

# QUICKER BETTER SAFER

## HUMAN RESOURCES

Joanna Slusarz





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# Laserfiche®

## QUICKER BETTER SAFER | Human Resources

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# INTRODUCTION

Human resource management isn't easy, but an effective program enables your organization to attract, recruit and retain the employees who will move the organization forward and achieve its strategic goals. Having the right processes in place goes a long way toward ensuring the success of both the HR department and the organization as a whole.

Recruiting and onboarding new employees, evaluating employee performance and processing travel requests are just a few of the functions performed by a typical HR department. All of these processes involve documents that need to be accessed and reviewed by multiple people. This often equates to a lot of paper and inefficiency. But this does not have to be the case!

This book contains a wealth of customer-built solutions (including step-by-step instructions and screenshots) from organizations that have used Laserfiche enterprise content management (ECM) software to make dramatic changes to their HR functions.

Inside, you'll read how various organizations are using Laserfiche to:

- Onboard new employees.
- Process travel requests.
- Manage employee records.

We invite you to tap into their knowledge to help your HR department automate strategic business processes while cutting costs, reducing manual labor and complying with state and local regulations.





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This book contains 11 customer-built solutions.  
For more than 200 additional solutions, please visit:

**[Laserfiche.com/SolutionExchange](https://laserfiche.com/SolutionExchange)**

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# DEPARTMENT-WIDE IMPLEMENTATION

Many HR processes are interrelated and touch multiple departments. By automating these processes, organizations experience efficiency throughout the entire enterprise.

This section describes how a number of organizations have successfully implemented Laserfiche across HR.

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Steinhafels	24





DEPARTMENT-WIDE IMPLEMENTATION

# Edgewood Independent School District

**INDUSTRY:**

Education

**NUMBER OF EMPLOYEES:**

1,000 - 5,000

**HEADQUARTERS:**

Edgewood, TX

*Laserfiche Solution Contributed By: Adam Galvan,  
Technology Director, Edgewood Independent School  
District*

At Edgewood Independent School District (EISD), teachers, staff and administrators were used to filling out a paper form for anything from requesting time off to requesting funds for a classroom pizza party. Here is how EISD eliminated more than 200 different types of paper forms and made approval processes more efficient with Laserfiche Forms.

## Laserfiche Forms Has More Than 200 Uses at EISD

Laserfiche Forms is used throughout the entire district. Here are just a few different ways that EISD uses Laserfiche Forms:

- Administrators use Laserfiche Forms to request new construction projects.
- Safety and security officers use Laserfiche Forms for alarm code authorization requests.
- The EISD police department uses Laserfiche Forms to report truant students.
- Athletic event personnel fill out their timesheets in Laserfiche Forms on-site during sports events and submit them via their iPads.
- Teachers use Laserfiche Forms to request funding for pizza parties.
- New employees use Laserfiche Forms to enroll for benefits.
- Employees submit their resignation or retirement requests with Laserfiche Forms.
- The human resources department uses Laserfiche Forms for requesting new positions.
- Staff uses Laserfiche Forms to submit and approve travel settlements.

Here is an example of a form that is used to request new positions:

HR- PR Form



Part A (Check Applicable Boxes and Provide Information Requested)

Campus/Dept

Campus/Dept Name

Funding Source

Job Category

New Position

Beginning Date

Ending Date

Pay Grade

Yes

No

Teacher

Professional/Administrative

ParaProfessional

Auxiliary

Temporary

Part-Time

Full-Time

Substitute

Existing

Yes

No

AM

AP

PG

AUX

IS

PD

IT

PA

(If Applicable)

Part B (Check applicable categories and provide information requested)

Categories

Specify Student Ratio

Teaching Unit Only

Replacement

Delete Position

New

\*Total Number of Students currently enrolled

Complete Budget Information for Position Requested

Budget Information

Budget Number

REG.

ST COMP.

SP ED.

BIL

VOC.

TITLE I

Other

Include all budget account numbers and percent of funding

%

Save unfinished form to complete later

Submit



## Laserfiche Forms as Part of a Business Process

A number of forms used at EISD need to go through an approval process. Principals, directors, academic officers and business/operations officers are all involved in these approvals and have administrative rights to access tasks assigned to them.

Some of the review/approval processes require signatures of approval. For each section that requires a signature, EISD has incorporated a line item where the submitter must enter the last four digits of his or her social security number as a replacement of the physical signature.

**Fingerprinting Acknowledgement**

By signing below, I hereby acknowledge that I understand that, as a non-certified employee hired on or after January 1, 2008, I must submit my fingerprints and identification information to the Texas Education Agency (TEA) and the Department of Public Safety (DPS) before beginning employment. I also acknowledge that I understand that, at the discretion of the District, I may be allowed to begin work before the fingerprint process is complete. I further acknowledge that I understand that my continued employment is contingent on the results of my criminal history report. I understand that if the TEA finds that I am ineligible for employment under the provisions of the Texas Education Code (TEC) § 22.085, I must be discharged by the District. In addition, I understand that a criminal history information clearinghouse will be created that will provide updates of any subsequent criminal record. I understand that based on information in the clearinghouse record, TEA will certify to the District whether I am eligible for continued employment. If I should be found to be ineligible for employment based on a subsequent criminal record, I understand that the District must discharge me immediately from my employment. In addition to the foregoing information, I understand that, before being offered employment by the District, I must be cleared by a name-based criminal background check based on the District's own employment requirements. I also understand that the District may discharge me from employment if I fail to disclose in my employment application a conviction of any felony, or misdemeanor involving moral turpitude. TEC § 22.085 (d).

**Last 4 of Social Security**

**Date**



Once a form has been submitted, Laserfiche Workflow applies a digital signature corresponding to the name of the approver. EISD added signature certificates for each principal, director, academic officer and operations officer.

Metadata

Fields

Tags

Links

Versions

Signatures: 3

Sign...

Validate

Remove...



Signed By:

MHS Admin

Signed Date/Time:

11/1/2013 8:41:45 AM

Reason:



Signed By:

Chief Academic Admin

Signed Date/Time:

11/1/2013 8:41:45 AM

Reason:



Signed By:

Supr Admin

Signed Date/Time:

11/1/2013 8:41:45 AM

Reason:

## Example: Human Resources

Every form used by the human resources department is part of a larger business process. Here is an example of the HR-Processing Packet form that initiates the new employee onboarding process.

**HR- Processing Packet- Admin**

**New Hire Data**

Social Security Number

Employee Number


First Name

Middle Initial

Last Name

Maiden Name

Generation ☐ Jr ☐ Sr ☐ I ☐ II ☐ III ☐ IV ☐ V

Date of Birth  

Home Address

Street Address

Address Line 2

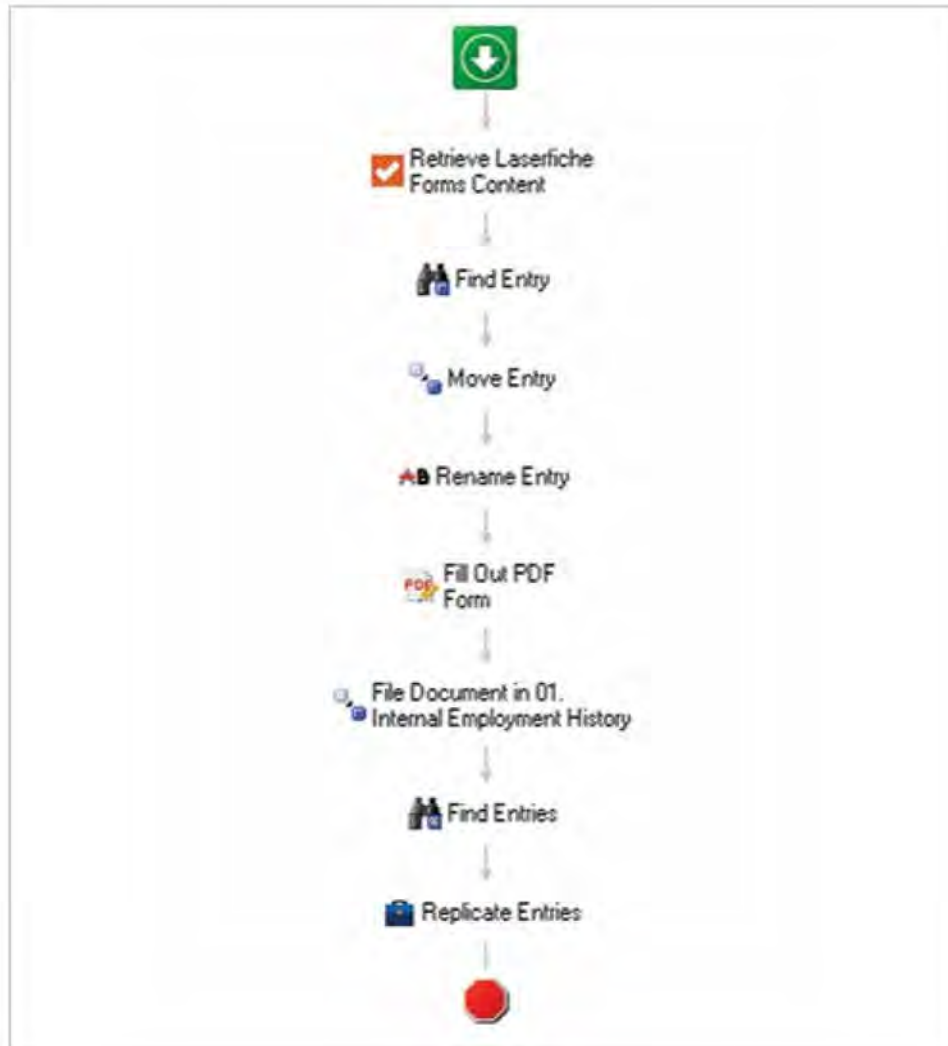
City  State / Province / Region

Postal / Zip Code  Country

Once the employee has submitted the form, it is automatically sent to an HR specialist for review and approval. The HR specialist makes any necessary changes before approving and submitting the form. This action triggers Laserfiche Workflow.

Laserfiche Workflow populates the standard EISD HR processing PDF form with the data extracted from Laserfiche Forms and stores it in a new folder in Laserfiche.

Here is what this workflow looks like:



Not all paperwork that a new employee must fill out can be electronic. One example of this is certain tax forms. The employee fills out and signs the tax forms by hand. An HR specialist then scans them directly into Laserfiche. He then selects the type of form from a field in the template that routes the tax forms to the employee's folder in Laserfiche.

## Advice for Using Laserfiche Forms

Here are some suggestions to help with migrating paper forms to Laserfiche Forms:

- Consolidate several paper forms into one Laserfiche form by using the rules to make certain sections appear only if particular criteria are met.

The screenshot displays the Laserfiche Forms rule configuration interface, showing two rule sets for conditional display.

**Rule 1:**

- Available Sources:** localhost LFDyna
- Table / View:** JobCodes
- Name:** JobCodes
- When:** First Letter of Job matches with data source column First Letter
- Fill:** Job Code Name with data source value Job Code

**Rule 2:**

- Available Sources:** localhost LFDyna
- Table / View:** CAMPUS/DEPT
- Name:** CAMPUS/DEPT
- When:** New CAMPUS/DE matches with data source column TYPE
- Fill:** CAMPUS/DEPT N with data source value NAME

Each rule set includes a 'When' condition and a 'Fill' action, with plus and minus icons for adding or removing rules.

- Simplify forms completion by using database lookups. Prompt the user to enter his ID and configure the system to populate other information such as name and job title directly from the database. This can reduce data entry errors and make filling out forms faster. For example, any form that is filled out by an EISD employee populates the employee's name and other identifying information based on the employee number entered.

System Security

New Data Source

Update

Test

Data Sources

My User Settings

Data Sources

Serverlocalhost

DatabaseLFDynamicFields

Accounteisd\laserfiche

Hide Details

▼Tables and Columns

▶CAMPUS/DEPT

▶Forms-DeptCampus

▶JobCodes

▶Vendors

▶Stored Procedures

Processes

Enter (press enter)

☒ AP- Consultant Evaluation Report

☒ AP- Mileage Reimbursement

☒ AP- Travel Settlement

☒ ATH- Officials' / Support Personnel's Payment Vc

☒ FS- Field Trip Lunch Request

☒ FS- Pizza Party Reservation

☒ HR- Admin Pkt

☒ HR- Final Applicant Rating (old)

☒ HR- Interview Questions

☒ HR- Interviewing Pkt

☒ HR- New Hire Form

☒ HR- Para Aides Pkt (183)



## Benefits of Laserfiche Forms

Migrating all of the district's paper forms to Laserfiche Forms and Laserfiche Workflow has resulted in the following benefits for EISD:

- Form submitters can see where in the review/approval process their form is at all times.
- Reviewers and approvers are notified by email of pending tasks so that they are able to act on them immediately.
- Everything is stored in one central location and can be accessed by anyone with the appropriate permissions.
- Users can easily fill out and submit forms from a mobile device when they are out of the office or classroom.



DEPARTMENT-WIDE IMPLEMENTATION

# Muscogee Creek Nation Department of Health

**INDUSTRY:**

State and Local Government

**NUMBER OF EMPLOYEES:**

500-1000

**HEADQUARTERS:**

Okmulgee, OK

**EXISTING LASERFICHE  
INTEGRATIONS:**

LincDoc

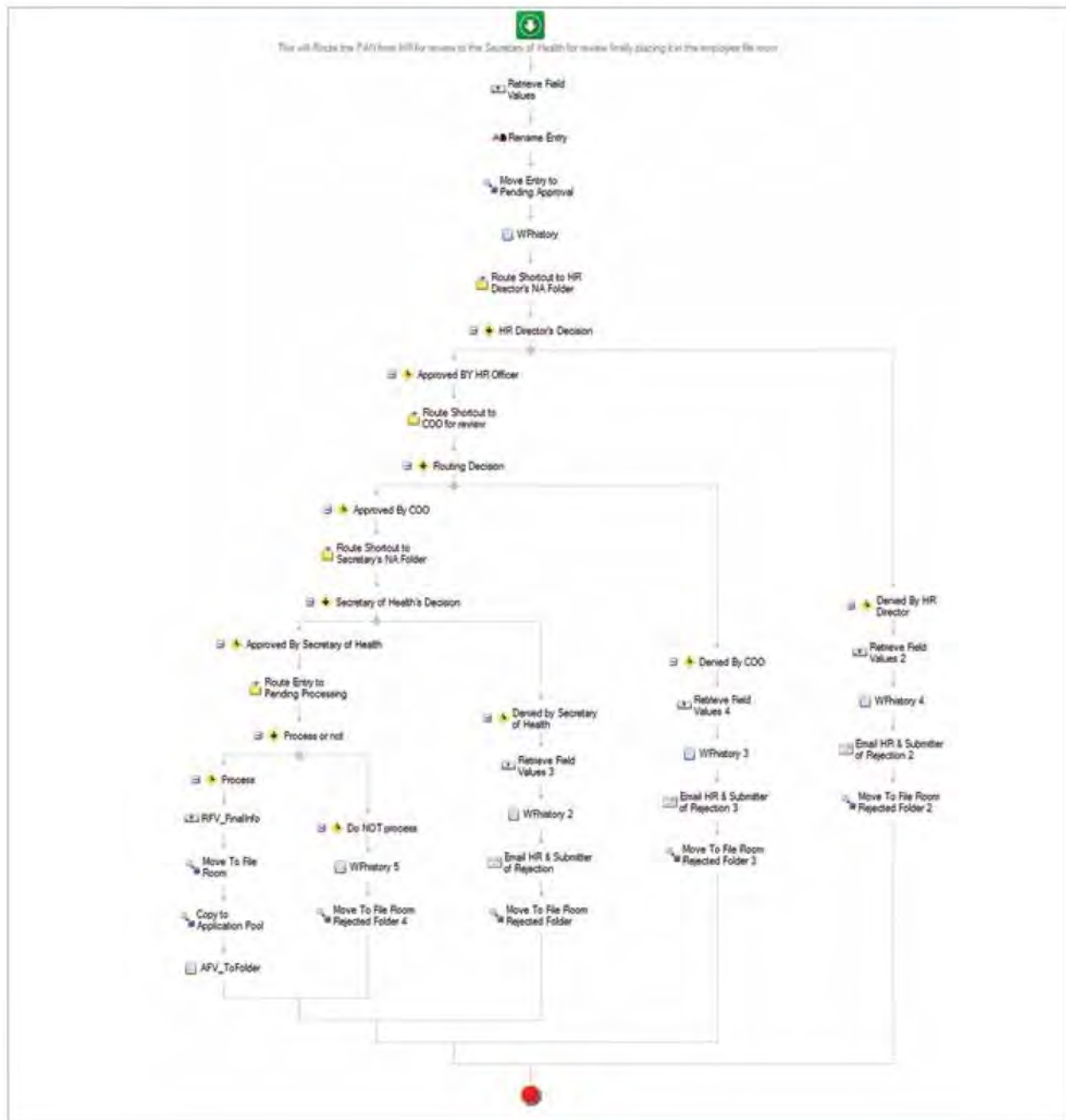
*Laserfiche Solution Contributed By: Russell Torbett, Human Resources Officer and Elexis Hennigh, Hospital Informatics Manager, Muscogee (Creek) Nation Department of Health*

The Muscogee (Creek) Nation Department of Health employs more than 1,000 people in multiple offices spread out over a wide area. This means that a large number of documents and files are processed and accessed regularly. Here is how the department has made almost all HR functions paperless by integrating Laserfiche with LincDoc.




## Human Resources Onboarding

Whenever a manager needs to hire an additional employee, he must submit a staffing request through an electronic staffing request form. This form is automatically saved in Laserfiche, where Laserfiche Workflow routes it through three different levels of approval (HR Director, Chief Operating Officer and Director of Health) before the position is opened. Here is what this workflow looks like:



Once the position is approved, it is posted online. Applicants can apply by filling out an electronic job application form.



Personal Information

# Muscogee (Creek) Nation

## Health System

### Employment Application

All applications for employment must be made on this Employment Application Form. Additionally, each applicant should address the KSAP's in the applicable Vacancy Announcement. All information submitted on this application is subject to verification. False or misleading responses may result in disqualification for employment.

