

TYPICAL BUSINESS PROCESSES

| Jessica Bruce
SOLUTIONS LEAD

| Tammy Preston
CUSTOMER SUCCESS MGR

AUTOMATING

Business Processes

Topics for today's presentation:

TREX

TRANSCRIPT
REQUEST

DOCUMENT
UPLOAD

INVOICE
APPROVAL

OPEN
RECORDS
REQUEST

POTLUCK



TREx

Automation Process

Understanding the

TREx Process

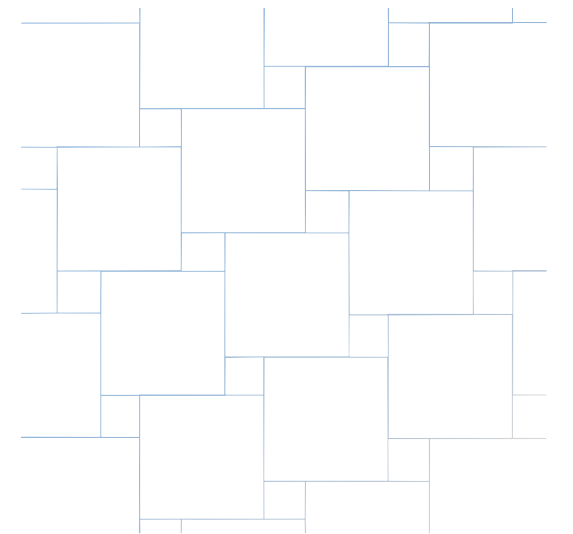
WHAT IS IT?

- Exchange of Student Records
- Mandated by Legislature
- Online process



MANUAL

- Lookup Student
- Gather Documents
- Sort
- Scan
- Upload
- Hours



MANUAL

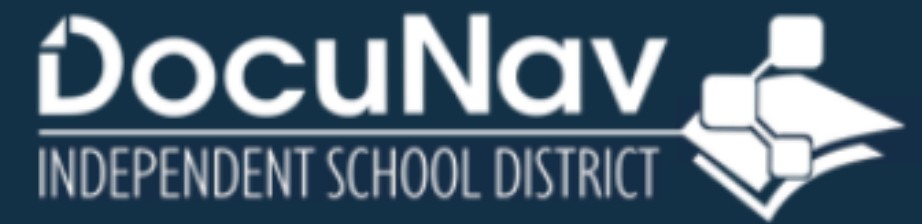
- Lookup Student
- Gather Documents
- Sort
- Scan
- Upload
- Hours

AUTOMATED

- Complete Form
- Upload
- Minutes

Student TRES Request

DocuNav ISD • 800-353-2320 • www.docunav.com



Submitter Information

Name *

Emmett Brown-LF Admin

E-mail

demo3@docunav.com

Department

Human Resources

Student Information

Student *

Campus *

Campus ID *

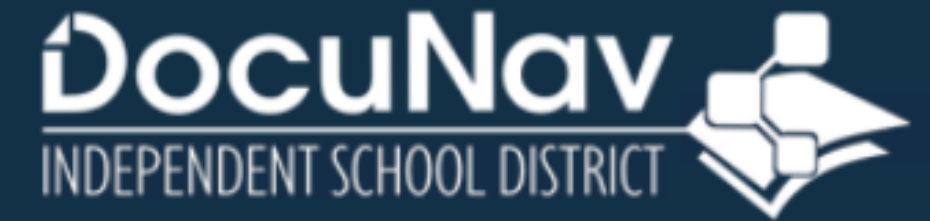
Grade *

Student ID *

Submit

Student TRES Request

DocuNav ISD • 800-353-2320 • www.docunav.com



Submitter Information

Name*

Emmett Brown-LF Admin

E-mail

demo3@docunav.com

Department

Human Resources

Student Information

Student*

Campus*

Campus ID*

Grade*

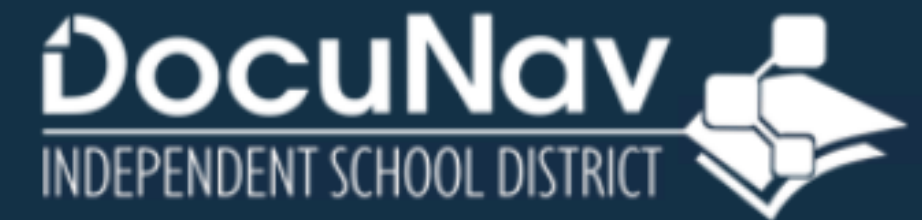
Student ID*

Adams, John (111111)
Adams, Kyle (777777)
Adams, Vanessa (666666)
Johnson, Brian (989898)
Martinez, Jesus (987654)
Miller, Susan (323232)
Patel, Michael (555555)
Rosenbaum, Jonas (876543)
Sanders, Mary (222222)
Smith, Xavier (909090)
Valor, Michael (888888)

