

# Using Digital Document Management to Better Meet e-Discovery Requirements



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- How do the amended Federal Rules of Civil Procedure affect me?
- What steps can I take to prepare for litigation?
- How do I develop an e-discovery response plan?
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# Using Digital Document Management to Better Meet e-Discovery Requirements

A Laserfiche® Executive Focus White Paper

## Introduction

At one time or another, every organization faces litigation, and when it does, your records management program will be significantly tested. According to a recent study conducted by law firm Fulbright & Jaworski, LLP, companies with at least \$1 billion in annual revenue are engaged in an average of 147 lawsuits simultaneously, while companies with annual revenues under \$1 billion juggle an average of 37 lawsuits at a time. On top of that, nearly one-third of firms surveyed spent more than 2% of gross revenues on legal expenses, while 10% spent more than 5%.

While companies in the healthcare, energy and technology industries top the list in the number of lawsuits, organizations in other fields aren't immune—and many are completely unprepared. Operating in today's litigious environment poses a major test to any organization's electronic records management system. Yet a recent Business Performance Management Forum and AXS-One Inc. study found that **36.4% of senior executives surveyed have no technologies or plans in place to manage a legal discovery order involving electronic records. Also, 33% said they had no corporate policy in place covering electronic records management in general, and 20% didn't even know if they had a policy.**

**The average gigabyte of e-mail contains 100,000 printed pages, as compared to 3,000 pages for an average box of printed records.**

With the average company creating at least a million e-mail messages each day, and with over 90% of new corporate data generated electronically in a wide variety of formats, it is crucial to have an electronic records management strategy. Because of the volume of electronic data and its corresponding risks, the discovery of electronically stored information (ESI) raises significantly different issues from conventional paper discovery.

In December 2006, the U.S. Supreme Court approved a number of significant changes to the Federal Rules of Civil Procedure (FRCP), which demand early attention to the issue of document preservation, requiring documents to be preserved and presented for discovery “in native format” and “with metadata intact.” These amendments provide a framework for conducting electronic discovery, obliging litigants to identify, preserve and collect ESI very early in the case. Essentially, ESI has been identified as a separate and distinct category of documents that must be dealt with in the discovery process.

Many of the problems organizations face in light of the new rules have more to do with managing changing policies and procedures than with expensive IT solutions. Investing in a proper solution to assist in ESI management—whether digital document management, records management, e-mail archiving, e-discovery, indexing or other solution—is likely to be far less costly than paying dozens of attorneys upwards of \$200 an hour to sift through months or years of decentralized, unorganized electronic data, or paying huge fines and sanctions for failing to comply with new federal rules.

Digital document management solutions, especially those with a records management component, can help you prepare for the inevitable burden of an e-discovery order. With a well-developed records management policy supported by the right technology, you can turn the threat of e-discovery from a liability into a competitive advantage. While appropriate preparation may not help you avoid litigation entirely, it will reduce the time and expense of the discovery process. **Studies show that companies without a formal records management and e-discovery response process spend up to twice as much on discovery costs, and with discovery costs averaging \$140,000 per case, minimizing both time and expense becomes crucial.**

Ultimately, having a successful collection, disposal, retention and preservation process will help your organization avoid sanctions and may even result in one of the following outcomes:

- A “smoking gun” is found. While your organization is guilty, the upside is that you know this early and can settle as soon as possible. You save on outside legal costs, staff time and, quite likely, settlement costs as well.
- Information is found that completely exonerates your organization. You can present the evidence to the other side, resulting in dismissal of the case or termination of legal proceedings. The savings are quite clear.
- No information of any sort is found to prove or disprove guilt or innocence. Your organization can move forward without fear of repercussion from your legal strategy or any “surprise” electronic evidence, as you know where you stand.

The most important thing to realize is that your electronically stored information is not simply data, but evidence, and must be treated as such. An appropriate management strategy will reduce legal fees, save time and ease the legal process, making your organization better prepared to face litigation, regardless of the outcome.

## Defining “Electronically Stored Information”

The ease with which **electronically stored information (ESI)** can be generated, stored, altered, transmitted and destroyed has complicated the discovery process, as have the sheer volume of information that is processed and the various formats in which it can be created, stored and produced. ESI takes many forms, from e-mails, voicemails, instant messages and text messages to entries in online calendars and customer relationship management applications. ESI includes documents of any kind, such as voice messages, videos, photographs, text documents, spreadsheets, databases, file fragments, metadata, digital images and digital diagrams, and may reside in a variety of storage media, including hard drives, thumb drives or flash drives, workstations, home desktops, laptops, handheld devices such as PDAs, BlackBerries® or iPods®, backup tapes and optical disks.

