AGENDA ITEM or FINAL CONTRACT REVIEW SUBMITTAL FORM

AgendaTitle:
Out-of-State Travel Request; Assistant Finance Director Ben Cowan; Laserfiche Empower 2015 Conference; Anaheim, CA; 1/12/15 – 1/17/15; $1,503.40

Action Requested: Motion

Parties to the Agreement:

Term Begins: **Term Ends:** **Grant Contract #:**

Summary:
Please see attached memo. I am requesting $1,500 for out of state travel to Anaheim, CA for the 2015 Laserfiche conference.

Fiscal Impact: $1,500

Submitted by: Ben Cowan **Submitter's Email Address:** bcowan@gunnisoncounty.org

Finance Review: (●) Required ( ) Not Required

Comments:

I support this use of travel budget as the conference is timely and very useful. We will gain future savings in the form of process improvement from this investment of training dollars now.

Reviewed by: GUNCOUNTY1\lNienhueser Discharge Date: 10/23/2014

County Attorney Review: ( ) Required (●) Not Required

Comments:

Reviewed by: Discharge Date: Certificate of Insurance Required Yes ( ) No ( )

County Manager Review:

Comments:

Reviewed by: GUNCOUNTY1\mbirnie Discharge Date: 10/23/2014

(●) Consent Agenda ( ) Regular Agenda ( ) Worksession Time Allotted:

Agenda Date: 11/4/2014 Follow Up Agenda Date:

Revised April 2013

Memorandum

To: Board of County Commissioners

From: Ben Cowan

CC:

Date: Wednesday, October 22, 2014

Re: Out of State Travel Request – Laserfiche Empower 2015 Conference

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As you might be aware, Gunnison County won the Laserfiche Document Management System Run Smarter award for Best Contract Management Initiative. This is a prestigious award to be recognized at the 2015 Laserfiche conference to the worldwide Laserfiche community. As part of the recognition, Mike Lee received a scholarship to pay for most costs related to the Empower 2015 conference in Anaheim, CA. Our consultant, Peak Performance Imaging Solutions, has offered to pay the registration fee ($695) for one other person to attend this four day training from January 13 through 16, 2015. This would allow me be a panelist for the conference presentation as I participated heavily in the design process for the Agenda Item/Contract Routing Process. Gunnison County would be responsible for the remainder of costs, estimated at $1,500. That means Gunnison County would save a third of the total costs to attend a four-day training.

Finance believes this would be a valuable training as we have at least three processes/workflows we would like to develop in the near future with the Document Management System:

1) Voucher Process
2) Employee Onboarding and Employment Records
3) Personnel Action Forms

Development of a Business Process Management system for the above projects can result in tremendous benefits for the organization in terms of productivity and accountability. For instance, the voucher process is entirely paper now. Many departments make copies of their invoices and vouchers, wasting both time and money. Then they are routed through the approval process and ultimately filed in Finance, where they are pulled many times by auditors or for research projects, etc. The project would allow the multiple copies with the paper and filing space to be eliminated. You could have access to all vouchers in the monthly voucher approval and be able to easily examine invoices and other backup documentation. The auditors or the public could potentially access the documents as well.

This conference is an opportunity to network with employees of other organizations struggling with the same problems as Gunnison County – managing the paper tiger and moving to a new era of having greater access to documents, better archival and file storage capabilities, and reducing the bureaucracy government is well-known for. It also offers a tremendous amount of training for both the administrator level tracks (Mike Lee) and user/design tracks for myself. By allowing both of us to attend, Gunnison County will gain a wealth of knowledge for Laserfiche so we can continue to "Run Smarter."

Finance will manage the unanticipated costs by splitting the costs between two years - airfare from the 2014 budget and the remainder of the costs from the 2015 budget as proposed without any additional requests.

Thank you for your consideration.

GUNNISON COUNTY, COLORADO

OUT-OF-STATE TRAVEL EXPENSE AND TRANSPORTATION FORM

DATE	PURPOSE OF OUT OF STATE TRAVEL	DESTINATION	DURATION FROM	DURATION TO
10/22/14	Laserfiche Empower 2015 ESTIMATE	Anaheim, CA	01/12/15	01/17/15

The Board of County Commissioners MUST approve all out of state travel *prior to occurrence.* A copy of the meeting minutes authorizing the out of state travel MUST be attached to this form.

