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DATA SHEET

OpenText Email Filing, eDOCS Edition

Simplify organizing emails by client, matter or project using Microsoft Outlook folders

Leverage business information stored in email through effective management and collaboration

Minimize IT burden with intuitive, integrated email content management

Protect email and attachments from insider threats

Improve compliance by maintaining email records and defensible information governance

List of associated OpenText products the component works with:

- OpenText™ eDOCS
- OpenText™ eDOCS Defense
- OpenText™ Records Management for eDOCS
- OpenText™ Image Crawler for eDOCS

Email communication in the Legal industry is increasing in volume, often with upwards of thousands or, even the previously unthinkable, millions of emails per client, project or legal matter. Knowledge workers, including lawyers, are spending more time each day on administrative tasks required for effective and compliant email filing. Just looking for relevant information, such as email content, along with attachments containing sensitive or confidential information, can result in lost hours every day.

Maximize productivity by finding email and related content quickly

Manually organizing related emails that often govern business content can be overwhelming and drain productivity for skilled subject-matter experts, including attorneys, case experts and legal support professionals. This often makes it difficult to quickly find information needed for an urgent communication. However, bulk and individual email filing and storage are possible through the power of smart automation for email filing and administrative processes, giving legal staff time for more valuable, strategic activities.

OpenText™ Email Filing, eDOCS Edition, an add-on within the OpenText™ eDOCS platform, helps legal professionals and their IT teams gain control of email overload and solve resulting content chaos problems. User-friendly tools, such as single-click filing, builds a list of metadata for previously filed emails, and automated administrative tasks reduce time spent searching for information. Legal professionals can file email by client and matter within existing eDOCS libraries and see a holistic view of an entire matter in one accessible location.
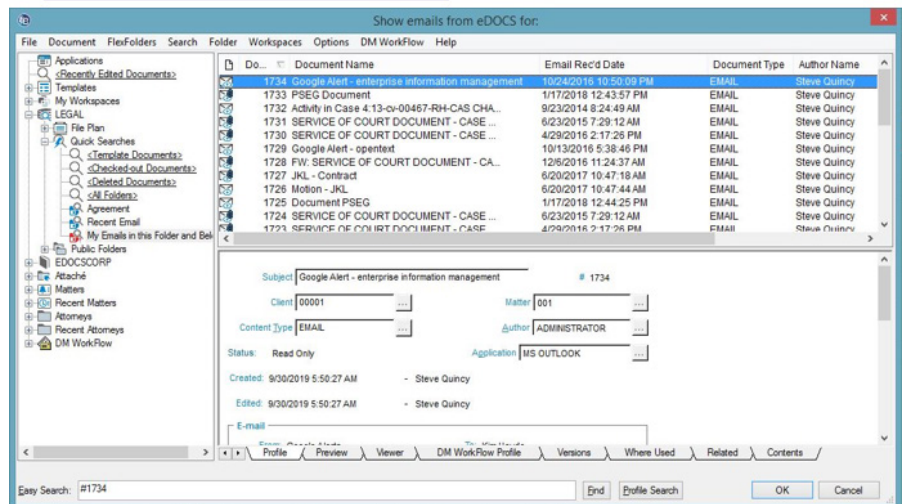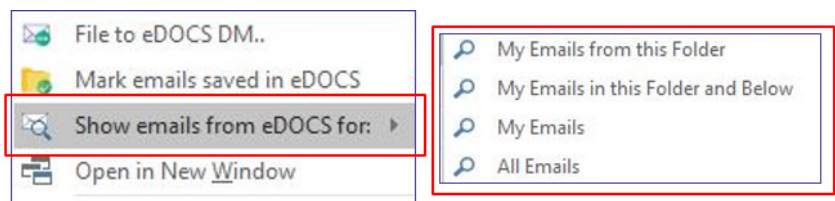
Save time by tailoring the email view to the Microsoft Outlook structure

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With the full content of emails and other matter-related documents at hand in one central location, legal professionals and their teams can make more informed, faster decisions. Users can now respond in realtime with advice that is informed by the entire matter history, improving matter representation and strengthening client relationships.

OpenText Email Filing, eDOCS Edition features	
Automate administrative tasks	Integrate email alongside all relevant client matter in eDOCS and free valuable time for more strategic efforts and ensure greater effectiveness.
Leverage quick filing	Predictive filing suggestions based on the content and characteristics of an email enables rapid single-click filing via right mouse click or the button on the Outlook ribbon.
Example table header	Analyze message history and inbound email addresses to automatically suggest the best place to store email in the eDOCS library.
Bulk filing	Sort large quantities of email quickly and easily in just one step, without stopping or bogging down Outlook. By assigning profiling data to specific Outlook folders, all email moved into the folders is automatically filed in eDOCS with the assigned profile data of the folder. Emails can also be filed on mobile devices by dragging and dropping them into monitored folders.
Thread and subject filing	Ensure that any email associated with an existing thread that has already been filed is automatically filed to the same location.
At-a-glance marking	A visual cue differentiates email that has already been stored within the eDOCS library directly from the Outlook interface.
Operate in realtime on remote devices or web-based interfaces	Enable quick thread and subject filing processes to operate in realtime without input from the client machine. Exchange Connector retrieves email directly from the Microsoft[*] Exchange server instead of the Outlook client-based machine.
Work in a familiar Microsoft environment on any device	Knowledge workers can focus on skilled work, while Email Filing, eDOCS Edition acts as a virtual administrative assistant that automatically captures, organizes and classifies email alongside related content in the eDOCS library with minimal input.
A centralized document management system	Store email in the eDOCS centralized document management system while simultaneously retaining the Outlook folder structure without duplicating filing efforts. Emphasize client service without worrying that content will be lost, misplaced or hard to find when needed.
Lower compliance risk	By automatically integrating email alongside all relevant client matter in the legal content management system, users comply with privacy and corporate governance requirements.

With Email Filing, eDOCS Edition, law firms and corporate legal departments can leverage the value in email, maximize productivity and ensure a more efficient approach to email governance and security.

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Customer success story »

Manage email content chaos: How to quickly file and find information stored in email
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By adding eDOCS Defense, a document security module, organizations can encrypt sensitive documents and email at the document library level, ensuring that only users authorized to access specific documents can view that content, protecting valuable information on-premises, stored on backup media and in the cloud.

Additionally, Records Management for eDOCS provides a completely secure, feature-rich records management solution from within the eDOCS library. With the combination of Records Management for eDOCS, eDOCS Defense and Email Filing, eDOCS Edition, lawyers have the tools to protect content assets against risk, such as litigation, security breaches and disaster recovery, while meeting increasingly complex regulatory requirements.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: **opentext.com**.

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