ConVerge® Lifecycle Management extends the out-of-the-box Microsoft® SharePoint® 2010 platform by providing the ability to apply lifecycle states to documents and transition documents through their lifecycle by invoking workflow activities with pre-configured workflows commonly used in many implementations. Also included is advanced versioning functionality, periodic review, retention management, and enhanced notifications.

Lifecycle & Workflow Features

- ✓ Configurable definition of document lifecycles and their states
- ✓ Advanced document versioning
- ✓ Supporting workflow activities
- ✓ Pre-configured workflows
- ✓ Automated promotion for documents based on pre-defined criteria
- ✓ Ability to purge minor versions of documents

Periodic Review Features

Organizations must ensure that documents are reviewed periodically in accordance with governing SOPs. ConVerge offers the following periodic review features:

- ✓ Automated calculation of periodic review cycles through pre-defined periodic review policies based on document content type and metadata
- ✓ Identification of documents approaching their periodic review dates with notifications sent to a configurable set of users to facilitate review. Notification criteria and messages are configurable

Retention Management Features

Organizations must ensure that documents are retained, archived, or destroyed in accordance with governing SOPs. ConVerge offers the following retention management features:

- ✓ Automated calculation of retention dates though pre-defined retention schedules based on document content type and metadata
- ✓ Identification of documents approaching their retention dates with notifications sent to a configurable set of users to facilitate review. Notification criteria and messages are configurable
- ✓ Ability for specified users to extend the retention of individual documents
- ✓ Capability for specified users to place groups of documents on hold for product litigation so they are not deleted
- ✓ Retention schedules that stipulate policies for confirmation prior to deletion and automated purging of expired documents confirmed for deletion

Enhanced Notifications Features

ConVerge provides the ability to send notifications for certain events in addition to workflow assigned tasks. Notification criteria and messages are configurable based on document content type and metadata. Events include:

- ✓ Lifecycle state transitions to a document
- ✓ Lifecycle state transitions to a related document
- ✓ Periodic review
- ✓ Retention review