

Losing our Memory

A couple of decades ago, we all closed out a project by reviewing all the paper documents associated with it, throwing out the extraneous stuff, packing the rest in a file box or cabinet (sometimes along with a current copy of building codes and ordinances), and dropping it off in dead storage.

Things are much more complex now. The life of a project is now no longer in a single medium like paper. We have faxes, phone calls, e-mail, CAD documents, word processing, spreadsheets and databases. What can we expect when we attempt to resurrect all this information years from now when we need to make changes to a structure or reconstruct information to support a legal position?

Later in the life of a project, it's sometimes difficult to figure out the rationale for early decisions made just months ago.

Last month, we reviewed the difficulties of maintaining project knowledge generated by CAD and Office Productivity applications. This month, we consider the difficulties of integrating all the information flowing in from the other common sources: fax, phone and email.

Faxes, Phone Calls and E-mail

How do you document the information that flows outside of your project directory? To maintain a record of extemporaneous information, I like to write a short telephone memo (or meeting minutes) after each important phone call - just like most of us do for formal meeting minutes. After all, a telephone call is just a meeting. That written record can then be saved in the project directory for the record, and even e-mailed to others to maintain clear communications.

E-mail: E-mail is a difficult thing to keep track of. Most people treat their mailboxes as a private stash of personal notes rather than as a source of company knowledge. Most E-mail servers allow the creation of shared folders. Shared folders should be created for each project and shared between all project team members. Each team member should occasionally take a moment to drag any project-specific e-mail into that shared folder. This allows the whole team to share project knowledge, and makes knowledge transfer to new team members easier.

Unfortunately, most E-mail servers are not designed as knowledge repositories but rather as small, temporary data bins. Administrators usually create a maximum e-mail folder file size for users forcing them to constantly remove information from their mailboxes in order to conserve disk space and speed up the e-mail software. Make sure that maximum is generous enough to maintain all important project data for the life of the project. At the conclusion of each project, it is possible with many e-mail clients (such as Microsoft Outlook) to drag the contents of the e-mail project folder to a project subdirectory. You can then keep all the project information together in a searchable folder - even if you ultimately archive the project to tape or CD.

Many E-mail clients allow the creation of 'rules', which redirect a message based upon its contents. For example, incoming messages from a certain e-mail address can be moved or copied to a shared folder, or those with a project name in the subject line can be forwarded to the project manager. Open standards for automation of e-mail clients allow much greater customization of rules and better integration with Knowledge Management tools, but so far those tools are too imprecise to depend on. It remains a mostly manual drag and drop operation to organize important e-mail

Faxes: Important incoming faxes are another aspect of project information that must be archived. There are two good solutions for this. The first is to use a fax modem and computer for all incoming faxes. Support staff can review the cover page of each incoming fax on-screen, and forward it to the intended recipient via e-mail. As a result it becomes e-mail information stored in a public project folder

and is managed with the other e-mail for the project. In this case, you should also have a shared fax-modem on the network for outgoing faxes generated electronically.

Another approach is to have individual fax numbers for each Project Manager for automatic forwarding to their e-mail address. In-house systems like this have been prohibitively expensive, but there are now several services which provide this service with no in-house hardware at all! Pricing is about \$6 to \$11 per month for each fax number.

In both these cases, you will need to retain a traditional fax machine for sending outgoing faxes from hand sketches and catalog cuts.

Legalities

Many attorneys have read of people being burned by their own e-mail archives (proving the claims of others) and consider keeping email as bad an idea as recording the Nixon tapes. They recommend you permanently dispose of all e-mail over 90 days old to protect you from poorly considered correspondence.

I feel that all project-specific information should be generated and reviewed by the same people responsible for the written correspondence - and that they put the same attention and care into electronic correspondence as they put into the paper kind. If your office has generated correspondence that is embarrassing or opens you to liability, the time to stop it is before it is sent. Your electronic project documents are at least as important as your written correspondence and your firm should take responsibility for it. Personal email messages are a separate issue and are outside the scope of this article.

How do you consolidate these disparate project information sources in your firm? E-mail me to share your story.

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