



EDRMS & FilePlan - Background Checklist

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

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

Local Customisation	
Bespoke levels	
Bespoke fields	
Other customisation	

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

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