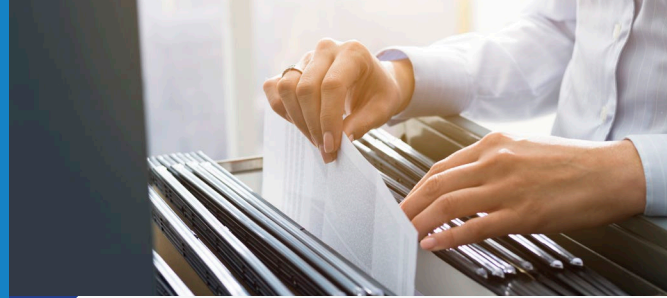


Records Management Design

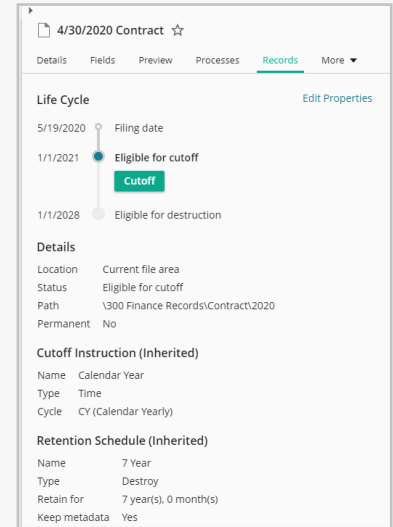


About

Launch your Laserfiche Records Management deployment with the help of CDI. Let our experienced team lead you through the process of organizing, classifying and automating your records. With our plan, your users will be able to effortlessly tag records and watch them automatically enter retention. Laserfiche will perform cutoffs & keep you informed of upcoming dispositions. It's time to get organized and keep it that way!

Our Process

- Initial Assessment & Recommendation
- Project Management
- Metadata and Folder Structure Discovery
- Cutoff Instructions Definitions
- Record Series Definitions
- Access Rights Design
- Folder Structure Design and RM Classifications
- Assign RM classifications to all folders
- Automate Cutoffs
- Automate Disposition Reports
- Documentation & Change Management
- User Acceptance Testing
- Training



Your Benefits

- ✓ Deploy Record Retention with an Experienced Subject Matter Expert
- ✓ Design Departmental Indexing with a Certified Municipal Clerk
- ✓ Automate Records Classification & Cutoff Processes
- ✓ Create a Unified, Standardized Naming Convention
- ✓ Receive Standardized Disposition Reporting
- ✓ Launch Departmental Approval Processes for Destruction
- ✓ Spend Less Time Fulfilling Records Requests