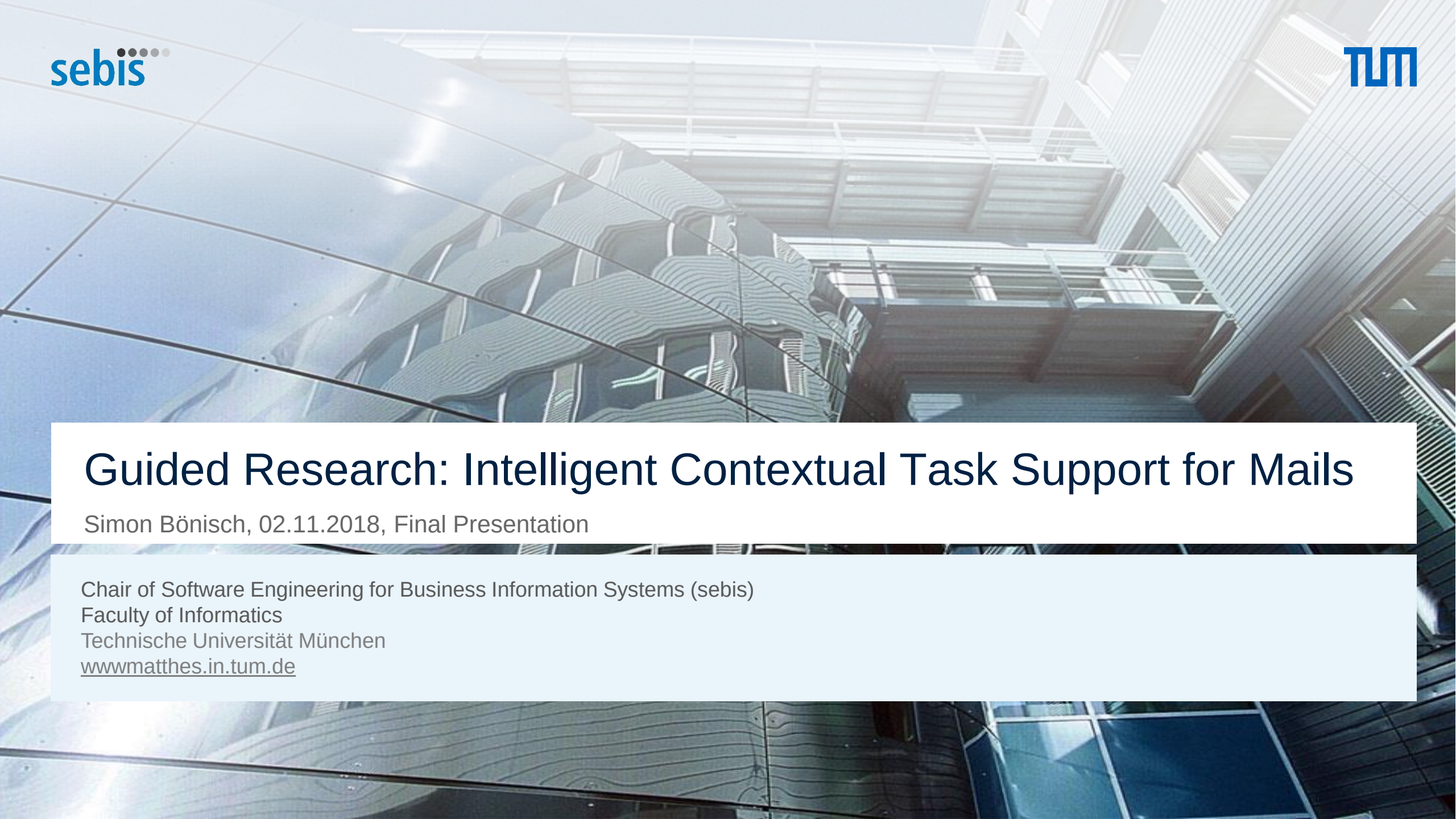

Guided Research: Intelligent Contextual Task Support for Mails

Simon Bönisch, 02.11.2018, Final Presentation

Chair of Software Engineering for Business Information Systems (sebis)
Faculty of Informatics
Technische Universität München
wwwmatthes.in.tum.de

Outline

Identifying and Tracking Tasks in E-Mails

Challenges and Requirements

Tool Comparison

Proposed Solution: Intelligent Contextual Mail

Technical Details

Conclusion

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Identifying Tasks in E-Mails

First Example – Mail

Von John Doe <john.doe@connecare.eu>

Antworten | Weiterleiten | Archivieren | Junk | Löschen | Mehr

Betreff **[STHI] Upcoming Dallas Meeting** 15:01

An Mich

Hi all,

in about 20 days (on 29.10.2018) we'll have the review meeting in Dallas, so let me start to organize the work.

For your convenience, I'm sending again the agenda of the meeting (the same that we'll follow during the rehearsal meeting the day before). Please revise the list of participants and send me any change. You can seek help from Georges Prettjohn if needed. Please consider submitting journey subsidies if you qualify for those.

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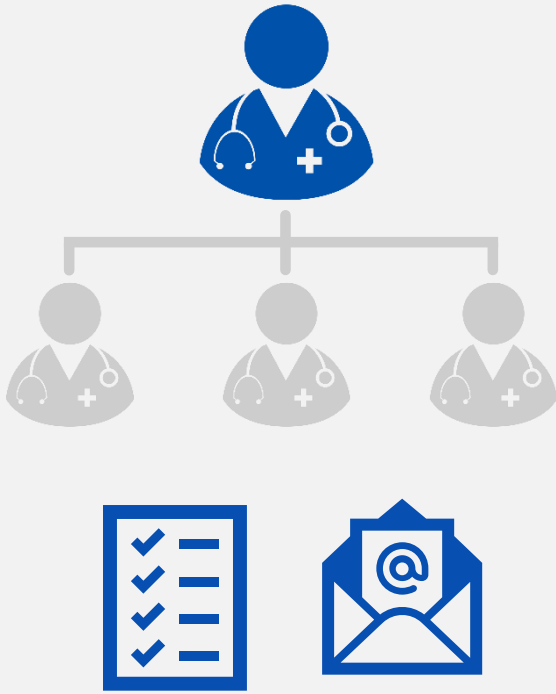
Do not hesitate to contact me in case of doubts or need of more information,
thanks for you cooperation and see you soon!

John

John Doe

Project Coordinator
TUM, Munich
+49 89 123 456 789

Context



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Identifying Tasks in E-Mails

First Example – Tasks highlighted

Von John Doe <john.doe@connecare.eu>
Antworten | Weiterleiten | Archivieren | Junk | Löschen | Mehr
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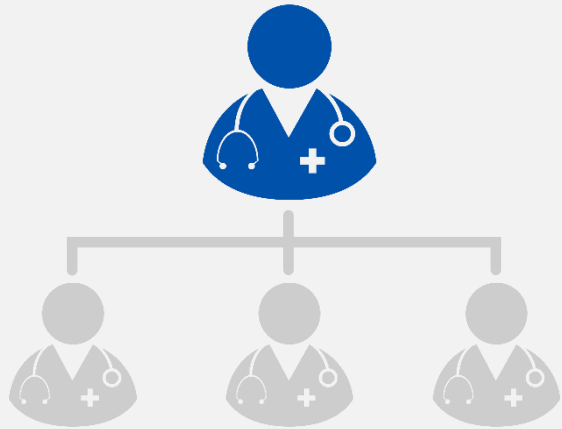

