

Refiling Module



DocAuto's Refiling Module moves metadata and security refiling to the server side, eliminating user confusion and frustration with tedious desktop refiling. This solution simplifies your users' day to day experience and helps enforce the consistent application of metadata and security policies, all while preserving audit trails and improving the performance of your iManage Work Servers.

Advantages

- Refiles metadata and/or security as documents are added to, or moved between, folders or WorkSpaces
- Comprehensive compliance refiling of all WorkSpaces, folders, and documents
- Tracks metadata and security changes in document history, providing auditing using native iManage Work capabilities
- Filters WorkSpaces, folders, or searches by any combination of metadata, security, or parent-child relationships between structures
- Changes metadata values (search parameters) on searches when needed
- Pushes security changes to all structures and all documents within a WorkSpace
- Permits documents existing in multiple folders to have "accumulated" security in order to ensure compliance with all ethical wall and other security requirements simultaneously
- Controls which metadata fields are changed on documents or structures, when, and why
- Excludes specific users or metadata changes from history tracking when needed
- Allows custom additional security ACLs to remain on documents after refiling

User Value

- Improves the performance of iManage Work servers
- Enforces consistent application of metadata and security policies
- Preserves audit trail by recording changes in document history and/or external databases
- Eliminates failure-prone and tedious client-side refiling
- Removes all user prompts for refiling, eliminating the need to train users on refiling complexities
- Automates refiling with no end user action required
- Includes the scheduling, centralized maintenance, and distributed processing power of the DocAuto Server platform

More information can be found on DocAuto.com or by contacting Sales@DocAuto.com

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