



Wrapsody

White Paper

INTELLIGENT DIGITAL DOCUMENT PLATFORM



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Introduction

Every company faces constant challenges with managing the information that its employees generate. The ubiquity of devices and increasing availability of low cost storage encourage people to generate unprecedented numbers of copies of the files they create – many of which they don't even realize they are creating.

To manage all this information, several tools exist: email, content management systems, file servers, cloud storage, enterprise messaging and social networks, and many others. All of these can be valuable, but they have limitations. Multiple versions of files proliferate throughout an organization, often without means of tracking them. Email messages are sent with file attachments that are also not tracked and sometimes not properly saved on employees' devices. Multiple people will revise documents in parallel, leading to conflicts and lost changes. The ability to search across multiple copies and versions of files is often limited, as is enterprise-wide file search in general. Standard tools rarely give organizations the ability to monitor how documents and document templates are used over time.

Fasoo has introduced Wrapsody, a new approach to content management, to address these issues. Wrapsody is based on a file-centric approach: it links files with metadata to enable automated content synchronization and version control management beyond repositories, and to identify files wherever they reside rather than only being available within repositories that employees may use inconsistently.

Wrapsody ensures that all authorized users always have access to the latest versions of files. It puts sophisticated control over versioning, metadata tags, and workflows directly into the hands of users in addition to administrators. It provides an enterprise-wide view of document usage and modification history that helps companies to understand how information flows throughout their organizations.

This white paper describes Wrapsody, its features, functions, and technical specifications. It also discusses how Wrapsody differs from and complements other information management technologies, and presents typical use cases that other solutions don't address.

Background

Organizations today still have variety of issues and challenges managing documents, even though they have deployed Enterprise Document Management (EDM), Enterprise Content Management (ECM) or recently Enterprise File Sync and Share (EFSS). According to IDC, 48% of knowledge workers have emailed the wrong version of a file to a colleague or client, while 81% found themselves working on the wrong version by mistake. Also, many documents still remain unmanaged, and redundant copies can be found easily on servers and desktops. Numerous emails, messages and calls are exchanged just to find the right version of a file. As a result, huge amount of time and resources are being wasted in working on documents.

In order to manage objects effectively, the system requires information associated with each object. Suppose a farm is using automated system to package apples and oranges. Most likely, change of doing it right will require human input unless the system has a flawless artificial intelligence to differentiate its characteristic. However, if each fruit is labeled with tags, then the automated system should be able to package them into the relevant box without human interventions.

Perhaps, ECM and file-servers are no too different from these fruit boxes. Various documents are constantly being created, updated at desktop, and gets uploaded to repositories without any label, relying on users and assuming they are making a precise decision every time.

In reality, humans are not perfect, and it is impossible for systems to make an accurate decision with inadequate or sometimes no information for the documents. As a result, ECM and file-servers are often disorganized, fragmented and even redundant, making tough for organizations to construct a productive knowledge management infrastructure.

Information Management Challenges

Today's organizations devote a significant amount of effort creating, communicating, and collaborating on different types of documents using standard tools like Microsoft Office applications, email, messaging, social networks, and content management systems. Managing all of the information that these tools produce or share is a constant challenge. Organizations that limit themselves to standard tools face several problems in information management. Here are some examples of these challenges:

Version Proliferation

This is perhaps the most fundamental problem. Today's large hard disk drives and SSDs offer huge capacity, so that users don't think twice about creating arbitrarily many copies of documents. Yet whenever a new copy is made, it could end up being either the same as or different from the previous copy.

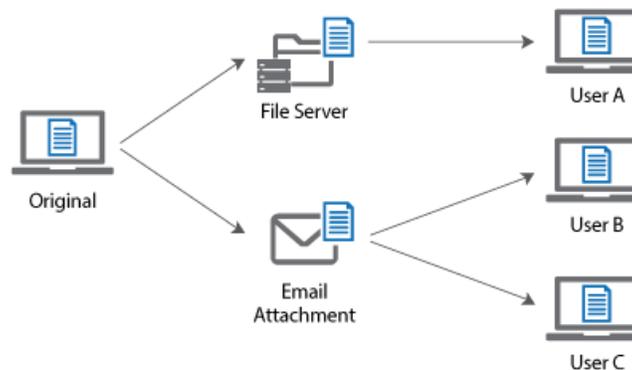


Figure 1: Version proliferation leads to multiple copies of files on users' devices.

Versions are not typically tracked or managed – and when they are, the process is cumbersome. As a result, users' devices can contain multiple versions of documents with no indication of which documents were modified, who modified them (based on which previous versions), and when they were modified. Some organizations use cumbersome, ad-hoc version management techniques through file naming conventions, which lead to cumbersome examples such as *ABC Corp Proposal v8.1 18-Nov-2015 JS changes FR edits.docx* – if they are used consistently or at all.

File Backup

Backing up and archiving digital assets is another obscure and vague issues of many organizations. Numerous backup solutions are user-dependent, and enormous amount of duplicated copies are stored at the servers, making impossible to identify and locate information when required. Also, poor backup

and recovery strategies could potentially bring devastating impacts to organizations from malware attacks like a ransomware.

Email Threads with Attachments

Email is the most popular method of sending documents to others for review and revision, and it's easy to attach files to email messages. People reply with additional copies of the same files – which, once again, could be the same as or different from the originals. Some users will remember to change the names of files when they revise them, while others will not.



Figure 2: Returned emails with attachments could contain files that have been modified or not.

If you send an email message with a file attachment and ask the recipient to edit the document and return it, then when he sends it back to you, you'll understand that it's an edited version of the document. But later on, it may not be easy to determine which email attachments are originals and which are modified versions. It is also difficult to know which version the revisions are based on and which users made the changes. You may save file attachments to folders on your device, or you may not – meaning that an important version of a document may be hiding in an email message attachment.

Parallel Editing

Further confusion can result when multiple users make changes to a document in parallel. It may be difficult for the person ultimately responsible for the document to incorporate multiple sets of changes; changes can be conflicting; and some changes may get lost in the process.

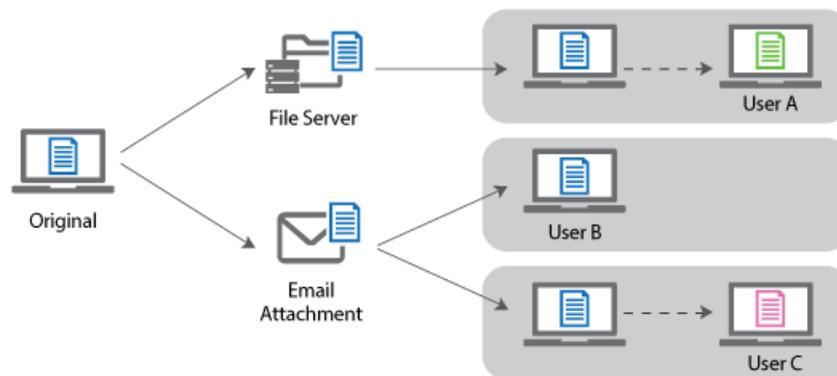


Figure 3: Parallel editing leads to potentially conflicting changes in documents over time.

