



Laserfiche Implementation at Texas A&M AgriLife



Texas A&M AgriLife (AgriLife) encompasses five members of The Texas A&M University System, employs roughly 6,000 individuals and operates 80 different major units statewide. In addition, the Texas AgriLife Extension Service, a component of Texas A&M AgriLife, has a presence in 250 of the 254 counties in Texas.

THE CHALLENGE

Before implementing Laserfiche, Texas A&M AgriLife had no system for managing documents and information.

“Moving documents from units scattered throughout the state was costly and cumbersome, especially when it came to disbursements (accounts payable), which required documents to be sent by overnight mail,” says Program Manager Robert Hensz. “In addition, we were creating multiple copies of the same documents to send to all the units, which made records management extremely difficult.”

Hensz also points out that staff spent a “massive” amount of time manually filing documents that were generated each day. “These documents were created via a mainframe system and printed locally to various offices,” he says. “And they were, in many cases, matched to an existing group of documents prior to being filed—which required additional personnel and time.”

THE SEARCH FOR A BETTER SOLUTION

In 1998, staff began to consider the benefits of document management, but because of more pressing issues, the search quickly stalled. In 2005, however, the search for a document management system restarted. The program’s storage facilities had reached maximum capacity, and the only physical storage solution was to use rotary file cabinets. However, purchasing this type of cabinet was prohibitively expensive, and the floor in a proposed

storage room would not support the weight. In addition, the geographic distribution of units within AgriLife made sending paper documents back and forth an expensive proposition—as well as a time-consuming one.

Years before choosing Laserfiche, a design team comprised of internal employees created a list of system requirements for their document management solution. These included:

- *A secure solution that would adhere to state record keeping requirements.*
- *The ability to produce and share unalterable records.*
- *User access rights.*
- *Tape backup capability.*

AgriLife originally heard about Laserfiche from the Department of Entomology, who was using it within its administrative office. But through the RFP process, Laserfiche was chosen, according to Hensz, because of its cost and ability to connect decentralized scanning from individual workstations to a central repository, something that most competitors were unable to do or that would be cost prohibitive.

THE IMPLEMENTATION

AgriLife’s Laserfiche implementation took place in stages. The first stage involved creating the repository, filing structure and user accounts. The 300-plus units throughout the state share a central repository, which enables different divisions to easily share documents. Security is controlled by access rights, which are assigned by groups, such as bookkeepers or business personnel. Each unit also has a similar assigned group. Individuals are granted access through assignment to a series of groups, so when a staff member moves to another unit, removing them from their old group eliminates all their access rights.

Laserfiche Implementation at Texas A&M AgriLife *(continued)*

In the second stage of the implementation, Laserfiche was integrated with two pre-existing systems, the Budget/Payroll/Personnel System (BPP) and the Financial Accounting Management Information System (FAMIS), using FabSoft Reform. FabSoft Reform captures the print stream from any operating system, application or device, including mainframe systems like BPP and FAMIS. FabSoft then automatically enhances it and sends it directly to Laserfiche. With this integration, it is possible to automatically process more than 5,000 personnel files hourly, with fewer than 35 errors—a 0.007 percent error rate.

“This automation has enabled us to rapidly file documents while saving countless man-hours of work,” Hensz says. “For example, in the Disbursements Office, invoices and other related documents are placed in a folder until another form is printed from the mainframe. The mainframe prints the documents to the Reform server, then the text areas are identified by FabSoft and, if necessary, it applies an overlay. The script runs, matching the newly created documents to the existing documents, and then applies the newly printed document as the package’s cover sheet and files the entire thing in Laserfiche.”

Finally, in the third step of the implementation, AgriLife used custom scripts for the Laserfiche Workflow engine to automate previously document-centered work processes. The Implementation Team also developed a series of “Work-in-Progress” folders, which staff use to rapidly exchange paperwork in cases where Workflow is not needed. Documents are scanned or electronically archived and placed in the office’s folder, so staff can then immediately obtain necessary documents and begin processing. For example, disbursements (accounts payable) staff can obtain invoices and other paperwork and being processing them for payment. Using Laserfiche, documents are exchanged electronically, rather than by overnight mail.

Relying on Laserfiche has reduced the payment processing for disbursements from eight days to a single day!

Currently, AgriLife uses Laserfiche to secure and centralize the storage of personnel files, payroll documents, disbursements and contracts and grants. Laserfiche is also used to manage invoices, which helps the program comply with Texas state law requiring agencies to pay invoices within 30 days.

Other types of documents stored include requests, bids, purchase orders, invoices, payables and master agreements. Laserfiche automates the filing of 6,000 vouchers, which previously had to be scanned in from paper copies. The program is also beginning to use Laserfiche to manage correspondence.

THE RESULTS

With over 1,300 users and 13 million pages stored in their Laserfiche system, the program has eliminated redundant paperwork, reduced paper consumption and significantly lowered the amount of money spent on overnight shipping and printing costs. According to Systems Administrator Tim Knezek, AgriLife expects to earn a significant ROI due to reduced paper consumption, better retention schedule adherence and the ability to more quickly respond to records requests.

“Laserfiche has led us to examine our other business processes, so we’ve automated a variety of other reports and documents,” Hensz says. “This has reduced—or in some instances even entirely eliminated—printing of paper reports.”

In the future, AgriLife expects to expand their solution to include additional departments, users and counties. They are also looking to automate more of their document processing to further increase efficiency.