



## **What's New in WorkSite MP 5.0**

March 19, 2007

WorkSite MP 5.0 provides combined document management, knowledge management, collaboration and digital asset management as well as an integration to Kofax Ascent Capture to help tame the prevalent and costly content management issues faced by enterprise organizations.

## **New Capabilities**

### **Media Add-on**

WorkSite MP Media Add-on incorporates a gallery view with thumbnails for WorkSite MP Knowledge Space and Collaboration Spaces. Specific ingestion and download tasks can be defined to help control how assets are shared in the repository and throughout the enterprise.

### **Desktop Forms**

WorkSite MP 5.0 has improved the out-of-the-box experience by updating the forms used for the WorkSite MP Office, Outlook, and Notes integration and it supports the ability to customize forms and incorporate scripting within the forms for more sophisticated customization of the integration environments.

### **Document Types**

WorkSite MP Document Types provide the ability to define custom document classifications and associate specific metadata and forms to the document types. This means that business users are not presented with all metadata, but only the metadata relevant to the type of document being saved to WorkSite MP.

### **Microsoft Visio**

WorkSite MP Office Integration will be expanded to include integration to Microsoft Visio. Users will be able to Open, Save and Import files directly within the Visio Menu system. Please note that the 'Active' integration is not available for the Microsoft Visio integration.

### **Microsoft Project**

WorkSite MP Project Integration allows users to Open, Save and Import files directly within the MS Project client. Store, share, and version MS Project files easily within WorkSite MP. Please note that the 'Active' integration is not available for the Microsoft Project integration.

### **Adobe Acrobat**

WorkSite MP Adobe Integration allows users to Open, Save, and Import files directly within the Adobe Acrobat and the Adobe Acrobat Reader client. Easily collaborate and share pdf files without having to leave the Acrobat client. This is especially useful in Accounting and other applications that integrate with other enterprise systems because those systems typically provide reports in PDF format. Now, a user can quickly and

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easily save that PDF report into the related workspace in WorkSite MP. Please note that the 'Active' integration option is not available for the Acrobat product.

### **Active Office Integration**

WorkSite MP Office Integration now supports an "active" Office integration where the Open and Save menu options within the Office > File menu interact directly with the WorkSite MP repository. This promotes use of the WorkSite MP repository for enterprises concerned about the storage of corporate files on individual desktops machines. It is still possible to install the "passive" integration which installs with the WorkSite MP menu options "Save to WorkSite" and "Open from WorkSite" rather than replacing the existing Office menu options.

### **Windows Explorer Context Menu Integration**

WorkSite MP 5.0 is introducing an Office integration option to install a Windows Context Menu integration point where individual files can be imported to WorkSite MP directly from the Microsoft Windows File Context Menu.

### **Kofax Integration**

WorkSite MP Kofax Integration provides the ability to incorporate bulk scanning into the WorkSite MP implementation. Scan images can be placed into specific WorkSite MP locations or dynamic locations based on metadata captured as part of the scanning process.

### **MAC Web Client**

WorkSite MP will now support use of the Web client on MAC computers. Please see the Compatibility section of this document for more information.

### **Office 2007 and Vista Certification**

WorkSite MP 5.0 will support Office 2007 and Vista at the time it is released. WorkSite MP 5.0 Web Client and server will be Office 2007 file compatible when they release by end of March. Users will be able to import, checkout/in, download, and search Office 2007 files. The WorkSite MP 5.0 Office and Outlook integration clients will fully support Office 2007 and Vista when they release by end of June.

## **Enhancements**

### **Drag and Drop within Notes Integration**

WorkSite MP Notes Integration will provide a drag-and-drop, explorer-like tree for improved access and interaction with the WorkSite MP repository. Easily import email, attachments, access shared content from WorkSite MP and incorporate enterprise collaboration and document management into your Notes client.

### **Copy and Move Scope**

WorkSite MP 5.0 supports copying and moving content across WorkSite MP WorkSpaces. Where previously content had to be re-imported, now users can easily copy or move files or folders to new locations to properly reflect changes in business processes or organizations.

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## **Search Improvements**

Users get access to the correct content faster with relevance-ranked full text search results. Previously, search results were ranked by relevance, but separated by WorkSpace specific groupings. WorkSite MP 5.0 no longer breaks the search result rankings into the WorkSpace groupings so business users are more likely to get to the asset they are seeking on the first page of results.

In WorkSite MP 5.0, search results now provide a document briefing with term hit highlights. When a full text search is performed, if the search term is found in the body of the document, a two line document section that includes the term hit is provided inline with the search results. This also helps business users find the correct document.

Users will also be able to export search results, not the actual data, but the document list view and profile metadata for any asset to which they have been given access. This exported result can then be used for reporting or analysis or documents created by specific users, documents modified recently, and other repository review criteria.

