

EMCAP Pilot User Guide
For Microsoft Outlook 2007

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 EMCAP (E-mail Collection and Preservation) pilot project. You have been selected to collect e-mail messages that you have organized and designated to be archived based on the messages' content, and by using your agency's records retention and disposition schedule to identify which e-mail messages should be permanently retained.

As a user of EMCAP, you have access to an account on an archival e-mail server dedicated to collecting and storing archival e-mail messages that have lasting historical value because they document or constitute evidence of state policies, decisions, procedures and essential transactions. This archival e-mail account appears as an additional folder in your Microsoft Outlook 2007 sidebar, and is treated just like another folder in which to move and store archival e-mail messages. In addition to the archival e-mail account, you can also check on the status of your archival e-mail messages and make basic changes to your account via the EMCAP Status Account module.

This guide consists of two parts. Part One, this document, explains how to set up EMCAP and make administrative changes to the Status Account tool. Part Two provides steps for moving e-mail messages within Outlook and is listed as a separate document on the training page at <http://www.records.ncdcr.gov/EmailPreservation/training.htm> . Since this is a pilot project, some aspects may be different than if EMCAP is implemented as a permanent e-mail archiving tool.

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/>.

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

You may notice that an Archive Folders folder already exists in Outlook's default sidebar. This is because Outlook uses the term "archive" to describe the way it efficiently moves and stores e-mail messages that you haven't used in a long time. When Outlook asks to "auto-archive" your older e-mail messages, or when you create your own archive settings, Outlook moves older e-mail messages to a different location to more easily access the messages that are current.

