2.1 Email Design Brief

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Overview

This UserGuide provides a general overview of the **iProjects** Email module. For more detailed information on the system, see UserGuides ***2.2: Email User Manual.***

Email is, today, the dominant method of communication between various members of a project team, having surpassed telephone and "snail mail" as the preferred way to exchange information.

Standard features in all email systems – the ability to copy others, attach documents, respond to email by selecting from those copied, and adding new recipients – all these create a communication structure of huge complexity. Email "threads" can go on and on with multiple versions of the original message each taking on "lives of their own" and often morphing from the original topic and project to other projects and topics. This complexity makes efficient management of email difficult and problematic.

In building an email system for **iProjects**, we have considered all of these issues, and have tried to create a new approach that finds an optimum point of usability, particularly in consideration of controlling unnecessary proliferation of email.

Basic functionality:

iProjects Email connects incoming and outgoing email to both people AND projects, easily and simply. Output system documents, typically .pdf files saved from entering data in a form, can be emailed ***direct from the form***, thus saving huge amounts of time for users.

Privacy:

Another key issue is that of privacy. We have resolved that in the same way that the industry leader in email management, Newforma**™**, has: All email assigned to a project belongs to the firm, not the individual. Accordingly, unless an email is restricted as to who has access to it, all project email can be accessed by anybody in the firm.

Many email messages are not project-related. For example, they may be about possible future projects, about services the firm might need, about materials the firm could specify on its projects, and so on. To manage firm non-project email, we provide "project-like", user-definable categories – that can be restricted or unrestricted.

This approach presumes that all firm staff will have their own email client (indeed, the vast majority will have one or more) and that personal email should be managed using these tools, not the office email system.

Certainly there is the possibility that someone will send an email to a staff member on the office email system. The recipient can either respond to the email and delete both the incoming or outgoing message – or forward it to their own email service, delete the incoming message, and deal with it outside the firm email system. This approach is simple and avoids the issue of email privacy.

Restricted mail

Restricted mail is email in or out that is tagged as restricted and can be seen only by those in the firm that have permission to see restricted email.

Permissions are controlled by the System Administrator. In general, the assumption is that firm Directors can see restricted email, but that is up to the Directors to decide.

Attachments

Attachments are a significant issue, requiring thought and care. Many practices already have well-developed hierarchical structures for storing various documents.

Only a fool would tell a prospective customer that this structure would have to be replaced by another – so we need to have the flexibility to adapt to whatever system the firm now has.

Other firms work on the "chaos" theory of storage, and either have well-intended but dysfunctional or never-implemented systems, multiple systems, or none at all.

For firms in the latter category, we think that some guidance in document storage is necessary if they are to successfully implement the **iProjects** design management system. Accordingly, we will provide a simple, modifiable "default" structure, but give firms the option of using their own. When that structure is ready, it will be posted under UserGuide 2.3: ***Suggested Document Storage Structure.***

Document management

Document management systems must be scalable. Big projects need at least three levels of classification, but – properly managed – shouldn't need more. Medium projects usually need two, but in some cases, will require three. A common example is that firms will have a 1st tier category for Consultants, a 2nd tier category for Disciplines, and a 3rd tier category for specific consultants in the discipline. Small projects may need one or two tiers, depending on the complexity of the project.

Fortunately, the underlying structure of **iProjects** can reference to any document residing anywhere on the firm's server, so flexibility is not a big programming issue.

What is important is that any time a project document is created, that it have a "home" – a dedicated storage "cubbyhole" that can be tagged for easy retrieval. In order to receive and download attachments, users need to assign a folder where these attachments can be temporarily stored (called an "Attachment Path") until they are moved intoi the firm's hierarchical filing structure.

Regardless of how a firm chooses to manage documents, a folder for project documents must be linked to a project, so that **iProjects** documents, as well as all other project documents, are accessible when needed. In general, the path to project documents is project number + project name; however search fields can be used to locate one or the other if necessary.