

Email Management

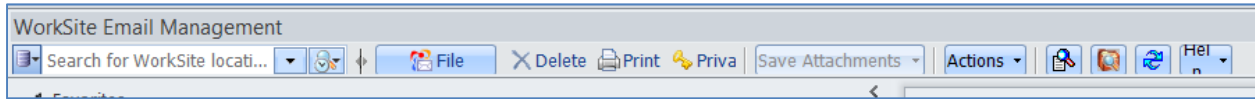
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Worksite Email Management Toolbar







Emails are records of the Corporation and subject to the Records Management policy. To help you iManage your emails, WorkSite adds a set of advanced email management features into Microsoft Outlook.

These features are all accessed through the WorkSite Email Management toolbar.



The following table displays the icons and what their functions are.

Icon	Item	Description
	Database drop-down menu	A drop-down menu that enables you to define which databases should be included when performing a search.
	Suggested Locations/Search field	A field that displays suggested filing locations to choose from and enables you to search for workspaces.
	Recent searches drop-down menu	A drop-down menu that displays your recent filing location searches.
	File button	An action button that enables you to file the selected email to the location specified in the Suggestion field.
	File and delete	File the email and delete after filing
	File and print	Print the email before filing
	File and mark as private	File and mark email as private
	Resize slider	Drag to resize the suggested locations/search field
	Save attachments	Enables you to save attachments to iManage
	Actions drop down menu	Enables you to perform FileSite actions on selected emails, such as copying or moving emails or importing documents to iManage.
	Properties	Displays the Properties of an email that has been filed or selected to be filed.
	Where Filed	Displays the location of an email that has been filed or

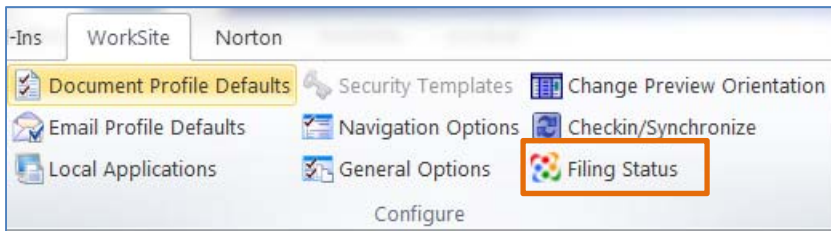
Icon	Item	Description
		destination container of an email selected to be filed.
	Document Search	Opens a search form for a document search.
	Workspace search	Opens a search form for a Workspace search
	Refresh button	Refreshes the display when showing WorkSite content.
	Help button	Enables you to select the relevant online help file needed.
 WorkSite Help  Email Management for Outlook Help		

Changes to the Outlook View

The Email Management component in Outlook adds new columns to the Outlook list view as well as several new message icons.

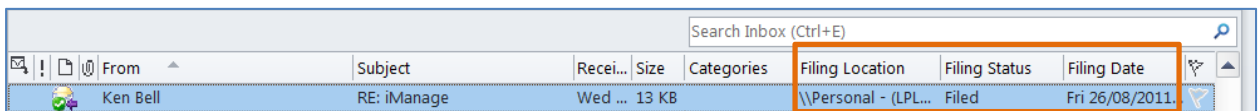
Filing Information Columns

Enable the filing information columns for Outlook by clicking on the WorkSite menu -> **Filing Status**.









By enabling Filing Status, the following 3 columns will be added to your Outlook list view.

- **Filing Location** – the location in iManage where the email is stored.
- **Filing Status** – the status of the filing process (Queued, Sent, Filed, or Filing Error).
- **Filing Date** – the date the message the filed.



