

Long Term Project E-mail Storage

Design Manual
Chapter 21
Automation Tools
Instructions

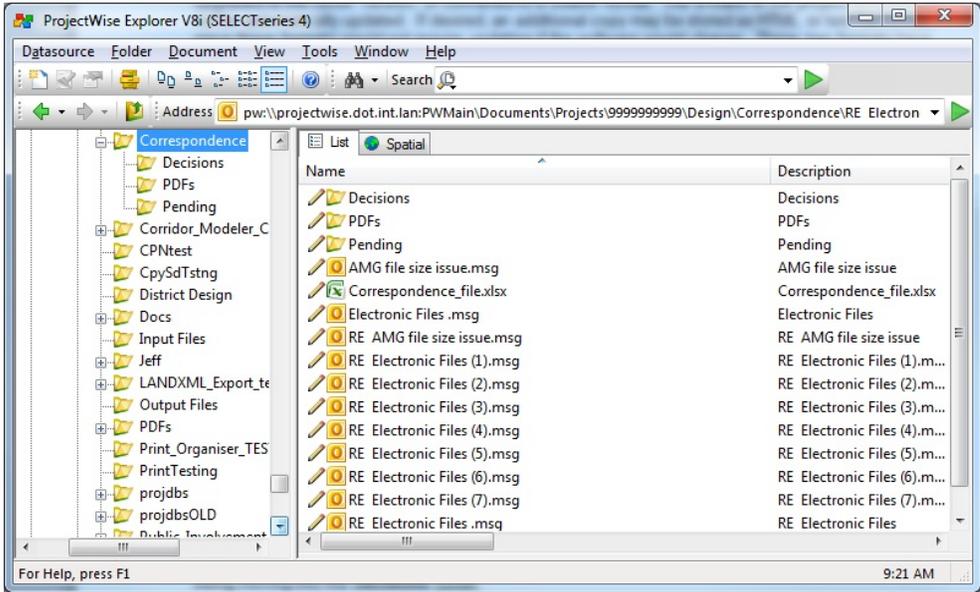
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Storage space available in your Outlook e-mail account is limited. The archive system is the preferred method for long term storage; however, it has limitations in its search capability in that you can only search your own e-mail. That is why project related e-mails should be copied and stored in the project directory e-mail folder so the notes are not lost as people leave the project. This also makes the e-mails more accessible to others working on the project.

Below is the process that can be followed for long term e-mail storage for projects. An associated risk factor is involved with saving the files in this method. Future e-mail software changes may make these files unusable, which is not expected, but certainly possible. It is important to get all e-mails saved in the vault for the long term. As software changes occur, the files stored in the vault will be upgraded to the newer version, or converted to a usable format. The e-mails in the project directory will not be automatically updated. If desired, an additional copy may be stored as HTML or text file format, since these formats would not require updating if the software would change. These two formats have less functionality, but may be less susceptible to changes in software.

On most projects the **Correspondence** folder will have been created upon project directory creation. If the **Correspondence** folder does not exist, the **Correspondence** folder and three sub-folders will need to be created for e-mail storage. The **Correspondence** folder will contain and three sub-folders: **Decisions**, **PDFs**, and **Pending**. This folder could also include an electronic log file of the project decisions, with links to the

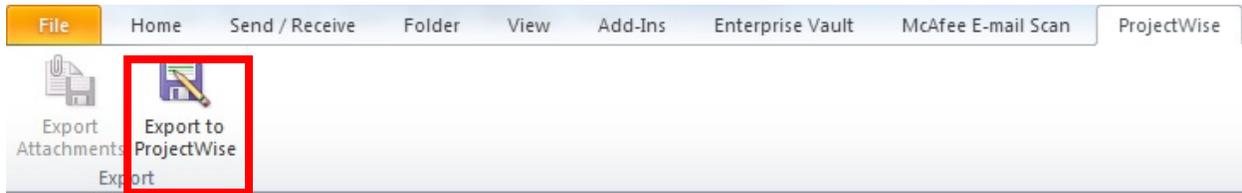
associated e-mail messages. The **Correspondence** folder will contain all project related e-mails. The contents of **Decisions** folder should be limited to only the e-mail correspondence containing final decisions on project topics. The e-mail notes in the **Decisions** folder will be a duplication of some of the notes in the "general" project **Correspondence** folder. The contents



