

State of Idaho Laserfiche User Group





Agenda

- Introductions
- User Group Overview
- Contract
- Laserfiche ECM
- User Presentations
- Q&A

INTRODUCTIONS

ITS

Brigette Teets, Application Hosting Lead

Chris Carlisle, Software Licensing Architect

MCCi

Donny Barstow, CEO/President- MCCi & JustFOIA

Alexis Blue, Enterprise Account Executive

Andre Armstead, Account Executive (local government)

Annie Lloyd, Project Coordinator

Users Presenting

Cassie Lint, Idaho Department of Corrections

Craig Slack, Idaho Department of Health and Welfare



MCCI CONTRACT INFO

The State of Idaho (“the State”) seeks to contract with an Enterprise Content Management (“ECM”) provider (also “offeror”) to be the State Standard, capable of serving a variety of public entities with differing functional requirements.

- The solution should be an off-the-shelf, on-premises solution with hybrid cloud capability.
- All new implementations, replacements for legacy and out of support ECM systems, and replacements of systems where cost effective to standardize will utilize the ECM solution awarded as a result of this solicitation.
- The State desires an effective way to purchase licensing and professional services that include migration of data, creation of workflow automation, training, consulting, business analytics, and requirements gathering.

MCCI CONTRACT INFO

MCCi is happy to announce our **State Contract SBPO020231555** for Enterprise Content Management.

Agencies can benefit from volume-based pricing and implementation services as well as access to other automation technologies.

More information about the contract can be found at <https://purchasing.idaho.gov/statewide-category/mcci-llc-sbpo20231555/>.



ABOUT OUR COMPANY

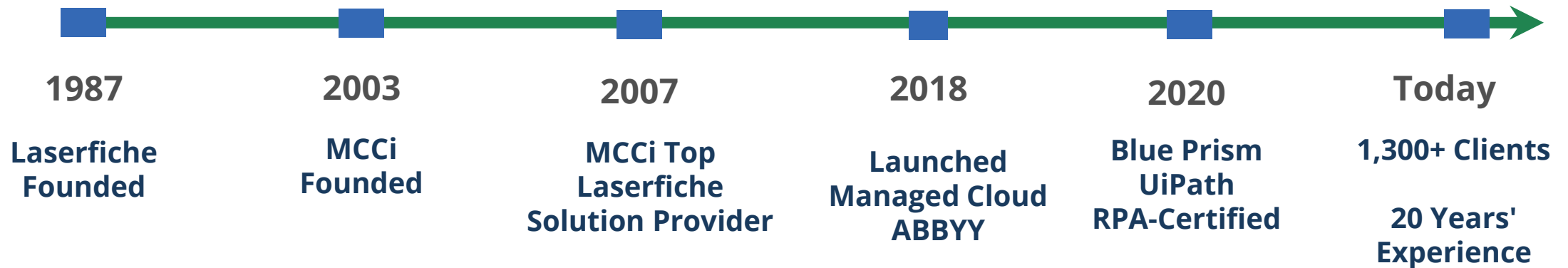
MCCi is a business process automation company that accelerates digital transformation by adding intelligence to your processes. As an IT services company with expertise in delivering end-to-end solutions, we provide our clients some of the leading hyperautomation technologies.



OUR STORY

We've Been Around the Block — Nearly 20 Years

We are a leader in government modernization serving more than 1,300 public sector agencies across the nation.



OUR SOLUTIONS

DIGITAL OPERATIONS TOOLBOX



Content Services



Intelligent Document Processing



FOIA Request Management



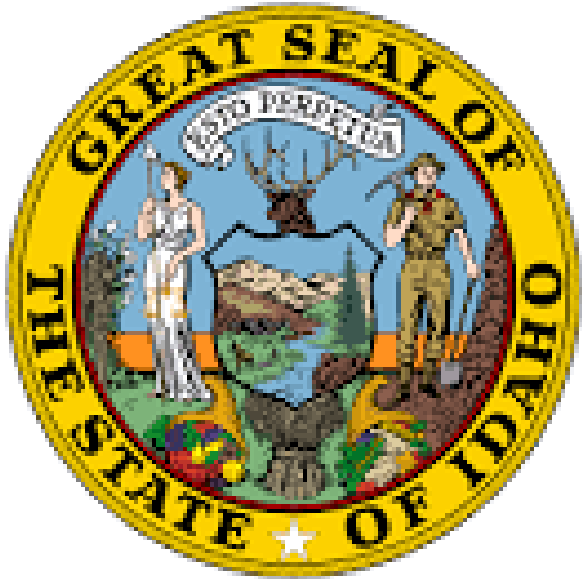
Robotic Process Automation



Process Automation Mining



CURRENT USERS



**OFFICE OF ATTORNEY GENERAL
REAL ESTATE COMMISSION
PUBLIC UTILITIES COMMISSION
DEPARTMENT OF ADMINISTRATION
STATE DIVISION OF PURCHASING**