Search

Today's personal device operating systems include functionality for searching through the text of many types of documents. But search on personal devices has several limitations. It's limited to the documents that are actually stored on the device, and possibly servers attached as logical extensions to the device (e.g. as network disk drives on Windows PCs), as opposed to on other users' devices or on servers. In addition, the scope of searching on personal devices is usually limited to filenames and document body text. Users also typically perform searches within folder hierarchies, meaning that they may miss relevant documents that are stored elsewhere.

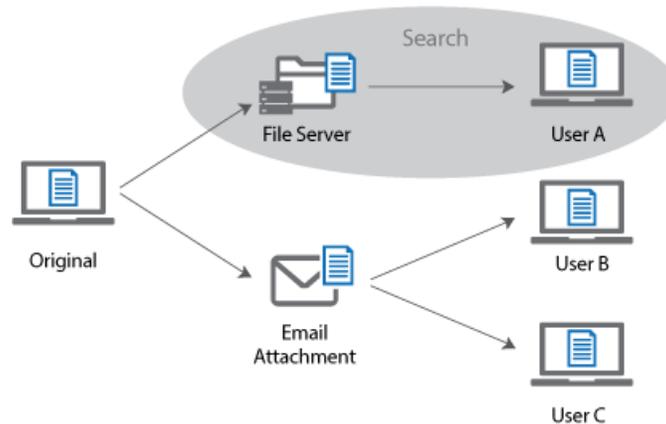


Figure 4: Scope of search is limited to a user's device and possibly logically attached file servers. Often users will only search within certain folder hierarchies on their own devices.

There is no easy way to search for text that may be in documents on other devices, and there is no way to define keywords that may capture the essence of a document better than the actual text when searched for at a later time. Finally, search results do a poor job of indicating the context of a document, such as whether it's the latest version or who modified it.

Solutions and Their Limitations

Several technologies exist that purport to solve problems in information management, such as those discussed above. As we will see, they can all be useful but have their own limitations.

Content Management

Content Management Systems (CMSs, also known as Document Management Systems or Enterprise Content Management (ECM)) have existed since the spread of client-server computing in the 1990s. CMSs involve storing documents on servers rather than on users' own devices. They typically use a library-style "check-out/check-in" metaphor: a user requests a document, and the CMS provides a temporary copy of the file. Then when the user has edited the document, he checks it back into the CMS, which typically means that the edited document is stored in the CMS as a new version. Many use a "hot folder" scheme whereby every file that a user moves into a specific folder is automatically checked into the CMS.

CMSs also maintain access privileges so that only certain users have the right to view or edit certain documents. Finally, CMSs store metadata with documents, so that users (or administrators) can assign keywords and values that facilitate searching and classification.

CMSs are very useful, but they have various limitations. One significant limitation is that they depend on continuous connectivity between users' devices and the CMS server. That may be a reasonable assumption within an organization's physical boundaries. But today's environment includes "BYOD" mobile devices, telecommuting, and the need to access important information on the road or from customer sites, all of which weaken the assumption of constant connectivity with corporate servers, even if they are in the cloud.

A more important limitation of CMSs is that they lose control over documents once users check them out. It is possible for users to check documents out of a CMS, modify them, and save them on local devices rather than checking them back into the CMS. In addition, metadata is only visible through the CMS; it is not associated with or contained in the file if it is checked out. And if a user modifies a file after it is checked out of a CMS, the metadata in the CMS may no longer reflect the contents of the file.

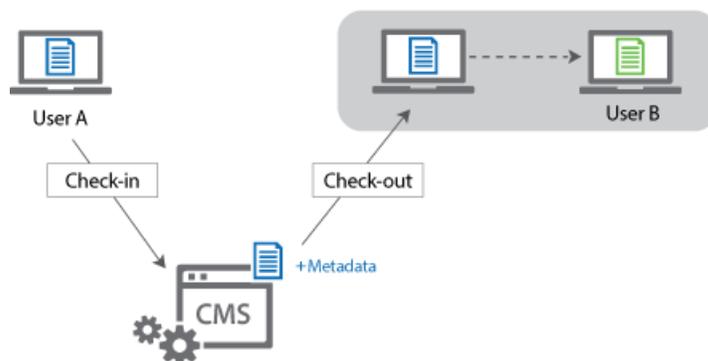


Figure 5: Content management systems control access to and versions of files and store metadata, but their effectiveness ends once a file has been checked out.

Cloud Storage

Cloud storage tools like Box, Dropbox, SugarSync, Microsoft OneDrive, and Google Drive are essentially file servers in the cloud with some content management capabilities, such as version control. They are very useful for making files available on any device at any location, and they can sync files on a user's device automatically so that the cloud versions are always up to date. But they do not automatically update copies of files that other users have made on their own devices, and they don't have the metadata or analytic capabilities of most CMSs.

Enterprise Messaging and Social Networks

Enterprise social networking applications like Slack, Yammer, Jive, and Socialtext can be great for streamlining communications and empowering teams. They typically enable sophisticated communication threads, and they can associate files and file storage systems with those threads instead of attaching files to email messages. But adoption of such tools can be far from universal. And even in organizations that use them pervasively, activity still takes place in files outside of these systems that are copied and distributed using traditional methods. Template-based project management tools like Podio and Confluence are similar in this regard.

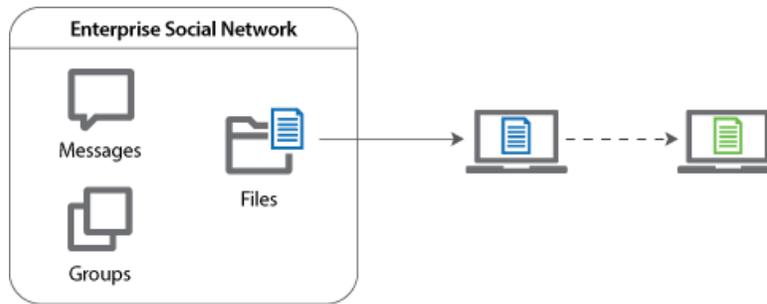


Figure 6: Enterprise social networks enable file uploads so that a group can easily access a user's file. But the user can modify the file outside of the enterprise social network.

