

EMCAP Pilot User Guide For Novell GroupWise

North Carolina Department of Cultural Resources
Government Records Branch
E-mail Collection and Preservation Tool Grant
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Part 1: Set-up

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Introduction

Thank you for your participation in the pilot project for the e-mail archiving EMCAP (E-mail Collection and Preservation) tool. This tool can be used within GroupWise to collect messages that the user has organized and designated to be archived based on the messages' content, using his or her agency's records retention and disposition schedule to identify what messages should be permanently retained. The EMCAP archival folder appears as an addition to the GroupWise cabinet and inbox that can for the most part be treated just like another folder in which to store messages.

This guide consists of two parts. Part One, this document, explains how to make administrative changes for the tool. Part Two provides steps for moving e-mails within GroupWise and is listed as a separate document on the training page (<http://www.ah.dcr.state.nc.us/records/EmailPreservation/training>). Since this is a pilot project, some aspects may be a bit different than if EMCAP is implemented as a permanent e-mail archiving tool. These disparities are identified throughout this manual.

Information about the grant project through which the e-mail archiving tool was developed can be found here: <http://www.ah.dcr.state.nc.us/records/EmailPreservation/>.

EMCAP Set-up

The EMCAP server stores all e-mail designated as archival; this means any messages of permanent value should be archived using EMCAP. Your agency's IT staff will configure the EMCAP account on each user's computer. Since the tool works like an e-mail account, each participating agency will have a domain name assigned to it to use the tool. A typical user account will look something like this:

Office of the Secretary of State: your.name@sos.emcap.ncdcr.gov or

State Emergency Response Team: your.name@sert.emcap.ncdcr.gov

Creating your password

When your EMCAP account is created, you will receive an e-mail with information including your EMCAP e-mail address, a link to this and other training material, and a link to follow to create a password (figure 1). You must create a password within 48 hours of receiving the e-mail in order to activate your EMCAP account.

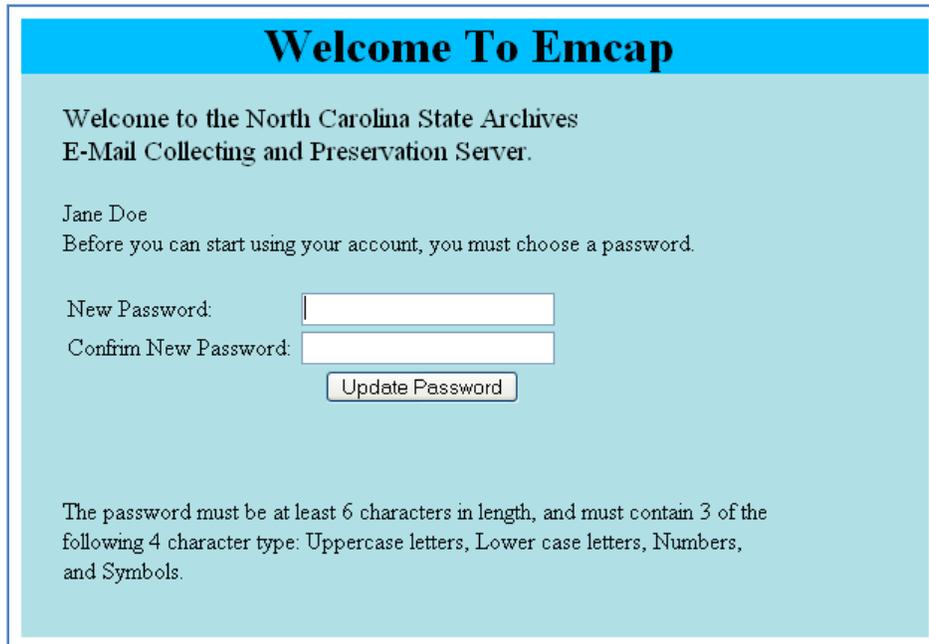


Figure 1. Change password.

