

Title of Webinar: Contract Management in the Fast Lane

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Answer Sheet:

Q: Can the pre-built forms be easily modified for your specific needs/design?

A: Yes. These templates are meant to serve as a starting point for your organization. While there are specific default settings in place, you can easily change them to suit your needs. You can add people to processes, change who receives/approves documents, add stages in the processes, and modify the fields on the form, just to give a few examples.

Q: Is the dashboard feature in Laserfiche Forms new with version 10?

A: Yes, the dashboard feature was introduced in version 10.

Q: Can we submit supporting documents after the initial creation and can we just drag and drop?

A: Yes, after the initial creation of the contract, you can drag and drop supporting documents into the specific contract's folder in the Laserfiche repository. You can also configure your forms to include a repository view, enabling you to drag and drop files directly into the Forms interface.

Q: Can there be a "standing" checklist of to-dos for certain kinds of forms?

A: Yes, you can have a checklist in the initial form. When particular options are selected, that information is brought into every subsequent form. That way other people who need to contribute information and add to the process will have that checklist on their form.

Q: How did you add the "open the contract folder in Laserfiche" into the view panel?

A: You can add a simple HTML field onto the process. Laserfiche Workflow dynamically creates the URL to link to the specific location in the repository. That's an out-of-the box feature that can easily be configured.

Q: Is it possible to have a preview of the document within the view pane? (Approval process) instead of opening Laserfiche?

A: Yes, you can use scripting to configure Forms to include a pane with a view of the repository.

Q: Was the search for "all contracts" done using Forms?

A: The search was done through the Forms interface, but it's actually Laserfiche Workflow that searches the repository for contracts and returns the results back through Forms.

Q: Can we upload our own contract template?

A: Yes, you can upload your own templates to a form.

Q: We are incorporating DocuSign in our document management process at this time. Does this product lend itself to integration with DocuSign?

A: Yes, there is an integration that adds a button to the repository for transferring files to DocuSign. This allows you to take advantage of the templates in DocuSign. Also, once the document is signed, the file is transferred back to the repository including all the securities applied by DocuSign.

Q: Could we see a sample of the signature usage? Are you using an outside vendor for this? Is there a signatory component in Laserfiche?

A: To handle signatures, Laserfiche has integrations for both DocuSign and SIGNiX.

Q: Please clarify which parts of the workflow were handed off from LF Forms over to LF Workflow. Need to understand the limits of LF Forms vs LF Workflow.

A: Laserfiche Forms handles the user interface for submitting information. Adding metadata, signing templates, and populating variables can be done in Forms. Also, Forms has its own process modeler that handles how forms are routed. Any repository actions require Laserfiche Workflow. Versioning on the document or saving the contract and the contract template together are handled through Workflow.

Q: Is there Microsoft Office integration that can build a Word document from the content of a Form (Field values)? For example, could you have passed the Contract Effective and Expiration Date fields into the Attached Word document to build the Contract based on what was entered in the Form?

A: Yes, you can configure Laserfiche Workflow to pull information from forms to be put into a Word document.

Q: Is there a way to give a user a read-only function to the process diagram? as a way of a BPI team to review the diagram without being able to make changes.

A: Yes, to provide read-only access you can download an image of the process to send to other teams.

Q: Does this track the budget amounts for the contracts? We have 250+ contracts. Am I able to pull out information on the budget amounts and different funding sources that are mentioned in the contracts for a particular time period?

A: Yes, if the information is in Laserfiche, you can create a customized search to pull that information from documents.

Q: How do we save approved contracts from email back to the repository?

A: Laserfiche software has built-in integrations with Microsoft Office products like Outlook. There is a button in Outlook for saving attachments directly to the repository.

Q: What is the difference between a process diagram and a workflow, and how does either affect the flow of the form/document?

A: Forms has process diagrams for building out approval processes. Workflow is the repository automation tool that works with the content saved to Laserfiche, including things like creating documents, naming them, and moving them.

Q: Can I upload a contract template that is already in Laserfiche?

A: Yes, you can upload templates that are already in Laserfiche. You can export the templates from Laserfiche and upload them into the form. Alternatively, you can configure Forms to provide a view to the repository in each form so you can drag the documents out of Laserfiche and into the form.

Q: Can you create a report of outstanding contracts where insurance is outstanding (to be collected)?

A: Yes, if the information about insurance is built into the process, you can use the reporting option in the operational dashboard to find contracts with outstanding insurance. Alternatively, if that information is managed as metadata, you can run a customized search and download the results as an Excel file.