

# eDOCS Connector for Passport<sup>®</sup>

Wolters Kluwer's ELM Solutions' OpenText eDOCS Connector empowers Passport clients to leverage eDOCS to efficiently manage and organize high volumes of matter-related emails and documents, such as depositions, briefs, contracts, and affidavits. Staff can quickly locate the documents they need, and teams can easily collaborate and share essential information.

The connector establishes communication between Passport and eDOCS, supporting the comprehensive management of emails and documents, and their associated matters directly from the Passport user interface or the Microsoft Office Suite, including Outlook (requires Passport Office Companion).

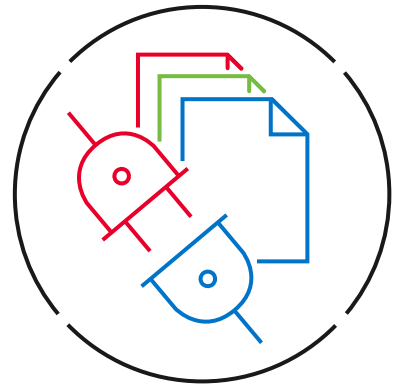
## Key benefits

- Seamless integration for user-friendly control over matter-related documents and emails
- Search, store, and work with documents in eDOCS without leaving Passport or Outlook
- Scalable to easily manage millions of documents

## Key features provided by the connector

*Direct access from Passport to documents and emails stored in eDOCS workspace*

- Upload/attach documents to be stored in the eDOCS DMS, and associate to matter, people, organization, and invoice records
- Drag and drop documents and emails from Passport Office Companion or Windows desktop and Office applications to matters or document folders
- Search for, view, access, and download all Passport-entity related documents, such as invoices, depositions, contracts, briefs, etc.
- Add and reorder columns while in a documents list view and save custom filtered views of document lists



The eDOCS Connector brings together the industry-leading matter management capabilities of Passport with the scalability and configurability of Microsoft's web-based platform.

- The Passport security framework ensures users only have access to appropriate records and documents.

*Create folders and subfolders to organize documents and emails*

- Allows the storage of documents across multiple eDOCS workspaces
- Manage matter-related email messages and email folders stored on an eDOCS server from Passport or Outlook
- Supports archive and purge capabilities for documents and folders from within the Passport application

*Collaborate and share information more easily and efficiently*

- Easily check-in and check-out documents to provide concurrency control
- Supports preservation of multiple versions of a document on the eDOCS server
- The eDOCS Connector provides Passport REST API methods to create, modify, and delete Passport documents and folders

Staff can quickly locate the documents they need, and teams can easily collaborate and share essential information.



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