

Interwoven® WorkSite MP Records Management Server

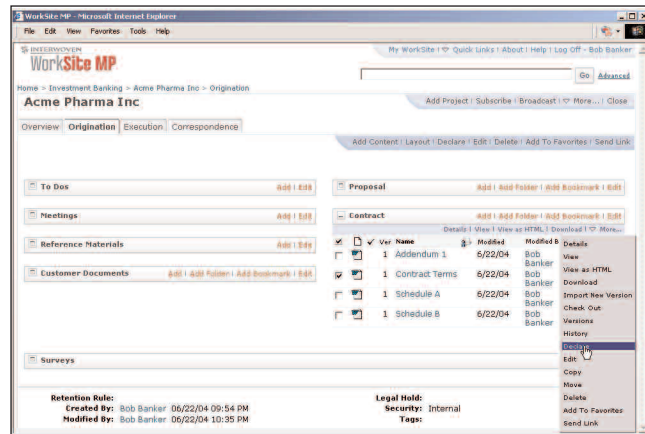
Powering Document Compliance

With WorkSite MP Records Management Server, your organization can extend the value of the WorkSite MP Collaborative Document Management platform to help satisfy the increased control, oversight, and compliance initiatives that exist within enterprises today. With escalating defense and discovery costs, fees and penalties, and even the possibility of criminal charges, many companies have realized that a records management system not only lowers their overall risk profile, but indeed, leads to cost reductions and process efficiencies. WorkSite MP Records Management Server is a 100% J2EE application, designed from the ground up to help protect critical documents, projects, workspaces, and e-mail within your organization and to do it in a way that delivers quick risk reduction and return on investment (ROI).

An Enterprise-Class Records Management Solution for the “Front Office”

As transactions are completed, audits concluded, and contracts signed, employees throughout the organization are creating corporate content that may need to be managed as records, or otherwise controlled with specific access and retention rights. WorkSite MP Records Management Server gives organizations and their employees the tools to manage records in a more controlled manner. As information is declared as a record, special control is placed on the document, folder, project, or workspace that saves it in its final, immutable form and prevents users from changing, modifying, or deleting the information. Importantly, not only can users manage individual documents as records, they can declare and manage collections of content as records, including entire projects, workspaces, and folders — a critical WorkSite MP Records Management Server advantage. As a result, organizations can bring important documents, e-mail, and collaborative items, such as calendar, tasks, and milestones, under ongoing management and control with appropriate retention rules.

Critical in many areas within an organization, the ability to manage content and project workspaces as



Declaring a record from the Web client

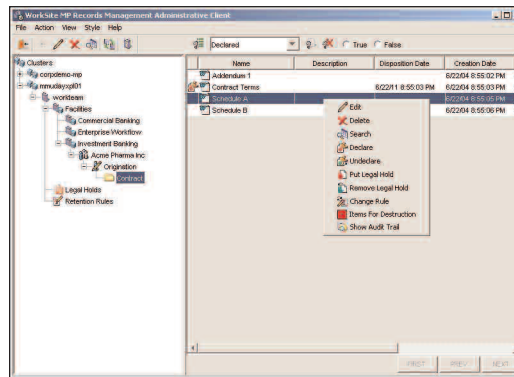
records is particularly relevant in the areas of deal management, engagement management, corporate legal projects, and research management — common areas of use for WorkSite MP. However, in addition to these specialized use cases, WorkSite MP’s broad functional footprint makes this records management functionality appropriate for all collaborative document management applications.

High Ease of Use with “Point and Click” setup

Records administrators and workspace owners have simple point-and-click selection tools where they can “enable” the records management features of the WorkSite MP Records Management Server. Once enabled, end users can manage the full spectrum of project information and documents including: folders, document versions, project spaces, and knowledge spaces. Once selected, items are assigned a retention rule, indicating the retention duration and from that point on they are marked as “read only”. Additionally, when appropriate, access rights can be modified to limit the audience that can view the record. As with all assets and projects managed within WorkSite MP, the complete document history is available to view, providing an audit trail including who first created the document or project, who reviewed and approved it, and when it was declared as a record, providing complete management visibility.

Key Features

- **Manage records seamlessly**
Without leaving the WorkSite MP client environments, users can simply declare items through a drop down menu or by right-mouse-button functionality to expose the records management “declare” feature. Simply selecting “declare” presents the user with a dialog box to select the appropriate retention rule and provide a notation to the file as needed. WorkSite MP Records Management provides complete control of the record with functionality that exists within familiar client interfaces — no bouncing back and forth and training on disparate applications.
- **Different levels of granularity**
A significant differentiator for WorkSite MP Records Management Server is in its ability to define different levels of content that are to be managed as records. Traditional record management occurs only at the document level; however, with WorkSite MP Records Management Server this control can also be extended upward, so that entire folders, projects, and workspaces can be managed. In this way, not only are the individual documents being brought under appropriate management, but so too is the context of the overall project, including e-mail, discussion threads, calendar events, milestones, and other collaborative elements.
- **Functionality to appropriate users**
Central management of retention rules, configuration, and preferences are controlled through a Java-based Administrative Client on the desktop. Records managers are able to search through declared content, apply legal holds, and manage the disposition process through this highly secure client. However, as with all WorkSite MP offerings, the full API allows companies to extend the functionality of WorkSite MP Records Management Server to custom clients and third party applications.
- **Multiple ways of declaring records**
Declare records either manually as an end user or through metadata searches to make sure all content is being managed properly. This provides a “blended control” model where responsibility is given and expected of the end users; however, records managers and administrators also have back office search and declaration tools to make sure that all appropriate information is indeed being selected and managed appropriately as records.



Records Manager Administrative Client

- **Notifications prior to deletion**
Upon the completion of the retention period, notifications are created highlighting the items that are scheduled for deletion. As a safeguard, the records manager reviews and must approve this information, prior to any document, folder, project, or workspace being deleted. Deletion is compliant with electronic shredding standards.

Summary

WorkSite MP Records Management Server helps increase the control and success of your compliance, oversight, and records management initiatives. Employees are ultimately responsible for properly selecting and managing the records that they create and with WorkSite MP Records Management Server they can accomplish this with out-of-the-box and easy-to-use features that deliver quick and compelling risk reduction & ROI.

For information on supported platforms and system requirements, please download the datasheet at:
http://www.interwoven.com/documents/solutionbriefs/sb_wsmpsp.pdf

Interwoven, Inc.
803 11th Avenue
Sunnyvale, CA 94089 USA
(408) 774-2000
www.interwoven.com

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