Your organization likely has a closet—or even closets—full of old or broken computer equipment, leftover backup tapes from earlier systems that can no longer be read and any number of employee-created CDs, floppy disks and flash drives. The effort to recover usable ESI from each of these types of media can vary dramatically.

While new technology, such as e-mail archiving and document management systems, may make it possible to exert greater control over ESI, including automated electronic document management and deletion, the most important thing to remember is that **all information is fair game, regardless of where it is located.**

## Understanding the Amendments to the Federal Rules of Civil Procedure

The December 2006 amendments to the FRCP require organizations to exhaustively search for all electronically stored information, including—but not limited to—e-mail, which is “in the possession, custody or control of the party.” ESI is explicitly defined as a specific category of information that must be disclosed, removing any doubt as to what constitutes a “document” and creating a clear responsibility for organizations to produce ESI during discovery.

The new amendments can be categorized in terms of five major e-discovery areas:

- The definition of ESI as a separate class of discoverable information.
- The requirement for mandatory meet-and-confer sessions to address e-discovery issues that must take place very early in the litigation process.
- The designation of “reasonably inaccessible” electronic data and rules governing its production.
- The explanation of principles relating to “claims of privilege” and “clawback agreements” in cases of inadvertent production of privileged ESI.
- The addition of protection for organizations that have inadvertently destroyed potentially discoverable records in the course of normal, “good faith” records management operations.

Rule 26(f), which requires mandatory e-discovery related meetings or “meet and confer sessions” for litigants, demands early attention to the issue of data preservation. Organizations now need an up-to-date map of their entire electronic records landscape at the ready, along with the commensurate IT expertise to address and answer specific questions—from both parties’ counsel—regarding the number of discoverable repositories, file types and locations, access timeframes, access constraints, cost implications and relevance of metadata, among other issues. Knowing where information is stored and processed not only assists in keeping legal costs down, but also offers the advantage of answering with certainty when responding to the initial questions posed in this phase of discovery.

Rule 26(b)(2) permits parties to avoid discovery if the information is not reasonably accessible due to undue burden or cost. This includes electronic information that has to be converted or recovered in order to be usable, such as data backup tapes that are not systematically organized or indexed and data that has been deleted, fragmented or otherwise damaged. From a producing party’s standpoint, having data readily accessible lowers litigation costs, and organizations lacking solid records management programs are much more likely to be burdened by this rule than helped by it. It does not remove the onus of converting data or provide a loophole for avoiding production of relevant data, but does limit the cost of production based on the relevance of the data and the resources of the parties involved.<sup>1</sup>

Perhaps most crucial is rule 26(f)(3), which allows parties to determine the form in which data must be provided. *Williams v. Sprint*, 230 F.R.D. 640 (D.Kan. 2005) ruled that electronic documents must be produced “in native format” and “with their metadata intact.” Based on the *Williams* decision, printed copies and images do not satisfy this requirement, given that they are neither in native format nor do they have metadata intact. Converting electronic documents such as e-mail and word processing documents into archival images such as TIFF images removes metadata and any hidden comments, so imaged archival-quality copies of these particular electronic documents can be kept in this

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<sup>1</sup> For instance, a company being sued for \$100,000 and seeking to avoid an estimated cost burden of \$200,000 to recover requested ESI might receive a favorable ruling based on reasonable inaccessibility, but a global enterprise could be compelled to do whatever is necessary to produce similar evidence, particularly in a case where more is at stake.

format as long as it is part of the organization's formal records management program. If both parties agree that electronic documents can be presented as TIFF or PDF, that is acceptable, but if they cannot agree, documents must be produced in TIFF format.

Essentially, there are four forms of production:

- Handing data over in its native form, whatever that might be.
- Extracting data and handing it over in a "quasi-native" form, such as pulling information out of a large database and putting it into a more user-friendly product such as Microsoft® Access® or Excel®.
- Converting documents to TIFF, extracting some or all of the metadata, extracting some or all of the text and handing it over in a "quasi-paper" format.
- Handing over information as paper.