100+ Local Government/K-12 Agencies



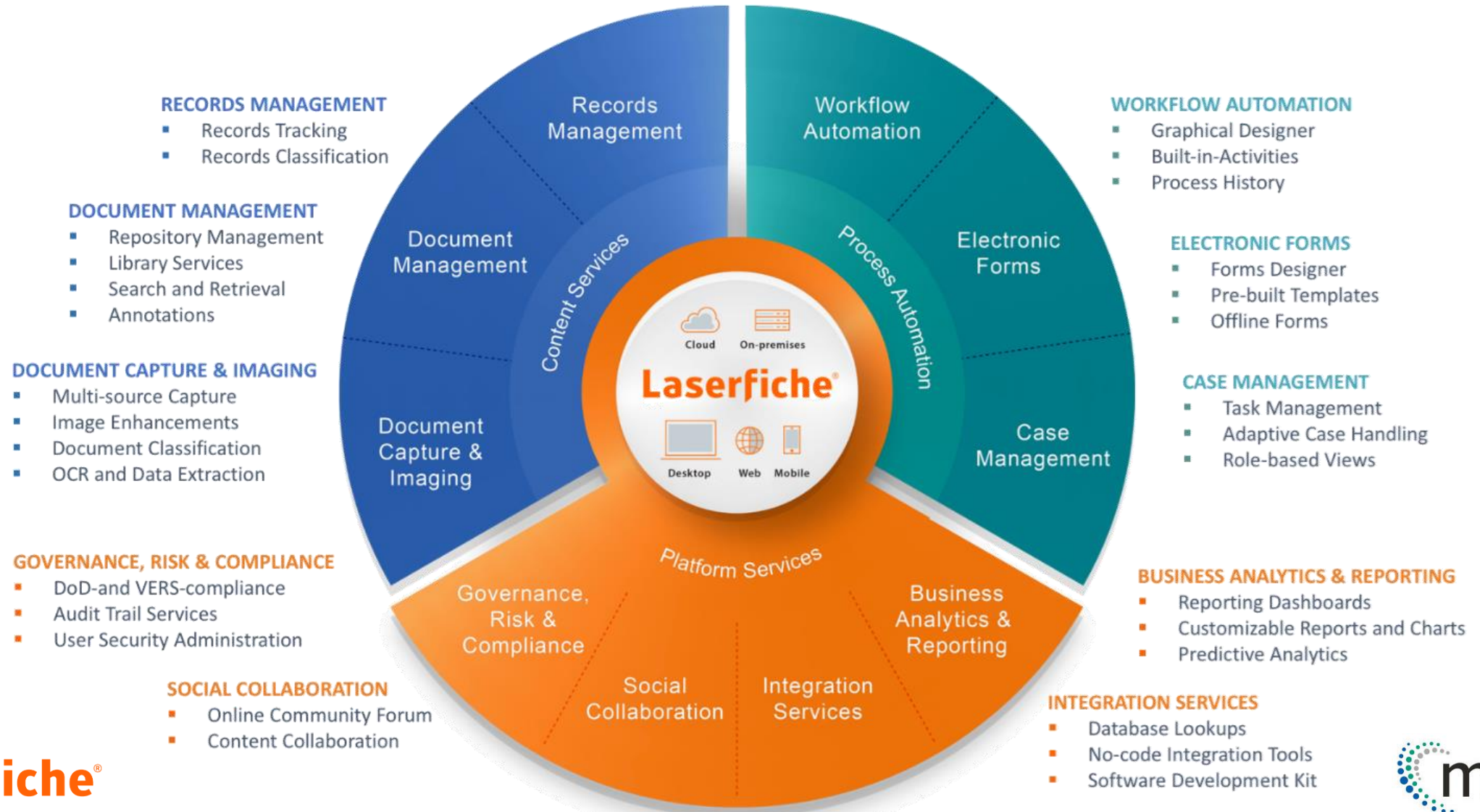
LASERFICHE OVERVIEW

Laserfiche pioneered the paperless office with enterprise content management more than 30 years ago and evolved to be the leading global solution for intelligent content management and business process automation.



- A global community of leaders and evangelists
- 5 Million users & 9,000+ organizations in every industry, including government, education, financial services and manufacturing
- Focused resources for product advancement and market development
- Robust community program for on-going user training and education

CONTENT SERVICES



DEMO

RECORDS MANAGEMENT

- ▼ [Folder Icon] 0H1 Human Resources
 - ▼ [Folder Icon] 0H1E Employee Files
 - ▶ [Folder Icon] 0H1EA Onboarding
 - ▼ [Folder Icon] 0H1EB Tax Documents
 - ▶ [Folder Icon] 2015
 - ▶ [Folder Icon] 2016
 - ▶ [Folder Icon] 2017
 - ▶ [Folder Icon] 2018
 - ▶ [Folder Icon] 2019
 - ▶ [Folder Icon] 2020
 - ▶ [Folder Icon] 0H1EC Benefits Enrollment
 - ▶ [Folder Icon] 0H1ED Performance Reviews