Date Approved by BOCC	
Total Maximum Amount	

COUNTY PURCHASING CARD USAGE

Please attach a copy of each purchasing card receipt to this form and provide the original receipt and a copy of this form with your monthly Purchase Card Certification.

DATES -->	01/12/15	01/13/15	01/14/15	01/15/15	01/16/15	01/17/15			TOTALS
MEALS									
Breakfast		8.00	8.00	8.00	8.00	8.00			
Lunch	10.00	10.00	conf lunch	conf lunch	conf lunch	10.00			
Dinner	18.00	18.00	conf dinner	18.00	18.00				
TOTAL	28.00	36.00	8.00	26.00	26.00	18.00	-	-	**142.00**
LODGING	158.12	158.12	158.12	158.12	158.12				**790.60**
OTHER - Amount	25.00					25.00			**50.00**
Description	Airport Trans					Airport Trans			

TOTAL COUNTY PURCHASING CARD CHARGES **$ 982.60**

FLEET VEHICLE USAGE & OTHER EXPENSES

These are expenses that are neither reimbursable to the employee nor were they paid via the credit card.

NOTE: Gasoline purchases with the fleet fuel card do NOT need to be documented on this form. You may discard those receipts.

FLEET VEHICLE USAGE

DATE	FROM	TO	ODOMETER READING START	ODOMETER READING FINISH	TRIP MILEAGE	TOTAL
					0.0	
					0.0	

OTHER EXPENSES

DATE	DESCRIPTION	PAYMENT METHOD	AMOUNT
01/12/15	Airfare - GUC to LAX ($50 price fluctuation allowance)		470.80
	Bag Fees		50.00

TOTAL FLEET VEHICLE AND OTHER **$ 520.80**

EMPLOYEE REIMBURSEABLE EXPENDITURES

Please attach all supporting receipts to this form.

DATES -->	01/12/15	01/13/15	01/14/15	01/15/15	01/16/15	01/17/15			TOTALS
MEALS									
Breakfast									
Lunch									
Dinner									
TOTAL	-	-	-	-	-	-	-	-	-
LODGING									-
OTHER - Amount									-
Description									

TOTAL REIMBURSABLE EXPENDITURES **$ -**

MILEAGE EXPENSE DETAIL

I.R.S. Mileage Rate - 2014 56.00 cents per mile

DATE	FROM	TO	ODOMETER READING START	ODOMETER READING FINISH	TRIP MILEAGE	TOTAL
					0.0	
					0.0	

NOTE: Mileage reimbursements cannot be requested unless a fleet vehicle was NOT available at the time of the travel (attach documentation from Public Works)

TOTAL MILEAGE 0.0 **$ -**

SUMMARY

COUNTY PURCHASING CARD CHARGES		**982.60**
FLEET VEHICLE USAGE AND OTHER EXPENSES		**520.80**
EMPLOYEE REIMBURSEMENT		
Reimbursable Expenses	-	
Mileage Reimbursement	-	
TOTAL EMPLOYEE REIMBURSEMENT (Voucher Total)		-

TOTAL TRAVEL AND TRANSPORTATION EXPENSE:	**Laserfiche Empower 2015 ESTIMATE**	**$ 1,503.40**
Total Maximum Allowable per attached Board of County Commissioners' Motion		$ -
Amount Over (Under) Amount Approved		$ 1,503.40

CERTIFICATION - This form must be printed and manually signed prior to submittal to the Finance Department.

My signature certifies the amounts requested on this reimbursement form are accurate to the best of my knowledge and belief, and that payment has not been received by me from another source.

Employee also certifies and supervisor confirms that employee holds a valid driver's license and carries all insurance coverage required by law on the vehicle used for this travel, if applicable.

