

Enterprise Wide Document Management

Jeremy Butler
Sales Manager

Michael Miller
Accounts Manager



DocuNav Background



Valuable Experience

Over **25 Years' Experience**
Implementing & Supporting
Laserfiche



K12 Premier Partner

A **Premier Partner** That Focuses
100% On Implementing &
Supporting EDM in K-12



Unmatched Expertise

"Top 3 Worldwide" Laserfiche
Provider – **#1** Provider for **K-12**
Education!

Experience & Knowledge



Complete Support

Expert Assistance & Troubleshooting –
Even When The Issue Is Beyond
Laserfiche



Platinum Certified

Knowledge & Experience To Ensure
Quality Support When Assistance Is
Needed



Engaged Community

Join A Community Focused On
Continuous Improvement & Open To
Sharing Experiences



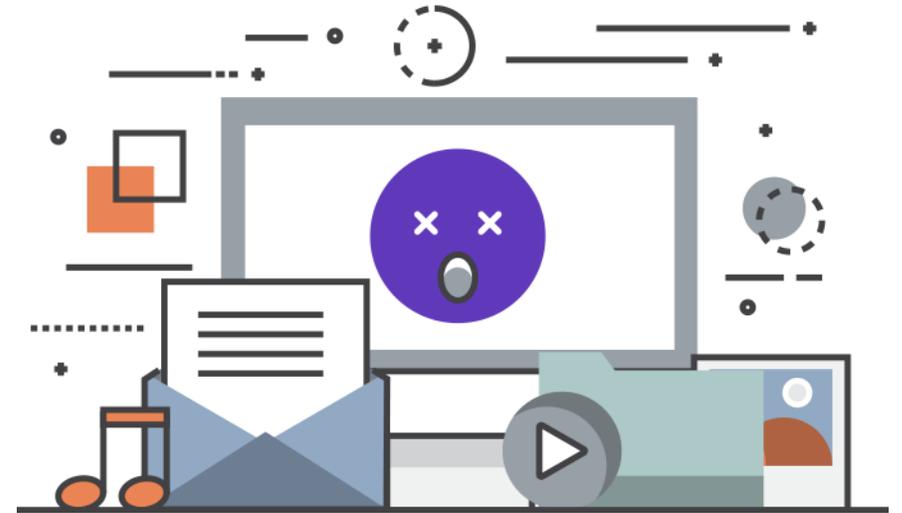
Digital Transformation

- *It's more than scanning*
- *Date forward process automation, multi-channel capture*
- *Current document disposition and condition*
- *Records Management, security & central data location*
- *Document level Indexing & splitting*
- *Document categorization and OCR options*



K-12 Centric Automation

- *K-12 Focus Software*
- *Automate folder structure & Security*
- *Metadata management*
- *Eliminate courtesy copies*
- *Foundational Repository design governing retention and security at the document level*
- *Preconfigured scalable no code solution*



Pre-Built Turnkey Packages

- *Pre-Built configurations with K-12 Focus*
- *Lower cost than building the solution from scratch*
- *Built to scale with enterprise growth*
- *Quick deployment*
- *Packages can be customized to your organization's needs*
- *Custom scripting and reporting to guide decision making*
- Annual improvements, new features and support

- HR Onboarding
- Employee Contracts
- Account Payable
- Vendor Portal
- Open Records Request
- SPED
- Cumulative Folders
- Student Enrolment

Streamline Processes

- *Enhanced security - prevent and provide access to folders or document level*
- *Improved Compliance, data oversight and data quality*
- *Document filing by AI workflow*
- *Task Management*
- *Digital Signatures*
- *Changes in IS are updated in repository*
- *Custom forms process to capture files from any source, internal or external*



Batch Processing

- *Automatically Sort, Identify, & Categorize Incoming Documents*
- *Capture Precise Pieces of Information From Paper & Electronic Documents*
- *Use Captured Data To Automatically Name, Index & File Documents*
- Train the software to recognize and identify documents by structure, logos, text, and more
- Utilize intelligent recognition to separate, classify, and sort batches of documents
- Extract information from sorted documents by teaching the software where to look for data
- Leverage extracted data to name, index, and file documents without any manual processing

Invoice Number: 0005
Vendor Name: Office DEPOT
Invoice Date: 5/13/2017
Invoice Amount: 379.90
Reference PO #: 1004

PAYMENT DUE 30 DAYS FROM DATE ABOVE

Andy Accountant
DocuNav Independent School District
8501 Wade Blvd - Ste 760
Frisco, TX 75034

