Routing a Contract in Laserfiche

This documentation refers to Laserfiche's online client

Last Updated by Jamie Trierweiler 02/19/2018

Step 1: **Scanning a Contract**

IMPORTANT: When uploading a scanned document, make sure to scan the document as a tif image file. The tif image file format is necessary for signing and stamping a contract document.

- It's a good idea to do some preliminary work ahead of time
    - Whenever possible, have the contract signed by the other party, then scan it as a .tif file.
    - Scan the contract and the supplemental documents, name them properly, and collect them all in one place.
- Start the process as shown below.

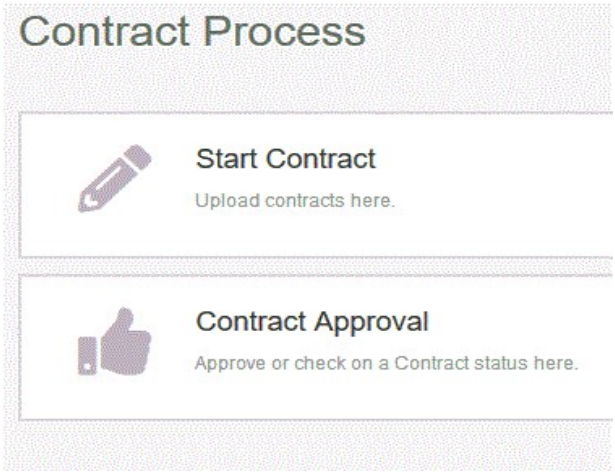
NOTE: This tif image of your contract will be later uploaded in your creation of the Laserfiche form.
*Have your tif file accessible on your computer. Easiest if sent to your email upon scan.

Step 2: **Laserfiche Forms Login**

- Open a web browser and go to **edocs.lansingmi.gov**

  IMPORTANT: * If testing, please use:

- Under the Contract Process Section, select the **Start Contract** button to begin the **Contract Process**.

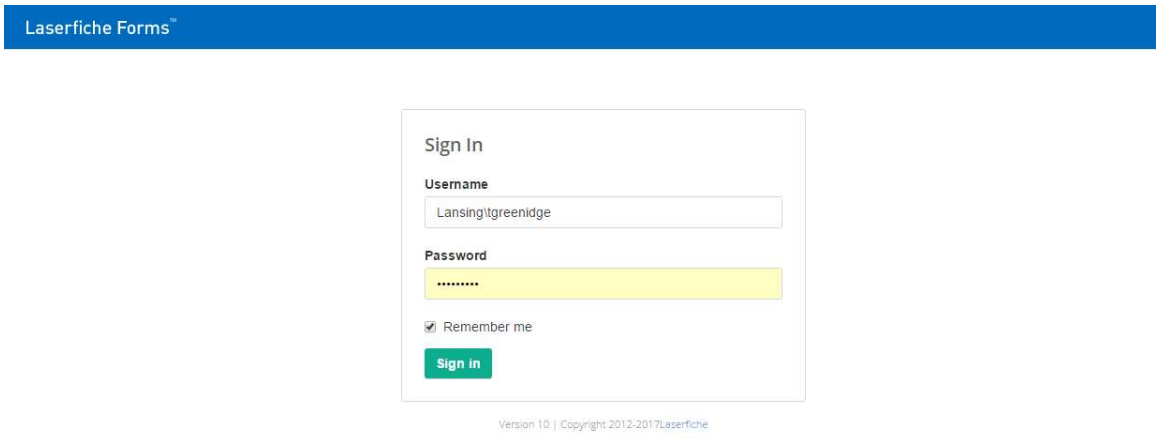


- Here, you will need to login using your City of Lansing domain credentials like displayed below:

  * If you are not able to sign in please contact our IT helpdesk by creating a ticket or by phone at 517-483-HELP.

  Username: Lansing\username

  Password: ••••••••



Step 3: **Creating a New Contract Form**

- The explanation of the fields is as follows:

- **Contract Creator** - Person who is filling out this contract form
- **POC (Point of Contact) Person** – Person to be contacted about this contract
- **POC Phone** – Phone number
- **POC Email** – Email
- **POC Department** – Department/Division
- **Contract Type**– Select the type of contract
- **Amendment** – Notifying whether this contract is an amendment to an existing contract (Yes) or a new contract (No)
- **Vendor Name** – With whom the City is contracting
- **Vendor Number** – This is City of Lansing vendor number supplied by Purchasing/Finance
- **Approval Deadline** – Date by when the contract needs to be approved
- **Contract Start Date** – Date by when the contract will start
- **Contract End Date** – Date by when the contract will terminate
- **Account #** – Account Number to be charged for the contract
- **Purchase Order** – PO number supplied by Purchasing/Finance, if available
- **Deadline Info** – Here you can include more information on the contract's deadline
- **Contact Summary** – A *brief* summary of relevant contract data for approvers

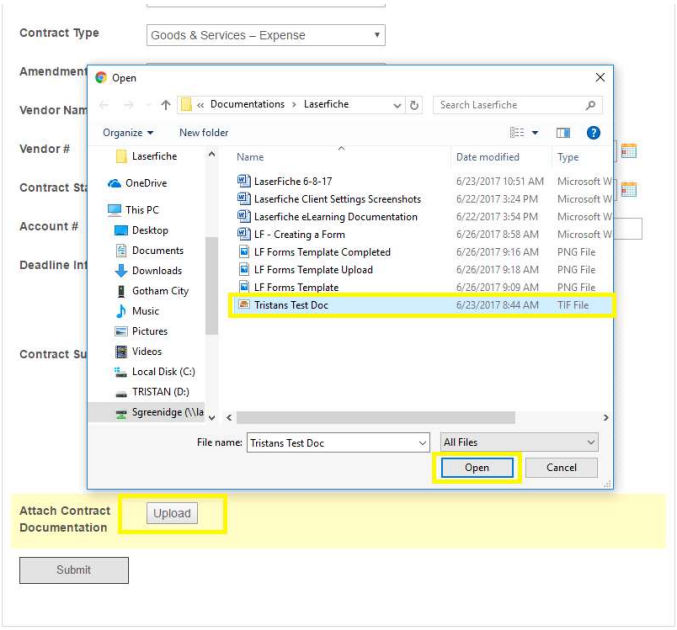
An example of a **Contract Form Submission** is shown below in the image:

Contract Submission

Contract Creator	Tristan Greenidge
POC Person	Tristan Greenidge
POC Phone	517-483-6839 (NNN) NNN-NNNN xNNN
POC Email	tristan.greenidge@lansingmi.gov
POC Department	Information Technology
Contract Type	Goods & Services – Expense
Amendment	NO
Vendor Name	The Green Edge LLC
Vendor #	238329
Approval Deadline	6/30/2017
Contract Start Date	7/3/2017
Contract End Date	7/28/2017
Account #	72435-34548
Purchase Order #	68567843
Deadline Info	Would like to have this contract signed and approved by Friday the last day of the month.
Contract Summary	Web technology services
Attach Contract Documentation	Upload Tristans Test Doc.tif 434KB X

Submit

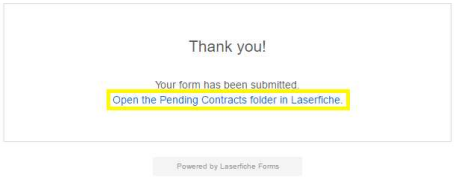
- Attach the contract document and supplemental documents that you scanned earlier. Click the **Upload Button,** then select the file(s) to attach. Remember, the contract file *must* be in .tif format for it to be signable:



- Upon completion, select the **Submit Button** to finalize your contract form.

- Once finalized you will be directed to the following page:

- **To view Pending Contracts**, select the link highlighted in the example image below stating to *Open the Pending Contracts folder in Laserfiche*. Or, you may use the method detailed in step 4, below.



Step 4: **Pending Contracts**

Viewing Pending Contracts

- Open a web browser and go to **edocs.lansingmi.gov**

  IMPORTANT: * If testing, please use:

- Under the Contracts Section, select the **Get Started** button to begin the **Contracts Approval**.

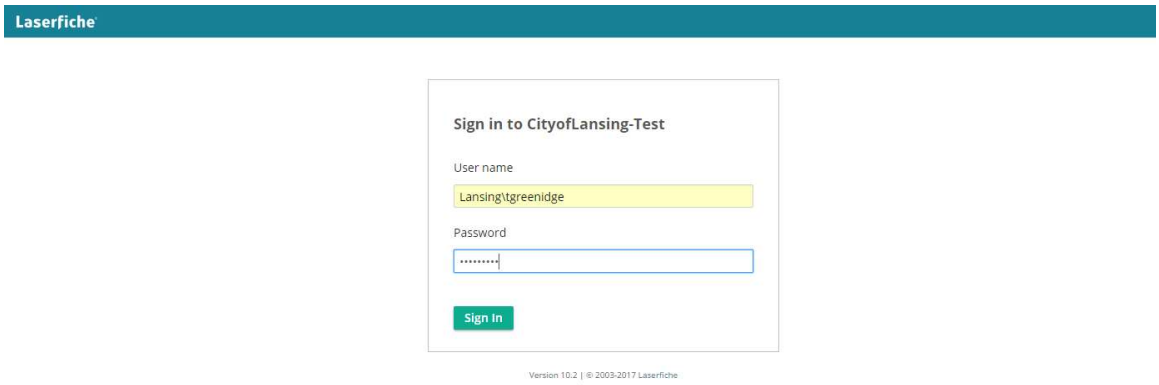
- You will be redirected to the Laserfiche Repository.

- Here, you will need to login using your City of Lansing domain credentials like displayed below:

  Username: Lansing\username

  Password: ••••••••

  Note that this is a separate login instance from the login in Forms.