Employee Printed Name

Employee Signature Date

Supervisor Signature Date

Benjamin Cowan's Schedule

Tuesday, January 13, 2015

1:30pm

CC102 Introduction to Quick Fields
Marriott: Grand GH

This presentation introduces Laserfiche Quick Fields, a powerful, flexible capture solution.
In this session, you will learn:
• How to simplify and automate the processing and storage of documents.
• Improves the efficiency of scanner operators.
Alex Matos, Laserfiche Sales

3:00pm

CC103 Hands-On Lab: Getting Started with Quick Fields
Marriott: OC 1-4

Laserfiche Quick Fields is an easy-to-use, automated capture solution.
In this session, you will learn:
• Simple techniques, like batch scanning and information retrieval, to collect and store documents.
• Data entry automation and document naming and filing.
• How to start processing documents using the Quick Fields interface.
Misty Blair, Technical Writer

4:30pm

CC202 Hands-On Lab: Intermediate Quick Fields
Marriott: Platinum 3-4

Quick Fields has many tools to tackle tricky scanning challenges and improve the speed and accuracy of filing. This course will go beyond Quick Fields best practices.
In this session, you will learn:
• New PDF functionality.
• Tips for increasing OCR accuracy.
• Pattern matching.
• Laserfiche Capture Engine.
Colgan Chan, Solutions Engineer

Wednesday, January 14, 2015

9:30am

CC101 Overview of Capture Tools
Sheraton: Park D

Laserfiche offers a variety of tools and methods for gathering the content coming into your organization.
In this session, you will learn:
• How to define your capture requirements.
• To determine which capture tool—such as Scanning, Snapshot, Quick Fields, or Forms—fits your needs.
Zack Domangue, Laserfiche Sales

11:00am

CS102 E-forms: Benefits and Best Practices from a Seasoned Pro
Marriott: Grand AB

Are you and your colleagues tired of chasing down missing information, manually entering data from paper forms into your software systems and hounding approvers to review submitted forms? Join 2013 Tom Wayman Leadership Award winner Adam Galvan Jr., who will share his best practices for rolling out 200 electronic forms across his organization, saving massive amounts of staff time and more than $250,000 in the process.
In this course, you will learn step-by-step how to use Laserfiche Forms to automate HR and AP processes including:
• HR Onboarding
• Accounts Payable Processing
• Travel Requests and Settlements
Adam Galvan, IT Director, Edgewood Independent School District
Armando Ontiveros, Finance and Application Analyst, Edgewood Independent School District

12:00pm

SE010 Lunch, Open Seating Wednesday
Marriott: Platinum 5-6

Enjoy open-seating lunch with your fellow Empower attendees.

1:30pm

LB107 Hands-On Lab: Searching in Laserfiche, Part 1
Marriott: Grand F

(Part 1 of 2.) Find exactly what you're looking for in Laserfiche with its powerful search tools.
In this session, you will learn:
• Which search type will find just what you're looking for.
• How to search based on almost any information about the document you want to find, including text, metadata, and properties.
• How to customize searches to make retrieval easy and efficient.
Cathy Lee, Solutions Engineer

3:00pm

LB151 Hands-On Lab: Searching in Laserfiche, Part 2
Marriott: Grand F

(Part 2 of 2.) Find exactly what you're looking for in Laserfiche with its powerful search tools. This lab goes beyond basic searching to offer tips for using often-overlooked searching tools and options.
In this session, you will learn:
• Refinements to make searches more efficient and effective.
• How to customize quick searches.
• How to improve overall search efficiency to yield faster results.
Cathy Lee, Solutions Engineer

4:30pm

CS104 Rumble in the Jungle Rematch: Quick Fields vs. Workflow vs. Forms
Marriott: Grand AB

Let's get ready to rumble! Last year's entertaining "Smackdown" returns as we battle it out in the ring to discuss common situations you encounter in your workday. When do you use Quick Fields, when do you use Workflow, when do you use Forms – or when are they best together? You be the ref and make the call!

In this session, you will learn:
• How to evaluate solutions for scenarios including expense reporting, travel requests and hiring.
• Easy ways to generate value by creating new applications from products you already own.
• A common methodology to automate new processes across your organization.

