



## EDRMS & FilePlan - Background Checklist

| System setup            |  |
|-------------------------|--|
| Software & version      |  |
| Browser version support |  |
| Date of installation    |  |
| Service packs, patches  |  |

  

| Available Documentation  |  |
|--|--|
| Schema(s)<br><i>electronic / paper</i>                         |  |
| Documentation<br><i>generic / local<br/>electronic / paper</i> |  |

  

| Local Customisation |  |
|---------------------|--|
| Bespoke levels      |  |
| Bespoke fields      |  |
| Other customisation |  |

| <b>Export / Import facilities</b>  |  |
|--|--|
| <b>Available formats (metadata)</b><br><i>XML / CSV / TSV / proprietary</i>                  |  |
| <b>Available methods</b><br><i>archival / disposal / full / part / bulk / batch / manual</i> |  |
| <b>Levels covered</b><br><i>Classes, Folders, Sub-Folders, Parts, Records, Components</i>    |  |
| <b>Objects / documents covered</b><br><i>draft / finalized / declared / corporate value</i>  |  |
| <b>Custom fields covered</b>   |  |
| <b>user profiles</b><br><i>access / security</i>   |  |
| <b>role definitions</b><br><i>functional rights / privileges</i>                             |  |
| <b>disposal schedules</b>  |  |
| <b>audit trail data</b>  |  |
| <b>function-related data</b>   |  |
| <b>workflow definitions</b>  |  |

| <b>Known issues</b>  |  |
|--|--|
| <b>corrupt data</b>  |  |
| <b>missing data</b><br><i>placeholders</i>                           |  |
| <b>duplicated data</b><br><i>links / pointers / aliases / copies</i> |  |
| <b>special file types</b>  |  |
| <b>software bugs</b>   |  |