

FAMIS Documents - Laserfiche

Accessing Laserfiche

There are two options for accessing Laserfiche, via the Web Client or the Laserfiche Desktop Client. Desktop Client access is available to those users that currently have the desktop client installed on their desktop, but the web access will be available to all users. The credentials used to access Laserfiche are the user's TAMU NetID and password or the user's system member credentials (dependent upon SAML access settings for each member).

Web Client

The Laserfiche repositories can be accessed with the following web link:

<https://it-lf-ecmweb.tamu.edu/laserfiche>

Save this link as a bookmark to go directly to the FAMIS Documents repository.

The screenshot shows a login interface with three main sections. The first section is 'TAMU NetID Accounts' with the text 'TAMU NetID Login Only (CAS)' and a blue button labeled 'NetID Login Only (CAS)'. The second section is 'System Member Login (Non-NetID)' with the text 'Corpus Christi, San Antonio, Tarleton State' and a green button labeled 'System Member Login (Non-NetID)'. The third section is 'AgriLife or PVAMU Accounts' with the text 'Select your appropriate login Button' and two buttons: a red one for 'TEXAS A&M AGRILIFE' and a purple one for 'PRAIRIE VIEW A&M UNIVERSITY'. At the bottom, it says 'Version 12 | © 2025 Laserfiche'.

TAMU NetID credentials

- Selecting NetID Login Only (CAS) will display the Central Authentication Service Login button
- Enter the NetID and password and click the 'Next' button
- DUO authentication is required; users will need to approve the request to access Laserfiche
- TAMU NetID passwords may be reset by clicking the 'Forgot your password?' button on the Aggie Account Gateway website: <https://gateway.tamu.edu/>

System Member Login

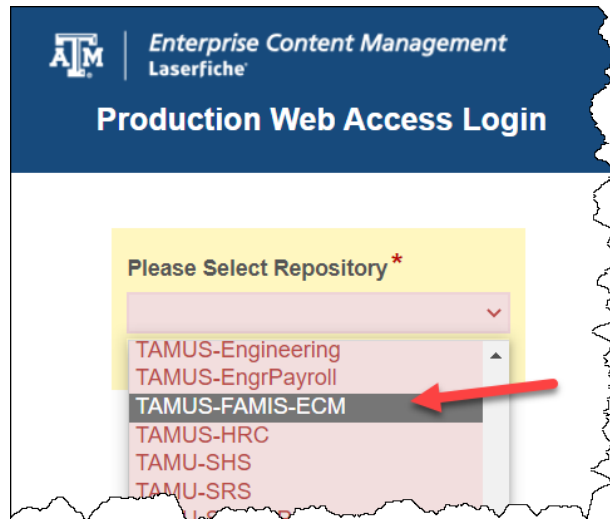
- Selecting System Member login (Non-NetID) will display a list of system member names.
- Enter the System Member ID and password and click the 'Next' button

FAMIS Documents - Laserfiche (cont'd)

- DUO authentication is required; users will need to approve the request to access Laserfiche

All Users

- On successful login to the Web Client, choose 'TAMUS-FAMIS-ECM' from the dropdown list of available repositories and click 'Submit'

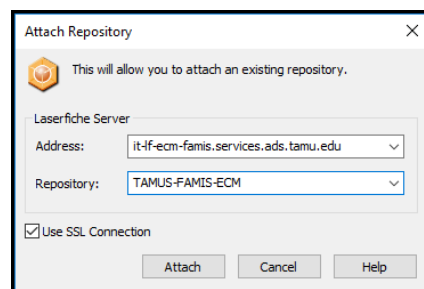


Desktop Client

Repository: TAMUS-FAMIS-ECM

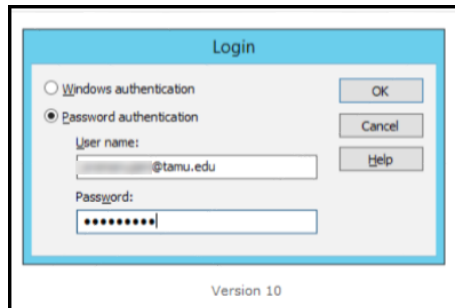
To use the desktop client for the FAMIS Documents, users must first attach to the repository.

- Launch the desktop client
- Click the '+ Attach' button
- Enter the following information for the FAMIS Documents repository:
 - Address: lf-so-sea.it.tamu.edu
 - Repository: TAMUS-FAMIS-ECM (this will need to be entered, it will not be available on the drop-down list at this point)
 - Check Use SSL Connection
 - Click Attach



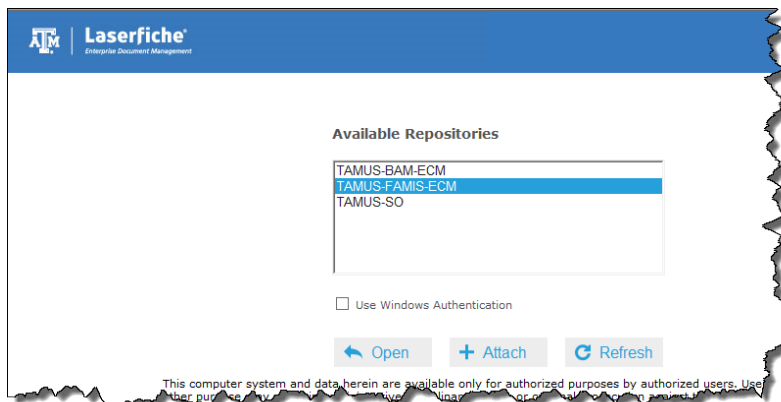
FAMIS Documents - Laserfiche (cont'd)

- Enter the following information on the Login Screen:
 - Select Password authentication
 - Username: <NetID>@tam.u.edu
 - Password: NetID password
 - Click OK

A screenshot of a 'Login' dialog box. It has a title bar 'Login' and three buttons: 'OK', 'Cancel', and 'Help'. There are two radio buttons: 'Windows authentication' (unselected) and 'Password authentication' (selected). Below the radio buttons are two text input fields: 'User name:' with the text '@tam.u.edu' and 'Password:' with a masked password '*****'. At the bottom, it says 'Version 10'.

- DUO authentication is required; users will need to approve the request to access Laserfiche

Users will now see TAMUS-FAMIS-ECM listed as an available repository when they launch the desktop client:



Repository: TAMUS-HRC

- Address: lf-so-sea.it.tamu.edu
- Repository: TAMUS-HRC
- Check Use SSL Connection
- Click Attach

FAMIS Documents - Laserfiche (cont'd)

Laserfiche Hierarchy

Reports are stored based on the TAMUS Member. Additionally, we have implemented a folder structure in Laserfiche to organize reports by the creation date and by report type. The hierarchy for storage of FAMIS information in Laserfiche is split into three main sections, User Reports, Security Reports, 1099 Reports, and HRIS Reports.

