

## AgriLife Laserfiche Account Procedures

The following procedures outline the Account Management Procedures for the AgriLife, Borlaug Archives, and TFS Archives Laserfiche Repository Access. These procedures supplement AgriLife Research/Extension Procedures 29.01.99.A/X0.05, *Information Technology Account Management Procedures*; and College of Agriculture Guideline, *Information Technology Account Management Procedures*.

Laserfiche Access:

### **New Account Procedures – AgriLife Employees and College of Veterinary Medicine Employees:**

For access by AgriLife employees, County employees supporting AgriLife extension offices, Wildlife Services USDA personnel, or College of Veterinary Medicine Employees, the following procedures apply for Laserfiche Account Access:

1. The individual requesting access must complete Page 1 of an AG-704, *Document Management System-User Access* form. To complete the form, the individual will complete the information on the first page (omitting the UIN if they do not have one) and sign the form acknowledging the *Statement of Responsibility*. For College Departments, be sure the NetID is included on the form.
2. A Unit Account Manager (UAM) for AgriLife People will then go in and request Laserfiche access in the AgriLife People System including the request for Unit (1), (2) or (3) as deemed appropriate for their intended use. The UAM will also indicate if the individual is to be a General User of a Unit Admin. (Note: If Laserfiche Unit Admin is selected, the individual will be required to attend a special Unit Admin Training session and will then be granted access to all the unit's documents.)
3. The Unit Admin or a Laserfiche User in the unit will then scan and place the Page 1 of the AG-704 in the Work in Progress – Document management folder in Laserfiche.
4. The Laserfiche Team will be notified of the access request in AgriLife People via a First-Call ticket. A team member will then review the form and the request, set up the account in Laserfiche and grant the access indicated. The Laserfiche Team member will also assign a license via the LF Admin tool. If there are questions, they may contact the Unit Admin for clarification. The team member completing the action will then place the form in the appropriate Laserfiche folder for the Workflow to route the document to the appropriate folder.

5. The Laserfiche Team will then send an e-mail to the individual with login instructions and copy the Unit Admin.
6. Additional access to unit owned folders may be granted to the individual at the levels desired by the Unit Admin.

#### **New Account Procedures – SRS:**

1. The individual requesting access must complete an AG-704, *Document Management System-User Access* form. To complete the form, the individual will complete the information on the first page (omitting the UIN if they do not have one) and sign the form acknowledging the *Statement of Responsibility*. The individual will also complete the top portion of page two of the form. Note: the FAMIS ID is the user's unit/office of assignment.
2. The unit's Laserfiche Unit Administrator (Unit Admin), will then complete page 2, indicating to which groups the individual will be given access (i.e. Unit (1), Unit (2), Unit (3)) as deemed appropriate for level of access. The Unit admin will also indicate if the individual is to be a General User or a Unit Admin. (Note: If Unit Admin is selected, the individual will be required to attend a special Unit Admin Training session and will then be granted access to all the unit's documents.) Unless there is special request for Feature Rights or Privileges, these blocks will be left blank. Additional notes about requested access may be added in the "Other Changes" block of the form. The Unit Admin will then complete their name in the block indicated and sign the form approving the access.
3. The Unit Admin will then obtain the Unit Head's signature on the form in the block provided
4. Upon completion of the form, the Unit Admin will submit the form to the Laserfiche Team via a First-Call ticket.
5. A Laserfiche Team member will then review the form, set up the account in Laserfiche, and grant the access indicated. The Laserfiche Team member will also assign a license via the LF Admin tool. If there are questions, they may contact the Unit Admin for clarification. The team member completing the action will then place the form in the appropriate Laserfiche folder for the Workflow to route the document to the appropriate folder.
6. The Laserfiche Team will then send an e-mail to the individual with login instructions and copy the Unit Admin.
7. Additional access to unit owned folders may be granted to the individual at the levels desired by the Unit Admin

## Account Change Procedures

For changes to access, i.e. adding additional access groups, the following procedures apply:

1. **For AgriLife and College of Veterinary Medicine employees**, (including County support personnel): A request will be submitted as a change to access via the AgriLife People System, or the Laserfiche Unit Admin may also e-mail the Laserfiche Team and request the additional access be granted. **For SRS:** The Laserfiche Unit Admin will complete page 2 of the access form, sign the form and send it through First-Call. The Unit Admin may also e-mail the Laserfiche Team and request the additional access be granted.
2. Upon receipt of the ticket from First-Call sent via AgriLife People, or receipt of the form or an e-mail, the Laserfiche team will add the access requested, and attach the form/e-mail to the user's access form in Laserfiche.
3. The Laserfiche Team will notify the Unit Admin when the change is completed.

## Users Transferring Units Account Procedures

Laserfiche Users transferring from one AgriLife/CVM/SRS unit to another AgriLife unit:

1. When a Laserfiche user transfers between AgriLife units, the original account must be deleted and a new account added. This is to preclude access which has been granted by specific user logon name. The Unit Admin for the losing unit will follow the Account Termination procedures and the gaining unit will follow the New Account procedures.
2. If the Laserfiche Team is asked to transfer an account, they will refer the Unit Admin(s) to the correct account management procedures.

## Account Termination/Deletion Procedures

1. **For AgriLife and College of Veterinary Medicine Employees:** To terminate (delete) a Laserfiche Account, an AgriLife People Unit Account Manager will go into AgriLife people and request access to the Laserfiche system be revoked/deleted. **For SRS:** Complete page two of an AG-704, *Document Management System-User Access* form. The top of the form will be completed (e-mail not required) and check the "Delete User" block. The Unit Admin will then sign the form and submit it via First-Call to the Laserfiche Team. A Unit Head signature is not required to delete a user account. (Note: An account may also be deleted at the request of the Unit Head or designee)
2. Upon receipt of the notification to terminate access, the Laserfiche Team will delete the account and place the form/First-Call ticket in the appropriate folder for the Workflow to route the document to the appropriate folder. (Note 1: The Laserfiche Team will make every attempt to delete accounts within 24 hours of the request. Note 2: For an involuntary termination of an employee with a Laserfiche user account, the Laserfiche Team may disable the account upon a telephone or e-mail request and delete the account as soon as the form/First-Call notification is received.)

### **Additional Account Procedures**

1. In accordance with AgriLife Research/Extension Procedures 29.01.99.A/X0.05, *Information Technology Account Management Procedures*; and College of Agriculture Guideline, *Information Technology Account Management Procedures*, section 4, Laserfiche Accounts will be reviewed monthly and the following actions taken:
  - a. Any account for which the user has not logged in within the past 120 days, the account will be disabled. The Laserfiche Team will notify the appropriate Unit Admin of the action and will re-enable the account if requested by the Unit Admin, in which case the user must log in within the next 5 business days.
  - b. Any account for which the user has not logged in within the past 150 days will be deleted. The Laserfiche Unit Admin may request the account be reinstated by requesting access in AgriLife people if the user is an AgriLife Employees or by completing page 2 of the Ag-704 form for SRS employees (this will require only the Unit Admin signature). For a reinstated account, the user must log in within 5 business days unless there are extenuating circumstances.
2. Accounts that are deleted will be annotated as “Deleted due to non-use” with a non-use stamp and placed in the terminated account section of Laserfiche.