



# E-mail management in TRIM Context 6

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Date: March 2006

## Introduction

Electronic mail has become the single most important form of digital communication in the modern workplace. Volumes of e-mail received by a modern organisation have increased exponentially, and important business negotiations and decisions are increasingly being made in this digital format. The popularity of the medium and importance of the information it conveys raise the very real question of how best this data should be managed. Many companies have stepped forward to offer an easy fix in automated server-side classification of e-mail. TOWER Software believe that far from being an e-mail management panacea, purely automated solutions can create as many problems as they solve. Instead, TRIM Context 6 responds to the challenges presented by e-mail management by fully integrating e-mail management into its industry-leading enterprise content management system. As a result, it gains the scalability, manageability, and records-management advantages that only a mature, proven ECM solution can provide. This white paper will discuss the particular challenges presented by e-mail management, and the ways in which TRIM Context 6's approach helps to alleviate them.

## The e-mail challenge

The ever-increasing burden of e-mail passing through corporate networks poses a number of challenges. These may be summarised as bulk, searchability, authenticity/reliability, retention and, business processes.

E-mail management is partly a challenge simply because of the enormous number of e-mails which must be processed on any given day, and vast amount of e-mail which must be stored. Despite this, it hardly requires stating that the majority these e-mails are wholly useless from a corporate perspective. Junk e-mail, personal correspondence, and office banter clog corporate systems with relevant information. In light of this, any solution which can reduce the number of useless e-mails captured while ensuring the capture of the really important messages will offer both short and long-term scalability and expense advantages.

Searchability of e-mails is a challenge because of the sheer bulk of e-mails captured. The numbers of e-mails which are responsive to simple queries may be completely overwhelming to the user. There are a number of possible remedies to this problem. The most obvious solution is simply to reduce the number of irrelevant e-mails captured into the system. This can, for example, help to reduce the frustration of a Human Resources manager who runs a search on annual leave and discovers e-mails about great aunt Gertrude's weekend at Las Vegas. A more effective solution lies in the addition of rich metadata to e-mails, captured from the headers and user input, allowing for the construction of much more complicated and pointed search queries. This utilisation of metadata for search queries may be further bolstered by full-text indexing of the e-mails. Thus, our HR manager might exclude all e-mails which were not sent internally within the company, or perhaps her section. Finally, searchability can be enhanced by the addition of structure and hierarchy to the e-mail repository, along the lines of a traditional records filing system. This allows searches be very quickly refined to restricted areas of an organisation's activities even before search terms are constructed based on metadata. Records management nirvana is achieved by our HR manager, who can now restrict her search to the annual leave file in the HR department, virtually eliminating the possibility of false positives.

Finally, in a legal climate in which e-mails have definitively moved into the realm of discoverable evidence, companies need to be able to manage e-mail information in accordance with the same retention schedules and business rules as all other corporate information. Simply automatically classifying all e-mails does not allow the enterprise to distinguish between those e-mails with added legal significance which must be retained for extended periods, and the vast bulk of corporate communications, which will never be relevant to any action, and need not be retained for extended periods. The result is that in the absence of some kind of system for distinguishing meaningfully between

e-mails, the e-mail repository must be kept complete for a period of time equal to the longest legal obligation. This is clearly a sub-optimal position given the bulk of e-mails contained in a e-mail repository. Classification and explicit declaration of retention periods for e-mails are the obvious answer to this problem. They allow the organisation to assign retention schedules to kinds of documents generally, and to specific documents if necessary, reducing the risk of legally important documents being destroyed.

E-mail management thus involves a number of knotty problems for enterprises, which cannot simply be swept under the rug through server-side automated capture of e-mails. TOWER Software believe that they have provided a solution to these issues by bringing electronic mail into the enterprise content management system as a first-class citizen.

### **E-mail management in TRIM Context 6**

TRIM Context 6 provides enterprise-level tools for management of e-mails. As such, e-mails receive all the benefits of a full ECM system, and are subject to all of the business rules which a truly serious content repository requires. Thus, for example, commercial-in-confidence e-mails may be restricted to important personnel, or excluded from the public face of the enterprise content repository through a nuanced system of access control and security caveats. Retention schedules may be applied to files or parts of the document hierarchy as necessary, and placed on litigation hold if necessary. Receipt of e-mails can trigger workflows. Full content, metadata-rich, boolean search queries with hit highlighting can be used to quickly identify relevant e-mails for any given query. Perhaps most importantly, management of your e-mails is done within an environment which complies with leading records management standards like DoD 5015.2 or ISO15489 and stringent regulatory standards like the Sarbanes-Oxley Act.

Within this enterprise content management informed approach to e-mail management, TOWER Software believe that the best way to manage the large volumes of junk, personal, and trivial e-mail is to allow the users of the software to make informed decisions about which e-mails should be retained as records. When an e-mail is registered, information is captured from the e-mail's headers, and further user-defined information may be added in the e-mail registration sheet. This allows for the rich, contextualised cataloging of e-mail. It also allows for the e-mail to be dealt with in the context of well-defined business processes, and managed through its life-cycle in accordance with business rules. For example, human-based cataloging of messages allows the archiving of the e-mail in a file with appropriate access controls and retention schedules. This level of discretion and granularity in selection of important e-mails simply cannot be offered by automated cataloging systems. In short, TRIM Context extracts all relevant metadata from e-mails, and combines the information entered by the user to produce a document in the ECM system which is as usable as any other document in that repository.

### **The e-mail management interface in TRIM Context**

TOWER has provided intuitive, easy to use interfaces for e-mail management in TRIM Context 6. Integrations are provided with Microsoft Outlook, Novell Groupwise, and Lotus Notes. The Microsoft Outlook integration provides a number of features which help to minimise training required for users, and which encourage them to catalog their e-mail by providing an intuitive interface. Users have a number of options for cataloging e-mails. Individual e-mails may be cataloged by selecting the e-mail and pressing the "Catalog" button in the toolbar. This will present a standard record registration dialog, allowing access to the organisation's file hierarchy and thesaurus, and allowing for the entry of record metadata. Alternatively, users may link mail folders to files in the ECM system, allowing for the cataloging of e-mails by a simply drag-and-drop onto the linked folder, bringing up a record registration dialog (which can even be turned off for full automation). Linked folder functionality can also be used to automatically process all e-mails in the user's inbox, and all e-mails sent by them, if the organisation so desires. In order to promote user buy-in, TRIM Context's mail integration also adds the ability to search the entire content repository for documents, and to send attachments directly to offline access for further access or work within the ECM system. TRIM Context thus provides simple but powerful tools for search and registration of e-mails, enabling the integration of e-mails seamlessly into the ECM system.

### **Conclusion**

TOWER Software has adopted a pragmatic approach to e-mail management in TRIM Context 6. E-mail messages are treated as first-class citizens within the enterprise content management system, and benefit from all of TRIM Context's industry-leading capabilities. Integration of e-mail capture tools into familiar interfaces such as Microsoft Outlook with toolbars and drag and drop encourage users to make full use of the e-mail cataloging system with minimal training and resistance to change. The application of business rules and ECM capabilities such as robust search and retention scheduling demonstrate how TRIM Context's e-mail management helps your organisation do business better.