• First Name	<input type="text"/>	
Middle Name	<input type="text"/>	
• Last Name	<input type="text"/>	
• Street Address	<input type="text"/>	
• City	<input type="text"/>	
• State	<input type="text"/>	
• Zip Code	<input type="text"/>	
Daytime Phone(8AM-5PM)	<input type="text"/>	
• Phone # where messages can be left(if different than one listed)	<input type="text"/>	
Email Address	<input type="text"/>	
• Social Security Number	<input type="text"/>	
Driver's License #	<input type="text"/>	

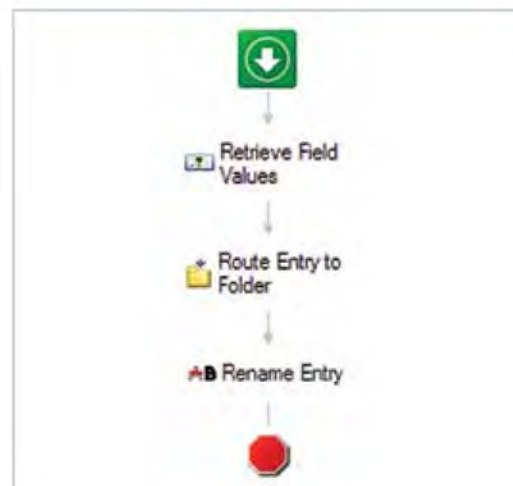
Once the form is submitted, it is saved in Laserfiche, where a template is applied and automatically populated. Here is what this template looks like:

The screenshot shows a Laserfiche form titled "Template: Assessment - Applications For Employment". The form is a vertical list of fields, many of which are dropdown menus. The fields include:

- Social Security Number
- Employee #
- Name
- Job Number
- Job Title
- Job Location
- Department
- Tribal
- Tribal Name
- Applicant's Email Address
- Applicant Status
- Reviewing Manager
- Manager's Hiring Decision
- Manager's Hiring Selection Justification
- HR Officer's Decision
- HR Officer's Decision Reason
- COO's Decision
- COO's Decision Reason
- Secretary of Health's Decision
- Secretary of Health's Decision Reason
- Background Check & Clearance
- Orientation Date

At the bottom right of the form is a button labeled "Add/Remove Fields..."

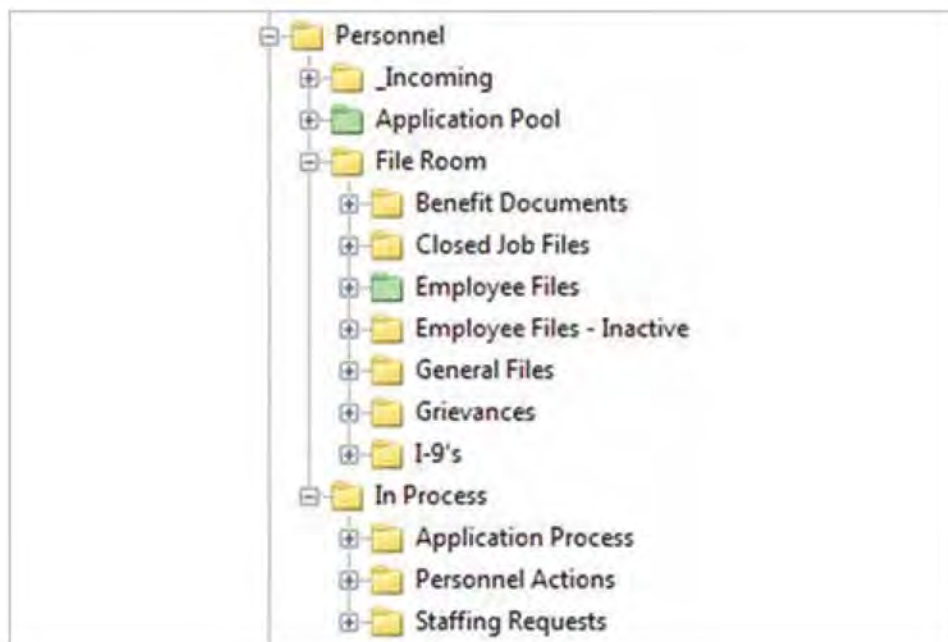
Laserfiche Workflow routes the application to the Application Pool folder.



The hiring supervisor looks through the candidates and schedules the interviews. After the interviews, the hiring supervisor either recommends hiring the candidate or rejects the candidate. He signifies his decision by updating the value of a metadata field.

This action triggers Laserfiche Workflow to route the application through the various approvers. If a candidate is selected for the position, an email is generated and sent to all the other candidates notifying them that a selection has been made.

Here is what the folder structure looks like:





## Travel Request Process

Another process that the human resources department has automated is the travel request process. This process works as follows:

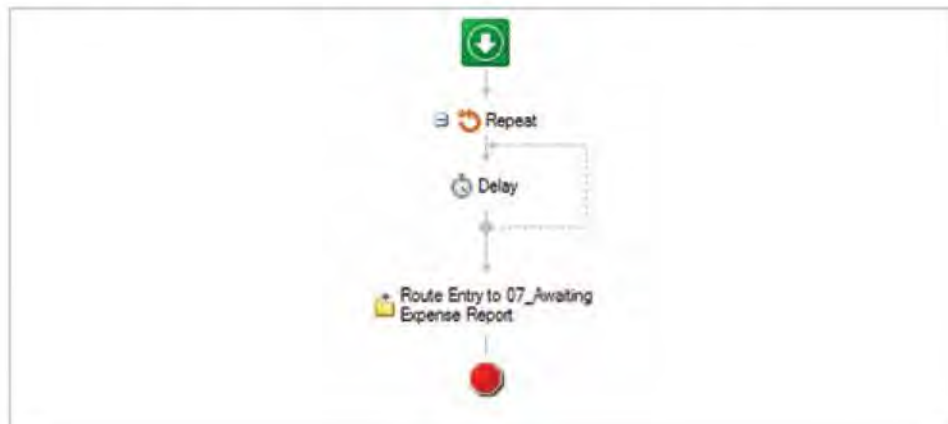
- An employee submits a travel request by filling out an electronic form, which is automatically saved in Laserfiche.
- Laserfiche Workflow picks up the form and routes it to the Pending Approval folder, where it waits until it is reviewed and approved by multiple parties. Here is what this workflow looks like:



- Once the travel request is approved, it moves to the Pending Processing folder, where it waits to be processed by the travel coordinator. Once processed, it is moved to the Pending Booking folder, where it waits for the hotel and flight information.
- Once the flight and hotel have been booked, the travel coordinator changes the value of a field, which triggers Laserfiche Workflow to move the form into the Pending Advance folder.
- Once a travel advance is delivered, the travel request is moved to the Pending Departure folder, where it stays until the employee's departure date. Laserfiche Workflow regularly and automatically checks the departure date against the current date. On the departure date, the travel request is routed to the Currently Traveling folder. Here is what this workflow looks like:

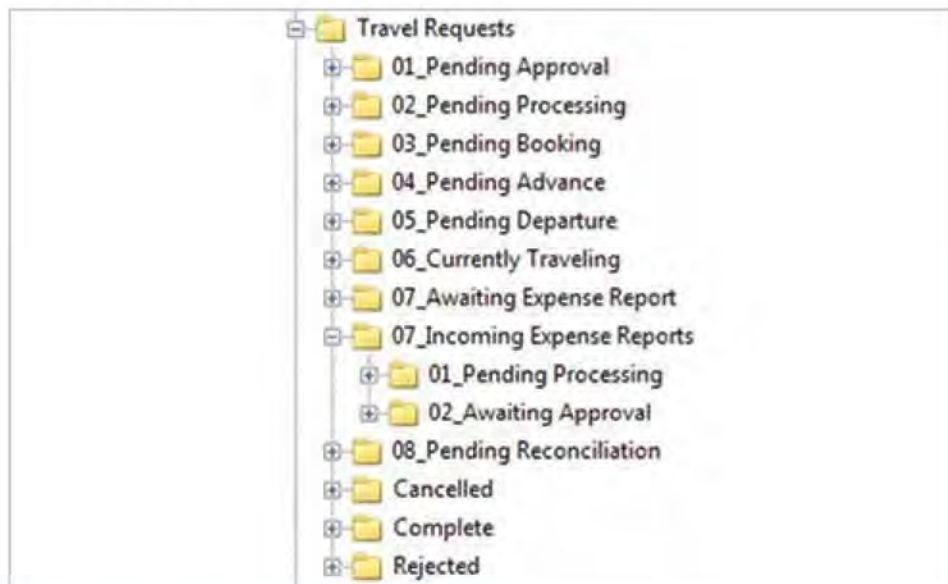


- Another workflow monitors the Currently Traveling folder. Once it finds that the travel return date has passed, it moves the travel request to the Awaiting Expense Report folder. Here is what this workflow looks like:



- When the employee returns from his travel, he fills out an expense report online. Incoming expense reports are moved to the Incoming Expense Reports\Pending Processing folder. Laserfiche Workflow also finds the corresponding travel request and creates a link between the two documents.
- Once the expense report is processed, it is moved to the Expense Reports\Awaiting Approval folder, where it awaits approval for cutting a check.
- Finally, the expense report is moved into the Pending Reconciliation folder. After it is reconciled, it is moved to the Complete folder.

Here is what the folder structure looks like:



## Benefits of Laserfiche

Implementing Laserfiche at the Muscogee (Creek) Nation Department of Health has resulted in the following benefits:

- If everyone is at their computer when the process kicks off, documents are approved in as little as five minutes. In the past, it would take at least a day just to send the document to the main office from another site. The whole approval process would take a week or more—even if everyone was in the office.
- Managers can log into Laserfiche on any given day and quickly see how many employees are out travelling, where they are and when they'll be back.
- Before Laserfiche, if someone needed to look at an employee file, he would either have to come to the main office in person or get it delivered. Deliveries by courier would take up to three days. Today, authorized people can view that information instantaneously.





DEPARTMENT-WIDE IMPLEMENTATION

# Steinhafels

**INDUSTRY:**

Commercial

**NUMBER OF EMPLOYEES:**

500-1000

**HEADQUARTERS:**

Waukesha, WI

*Laserfiche Solution Contributed By: Lynda Malmberg, HR Manager, Steinhafels Inc.*

Steinhafels Inc. is a furniture store chain operating in the Midwest with 700 employees spread out across multiple locations. The company's rapid growth resulted in hundreds of non-standardized forms, an ad hoc approach to collecting information and the lack of a standard method for onboarding employees. Here is how Steinhafels used Laserfiche Forms and Laserfiche Workflow to standardize and fully automate the HR onboarding process.

## Posting Job Openings

Steinhafels has as many as 60 different job openings at a time. Manually posting jobs to third-party career websites such as Monster.com is time consuming. Laserfiche has completely automated this process.

Now, a hiring manager can submit new job requisitions through Laserfiche Forms. Once submitted, the requisition is automatically routed to HR for approval.


## Job Requisition Form

This form is used to request a new Job Requisition.

---

**Requested By \***   
Your Name

**E-mail \***   
Your E-mail Address

**Date Requested \***  

**Job Title \***

**Job Location City \***


**Job Location State \***   
Use State Abbreviation


**Zip Code \***


### JOB INFORMATION


**Use Job Description Template? \*** ☐ Yes ☐ No


**Job Description and Requirements \***


**Internal/External \***  


**Division \***  

**Shift \***  

**Work Hours \***  

**Minimum Education Required \***  

**Prior Experience Required \***  



**Submit**

As part of the approval process, HR selects the job sites to which the job requisition will be posted (Monster, Career Builder or Milwaukee Jobs), the job categories and job types.

A screenshot of a web form with several dropdown menus. The fields are: 'Job Req CP Monster' (Yes), 'Job Req CP CareerBuilder' (No), 'Job Req CP MKE' (No), 'Job Req Monster Job Category' (Accounting/Finance/Insurance), 'Job Req Monster Occupation Subtype' (Actuarial Analysis), 'Job Req CB Job Type Code', and 'Job Req MKE Job Type Code'. A red 'X' icon is visible to the right of the 'Job Req Monster Occupation Subtype' dropdown.

Once the selection is made, Laserfiche Workflow posts the job to the various websites under the Steinhafels account. Here is the configuration of the HTTP Web Request activity that posts jobs to Monster:

A screenshot of the 'Properties' window for an 'HTTP Web Request MONSTER' activity. The 'Activity Name' is 'HTTP Web Request MONSTER'. The 'Activity Description' is 'Sends a request to a Web service and stores the response in a token.' The 'Web Service' is 'HRCrossPosting' with a host of 'http://localhost/HRCrossPost/PostingService.asmx' and authentication 'STEINHAFELS\laserfiche\_svc'. The 'Request' section shows a URI of 'PostJob', Method of 'POST', Content Type of 'application/x-www-form-urlencoded', and Content Body of 'jobId=%[RetrieveField/values2\_Job Req #]&sites=Monster'. The 'Timeout' is '100000' ms. The 'Preferred Response Format' is 'XML'.



An embedded link in the third-party career site's job listing takes the applicant to Steinhafels' website to fill out a job application in Laserfiche Forms.

**Application for Employment**

**Demographic Information**

Position Applying For\*

Referral Source\*

First Name\*

Middle Initial

Last Name\*

E-mail\*

Phone Number

Last 4 Digits of Social Security #\*

Street Address 1\*

Street Address 2

City\*

State\*

Zip Code\*

## Hiring Process

Once the applicant submits the job application, it is routed to the appropriate hiring manager. The hiring manager can either qualify the applicant as a prospect or reject him. If a candidate is rejected, he is notified by email. If a candidate is qualified as a prospect, a new field called HR New Prospect Status is added to the template with the initial value set as Prospect. Every time the hiring manager changes the value of that field, the applicant moves to the corresponding stage in the HR Hiring Process workflow.

Here are the different options that the hiring manager can select to move the prospect along in the hiring process:

- Rejected
- Left Message
- First Interview
- Second Interview
- Request Background Check
- Background Check Cleared
- Offer Pending
- Request Survey
- Onsite Survey
- Hired

To help HR and the hiring manager see the status of the applicant at a glance, the entry is renamed based on the corresponding status update.

Folders	Name	Pages
C-Mattress	Applicant - Bra...ng - 8/29/2014	3
C-Process Improvement	Applicant - Kat.../31/2014	3
C-Service	Applicant - Kel...wski - 9/1/2014	5
C-Upholstery	Applicant - Kyl... - 9/2/2014	3
Management Corporate	Applicant - Lon... - 9/2/2014	4
Management Merchandising	Applicant - Per...nester - 8/29/2014	4
Management Store	Applicant - Rol...cht - 9/2/2014	4
Management Warehouse	Applicant - Sar...lish - 8/29/2014	4
MidAmerica Bedding	Applicant - Sar...t - 8/31/2014	4
Store Appleton	Applicant - Tra... - 8/29/2014	4
Store Capitol	First Interview -... - 8/10/2014	5
Store Kenosha	First Interview -...cCoy - 8/10/2014	3
Store Layton	First Interview -... - 8/10/2014	4
Store Madison	First Interview -...fa - 8/19/2014	3
Store Mattress	First Interview -...orski - 8/12/2014	4
Store Menomonee Falls	First Interview -...ark - 8/13/2014	3
Store Oak Creek	First Interview -...Pree - 8/16/2014	3
Store Vernon Hills	Job Req - Hum...ts Administrative Assistant - 8/9/2014 - Corpor...	2
Store Waukesha	Left Message -...nuten - 8/11/2014	5
WHS General Employees	Left Message -...reoli - 8/11/2014	3
WHS-Cell	Prospect - Ami...s - 8/12/2014	4
WHS-Delivery	Prospect - And... - 8/13/2014	4
WHS-Rec-Forklift	Prospect - Ash... - 8/15/2014	4
I-9's	Prospect - Ash... - 8/16/2014	3
Job Requisitions	Prospect - Ash... - 8/18/2014	3
1. Pending for Cross Posting	Prospect - Bec... - 8/11/2014	3
2. Open Requisitions	Prospect - Bro... - 8/11/2014	4
Appleton	Prospect - Chr...rts - 8/12/2014	4
Bedding/New Berlin	Prospect - Cor...e - 8/27/2014	4
Capitol	Prospect - Dan... - 8/14/2014	5
Corporate	Prospect - Dan... - 8/20/2014	4
Human Resources Administ	Prospect - Dan...nhardt - 9/2/2014	4
	Prospect - Dan... - 8/10/2014	4
	Prospect - Emi... - 8/11/2014	4

Certain stages of the hiring process involve other steps to be performed. For example, when the status of Request Background Check is selected, an automatic request is sent to HR who contacts an external company to initiate a background check. This company sends an email to the candidate letting him know that a background check has been requested. When the check is completed, HR is notified by email to review the results on the background check company's website.

If the results are favorable, the candidate's status is changed to Background Check Cleared and the candidate advances to the pre-employment drug screen phase.

If the drug screen is successful, the candidate's status is changed to Hired. Laserfiche Workflow then:

- Renames the application to indicate that the employee has been hired.
- Inserts relevant new employee data, such as name and address, into the "HR Employee Number Tracking" database.
- Gets the generated employee number from the database and assigns it to the application.
- Sends two emails:
  - One email asking HR if there are any additional hires required for the position.
  - Another email providing the hiring manager with a link to the New Hire Form and the employee number.
- Creates a new employee folder and the necessary subfolders.
- Assigns the "HR Employee Folder" template to the employee folder.
- Moves the original employment application and any documents that the new hire submitted when applying into the newly created employee folder.



In the meantime, the hiring manager fills out the New Hire Form in Laserfiche Forms. Once the employee number is entered, most of the data is populated based on the information in the “HR Employee Number Tracking” database.

After the form is submitted, Laserfiche Workflow sends the link to the PDF version of the form (stored in Laserfiche) to HR and IT, along with the information they require to complete their respective work (such as setting up the user in the computer system, assigning a new phone number, etc.)