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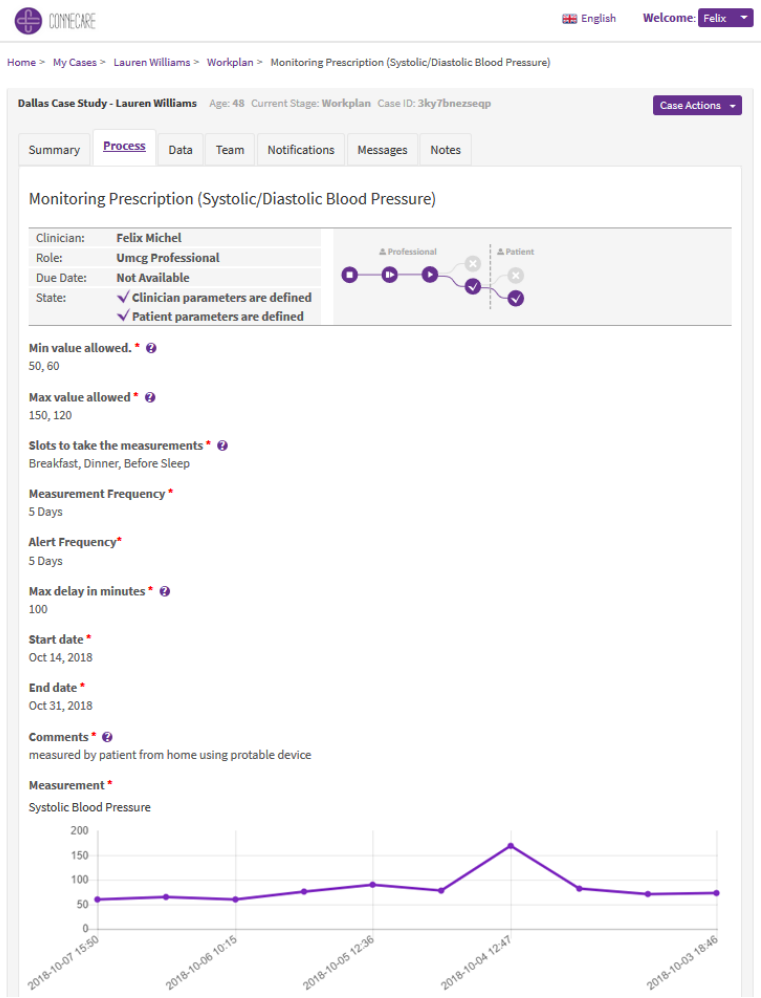
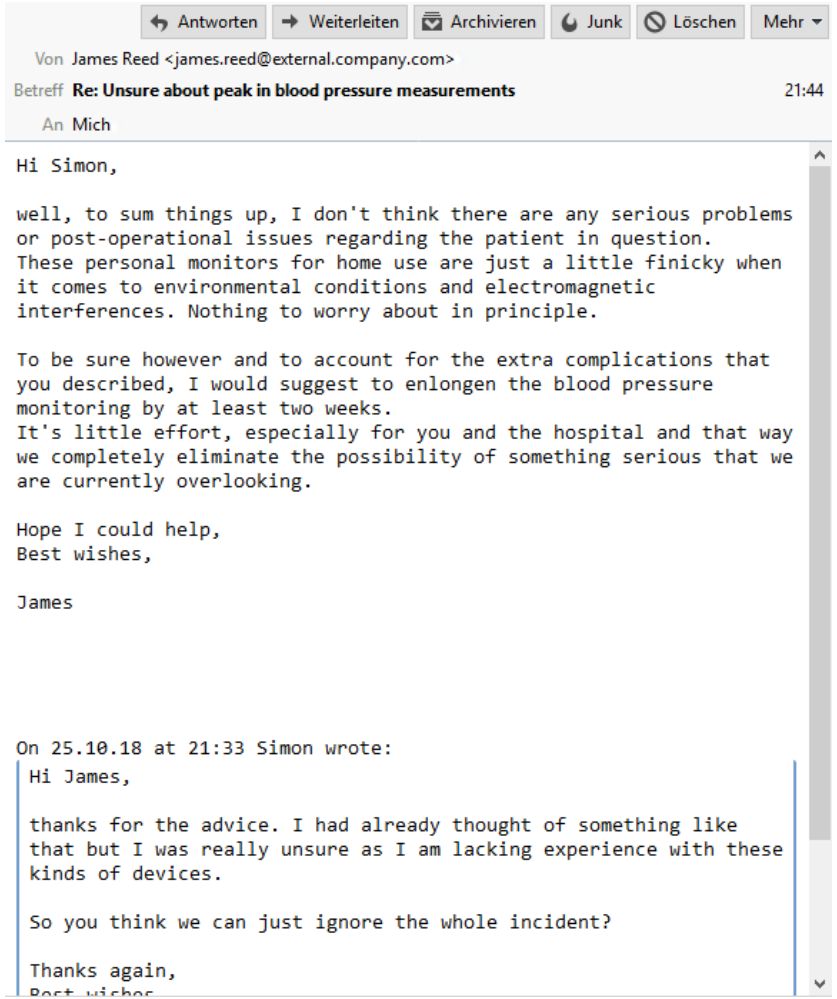
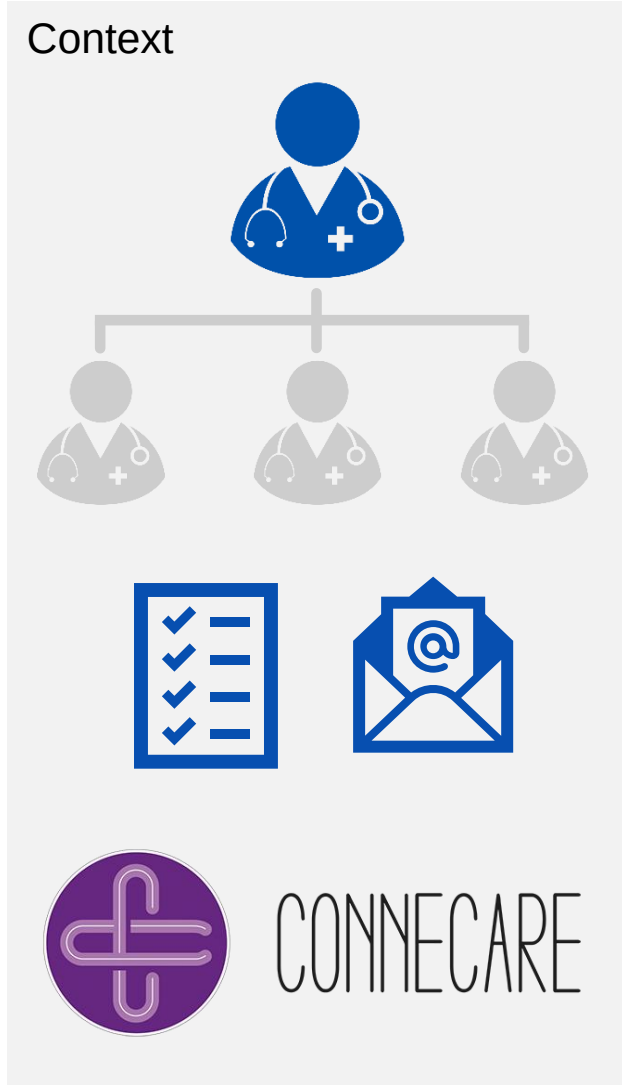
Tracking Tasks in E-Mails

Second Example – E-Mail and Case Details







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Tracking Tasks in E-Mails

Second Example – Case Management Overview

CONNECARE

English Welcome: Felix

Home > My Cases

Search

Case Name	State	Patient	Case Owner	Notifications	Messages	#Tasks
Dallas Case Study	5 minutes ago	Sarah Tylor (29)	Felix Michel			2
Dallas Case Study	3 days ago	Emily Jones (37)	Felix Michel	⚠		0
Dallas Case Study	3 days ago	Michael Johnson (41)	Felix Michel			0
Dallas Case Study	3 days ago	Christopher Wilson (22)	Felix Michel	⚠		0
Dallas Case Study	3 days ago	Lauren Williams (48)	Felix Michel			0
Dallas Case Study	6 days ago	James Davis (24)	Felix Michel	⚠		0
Dallas Case Study	6 days ago	David Brown (61)	Felix Michel			1
Dallas Case Study	6 days ago	William Moore (34)	Felix Michel			1
Dallas Case Study	7 days ago	Joshua Smith (37)	Felix Michel			0
Dallas Case Study	7 days ago	Ashley Brown (42)	Felix Michel			0
Dallas Case Study	10 days ago	Nicole Wilson (56)	Felix Michel		✉	0

?

Context

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Challenges

1. Information is un- or semi-structured

2. Isolated solutions for specific problems

3. Proprietary licenses lead to vendor lock-ins

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Requirements

1. Information is un- or semi-structured

[R1]	**Information extraction**
[R1.1]	Extraction of well-known entities
[R1.2]	Processing of natural language
[R1.3]	Support for user-defined detection patterns
[R1.4]	Annotation of extracted data in initial text

2. Isolated solutions for specific problems

[R2]	**Third party integration**
[R1.1]	Integration of core features of third party system
[R1.2]	Multi-provider support
[R1.3]	Data updates through third party systems
[R1.4]	Task-mail linkage

3. Proprietary licenses lead to vendor lock-ins

[R3]	**Open source license**

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Requirement Support amongst most common Tools

Category	Tool	Information Extraction (R1)				Third Party Integration (R2)				Open Source License (R3)	Reference
		Extraction from structured data	*Processing of natural language*	*Support for user-defined patterns*	*Annotation of extracted data in initial text*	*Integration of external system*	*Multi-provider support*	*Updates through third party system*	*Task-mail linkage*		
Established Mail Clients	Outlook (+Plugins)	○ (●)	○ (○)	○ (●)	○ (○)	○ (●)	○ (●)	○ (●)	◐ (◐)	○ (○)	outlook.live.com/owa
	Thunderbird (+Plugins)	○ (○)	○ (○)	○ (○)	○ (○)	○ (○)	○ (●)	○ (○)	○ (◐)	● (●)	www.thunderbird.net
	Gmail (+Integrations)	● (●)	● (●)	○ (○)	○ (○)	○ (●)	○ (●)	○ (●)	◐ (◐)	○ (○)	mail.google.com/mail
Emergent Mail Clients	Newton	○	○	○	○	◐	●	●	◐	○	newtonhq.com
	hiri	○	○	○	○	○	○	○	●	○	www.hiri.com
	Mailbird	○	○	○	○	●	●	●	○	○	www.getmailbird.com
Enterprise Management Platforms	Zoho One	○	○	○	○	◐	●	◐	○	○	www.zoho.com/mail
	Pega Platform	●	●	●	○	○	○	○	○	○	www.pega.com
	Asana	○	○	○	○	●	●	●	○	○	asana.com
Automation Platforms	Zapier (+Integrations)	● (●)	○ (●)	● (●)	○ (○)	◐ (◐)	● (●)	○ (○)	○ (○)	○ (○)	zapier.com
	Parseur	●	○	●	○	◐	●	○	○	○	parseur.com
	Parserr	●	○	●	○	◐	●	○	○	○	parserr.com
Intelligent Contextual Mail (ICM)		●	●	●	●	●	●	●	●	●	icm.in.tum.de

Legend: ● = completely supported, ◐ = partly supported, ○ = not supported

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Requirement Support amongst most common Tools

Established Mail Clients

- Exist for multiple years
- Widely used around the world
- Advanced e-mail functionality
- Native task management
- Full-fledged plugin system

- **Outlook**
  Business-grade mail client with high spread and high usage

- **Thunderbird**
  Free and open-source mail client with rather classic orientation

- **Gmail**
  Free but proprietary mail client & server targeted at personal use

Requirement	Outlook	Thunder-bird	Gmail
1.1 Extraction from structured data	○(●)	○(○)	●(●)
1.2 Processing of natural language	○(○)	○(○)	●(●)
1.3 Support for user-defined patterns	○(●)	○(○)	○(○)
1.4 Annotation of extracted data in input	○(○)	○(○)	○(○)
2.1 Integration of external system	○(●)	○(○)	○(●)
2.2 Multi-provider support	○(●)	○(●)	○(●)
2.3 Updates through third party system	○(●)	○(○)	○(●)
2.4 Task-mail-linkage	◐(◐)	○(◐)	◐(◐)
3 Open source license	○(○)	●(●)	○(○)