This information will be discussed and agreed upon in the mandatory "meet and confer" sessions that take place early in the litigation process.

For organizations that, as part of their records management program, routinely archive TIFF images of e-mails and electronic documents, once a litigation hold is issued, archival must cease and all e-mails and electronic documents must be preserved, with metadata intact, for later production.

For a complete summary of e-discovery related amendments to the FRCP, please consult the appendix.

## Developing an e-Discovery Response Plan

While it is important for all organizations, any organization that is publicly traded or is in a highly-litigious industry should have an **Electronic Discovery Response Plan (EDRP)** in place. Your EDRP Management Team should include operations and legal staff, a senior member of IT and your records manager, as well as members of your finance, accounting and HR teams. Foresight is critically important; your organization should have a plan in place long before the threat of litigation. Your organization's EDRP should outline a specific plan for suspension of usual document destruction and recycling protocols for when preservation of evidence is necessary.

As soon as litigation seems likely, the EDRP team should meet with your outside legal counsel to develop a legal hold. This legal hold should be framed by legal judgment and the legal requirements and issues of the case (such as key witnesses and date range), and should apply only to the life of the litigation, investigation, audit or other circumstances that have caused the suspension.

Some good indicators that litigation is “reasonably foreseeable” include:

- A formal complaint, subpoena or notification of a lawsuit is received.
- Somebody threatens litigation, even verbally, by saying “I am going to sue.”
- A regulatory or governmental body begins an investigation.
- An attorney or third-party investigator requests facts related to an incident or dispute.
- A work-related incident takes place, resulting in injury or death.
- An employee makes a formal complaint to management, especially when personnel issues are involved.

### Steps Your Organization Can Take to Prepare for Litigation

- Formalize document preservation and retention policies and procedures in a consistent, compliant, “good faith” records management policy.
- Establish a litigation readiness team of legal, IT and records management personnel that will establish the e-discovery process and deal with e-discovery issues.
- Inventory systems and sources of data, and identify their content, location and preferred form of production.
- For key systems, perform an initial assessment of the cost and methods of production to identify “not reasonably accessible” systems.
- Identify system custodians (administrators) and make sure they understand their roles.
- Apply retention policies to the systems and data sources.
- Develop, document, institute and verifiably enforce formal litigation hold and data preservation procedures.

As early in the process as possible, the EDRP team should identify and analyze all media on hand that may contain relevant data, in order to make accessibility and inaccessibility designations and ensure there is no risk of data spoliation. With proper planning, preparation for e-discovery can easily become a major part of your organizational records management policies and procedures.

For assistance in developing your EDRP, please refer to the included worksheet.

## Using Digital Document Management as a Part of Your e-Discovery Plan

To cope with the burden of e-discovery, an organization must develop consistent processes for managing, storing and deleting data, and must be able to determine the cost of accessing relevant information. There is no one-size-fits-all end-to-end solution, but any solution you develop should help your organization sift through large collections of unstructured data, such as e-mail and Microsoft Office® documents, and quickly identify the most relevant information.

A digital document management solution with a records management component can play a key part in your overall e-discovery planning. Digital document management systems protect and preserve both electronic and physical documents. Physical documents are scanned into the system and maintained in electronic form—as either TIFF or ASCII files, both of which are non-proprietary and unalterable—and electronic documents, including e-mail messages, can be maintained in their native file formats, maintaining existing metadata and hidden information, or converted into archival-quality images. Audit trail capability can guarantee that documents kept in native file formats are not deleted or modified, maintaining their value in the e-discovery process.

Digital document management solutions offer advanced indexing and searching capabilities, so **organizations that implement a digital document management component in concert with other solutions, whether e-mail archiving, content management or automated litigation support systems, enjoy both superlative information management capabilities and a quicker, more comprehensive response to litigation.** Effective programs often yield verifiable cost savings that pay for the initial program investment many times over, not to mention the significant cost savings of averting litigation and other compliance risk issues.

Adding records management capabilities to a document management system further strengthens an e-discovery plan. The U.S. Department of Defense (DoD) has established functional requirements for computer systems used to manage electronic records, and **DoD Standard 5015.2 has become the de facto standard for records management software across a wide spectrum of industries.** DoD 5015.2 outlines the baseline functionality required for records management applications used by the U.S. Department of Defense and has been endorsed by the National Archives and Records Administration (NARA) as an “adequate and appropriate basis for addressing the basic challenges of managing records in the automated environment that increasingly characterizes the creation and use of records.” Records management applications that have been certified as DoD 5015.2-compliant provide the peace of mind that comes from objective, third-party evaluation.