Introducing Wrapsody

Fasoo Wrapsody addresses all of the above limitations. Wrapsody takes an entirely new approach to information management – one that is file-centric rather than message-centric (as in email attachments) or repository-centric (as in CMSs, cloud storage services, and even enterprise social networks). Rather than relying on a separate system for managing version control and metadata, Wrapsody builds the functionality into the files themselves, so that the functionality follows files wherever they go. Wrapsody files contain their own intelligence about versioning, user access, and access to metadata.

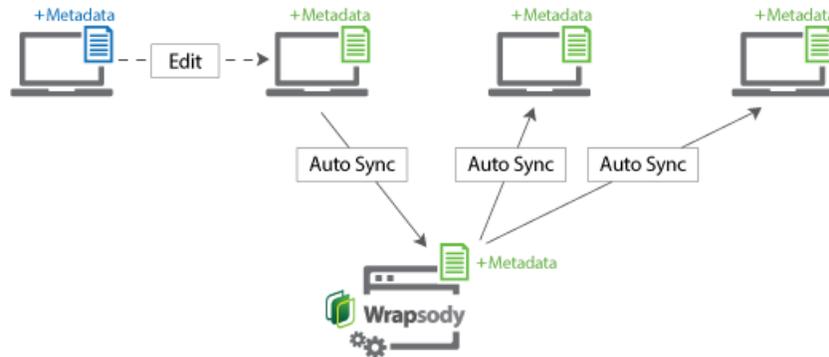


Figure 7: Wrapsody files contain their own content management functionality.

Wrapsody has a client-server architecture. A unique metadata, document ID is granted while users create a Wrapsody document, and various metadata tags, like version ID, variation ID, user access and Tags information associated with the Wrapsody document, and they are referenced when users access the distributed Wrapsody documents. The Wrapsody agent controls applications on local devices while a Wrapsody document is in use, and then synchronizes document content with a Wrapsody server automatically. When users access the distributed Wrapsody documents, the agent checks and updates the document with the latest content available at the server. Depending on policies, designated Wrapsody documents may be uploaded to a pre-defined repository location set by a document owner or administrator. The solution traces user activities of content displaying a full history of file usage, and shows a correlation and dependency map of its derivative documents.

Features and Functions

Users invoke Wrapsody by creating Wrapsody versions of Microsoft Office documents. For example, on a Windows PC, the user right-clicks on the file in Windows Explorer and selects Create Wrapsody Document.

The main features and functions of Wrapsody are:

Metadata-Based File Management

Wrapsody maintains metadata that enables many different ways to organize and view files throughout an organization. It stores most of the metadata associated with files on the Wrapsody server, indexed by Sync IDs that are stored in the files (see below). Wrapsody manages basic metadata about files, including file names; revision dates; the names of users who own, created, or checked out files; and user groups.

For PCs, Wrapsody includes a web-based interface for viewing files based on metadata values. For example, Figure 8 shows all files whose owner contains the string “Jason” and shows details of one particular file.

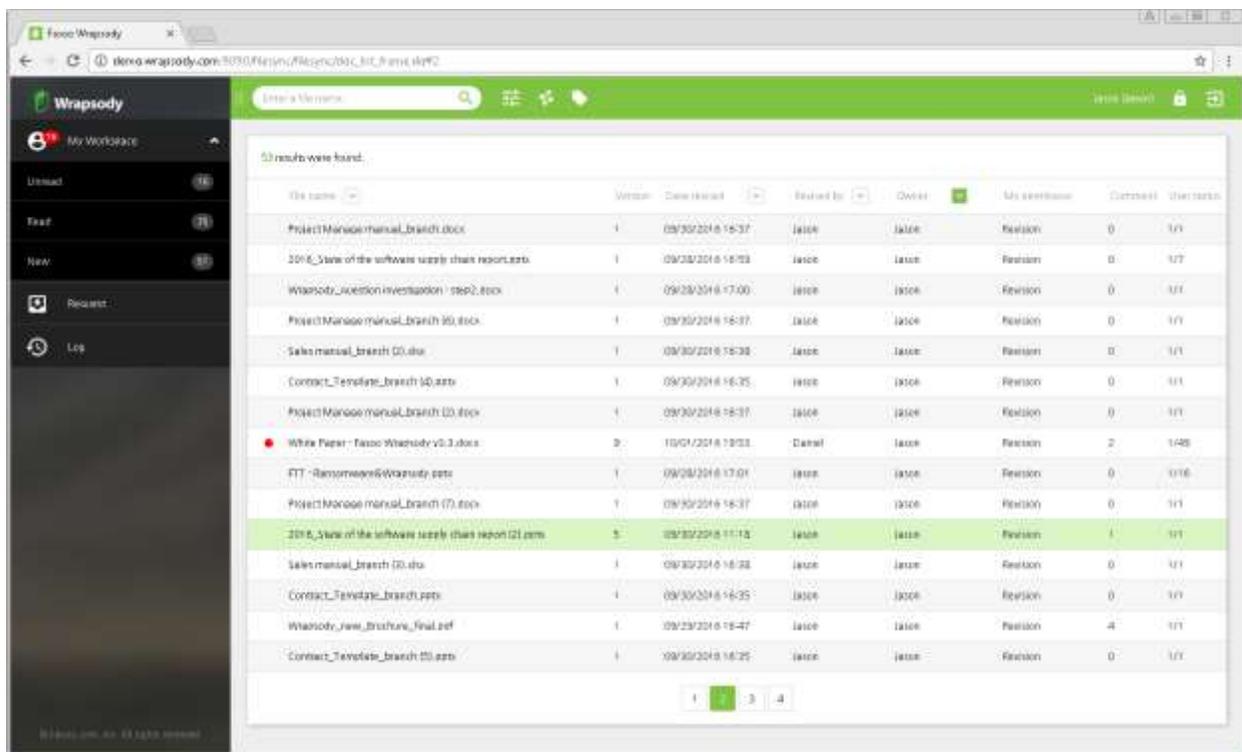


Figure 8: Wrapsody Documents view includes the ability to list all documents owned by a particular user.

In addition to basic metadata, users can assign and change metadata tags, which are useful for organizing files throughout a company. Wrapsody allows three categories of Tags to be defined: Required, Optional, and User (user-assigned Tags). Organizations can set up the Required and Optional Tags to meet their needs, so that users can view documents by various types of classifications.

In the following example, Required Tags are set to Basic, Confidential, Internal Comm[unications], Proprietary, and Top Secret; a user creating a Wrapsody document can select any one of these. Optional Tags are set to roles within the company: Contractor, Finance, HR, IT, Marketing, R&D, and Sales; users can select multiple Tags in this category. Figure 9 shows a step in the creation of a Wrapsody document, in which the user assigns Tags to the document.

