

2007 Microsoft Office System Solutions

Compliance

Meridio and Workshare Solutions Aid Compliance Through Integration with the 2007 Microsoft Office System

Regulatory compliance is not an option for businesses. Virtually every organization, regardless of industry or geography, must comply with government and industry mandates—European privacy directives, state and federal privacy laws in the U.S., and legislation such as the U.S. Sarbanes-Oxley Act of 2002, the Health Insurance Portability and Accountability Act (HIPAA), the Gramm-Leach-Bliley Act of 1999—all carry serious financial penalties for noncompliance.

Unfortunately, compliance can be complex and costly for businesses, and industry standards and corporate quality initiatives often require verifiable compliance with the provisions of legislation.

Microsoft and its partners not only help organizations fully comply with mandated regulations and standards, they make compliance an intuitive, efficient part of everyday processes and operations by building compliance solutions into the productivity tools people work with every day. Organizations can use familiar Microsoft® Office technology to transform their business practices into a culture of accountability. Within a company's governance plan and objectives framework, existing technology investments can make a substantial contribution toward realizing compliance and enhancing the excellence of all business activities.

Workflow and Process Controls

Microsoft Office SharePoint® Server 2007, together with other tools for the 2007 Microsoft Office system, provides a unified

infrastructure to build documented workflows that structure and track a company's completion of compliance efforts and exert consistent control over compliance-related documents and reports. As part of a Microsoft-enabled compliance environment, workflows help ensure that the right action is taken at the appropriate time and that all process steps are documented. Workflow tools also can automatically initiate responses to reportable events.

Rights Management and Content Control

The Information Rights Management (IRM) capabilities and policy controls in the 2007 Microsoft Office system help organizations safeguard digital information from unauthorized use. Through integration with Windows Rights Management Services, IRM enables information workers to define exactly how recipients can use the information contained in Office documents.

Organizations can create custom usage policy templates that can be applied directly to information such as financial reports, product specifications, customer data, and e-mail messages. Organizations can create policy statements for specific e-mail message types, and embed these statements in the message. Policy statements can instruct the reader how to handle the e-mail message content or serve as a flag to trigger Microsoft Exchange Server to process the message using custom-defined rules.

Document Management and Archival

Company intranet and extranet sites built on Office SharePoint Server 2007 can be the repository for compliance documents,

available to a company's financial managers, auditors, and others in a highly secure manner for efficient, collaborative review and decision-making. Employees can report and analyze compliance and financial information by using Microsoft Office Excel® 2007, create compliance documents in Microsoft Office Word 2007, manage related communications with Microsoft Office Communicator 2007, and send e-mail messages in Microsoft Office Outlook® 2007.

The Microsoft partner community has played a significant role in helping businesses to address their unique challenges in realizing compliance. Partners have enhanced corporate compliance efforts by supporting documentation and information management, process automation and workflow, monitoring and reporting, and communication and collaboration. Partners incorporating the 2007 Microsoft Office system in their compliance solutions and services include:

- » **Meridio**, whose solutions facilitate enterprise document and records management.
- » **Workshare**, which helps businesses maintain security and control of compliance processes and content.

For more information on Microsoft Office compliance solutions, visit www.microsoft.com/office/solutions/

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Meridio Builds Its World-Class Content Management Tools Exclusively on Microsoft Technology

Meridio offers Enterprise Content Management (ECM) and enterprise Document and Records Management (eDRM) solutions based exclusively on Microsoft® products and technologies to large companies or government agencies that need to manage documents or records in accordance with regulatory or industry standards.

Meridio solutions enable senior executives responsible for compliance, privacy, or intellectual property to ensure that corporate information assets are held securely for collaboration and quick retrieval, while complying with legal or regulatory retention requirements. Effective information management improves profitability, mitigates risk, and reduces the costs of corporate governance within the enterprise.

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*Patrick McGartland,
Vice President of Corporate Development,
Meridio*

Seamless Compliance

The Meridio eDRM solution automatically stores documents, e-mail, and other forms of content in a database using Microsoft SQL Server™, indexing both the content of the file and the metadata. In addition, eDRM also stores a copy of the content in its original form to meet international records management standards. Meridio's solution is closely integrated with the 2007 Microsoft® Office system user interface. End users can seamlessly comply with enterprise records management policies from within the familiar Microsoft Office desktop environment.