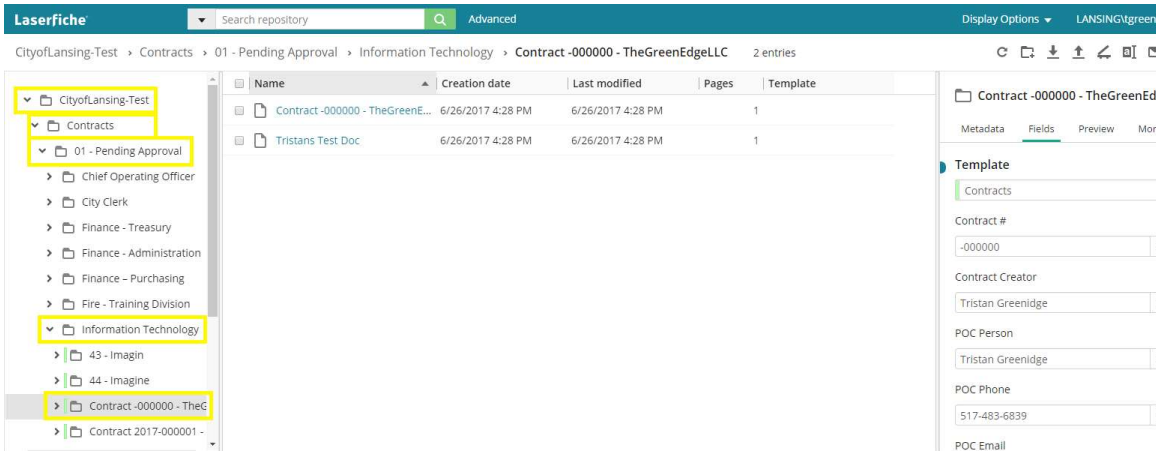


- Once logged in, navigate to the contract just created by selecting the appropriate drop-downs in the left navigation menu panel.

  - Note that depending on the size of your contract and other documents, and the speed of the network, it may take several minutes to rename the file to the standard,

    Contract – 00000x – Vendor Name. Until the rename happens, you can

view the folders; but do not open the new folder; otherwise you will cause a file lock error and the process will terminate.



- Select the **City of Lansing Folder**

  Select the **Contracts Folder**

  Select the **01 - Pending Approval Folder**

  Select the **Department Folder** necessary

  Select the **Contract Folder**

  (Links are highlighted in the above image).

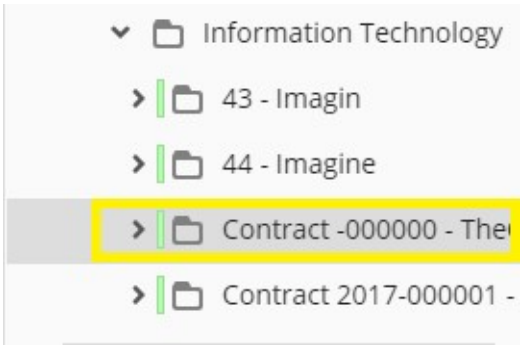
7. In the example image above the **Contract -000000 Folder** is selected.

The main window or middle panel displays:

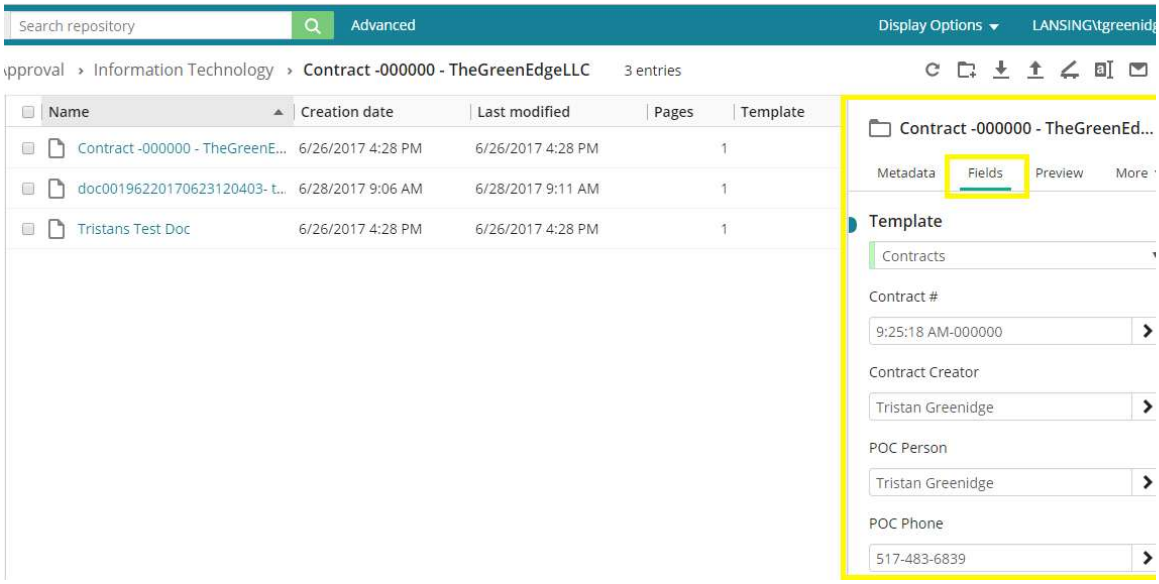
- The contract (*Contract -000000*)
- The uploaded tif file (*Tristans Test Doc*)

Viewing Contracts Fields

- To view the contract's fields, be sure to have the contract's folder (**Contract - 000000**) selected in the left panel. As shown below, the contract is under its corresponding department folder.

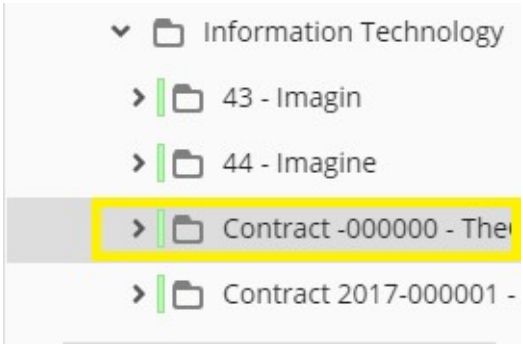


- In the panel to the right, you can **view** the information of the contact form.

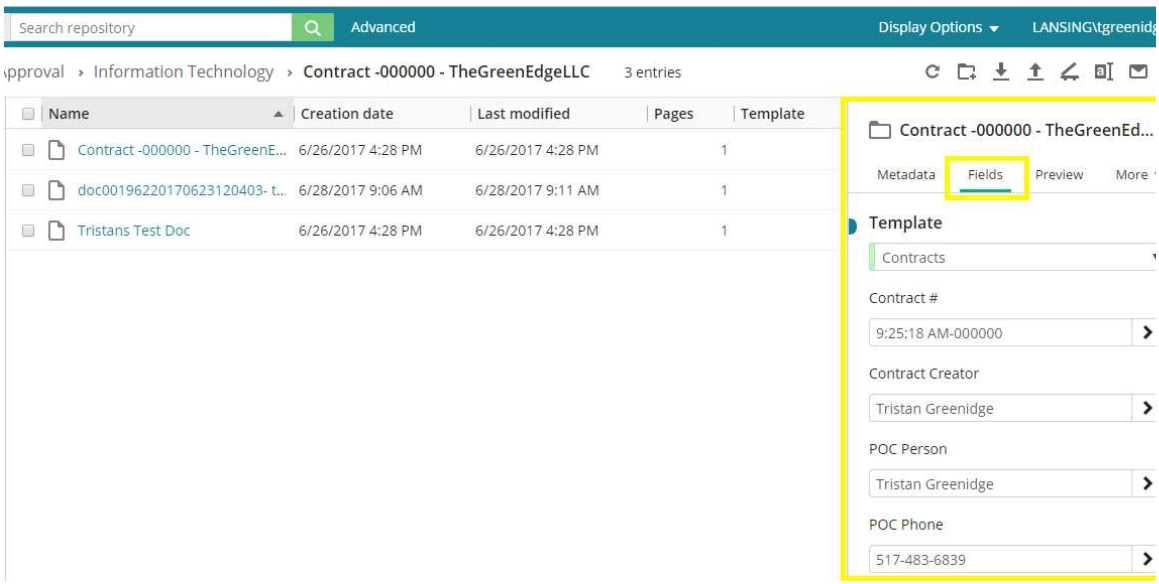


Editing Contracts Fields

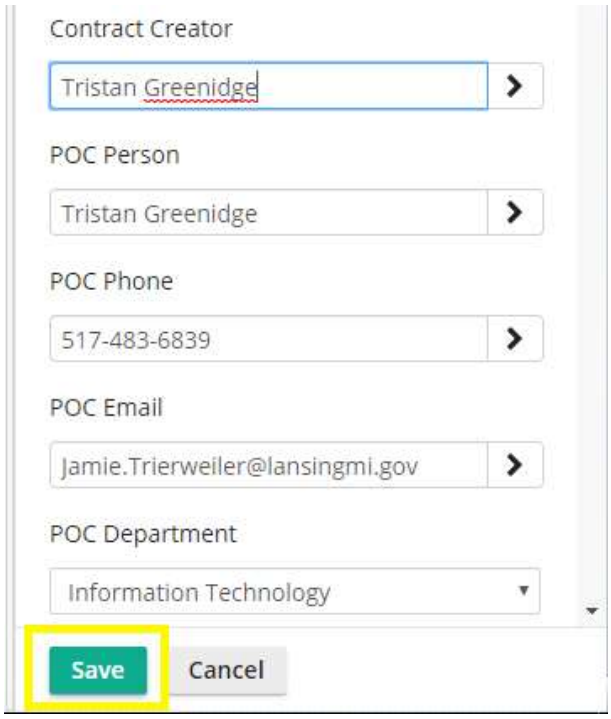
- To edit the contract's fields, be sure to have the contract's folder (**Contract - 000000**) selected in the left panel. As shown below, the contract is under its corresponding department folder.



- In the panel to the right, you can **edit** the information in the contact form by selecting the desired text field and simply changing the content. This alters the metada but does not alter the image that has been stored.

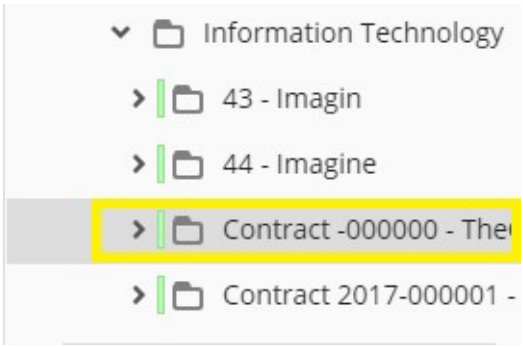


- Once changes have been made, a save button will appear on the bottom of the right panel. Select the **Save Button** to save the changes as shown to the right.