Submit

Student TRES Request

DocuNav ISD • 800-353-2320 • www.docunav.com



Submitter Information

Name*

Emmett Brown-LF Admin

E-mail

demo3@docunav.com

Department

Human Resources

Student Information

Student*

Smith

Smith, Xavier (909090)

Campus*

Campus ID*

Grade*

Student ID*

Submit

Student TRES Request

DocuNav ISD • 800-353-2320 • www.docunav.com



Submitter Information

Name *

Emmett Brown-LF Admin

E-mail

demo3@docunav.com

Department

Human Resources

Student Information

Student *

Smith, Xavier (909090)

Campus *

North High School

Campus ID *

001

Grade *

11

Student ID *

909090

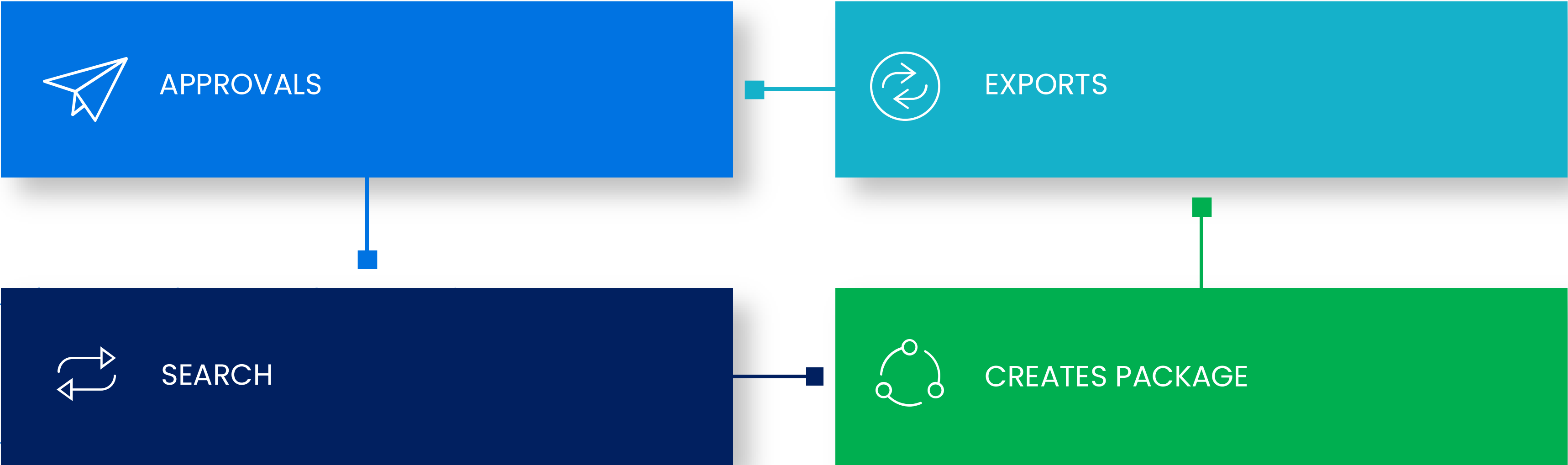
Documents Found

Template	Document Type	Document Description	Document Date
Academic-Student Records	Records	Transcript	06/01/2021

Submit

TREx Process

Workflow Automation



Questions?