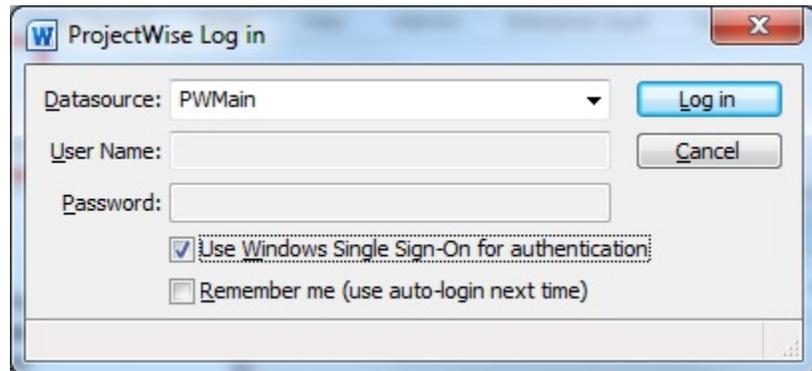
of the **PDFs** folder should be PDF documents relating to correspondence that is not included as attachments in stored emails. The contents of the **Pending** folder should be reserved for e-mails that are awaiting a final decision before being moving into the **Decisions** folder.

With the correct e-mail storage folder structure in place, you are ready to start storing project e-mails.

The first option for storing project e-mails is to open the email you want to store in your project directory or other location. *Click* on the **ProjectWise** ribbon then *Click* on **Export to ProjectWise**, as shown below.



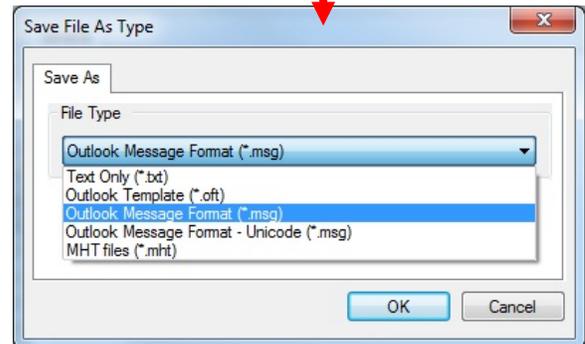
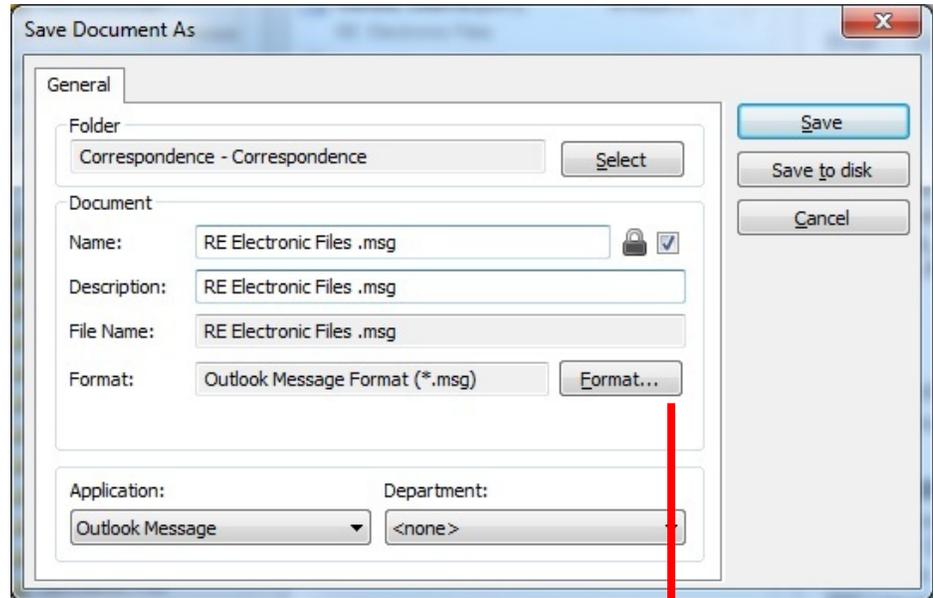
The dialogue on the right may appear. *Toggle* “**Use Windows Single Sign-On for authentication**” to log into the ProjectWise datasource, and *Click* **Log in**.

