

Disbursements Auto Naming Tips for Scanning in Laserfiche

To set the Invoice Template as the Default Template:

1. In Laserfiche (LF), go to Tools>Options>New Documents
2. Have the user set the Invoice template to be default document template
3. Click OK.

To set the Auto Name Feature:

1. In Laserfiche (LF), go to Tools>Options>Autoname
2. Have the user put in:
%(Fields.Invoice - Agency)%([Fields.FAMIS Document Number (L, E, P)])
in the field for Default Document Name.
*****This must be entered exactly as it is written (no extra spaces, exact parenthesis, etc.).**
3. Click OK.

The Auto Name feature will take the value entered into the invoice template field **%(Fields.Invoice - Agency)** and put it first in the document name and then immediately follow with the value from the invoice template field **%(Fields.FAMIS Document Number (L, E, P))** after it. This will combine the Agency with the Purchase Order number. Ex: 06L123456 or 07L123456. This will allow the user to enter the information only one time instead of two and reduce the possibility for keying errors.

If you have several documents to scan into LF, before scanning the first document, you can also enter the Agency and the Unit in the Invoice template and it will be saved for the other documents that you scan in. This will be two less fields that you have to enter each time.

The auto name feature works if you follow the following steps when scanning:

1. In LF, open the scan feature
2. Select the Invoice Template if not set as your default.
3. Select the Agency
4. Enter the Unit name
5. Scan the first document
6. After scanning, complete the required fields on the template
7. After completing the template information, click on New Document
*****This will store your current document in the folder you are working in with the name automatically assigned.** Now you can scan the next document and follow the steps above.

As a reminder, please be sure to key all information correctly. The document name and the information contained in the invoice template fields is used by LF for some automated processes. These processes include attaching data forms after a document has been processed and filing the completed documents in the 4.2.3.1 Purchase Vouchers section. If documents are not named correctly, they will not be filed correctly. If documents are not filed correctly, the both Disbursements and Departments/Units will have more difficulty locating information.

For questions, contact the Texas A&M AAgriLife Disbursements Office.