Repository: TAMUS-FAMIS-ECM

Master Folder: *Doc*

Document Type: *FAMIS*

Report Type: Reports ←

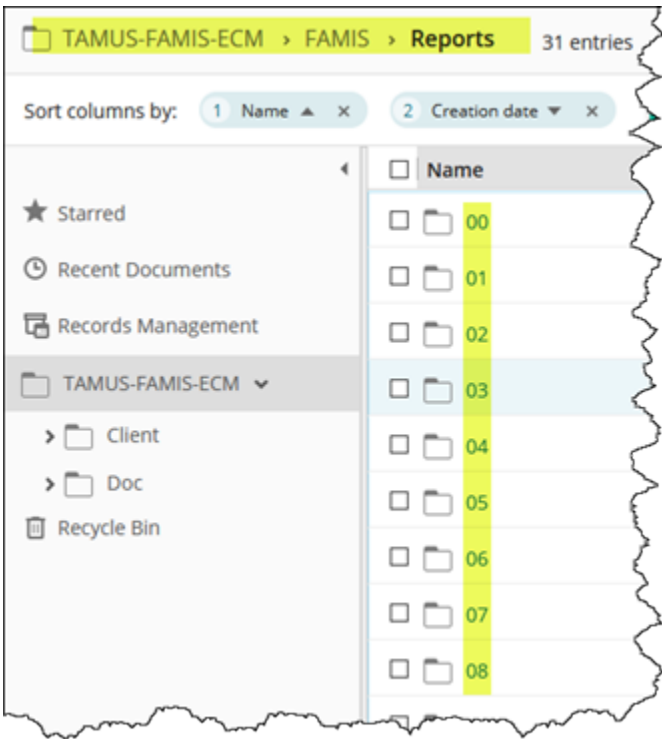
Member: 01, 02, 04, etc.

Report Type: Accounts Payable, Accounts Receivable, Bookkeeper, Daily, etc.

Report ID: Same report ID as was used in DDRINT

Run Year: Calendar year the report was created

Reports Folder Hierarchy



FAMIS Documents - Laserfiche (cont'd)

Repository: TAMUS-FAMIS-ECM

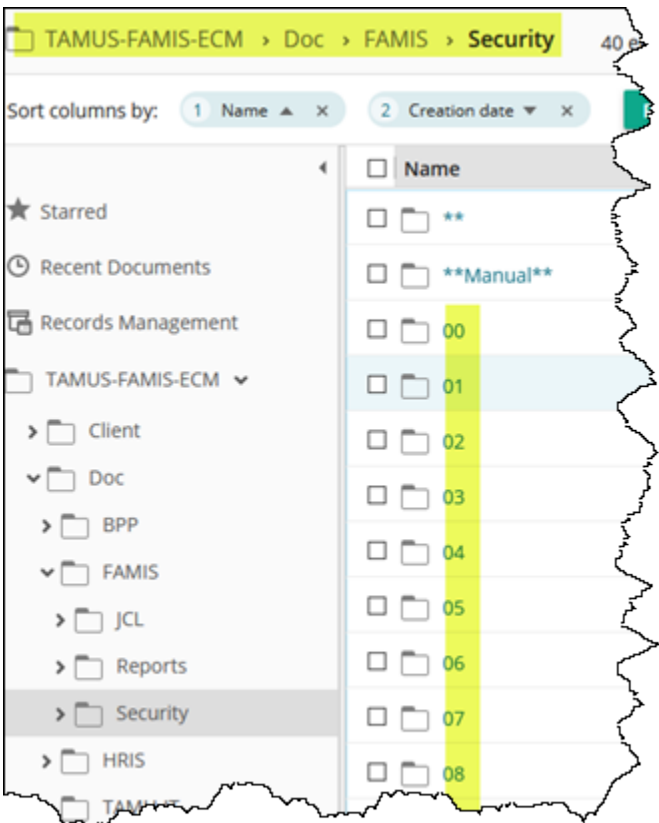
Master Folder:*Doc*

Document Type: *FAMIS*

Report Type: Security ←

Member: 01, 02, 04, etc.

Security Folder Hierarchy



FAMIS Documents - Laserfiche (cont'd)

Repository: TAMUS-FAMIS-ECM

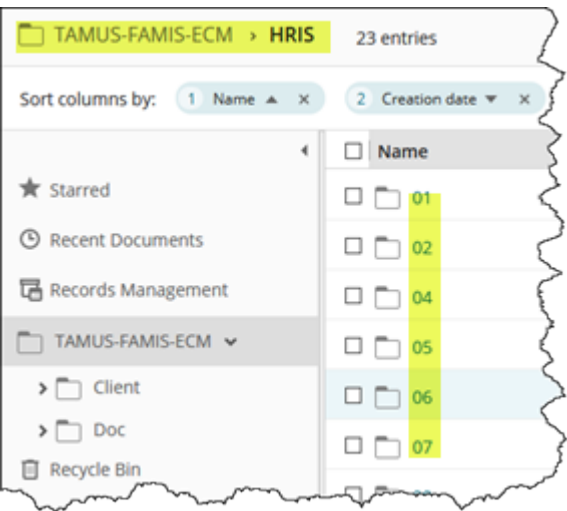
Master Folder: Doc

Document Type: HRIS ←

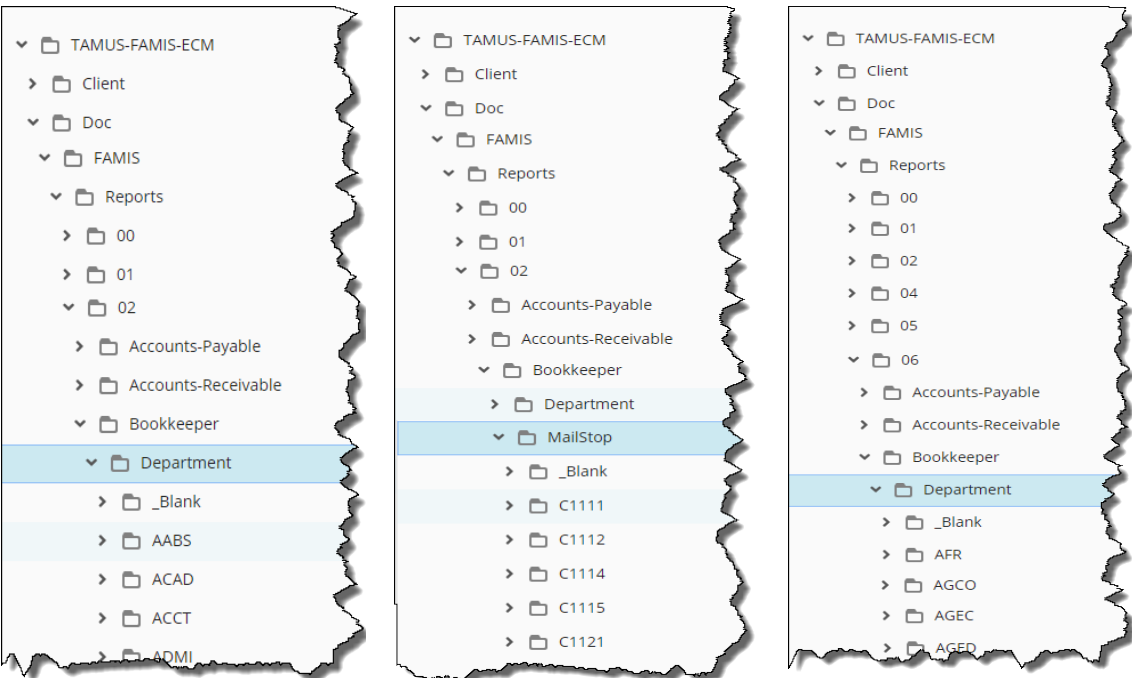
Member: 01, 02, 04, etc.