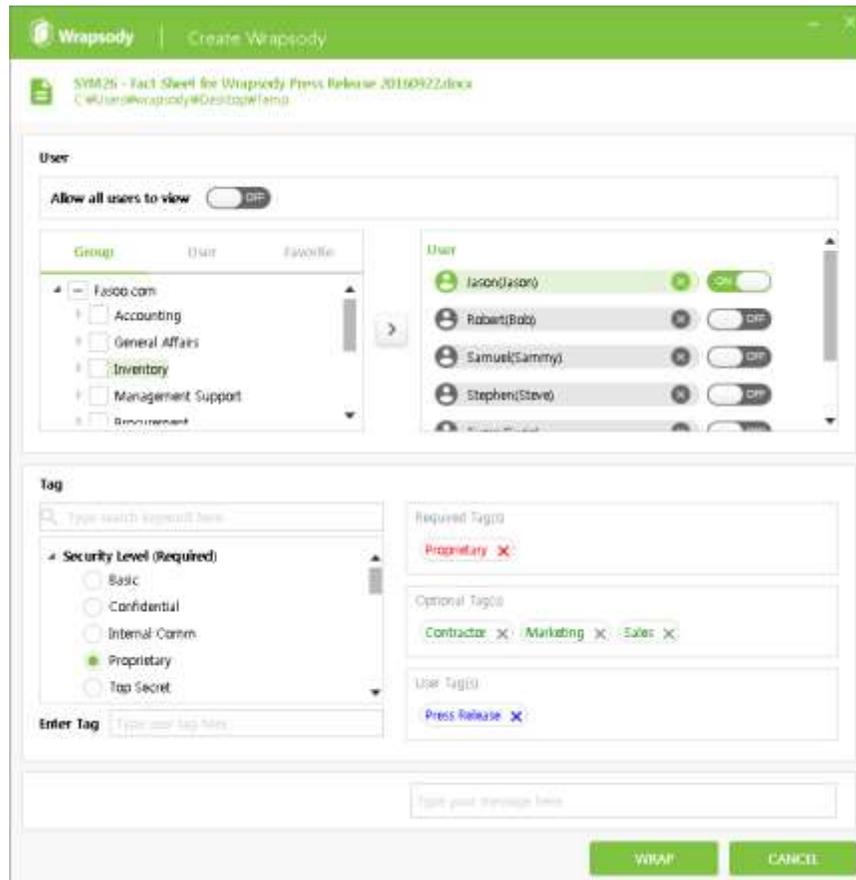


Figure 9: Assigning Tags while creating a Wrapsody document.

The Tag selector within Wrapsody’s Documents view can be used to organize and view files throughout the organization based on Tags. There are three Tag-based views: Tree, List, and Search. Tree view organizes them hierarchically by Tags; List shows all Tags and enables the user to click on a Tag to see all documents with that Tag; Search lets users specify a Tag and then shows all files with that Tag. Figure 10 shows a tree view showing the Required Tags, with the Tag Marketing selected.

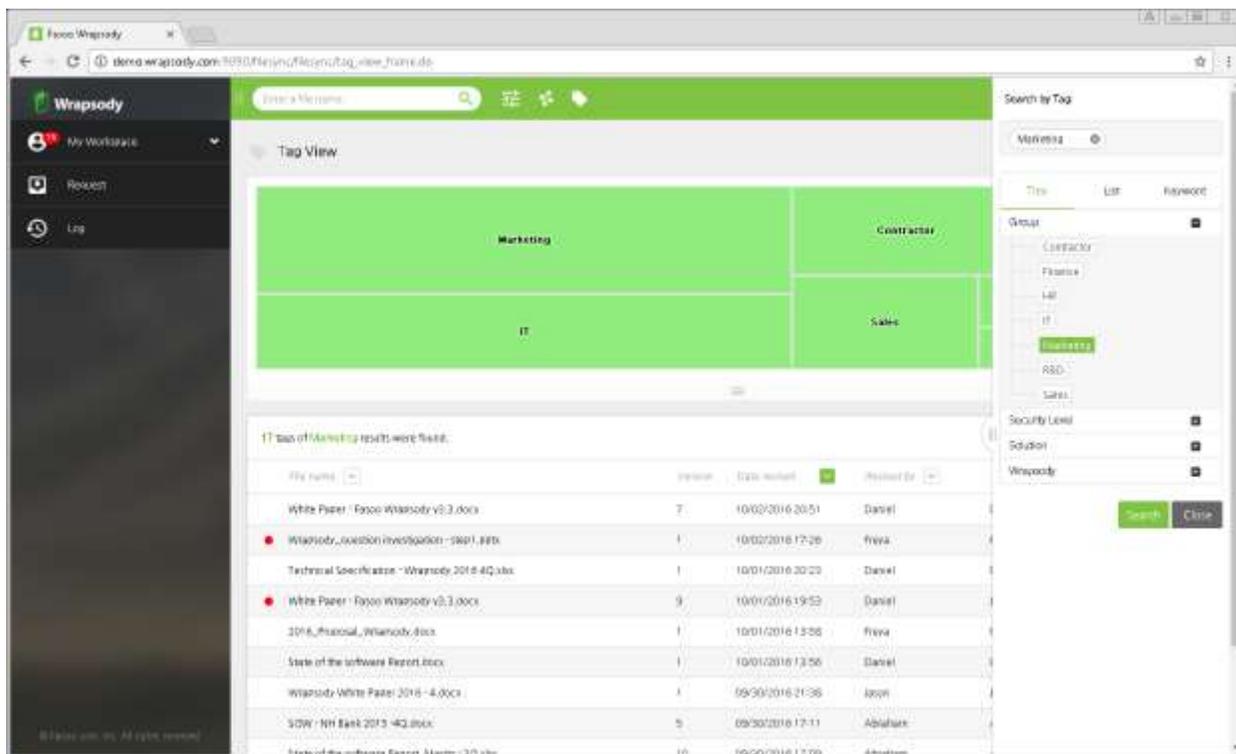


Figure 10: Tree view shows a list of required Tags, with the Tag "Marketing" selected. The results are every document Tagged "Marketing."

Instant Version Control, Backup and Restore

Wrapsody enables version control “on the spot” for individual files instead of within repositories. Users have full control over versioning for each file to which they have rights: they can create new versions, restore old versions, create new version branches, and turn off versioning.

When a user opens a file, the user can decide whether to check it out or just view it. If the user chooses “Check Out,” Wrapsody downloads the latest copy of the file to the user’s PC. Later, when the user selects “Check In,” Wrapsody adds a new version of the file to the server. Wrapsody can be configured so that opening and closing files automatically checks them out and that versioning takes place automatically on an “opt out” basis.