The welcome screen will instruct you to enter a new password and then confirm that password by typing it again. Select **Update Password** to complete the change. This password, once created, must then be entered in GroupWise to log in to the EMCAP account. The steps to do so are next.

GroupWise Set-up

Your agency's IT department will set up the EMCAP tool in your GroupWise client so that it looks like any other folder (figure 2). This means that archiving your e-mail is similar to moving messages to a cabinet folder. However, because this is a pilot, users should always keep a copy of any moved message off of the EMCAP server, either in the GroupWise e-mail account, or on the desktop or network. Due to the inability to copy messages to EMCAP in GroupWise, this requires an extra step in the archiving process. This will be further explained in part two of this user guide.

Updating your password in GroupWise

To complete the set-up, you must now enter the password that you just created for your EMCAP account in GroupWise.

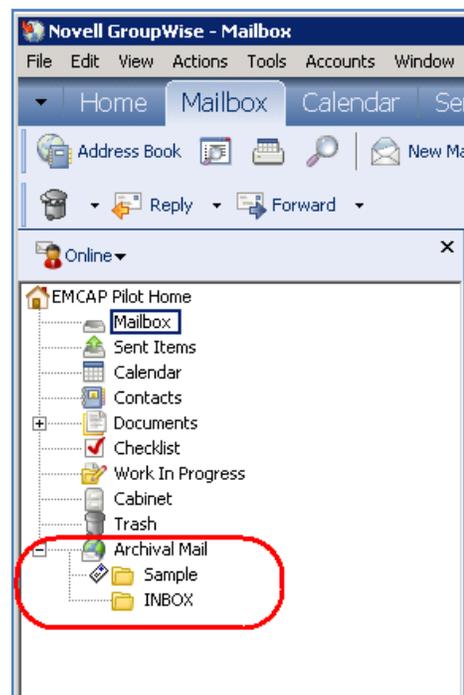


Figure 2. GroupWise folder structure with EMCAP.

1. Open GroupWise.
2. Once in GroupWise, highlight the **Archival Mail** account by clicking on it once (see the arrow in figure 3).
3. Select **File** from the toolbar to see the drop-down menu.
4. From the drop-down menu, select **Properties** (figure 3). A window will open that displays information about the EMCAP Archival Mail account.
5. Move to the **Server** tab at the top of the window to see the Login name and a place for your new password (figure 4).

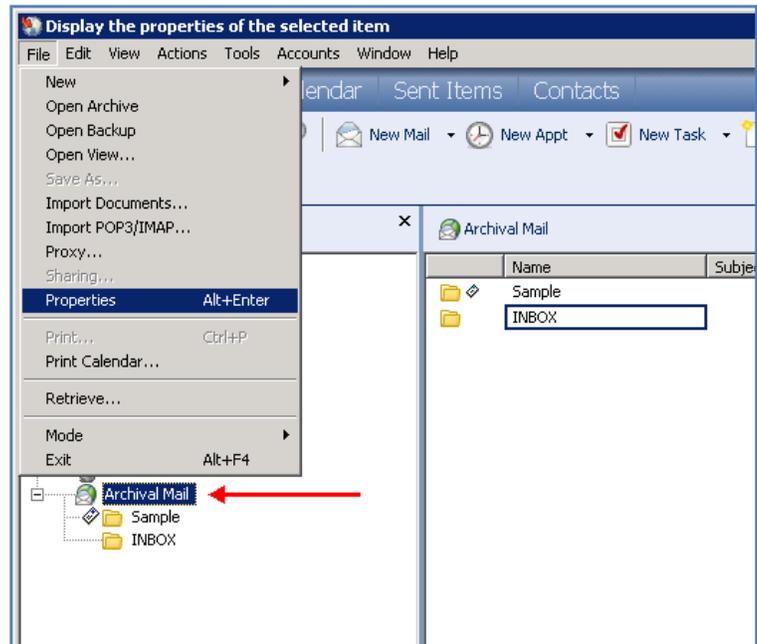


Figure 3. Change Archival Mail properties.

