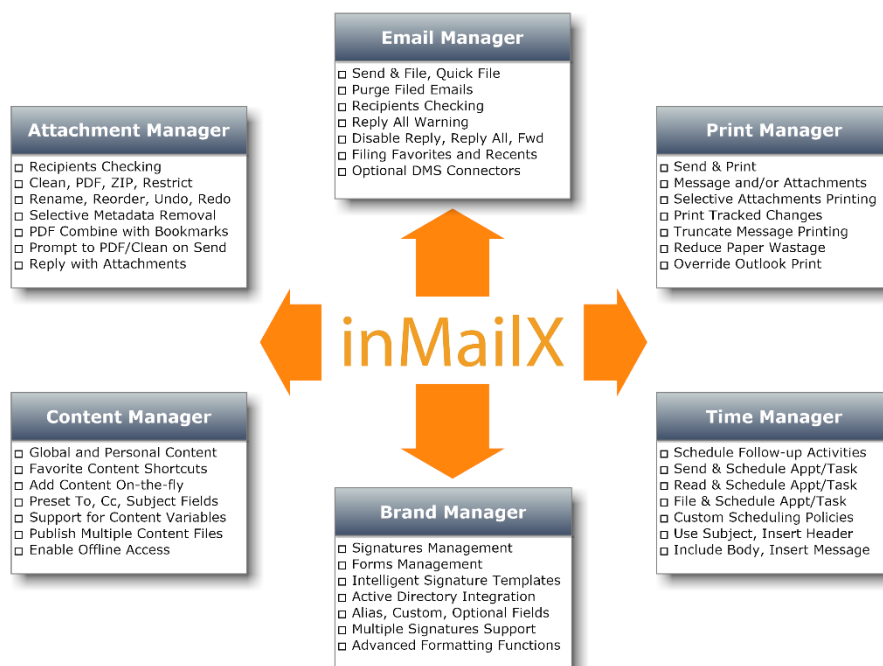# inMailX®

Enterprise Email Management, Compliance and Productivity

Introduction

inMailX is an integrated email management, compliance and productivity solution for Microsoft Outlook, which brings together features and functionality that enable users to effectively manage their emails and attachments, improve their email filing compliance, and enhance their productivity.

When used with its optional connectors, inMailX streamlines and enhances the user experience when filing emails and attachments into third party electronic documents and records management systems, such as Cloud and Network Stores, iManage Work/Worksite, Micro Focus/HPE Content Manager, NetDocuments, SharePoint, Worldox.

inMailX modular architecture enables organizations to easily deploy and gradually activate the modules that add immediate benefits to their users and business processes.

Attachment Manager
- □ Recipients Checking
- □ Clean, PDF, ZIP, Restrict
- □ Rename, Reorder, Undo, Redo
- □ Selective Metadata Removal
- □ PDF Combine with Bookmarks
- □ Prompt to PDF/Clean on Send
- □ Reply with Attachments

Email Manager
- □ Send & File, Quick File
- □ Purge Filed Emails
- □ Recipients Checking
- □ Reply All Warning
- □ Disable Reply, Reply All, Fwd
- □ Filing Favorites and Recents
- □ Optional DMS Connectors

Print Manager
- □ Send & Print
- □ Message and/or Attachments
- □ Selective Attachments Printing
- □ Print Tracked Changes
- □ Truncate Message Printing
- □ Reduce Paper Wastage
- □ Override Outlook Print

Content Manager
- □ Global and Personal Content
- □ Favorite Content Shortcuts
- □ Add Content On-the-fly
- □ Preset To, Cc, Subject Fields
- □ Support for Content Variables
- □ Publish Multiple Content Files
- □ Enable Offline Access

inMailX

Brand Manager
- □ Signatures Management
- □ Forms Management
- □ Intelligent Signature Templates
- □ Active Directory Integration
- □ Alias, Custom, Optional Fields
- □ Multiple Signatures Support
- □ Advanced Formatting Functions

Time Manager
- □ Schedule Follow-up Activities
- □ Send & Schedule Appt/Task
- □ Read & Schedule Appt/Task
- □ File & Schedule Appt/Task
- □ Custom Scheduling Policies
- □ Use Subject, Insert Header
- □ Include Body, Insert Message

inMailX scales easily to meet the needs of virtually any organization.