- ▼ [Folder Icon] Human Resources
 - ▶ [Folder Icon] *Resources
 - ▼ [Folder Icon] Employee Files
 - ▶ [Folder Icon] Allen, Abigail
 - ▶ [Folder Icon] Beuder, Holly
 - ▶ [Folder Icon] Hall, Andrew
 - ▶ [Folder Icon] Johnson, Courtney
 - ▶ [Folder Icon] Kelley, Tucker
 - ▶ [Folder Icon] Morgan, Mark
 - ▶ [Folder Icon] Schmitt, David

Black, Michael ☆

Metadata Preview Fields **Records**

Life Cycle [Edit properties](#)

8/13/2010 ○ Filing date

4/3/2012 ○ Employment Ended

8/18/2013 ● **Cutoff**
Eligible for cutoff 4/3/2013

4/3/2023 ○ Eligible for destruction

Details

Location Current file area

Status Cutoff

Path Repository 1\OP4 Human Resources Records\01-01 Employment Applications\Black, Michael

Permanent No

Cutoff Instruction

Name Employee Records

Type Interval-Event

Interval 12 months

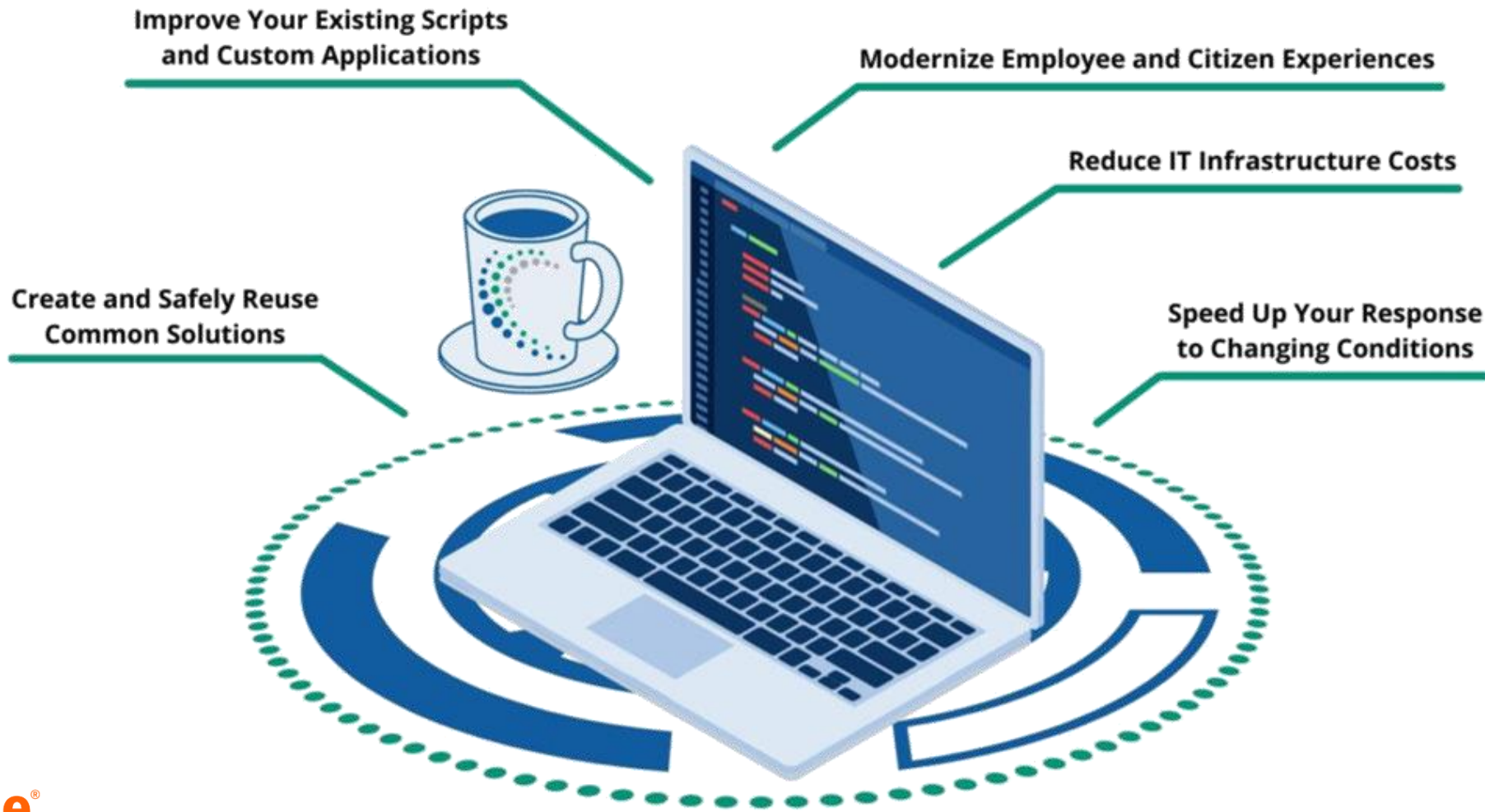
Retention Schedule

Name Employee Records

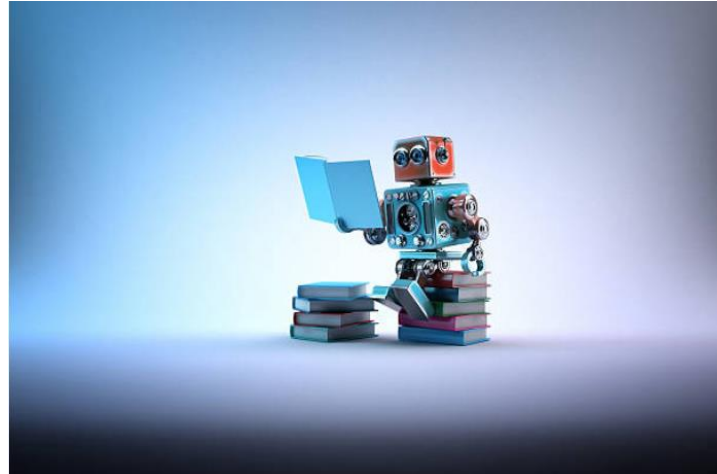
Type Destroy

Retain for 10 year(s), 0 month(s)

NO CODE LOW CODE PLATFORM



POPULAR PROCESS EXAMPLES



AUTOMATE

Contract Management
Accounts Payable
Records Management
Human Resources
Filing Process
System Integrations
Citizen & Customer Forms
Internal Approvals
Applications

LASERFICHE SOLUTION MARKETPLACE

The image displays the Laserfiche Solution Marketplace Designer interface, which allows users to create or select business processes. The interface is divided into several sections:

- Designer - Choose a process or create a new process:** This section includes options for 'Blank Process', 'Form Submission', and 'Form Approval'.
- Business Process Library:** A sidebar on the left lists various categories such as Accounting & Finance, Facilities Management, Human Resources, Information Technology, Legal, Operations, Records Management, and Industry-Specific (Construction, Government, Higher Education, K-12).
- Process Templates:** A central area showing a list of templates like 'Job Application', 'Job Requisition', 'New Hire Onboarding', 'New Hire Preboarding', and 'Offer Letter Generation', each with its category and complexity level.
- Student Accident Report Form Detail View:** A larger window on the right provides a detailed view of a specific process. It includes:
