



# Structure/Presentation

## Refiling Server / Refiling Server Enterprise

The optimal tool for finely-controllable server-side refiling in WorkSite.

Replace inefficient, arbitrary, and possibly dangerous user-controlled desktop refiling with faster, more efficient, more powerful server-side refiling.

Refiling Server allows documents to be refiled as they are added to or moved between folders by any means, with very precise management of:

- Which documents are processed
- Which metadata fields are processed
- Whether or not security and/or metadata are processed
- What happens to documents that exist in multiple locations
- History and data tracking of all changes made to documents
- Capturing refiling changes in a database for cradle-to-grave refiling reporting

The benefits to you:

- Improves performance of WorkSite servers
- Enforces consistent application of metadata/security policies
- Preserves audit trail – record changes in document history and/or external databases

With fast, consistent and efficient options for managing how, when and why items are refiled, Refiling Server optimizes system performance and increases control.

Refiling Server Enterprise extends these refiling capabilities to matter-centric structures:

- Which WorkSpaces, Tabs or Folders are processed
- Control which structural metadata fields are refiled, including how and when
- Filtering on initial structures and substructures to be refiled
- Refiling of user-created structures

Implementing Refiling Server lets you –

- Take the burden of refiling decisions off the user desktop and put it on the server for more efficient processing
- Continually monitor any number of WorkSite servers and databases and manage all refiling processes
- Automatically refile WorkSite content with proper security and metadata
- Process documents in multiple folders, with flexibility to combine security from multiple locations

DocAuto provides a comprehensive suite of software solutions for Autonomy iManage WorkSite that reduce risk, improve user experience, and optimize performance.

Trusted by hundreds of firms worldwide, DocAuto provides industry-leading software, domain expertise, and dedicated customer service.

Founded in 1997 and an iManage Developer partner since 1999, DocAuto is the leading provider of enhancements for Autonomy iManage WorkSite that make matter-centricity easy, flexible, and secure.

Learn how you can rely on DocAuto to help you.



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