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Requirement Support amongst most common Tools

Emergent Mail Clients

- Released in the last years
- Functional improvements
- Modernized user experience
- Emphasize third party integrations
- Integrations mostly developed in-house

- **Newton**
  Platform independent mail client emulating look and feel of a messenger app

- **hiri**
  Business-oriented mail client with collaboration features for the Microsoft universe

- **Mailbird**
  Highly customizable mail client with highest count of third party integrations

Requirement	Newton	hiri	Mailbird
1.1 Extraction from structured data	○	○	○
1.2 Processing of natural language	○	○	○
1.3 Support for user-defined patterns	○	○	○
1.4 Annotation of extracted data in input	○	○	○
2.1 Integration of external system	◐	○	●
2.2 Multi-provider support	●	○	●
2.3 Updates through third party system	●	○	●
2.4 Task-mail-linkage	◐	●	○
3 Open source license	○	○	○

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Requirement Support amongst most common Tools

Enterprise Management Platforms

- For managing and controlling businesses
- Bundles of multiple specialized modules
- Third party integrations for non-native functionality
- Often serve as central hub

- **Zoho One**
  Suite of ~40 integrated applications with third party integrations for otherwise missing functionality

- **Pega Platform**
  Case Management Platform designed as a base for quickly developing own business applications

- **Asana**
  Single application more focused on managing projects with distributed teams

Requirement	Zoho One	Pega Platform	Asana
1.1 Extraction from structured data	○	●	○
1.2 Processing of natural language	○	●	○
1.3 Support for user-defined patterns	○	●	○
1.4 Annotation of extracted data in input	○	○	○
2.1 Integration of external system	◐	○	●
2.2 Multi-provider support	●	○	●
2.3 Updates through third party system	◐	○	●
2.4 Task-mail-linkage	○	○	○
3 Open source license	○	○	○

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Requirement Support amongst most common Tools

Automation Platforms

- For automation of repeatable processes
- Integrate arbitrary external systems by standardized means
- Backend-Tool, UI only for configuration
- Often triggered by (external) events

- **Zapier**
  Wide-spread automation platform with good integration support and native email parser

- **Parseur**
  Mainly rule-based email parser that features simple UI to enable configuration by non-technical users

- **Parserr**
  Similar to Parseur, but provides advanced rule-based analysis instead of focusing on UI

Requirement	Zapier	Parseur	Parserr
1.1 Extraction from structured data	●(●)	●	●
1.2 Processing of natural language	○(●)	○	○
1.3 Support for user-defined patterns	●(●)	●	●
1.4 Annotation of extracted data in input	○(○)	○	○
2.1 Integration of external system	◐(◐)	◐	◐
2.2 Multi-provider support	●(●)	●	●
2.3 Updates through third party system	○(○)	○	○
2.4 Task-mail-linkage	○(○)	○	○
3 Open source license	○(○)	○	○

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Requirement Support amongst most common Tools

Category	Tool	Information Extraction (R1)				Third Party Integration (R2)				Open Source License (R3)	Reference
		Extraction from structured data	*Processing of natural language*	*Support for user-defined patterns*	*Annotation of extracted data in initial text*	*Integration of external system*	*Multi-provider support*	*Updates through third party system*	*Task-mail linkage*		
Established Mail Clients	Outlook (+Plugins)	○ (●)	○ (○)	○ (●)	○ (○)	○ (●)	○ (●)	○ (●)	◐ (◐)	○ (○)	outlook.live.com/owa
	Thunderbird (+Plugins)	○ (○)	○ (○)	○ (○)	○ (○)	○ (○)	○ (●)	○ (○)	○ (◐)	● (●)	www.thunderbird.net
	Gmail (+Integrations)	● (●)	● (●)	○ (○)	○ (○)	○ (●)	○ (●)	○ (●)	◐ (◐)	○ (○)	mail.google.com/mail
Emergent Mail Clients	Newton	○	○	○	○	◐	●	●	◐	○	newtonhq.com
	hiri	○	○	○	○	○	○	○	●	○	www.hiri.com
	Mailbird	○	○	○	○	●	●	●	○	○	www.getmailbird.com
Enterprise Management Platforms	Zoho One	○	○	○	○	◐	●	◐	○	○	www.zoho.com/mail
	Pega Platform	●	●	●	○	○	○	○	○	○	www.pega.com
	Asana	○	○	○	○	●	●	●	○	○	asana.com
Automation Platforms	Zapier (+Integrations)	● (●)	○ (●)	● (●)	○ (○)	◐ (◐)	● (●)	○ (○)	○ (○)	○ (○)	zapier.com
	Parseur	●	○	●	○	◐	●	○	○	○	parseur.com
	Parserr	●	○	●	○	◐	●	○	○	○	parserr.com
Intelligent Contextual Mail (ICM)		●	●	●	●	●	●	●	●	●	icm.in.tum.de

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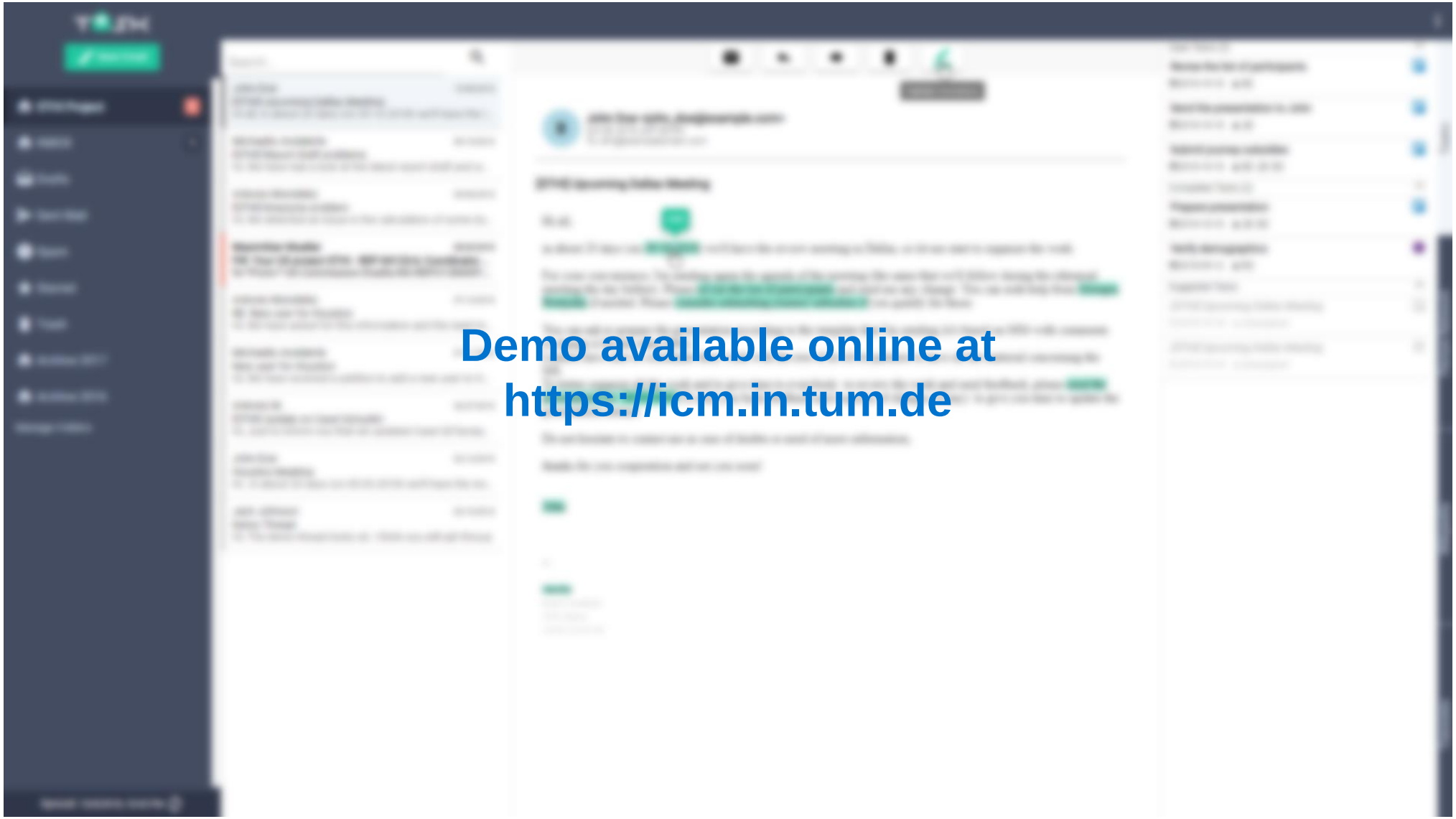
Proposed Solution – Intelligent Contextual Mail



