

# Buy A&M Documents - Laserfiche

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The Buy A&M Laserfiche repository allows viewing and print access to historical purchasing and invoice information for purchasing documents formerly housed in the Buy A&M System. Limited access to the repository will be granted to Buy A&M participating Member's, and will provide users with the ability to research or audit purchases executed through this system.

## Laserfiche Hierarchy

The hierarchy for storage of Buy A&M information in Laserfiche is:

**System:** BAM

**Attachments:** *All attachments*

**Fiscal Year:** *FYnnnn*

**Document Type:** *Invoices, Purchase Orders, Bids*

**Buy A&M Org:** *AM01, AM02, etc*

**Vendor:** *Vendor Name*

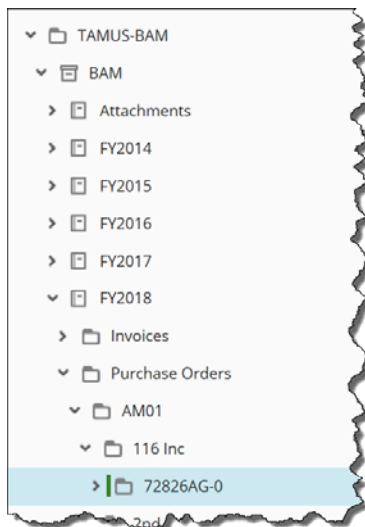
**Document Number:** *multiple formats*

There are a few exceptions to this hierarchy:

- Attachments – All attachments are stored in a single folder, regardless of where they were originally attached. This is due to fact that a single attachment can belong to multiple documents.
- Receipts – Receipts are not documents within Buy A&M, therefore they are not documents within the Laserfiche repository. Receipt information will be included with the PO document and any attachments associated with receipts will be notes as shortcuts on the PO document and stored in the attachments folder.
- Quotes – Quotes only exist as a part of a Bid and are not true documents in Buy A&M. To store the quote information in Laserfiche, a Quote 'document' has been created containing all relevant information; these created documents will be listed under the specific Bid document.

Shortcuts to related attachments will be listed below each document.

Based on that hierarchy, a PO issued by System Offices (AM01) in FY 2018 would be stored:

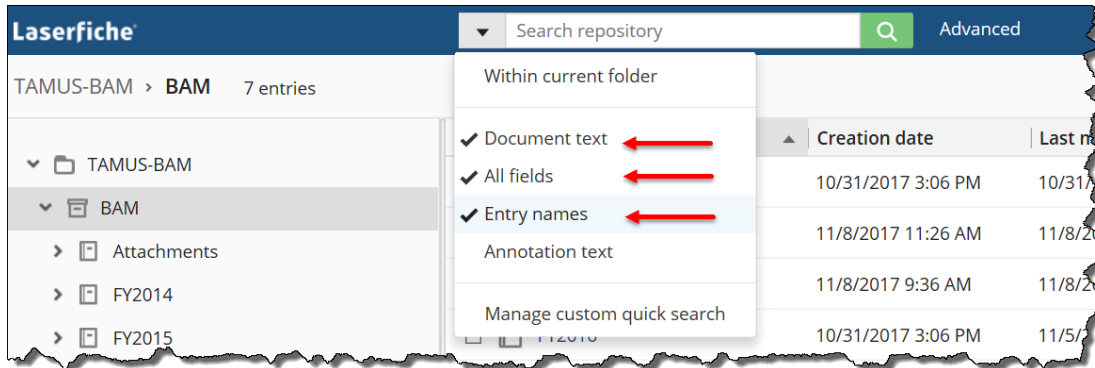


### Search the Laserfiche Repository

While a user can drill down through the hierarchy, the search capabilities in Laserfiche allow a user to find a document easily without knowing exactly where it is stored.

The user can search the entire Repository by the following:

- Click the arrow on the search pane
- Then select multiple options on the search window
- **–And- not** selecting 'Within current folder'

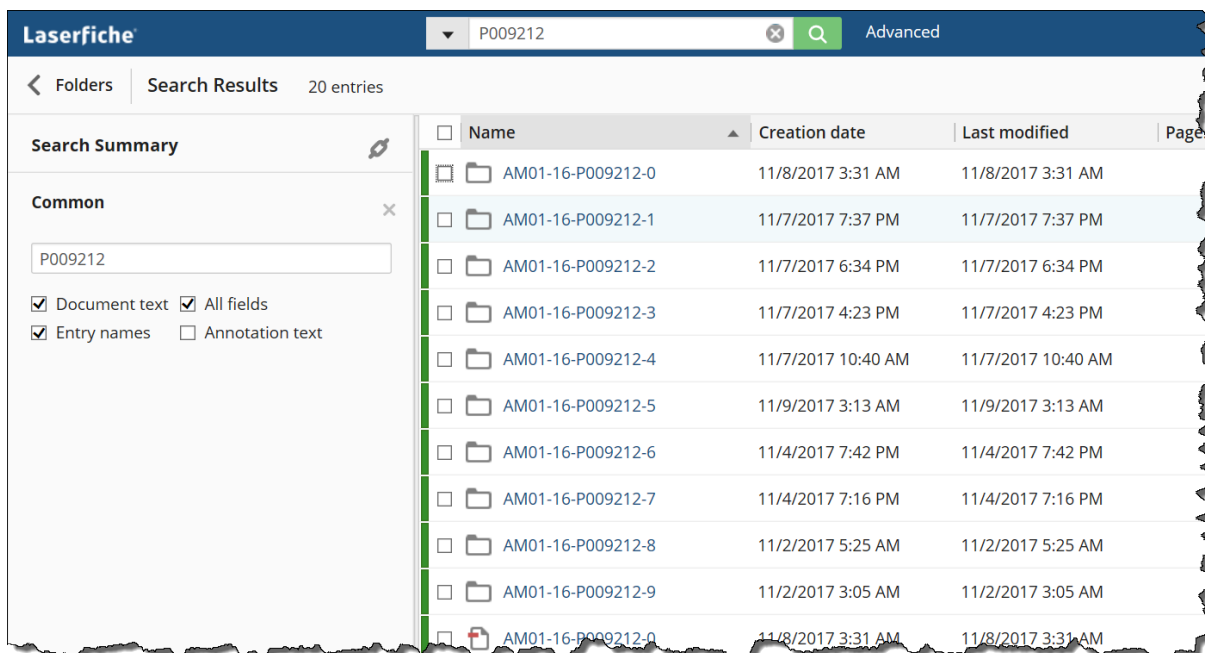


These changes will remain in effect until the user changes them again.

