

EMC My Documentum for Microsoft Outlook

Seamless integration of enterprise content management capabilities with the familiar user experience of Microsoft Outlook

The Big Picture

- Enables users to fully leverage Outlook's native user interface features, menus, and toolbars to file, store, find, and manage critical e-mails and documents in the repository
- Allows knowledge workers to utilize Documentum content management functionality directly from the Outlook interface
- Provides users the ability to work with content anytime, even when disconnected from the repository
- Enables organizations to improve compliance with corporate governance efforts by allowing users to archive e-mail and associated attachments into scalable, secure repository folders governed by corporate retention policies

Your knowledge workers use Microsoft Outlook as a productivity tool, a messaging platform, and a vehicle for transacting business. They spend their days in Outlook—managing calendars and tasks and exchanging business-critical information through e-mail. They do not want to learn a new application—they want to continue to work within the familiar Outlook interface.

On average, 80 percent of an organization's users require only 20 percent of the basic content services capabilities provided by enterprise content management platforms such as EMC® Documentum®. The content management requirements of these users while working within Outlook often include:

- Storing e-mails, including attachments, in the appropriate repository folder to enable e-discovery and litigation requests.
- Searching the repository to locate content—they need to find relevant information quickly and easily.
- Managing content even while disconnected from repository—they need access to the latest versions of content and the ability to work while offline.
- Importing content into the repository to comply with regulatory requirements or corporate policies.
- Sharing repository-based content via e-mail messages.

Knowledge workers simply want the ability to access basic content services through the familiar Outlook interface without having to navigate to a new application.

Content management functionality with familiarity

With EMC My Documentum for Microsoft Outlook, enterprises can now deliver content management functionality directly from within Outlook.

My Documentum for Microsoft Outlook blends the convenience and familiarity of Microsoft Outlook with the power of EMC Documentum enterprise content management. The newly named My Documentum for Microsoft Outlook is the new release of the existing EMC Documentum Client for Outlook (DCO). The My Documentum for Microsoft Outlook client embraces the rich user experience of Outlook that most knowledge workers already know and love, and extends the ubiquitous desktop footprint of Outlook with enterprise content management capabilities.

My Documentum for Microsoft Outlook allows users to save and store e-mails to the repository, automatically extracting and importing metadata such as sender's name, recipient's name, date, and subject. Users have access to the basic Documentum content management features from familiar Outlook menus and toolbars, and can manage content even when offline or disconnected from the repository. Working from within the familiar Outlook environment increases efficiency and enables widespread adoption and use.

Improvements to a strong foundation

The newest release of My Documentum for Microsoft Outlook builds on the product's foundation of leveraging a native Outlook user experience and providing support for offline access. Key improvements fall into the following three categories:

- **Ease of use:** Extends the natural Outlook user experience to enterprise content management. My Documentum for Microsoft Outlook is completely integrated with Outlook menus, toolbars, and search and folder structures.
- **Archiving and compliance:** My Documentum for Microsoft Outlook introduces usability improvements such as support for Outlook rules to automatically import content—leveraging the Outlook rules engine—and a one-step send-and-save operation that can ease the burden of regulatory or corporate policy compliance. E-mails and/or attachments can be retained as “records” by storing them in a folder governed by EMC Documentum Retention Policy Services.
- **Knowledge management:** The new release of My Documentum for Microsoft Outlook provides comprehensive metadata management functionality, such as folder attribute inheritance and the ability to set metadata by type during multi-select import operations. Most importantly, the new release now offers offline access to the repository and automatic synchronization of changes once reconnected to the repository.

Accessible, easy-to-use content management at every desktop

My Documentum for Microsoft Outlook delivers improved access to shared and corporate content while reducing common enterprise content management training and adoption barriers and improving knowledge worker productivity.

My Documentum for Microsoft Outlook offers:

- **Extensive content management capabilities:** E-mails and content can be searched, previewed, checked out/in, edited, and versioned. Users do not need to leave their everyday e-mail client to leverage the benefits of best-in-class content management features for increased efficiency and widespread adoption and use.
- **Multiple methods to capture content:** My Documentum for Microsoft Outlook enables multiple methods to capture and store content in context. As a natural part of their daily activities, users can utilize familiar, intuitive methods such as drag-and-drop (e-mails, attachments, files, and folders), Outlook rules, copy/paste, and a one-step send-and-save operation to easily store critical content.
- **Native Outlook user experience:** Integration with Outlook's preview/reading pane, menus, toolbars, customizable list views, folder tree view, favorites, search folders, rules, and forms provides a familiar and powerful user experience that enables widespread adoption and use.
- **Offline access and support:** Allows users to specify content to be accessible even when disconnected from the content server. My Documentum for Microsoft Outlook uses the same familiar user paradigms and interfaces available in online mode, enabling users to analyze, edit, and manage existing e-mails and documents, and capture new content. Upon reconnection to the content server, My Documentum for Microsoft Outlook intelligently synchronizes all content, and provides users with a means to manage any conflicts quickly and accurately.
- **Single unified folder structure:** Documentum folders, cabinets, and rooms can be exposed via the Outlook folder tree as fully functional Outlook folders. Users can navigate the Documentum repository via these folders for easy access to secure, well-organized, version-controlled content.
- **Comprehensive metadata management:** Each e-mail, attachment, or document can be classified with metadata fields tailored or customized to organizations' specific requirements. When multiple objects are imported, metadata can be managed one object at a time, or grouped by object type. My Documentum for Microsoft Outlook can be configured to inherit attributes from the target folder, or prompt for metadata via an Outlook-style import dialog.

- **Comprehensive search capabilities:** Users can leverage Outlook-style search functionality such as searching for content by word or phrase, advanced search options to specify additional search criteria such as an object's properties.
- **Content sharing:** Users can insert content from the repository into outgoing mail as they would any Outlook attachment by simply browsing and searching and then inserting it. Content can be attached to an e-mail as either a typical attachment or as a link to referenced content in the repository. Content can also be exported to the file system from the repository via familiar drag-and-drop, Copy/Paste, File/SaveAs commands.

Summary

With My Documentum for Microsoft Outlook, EMC continues its investment in Microsoft-powered platforms. Knowledge workers can continue to work through the familiar Outlook interface to leverage the benefits of Documentum enterprise content management—enabling increased efficiency and widespread adoption and use of Documentum and enterprise content management.

About EMC

EMC Corporation (NYSE: EMC) is the world's leading developer and provider of information infrastructure technology and solutions that enable organizations of all sizes to transform the way they compete and create value from their information. Information about EMC's products and services can be found at www.EMC.com.



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