Records management applications commonly provide specialized security and auditing functionality tailored to the needs of records managers, including:

- Improved efficiency in the storage, retention and disposition of records and records series.
- Detailed reports of which records are eligible for transfer, accession or destruction.
- Audit trails to track all system activity and the entire life cycle of records.

Records management applications enable the application of systematic controls and policies concerning the life cycle of those records that detail an organization’s business transactions. Records management applications enable records managers to file records according to a determined scheme, to control the life cycle of records, to retrieve records based on partial information and to identify records that are due for final disposition.

With **proactive life cycle management**, native file formats are only used during the collaborative (active) phase of a document's life cycle. Once the information is no longer active and moves into the retention phase, it is converted to archival format (either TIFF or ASCII) and the electronic document is purged. Thus, when a document is required for discovery, you can present the archival image, along with associated metadata. Preserving an archival image, along with index data, removes the liability of having to produce an electronic file that may include comments and revision history.

If your organization chooses to utilize proactive life cycle management, you must formally document the procedure in case of eventual litigation. Once litigation is reasonably foreseeable, you must stop the conversion of electronic documents into archival images and must maintain all ESI in its native format, at least until the meet and confer conference when both parties can agree on the production format.

In e-discovery, generally **the information that is most expensive to recover should have been destroyed years ago**. With a records management solution, you are able to enforce retention policies more easily, so that information is purged when it should be. Over-retention leaves your organization vulnerable to higher long-term costs and risks. Eliminating obsolete or duplicate documents can reduce storage needs by up to 80%, not to mention the risk of retaining documents that should have been destroyed years ago. With appropriate retention policies, you minimize the liability of obsolete information and reduce the cost of discovery.

It is absolutely essential for your organization to develop, document, institute and verifiably enforce a data preservation policy, and digital document management solutions with a DoD 5015.2-certified records management component can play a key part in this plan. By enforcing your records management policy—including automating retention and destruction processes—and proactively managing electronic alongside physical data, your e-discovery program will be easier for all parties to understand, explain and work within.

## Conclusion

The volume of electronic data required in the litigation process necessitates proactive planning in order to preserve and protect potentially discoverable data. In order to prevent discovery conflicts, sanctions or an adverse verdict, litigants who anticipate the use of ESI should seek to develop a full-featured records management program covering both electronic and physical records. ESI should be routinely destroyed in accordance with written policies when it is no longer operationally or legally required. All other policies—such as those related to e-mail, privilege protection, security and privacy—should be reviewed and updated as necessary. As always, you should consult with your attorney before implementing any program.

Digital document and records management applications can be one piece of the e-discovery puzzle. While they by themselves will not solve the problem of managing ESI, they provide an important key to developing an enterprise-wide records management policy that can protect your organization from the threat of litigation.

## Worksheet: Developing Your Organization's e-Discovery Response Plan

While each organization is unique, some general principles apply when it comes to preparing for litigation and associated preservation orders. The following worksheet will help you assess your preparation for e-discovery and develop an e-discovery response plan (EDRP), including procedures to implement a litigation hold on discoverable data.

### STEP 1

#### Do you have a discovery response team?

Yes     No

*You should have a EDRP team consisting of—at a minimum—representatives from your legal department, records management team, IT infrastructure and data storage teams, finance department, human resources and any other departments commonly subject to discovery requests.*

#### Who will be on your EDRP team?

- Legal: \_\_\_\_\_
- Records Management: \_\_\_\_\_
- IT: Infrastructure \_\_\_\_\_  
Data Storage \_\_\_\_\_
- Finance: \_\_\_\_\_
- Human Resources: \_\_\_\_\_
- Any other staff: \_\_\_\_\_
- Outside experts: \_\_\_\_\_

Step 1 Completed?

### STEP 2

#### Have you developed a systems inventory?

Yes     No

You should create a map of business applications, e-mail applications and other systems that manage user documents. The map should include physical locations, operating systems, backup systems and schedules, and IT personnel responsible for maintaining the map.

Who is responsible for developing your systems map? \_\_\_\_\_

Step 2 Completed?