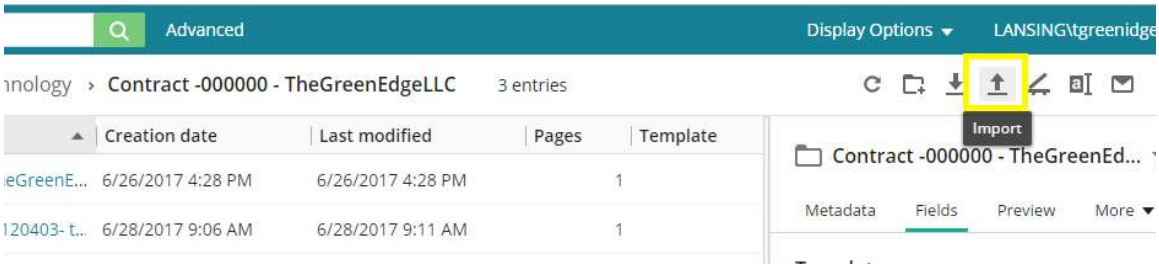


Adding Additional Files to a Contract (Import Icon)

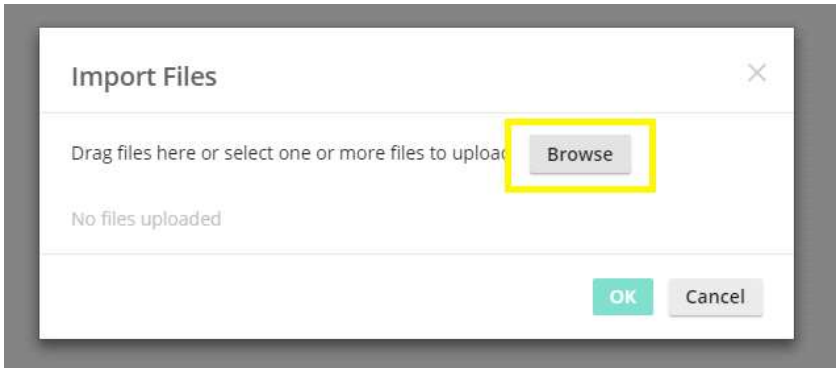
- To add additional documents to the contract, be sure to have the contract's folder (**Contract - 000000**) selected in the left panel. As shown below, the contract is under its corresponding department folder.



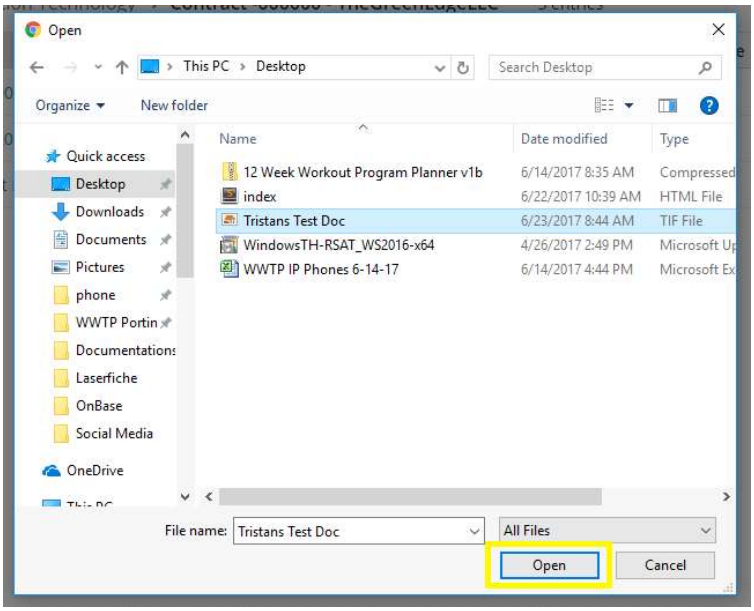
- In the icon menu on the top right, select the **Import Icon**.



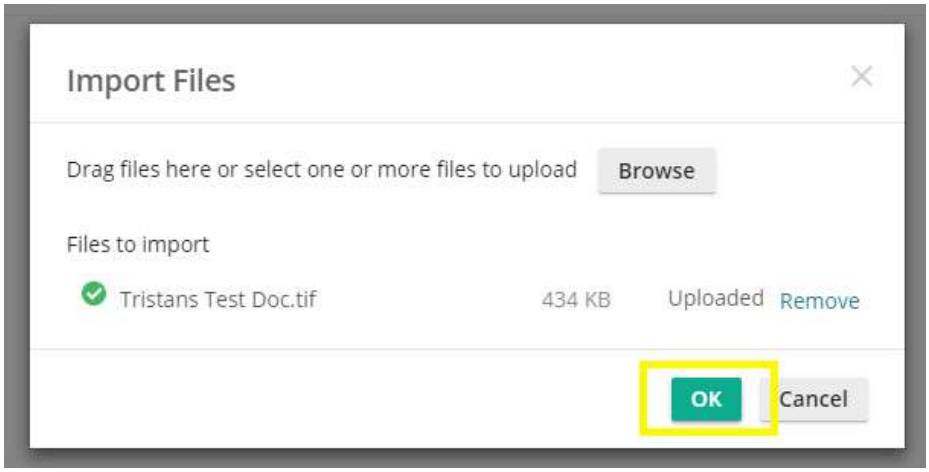
- Select the **Browse Button** to choose a file to upload.



- Select the file desired and click the **Open Button** to continue.



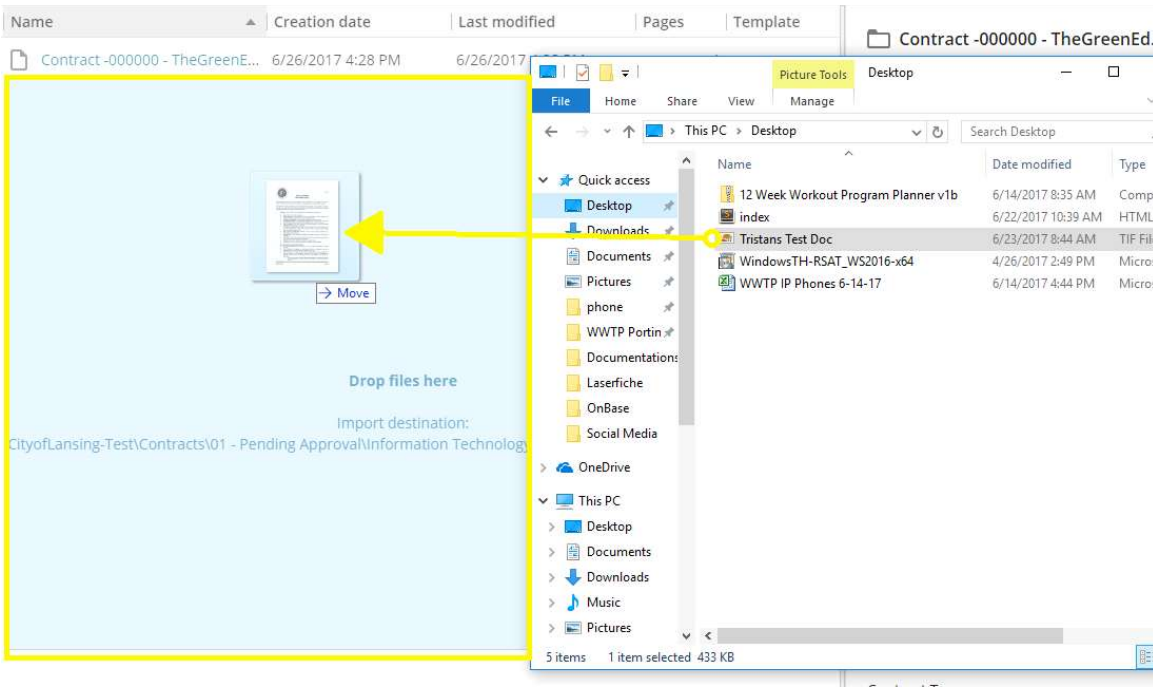
- Select **OK Button** to import the file or the remove button to remove the file.



- Your additional file has now been added to the contract folder.

Adding Additional Files to a Contract (Drag and Drop)

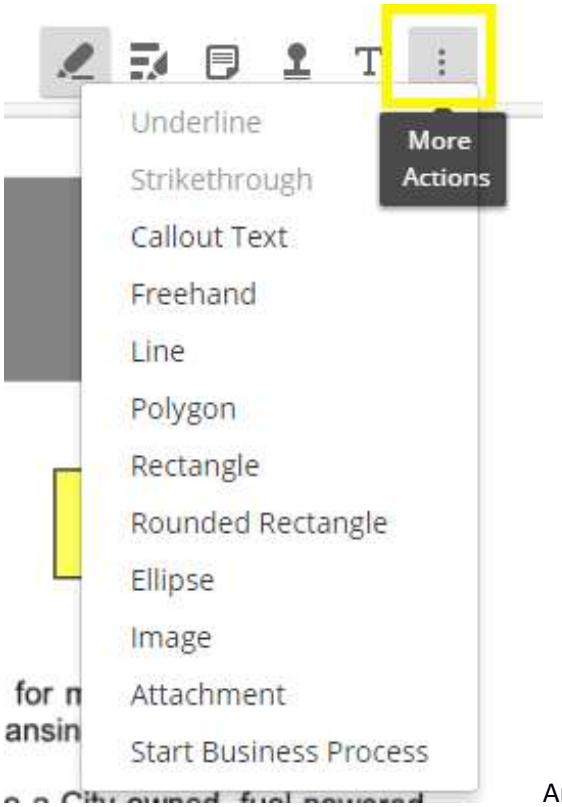
- The Drag and Drop feature is another way to add a file.
- Simply click and hold the file desired in the Explorer Window. Then drag the file and let in go in the blue container that states to *Drop files here*. (Shown below)



- Your additional file has now been added to the contract folder.