When Wrapsody files are checked in on desktop, the agent automatically backs up each version without user intervention, retaining every copy of digital assets created by users without duplication. Due to automated file-level backup at desktop, users can restore each version instantly, allowing organizations to mitigate risks from potential ransomware attacks.

Users can also create version branches, so that parallel sets of revisions can be made. In this way, a document can be used for different purposes later on, or version control can be turned off for subsequent revisions to a specific version of the file.

On-Demand Sync and Share

When users open up a Wrapsody file, they can be assured that it will always be the latest version. The Wrapsody agent on a user’s device checks to see if there is a newer version available on the server. If so,

it asks the user whether to replace the file with the newer version or open the older one regardless. In addition, when a Wrapsody document is created or updated by a reviser, then other revisers or viewers can receive instant push message or email including the download link of relevant versions.

Chat on Documents

Wrapsody lets users enter comments when creating, revising or reviewing Wrapsody documents. This can be used as a way of maintaining chat sessions about documents, e.g., to discuss reasons for changes or leave approval workflow decisions directly to the documents. Comments can be added to a Wrapsody document and reviewed using Wrapsody agent console or Wrapsody Office add-in module called Application Badge while accessing the document.

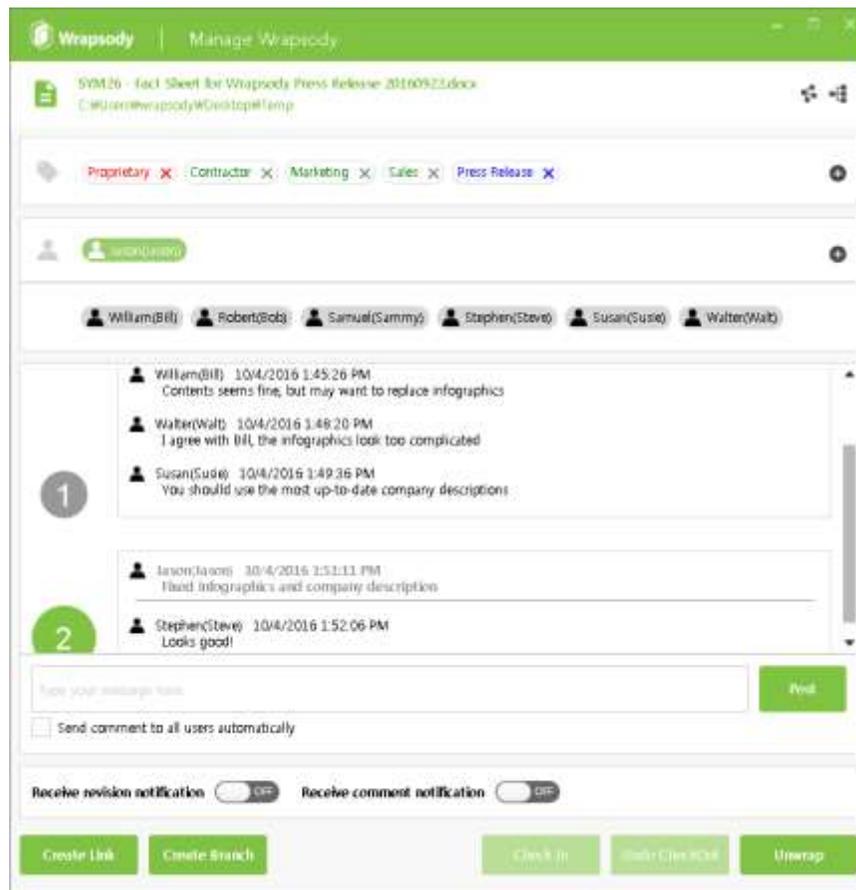


Figure 11: Adding comments on a Wrapsody document.