Message Icons

When an email is filed from your Outlook mailbox, the icon is updated to reflect the filing status:

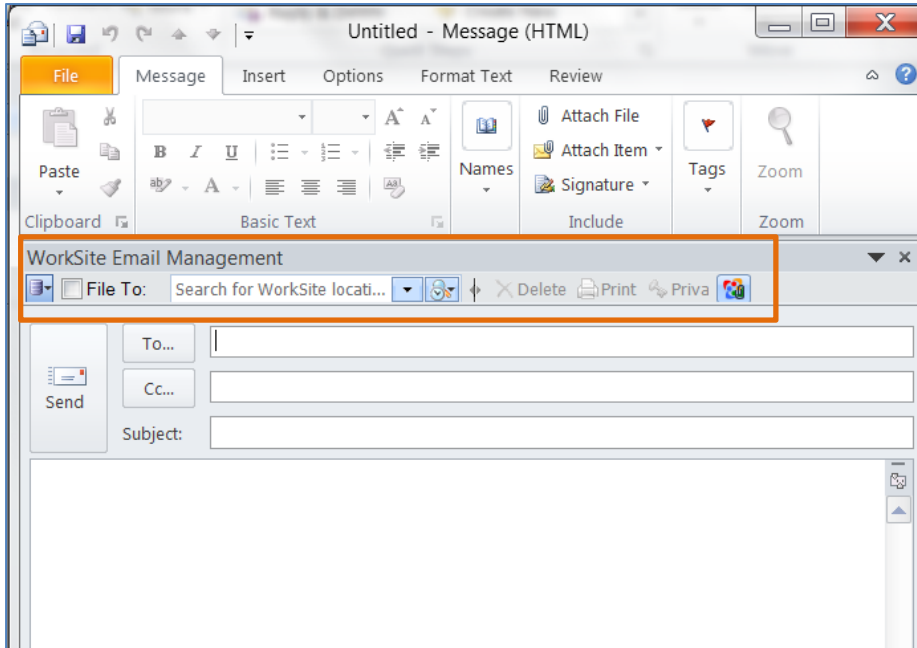
Icon	Status
	Filed to WorkSite
	Sent and Filed - shown in Sent Items folder for Send and File
	Queued to be filed to WorkSite
	Filing error
	Sent and Filed - shown when user replied to an email that was filed to iManage
	Sent and Filed - shown when user forwarded an email that was already filed to iManage

Filing an Outgoing Message

The best way to manage your emails is by filing them as you send them. There are 2 ways to accomplish this: Using the **message window filing toolbar** or the **Send and File** option.

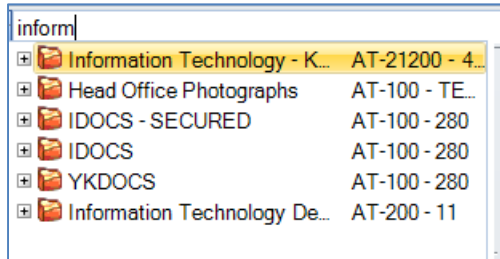
Message Window Filing Toolbar

A toolbar, similar to the WorkSite Email Management toolbar, appears in a new message window.



To file the email to iManage on send using the filing toolbar:

1. From the filing toolbar, select a filing location using one of the following methods:
 - a. Type the name of a workspace in the **Suggested/Search** field to perform a search for a destination workspace. A list of suggested filing locations and recent filing locations will be shown. Click the + button beside the workspace to find a folder within a workspace.

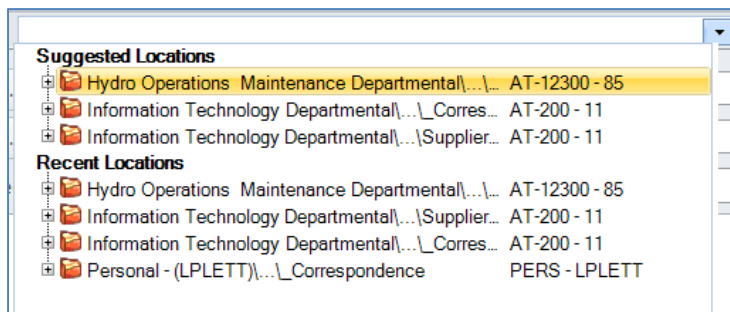


- b. Click the drop-down arrow on the Suggested/Search field and select from the **Suggested Location** or from the **Recent Locations**.