Report Type: FnnHRIS (nn=member number).

HRIS Folder Hierarchy



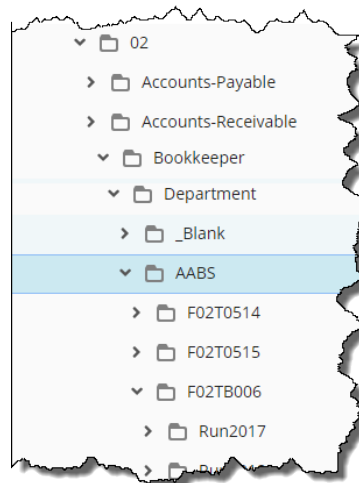
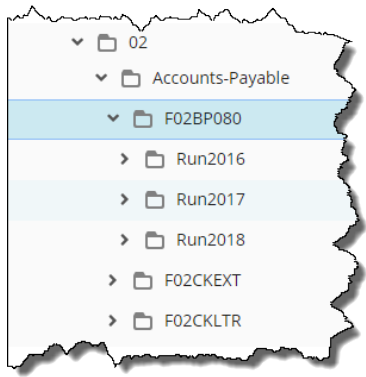
The 'Bookkeeper' folder will drill down further based on the Sort option selected by the Member:



FAMIS Documents - Laserfiche (cont'd)

Access can then be given to the specific department or mailstop.

Below each folder type (or department/mailstop for bookkeeper reports) will be individual Report ID folders. Below each of these folders, will be folders named 'RunYYYY'. Reports will be stored in these folders, based on the calendar year the report was run.



Laserfiche Naming Conventions

FAMIS reports in Laserfiche will use a unique name; each report will be appended with the date, time and a Laserfiche reference number as follows:

ReportID.Dyymmdd.Thhmmss.F000001.pdf

For example, report F02AU766 that was run on July 2, 2020 at 7:31 pm, would be named:

F02AU766.D200702.T193124.F000001.pdf

Note: Reports converted from Mobius/DDRINT will show a Last Modified Date as the day they were migrated; however the name will reflect the actual Date and Time they were originally stored in Mobius/DDRINT. Once we begin adding reports directly, the Last Modified Date should match the dated in the document name.

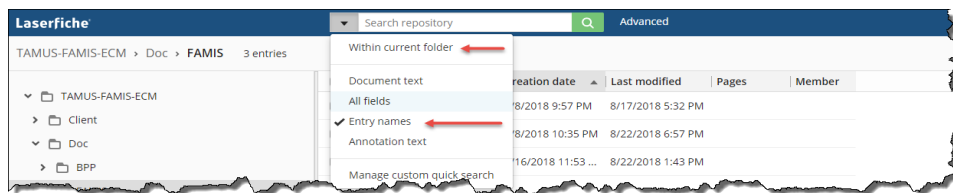
FAMIS Documents - Laserfiche (cont'd)

Searching 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.

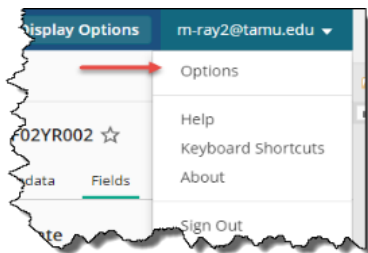
The user can search the entire Repository by the following:

- Click the arrow on the search pane
- Our suggestion is to leave only 'Entry Names' selected
- **-And- not** selecting 'Within current folder'

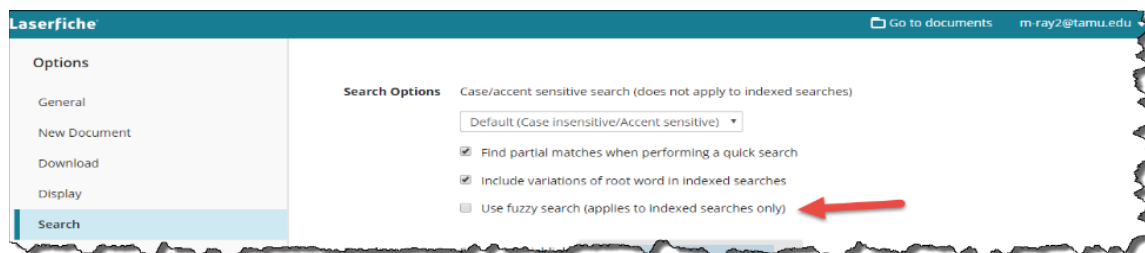


These changes will remain in effect until the user changes them again.

An additional change that may be needed is to disable the 'fuzzy search' option. This may have already been disabled by your administrator, but to check on it, the user can click on the arrow on their username in the upper right corner:



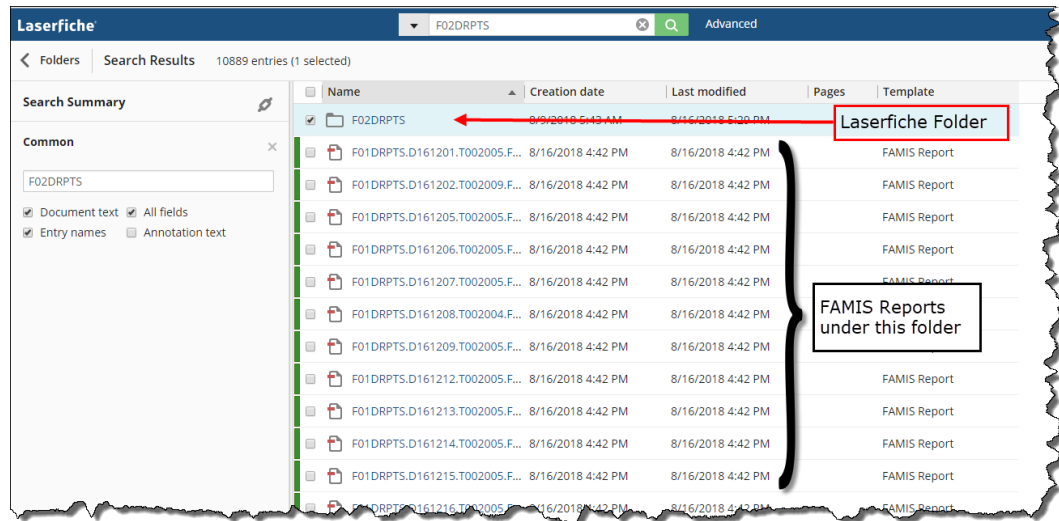
Under the search option, if marked, un-check the 'fuzzy search' option:



FAMIS Documents - Laserfiche (cont'd)