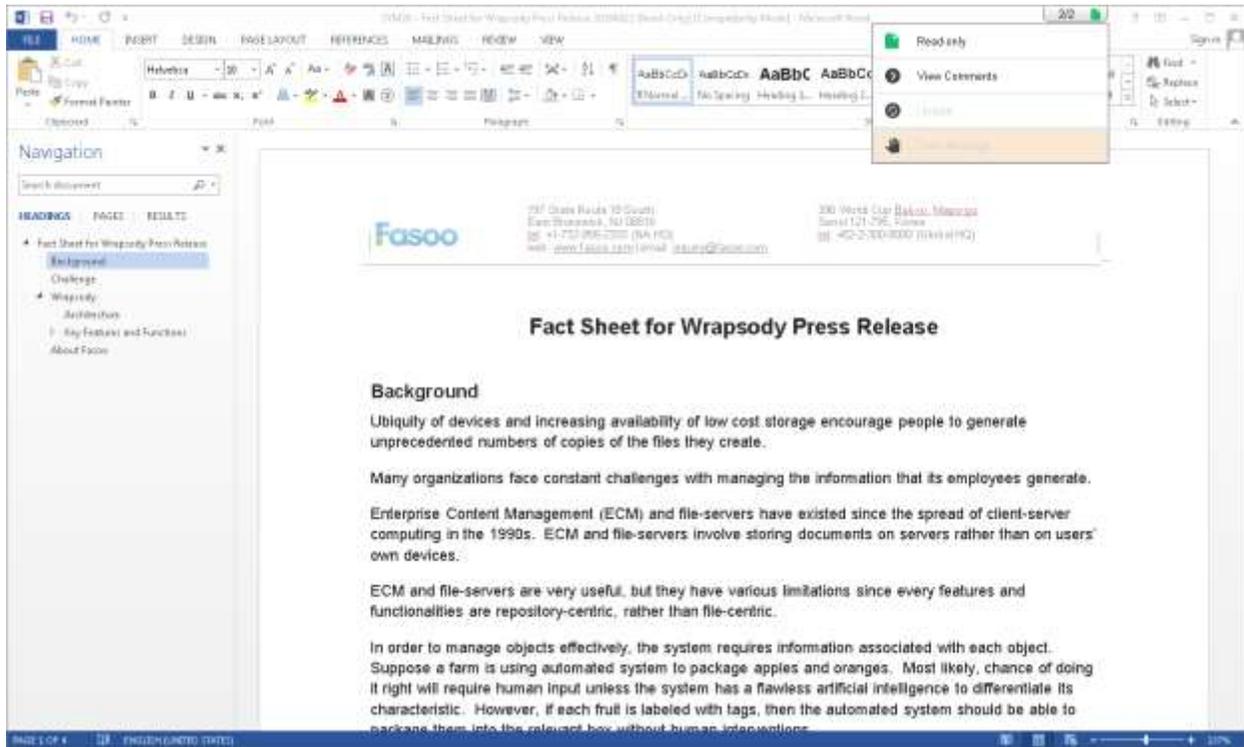


Figure 12-1: Wrapsody Office add-in module, Application Badge

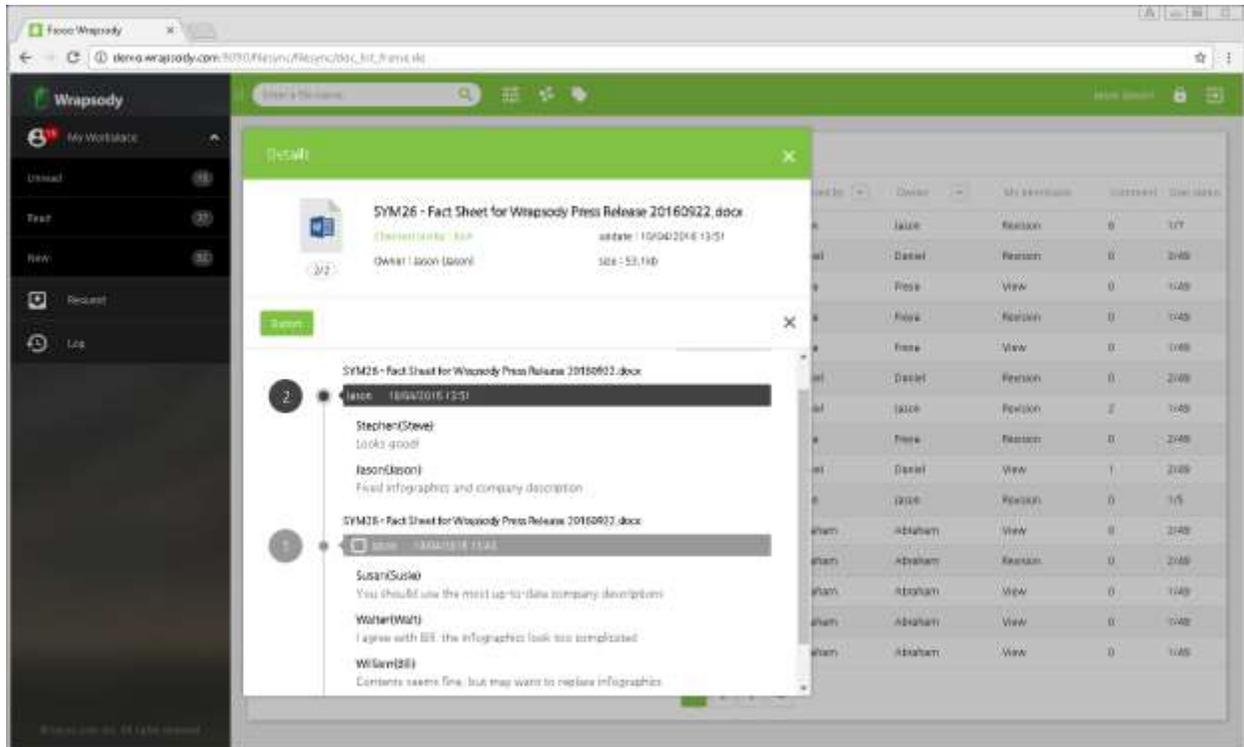


Figure 12-2: Content-centric chat from comments.

Mobile Accessibility

On iOS devices (iPads and iPhones) as well as Android-based smartphones and tablets, Wrapsody's mobile app enables users to get access to the latest versions of documents automatically and without accessing email or cloud storage services. As long as the user has permission on a document, it will be automatically accessible on the user's mobile devices. This includes automated syncing of files on users' PCs with files on their mobile devices.



Figure 13: The Wrapsody virtual workspace for Apple iOS devices.

Analytics on Document Usage

Wrapsody users can easily identify list of documents that are created by or assigned to them using My Workspace. My Workspace shows real-time status of user specific usage of Wrapsody documents. Each user can review number of unread, read or new Wrapsody documents assigned to them. For managers, Wrapsody also provides graphical illustration of user activities for their relevant group, allowing them to review group members' activities and gain managerial insights.

For each document, Wrapsody can display a graphical map that shows the derivation of the current document from other documents, the number of times that each document has been modified, and the original source document. In addition to tracking specific details about versions of a document, this information can be valuable for tracking how document templates are used throughout an organization, which in turn can improve how templates are designed.

