EMCAP Pilot User Guide
For Microsoft Outlook 2003

Kentucky Department for Libraries and Archives
Public Records Division
E-mail Collection and Preservation Tool Grant
May 2008

Part 1: Set-up

Contents

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 Microsoft Outlook 2003 (as well as Out look 2007) to collect messages that the user has organized and designated to be archived based on the messages' content, using his or her agency's retention schedule to identify what messages should be permanently retained. EMCAP appears as an additional e-mail account in Outlook that can be treated just like another folder in which to store messages.

This manual explains how to make administrative changes for the tool as well as how to archive e-mails using the tool within Outlook. Since this is a pilot project, some aspects may be a bit different than when EMCAP is implemented as a permanent e-mail archiving tool. These disparities will be identified throughout this manual.

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

Why the EMCAP Archive Folder is Different than Outlook's Archive Folder

You might notice in that **Archive Folders** already exist in your Outlook folder list. (See figure 11 for an example.) This is because Outlook uses the term "archive" to describe how it efficiently stores e-mail messages for your Outlook client. When Outlook asks to "auto-archive" your messages, or when you create your own archive settings, Outlook moves older messages to a different storage unit to more easily access the messages that are more current.

Keep in mind that your auto-archive settings do NOT affect how you should retain your messages per your agency's retention schedule. You should copy permanent records found in your e-mail to the EMCAP Archive folder regardless of whether they are currently located in your Personal Folders or in your Archived Folders.

EMCAP Set-up

The EMCAP server stores all of the e-mail designated as archival. The account information for each agency's users is created by that agency's IT staff. 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@ky.gov or

Office of the Governor: your.name@ky.gov

Once a user name and password is created, the user can manage his or her account from this site: https://dlaearchive/emcap

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.

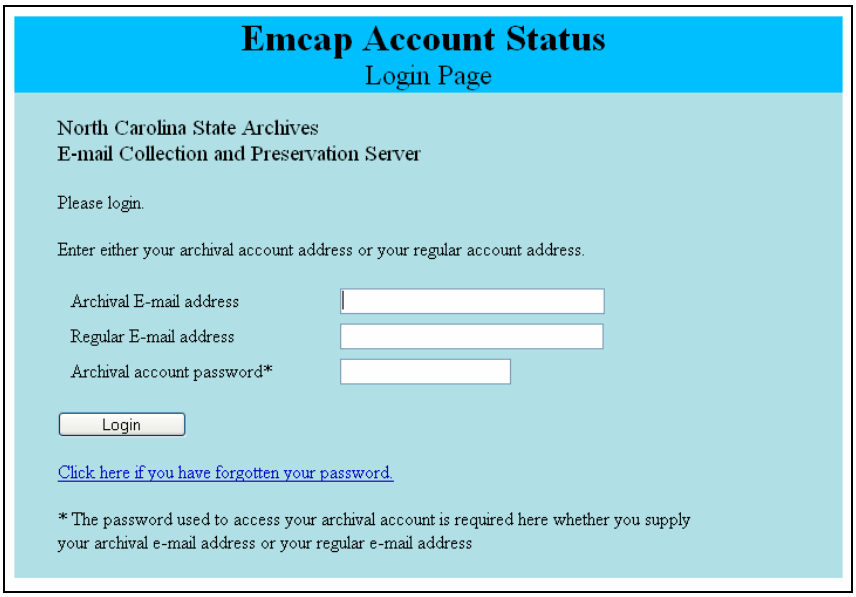


Figure 1. EMCAP Account Status Log-in Screen

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 Outlook to log in to the EMCAP account. The steps to do so are next.

Log in to view EMCAP account status

- To log in, you must provide your archival e-mail address or your regular e-mail address.
- KDLA IT will also have provided you with a temporary account password. You will be required to change it here before the EMCAP account is activated. Steps to change your password can be found on the following page.
- This site also 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 and unit name here. (See figure 2.)