As new users are created, they automatically receive enhanced emails management functionality, efficient attachments Clean, PDF, Protect, ZIP, Rename and Reorder tools, Global content, personalised email signatures, so that they can immediately become productive with inMailX.

Modular Features and Functionality

inMailX empowers users to become more productive and responsible when processing emails and attachments. In addition, inMailX assists organizations to enforce corporate policies, improve compliance and mitigate risk, and reduce administration overheads by incorporating all its modules into a single add-in.

Email Manager Module

- Ability to 'Send & File', 'Quick File' and 'Auto File'* Emails
- Forced Filing on Send, 'Purge Filed' Emails
- Recipients and Attachments Checking
- Customisable Favorite and Recent Folders
- Quick File to Favorite and Recent Folders
- Universal Folder Search and Navigation
- Enhanced Email Notifier with Filing
- Reply All Warning and Disable Reply/Reply All/Forward
- Integration with Cloud Stores, Network Folders, and Document Management Systems via optional Connectors
  - FileSystem, SharePoint, NetDocuments, WebDAV
  - iManage Work/Worksite, MF/HPE Content Manager, Worldox
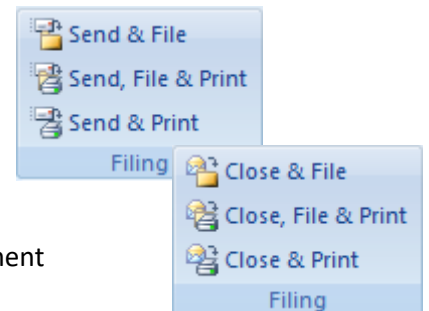
Attachment Manager Module

- Remove metadata from Word, Excel, PowerPoint, PDF and Image attachments
- Password protect Word, Excel, PowerPoint and PDF attachments
- Active and passive conversion of email attachments into PDF
- Combine and bookmark multiple attachments into a single PDF
- Secure and protect PDF content with read password
- Protect PDF content by disabling copy, modify, print
- Restrict and alert users when sending DMS links
- Replace** DMS links with document copies on send
- Combine and compress attachments into ZIP
- Rename individual attachments while composing emails
- Reorder email attachments in any desired sequence
- Undo/Redo to quickly revert actions performed on attachments

Content Manager Module

- Personal and Global content help standardise and streamline email communication
- Favourite content shortcuts enable quick access to commonly used content
- Easily add and update personal content on the fly
- Prepopulate To, Cc and Subject fields, and personalize content with ASK variables
- Create multiple global content files, and control how they are deployed to user groups using NTFS permissions
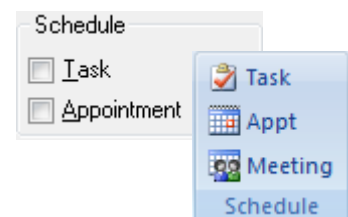
Print Manager Module

- Ability to 'Send & Print'***, 'Close & Print'
- Selective email message and attachments printing
- Truncate printing to specified number of threads
- Print tracked changes in Word attachments
- Print all worksheets in Excel attachments
- Cover page showing print summary
- Save paper by printing only the most recent email conversation threads
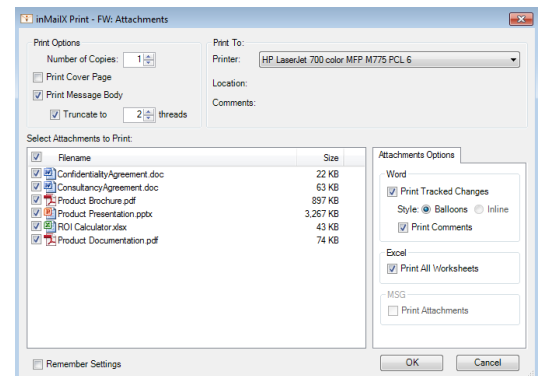
Time Manager Module

- Schedule follow-up activities from emails
- Send & Schedule Task or Appointment
- Read & Schedule Task or Appointment
- File & Schedule Task or Appointment
- Configurable Scheduling Policies
  - Use Subject, Insert Header
  - Include Body, Insert Message