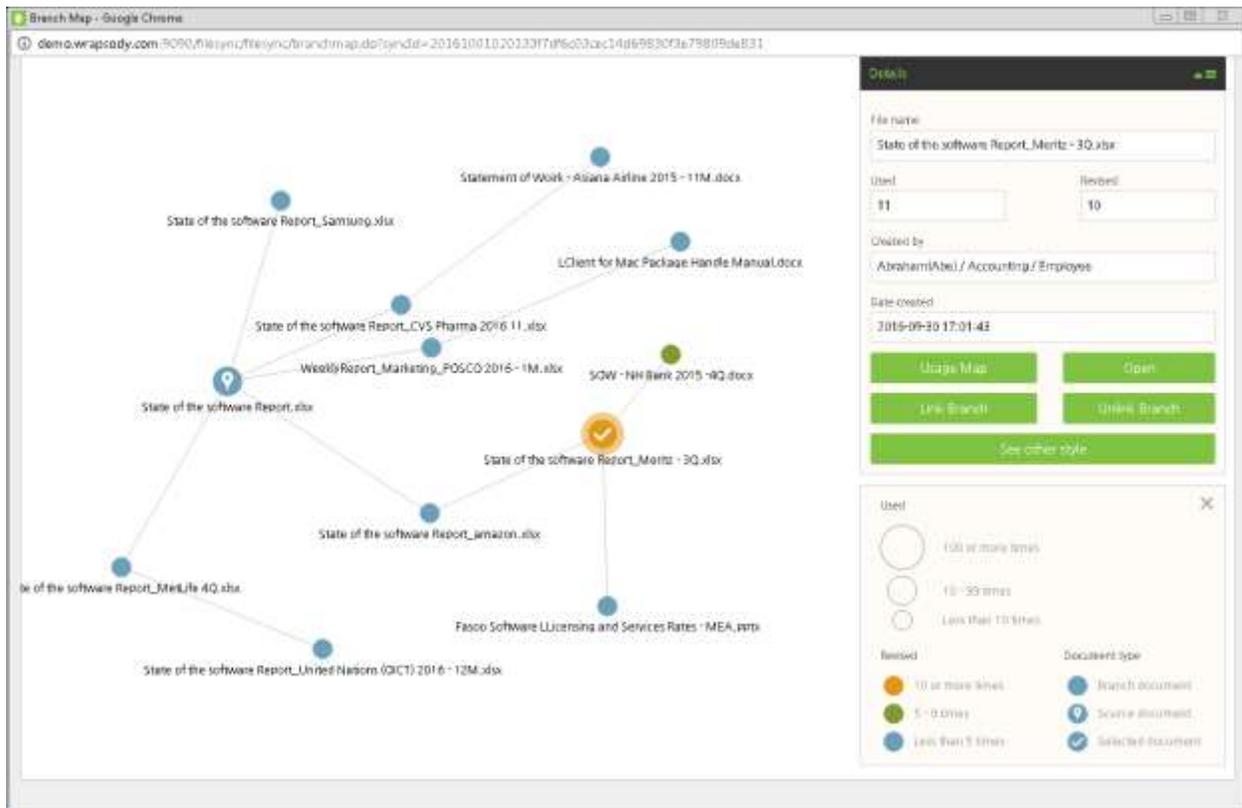


Figure 14: A Branch Map shows the history of document revisions and derivations.

File-based Access Control and Usage Map

Wrapsody offers access control and audit trail from the beginning wherever documents travel and embedded option for Enterprise Digital Rights Management (EDRM) to enhance security. Document owners can define who can revise, view only or have no access to the Wrapsody documents, allowing organization to protect their digital assets against hackers and insiders all together.

Wrapsody can display graphical maps that show how each document has been used according to an organizational chart view. From the Usage Maps view, it is also possible to generate reports on usage per user over time. This can help organizations understand how documents are used across their organizations – to see where standard documents and templates are most likely to be modified, to gauge utility of documents for different divisions, to assist in document classification, and to help set up user access and security policies.

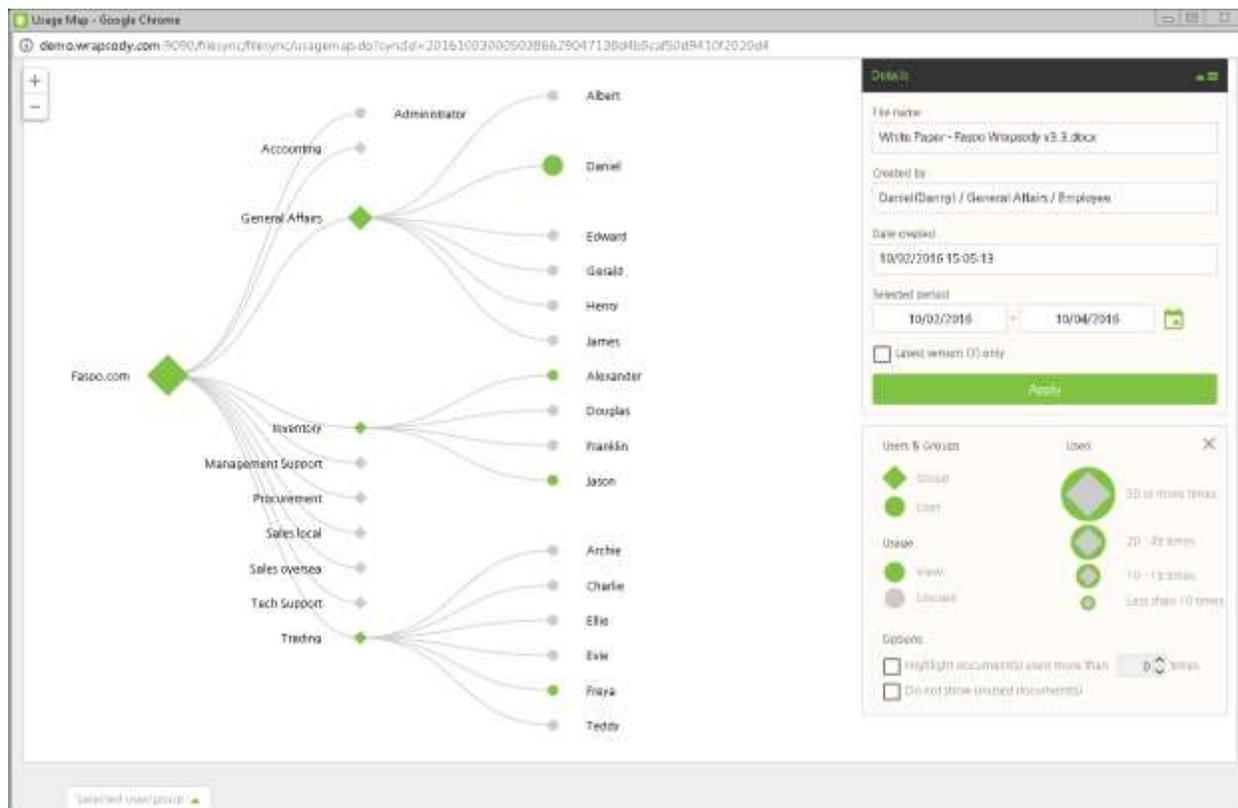


Figure 15: Usage Maps show how documents have been used organizationally over time.

Technologies

Wrapsody is based on Fasoo’s many years of expertise in enterprise security technologies, including Enterprise Digital Rights Management (EDRM). Founded in 2000, Fasoo has more than 1,250 customers comprising an installed base of over 2.5 million users.

The Wrapsody Platform

The Wrapsody platform consists of a server, agent applications on users’ PCs, and virtual workspace apps for mobile devices. Each Wrapsody file is a secure package that contains the contents of the file, which is encrypted using an industry standard strong encryption algorithm (AES256). It also contains metadata, including a creator ID, the account username of the creator, a timestamp for when the file was created, a revision number, and a unique Sync ID of the file; these are all obfuscated using lightweight encryption (RC4).

The Wrapsody agent stores other metadata in a local database on the user’s device and sends it to the Wrapsody server when the file is uploaded. This metadata includes version information, user and rights information, metadata tags, and configuration values.

When a user wants to open a Wrapsody file, the Wrapsody agent takes a “fingerprint” of the user’s device – a number that represents the device’s identity based on characteristics of the device’s hardware and software. It sends this information, along with the Sync ID, to the Wrapsody server to request access.

The server grants access by issuing a small encrypted file called a license, which the Wrapsody agent stores locally.

The server will then check if the file that the user is trying to access is the latest version by querying the server with the Sync ID, version, and timestamp. If it is not the latest version, Wrapsody will ask users if they want the latest version, and if so, will download it from the server.



Figure 16: When a user opens a document and there is a more current version available, Wrapsody asks users if they want the latest version.