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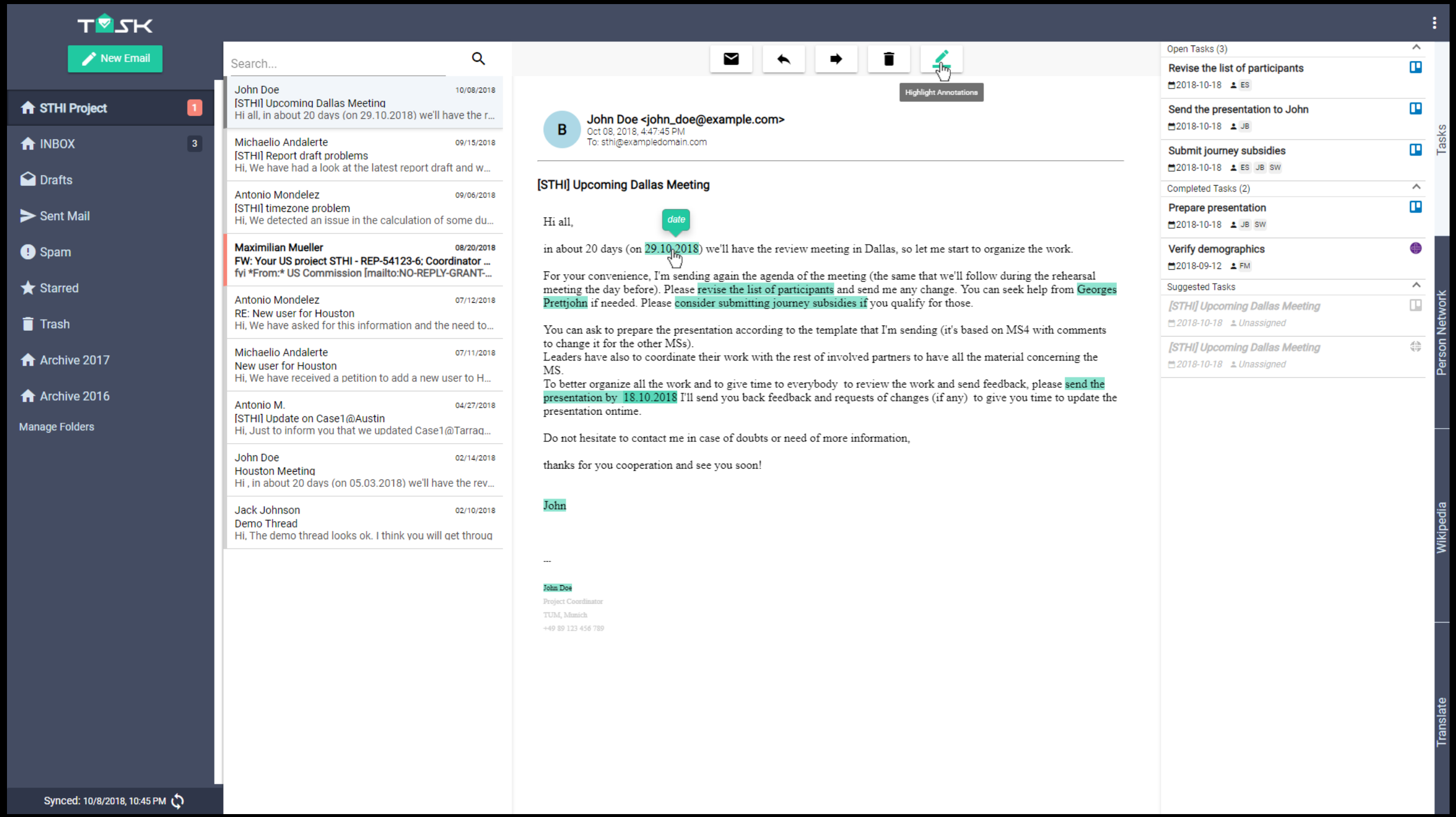
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Sent Mail
Spam
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Houston Meeting
Hi , in about 20 days (on 05.03.2018) we'll have the rev...
Jack Johnson 02/10/2018
Demo Thread
Hi, The demo thread looks ok, I think you will get throug
Highlight Annotations
B
John Doe <john_doe@example.com>
Oct 08, 2018, 4:47:45 PM
To: sthi@exampledomain.com
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Hi all,
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2018-10-18 JB
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2018-10-18 ES JB SW
Completed Tasks (2)
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Person Network
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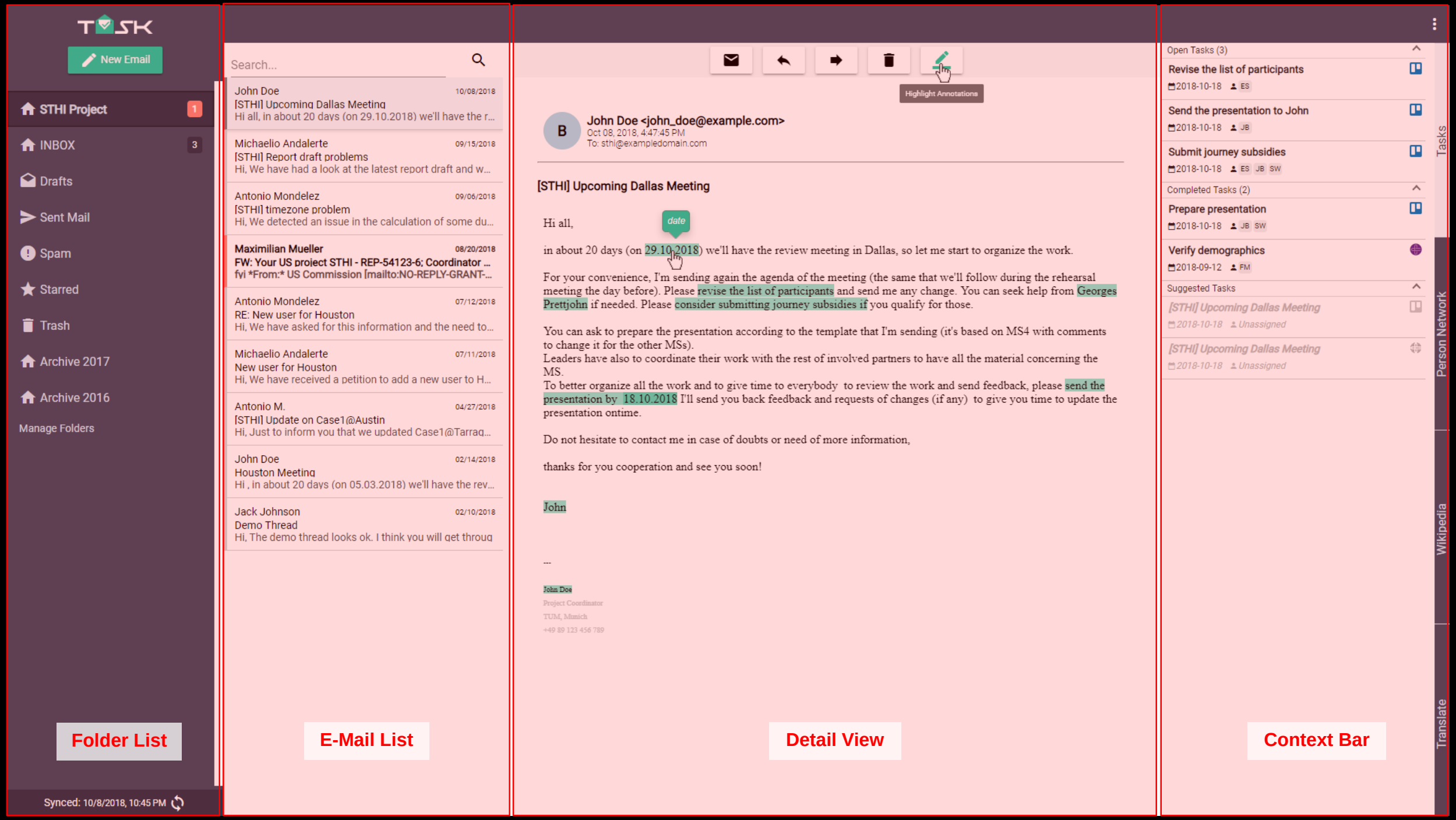
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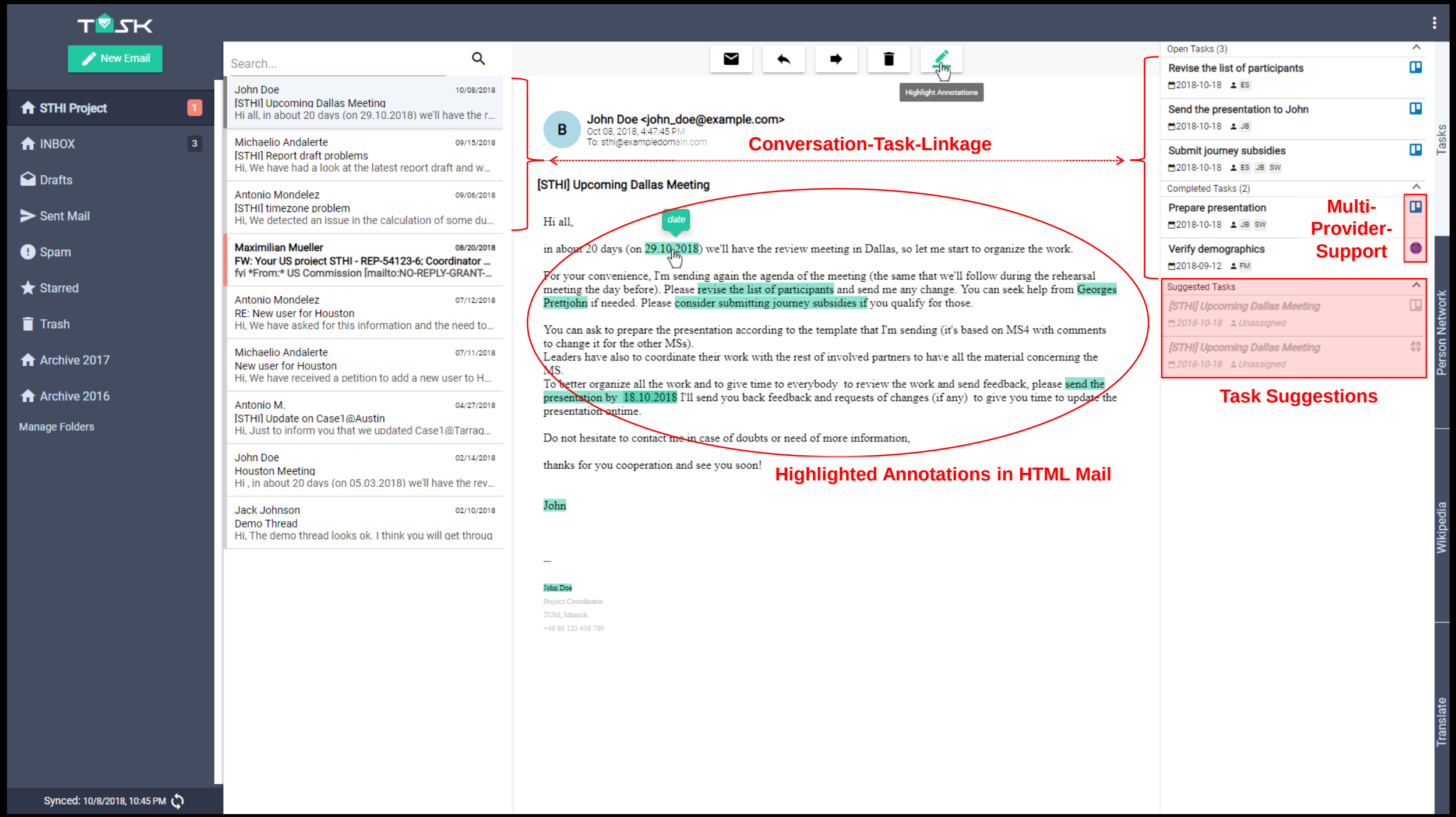
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thanks for you cooperation and see you soon!
Highlighted Annotations in HTML Mail
John