 - Process Flow:** A visual diagram showing the steps: Student Accident Report Form Submitted → Review and Signature → Send to School's Registrar → Send to Principal → Send to District Office.
 - Buttons:** '1. Download Files' and '2. Import Process'.
 - Description:** A text block explaining that a nurse or school official fills out the form after an accident or injury on school grounds, which is then reviewed, signed, and saved to the repository.
 - Participants:** A list of roles and their responsibilities: Nurse/School Official (submits), Principal (reviews and signs), and District Office (receives a PDF copy).
 - Laserfiche Repository:** Information about where the forms are stored.
 - Related Business Processes:** A section at the bottom showing other related forms like 'Student Residency Questionnaire', 'Student History and Information', and 'Student Health Information Form'.



SOLUTION INTEGRATIONS

Database look-up, updates, and validations between your main of line business systems.

TECHNOLOGY OPTIONS

- WORKFLOW
- LASERFICHE CONNECTOR
- ROBOTIC PROCESS AUTOMATION
- THIRD-PARTY CONNECTORS
- PARTNER INTEGRATIONS

COMMON INTEGRATIONS

- ACCELA
- ARCGIS
- BRAZOS E-CITATIONS
- BS&A
- EDEN
- ENERGOV
- ESRI
- GEMS
- GRANICUS
- GREAT PLAINS
- INCODE
- LAWSON
- MUNIS
- NEOGOV
- SHAREPOINT



MIGRATION EXPERIENCE

**We have performed
over 500
migrations....**



Systems we have migrated:

- Accela
- Alchemy
- Application Extender/AppXtender
- CSV
- Documentum
- Docuserv
- Docushare
- Docuware
- EDMS
- Edocs
- Enterprise
- ETFile
- Filenet
- Fortis
- Halfile
- HP Content Manager
- Hummingbird
- IBM AS400
- IBM Jukebox
- ImageNow
- Invize
- M-Files
- NetDMS
- OceDirect
- OnBase
- OpenText
- Optiview
- PaperVision
- PC Docs
- Questys
- Sire
- SoftDocs
- System
- VisiFlow
- Winocular



ACCESS IDAHO INTEGRATION

Instant Redirect Forms: Post Laserfiche Form Data to CCP API for Payment

Company Name: MCCI

First Name: Rose

Last Name: Brewer

Phone: 530-339-2668

Email: rbrewer@mccinnovations.com

Address

Address	Address 2	City	State	Zip
1234 Mountain Way		Mount Shasta	CA	96003

Click here if Billing Address is the same Yes

Billing Address

Address	Address 2	City	State	Zip
1234 Mountain Way		Mount Shasta	CA	96003

Renewal Lines

Sku	Description	UnitPrice	Quantity	
1	wine renewal licens	500.00	1	×
2	beer renewal licens	200.00	1	×