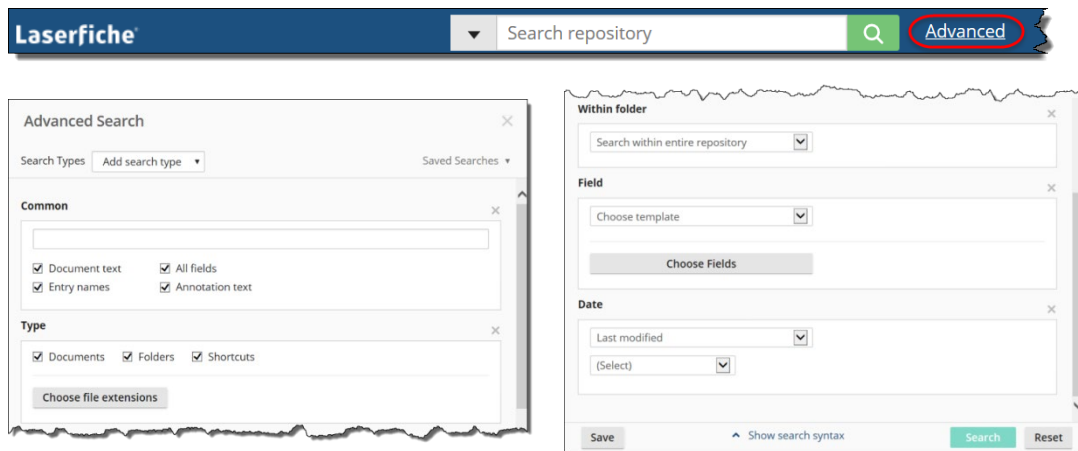
Report Search by Report ID

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



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.

FAMIS Documents - Laserfiche (cont'd)

Report Search by FAMIS Program

- Beginning in December 2019, the FAMIS Report number was added to the metadata stored in Laserfiche
- To search, click the 'Advanced' option to the right of the search pane to bring up additional search options:

The screenshot shows the Laserfiche search interface. At the top, there is a search bar with the text 'Search repository' and a green search button. To the right of the search bar is a red button labeled 'Advanced'. Below the search bar, there are two panels. The left panel is titled 'Advanced Search' and contains a search type dropdown, a search text input field with 'VBYR202' entered, and checkboxes for 'Document text', 'Entry names', 'All fields' (which is checked), and 'Annotation text'. There is also a 'Type' section with checkboxes for 'Documents', 'Folders', and 'Shortcuts'. The right panel is titled 'Within folder' and contains a dropdown for 'Search within entire repository', a 'Field' section with a 'Choose template' dropdown and a 'Choose Fields' button, and a 'Date' section with a 'Last modified' dropdown and a 'Platform' dropdown. At the bottom of the right panel are buttons for 'Save', 'Show search syntax', 'Search', and 'Reset'.

- Uncheck all search options, except 'All fields'
 - Enter the FAMIS Report Number
- Click the 'Search Button'
 - All matches for that FAMIS Report are displayed in the search results

FAMIS Documents - Laserfiche (cont'd)

Viewing Reports

When the search results are displayed, the user can select the report to display it.

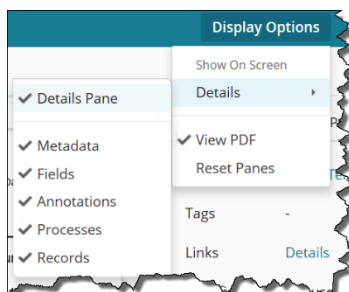
A PDF copy of the report along with template fields related to this report will be displayed.

The screenshot shows the FAMIS PDF Viewer interface. The main area displays a financial report titled "TEXAS A&M RESEARCH FOUNDATION Summary of Account Controls as of July 2018 By Fund Group". The report is a multi-column table with headers: CLEARING ACCOUNTS, RESEARCH & GENERAL, DESIGNATED, AUXILIARY, and RESTRICTED LEADER. The table contains various line items with numerical values. On the right side, there is a sidebar with tabs for Metadata, Fields, Processes, and Records. The Fields tab is active, showing a "Template" section with a dropdown menu set to "FAMIS Report". Below this, there are input fields for "FAMISReportID" (containing "F99DRPTS"), "RunTime" (containing "20180731-190402"), "JobName" (containing "F99DRPTS"), "Member" (containing "99"), and "Section Data" (containing "_Blank").

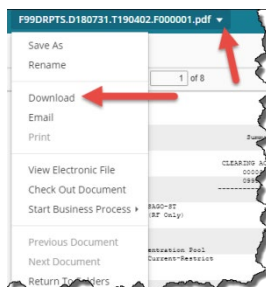
To change the display distribution between the fields and the document, the bar between the two can be pulled to the left or right.

The Details pane can be removed from the view completely by:

- Clicking on the Display Option
- Then clicking Details and unchecking 'Details Pane'



Clicking on the arrow to the right of the report name, will present an option to download the file:

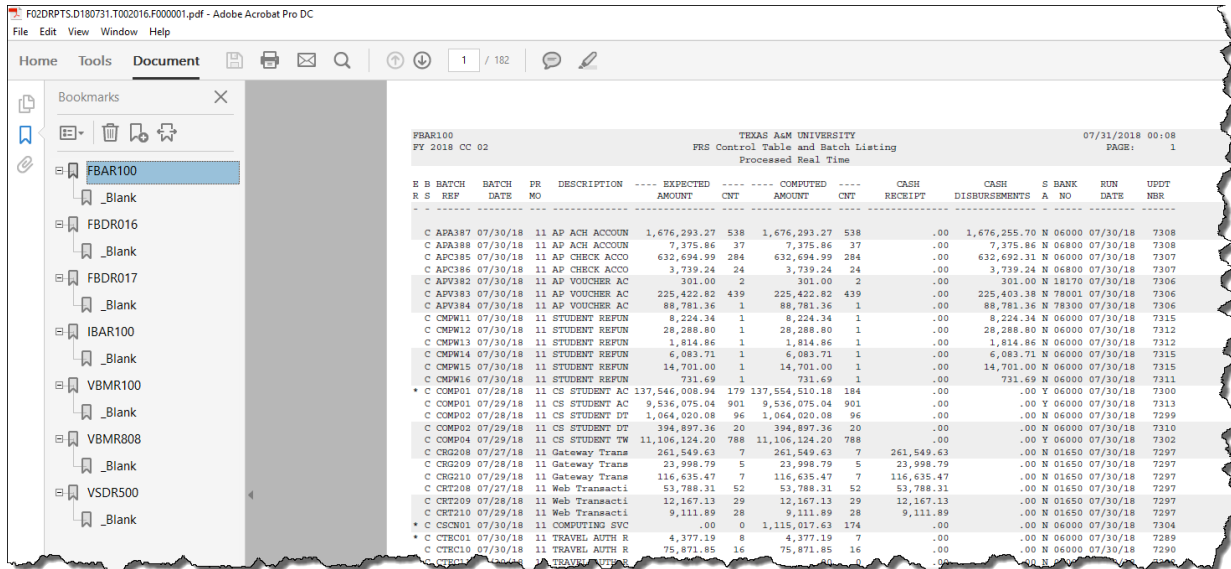


Note: Most users will not have the options to save, rename or move files within this repository.