Brand Manager Module

- Integrates Outlook signatures and forms with Exchange Global Address List (GAL)
- Integrated Phone Message custom form included
- Signature template scripts can be used to:
  - Display GAL fields only when they contain data
  - Hide specific GAL fields per user
  - Alias fields replacement
  - Maintain signature scripts per user
  - Create multiple signatures per user
- Supports multiple Outlook email signatures
- Generate multiple signatures using signature aliases
- Control signature templates deployment using NTFS/AD permissions
- Standardise and deploy corporate email forms
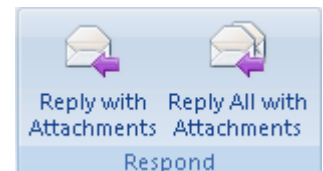
inMailX modules can be purchased separately or bundled in two cost effective suites:

- **inMailX Standard Suite** includes: *Attachment Manager, Content Manager, and Print Manager Modules*
- **inMailX Professional Suite** includes: *Email Manager, Attachment Manager, Content Manager, Print Manager, Time Manager,* and *Brand Manager Modules*

Auto File works with iManage Work/Worksite, Micro Focus/HPE Content Manager, NetDocuments, and Worldox
*Replace feature works with NRL, TR5, and WDL links, and requires optional AM DMS connector**
**Send & Print feature requires inMailX Email Manager Module.*
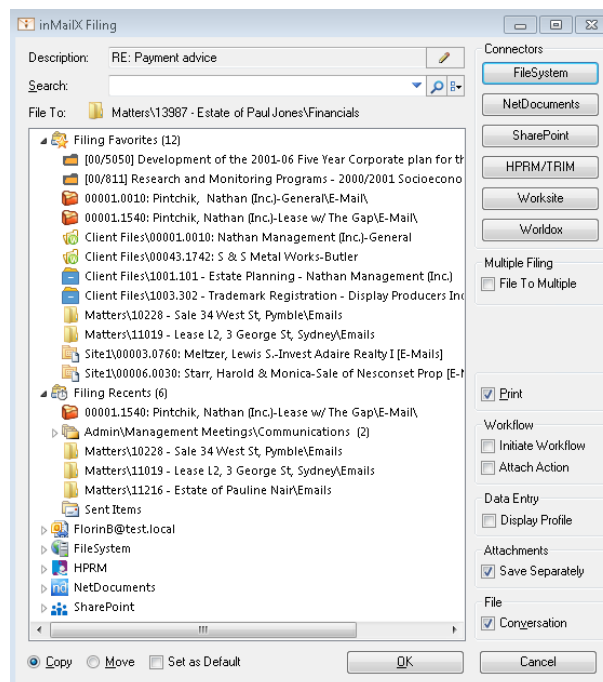
Optional Connectors

Optional inMailX Connectors are used to integrate inMailX Email Manager Module with various electronic documents and records management systems (EDRMS), enabling users to easily file emails and attachments, and improve their compliance.

Connectors are purchased and licensed separately, and they have been designed to streamline and simplify the user experience when filing outgoing and incoming emails into single or multiple electronic records and document management systems.

inMailX Connectors substantially reduce the complexity and time required by users to file and share relevant email correspondence. The integrated 'Send & Quick File', 'Quick File' or 'Close & Quick File' features reduce the number of steps taken to file emails – these common tasks are performed as one action.

With inMailX Connectors users are able to:
- 'Send & File', 'Send & Quick File' emails into single or multiple locations
- File or Quick File single or multiple incoming emails
- Build a list of Favorite EDRMS folders for quick filing and navigation
- Quick File to Favorite or Recent folders within your EDRMS
- Purge filed emails from Outlook Inbox and Sent Items folders
- Easily save attachments into Favorite or Recent EDRMS folders
- Universal folder search across multiple EDRMS repositories
- File emails into multiple repositories – multiple connectors can run side by side

inMailX Filing Window showing multiple active connectors and options available to users when filing emails.

