

Microsoft OBA and EMC My Documentum for Microsoft Outlook

Leverage robust content management capabilities and collaborate securely from within the familiar Microsoft Outlook interface

The Big Picture

- Office Business Applications help simplify ad-hoc knowledge worker interaction by bridging the gap within the informal processes that knowledge workers actually follow.
- My Documentum for Microsoft Outlook 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.

Billions of dollars have been invested in purchasing, tailoring, deploying, and maintaining enterprise content management systems and other integrated business solutions, yet few companies realize the full promised benefits. Most companies struggle to adequately connect people and their practices with the business data and processes that embody line-of-business systems. This translates directly into widespread failure to realize the expected returns on investments made in enterprise hardware and software.

This failure occurs mainly because line-of-business systems rarely take into account the true complexities of how work is completed. Knowledge workers use systems to obtain data, but the real work is done through a more fluid interaction between co-workers and other people. More than just retrieving information from one system and updating it in another, processes often involve collaboration, sharing, and discussion between people. These unstructured, ad hoc processes are not typically captured within traditional transactional system interactions.

Office Business Applications

To address these issues, Microsoft offers Office Business Applications (OBAs). OBAs are an emerging breed of applications that leverage the power of the Microsoft Office Business Platform, including the clients, servers, services, and tools that comprise the 2007 Microsoft Office system. Employees typically perform significant additional work outside of the formal processes of line-of-business systems as they collaborate with other people via phone and e-mail, obtain information from multiple sources in the form of documents and spreadsheets, and switch between online and offline modes for meetings and business trips. OBAs help simplify this interaction by bridging the gap within the informal processes that information workers actually follow.

Office Business Applications provide the following benefits to the enterprise:

- **Extensibility:** Microsoft Office client applications can be extended to create purchase orders, estimates, or invoices to address company-specific needs. Through customization, users can integrate data and business logic that is unique to each business.
- **Familiarity:** OBAs enable knowledge workers to get started immediately. By starting with the Microsoft Office tools that they already know, the learning curve is considerably lessened.
- **Connectivity:** A unified communications platform allows users to chat over a secure network with full logging and encryption capabilities, all under the control of enterprise servers. Presence makes it easy to see who is online and available. Document collaboration and application sharing can spur productivity in new ways. And voice or video chat can reduce conference costs.

Platform capabilities

Office Business Applications are made possible by key platform capabilities, called OBA Services, in the 2007 Microsoft Office system. These consist of: workflow, search, the Business Data Catalog, Microsoft Office Open XML Formats, and the website and security framework. These services can be used to extend Microsoft Office system investments in business intelligence, unified communications and collaboration, and enterprise content management.

Microsoft Outlook and EMC Documentum

Microsoft has a strategic partnership with EMC that enables organizations to extend their Microsoft Office system investments—particularly Microsoft Outlook—in enterprise content management. Most knowledge workers manage their day using the familiar interface of Outlook. They use Outlook as a personal productivity tool, messaging platform, and a business transaction channel.

But relying on e-mail as the primary method to preserve corporate information exposes organizations to many risks. First, this business critical information is lost in e-mail threads and not easily discoverable. If e-mails are preserved at all, they are often stored in unmanaged local or shared data stores. Most importantly, this content does not leverage enterprise content management capabilities such as retention and records services, full-text search, version control, membership management capabilities, and others.