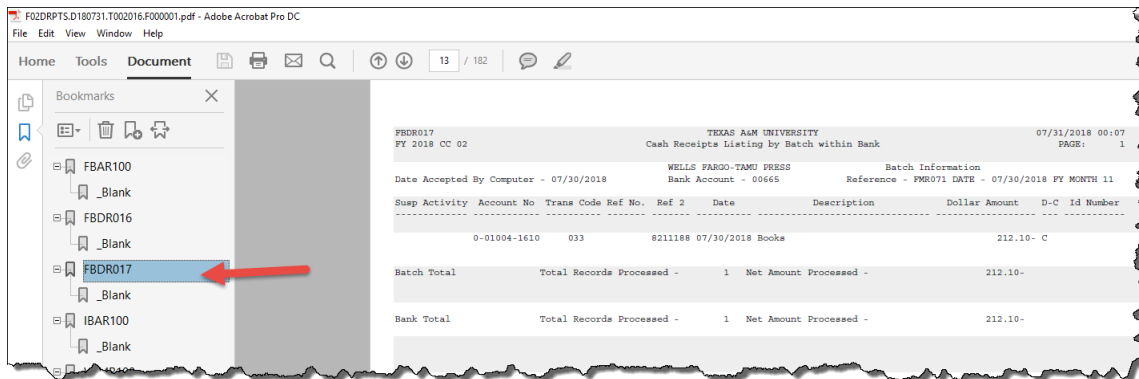
FAMIS Documents - Laserfiche (cont'd)

Bookmarks

Some files contain several different reports within the file. We have added bookmarks to these files to assist users in finding the correct report section. The Laserfiche PDF viewer does not show bookmarks, so the file will need to be downloaded and viewed in Adobe in order to see the bookmarks.



Clicking on one of the bookmarks will advance the user to that specific report:

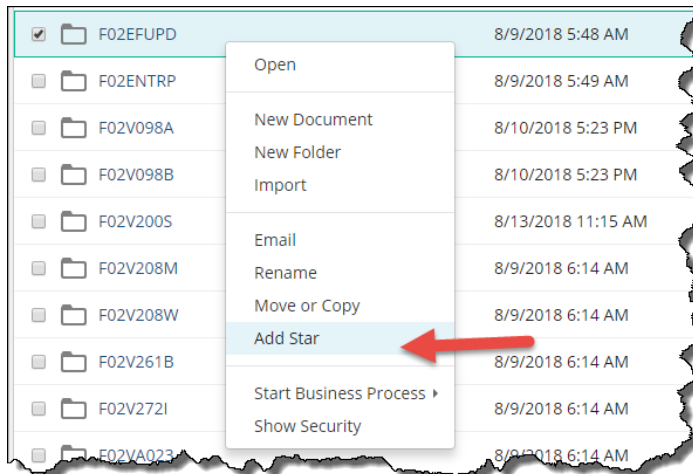


FAMIS Documents - Laserfiche (cont'd)

Favorites - Starred Folders and Documents

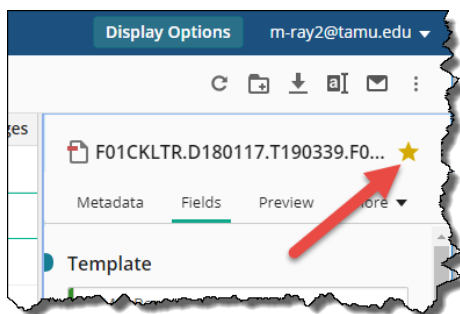
To create a list of often used folders and/or documents, there are two ways to mark these items for easy retrieval at a later date.

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



-OR-

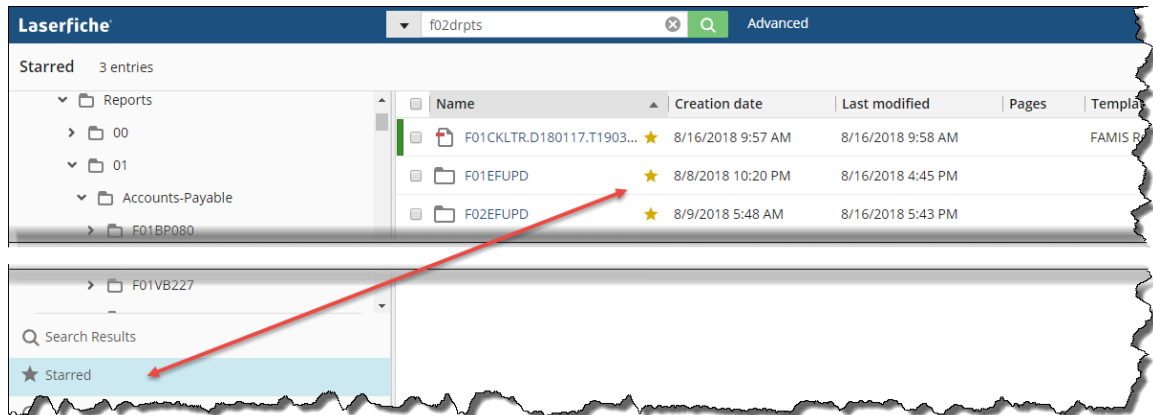
- Click on the empty star to the right of the file or folder name in the upper right area of the screen under the user name
- Clicking on the star will toggle between being marked or not marked



FAMIS Documents - Laserfiche (cont'd)

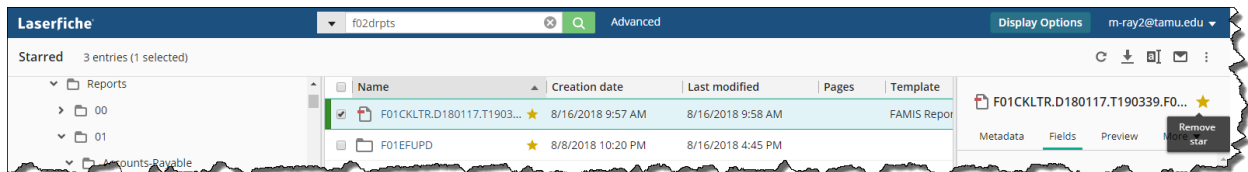
To display the folders/documents that have been marked with a star:

- Select the 'Starred' option on the left panel of the main display
- Any starred documents will be displayed

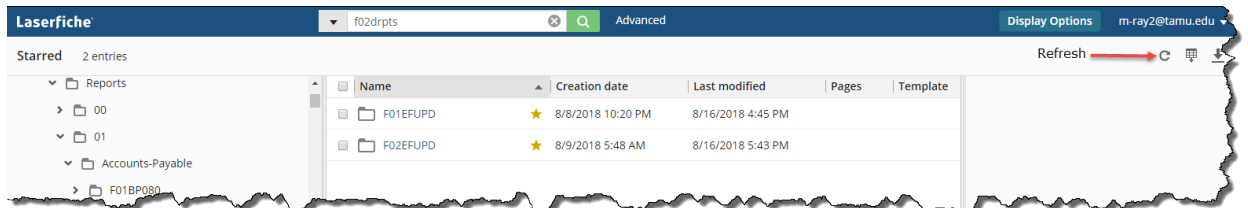


- Starred documents are specific to each user, so each user is able to maintain a listing of documents that will be needed on a repetitive basis