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

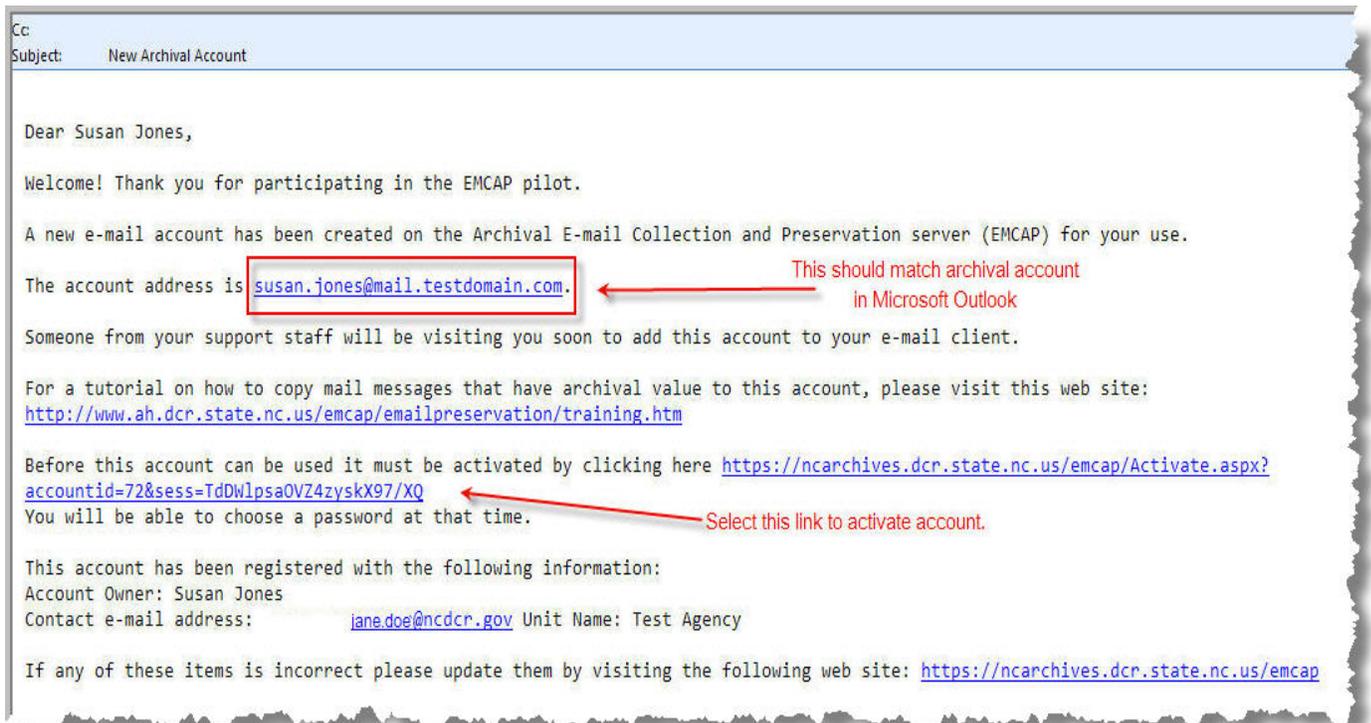
EMCAP Set-up

In order to have access to the EMCAP archival server, you agency's IT staff will need to configure the e-mail client software on your computer. Each participating agency will have a domain name assigned to it to use the tool. A domain name is an organized collection of records (or users) that are associated with one another. For example, the users listed under the domain name "Secretary of State" are all affiliated with this specific agency. Consequently, a typical user account for someone working for the Office of the Secretary of State will look something like this:

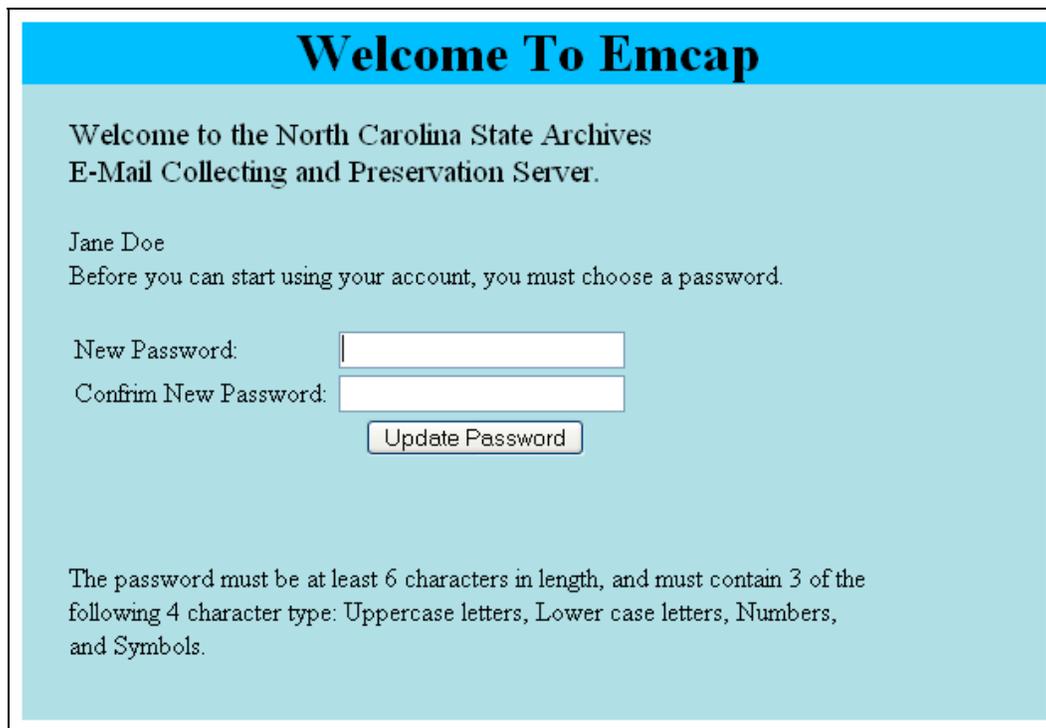
your.name@sos.emcap.ncdcr.gov (where "sos" after the "@" symbol is the domain name for Office of the Secretary of State).

Creating Your Password

Once your EMCAP account is created on the archival server, you will receive a welcome e-mail message. The message contains your EMCAP e-mail address (which will be identical to the archival account in Microsoft Outlook), a link other training material, and a link to activate the account before it can be used.



