Creating Personnel Files in Laserfiche
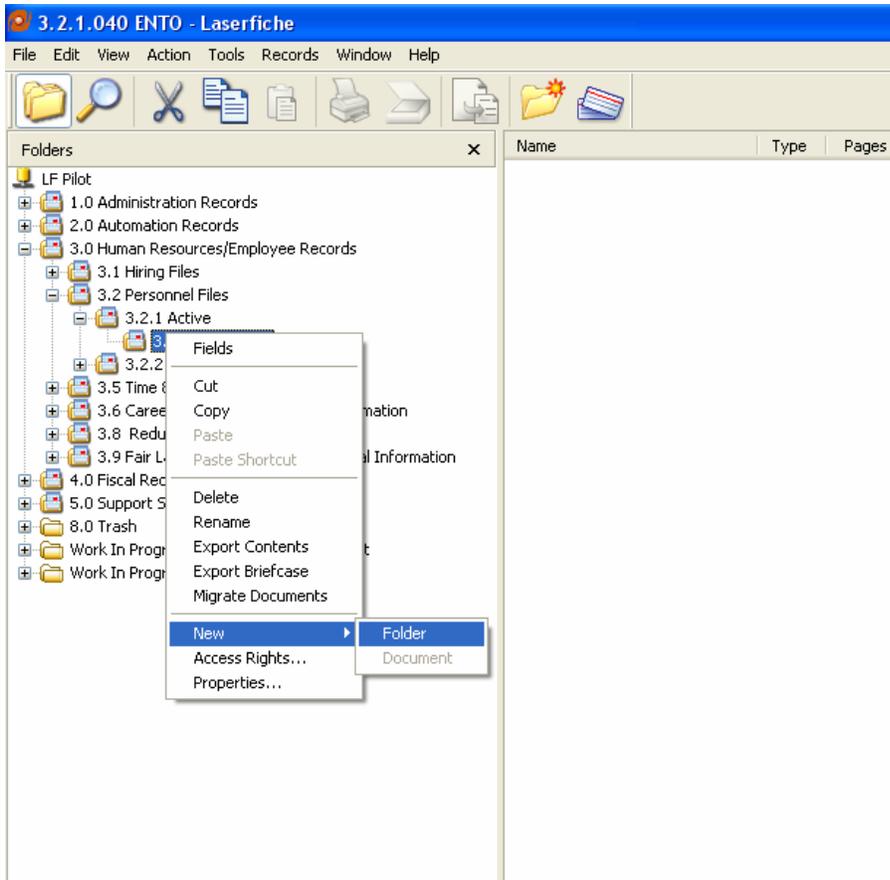
The creating of folders for the Unit Personnel Files in Laserfiche for units has been automated.

