

Laserfiche

SharePoint Integration Solutions Guide

Here at Laserfiche, we believe that our customers are the best source of information about our enterprise content management (ECM) solutions. After all, they're the ones using it to transform their organizations every day.

Laserfiche has always developed on top of Microsoft technologies to support close integration with industry-standard platforms, allowing our customers to build on their existing investments in Microsoft technology and staff skill sets.

This collection of real-world solutions provides an overview of how customers around the world are gaining value from the Laserfiche SharePoint Integration, which is designed to enable:

- ▶ Rapidly deployed transactional content management.
- ▶ Paper-based capture and enhanced document storage.
- ▶ DoD 5015.2-certified records management.
- ▶ Enterprise search and classification.
- ▶ Collaboration and business process management.

Take a look at how Laserfiche customers are using the Laserfiche SharePoint Integration to deploy a wide variety of initiatives, including:

- ▶ Medical records management.
- ▶ RFP/vendor selection.
- ▶ Employee forms submission.
- ▶ Student financial aid portal.
- ▶ Case management.
- ▶ And more.

Medical Records Management

Spindletop MHMR Services

With more than 8,000 patients a year and upward of 400 employees, Spindletop Mental Health Mental Retardation (MHMR) Services was having **difficulty responding promptly to records requests.**

Over 80,000 files resided in a hardcopy storage facility that cost more than \$2,000 a month to maintain. And even with six full-time staff members dedicated to

managing hardcopy documents, some records took as long as three days to locate and cost \$4 each to retrieve and deliver; others were lost for good.

Realizing that an enterprise content management (ECM) system would **ensure access to high-quality services** in a more cost-effective way, Spindletop turned to Laserfiche for help.

“ We’ve increased productivity, and morale has jumped in every department that uses Laserfiche. We’re very happy with the way Laserfiche has enabled us to expand our use of SharePoint. ”

SOLUTION

Spindletop was already leveraging SharePoint for the company's intranet site. "We wanted to centralize access to patient records without forcing our employees to go out of their way," explains Jerry Carnley, CIO at Spindletop.

Spindletop implemented the Laserfiche SharePoint Integration, which met its content management needs in three key ways:

- ▶ Seamlessly added document imaging functionality to SharePoint.
- ▶ Dramatically expanded the amount of content that can be stored online.
- ▶ Provided instant search across content stored in Laserfiche and SharePoint.

RESULTS

By implementing the Laserfiche SharePoint Integration, Spindletop transformed the way it manages content in the four following ways:

- ▶ **Instant search and retrieval.**

From any internet access point, staff can instantly locate scanned records by using the "Electronic Imaging" tab on Spindletop's SharePoint intranet site. Offsite employees have access to the Laserfiche digital records repository through a password-protected Citrix site.

- ▶ **Sure-fire security.**

Because Spindletop's SharePoint intranet uses full Laserfiche security enforcement, employees are granted access to records by department. Employees can view the records for their own clients, but restricted patient, employee and financial information remains confidential.