Click on the link to activate your account. A Welcome to Emcap screen will appear (Figure 1).



The screenshot shows a web interface with a blue header bar containing the text "Welcome To Emcap" in bold black font. Below the header, the text reads "Welcome to the North Carolina State Archives E-Mail Collecting and Preservation Server." followed by "Jane Doe" and "Before you can start using your account, you must choose a password." There are two input fields: "New Password:" and "Confirm New Password:". Below these fields is a button labeled "Update Password". At the bottom of the form, there is a paragraph of text: "The password must be at least 6 characters in length, and must contain 3 of the following 4 character type: Uppercase letters, Lower case letters, Numbers, and Symbols."

Figure 1. Choose a password

The welcome screen will instruct you to enter a new password and then confirm that password by typing it again. Please note that the password must be at least 6 characters in length, and must contain 3 of the 4 character types: uppercase letters, lowercase letters, numbers and symbols. *Make note of this password as you will need it later.* Select **Update Password** to complete the change. This password, once created, must then be entered in Outlook to enable you to log into the EMCAP account. The steps to do so are next.

Note: You *must* create a password within 48 hours of receiving the welcome e-mail message in order to activate your EMCAP account. If you do not, the account activation request will expire and you will be asked to submit a new request.

Outlook Set-up

Updating Your Password in Outlook

Your agency's IT department will then set up the EMCAP account in your Outlook client so that it looks like another e-mail account folder (Figure 2).