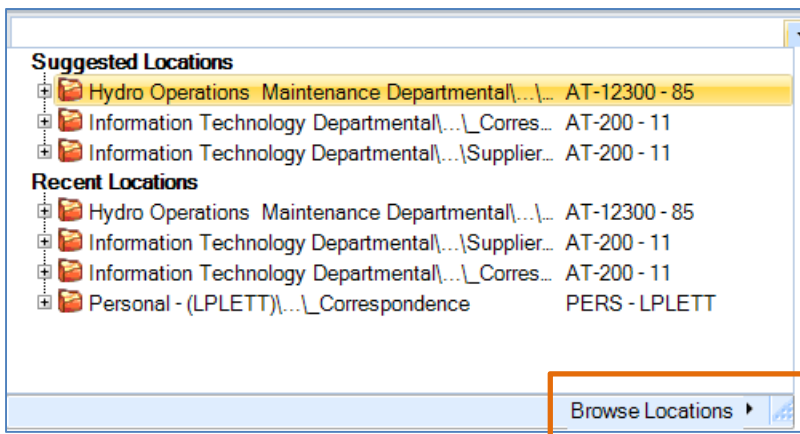
Whenever you file an email to iManage, key information about the email message and where it was filed is stored. This information is stored for 90 days. When you send a new email message or attempt to file an email message to iManage, it examines the following information in the email and offers suggestions based on previous emails that you have filed:

- The subject of the email
- The conversation ID that Outlook applies to messages that are part of the same conversation thread.
- The sender
- Any filing tags appended to the subject of the email. See “Tagged Messages” on page 26 for more information.

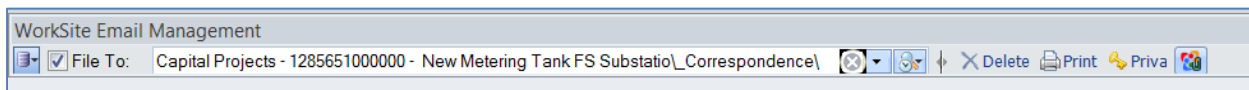
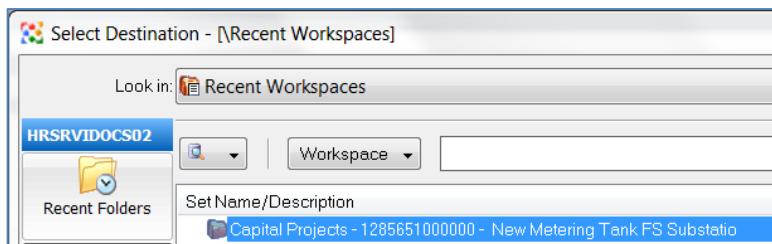
iManage then ranks the suggested locations and displays them under the **Suggested Locations** list.



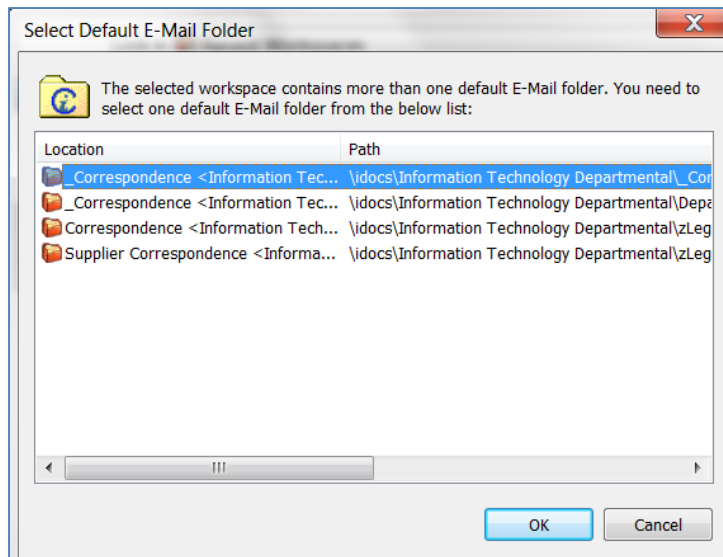
- c. Click the **Browse** button in the Suggest Location/Recent Location box to manually select a location from the Worksite Integrated Desktop window.




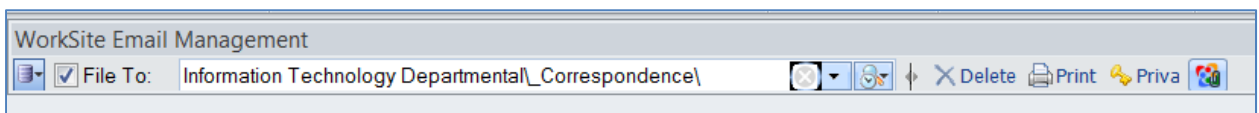
- 2. In every workspace there is at least 1 **_Correspondence** folder. If you just select a workspace, the filing location will default to this folder. For example, if I select a capital project workspace from the document grid on the Select Destination window and then click Select without choosing a folder within the workspace, it will default to the **_Correspondence** folder.