Step 5: **Annotations (Editing a Contract)**

Annotations



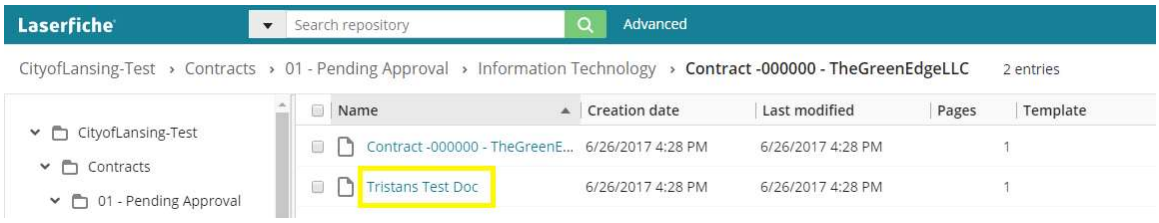
Annotations include:

- Highlights
- Redactions
- Sticky Notes
- Stamps
- Text Boxes

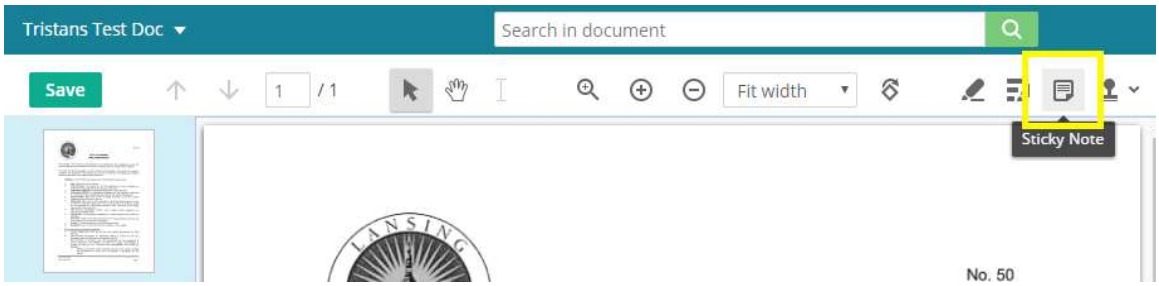
Note: Links to Annotations are displayed in a menu as shown in the image to the right. Feel free to explore the **More Actions Button** for more annotations.

Applying a Sticky Note (Required if any signatures are needed!)

- To view the attached document, double click on the contract tif link.

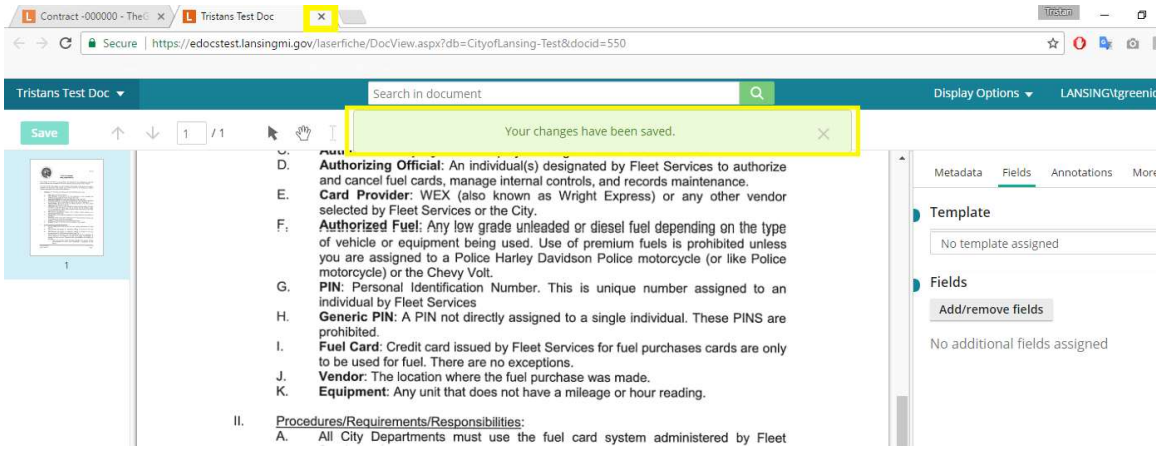


- Select the **Sticky Note Icon** and apply where needed. You should use sticky notes to show where signatures are required, as well as for any other points of interest in the document.



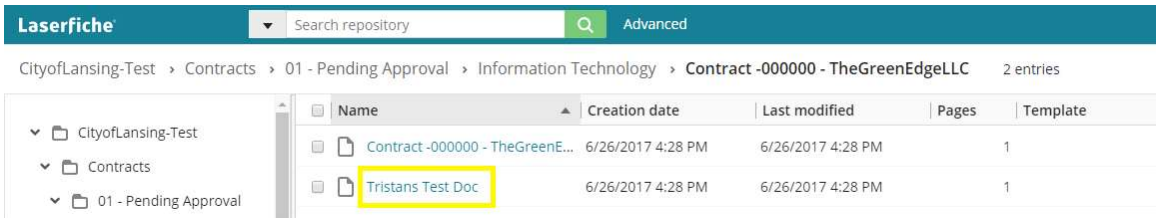
- Click **Save** after applying the sticky note(s)

- Once you select the save button a green alert will appear on the top of the site stating you're your changes have been saved. To **Return to Folders** view, simply close this pages tab at the top of the web browser.

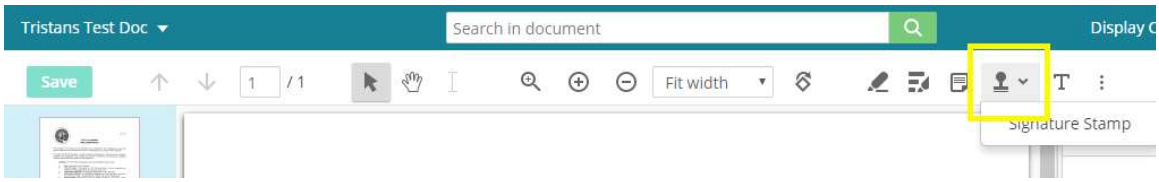


Applying a Stamp including Signatures/Dates/Approved as to Form as needed

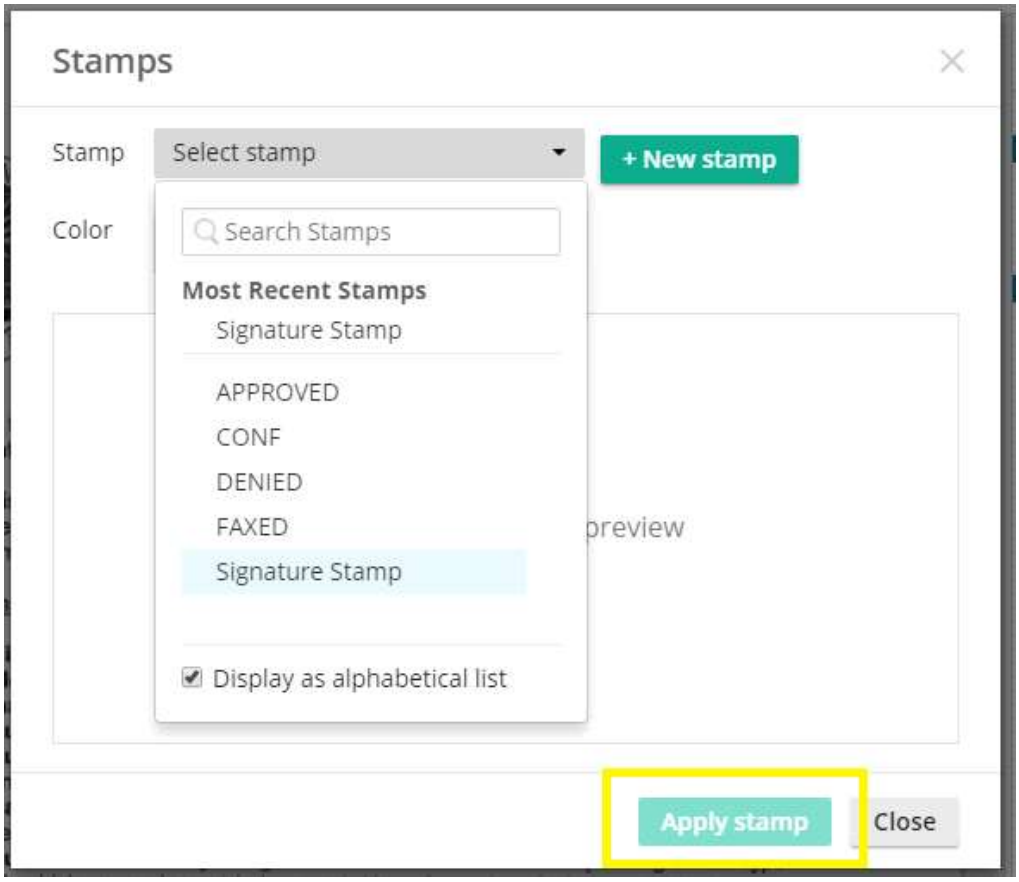
- To view the attached document, double click on the contract tif link.



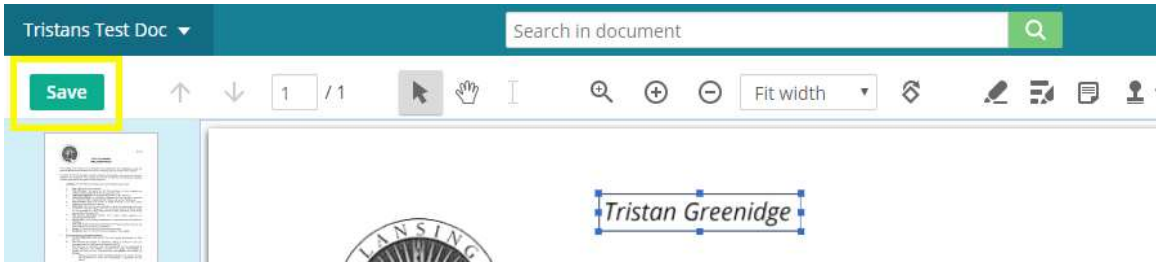
- Click the **Stamp Icon** on the top menu bar**.**



- Choose which stamp to apply and select **Apply Stamp.**

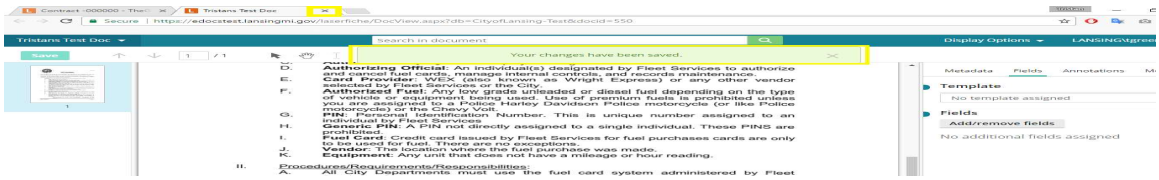


- Click to place the signature stamp and select **Save** as shown below



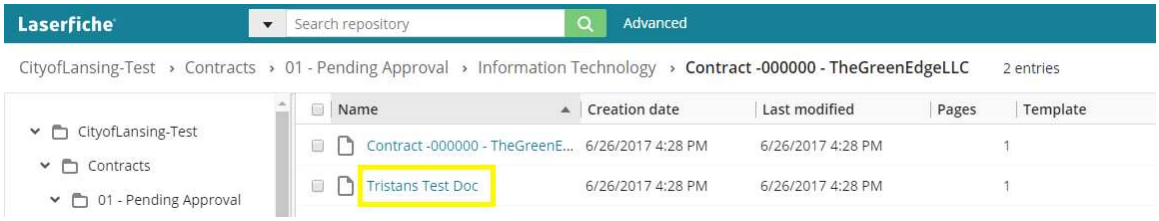
- Once you select the save button a green alert will appear on the top of the site stating you're your changes have been saved. To **Return to Folders** view, simply close this

pages tab at the top of the web browser.

