



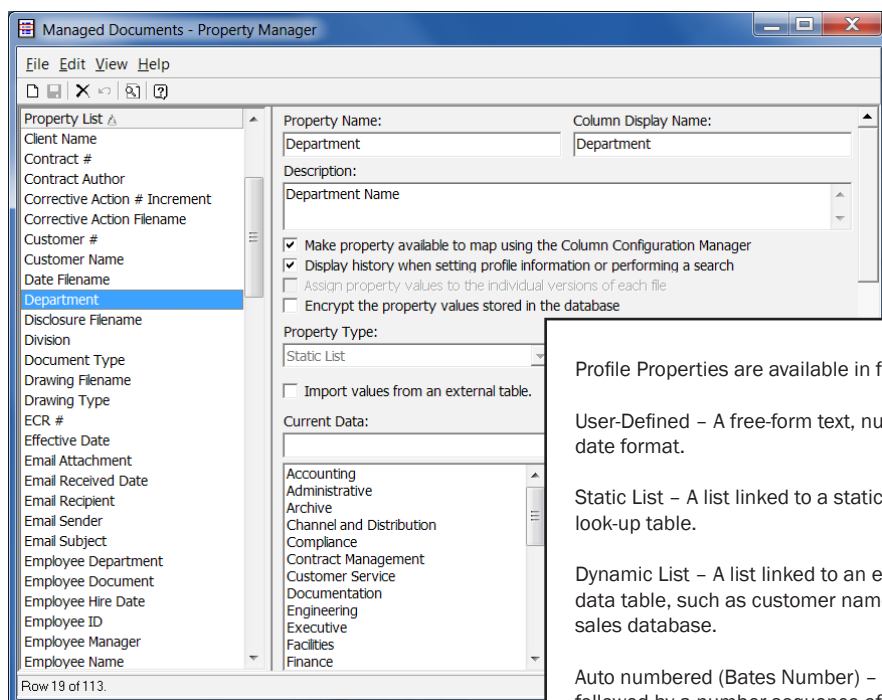
## Customizable profiles and properties add valuable metadata

Profiles attach descriptive information to your documents, making them easier to categorize, store, retrieve, and use in business processes.

- Organize files with metadata that uniquely identifies your documents and enables you to organize them in multiple ways.
- Maintain compliance with government and industry regulations by profiling email and other electronic documents.
- Improve searching by using profiling information to find documents.
- Apply Profiles automatically during import or manually as needed.

## Customize Profiles to match your organization's needs.

Profiles are made up of Profile Properties—flexible metadata fields you create to fit how your organization uses documents. You define Profile Properties and then group them into Profiles. Profile Properties can be used in more than one Profile at a time, so you can reuse them over and over again.



Profile Properties are available in five types:

User-Defined – A free-form text, numeric, or date format.

Static List – A list linked to a static Property look-up table.

Dynamic List – A list linked to an external data table, such as customer names in a sales database.

Auto numbered (Bates Number) – A prefix followed by a number sequence of a specified length.

Auto Generated – Data pulled automatically from a file itself to use as metadata.

## Benefits

- **Metadata**  
Structure information with metadata values that define the facts about files.
- **Full-customization**  
Fully customized profiling matches your business needs.
- **Automated profiling**  
Apply metadata automatically to documents as they are imported to the repository.

## Solutions

- **Email compliance**  
Comply with e-Discovery and other regulations governing electronic documents. Use auto-generated properties to automatically organize email with profiling information pulled from email headers as email is imported.
- **Organization**  
Apply Profiles on import to quickly cross-reference documents regardless of their internal folder structure.
- **Application integration**  
Use database functionality in Profile Properties to link to other applications such as CRM and ERP.
- **Regulatory compliance**  
Catalog your electronic information for fast search and retrieval.

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**With document Profiles, you can organize and structure your documents according to how they are used, not just by department, file name, or location. For example:**

- Identify Engineering documents with Profile Properties such as project name, build number, CAD drawing number, customer name, etc.
- Create dynamic Profile Properties that pull values from an SQL Server database, such as a list of client names.
- Auto-name documents by applying an auto-numbering Profile Property to files as they are imported.
- Create version-level Profile Properties to identify and locate specific document versions.
- Adjust document Profiles and Profile Property definitions as your organization grows and changes.

### **Maintain regulatory compliance.**

Profiling helps your organization maintain compliance with government and industry regulations by properly cataloging your electronic information and making it easy to find and retrieve. For example:

- Use Profiles to tag and track important information to stay in compliance with federal regulations such as Sarbanes-Oxley, HIPPA, e-Discovery, FDA, and more.
- Protect sensitive information using the Profile Property encryption option to encrypt property values stored in the database (requires SQL Server 2005).
- Create Profile Properties to identify specific types of business records.

### **Find documents based on Profiles and Profile Properties.**

Document Locator's search engine is integrated with the Profiles and Profile Properties you assign to documents, making it quick and easy to find all documents related to a specific topic or Profile. For example:

- Find all documents that have a specific Profile.
- Find all documents that have a Profile containing a specific Profile Property with a specific value.
- Find all documents with any Profile Property containing a specific value.

### **Automate profiling or apply and update manually.**

Profiles can be automatically applied during import or applied manually.

- Apply Profiles to an entire directory or a folder at once. Documents imported to the directory or folder automatically inherit the Profile assigned to the folder.
- Apply Profiles as you save documents from within any Microsoft Office application.
- Update a document's Profile from the right-click menu. You can also update the Profile for a group of documents or a folder of documents the same way.

### **Related Features**

- **Document Workflow**  
Automate business processes
- **Email Management**  
Automatically profile and import email, attachments and faxes.\*
- **Folder Properties**  
Associate Profiles with folders and restrict their use to enforce organizational standards.
- **Importing Documents**  
Apply Profiles and Properties to documents as they are imported.
- **Microsoft Integration**  
Keep users working in a familiar environment to make profiling documents easier.
- **Notification Subscriptions**  
Receive a notification whenever a designated file's or folder's metadata changes.
- **Records Management**  
Ensure compliance with government and industry regulations.
- **Scanning**  
Batch scan documents automatically and then profile them as they are imported to the repository.\*
- **Searching**  
Search on document Profiles and Profile Properties.
- **Security and Auditing**  
Protect Profiles and Properties from unauthorized alteration.
- **Version Control**  
Assign special Profile Properties to document versions.

\* Optional

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