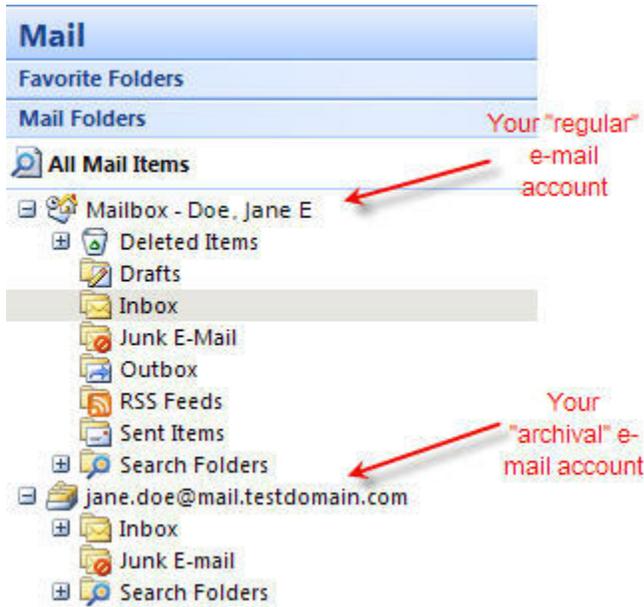
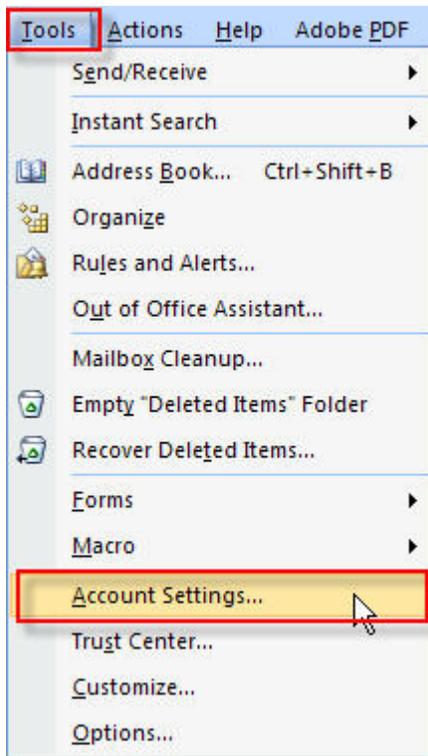
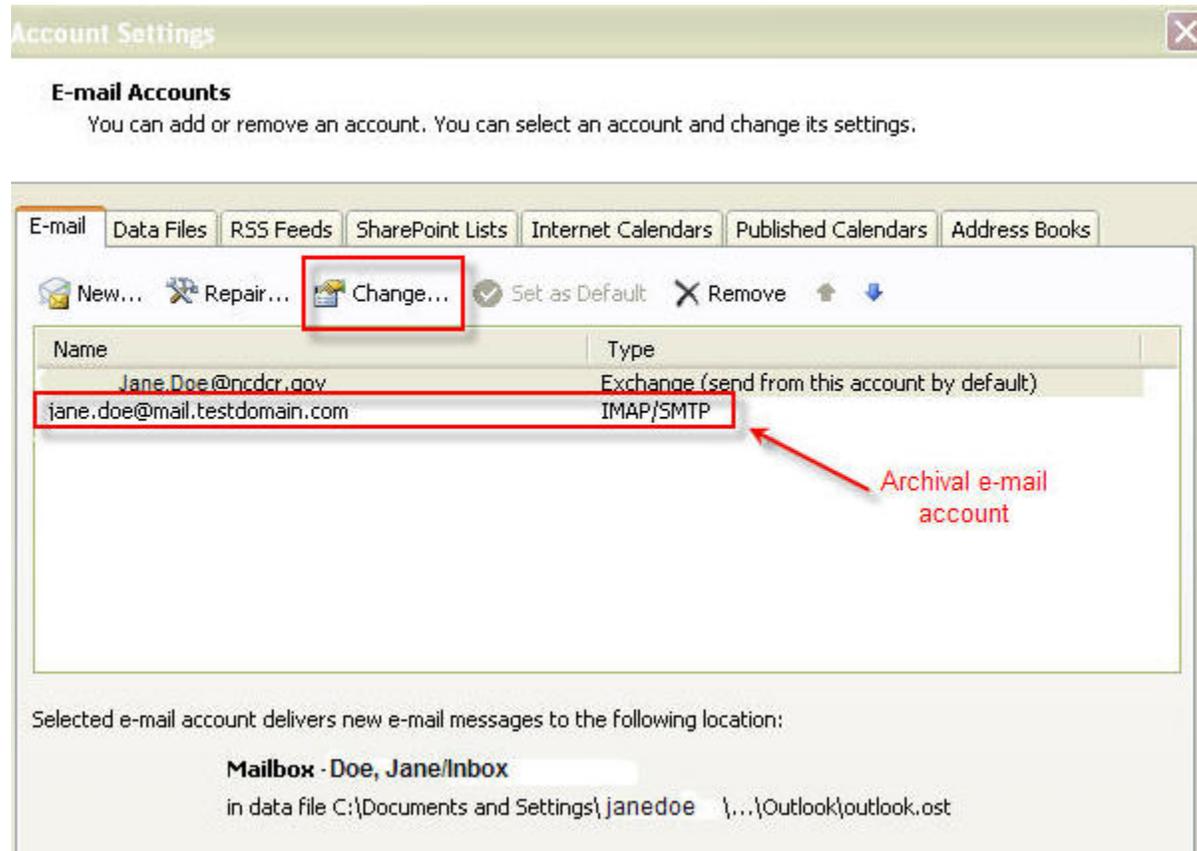


Figure 2. Archival account in Microsoft Outlook

From the navigation bar, select **Tools** → **Account Settings**.



An Account Settings window will open that displays all the e-mail accounts associated with Outlook. Highlight your archival account, and then select **Change**.



A Change E-mail Account window will appear (Figure 3). You will see the user name, EMCAP e-mail address, and a blank space for your new password. Enter the new password you just created in the Welcome to Emcap page. Leave **Remember password** checked. Click **Next** to advance through the windows, and then **Finish**.

Change E-mail Account

Internet E-mail Settings
Each of these settings are required to get your e-mail account working.