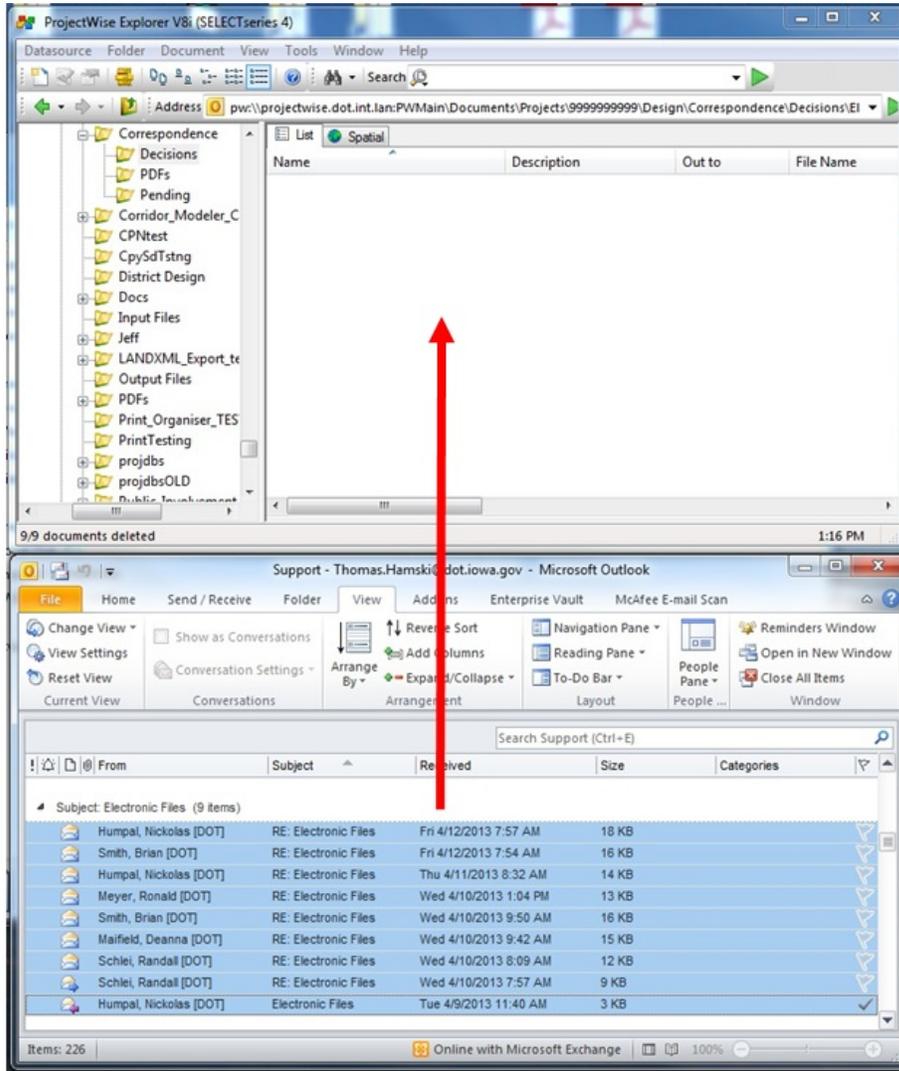


First select the folder inside ProjectWise to save the e-mail to by *Clicking* on **Select** button. Then browse to the correct folder to save the e-mail into.