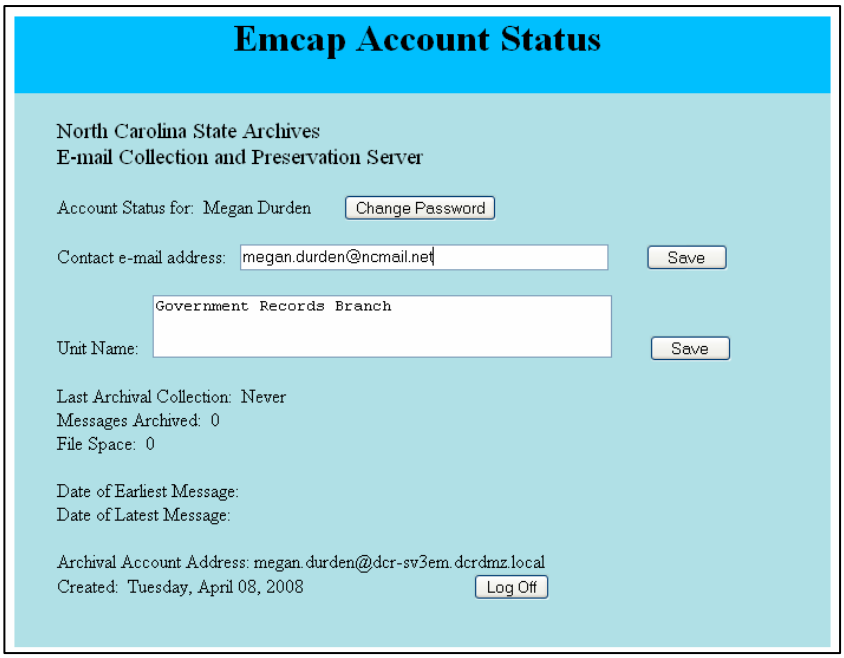


Figure 2. EMCAP Account Status Page

Outlook Set-up

IT will have set up the EMCAP tool in your Outlook client so that it looks like another e-mail account folder (figure 3). This means that archiving your e-mail is just like moving messages between folders.

Changing your EMCAP account password

When you change your password, you will need to change it in two places. First, log in to your account at https://dlaearchive/emcap. (See figure 1.) On the Account Status page (figure 2), click **Change Password.**

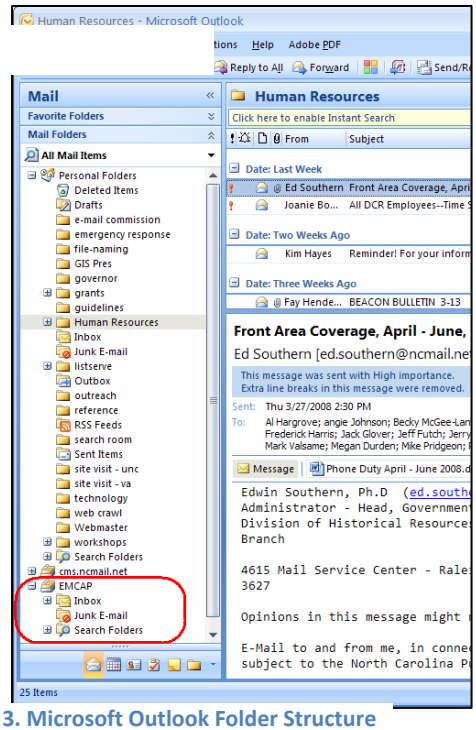


Figure 3. Microsoft Outlook Folder Structure with EMCAP

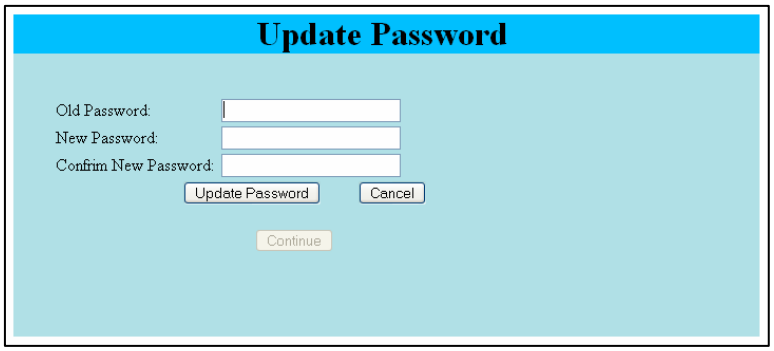


Figure 4. Update Password Page

The Update Password page (figure 4) will prompt the user to enter his or her old password, new password, and then confirm the new password by typing it again. Select **Update Password** to make the change. **Log out** of the Account Status page and close the browser window. Open Microsoft Outlook

.