TREx PROCESS



TRANSCRIPT REQUEST

Automation Process

Understanding the Transcript

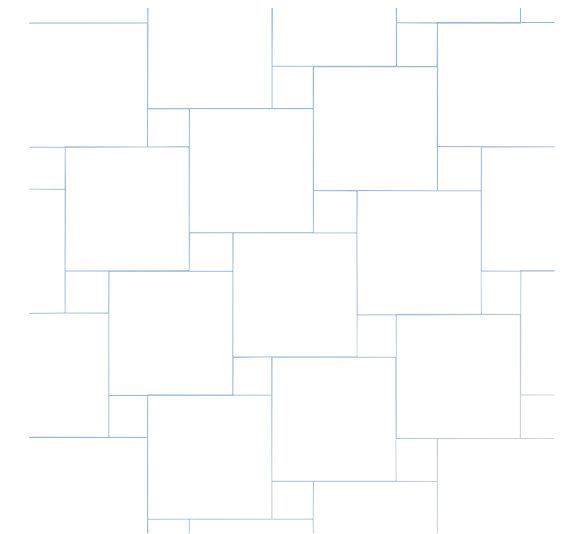
WHAT IS IT?

- Permanent
- Schools
- Employers
- Grades and Credentials



MANUAL

- Contact School
- Passed Around
- Fill out form
- Wait
- Return
- Days or Weeks



MANUAL

- Contact School
- Passed Around
- Fill out form
- Wait
- Return
- Days or Weeks

AUTOMATED

- Complete Form
- Approval
- Receive
- Hours

Transcript Request

www.DocuNavISD.com • 8501 Wade Blvd Suite 1440, Frisco, TX 75034 • (800) 353-2320



Do you know the Student's ID you are requesting a transcript for? *

☐ Yes ☐ No

Submit

Transcript Request

www.DocuNavISD.com • 8501 Wade Blvd Suite 1440, Frisco, TX 75034 • (800) 353-2320



Do you know the Student's ID you are requesting a transcript for? *

☒ Yes ☐ No

Student Information

Student ID *

Date of Birth *

MM/DD/YYYY



First Name *

Last Name *

Transcript Request

www.DocuNavISD.com • 8501 Wade Blvd Suite 1440, Frisco, TX 75034 • (800) 353-2320



Do you know the Student's ID you are requesting a transcript for? *

☐ Yes ☒ No

Student Information

Date of Birth *

MM/DD/YYYY 

First Name *

Last Name *

Graduation/Withdrawal Year *

2020 

Last Campus Attended *

Campus Type

Campus ID

Requestor's Information

First Name *

Last Name *

Relationship to Student *

E-mail *

Phone # *

Preferred Method of
Communication *

☒ Email ☐ Phone

Driver's License *

Drag and drop up to **1**
files here to upload or

Attach Driver's
License

pdf,jpg,jpeg,bmp,png

Transcript Request Information

Requested Transcript	Quantity *	Delivery Method
	1	

+ Add Transcript Request

Requested Transcript

Official

Copy

Quantity *

1

Delivery Method

Email

Mail

In-Person Pickup

Delivery Method	Address	
Mail	Street Address	
	Address Line 2	
	City	State/Province/Region
	Postal/Zip Code	Country

Transcript Request

Process Automation



Questions?

TRANSCRIPT



DOCUMENT UPLOAD

———— Process Automation ————

01

Submit the Form



02

File for Retention



Document Upload

WHAT

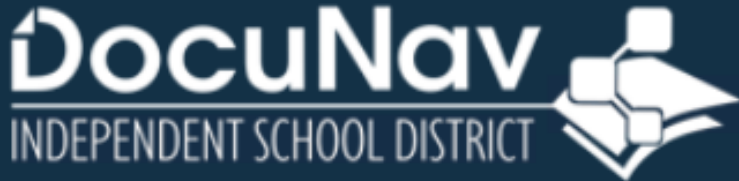
Forms Process

WHY

Ease of Use

Student Document Upload

Student Records • 800-353-2320 • www.docunav.com



Submitter Information

Name*	E-mail	Department
Emmett Brown-LF Admin	demo3@docunav.com	Human Resources

Student	Student ID	First Name	Last Name

Document(s)

Document Type*	File Upload*
	Drag and drop up to 1 files here to upload or Choose File
Document Description*	
Document Date*	
09/01/2023	

[+ Add Document](#)

