

Laserfiche® for Higher Education



A Campus-Wide Solution to Cut Costs and Improve Productivity

Run Smarter®

Laserfiche®

A Solution to Manage Information Enterprise-Wide

It's no secret that state budgetary factors are motivating colleges and universities to leverage economies of scale to their benefit. Therefore, it is essential for institutions to select an ECM system that centrally and securely handles all institutional content while still offering individual departments and schools the flexibility to adapt their work processes to their unique needs.

That's why leading colleges and universities worldwide are turning to Laserfiche ECM. Laserfiche combats the inefficiency and expense of paper records, with tools to quickly and reliably collect, store, search and share information campus-wide.

The Benefits Are Clear

The College of Agriculture and Life Sciences at Texas A&M University, Texas A&M AgriLife Research and Texas A&M AgriLife Extension Services banded together to implement Laserfiche in 2006. Since then, they have:

- ▶ Eliminated 58 overnight mail deliveries per week.
- ▶ Eliminated the need to make 23,335 copies per week.
- ▶ Freed up more than 1,350 square feet of space by removing file cabinets.
- ▶ Saved more than 8,000 staff hours spent on filing per year.
- ▶ Eliminated the need to print 200,000 pages per year.

“The more folks you have using Laserfiche, the more benefits you realize from it. Although most departments act independently when it comes to their software decisions, in fact, we're all interconnected. A unified Laserfiche system is a great thing for any university.”

Robson Agnew, Records Manager, University of British Columbia

ECM at Work on Campus

ADMINISTRATION

Advancement

- Streamline donation processing
- Integrate with donor management applications
- Protect donor privacy with powerful security features

Business Office

- Automate the HR onboarding process
- Organize payroll documentation for easy storage and retrieval

Chancellor/President

- Scan incoming mail for electronic distribution
- Manage meeting agendas
- Improve staff efficiency by eliminating paper-based processes

Finance

- Automate AP/AR processing
- Accelerate the procurement process
- Simplify audits of financial records

Legal

- Manage contracts
- Simplify litigation preparation
- Rapidly respond to e-discovery requests

Provost

- Create a faculty records management standard
- Secure sensitive and confidential personnel files
- Accommodate individual schools' unique filing systems and primary applications

Public Affairs

- Automate press release approval
- Create a searchable press release portal
- Organize and store records related to community events

Research Administration

- Organize proposal templates
- Facilitate auditing and compliance
- Automate grant and contract management

OFFICE OF PUBLIC SAFETY

- Manage and distribute case knowledge
- Control access to reports and evidentiary records
- Deliver building plans, HAZMAT reports and other intelligence to first responders via the Web

ACADEMIC DEPARTMENTS

- Manage faculty records
- Store and route reprints for peer-review articles
- Centrally and securely track student grades

ADMISSIONS

- Accelerate admission processing
- Automate financial aid processing and disbursement
- Automate transcript processing



FACILITIES / PHYSICAL PLANT

- Organize building plans and schematics
- Grant tradesmen remote access to documents
- Automate project approval process

STUDENT SERVICES

- Guarantee student record security
- Accelerate housing assignment
- Organize and store assessment test results

Precision Tools for a Productive Campus

Cost-Effectively Deploy Campus-Wide

Laserfiche solutions deploy in days, not months, so you achieve a rapid return on your investment. The Laserfiche product suite's modular design gives you the flexibility to choose just the options you need, enabling you to design the ideal solution for your needs.

Universities with multiple locations or a large number of users will appreciate the flexibility of Laserfiche Rio™, a turnkey solution for enterprise document management requirements.

Laserfiche Rio includes:

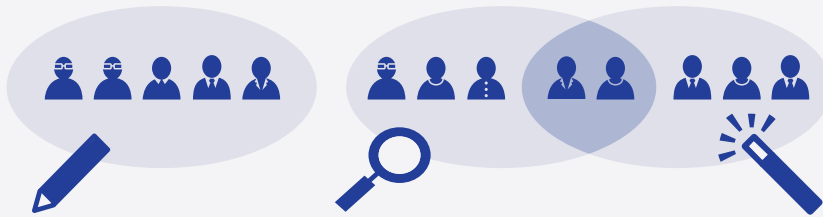
- ▶ Enterprise content management.
- ▶ Document imaging and DoD 5015.2-certified records management functionality.
- ▶ High-volume document capture and processing.
- ▶ Windows and Web-based interfaces.
- ▶ A customizable public Web portal.
- ▶ Electronic forms that simplify data collection and processing.
- ▶ Integrated business process management.
- ▶ Mobile apps that provide secure, anywhere access to information.
- ▶ Digital signature functionality.