New Hire Form

Is Employee a rehire?\*

No

Supervisor Badge #\*

Supervisor First Name\*

Supervisor Last Name\*

EE Badge #\*

First Name\*

Middle Initial\*

Last Name\*

Company\*

INC

INC

Division - Inc\*

Department - Inc\*

Class - Inc\*

Sales Zone\*

Starting Data

Location of Orientation\*

Start Date\*

Start Time\*

Employment Status\*

PIH #\*

Pay Type\*

Pay Rate

System Access\*

☐ Phone Extension/Voicemail

☐ GERS Access

☐ Network computer set-up

☐ Gmail

☐ Managers Dashboard

☐ Sales Associate Dashboard

☐ Red Prairie

☐ None

☐ Other

Special comments or instructions

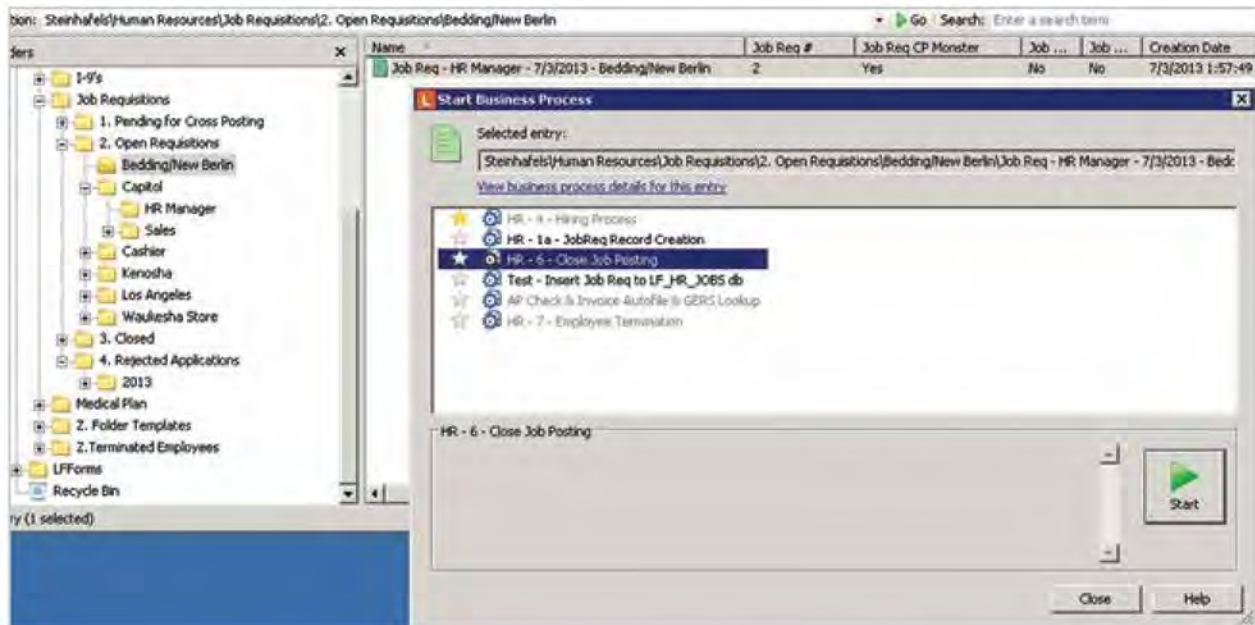
Submit



## Closing a Job Requisition

If the job posting can be closed and the existing applicants or candidates for that position will no longer be moving forward in the hiring process, HR can change the HR New Prospect Status field to Rejected. Laserfiche Workflow sends an email to the applicants and moves the rejected files to a rejected applications folder.

HR then initiates the Close Job Posting Laserfiche Workflow business process on the original job requisition document.



This Laserfiche Workflow business process moves the job requisition to a separate folder and removes the job listing from third-party career websites.

## Benefits of Laserfiche

Implementing Laserfiche at Steinhafels Inc. has resulted in the following benefits:

- The HR and accounts payable implementations alone have resulted in savings of \$78,369.20 per year. Laserfiche paid for itself in direct money and time savings within the first two years of the implementation.
- All employee files are immediately available and detailed security settings allow Steinhafels to control who has access.
- The hundreds of disparate hiring and application forms across the organization have been consolidated into 59 structured and consistent forms.





# HIRING

At some point, every organization needs to hire new employees. Digitizing and automating the process of recruiting and hiring employees saves paper. More importantly, it makes existing staff members more efficient in dealing with hiring-related tasks. In this section, a number of organizations share how they have automated various aspects of the hiring process with Laserfiche.

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HIRING

# Breckenridge Grand Vacations

**INDUSTRY:**

Commercial

**NUMBER OF EMPLOYEES:**

200-500

**HEADQUARTERS:**

Breckenridge, CO

*Laserfiche Solution Contributed By: Irina Garner, HR Technician, Breckenridge Grand Vacations*

Breckenridge Grand Vacations manages four timeshare resorts in Breckenridge, CO. With 400 employees and a 50 percent turnover rate, the hiring process used to involve a great deal of paper. Here is how Laserfiche Forms made onboarding new hires a quick and painless process.




## Legacy Process

After a prospective employee accepted a job offer at Breckenridge Grand Vacations, the hiring manager had to:

- Fill out a lengthy new hire form in Microsoft Excel with all of the new hire's personal data and salary information.
- Submit a new helpdesk ticket to set the new employee up with all appropriate hardware and software, such as computer login and phone number.
- Register the employee for new employee orientation.

Hiring managers generally performed these steps at different times, so the people who needed the information frequently didn't receive it in a timely matter. The new hire form in particular had to be printed and driven around the organization's eight different locations through interoffice mail to be signed. It was then delivered to HR, where an employee manually entered all of the new hire's information into the HR system, only to find out that required information was missing or the form was not filled out correctly.

Here is what the old, cumbersome new hire form looked like:

					
<b>PAYROLL STATUS CHANGE FORM (PSCF)</b>					
You can type directly into this form.					
Complete, get all necessary approvals and submit to the Human Resources Department.					
Last Name, First Name					
		NEW HIRES ONLY		TERMINATIONS ONLY	
Social Security #				New Mailing Address	
Date of Birth				New Mailing Address	
Mailing Address				City, State, ZIP	
City, State, ZIP				Phone	
Phone				Eligible for Rehire*	
Jag worked* HH/DD/YYYY				Last Day worked*	
NEO date* HH/DD/YYYY				Exit Interview Date	
Scheduled Days and Shifts*				HH/DD/YYYY	
<b>CHANGES</b>					
Fill out ONLY the fields that are changing					
		FROM		TO (FILL OUT NEW HIRE INFO HERE*)	
Effective Date				Must be the 1st day of the payperiod (Sunday)	
Job Title					
Home Dept Name and #					
Job Location					
Schedule Changes					
Manager Change					
Position (Select One)		<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Seasonal <input type="checkbox"/> Casual		<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Seasonal <input type="checkbox"/> Casual	
Pay Type (Select One)		<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> Commission* <input type="checkbox"/> Piece Rate*		<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> Commission* <input type="checkbox"/> Piece Rate*	
		*Attach a Compensation structure		*Attach a Compensation structure	
Pay Rate					
		per hour		per year	
Date of Next Review		HH/DD/YYYY		The effective date of the next review is the 1st day of the payperiod following the Date of Next Review. The next year's payperiod dates are at <a href="http://www.grandvacations.com">www.grandvacations.com</a> under General Information/Pay Dates.	
Employee Type		<input type="checkbox"/> Non-exempt <input type="checkbox"/> Exempt		<input type="checkbox"/> Non-exempt <input type="checkbox"/> Exempt	
Reason for Change		<input type="checkbox"/> New Hire <input type="checkbox"/> Pay Change <input type="checkbox"/> Re-Hire <input type="checkbox"/> Transfer <input type="checkbox"/> Addtl dept <input type="checkbox"/> Other		<input type="checkbox"/> Discharge <input type="checkbox"/> End of Seasonal Job <input type="checkbox"/> Layoff <input type="checkbox"/> Resignation (attach letter of resignation)	
Resignation reason					
Comments, if necessary					

## Current Process

With the new process, the hiring manager simply fills out one Laserfiche form to perform all of the tasks listed above. Here is what this form looks like:

### New Hire Set Up Request

Notify HR and IT that an employee is starting

Manager ID\*

Manager Name

New Hire Last Name\*

New Hire First Name\*

New Hire Preferred Name

Start Day\*

All employees must start on M-F. Contact HR Director for exceptions. For all Spanish new hires contact the HR Technician.

Employee Type\*
☐ Full Time
☐ Part Time
☐ Casual
☐ Seasonal

Location\*

Location for Nametag

If differs from above:

Home Dept\*

Employee Title\*

Reports to\*

Schedule\*

List days and hours this employee will be working

Pay Type\*
☒ Hourly
☐ Salary
☐ Commission

Next Review Date\*
☐ 30 days
☐ 60 days
☐ 90 days
☐ 1 year\*

\*Other, explain in Comments

Comments

Enter comments below each additional department, if necessary.

Spanish Speaker\*
☐ No
☐ Yes

#### IT Section

You don't need to put in a separate helpdesk ticket. This will create the employee's accounts.

Needs\*

☐ Computer
☐ StoreTel Ext.
☐ Direct Line

☐ Work Email
☐ TSW Login
☐ TSW Personnel Title

☐ Shift Login
☐ NA

Model Employee Setup after \*

Provide the full name of a user to model this user after or type "None"

Comments for IT

Use this field to notify IT of any special instructions

Submitted By

Date of Manager Signature
09/23/2014

Approval

Approval Username

Second Approval

Second Approval Username

Third Approval

Third Approval Username

This form is created to be as user-friendly as possible so that the hiring manager only enters a minimal amount of information. Some of the most useful features of this form include:


- Drop-down fields that ensure the manager selects an answer that is appropriate to the question. For example, the Location field has a list of all of the available locations. The manager does not have to remember the proper spelling or name of a location.
- Field rules that guarantee the manager only fills out information that is pertinent to the particular new hire. For example, the compensation structure fields only appear if the manager selects the commission pay type.

The screenshot displays a section of a hiring form with several conditional fields. At the top, there are five rows, each starting with a 'Show' button and a dropdown arrow. The fields are: 'Compensation Structure', '(Attach\_Compensation\_structure)', 'Meetings Hourly Rate', 'Paid Time Off Hourly Rate', and 'Commission vs Hourly Rate'. Each field has a small '+' and 'x' icon to its right. Below these fields, there is a rule configuration section. It starts with 'When' followed by a dropdown set to 'Any', then 'of the following is true:'. Below this, there are three fields: 'Pay Type' (dropdown), 'Commission' (dropdown), and 'is checked' (checkbox). A '+' icon is to the right of the 'is checked' field. At the bottom left of the form section, there are '+' and 'x' icons.

- Database lookups that allow some of the information, such as the name of the hiring manager's supervisor, to be prepopulated directly from the employee database. This ensures that the form is routed to the correct people for review.



- Custom JavaScript applied to the Start Day field that ensures that the new employee starts work on the day of a new hire orientation (every Monday for English speakers and every Friday for Spanish-speakers). This eliminates the problem of a new hire starting on a Tuesday, and not attending the new hire orientation until the following Monday. Here is what this JavaScript looks like:

JavaScript 

Learn More

```

1 $(document).ready(function () {
2     $(".thisfieldreadonly input").prop("readonly", true);
3     getMondays();
4 });
5
6 function getMondays(){
7     var badMondays = [ '7/21/2014', '9/1/2014', '12/29/2014' ];
8     var mondays = new Array();
9     var maxWeeks = 12;
10    var d = new Date();
11    while(d.getDay() != 1){
12        d.setDate(d.getDate() + 1);
13    }
14
15    while(maxWeeks >= 0){
16        var m = (d.getMonth() + 1) + '/' + d.getDate() + '/' + d.getFullYear();
17
18        if(badMondays.indexOf(m) == -1){
19            mondays.push(m);
20            maxWeeks--;
21        }
22        d.setDate(d.getDate() + 7);
23    }
24
25    //FIND ELEMENT & SET VALUES
26    //var dd = document.getElementById("XXXX");
27    for(i=0;i<mondays.length;i++){
28        $("#Field224").append(new Option(mondays[i], mondays[i]));
29    }
30 }
31 }

```

- Read-only fields that ensure that some of the prepopulated data cannot be changed. For example, the three different approvers who need to review the form are automatically populated based on the employee ID of the submitter. Those fields are set as read-only so that the submitter cannot alter the chain of review.

Once the form is submitted, it goes through three different levels of approval (unless the first approver is one of the company's executives, in which case the other two approval levels are bypassed.) The reviewer is notified by email of a new hire form to review and can view and approve/reject this form directly in Laserfiche Forms. Alternatively, the reviewer can reply directly to the email with either "approve" or "reject" in the email body. Either action will move the form along in the process.

Here is what a sample email looks like:

**Subject:** A New Hire request has been submitted for your approval 488

You can perform this task via email by replying to this message with one of the following actions as the email body: Approve, Reject.

DEPARTMENT MANAGER submitted a New Hire Request for EMPLOYEE, NEW

Start Day: 10/13/2014

Employee Type: FULL TIME

Seasonal Job End:

Exempt/Non-Exempt:

Location: SKI TOWN OFFICE

Home Dept: ACCOUNTING - LOAN SERVICING HOURLY XX-XXX-X

Title: ACCOUNT MANAGER COMMUNICATIONS II

Pay Type:

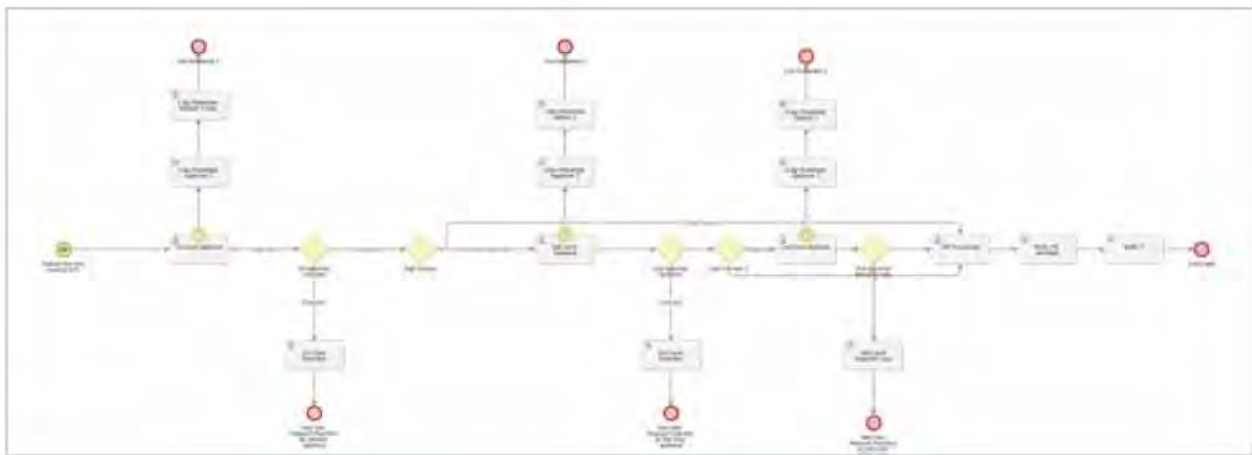
Hourly: CHECKED,

Salary: unchecked,

If the reviewer doesn't approve or reject the form in three days, he/she receives a reminder email. If at any point the form is rejected, an email is sent to the hiring manager and the process is terminated.

Once the form has been approved by all reviewers, the HR assistant is notified by email. Another email is sent to the IT helpdesk. The IT email notification contains all of the information the IT employee needs to set up the user in all systems.

Here is what the entire Laserfiche Forms business process looks like:



## Benefits of Laserfiche Forms

Automating the new hire process with Laserfiche Forms has resulted in the following benefits for Breckenridge Grand Vacations:

- The HR and IT departments receive information that is always correct, complete and timely so that everything is ready before the new hire's first day.
- The forms can be built by an HR technician, who can also make changes without having to wait for assistance from the IT department.
- Direct approval allows managers who travel between locations to approve new hire forms quickly from their email inbox without having to log into Laserfiche Forms.
- Employee information is more secure—there is no longer the possibility of a form being lost on the way to another location or accidentally viewed by an unauthorized person.





HIRING

# City of Mount Pearl, NL

**INDUSTRY:**

State and Local Government

**NUMBER OF EMPLOYEES:**

200-500

**HEADQUARTERS:**

Mount Pearl, Newfoundland  
and Labrador, Canada

*Laserfiche Solution Contributed By: Rick Dunphy,  
Information Technology Manager and Natalia Chebel,  
Records Officer, City of Mount Pearl*

The city of Mount Pearl hires as many as 25 temporary employees during its peak season each year. The recruiting process used to be tedious and paper heavy, but Laserfiche Workflow has changed the way the city works.



## Applications

Once a request to hire is submitted to Human Resources by the hiring manager, HR advertises the job either internally within the organization or externally, depending on the position. Normally there is an application deadline of one week for internal job postings and two weeks for external job postings.

The majority of applications are submitted by email while the rest are delivered either in person or by mail.

Previously, applications were kept in paper recruitment files that could contain as many as 500 pages. Now, they are either imported into Laserfiche through the Laserfiche Microsoft Outlook integration or scanned with Laserfiche Scanning.