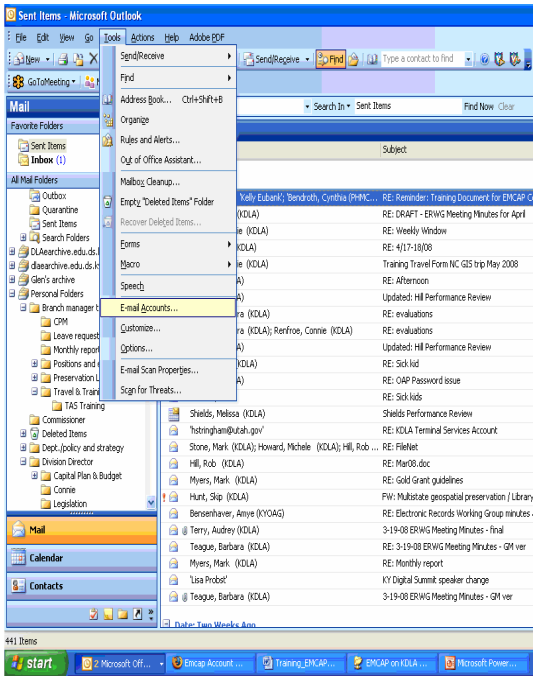


Figure 5. Change Account Settings

Once in Outlook, select **Tools** from the ribbon to see the drop-down menu. From the drop-down menu, select **Email Accounts** (figure 5). A window will open that displays the e-mail accounts associated with Outlook.

Note the EMCAP account listed below in figure 6:

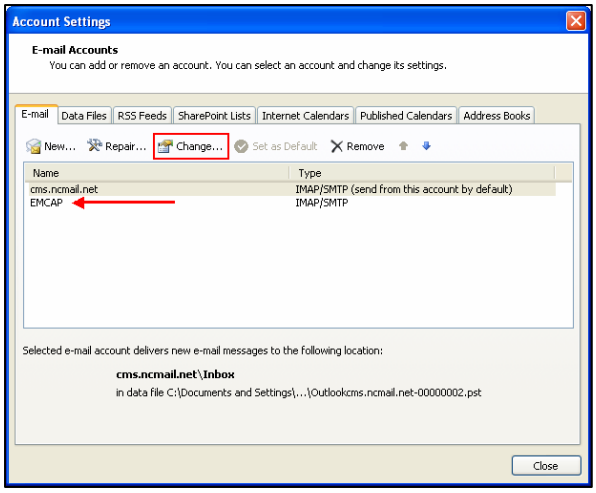


Figure 6. EMCAP Account in Account Settings

To view the details of the EMCAP account, select **Change** to open another window (figure 6). You can see the user name, EMCAP e-mail address, and see that the password is remembered for this account (figure 7). Enter the new password you just created in the Password field. Leave **Remember password** checked. Click **Next** to advance through the windows, and then **Finish**.

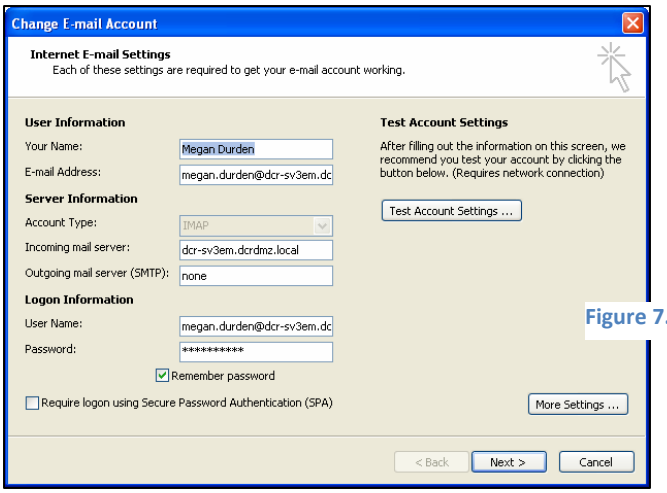


Figure 7. Change E-mail Account.

Creating folders for your EMCAP archive

To keep your EMCAP archive messages organized, you should create folders based on the folders in your regular e-mail account in order to keep related messages together. There are two ways to create a new folder.