To remove a document from this list, click on the star to the right of the file name in the upper right of the screen under the user name:



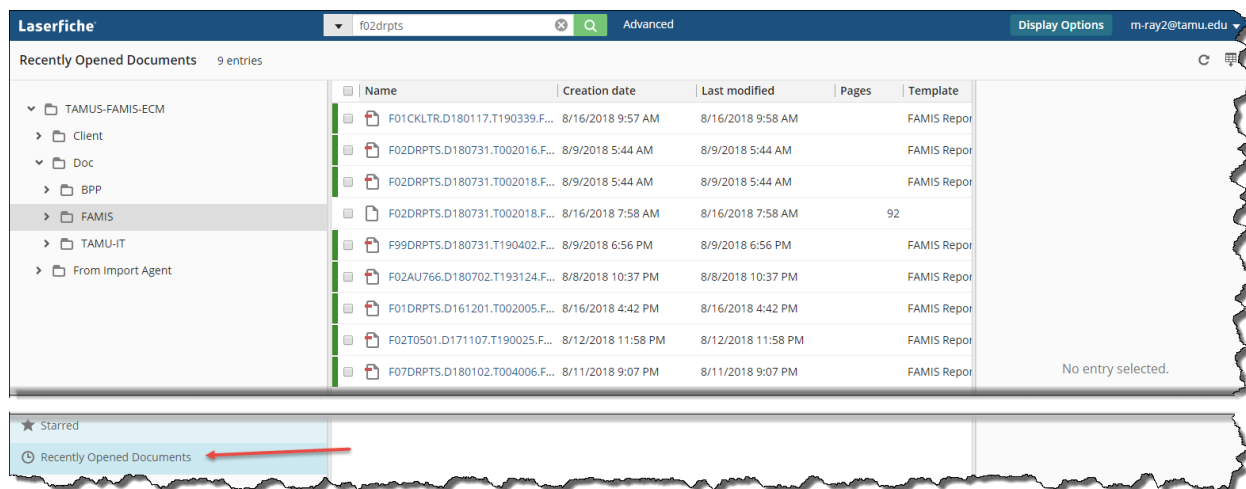
When the window is refreshed, that document is no longer displayed:



FAMIS Documents - Laserfiche (cont'd)

Recently Opened Documents

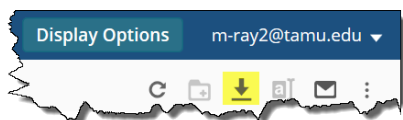
In addition to starred items, the eleven most recent files can be quickly accessed from the Folder Browser by choosing Recently Opened Documents.



Printing Documents

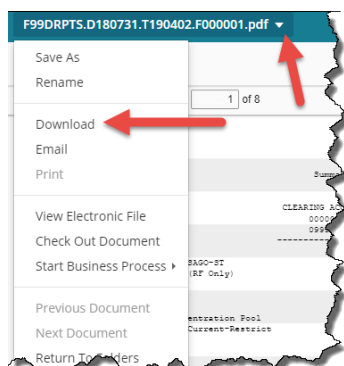
To print a document, it must first be downloaded from Laserfiche. To download a document:

- While in the repository folder, select the file(s) and then click the 'Download' icon in the upper right portion of the screen



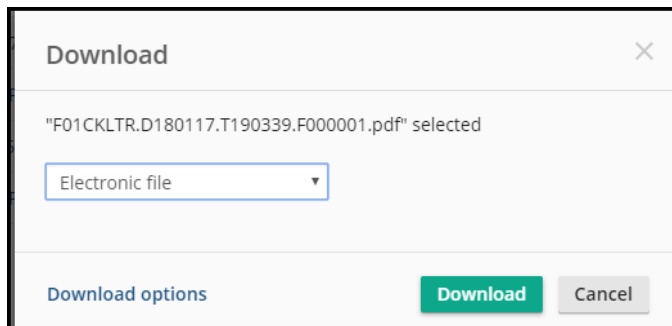
-OR-

- Once the user has selected a file and is in the 'PDF Viewer', right-click on the document and select 'Download'

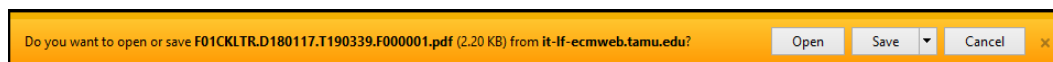


FAMIS Documents - Laserfiche (cont'd)

A download window may be displayed:

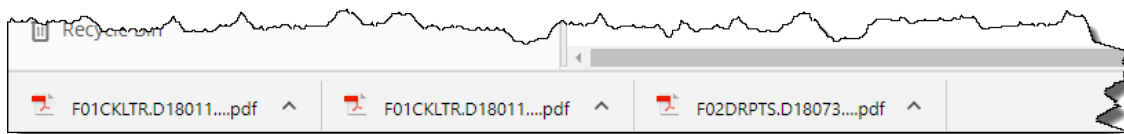


- Select 'Electronic File'
- Click 'Download'. Depending on the browser,
 - A prompt will be displayed giving the user the choice to open or save the document:



-OR-

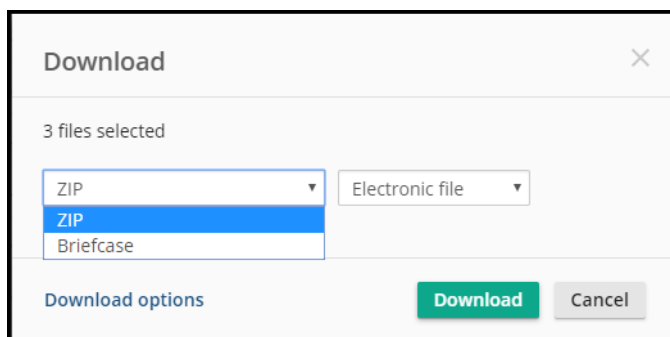
The downloaded file will be displayed on the browser window, ready for the user to take action.