Named-user licensing simplifies purchasing—just count the number of users you'll need. Laserfiche Rio also provides the flexibility of unlimited retrieval licensing for public users, simplifying access for students, parents and adjunct faculty.

The ECM Shared Services Model

When colleges and universities implement Laserfiche ECM as a shared service (i.e. the central IT department purchases, implements and maintains one ECM system that all departments use), they reduce costs by eliminating redundant systems, leveraging economies of scale and tapping into collective skillsets.

BUSINESS UNITS



USER MANAGEMENT

Users are managed at the operational unit/department level through Active Directory accounts. Users are assigned to groups based on their roles and can be members of multiple groups. Central IT does not manage this process.

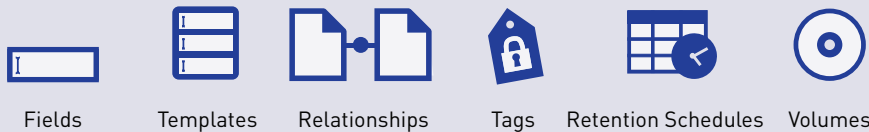
CENTRAL IT



Reviewer Approver Scanner Read-only Sub-admin Power user

STANDARDIZED ROLES

Central IT will create standardized roles through which Feature Rights, Privileges, Audit Settings and the like are applied. Departmental groups will inherit their rights based on the role(s) they are assigned.

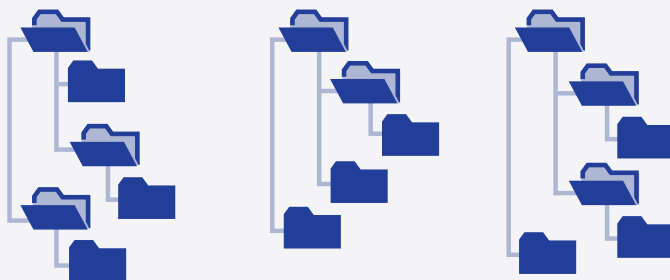


Fields Templates Relationships Tags Retention Schedules Volumes

STANDARDIZED REPOSITORY OPTIONS

Central IT will create standard sets of repository elements such as Templates, Fields, Relationships, Tags, Retention Schedule and Volumes. Operational units/departments will use the elements that best meet their needs.

PRESENTATION (USER)



DISCRETIONARY ACCESS MANAGEMENT

Sub-administrators are given the ability to control access within their section of the repository. Operational units/departments have control over folder structure, naming conventions and how the standardized repository options are used.

“By offering Laserfiche to The Texas A&M University System as a shared service, Texas A&M is able to make available economies of scale and document sharing that individual departments could not approach by themselves. This is value delivery at its best.”

Judith Lewis, Senior IT Manager, IT Solutions and Support, Texas A&M University



Enhance Administrative Efficiency

The business office—responsible for recruiting new faculty and staff, administering payroll, processing invoices and managing contracts and grants—must deal with a large volume of documents every day. Laserfiche increases efficiency and cuts costs by eliminating paper-based processes, improving information accessibility and decreasing the need to store paper documents.

- ▶ Improve staff productivity by removing the need for time-consuming manual filing.
- ▶ Digitize and barcode timesheets for easy storage and retrieval.
- ▶ Ensure adoption and minimize training with Laserfiche's user-friendly, Windows-like interface.
- ▶ Free up space for faculty offices or classrooms by eliminating the need for file cabinets.
- ▶ Cut costs by decreasing the need for overnight shipping and mailing.



Ensure Continuity of Operations

It's crucial for colleges and universities to plan and prepare for operational interruptions. Laserfiche plays a key part in your disaster recovery plan, securing records and limiting the cost and effort of salvage and restoration.

- ▶ Ensure that administrators, maintenance employees and local police and fire departments can instantly access critical documents via the Web in case of an emergency.
- ▶ Organize architectural drawings, schematics and operations manuals by school so they're easily accessible in times of crisis.
- ▶ Use Laserfiche Plus portable media publishing to reconstruct damaged or destroyed repositories and provide immediate access to authorized personnel.

“Disaster recovery has really been the catalyst for enterprise-wide adoption of Laserfiche.”

