Project Email Quick Reference Guide

This topic provides a reference for the Project Center **Project Email** activity center.

Purpose

Use the **Project Email** activity center to gain control of the flow of project information into and out of your email inbox and ensure that project-related email messages are captured as part of the project record. It allows the valuable knowledge that is so often buried in each project team member's inbox to be readily available, searchable and usable to the rest of the internal project team.

Audience

Internal project team members.

Key Features

- File project related email with your project data so your entire team can retrieve, search, and reply to it.
- Browse, sort, filter, and search the email and associated file attachments that have been filed to the project.
- Frees up space in your Inbox and frees resources on your mail server.
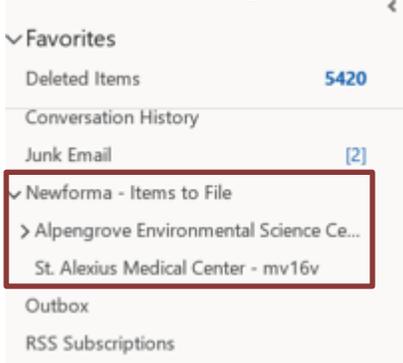
Filing Project Email

There are three primary ways to file email from Outlook to a project:

- Move email to the **Newforma-Items to File** folders
- Use the **File in Project** button on the Project Center Add-in for Microsoft Outlook toolbar
- File sent items using the **Send and File in Project** button in a new e-mail

To file email using the Newforma-Items to File folders

The **Newforma-Items to File** folders are created in your Inbox for each project added to your **My Projects** tab in Project Center. Email is moved from the **Newforma-Items to File** folders into your project folders on your file server so that everyone who has access to the project can view and act upon the information in the email.

1. To file an email, drag and drop it into the correct project folder within the **Newforma-Items to File** folder.
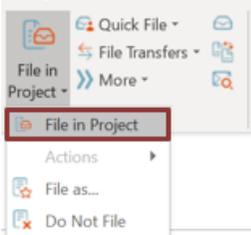

2. These emails can now be seen by all those who have access to the project through the **Project Email** activity center.
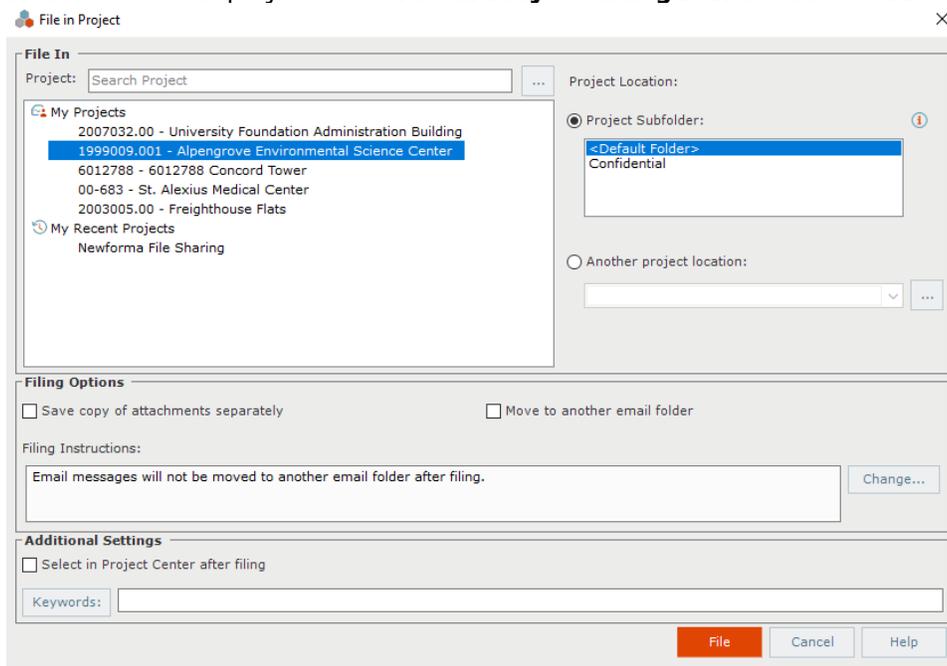

To file email using File in Project

The **File in Project** option in the **Project Center Add-in for Microsoft Outlook** toolbar files email to your project immediately. It also allows you to file e-mail to any project. This option can be configured to leave a copy of each email in Outlook after it has been filed.