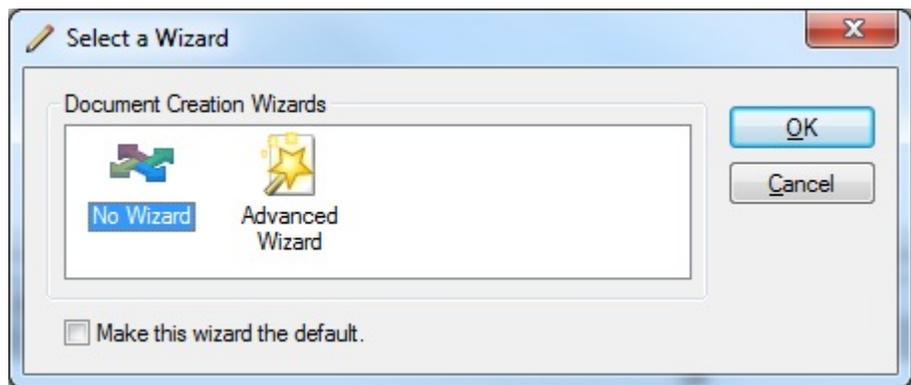
By default, the system tries to use the “e-mail subject” as the name for the stored email file. If the file name already exists, add something to the end of the name to differentiate it, such as 1...2. The “**Format**” field should be set to the “**Outlook Message Format (*.msg)**”, shown to the right. If the format is not “*.msg” format *Click* on **Format...** and select “**Outlook Message Format (*.msg)**” and *Click* **OK**. Saving e-mail in this format retains all the searching and sorting capabilities of Outlook. This process will also work while using the Citrix system. Saving your e-mail in this manner improves the accessibility of these messages for other versions of Outlook.

This method will only work with ProjectWise Office integration turned on. If you do not have ProjectWise Office integration turned on, the “drag-and-drop” method will have to be used. This method is simpler to use than exporting directly from Outlook for one or multiple emails. Outlook must be running locally to use the “drag-and-drop” method. Open ProjectWise Explorer to the folder where the e-mails are to be placed. Highlight the e-mails that are to be copied. *Click-and-Drag* these files from the Outlook folder and *Drop* them into the **Correspondence** folder. Using this method makes the e-mail available while using the same or a newer version of Outlook than was used when they were stored.

