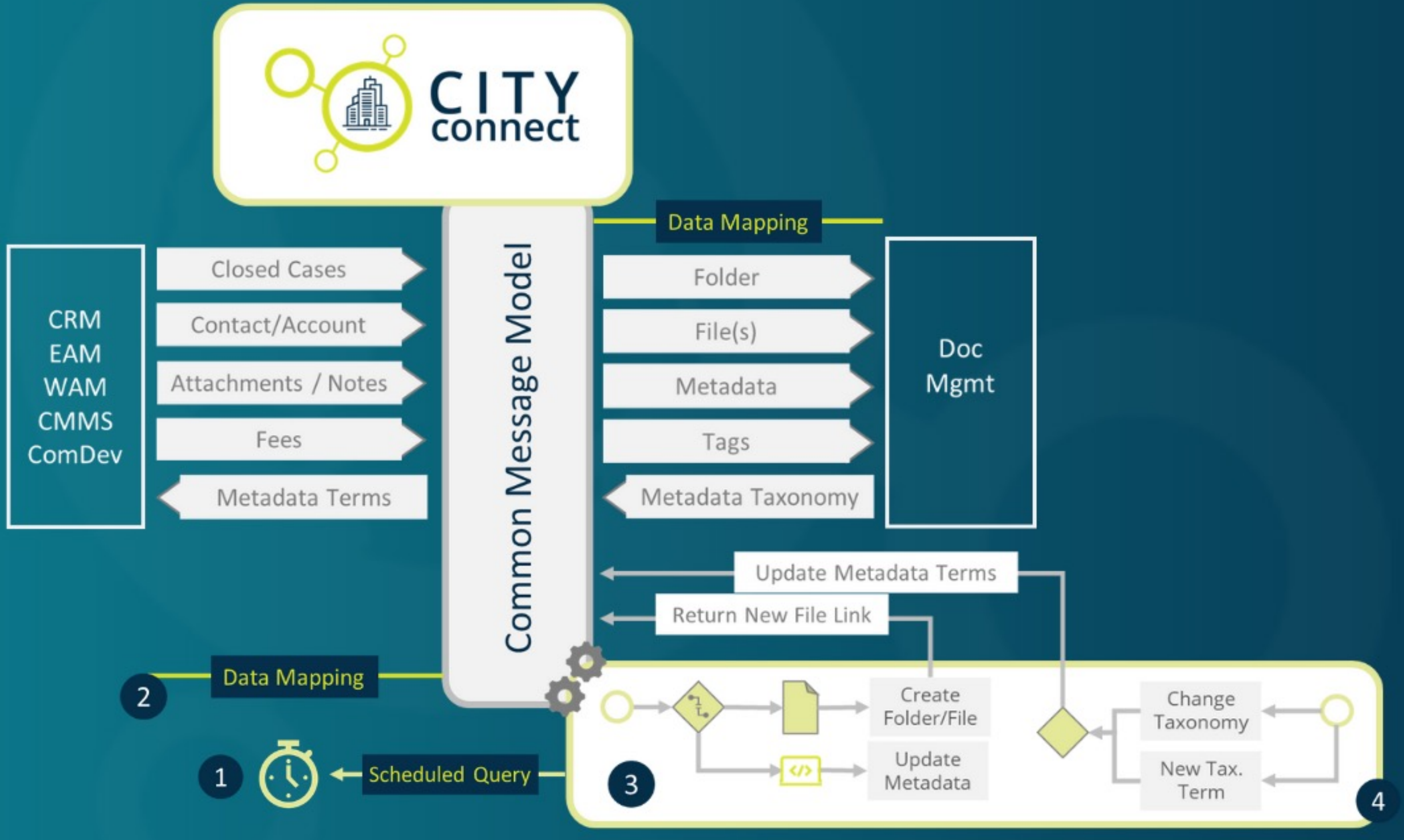
Document Retention Automation

Synchronize documentation and approval status from your work management or permitting solution to your document management system.



1. The Automation performs a Scheduled Query against the case or service request data object in your CRM, EAM/WAM/CMMS or Community Development systems.

2. Closed cases, contacts, attachments and comments, and fees associated to the case are mapped to the Common Message Model.

3. The message is first processed to create the relevant folder and file structure in the document management system. Attachments and Notes or comments are stored in standard subfolders, as well as contact or account records and associated fees. The top-level case folder id is tagged to the case to note the lookup link for information in the document management system. As each folder or file is created associated metadata is applied from the formal metadata taxonomy, and optional “social” tags or keywords can be applied to folders and files. Enterprise search works best on a formally-defined taxonomy, while informal keywords can be used to group documents.

4. Any changes to formal taxonomy in the document management system will update the metadata terms available in your CRM, EAM/WAM/CMMS, or Community Development systems.