

Long Beach Community College Automating Accounts Payable and Admissions with Laserfiche



Long Beach City College (LBCC) is a two-year community college that encompasses state of the art, technology-rich learning environments, a broad range of academic and career technical instructional programs, strong community partnerships, and economic and workforce development initiatives that prepare students to be successful in the 21st century. The College enrolls more than 60,000 students per year.

LBCC has been an ECS and Laserfiche customer since 2002. Over the years the College has expanded usage of the system to many other departments including Accounts Payable, Admissions and Records, Student Affairs, CalWORKS, Extended Opportunity Program & Services, Student Health Services, Counseling, Workforce Development, Human Resources, Payroll, Fiscal Services, Purchasing, Contracts, Facilities, Bond Management, and Reprographics and Mail.

The enterprise Rio system has grown from 10 users to 91 Users, with Forms portal for unlimited users to submit forms, 50 Forms Authenticated Participant Users, 2,000 authenticated users in the Forms processes with read only access to Laserfiche and Weblink portal with unlimited users to search and view documents. There is approximately 3.5 Terabytes of data currently stored in multiple repositories.

Starting in 2017, ECS worked with the College to automate their Accounts Payable invoice process using Laserfiche Forms and Workflow. The process includes integration with PeopleSoft to perform a database lookup from Laserfiche using the PO number or Requisition number.

The streamlined AP approval steps are as follows:

- 1) When AP receives an invoice it is scanned or imported into Laserfiche depending on how it was received (mail or email).
- 2) The metadata is then entered into a document template including invoice number, date, vendor name, amount, purchase order number, and requisition number. Any additional metadata can be filled in later if needed.
- 3) Workflow also checks for duplicate invoices using the invoice number and vendor ID.
- 4) To provide flexibility, the AP users select an approver from a list.
- 5) The invoice is then emailed to the approver with a link to the document and they select which fund will be used. If no action is taken within 3 business days, the approver and requestor receive an email reminder. A/P staff can reassign or cancel the request at any time.
- 6) The next step of the Workflow moves the invoice into the initiator's folder. If the PO field is filled in the invoice is routed to a 'Ready to Pay' subfolder, if it is not it's routed to the 'Ready to Pay, Waiting for PO' subfolder.
- 7) At this point the invoice can be paid directly from within PeopleSoft. The People Soft Voucher number is then added to the Invoice metadata in Laserfiche.
- 8) If the invoice is not flagged for an audit, it will move to the 'Wait for Remittance' folder.

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- 9) The Initiator scans the remittance into Laserfiche and adds the check number and check date.
- 10) Workflow will then calculate the destruction date based on the check date. The documents are then filed away based on fiscal year and Vendor.

Invoice Approval Form	
Initiator	0345671
Approver's Name	Jane Baker
Requestor's Name	Lauren McAnelly
Requestor's Email	
Weblink URL	https://LF- Imaging.lbccd.lbcc.ca.us/weblink/DocView. aspx?dbid=3&id=1810461
Invoice #	TEST #31
Invoice Date	8/22/2018
Amount	150.00
PO #	0000076972
Requisition #	
Vendor ID	0000010078
Account String	641000 12 499911 7143
Fund	12

Prior to automating the AP process, the average time to process a requisition to create a Purchase Order was averaging about 49 days. 84% of that time was from initial budget check. LBCC processes over 2,000 POs a year with peak creation months being July and March. With the success of the AP workflow in the initial phase, LBCC has started the process of using the automated method in all department's campus wide.

To serve the more than 20,000 students per semester, ECS is assisting the Admissions Department with the development and implementation of an automated Transcript Evaluation Process. This process is divided into two phases. Phase one starts when student transcripts are received in either paper form or as a PDF file. Once scanned or imported into the Laserfiche repository, student information is entered into metadata fields in the document template. In Phase two, Workflow will route the transcripts to the appropriate Enrollment Specialist who will then evaluate the transcripts. If confirmed, the transcripts are routed to another folder as completed.

ECS is also assisting the College with the development of the following electronic Student forms and automated processes:

- ◆ Residency Appeal
- ◆ Prerequisite Challenge Form
- ◆ Request for Grade Change
- ◆ Course Substitute Form

The process for these electronic form's submission is: the student completes and submits the form, they can also upload attachments to the form if necessary. Once submitted, a notification of receipt is emailed to the student. Depending on the form, a notification is also sent to either the Academic Department or the Admissions and Records staff to process. When processed, the form and all attachments are automatically indexed and saved to the Laserfiche repository.

LBCC has future plans to build Quick Field sessions to automatically extract data from paper documents as they are scanned into the system. Configure the Records Retention throughout the repository, and develop small Workflows to clean up the repositories. Import Agent will assist with automatically moving documents from the network into Laserfiche and LF Connector will provide an out of box integration with PeopleSoft and other systems.

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