



Organize email and find messages instantly.

Integrate document management with the tool that handles the majority of your important business communications—Microsoft® Office Outlook®. With the optional Email Rules User Module, individuals can organize email messages and attachments within a managed repository where information can be immediately retrieved, shared with others, and saved in a secure environment.

- § Use custom rules to automatically profiling and capture messages.
- § View a list of related email threads and navigate to them instantly.
- § Find any email message in seconds with full-text search and instant results.
- § Manage related messages, for example project-related communications, in a manner where information can be easily shared with other project team members.

Users can organize email and fax records.

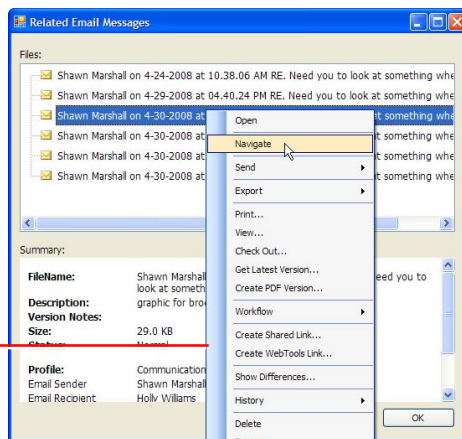
Email Rules provide individuals a “user-level” email management tool for sorting, distributing, profiling, and filing email and electronic faxes as they come in to users’ Outlook Inboxes.

- § Create rules that automatically attach profiling information to email messages based on content, or set up email rules to prompt users for profiling information when email is imported.
- § Create rules that automatically notify users based on email content or subject.
- § Create a rule that tracks all communications on a contract, a project, or other important business activity.
- § Capture faxes from a Fax folder in Outlook. All faxes are full-text indexed as they are saved so you can search on words or phrases in the faxes to find them later.

Find email messages in seconds and view related emails.

As messages are saved to Document Locator using Email Rules, they are indexed for full-text searchability, making them easier to find. Email thread information is also captured when emails are imported, so you can view a list of related emails for any messages that have them.

The Related Email Messages dialog includes right-click menu access to common commands, including navigating to related email.



Benefits

- Organized, searchable email – Find any email message in seconds. Sorts, organizes, and instantly retrieves email based on content and metadata.
- Captured thread information – Email Rules captures thread information so you can view lists of related email.
- Automated email processing – Automatically notify users, request approvals, and initiate workflows based on email content.
- Improved Exchange Server performance – Provides alternative for users to store user email on the Exchange server or in user .pst files.

Solutions

- Project management – Capture and archive incoming communication from vendors, contractors, and clients.
- Customer support – Keep track of customer requests for orders and assistance that come in via email.

Automated profiling with email rules further enhances the ability to find documents because it eliminates inconsistent profiling that often results when email is archived manually. With email rules, there's no need to remember where to file emails or what profiling information to attach.

Manage project communications for easy access and collaboration.

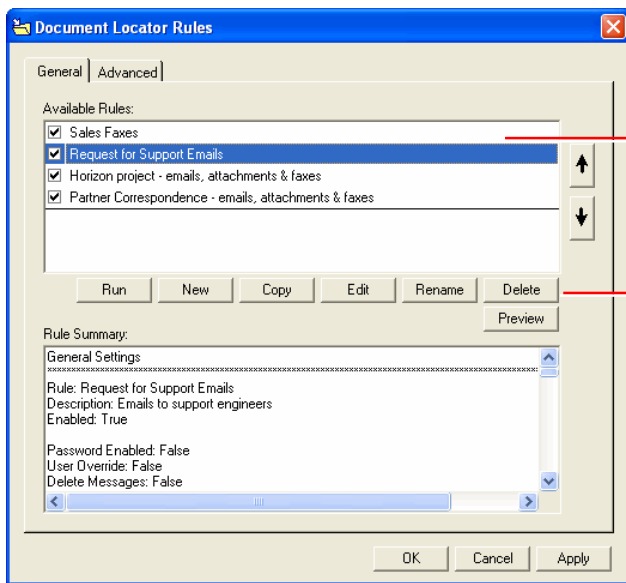
- § Use automated rules to capture related project emails in the document management system where the communications can be shared with other project team members.
- § Organize project communications along with other project documents and search and retrieve information from a single source.

Full integration with Microsoft Outlook makes it easy to manage emails, attachments, and faxes.

Email Rules operates as a natural extension of Microsoft Outlook. The Document Locator menu is added to the Outlook File menu, and you gain new right-click functionality within Outlook.

The Email Rules wizard makes creating email rules easy, and gives you complete flexibility to manage and organize your email, attachments, and faxes.

- § Use the Preview function to test your rules to make sure they capture email as expected.
- § Save, distribute, and password-protect email rules so that email coming in to users' Outlook Inboxes is managed according to company policies.
- § Use the Advanced tab on the Rules wizard to adjust document processing schedules and to perform other administrative tasks.



Example of rules in the system.

Create, copy, edit, rename, preview, and delete rules.

Related Features

- Email Archive Server Module – Manage email at the enterprise level for compliance, risk reduction, and efficiency.*
- Automated Workflow – Incorporate a request for a workflow into an email rule.*
- Document Approval – Request approval for email messages, attachments, and faxes as they are imported.
- Document Profiles – Create special Profiles designed to fit your project email.
- Microsoft Integration – Keep users working in a familiar environment.
- Records Management – Create record policies to apply to email that qualifies as business records.
- Scanning – Capture, profile, and import faxes and other documents.*
- Searching – Create saved searches that let you instantly locate emails and other documents.
- Security and Auditing – Restrict access to sensitive email content.
- Version Control – Keep track of different versions of form emails.

For more information about products or purchasing, please visit:

www.documentlocator.com

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