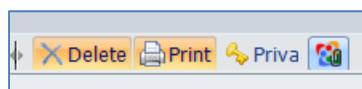
If the workspace has more than 1 **_Correspondence** folder within it, a dialog box will pop up and ask you which of the **_Correspondence** folders you would like. For example, if I select the Information Technology Departmental workspace it has more than 1 **_Correspondence** folders.



- Once you have selected the folder you wish to file to, the location will display in the suggested location/search field and a checkmark will be added to the File To checkbox indicating that when you send the email, it will be filed to the location shown. A grey icon  will also appear beside the drop-down arrow. This allows you to clear the field and select a different filing location.



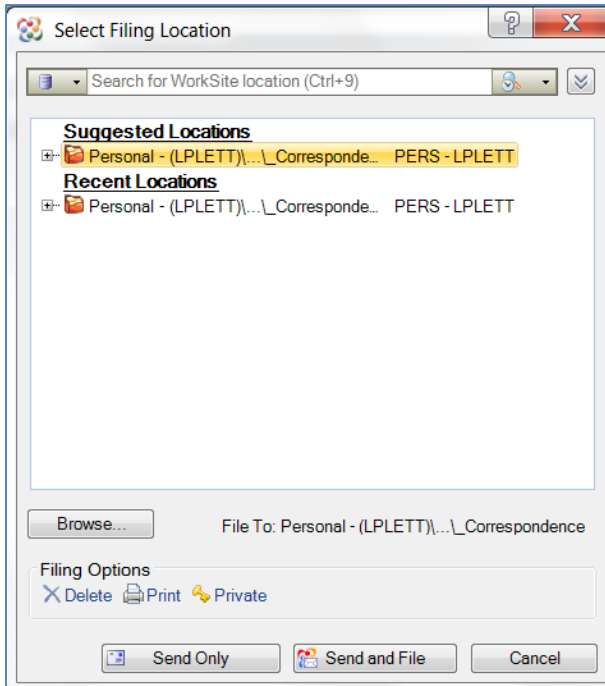
- If you wish to Delete or print the email immediately after sending, you can click on the Delete and Print buttons.



- Click Send.

Send and File

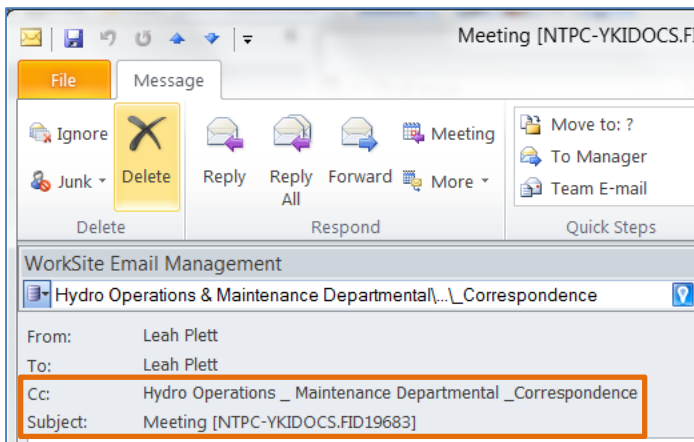
If you do not select a location from the filing toolbar before you click Send you will be prompted to select a location. As with the filing toolbar, you can select a location from the Suggested or Recent Locations list, use the Browse button to find a workspace and folder or use the recent searches dropdown. Once you have selected a location click **Send and File**.



If you choose not to iManage the email on Send, just click the **Send Only** button.

Filed Email Tags

When you send and file an email message, a **tag** is added to the subject line of the email in brackets. The format of the tag is <Subject of the Email> [Company – Database.FolderID]. Every folder in iManage has an alpha-numeric folder ID associated with it. To make it more user friendly, the actual name of the workspace and folder is displayed in the CC line.

