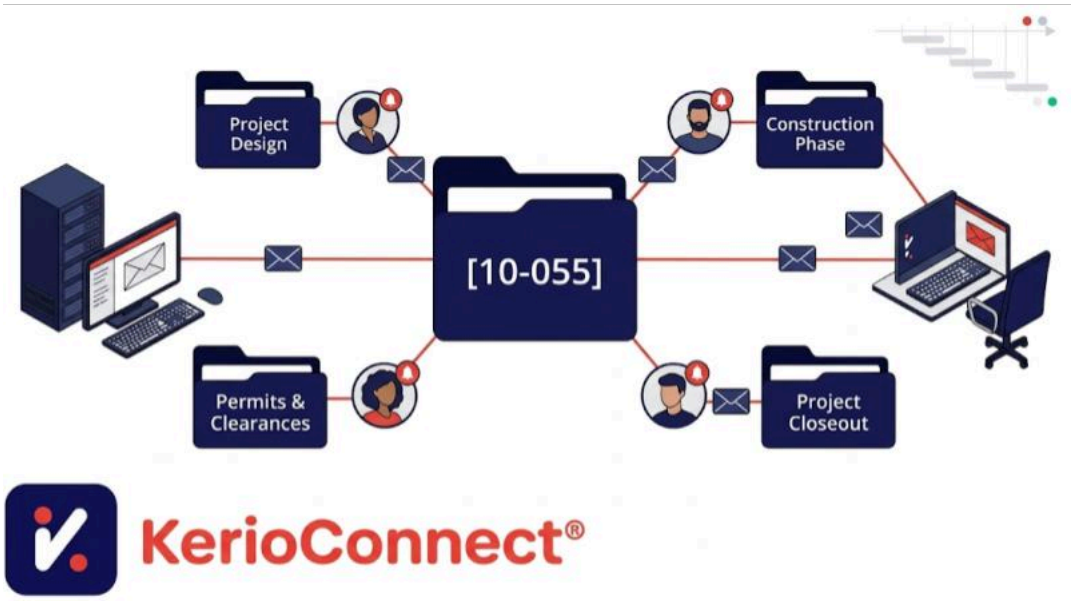
KerioConnect®

USE CASE

Project Email Organization Workflows

Practical setup for AEC, Legal, Consulting, and other project-based teams



If your team works on multi-year projects with multiple stakeholders, you've experienced these problems:

- **"Where's that approval email from 2022?"** → Searching across 12 individual mailboxes
- **"Sarah left the company"** → Lost access to critical project correspondence
- **"New hire needs project context"** → Manually forwarding hundreds of emails
- **"Client wants complete project record"** → Exporting from fragmented locations

GFI KerioConnect®'s integrated features, including shared folders, routing rules, permissions, and calendars, ensure project email organizes itself and supports long term projects.

The GFI KerioConnect® approach

Shared folders are not special by themselves. The value comes from orchestrating features into a repeatable workflow:

- **Public Folders =** shared project filing structure (by project number / matter / engagement)
- **Permissions =** only the right people can read/write the right subfolders
- **Mail rules (routing/copy rules) =** project mail auto-files where it belongs
- **Shared calendars/contacts =** project milestones and stakeholders stay with the team
- **Multiple access options =** Outlook (recommended on Windows via KOFF), Webmail, IMAP, and mobile

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Workflow #1 New project kickoff (15–20 minutes)

Step 1 — Create a standard folder tree (template)

```
Public Folders
└─ Active Projects
   └─ [10-055] Downtown Office Tower
      ├─ 01 - Design (Approvals, Coordination)
      ├─ 02 - Permits & Authorities
      ├─ 03 - Construction (RFIs, Submittals, Change Orders)
      └─ 04 - Closeout
```

Tip: Keep names short for mobile visibility and cleaner Outlook navigation.

Step 2 — Apply a simple permissions model

Folder	Project Team	External Consultant	Client
Project Root	Read/write	Read (optional)	None (usually)
Approvals	Read/write	None	Read/write (if needed)
RFIs	Read/write	Read	None

This prevents “everyone sees everything” while keeping the full record centralized.

Step 3 — Add auto-filing rules (so the system does the work)

Start simple and refine after 1–2 weeks.

- **Rule A:** Project tag in subject
  - → **Condition:** Subject contains `[10-055]` (or your project code)
  - → **Action:** Copy to `Active Projects/[10-055] Downtown Office Tower`
- **Rule B:** Contractor domain → Construction
  - → **Condition:** From contains `@generalcontractor.com`
  - → **Action:** Copy to `03 - Construction`
- **Rule C:** Approvals keyword → Approvals
  - → **Condition:** Subject contains “approved” OR “approval”
  - → **Action:** Copy to `01 - Design/Approvals` (+ optionally notify PM)

Step 4 — Add a shared project calendar (optional but high value)

Create: “**[10-055] Milestones**”

- → **Team:** edit
- → **Consultants:** read-only

Keeps deadlines and reviews visible without hunting through email threads.

Workflow #2 Daily use (what changes for users)

Project teams keep their inbox, but key correspondence is also copied into the project folder automatically.

1. PM needs an old RFI thread → open the project folder → search there
2. New engineer joins → grant access → they immediately see the full history
3. Everyone files less manually because rules do first-pass organization

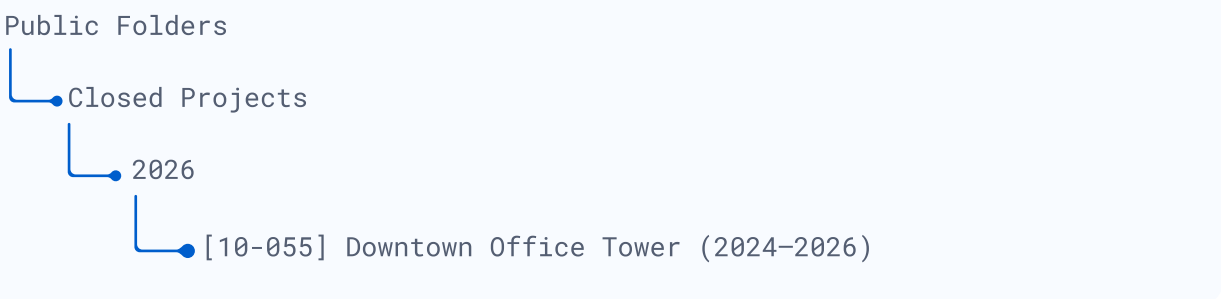
Outlook note:

- On Windows, KOFF is the recommended Outlook experience for heavy Outlook users because it exposes Public Folders natively inside Outlook and supports cached/offline behavior (configured by policy).
- The same folders are also accessible via Webmail (cross-platform) and supported clients via standard protocols.

Workflow #3 Project closeout & handover (5–10 minutes)

When a project ends:

1. **Move it to an archive area:**



2. **Change permissions**
   - Most users: read-only
   - PM/ops: keep write access for final documentation
3. **Export when needed**
   - Export the project folder/subfolders for client handover or internal review (keeps structure intact)

Where GFI Archiver AI fits

This one-pager focuses on active project workflow (day-to-day access and collaboration).

GFI Archiver AI complements with a compliance/archive layer, such as:

- immutable retention policies
- legal hold / investigation workflows
- centralized search across multiple sources/systems

GFI KerioConnect® = working project email structure.
GFI Archiver AI = independent retention & discovery layer.

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