

Intelligence

Butler Group Subscription Services

Collaboration

TECHNOLOGY AUDIT

Interwoven

WorkSite MP 4

Abstract *WorkSite MP 4 is a Web accessed, collaborative content management platform, which includes both document and records management. Upon this platform, Collaborative Document Management (CDM) business solutions can be constructed, which offer organisations the opportunity to derive operational benefits rapidly after deployment. It has tight integration with existing users desktop products, minimising the problems of adoption. With a range of potential platforms and high-scalability, it will be of benefit to any larger organisation, which requires people to collaborate around documents in a structured manner. This is the first product to be produced since Interwoven merged with iManage, and reflects the very tight integration that has been achieved between the two companies product lines. Butler Group believes that in WorkSite MP 4, Interwoven has recognised the issues that have held back many collaborative projects, and has created a class-leading collaborative solution.*

KEY FINDINGS

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| ✓ Seamless integration between front office activity, and collaborative functionality. | ✓ Option of full audit trail, and Records Management for compliance. |
| ✓ Effective offline client. | <i>i</i> Platform agnostic. |
| ✓ Comprehensive delegated security model. | <i>i</i> Most suitable for high-end, or Enterprise deployments. |

Key: ✓ Product Strength ✗ Product Weakness *i* Point of Information

LOOK AHEAD

In WorkSite MP, the combination of the collaboration tools, and mature content management technologies has 'raised the bar' for collaborative technologies. Additional CDM solutions will offer 'off-the-shelf' products that can deliver fast adoption and Return On Investment for organisations.

► FUNCTIONALITY

The concept of a single collaborative environment, enabling groups of users, whether as project teams or within a business unit, to work on a single set of documents in a structured and controlled manner is an attractive proposition. It offers the potential benefits of integrity of process, the effective sharing, and reuse of knowledge; faster time to completion of tasks, and most importantly, a single version of the truth. Unfortunately many collaborative solutions do not reflect the ways in which people actually work:

- There is often an in-built assumption that all users are connected to a network, all of the time.
- Similarly there is an expectation that the only document types that will be shared are Word processed or spreadsheets.
- Whilst documents, and other pieces of content can be 'locked', and checked-in/out, there is often no recognition that such documents can form records, and that audit trails of all changes, and edits, may be essential, particularly in a compliance context.

The increasing number of people that work in multiple teams, across diverse locations, time zones, and organisations, who also often travel extensively, present great challenges for organisations endeavouring to derive the benefits from collaboration. Somewhat perversely, when one looks at the objective, the user has to adjust what might be their most effective working practice to utilise the collaborative solution. The result of such challenges is frequently poor adoption of the solution, or at worst avoidance, defeating the object of the investment.

WorkSite MP 4 combines the collaborative functionality developed by iManage, with the content and records management functionality from Interwoven, to provide a comprehensive platform, which should address many of the challenges identified above.

Product Analysis

WorkSite MP provides a range of collaborative, and document management functionality designed to let project groups, or business units, work effectively together, using a single, managed knowledge base. As the functionality can be accessed via a user's Office Desktop, or e-mail tools, and as part of their normal work processes, the training required by the user, and the time to start using collaborative functionality effectively are lowered.

WorkSite MP is java-based, can be deployed on a range of platforms, and is particularly suitable for heterogeneous environments. The architecture is designed for high-scalability, and to support geographically dispersed users. Within a single WorkSite MP installation, multiple organisations, or multiple departments can be logically separated, and delegated to their own areas, whilst existing within a single security model. The architecture also facilitates federated repositories, where multiple instances of WorkSite MP, potentially in geographically dispersed locations, can be configured to provide a unified repository.

There are three layers of users in WorkSite MP: administrators, business process owners, and users. These are managed within WorkSite MP, using a roles-based security model.

Enhancements to the previous iManage product include:

- Tight integration of the tools into user operational practices, reducing barriers to adoption. These include:
 - An offline client.
 - Virtual folders.
 - Deeper integration with Microsoft Outlook.
 - An improved Web client.
- Ease-of-configuration at business unit level through four new tools:
 1. User Interface configuration.
 2. Object modeller.
 3. Visual workflow modeller.
 4. Bulk loader for existing documents.
- Improved security, particularly for Extranet access
- Compliance and Document Management capabilities, including:
 - Full Records Management facilities.
 - Detailed audit trail and version/edit histories.
 - New document identities.
 - Support for parent – child fields.
 - Ability to render Adobe PDFs on the server.
 - Kofax (scanning/imaging) integration.