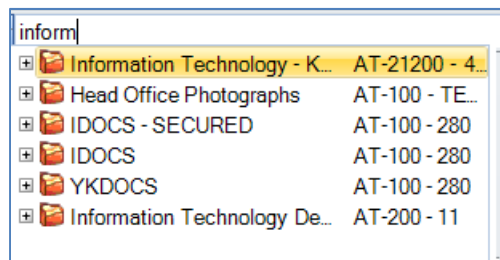


If you receive an email, you can easily see from the tag that the sender has already filed the email to iManage and to what folder. If you receive an email that has been iManaged and reply to that email, leave the tag in the subject line and the email will automatically file to the same location as the original received message. The Email Management system is intelligent enough to check for duplicates. If an email has already been filed to a specific folder it will not file a second identical email to that folder.

Filing Existing Emails in Outlook

The email management toolbar enables you to quickly file existing emails from Outlook. These could be emails residing in your inbox, sent items or cabinet folders.

1. Select the email message(s) to be filed.
2. Choose the iManage workspace and folder from the email management toolbar using any of the following three methods:
 - a. Type the name of a workspace in the **Suggested/Search** field to perform a search for a destination workspace. A list of suggested filing locations and recent filing locations will be shown. Click the + button beside the workspace to find a folder within a workspace.



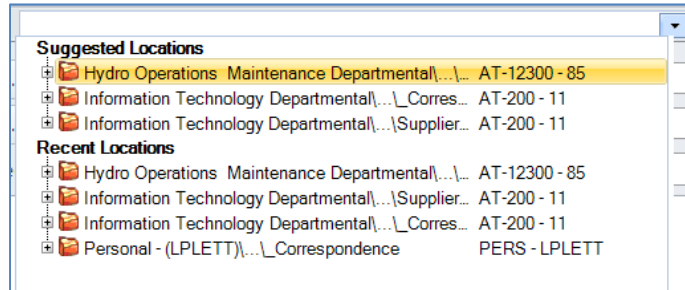
- b. Click the drop-down arrow on the Suggested/Search field and select from the **Suggested Locations** or from the **Recent Locations**.

Whenever you file an email to iManage, key information about the email message and where it was filed is stored. This information is stored for 90 days. When you send a new email message or attempt to file an email message to iManage, it examines the following information in the email and offers suggestions based on previous emails that you have filed:

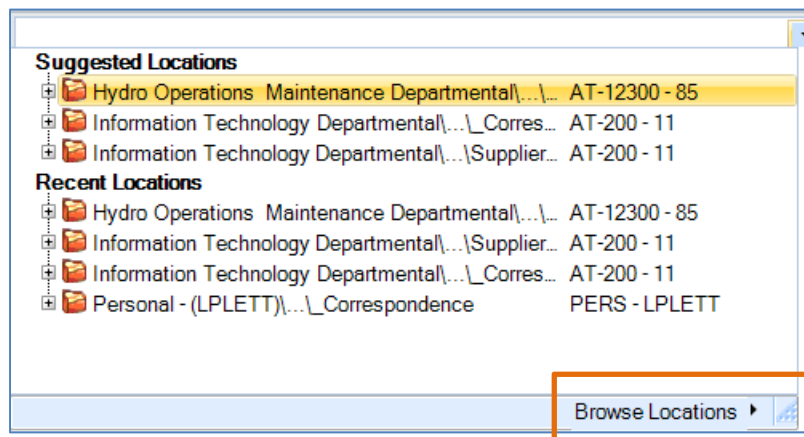
- The subject of the email
- The conversation ID that Outlook applies to messages that are part of the same conversation thread.
- The sender

- Any filing tags appended to the subject of the email.


iManage then ranks the suggested locations and displays them under the **Suggested Locations** list.



- c. Click the **Browse** button in the Suggested Location/Recent Location box to manually select a location from the Worksite Integrated Desktop window.