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

When multiple files are selected from the repository folder, when the 'download' option is selected, the user will receive a prompt asking how they want the files downloaded:

- Zip
- Briefcase



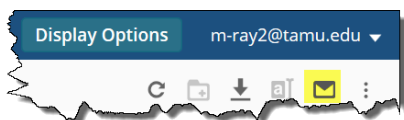
FAMIS Documents - Laserfiche (cont'd)

Emailing a Single Document from Laserfiche

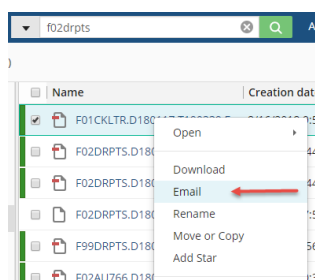
Documents may also be emailed from Laserfiche. To email a document:

- 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'

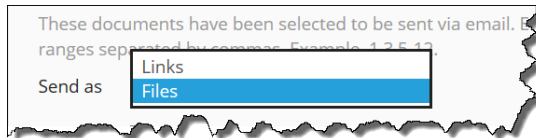


This will open a window to create an email:

A screenshot of the 'Email Basket' window in Laserfiche. The window has a title bar with a close button. Inside, there are two tabs: 'General' (selected) and 'Password'. The 'General' tab contains a table with columns: 'Name', 'Send as Pages', 'Pages', 'Page Range', and 'Clear All'. One document is listed: 'F01CKLTR.D180117.T190339.F...' with '0' in the 'Pages' column. Below the table, there is a text box with instructions: '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.' Below this, there are fields for 'Send as' (set to 'Files'), 'Email' (with a checkbox 'Use Microsoft Outlook to manually send the email message'), 'To' (empty), 'Subject' (empty), and 'Message' (pre-filled with 'm-ray2@tamu.edu sent you a document in Laserfiche. Sent by Laserfiche Web Access.'). At the bottom, there is a link 'Email options' and two buttons: 'Send' and 'Close'.

FAMIS Documents - Laserfiche (cont'd)

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

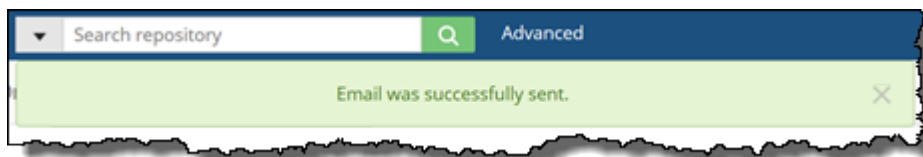


- Do not use the link option to send to recipients that do not have access to the FAMIS Laserfiche Repository. The link will require that the recipient login to access the file(s).

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

A screenshot of the 'Email Basket' window. The window has a title bar with a close button. Below the title bar are two tabs: 'General' (selected) and 'Password'. The 'General' tab contains a table with columns: 'Name', 'Send as Pages', 'Pages', 'Page Range', and 'Clear All'. There is one row in the table with a document icon, the name 'F01CKLTR.D180117.T190339.F...', and the value '0' in the 'Pages' column. Below the table, there is a text box with the instruction: '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.' Below this is a 'Send as' dropdown menu with 'Files' selected. There is a checkbox for 'Use Microsoft Outlook to manually send the email message'. Below that are 'To' and 'Subject' fields. The 'To' field contains 'betteruser@tamu.edu' and the 'Subject' field contains 'Requested FAMIS Report'. Below these is a 'Message' field. The message text is: 'Melissa Ray sent you a document in Laserfiche. Sent by Laserfiche Web Access.' A red box highlights the message text, and a red arrow points to it with the text: 'Replaced Laserfiche User Name (TAMU Net ID) with actual name'. At the bottom of the window are 'Email options' and 'Send' and 'Close' buttons.

When 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:

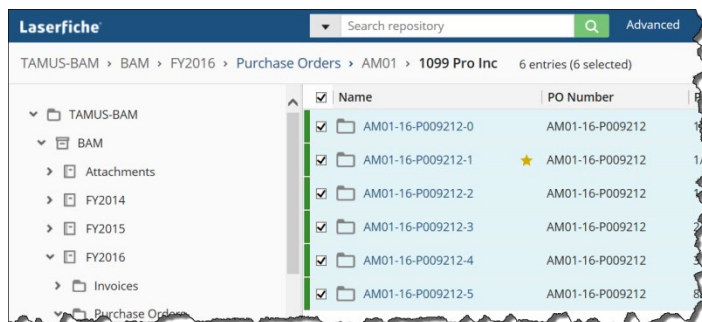


FAMIS Documents - Laserfiche (cont'd)

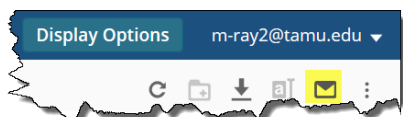
Emailing Multiple Documents from Laserfiche

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

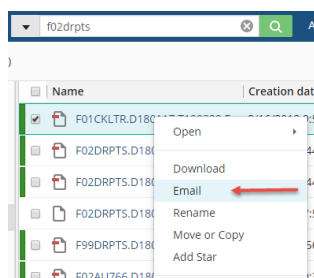
- Select the documents to be emailed



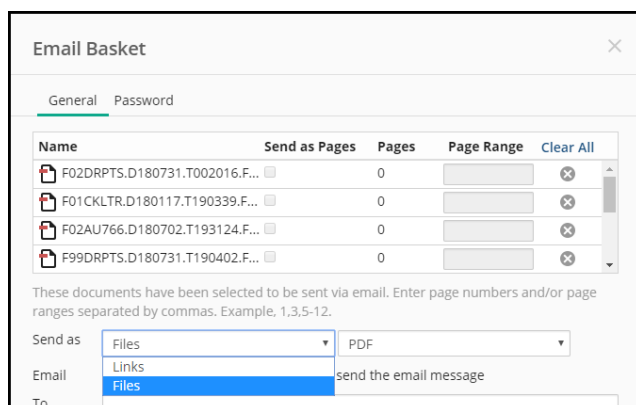
- Select the 'Email' icon in the upper right portion of the screen



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



- Emailing multiple documents through Laserfiche provides the option to send the files as links to the documents in Laserfiche or as actual files:



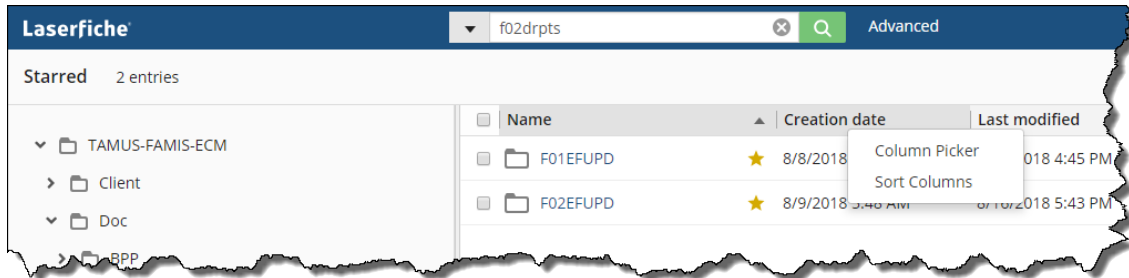
- When emailed as files, the recipient will receive a ZIP file containing all of the marked files

FAMIS Documents - Laserfiche (cont'd)