Office Depot
1234 Office Drive
Plano, TX 75074

QUANTITY	DETAILS	UNIT PRICE	LINE TOTAL
2	Office Depot Bulk Printer Paper	14.95	29.90
5	100pk Bic Pens - Black	50.00	250.00
1	HP Ink/Toner - Multi-Color	100.00	100.00

Seamless Integrations

- *Seamless Integrations for any 3rd party app or database*
- *Changes made in 3rd party applications instantly update index values in Repository*
- *Automatically initiate workflows and kick-off business processes from within any line-of-business application*
- *Generate “load files” with Laserfiche data for bulk data imports and updates to 3rd party applications*

-  SAP
-  Salesforce
-  DocuSign
-  MS Office
-  MS Teams
-  Unattended RPA
(Workflow Bots)
-  Laserfiche APIs
-  CMIS Gateway

Enterprise Security

- *Seamless Integration with Schools SSO/MFA/RBAC*
- *Securing access from cloud to on-premises business applications and content with a **hybrid architecture***
- *Granular folder / document level security*
- *Audit trail reporting*
- *Repository encryption*
- *Legal holds*



Records Management

- *Retention applied at the Document level*
- *Application regardless of how documents were collected*
- *Improved efficiency in the storage, retention and disposition of records and records series*
- *Support for custom searches based on record properties, retention or disposition properties*
- *Audit trails to track all system activity and the entire life cycle of records.*
- *Linking to track Versioning, supporting documents and legal holds.*
- *Support for custom searches based on record properties, retention or disposition properties.*

The screenshot displays a records management interface for a record titled "Black, Michael". The interface includes tabs for "Metadata", "Preview", "Fields", and "Records". The "Records" tab is active, showing a "Life Cycle" section with a vertical timeline of key events: "8/13/2010 Filing date", "4/3/2012 Employment Ended", "8/18/2013 Cutoff Eligible for cutoff 4/3/2013", and "4/3/2023 Eligible for destruction". Below the timeline is a "Details" section with fields for Location, Status, Path, and Permanent. The "Cutoff Instruction" section shows Name, Type, and Interval. The "Retention Schedule" section shows Name, Type, and Retain for duration.

Life Cycle	Event	Date
Filing date	8/13/2010	
Employment Ended	4/3/2012	
Cutoff Eligible for cutoff 4/3/2013	8/18/2013	
Eligible for destruction	4/3/2023	

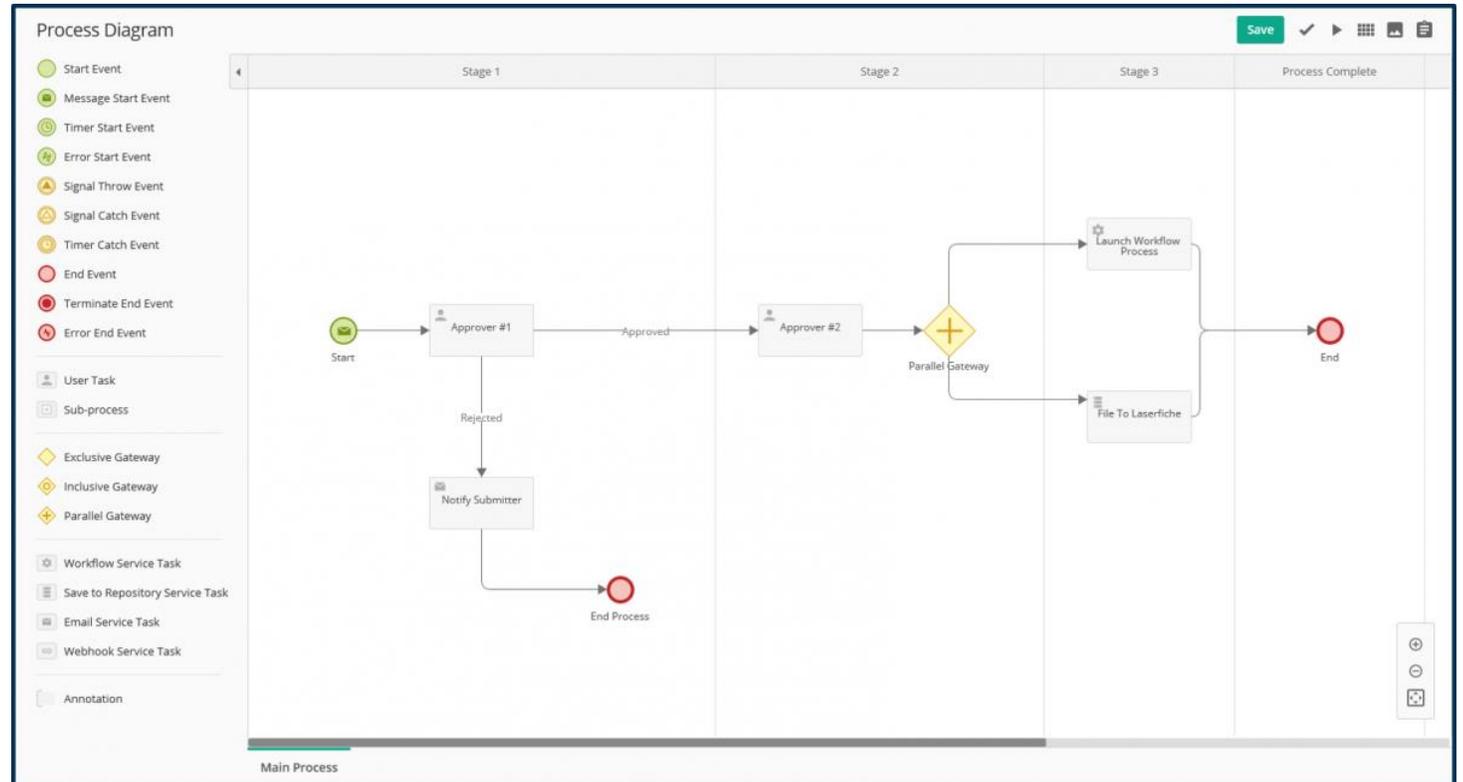
Details	Value
Location	Current file area
Status	Cutoff
Path	Repository 1\0P4 Human Resources Records\01-01 Employment Applications\Black, Michael
Permanent	No