First go to Section 3, Human Resources./Employee Records, click on 3.2.1, then on the folder with the unit name where you want to create the Personnel File. Now right click on the unit name folder in the personnel File section, then select "New" and then "Folder" as shown below.
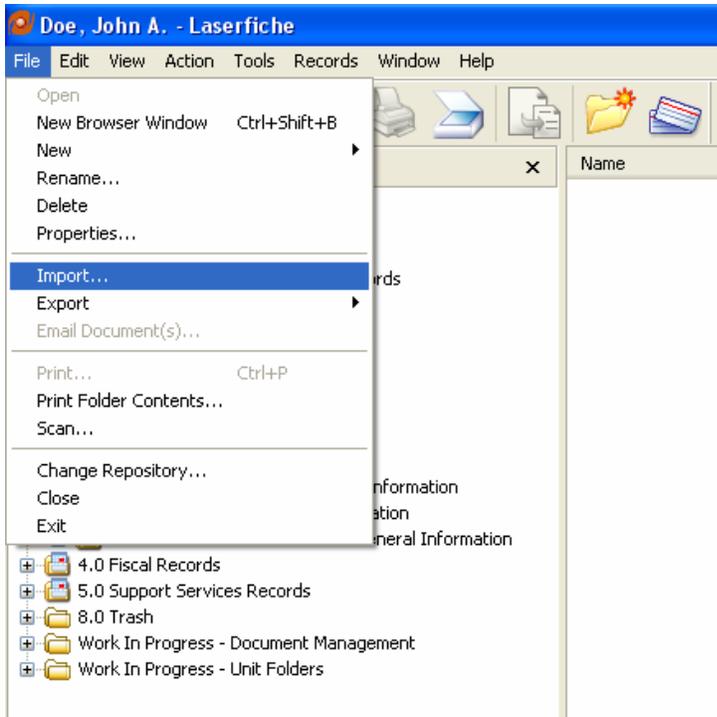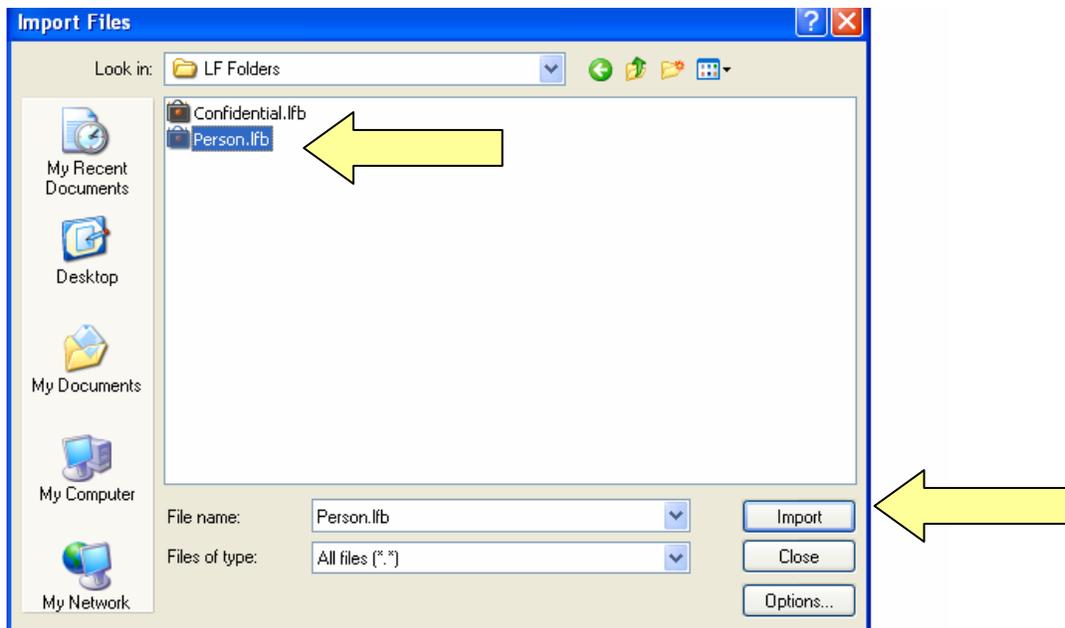
When this appears on the right side of the screen, rename the folder to the employee's name – Last Name, First Name and MI.
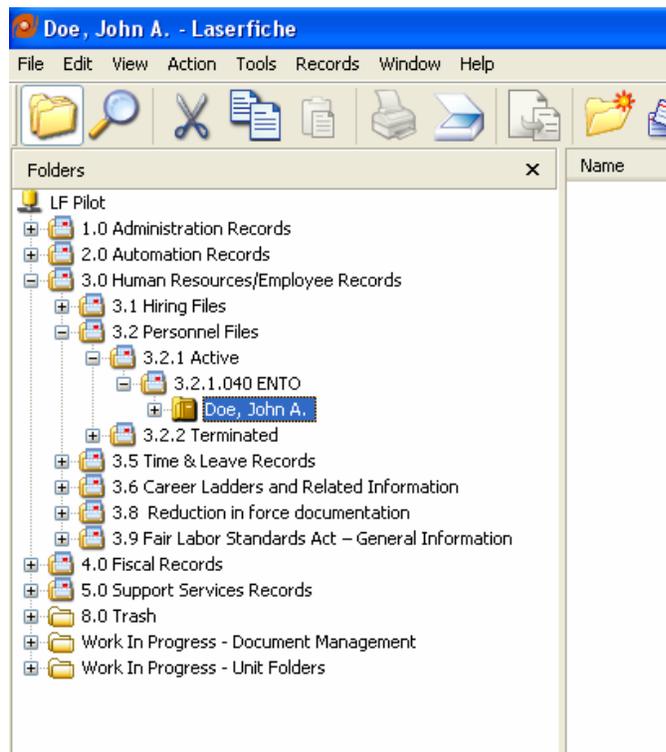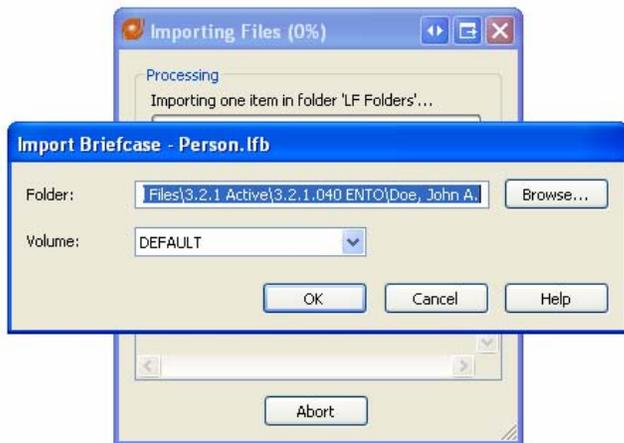

Now go back to the left side of the screen and click on the folder to highlight it.

Now go to "File" in the upper left corner, then click on "Import"

When the "Import Files" screen pops up, select the folder in which you have saved the Person.lfb "Briefcase" folder. And click on the folder, chen click on "Import"

When this screen pops up. Click on "OK" and the folders inside your employee's personnel file will be created. As shown below.

In the same manner you can create for "Confidential" part of each employee's files as needed. The only differences are to import from the file titled "Confidential" and when naming it, precede the employee's last name with the word "[Confidential]" (with the square brackets). By naming it in this manner the Confidential section of all of the unit's personnel files will be listed first and the other portion of the personnel file will be listed second thereby creating a separation of files and enabling control of access at different levels..