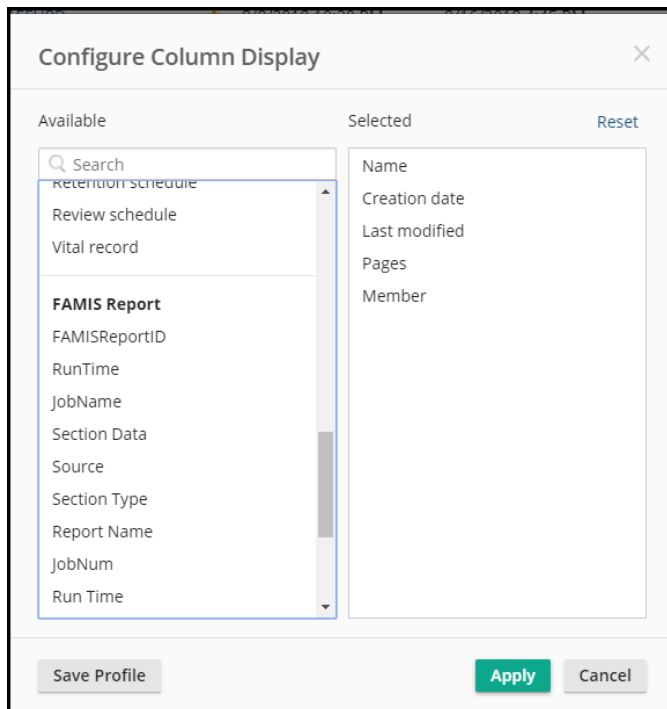
Customizing the Columns Displayed

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

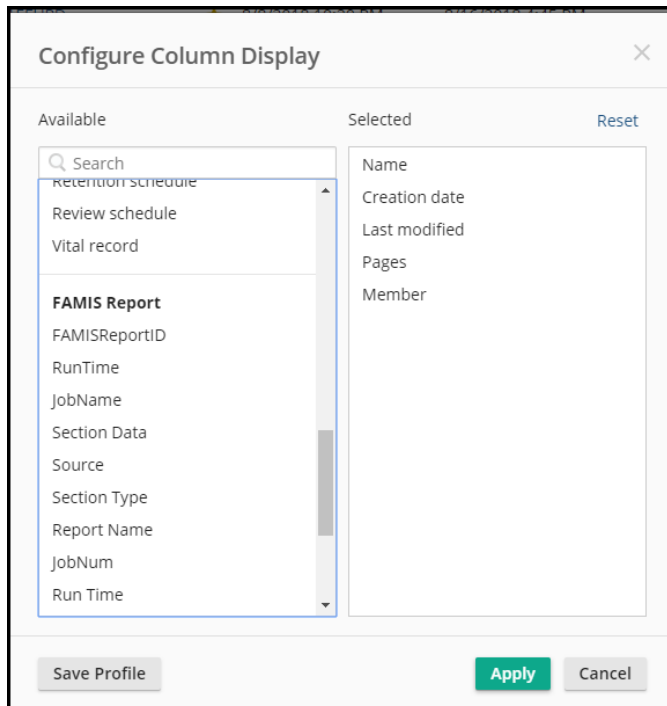
FAMIS Documents - Laserfiche (cont'd)

To change the order of the columns:

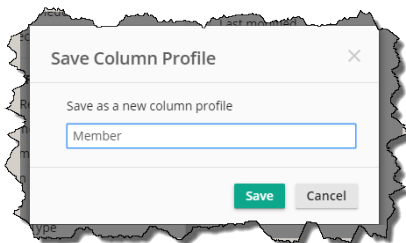
- Click an item within the 'Selected' list
- Drag item up or down to create the order desired

When all items have been moved:

- click 'Save Profile' to save this profile:

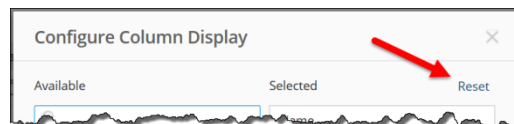


- Enter a name for the new profile in the window:



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

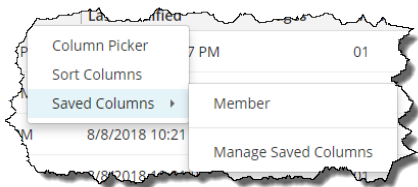
- Right-click on the column headings
- Select 'Column Picker' again
- When the 'Configure Column Display' window is shown
 - Click 'Reset' to go back to the original headings:



FAMIS Documents - Laserfiche (cont'd)

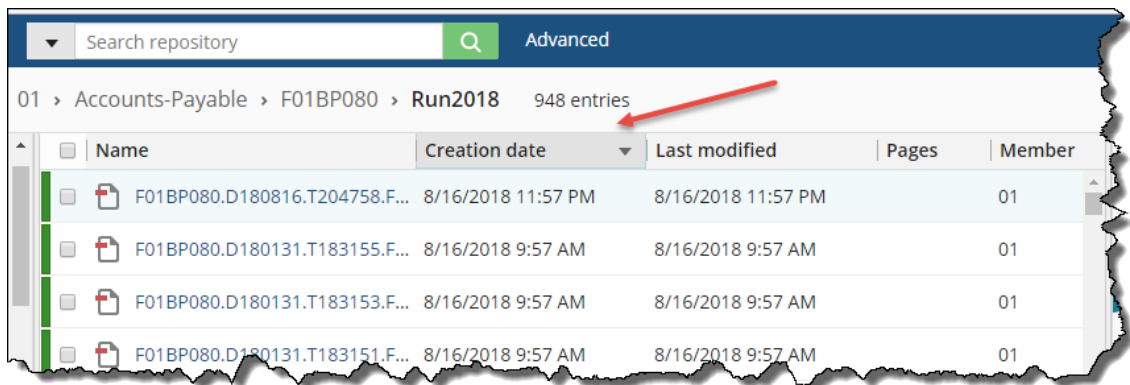
To use a saved configuration

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

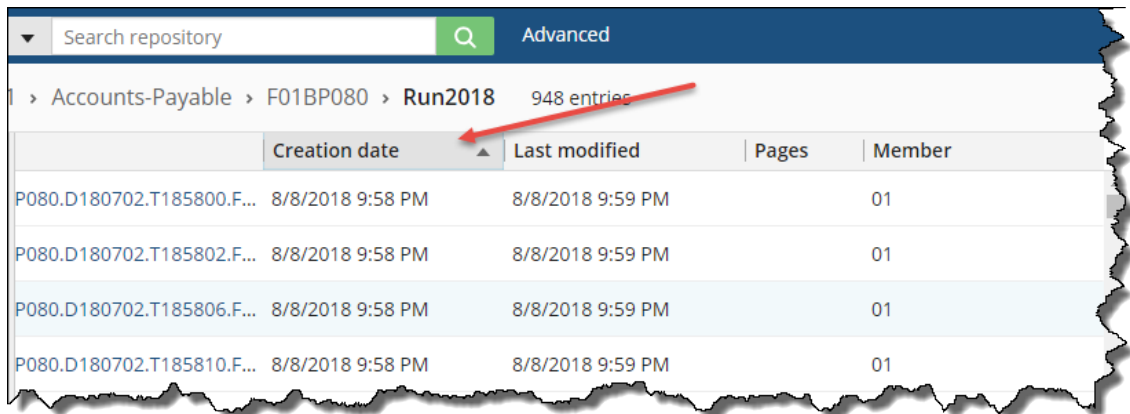


As the user drills down further into the folder, these headings remain. The columns will not be populated until the user has navigated down to the document level (where the templates have been used).

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



- Clicking the column again will change the sort order:



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