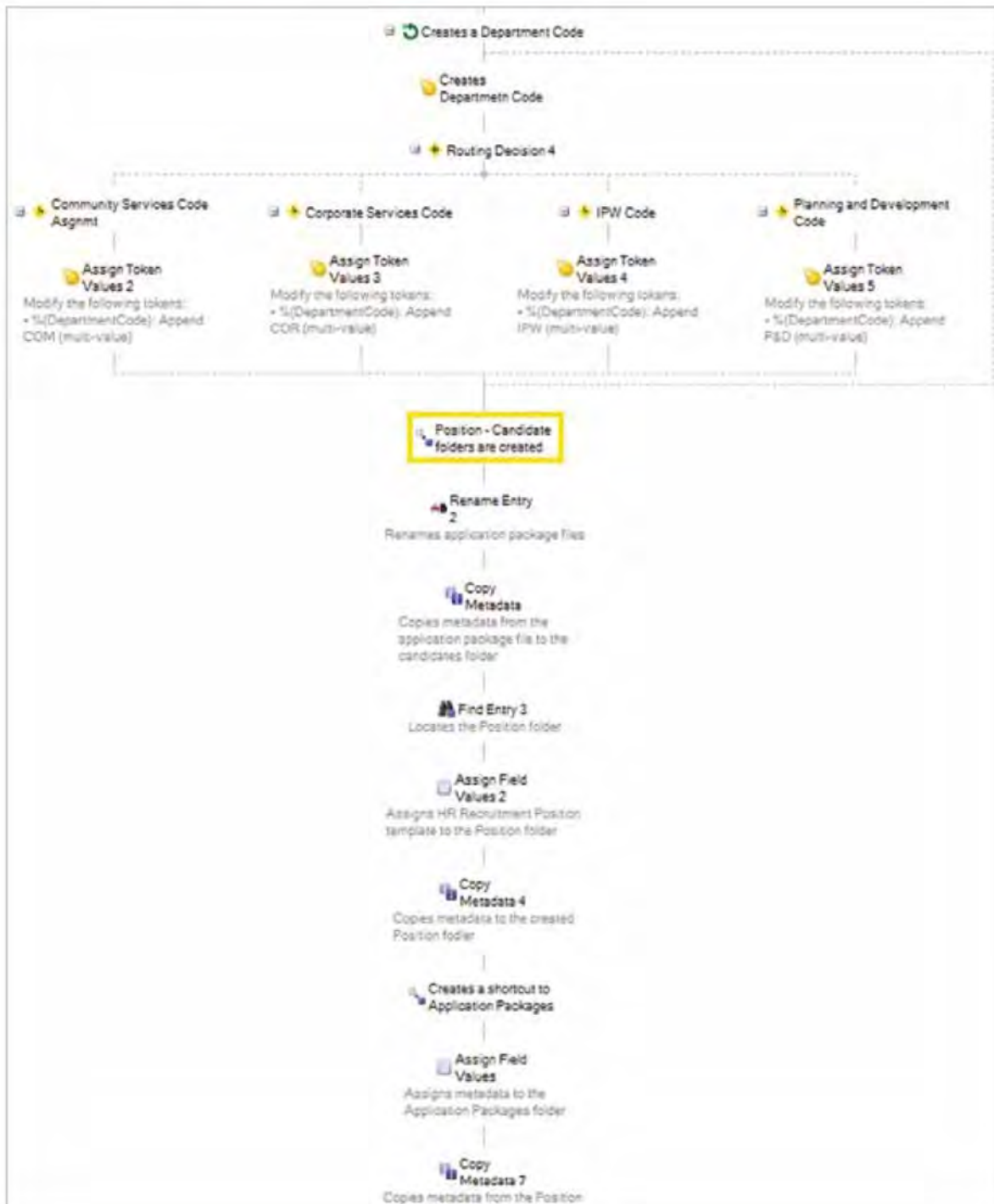
During the importing or scanning process, the HR administrative assistant fills out the Recruitment Candidate and Recruitment Position templates.

The screenshot shows a web-based form titled "Template: HR Recruitment Position". The form contains several fields for entering recruitment details:

- Competition Number:** 035
- Department:** Planning and Development
- Position:** Planning Technician
- Date Advertised (MM-DD-YYYY):** 9/11/13
- Position Contact:** Julia Schwarz
- Position Contact Number:** 748-1151
- Competition Type:** External
- Closing Date (MM-DD-YYYY):** 9/27/13
- Division:** (empty field)
- Hiring Committee:** nchebel@mountpearl.ca

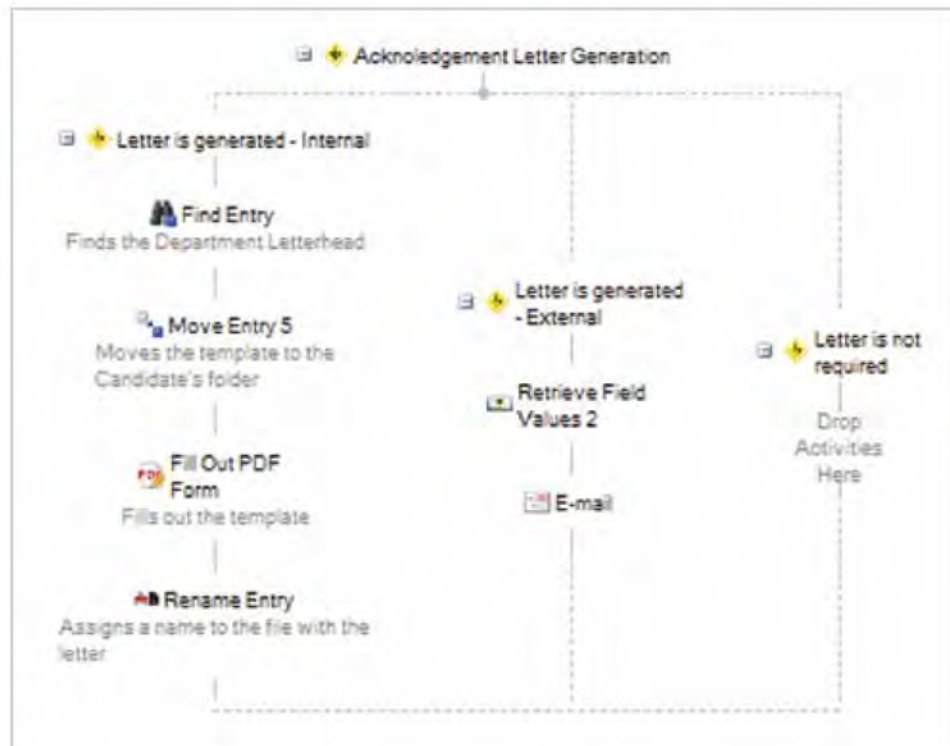
Each field has a dropdown arrow on the right. There are also navigation buttons (back, forward, search) on the right side of the form. A red 'X' icon is visible next to the Hiring Committee field.

Once an application is saved in Laserfiche and the template is populated, Laserfiche Workflow moves it to a brand new candidate folder and synchronizes the metadata between the document and folder. Here is what this part of the workflow looks like:



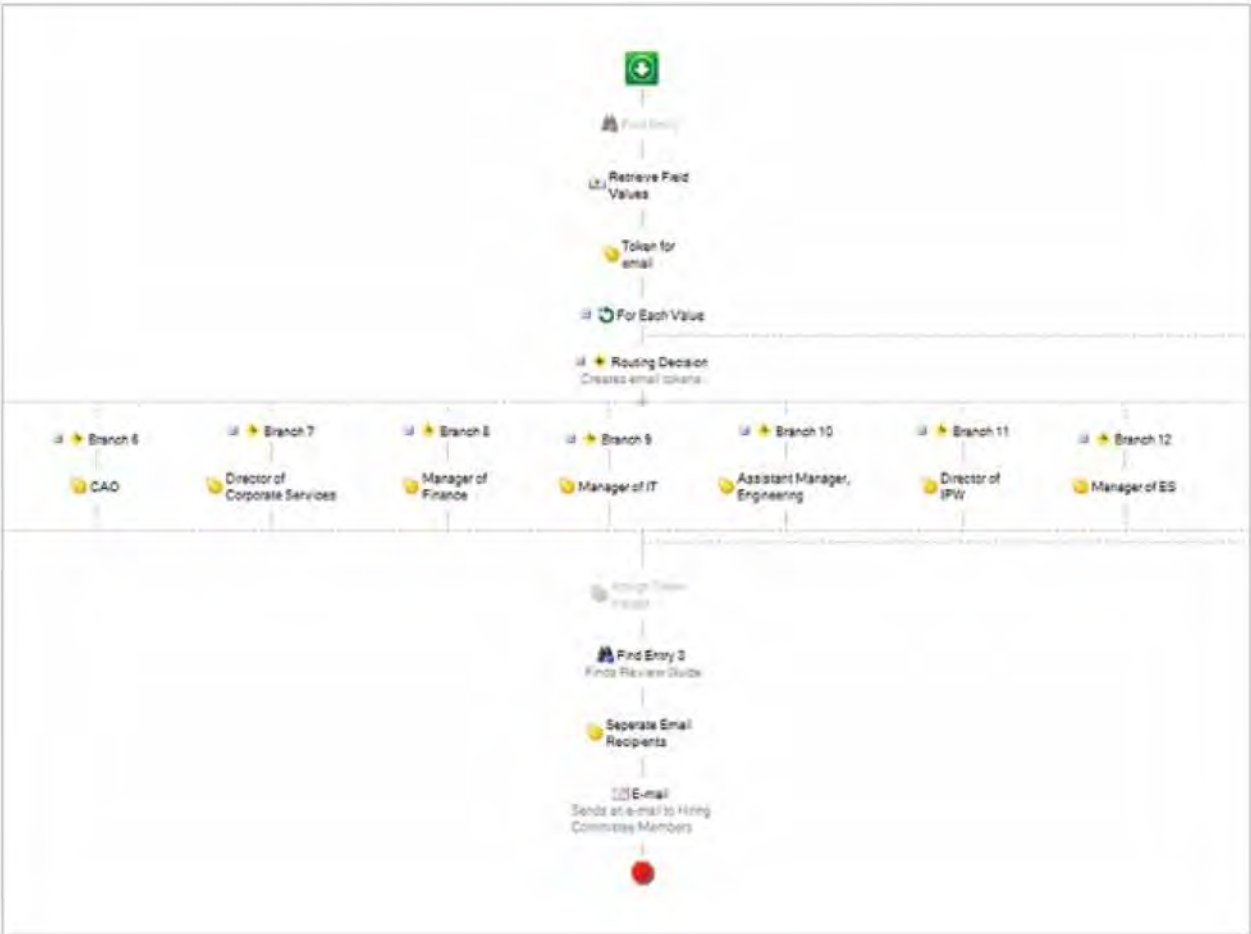
To help the hiring committee access the applications more conveniently, Laserfiche Workflow also creates a separate folder that contains only shortcuts to the application packages.

Laserfiche Workflow also sends an email confirmation to the candidate.



# Review

As soon as the system starts processing applications, the HR administrative assistant runs a business process that sends a notification to hiring committee members letting them know that they may start the review process.





The notification email contains a shortcut to the Application Packages folder and a brief guide on how to leave comments on the applications with metadata and annotations.



The day after the job posting closes, Laserfiche Workflow generates a list of applicants with their contact information, qualification notes and status (internal or external). This report is a PDF form that is filled out by Laserfiche Workflow based on the information contained in metadata fields.

City of Mount Pearl  
 5 Centennial Street  
 Mount Pearl, NL A1B 1G4  
 Phone: 709-748-1094; Fax: 709-748-1150

**Mount Pearl**

**APPLICANT LIST (PRIVATE & CONFIDENTIAL)**

COMPETITION POSITION: Planning Technician  
 DATE ADVERTISED: 9/11/2013  
 DEPARTMENT: Planning and Development  
 CONTACT PERSON: Julia Schwarz

INTERNAL: ☐ EXTERNAL: ☒  
 CLOSING DATE: 9/27/2013  
 DIVISION: Planning and Inspection Services  
 CONTACT #: 748-1151

#	Applicant Name	Qualifications/Notes	Interview		Interview	
			Yes	No	Date	Time
1	<b>Applicants' Names</b>					
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18	Doucet, Kalin					

Here is what this section of the workflow looks like:



At each step of the screening, members of the hiring committee make notes, either private or visible to other members. Private notes, useful for reminding the individual committee member about what he liked or disliked about a candidate, are made using sticky notes while public notes are made in the template fields directly.

**JOHN DOE**  
• City, State, ZIP • Phone Number • E-mail

---

**OBJECTIVE** innovative retail company

---

**EDUCATION**

UNIVERSITY OF MINNESOTA  
College of Design

- Bachelor of Science in Graphic Design
- Cumulative GPA 3.93, Dean's List
- Twin cities Iron Range Scholarship

City, State  
May 2011

*Sticky Note:* Seems to meet the requirements

Fields Tags Links

**Template:** HR Recruitment Candidate

Date Advertised (MM-DD-YYYY)  
10/08/2012

Received Date  
/ /

Competition Number  
001

Department  
Corporate Services

Position  
Administrative Assistant

Last Name  
Kot

First Name  
Olga

Applicant Type  
External

Generate Acknowledgement  
Yes

HR Comments






**Department Comments**

HR Review

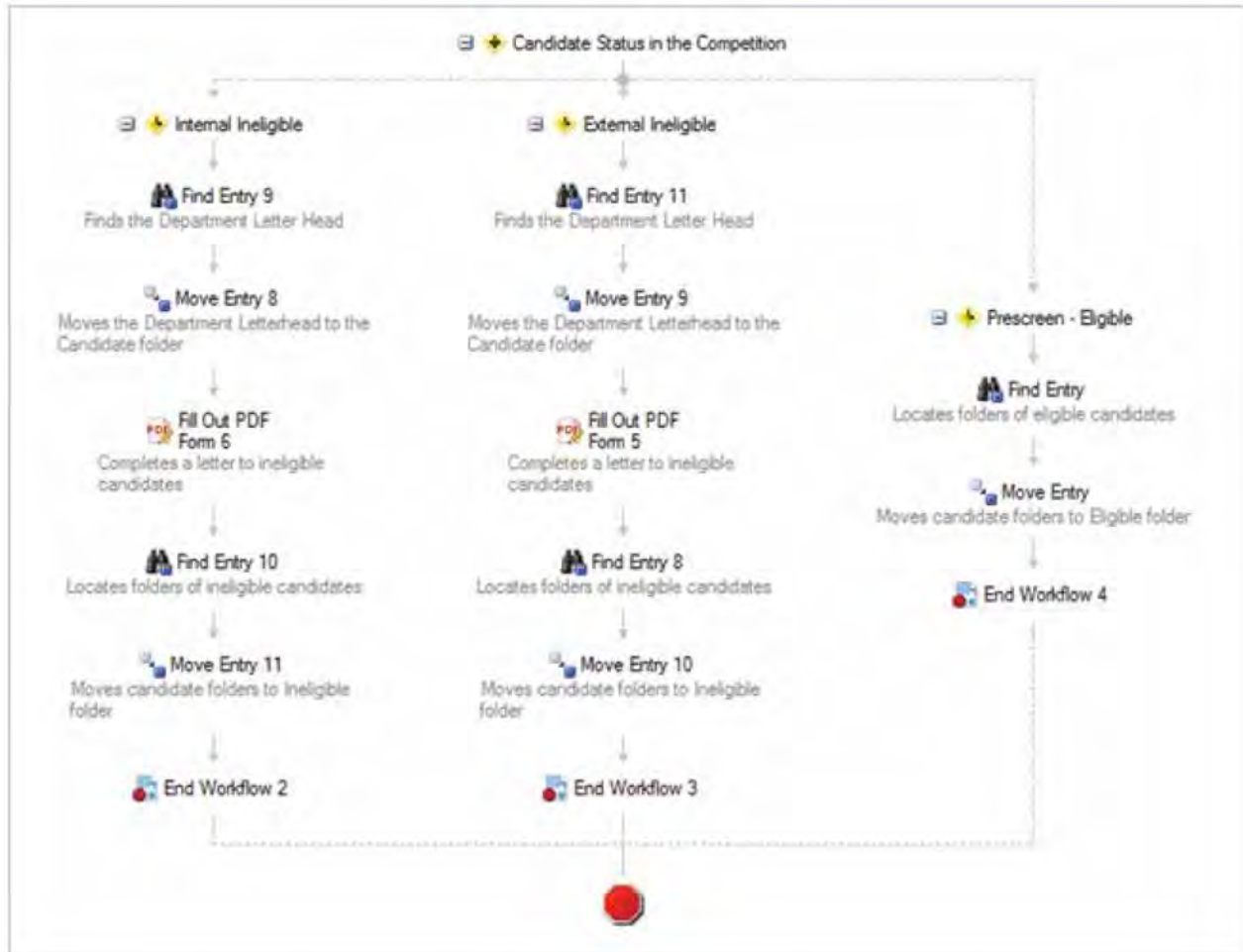
Department Review

Agreed-on Applicant Status

Once all of the members of the hiring committee make a decision about a particular candidate, they change the Agreed-on Applicant Status field to either eligible or ineligible. Candidate folders marked as eligible are moved to the Eligible folder while candidate folders marked as ineligible are moved into the Ineligible folder.

Name	
	1 - Competition File
	2 - Application Packages for Review
	3 - Ineligible
	4 - Eligible
	Applicant List - First Applied.pdf

Here is the section of the workflow that moves the files:



Throughout the process, Laserfiche Workflow generates acknowledgement letters to applicants at different stages of the recruitment process. For example, it creates and sends letters letting applicants know that they were identified as ineligible after a certain screening stage.

If several positions with the same title (i.e. lifeguard, summer student or laborer) are filled, Laserfiche Workflow also generates standard offer letters.



## Benefits of Laserfiche

Automating the recruitment process with Laserfiche has saved the city of Mount Pearl an estimated \$30,000 CAD annually after the first year of implementation. In addition, the city was able to:

- Optimize the screening process by allowing hiring committee members to work with electronic application packages, collaborate more efficiently by sharing notes on applicants, view applicants' status in the competition and receive notifications of applications pending review.
- Save time for the HR team by eliminating the need to print and assemble application files (which, in some cases, consisted of over 1,000 pages!).
- Avoid the grief associated with maintaining physical records—filing, re-filing, running out of space, retrieving, preparing records for disposition, etc.
- Standardize and speed up notifications and report generation.



HIRING

# Warmerdam Packing

**INDUSTRY:**

Commercial

**NUMBER OF EMPLOYEES:**

10-50 people

**HEADQUARTERS:**

Hanford, CA

**EXISTING LASERFICHE INTEGRATIONS:**

Famous Software


*Laserfiche Solution Contributed By: Russ Davidson, CFO and Maria Cabral, Office Manager, Warmerdam Packing; John Catano and Rory Quick, Appleby Co*

As one of the leading cherry producers in California, Warmerdam Packing hires 1,500-2,000 seasonal workers every year. The hiring and onboarding process requires completing a great deal of forms (e.g., the job application, I-9, W-4, etc.). Here is how Laserfiche makes HR onboarding completely paperless.

## Hiring Process

Warmerdam now uses Laserfiche Forms and Laserfiche Workflow to manage its hiring process. The job application is submitted through Laserfiche Forms. Computer stations at Warmerdam's job fairs allow applicants to fill out job applications in English or Spanish in person or they can apply at home at their convenience.

**Warmerdam Packing Application Form - English**  
 Para acceso a la forma en Español aga clic [aquí](#).


  
**Warmerdam Packing LP**

It is the policy of Warmerdam Packing to ensure equal employment opportunity without discrimination because of race, sex, religion, creed, age, color, national origin, marital status, disability or veteran status. The position you are applying for is a seasonal position. The employment duration may be on a day to day basis.

If you are unable to complete the form in one sitting, please see option on bottom of form to save form and continue at a later time.

Are you over 18 years of age? <sup>\*</sup> ☒ yes

Positions Desired(Click Add another position to add another job type.)

