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*From the July 2009 Review of [Document Management Systems](#)*

Since

our review last year, Interwoven was acquired by Autonomy, a worldwide enterprise with \$4 billion market capitalization, 20,000 customers and 2,000 employees. Worksite is currently in use at 11 of the top 30 U.S.-based accounting firms. So clearly you have a large organization with the depth of resources to support some of the world's largest accounting firms. However, WorkSite is deployed in many small and midsize firms, as well, and their target market is firms with staff sizes of 20 to 30 and up.

**USABILITY:**

The most distinguishing attribute of WorkSite is the way it is integrated into the Outlook folder navigation panel. There are some significant benefits to this approach. Email has clearly become the predominant means of exchanging information with clients, colleagues and third parties. Therefore, having direct access to your files from the same panel you use to organize your e-mail offers some real efficiency gains, in addition to the email management benefits.

Your WorkSite database is accessible as a virtual mail folder in Outlook with sub-folders organized by client and additional sub-folders within each client. Once you navigate to the desired folder, a hit list of the documents and files is displayed in a separate window on the top half of the screen. On the bottom half of the screen, a tabbed window displays the document profile information, a quick view document preview, document version history, a list of related documents

and a document activity audit trail. Overall, it is an intuitive and well organized

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folder works).

Another unique feature coming soon is the capability to access WorkSite just like a mapped network drive. This enables virtually any application to access content directly through the Windows open and save dialogs, as well as Windows Explorer. You can search for files from the Windows Desktop using a Google-like search box, or from any WorkSite interface based on an extensive set of parameters including the document metadata tags, keywords, email properties, document text, etc.

#### **INTEGRATION:**

Autonomy is dedicated to developing the tools and systems to manage unstructured content, such as documents, files, images, video files, audio files, email, etc. WorkSite is just one of the tools the vendor offers in this endeavor. Autonomy has integrated WorkSite with its Enterprise Search, BPM Workflow, and Archiving solutions. And as time evolves, they will be developing additional integration between WorkSite and their other content management tools.

WorkSite currently offers direct integration to Outlook, as well as the other MS Office applications, Adobe Acrobat, MS SharePoint and the Records Management module for automated document retention. In addition, they have developed direct integration with Caseware working papers software and various practice management systems. A comprehensive web portal solution and workflow capabilities are also included.

#### **RELATIVE VALUE:**

WorkSite is a solution around which you can develop a long-term content management solution. You can start with a relatively basic deployment and then build onto

it at a pace that is compatible with your culture and budget. WorkSite pricing

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