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 2: Moving E-mail

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Moving E-mail Messages to EMCAP

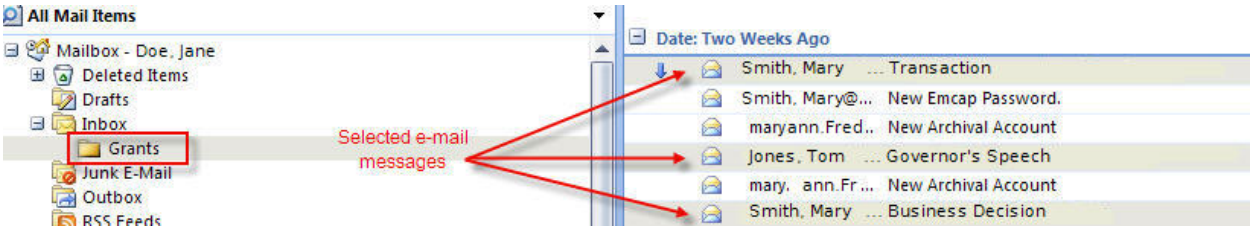
Outlook offers many shortcuts for moving your archival messages from folders in your personal e-mail account to the EMCAP e-mail account. This section outlines several options; use those that make the most sense for the quantity and the location of messages you need to move. EMCAP is only for messages of a permanently archival nature; so employees should consult their agency record retention and disposition schedule when deciding when to archive e-mail messages.

Because the EMCAP tool is currently a pilot, all messages should be copied to the EMCAP e-mail account. When you copy a message, the message remains in the original folder and a duplicate is saved in the destination folder. Moving the message will delete it from the original folder. If the EMCAP tool is being used in a production environment (you will need to verify this with your IT department), you can ***move*** *the e-mail messages instead of copying them. The instructions for moving are essentially the same as copying the messages.*

Copying Individual E-mail Messages

Based on your agency record retention and disposition schedule, you may determine that only certain e-mail messages within a folder need to be copied to your archival e-mail account.

In your personal e-mail account, click on the appropriate folder to display the messages it contains. In this example the folder is named *Grants.* Holding down the **Ctrl** button on your keyboard, click on the individual messages you would like to copy.



From the toolbar, select **Edit → Copy to Folder**. A Copy Folder window will appear (Figure 1). Select the archival e-mail account folder to paste the e-mail messages and then select **OK**. Your copied e-mail messages will appear in the selected archival e-mail account folder.

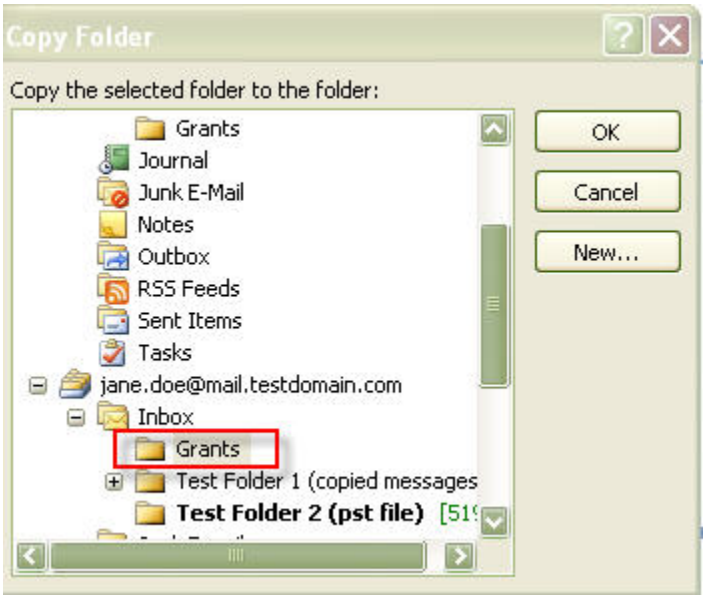


Figure 1. Copy e-mail messages

Copying E-mail Messages by Folder

Another option is that you may be able to copy an entire folder of messages to your EMCAP account for archiving, perhaps once a project is completed. In this case, the simplest way to copy folders of messages is to copy and paste the entire folder into the EMCAP account.

Right-click on the folder in your personal e-mail account to be copied to the archival e-mail account. In this example the folder is named *Grants.* Click **Copy "folder_name"** from the drop down menu (Figure 2).