David Haughland, Associate Vice Provost, University of Southern California



Integrate with ERP, SIS and Other Existing Applications

With Laserfiche, you support the applications you already use for managing student records, accounting and resource planning. Laserfiche's open architecture speeds integration with existing applications—while programming tools and pre-packaged modules limit costs and minimize the burden on IT staff.

- ▶ Process the output of an existing system (e.g. invoices and purchase orders from an ERP system) using Laserfiche capture tools that monitor network directories and process files based on business rules defined for each document type.
- ▶ Eliminate redundant data entry by automatically looking up data from—or sending data to—an existing application.
- ▶ Make documents stored in Laserfiche available in existing applications through image enablement.
- ▶ Trigger Workflow activities from third-party applications.
- ▶ Provide Laserfiche ECM capabilities from Web portals—including Microsoft SharePoint sites—to improve information organization and access enterprise-wide.



Centrally and Securely Manage Records

With Laserfiche, your institution establishes enterprise-wide standards and security policies for student and faculty records while at the same time giving individual schools the ability to store information and configure business processes according to their specialized needs.

- ▶ Implement DoD 5015.2-certified records management to simplify compliance with recordkeeping requirements.
- ▶ Eliminate lost and misplaced files.
- ▶ Ensure consistency of information with custom templates.
- ▶ Instantly fulfill data-driven, specialized queries of records.
- ▶ Protect confidential files with granular, role-based security, as well as blackout and whiteout redactions.
- ▶ Log system activity to demonstrate compliance with regulations.

“Laserfiche allows the central graduate office to share student records securely and efficiently with the various departments and faculties across campus.”

Matt Dumouchel, Information Systems Manager, The University of Western Ontario-School of Graduate and Postdoctoral Studies

Streamlining the Business of Higher Education

The White House has put colleges and universities across the country “on notice” that tuition rates cannot continue to rise, emphasizing that “higher education... is an economic imperative that every family in America should be able to afford.”

Reduced costs for paper and document handling and easier access to stored information are widely known benefits of implementing ECM. What may not be evident are the savings to be gained from using electronic documents as the foundation for automating a college or university’s business processes.

Laserfiche includes a workflow component designed to automate paper-heavy business processes such as the financial aid approval process, contract management and grant management. With Laserfiche, each department can design its own workflows, eliminating repetitive manual tasks and unlocking an impressive ROI.

Laserfiche Advantages*

- ▶ **Enhance overall office efficiency** by eliminating paper-based processes, improving information accessibility and decreasing the need to store paper documents.
- ▶ **Facilitate document sharing** with colleagues while protecting confidential information.
- ▶ **Ensure continuity of operations** by securing records and providing Web access to critical documents during emergencies.
- ▶ **Streamline life-cycle management** of business records with automatic enforcement of consistent, organization-wide records policies.
- ▶ **Support compliance** requirements for document retention.

* As identified by the Texas A&M University System

“Laserfiche will help you in your daily processes. It will improve employee morale. It will help you in everything you are trying to do for students.”

John Hermes, Chief Technology Officer, Oklahoma Christian University

Simplify Contract Management

The contract management process is a risky one, and handling it manually increases costs and leaves your institution open to compliance infractions. Automating the creation, review and approval of contracts with Laserfiche drives consistency and efficiency throughout the process.

TEMPLATE CREATION	A master template and clause library are created and stored in Laserfiche.
CONTRACT COMPILATION	Contracts department modifies the template based on the specifics of the deal.
REVIEW AND APPROVAL	Laserfiche Workflow automatically routes the contract to the appropriate people for review and approval. Changes are tracked using Laserfiche version control.
BUSINESS RECORD	Contract life cycle is managed using the Laserfiche Records Management Edition, which automates retention and disposition according to the rules governing your institution's business practices.
CONTRACT RENEWAL	When a contract is up for renewal, the contracts department reviews the existing contract and modifies it based on current needs.

“By digitizing and automating our contract management process with Laserfiche, we’ve significantly cut down on mailing and couriering costs, and we’ve also enabled simultaneous review of contracts by as many as six different offices. Furthermore, by storing finalized contracts in a shared Laserfiche folder, we give all relevant parties access to their contracts, making the auditors happy.”

Kristin Nace, Assistant Vice President for Fiscal Services and Budgets,
Texas A&M Health Science Center

Accelerate Accounts Payable Processing

The accounts payable process touches every department on campus. When the A/P process is inefficient, it doesn't just make life difficult—it costs money. When you consider that even small colleges consist of multiple autonomous schools with relatively few shared services, it's easy to see how the journey of a simple invoice can come to resemble a twisted maze.