- ▶ **Easy and efficient scanning.**

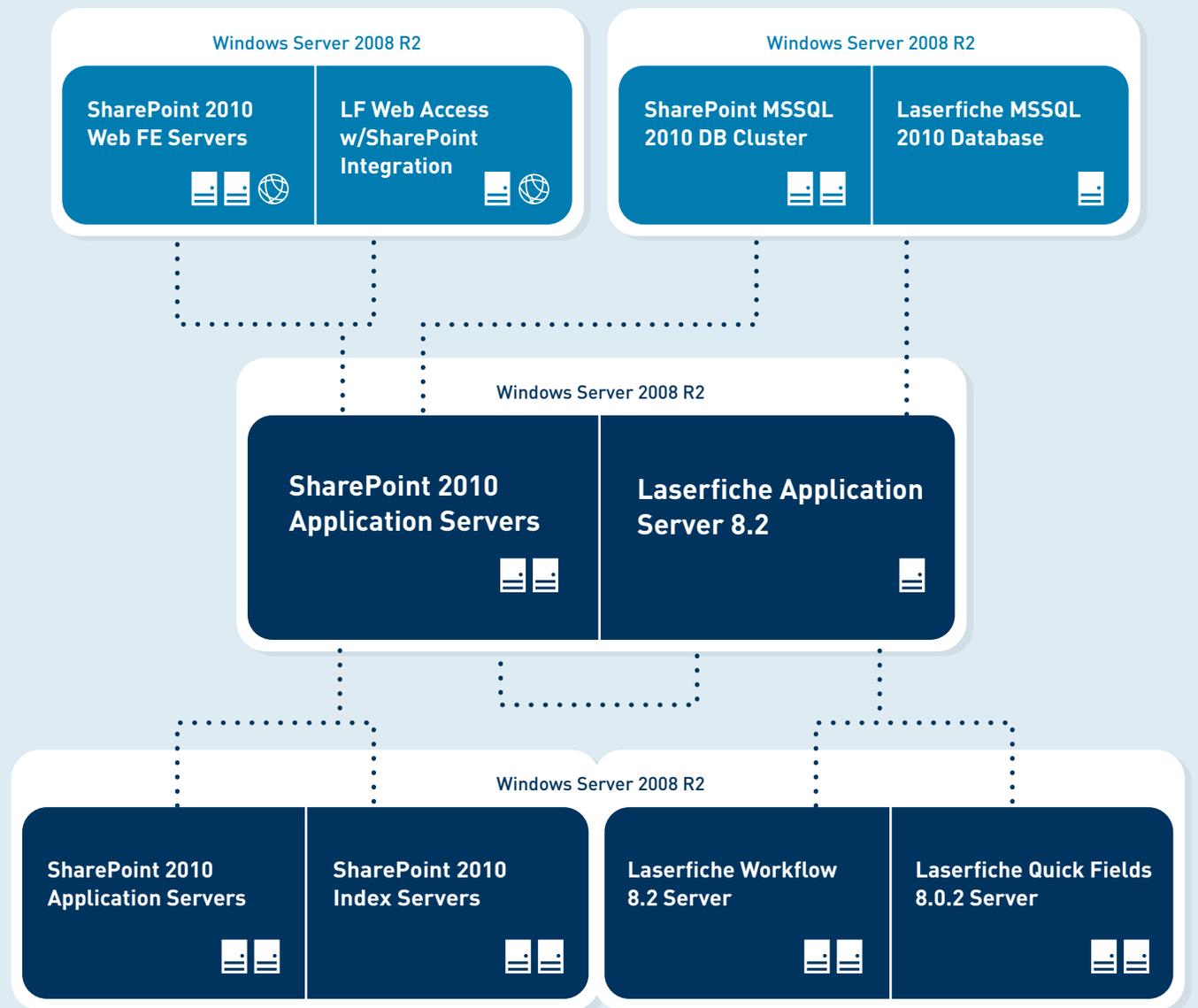
Laserfiche templates enable employees to scan ten times more content than they could before the custom templates were implemented.

- ▶ **Time-saving automation.**

When new content is scanned into the system, Laserfiche automatically populates template fields and generates and organizes new folders and subfolders. Because each client has between six and eight subfolders with a total of 25-52 documents to be scanned, this eliminates redundancy and extra work.

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Spindletop's Content Management Infrastructure



EAST TEXAS BEHAVIORAL HEALTHCARE NETWORK

The East Texas Behavioral Healthcare Network (ETBHN) is comprised of eleven mental health and mental retardation centers that cover 70 counties in Texas. It was established in 1998 as a response to the unique challenges these organizations face in delivering care effectively and efficiently to consumers living in the region.

ETBHN has been very effective in developing economies of scale, assisting with quality of services and delivering training services for its member centers. As such, ETBHN took note when Spindletop MHMR Services, one of its members, selected Laserfiche to complement its SharePoint implementation and support its Anasazi EMR system.