John Doe
Project Coordinator
TUM, Munich
+49 89 123 456 789
Open Tasks (3)
Revise the list of participants
2018-10-18 ES
Send the presentation to John
2018-10-18 JB
Submit journey subsidies
2018-10-18 ES JB SW
Completed Tasks (2)
Prepare presentation
2018-10-18 JB SW
Verify demographics
2018-09-12 FM
Multi-Provider-Support
Suggested Tasks
[STHI] Upcoming Dallas Meeting
2018-10-18 Unassigned
[STHI] Upcoming Dallas Meeting
2018-10-18 Unassigned
Task Suggestions
Tasks
Person Network
Wikipedia
Translate

Monitoring Prescription (Systolic/Diastolic Blood Pressure)

Context

Metadata

Content

Measure type
Systolic/Diastolic Blood Pressure

Min value allowed
50, 60

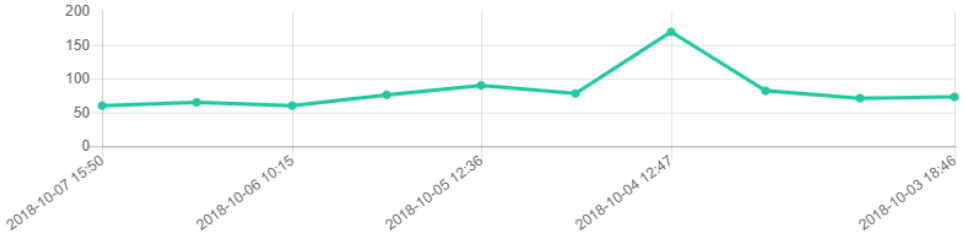
Max value allowed
160, 190

Start date
2018-10-03

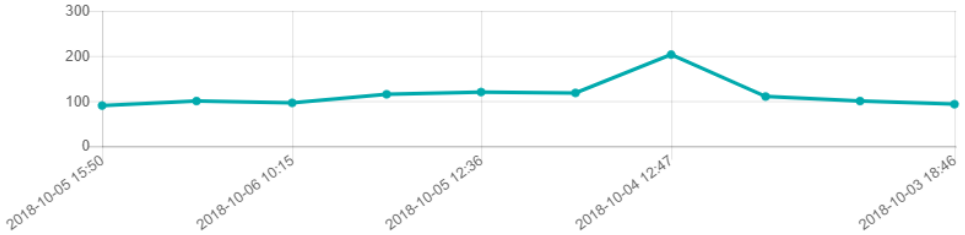
End date
2018-10-14

Slots to take the measurements
Any time a day

Measurement
Blood Pressure Diastolic



Blood Pressure Systolic



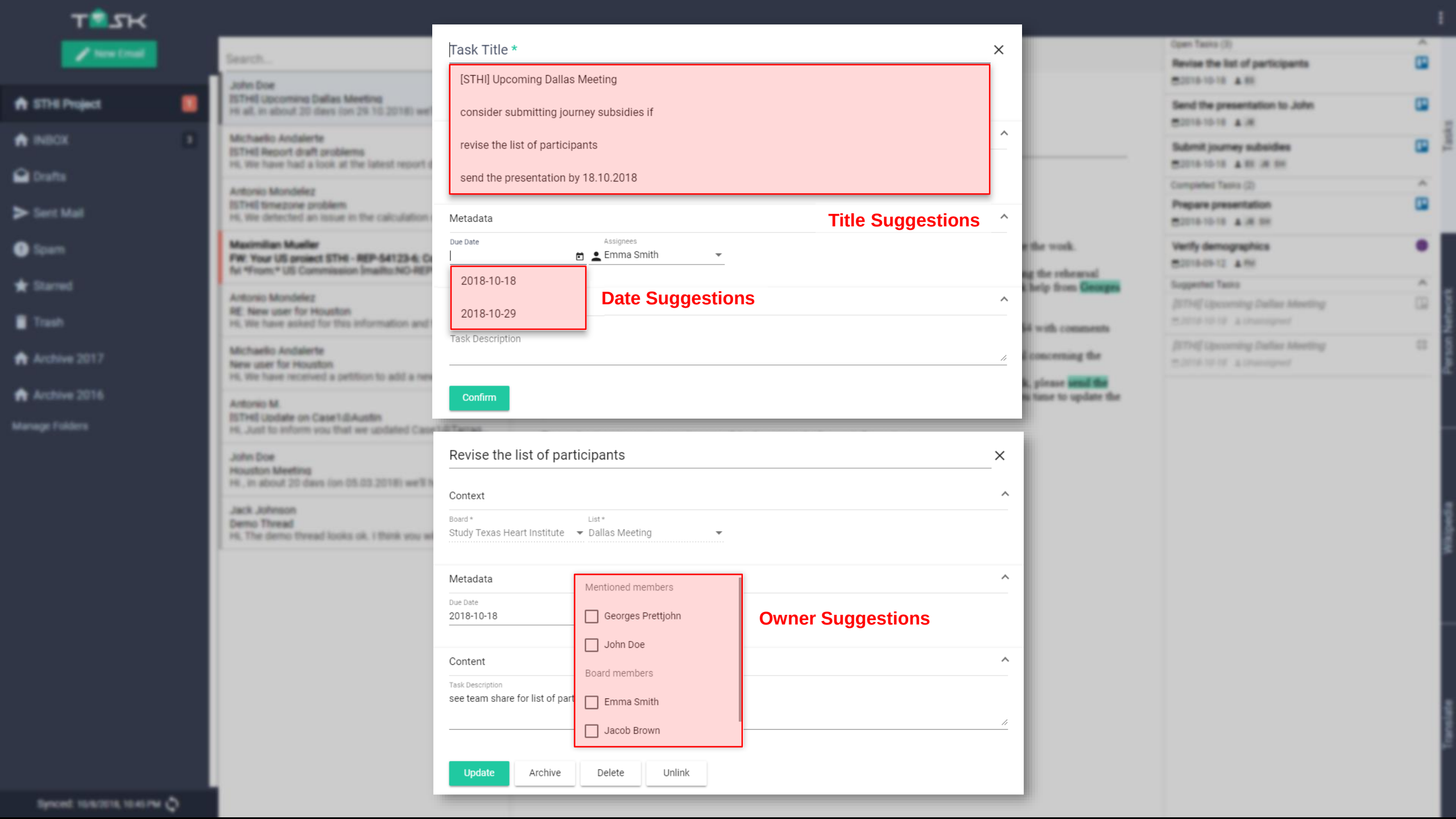
Unlink

Task Title

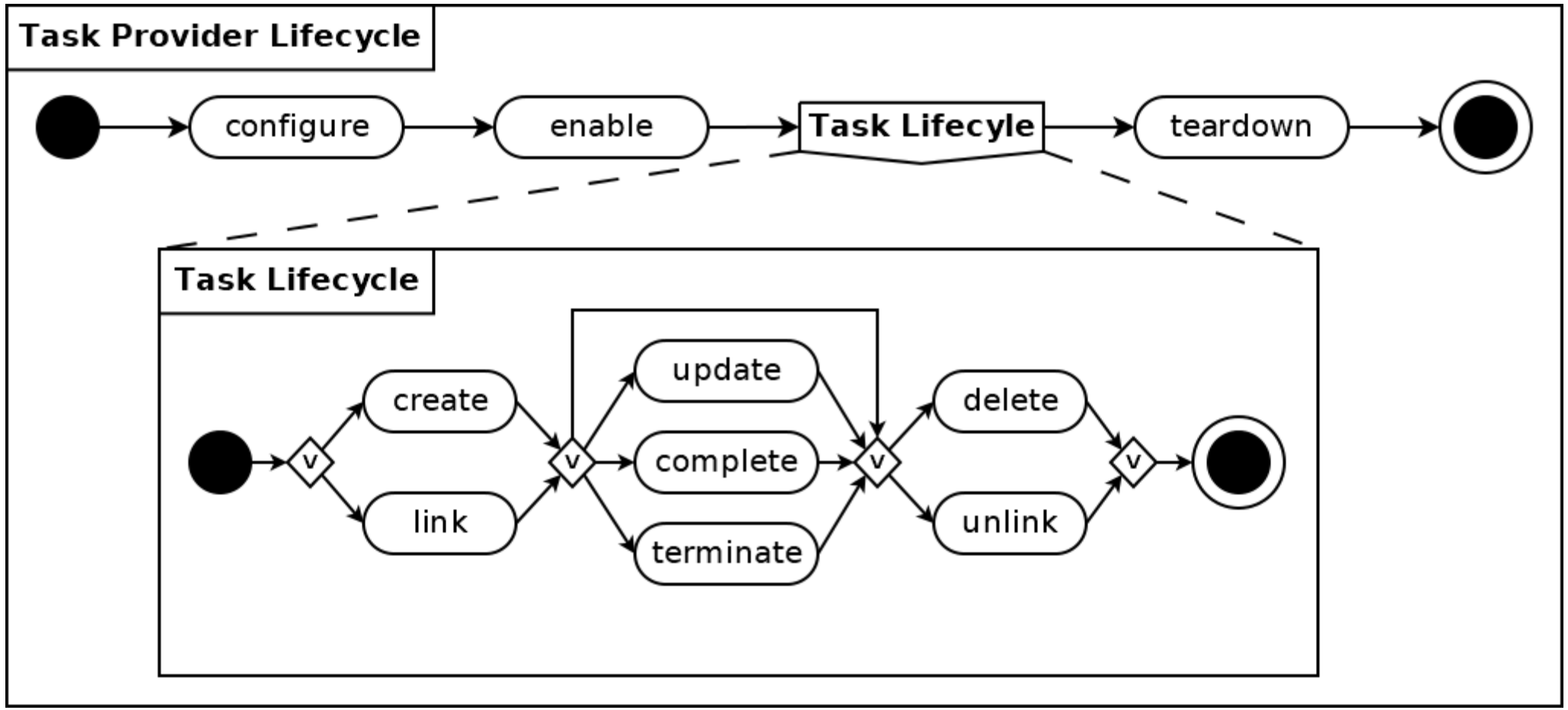
Task Context

Task Metadata

Task Content (provider-specific)