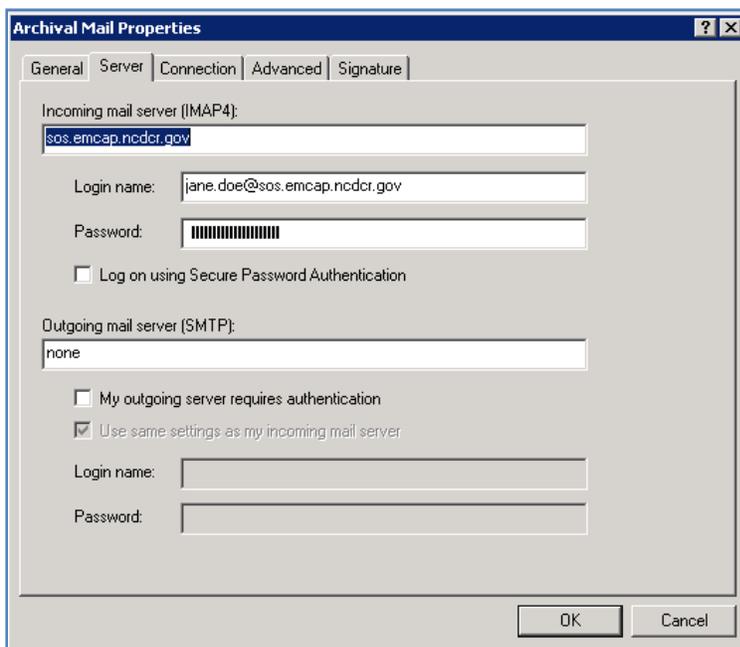


Figure 4. EMCAP Archival Mail properties.

6. Enter the password that you created for EMCAP here. Press **OK**.
7. Click **Next** to advance through the windows, and then **Finish**.

Creating folders for your EMCAP archive

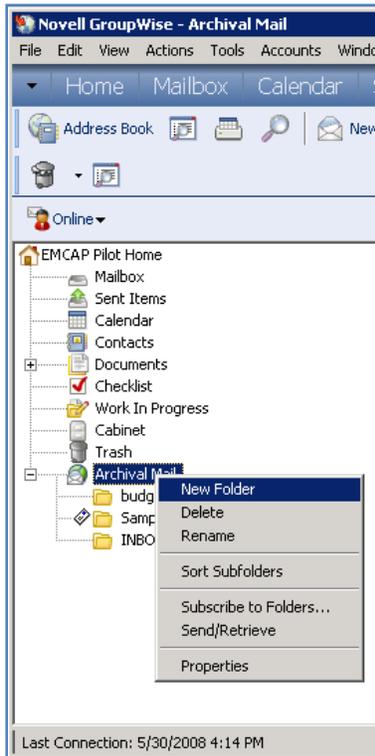


Figure 5. Adding a folder, option 1.

To keep your EMCAP archive messages organized, create folders based on the folders in your regular e-mail account in order to keep related messages together, taking into consideration your retention and disposition schedule. There are two ways to create a new folder.

1. Right-click on **Archival Mail**, your EMCAP account, in GroupWise (figure 5).

OR

2. Select **Edit** from the toolbar; from the drop-down menu select **Folders** (figure 6).

From either of these options select **New Folder**.

