

Project Overview

Project: Project-Email Management System

Industry: Engineering and Projects

Customer Profile:

It is a Germany based organization which is into everything from turnkey all-inclusive plants to high-performance individual components.

Requirement:

Being into turnkey projects and solutions, the tenure of projects are generally for a long duration - around 5-6 years. The company wanted a system which would help them in managing all their project emails, since there is a lot of inbound/outbound mails for each project, they need an interface with advanced options to store and view all the emails.

There was another requirement where the Project Managers who were at remote locations on client site, did not have internet connectivity but still needed the emails to stay in touch. So a system was required where the emails can be retrieved even when offline.

Solution:

After studying and analyzing their problem, Adapt proposed and developed an Email Management System where all the emails related to a project can be created, stored and later on retrieved. It involved integration with exchange, Add-On for outlook, and offline application to be built. Please read below to get the glimpse of the solution.

The projects are created within the system which would automatically create a library structure for the project. Different users have permissions to create, reply and save an email to the system. An outlook add-on was created where users can directly click and send the emails from their outlook to

SharePoint project library. An automated number generation was created by the end user for each project which would be prefixed to all emails created and sent from the system for that project and it will also get appended to the mails that were saved by users from their outlook.

Each project had its own contacts which can be created or imported from Microsoft Excel. Also, the contacts can be copied from within one project to another. All the emails that were created or uploaded from outlook, were stored under the project folder, with various metadata fields. Fields like Subject, From, To, Date etc. were extracted and stored as metadata fields. Also, additional tags can be defined and mails can be tagged with the extra defined ones. These all metadata fields helps is quick retrievals of emails.

An integration of system with Microsoft Exchange server was done. The emails sent from the system are sent via the Exchange so users have the Sent Emails on their outlook as well. Also an offline application is developed for the emails to be handy with the project managers when they are outside the office to a remote location. The project managers can sync the project data in the offline application with the online SharePoint system whenever they are moving to the client location to get the updated backup of all the emails.

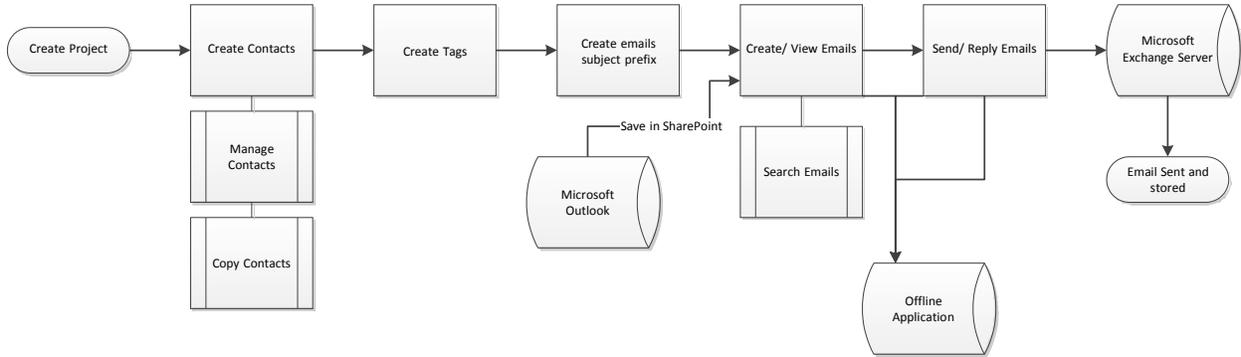
Technical Explanation:

Along with the custom coding, 16 Web parts were built, 1 Event Receiver, Out of box list and libraries were used, Outlook Plug-in was built to save E-Mails in SharePoint Site from Outlook, according to user permissions and an offline application to download mails from SharePoint Site and main offline search etc.

Technology Used:

- Microsoft SharePoint Standard 2010
- LinQ
- XML, Excel 2010 processing
- C#, Oledb Connection (to Read Excel)
- Java script/ J-Query
- SharePoint Designer
- Exchange API's

Process to Store and Retrieve Project Related Emails:



Search and Retrieve Emails based on Metadata Filtering:

- Project Browser
- Create Project
- Search E-Mail
- Draft E-Mails
- User Signatures

Search Email

Subject	<input type="text"/>	Tags	--Select--
To	<input type="text"/>	Cc	<input type="text"/>
From	<input type="text"/>	Project *	J SPL
Email Date	<input type="text"/>	Folder Type	--Select--

Results								
📧	From	To	Cc	Subject	Email Date	Email Folder	Details	History
	jack@gs.com	gest@get.com; gre@gs.com	xyz@et.com	JS-SM1-FIN-007 RE: Video Bridging	9/27/2013 4:41:00 PM	Finance	View	View
	jack@gs.com	jill@gs.com	praty@ut.com; test@ut.com	JS-EnA-GCP-006 JS- SMI-PA1-00 Test10	10/4/2013 12:22:11 PM	Electric and Automation	View	View

1 2 3 4 5 6

Create, Reply & Forward Emails from the System Itself:

PEMSTest

Project Browser
Create Project
Search E-Mail
Draft E-Mails
User Signatures

Forward Email JSPL(JS)

Source Folder Type: 20 Consortium Partners Source Email Folder: Partner1

Target Folder: * 50 Internal
Target E-Mail Folder: * Electric and Automation
Target Department: * Electric and Automation
On Behalf of: -- None --

* To.. Commercial DTS ;
CC..
Bcc..

Note Adresse
* Subject JS-SMI-PA1-001 | Test10

Attachment: Browse... Browse...

* Body

Select Project Tags:
 finance
 sales

Save Discard Send