Michael Wells, Lead Analyst, Chesterfield County, VA
| Amy Johnson, Deputy Commissioner of the Revenue, Hanover County, VA
Adam Galvan, IT Director, Edgewood Independent School District
Melissa Henley, Director of Marketing Communications, Laserfiche

Thursday, January 15, 2015

9:30am

CS106 Automating Contract and Agenda Management with Laserfiche Forms
Marriott: Grand CD

Contract and agenda management can be two of government organizations' most laborious and paper-intensive processes. Run Smarter Award Winner Gunnison County took an innovative approach to streamlining these processes using Laserfiche Forms, which reduced processing time by more than three days.
In this session, you will learn:
• How to use Laserfiche Forms to initiate and track approvals, resulting in increased transparency and efficiency.
• A suggested process for automating contract management, complete with screenshots of the Forms process modeler.
• Best practices for taking a collaborative approach to solution design.

Mike Lee, IT Director, Gunnison County

11:00am

CC301 Hands-On Lab: Advanced Quick Fields
Marriott: Platinum 1-2

This course will help users with foundational knowledge of Quick Fields get to the next level.
In this session, you will learn:
• To maximize the efficiency, accuracy, and speed of Quick Fields sessions.
• How to configure your sessions to run at maximum speed.
Colgan Chan, Solutions Engineer

1:30pm

BPM116 Hands-On Lab: Getting Started with Workflow
Marriott: Grand E

New to Laserfiche Workflow? This lab will get you started automating your organization's business processes.
In this session, you will learn:
• How to route documents for approval.
• To use Workflow to automatically send email notifications.
Ashley Hutchison, Project Coordinator

3:00pm

BPM206 Hands-On Lab: Intermediate Laserfiche Workflow
Marriott: Grand E

Go beyond the basics of Laserfiche Workflow.
In this session, you will learn:
• Intermediate level Workflow activities, such as Conditional Parallel routing, iterating with For Each activities, and more.
• How to build complex workflows using intermediate Workflow activities.

Nathan Dickson, Solutions Engineer

4:30pm

BPM208 Best Practices in Laserfiche Workflow
Sheraton: Palm W

Take your workflow designs from intermediate to expert with advice from the pros.
In this session, you will learn:
• Tips for creating dynamic workflow processes.
• Tricks to writing airtight starting rules.
• Reporting techniques to monitor processes.
Jason Ku, Software Engineer in Test
Joseph Dearden, Software Engineer in Test

Friday, January 16, 2015

8:00am

BPM304 Advanced Laserfiche Workflow
Marriott: Grand GH

This course is designed for expert Laserfiche Workflow users, and will cover a variety of detailed activities that require careful configuration to yield great benefit to organizations.
In this session, you will learn:
• How to use specific activities, such as Deadlines, Escalations, Replicate Entries, Invoke Workflow, and more.
Flavio Kuperman, Software Engineer

9:30am

CC205 Advanced Laserfiche Metadata
Sheraton: Park D

Familiar with the basics of Laserfiche metadata? This class will take you a step further.
In this session, you will learn:
• Advanced metadata features that help you store, retrieve, and work with information.
• About dynamic fields, field constraints, automated version tracking, tag watermarks, digital signatures, and more.
Brianna Blanchard, Software Test Engineer
Roger Wu, Technical Writer

11:00am

BPM302 Advanced Laserfiche Forms
Sheraton: Palm W

Take your knowledge of Laserfiche Forms to the next level.
In this session, you will learn:
• Best practices for creating and maintaining forms and processes.
• Scripting and rules to customize your forms.
• How to connect forms to Laserfiche Workflow.

Abby Shen, Senior Software Test Engineer
Mary Ma, Software Engineer

1:30pm

BAS139 Process Automation: Manager's Edition
Marriott: Grand GH

Streamline your staff's day-to-day tasks and encourage productivity using Laserfiche's process management tools.
In this session, you will learn:
• Ways to provide custom, inline process direction and information.
• Settings you can use to send automated notifications of pending tasks.
• Steps to removing process bottlenecks to achieve faster completion time.
Kelsey Frost, Sales Engineer

3:00pm

CC206 Designing Sessions for Improved Operator Efficiency
Marriott: Grand GH

This course will teach you how to optimize Laserfiche Quick Fields for scanner operators.
In this session, you will learn:
• How using field constraints and field lookups ensures consistency in your repository.
• To configure operator security and options.
Miruna Babatie, Software Test Engineer