

# Enterprise Document Management

## Interwoven WorkSite MP Comes to NYU

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Document management at NYU will soon be reaching a new level of efficiency, one department at a time. ITS has begun collaborating with University academic and business offices to provide customized implementations of Interwoven WorkSite MP, an enterprise document management system.

A document management system, or DMS, is a system for the electronic scanning, storage, retrieval, sharing, tracking, revision, and distribution of documents and the information they contain. A DMS provides many benefits — it frees up floor space, centralizes document storage for easy retrieval and administrative efficiency, securely stores sensitive data, and reduces paper costs and waste.

### An Enterprise DMS

A recognized need for an enterprise-wide DMS at NYU emerged several years ago. It was impelled in part by the University's "green" efforts to reduce and eliminate paper wherever possible, but the management of paper documents was also becoming increasingly unwieldy,

and for many departments, the very floor space required for the storage of paper files had become a scarce and precious resource. While the University's Office of Legal Counsel initially provided the impetus for acquiring such a system, it was soon recognized that other departments within the University would also benefit from a DMS. A task force was formed, representing many academic and administrative units across the University, and Interwoven WorkSite MP was ultimately chosen as NYU's enterprise DMS.

Not only does WorkSite make sharing and collaborating on documents more manageable — with features such as "check-out" and "check-in" (which restrict document update access to one person at a time, by requiring them to check the document out of a repository), document version control, tracking, expedited retrieval, a friendly interface, and Windows-style file organization — but it can also ultimately alleviate the use of shared departmental network drives.

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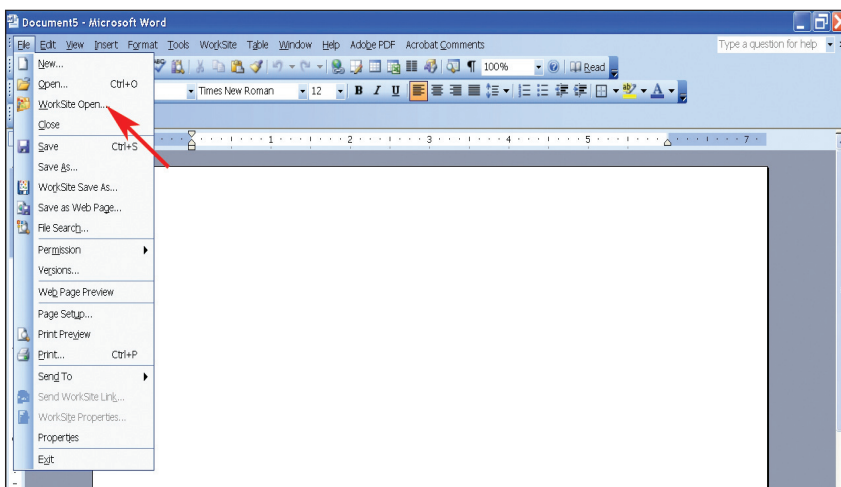


Figure 1. Documents stored in a WorkSite repository can be opened directly from within Microsoft Office software or Adobe Acrobat running on a Windows computer on which the appropriate integration software has been installed. (Worksite's web interface supports both Windows and Macintosh.)

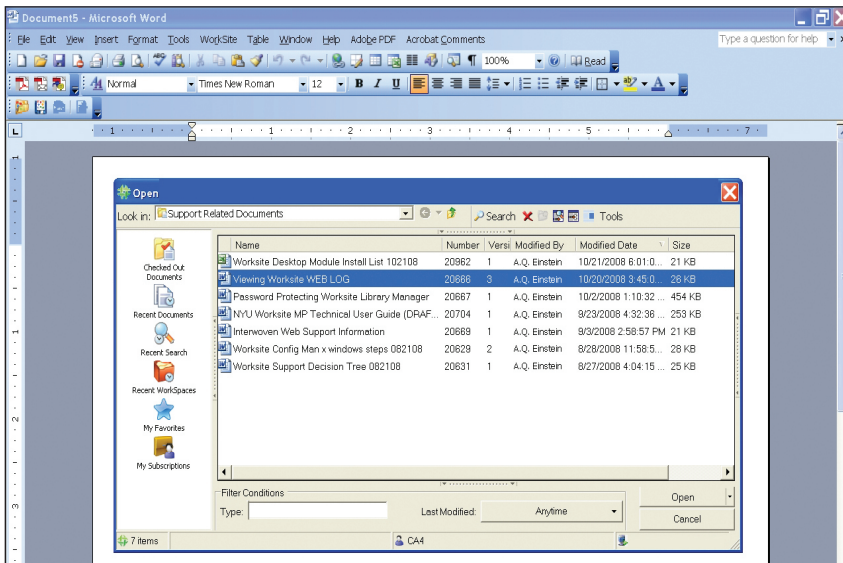


Figure 2. Once “Worksite Open” has been selected from the menu (see Figure 1), a Worksite dialog box very similar to that of Word enables you to navigate to the file within the Worksite repository that you wish to open.