Laserfiche speeds and simplifies the A/P process, reducing processing time and eliminating late fees.

CAPTURE	Invoices are batch scanned and processed using Laserfiche Quick Fields.
ROUTING	Laserfiche Workflow automatically routes invoices to their assigned A/P staff members, who receive notification via e-mail.
REVIEW AND APPROVAL	A/P employees review relevant invoices in Laserfiche. Using a drop-down menu, they approve or deny payment. Workflow then routes the invoices back to the technicians who cut the checks.
AUDITING	Laserfiche Audit Trail tracks all activity within the Laserfiche repository throughout the entire process, giving the organization greater visibility into—and control over—the way A/P-related tasks are performed.
STORAGE AND ARCHIVAL	Invoices and related documents are stored in the Laserfiche repository for easy retrieval. With integration, these documents can be made available through other applications

“One huge advantage of Laserfiche over other ECM systems is that it is very easy to adapt to changes in the way we process our invoices. Laserfiche also tracks changes to documents and keeps a record of who has seen or worked on any given invoice, increasing the level of control we have over document security.”

Terry Hamilton, Former Accounts Payable Manager, Chancellor's Office,
California State University

More Quickly Disburse Financial Aid

Every day, students submit applications, promissory notes and copies of birth certificates, passports, tax returns and more to your financial aid department. Laserfiche enables your team to quickly and easily capture, organize and process the paper and electronic documents required to disburse financial aid to qualified candidates.

CAPTURE	Capture, process and file aid-related documentation from a wide variety of media (paper, e-forms, electronic documents, etc.) and software applications.
PROCESSING	Laserfiche Quick Fields processes incoming documents, eliminating the need for manual data entry by auto-populating template fields, and automatically assigns them to financial aid counselors based on predefined criteria.
ROUTING	Laserfiche Workflow automatically routes documents to financial aid counselors, who use a drop-down menu to approve or deny applications. Laserfiche can be integrated with other software applications, allowing staff to access documents from the application of their choice.
STUDENT ACCESS	Using a Laserfiche Public Web Portal, students get real-time access to their digitized applications and quick online feedback about their application status.
RETENTION	Documents are filed to their final locations in the central Laserfiche repository and remain there for archival and retrieval purposes.

“If I needed to send out a big batch of award letters before, they were printed, copied, mailed and filed. When I understood that Laserfiche could send those letters to the students’ electronic files with the click of a button, that was a big ‘aha’ moment for me. Thanks to Laserfiche, our department saved \$31,000 in hard costs in less than two years.”

Clint LaRue, Director of Student Financial Services, Oklahoma Christian University

About Laserfiche

Since 1987, Laserfiche has used its Run Smarter® philosophy to create simple and elegant enterprise content management (ECM) solutions. More than 32,000 organizations—including numerous public and private colleges and universities—use Laserfiche® software to streamline document, records and business process management.

By digitizing paper archives, Laserfiche enables higher education institutions to cut operational costs, improve staff productivity and provide quality student and faculty services. Secure Web access enables easy information sharing with students, parents and satellite campuses, while comprehensive security options ensure compliance with government- and industry-mandated standards. And since Laserfiche is designed for interoperability, it interfaces easily with key institutional systems like ERP, student information systems and other core administrative applications.

Your Next Step



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Learn more
(800) 985-8533
info@laserfiche.com
3545 Long Beach Blvd.
Long Beach, CA 90807



◀ **Watch a video featuring Texas A&M University Kingsville**

Laserfiche Product Suite

The Laserfiche system is designed to be straightforward to purchase, deploy, extend, administer and support. Laserfiche solutions deploy quickly and easily scale to accommodate both an increasing number of users and high-volume repository growth.

Laserfiche Rio®

laserfiche.com/rio

- ▶ Enterprise content management
- ▶ Document imaging
- ▶ DoD 5015.2-certified records management
- ▶ Business process management
- ▶ Complete auditing and security controls
- ▶ Production-level document capture and processing
- ▶ Unlimited Laserfiche servers to support backups, failover clusters and testing environments

Laserfiche Avante®

laserfiche.com/avante

- ▶ Document management
- ▶ Business process management
- ▶ Optional Web client and Audit Trail tracking
- ▶ Optional DoD 5015.2-certified records management

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