FileSystem Connector

- Integrates Microsoft Outlook with cloud stores or network folder structures
- FileSystem store enables users to access cloud or network folders in Outlook
- Support 'Drag & Drop' emails and files into store folders within Outlook
- 'Send & File' or 'Send & Quick File' emails into existing folder structures
- 'Close & File' or 'Close & Quick File' emails, tasks, appointments into folders
- Quick File incoming emails from Outlook explorer or inMailX notifier
- File emails into multiple network or cloud folders simultaneously
- Purge Filed emails from Outlook Inbox and Sent Items folders
- Save attachments as separate documents into network or cloud folders
- Quickly save attachments into favorite or recent file system folders
- Use 'Where Filed' to navigate to the filed copy of the email
- Use 'Where Saved' to navigate to the saved copy of the attachment
- Set filename masks for standardising emails and attachments filename
- Set auto-saving paths for organising filed emails and attachments
- Enable subfolders browsing and limit browsing level
- Quick search for file system folders in Outlook
- Quick navigation to file system folders from Outlook
- Display Profile form to edit filename when filing
- Support for email duplicates detection within a folder
- Automatically categorise Filed to FileSystem emails in Outlook

SharePoint Connector

- Integrates Microsoft Outlook with SharePoint Online or On-Premises
- SharePoint store enables users to access SharePoint document lists in Outlook
- Support 'Drag & Drop' emails and files into store libraries/folders within Outlook
- 'Send & File' or 'Send & Quick File' emails into libraries, folders or document sets
- 'Close & File' or 'Close & Quick File' emails, tasks, appointments into SharePoint
- Quick File incoming emails into SharePoint from Outlook explorer or inMailX notifier
- File emails into multiple SharePoint libraries/folders simultaneously
- Use custom fields mapping to set specific values when filing emails or attachments
- Purge Filed emails from Outlook Inbox and Sent Items folders
- Save attachments as separate documents in SharePoint
- Quickly save attachments into favorite or recent SharePoint locations
- Display SharePoint document ID in Outlook for filed emails or attachments
- Display SharePoint location in Outlook for filed emails or attachments
- Use 'Where Filed' to navigate to the filed copy of the email in SharePoint
- Use 'Where Saved' to navigate to the saved copy of the attachment in SharePoint
- Set description masks for standardising emails and attachments filename and title
- Set auto-saving paths for organising filed emails and attachments
- Ability to attach SharePoint documents to emails, tasks or appointments
- Maintain list of favorite SharePoint document libraries for quick filing and navigation
- Quick search for SharePoint document libraries in Outlook
- Quick navigation to SharePoint document libraries from Outlook
- Display Profile form to edit filename, title and metadata when filing
- Support for email duplicates detection within a document library
- Automatically categorise Filed to SharePoint emails in Outlook