Submit

Student Document Upload

Student Records • 800-353-2320 • www.docunav.com



Submitter Information

Name*

Emmett Brown-LF Admin

E-mail

demo3@docunav.com

Department

Human Resources

Student

Adams, John (111111)
Adams, Kyle (777777)
Adams, Vanessa (666666)
Johnson, Brian (989898)
Martinez, Jesus (987654)
Miller, Susan (323232)
Patel, Michael (555555)
Rosenbaum, Jonas (876543)
Sanders, Mary (222222)
Smith, Xavier (909090)
Valor, Michael (888888)

Student ID

First Name

Last Name

File Upload*

Drag and drop up to 1 files here to upload or

Choose File

Student Document Upload

Student Records • 800-353-2320 • www.docunav.com



Submitter Information

Name*

Emmett Brown-LF Admin

E-mail

demo3@docunav.com

Department

Human Resources

Student

Va

Adams, **V**anessa (666666)

Valor, Michael (888888)

Student ID

First Name

Last Name

Document(s)

Student Document Upload

Student Records • 800-353-2320 • www.docunav.com



Submitter Information

Name*

Emmett Brown-LF Admin

E-mail

demo3@docunav.com

Department

Human Resources

Student

Valor, Michael (888888)

Student ID

888888

First Name

Michael

Last Name

Valor

Document(s)

Document Type *

Document Description *

Document Date *

File Upload *

Drag and drop up to 1 files here to upload or

Choose File

[+ Add Document](#)

Document Type*

Back Scanning

Campus

Discipline

Legal

Other

Records

Student Information

Testing

Document Type*

Campus

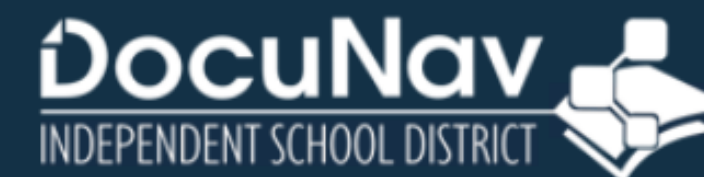
Document Description*

DRA Teacher Observation Guide

Math Add Vantage

Student Document Upload

Student Records • 800-353-2320 • www.docunav.com



Submitter Information

Name*

Emmett Brown-LF Admin

E-mail

demo3@docunav.com

Department

Human Resources

Student

Johnson, Brian (989898)

Student ID

989898

First Name

Brian

Last Name

Johnson

Document(s)

Document Type*

Campus

Document Description*

Math Add Vantage

Document Date*

09/01/2023



File Upload*

File limit has been reached.

Files (1 uploaded)



SAMPLE 2.tif

152.92KB [Remove](#)

[+ Add Document](#)

Submit

DOCUMENT UPLOAD

Processing



Questions?

DOCUMENT UPLOAD



INVOICE APPROVAL

————— Process Automation —————

Invoice Approval-Vendor

Accounts Payable • 800-353-2320 • www.docunav.com



Vendor Name *

Vendor ID

Contact Email *

**Before you can submit an invoice to DocuNav ISD,
you must first choose your Vendor Name from the dropdown
and then enter the matching Vendor ID.**

Submit

01

Submission



02

Staff Approval



Invoice Approval

WHAT

Forms Process

WHY

Track & Report

Invoice Approval-Vendor

Accounts Payable • 800-353-2320 • www.docunav.com



Vendor Name*

DocuNav Solutions

Laserfiche

Office Depot

Staples

Sysco

Walmart

Vendor ID

Contact Email*

Submit an invoice to DocuNav ISD,
your Vendor Name from the dropdown
and the matching Vendor ID.

Submit

Invoice Approval-Vendor

Accounts Payable • 800-353-2320 • www.docunav.com



Vendor Name*

DocuNav Solutions ▼

Vendor ID

100001

Contact Email*

Invoice(s)

Purchase Order #

Invoice #*

Invoice Date*

MM/DD/YYYY 

Invoice Amount*

\$

File Upload*

Drag and drop up to 1 files here to upload or

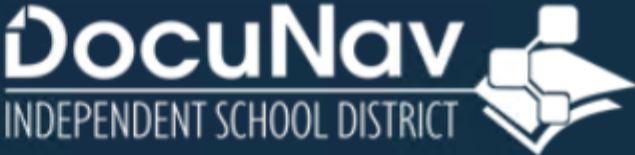
Choose File

[+ Add Invoice](#)

Submit

Invoice Approval-Vendor

Accounts Payable • 800-353-2320 • www.docunav.com



Vendor Name *

DocuNav Solutions

Vendor ID

100001

Contact Email *

vendor@docunav.com

Invoice(s)

Purchase Order #

PO-000001

Invoice # *

1234

Invoice Date *

09/14/2023

Invoice Amount *

\$ 125.00

File Upload *

File limit has been reached.

