

Release Management Client Roundtable

February 23, 2017
Grand Rapids, MI

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Introductions and Recap

Introductions

You Asked For:

- Videos
- Help with Retention and Purging Records
- Hands-On Lab—You on Your System as We Share Features

What's Coming Next?

What's Coming Next?

- Vault Manager Notifications
- Automated Retention Assistance
- Image Import
- eDOC Powered eSigning
- Image Clean-Up

Taking It To Task: Best Practices

Data Integrity (Bring your laptop if you'd like to follow along on your system!)

- Vault manager
- File Sizes
- Missing Indexes
- Receipts Tables
- Imaging Due Diligence

Lunch Provided by CU*Answers

Group Discussion and Open Forum

Group Discussion

- Release Management Report Card (What's Our Grade?)
- Are DVDs the new Microfiche? When? What comes next?
- How are you leveraging mobile transactions with members today?
Safe signing rooms on **It's Me 247** and My Virtual StrongBox
Document Exchange
- Open Forum

**Register
Today!**

<https://cuanswers.zoom.us/meeting/register/e039d16166fa55877c24e00bf0acd2b8>

This is an in-person event, however, a web conference has been arranged to include participants that are unable to travel. Please register whether you plan to attend in person or via web. After registering, you will receive a confirmation email containing information about joining the web conference.