NetDocuments Connector

- Integrates Microsoft Outlook with NetDocuments
- NetDocuments store enables users to access NetDocuments files inside Outlook
- Support 'Drag & Drop' emails/desktop files into NetDocuments store folders within Outlook
- 'Send & File' or 'Send & Quick File' emails into workspaces or folders
- Tag outgoing emails when filed and 'Auto File' tagged replies into original workspace
- Scheduled or manual 'Auto File' of tagged emails into associated workspaces
- 'Close & File' or 'Close & Quick File' emails, tasks, appointments into NetDocuments
- Quick File incoming emails into NetDocuments from Outlook explorer or inMailX notifier
- File emails into multiple NetDocuments workspaces simultaneously
- Use custom fields mapping to set specific values when filing emails or attachments
- Purge Filed emails from Outlook Inbox and Sent Items folders
- Save attachments as separate documents in NetDocuments
- Quickly save attachments into favorite or recent NetDocuments locations
- Display NetDocuments document ID in Outlook for filed emails or attachments
- Display NetDocuments location in Outlook for filed emails or attachments
- Use 'Where Filed' to navigate to the filed copy of the email in NetDocuments
- Use 'Where Saved' to navigate to the saved copy of the attachment in NetDocuments
- Set description masks for standardising emails and attachments name
- Maintain list of favorite NetDocuments workspaces for quick filing and navigation
- Quick search for NetDocuments workspaces in Outlook
- Quick navigation to NetDocuments workspaces from Outlook
- Display Profile form to edit filename, description and metadata when filing
- Automatically categorise Filed to NetDocuments emails in Outlook
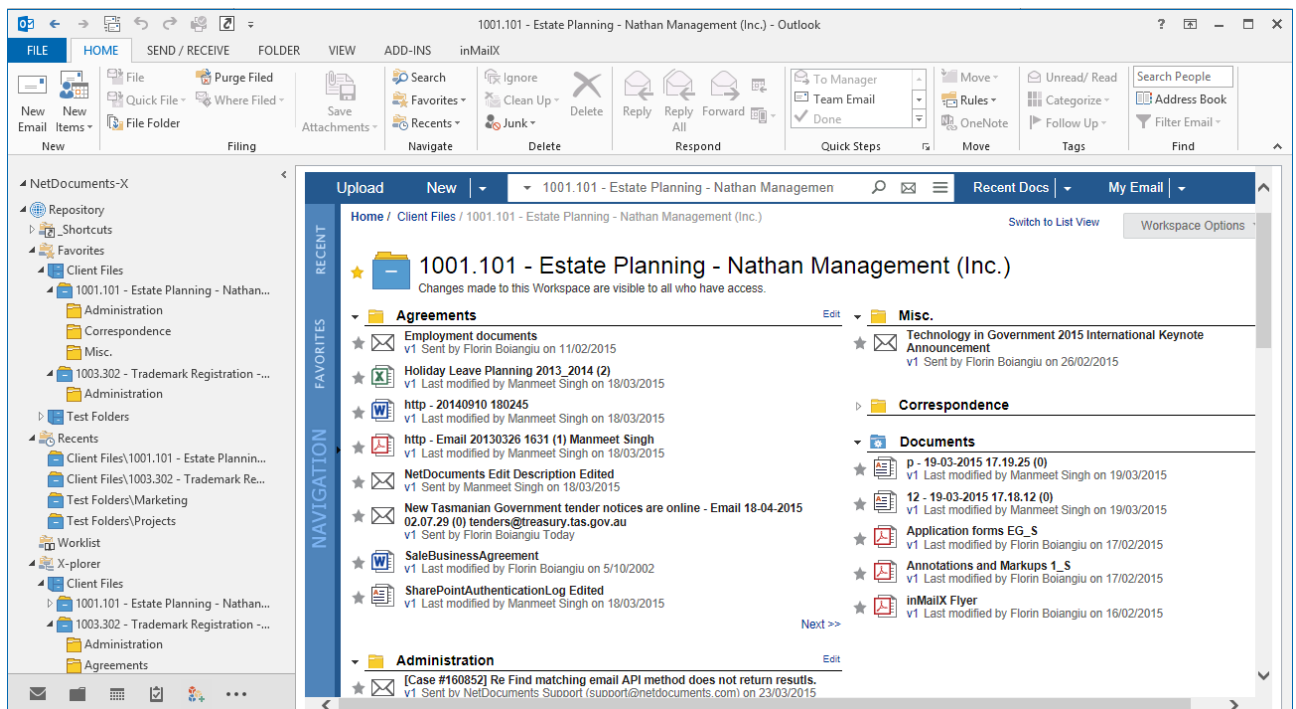
MFCM Connector

- Integrates Microsoft Outlook with Micro Focus/HPE Content Manager (MFCM)
- MFCM store enables users to access and process records and activities in Outlook
- Support 'Drag & Drop' emails/desktop files into containers within Outlook
- 'Send & File' or 'Send & Quick File' emails into containers
- Tag outgoing emails when filed and 'Auto File' tagged replies into original container
- Scheduled or manual 'Auto File' of tagged emails into associated containers
- 'Close & File' or 'Close & Quick File' emails, tasks, appointments into CM
- Quick File emails into MFCM from Outlook explorer or inMailX notifier
- File emails into multiple containers simultaneously
- Purge Filed emails from Outlook Inbox and Sent Items folders
- Save attachments as separate records and relate them to the email
- Quickly save attachments into favorite or recent containers
- Display record number in Outlook for filed emails or attachments
- Use 'Where Filed' to navigate to the filed copy of the email in CM
- Use 'Where Saved' to navigate to the saved copy of the attachment in CM
- Set description masks for standardising emails and attachments title
- Enable subject mask when filing outgoing emails into CM for common reference
- Set default record types and classifications for incoming, outgoing or internal emails
- Ability to attach records to emails, tasks or appointments
- Maintain list of favorite containers for quick filing and navigation
- Quick search for containers and records in Outlook
- Quick navigation to favorite or recent containers from Outlook
- Support for email duplicates detection at container or dataset level
- Automatically categorise Filed to MFCM emails in Outlook