## **Web Client Improvements**

WorkSite MP 5.0 has an updated Web Components client which makes frequently accessed content more readily accessible with a WorkSpace tree view and faster access to Quick Links, and My WorkSite. A redesigned menu system and updated look and feel improve the usability and appeal of the client overall.

## **Hierarchical Subscription and Favorites List**

Users can organize their subscription and favorites lists by building folders and subfolders that fit their needs. This will help users keep better track of their WorkSpace projects and make their current work easily accessible.

## **Email Addressable Folders**

Assign an email address to any WorkSite MP Document Folder and users can email content directly into the WorkSite MP repository. Users are no longer tied to a separate Inbox folder for storage of emails sent to the repository. Now content can be emailed into Document Folders and be better incorporated into the project work and context.

## **Email Duplication Detection**

Any email that is uploaded to a Document Folder will be verified to be unique. If the email has already been uploaded into this Document Folder, the user importing the email will be notified that it is a duplicate. This will prevent the storage of duplicate emails. For an email to be considered a duplicate, it must be the same version of the same email. Subsequent emails of the same subject will not trigger the duplicate email notification.

## **HTML Email Notifications**

WorkSite MP email notifications will now be HTML emails. This allows an improved user experience with the received notifications and it allows for a greater degree of customization. The collection of HTML email notification templates can be customized at the WorkSite MP cluster level.

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### **Apply Profile to All**

When a user imports a group of files to WorkSite MP via one of the desktop integration clients, and the profile can be applied to all files being imported. This can be a valuable time-saver in cases where a description or an import comment or even a metadata field should be the same for all files being imported. This will save users work and allow them to properly profile documents without having to individually fill out a unique profile for each file.

### **Default Profile**

In WorkSite MP 5.0, each Document Folder can have a default Document Type and Profile defined so that from any WorkSite MP client (previously this was only supported in the web client), documents imported to the folder can have a specific set of profile information or metadata assigned without the business user having to enter that information for each imported file. It saves the business user time and helps improve accuracy of the information tracked for imported documents. Please note: each folder has an independent profile and there is no parent-inherited folder, project, or Workspace profile information.

### **BEA WebLogic Express**

WorkSite MP will bundle BEA WebLogic Express with WorkSite MP 5.0. Customers now get a superior enterprise application server to support their WorkSite MP implementation. The improved configuration and diagnostic tools will reduce effort and total cost-of-ownership IT must invest into managing the team Collaboration and Document Management needs for their organization.

### **WorkRoute Forms**

WorkRoute MP forms will now be managed within the WorkSite MP Web Components Configuration tools rather than the separate WorkRoute MP Forms Designer environment. This will simplify the number of administrative tools required to implement workflow and BPM with WorkSite MP. It will also reduce the training required since the Web and the WorkRoute forms will now be built using the same configuration tool.

### **WorkSite MP Communication Service**

WorkSite MP will offer a Communications Service for inbound email content to be routed to WorkSite MP for accounts that use Exchange or Domino for email. There is improved error handling and consistent folder email format enforcement.

The process and implementation for Exchange configuration is fairly consistent with previous releases, but there is a much improved configuration process for Domino customers. WorkSite MP Communication Service will simplify the deployment of inbound email routing via Domino to WorkSite MP Document Folders, it will store emails as Notes appropriate formats to business users can interact with them as emails, and it will support Domino mail domain handling which maintains Notes specific look and feel of content (no translation to HTML or mime-types).

### **Application Sets**

The capability previously called "View Sets" is now called "Application Sets" or "App Sets". Application Sets define the data model, captions, required fields, and

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components that will be displayed to business users. While previously View Sets controlled fewer cross-client attributes, App Sets provide the means to define the captions and required fields across web and desktop integration clients. This simplifies IT administration and guarantees data consistency for required fields across user clients.

### Internationalization & Localization

WorkSite MP 5.0 will support the internationalization of some additional integration clients and components so that globally distributed business users are presented with a localized client option. The WorkSite MP Office and Outlook integration clients will be internationalized, meaning they are tested for use with international characters and operating systems. WorkRoute will also be internationalized which will make the WorkSite MP product offering completely internationalized.

WorkSite MP 5.0 will be localized to German (web only), French (web only), Japanese, Chinese (standard), and Chinese (traditional).

### Compatibility

To increase the ease of deployment, WorkSite MP supports a wide selection of platforms. An overview of compatible platforms\* is provided below:

- WorkSite MP 5.0 runs on versions of Windows, Solaris, and Linux.
- Supported Databases include Microsoft SQL Server and Oracle.
- BEA WebLogic, IBM WebSphere, and Apache TomCat supported Application Servers
- Apache HTTP Server and Microsoft IIS are supported Web Servers
- Client Operating System options include Windows (integration clients and web client options available) and Macintosh (web client option for the Mac)

\*Please review the product release notes, the WorkSite MP 5.0 Supported Platforms Datasheet, and the WorkSite MP Server Installation Guide for compatibility details and information regarding specific product releases, platforms, databases, and locales.

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