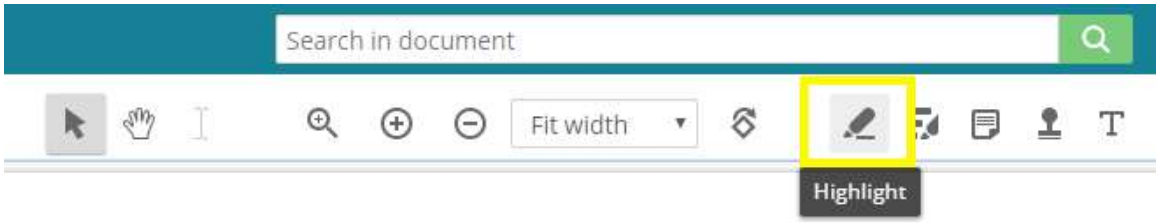


Applying a Highlight

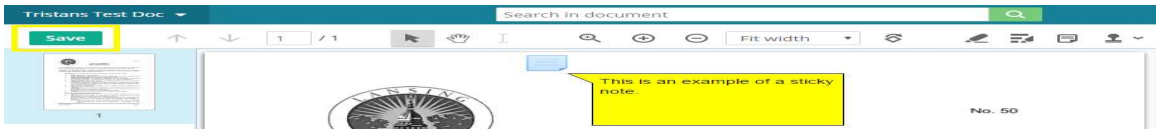
- To view the attached document, double click on the contract tif link.



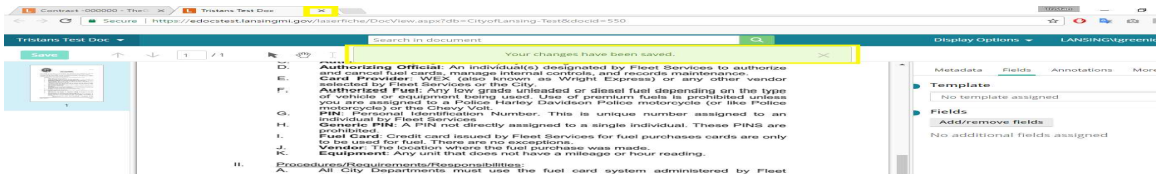
- Select the **Highlight Icon** and apply where needed.



- Click **Save** after applying the sticky note(s)

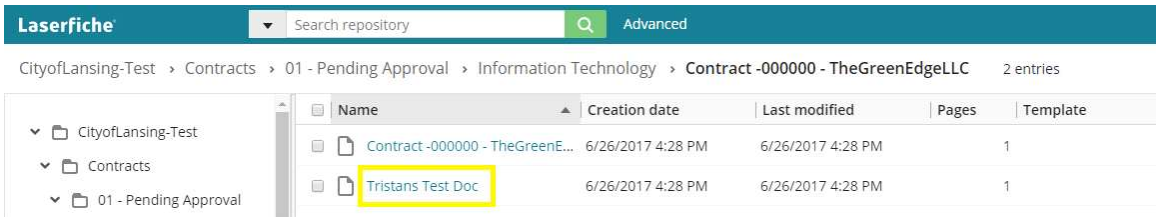


- Once you select the save button a green alert will appear on the top of the site stating you're your changes have been saved. To **Return to Folders** view, simply close this pages tab at the top of the web browser.

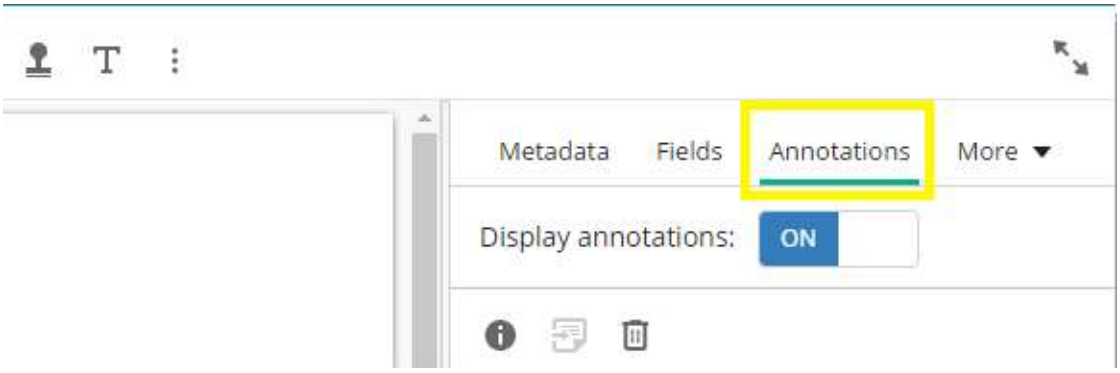


Viewing a List of all Annotations

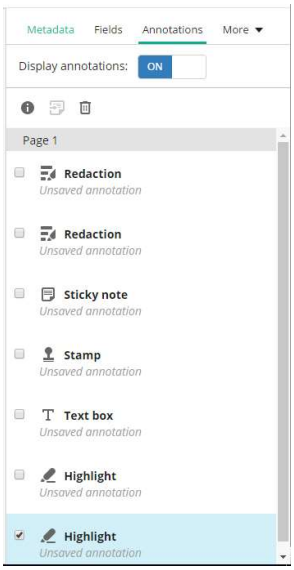
- To view the attached document, double click on the contract tif link.



- To view Annotations, select the **Annotations Tab** in the right panel.

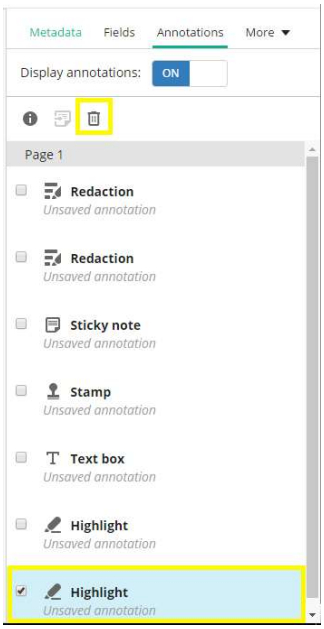


- Under the Annotations Tab, is displayed a list of all the annotations reguarding the current document opened (Shown below).

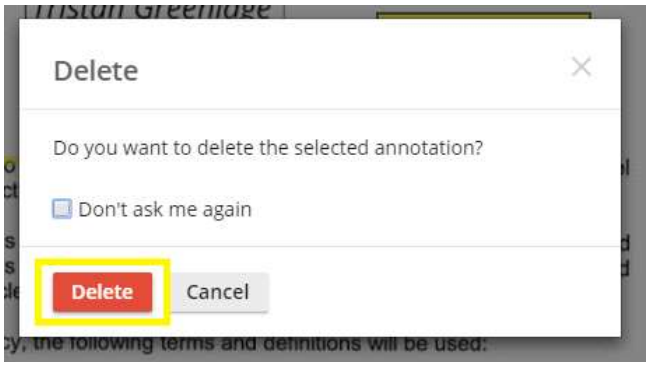


Deleting Annotations

- To delete an annotation, simply select the annotation desired in the Annotation Tab, then select the **Trash Icon** up above.



- In the popup confirm the delete of the annotation by selecting the **Delete Button**.

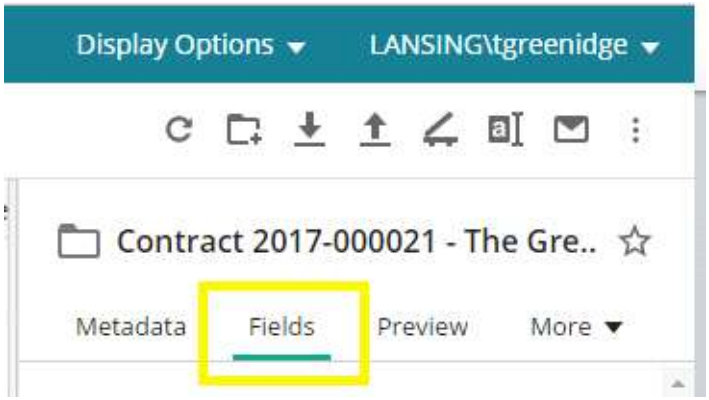


- **NOTE:** You can also delete an annotation by clicking it on the document and hitting the delete button on your keyboard. The same prompt as above will appear, so select delete to delete the annotation.