Add

PAY

Figure 1: Laserfiche Forms Example with Services

1 Payment Type 2 Customer Info 3 Payment Info 4 Submit Payment

Payment

Payment Type ✓

Credit Card

Customer Information ✓ Edit

Address: Rose Brewer, 1234 Mountain Way, Mount Shasta, CA 96003

Phone: 530-339-2668

Country: United States

Email Address: rbrewer@mccinnovations.com

Transaction Summary

wine renewal license	\$500.00
beer renewal license	\$200.00
Service Fee	\$22.00
Idaho.gov price	\$722.00

Need Help?
Contact Access Idaho at (208) 332-0102 or toll free at 1-877-443-3468.

All credit card information is handled through NIC Common Checkout Pages, which is a **PCI compliant payment portal.



IDAHO
DEPARTMENT OF
CORRECTION



Cassie Lint, Project Manager



ABOUT IDOC

2015: Laserfiche Empire Established



2018: Laserfiche Run Smarter[®] Award



2019: Upgraded to RIO



Current:
80+ Active Forms
200+ Workflows
6 Repositories

USE CASE – Client Travel Request



Client or PPO
Submission



Authentication/Review



Integration



Documentation

DEMO

IDAHO DEPARTMENT OF CORRECTION

[Client](#) vs [PPO](#)

(208) 658-2000

IMAGE NOT AVAILABLE

IDOC #:

Name:

Address of Record

Travel Information

Permission to travel granted by:

Supervised by:

Destination:

Purpose of trip:

Leave Date:



Travel Method:

Return Date:



Destination Address:

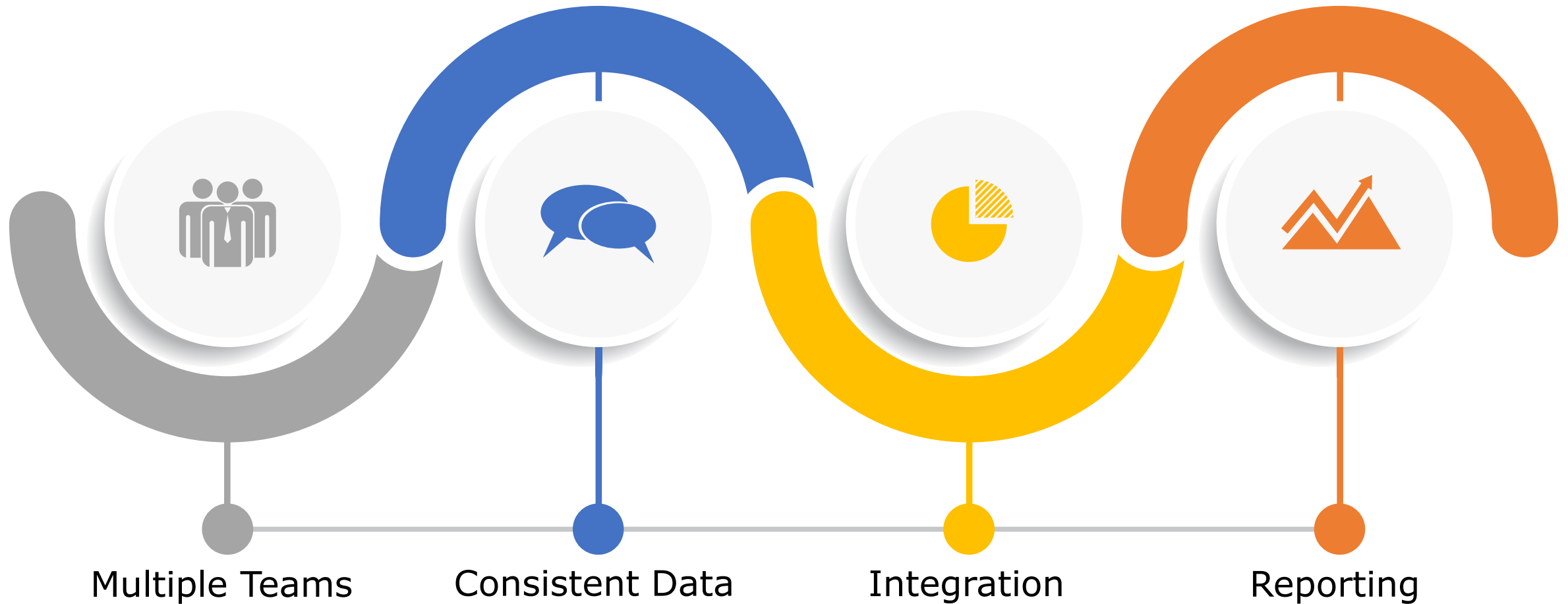
Destination Phone:

Accompanied By:

Name

Relationship

USE CASE – Background Investigation



DEMO

[Request Applicant Submit Back](#)
[Background Questionnaire](#)
[Criminal Records Check Summ](#)
[Change Hiring Decision](#)
[Personnel Action Request](#)

0. BIQ

Layout Field Rules Lookup Rules Error Messages Themes CSS and JavaScript

Fields Variables

Single Line

Multi-line

IDX

Filled by custom url passing variable. Used by lookup to fill other fields.