WorkSite MP functionality can also be exposed as portlets in BEA WebLogic Portal 8.1, the portal facilitating single sign-on for users.

To support the effective operation of multiple teams, WorkSite MP includes multi-level security, which can be synchronised with a corporate Lightweight Directory Access Protocol (LDAP)-compliant directory, if available. This may not always be practical, for example, if team members are external to the organisations, and the internal directory provides LDAP-style functionality to manage user access.

The comprehensive Document Management package includes:

- Routing.
- Approval.
- Sign-off.
- Versioning.
- Annotation.
- Tracking.
- Reporting.

These are all tightly integrated with the collaboration functionality.

Interwoven offers two versions of the Worksite MP product:

1. WorkSite MP Server – Available in either Corporate, or Workgroup editions, and offering fully integrated Document Management, workflow, and collaboration.
2. WorkSite MP Records Management Server – Extending the functionality of Worksite MP, by including the features for control and oversight of records and processes, which are increasingly required in relation to compliance issues.

There are also Client Integration Options, and an Office Integration Module. These two offerings facilitate tight integration with Microsoft Office, Microsoft Outlook, and Lotus Notes, allowing WorkSite MP functionality to be accessed from within those applications.

Product Operation

In WorkSite MP, Workspaces are created for each group or business unit, with defined projects, and folders. Within each Workspace, Members are assigned from the internal directory within WorkSite MP. Assignment includes membership of user groups, and respective privileges. Because the security model within WorkSite MP is highly delegated, such privileges can be highly granular and include:

- Send Broadcast messages – to all members of the Workspace.
- Create projects and workspace root content.
- Assign tasks.
- View Document history.
- View Workflow watchlist.
- Create and modify tags or items.
- Delete items.
- Manage security policies (for the Workspace).
- Manage Workplace, membership, and workgroups.

Or even full control of a Workspace.

The administrator of each Workspace can also set access rights to content items within the Workplace as required. Business process owners can define workflow, and set attributes for the content of folders and Workspaces. WorkSite MP includes a template designer, which offers a graphical design tool for workflow in a process, and the ability to manage the forms used at each stage.

The user view of WorkSite MP is highly configurable, and can be defined either by the administrator or business process owner, and amended by the user to construct a layout, which fits most appropriately with the way that they work, and the tasks, they have to fulfil. For example groups of different tasks, or folders can be displayed on 'tabbed pages' appropriate to projects. There is a highly granular search and indexing function, using the meta data of all the objects in the Workspace, including folders.

Whilst users are operating within a designated Workspace, any changes, such as the saving of the document to a folder, can automatically generate an e-mail notification to other members using that folder, or even the Workspace. For the collaborative items, documents, and even folders, additional meta data can be added via a Wizard-driven tool, or even automatically from the search and indexing capability.

Worksite MP includes a conversion tool on the server to render any document in the Workplace into a PDF format, meaning that users only require a PDF reader to see the documentation, not the base application such as a Word processed document, or a spreadsheet.

WorkSite MP is designed to be transparent to most users, so if required, users can interact with WorkSite MP via the e-mail interface. All project teams and Workspaces are allocated e-mail addresses, and it is as simple as including the e-mail address when sending a piece of content, for that content to be included in the workspace, and become available to all other members. WorkSite MP regards e-mail as just another document in the project store. It will store, note the version, and track changes just as with any other piece of content. E-mail can be cc'd or dragged and dropped into WorkSite MP Workspace. Further, the e-mail integration also allows all documents within subscribed workspaces to be accessed, checked-in/out, edited, annotated, and versioned directly.

WorkSite MP offers the opportunity of collaboration with less pain for the user. Utilising Interwoven's experience in content management, WorkSite MP can be described as 'project-centric', the focus being on ensuring documents have accurate metadata and that there is a single location for all documents relating to an individual project.

