

Solution Highlights

For End Users

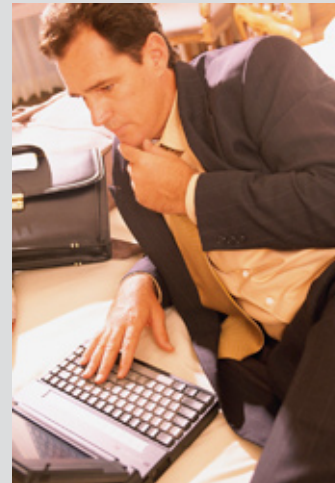
- Automate the capture, classification and storage of personal e-mail to adhere to organizational policies
- No training required as Livelink ECM – eDOCS E-mail Management handles all tasks associated with message tracking

For Administrators

- Administrators can implement extensive security features that defend against unauthorized access at folder, document, group, user, and file plan levels
- Specify rules for e-mail retention policies that significantly reduce IT system and software infrastructure costs as only one copy of messages needs to be maintained in the enterprise content repository
- Maintain a centralized process for the preservation of vital e-mail records to reduce costs associated with discovery

For Organizations

- Simplify adherence to regulatory mandates — Sarbanes-Oxley Act extends to all audit documents, including e-mail to be maintained for 5 years, FDA 21 CFR part 11, HIPAA, PIPEDA and other privacy related legislation extends to e-mail communication, SEC 17-a/17-b and NASD 3010/3110 govern e-mail retention policies
- Rapidly deploy a true enterprise-wide platform for policy enforcement to achieve compliance and enhance content relevancy and categorization for knowledge management initiatives



“A document management system or records management system is an investment that enterprises should leverage to implement policy-driven e-mail preservation.”

— Gartner, Inc.

Livelink ECM – eDOCS™ for E-Mail Management



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Streamlining E-Mail Management Processes within a Familiar Working Environment

The Business Challenge

E-Mail is the most critical communication channel for most organizations and government agencies, but e-mail messages are not widely considered business records. It is estimated that nearly 35% of mission critical business content is stored in e-mail repositories, but fewer than 10% of all enterprises have policies and systems in place for e-mail retention.

Industry regulators are increasingly mandating that certain e-mail messages be retained for 3 or more years for auditing and compliance purposes. Regulations such as the USA Patriot Act, HIPAA and the government Freedom of Information Act (FOIA) mandate that organizations develop, communicate and enforce e-mail management, retention and disposition policies. Failure to comply could potentially expose businesses and government to civil and criminal liability.

As e-mail communications continue to proliferate, organizations are challenged to deploy enterprise-wide platforms for policy enforcement for compliance and relevancy categorization for knowledge management. There are a number of IT challenges associated with the management of e-mail. First, the management of e-mail as part of the enterprise content repository. Second, policy considerations associated with the process of organizing and classifying e-mail, in accordance with company and legislative requirements. Third, enforcement of privacy issues associated with e-mail. Fourth, maintaining balance between centralized retention and disposition policy and end user responsibility to comply with such policies, particularly as they relate to managing in-boxes.

Livelink ECM – eDOCS E-Mail Management

Livelink ECM – eDOCS captures, manages, preserves and leverages corporate e-mail as a mission critical asset. Livelink ECM – eDOCS is integrated with all the major e-mail systems such as Microsoft® Outlook®, Novell GroupWise® and Lotus Notes™.

Most regulations stipulate documenting all steps associated with mandated compliance. When stored as a record in the Livelink ECM – eDOCS repository, e-mail content may be associated with other documents, messages and attachments can be indexed and searched, and the e-mail lifecycle can be securely defined by defining business rules relating to its operational value and significance.

E-Mail Management and Auditing in Microsoft Outlook

E-Mail messages are profiled into the Livelink ECM – eDOCS content repository in a non-intrusive manner directly from the Microsoft Outlook client. E-Mail metadata (e.g. sender, recipient, subject and additional custom fields) is automatically inherited and managed as part of a scalable and secure enterprise content repository. Administrators are empowered to define rules by which e-mail messages, threaded discussions and e-mail attachments are to be profiled and related to appropriate folders and other documents within the Livelink ECM – eDOCS content repository.

E-Mail Storage, Protection and Compliance

Livelink ECM – eDOCS offers fully integrated and comprehensive records management capabilities that provide an organized, secure environment to manage the complete lifecycle of all physical and electronic corporate knowledge assets, including e-mail. Managing e-mail as an integral component of an enterprise content repository means that records administrators can more easily and effectively implement a corporate file plan and associated retention and disposition rules associated with e-mail messages.

Administrators can implement extensive security features that defend against unauthorized access at folder, document, group, user, and file plan levels. Specific rules may be defined for e-mail retention policies that significantly reduce IT system and software infrastructure costs as only one copy of the e-mail message needs to be maintained in the enterprise content repository. Having a centralized process for the preservation of vital e-mail records will also reduce costs associated with discovery. Managing the e-mail lifecycle in tandem with enterprise content and records reduces exposure to regulatory scrutiny and civil and criminal penalties. Livelink ECM – eDOCS provides extensions to e-mail archival platforms, supporting integrations with optical disk and content addressable storage devices and platform.

Automated E-Mail Classification

Livelink ECM – eDOCS provides an advanced, automated means to capture, process, and classify e-mail to more effectively manage volumes of messages and attachments. Using a rules-driven graphical wizard, similar to Microsoft Outlook, administrators can define and automate the process of classifying both in-bound and out-bound e-mail messages and their attachments into pre-defined folders or subfolders. The automated rules capture message metadata, content and attachments through the definition of variables and “regular expressions.” Messages matching rule criteria are then stored in pre-defined folders configured to meet corporate retention and disposition rules.

The Livelink ECM – eDOCS automated e-mail classification based on pre-determined rules does not require additional overhead as it is fully integrated with Microsoft Exchange® and deployed on the same server. This integration enables Livelink ECM – eDOCS to leverage and preserve pre-existing IT infrastructure investments and provide a highly scalable and secure enterprise content repository.

Livelink ECM – eDOCS E-Mail Management
Seamless integration with standard e-mail authoring tools (Lotus Notes, Microsoft Outlook, and Novell GroupWise) for message capture
Automatic inheritance of e-mail metadata into Livelink ECM – eDOCS profile form
E-mail stored alongside other relevant enterprise content
Extended search capabilities and duplicate checking
Message thread tracking
E-mail can be stored in read only state to comply with corporate records
Automated rules based classification of e-mail messages and attachments
Rules are automatically archived to ensure that they are traceable and auditable



Livelink ECM – eDOCS captures, manages, preserves and leverages corporate e-mail as a mission critical asset. Livelink ECM – eDOCS is integrated with all the major e-mail systems such as Microsoft Outlook, Novell GroupWise and Lotus Notes.