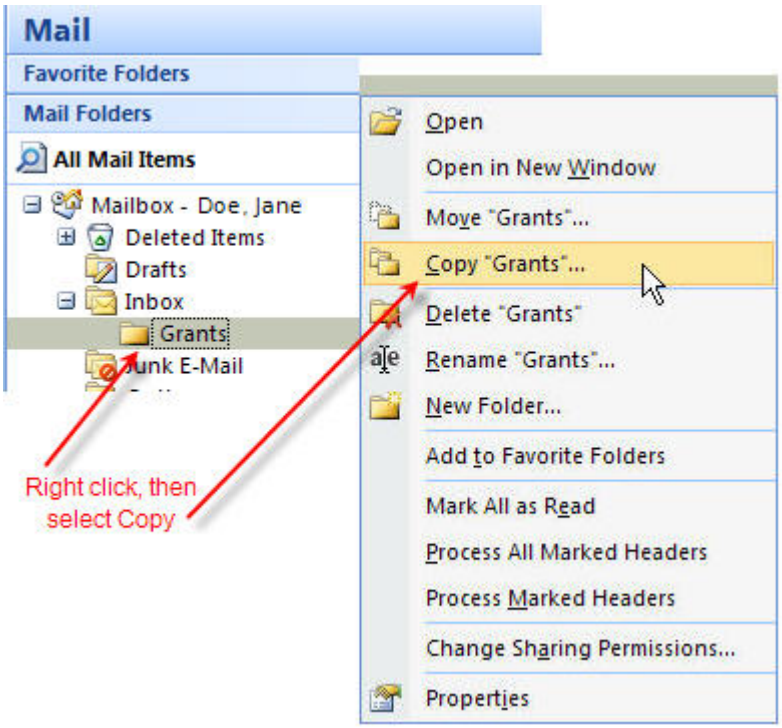
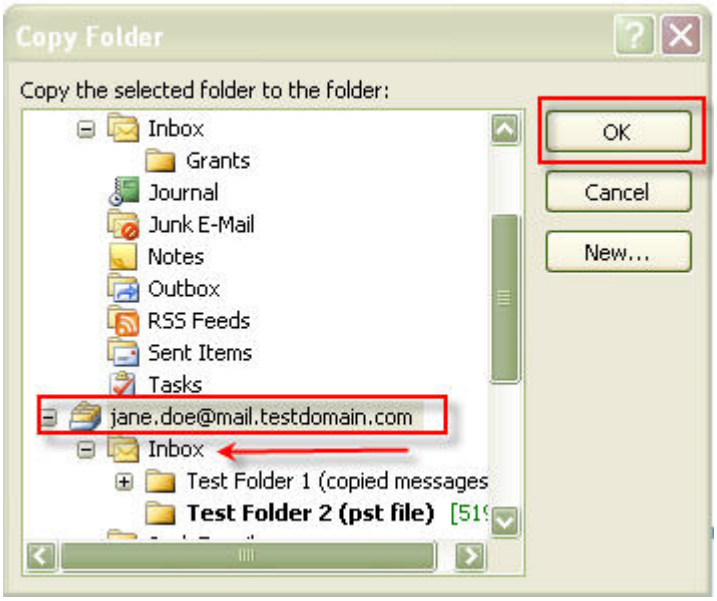


Figure 2. Copy folder

A Copy Folder window will appear. Select the archival e-mail account **Inbox** to paste the entire folder as a nested folder underneath it, and then select **OK**. Figure 3 shows how the *Grants* folder will appear in the EMCAP account.



