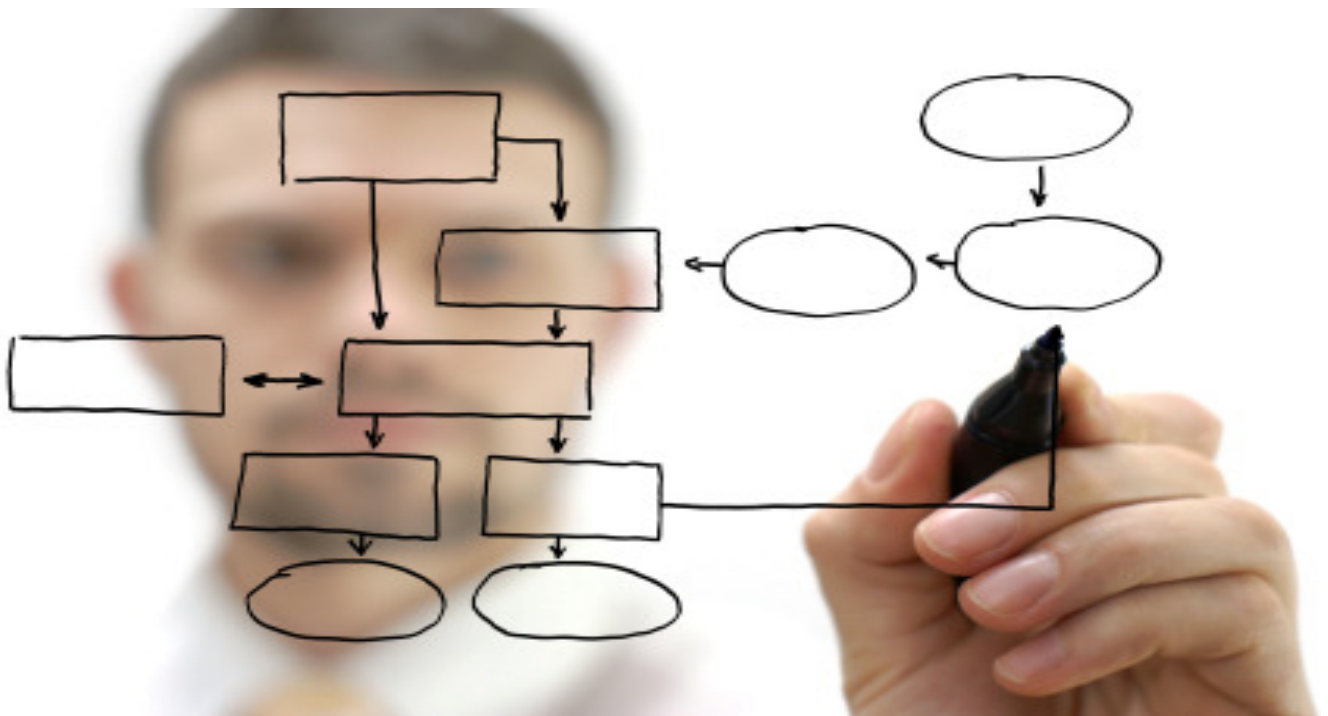


Office Automator Email and Communications Tracking System



Communications Management

is a key issue for most companies. In particular, the huge volume of emails sent and received daily make archiving and later searching for specific content - often required for legal reasons - almost impossible. Most email programs also allow users to retrospectively modify email contents, ruling out the use of emails as evidence. A lack of a centralised company-wide contacts database also hampers business efficiency.

Information systems are key to managing communications, however disparate and conflicting systems often reduce rather than improve business efficiency.

Office Automator ECTS overcomes these issues and delivers a powerful, flexible solution for storing and tracking email, phone calls, faxes and physical communications such as letters and tender documents. A central contacts database makes managing customer and employee information simple.

Office Automator ECTS integrates tightly with Microsoft Office for correspondence, emails, tasks and calendaring, minimizing user training. All communications (including attachments) are recorded, tracked, cross referenced and (in the case of emails) threaded, making them easily searchable and auditable.

Benefits

Track Everything – Lose Nothing

Every email, email attachment, letter, fax and phone discussion is numbered, stored and tracked. Powerful cross referencing, correlation, email threading and search capabilities make finding information simple.

Auditability

Office Automator timestamps all communications and prevents any alteration or removal of records.

Legal Enforcement

Office Automator satisfies record retention requirements for admissible evidence.

Style Management

Every email, fax and letter created automatically complies with corporate presentation standards on a company, project and package level.

Reduce Costs & Improve Productivity

Standardized automated processes improve efficiency and reduce costs. Users have the communications tools they need at their fingertips.

Office Automator Communications Management Tools

OA Outlook Email Manager



Email Manager integrates within Outlook to provide communications management and tracking in an environment familiar to most users.

Email Manager enables users to: Create emails automated with your business style, registration, coding and revision processes; Register and manage emails and automatically track email threads; Use the centralised contact database

OA Communications Tracker



Communications Tracker provides a centralized view of the database of all informal communications including emails, phone call journals and diary entries with powerful filter and search capabilities, including the ability to view email conversation threads.

Communications Tracker is integrated with Outlook Tasks and Calendar functions.

OA Contacts Manager



Contacts Manager is an extended centralised global contact repository for employees and external contacts. Contacts Manager integrates with Outlook Tasks, Outlook Calendar and telephone systems. It also provides Call Journaling – while the user is on the phone they can make, file and email notes about the conversation to the recipient, to create a closed-loop decision making process.

OA Document Generator



Document Generator uses Automated Transaction Templates¹ to create the Letters, Faxes, Email Documents, Memo's and Call Reports used within your business. The documents are automated with your business style, registration, coding and revision processes and will automatically be given a transaction number. Correspondence can be cross referenced to documents or to other correspondence as required.

OA Mail Manager



Mail Manager provides multiple ways to collect all incoming and outgoing *physical* mail to form a part of your knowledge base by Recording and tracking incoming and outgoing mail, its storage location, location of any electronic copies, cross references and associations.

OA Transaction Manager



Transaction Manager is the control centre for the built in Enterprise Content Management System. In Communications Manager, it is used for managing formal correspondence, such as Letters, Faxes and Email Documents, as well as to store and track copies of all attachments sent out in emails. Transaction Manager also provides the capability for automated Document Transmittals

Integration

Office Automator integrates easily into different business environments. There are three key areas of integration: Contacts, Content (such as documents sent as email attachments) and Email.

Contacts

Office Automator can exchange data with other systems such as Active Directory and CRM products for contact management. This allows users to have a central view of all contact information within the business and avoids the problems of users keeping vital contact information in their personal contacts lists.

Content

Office Automator uses SQL and Hidden Shares for content storage and management. Its flexible data mapping system makes it possible to share a common data store with products such as Trim, Sharepoint or Livelink

Email

Office Automator integrates tightly with Microsoft Outlook, however it manages email independently of existing mail infrastructure such as Exchange or hosted mail systems. This means that you don't need to change your current email systems to employ Office Automator, simply install and Office Automator will take care of the rest.

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¹ For an explanation of Automated Transaction Templates and how Business Process Automation works, see Document OA-13831