3. After selecting a destination:

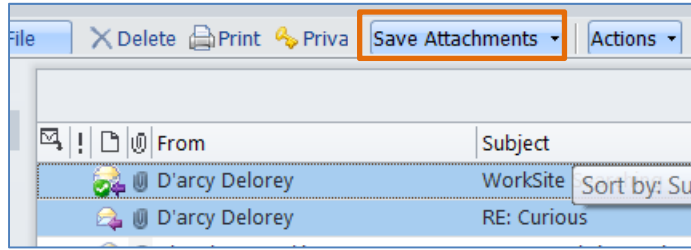
- To file the message, click the **File** button .
- You can use the File button along with the buttons, Delete, Print and Private. For example, to file, print and simultaneously move the message to your Deleted Items folder, click **Print** and **Delete**. Then click **File**.



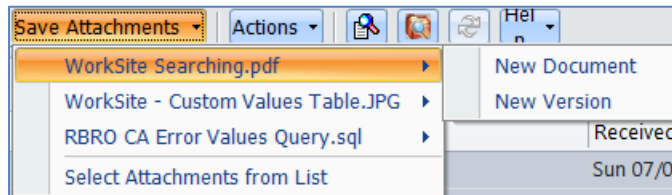
Saving Attachments

You can save up to 14 attachments from emails to iManage at one time. They can be saved as new documents or as new version of existing documents. You can also simultaneously save attachments from separate emails.

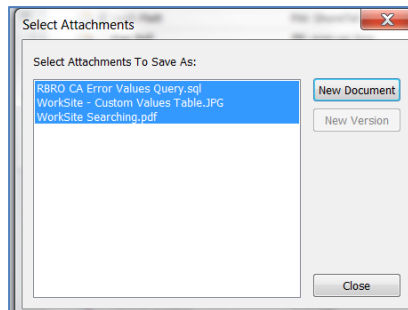
1. Select one or more emails from Outlook.
2. Click the **Save Attachments** button.



3. To save an individual attachment, click the attachment in the list. You will be given the option to save it as a **New Document** or as a **New Version**.



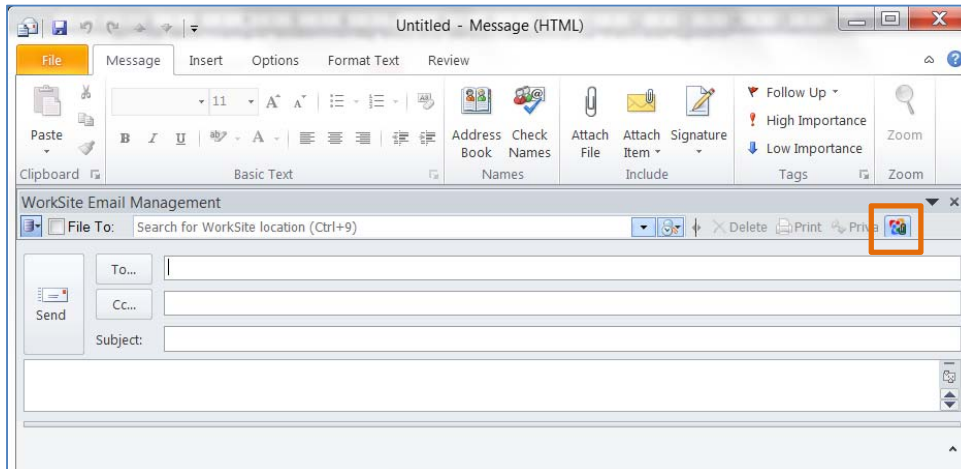
4. If saving as a New Document, select the location from the WorkSite Integrated Desktop window. If saving as a New Version, select the original document from the worksite integrated desktop window, check the profile information and click Save.
5. To save multiple attachments, click the **Select Attachments from List** option.



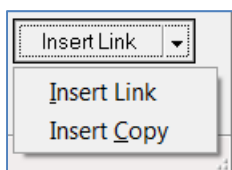
6. Highlight the document(s) you wish to save and once again you can select to save the document as a New Document or as a New Version.

Attaching iManage Documents

You can attach an iManage document to an email by using the Insert Attachment From Worksite button on the message window filing toolbar.



Browse to the document in the worksite integrated desktop window and you can choose to insert a link or a copy of the document. If emailing inside the Corporation it is best practice to email a **link**. If emailing external to the Corporation to recipients with no iManage access, you will need to email a **copy**.

