GRANICUS

3 Tips in 15 Minutes

Move Your Records Storage and Tracking out of Spreadsheets and Email
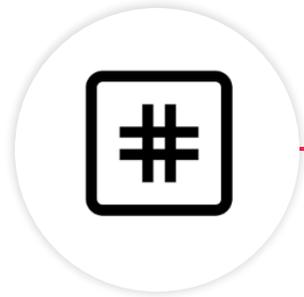
Today's Speakers

Nikki Weaver

Marketing Specialist
Granicus

Cindi L. Mansell CRM, MMC

Master Municipal
Clerk & Records and
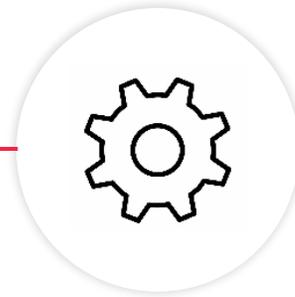Information Manager

Housekeeping

govCommunity
Register at https://community.granicus.com/.

Questions
Questions will be answered at the end. You can submit them at any time through the Q&A icon in the bottom toolbar

Tech Issues
Troubleshoot using Audio Settings in the bottom toolbar or email us at: **info@granicus.com**

Presentation
The slide deck & recording will be sent in a follow-up email.

Q&A

Spreadsheets only work in smaller settings.

- **Users must manually enter all steps** taken and there is no backup audit log.

- **They don't send out reminders**, so important task dates & deadlines can be missed.

- **Lack of follow-up** can lead to liability, potential litigation, or appeals.

Email should never be used to store or track records.

- **Used to be considered conversational**, but more people are using it incorrectly for records storage.

- **Only specific individuals have access** to email; difficult to search for records and to locate for eDiscovery.

- **Company retention and employee turnover** leaves records storage in email vulnerable for deletion or mismanagement.

Software assists an entity in overall tracking and fulfillment of records requests.

- **Monitors deadlines** and time commitments, including workflow reminders.

- **Can issue invoices and receive payments** and provide overall dashboard data and ROI analytics surrounding your FOIA process.

- **Enables use of AI** for similar responses or response categorization or routing.

- **The public can be notified** their information is available and access the information without involving staff.

Why a FOIA software solution and not a Records Management System (RMS)?

An RMS stores a document for its entire lifecycle; why retain information and responses that are no longer legally required to be kept.
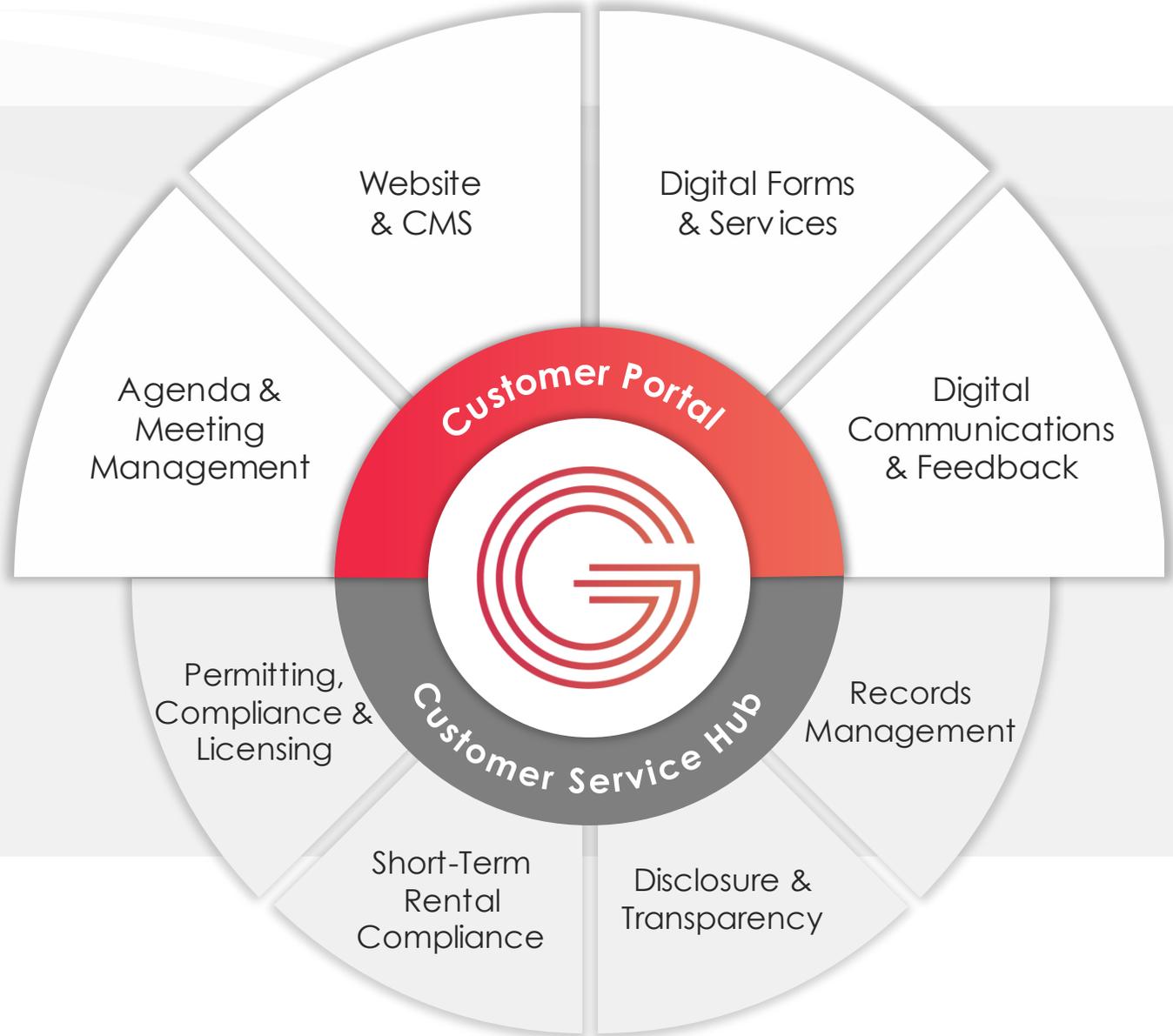
VS

A FOIA system would most likely have that same information uploaded but with redactions to make the document public.

An RMS may have protected, private, or confidential information stored in them.

VS

A FOIA/CRM system would only allow access to what is put in there for the public to access (i.e. public and transparent).

Granicus **Civic Engagement Platform**

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Granicus Experience Group: Digital Agency and Consulting Services

Professional Services | Best Practice Sharing | 24/7 Support | Government Grade Security

Questions?

Thank You

Marketing@granicus.com