

## **CEA Monthly Reports**

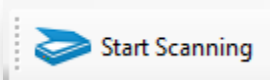
- > D-843 Commissioners Court Report
- > D-360 Monthly Schedule of Travel
- > D-738 Office Conferences

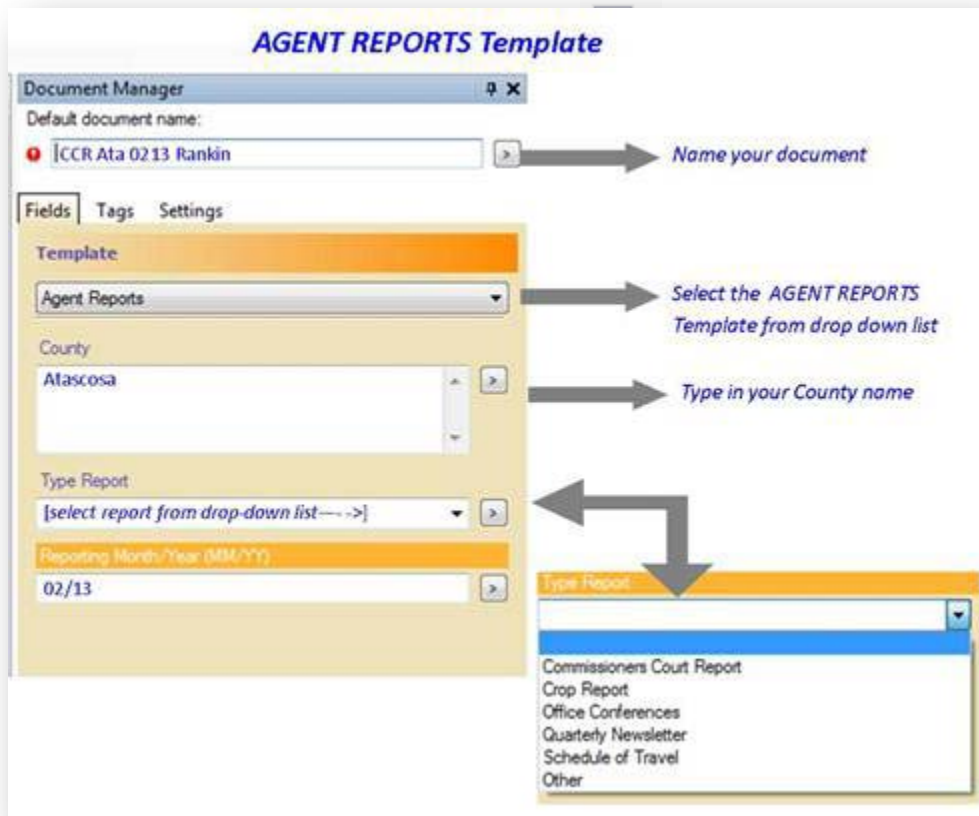
The above listed CEA monthly reports should be submitted via Laserfiche (LF). All county coordinators and designated support staff have been granted access and provided instructions for implementation. If you do not have access, please coordinate with your support staff to submit reports in a timely manner.

Documents stored in LF must be in the appropriate format. There are various methods to achieve this, I have listed 3 options below... use what is best and most efficient for you.

- **Scanning directly into Laserfiche** – assure your scanner is set up for **Basic Scanning**, you may then follow step-by-step instructions on the next page \* to scan your printed documents.
- **Importing PDFs into Laserfiche** – once you set up the defaults, you may simply use the Drag and Drop feature to move PDFs into your LF home folder. Your documents will be converted and imported in the correct format automatically and are ready for submission into our DS12 folder.
- **Laserfiche Snapshot Tool** – once configured, you will be able to open the document in its native format the select Print>LF Snapshot8, this will pop up a login window the first time you use Snapshot each day. You can change the name of the document and add a template (metadata) and “Print”. Your documents will be converted and imported in the correct format and placed in your LF home folder where you can easily drag/drop into our DS12 folder for submission.

