



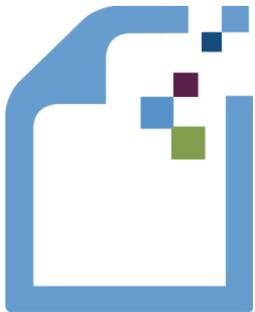
**Laserfiche**<sup>®</sup>  
*Enterprise Document Management*

# Texas A&M Laserfiche Shared Service Common Folder Structure & Records Management

Hosted by  
Texas A&M Information Technology, Office of General Counsel  
and Laserfiche

Presented by Judith H. Lewis, PhD, MS, PMP  
Sr. IT Manager, Computing & Information Services  
Program Manager, Texas A&M IT Laserfiche Shared Service

December 3, 2015



# Presentation Agenda

*Judith Lewis*

- **9:00 a.m.** Introduction (Judith Lewis, Texas A&M Laserfiche Shared Service)
- **9:05 a.m.** Litigation Holds and Electronic Data (Barbara Winckler, Office of General Counsel)
- **9:55 a.m.** Common Folder Structure (Judith Lewis, Texas A&M Laserfiche Shared Service)
- **10:00 a.m.** Break
- **10:10 a.m.** Laserfiche training (Laserfiche)
- **11:00 a.m.** Practical Management from a Compliance View (including Audit Trail)
- **11:30 a.m.** Question & Answer period
- **11:55 a.m.** Closing

# Shared Service Common Folder Structure (Based on System Records Retention Schedule)

Judith Lewis

Name	Pages	Indexed	Creation Date
1.0 Administration Records		No	11/27/2011 10:03:47 PM
3.0 Human Resources/Employe...		No	11/27/2011 10:47:10 PM
9.0 Work In Progress		No	11/28/2011 5:32:37 AM

- Retention schedule undergoing change and approval this year
- Shared service can lead integration of changes into the common folder structure
- Shared service participants benefit from the shared service work

# Texas A&M University System Records Retention Schedule

Recertified: 12/15/11  
Last Amended: 10/11/12



## THE TEXAS A&M UNIVERSITY SYSTEM RECORDS RETENTION SCHEDULE

Records Series Item No.	Agency Item No.	Record Series Title	Retention Period	Archival	Remarks
<b>ADMINISTRATION RECORDS</b>					
<b>Section 1.1 - General</b>					
I.1.002	01.100.10	Audits – Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency audits	AC+7		AC=Publication or release of final audit findings. The State Auditor’s Office retains any copies of its audits performed on Texas state agencies.
I.1.004	01.101.10	Legislative Appropriations Requests – Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC+6	I	AC = September 1 of odd-numbered calendar years. Records with archival value will be retained in the agency archives.
I.1.006	01.102.10	Complaint File – Complaints received by an agency from the public concerning the agency and records pertaining to the resolution of the complaint.	AC+2		AC=Final disposition of the complaint  CAUTION: if a complaint becomes the subject of litigation, it must be included in and is subject to the minimum retention period of item number I.1.048.

<http://assets.system.tamus.edu/files/legal/pdf/System-Records-Retention-Schedule-Dec2012.pdf>

## Best Practices:

- Determine the approval process for destruction in department
- Document departmental procedures for destruction process
- Coordinate with Records Management office for documents of record destruction
- Determine who in the department can delete from Laserfiche
- Exercise process on a regular interval

# Records Management Resources

*Judith Lewis*

## Texas A&M System Office:

R. Brooks Moore  
Managing Counsel, Governance  
A&M System Office of General Counsel  
(979) 458-6144 (direct)  
[rbm@tamus.edu](mailto:rbm@tamus.edu)

## Texas A&M University Records Management:

Eric Gater  
Records Management  
330 Agronomy Rd., Ste. 160  
(979) 458-1470  
[RMDesk@library.tamu.edu](mailto:RMDesk@library.tamu.edu)  
<http://library.tamu.edu/records>

# Records Officers for The University System

Judith Lewis

The screenshot shows a web browser window displaying the Texas A&M University System website. The page title is "Records Officers for The Texas A&M University System". Below the title, there is a navigation menu with links for SYSTEM HOME, ABOUT, BOARD OF REGENTS, CHANCELLOR, OFFICES, RESEARCH, JOBS, and CONTACT. A search bar is also present. The main content area features a table of records officers and a sidebar menu.

Home » Records Management » Records Officers for The Texas A&M University System

**Records Officers for The Texas A&M University System**

Please direct all records retention questions or comments to the following administrators:

Institution/Agency	Records Officer/Email Address	Phone Number
System Offices	Mr. Brooks Moore	979-458-6144
Prairie View A&M University	Ms. Paula Sandles	936-261-2150
Tarleton State University	Ms. Susan Barkley	254-968-9658
Texas A&M International University	Mr. Steve Harmon	956-326-2180
Texas A&M University	Mr. Eric Gater	979-458-1470

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<http://www.tamus.edu/legal/records-management/records-officers-for-the-texas-am-university-system/>

The screenshot shows a web browser window with the URL <http://laserfiche.tamu.edu/>. The page header includes the Texas A&M Information Technology logo and the text "Laserfiche® Users" with a "GET PRICING" button. The main content area features a large blue banner with the text "Get Started with Laserfiche" and "Enterprise Content Management for The Texas A&M University System". Below the banner are three white boxes with icons and text: "Workshops" (Deepen your Laserfiche expertise and network with colleagues), "Training" (Learn how to use Laserfiche more effectively), and "Publications" (View Laserfiche knowledge resources). Each box has a "Read More" link. Below this is a "Latest on Laserfiche" section with two items: "Laserfiche Training Workshop" (dated 12-03-2015) and "Discovery Session" (Join us for a Discover Session at no charge to learn how Laserfiche can improve your department's information and documents).

# Laserfiche Shared Service Community of Practice and Listserv

Judith Lewis

\*The name of the list: TAMU-LASERFICHE

## Shared Service Customers

The Texas A&M University System Offices  
Texas A&M University Office of the President  
Prairie View A&M University

Texas A&M University - Kingsville  
Texas A&M AgriLife

[MORE ABOUT OUR CUSTOMERS](#)

### Customer Support

979.847.4877  
laserfiche@tam.u.edu  
Help Desk Central  
IT.tamu.edu

### Community

Steering Committee  
Shared Service Customers  
CIO.tamu.edu

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Texas A&M Information Technology

Q & A:

*Judith Lewis*

Thank you for your interest in Laserfiche.

Contact Information:

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Program Manager  
[laserfiche@tamu.edu](mailto:laserfiche@tamu.edu)