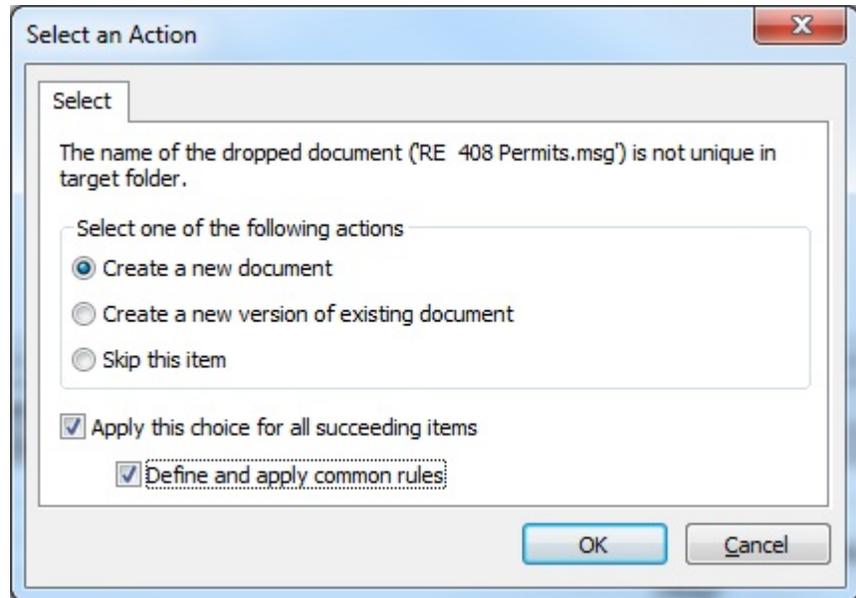




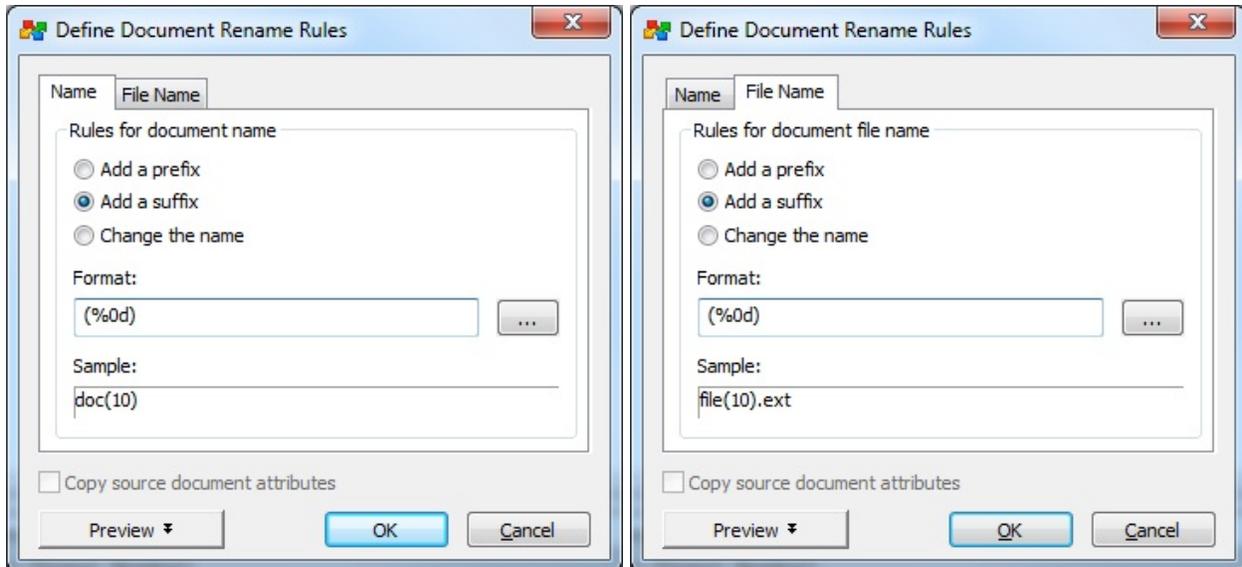
After dropping the messages into ProjectWise, the following window may appear. Select **No Wizard** and *Click OK*. If you *toggle* **Make this wizard the default** you will no longer see this window pop up when moving files into ProjectWise.



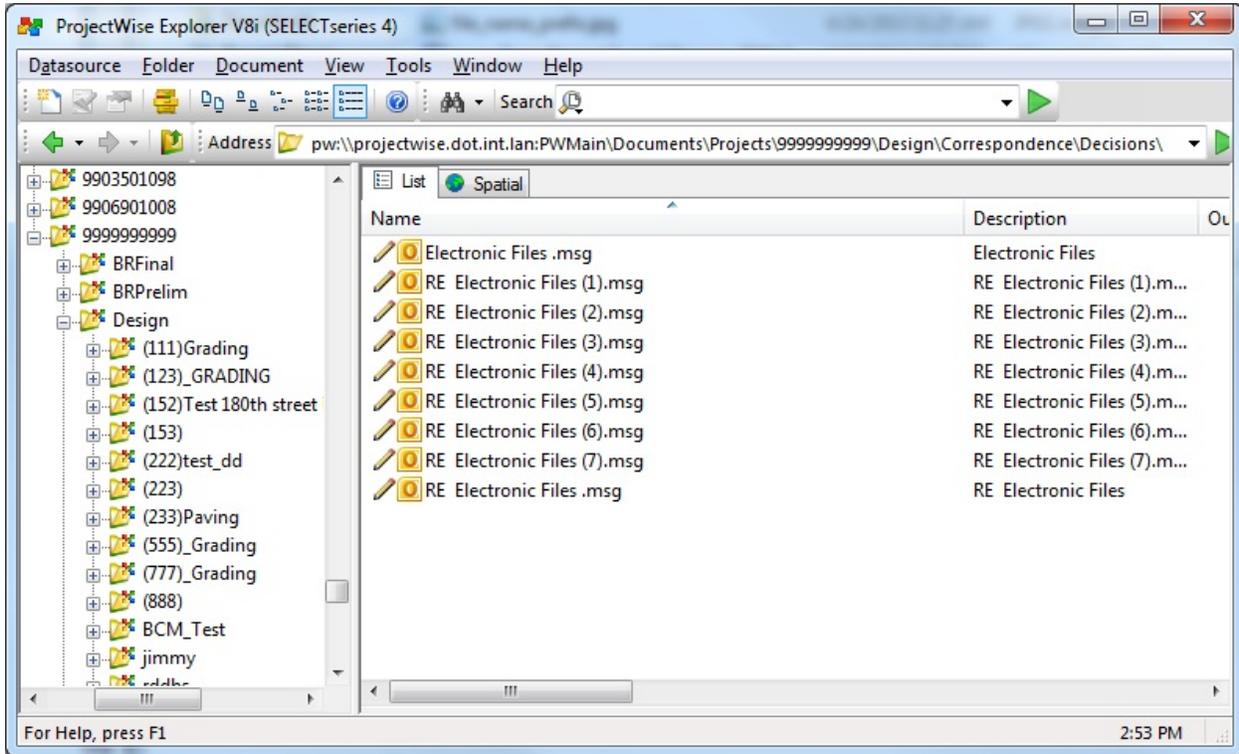
When storing emails with identical subjects, ProjectWise will give a notice that the document title is not unique. To create numbered suffixes attached to end of the file name similar to the functionality of Windows Explorer, select **“Create a new document”** and *toggle* both **“Apply this choice for all succeeding items”** and **“Define and apply common rules”**, and then *Click OK*. These options are only available when there are two or more naming conflicts.