Task Title *
[STHI] Upcoming Dallas Meeting
consider submitting journey subsidies if
revise the list of participants
send the presentation by 18.10.2018
Metadata
Title Suggestions
Due Date
Assignees
Emma Smith
2018-10-18
2018-10-29
Date Suggestions
Task Description
Confirm
Revise the list of participants
Context
Board *
Study Texas Heart Institute
List *
Dallas Meeting
Metadata
Due Date
2018-10-18
Mentioned members
Georges Prettjohn
John Doe
Board members
Emma Smith
Jacob Brown
Owner Suggestions
Content
Task Description
see team share for list of part
Update
Archive
Delete
Unlink

Generic Task and Task Provider Lifecycle



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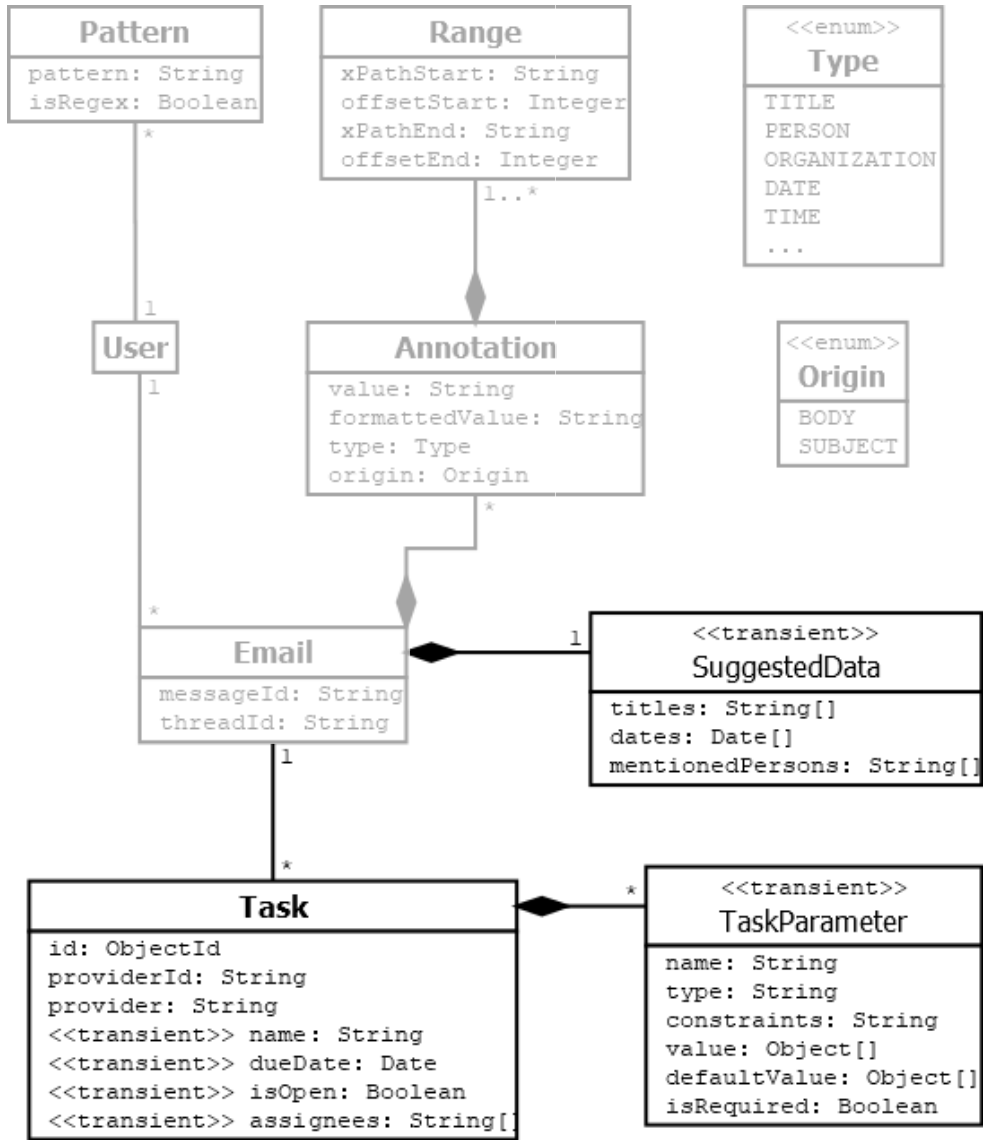
UML Class Diagram



Existing Classes

(Re-)Implemented Classes

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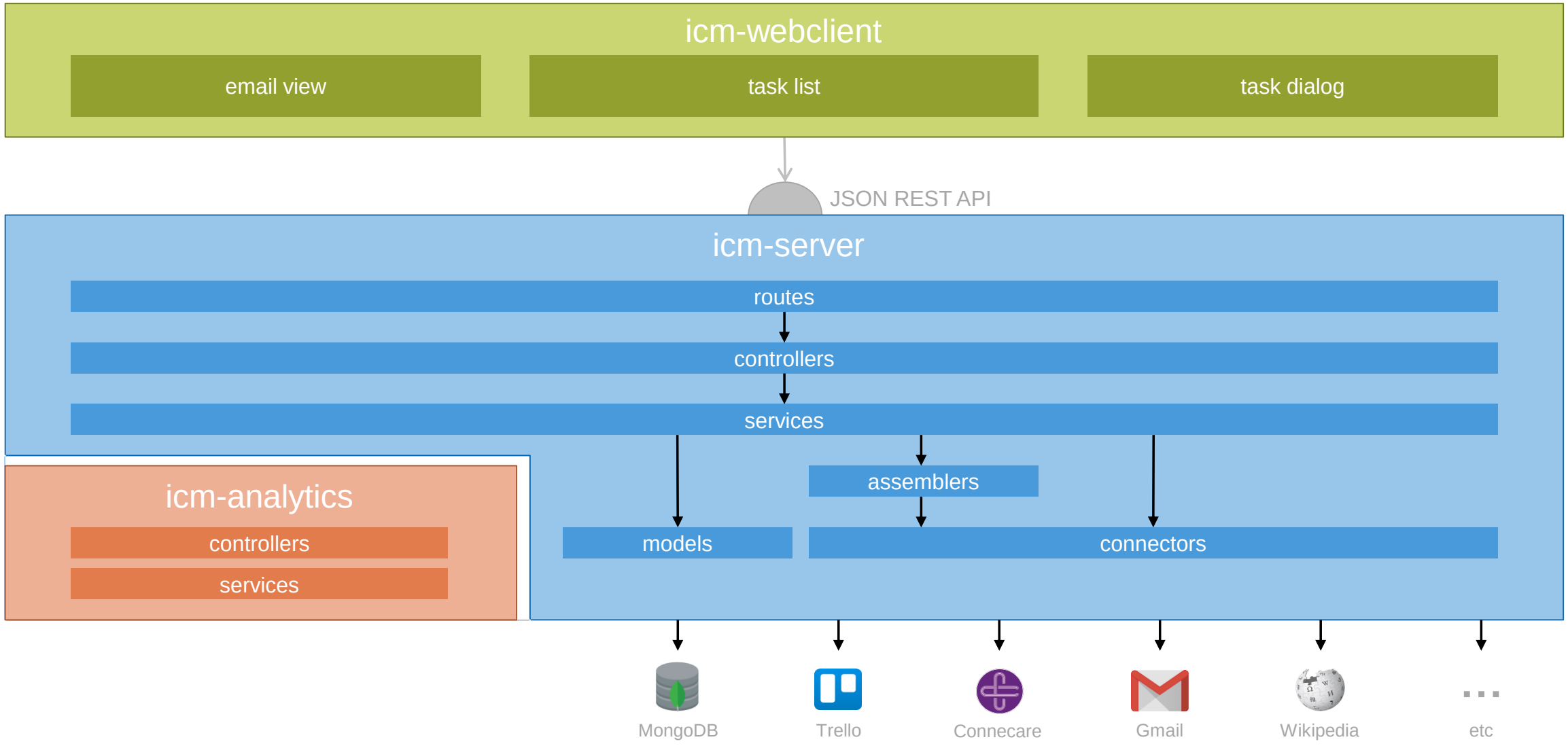
Architecture Overview