**Position <sup>\*</sup>**

Sorter

[Add another position](#)

**Desired Shifts <sup>\*</sup>**

☐ Day  
☐ Night  
☐ Other

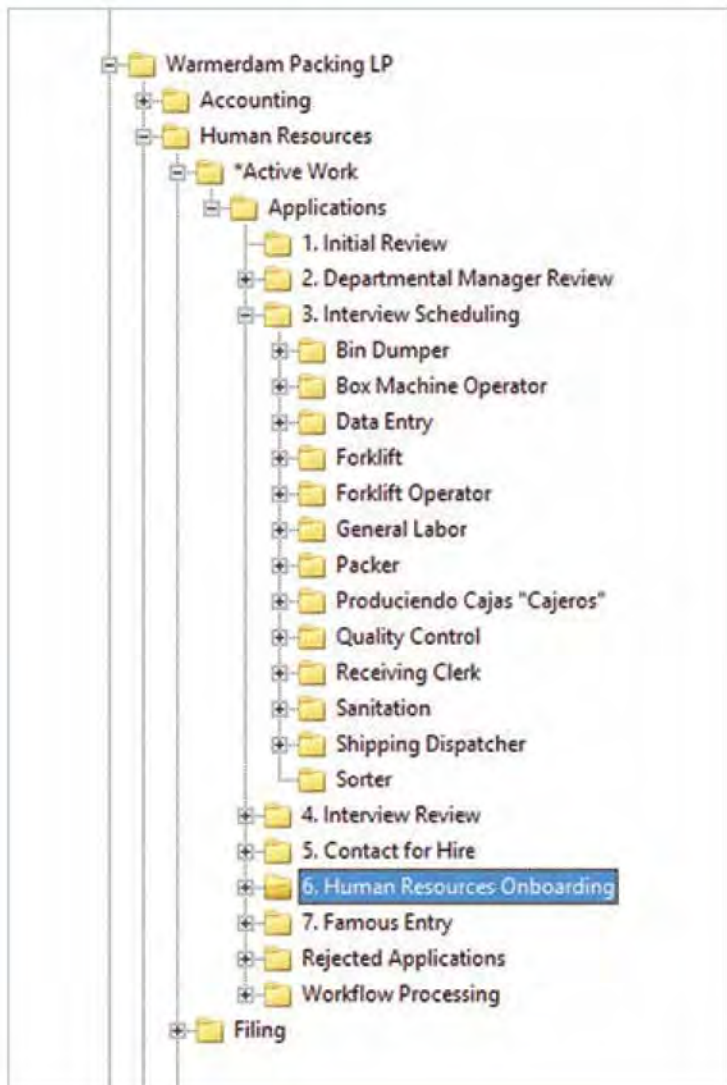
Personal Information

**First Name <sup>\*</sup>**

**Middle Name**

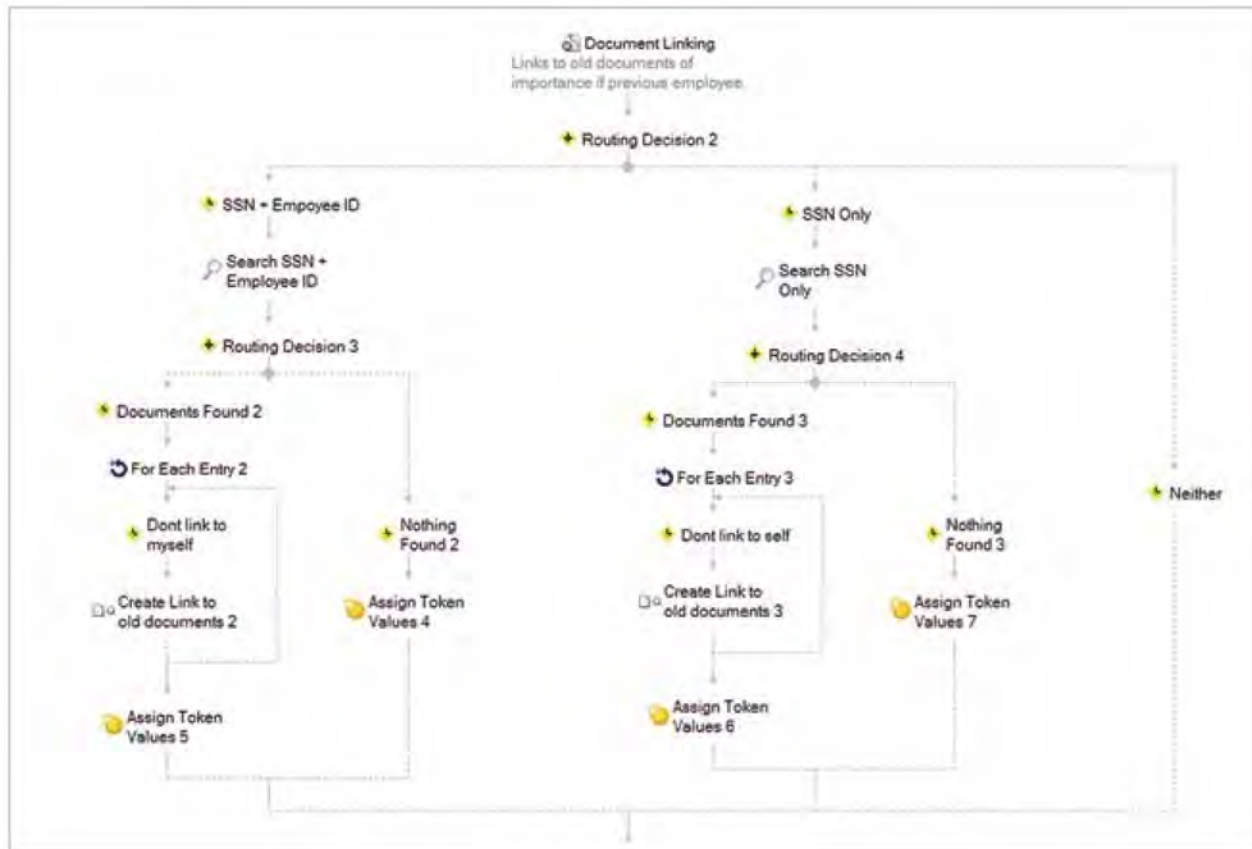


The folder structure in the Laserfiche repository corresponds with the different steps of the process. As the job application moves from step to step, Laserfiche Workflow automatically moves it to the next folder.

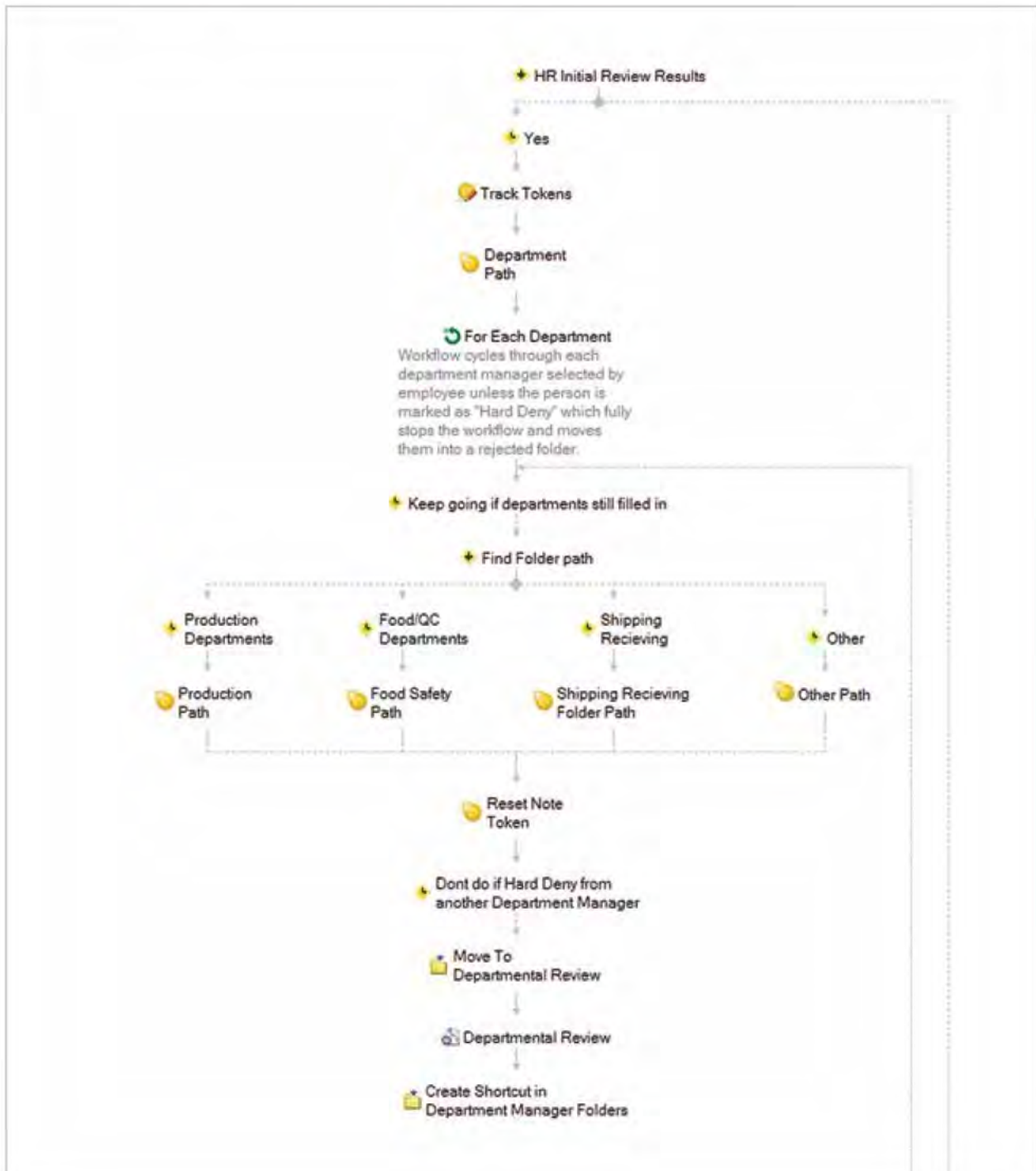




Once the application is submitted, Laserfiche Workflow searches the repository to see if an employee with the same social security number and/or employee ID already exists. If so, it adds a link to the old application in the new application's metadata. Here is the section of the workflow that searches for and links those documents:



The application is automatically routed to the Initial Review folder, where an HR employee performs the first review. After the initial review, the application automatically goes to the correct location based on job title. A shortcut is also created in the department manager's folder.




The manager decides whether to reject the applicant or move him to the next step. If the applicant has been previously employed by Warmerdam and the manager approves him, the applicant is moved to the Contact for Hire folder and is hired immediately. Otherwise, the workflow moves the new applicant to the interview scheduling step.

If the interview is successful, Laserfiche Workflow moves the application to the Contact for Hire folder. The applicant's information is then entered into a SQL database.

Rejected applications are moved to the Rejected Applications folder for archival.

## Onboarding Process

On the employee's first day, the HR employee opens the HR Onboarding form. Upon entering the new employee's social security number, the majority of the form is automatically populated with information stored in the database. Here is what this form looks like:

**Warmerdam Human Resources Onboarding**


**Language**
☐ English  
☐ Spanish

**SSN**

**Employee Information**


**Gender**
☐ Male  
☐ Female

**First Name**

**Middle Name**

**Last Name**

**Date of Birth**



**Telephone Number** 123-456-5789

**Email**

**Address**

**City**

**State**

**Zipcode**

The HR employee enters additional information into the form, such as the new employee’s tax information.

Employment Information

Employee ID

Start Date

2/25/2015

Wage

\$

Cost Centers

Description	Cost Center	Job Code	Comp Code
<div></div>	<div></div>	<div></div>	<div></div>

I-9 Information

Resident Status

☐ Citizen

☐ Noncitizen national of the US

☐ Lawful permanent resident

☐ Alien authorized to work

I-9 Documents Provided

☐ Passport

☐ Other List A Document

☐ Drivers License

☐ SSN Card

Tax Information

Exempt Status

☐ I am exempt

W4 Status

☐ Single

☐ Married

☐ Married(single rate)

Total Number of Allowance Claimed

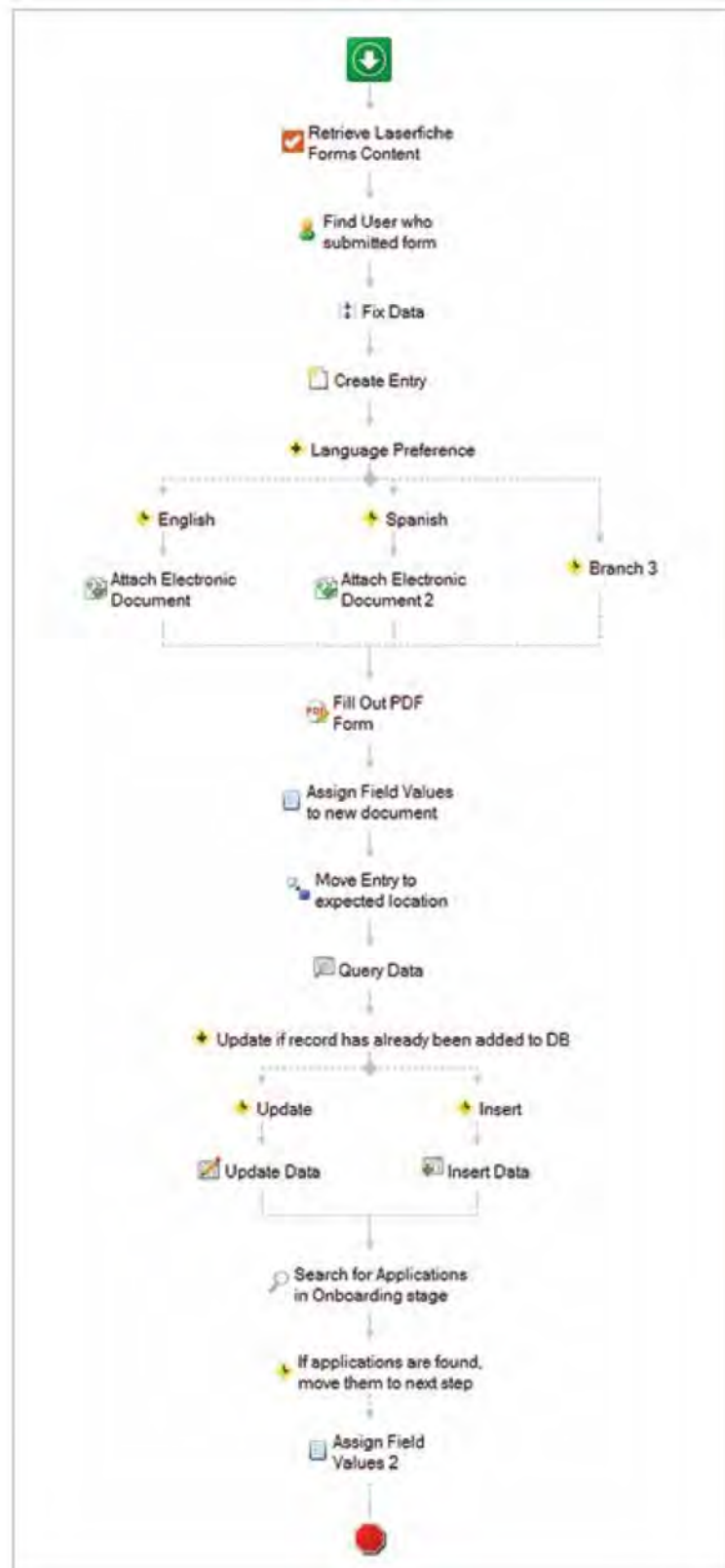
Additional amount withheld.

\$

Submit



Once the form is submitted, Laserfiche Workflow takes the information from the form and automatically creates and populates PDF versions of W-4 and I-9 forms. Here is what this workflow looks like:



The new employee reviews the information in the forms and signs them on a Topaz signature pad. Here is an example of a pre-filled W-4 form with the employee's signature visible.

Form **W-4** **Employee's Withholding Allowance Certificate** OMB No. 1545-0047 **2015**

Department of the Treasury Internal Revenue Service

1 Your first name and middle initial: **John Doe** 2 Your social security number: **111-11-1111**

3 Home address (Include apt. #, street or rural route, city or town, state, and ZIP code): **2828 North Wishon Fresno, CA 93704**

4 ☒ Single ☐ Married ☐ Married, but without a higher single rate. **Note.** If married, but legally separated, or spouse is a nonresident alien, check the "single" box. **5** If your last name differs from that shown on your social security card, check here. You must call 1-800-872-1213 for a replacement card. **6**

5 Total number of allowances you are claiming from line 4 above or from the applicable worksheet on page 2: **6** 6 Additional amount, if any, you want withheld from each paycheck: **6.50**

7 I claim exemption from withholding for 2015, and I certify that I meet both of the following conditions for exemption:  
• Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and  
• This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.  
If you meet both conditions, write "Exempt" here: **Exempt**

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature: *John Doe* Date: **1/27/2015**

8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.) 9 Office use only 10 Signature identification number (SIN)

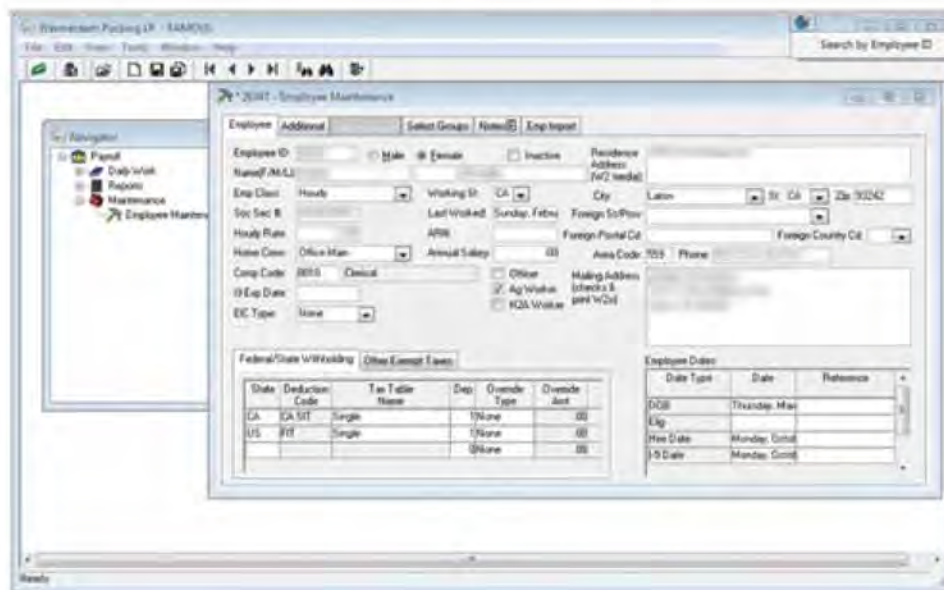
For Privacy Act and Paperwork Reduction Act Notice, see page 2. Call toll free 1-800-829-1040 Form **W-4** (2015)

At the end of the day, another workflow populates the Famous line-of-business application with all of the information relating to the employees hired that day.



