



ConVerge® Foundation provides core, configurable, content management functionality that extends the out-of-the-box Microsoft® SharePoint® 2010 platform, including document numbering, document auto location and dynamic folder creation, enhanced document auditing, extended document permissions, relationship management, and template management. ConVerge Foundation is available as a single module or as part of the ConVerge Compliance platform.

## Document Numbering

Organizations have complex document numbering schemes that must be followed. In order to alleviate manual intervention, SharePoint 2010 includes a new feature called Document ID that, when enabled, assigns unique IDs to documents in a site collection. The Document IDs can be used to retrieve items independent of their current site or library location.

ConVerge Document Numbering is used in conjunction with the SharePoint Document ID feature to provide site level configurable automated numbering functionality that accommodates complex document numbering schemes including prefixes, suffixes, and incorporation of document information. Through pre-defined rules based on document content type and metadata, numbering schemes can be created without programming, and ConVerge ensures that duplicate numbers are not inadvertently used.

## Document Auto Location & Dynamic Folder Creation

Users are not always aware of the business rules for properly filing documents in a regulated content management system. As a result, users can inadvertently create and store documents in improper locations. SharePoint 2010 includes a new feature called Content Organizer, which was introduced from the MOSS 2007 Records Center functionality.

ConVerge automatically locates documents through pre-defined rules based on document content type and metadata when documents are created or imported, when document metadata is modified, and when a document transitions lifecycle states (if ConVerge Lifecycle Management is utilized). Location schemes can be created without programming. In addition, ConVerge dynamically creates folder(s) for a document if those folders do not already exist.

## Enhanced Document Auditing

Auditing of activities is an essential component of content management systems to maintain global regulatory compliance requirements. SharePoint 2010 provides the ability to audit many events. These events are configured at the site collection level for all documents within all sites. An option does exist to attach a policy to a specific content type within a site to perform auditing at the site level. Similar events are grouped into a single configuration. SharePoint also offers the ability to report on all documents within a site for specific events.

ConVerge extends native SharePoint auditing by providing additional auditable events and exposing native discrete events beyond the out-of-the-box event groups through pre-defined rules based on document content type and metadata. Auditing rules can be created without programming. In addition, a user-friendly audit trail view for any document in the system is offered.

## Relationship Management

Users must be able to establish and maintain relationships between documents in order to understand the impact of change for regulated documents. Document relationships provide many other benefits, including the ability to search and view related documents, to promote related documents, and to send notifications on lifecycle state changes for related documents.

ConVerge provides the ability for users to manage relationships between documents. ConVerge offers a mechanism to configure pre-defined rules as to which relationships can be established and which users are allowed to establish relationships.

## Extended Document Permissions

Organizations require implementation of various security schemes that support dynamic creation and management of permissions. SharePoint 2010 provides the ability for documents to inherit permissions from a site, library, or folder. Additionally, security can be manually applied to individual documents.

ConVerge facilitates management of automated security and individual document access through pre-defined rules based on document content type and metadata. This feature increases usability and enhances maintainability.

## Template Management

ConVerge ensures that documents are created from current, approved templates. Templates are authored or imported only by appropriate users. Lifecycles and approvals can be applied to templates if ConVerge Lifecycle Management is implemented. ConVerge ensures that the right users are keeping templates up-to-date, and that the templates are delivered to the user community on a real-time basis.