

# Mail Communications in TRIM Context 6

**Date: August 2005**

**Author : Stephen Still**

TRIM Context 6 will provide new functionality to manage and document the full range of communications that a modern organisation deals with on a day to day basis. Our vision with these new tools is to provide a centralised clearing house for corporate communications, to help organisations maintain accurate corporate memory of its relationships with clients, partners, and regulators within the industry-leading enterprise content management capabilities of TRIM Context 6. Support will be provided for tracking communications related to diverse media types, including e-mail, traditional mail, courier, facsimile and up to four user-defined communications types. This whitepaper will discuss the difficulties of central communications management, and then discuss the ways in which TRIM Context 6 solves this problem through its use of rich metadata, redundant metadata for communications, and its enterprise-class search abilities.

## **The communications challenge**

Communication-enabling technologies have blossomed over the last decade, and have produced an enormous increase in the number of recordable communications which an organisation produces. Parallel to this very positive development, however, has come the vexing issue of how an organisation can actually keep track of when, how, and with whom an organisation has communicated. The easiest solution — simply ignoring this communication metadata — is clearly unsatisfactory. Not only does this have potentially serious legal and regulatory implications for some industries, but it also makes it substantially more difficult for the organisation to keep effective track of its own relationships with customers, partners and other correspondents. Corporate memory of communications is irretrievably lost when an employee leaves, wasting valuable time in the task of reconstructing relationships between the new employee and the clients she looks after.

Ignoring corporate communications can therefore hamper an organisation's ability to cope with personnel change. But the ability of organisations to centrally manage communications within records-management systems has been hampered by a lack of sophistication in the way these systems generally deal with communications metadata. For example, a simple reliance on a Locations table to supply the details of addressee and sender is incapable of dealing with variations in a person's address, and of tracking the history of that person's address changes. Again, the linking of multiple communications with a particular document, such as a form letter, is virtually impossible where a 1 to 1 relationship is assumed between the communication and the document — that is, without duplicating the record itself. This is obviously impractical, inefficient, and calculated to destroy the usability of records hierarchies where records are commonly reused for multiple communications. TRIM Context 6 sets out to solve these problems with its new Communications Management tools.



## **Capturing communications**

TRIM Context 6 will provide the infrastructure and the records entry systems necessary for successful capture of communications information. In order to store relevant information about communications, TRIM Context 6 will introduce the redundant capture of addressee and sender location information, separate to location fields. This will allow an accurate historical understanding of the provenance of particular communications. TRIM Context 6 will also introduce a metadata field for the unique mail ID. This is intended for entry of data such as the unique serial number often assigned to packages by courier firms. Finally, TRIM Context 6 decouples the concept of a communication from a 1 to 1 relationship to a document,<sup>1</sup> allows for an arbitrary number of communications to be associated with any one document. This makes the logging of communication information for commonly used documents such as brochures and forms substantially more feasible.

TRIM Context 6 will also improve metadata fields relevant to the addressing and construction of communications. Most notably, TRIM Context 6 introduces support for a “salutation” field, into which users can enter customised salutations such as “President”, “Fearless leader” etc. These come in particularly handy when designing document assembly templates which are customised to fit the position of the person addressed, and in printing address labels. TRIM Context 6 will also for the first time support entering of gender information, providing the unknown, male, female, and unspecified options. In order to encourage users to go through the process of entering communications details, TRIM Context 6 will also introduce an intuitive interface for the entry of this data. The registration form for new records now includes a “Communications” tab, in which the details of addressee and sender can be added at the time of registration, and from which mailing labels may be printed. For existing records, a right-click will bring up a list of existing communications associated with the record, to which a user can add by right-clicking and selecting “New Communication”. E-mails sent from within TRIM Context 6 are automatically entered as communications. Users should find these simple interfaces intuitive and in line with their expectations from elsewhere in the TRIM Context 6 interface.

## **Searching for communications**

As users of previous versions of TRIM Context 6 will expect, TRIM Context 6 provides very strong search capabilities, and these extend to the new mail communications capabilities. There are a number of communications-specific searches which are available to users of TRIM Context 6. General searches on communications may be conducted for all communications ever sent, for all communications associated with a particular record, for communications associated with a particular location, and for all searches within a stipulated time range. More specific searches, based on the actual details of the communication, can also be conducted on all of the metadata associated with the communication, including the sender, recipient, address, date and medium.

## **Communications Reports**

TRIM Context 6 has always provided powerful tools for generating reports from records within the system. In line with these expectations, TRIM Context 6 provides a standard report type for the creation of communication reports.

---

<sup>1</sup> i.e. one document = one communication; one communication = one document.

This allows the printing of reports on communication details for a selection of communications as well as the creation of address labels. A sample address label report is available for import from the report samples shipped with TRIM Context 6. The address label will print a separate label for each recipient of the tagged communications. This allows a user to run a search for communications, and tag the ones that require recipient address labels. The record number can be printed on the address labels for the easy matching of labels to letters.

## **Standards compliance**

TRIM Context 6's new mail communications functionality has been specifically designed to conform to the Dutch standard NEN 1888 (General personal data — Definitions, character sets and interchange formats) and NEN 5825 (Addresses — Definitions, character sets, interchange formats and physical presentation). As a superset of the normal requirements of English speaking addressing and communications requirements, this guarantees superlative quality in the implementation of TRIM Context 6's mail communications features.

## **Conclusion**

TRIM Context 6 provides a centralised and sophisticated method for managing and documenting all of an organisation incoming and outgoing messages. By providing support for diverse media such as facsimile, e-mail, and traditional post it ensures that a truly comprehensive record of communications can be made, and presented in the context of ongoing processes of communication. The authenticity and reliability of the record is guaranteed by the redundant capture of sender and addressee metadata, and the ability to associate multiple communications with a single record. Organisations should find that TRIM Context 6 can now act as a central register for all communications in addition to its other powerful functionality.

## **About TOWER Software**

TOWER Software delivers Electronic Document and Records Management (EDRM) Solutions, empowering organisations to take control of their corporate information assets. TOWER Software's award-winning TRIM Context® solution is a single, integrated platform that manages business information throughout its complete lifecycle. By relying on its proven domain expertise, strong strategic partnerships, and powerful solutions, TOWER Software enables organisations to maintain accuracy, maximize efficiency, and achieve and maintain standards compliance across industries, resulting in sustained competitive advantage. TOWER Software is a privately held company with operations in North America, Europe and Asia-Pacific. For more information, visit [www.towersoft.com](http://www.towersoft.com).



### **TOWER Software Asia Pacific**

[www.towersoft.com/ap](http://www.towersoft.com/ap)

### **TOWER Software North America**

[www.towersoft.com/na](http://www.towersoft.com/na)

### **TOWER Software Europe, Middle East & Africa**

[www.towersoft.com/emea](http://www.towersoft.com/emea)

TRIM Context is a registered trademark of TOWER Software. All rights reserved.

Copyright © 2005 TOWER Software