With the release of the 2007 Microsoft Office system, integration between Meridio solutions and Microsoft Office programs has become even stronger. A single Meridio content repository can now function "behind the scenes" to capture and maintain multiple forms of content, including Microsoft Office Outlook® e-mail messages, Microsoft Office Word documents, or Microsoft Office Live Communications Server instant messages.

Content Starts in Microsoft Office

"Microsoft Office Word and [Microsoft Office] Outlook create 80 to 90 percent of the unstructured content that becomes a corporate record. So if you want to look at enterprise-wide content management or records management, that's where you start," says Patrick McGartland, Vice President of Corporate Development for Meridio.

About Meridio

www.meridio.com

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Meridio is a Microsoft Gold Certified Partner with an Information Worker Solutions Competency and a member of the Office 2007 Technical Advisory Council. Based in Northern Ireland, with offices in the UK, Europe, and North America, Meridio has U.S. headquarters in the Boston area.

Meridio provides enterprise organizations that use Microsoft technology for their IT infrastructure with solutions for managing documents, records, and other electronic content.

"Microsoft Office SharePoint Server 2007 provides the front end for Meridio to manage and enforce any content-management policy an enterprise might need."

Meridio eDRM solutions offer complete life-cycle records management, from creation and retention, to destruction. Meridio enables customers to locate and retrieve corporate information content when it is needed. In addition, the solution gives customers documented, auditable proof that they are managing their information in accordance with specific industry, government, or international standards.

Workshare Ensures the Safety, Security of Outbound Information in All Forms

The increasing use of e-mail, instant messaging, Web-based e-mail, peer-to-peer file transfer, and portable devices creates a grave threat to corporate information security. Workshare Technology offers outbound content compliance solutions to large and small organizations in any industry that face regulatory compliance or litigation risk if their information security fails.

With the average cost of a data leak approaching US\$5 million, according to some estimates, the need for a solution is paramount.

The Enterprise Suite version of Workshare Protect allows enterprises to communicate freely with customers, suppliers, and partners without the risk that valuable information will be lost or that customer privacy will be breached.

Electronic Policy Enforcement

The Workshare Protect Enterprise Suite provides companies with electronic policy enforcement over all forms of external communication. The Workshare solution also prevents information leaks when employees, either inadvertently or maliciously, try to send information outside the company that might violate company policy, compromise

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Joe Fantuzzi, CEO, Workshare

company intellectual property, or break industry or government regulations.

The Workshare Protect Enterprise Suite analyzes content on the fly—as it is being created or copied—for compliance with both internal policies and external requirements. If the analysis suggests that the content has information that needs to be protected (for example, content that violates any of a myriad government regulations, such as the Sarbanes-Oxley Act, Basel II, the Gramm-Leach-Bliley Act, European privacy directives, or the privacy laws of 32 U.S. states), the Protect Enterprise Suite alerts the user to the risk and then automatically removes the risk or protects the content. “We’ve learned how to make these alerts so intuitive and non-intrusive that we remove risk *and* maintain business productivity,” says Joe Fantuzzi, CEO of Workshare.

Auditable Proof

The Workshare solution also provides companies with auditable proof that they are enforcing their stated policies, which can be important in resolving regulatory or legal questions. “Workshare allows organizations to actually operate the way they say they operate, by enforcing policies to prevent confidential information loss and to audit information flows required for regulatory compliance. That’s a huge benefit,” Fantuzzi says. Workshare uses Microsoft® Office SharePoint® Server 2007 and the new SharePoint Enterprise Search feature to create a “Compliance Indexer” that rates all of the organization’s content against selected regulatory requirements. This allows companies to enforce management policies more efficiently and at a lower cost.

About Workshare

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Workshare Technology is a Microsoft Gold Certified Partner and is a member of the Office 2007 Technical Advisory Council. Headquartered in San Francisco, Workshare has offices in New York, London, Paris, and Sydney. Workshare delivers award winning products to 5,500 customers in 65 countries through a network of channel resellers and ISV partners.

Workshare solutions provide secure content compliance that combines policy enforcement, management control, and user education with an emphasis on outbound content and protecting customers against accidental or malicious release of valuable information or intellectual property.

Rather than build proprietary or custom solutions to address customers’ needs, the Workshare Protect Enterprise Suite also relies heavily on the 2007 Microsoft Office system and Office SharePoint Server for functionality such as workflow, incident management, business intelligence, and information rights management.

Workshare gives companies an effective, easily managed way to ensure the safe exchange of information without disruption to their business.