



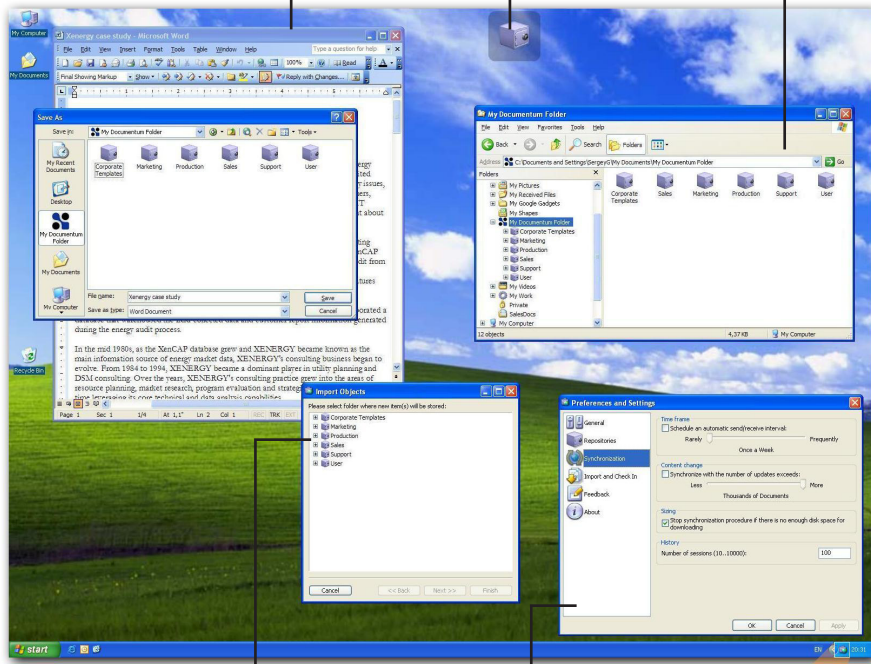
# SmartFolder for Documentum

## Quick Reference

"Save As..." dialogs are equipped with My SmartFolder shortcuts, decreasing the number of clicks to reach your Documentum repository.

The semi-transparent wided DropZone staying on top to allow you to attach the documents from anywhere with a single move of a mouse. It can be docked to the screen edge and turned to auto-hide mode if necessary.

A group of Windows folders stores all of your corporate documents and keeps them updated and organized, corresponding to the company's entries in Documentum.



Check in/Check out and Document Listing operation Support

Sophisticated attributes management

Special folders on the desktop to allow instant access to

- recently imported
- edited
- checked in documents

A pop-up window automatically lists the Documentum cabinets and folders which are most relevant to the content of the documents being attached.

The synchronization setup is very simple and human-friendly. Selective sync operation is also available for instant synchronization.

An application icon within the taskbar notification area displays the connection and synchronization status



# Concept

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## Things that make Document Management transparent

Files and Folders Metaphor	<b>SmartFolder</b> uses native Windows folders to represent Documentum entries such as: Inbox, Cabinets, Folders, etc. These entries are easily recognized by the same personalized icons used in Documentum.
Always Organized Structure	You no longer need to worry about keeping your documents in order. <b>SmartFolder</b> will keep Folders updated according to Cabinets in Documentum.
Background Synchronization	The automatic synchronization can be configured to run in the way most convenient for you – and as frequently as required. It can also be programmed to start whenever a connection to Documentum is restored or documents in <b>SmartFolder</b> are updated.
Selective synchronization	Selective sync operation allows a user to instantly synchronize a number of selected documents with the repository.
Documents Check in/Check out	<b>SmartFolder</b> supports document checkin/checkout right from the Local Storage. As a result of the operation documents are synced with the global Repository.
Free disk space control	<b>SmartFolder</b> provides automated free space control capability and returns a user a number of options if available space is not enough to complete the operation.
MS Outlook Integration	<b>SmartFolder</b> provides tight integration with Outlook to enable easy message and attachment import. The format of imported messages and mapping of message attributes to created document properties can be flexibly set.
Collision resolution	Concurrent work with the same documents often implies conflicts of different types: concurrent changes, insufficient rights, changed document status, etc. <b>SmartFolder</b> automatically detects such collisions and provides extended capabilities for conflict resolution.
Shortcuts to Updates	With <b>SmartFolder</b> , it is possible to enable shortcuts, created in My SmartFolder, to updated or newly created documents attained as a result of synchronization in order to have the most pertinent documents immediately available.
Windows Shell Extensions	To simplify access to Documentum content, “My SmartFolder” links can be created from the Windows Explorer Menu “Send to” function, as well as in the dialog box “Save As” in Windows XP and Microsoft® Office 2003 applications.



# Concept

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## Things that make Document Management transparent

### DropZone Widget

Sometimes there are so many windows open on the desktop that it is impossible to find the right folder. **SmartFolder's** semi-transparent DropZone widget is always on the top of other windows and allows the user to send any document from any application to Documentum with single move of the mouse. All you have to do is to drag and drop the document to the DropZone. This widget can be placed anywhere on the desktop, snapped to the edge, or be made to disappear and automatically appear when a document is dragged toward it.

### Windows XP Design

**SmartFolder** is designed to comply with Microsoft Windows XP Visual Guidelines. We used the newest solutions and technologies to achieve a high level of interactivity, and comfortable usability.