User Information
Your Name: Jane Doe
E-mail Address: jane.doe@mail.testdomain.co

Server Information
Account Type: IMAP
Incoming mail server: mail.testdomain.com
Outgoing mail server (SMTP): none

Logon Information
User Name: jane.doe@mail.testdomain.co
Password: *****
 Remember password
 Require logon using Secure Password Authentication (SPA)

Test Account Settings
After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)
Test Account Settings ...

More Settings ...

< Back **Next >** Cancel

Type the password you created in the EMCAP Welcome page. Then click Next.

Figure 3. Change password in Outlook

Creating Folders for Your EMCAP Account in Outlook

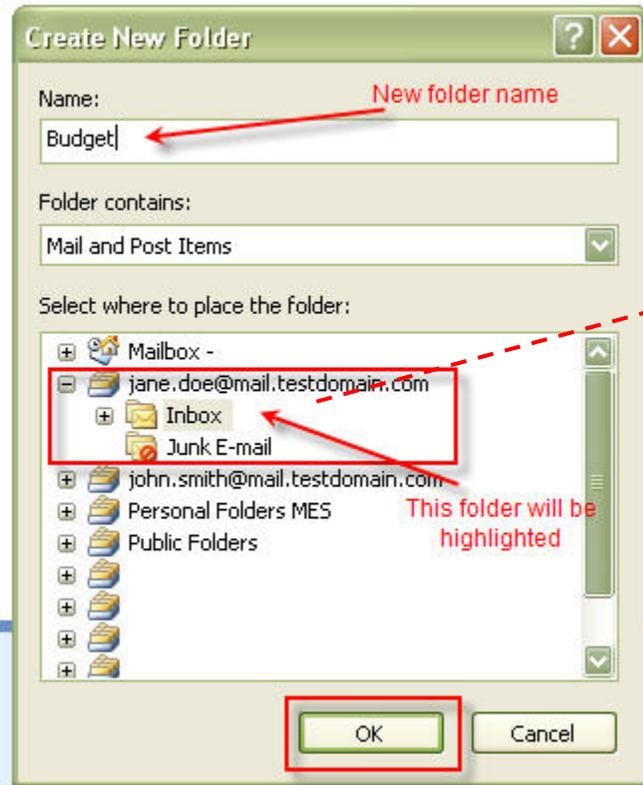
To keep your EMCAP archive messages organized, create folders in your EMCAP account based on the folders in your regular e-mail account, taking into consideration your retention and disposition schedule. There are two ways to create a new folder.

1. Right-click on the **Inbox** in your EMCAP e-mail account and select **New Folder**.

OR

2. From the toolbar, select **File** → **Folder** → **New Folder**.

A Create New Folder window will open. 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**.



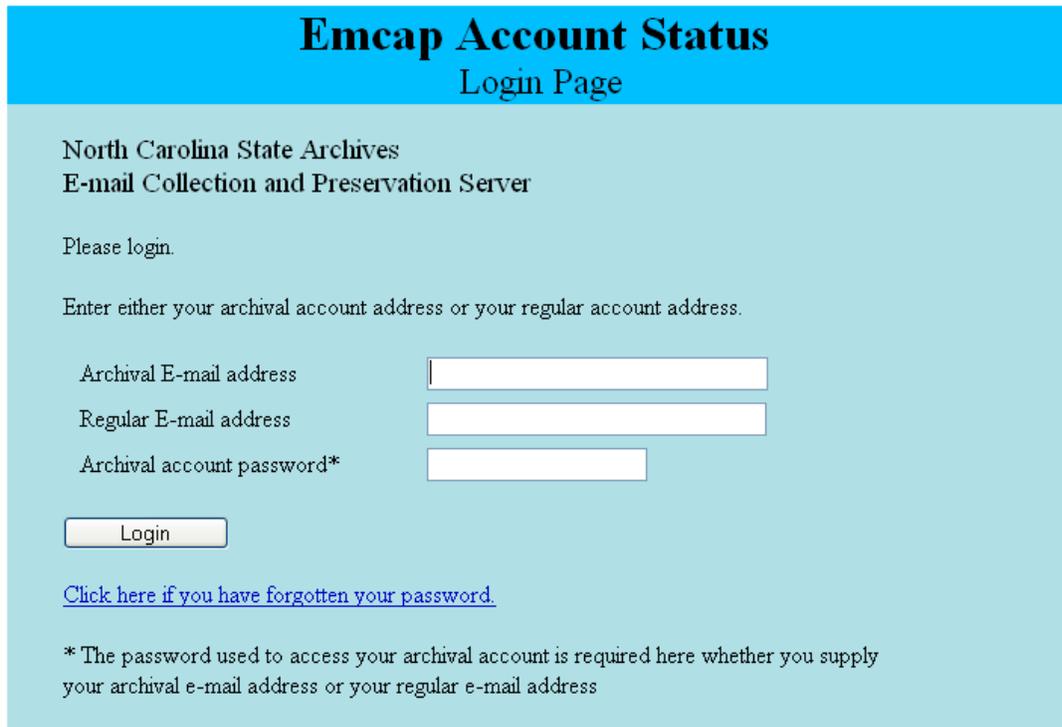
The folder will now appear nested below your EMCAP Inbox. If the folder is not placed in the EMCAP account as shown, mail in that folder will not be archived by EMCAP.