## \*Scanning into Laserfiche.↷

1. Log in to LF
2. Open your Home folder, located under  
Work in Progress - Unit Folders - County Offices - ##### (your county unit number, see list below)
  - Reports must ALWAYS be scanned directly into your home folder, then dragged/dropped into the district folder - **Work in Progress - DS12** - as separate files for check-in and DEA review.
3. Select File / Scan (scanner window opens)
4. Place document on scanner
5. Select File/Start Scanning (or use icon from toolbar----- > 
6. Name the document using standard format (under Document Name – top right of screen)
7. Attach Template - Select the “Agent Reports” template from the list, fill in all fields appropriately for each report (see sample below).



**AGENT REPORTS Template**

Document Manager

Default document name:  
[CCR Ata 0213 Rankin] > *Name your document*

Fields | Tags | Settings

Template  
Agent Reports > *Select the AGENT REPORTS Template from drop down list*

County  
Atascosa > *Type in your County name*

Type Report  
[select report from drop-down list--->] > *Type Report*

Reporting Month/Year (MM/YY)  
02/13 >

Type Report  
Commissioners Court Report  
Crop Report  
Office Conferences  
Quarterly Newsletter  
Schedule of Travel  
Other

8. Select Action/Store Immediately (icon ---- >
9. Continue scanning all docs or EXIT
10. Press F5 to refresh, your scanned documents will now be in your home folder
11. Cut & paste into the Work in Progress - DS12 folder  
(located under Work in Progress – Unit Folders – DS12)
12. All documents will be checked in by district office for DEA monthly review.

13. After DEA review, district office will store and retain reports in LF under the Administrative Records section in the following folders:

- 1 . 1 . 16 . 13 = Commissioners Court Reports and Schedule of Travel  
*1.1 General\1.1.16 Reports, Studies & Surveys\1.1.16.13 Monthly Agent Reports*
- 1 . 1 . 25 . 5 = Office Conferences  
*1.1 General\1.1.25 Staff Meeting Minutes/Notes*
- 1 . 3 . 4 = Newsletters  
*1.3 Publications\1.3.4 Unit Publications and Newsletters*

## Standard Name Format:

For consistency in LF filing, documents will always follow standard name formats to be provided by district office manager.

- Commissioners Court Report – D843 (one per month per agent)
  - FILE NAME: CCR County MMY LName
  - EXAMPLE: CCR Ata 0214 Rankin  
(for Feb 2014 court report for Agent Rankin)
- Schedule of Travel – D360 (one per month per agent)
  - FILE NAME: TRV County MMY LName
  - EXAMPLE: TRV Ata 0214 Rankin  
(for Feb 2014 schedule of travel for Agent Rankin)
- Office Conferences – D738 (submit ONE document for all conferences held for the reporting month)
  - FILE NAME: OC County MMY
  - EXAMPLE: OC Ata 0214  
(for ALL Feb 2014 office conferences in Atascosa County)
- Quarterly Newsletters - Cameron & Hidalgo Counties only
  - FILE NAME: NL #Qtr County
  - EXAMPLE: NL 1Qtr Cam (for Cameron County's 1st Quarter newsletter)

## District 12 County Codes & Abbreviations:

0013 Ata	0163 Frio	0283 Las	0479 Web
0047 Brk	0215 Hid	0297 LO	0489 Wil
0061 Cam	0247 JH	0311 McM	0505 Zap
0127 Dim	0249 JW	0323 Mav	0507 Zav
0131 Duv	0273 Kle	0427 Str	DS12 District Office

## For help with scanner setup or login problems:

- Contact FirstCall at 1-866-996-2056 or <http://first-call.tamu.edu> to submit a help ticket.
- Document Management System (Laserfiche) Resources located at:  
<http://aglfdocs.tamu.edu/resources/>