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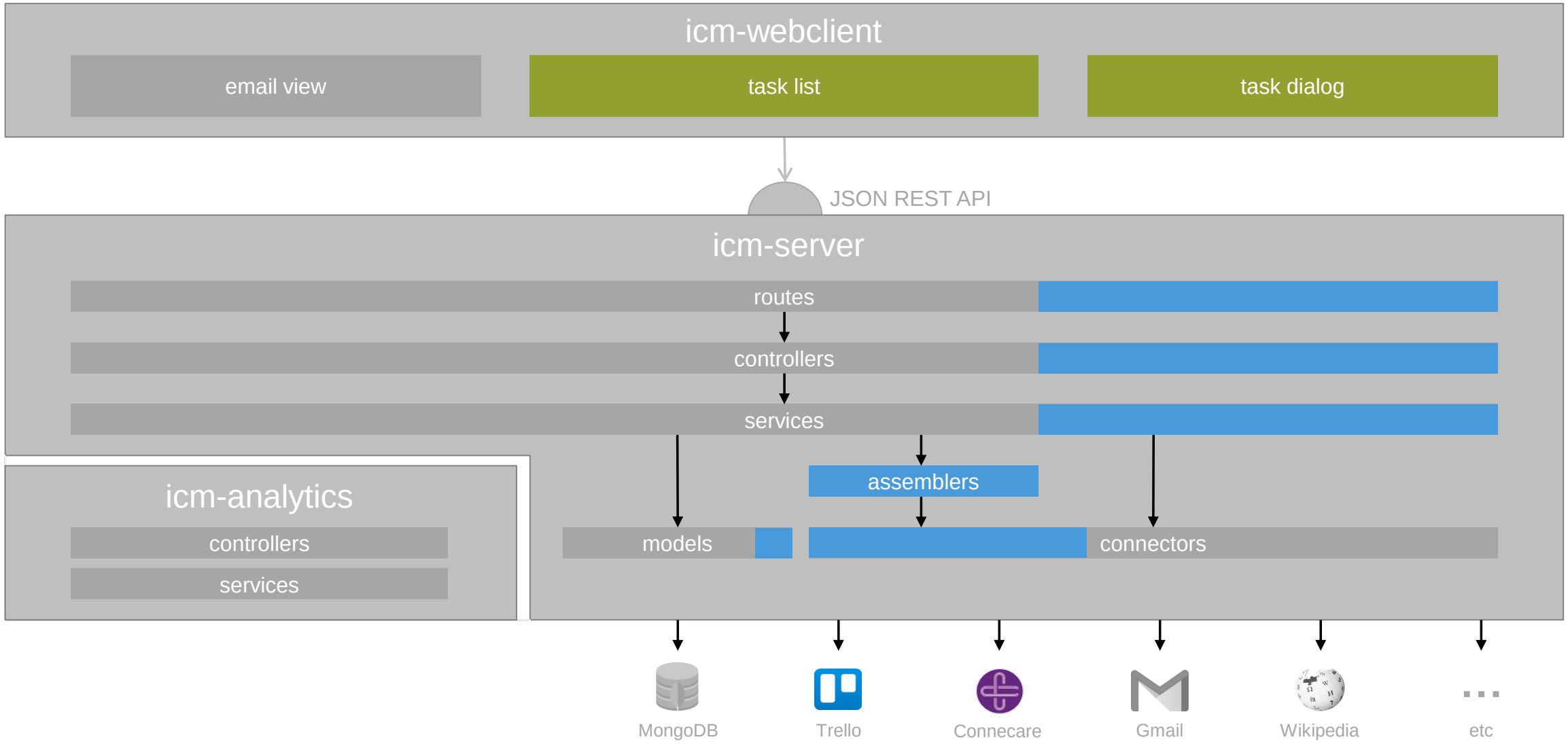
Architecture Overview – Main Contribution



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Initial Research Goals

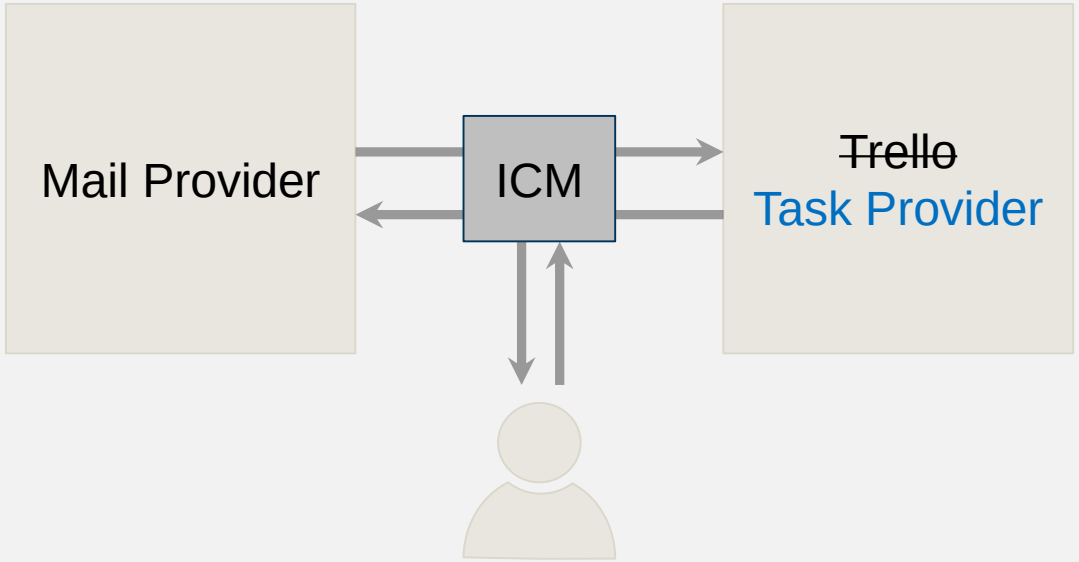
Goal 1

Compare the integration capabilities of existing solutions for email and task management according to a set of relevant characteristics.

Gmail	✓	✓		✓		✓
Outlook	✓	✓				✓
Asana	✓			✓		
Parseur	✓	✓			✓	
Zapier	✓					
Pega Platform	✓	✓			✓	✓
Newton		✓			✓	

Goal 2

Generify ICM‘s task management integration to support multiple task providers and provide a proof of concept by integrating Connecare.



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Conclusion

- Identification of main requirements for a mail client with contextual task support
- Existing tools fulfill only some of the requirements
- ICM manages to do this …
  - … by providing seamless integration between mail client and task management tool
  - … by identifying and suggesting relevant information when creating or editing a task
  - … by enabling users to improve the suggestions using personalized patterns
  - … while maintaining and extensible architecture
  - … but is only a prototype that needs additional effort for productive use (general stabilization, improved error handling)

➢ Paper submitted to **ACM IUI 2019** with minor modifications (Conference on Intelligent User Interfaces)

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B.Sc.

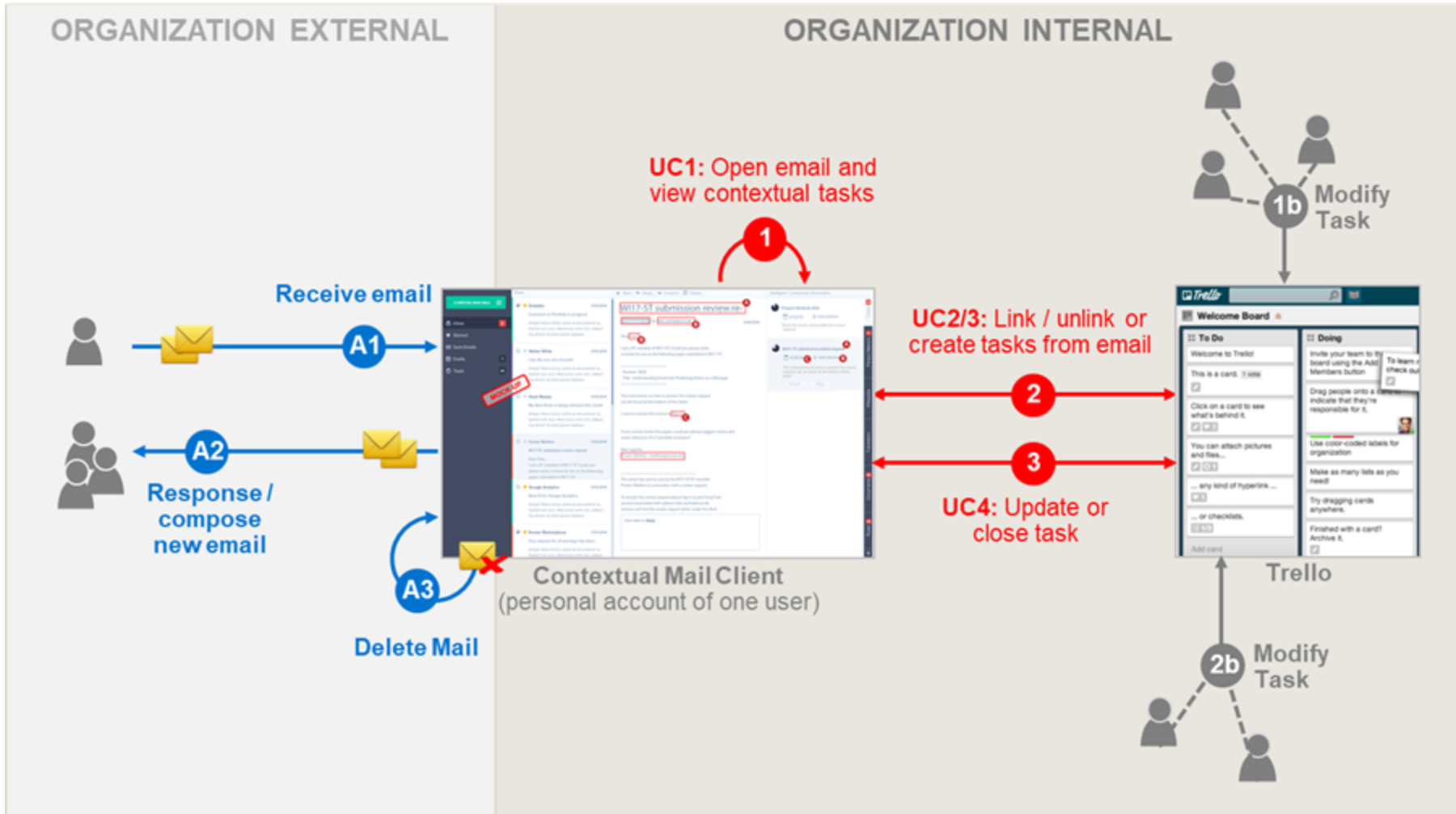
Simon Bönisch

Technische Universität München
Faculty of Informatics
Chair of Software Engineering for Business Information Systems

Boltzmannstraße 3
85748 Garching bei München

ga34toz@mytum.de
wwwmatthes.in.tum.de

Backup



Basic email actions are colored in blue. Use cases are colored in red, optional steps are colored in gray.

