# Email's role in Records and Information Management (RIM) compliance

As you're undoubtedly already aware, email is a huge source of information and records for businesses. This information is the lifeblood of project and client work. To be completely Records and Information Management (RIM) compliant, you need to ensure that you're using the right software to control your recordkeeping appropriately.

Unfortunately, Microsoft doesn't give users an easy solution for transferring email messages into SharePoint from Outlook. Luckily for you, several solutions allow you to work on SharePoint without leaving Outlook, making it easy to search for emails and information and find documents in SharePoint from within the Outlook interface. So, we recommend that you use an alternative solution like Mail Manager!

At Mail Manager, we are firm believers in supporting businesses in their information governance journey, and without RIM compliance, there cannot be information governance.

**How can you benefit from RIM Compliance?**

By putting RIM compliance at the forefront of your overarching information governance strategy, businesses receive benefits including:

• **Minimised risk of disputes:** a common cause of legal disputes is poor recordkeeping and information mismanagement. Missing information is one of the leading causes of disputes in the AEC industry and costs companies [$62 million](#) every year.

• **Lower legal costs:** when you're able to find the emails you need when you need them, you're far less likely to need to hire external professionals or lawyers to help find this information.

• **Spend less on storage:** when your records are organised and concise, businesses can significantly reduce their storage costs as they no longer have masses of duplicated emails.

• **Improved compliance:** by taking ownership of RIM compliance, your business will be able to stay up to date with ISO standards or any other legislative and regulatory requirements for your industry.

• **Find information easily:** proper email and records management means that anyone in a business related to a project or client can find the correspondence or information they need when they need it. At Mail Manager, we pride ourselves that our customers can find any email within three clicks.

**Where does RIM compliance fit into email management?**

There are four minimum requirements for email recordkeeping in RIM compliance: qualification, declaration, classification and reduction.

**1. Qualification:** All inbound and outbound business-critical emails related to a project or client should be identified as records. Personal emails that do not have any business value should be separated.

**2. Declaration:** Any email that gets qualified as a record should be declared (managed). This means that it should be classified against the retention schedule, should you have industry regulations stipulating data retention, or be locked to prevent editing or deletion by other users.

**3. Classification:** The number of emails that have been declared needs to exceed a minimum threshold required for legal defensibility should a dispute arise in the future.

**4. Reduction:** Any unnecessary, duplicated or outdated emails should be deleted.

## How can you tell which emails are records?

Particularly for project and client businesses like accounting, environmental services, and AEC firms, emails and their information (including attachments) are usually important records. Following most definitions, any email would be considered a record if it was created, received and maintained as evidence or information by a business, as defence in a legal matter or a business transaction.

So essentially, any information that is vital to a project, like a scope change in construction or drawing updates in engineering, is a business record. For businesses like legal services firms, the percentage of emails that should be managed as records would be much higher than those for other industries like education.

For RIM compliance, businesses typically have policies in place to help staff determine which emails are business-critical records. But there are some risks with this. First, staff don't always know where these policies lie, and it takes time and effort to determine if emails are important records manually. Second, the definition of a record can be subjective and open to misinterpretation.

It can be challenging to determine which emails are records. So, businesses are beginning to realise that it is more valuable to have an email and document management system in place that quickly automatically files any valuable project or client email. That way, you can guarantee that any correspondence is stored securely, no matter how insignificant it may seem. In our case, we've seen clients win legal proceedings because they were able to find an email that only contained one word, 'yes'.

By using intelligent email filing into SharePoint to your advantage, businesses can ensure they stay RIM compliant and protect themselves from key email mismanagement risks we see every day. Once your emails are saved into SharePoint, you can assign them an official retention period based on your industry or business' retention requirements.

## How can Mail Manager help?

Using a powerful email management solution like Mail Manager, declaring emails as records and ensuring they are stored safely has never been easier. And the best part is you don't even need to leave Outlook!

Once Mail Manager is installed on your device, and depending on your organisation's settings, any time you open or send an email, you will be prompted to file an email to the appropriate SharePoint folder location. Mail Manager's AI suggests the most suitable location to file into, and our industry-leading machine learning technology means that the more you use Mail Manager, the smarter it gets. The email message and any attachments included are then stored in SharePoint.

Mail Manager follows your company's privileged access structure, which means that any confidential emails stay confidential. You can get peace of mind knowing that everything is accessible should you ever need to look back on a project, case or client work down the line. The [benefits of using Mail Manager are felt throughout the business.](#) Users gain productivity as they're no longer wasting time on email admin, companies gain visibility and achieve compliance with QA processes, and systems reduce the need for inbox storage space.
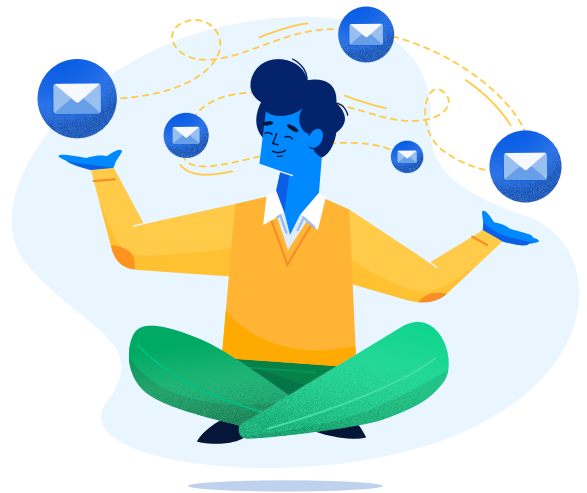
Mail Manager integrates seamlessly into Microsoft Outlook and SharePoint, meaning users can store and search for emails and attachments into SharePoint directly from Outlook on their desktop or using the Mail Manager 365 Mobile app on their smartphone. All of this means that you can transform your project and client work by taking SharePoint to the next level!

**Reap the benefits from RIM compliance**

In summary, there are four key benefits of email management:

1. Increasing productivity by saving employees time and effort in filing and finding emails.

2. Improving project or client management and QA compliance as governance, retention and compliance can be bolstered by using one centralised location for all your important emails.

3. Saving money that would ordinarily be spent on storage costs, inefficient work practices and disputes, should one arise.

4. Reducing risk in years to come by standardising email and records management across your business. With email management, you can ensure complete audit trails and document management.

By incorporating Mail Manager into your overall RIM compliance, everyone wins. For more information on how you can reap the benefits from RIM compliance in your organisation, speak to Mail Manager today, or download a 15-day free trial to see how quickly you can manage your emails better.