

## Data Sheet

### Interwoven® RecordsManager

#### Overview

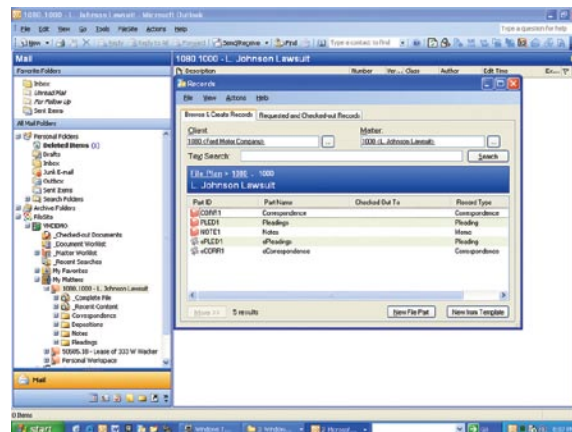
Professional services firms are faced with a number of challenges regarding how to most effectively manage vital information. While the right solution should minimize risk and improve productivity, it should not throw current IT processes off course or disrupt end-user work processes.

Adding urgency and complexity to the task is information overload with files accumulating at an even faster pace, and in a diversity of formats including physical and electronic records, as well as e-mails and their attachments. These challenges together call for a solution that can efficiently manage valuable organizational content, protect it from loss or corruption, and ensure that users have the information they need when they need it.

Interwoven RecordsManager addresses these challenges with an end-to-end solution that manages physical, electronic, and e-mail records effectively and automatically throughout the information lifecycle. You can ensure that your information will be accessible to users, held according to your unique retention policies, and managed for compliance with the latest legal regulations and legislation.

#### The Records Management Challenge

With e-records reaching the millions or tens of millions in some organizations, it is no longer feasible to rely on individuals to manually classify each record. To effectively streamline and automate the process of capturing, classifying, and declaring records according to a defined policy, you need a solution that addresses legal and end-user requirements and supports current business processes.



Interwoven Records Manager provides extensive search capabilities to enable you to identify records in any location

Consider these two important points when implementing a records management solution:

- Records cannot be effectively or securely managed in individual “silos” by separate systems for each record type—e-mail, physical, and electronic.
- The most effective way to apply records policies is via a single control procedure that can be implemented centrally and easily applied by end-users.

Addressing these two points, Interwoven RecordsManager provides a single policy management and application engine to control records consistently and effectively across offices, media types, and systems in order to reduce the cost of managing records and the risk of non-compliance.

#### WorkSite Integration

With Interwoven RecordsManager, you can address your toughest information management challenges and benefit from full integration with WorkSite, Interwoven’s market-leading collaborative document management system for total management

of paper, electronic documents, and e-mail in a single solution.

#### Matter/Engagement-Centric Records Management

Interwoven Records Manager seamlessly manages all records including physical, electronic, and e-mail within an electronic matter, or engagement, file via its innovative matter/engagement-centric collaboration approach. Following are a few of the benefits of this approach:

#### Apply Retention Policies At Any Level

By extending a matter/engagement-centric focus to records management, Interwoven RecordsManager automatically applies retention policies at any level—the entire matter or engagement hierarchy, a single folder, a subfolder, or a specific document. By automatically associating retention policies, and other metadata, you can file documents and e-mails by business purpose as you normally would. This eliminates manual classification and ensures consistent application of corporate policy.

## Interwoven is a global leader in content management solutions

Interwoven is a global leader in content management solutions. Interwoven's software and services enable organizations to effectively leverage content to drive business growth by improving the customer experience, increasing collaboration, and streamlining business processes in dynamic environments. Our unique approach combines user-friendly simplicity with robust IT performance and scalability to unlock the value of content. Some of the most recognized enterprise and professional services organizations worldwide have chosen Interwoven, including: adidas, Airbus, Avaya, Cisco, DLA Piper, the Federal Reserve Bank, FedEx, HSBC, LexisNexis, Microsoft, Samsung, Shell, Samsonite, White & Case, and Yamaha. Over 20,000 developers and over 300 partners enrich and extend Interwoven's offerings. To learn more about Interwoven, please visit [www.interwoven.com](http://www.interwoven.com).

<b>Key Features</b>	
<b>Key feature</b>	<b>What it does</b>
Seamless management of all record types	Manage all records in your enterprise regardless of media type including physical, electronic, e-mail and e-mail attachments.
Robust records management	Interwoven RecordsManager allows you to manage physical files at the warehouse, shelf, box, folder, subfolder, or document level to provide all the information to instantly know records availability, location, and contents.
Track physical records on- and off-site	Easily track the location of physical records on-site or off-site with a range of details about when they were moved, location, and storage vendor. Administrators can create requests for boxes stored off-site and manage logistics of physical records movement.
Powerful search	Interwoven RecordsManager enables you to find records quickly using key words, Boolean search operators, proximity, and full text searches.
Consistent application of retention policies	You can associate policies automatically based on where items are filed, and declare records at any level of the engagement/matter hierarchy—single document, folder, matter, engagement, or client.
Centrally managed retention policies	A central interface enables you to create and manage records retention policies and specify trigger events, retention periods, and disposition rules. Create a policy that fits your unique requirements by incorporating multiple events, defining event types, and integrating custom data.
Flexible Metadata	You can create any number of metadata attributes at all file levels, produce forms for data entry and display, customize existing reports, and create new reports.
Policy-based server managed ethical walls	Interwoven RecordsManager provides server-based ethical walls implemented on a policy-based system integrated with the security policies of the organization.
Advance three-tier architecture	Interwoven is built on a highly-scalable, three-tier architecture to meet the functional needs of small and large firms, as well as globally distributed organizations.
Support for stationary & portable code readers	To leverage the benefits of bar code technology, Interwoven RecordsManager integrates with stationery and portable bar code scanners to allow rapid physical inventories. You can quickly check file rooms, perform "desk audits" to confirm which files are with users, and track items in off-site storage. From any location, you can perform the standard tracking functions of checking-out, checking-in, transferring, boxing, relocating, and destroying folders, subfolders, and boxes.

### **Create Project Folders Automatically**

Interwoven RecordsManager provides templates to automatically set up entire project folders with corresponding records policies based on your current business processes or best practices. For example, correspondence, work-in-process, and finished product can be established, all with unique policies applied automatically.

### **Increased Productivity and Efficiency**

With Interwoven RecordsManager, new folders, subfolders, and documents automatically inherit the policy of the level above. This saves time by automatically associating the engagement- or matter-specific retention period to all folders created for that project or matter. Critical records designations can also occur at any level to allow a complete file or single folder to be declared with a single click.

### **Seamless Integration with Industry Leading WorkSite**

Interwoven RecordsManager integrates with WorkSite—the leading collaborative document management platform for the professional services markets-to provide complete management of the matter/engagement lifecycle. Over 1,700 organizations worldwide rely on the proven technology of Interwoven WorkSite for mission critical collaboration and document management.

Interwoven RecordsManager continues the commitment of Interwoven to being the leader in helping companies address today's most pressing content management issues. To find out more about Interwoven RecordsManager, visit [www.interwoven.com](http://www.interwoven.com).

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