

UAB FACILITIES DIVISION STANDARD OFFICE INSTRUCTIONS

HANDLING OF E-MAIL CORRESPONDENCE RELATING TO PROJECTS

PURPOSE:

To create a standard operating procedure for the handling of important electronic exchange between parties regarding construction and renovation projects in order that the information can be permanently retained and retrievable.

GENERAL REQUIREMENTS:

Since 2001, Project Managers have been required to file their e-mails from the Exchange server to Processed Mail folders on their local hard drive. Beginning February 1, 2007, the MS staff will help users create a backup job that will backup all of a user's e-mails from the user's local hard drive to a secure location on a server that will then be backed up nightly by Information Management Systems.

PROCEDURES:

- 1.0 At the inception of a project, the assigned Project Manager shall create a separate ".pst" file for each such project. For each project spanning more than one year, a separate ".pst" file shall be created annually, so as to limit the size of the ".pst" file, and improve the probability that the file containing the e-mails will not become corrupt.
- 2.0 All project related e-mails shall be moved from the inbox or sent box on the Exchange Mail Server to a properly named .pst file on the user's local hard drive. This preserves the available space on the Facilities mail server and enhances performance of the e-mail system for all users.
- 3.0 At intervals of at least every two weeks, the Project Manager shall close Outlook which will then backup all .pst files to the server using the schedule job which the IMS staff will help the user set up.
- 4.0 At project close out, the Project Manager shall make the last backup of the project's current year .pst file.
 - 4.1 Also at project close out and after step 4.0, the assigned Project Manager shall request that Information Management Systems make two copies on CD or DVD media of project e-mails (all years) from the server and remove the project's e-mails from the server. Note that there will be other copies of the e-mails in the IMS weekly backups. One copy of the disk(s) is to be returned to the assigned Project Manager for proper storage with the project records (Central File) for archival purposes and one is to be held by IMS for quick mounting on a server, in the event that project personnel need to research any project issues in the e-mail records. The DPMS Project Manager may keep his copy of project e-mails on his local drive for as long as he wishes or until he needs the disk space for active projects.

(END OF PROCEDURE)