

■ Solution Brochure

# Open Text Email Filing, eDOCS Edition

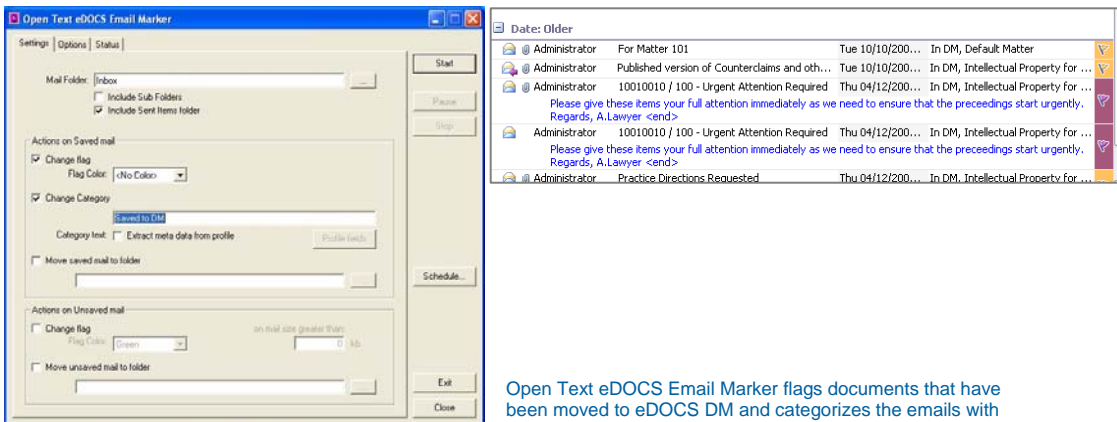
## Increased compliance and organization of emails

### The Business Challenge

Most organizations have realized by now that taking care of business content captured in emails is a very important part of the company's content management strategy and that a document management library is a useful repository for email storage. Open Text Email Filing, eDOCS Edition (eDOCS Email Filing) is a rich set of user friendly and time saving add-on modules developed for organizations that want to maximize the value of the business content captured in emails. All modules integrate seamlessly with Open Text Document Management, eDOCS Edition (eDOCS DM) making sure users can easily and effectively store emails in the document library while increasing your organization's return on investment (ROI) and compliance status.

### Track Email

By making it easy to track which emails have already been saved, Open Text eDOCS Email Marker ensures that nothing important gets overlooked. It automatically checks the content in the Microsoft Outlook folders and compares it with the content in the DM library. Email Marker then flags saved or non-saved emails with selected colors, moves certain types of emails to selected Outlook folders, and/or automatically changes Outlook categories to selected values, such as Client/Matter, to indicate where the email has been saved.



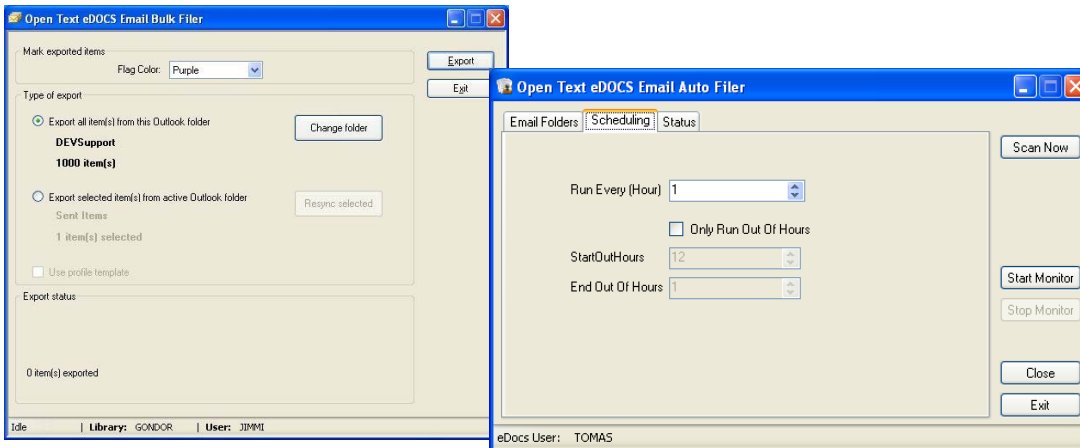
Open Text eDOCS Email Marker flags documents that have been moved to eDOCS DM and categorizes the emails with metadata from the documents' DM profiles

### Automatic Email Filing

Open Text eDOCS Email Auto Filer monitors MS Outlook folders and stores emails in eDOCS DM with metadata that has been associated with the Outlook folder. All emails are stored with header fields and thread information as if they were filed with standard DM functionality. The backend process monitors the Outlook folders and copies any new emails to a folder on the server where the email filing service takes over, making sure all messages are stored into DM with metadata and email header fields. This makes saving emails from Outlook into DM very efficient and eliminates user wait time.

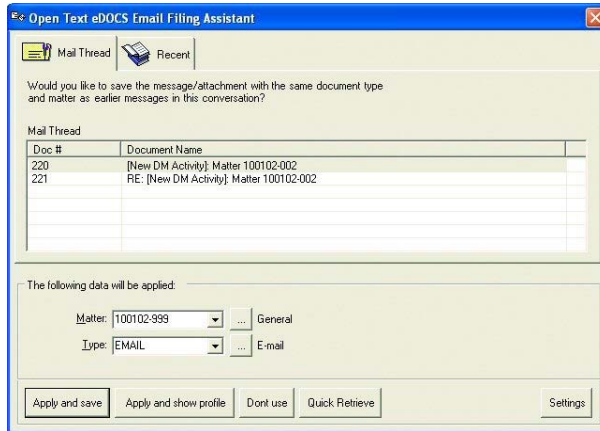
### Bulk Email Filing

Open Text eDOCS Email Bulk Filer stores multiple emails with the same metadata into eDOCS DM in a single operation. Because the emails are stored in the library's server, this is a much faster alternative to using standard DM email save functionality, especially when saving a large number of emails into eDOCS DM. The backend process uses a Windows Service that installs on one of the servers. This server accesses the DM server through the DM Application Programming Interface (API). Selected messages are copied into a monitored folder in the server where the email filing service takes over, making sure all messages are correctly stored into DM.



### Email Filing Assistant

By automatically using metadata from previously saved emails, Open Text eDOCS Email Filing Assistant allows your organization to reduce both time and effort spent on message and attachment profiling, while simultaneously facilitating consistent profiling into the DM library. Email Filing Assistant 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 generated. The solution is simple yet flexible: selecting what metadata to inherit could not be easier.



### 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. Open Text offers a complete 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.



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