STEP 3

**E-mail Storage and Maintenance**

- Where is your e-mail maintained? In what format is it maintained?

\_\_\_\_\_

- Are copies of e-mails also stored on local machines?

\_\_\_\_\_

- How do you currently identify e-mail required for response to e-discovery requests?

\_\_\_\_\_

- How long is e-mail kept?

\_\_\_\_\_

Step 3 Completed?

STEP 4

**Do you have a plan to preserve your financial data?**

- Yes     No

**Who is responsible for developing your financial data preservation plan?**

\_\_\_\_\_

Step 4 Completed?

STEP 5

**Corporate Data Retention Schedule**

Is your retention schedule current?

- Yes     No

Does your records management plan accurately reflect the information generated by your organization?

- Yes     No

Are your retention periods accurate?

- Yes     No

Is your plan currently being followed for all paper and electronic records?

- Yes     No

Who is responsible for records management? \_\_\_\_\_

Step 5 Completed?

STEP 6

**What areas have been subject to discovery requests and preservation holds in the past?**

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*For example, if 70% of past discovery request have related to financial information while 30% have related to HR, you will want to focus your plan on those areas in particular.*

Step 6 Completed?

STEP 7

**Have you developed an e-discovery response plan?**

Yes     No

Your EDRP team should work together to design a plan based on high-priority scenarios. For example, your team may determine that a particular type of request may require additional IT resources or even change the systems, tools and processes for data storage. Or you may find a legacy system with unmigrated data that may require restoration in order to secure the data. You may even decide that your organization no longer needs certain information or that you need to implement a records management plan. Please remember to consult an attorney for information on your specific situation, and always consult with your records manager and legal department before destroying any data or changing retention periods.

Also, you should work with your EDRP team to develop a litigation hold process. Whenever litigation is “reasonably anticipated,” you must use this process to assure that relevant data is not deleted. A sample litigation hold process appears below.

Step 7 Completed?

## Sample Litigation Hold Response Process

STEP	STAFF ROLE	ACTION	TASKS	OUTCOME
1	EDRP Team	Establish the preliminary scope and subject matter for litigation hold.	<ol style="list-style-type: none"> <li>1) Collect list of names involved in case.</li> <li>2) Establish preliminary subjects for data identification and instructions for named data custodians.</li> </ol>	Establish preliminary scope of hold notice.
2	Legal	Inform appropriate management personnel of hold notice and data subjects.	<ol style="list-style-type: none"> <li>1) Review/assign roles and responsibilities for implementing the hold notice.</li> <li>2) Review standard data preservation plan to see if any adjustments are necessary, including standard list of potential data sources.</li> </ol>	Develop clear orders for management to implement the litigation hold.
3	Legal	Issue formal Hold Notice to any involved parties.	<ol style="list-style-type: none"> <li>1) Send message to involved parties to refrain from adherence to destruction policies for broad definition of data to preserve.</li> </ol>	Prevent deletion of important data.
4	EDRP Team	Assign management-level staff member to serve as “Electronic Data Collection Coordinator” (EDCC) for the case.	<ol style="list-style-type: none"> <li>1) Provide the assigned EDCC the details of the case.</li> <li>2) Give EDCC clear instructions on implementing hold notice response procedures.</li> </ol>	Determine one person responsible for planning preservation and collection efforts.
5	EDCC	Ensure secure storage areas for applicable electronic data are established for the case.	<ol style="list-style-type: none"> <li>1) Plan and, if appropriate, build case folder structure following accepted general guidelines and template for holding unstructured electronic documents.</li> <li>2) Establish a voicemail hold area.</li> <li>3) Establish an e-mail hold area.</li> <li>4) Develop instructions on how to use these areas.</li> </ol>	Set up electronic records storage area; begin data collection and logging.
6	Legal	Strategically refine scope of records and means of preservation and production.	<ol style="list-style-type: none"> <li>1) Revise subject areas and records to preserve based upon current knowledge and legal input.</li> <li>2) Collaborate towards legal and practical decisions about measures for preservation and gathering of records, given the needs of the current case.</li> </ol>	Refine search terms and measures for collected records. Develop production strategy.

