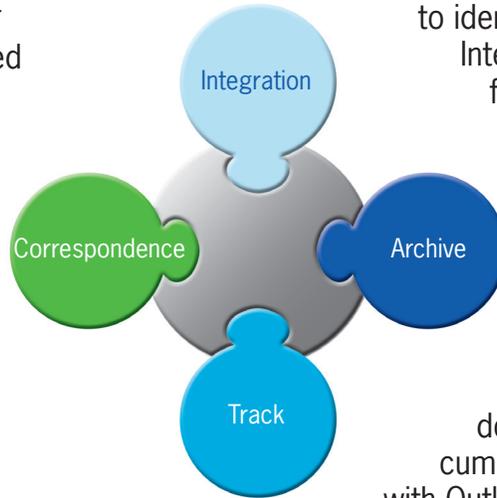# CMA

Challenges with Email and Correspondence

- 90% of all business correspondence is conducted via email

- Critical correspondence should be considered a business record or document

- Correspondence isn't associated with the documents they reference

- Classification, filing, and archiving email with current technologies is unorganized

- Critical email correspondence isn't integrated with existing backend systems

Email Manager from CMA

Integrate. Track. Archive. To effectively solve these challenges, we need a solution for the knowledge workers; the end user. Your employees understand the context of each email and have the ability to identify critical business records. Integration with back office systems for classification and thread tracking make it simple for users to provide context to email correspondence which should be captured into an existing document management system. From within the Outlook interface, a message thread can be tagged once and tracked automatically without making the documentation process timely and cumbersome. This seamless integration with Outlook and your document management platform combines for Integrated Content Management.
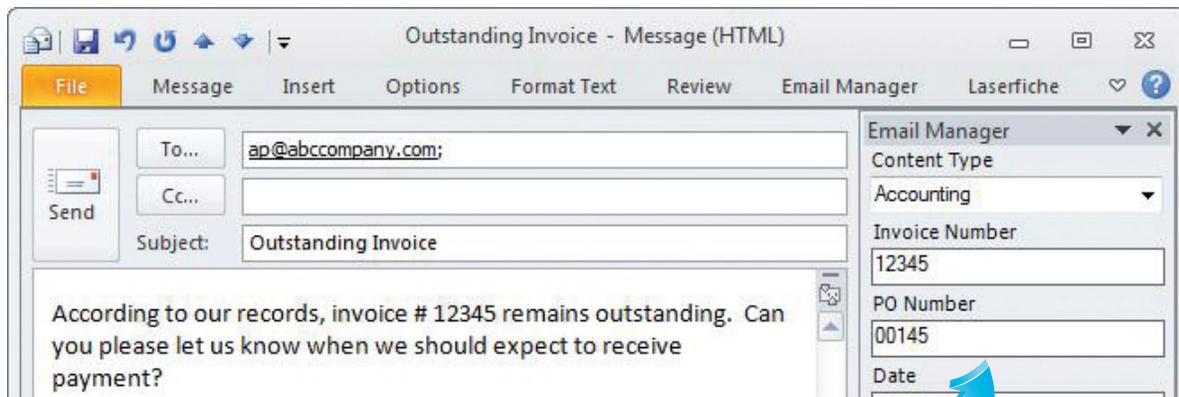
Email Manager's Outlook Plug-in

Over 60% of organizations surveyed have little or no confidence that commitments and obligations made by their staff are recorded, complete, and retrievable. Email should be secure, instantly accessible, and integrated with your line of business applications, such as document management, accounting, project management, human resources, and CRM systems. Today, we are limited to ad hoc filing with folders (drag and drop) or forced to implement catch all solutions (Exchange Archiving), neither of which provide context to the correspondence or integration with existing systems and business workflows.

Administration & Deployment

Email Manager is easy to configure and deploy. There is no need to manage outlook add-ins for each desktop. Simply select fields from your existing document management repositories, adding lookups or drop downs for data validation. Lookups allow you to connect to existing data sources with type ahead query and formatting. The Outlook plug-in package is created by selecting one or more index fields from the Email Manager admin console and then choosing which users to deploy the integration. The next time those users login to Outlook and connect to the Exchange server, a message box appears and Email Manager installs on the desktop. Changes, edits and new applications for archiving are automatically configured and deployed from the admin console, updating the plug-in on the desktop the next time a user connects to Exchange.

The Outlook Experience

Inbound and outbound messages are tagged **ONCE** using the Email Manager Outlook plug-in. Index values are pre-filled using the type ahead look-up and drop down features. Now all subsequent messages for the thread are automatically archived along with any attachments. Additional system information, such as date, time, to, from, subject, cc, and username information is also collected from each message when it is uploaded into the document management repository.

Tracking

Once a user has tagged an email message with project #, employee #, document type, or other appropriate field (as defined in your document management software), Email Manager tracks the entire thread. All previous and subsequent messages sent and received will automatically be populated with the applied tags. When someone from outside your company's network takes part in the conversation, Email Manager works to keep the thread tagged as intended. If users determine that a particular message should not be archived, they can select to go off the record at any time. If they want to go back on the record, they can select the archive option to begin recording the correspondence again.

Integrated Archiving

As an email message and subsequent thread is tagged through the Outlook interface, Email Manager stores index information locally. Periodically, an upload process runs silently in the background, calling the Email Manager web services application. Files are then uploaded in the background silently. If a user is offline, the upload service will simply upload the messages when the user is back online.

Applications

- HR
- Customer Service
- Legal
- Accounts Receivable
- Accounts Payable
- Purchasing
- Project Management