To define the suffix ProjectWise will add to each duplicate name, select **“Add a suffix”** and in the format box *type in (%0d)*. Do this for the **Format** text box for both **“Name”** and **“File Name”** tabs. This will add incremental numbers in parentheses to the end of each file name that is a duplicate.

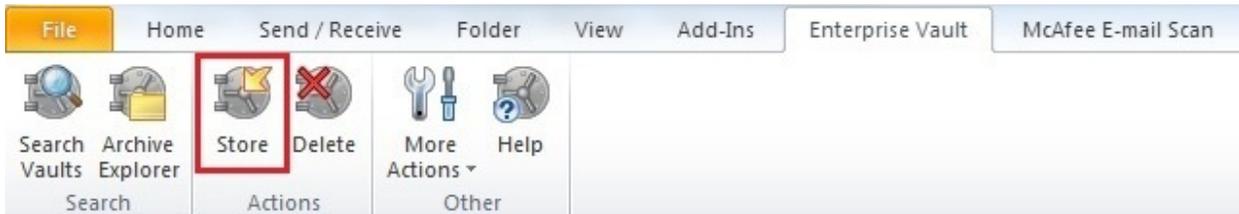


The files should display in the **Correspondence** folder (in .msg format) with the subject as the name.



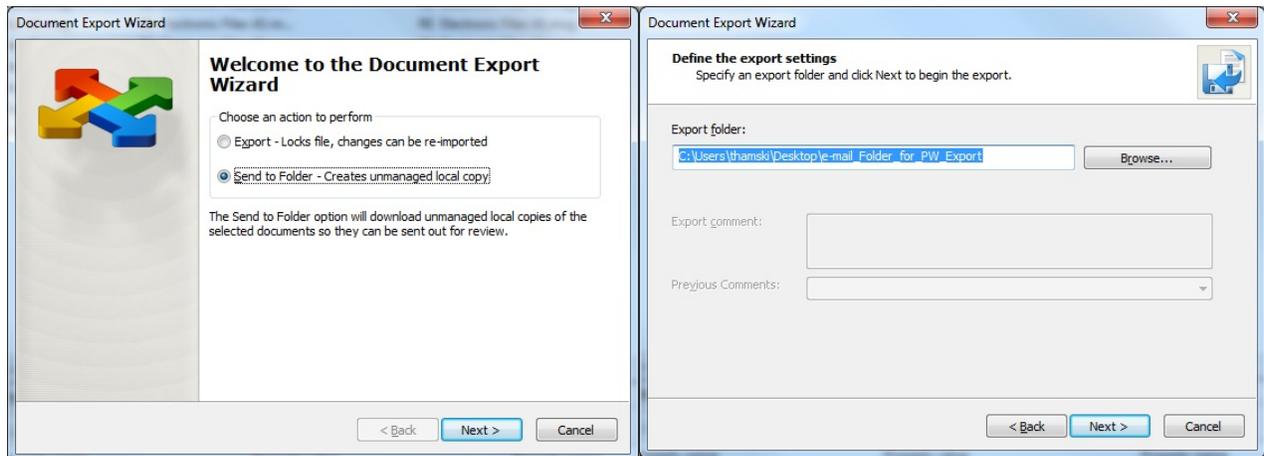
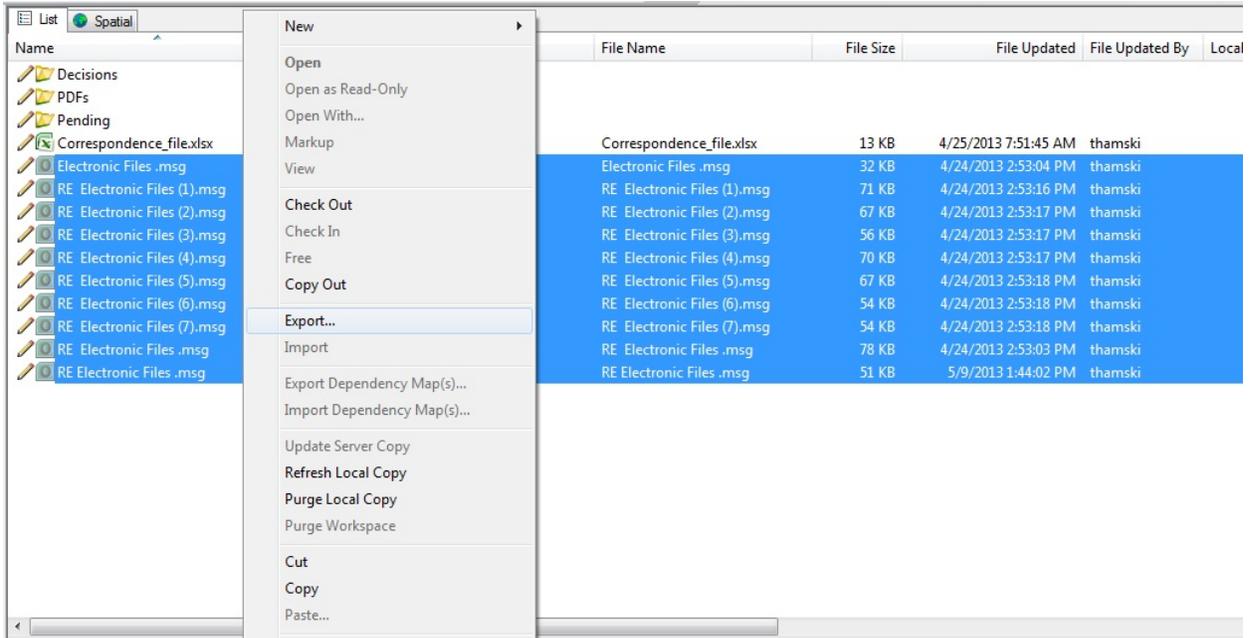
The e-mails can be opened by *double-clicking* on the file. It should open in Outlook, and should have retained all of the formatting and attachments.

Once the project e-mails have been copied to ProjectWise, the originals can then be stored to the permanent storage e-mail **Vault**. Moving the original project e-mail to the **Vault** will help to avoid exceeding the limit of “active e-mail storage”. If e-mail is not manually moved to the vault, it will be automatically sent to the vault when it reaches 6 months old. To move notes to the vault, highlight the e-mail, then select the “**Store**” button on the Enterprise Vault ribbon.



This will store the e-mails in your **Vault** and remove them from your active e-mail file. Once an e-mail has been stored to the **Vault**, it can be “copied” back out again, if desired, but it can never be removed from the **Vault**.

To search these files in Outlook, you must export the emails from ProjectWise to your computer, then drag-and-drop them into an empty Outlook folder. You should create a new Outlook folder named **SearchFolder**, and export the e-mails to a folder on your local machine. First create a folder on your desktop for temporary storage of e-mails to be moved into the search folder. To export the e-mails select all e-mails you want to export, then *Right-Click* on the e-mails and *select Export*.



