



OpenText Email Filing, eDOCS Edition

Increased compliance and organization of emails

Most organizations have realized that capturing business content within emails is a very important part of their content management strategy. Email management is a key component of governance compliance and risk management protection. OpenText Email Filing, eDOCS Edition (eDOCS Email Filing) is a rich set of Microsoft® Outlook-based tools that makes it simple and easy for users to now save email into their existing eDOCS document management repository, OpenText Document Management, eDOCS Edition (eDOCS DM). Saving email and documents in the same repository results in increased user productivity, as well as increased data management efficiency. Records management functionality that is in place for documents may now be applied for emails. Users can find all client- or project-based information in a single repository with a single search, saving valuable time and costs and improving response times to clients.

Email Marker

The Email Marker function shows users which emails have been saved in the eDOCS repository from within the Outlook interface. With Email Marker, users can color-code their emails according to filing status and profile data via the Outlook categories field. This visual queue enables users to keep track of the current filing status of all their email to ensure important emails are not overlooked and eliminates duplicate filing of emails already saved into eDOCS DM.

Email Marker also includes an auto-deletion option that allows email to be deleted from Outlook after filing into eDOCS DM, based

on configurable time frames. By applying a retention schedule to email, users can determine how long to keep a copy of filed email in Outlook in case access is still required through mobile devices or tablets, but also when to archive email when it is no longer required. Also, the auto-deletion feature is an excellent tool to help users manage email storage space limitations.

Auto Bulk Filing

The Bulk Filing feature allows for large quantities of email to be filed quickly and easily with a single completed profile. Users can highlight multiple emails and then, via a right mouse click menu choice, they can

BENEFITS

- Maximize the value of the business content stored in emails
- Increase your organization's return on investment (ROI) and compliance status
- Encourage team collaboration with improved transparency and visibility
- Transparently capture, manage and govern email to lower the cost of compliance
- Increase efficiency by enabling the management of emails from mobile devices
- Enable recovery of key matter emails within single repository to improve client response times

complete a profile to file all the selected email in a single instance. The architecture of the eDOCS Email Filing allows immediate filing results regardless of the quantity of emails to be filed.

With Auto Bulk Filing, users can automate the filing process by assigning profiling data to specific Outlook folders. All emails that are moved into the Outlook folders will be automatically filed into eDOCS with the assigned profile data of the folder. Email can also be filed on mobile devices by dragging and dropping them into monitored folders. The Auto Bulk Filing feature was designed to allow email to be filed simply and easily by working within users' existing Outlook business practices of folders usage.

Thread and Subject Filing

Email that is associated with an existing thread that has already been saved can be filed automatically. The Thread Filing function automatically files any future email that is part of a continuing conversation thread, saving valuable time and effort.

Subject Filing extends the Thread Filing feature by automatically filing emails based on matter id, project id or similarities in

the email subject. With the Outlook ribbon button, users can easily insert the id with just a few clicks.

Email Filing Assistant

Email Filing Assistant analyzes message history and inbound email addresses and then automatically suggests the best place to store them inside eDOCS DM. It extends the functionality of eDOCS DM by adding intelligence to the saving dialogue so that metadata such as project, matter, or document type—that previously had to be manually entered—can now be automatically filled in.

Quick Filing

The Quick Filing function offers predictive filing suggestions and is accessed via a button on the Outlook ribbon or with a right mouse click. Suggestions are displayed based on the most recently accessed profiles and email threads.

Exchange Connector

The optional Exchange Connector allows the Auto, Thread and Subject Filing processes to retrieve email directly from the Microsoft Exchange server instead of the Outlook

client-based machine. Users can file email in real time on remote devices or web-based interfaces without having to run their client machine.

Document and Records Management

eDOCS DM increases productivity by enabling faster access to content, providing control over metadata classifications, and enabling users to better organize documents; whether it be through the use of folder structures, tailored workspaces, or metadata. OpenText also offers a complete integrated Records Management solution to address legal and regulatory issues around records, mitigate business risk, and avoid the costs associated with improper records handling. It also averts the negative consequences that lost or invalid knowledge assets have on the viability of organizations and their decision-making abilities. When combined with OpenText Email Filing, all of these records and risk management capabilities are extended to your email stores. ■