iManage Connector

- Integrates Microsoft Outlook with iManage Work/Worksite
- 'Send & File' or 'Send & Quick File' emails into workspace folders
- Tag outgoing emails when filed and 'Auto File' tagged replies into original workspace
- Scheduled or manual 'Auto File' of tagged emails into associated workspaces
- 'Close & File' or 'Close & Quick File' emails, tasks, appointments into iManage
- Quick File incoming emails from Outlook explorer or inMailX notifier
- File emails into multiple workspaces simultaneously and automatically relate them
- Use custom fields mapping to set specific values when filing emails or attachments
- Purge Filed emails from Outlook Inbox and Sent Items folders
- Save attachments separately and relate them to the email
- Quickly save attachments into favorite or recent workspaces
- Display iManage document number in Outlook for filed emails or attachments
- Display iManage location in Outlook for filed emails or attachments
- Use 'Where Filed' to navigate to the filed copy of the email in iManage
- Use 'Where Saved' to navigate to the saved copy of the attachment in iManage
- Set description masks for standardising emails and attachments description
- Maintain list of favorite workspaces for quick filing and navigation
- Quick search for iManage workspaces in Outlook
- Quick navigation to iManage workspaces from Outlook
- Display Profile form to edit description and metadata when filing
- Automatically categorise Filed to iManage emails in Outlook
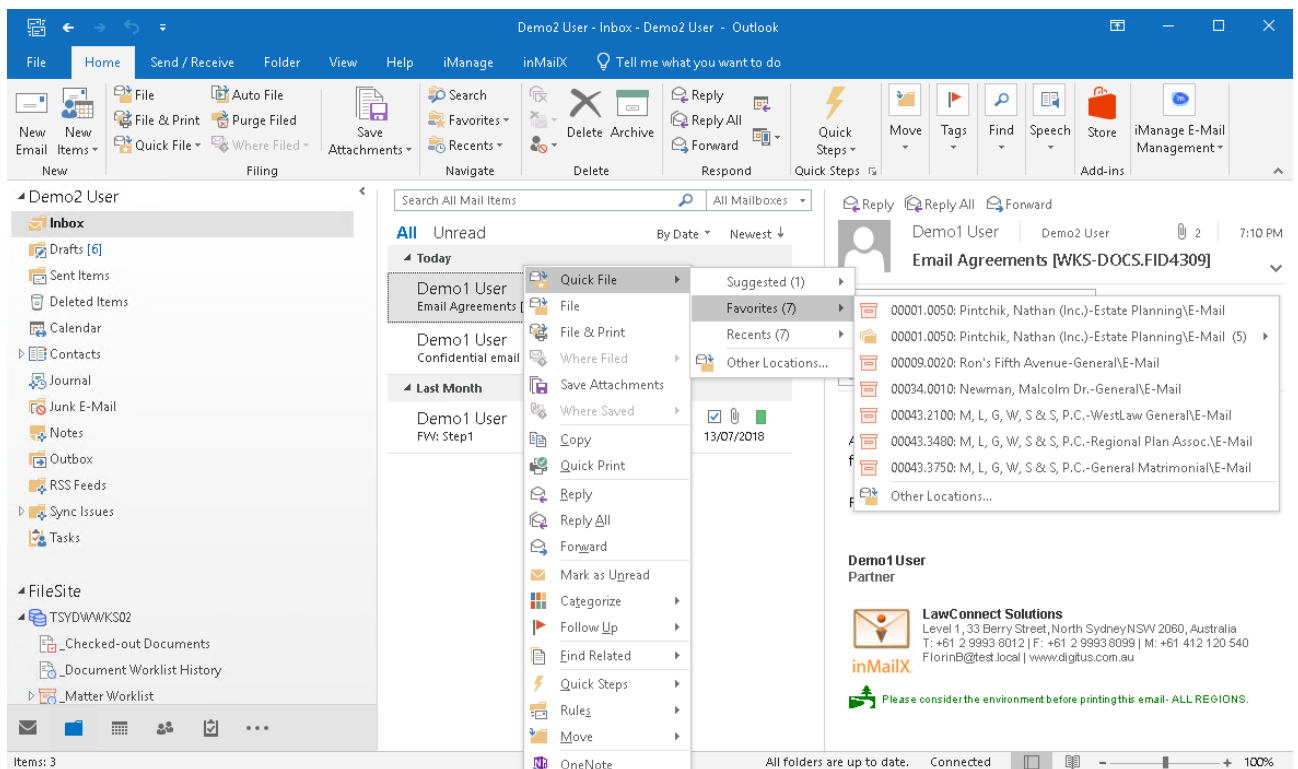
Worldox Connector