According to Spindletop's CIO Jerry Carnley, "We chose Laserfiche because it is cost-effective and aligns its technical architecture with that of key Microsoft initiatives such as the .NET

framework, Windows Workflow Foundation and Microsoft Management Console in order to simplify system administration."

Charles E. Beard, President of Dynasource, the Laserfiche reseller in charge of ETBHN's implementation of the Laserfiche SharePoint Integration, notes that Spindletop's CIO was instrumental in showing ETBHN the value of the integrated solution. "He had the enthusiasm and tenacity to say 'Here's what we've done, we need to get this out to everybody,'" Beard explains, adding that ETBHN decided to implement Spindletop's solution across the board in December 2010.

"ETBHN wanted a standardized application for each department that would offer standardized deployment across locations," Beard adds. "Out of multiple competitors, Laserfiche was the only one with a single point of contact to access patient records through SharePoint."

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RFP/ Vendor Selection

Virginia Port Authority

The Virginia Port Authority hired Angela Ellis as its SharePoint Administrator in 2007, but it wasn't long before her boss, Deputy Executive Director of Administration and CFO Rodney Oliver, enlisted her to start looking into enterprise content management (ECM) solutions.

"Our records management plan was very inefficient," Ellis explains. "We'd print out documents, process them by hand and then file them in cabinets. We had a whole warehouse dedicated to file storage, containing all kinds of old documents in

Bankers Boxes stacked nearly to the ceiling that we didn't have time to properly manage."

Because the Port Authority relies so heavily on the document workspaces in SharePoint, it wanted to find an **ECM solution with a seamless SharePoint integration**. "I was the lead on the team that built our RFP," Ellis says. "In the end, we had more than 400 requirements and 24 vendors vying for our business. The SharePoint integration was our top concern."

“ Most of our users don't even know they're using Laserfiche. The integration enables us to access all our information from SharePoint without having to train our users on the new Laserfiche system. ”

SOLUTION

By integrating Laserfiche with SharePoint, the Port Authority now has the ability to collaborate on documents, retain them electronically, and efficiently manage and dispose of digital records—all while giving users access to content through the SharePoint interface.

“Laserfiche has dramatically reduced the flow of paper throughout the organization,” says Ellis. “It’s opened up space for new offices and enabled us to tear down an entire warehouse for profitable use!”

But the cost and space savings aren’t the most significant benefits the Port Authority has realized as a result of its Laserfiche implementation. By acting as integrative middleware, Laserfiche allows users at the organization to access information in the environment with which they’re already familiar: SharePoint.

“The Port Authority’s had SharePoint for close to ten years, so people are pretty familiar with it,” says Ellis. “Most of our users don’t even know they’re using Laserfiche. With the integration, our content is searchable on an enterprise level, and the results are returned to users transparently through SharePoint. It enables us to access all our information from one central location without having to train our users on a new system.”

PROCESS IMPROVEMENTS

With Laserfiche in place, the Port Authority has started using it to streamline the RFP and vendor selection process, which used to be manual and paper-based.

Today:

- ▶ Proposals are submitted electronically and automatically routed into SharePoint.
- ▶ Proposals are posted to a workspace in SharePoint for contract evaluation, scoring, changes and selection.
- ▶ Once the collaboration phase is finished and the contract is finalized, it is automatically pulled into Laserfiche, where it is retained according to contract retention schedules.
- ▶ From SharePoint, users can access the contract by clicking on a URL that takes them directly to the document stored in Laserfiche. The URL placeholder in SharePoint ensures that the data is synchronized between the two systems, simplifying version control.
- ▶ When searching for a contract, users run a search in SharePoint that seamlessly provides results from both the Laserfiche and SharePoint repositories.

“Even employees who aren’t technologically inclined appreciate the efficiency of our new process,” says Ellis. “In general, having real-time information available in a central location has been one of the most important process improvements our organization has received as a benefit of this project.”