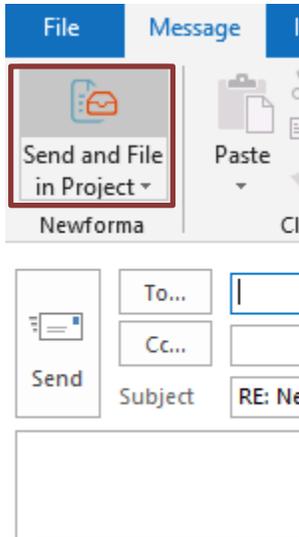1. Select the messages you want to file and select **File in Project**.

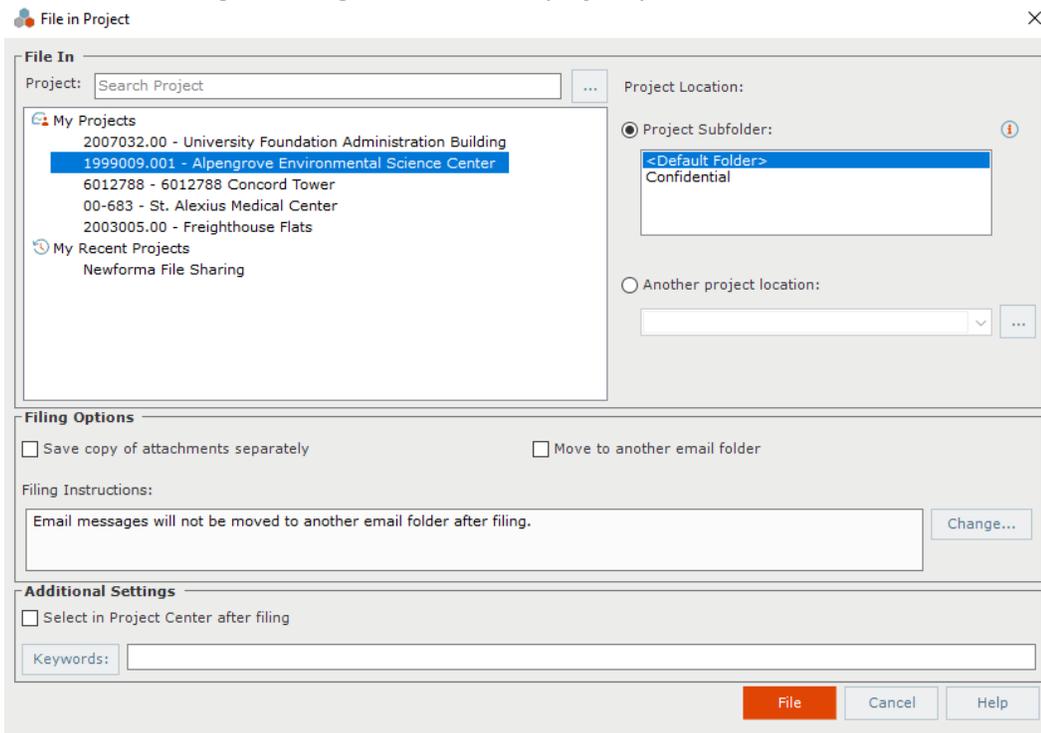2. Select the correct project in the **File in Project dialog box** and select **OK**.

To file sent items

The **Send and File in Project** button in a new email or reply allows you to file email to the project as you send an email.

1. Create a new email as usual. When you are ready to send the email, select **Send and File in Project**.

2. In the **File in Project** dialog box, select the project you wish to file the email to and select **OK**.

*If you forget to use the **Send and File in Project** button when sending a new e-mail simply open your **Sent Items** folder and either drag and drop the email to the appropriate **Newforma-Items to File** folder or select **File in Project**.*

To work with the Project Email activity center

1. In the **Project Email** activity center you can display, filter, sort, and preview all of the email filed in your project.

2. Select **Open with Microsoft Outlook** in the **Tasks** panel to open the email to forward or reply.