### Search by Document Number

To search for documents by document number, do the following:

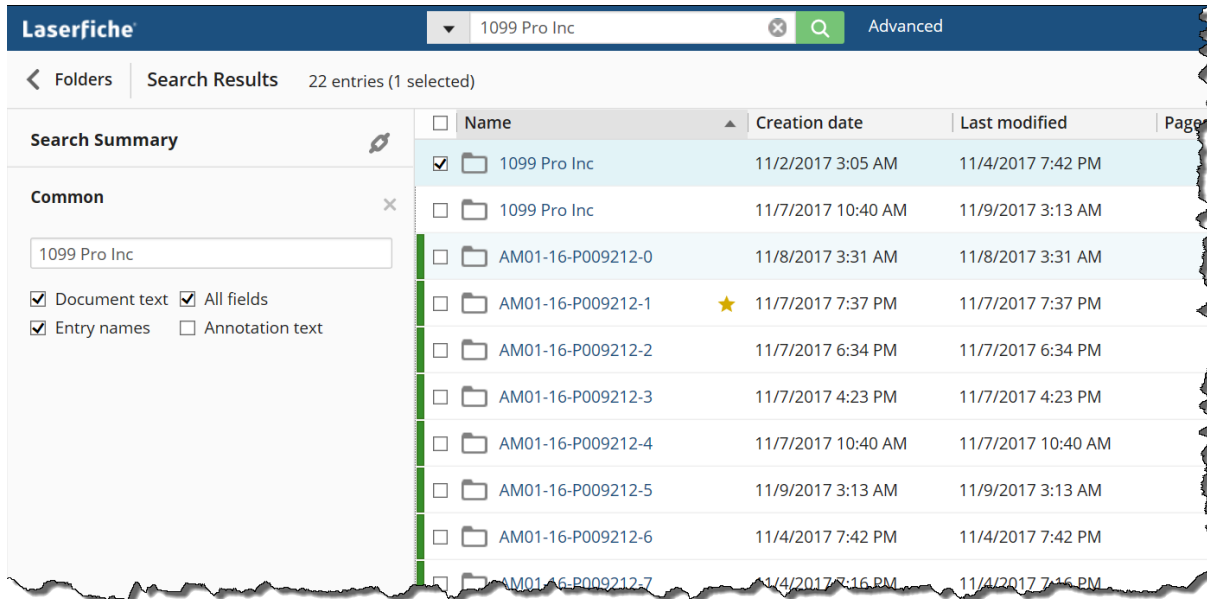
- Enter all or part of a document number
- Click the magnifying glass icon
  - All matches for that document are displayed in the search results



## Search by Vendor Name

To search for documents by vendor name, do the following:

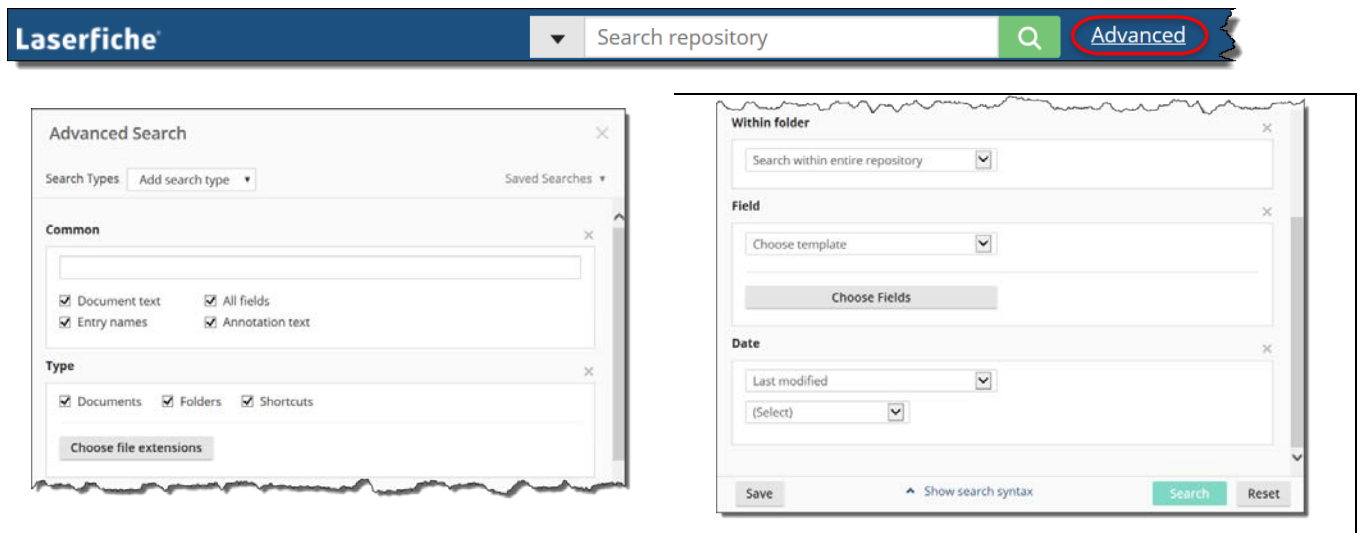
- Enter all or part of a vendor name
- Click the magnifying glass icon
  - All matches for that document are displayed in the search results



Note: Because both Invoices and PO's are associated with vendors, both document types will be displayed when searching by vendor name.