Files (1 uploaded)



SAMPLE 5.pdf

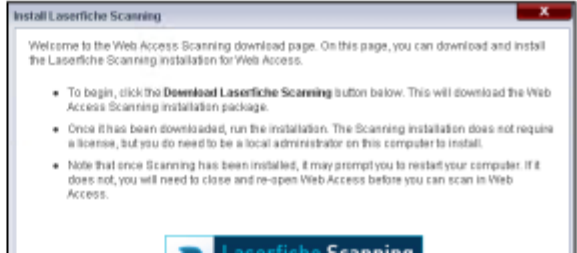


226.05KB

[Remove](#)

Scanning into Laserfiche

There are different ways to get documents into Laserfiche. One way is to use Laserfiche Scanning to convert paper documents into electronic images and store those images in Laserfiche. Scanning is therefore a critical component of most Laserfiche installations, and it is important to know how to use it in order to make your document management process as efficient and useful as possible. Scanning provides a wide variety of options for processing documents as they are scanned; you can tailor your scanning procedure to meet your organization's needs. Using these options can make your documents easier to read, categorize, and locate in your repository. Scanning into a repository is a four-step process: configuration, scanning, quality control, and storage. It is useful to consider these four steps when planning your scanning procedure.



INVOICE APPROVAL – VENDOR

Processing



Invoice Approval - Staff

Accounts Payable • 800-353-2320 • www.docunav.com



Submitter Information

Name*	E-mail	Department
Emmett Brown-LF Admin	demo3@docunav.com	Human Resources

Invoice(s)

Purchase Order #	File Upload*
	Drag and drop up to 1 files here to upload or Choose File
Invoice #*	
Invoice Date*	
MM/DD/YYYY	
Invoice Amount*	
\$	
Account*	
Vendor ID	
Vendor Name	

[+ Add Invoice](#)

Purchase Order #

PO-000001
PO-000002
PO-000003

Value is required



Purchase Order #

PO-000001

Invoice #*

Invoice Date*

MM/DD/YYYY 

Invoice Amount*

\$

Account*

Vendor ID

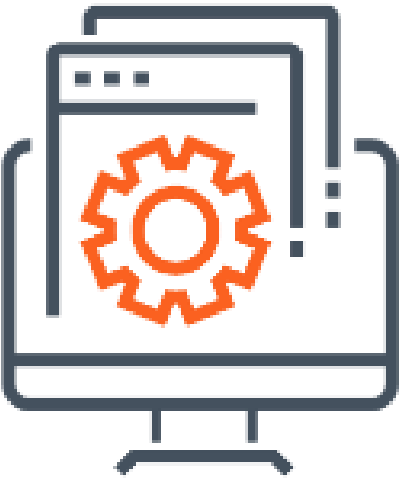
100001

Vendor Name

DocuNav Solutions

INVOICE APPROVAL – STAFF

Processing



Questions?

INVOICE APPROVAL



OPEN RECORD REQUEST

Process Automation

01

Submission



02

Staff Approval



Open Records Request

WHAT

Forms Process

WHY

Documentation

Open Records Request

City Secretary's Office ♣ 800-353-2320 ♣ docunav.com



Requestor Information

First Name *

Last Name *

E-mail *

Telephone

Address

Please include Box & Suite Numbers

City

State

Zip Code

Request

In compliance with the Public Information Act, contained in Chapter 552 of the Texas Government Code, please provide the records described below. To avoid any delay, please be specific regarding Date(s), Time Period(s), and Document name(s).

Department Requesting Information From*

Check ALL That Apply*

- ☐ I request documents be EMAILED
- ☐ I request to VIEW documents
- ☐ I request PAPER copies
- ☐ I request a CD

Do you want an Estimated cost for this request?*

Request*

Acceptance & Digital Signature

By submitting this form I attest that:

- All information in this form is accurate
- I am the person listed in the "Requestor Information" section
- I accept that typing my name below and checking the "Accept" box constitutes my digital signature

Submitted Date *

Date will be captured
on form submission

Requestor's Full Name *

Accept *

☐ Accept

OPEN RECORDS REQUEST

Processing



Questions?