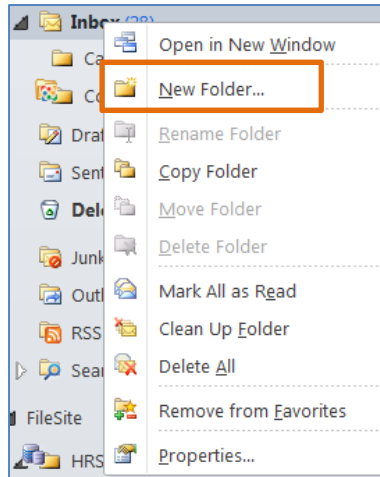


Setting up Filing Folders

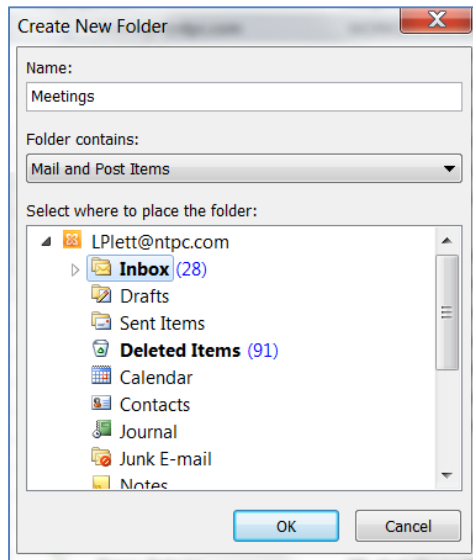
You can link folders in your Outlook mailbox to a corresponding iManage folder so that when messages are added to the Outlook folders, they are copied or moved to the corresponding iManage folder automatically.

Create a new Outlook folder and make it a Filing Folder

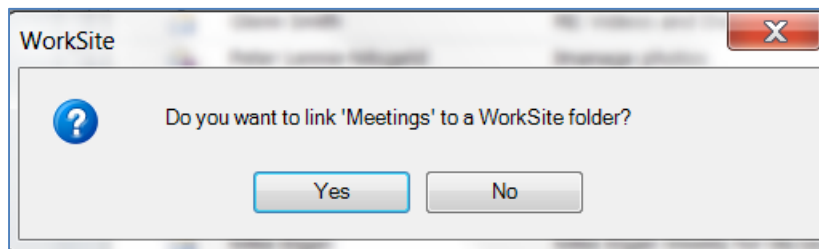
1. Right click your mailbox in the Outlook folder list and choose **New Folder**.



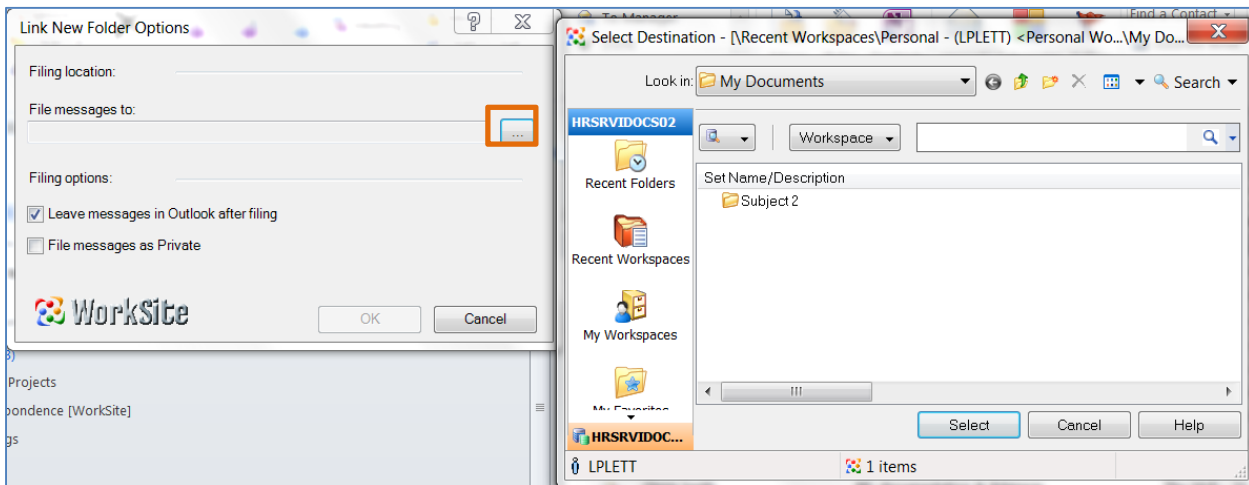
2. Give it a name and select where you would like to located in your Outlook mailbox.