## Advanced Search

- Click the 'Advanced' option to the right of the search pane to bring up additional search options:

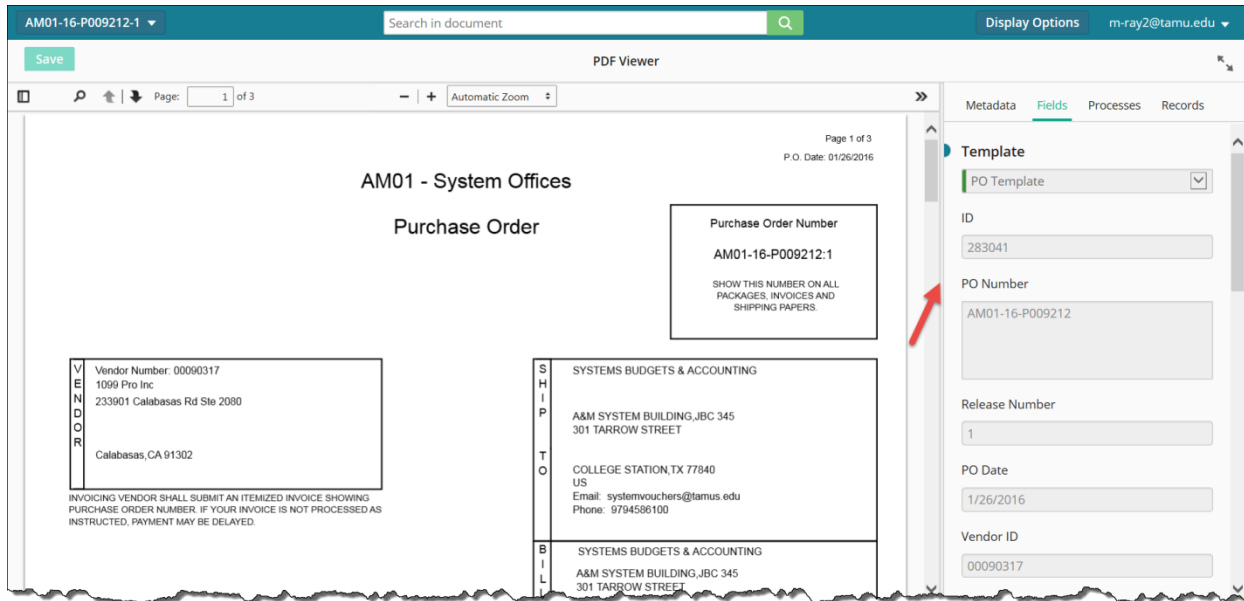


While the simple search will work for most cases, the advanced search provides the option of searching based on template fields and saving a search for repeated use.

### Viewing Documents

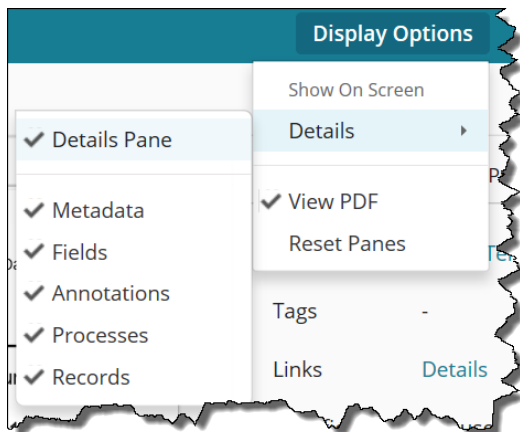
Once the search results are displayed, the user can select the document to display it. Because PO numbers are unique with the BAM environment, typically, only a single PO will be displayed. For Master Orders, the original PO number will be displayed and appended by '-nnnn', where 'nnnn' is the release number off the Master Order. In BAM, the original PO number and the release number were separated by a colon (:).

Selecting a PO displays a PDF copy of the PO along with template fields related to this PO.



To change the display distribution between the fields and the document, the bar between the two can be pulled to the left or right.

- Click on the Display Option
- Then click Details and uncheck 'Details Pane'



The details pane can be removed from the view completely.

## Buy A&M Documents - Laserfiche (cont'd)

The PO document in Laserfiche, is virtually the same as the PDF version in BAM. An additional page has been added to each PO containing:

- Receipts – listing of all receipts created
- Invoice – listing of all invoices including payment information
- Attachments – listing of all attachments related to this PO
- Notes – listing of any notes entered on the PO in BAM

AM01-16-P009212-1

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PDF Viewer

Page:  of 3
Automatic Zoom

Page 3 of 3

Purchase Order Number: AM01-16-P009212:1

**Additional Information**

PO Type: Release	Type Code:
Alternate ID (FAMIS PO): 346743A	REF A:
User Ref / Ref 4:	REF B:

**Receipt Information**      PO Receipt Summary

Receipt #	Status	Description	Dept/Loc	Receipt Owner	Entered Date
0051291	5CA - Approved for Invoice	Auto-generated RPA Receipt	01RSKM/BLANK	Kevin McGinnis	01/26/16 10:07:43AM

**Invoice Information**

Invoice #	Status	Description	Vndr Grp	Invoice Amount	Vendor	Invoice Date	Voucher #	Paid-Bank/Check
345704	4IP - Paid	DEPOSIT FOR PRINT MAIL & FILE SERVICE	01	\$9,000.00	00090317	12/01/2015	01-2016-2605048	CHK-01-16-356008

**Attachments**

File Nbr	File Name	Laserfiche Relative Location
91234	BAM INV P009212 - 1099 PRO - PRINT.pdf	BAM/Attachments/AM01/091
<b>TOTAL:</b>		<b>1</b>

**PO Notes**

Note Date	User	Note
01/26/2016	Lona Reynolds	ESTIMATED AMOUNT AND PER THE CONTRACT THE DEPOSIT IS DUE PRIOR TO VENDOR PRINTING/MAILING.
01/26/2016	Lona Reynolds	NOTE TO A/P: PLEASE REDUCE THE PERMIT TO PAY AMOUNT DOWN TO \$9000 TO MATCH THE AMOUNT ON THE INVOICE.
01/26/2016	Lona Reynolds	1. DO NOT MAIL CHECK. 2. PLEASE CALL 458-6100 WHEN CHECK IS READY FOR PICK UP. 3. PLEASE RUSH.