Cutoff Instruction	Value
Name	Employee Records
Type	Interval-Event
Interval	12 months

Retention Schedule	Value
Name	Employee Records
Type	Destroy
Retain for	10 year(s), 0 month(s)

Dynamic Web Forms

- *Utilize the intuitive Forms Process Modeler to create structured processes with intelligent decision making*
- *Streamline approval processes with automated routing decisions & email notifications*
- *Track Form processes every step of the way, from beginning to end, and receive automated status updates & reports*
- *Replace paper forms with easy-to-design web forms that can be published on intranets and public websites, distributed through email, and more.*



Dynamic Web Forms

- *Create and publish e-forms with an intuitive forms management system that requires no coding or scripting.*
- *Easily create attractive forms with preconfigured templates or customize them with editable fonts, colors, uploaded images and layout options.*
- *Drag and drop a wide variety of fields, checkboxes and radio buttons onto your form to collect the exact information you need, in the precise format you require.*
- *Change the look and feel of a form – or add and delete questions from it – at any time, without requiring programming assistance.*

The screenshot displays a web form builder interface with a top navigation bar containing tabs for 'Layout', 'Field Rules', 'Lookup Rules', 'Error Messaging', 'Themes', and 'CSS and JavaScript'. The 'Layout' tab is active, showing a 'Fields' panel on the left with a list of field types: Single Line, Multi-line, Radio Button, Checkbox, Drop-down, File Upload, Address, Number, Email, Date, Time, Currency, Signature, Geolocation, Custom HTML, Section, Page Break, Collection, and Table. The 'Variables' panel is also visible. The main workspace shows a preview of a form titled 'Form Title' with various fields: Date Calendar, Single Line, Multi-Line (with a note '*Provide instructions below fields'), Drop-Down List, Checkbox (with six choices), Radio Button (with four options), Section Header, Attachments (with an Upload button), and Addresses (with fields for Street Address, Address Line 2, City, State / Province / Region, Postal / Zip Code, and Country). A mouse cursor is hovering over a 'Single Line' field in the 'Fields' panel.

DocuNav Shield

Enterprise Backup and Disaster Recovery Option for Laserfiche

- *Protection against Disasters (natural or synthetic), Accidental deletions, Hacking/viruses and Ransomware attacks*
- *Recovery in a few hours – no downtime*
- *Managed by a trusted 3rd party*
- *Complimentary hosting during disaster recovery*
- *24-hour support access*
- *Offline 2nd copy / archive*
- *System is HIPAA, FERPA & CJIS compliant (90+ others also possible)*