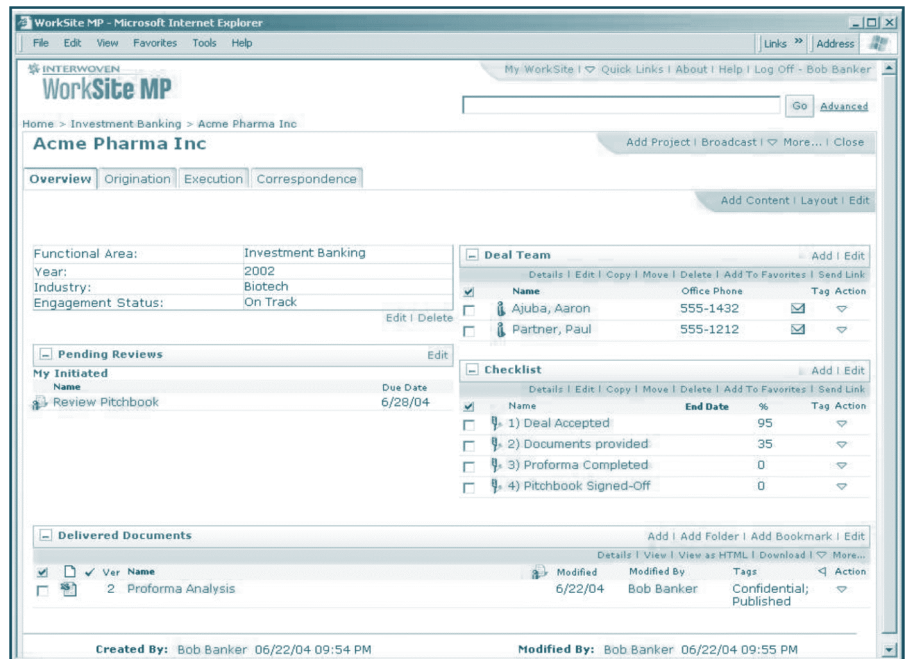


Figure 1: WorkSite MP 4 Screenshot

Offline Client

The new Offline client in WorkSite MP allows users to view, edit, and even add content, whilst disconnected from the network and server. This can be for a single folder, a project, or an entire Workspace, but the full audit trail facilitates the consolidation and consistency of any changes when the offline files are automatically synchronised back with the server. WorkSite MP includes functionality to identify conflicts in workflow through the processes being defined, and executed at time of synchronisation, for example, a new version of a document created outside of WorkSite MP. This functionality allows the viewing of the profile of the document and its history, allowing the administrator to either discard the change, save to a local file, or to cancel synchronisation.

WorkSite MP Records Management Server

The Records Management functionality is controlled by administrators and business process owners, through a point and click interface. Once enabled users can declare items as records from a right mouse click selection, or a drop-down menu from the application they are within. The user is then either prompted to assign the retention rule, and annotate the document, or the retention rules can have been previously set at folder or even Workspace level. Such rules do not only apply to items such as Word processed documents, they can also be applied to e-mails, calendar, tasks, and milestones. If appropriate, records can also be declared automatically from the document's meta data. This 'blended approach' allows for highly granular management of records without placing an undue overhead on users. As with the whole philosophy of Worksite MP, this is intended to increase adoption, and the Return On Investment (ROI).

CDM Solutions

Interwoven, its partners, and customers are using the WorkSite MP functionality to create Collaborative Document Management (CDM) Solutions for specific vertical industries. These offer organisations the opportunity to derive benefits rapidly after deployment. Current examples include:

- Solutions for Marketing.
- Solutions for Sales.
- Solutions for Service.
- Solutions for Finance.
- Solutions for Legal.
- Solutions for IT.

For example Interwoven has developed a solution with functionality highly appropriate for the Legal sector, where it has a significant presence. Here business process owners can create a personal 'filing cabinet' for individuals involved.

This contains information that is personal to the user, and can be managed by the user, or his/her assistant, before being published to the wider workplace. By inheriting metadata from the file, the user does not have to complete profile forms for each document, thus reducing time and increasing accuracy. It is possible to file records in bulk, and delay filing to a preset time if required.

There are also Solutions for particular horizontal tasks that have been developed using WorkSite MP:

- Deal Management (proposals and contracts).
- Engagement Management.
- Deal management.
- Research Management.
- Sarbanes-Oxley compliance.
- Corporate Legal solution.
- Board of Directors Collaboration.
- IT Project planning and delivery.

Product Emphasis

Adoption of any business solution is not about the technical or operational issues; the deciding factor is always cultural. All people work on the premise of 'what's in it for me?' If a solution supports, and complements the way the user normally works, even to the point that they do not realise they are using the solution, because its operation is transparent, then adoption and achievement of expected benefits for the organisation is much more likely. Butler Group believes that In WorkSite MP 4, Interwoven has recognised these issues. It is a high-end product both in terms of functionality and scalability, and Butler Group believes that it is most suitable for larger organisations.

DEPLOYMENT

WorkSite MP 4 uses a Java 2 Enterprise Edition (J2EE)-compliant Service Oriented Architecture (SOA). WorkSite MP Server and WorkSite MP Records Management Server are certified on Microsoft Windows 2000/2003 servers, and Microsoft SQL Server 2000 SP3. In Q3 2004, this will be extended to include Sun Solaris 8 and Oracle 8.1.7/9.2.0.