## Buy A&M Documents - Laserfiche (cont'd)

While invoices in BAM were documents, they did not exist as true document in the same manner as a PO. For Laserfiche, a printable document has been created containing information from BAM related to the invoice :

- Invoice Summary – basic invoice information
- Payment –specific information related to payments made to vendors
- Attachments – listing of all attachments related to this invoice
  - This would include the actual vendor invoice
- Notes – listing of any notes entered on the invoice in BAM

Invoice-8114A (2014-08-... ▼)
Search in document
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Invoice Number: 8114A
Page 1 of 1

Invoice Summary Information			
Invoice Number:	8114A	Invoice Status:	4IP - Paid
Invoice Amount:	\$1,425.20	Invoice Date:	08/01/2014
Paid-Bank/Check:	CHK-01-14-350490	Effective Date:	08/07/2014
Voucher #:		Payment Date:	08/26/2014
Vendor:	00021476 - 3RD I PROCUREMENT	Invoice Description:	HUB SPOT BID FAIR-OFFICE SUPPLIES
BAM GUID:	F3FAD3A9-6EDA-4F4F-A748-E8EE03012461		

Payment Information					
Check Number	Vendor Number	Date Paid	Amount Paid	Discount	Check Status
CHK-01-14-350490	00021476	08/26/2014	\$1,425.20		A

Attachments		
File Nbr	File Name	Laserfiche Relative Location
8011	BAM INV P002256.pdf	BAM\Attachments\AM01\008
<b>TOTAL:</b>		<b>1</b>

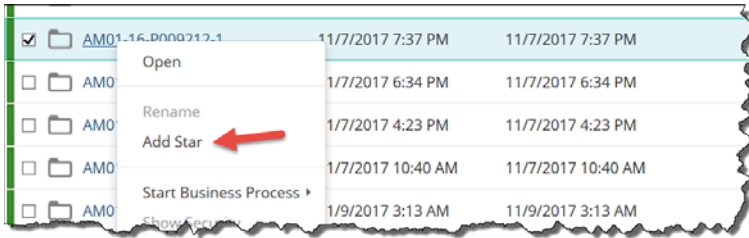
Notes		
Note Date	User	Note

Purchase Order Information	
Purchase Order Number: AM01-14-P002256	Buyer: Kathy Snider
PO Amount: \$1,425.20	PO Description: HUB PAPER BID
Vendor: 00021476 - 3RD I PROCUREMENT	
Vendor Remit-to Addr: Gwen Mitchell 4007 FLOYD ST HOUSTON, TX 77007-5721 US Email: gmitchell@3rdiprocurement.com Phone: 8322879949 ID: 23637	

### Favorites - Starred Documents

Users can mark documents for easy retrieval at a later date.

- Right-click on a document
- Select 'Add Star'

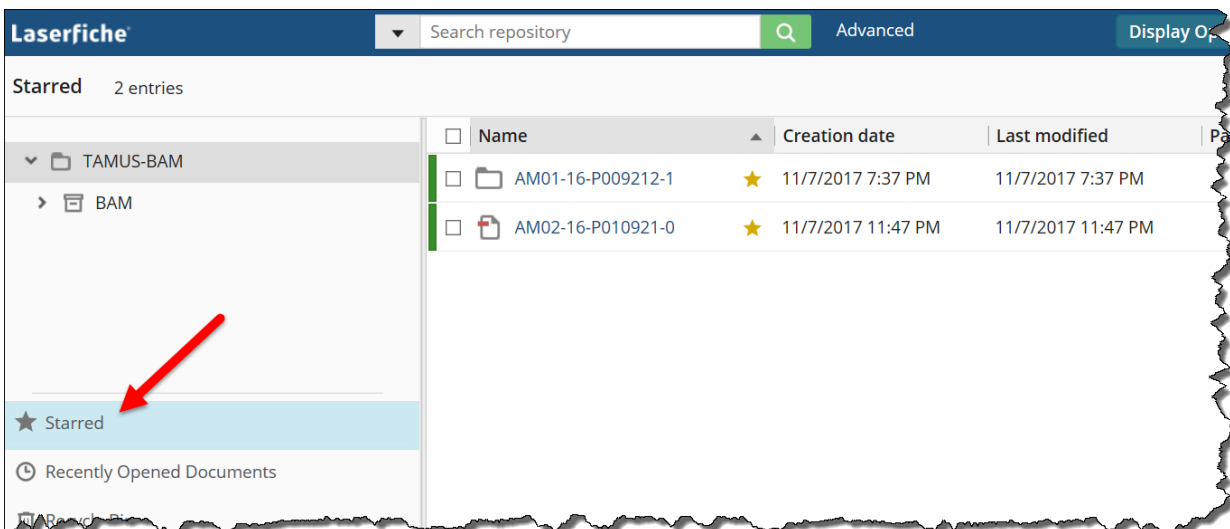


Once a document has been marked with a 'Star' as indicated below, it will be retrieved when the 'Star' option is invoked.

A screenshot of a document list interface. The document 'AM01-16-P009212-1' is highlighted and has a yellow star icon next to its name, indicating it is starred. The document list shows columns for Name, Creation date, Last modified, and Pages.

Name	Creation date	Last modified	Pages
AM01-16-P009212-0	11/8/2017 3:31 AM	11/8/2017 3:31 AM	
AM01-16-P009212-1	11/7/2017 7:37 PM	11/7/2017 7:37 PM	
AM01-16-P009212-2	11/7/2017 6:34 PM	11/7/2017 6:34 PM	
AM01-16-P009212-3	11/7/2017 4:23 PM	11/7/2017 4:23 PM	

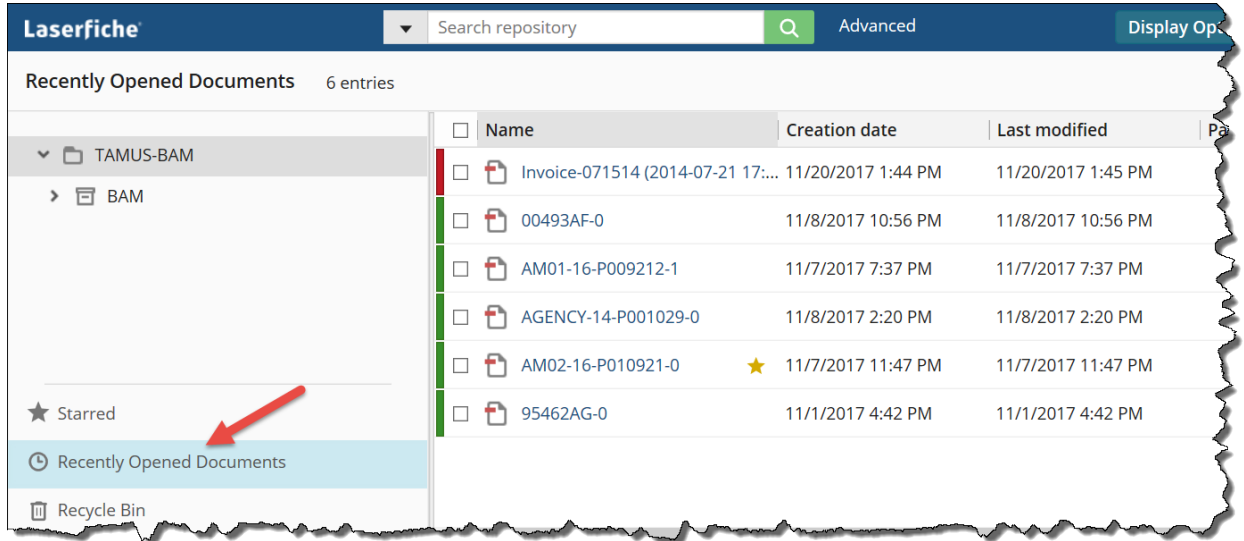
- Select the 'Starred' option on the main display
- Any starred documents will be displayed.