## Laserfiche Connector

Once the employee's information has been imported into Famous, Laserfiche Connector is used to link this information to the employee's documents in Laserfiche by employee ID. This allows Warmerdam HR staff to quickly pull up the employee's documents directly from their record in Famous, instead of having to perform a separate manual search in Laserfiche.



## Benefits of Laserfiche

Implementing Laserfiche at Warmerdam Packing has resulted in the following benefits:

- The process of sorting through and reviewing all incoming applications to actual hire could take a team of people three weeks to complete. The new process, from the receipt of the online application to hire, takes approximately two hours.
- Since 75 percent of all applicants are rehired, finding their old files to check if they had been previously employed would take a long time. Now all the details are accessible in one place.
- The only paper that is generated during the HR hiring and onboarding process is the employee handbook. Everything else is stored in Laserfiche.
- Laserfiche Connector allows HR staff to pull up an employee's record in Famous and see all Laserfiche documents related to the employee without having to perform a separate search.







# ONBOARDING AND BENEFITS ENROLLMENT

Once your employees have been hired, the process of onboarding begins. Paper onboarding processes require pages after pages of printing. The resulting documents are bulky and costly. Now, onboarding packets can be created electronically and signed digitally, making them more convenient and less expensive to produce.

This section demonstrates how different organizations have digitized and streamlined the onboarding process, saving time for the HR department and making the process easier for new hires.

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ONBOARDING AND BENEFITS ENROLLMENT

# Accelerated Information Systems

**INDUSTRY:**

Commercial

**NUMBER OF EMPLOYEES:**

10-50 people

**HEADQUARTERS:**

Hicksville, NY


*Laserfiche Solution Contributed By: Patrick N. Leon,  
Marketing Manager, Accelerated Information Systems*

Laserfiche reseller Accelerated Information Systems (AIS) is a lean operation with less than ten employees. With no dedicated human resources department, the organization needed to automate new employee onboarding to ensure other employees could spend the maximum amount of time with clients.

Here is how AIS automated the onboarding process with Laserfiche Forms.

## HR Onboarding

On the new employee's first day of employment, he or she is assigned an employee ID and fills out the "Employee Details for Database" collection form.



### New Employee Details

Employee ID \*

Please fill out this field.

Domain User Name \*

AISWWdefault

Salutation

First Name \*

Middle Name

Last Name \*

Preferred Name \*

Date of Birth \*

Title \*

Department \*

Manager \*

Extension \*

Cell Phone Number

Alternate Phone

Work E-mail \*

Personal E-mail

Home Address \*

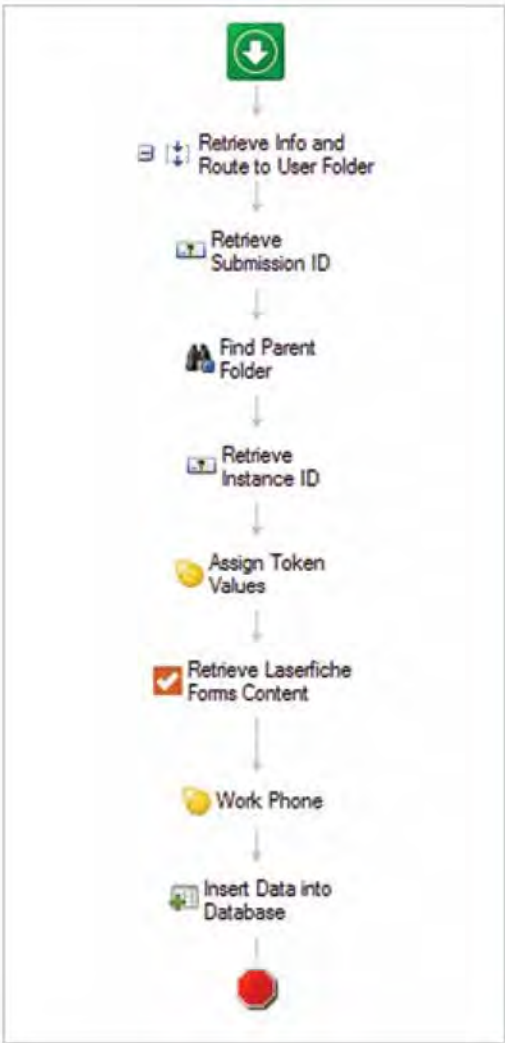
Street Address

Address Line 2



After submission, Laserfiche Workflow saves the form in the employee's folder in Laserfiche. If the folder isn't there, Laserfiche Workflow creates it.

Laserfiche Workflow also inserts all of the data into the employee database. Here is what this workflow looks like:



This is how the Insert Data activity is configured:

Properties

Insert Data into Database ?

Activity Name

Insert Data into Database

Activity Description

Inserts the specified record into the selected data source.

Data Source

LRefDB

Database Type: Sql (Direct)

Database:

Authentication: Windows Authentication

Data to Insert

Select the table and then configure the values to insert in it.

Employees

Column	Value
Work_Address_State	%{RetrieveLaserf...}
Work_Address_Postal	%{RetrieveLaserf...}
Work_Address_Country	%{RetrieveLaserf...}
Domain_User_Name	%{RetrieveLaserf...}
Department	%{RetrieveLaserf...}
Manager	%{RetrieveLaserf...}

Set Values...

Query Options

☐ Specify a custom timeout

30

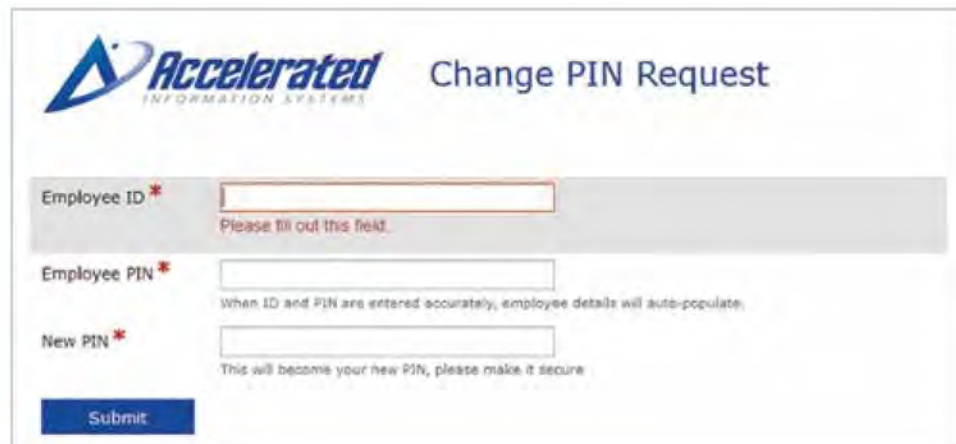
>

second(s)



As part of the onboarding process, a temporary personal identification number, (PIN) 9999, is assigned to the new employee. This PIN is used to pre-populate employee data on other forms, such as vacation requests.

Every new employee must fill out the "PIN Change Form" as part of the onboarding process to create a new PIN that will be secure and known only to them.

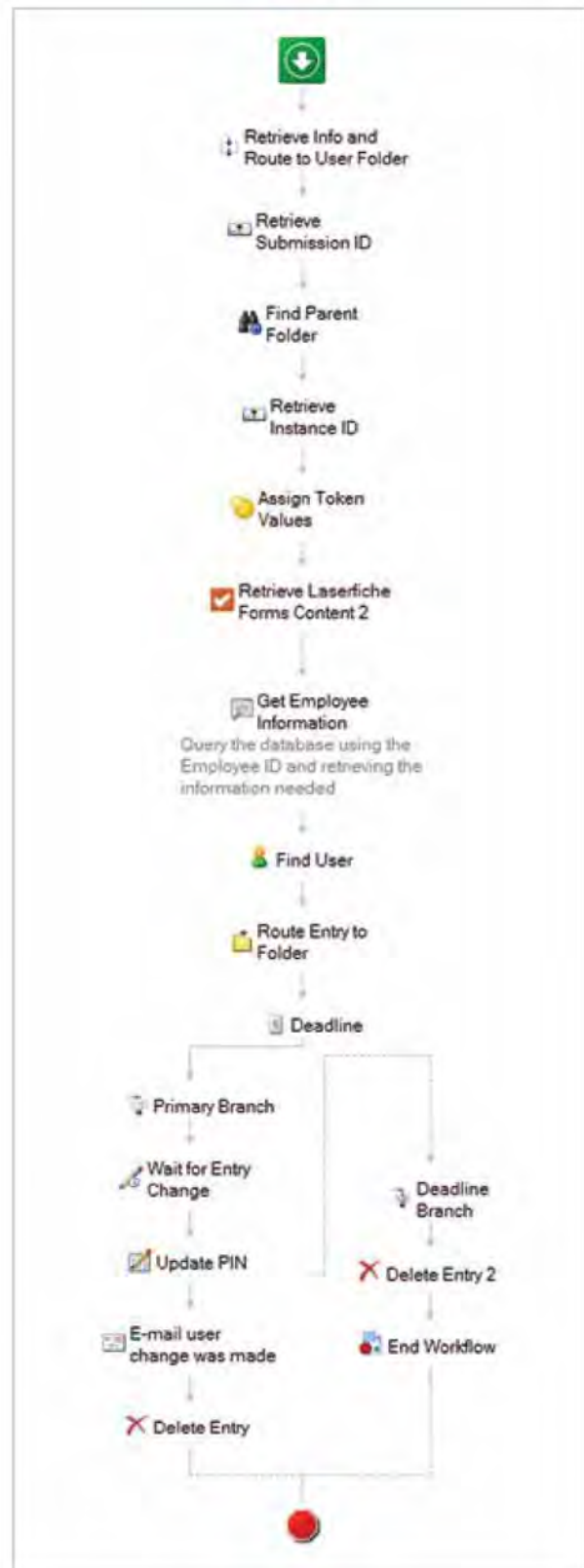


The image shows a web form titled "Change PIN Request" from Accelerated INFORMATION SYSTEMS. The form contains three input fields: "Employee ID" with a red asterisk and a red border, "Employee PIN" with a red asterisk, and "New PIN" with a red asterisk. Below the "Employee ID" field is a red error message "Please fill out this field.". Below the "Employee PIN" field is a note "When ID and PIN are entered accurately, employee details will auto-populate:". Below the "New PIN" field is a note "This will become your new PIN, please make it secure". A blue "Submit" button is at the bottom left.

Once the form is submitted, Laserfiche Workflow routes it to the new employee's folder in Laserfiche. An email is sent to the new employee asking him to confirm his desire to change the PIN by digitally signing the document.

- If the employee signs the form within one day, the new PIN is updated in the database and the employee is notified of a successful PIN change.
- If the employee doesn't sign the form within one day, the PIN is not changed, the PIN change request form is deleted and the workflow ends.

The one-day deadline is imposed to make sure that the default PIN is changed immediately for security purposes. Signing the form digitally allows the employee to make sure that he knows how to use Laserfiche digital signatures and that the digital signatures are properly set up. Here is what this workflow looks like:



## Filling Out Other Forms

The employee uses a combination of Employee ID and PIN for all future forms, like a vacation request or purchase order.

- Every form has an “Employee Details” collapsible section that is populated when the “Auto fill” button is pressed.
- For security, the PIN field is hidden right after the information is auto-filled.

## Benefits of Laserfiche

Implementing Laserfiche at Accelerated Information Systems has resulted in the following benefits:

- Onboarding employees is quick and easy. Employee data is automatically saved in the database, eliminating the need for employees to enter the same data into different systems.
- Using an Employee ID and PIN makes filling out other forms easy. Information is always accurate and forms are completed properly.
- The onboarding process acts as a demonstration of Laserfiche solutions for new employees. Employees learn how to use Laserfiche Forms and digital signatures.



## ONBOARDING AND BENEFITS ENROLLMENT

# City of Elgin, IL

**INDUSTRY:**

State and Local Government

**NUMBER OF EMPLOYEES:**

500-1,000

**HEADQUARTERS:**

Elgin, IL

**EXISTING LASERFICHE  
INTEGRATIONS:**

Sungard NaviLine

*Laserfiche Solution Contributed By: Jeff Massey, Chief  
Technology Officer, City of Elgin, IL*

Located 35 miles northwest of Chicago and home to over 110,000 residents, the city of Elgin, IL, employs 850 people. The city recently implemented a Laserfiche system to take benefits open enrollment for its employees completely paperless.



Prior to implementing Laserfiche, employees were required to select their medical insurance benefits by filling out a five-page paper packet, which had to be completed even if no changes were being made. Once forms were received, they had to be manually reviewed. Changes were then manually entered into the SunGard NaviLine payroll system as well as the insurance provider's system. This paper-based process took 400 hours of human resources staff time to complete.

Using Laserfiche, the city automated both forms processing and data entry into NaviLine, cutting 350 hours of labor.

"Laserfiche provides real value to the city that results in hard dollar savings for the entire organization," said Jeff Massey, Chief Technology Officer at the city of Elgin. "Within the first year of deployment, Laserfiche provided a positive ROI. The workflow improvements provided staff time benefits almost immediately."

Here is how Laserfiche Forms and Laserfiche Workflow automated the city of Elgin's benefits open enrollment process.

## New Process

Once a year, all qualified city of Elgin employees receive an email with open enrollment instructions and a link to the form in Laserfiche Forms. The employee then clicks the link to open the form.

15% Managers Insurance Options for 2015 Plan Year						
<p><b>NOTE:</b> This form is only for managers who were hired prior to 3/1/16. If this does not apply to you, please contact HR. (mailto:elginhr@cityofelgin.org?subject=Open%20Enrollment%20Question)</p> <p>PLEASE CAREFULLY READ THE EMAIL ACCOMPANYING THIS FORM BEFORE COMPLETING. YOU MUST PROVIDE ANSWERS IN ALL SECTIONS OF THE FORM. A, B, C, D, WHETHER OR NOT YOU ARE ELECTING COVERAGE. DETAILED BENEFIT INFORMATION IS AVAILABLE IN THE HR SECTION OF THE INTRANET (http://www.cityofelgin.org/index.aspx?nid=742).</p> <p>IF YOU HAVE QUESTIONS ABOUT YOUR INSURANCE OPTIONS OR ABOUT COMPLETING THIS FORM, please contact HR. (mailto:elginhr@cityofelgin.org?subject=Open%20Enrollment%20Question)</p> <p><b>INSTRUCTIONS:</b> Information on this form will fill in automatically if you do the following:</p> <ol style="list-style-type: none"> <li>1) In the Last Name field, enter your last name in UPPER CASE EXACTLY as it appears on your paystub/paycheck.</li> <li>2) In the Social Security Number (SSN) field, enter the last 4 digits of your SSN.</li> <li>3) Click the Auto Fill button. The rest of the personal information fields will populate automatically.</li> <li>4) Verify that the information is correct and contact HR if any changes are required.</li> </ol> <p>Fields with asterisks (*) are required to be completed.</p> <p>All dates should be entered with no spaces as year first (4 digits), then month (2 digits), then day (2 digits): YYYYMMDD. Example: Date of March 9, 1979 should be entered as: 19790309</p>						
Date		Plan Year Start				
11/09/2015		20150301				
LAST NAME*	SSN - Last 4 digits of SSN*	First Name*	Middle Initial	Birth Date	Gender*	Hire Date
MADGEY USE UPPER CASE	<input type="text"/>	JEFFERY	J			
		<p>Enter last 4 digits only; then click "AutoFill" if your information does not display in these fields after clicking "AUTOFILL" please contact HR before proceeding</p> <p>Please fill out this field.</p>				
Street Address*		Apt #, Condo #, etc.	City*	State*	Zip Code*	
<input type="text"/>						
Please fill out this field.						
Email Address*		Home Phone Number		Cell Phone Number - Optional		
<input type="text"/>		<input type="text"/>		<input type="text"/>		
				If you wish to provide a cell phone number, enter it here.		
BEFORE PROCEEDING, PLEASE VERIFY THAT ALL INFORMATION ABOVE IS CORRECT. TO REPORT ANY ERRORS, PLEASE CONTACT HR. *						

Employees select their benefits by filling out a Laserfiche form

Once the employee enters his last name and last four digits of his social security number, Laserfiche Forms auto-populates the remaining demographic fields by performing a lookup into NaviLine.

The screenshot displays the 'Available Sources' configuration window in Laserfiche Forms. At the top, it shows '15% Managers Insurance Opt...' and a 'Save' button. Below this, a message states: 'Information can be retrieved from an external database and entered into form fields. [Learn more](#)'.

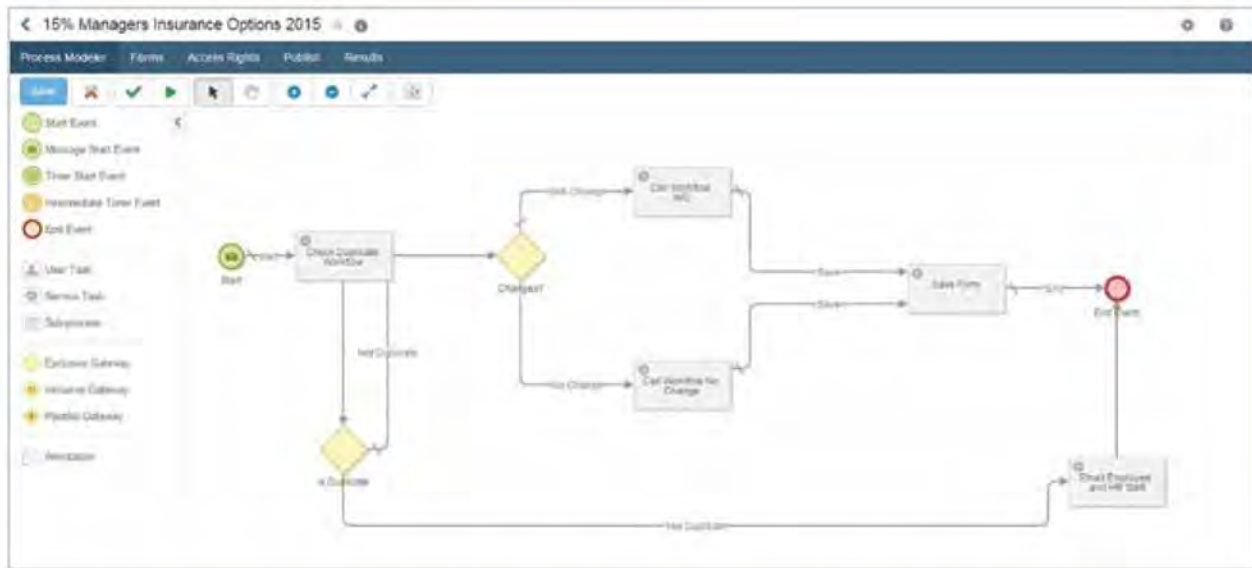
The main configuration area is titled '1 Available Sources' and includes a dropdown for 'VMSQL1', a 'Stored Procedure' dropdown, and a 'Name' field containing 'isp\_1FForms.lookup'. Below this, a table maps form fields to database columns:

Form Field	Database Column
Use LAST NAME	value for 'Lname'
Use SSN - Last 4 digits of SSN	value for 'L4ssn'
First Name	PRFNAME
Middle Initial	PMIDIT
Birth Date	BDOY
Gender	gender
Hire Date	hireDate
Street Address	addr1
City	city
Zip Code	zip
Email Address	email

At the bottom left, there are two buttons: 'Add new' (green) and 'Delete new' (red).