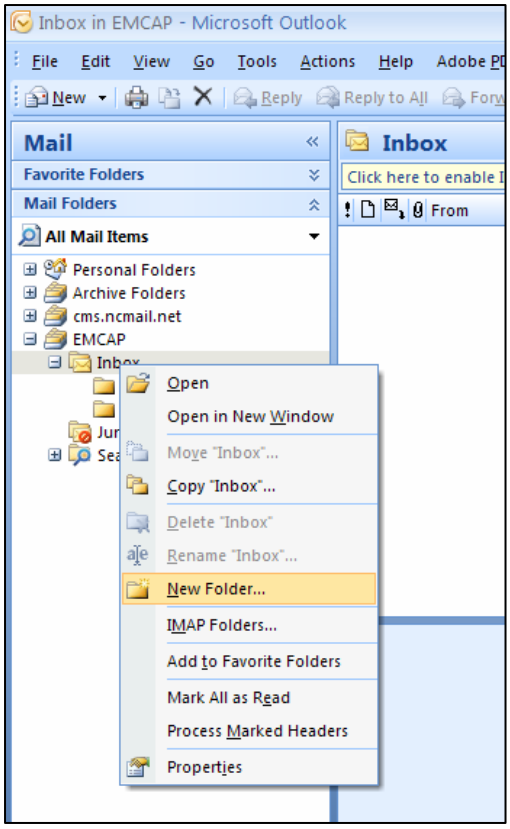
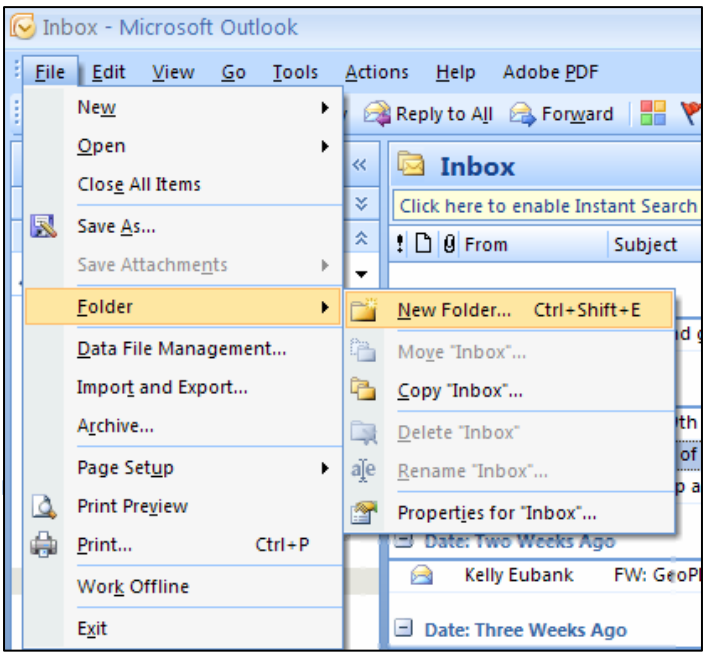


Figure 8. Create a new folder.

1. Right-Click on **Inbox** in your EMCAP account in Outlook and select New folder from the pull-down menu that appears (figure 8). OR

2) **Select File** from the ribbon; from the drop-down menu select **Folder**, then **New Folder** (figure 9).



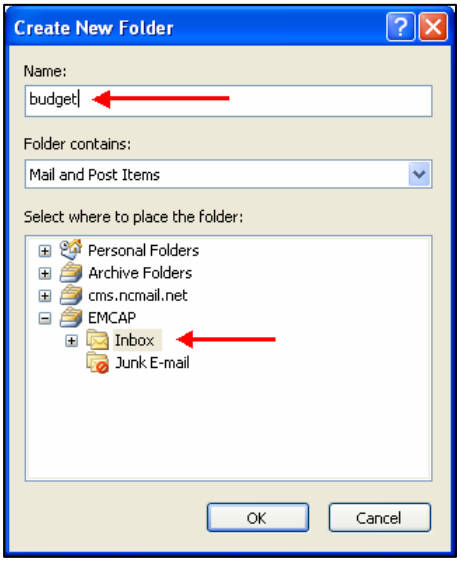


Figure 10. Create a new folder.

From here, the same window opens (figure 10). Enter the name of the folder – in this example it is "budget" – and make sure it will be nested in your EMCAP inbox by selecting where to place the folder. Click **OK**.

The folder will now appear nested below your EMCAP Inbox. (See figure 11.) If the folder is not placed in the EMCAP account as shown, mail in that folder will not be archived by EMCAP.

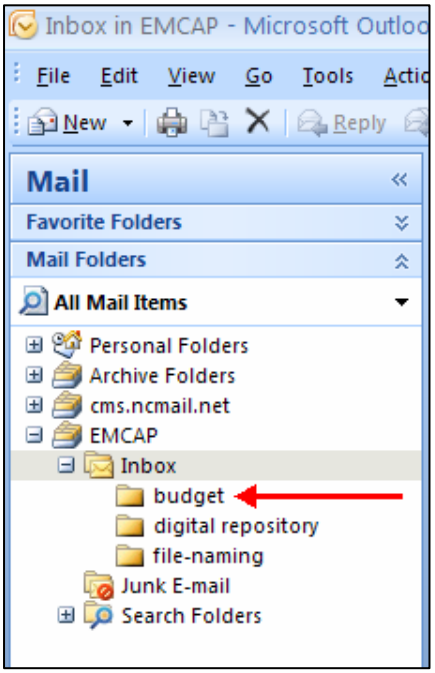


Figure 11. The newly-created folder.