- Starred documents are specific to each user, so each user is able to maintain a listing of documents that they feel will be needed on a repetitive basis.

## Recently Opened Documents

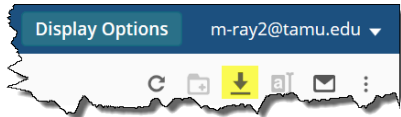
In addition to starred documents, the eleven most recent documents can be quickly accessed from the Folder Browser by choosing Recently Opened Documents.



## Printing Documents

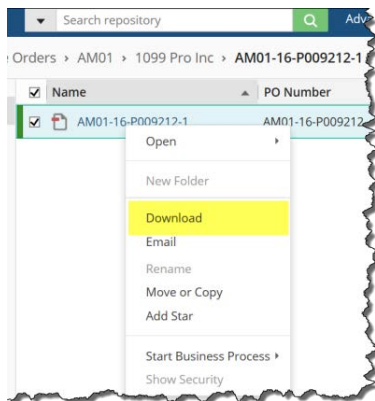
To print a document, it must first be downloaded from Laserfiche. To download a document:

- Select the 'Download' icon in the upper right portion of the screen.



Or

- Right-click on the document and select 'Download'

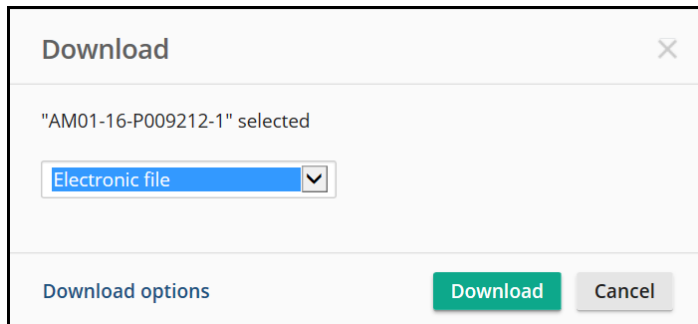




## Buy A&M Documents - Laserfiche (cont'd)

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A download window will be displayed:



- Select 'Electronic File'
- Click 'Download'. A prompt will be displayed giving the user the choice to open or save the document:

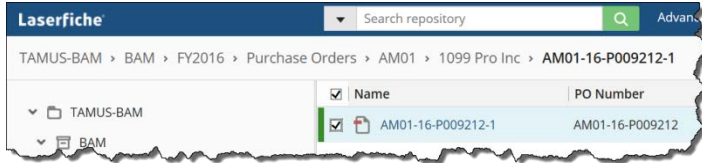


If the 'Open' option is selected, the document will open in Adobe and can then be printed from there.

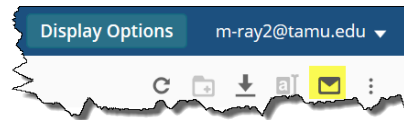
### Emailing a Single Document from Laserfiche

Documents may also be emailed from Laserfiche. To email a document:

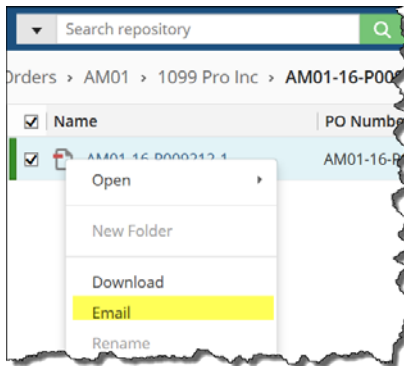
- Select the document to be emailed



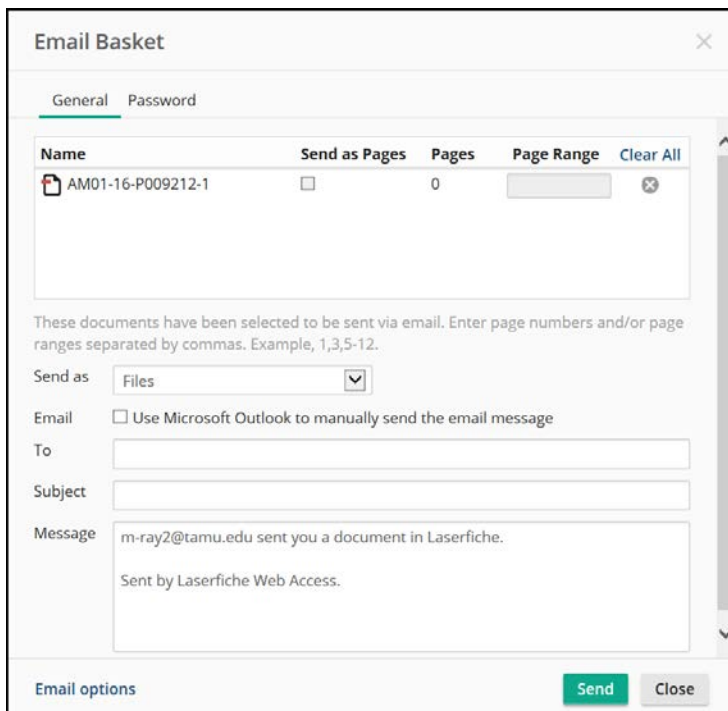
- Select the 'Email' icon in the upper right portion of the screen