ECM Integration

Wrapsody is effective as a standalone system, intended for those organizations that have either been using file servers – whether internal or cloud-based – or are using only networked PCs (and mobile devices). Yet Wrapsody can also be very useful when integrated with ECM systems, to fill in gaps in functionality such as those mentioned in the “Content Management” section above (p. 7). Therefore, Wrapsody is designed to support integration with leading ECM platforms. Currently Fasoo has plans to add out-of-box integration modules for IBM ECM and Microsoft SharePoint for Wrapsody, with more to come via integration APIs. Integration with a Content Management System can offer the best of both worlds: the structure, organization, and integrity of a CMS combined with Wrapsody’s control over files that are checked out of the repository.

With ECM integration, Wrapsody files are synced into the ECM repository. Repositories also receive and manage all of the metadata associated with Wrapsody files, and user permissions set up in Wrapsody are emulated in the ECM system.

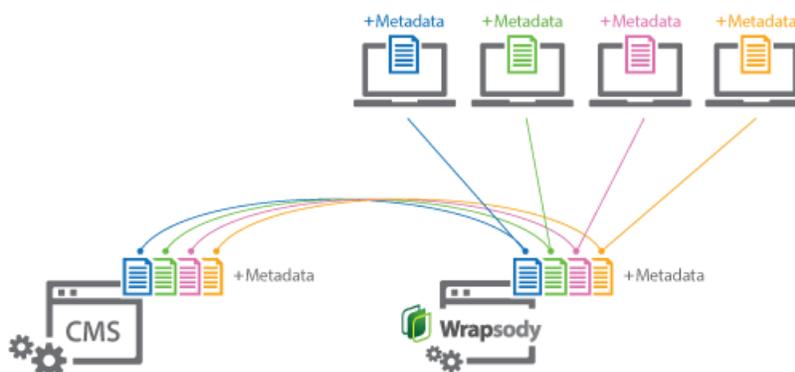


Figure 17: Wrapsody can integrate with a variety of content management systems.

Case Studies

Here are some example scenarios in which Wrapsody can contribute to the accuracy, timeliness, and efficiency of information management.

Company Directory

A Human Resources department frequently sends out a company directory whenever there is an update. The directory is in the form of an Excel spreadsheet, so that everyone has maximum flexibility to sort, search, and analyze all of the information about the company's employees, offices, and contact information without having to export the data into another application.

Wrapsody ensures that everyone is always using the latest version of the company directory and that everyone can use spreadsheet features to use the information for their own purposes. The HR department can make updates to the directory in real time to reflect changes such as new hires, employee departures, job title changes, and new office addresses. By using Wrapsody, employees are empowered with access to the latest company information. .

In contrast, a single read-only spreadsheet stored on a web page or in the cloud ensures that employees always have the latest information but makes it more difficult for them to manipulate it for their own purposes.

Meeting Minutes Template

The Chief Operating Officer of a company has asked the HR department to create a Microsoft Word template for Meeting Minutes, for all workgroups in the company to use. Each workgroup appoints someone to take minutes of meetings and distribute them to the group.

With Wrapsody, the COO can get a quick view of workgroup activity and usage of meeting minutes during a period of time (e.g., weekly or monthly) by looking at Branch Maps and Usage Maps as well as individual sets of meeting minutes. The COO can also find out whether or how workgroups are modifying the Meeting Minutes template for their own use, to help improve the design in future versions. This is all possible without imposing additional work such as entering information into a web form, and it allows for maximum flexibility to adapt the template to meet each workgroup's needs.

Field Sales Presentation

The Eastern Region Sales Manager travels around his territory giving presentations on the company's product line and pricing to prospective and existing customers. He carries a laptop with a PowerPoint presentation showing the product line, knowing that he can show it at a customer site without needing an Internet connection.

The sales manager opens the file before leaving the office or his hotel room for each customer visit. Wrapsody automatically updates it to the latest version. He can also use the Wrapsody console, Branch Maps, and Usage Maps to see who made changes to the document and where that person sits in the organization, to help him easily determine which of the company's products or prices have changed, without relying on external notes or communicating with engineers or product managers. This enables anyone to change the presentation to reflect the latest developments with minimal coordination at headquarters, secure in the knowledge that everyone in the field will be showing customers the company's latest offerings at the most current prices.

RFP Response

A professional services firm has received a major RFP, with a large proposal due in just a few days. The proposal must include work plans from four different teams, as well as budget information from Finance, contract terms from the Legal department, and an Executive Summary from the Engagement Manager.

With Wrapsody, each team can work on the Word document independently without worrying about changes that other teams are making in parallel. Finance and the engagement manager can get constant updates directly from the document itself, so that the engagement manager knows what to put in the proposal's Executive Summary and Finance knows how to calculate fees – all while minimizing extra communication with the teams during a deadline crunch.

The document's Branch Map and Usage Map give Finance and the Engagement Manager indications in close to real time about where the most recent changes were made in pieces of the document and by whom, helping to prioritize final editorial work and resolve any conflicts that come up. Comments entered by members of the project team as they make changes to the document show up as a content-centric chat, which gives the Engagement Manager a convenient overview of who made changes and for what reasons.

Legal Department Contract Tracking

The company's legal department has a standard form of sales contract, a Word document that account managers are required to use when making deals with customers. The company's products are high-priced items that involve configuration and service agreements, so it is common for each account manager to negotiate each agreement individually. Customers' legal departments typically mark up the agreements according to their own policies. As a result, every agreement is unique by the time it is ready for final review and execution. This imposes a heavy workload on the legal department and a resulting slowdown in approval of sales agreements.

Wrapsody can improve this situation in many ways: in terms of the legal department's throughput in getting deals finalized, its understanding of how contractual terms are negotiated during sales processes, and its ability to spot inappropriate shortcuts or risks that the sales organization is taking in order to close deals. The legal department can use Branch Maps and Usage Maps to determine which departments and individuals are making the most changes to the contracts. Then they can drill down to see what changes are being made most often. They can use this feedback to be more selective in getting involved in approval processes. They can also determine any changes in contract terms that customers demand often and that pose acceptable risk levels, so that they can modify the standard form accordingly.

This will increase throughput and efficiency in closing deals so that the company can bring in revenue more quickly and focus more resources on finding new customers without recourse to expensive, complex linguistic analysis tools or rigid workflows.



Conclusion

Wrapsody is a new type of solution for many of the problems with collaboration and information management within organizations today. By ensuring that content management functionality travels with files wherever they go, Wrapsody fills the gaps by complementing technologies such as enterprise content management, cloud storage, enterprise messaging, and enterprise social networks – and in some cases can render them redundant. It's the next step forward for accurate, time-efficient and user-friendly information management.

To learn more, please contact Fasoo at inquiry@fasoo.com.