Manager Username

busEntity	title	payGrade	minRate	securityType	compAnalysis	bgTier
100	Admin Support Manager - Central Office	N	26.18	NONSECURITY	Y	2
100	Admin Support Manager - Institutions	N	26.18	NONSECURITY	Y	2
100	Administrative Assistant 1	H	12.59	NONSECURITY	Y	2
100	Administrative Assistant 2	I	14.70	NONSECURITY	Y	2
100	Appeals/Hearing Technician	J	16.58	NONSECURITY	Y	2
100	Building Facility Foreman, Corr	K	18.57	NONSECURITY	Y	2
100	Building Operations Manager	K	18.57	NONSECURITY	Y	1
100	Business Operations Manager	M	23.70	NONSECURITY	Y	1
100	Buyer, Sr	K	18.57	NONSECURITY	Y	2
100	CI Driver/Installer	NA	NA	NONSECURITY	Y	2
100	CI Job Training Associate	NA	NA	NONSECURITY	Y	2
100	CI Job Training Specialist	NA	NA	NONSECURITY	Y	2
100	CI Job Training Specialist, Sr	NA	NA	NONSECURITY	Y	2
100	CI Production Manager	NA	NA	NONSECURITY	Y	2

</> Custom HTML

Section

Page Break

Collection

Table

Filled by lookup, JS then uses value to fill radio btn field "Does this position..."

Background Tier

Filled by lookup and used for Field Rules to show/hide sections based on background investigation tier.



IDAHO DEPARTMENT OF

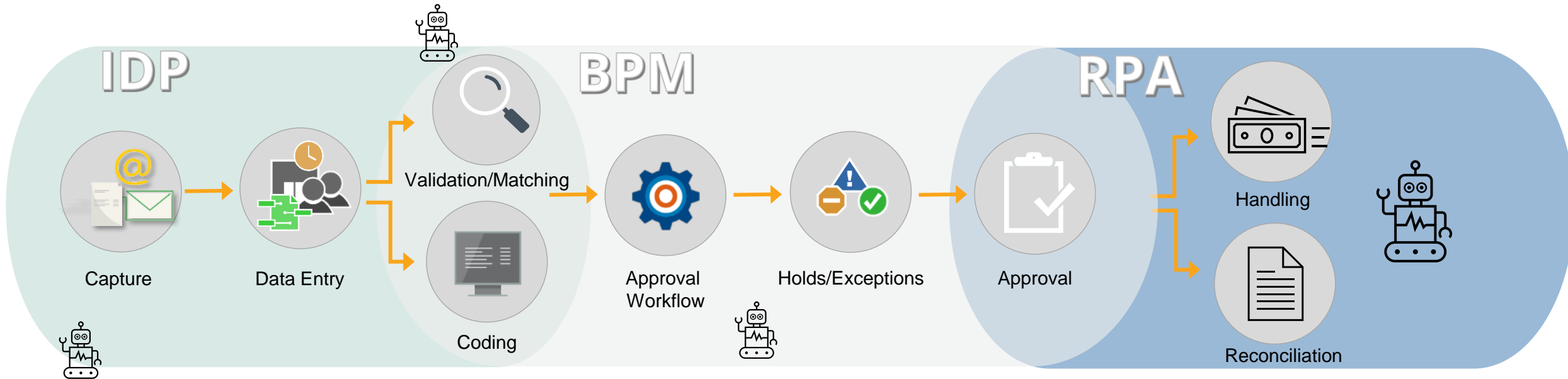
HEALTH & WELFARE

Craig Slack,

INTRO TO INTELLIGENT AUTOMATION

INTELLIGENT AUTOMATION

These can be implemented all together or just certain pieces into your process.



TYPES OF DATA



Structured Data

Often numbers or labels, stored in a structured framework of columns and rows relating to pre-set parameters.

 ID CODES IN DATABASES

 NUMERICAL DATA GOOGLE SHEETS

 STAR RATINGS



Semi-structured Data

Loosely organized into categories using meta tags

 EMAILS BY INBOX, SENT, DRAFT

 TWEETS ORGANIZED BY HASHTAGS

 FOLDERS ORGANIZED BY TOPIC



Unstructured Data

Text-heavy information that's not organized in a clearly defined framework or model.