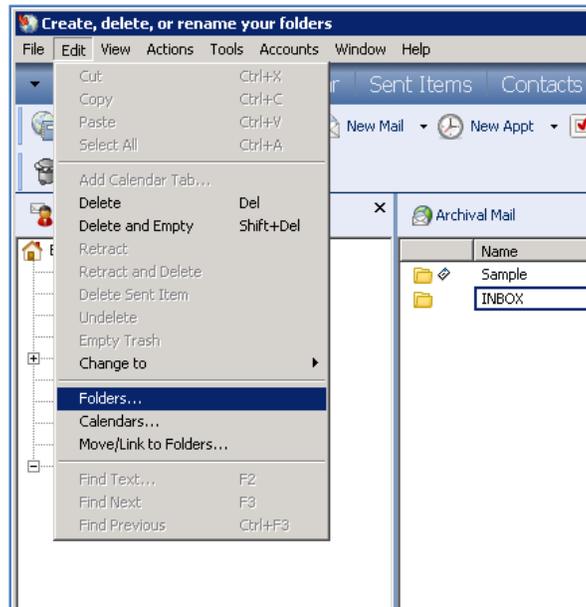


Figure 6. Adding a folder, option 2.

A new window will open (figure 7). Select the location for the new folder; make sure it will be nested correctly by selecting **Archival Mail**. Click **OK**.

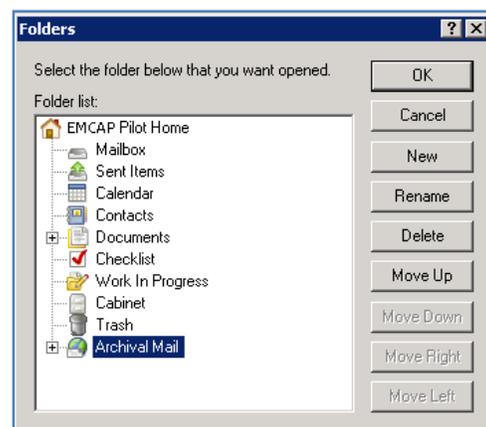


Figure 7. Select Archival Mail.

Another window will open (figure 8). Select **Personal folder** for the kind of folder to create. Leave everything else as it is and select **Next**. Another window will appear with additional settings. Do not change anything and select **Next**.

In the next window (figure 9), enter the name of the folder. In this example the folder name is *budget*. You will see the new folder appear under Archival Mail in the Position section of the window. Select **Next**.

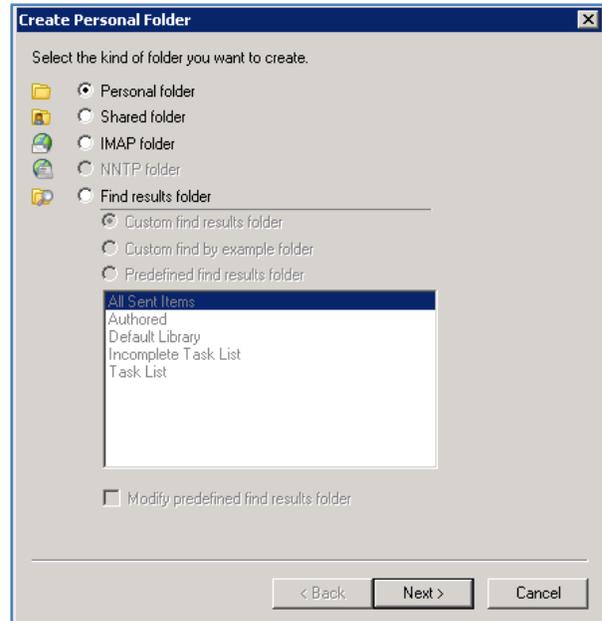


Figure 8. Create Personal Folder, type.

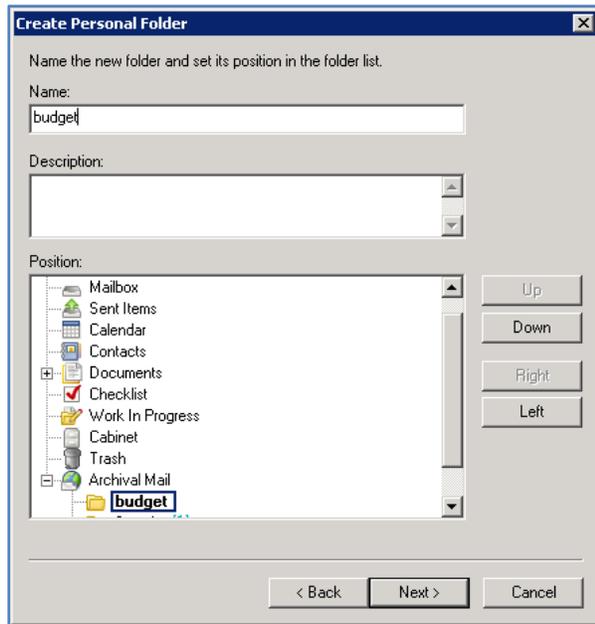


Figure 9. Create Personal Folder, naming.