- Integrates Microsoft Outlook with Worldox GX3/GX4
- 'Send & File' or 'Send & Quick File' emails into workspaces
- Tag outgoing emails when filed and 'Auto File' tagged replies into original workspace
- Scheduled or manual 'Auto File' of tagged emails into associated workspaces
- 'Close & File' or 'Close & Quick File' emails, tasks, appointments into Worldox
- Quick File incoming emails from Outlook explorer or inMailX notifier
- File emails into multiple workspaces simultaneously and automatically relate them
- Purge Filed emails from Outlook Inbox and Sent Items folders
- Save attachments separately and relate them to the email
- Quickly save attachments into favorite or recent workspaces
- Display Worldox document ID in Outlook for filed emails or attachments
- Display Worldox location in Outlook for filed emails or attachments
- Use 'Where Filed' to navigate to the filed copy of the email in Worldox
- Use 'Where Saved' to navigate to the saved copy of the attachment in Worldox
- Set description masks for standardising emails and attachments description
- Maintain list of favorite workspaces for quick filing and navigation
- Use custom fields mapping to set specific values when filing emails or attachments
- Quick search for Worldox workspaces in Outlook
- Quick navigation to Worldox workspaces from Outlook
- Display Profile form to edit description and metadata when filing
- Automatically categorise Filed to Worldox emails in Outlook
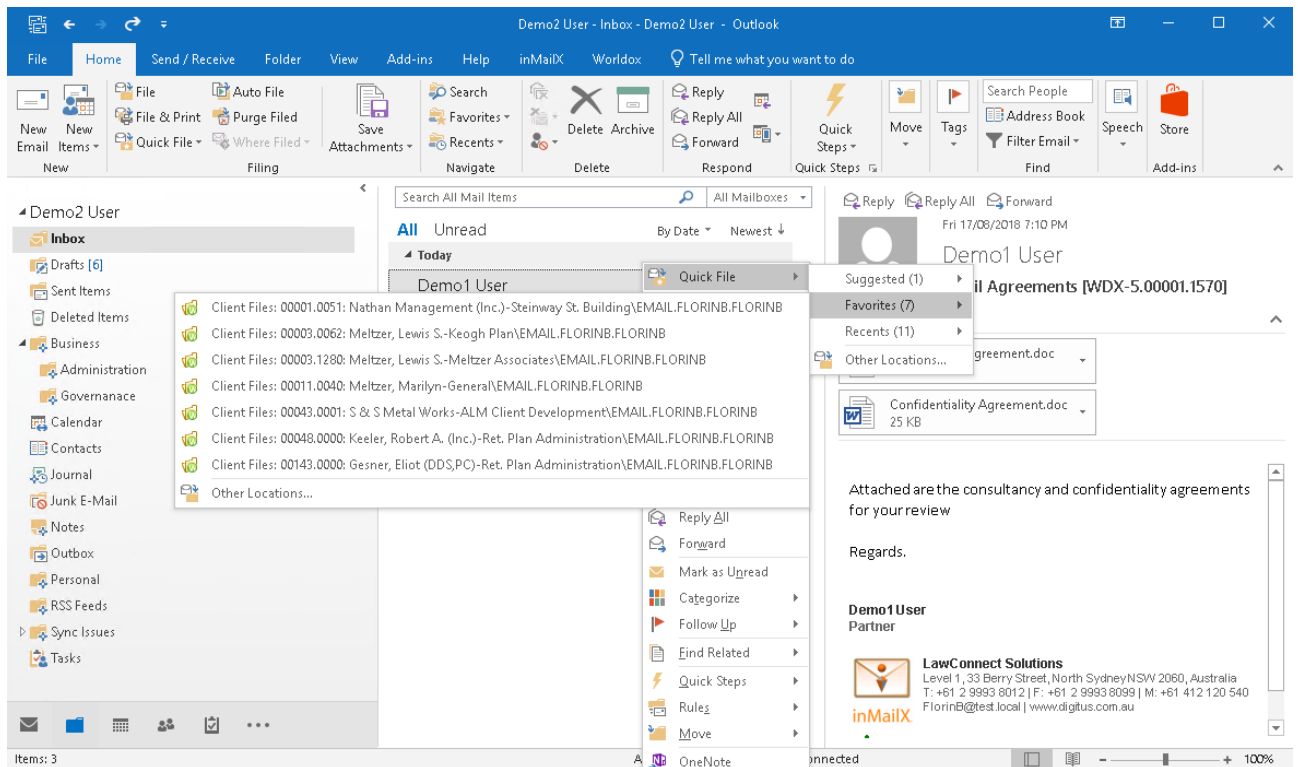
WebDAV Connector

