

● PRODUCT DATA SHEET

Doxis SmartBridge for Microsoft 365/Teams – Bi-directional Microsoft Teams integration

Doxis SmartBridge for Microsoft 365/Teams combines ad hoc collaboration and real-time communication in Microsoft Teams with intelligent information management and business processes in Doxis. In this way, companies maintain control over their content and ensure secure collaboration. The SER solution supplements the Microsoft application by making Doxis functions available in Teams and by ensuring that Teams content and chats are securely stored in the correct context in Doxis.

360° view of projects and business partners

Teams users obtain direct, convenient access to information that is relevant to their respective task – in context and beyond the Microsoft silo. While users work in their familiar Teams environment, Doxis serves as a cross-system information pool and provides the users access to additional sources of information, such as ERP, CRM, HR, Office, specialized applications in the company, and more. In this way, it provides a 360° view of all relevant information from directly within their familiar Teams working environment.

Interactions between Doxis & Teams

Doxis features are seamlessly integrated in Microsoft Teams – Teams users can use special tabs in their channels to directly access Doxis content, such as eFiles, workbaskets and documents that are related to the current context. Users can also use the integrated Doxis search to find documents in Doxis that are related to the respective context in Teams or the Teams channel. The search results are displayed in a result list directly in Teams. Doxis can also optionally notify users when documents, eFiles or tasks are created or modified. The notifications can be sent to Doxis workbaskets or to Teams channels.

Access to Teams content from Doxis

Even users who do not have a Teams login can access the data and documents that were transferred from Teams to Doxis, including chat history and recordings of meetings.

Archive and manage Teams content in Doxis

Doxis SmartBridge for Microsoft 365/Teams can archive Teams content, such as chats, individual messages or recordings, in Doxis either through manual input or based on a set of rules. In Doxis, the content is stored long-term in line with regulatory requirements. Documents that are modified collaboratively in Teams are versioned when they are stored, and retention rules are added when required. In this way, all editing stages are transparent for all users. Content is stored by linking a Team or channel with a Doxis eFile. Files from Teams can be filed directly to a specific folder within the eFile. In this way, the content is stored in the appropriate context.

Doxis SmartBridge for Microsoft 365/Teams

The Doxis connector connects Doxis to Microsoft Teams and supports diverse use cases. The time and effort required for implementation vary by use case.

Add-on solution

Doxis Archive: Solution for archiving information from diverse sources (e.g., ERP, CRM, HR systems) for defined and undefined periods of time (primary key archive)

Doxis SmartBridge for Microsoft 365/Teams is also a component of the “Doxis Content Bridge for SAP and Salesforce” solution.

Doxis SmartBridge for Microsoft 365/Teams – functional scope

360° view of projects and business partners

- Doxis brings together information such as emails, contracts, invoices and more from Teams, ERP, CRM, Office and specialized applications in Workspaces
- With Doxis Workspaces, Teams users obtain a comprehensive view of processes, projects and business partners
- The content stored in the Workspace can be accessed without the respective source systems

Manage Teams content in Doxis

- Archive documents, chats, individual messages or recordings from Teams in Doxis manually or automatically
- Transfer metadata about messages and documents from Teams to Doxis
- Assign documents/files from Teams to a Doxis Workspace or subfolder
- Use age, size and document type as criteria for rule-based archiving of messages/documents in the background
- Combine messages with replies as a chat in a Doxis document
- Jump directly from messages stored in Doxis to the original chat in Teams

Use Doxis functions in Teams

- Display Doxis eFiles, documents and (group) workbaskets that relate to the respective Teams channel in the Teams user interface
- Open a Doxis search in Teams to find Doxis content that relates to the respective Teams context or channel
- Receive Doxis notifications (e.g., about eFile or document subscriptions) directly in Teams
- Archive embedded content and file attachments as partial document along with the actual message