The supported Web components are Microsoft Windows 2000/2003 Server, and Apache Tomcat Application server 4.1.30, and in addition from Q3 2004, Sun Solaris 8 Server. In Q4 Red Hat Linux ES and IBM AIX 5.1 support will be added along with IBM WebSphere Application server 5.0.2, and BEA WebLogic Application Server 7.0/8.1. The two certified Web servers are Microsoft IIS 5.0 and Apache HTTP Server 2.0.43.

Desktop clients require Microsoft Windows 2000 or later, and Microsoft IE 5.5 or later for Web access. The Office Integration Client and Offline Client require SP2 for Microsoft Windows 2000/XP.

There are multiple Software Development Kits (SDKs) available for WorkSite MP including; Java, .NET, COM, and Web services. Each SDK has sample programs, and the WorkSite Object Model (WOM) Application Programming Interface (API). The WOM API can be used to create connectors to other applications and to manipulate objects during workflow.

The architecture of WorkSite MP enables it to scale to millions of documents and thousands of Workspaces. By utilising intelligent caching and server-to-server proxy, it can make the most efficient use of available network bandwidth. The ability for multi-tenant support, such as organisations or departments within a single instance of WorkSite MP, enables the maximum usage of servers, reducing replication in software and administration, and thus Total Cost of Ownership (TCO).

Deployment Examples

BainCapital LLC provides industry and investment specific research for private equity deal teams. It has US offices in Boston, New York, and San Francisco. BainCapital Europe has offices in London and Munich. The company utilises WorkSite MP and the associated functionality, for both Research Management and Team Collaboration. Each of its geographically dispersed teams has personalised views and dashboards of both the research and investment status. Importantly for BainCapital the information captured through the use of WorkSite MP is becoming an archive of all research and investment decisions for the future.

► PRODUCT STRATEGY

WorkSite MP 4 was announced in May 2004, and is the first product to be produced since Interwoven merged with iManage, it reflects the very tight integration that has been achieved between the two companies product lines. This is a horizontally applicable product, however, a key market for WorkSite MP is likely to be Interwoven's extensive customer base, particularly in legal firms, which can derive benefits from the additional functionality in the product. Interwoven has over 300 partners across the world, and will be working with them to develop additional CDM Solutions.

► COMPANY PROFILE

Interwoven (NASDAQ:IWOV) was founded in 1995, and is headquartered in Sunnyvale California, US. Its origins lay in the need of its founder to manage Web content for his on-line business, and one of its first customers was Cisco, which was pushing the boundaries of the Web. These drivers provided a very good learning cycle, and gave the company its customer-driven approach.

Offices are located throughout the US, in Canada, Mexico, Brazil, the UK (which houses the European headquarters), Japan, and Australia. There are over 700 employees, approximately 75 of whom are based in Europe. Key partners for Interwoven include:

- BEA.
- Accenture.
- Fujitsu Consulting Services.
- IBM Global Services.
- Intel.
- Adobe.
- PeopleSoft.
- Kofax.

Interwoven merged with the collaboration specialist iManage in 2003, in what has been regarded as a highly complimentary move. It is currently the 62nd largest software company in the world.

Revenues for the last three financial years, ending 31 March were:

	2003 (US\$ '000s)	2002 (US\$ '000s)	2001 (US\$ '000s)
Revenues	111,512	126,832	204,663
Increase (Decrease)	(2.1%)	(38.0%)	53.1%
Net Income	(47,531)	(148,616)	(129,175)

The current balance sheet reveals approximately US\$160 million in cash.

Interwoven has approximately 2,900 customers including Air France, Citibank, Ford, General Electric, Jones Day, Pfizer, Procter & Gamble, and Yamaha. Interwoven has significant presence in law firms, noting 54 out of the top 200 UK practices as its customers, and 51 of the top 100 in the US.

► SUMMARY

WorkSite MP is a Java-based collaborative document management platform, which offers high scalability, support for multiple platforms, and federated repositories. It has tight integration with front office tools, and automation of much of the Document and Records Management process, including the generation of meta data. The integral security model enables robust management of Internet, and Extranet users, and can be synchronised with an organisation's directory. 'Out-of-the-box' CDM Solutions can quickly be customised using the SDKs to integrate with existing systems, and offer the opportunity for rapid ROI. The Offline client will be of major benefit to increasingly mobile and dispersed knowledge workers.

In developing WorkSite MP, Interwoven has, using its extensive experience in content management, addressed many of the issues that form barriers to adoption of collaboration technologies, and created a class-leading collaborative solution.

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