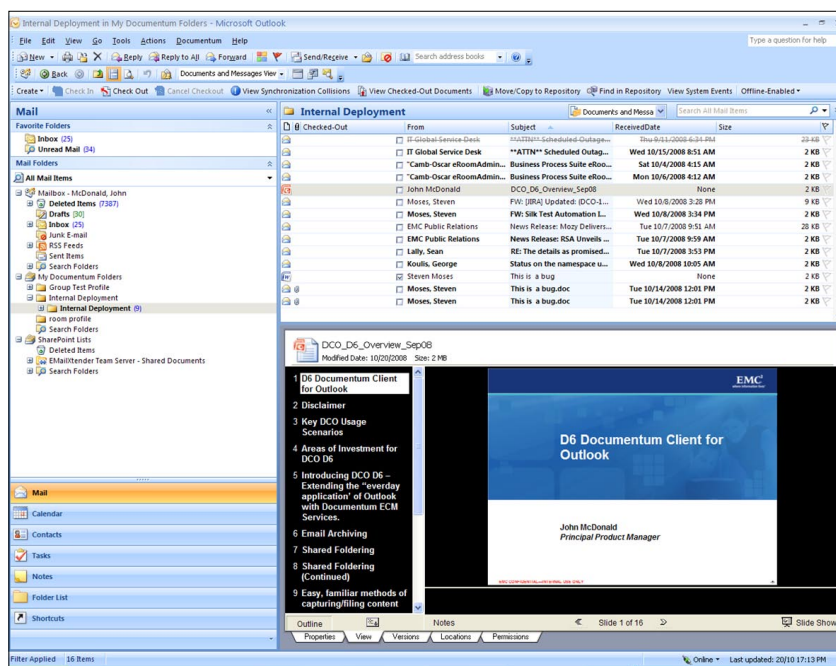
Enterprise content management with Microsoft Outlook

The strategic partnership between EMC and Microsoft enables knowledge workers to work within the familiar, easy-to-use interface of Microsoft Outlook, increasing adoption of enterprise content management capabilities. EMC® My Documentum® for Microsoft Outlook enables seamless integration of enterprise content management capabilities with the familiar user experience of Microsoft Outlook. Enterprises can now deliver content management functionality directly to the popular business applications that knowledge workers use everyday.

My Documentum for Microsoft Outlook blends the convenience and familiarity of Microsoft Outlook with the power of Documentum enterprise content management. With My Documentum for Microsoft Outlook, Outlook users can realize immediate productivity gains with simple features such as content sharing and versioning while gaining access to an extensive range of content management capabilities. My Documentum for Microsoft Outlook also 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.

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

My Documentum for Microsoft Outlook 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. Users can file e-mails, including attachments, into the appropriate repository folder by simply dragging and dropping. Once e-mails are stored in the repository, knowledge workers can utilize Documentum content management functionality such as properties, permissions, versions, and locations directly from the Outlook interface.



The newest release of EMC My Documentum for Microsoft Outlook leverages the Microsoft Outlook 2007 interface

Usability improvements enable users to insert content into outgoing mail as either an attachment or link and to save e-mails and attachments to the repository when sending via a new “Send and Save” command. Offline support has been added to allow users to work with content anytime, even when disconnected from the repository. In addition, My Documentum for Microsoft Outlook supports Microsoft Outlook 2007 SP1 and Microsoft Outlook 2003.

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.
- **Offline access and support:** User content is 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.
- **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.
- **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, and saved search folders to store search criteria for later use.
- **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

OBA provides Microsoft users with the tools to connect people and processes to facilitate the effective exchange of information, increasing productivity. Documents remain at the center of the experience, while deep integration with business logic, data, and services make them more relevant than ever. Users can collaborate and get work done in familiar ways. The Microsoft and EMC Documentum partnership enables users to collaborate securely and work within the familiar Microsoft Outlook interface while leveraging robust content management capabilities. With OBAs and My Documentum for Microsoft Outlook, knowledge workers can work the way they want to, while meeting IT needs for security, governance, and compliance, and helping companies increase the adoption of OBAs and enterprise content management systems.



EMC Corporation
Hopkinton
Massachusetts
01748-9103
1-508-435-1000
In North America 1-866-464-7381
www.EMC.com

Take the next step

To learn more about EMC My Documentum for Microsoft Outlook, visit www.EMC.com or call 800.607.9546 (outside the U.S.: +1.925.600.5802).