Employee Forms Submission

Emirates National Oil Company

When it came to paper records, Dubai's Emirates Petroleum Product Company (EPPCO) used to rely on file cabinets. Imaged documents, meanwhile, were stored on a shared "U:" drive, and electronic content was managed in SharePoint.

This lack of a centralized content management strategy was inefficient, costly and prevented the automation of paper-based business processes. EPPCO needed **a standard systems architecture and methodology** for enterprise-wide content management.

According to Sina Khoory, Group IT Manager for Emirates National Oil Company (ENOC), EPPCO's parent company, "Using Laserfiche, EPPCO has gained centralized control over its information. Laserfiche's powerful workflow tools and the Laserfiche SharePoint Integration have **simplified information sharing** and **automated operations** between departments."

In particular, EPPCO's internal audit department has saved time and money by automating the submission of its Employee Acknowledgement and Conflict of Interest forms, which all 1,500 EPPCO employees needed to sign and submit to the department each year.

Ram Mohan, Manager of ENOC's Planning and Performance Management Division, explains that the Laserfiche SharePoint Integration allows

employees to scan these forms directly into SharePoint, where they are converted into PDFs and automatically filed in the correct HR folders in the Laserfiche repository.

Mohan calculates that EPPCO realized a **full return on its Laserfiche investment in just eight months**. "By using Laserfiche to scan and store paper files, we save at least 6,000 hours of staff time a year, which translates to US \$240,000. We've also been able to eliminate US \$28,800 in paper storage costs per year."

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Student Financial Aid Portal

Oklahoma Christian University

In the past, Oklahoma Christian University's financial aid department was forced to store a mountain of paperwork in a large file room. Documents were frequently lost, misfiled, damaged, incomplete or unavailable, which was frustrating for staff, students and parents alike.

By integrating Laserfiche with its SharePoint-based Web portal, the university has enabled students to **complete and submit financial aid documents online**, as well as view their financial aid status and see which documents have been received or are incomplete.

"Giving students access to financial aid information via the Laserfiche SharePoint Integration has improved student satisfaction with the financial aid process while reducing the number of inquiries received by the financial aid department and allowing staff to focus on more complex

aid issues," explains John Hermes, Vice President of Information Technology at Oklahoma Christian University.

In addition, by integrating Laserfiche with Datatel, the university's ERP system, staff can quickly locate documents associated with the student without leaving their ERP screen. This has greatly reduced the amount of time spent on each request for assistance and allowed for first-call resolution that was practically non-existent prior to implementing Laserfiche.

"Implementing Laserfiche and having an entire office up and running proficiently on the system within just a few days speaks volumes," says Hermes. "IT staff was very impressed with the **ease of administration** and how smoothly the implementation has gone. The **ease of deployment** was most helpful in the successful adoption of the users."

