

Comparison of E-Mail Management Products

Key	
●	<i>Present</i>
◐	<i>Partially Present</i>
?	<i>Unknown</i>

DocAuto OutiM Server 3.x	WorkSite EMM 8.x
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General Features		
Works on Windows XP, Server 2003, and/or Virtual Hardware	●	●
Uses WorkSite 3-Tier Architecture	●	●
Allows Messages to be Accessed from Either Outlook or WorkSite	●	
Can Replace Outlook Messages with NRL Files	●	
Can Set Flag Status on Messages	●	●
Can Set Flag Text on Messages	●	
Allows for "Courtesy Copy" of Message	●	●
Allows for Multi-Step Workflow processing of Messages	●	
Works in Matter-Centric Environments	●	●
Works in Non-Matter-Centric Environments	●	
Processes Messages Using Send and File "Firm Identifiers" in Subject Line	●	●
Supports Discontinued Firm Identifiers	●	
Supports Multiple Firm Identifiers per Database	●	
Supports Processing Messages Sent to EMM Addresses	●	●
Supports Multiple EMM Domains per Server/Database	●	
Supports Multiple EMM Addresses per Message	●	
Supports Multiple Different Configurations Running Simultaneously	●	
Client Utility		
Optional – E-Mail Processing can be done without client utility installed	●	●
Integrates with DeskSite and FileSite	●	●
Provides for Predictive filing of Messages		●
Prompts User for Filing Location When Sending		●
Processes Messages from Sent Items	●	●
Creates Matter-Centric Filing Structures for Messages in Outlook or Exchange Public Folders Based on WorkSpace Metadata from one or more WorkSpaces or WorkSpace Shortcuts	●	
Creates Matter-Centric Filing Structures for Messages in Outlook or Exchange Public Folders Based on WorkSpace Metadata from one or more Categories	●	
Creates Matter-Centric Filing Structures for Messages in Outlook or Exchange Public Folders Based on WorkSpace Metadata from one or more My Matters Containers or Subscriptions	●	
Creates Matter-Centric Filing Structures for Messages in Outlook or Exchange Public Folders Based on WorkSpace Metadata from one or more Documents or Document Shortcuts	●	
Allows Users to Process Messages While Working Offline	●	
Server Utility		
Requires WorkSite Communications Server		●
Links Exchange Folders to WorkSite Folders by User-Visible Metadata, not System ID Numbers	●	
Links Exchange Folders to WorkSite Folders by System ID Numbers, not User-Visible Metadata		●

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	DocAuto OutiM Server 3.x	WorkSite EMM 8.x
Works on Windows XP or Server, VM or Dedicated Hardware	●	◐
Processes Messages Folder-To-Folder	●	●
Processes Entire Mailboxes	●	
Processes Public Folders	●	
Processes PST Files	●	
Processes Password-Protected PST Files (Password required)	●	
Allows Selection of Specific Mailboxes to be Processed	●	
Allows Selection of Specific Folders to be Processed	●	
Processes Inbox and Sent Items	●	●
Processes Other Message-Type Folders	●	
Processes Subfolders	●	
Processes Non-Message Folders (Contacts, Notes, Tasks, Calendar)	●	
Processes User-Defined Folders	●	
Processes NRL files	●	
Provides for Multi-Level "Mapping" to Find Appropriate WorkSite Destination	●	
Can Route All Content from Multiple Sources to a Single "Default" Location	●	
Processes Content Mailbox-by-Mailbox	●	
Can Recreate Source Folder Structures in WorkSite	●	
Sets Metadata on New Folders	●	
Sets Security on New Folders	●	
Dynamically Finds Filing Destination based on PST File Metadata	●	
Dynamically Finds Filing Destination based on Folder Metadata	●	
Dynamically Finds Filing Destination based on Message Metadata	●	◐
Can Dynamically Create New Destination Filing Structures Under WorkSpaces	●	
De-duplicates Messages	●	●
De-duplicates by Multiple Metadata Values	●	
Post-Processing: Deletes Messages Based on Whether or Not Message Has Attachments	●	
Post-Processing: Supports Soft delete, Hard Delete, or Move to Trash	●	
Turns Off Read Receipts When Processing Unread Messages	●	
Post-Processing: Dynamically Adds Any WorkSite Metadata to Message Follow-Up Text	●	
Post-Processing: Can Replace Previously Imported Messages with NRL Files	●	
Content Filtering Capabilities		
Date Created (Before/After Date, Before After X Days, Date Range)	●	
Date Received (Before/After Date, Before After X Days, Date Range)	●	
Date Edited (Before/After Date, Before After X Days, Date Range)	●	
Subject Line (Inclusionary/Exclusionary)	●	

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Specific Address or Domain Information (Inclusionary/Exclusionary)	●	
Message Body (Inclusionary/Exclusionary)	●	
With/Without Attachments	●	
Attachment Size	●	
Flag Color	●	
Follow-Up Flag Status Text	●	
Content Type (Message, Appointment, Contact, Note, NRL, etc.)	●	