- Integrates Microsoft Outlook with WebDAV repositories
  (e.g. Oracle UCM, WebDAV Clouds, etc.)
- 'Send & File' or 'Send & Quick File' emails into WebDAV folders
- 'Close & File' or 'Close & Quick File' emails, tasks, appointments into WebDAV folders
- Quick File emails into WebDAV folders from Outlook explorer or inMailX notifier
- File emails into multiple WebDAV folders simultaneously
- Purge Filed emails from Outlook Inbox and Sent Items folders
- Set filename masks for standardising emails and attachments filenames
- Set auto-saving subfolders for emails and attachments
- Configure multiple sites for filing emails and attachments
- Enable subfolders browsing and limit browsing level
- Quick search for WebDAV folders in Outlook
- Quick navigation to WebDAV folders from Outlook
- Support for email duplicates detection within a folder
- Automatically categorise Filed to WebDAV emails in Outlook

Solution Benefits

inMailX enables users to efficiently manage their emails and attachments; Clean, PDF, ZIP, Rename, Reorder attachments on the fly; Combine and secure multiple attachments into a single PDF; reduce paper wastage by truncating email printing to the most recent conversation threads.

Some of the immediate benefits that your users and organisation will get from implementing inMailX are:

Empower Users and Save Time
- Simple and intuitive email filing workflows
- Save attachments into single or multiple locations
- Active and passive conversion of email attachments into PDF
- Order, bookmark and combine multiple attachments into a single PDF
- Remove metadata from World, Excel, PowerPoint, PDF and Image attachments
- Password protect Word, Excel, PowerPoint and PDF attachments
- Rename and Reorder email attachments on the fly
- Compress attachments into ZIP while composing emails
- Quickly Undo or Redo attachments formatting actions to rectify errors

Increase Productivity and Reduce Costs
- Streamline emails and attachments management
- Easily file emails into multiple locations or folders
- Quickly save attachments separately to the email
- Efficient and intuitive Clean, PDF, Protect, ZIP, Rename, Reorder
- Flexible Undo, Redo to quickly rectify user errors
- Minimize typing recurrences with personal and global content
- Streamline emails printing and reduce paper wastage
- Minimize staff training requirements
- Reduce Outlook add-ins and administration overheads

Enforce Corporate Policies and Mitigate Risk
- Activate Recipients and Attachments checking on send
- Force users to file emails on send
- Prompt users to clean attachments metadata when sent externally
- Prompt users to convert attachments to PDF and apply restrictions
- Password protect confidential attachments on the fly
- Set global PDF conversion and password complexity policies
- Standardize email communication with global content
- Manage email signatures using common signature templates

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