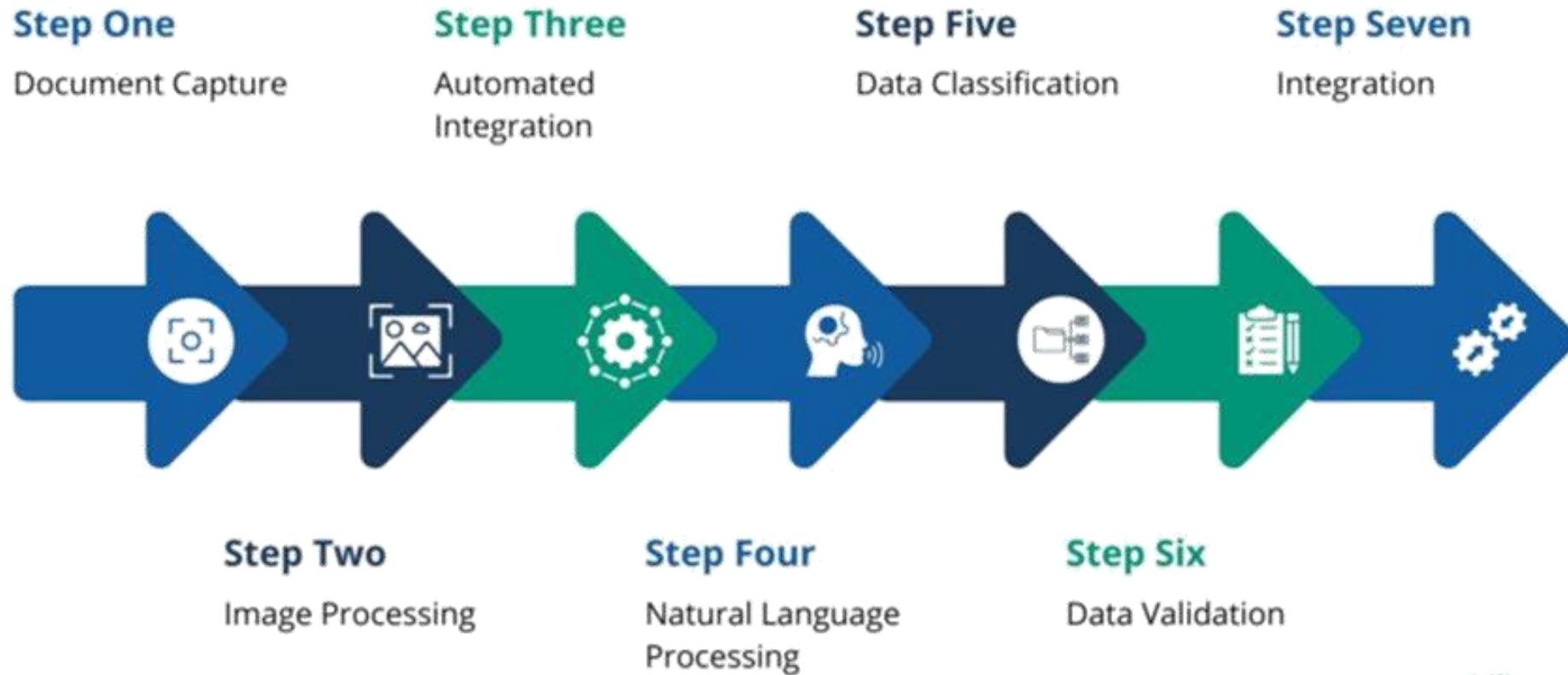
 MEDIA POSTS, EMAILS, ONLINE REVIEWS

 VIDEOS, IMAGES

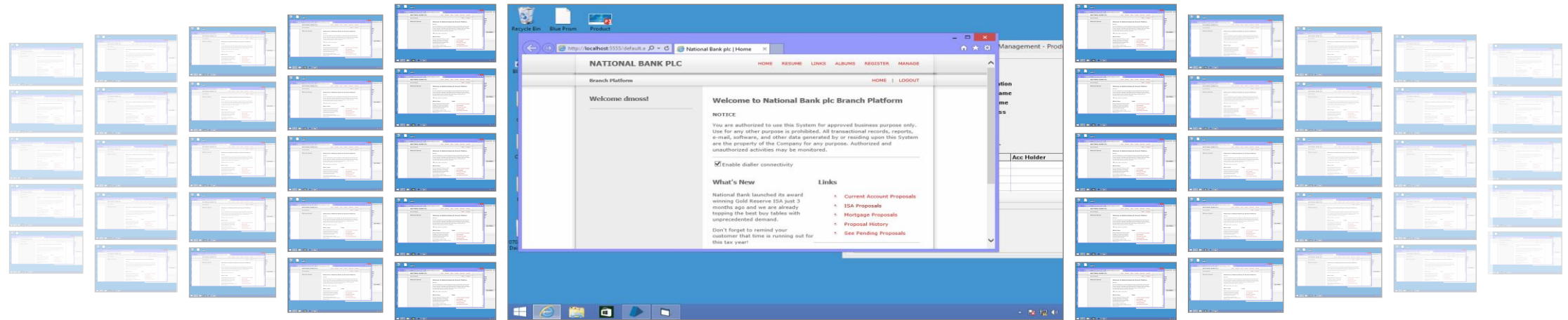
 SPEECH, SOUNDS

WHAT IS INTELLIGENT DOCUMENT CAPTURE

Intelligent Document Processing Steps



DIGITAL WORKERS



Automation for Anything

- Access the front-end UI layer
- Work with virtually any application
- Infinitely scalable / extensible