WorkSite MP’s familiar and easily navigated Windows-like file organization is also highly customizable, allowing departments to create folder structures and folders that closely accommodate their needs. Moreover, through the use of metadata (definitively, data about data), departments working with ITS create document and folder properties specific to their business needs, such as Project Number and Title, Review Date, NYU ID, and more. These properties, in turn, are used to optimize the process by which department staff search for and retrieve documents stored in the system. The ability to customize metadata is particularly valuable to groups with highly specialized business processes and information. WorkSite can also store a very large variety of document types.

### Implementing a DMS for a Department

DMS implementations that are tailor-made to a department’s business processes and needs aren’t accomplished in a day. When

a department or school undertakes a WorkSite implementation, extensive preliminary procedures are begun, in collaboration with the ITS team. In the early stages, ITS leads a series of workshops to assist department staff in their consideration of such topics as taxonomy, metadata, document types, transition plans, and security policies, as they relate to the department’s particular business process. Eventually, the department will have a “facility” within WorkSite, to which only that department will have access. The results of these workshops and subsequent planning ultimately determine how the files within that department’s DMS facility will be organized, who has access to the various documents, and the metadata that will be associated with each document, so as to best facilitate the search and retrieval of documents.

Additionally, ITS works with the department to assess the quantity of existing files to be stored in WorkSite, those already in electronic format, as well as those that need to be scanned. This can

## Some Additional Benefits of a DMS

- The scanned files are secured from the effects of flood, fire, and other disasters.
- Using an enterprise DMS helps the University maintain compliance with governmental eDiscovery and record retention rules.
- By reducing the amount of paper used, it helps to “green” the University’s processes.
- Departments working with ITS to implement a DMS are able to reexamine their business processes for opportunities to improve efficiency and reduce their dependency on paper.

require a lot of thought and analysis. Consider, for example, all the papers in filing cabinets and the email messages that a department might wish to collect and store, not to mention all the electronic documents on individual and shared network drives. Next, a process is devised for getting the electronic files into WorkSite and scanning the paper files, so that they too can be added to the department’s WorkSite facility. For those departments with a large volume of paper “backfile,” NYU has a master contract with an imaging company that can do the scanning for them. For departments with smaller amounts of paper to be processed, NYU Copy Central has the means to do the scanning for them, and is an option to be considered.

Once the department or school is set up with WorkSite, people can interact with their documents in the repository in two ways. The first is

through WorkSite's web interface, using either a Windows or Macintosh computer and an appropriate browser. A second way is through a Windows-only software client that enables seamless integration with the suite of Microsoft Office products, including Outlook for email messages and attachments, as well as Adobe Acrobat. This integration allows a departmental staff member to retrieve and store documents in the WorkSite repository directly through the Microsoft Office or Adobe Acrobat software open on their desktop computer.

As the need for more space, security, and efficiency increases, document management will continue to be an important component of doing business at NYU. If you are interested in learning more about WorkSite, please send email to *document.management@nyu.edu*. §

## Selecting a File Storage Solution

ITS offers a variety of departmental file-storage and -sharing solutions. Webspaces, for example, may be a good choice for departments that need a space for ad hoc storage, and prefer a flexible, more self-service model of organization and access.

While WorkSite also permits ad hoc creation of folders, it is within a well-planned and -articulated framework and structure. Thus, WorkSite may be the better choice for a department that is looking to "get organized" and/or requires a file organization that reflects its business process and structure. To read more about individual file storage and sharing using Files 2.0, see page 19. For an overview of the file and data management services highlighted in this issue of *Connect*, see the Afterword on the inside back cover.

ITS is happy to work with you to find the right solution to fit your departmental, research, or individual needs: please visit [www.nyu.edu/its/filestorage](http://www.nyu.edu/its/filestorage) or send email to *AskITS@nyu.edu* to arrange a consultation.

## NYU's DIAL Modem Service To Retire in January

Due to the widespread availability of residential broadband data services (e.g., cable and DSL), the use of NYU's DIAL modem service to connect to the NYU network has decreased sharply over the past several years. Maintaining DIAL service is costly, particularly as its usage declines and the underlying technology ages. As a result, ITS will be retiring DIAL service on Tuesday, January 20, 2009.

ITS has contacted all students, faculty and staff members who have used NYU's DIAL modem service to connect to the NYU network within the last six months, to let them know of this service change. Over the next several months, we will be sending these individuals additional information about DIAL's retirement and dial-up alternatives which they may choose to use.

If you currently use DIAL service, please be assured that, prior to this service's retirement, we will provide you with as much information as needed to make your transition as smooth as possible. Please check [www.nyu.edu/its/nyunet/dial](http://www.nyu.edu/its/nyunet/dial) for updates, and feel welcome to contact ITS Client Services (1-212-998-3333 or *AskITS@nyu.edu*) should you need additional information or help. §