Repeat this process as necessary.

Managing Your EMCAP Account

After you have created your password in Outlook, you can then access the EMCAP Account Status page where you can manage your account. The link to the site is: <https://emcap.ncdcr.gov> (Figure 4).



Emcap Account Status
Login Page

North Carolina State Archives
E-mail Collection and Preservation Server

Please login.

Enter either your archival account address or your regular account address.

Archival E-mail address

Regular E-mail address

Archival account password*

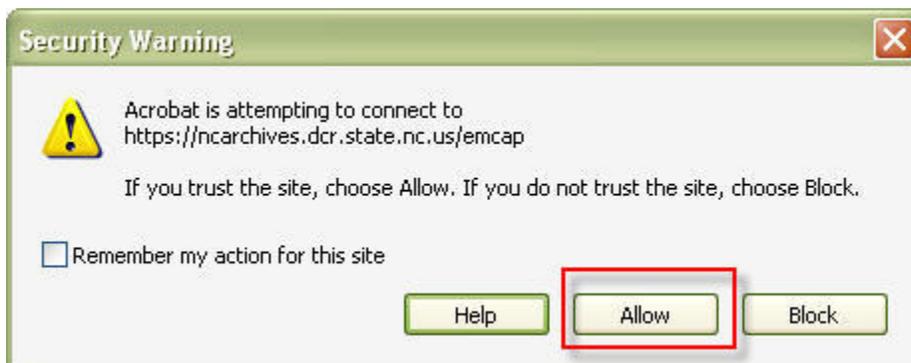
[Click here if you have forgotten your password.](#)

* 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 4. Emcap Account Status

To log in, you must provide your archival e-mail address or your regular e-mail address and your archival account password (this is the password you created on the Emcap Welcome Page and updated in Microsoft Outlook) and then select **Login**.

The first time you log onto the Account Status page, you will likely receive a Security Warning or Alert window (depending on the browser you are using) (Figure 5) asking whether you or not you trust this website.