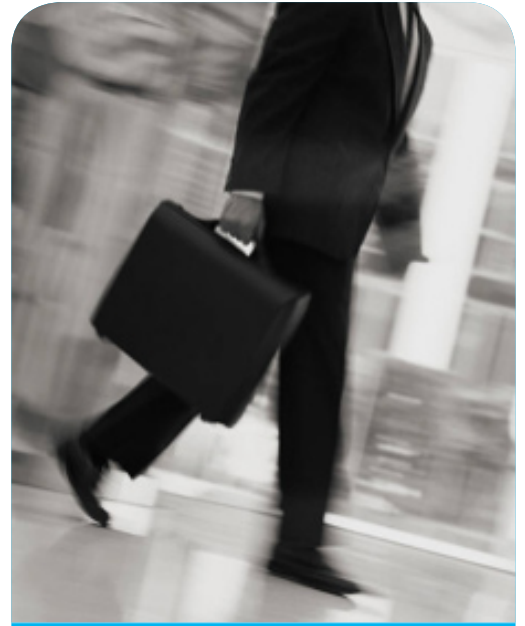


# Usage Scenario

## Marketing Collateral Distribution



Kim Slater is responsible for the creation and distribution of marketing materials. She needs to verify the latest versions of the documents and save them on her notebook. She is working on the latest version of a new product presentation.



Joe Smith, a sales guy, is flying to San Francisco tomorrow to present new product to the IBM sales team.

She publishes the latest version of the presentation in My SmartFolder on her notebook inside the Documents folder

Product Presentations are synced with Documentum and stored under Marketing Cabinet in the Folder called "Company Presentations"

The Presentation is automatically delivered to Joe's notebook and those of the other sales people, along with other updated marketing documents

## Value

- Immediate local access to copies of corporate marketing materials
- Online access to a corporate portal is not required to get the latest documents
- Sales People stop harassing the Marketing department and function more independently



# Usage Scenario

Working on sales documents offline



Joe Smith is flying to San Francisco to demonstrate a new product to the IBM sales team. Before arriving he must draft a new proposal for IBM. As usual, Joe is late in leaving for the airport, he quickly undocks his notebook, and rushes to catch his flight. He faces a long flight and the potential for 6 hours of work.

Through **SmartFolder**, all of his sales documents are synced and available on the notebook without Joe's involvement

He looks for samples of previous proposals and chooses the best one. During his long flight he writes the proposal.

When he lands and connects to Internet, the proposal is synced and distributed to other team members for their attention and review

The Proposal is stored on **Documentum** as well

## Value

- No need to think about which documents he should take with him
- No need to worry about document distribution among the sales team
- No need to spend time storing a document on **Documentum**



# Usage Scenario

Sales documents exchange within sales team



Joe Smith is working on a new set of documents for a new customer. This customer has special requirements, and the standard company templates can not be used. After several weeks, money spent on lawyers, and countless reviews, the documents are ready.

All documents are stored from the outset in My SmartFolder.

All documents are synced with the notebooks of other sales people without Joe's involvement, and they are made aware of the new company asset developed for the new customer.

These documents can be immediately used by the sales team for other current, or potential customers.

In the meantime, all synced documents are stored at Documentum automatically, without having to prompt the Sales person

## Value

- All corporate knowledge is stored and shared
- The sales teams' best work becomes the standard in use
- No additional work or headaches to keep corporate knowledge up to date



# Usage Scenario

Exchange between sales manager's computers



Joe Smith loves to work at home. The silent environment helps him concentrate on his business tasks. Joe hates notebooks and uses any opportunity to work on his super home PC. He is currently using USB keys, his home network, and other means, trying to sync his documents between home and office.

After installing **SmartFolder** on his home PC, the problem is solved.

All documents are synced automatically and he always has the latest documents at home.

## Value

- **SmartFolder** enables him to concentrate on his work without spending time on the document sharing process
- **SmartFolder** gives sales managers the ability to work anywhere and anytime which creates additional value for the corporation
- Solves the sales manager's personal problem while the company seamlessly preserves corporate knowledge



# Usage Scenarios

## Sales document back-up



Joe Smith has come to Bogota, Columbia to run presentations about a new product for a potential customer. His notebook is stolen from his car. All documents for the presentations are lost.

Joe rushes to the nearest electronics store and buys a new notebook.

In the hotel, he connects to the Internet and downloads **SmartFolder**.

After only a few minutes, all of his sales documents are downloaded and his new notebook is ready for the presentation

## Value

- Saves sales managers time normally spent on back-up operations
- Eliminates the need for endless shelves of archive CDs
- Eliminates the need to interact with internal IT people for back up operations
- Protects sales managers and the company from accidental damage



# Custom SmartFolder Implementations

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Documentum deployment in your corporation implies numerous customizations to address workflows and access policies, specific to your business needs.

However **SmartFolder** comes as an out-of-the-box solution with the baseline functionality, covering standard workflows, it's easily customizable to reflect Documentum deployment and implementation particularities, specific to your business model.

Let **SmartFolder** transparently drive your corporate document management flow and make it easier for users to follow your corporate policy!



# About

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## The origin of transparent Document Management

**Why SmartFolder?** Because we are Documentum partners and users too. While Documentum provides great document and content management services, we were struggling to motivate company employees to keep their documents on Documentum instead of the file system of their notebooks. Realizing that the solution would have to be easy to use as well as require the bare minimum interaction from the user, SmartFolder was designed as the solution.

**About InvisibleCRM** InvisibleCRM, named as a Cool Vendor by Gartner, is a technology provider of tools engineered to increase user adoption and ROI of enterprise applications. InvisibleCRM was launched in 2005, and in just one year, it invented and turned into reality an ecosystem of revolutionary products, entered into partnership agreements with a number of leading business application vendors. Most notably, InvisibleCRM have designed and delivered solutions for salesforce.com, SugarCRM, Webex, EMC Documentum and Amdocs. According to Nucleus Research InvisibleCRM products offer unique "5 hour ROI".

### Contacts



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