*Laserfiche Forms looks up the employee's demographic information in the database based on the employee's name and last four digits of the social security number*

The employee selects the appropriate dental, health and vision coverage. He can also select "No Change" in any of those sections. Once the form is completed and submitted, Laserfiche Workflow takes over.



The Laserfiche Forms Process Diagram shows which workflow to launch depending on whether the employee indicated changes to benefits



Laserfiche Workflow:

- Extracts all data from the form
- Inserts this data into a SQL database
- Updates the SQL database with the appropriate codes in order to simplify uploading to NaviLine

Once the workflow finishes running, Laserfiche Forms saves the form in the employee's folder in Laserfiche. If "No Change" is selected for all sections, there is no further review necessary and the form is immediately saved in the employee's Laserfiche folder.



*Laserfiche Workflow inserts new benefits enrollment data into NaviLine*

A SQL reporting service runs daily on the SQL database and generates a CSV summary of all submitted information. This report is emailed to the HR department which can track the submissions as they come in and quickly contact the necessary employees if changes or corrections are needed.

At the end of the month, NaviLine imports the CSV file and updates employee records with the new benefits enrollment information so that the employees' pay can be adjusted accordingly.

Another SQL stored procedure runs monthly to produce a data file with all benefits enrollment information. This report is automatically saved to the benefit provider's FTP site so that it can update its records.

## Benefits

Implementing Laserfiche at the city of Elgin has resulted in the following:

- HR staff saves 350 hours of labor by automating both forms processing and data entry into NaviLine. This equates to about \$15,000 in savings.
- The city of Elgin saves an additional \$15,000 in legacy support costs from the previous document management software that is no longer in use.
- Other departments save \$30,000 in storage and retrieval costs.



ONBOARDING AND BENEFITS ENROLLMENT

# Methodist Healthcare Ministries

**INDUSTRY:**  
Healthcare

**NUMBER OF EMPLOYEES:**  
200-500

**HEADQUARTERS:**  
San Antonio, TX

*Contributed by: Pete Otholt, Technical Services Manager,  
Methodist Healthcare Ministries*

Before a new employee can start working at Methodist Healthcare Ministries, he must first be assigned a computer and phone and given access to all the appropriate programs he will need. In order to simplify this process, and make sure that everything is set up before the employee's first date, Methodist Healthcare Ministries uses Laserfiche Workflow.

## The New Process

The process starts in the HR department. Once a new employee is hired, an HR assistant creates a new, blank document in Laserfiche and appends the HR New User template.

The screenshot shows a web-based form titled "Template: HR-New User". The form is organized into sections. The first section is "Workflow Status" with a dropdown menu. The second section is "New User Form Section 1" with a default value of "To be Completed by HR". The third section contains several required fields: "Submitter Name (required)" with a default of "Regina Garcia", "Submitter Email (required)" with a default of "RGarcia1@mhm.org", "Hiring Manager Name (required)", and "Hiring Manager Email (required)". The fourth section contains "Date" and "Date of Hire" fields, both with date pickers. The fifth section contains "Last Name", "First Name", and "Job Title" fields. The sixth section contains "Position Type", "Location", and "Department" dropdown menus. The seventh section contains "Reports To" and "Supervises (if applicable)" fields. Each field has a right arrow button next to it.

**Template:** HR-New User

**Workflow Status**

**New User Form Section 1** Default: To be Complet...

To be Completed by HR

**Submitter Name (required)** Default: Regina Garcia

Regina Garcia

**Submitter Email (required)** Default: RGarcia1@mhm.org

RGarcia1@mhm.org

**Hiring Manager Name (required)**

**Hiring Manager Email (required)**

**Date**

/ /

**Date of Hire**

/ /

**Last Name**

**First Name**

**Job Title**

**Position Type**

**Location**

**Department**

**Reports To**

**Supervises (if applicable)**



The HR assistant fills out the first section of this template with employee information such as the name, date of hire, department and hiring manager. As soon as this metadata is entered and the changes are saved, Laserfiche Workflow starts the new user onboarding process.

- The entry is renamed and routed to the Hiring Manager folder in Laserfiche. The hiring manager is notified by email that he has a new user request to fill out.
- The manager has one day to fill out his section of the template, which includes questions such as whether the employee needs a departmental cell phone, what email distribution groups should the employee be included in and whether he needs access to the building alarm code.

The screenshot shows a form titled "To be Completed by Hiring Manager" with the following fields and controls:

- Departmental Cell Phone**: A text input field with a dropdown arrow on the right.
- USB Air Card**: A text input field with a dropdown arrow on the right.
- Email Access**: A text input field with a dropdown arrow on the right.
- Building Alarm Code**: A text input field with a dropdown arrow on the right.
- Office Phone Ext**: A text input field with a right-pointing arrow button on the right.
- Distribution Groups**: A text input field with a dropdown arrow on the right.
- Additional Software, ex. Laserfiche**: A text input field with a right-pointing arrow button on the right.
- Access to Printers (List Printers)**: A text input field with a right-pointing arrow button on the right.
- Hiring Manager Action**: A text input field with a dropdown arrow on the right.

- To signify that all the information has been filled out, the hiring manager updates the value of the Hiring Manager Action field to Complete. If he does not do this in one business day, he receives a reminder email.



- Once the hiring manager fills out the appropriate information, Laserfiche Workflow generates and sends an email to the IT helpdesk, which creates a new helpdesk ticket. This ticket contains all of the information filled out by both HR and the hiring manager.
- The entry is then routed to the IT folder and IT is notified of pending work.
- An IT technician sets up the new employee in all the requested systems and fills out the IT portion of the template with information such as the employee's assigned computer password, cell phone number and computer type.

**To be Completed by IT&S**

NextGen Access

MHM User Name

MHM Email Address

Temporary Password

Cell Phone Number

Cell IMEI#

Cell HEX#

USB Aircard Serial#

Desktop or Laptop

PC Make

PC Model

PC Serial#

IT Action

- When finished, the IT technician updates the IT Action field to Completed.
- If the employee needs access to the NextGen electronic medical records system, the entry is routed to Health Informatics, which creates the new user account and populates the last section of the template.
- When Health Informatics updates the Health Informatics Action field to Complete, the entry is routed to the HR\Completed User Forms folder for storage and the HR assistant is notified of the completed process by email.

PC Model

PC Serial#

IT Action

New User Form Section 4 Default: To be Complet...

**To be Completed by Health Informatics**

NextGen Username

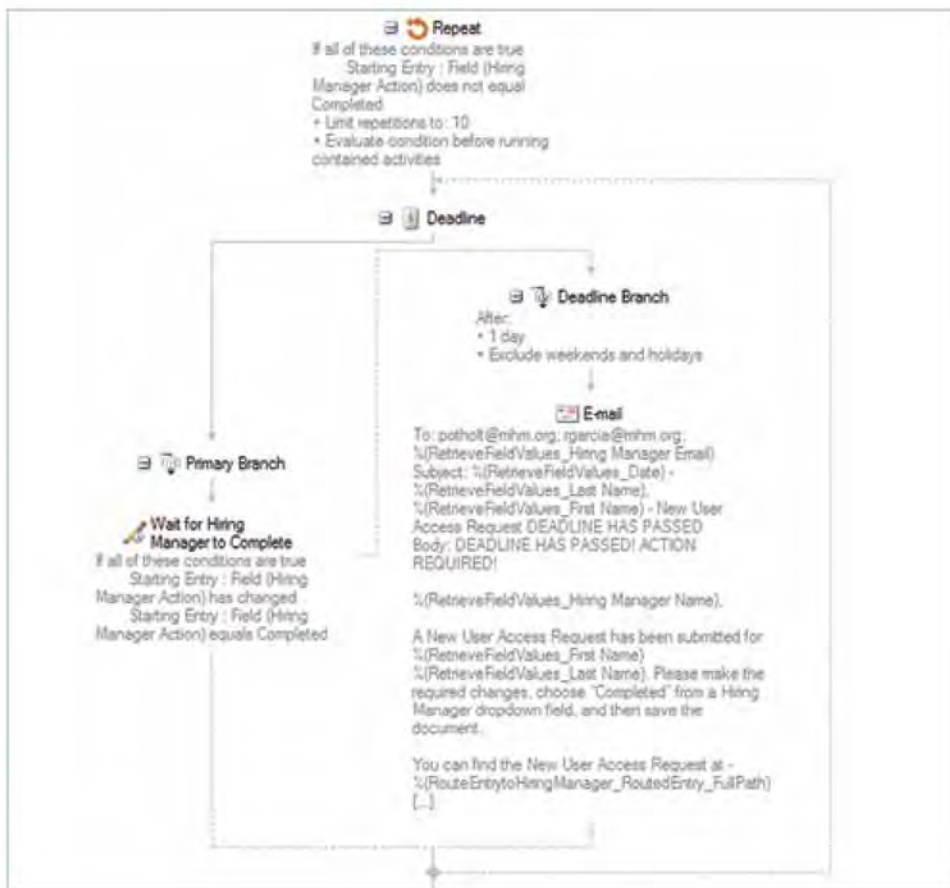
NextGen Server

Health Informatics Action

## What's Going on Behind the Scenes

This whole process is powered by Laserfiche Workflow. The workflow routes the entries, generates the email notifications and keeps everyone in the loop by updating the value of the Workflow Status field with each user's action.

Here, for example, is how the one-day deadline for the hiring manager's action was configured:



Here is the configuration of the starting rules:



The screenshot shows a configuration window for a rule. At the top, there is a dropdown menu labeled 'Event Type:' with 'Entry Created' selected. Below this, a text label reads 'If all of these conditions are true'. A list of three conditions follows, each preceded by a number and a green play button icon:

- 1 User does not equal WF
- 2 Entry : Type equals Document
- 3 Entry : Path equals \HR\Workflows

At the bottom of the list, there are two buttons: 'Add condition' and 'Add group'.

## Benefits of Laserfiche

Streamlining the new user onboarding process with Laserfiche Workflow has resulted in the following benefits for Methodist Healthcare Ministries:

- New users are now onboarded in as little as 30 minutes (a process that used to take days). Email notifications make sure that all parties involved perform their required task in a timely matter.
- New employees can start working right away, as they have access to all of the technology they need on the first day.
- The IT department has the correct requirements from the hiring manager before onboarding a new user, eliminating a lot of time-consuming, back-and-forth communication.
- If the organization's business requirements change, the workflow can be tweaked in a matter of minutes.







# TRAVEL REQUEST APPROVAL

Many employees travel as part of their job. Depending on the organization's size, travel requests may be processed frequently and involve multiple people across the organization. These forms often require detailed information and supporting documents. Laserfiche makes it easy to include information for both requesters and HR employees. Because travel requests are often time sensitive, it is important that they are processed quickly and correctly.

Here are two different ways that organizations have automated the travel request process with Laserfiche.

City of Palm Beach Gardens, FL\_\_\_\_\_84

Kentucky Sanitation District #1\_\_\_\_\_92



## TRAVEL REQUEST APPROVAL

# City of Palm Beach Gardens, FL

**INDUSTRY:**

State and Local Government

**NUMBER OF EMPLOYEES:**

100-500

**HEADQUARTERS:**

Palm Beach Gardens, FL

*Laserfiche Solution Contributed By: David Crump, Senior Software Systems Specialist, City of Palm Beach Gardens, FL*

Every time one of the 600 city employees travels on business, a travel authorization form must be submitted to the Finance department for approval. Once that employee has returned, a travel expense report must also be filled out and approved. In addition, either of these documents could contain a check request for reimbursement.

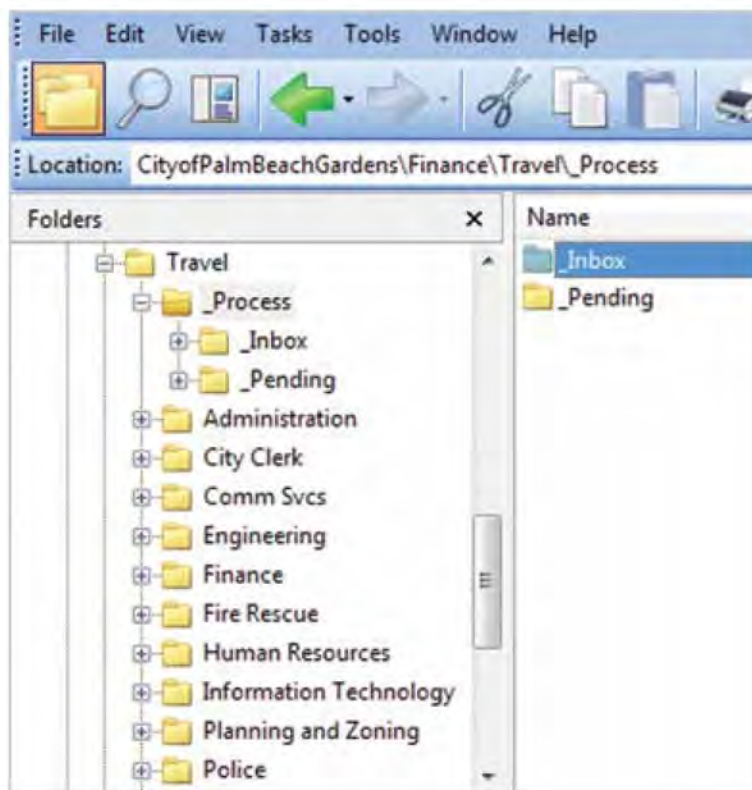
This travel authorization and expense reimbursement processes used to be manual and paper-heavy. Here is how Laserfiche allowed the city to streamline the document lifecycle and improve communication between various departments.



## Capture

The forms involved in the travel processes are available on the city of Palm Beach Gardens' intranet page for employees to download and print. The employee fills out the form with the help of his supervisor and provides supplemental information, such as airline confirmation, hotel registration and check request documents to go along with the reimbursement request.

The forms and all supplemental documents are scanned onto a network drive with one of the many multi-function printers distributed throughout the city. Laserfiche Import Agent monitors the network shared folder for any new documents and automatically imports them into the Travel\_Process\Inbox folder in Laserfiche.



One set of workflows processes both the travel authorization and travel expense reimbursement documents.

## Approval by the Travel Coordinator

Laserfiche Workflow monitors the travel inbox folder for incoming travel request documents. When it finds a new document, Laserfiche Workflow sends an email to the travel coordinator letting her know that a new travel document has been submitted for review.

The travel coordinator reviews the document. If there is a check request included as part of the document, she moves it to the front of that document. She also applies and populates the “Finance – Travel” template.

Template: \_Finance - Travel

(WF Travel) Document Type - Travel (required)

Expense

Name - Employee (Required) (required)

Department

Comm Svcs

Date of Departure (Required) (required)

05/19/2013

(WF Travel) Check Request Present? (required)

No

(WF Travel) Approval 1 - Travel Coordinator

Approved

(WF Travel) Approval 1 Comments

Check request for reimbursement is on 5/8/13 travel expense

(WF Travel) Finance Administrator Approval

Approved

(WF Travel) Finance Administrator Comments

Workflow History

- 5/31/2013 [Approved]

- 5/31/2013 [Approved]

Add/Remove Fields...

Workflow Approval 1 Comments

[Approved] Check request for reimbursement is on 5/8/13 travel expense



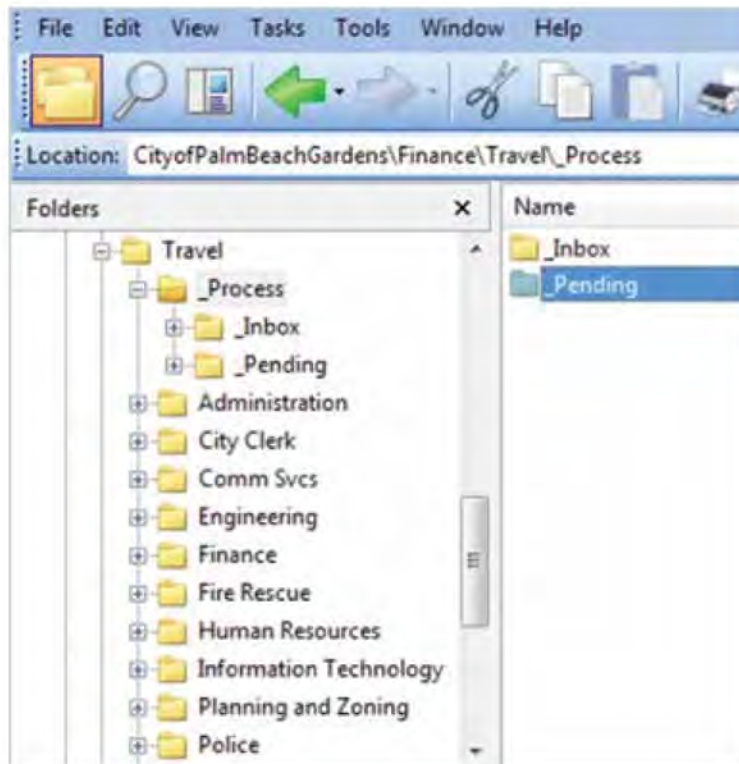
When the travel coordinator is finished with her review, she changes the Travel Coordinator Approval status to either Approved or Disapproved. This action invokes a second workflow.