OPEN RECORDS REQUEST



POTLUCK

Process Automation

01 Submission



02 Report



Potluck Submission

WHAT

Forms Process

WHY

Fun & Easy



Event Form

Employee Information

Employee ID *

First Name *

Last Name *

Campus/Department *

Create Event

Date of Event: *



Event Name: *

Item Needed *

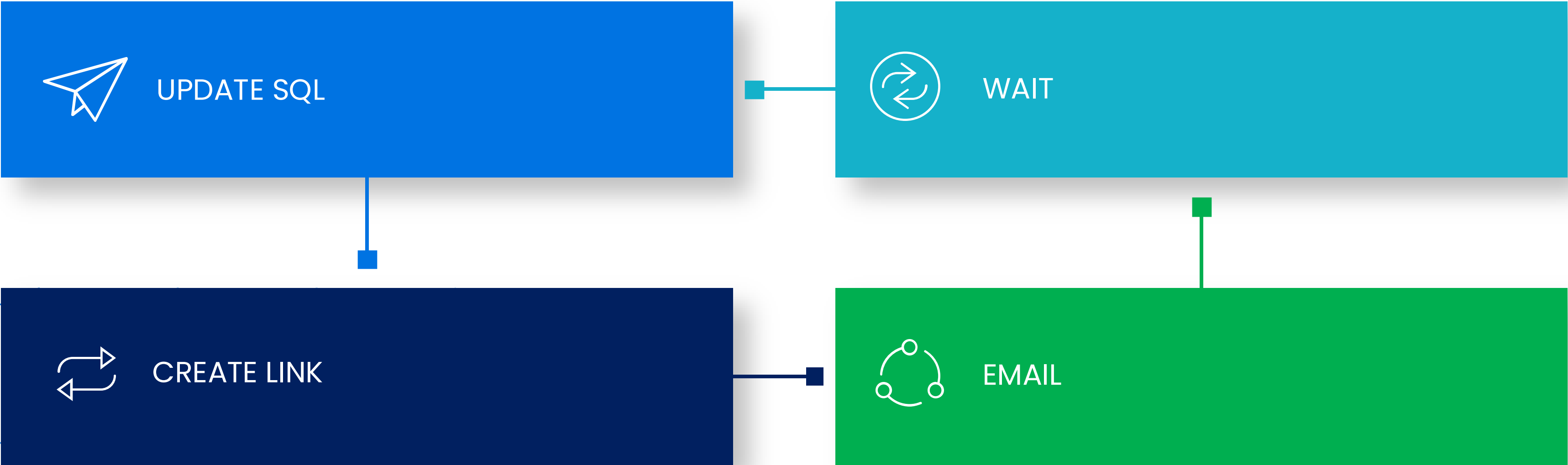
Quantity *

[Add Another Item](#)

Submit

POTLUCK FORM - CREATE

Processing





Event Form

Employee Information

Employee ID *

First Name *

Last Name *

Campus/Department *

Event Sign Ups

Please select from the available options, or you choose Other to add your own.

Available Options: *

Quantity Needed *

Quantity Bringing *

[Choose Another Item](#)

Submit



Event Form

Employee Information

Employee ID *

First Name *

Last Name *

Campus/Department *

Event Sign Ups

Please select from the available options, or you choose Other to add your own.

Available Options: *

▼

Chips

Drinks

Other

Submit

Quantity Needed *

Quantity Bringing *



Event Form

Employee Information

Employee ID *

First Name *

Last Name *

Campus/Department *

Event Sign Ups

Please select from the available options, or you choose Other to add your own.

Available Options: *

Quantity Needed *

Quantity Bringing *

Other *

X

X

[Choose Another Item](#)

Submit

POTLUCK FORM – SIGNUP

Processing



UPDATE SQL



EMAIL



[illegible]



Event Form

Employee Information

Employee ID *

First Name *

Last Name *

Campus/Department *

Event Sign Ups

Item Bringing *

Quantity Bringing *

[Add Another Item](#)

Submit

Questions?

POTLUCK FORM

Questions?

THANK YOU!