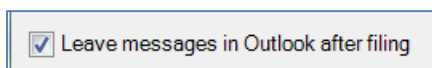
3. When you click OK on the Create New Folder window, you will be prompted if you would like to link this new folder with a WorkSite folder in iManage. Click Yes.



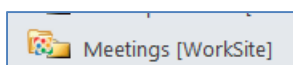
4. Click the Browse button to select a folder from iManage. All emails you put in the folder in Outlook will automatically be filed to this iManage folder.



- By default, the email is filed to iManage and then deleted from your Outlook folder. If you wish to file it and leave it in your Outlook folder, check the “Leave messages in Outlook after filing” checkbox.



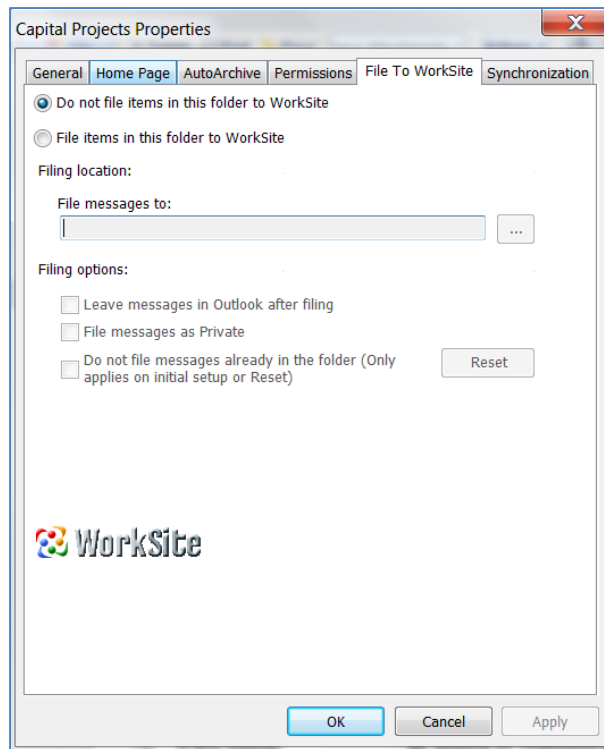
- Click OK. The folder in Outlook is updated with the WorkSite icon and the folder name is appended with the word WorkSite.



Edit an Existing Outlook folder to make it a Filing Folder

To configure an existing Outlook folder as a filing folder:








- Right click on a folder in the Outlook folder list and select Properties. Select the **File to WorkSite** tab.



2. Choose the radial button **File items in this folder to WorkSite**.
3. Click the Browse button to select an iManage folder.
4. By default, the emails put in this Outlook folder will be filed to iManage and then deleted from Outlook. If you wish to leave the email in Outlook, check the **Leave messages in Outlook after filing** option.
5. By default, iManage files all of the existing messages stored in this Outlook folder. To ignore the existing messages and file only new messages added, select the **Do not file messages already in the folder** option.
6. Click OK. The folder in Outlook is updated with the WorkSite icon and the folder name is appended with the word WorkSite.

Using the Action Buttons

The Actions button lets you perform the following actions on emails and documents:

Action button	Action
 Move Email	Will move the highlighted email to the iManage folder selected. Moving an email files the email in iManage and then deletes it from Outlook.
 Copy Email	Will copy the highlighted email to the iManage folder selected. Copying an email files the email in iManage and leaves it in Outlook.
 Move Folder	Move an entire Outlook folder and its contents from the Outlook folder list into iManage. Move will delete the folder and its contents once they are iManaged. You cannot perform this action on the Inbox, Contacts, Calendars, Notes, Tasks or Journal folders.
 Copy Folder	Copy an entire Outlook folder and its contents from the Outlook folder list into iManage. Copy will iManage the folder and its contents and leave them in Outlook after filing.
 Add Documents	Imports existing files on your computer into iManage.
 Properties	Will display the properties dialog box for any iManaged document highlighted in the document grid.
 Where Filed	Will display the filing location for the selected document in the document grid.