Site of Surgery

Context

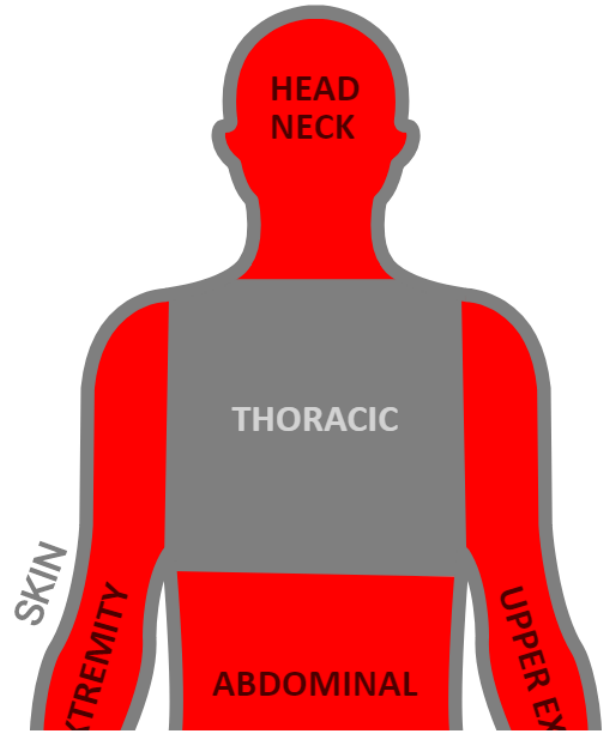
Metadata

Content

Sites of Surgery

- [x] Head/Neck
- [ ] Thoracic
- [x] Upper Extremity
- [x] Abdominal
- [ ] Pelvic
- [ ] Lower Extremity
- [ ] Skin

Site of Surgery



Update | Complete | Terminate | Unlink

TASK

New Email

- STHI Project 1
- INBOX 3
- Drafts
- Sent Mail
- Spam
- Starred
- Trash
- Archive 2017
- Archive 2016

Manage Folders

Synced: 10/8/2018, 10:45 PM

Search...

John Doe 10/08/2018
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Oct 08, 2018, 4:47:45 PM
To: sthi@exampledomain.com

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Search for contacts...
Georges Prettjohn

Dr. med. Georges Prettjohn
Associate Professor | Balistreri and Sons | Sales

- Dr. Dr. Francklin Havenhand
  Purdy LLC
- Gui Le Hucquet
  Koss-Turner

Jamesy George
No company details

- Dr. Adrea Cadalleder
  Schamberger-Goodwin
- Prof. Dr. Whitney Golborne
  Breitenberg, Osinski and Hermann
- Prof. Dr. Dr. h. c. Wesley Anan
  No company information available

Show more... (7)

George Fearnyhough
Operator

- Lilli Smallthwaite
  Hand-Emmerich
- Dr. Rasla Keilloh
  No company information available
- Prof. Elmer Derle
  No company information available

Show more... (7)

Dr. Dr. Georges Bundey
Recruiting Manager

- Deanna Lynas
  No company information available
- Emiline Sture
  No company information available
- Prof. Dr. Dr. h. c. Wesley Anan
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Show more... (7)

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Search Wikipedia...
Systolic blood pressure

Blood pressure (**BP**) is the pressure of circulating blood on the walls of blood vessels. Used without further specification, "blood pressure" usually refers to the pressure in large arteries of the systemic circulation. Blood pressure is usually expressed in terms of the systolic pressure (maximum during one heart beat) over diastolic pressure (minimum in between two heart beats) and is measured in millimeters of mercury (mmHg), above the surrounding atmospheric pressure.

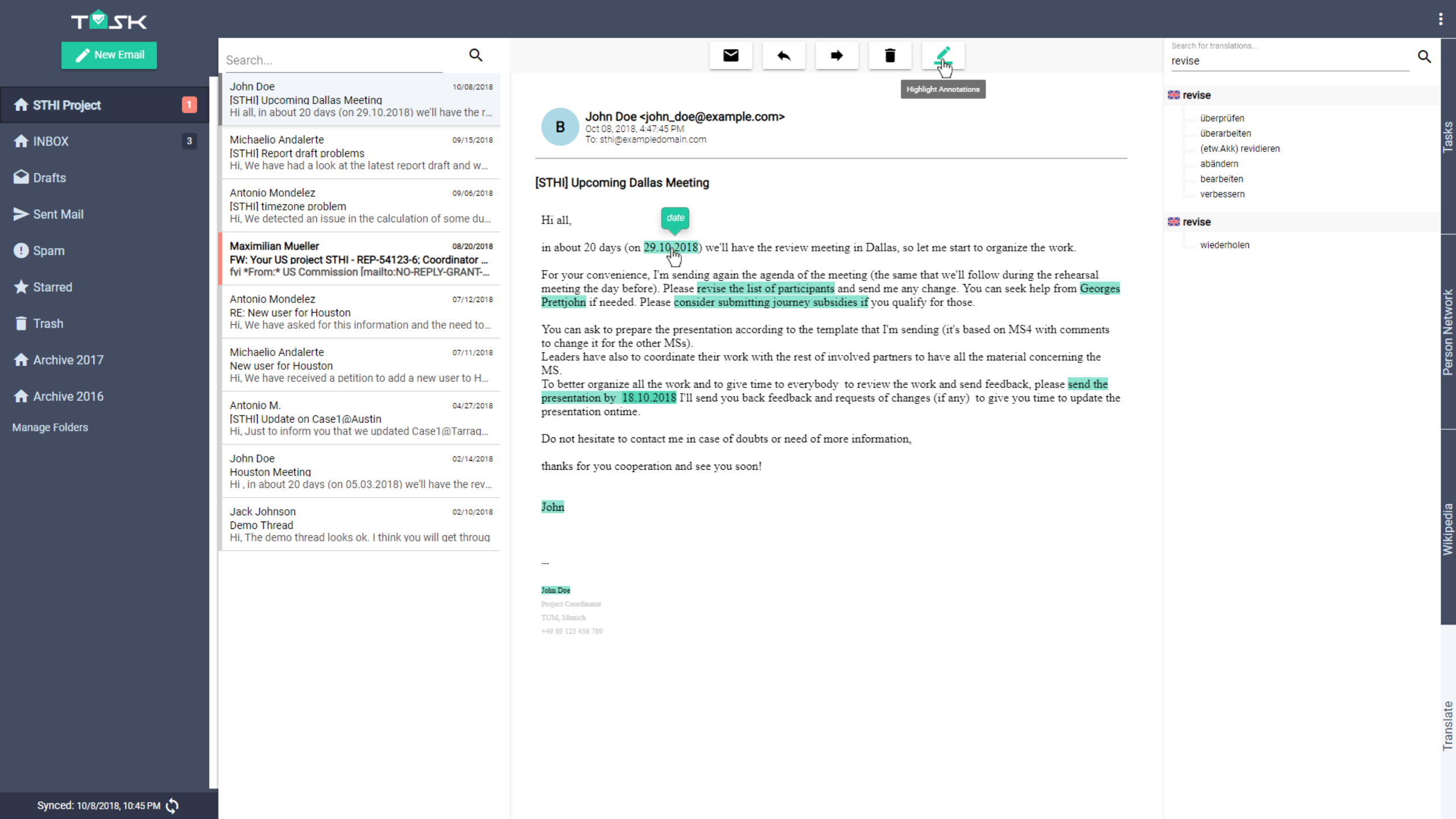
Blood pressure is one of the vital signs, along with respiratory rate, heart rate, oxygen saturation, and body temperature. Normal resting blood pressure in an adult is approximately 120 millimetres of mercury (16 kPa) systolic, and 80 millimetres of mercury (11 kPa) diastolic, abbreviated "120/80 mmHg".

Traditionally, blood pressure was measured non-invasively using a mercury-tube sphygmomanometer, or an aneroid gauge, which is still generally considered to be the gold standard of accuracy for auscultatory readings. More recently other semi-automated methods have become common, largely due to concerns about potential mercury toxicity, although cost and ease of use have also influenced this trend. Early automated alternatives to mercury-tube sphygmomanometers were often seriously inaccurate, but validated devices allow for an average difference between two standardized reading methods of 5 mm Hg or less and a standard deviation of less than 8 mm Hg.

Blood pressure is influenced by cardiac output, total peripheral resistance and arterial stiffness and varies depending on situation, emotional state, activity, and relative health/disease states. In the short term, blood pressure is regulated by baroreceptors which act via the brain to influence nervous and endocrine systems.

Blood pressure that is low is called hypotension, and pressure that is consistently high is hypertension. Both have many causes and may be of sudden onset or of long duration. Long-term hypertension is a risk factor for many diseases, including heart disease, stroke and kidney failure. Long-term hypertension is more common than long-term hypotension, which often goes undetected because of infrequent monitoring and the absence of symptoms.

Tasks
Person Network
Wikipedia
Translate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Search for translations...
revise
revise
überprüfen
überarbeiten
(etw.Akk) revidieren
abändern
bearbeiten
verbessern
revise
wiederholen
Tasks
Person Network
Wikipedia
Translate

TASK

Account
Email Settings
Contact Settings
Task Settings
Patterns

Pattern Management

Current Patterns

- please
- Do you have any idea
- (?<=Could you).*(?:[.!?])
- (?<=could you).*(?:[.!?])

New pattern, e.g. Could you please

Use as Regex