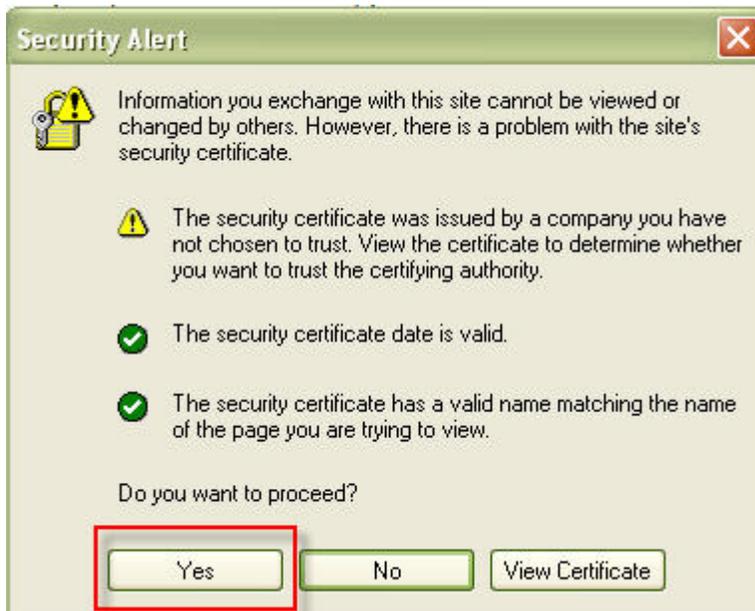


Figure 5. Security Alert window

To proceed, select **Allow** or **Yes** (depending which window is displayed).

The Emcap Account Status site (Figure 6) 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. From this page you can update your normal work e-mail address and unit name (the unit in which you work). To log off this page, select the **Log Off** button located at the bottom of the screen and then close the Account Status window.

Emcap Account Status

North Carolina State Archives
E-mail Collection and Preservation Server

Account Status for: Jane Doe

Contact e-mail address:

Unit Name:

Last Archival Collection: Friday, May 08, 2009
Messages Archived: 586
File Space: 0

Date of Earliest Message: 2007
Date of Latest Message: 2009

Archival Account Address:

Created: Thursday, May 07, 2009

Figure 6. Account Status window

If You've Forgotten Your Password

If you have forgotten your archival password, you can request a new password. On the Emcap Account Status window, select the link "Click here if you have forgotten your password" (Figure 7).

Emcap Account Status
Login Page

North Carolina State Archives
E-mail Collection and Preservation Server

Please login.

Enter either your archival account address or your regular account address.

Archival E-mail address

Regular E-mail address

Archival account password*

Login

[Click here if you have forgotten your password.](#)

*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 7. Forgotten password

The EMCAP Archival Mail wizard will appear which will begin the process of resetting the password that you use to gain access to your archival e-mail account. Click **Next**.

On the next page, provide either your archival e-mail address or your regular e-mail address, and then click **Next**.

Introduction
EMCAP Archival Mail
Identification
Password
Send E-mail
Complete

Provide either the e-mail address of the archival account or your regular e-mail address.

Archival E-mail address: john.smith@mail.testdomain.com

Regular E-mail address:

Previous **Next** Cancel

On the next page, enter and then re-enter your new password in the fields provided. Click **Next**. *Please remember that passwords must be at least 6 characters in length and must contain at least three of the following types of characters: uppercase letter, lowercase letters, numbers, and symbols.*

The next page summarizes the account you're changing and where a confirmation e-mail message will be sent. Select **Send**.

Introduction
Identification
Password
Send E-mail
Complete

EMCAP Archival Mail

Password reset summary

Press the send button to complete the password change request.

An e-mail message with further instructions will be sent to
john.smith@ncdcr.gov

For Account: **john.smith@mail.testdomain.com**

Send

Previous Finish Cancel

A window confirming the e-mail message was sent will appear. Select **Exit** to close the wizard.

You will receive a message in your regular e-mail Inbox asking you to click on a link to complete the password reset request.

<<User Name>>,
Please click on the following link to complete the password reset request.

<https://ncarchives.dcr.state.nc.us/EMCAP/UpdatePass.aspx?accountid=71&sess=WJiR4tJ521klGgEU7iNgJw>

You must use this link within 48 hours from the time this message was sent.

Please do not reply to this e-mail message.

Sent from the Emcap Web Site (/EMCAP)

A new screen will appear confirming the completion of the password request. Select the **Account Status** button to proceed to the Account Status page.



From the Emcap Account Status page, you will be able to log into the Account Status module.

Please note that you **MUST** change your password in Microsoft Outlook so that it is identical to your new password. Please see *“Updating Your Password in Outlook”* on Page 5 to change your password.