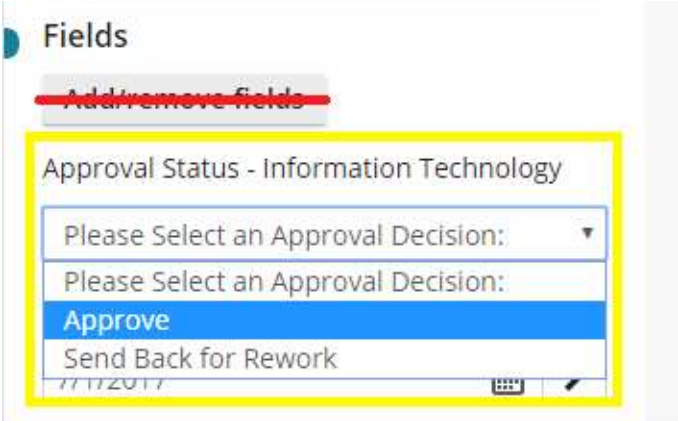
Step 6: **Contract Approval**

Approving a Contract

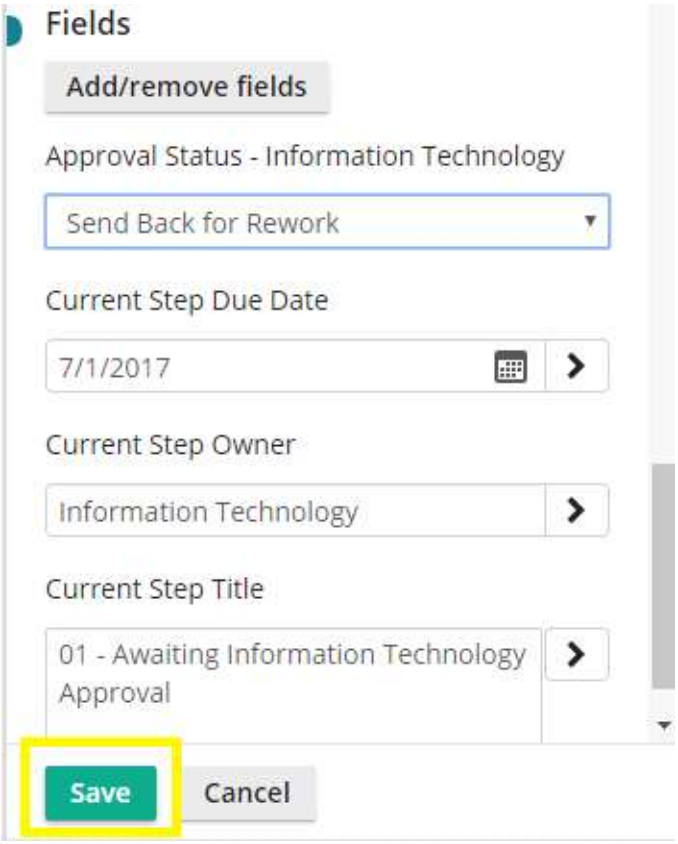
- Make sure all required documents are included and all signatures are applied prior to approval.
- In the right panel, select the **Fields tab**. (The right panel allows you to view all the information relavent to the contract).



- To start the contract approval process, the creating department must complete their approval.
- To approve the contract scroll down in the right panel to the **Fields Section** and under **Approval Status**, select the drop-down and select **Approve**.

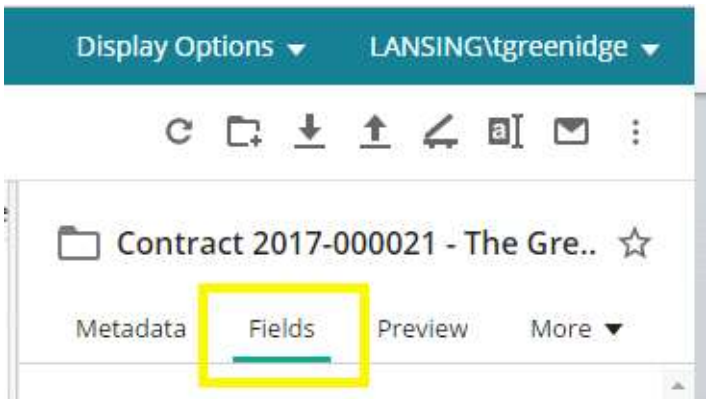


- After approval and clicking **Save**, the document has now been sent to the next step for approval.

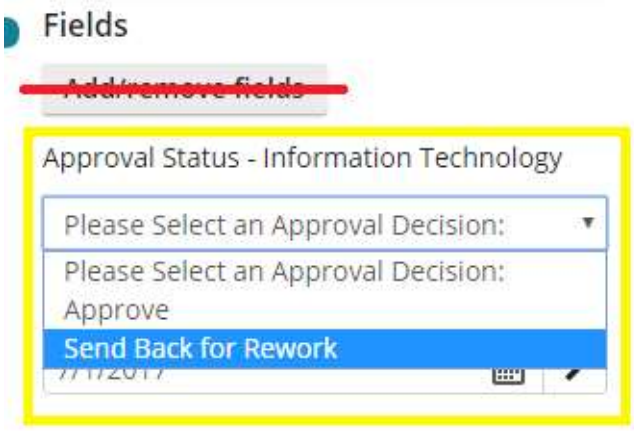


Sending Back for Rework

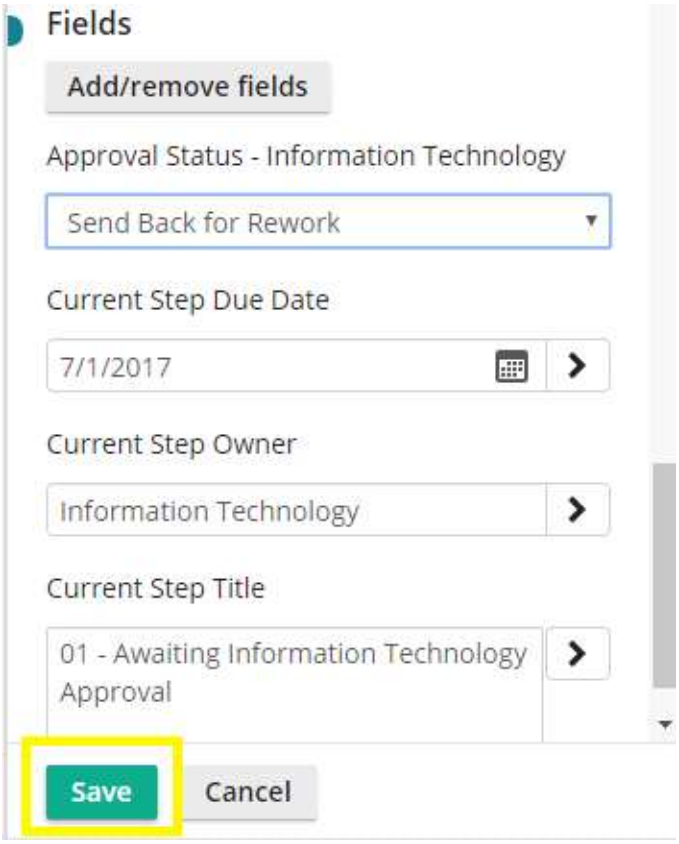
- In the right panel, select the **Fields tab**.



- To send a contract back for rework, scroll down in the right panel to the **Fields Section** and under **Approval Status**, click the drop-down and select **Send Back for Rework.**



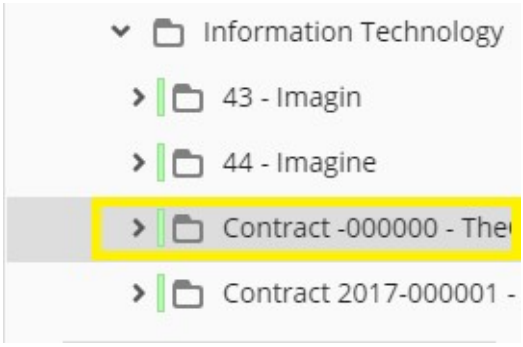
- After Send Back for Rework is selected and the **Save** button is clicked, the document is now being sent back for rework.



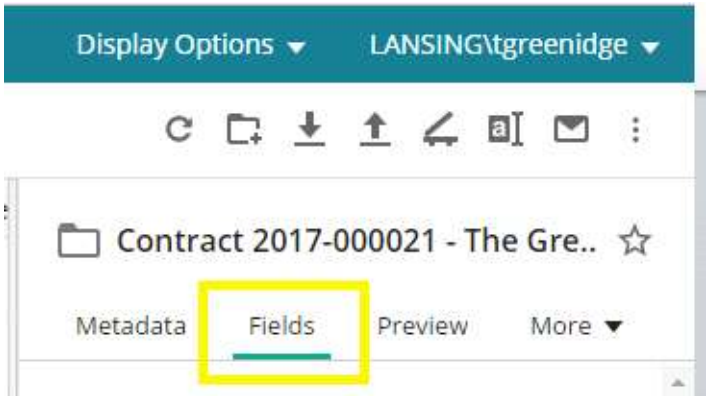
Step 7: **Status of a Contract**

Viewing the status of a Contract

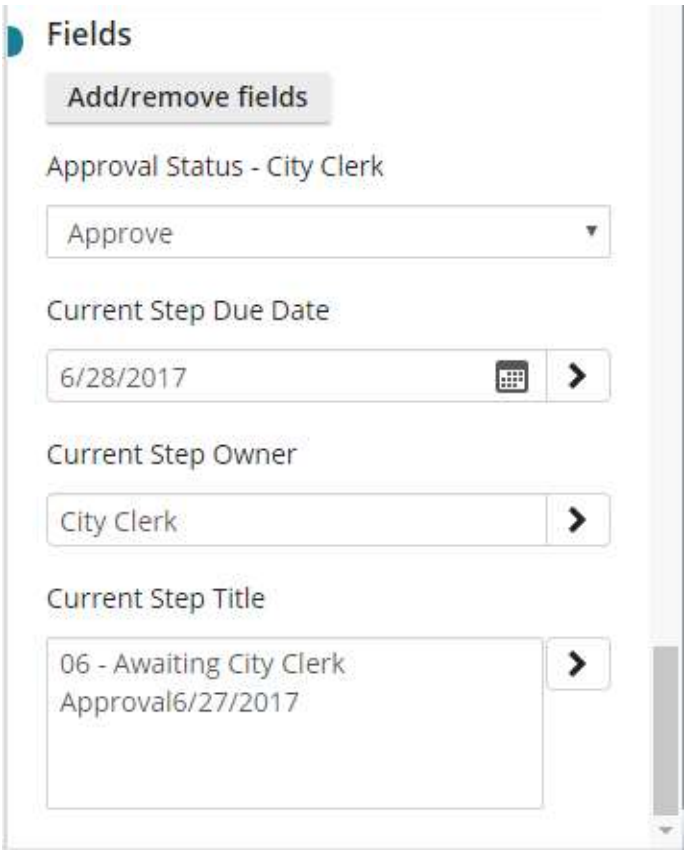
- To view the status of a contract, be sure to have the contract's folder (**Contract - 000000**) selected in the left panel.



- In the right panel, select the **Fields tab**.

