

# Managing e-mails with routine

E-mail management - much more than just archiving

Bochum,  
November 20, 2019



# Agenda

01

## Why E-mail Management

Requirements for an e-mail management tool

02

## Requirements of the GoBD

Processing and archiving e-mails

03

## ECM Integration

Complete and seamless Outlook integration

04

## windream E-Mail Management LIVE

01

# Why E-mail Management





## Why E-mail Management

- ✔ 70 - 80% of corporate communications
- ✔ Archiving and recording obligations
- ✔ Commercial and business letters
  - Orders, commissions, ...
- ✔ Storage in original form
- ✔ Transaction-based storage
- ✔ Transparent & efficient access

02

## Requirements of the GoBD



# Bitkom and VeR Guide to E-Mail Processing and Archiving

E-mails which serve as a means of transport do **not** need to be saved.

- ✔ E-mails must be retained if they fulfil the function of business letters.
- ✔ E-mails have to be stored electronically, printing on paper is not enough.
- ✔ File attachments must be kept in their original form
- ✔ E-mails must be archived without changes. Storage in a file folder is not sufficient for this purpose.



## Bitkom and VeR guide to E-Mail Processing and Archiving

- ✔ The handling of e-mails must be documented. A third party must be able to understand the procedural documentation.
- ✔ E-mails are subject to the right of access to data by the tax auditor.
- ✔ Tax -relevant e-mails should be kept separate from other e-mails.
- ✔ Invoices as e-mails are permitted

03

## ECM Integration in Outlook







# ECM Integration in Outlook

- ✓ Complete and seamless Outlook integration
- ✓ No need to learn a new interface
  - Maximum user acceptance
- ✓ Direct storage in the corresponding files
- ✓ Direct access to all ECM functions in Outlook
- ✓ Secure storage of e-mails in windream
- ✓ Automatic filing of e-mails
- ✓ Structured searches via e-mails and attachments



100% windream  
100%integrated  
100% ECM

# ECM Integration in Outlook

windream.CON 2019 (20191120) - windream ECM-Erweiterung - Outlook

DATEI | START | SENDEN/EMPfangEN | ANSICHT | WINDREAM

Neu | Löschen | Antworten | Verschieben | Regeln | Ungelesen/ Gelesen | Kategorien | Zur Nachverfolgung | Personen suchen | Adressbuch | E-Mail filtern

**Favoriten**

- Posteingang 400
- Gesendete Elemente
- Gelöschte Elemente 9
- demo@mustermann...
- Posteingang 400
- Entwürfe [5]
- Gesendete Elemente
- Gelöschte Elemente 9
- Junk-E-Mail
- Newsletter 89
- Postausgang
- RSS-Feeds
- UTF-8
- Suchordner
- windream ECM-Erwe...
- windream
  - My windream
  - windream (Lokal)
    - Kunden
    - Projekte
      - Ausschreibung ECM...
      - Demo Projekt
      - DFC 2019 Essen (20...
      - windream 5.5 Dem...
      - windream 6.5 Dem...
      - windream.CON 20...
      - 09-Präsentation

Dateiname	Objekte	Projekt	Projektname	Status
Microsoft Excel-Arbeitsblatt (1)				
Installations- und P...	Stan...	-	-	-
Microsoft Word-Dokument (7)				
windream_Basicins...	Stan...	-	-	-
windream_Basicins...	Stan...	-	-	-
windream_bizhub...	Stan...	-	-	-
windream_BPM_Ins...	Stan...	-	-	-
windream_Exchange...	Stan...	-	-	-
windream_Imaging...	Stan...	-	-	-
windream_Proxy_S...	Stan...	-	-	-
Microsoft PowerPoint-Präsentation (1)				
E-Mails routiniert ...	Proje...	windream.CON 2019	20191120	-

**E-Mails routiniert managen**  
E-Mail-Management ist viel mehr als reine Archivierung  
Bochum, 20. November 2019  
Windream

Ordner E-Mail Kalender Personen windream ...

ELEMENTE: 0



03

# ECM Integration in Exchange



# ECM Integration in Exchange

- ✔ Automatic Exchange Journal e-mail archiving
  - Also possible with Exchange 365 Online
- ✔ Rule-based e-mail archiving / rule wizard
- ✔ Transparent access rights
- ✔ Direct storage in the corresponding files

Visit also  
“Mails in  
the cloud“

02:15 p.m.

04

windream E-Mail  
Management LIVE



# windream Exchange

More than just e-mail archiving



## Full integration

No new working environment.  
Transparent filing and access to all information



## Relief of the mail server

Duplicated information is avoided. Mailbox sizes are reduced.



## Speed

Advanced search options.  
Quick full text search.  
Shorten backup and restore times



## Compliance

journal archiving and mailbox archiving are legally compliant

Danke



**windream** GmbH

**Rasmus Spaller**

Business Alliance Manager



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Noch Fragen?