- - Or - Right-click on the document and select 'Email'

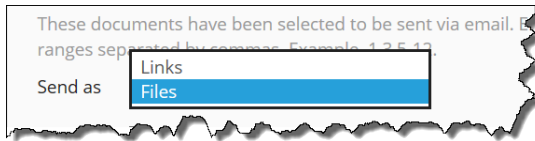


This will open a window to create an email:



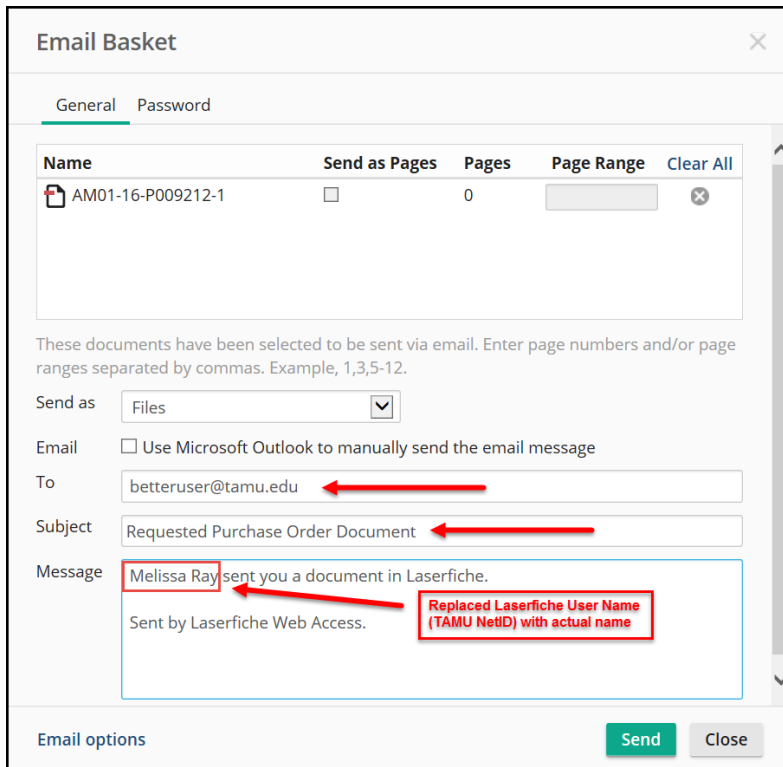
## Buy A&M Documents - Laserfiche (cont'd)

- User has the option to send the document as a file or a link.



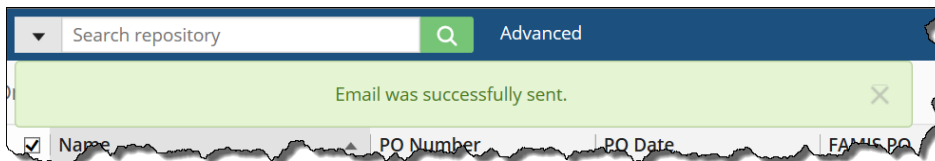
- Do not use the link option to send to recipients that do not have access to the Buy A&M Laserfiche Repository. The link will require that the recipient login to access the file(s).

Once the Email Basket window is displayed, the user can add the recipient's email, add a subject line and customize the message:



The 'Email Basket' window is shown with the 'General' tab selected. It contains a table with the following columns: Name, Send as Pages, Pages, Page Range, and Clear All. The table has one row with the name 'AM01-16-P009212-1', 'Send as Pages' set to 'Files', 'Pages' set to '0', and an empty 'Page Range' field. Below the table, there is a note: 'These documents have been selected to be sent via email. Enter page numbers and/or page ranges separated by commas. Example, 1,3,5-12.' The 'Send as' dropdown is set to 'Files'. The 'Email' section has a checkbox for 'Use Microsoft Outlook to manually send the email message' which is unchecked. The 'To' field contains 'betteruser@tamu.edu', the 'Subject' field contains 'Requested Purchase Order Document', and the 'Message' field contains 'Melissa Ray sent you a document in Laserfiche. Sent by Laserfiche Web Access.' A red box highlights the name 'Melissa Ray' in the message, with a red arrow pointing to it and a red text box that says 'Replaced Laserfiche User Name (TAMU NetID) with actual name'. At the bottom, there are 'Email options', a green 'Send' button, and a grey 'Close' button.

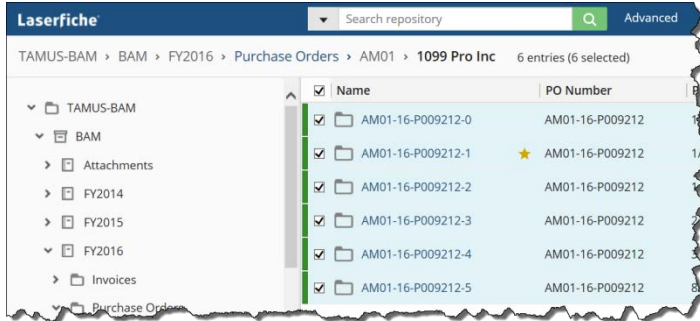
Once the edits have been completed, clicking 'Send' will send the email. Once the email has been sent, a confirmation message will be displayed in Laserfiche:



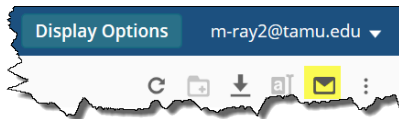
## Emailing Multiple Documents from Laserfiche

Documents may also be emailed from Laserfiche. To email a document:

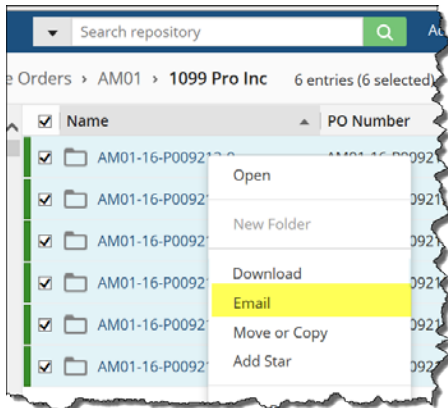
- Select the documents to be emailed



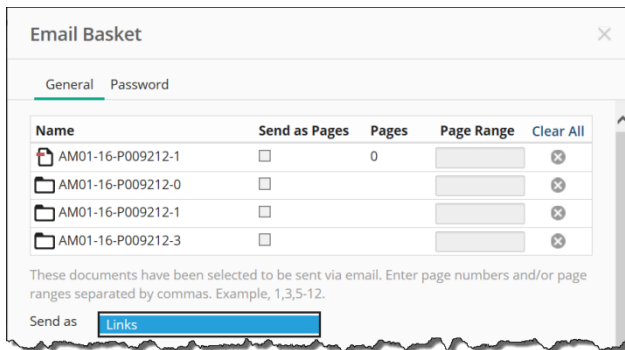
- Select the 'Email' icon in the upper right portion of the screen



- - Or - Right-click on the document and select 'Email'



Emailing multiple documents through Laserfiche only provides the option to send as links:

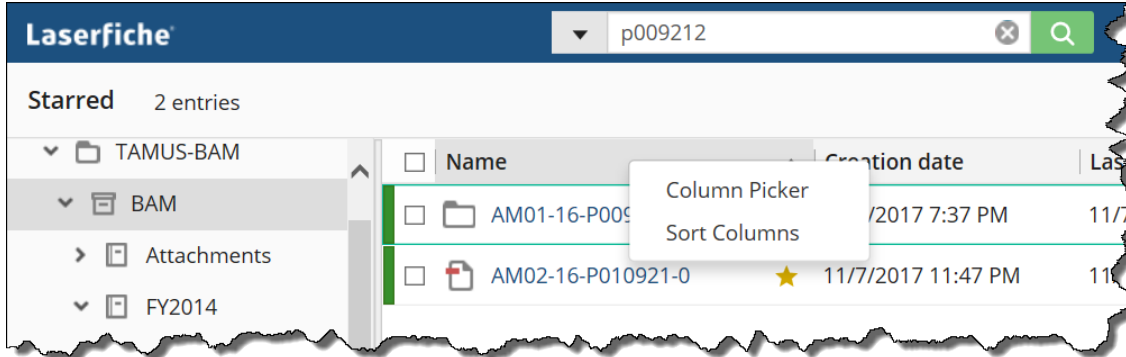


With this in mind, a better option would be to download the files and email them manually.

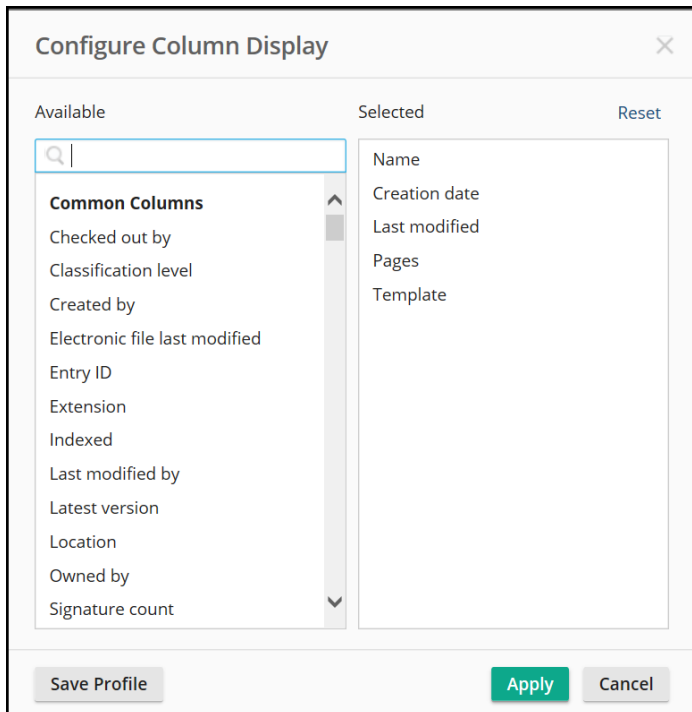
## Customizing the Columns Displayed

Users may also choose to customize the columns displayed in Laserfiche:

- Right-click on the column headings to display the options:



- Select the 'Column Picker' option to select the columns to display:



By selecting one of the Templates, the user can add columns that are specific to that template.

- Click an item in either list
- Drag it from one side to the other
  - This will move items from the 'Available' list to the 'Selected' list
  - or
  - Move items from the 'Selected' list to the 'Available' list.

## Buy A&M Documents - Laserfiche (cont'd)

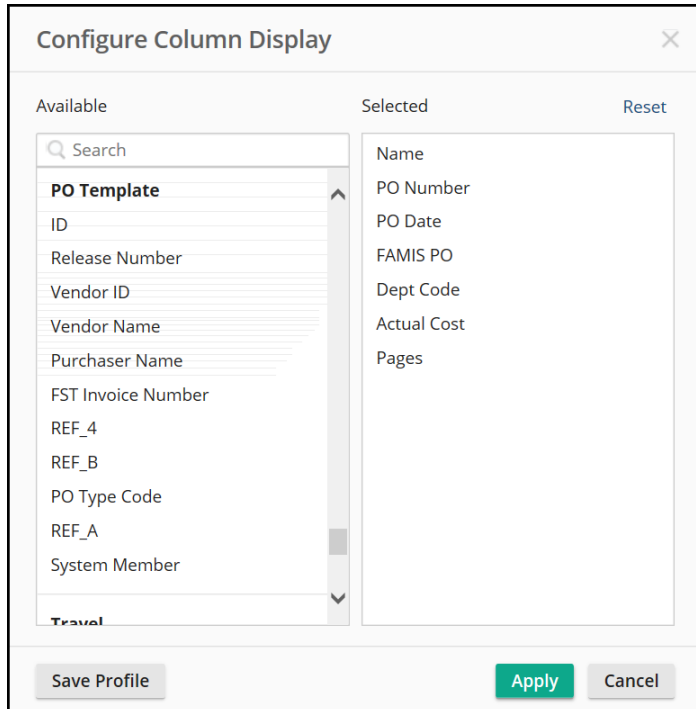
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To change the order of the columns:

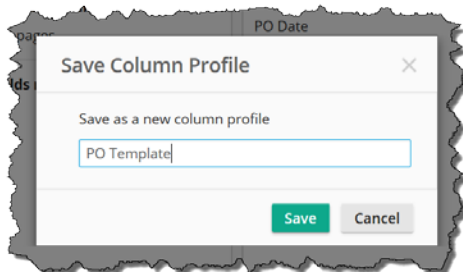
- Click an item within the 'Selected' list
- Drag item up or down to create the order desired.