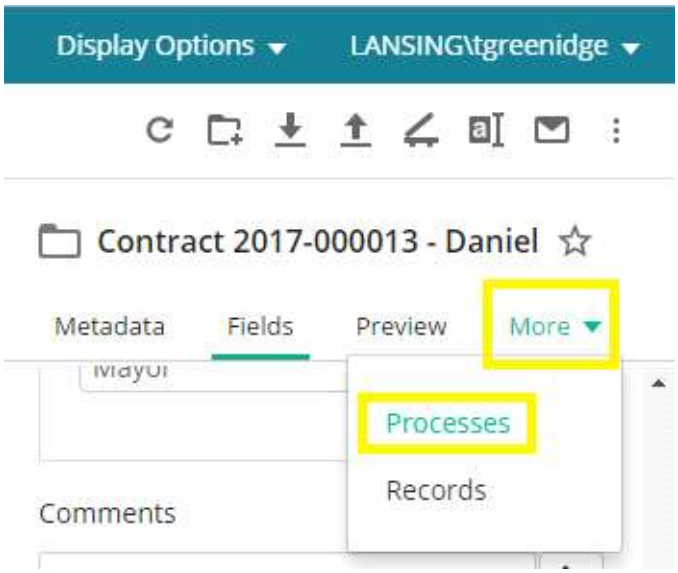


- If you scroll all the down to the **Fields Section,** here you can view the status of the contract.



Viewing the process of a Contract

- To view the process of the contract, in the right panel, select the **More tab** and **Processes**.



- Here you can view:
    - Business Process
    - Current Step
    - Duration (life of the Contract)
    - History

Shortcuts

Coming Soon …

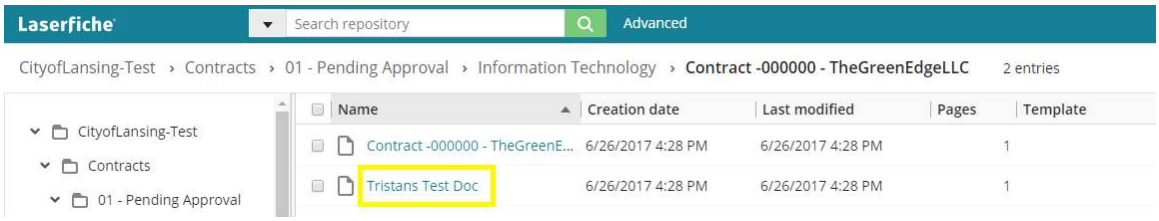
Contract Routing Paths

Contract Type	Route
Construction	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Construction Change Order	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Development Agreement	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Extended Service Warranty / Agreement	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Goods & Services – Expense	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Goods & Services – Revenue	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Grant Goods and Services (Expense)	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Grant Revenue	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Leases – Expense	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Leases – Revenue	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Letter of Intent	Creating Department > COO > Mayor > Clerk
License Application	Creating Department > LPD > City Attorney > COO > Mayor > Clerk
License Application – Liquor	Creating Department > LPD > City Attorney > COO > Mayor > Clerk
Loans and Liens	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Maintenance	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Memo of Understanding	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Mutual Aid	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Other (for Mayor's Office use ONLY)	Creating Department > COO > Mayor > Clerk
Permits	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Real Estate Lease/Purchase	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Services in Kind	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Shared Facilities	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk
Shared Services	Creating Department > City Attorney > Finance - Admin > COO > Mayor > Clerk

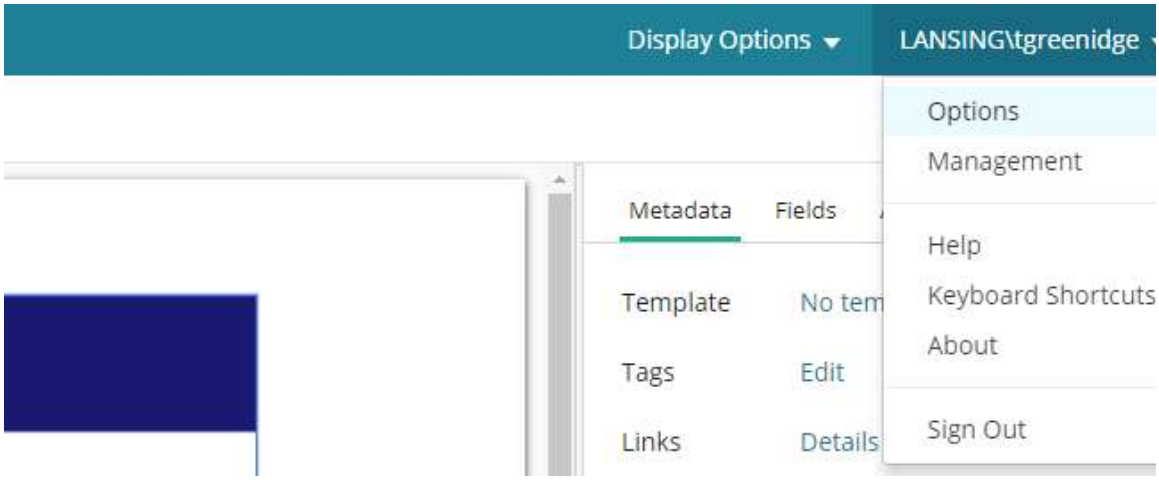
Step 8: **Printing Documents**

Printing a Document with Annotations

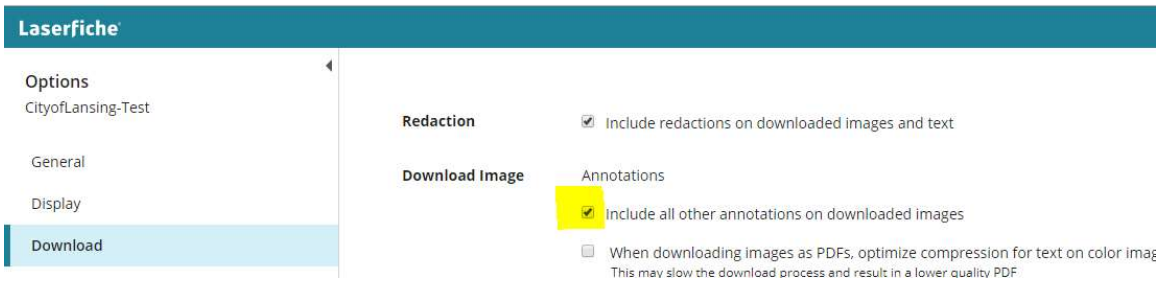
- To view the attached document, double click on the contract tif link.



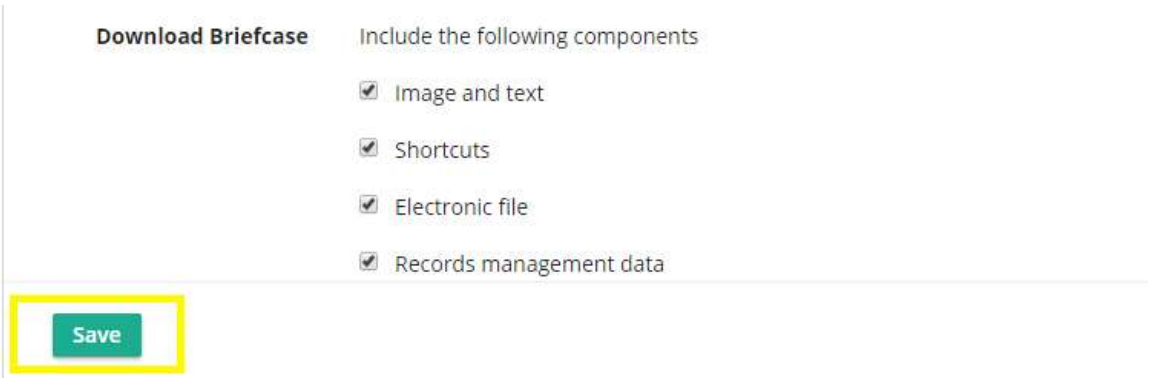
- Once viewing a document, click on your account in the top right and select **options** like shown below:



- To print a document **with** annotations make sure the checkbox below is selected.

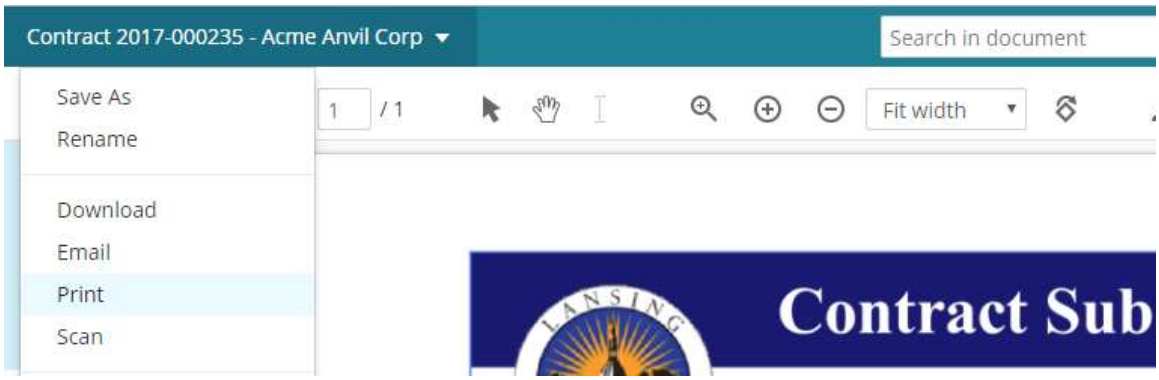


- If changes are made, make sure to click the **save** button at the bottom of the page as shown below:

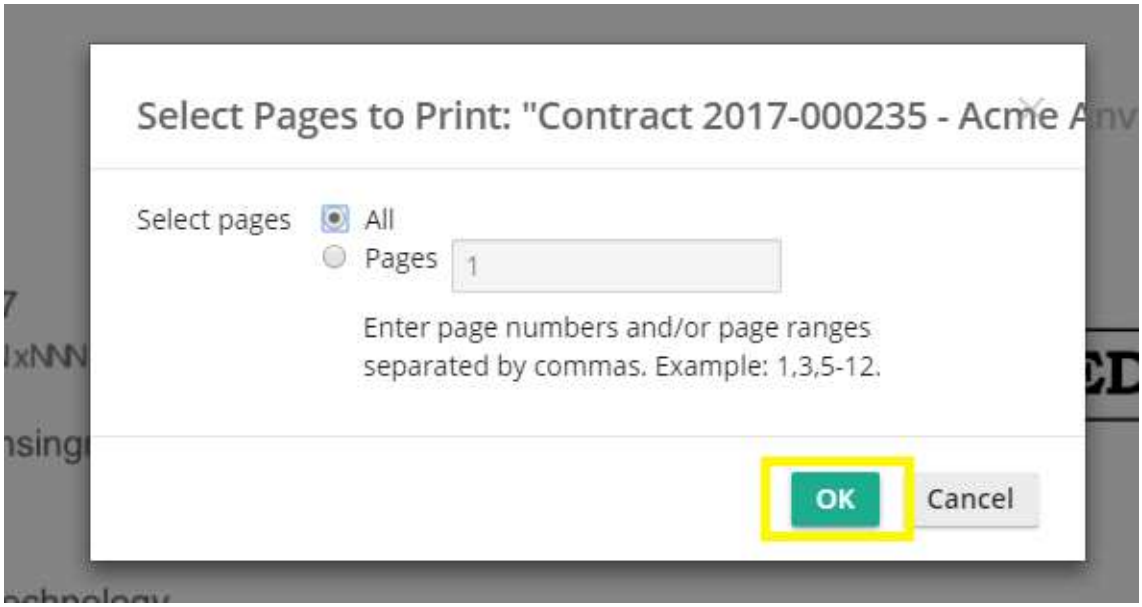


- Once Option settings are completed and saved, you can close the browser tab to go back to your document.