STEP	STAFF ROLE	ACTION	TASKS	OUTCOME
7	Legal	Follow up on initial hold notice, identifying specific steps to take for preservation.	<ol style="list-style-type: none"> <li>1) Send message to involved parties.</li> <li>2) Include instructions for using electronic records storage areas, overview of key process steps and identification of who the EDCC for the case is.</li> </ol>	Begin data collection.
8	Legal and EDCC	Review the instructions for collecting electronic data relating to the case.	<ol style="list-style-type: none"> <li>1) Meet to review and document the decision to proceed.</li> <li>2) Draft message to all parties letting them know that the data collection process is underway.</li> </ol>	Agreement on data storage areas and instructions given to involved staff.
9	EDCC	Complete the data collection process with all named staff.	<ol style="list-style-type: none"> <li>1) Schedule an interview to review workstation, laptop, portable electronic devices and home computer, if applicable.</li> <li>2) Document the findings.</li> <li>3) Communicate exactly what will be done with this data and answer any questions.</li> </ol>	Continuation of data collection, with data collection entries logged.
10	EDCC	Develop preliminary data collection plan.	<ol style="list-style-type: none"> <li>1) Draft plan document.</li> <li>2) Conduct electronic data review with legal team and management staff.</li> </ol>	Complete preliminary data collection plan.
11	EDCC, Legal, EDRP Team	Analyze results.	<ol style="list-style-type: none"> <li>1) Meet to adjust scope and/or data collection plan (if necessary).</li> </ol>	Complete data collection plan. Let EDCC proceed with data collection.
12	EDCC and IT support staff	Collect electronic data sources following the data collection plan.	<ol style="list-style-type: none"> <li>1) Copy each person's personal folder or pertinent portions of drive, inbox, shared work area, etc. (IT/EDRP should already have identified appropriate technology to use in this process.)</li> <li>2) Inform Legal Team when complete.</li> </ol>	Complete data collection. Make disaster recovery backup. Bring data online.
13	EDCC and Legal	Develop ongoing data collection plan.	<ol style="list-style-type: none"> <li>1) Draft plan document and review with legal, management and EDRP.</li> <li>2) Approve plan.</li> <li>3) Relay information to appropriate parties.</li> </ol>	Complete monitoring process.
14	EDCC and Legal	Monitor ongoing data collection efforts performed by involved parties.	<ol style="list-style-type: none"> <li>1) Assure that involved parties are using the copy areas identified in the hold notice.</li> </ol>	Continue tracking as needed.

## Appendix: FRCP e-Discovery Guidelines at a Glance

RULE	DESCRIPTION	IMPLICATIONS
26(a)	Explicitly makes “electronically stored information” a category of discoverable data, and each party must furnish the other a copy or description of all discoverable material (including ESI) in its possession or control.	Removes loopholes around the production of e-mails, instant messages, PDAs or other forms of electronic data. Requires that organizations have a clear records management roadmap and all data readily available.
26(b)(2)	Sets up provisions to deal with not “reasonably accessible” ESI.	Requires companies to identify early in the process what ESI discovery may be difficult or expensive, and identify it to other parties, with reasonable specificity.
26(b)(5)	Clarifies procedures for retrieval of privileged information that is inadvertently produced.	Places a premium on the producing party’s determination of what was actually in produced ESI as promptly as practicable. Allows a “clawback” provision for retraction of inadvertently disclosed privileged data.
26(f)	Mandates early meet-and-confer sessions.	Requires organizations to know precisely where all their records are kept, in what format, how old they are, etc., in order to negotiate e-discovery issues.
34(b)	Requires production of ESI in a form in which it is ordinarily maintained or a form that is readily usable.	Requires organizations to keep ESI in a readily usable form, or, at a minimum, in the form that it is usually maintained.
37(f)	Mandates production of electronic documents “in native format” and “with their metadata intact.”  Provides “safe harbor” in the event of “good faith” destruction of discoverable data.	Obligates organizations to have a compliant records management program to show management of electronic data and that any inadvertent destruction of ESI was in “good faith” following of these policies. Also requires organizations to take “affirmative steps” to preserve documents, including issuing litigation holds to prevent ESI destruction.



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For more information, contact:  
**info@laserfiche.com**

**Laserfiche**  
3545 Long Beach Blvd.  
Long Beach, CA 90807  
United States

Phone: 562-988-1688  
Toll-free: 800-985-8533 (within the U.S.)  
Fax: 562-988-1886  
Web: **www.laserfiche.com**