Brügmann

PatOrg Outlook Plugin

PatOrg's Outlook Plugin seamlessly integrates with Microsoft Outlook. It facilitates to import incoming and outgoing emails in PatOrg's document management system. Moreover, emails can be automatically generated from predefined templates. PatOrg's Outlook Plugin let users search and view documents stored in PatOrg's document management system. Documents can be easily selected and attached to new emails.

Automatic email generation

PatOrg provides to generate sophisticated emails based on Outlook Drafts and PatOrg Script. Templates can be easily created and modified by skilled paralegals. Definition of templates is easy done and does not require any knowledge about VBA or SQL. By means of workflows PatOrg is also capable to generate automatically emails along with other Word documents, convert them to PDF and attach them subsequently in one step. Optionally attachments can store in a zip archive. In addition, PatOrg offers to generate and attach iCal/ics files based on due date records that can be imported in standard calendar software as e.g. Outlook or GoogleMail by recipients.

To generate emails PatOrg does not use Outlook which makes it very fast. Even complex emails can be thus created in seconds. Once an email is successfully generated, PatOrg passes it to Outlook.

PatOrg's Outlook Plugin supports even live interpretation of PatOrg Script. On demand instructions are interpreted potentially considering data of records beforehand assigned to the email as e.g. case/person/due date records. The instruction §CLIENT_REF§, for example, simply provides to put in client's file reference.

Sent emails can be automatically stored in PatOrg's document management system and assigned to the respective case and person records.

Import of emails and attached documents

PatOrg's Outlook Plugin automatically suggests assignments to case and person records. For this, email addresses are compared and any textual information is evaluated (including all attached documents) with respect to case references. Users may manually add further assignments or remove proposed ones. To ease manual assignment PatOrg's Outlook Plugin is featured with autocomplete search for case and person data.

At the instruction of import, PatOrg stores an email in its document management system and completes all approved record assignments. Enclosed documents can be detached from emails and imported in the same way.
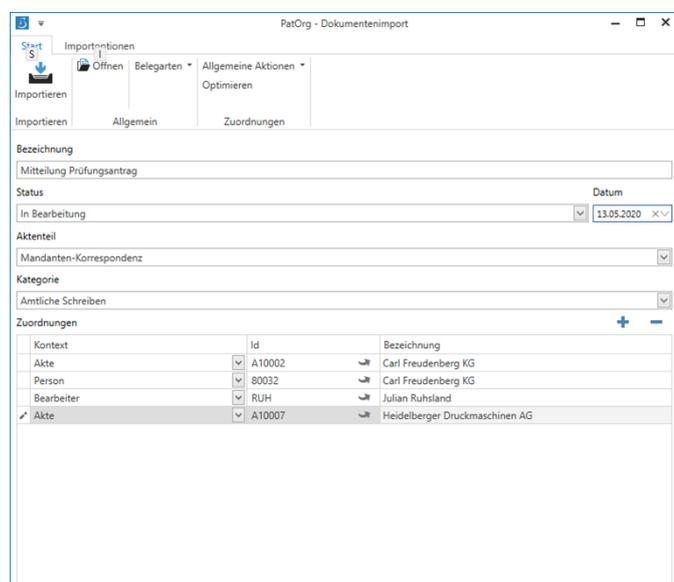
Imported emails regardless of whether incoming or outgoing are signed in a special column in Outlook's message list pane.

Duplicate checking

Before importing an email or other kind of document PatOrg's document management system checks whether it is already available based on checksum comparison. In case of emails this is done for the email itself and moreover separately for every attached document if any. If found PatOrg's Outlook Plugin shows the respective document record and proposes additional assignments to cases or persons provided that the email includes new information in this regard.

Document management integration

PatOrg's Outlook Plugin adds two virtual folders to the navigation pane connecting PatOrg's document management system to Outlook. The folders allow for accessing documents via both case and person records. When the user selects one of the folders, PatOrg's Outlook Plugin shows a pane providing the following functions.