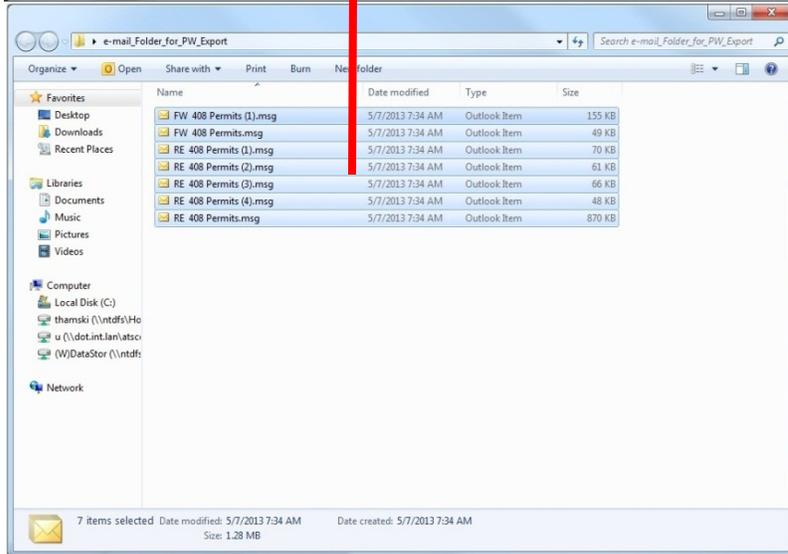
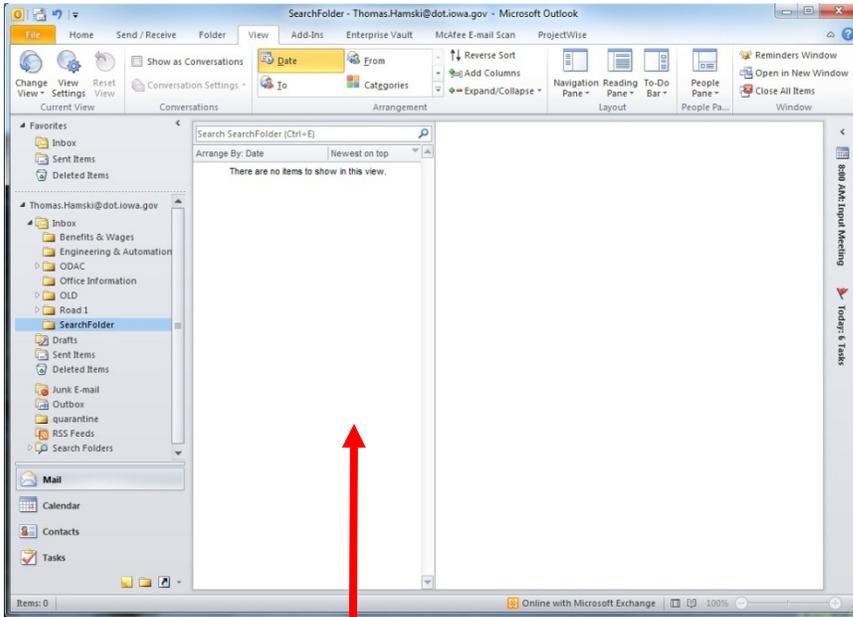
Select **Send to folder** and *click Next*.

Click on **Browse** and select the folder created on your local machine for temporary storage of e-mails to be searched. *Click Finish* on the next window.

Select (highlight) the e-mails to be searched and *click-drag-and-drop* them into the empty Outlook **SearchFolder**. The full functionality of Outlook can now be used to search the e-mails.



When the search is complete, delete the e-mails out of the SearchFolder and the temporary location on your local machine. The original email(s) will be retained in the Project e-mail storage folder. Leaving e-mail(s) in the **SearchFolder** when they are no longer needed will cause future searches to be more difficult and will unnecessarily use server space.



Chronology of Changes to Design Manual Section:

021M-041 Long Term Project E-mail Storage

1/15/2014 Revised
Revise section to address changes associated with move to ProjectWise.

3/31/2009
New material.