The folder will now appear within your Archival Mail account. (See figure 10.) If the folder is not placed in the EMCAP Archival Mail account as shown, mail in that folder will not be archived by EMCAP.

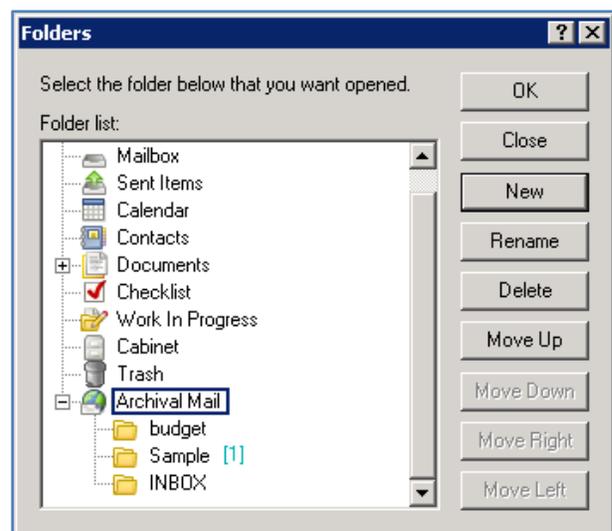


Figure 10. New folder.

Managing Your EMCAP Account

Once you create your password, you can then access the EMCAP Account Status page where you can manage your account. The site is: <https://ncarchives.dcr.state.nc.us/emcap>. (See figure 11.)

The screenshot shows the login page for the EMCAP Account Status. At the top, there is a blue header with the text "Emcap Account Status" and "Login Page" below it. The main content area is light blue and contains the following text: "North Carolina State Archives", "E-mail Collection and Preservation Server", "Please login.", and "Enter either your archival account address or your regular account address." Below this are three input fields: "Archival E-mail address", "Regular E-mail address", and "Archival account password*", each with a corresponding text box. A "Login" button is positioned below the input fields. A link that says "Click here if you have forgotten your password." is located below the login button. At the bottom, there is a note: "*The password used to access your archival account is required here whether you supply your archival e-mail address or your regular e-mail address".

Figure 11. EMCAP Account Status Login Page.

To log in, you must provide your archival e-mail address or your regular e-mail address. The Account Status site provides information about how much e-mail you have moved to your EMCAP account, the regular e-mail address associated with the account, and the unit in which you work. You can modify the associated e-mail address (your normal work e-mail address) and unit name (the unit in which you work). (See figure 12.)

The screenshot shows the account status page for the EMCAP Account Status. At the top, there is a blue header with the text "Emcap Account Status". The main content area is light blue and contains the following text: "North Carolina State Archives", "E-mail Collection and Preservation Server", "Account Status for: Megan Durden", and a "Change Password" button. Below this are two input fields: "Contact e-mail address: megan.durden@ncmail.net" and "Unit Name: Government Records Branch", each with a "Save" button. Below the input fields, there is a section for account statistics: "Last Archival Collection: Never", "Messages Archived: 0", and "File Space: 0". Below this are two labels: "Date of Earliest Message:" and "Date of Latest Message:". At the bottom, there is a section for account details: "Archival Account Address: megan.durden@dcr-sv3em.dcrdmz.local" and "Created: Tuesday, April 08, 2008", with a "Log Off" button.

Figure 12. EMCAP Account Status Page.