Automation for anyone

- Visio / Excel-like development
- Intuitive maintenance / improvement
- Flexible management

TYPES OF PROCESSES FOR AUTOMATION

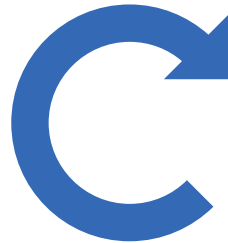
Robotic opportunities are defined with an assessment across existing processes. The criteria for robotics processes:

High Volume



High volume processes
Fluctuation in demand
Fluctuation in backlog

Repetitive



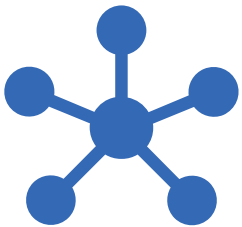
Repetitive processes
Clerical processes
Manual batches

Manually Intensive



Rekeying data
Data entry
Frequent user errors from re-keying

Multiple Legacy Systems



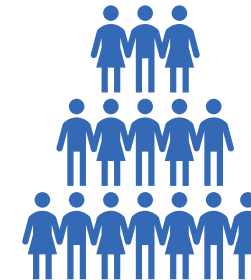
Swivel chair processes
Manual integration
Data capture from multiple sources
Keying data in and out of legacy systems

Logic & Rule Based processes



Low reasoning
Low abstraction
No extra knowledge
No judgement required

High FTE Effort



High FTEs engagement
Data handled by users

TYPES OF TASKS FOR AUTOMATION

- Copy and paste data
- Make calculations
- Follow if/then decisions and rules
- Move files and folders
- Open, digest, and send emails (including attachments)
- Extract data from or modify documents and spreadsheets
- Read and write databases
- Log into and operate web apps
- Connect to web APIs
- Send text messages and IMs



RPA USE CASES



Pandemic Unemployment

Rol: **130k hours saving**

Service: **15 mins to 1½ mins**



Food Stamps

Rol: **1,000 lives everyday**

Service: **35 mins to 5 mins**



Virtual Agent

Rol: **\$5.4M saved**

Service: **4.83M bot only trans.**



OAG Requests

Rol: **1,000's labor hours**

Service: **80% bot handled**

TEXAS ERS

No	Process Name	Description	Frequency	Volume	No of staff supporting the tasks	No of current steps in the process	Applications & Versions
1	Alternative Investments Reconciliation	Four-way reconciliation of quarterly statements from GP to ending NAV, remaining commitments, and transaction details related to funds	Quarterly	~300 quarterly, 20-30 monthly	4	200+ for one fund	Access 2013, 2016 Crystal Reports 2013 BNYM Nexen (ext webapp) Burgiss Private I 5.9.2.1 (ext webapp) Adobe Acrobat Pro 2017 SharePoint 2016 Outlook Excel
2	General Ledger Reconciliation – Appropriations	Reconciliation of various journal vouchers against General Ledger (PSFT Financials).	Daily, weekly, monthly	20-25 daily	5 – daily; 3 weekly	50-100 for one appropriation	Crystal Reports 2013 PeopleTools 8.4.9 USAS (ext webapp) SharePoint 2016 Excel Outlook
3	Insurance Vendor Admin Payments Process	Process XBA reports and vouchers to pay insurance vendor administrative payments.	Monthly	12 vouchers monthly	4	<50 per vendor	PeopleSoft 9.0 - ERS online USAS
4	Insurance Payment Vouchers for insurance claims	Process vouchers to pay claims from various insurance vendors.	Daily, weekly, bi-weekly and monthly	16 total	3	<50 per claim	Vendor websites USAS Outlook

DEMO EXAMPLES

PROFESSIONAL SERVICES AVAILABLE



Solutions Architects | Account Executives
Account Managers



Business Analysts | System Engineers
Project Managers | Training Specialists



Application Analysts | Support Technicians

Professional Services or Augment Your Staff

- ✓ Assessments
- ✓ Consulting
- ✓ Process Analysis
- ✓ Configurations
- ✓ Integration
- ✓ Data Migration
- ✓ Project Management
- ✓ Training
- ✓ Support



slido



What would you like to learn more about next time regarding Laserfiche?

ⓘ Start presenting to display the poll results on this slide.

slido



If not listed, please add what you would like to learn more about

ⓘ Start presenting to display the poll results on this slide.

NEXT STEPS

Schedule Consultation

<https://calendly.com/ablue-mcci/30min>

Contact Us

Alexis Blue

ablue@mccinnovations.com

850-701-0725 x 1656

Idaho State Contract Details

(Existing Users or Agencies looking to learn more)

<https://purchasing.idaho.gov/statewide-category/mcci-llc-sbpo20231555/>