- In the upper lef t select your contract and click on the Print option as below:



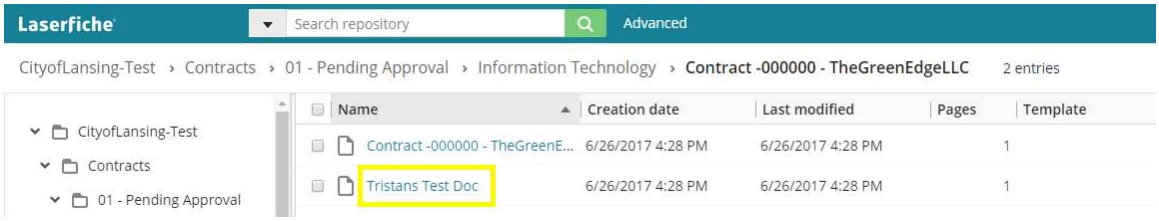
- Select the OK button to print.



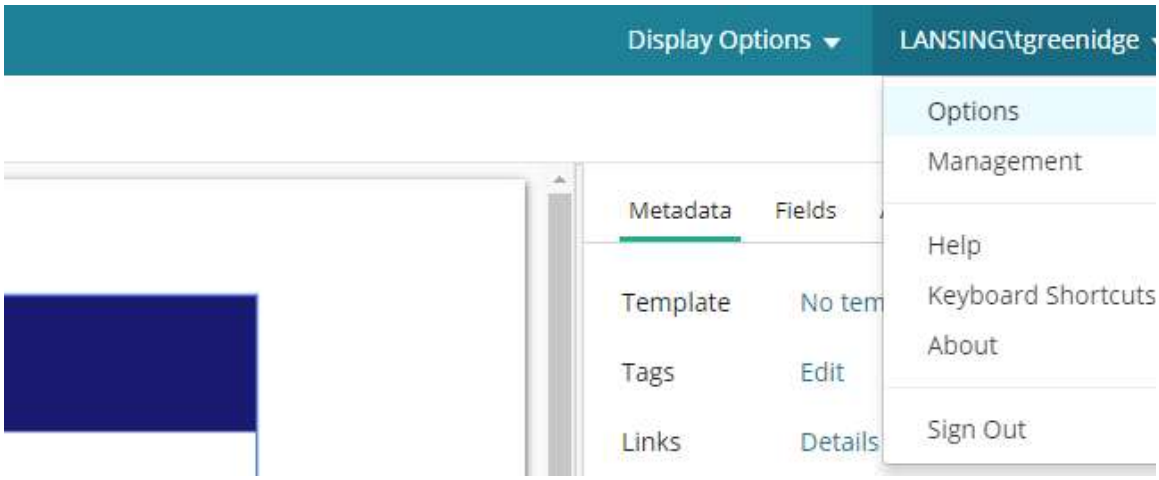
- You will be taken to the Print Preview where you can preview your print job.

Printing a Document without Annotations

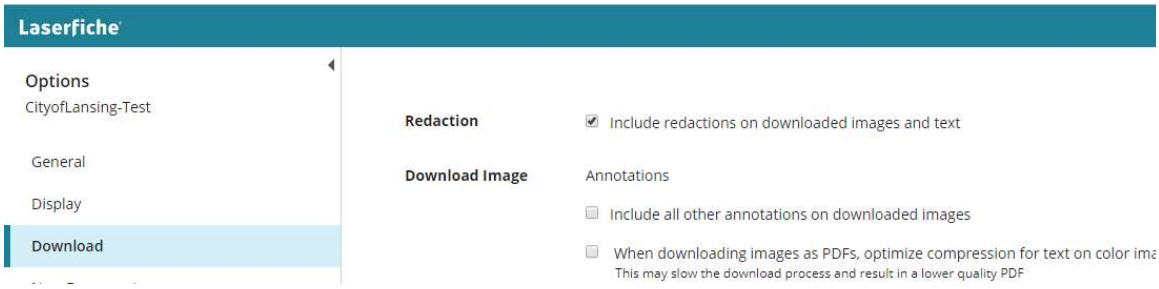
- To view the attached document, double click on the contract tif link.



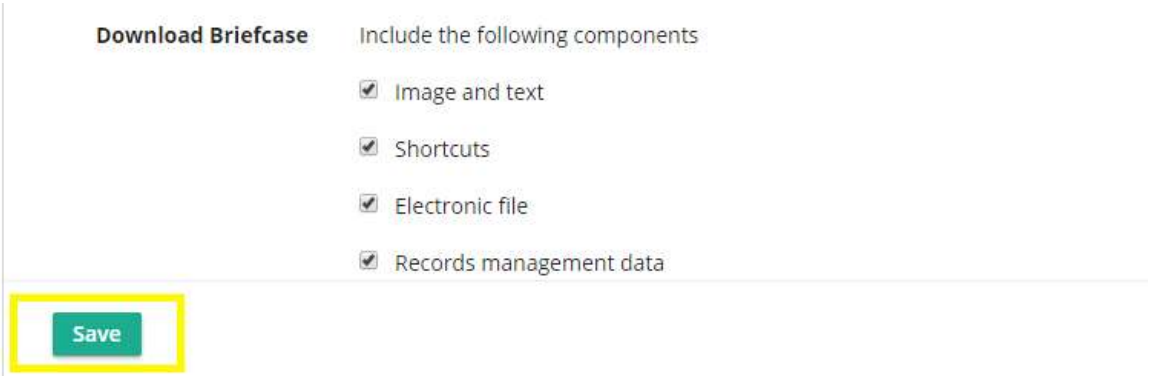
- Once viewing a document, click on your account in the top right and select **options** like shown below:



- To print a document **without** annotations make sure the checkbox below is selected.



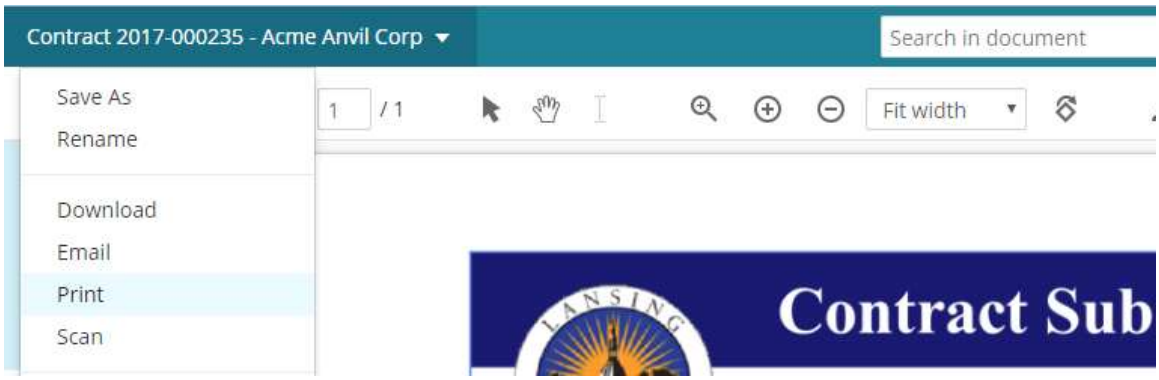
- If changes are made, make sure to click the **save** button at the bottom of the page as shown below:



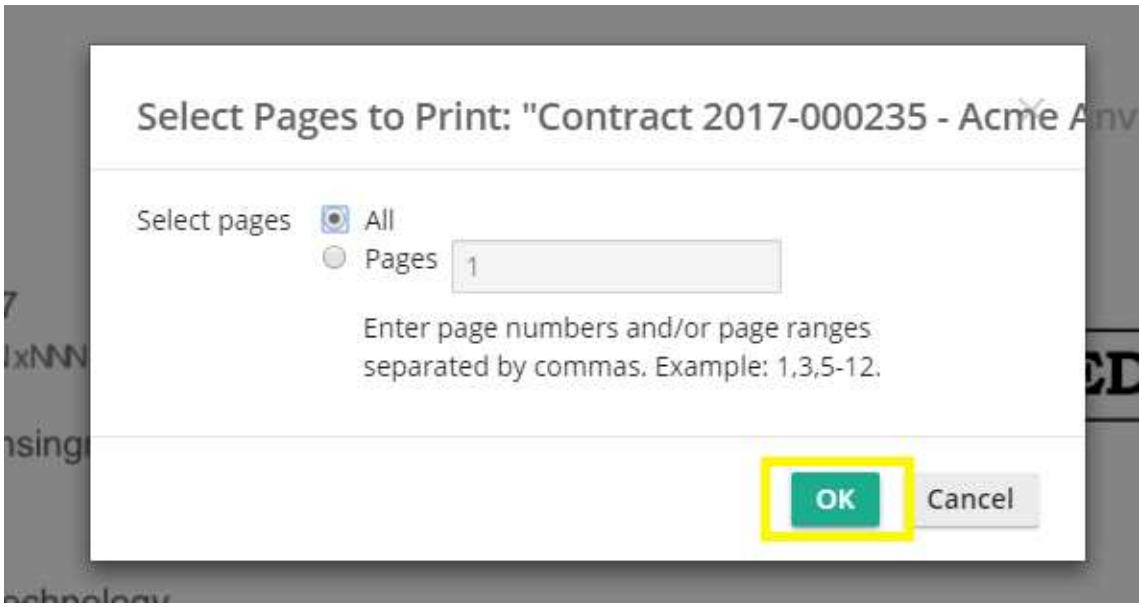
- Once Option settings are completed and saved, you can close the browser tab to go

back to your document.

- In the upper lef t select your contract and click on the Print option as below:



- Select the OK button to print.



- You will be taken to the Print Preview where you can preview your print job.