Once all items have been moved:

- click 'Save Profile' to save this profile:

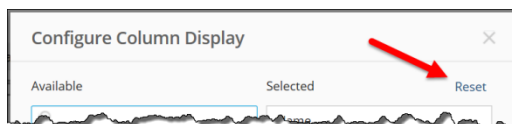


- Enter a name for the new profile in the window:



These column headings also now apply to this folder. To revert back to the original settings:

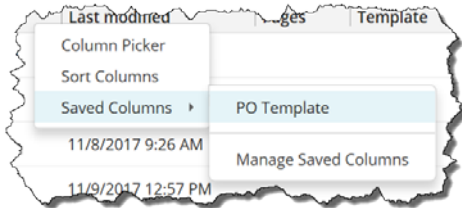
- Right-click on the column headings
- Select 'Column Picker' again
- Once the 'Configure Column Display' window is shown
  - Click 'Reset' to go back to the original headings:



## Buy A&M Documents - Laserfiche (cont'd)

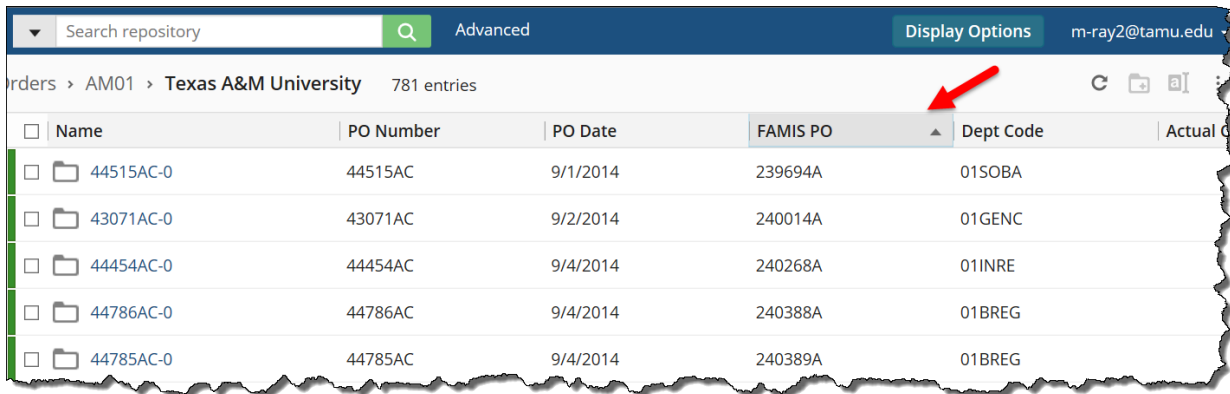
To use a saved configuration

- Right-click on the column headings
- Select 'Saved Columns'
- Then select the desired configuration



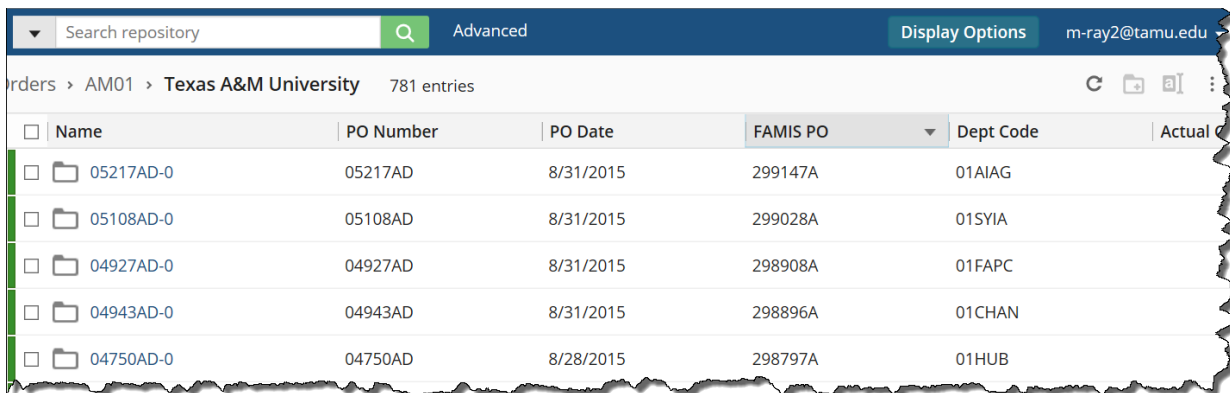
As the user drills down further into the folder, these headings remain. The columns will not be populated until the user has navigated down to the document level (where the templates have been used).

- Clicking on any of the columns will change the display to be sorted based on that column:



<input type="checkbox"/>	Name	PO Number	PO Date	FAMIS PO	▲ Dept Code	Actual C
<input type="checkbox"/>	44515AC-0	44515AC	9/1/2014	239694A	01SOBA	
<input type="checkbox"/>	43071AC-0	43071AC	9/2/2014	240014A	01GENC	
<input type="checkbox"/>	44454AC-0	44454AC	9/4/2014	240268A	01INRE	
<input type="checkbox"/>	44786AC-0	44786AC	9/4/2014	240388A	01BREG	
<input type="checkbox"/>	44785AC-0	44785AC	9/4/2014	240389A	01BREG	

- Clicking the column again will change the sort order:



<input type="checkbox"/>	Name	PO Number	PO Date	▼ FAMIS PO	Dept Code	Actual C
<input type="checkbox"/>	05217AD-0	05217AD	8/31/2015	299147A	01AIAG	
<input type="checkbox"/>	05108AD-0	05108AD	8/31/2015	299028A	01SYIA	
<input type="checkbox"/>	04927AD-0	04927AD	8/31/2015	298908A	01FAPC	
<input type="checkbox"/>	04943AD-0	04943AD	8/31/2015	298896A	01CHAN	
<input type="checkbox"/>	04750AD-0	04750AD	8/28/2015	298797A	01HUB	

The changes to the column headings will remain in effect for this user until they are changed.

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