The next stage in the process is approval by the finance coordinator. Both the travel coordinator and finance coordinator must approve all travel documents.

## Approval by the Finance Coordinator

If the travel coordinator approves the travel documentation, Laserfiche Workflow:

- Routes the documents to the Pending folder.



- Sends an email to the finance coordinator notifying him of a new travel authorization or expense report for review.
- Checks to see if the travel document contains a last minute check request (the value of the Check Request Fields is set to ASAP). If there is one, accounts payable is alerted via email of a last minute check to be cut.

- Renames the travel document to the accounts payable naming standard and appends "Pending Finance Administrator Approval" to the end of the name.
- Notifies the finance administrator of a new request or authorization for review.

Once the finance administrator reviews the travel request, he changes the value of the Finance Administrator Approval Status field to either "Approved" or "Disapproved" and inserts comments into the template. The finance administrator's action launches the third workflow.

If the travel coordinator approves the document but the finance coordinator does not, the document is then sent back to the travel coordinator with comments for a second review.

## Final Travel Document Processing

Before checking if the travel request was approved or disapproved, Laserfiche Workflow checks to see if the travel coordinator and finance administrator left any comments. If comments are found, they are copied and inserted into a Workflow Approval 1 Comments field. Since security settings prevent users in other departments from viewing any of the fields that have to do with the travel coordinator or finance administrator's approval actions, the Workflow Approval 1 Comments field provides a way for requesters to see why their request was approved or disapproved.



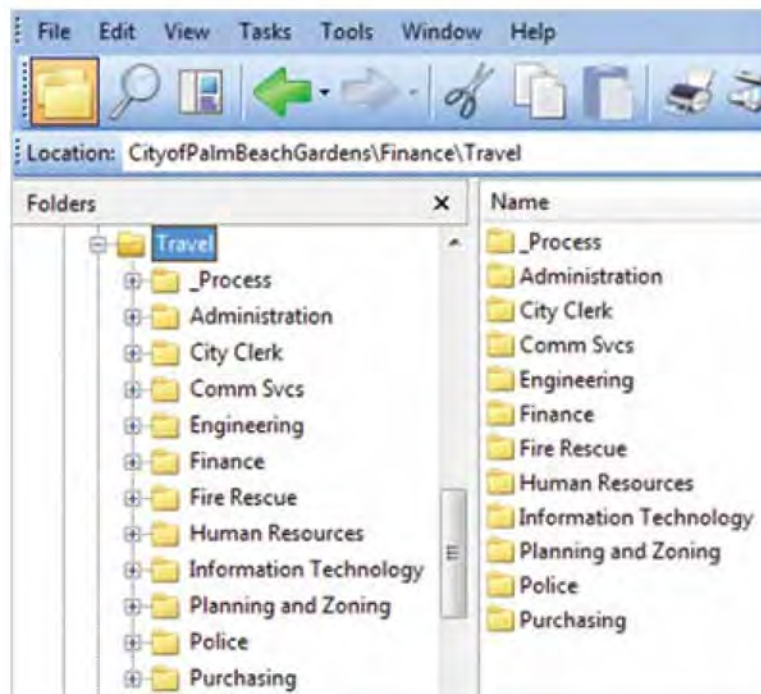
The screenshot shows a 'Metadata' window with tabs for 'Fields', 'Tags', 'Links', 'Versions', and 'Signatures'. The 'Fields' tab is active. It displays a 'Template' dropdown menu with 'No template assigned' selected. Below this is an 'Add/Remove Fields...' button. Underneath, there is a section titled 'Workflow Approval 1 Comments' which contains a text field with the following text: '[Approved] Check request for reimbursement is on 5/8/13 travel expense'.

Next, Laserfiche Workflow checks to see if the finance administrator approved or disapproved the travel request. If the request has been disapproved:

- The document is renamed and sent back to the Inbox folder.
- If there was an ASAP check request attached to the authorization form, the accounts payable department is emailed that the check request was not approved.
- The Travel Coordinator Approval field is reset and the Workflow Prior Denial field is added and populated.

If the request has been approved by the finance administrator, Laserfiche Workflow:

- Renames the document based on the Travel Department's file naming standards and moves it to the Travel folder of the department that initiated the request.

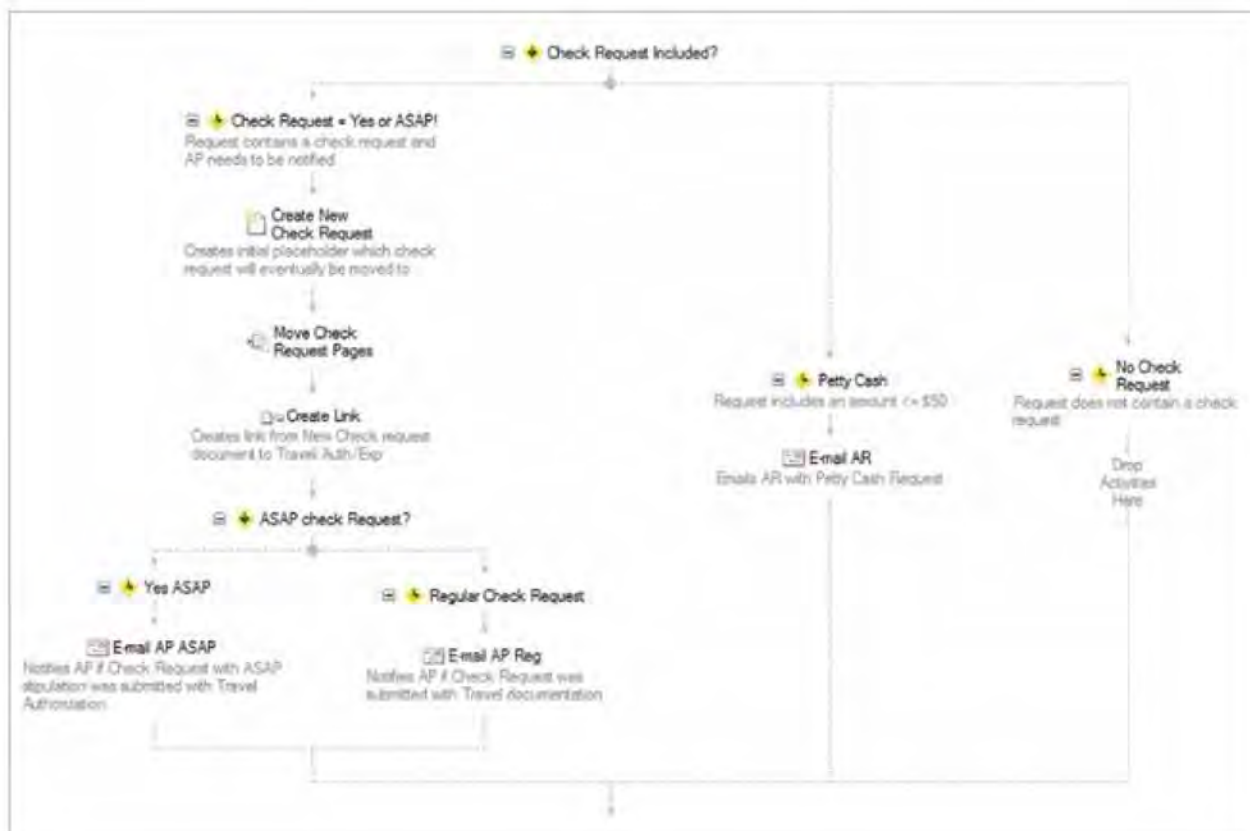




If the travel document contains a check request, Laserfiche Workflow:

- Checks if there is a check request included with the authorization form by looking at the template field. If that is the case, Laserfiche Workflow creates a new placeholder document inside the Accounts Payable\Process\Inbox folder, where the check request will be moved.
- Moves the check request page from the current document to the newly created placeholder document.
- Creates a link between the check request and travel documents.
- Emails the accounts payable department that the travel request has been approved. The AP coordinator will then apply the "Finance – Check Request" template which invokes a separate set of check request approval workflows.
- If the check request is for petty cash, Laserfiche Workflow emails the accounts receivable department.
- Emails the travel coordinator that the travel document has been approved.

Here is the part of the workflow that deals with check requests:



## Benefits of Laserfiche

Implementing Laserfiche at the city of Palm Beach Gardens has resulted in the following benefits:

- Only one copy of documents is now stored in Laserfiche, making them easily accessible by multiple people at the same time.
- Robust security settings allow only authorized personnel to perform certain actions on documents, such as update or enter new metadata.
- The travel expense authorization workflows can easily be used as models for automating various other processes throughout the city.



TRAVEL REQUEST APPROVAL

# Kentucky Sanitation District #1

**INDUSTRY:**

State and Local Government

**NUMBER OF EMPLOYEES:**

100-500

**HEADQUARTERS:**

Fort Wright, KY



*Laserfiche Solution Contributed By: Kathy Jenisch, Records Manager, Sanitation District #1*

The travel request process at Sanitation District #1 (SD1), the second largest public sewer utility in Kentucky, used to be paper-heavy and cumbersome. SD1 automated this process with Laserfiche Forms and Laserfiche Workflow, making it completely paperless from start to finish.



## Travel Request

To request approval for business travel, an SD1 employee submits a travel request in Laserfiche Forms.

Travel Request Form	
<b>Travel Information</b>	
Employee Last Name *	<input type="text" value="Smith"/>
Employee First Name *	<input type="text" value="Sarah"/>
E-mail Address of Traveler *	<input type="text" value="sarah.smith@gmail.com"/>
Departure Date *	<input type="text" value="10/1/2013"/> 
Return Date *	<input type="text" value="10/4/2013"/> 
Employee ID Number *	<input type="text" value="12345"/>
Purpose of Travel *	<input type="text" value="Conference"/>
Any comments or notes regarding travel you would like to provide	<input type="text" value="I attend this conference annually."/>
Will you require assistance in making travel arrangements?	<input checked="" type="radio"/> Yes <input type="radio"/> No <small>(If yes is selected, your dept. admin. will follow up with an information form.)</small>
Are you traveling with a group of SD1 employees?	<input type="radio"/> Yes <input checked="" type="radio"/> No <small>(If yes, please coordinate with all travelers with dept. admin.)</small>
Is this travel anticipated in Travel Budget?	<input checked="" type="radio"/> Yes <input type="radio"/> No

Once the form is submitted, it is saved in the Laserfiche repository. Laserfiche Workflow monitors the folder and sends an email to the employee's immediate supervisor that there is a new travel request for approval. The supervisor can either approve or decline the request by updating the value of the "Immediate Supervisor" field accordingly.

Template: 

Travel Request

Last Name

>

First Name

>

Employee ID

>

Travel Doc Type

Immediate Supervisor

Budget Center Head

Fiscal Year

Cash Advance

Reimbursement

Request Complete

Check Number

>

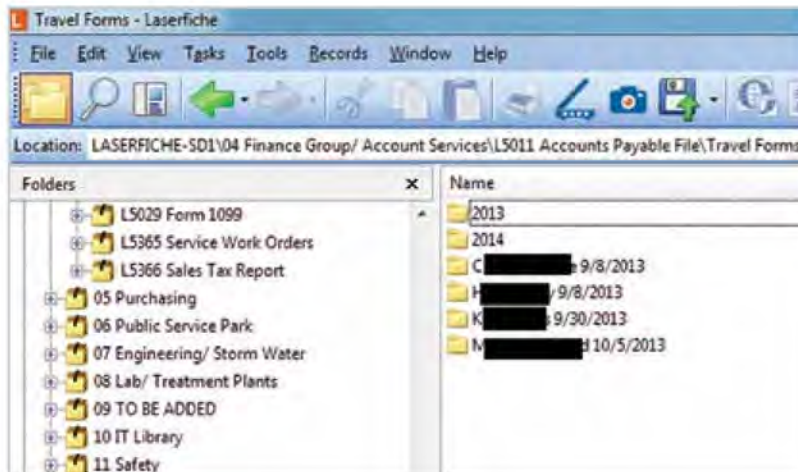
Cash Advance Ready

Reimbursement Ready

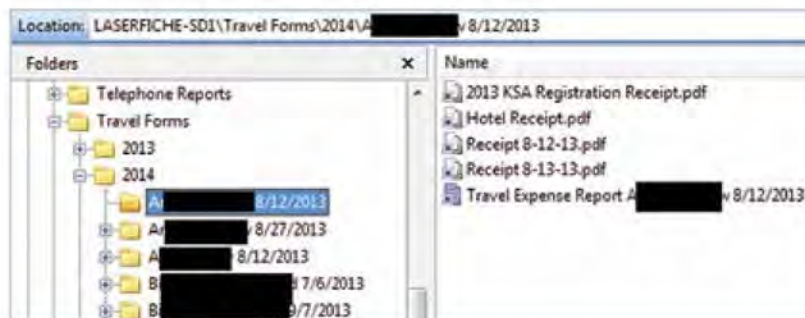
Travel Information

Request for Payment

If the request is declined, the submitter is notified by email and the workflow ends. If the request is approved, an email is sent to the budget center head notifying him/her of a new travel request for approval. The budget center head can either approve or decline the travel request. If the request is declined, an email notification is sent to the submitter and the workflow ends. If the budget center head approves the request, an email notification is sent to the administrative assistant identified on the form for review. The administrative assistant attaches proper documentation, such as conference, meeting or hotel information, and enters the correct fiscal year into the template. Once the travel request is complete, an email is sent to the submitter advising that travel arrangements can be made. The travel request form and associated documentation is moved to the records folder, where retention is automatically applied.



Shortcuts to the form and documents are created in the Travel Forms folder and the folder is named with the traveler's name and date of travel so there is a separate trip folder for each travel instance.





## Cash Advance

If an employee needs a cash advance for travel purposes, the Travel Advance Request form must be submitted after the travel request has been approved.

Travel Advance Request

(To request a cash advance for approved local or non-local business travel)

Employee Last Name \*

Smith

Employee First Name \*

Sarah

Employee ID Number \*

12345

E-mail Address of Traveler \*

sarah.smith@gmail.com

Reason for Travel \*

Conference

Destination

Miami, FL

Departure Date \*

10/1/2013

Return Date

10/4/2013

Advance Amount Requested \*

☒ \$25 or more

☐ Less than \$25

(Select One)

Total Advance Requested

100

Laserfiche Workflow picks up the form and routes it through the various parties for approval, similar to the travel request process outlined above. If the cash advance is for \$25 or more, the accounts payable department is notified to cut a check. If the cash advance is less than \$25, the accounts receivable department distributes the cash. The form and its attachments are then routed to the same records series as the travel request form with retention automatically applied. A shortcut is also placed in the Travel Forms folder in the same trip folder with the travel request.

## Travel Expense Report

When the employee returns from the business trip, a travel expense form must be submitted through Laserfiche Forms. The form is set up in such a way that, when the employee enters daily expenses, subtotals and totals are automatically calculated.

<u>General Expenses</u>								
	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Total
Dates of Travel	10/1/2013	10/2/2013	10/3/2013	10/4/2013				
Airfare	500	0	0	0				500.00
Baggage Fees	30	0	0	0				30.00
Business Meal	0	50	65	0				115.00
Registration Fees	455	0	0	0				455.00
Rental Car	0	0	0	0				
Gas for Rental Car	0	0	0	0				
Ground Transportation	30	0	0	30				60.00
Lodging/Hotel	395	0	0	0				395.00
Parking Fees/Tolls	0	0	0	0				
Mileage (Personal Vehicle)	25	0	0	25				28.25
Phone,Fax,Internet,Postage	0	0	0	0				
Other:								
Other:								
Other:								
(Less personal expenses)								
Total General Expenses								1593.25

Pre-paid expenses are also automatically subtracted to calculate the actual reimbursement due to the employee.

<u>Pre-Paid Expenses</u>				
	Date	Vendor	Check #/Auth Code	Amount
Airfare	9/12/2013	Expedia	1050	500
Registration Fees	9/11/2013	Conference	1040	455
Lodging	9/12/2013	Marriott	1051	395
Ground Transportation				
Total Pre-Paid Expenses				1350.00

<u>Expense Summary</u>	
	Amount
Total travel expenses	1738.25
Less pre-paid items	1350.00
Less other expenses charged to SD1 credit card (total amount)	
Less cash advance received	
Reimbursement due to/from employee	388.25

Note: A negative number indicates the amount due from employee. The employee must return to SD1 any amount in excess of the substantiated expenses within 10 business days of return.

This is done using JavaScript in the Script section of the Laserfiche Forms Designer. Once the employee submits the form, Laserfiche Workflow routes it to the appropriate individuals to review, just like the travel request and travel advance request processes outlined above. After the report is approved by the budget center head, it is sent to either the accounts payable department (if the reimbursement is \$25 or more) or the accounts receivable department (if the reimbursement is less than \$25 or if the employee owes SD1 money).

After the respective department processes the payments, the submitter is notified (via email) to pick up the check or cash or to submit a payment for the outstanding amount. The travel expense report and its attachments are then routed to the same records series as the travel request form and travel cash advance request form with retention automatically applied. A shortcut is also placed in the same trip folder inside the Travel Forms folder.



## Advantages of Laserfiche

Implementing the new automated travel request and expense reimbursement process with Laserfiche has resulted in the following benefits for SD1:

- Documents are never lost or misfiled and requests are approved in a timely manner.
- The records manager is confident that all documents have the correct retention applied while employees can still view their requests in a folder structure that is familiar to them.
- No paper is printed or filed.
- The new process is faster and more efficient than the legacy, paper one. Employees get reimbursed much quicker than before.







# QUICKER BETTER SAFER

## HUMAN RESOURCES

No matter what the industry, organizations of all sizes must manage employee records and onboard new employees. The hiring process alone creates a difficult-to-control flow of resumes, cover letters, job applications, writing samples and other content that crosses multiple departments and business processes.

Learn how organizations across industries have used ECM software to make dramatic changes to their HR function—all while cutting costs, reducing manual labor and complying with state and local regulations.

This book contains a collection of customer solutions (including step-by-step instructions and screenshots) for streamlining and automating business processes such as employee onboarding, travel request processing and employee records management.

“ The impact of Laserfiche on our HR department has been monumental. All personnel files are immediately available, and they're automatically compiled and maintained with Laserfiche Workflow, saving us time and effort. ”

**Lynda Malmberg**, HR and Accounting Manager, Steinhafels Inc.

**Laserfiche**<sup>®</sup>  
**Run Smarter**<sup>®</sup>

[laserfiche.com](http://laserfiche.com)