

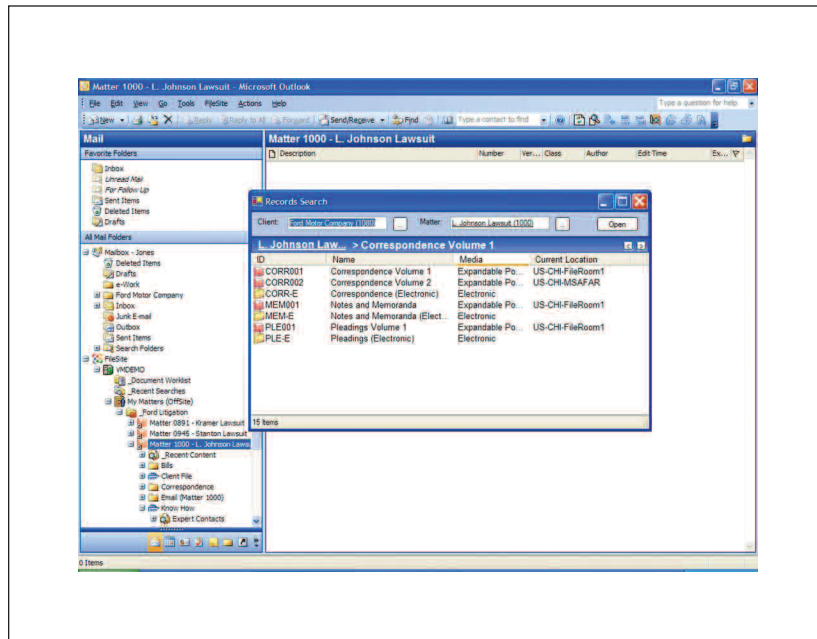
Interwoven® RecordsManager

In today's Professional Services environment, firms are seeking an effective way to manage records retention across an increasing variety of electronic and physical records content and media. With the volume of electronic content such as electronic documents and e-mail growing exponentially faster than physical (paper) content in most businesses, organizations can no longer rely on individuals to manually classify what in many cases is millions or tens of millions of pieces of content individually. It must be accomplished in an automated manner, based on business purpose and legal requirements, and by the user. Moreover, records can not be effectively managed in "silos" with e-mail classified in one system under one control regime, physical records in another and electronic documents in yet a third. Consistent application of records policy requires a single control regime, implemented centrally but applied in a distributed fashion by end-users without imposing any additional work or steps. Interwoven

single policy management and application engine, Interwoven RecordsManager enables organizations to control records consistently and effectively across offices, media types and systems, reducing the cost of managing records and the risk from inconsistent application of records policies.

Contextual Records Management

Interwoven pioneered Matter/Project Centric Collaboration, a complete approach to managing e-mail and documents seamlessly in an electronic matter or project file. Interwoven RecordsManager extends this matter- or project-centric focus to records management by enabling retention policies to be automatically applied at any level of a matter or project hierarchy – the entire hierarchy, a single folder, subfolder or specific document. Templates can create entire project folders automatically based on the business process or best practices of the organization. Furthermore, records policies can be



Interwoven RecordsManager features extensive search capabilities to enable you to identify records in any location.

RecordsManager provides an effective solution to meeting these challenges and is fully integrated with WorkSite, Interwoven's market-leading collaborative document management system, providing management of paper, electronic documents and e-mail in a single solution. By enabling the management of all forms of records – even in other systems – from a

assigned to each folder based on company policy and its business purpose. For example, correspondence, work-in-process and finished product can all have different policies applied automatically. By having retention policies (and other metadata) associated automatically, Interwoven RecordsManager

enables users to file documents and e-mails by business purpose as they normally would, and use that context to automatically associate a records policy – eliminating manual classification and ensuring consistent application of corporate policy. New folders, subfolders, and documents which are created automatically using powerful template tools inherit the policy of the level above, so the retention period that may be specific to a project or matter is automatically associated with all folders created for that project or matter. Critical records designations may also occur at any level, enabling a complete file or single folder to be declared with a single click.

Key Features of Interwoven RecordsManager include:

- **Flexible metadata**
Allows for the creation of any number of metadata attributes at all file levels; the creation of custom forms for data entry and display; and the customization of reports, as well as the creation of new reports.
- **Consistent application of retention policies across physical, electronic and e-mail records**
Associate policies automatically based on where items are filed. Declare records at any level of the project/matter hierarchy – single document, folder, matter project, or client.
- **Manage retention policies centrally**
A central interface enables users to create and manage the retention policy and specify trigger events, retention periods, and disposition rules. Enables incorporation of multiple events, definable event types, and integration with custom data.
- **Comprehensive physical records management model**
Interwoven RecordsManager lets you manage physical files at the warehouse, shelf, box, folder, subfolder or document level, so records availability, location, and contents are known instantly.
- **Ability to track physical records at both on- and off-site locations**
Interwoven RecordsManager enables users to track locations of physical records whether they are located on-site, or when they are moved off site for storage by off-site storage vendors. Administrators can create requests for boxes stored off site and manage the logistics of moving paper from on-site to off-site locations.
- **Policy-based, Server-managed Ethical Walls**
Provides ethical walls implemented on a policy-based system that is integrated with the security policies of the organization and completely server-based.
- **Multi-Tier, Service-Oriented Architecture (SOA)**
Built on a highly-scalable service-oriented architecture to meet the functional needs of small and large firms, as well as globally distributed organizations.

- **Support for stationery and portable bar code readers**
Bar code technology assures fast and accurate tracking and inventory. Interwoven RecordsManager integrates with stationery and portable bar code scanners, enabling rapid physical inventories of the file room, performing “desk audits” to confirm which files are in the possession of users, and tracking items in off-site storage. From any location, you can also perform the standard tracking functions of checking out, checking in, transferring, boxing, relocating, and destroying folders, subfolders, and boxes.
- **Powerful search capability**
Finds records quickly by using key words, Boolean search operators, proximity, and full text.

Robust Reliable Platform From An Industry Leader

Interwoven RecordsManager integrates with WorkSite—the leading collaborative document management platform for the legal, accounting and professional services markets – to provide complete management of the matter/engagement lifecycle. Over 1,500 organizations and 600,000 professionals worldwide rely on Interwoven WorkSite’s proven technology for mission critical collaboration and document management. Interwoven RecordsManager continues Interwoven’s commitment to being the leader in helping companies address today’s most pressing content management issues.

About Interwoven

Interwoven, Inc., provider of Enterprise Content Management (ECM) solutions for business, enables organizations to unify people, content and processes to minimize business risk, accelerate time-to-value and sustain lower total cost of ownership. Interwoven delivers deep industry-specific solutions which reduce business process cycle time from initial collaboration through design, production, sales, marketing, legal review, IT and service. Interwoven leads the industry with a service-oriented architecture today and easy-to-use, best-in-class components and solutions. Today, 3,300 enterprises, law firms and professional services organizations worldwide are Interwoven customers, including BT, Ford, Freshfields Bruckhaus Deringer, General Motors, Jones Day, Motorola and Yamaha. For more information visit www.interwoven.com.

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