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Case Management

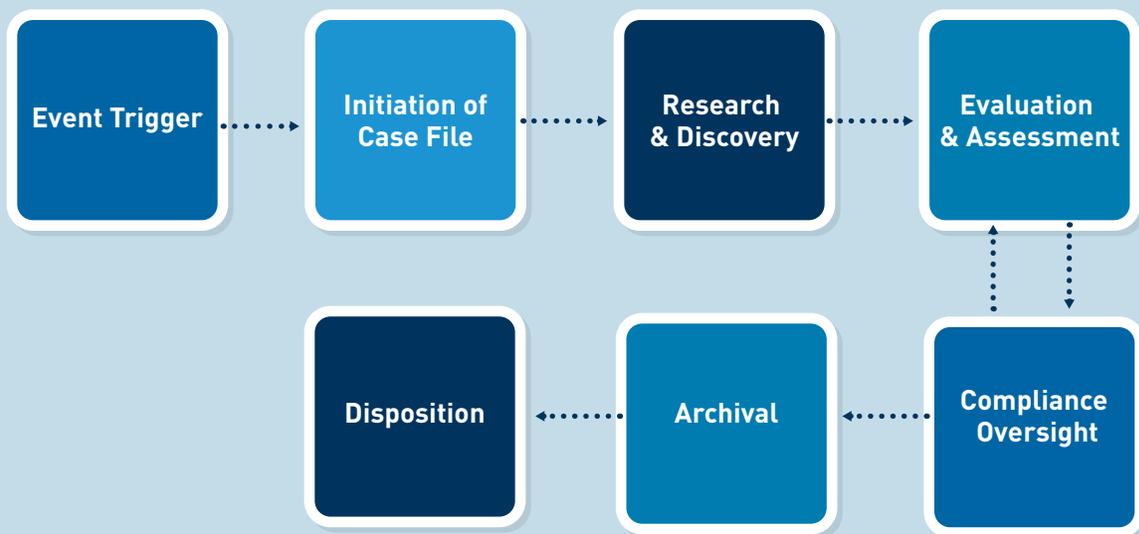
City of Buffalo, NY

In 2009, Buffalo's legal department, which had already invested in Laserfiche to scan and store archived case files, implemented a new case management system: Corporate Legal Standard (CLS), a Web-based system built on the Microsoft SharePoint platform.

Daryl Springer, Buffalo's IT Manager, says, "Scanning large volumes of closed case files through SharePoint into Laserfiche maintains the user experience in SharePoint, which is crucial for us."

He continues, "We **minimized costs** by using the out-of-the-box Laserfiche SharePoint Integration along with Laserfiche Web Access, a thin-client solution that provides online content management capabilities and remote repository access. In effect, Laserfiche acts as '**integrative middleware**' to support the legal department's need to access—via SharePoint—closed files that were initially created in the CLS program."

CASE MANAGEMENT FLOW



Product Overview

How do you achieve rapid deployment of an ECM solution? By configuring, not customizing.

The Laserfiche SharePoint Integration provides a configurable horizontal framework that centralizes control of physical and electronic business records spread across disparate content repositories, automates processes for improved efficiency and ensures that data is consistent, reliable, risk-managed, useful and available.

Unlike other SharePoint integrations, the Laserfiche SharePoint Integration offers more than just a collection of Web parts or standalone

imaging/capture capabilities. It provides a 100% Microsoft stack-driven, seamless two-way integration with SharePoint 2010 that immediately delivers concrete business value.

Laserfiche offers rapidly deployed transactional content management that, together with SharePoint 2010, transforms productivity by speeding collaboration; enabling functional, repeatable processes that take user preferences into account; managing documents, multimedia content and records; and providing insight into business processes.

TOGETHER, MICROSOFT AND LASERFICHE FILL SHAREPOINT 2010 ECM WHITESPACE:

- ▶ **SharePoint 2010 content becomes dynamic** with quick integration of line-of-business and legacy applications into ECM workflows using Windows Workflow Foundation and the .NET framework, solving transactional document problems and achieving a rapid ROI.
- ▶ **Federated search** retrieves documents from SharePoint pages using both the SharePoint search across repositories and Laserfiche's comprehensive metadata search, delivering superior flexibility and transparency.
- ▶ **Content distribution to a distributed workforce** becomes easy with SharePoint Mobile Access support, which enables browsing of content stored in the Laserfiche ECM repository from mobile Web browsers.
- ▶ **Centralized, at-a-glance access to data from all your primary applications** is available with a new ADO.NET provider that enables access to the Laserfiche ECM repository with SharePoint 2010 Business Continuity Services and Windows SharePoint Services.
- ▶ **DoD 5015.2-certified transparent records management** automates business processes including records classification and filing, typically the most expensive component of records management, and simplifies the management of content created through SharePoint 2010.
- ▶ **Records management document categorization** is enhanced through the use of SharePoint 2010 Business Connectivity Services, ultimately reducing the cost of compliance on an enterprise level.

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