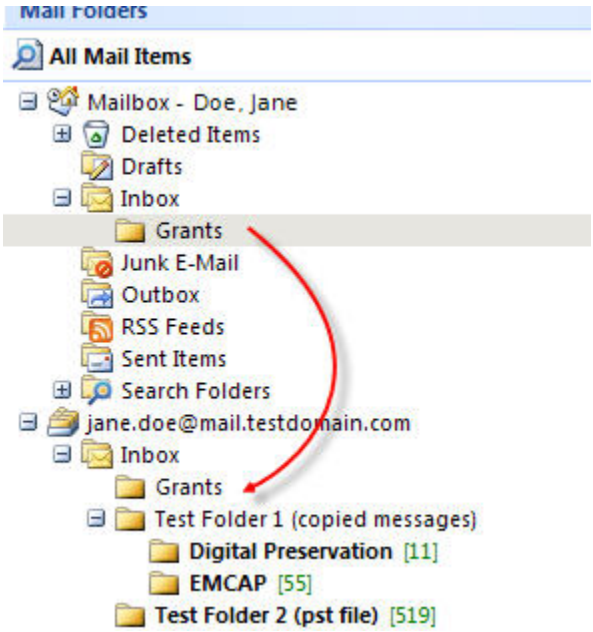


Figure 3. Copied folder in archival e-mail account

Copying E-mail Messages by Subject or Sender

If using the EMCAP tool is a jumpstart to organizing your folders, you might need to take advantage of some search tools. The first tool enables you to find messages related to a single e-mail message, based on the subject heading or the sender. The following example finds all related messages based on the subject heading.

Select an e-mail message that should be copied to your archival e-mail account. Right-click the message to view the drop-down menu. Then select **Find All → Related Messages** (Figure 4).

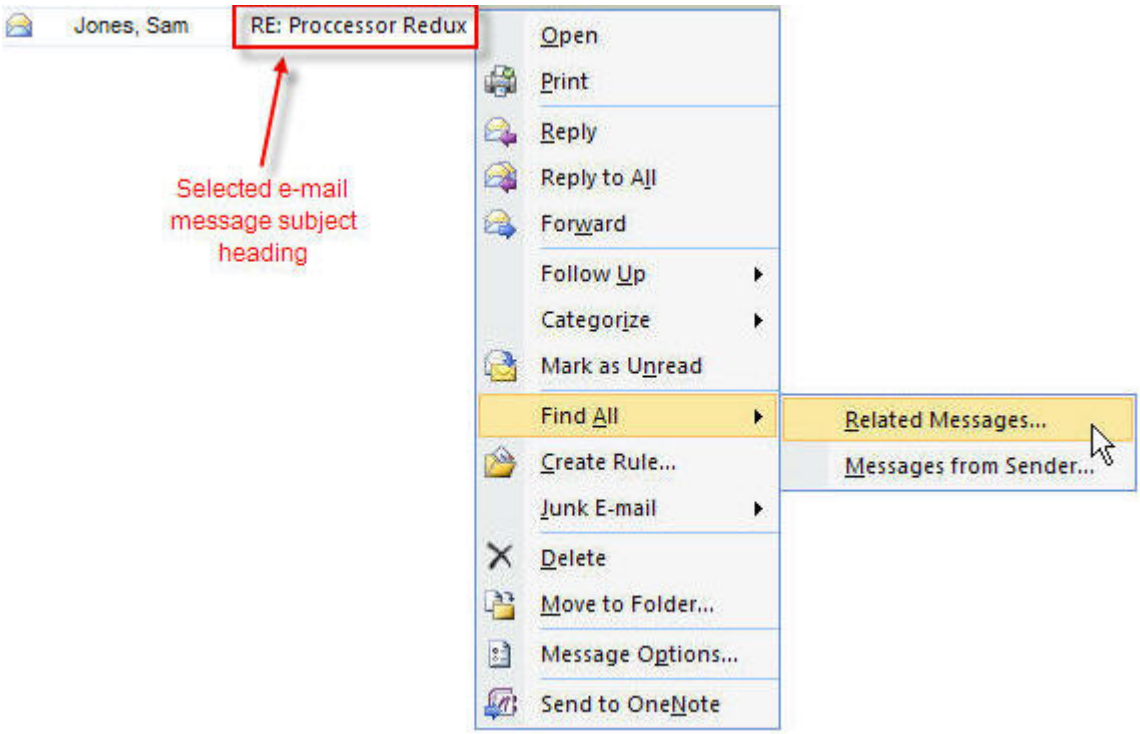


Figure 4. Find related messages

An Advanced Find window will appear with a subset of all of the related messages (Figure 5). To review any of the messages, double-click on a message in the list and it will open normally, just like you are opening it from your Inbox. You can sort the messages by the column headings, including date sent, sender, or current folder location.

If all of the messages can be copied together, from the toolbar select **Edit →Select All**. Select **Edit** again and select **Copy to Folder** (Figure 5). If you want to copy only a few of the messages hold down the **Ctrl** key while clicking on the messages you want to include before choosing **Copy to Folder**.

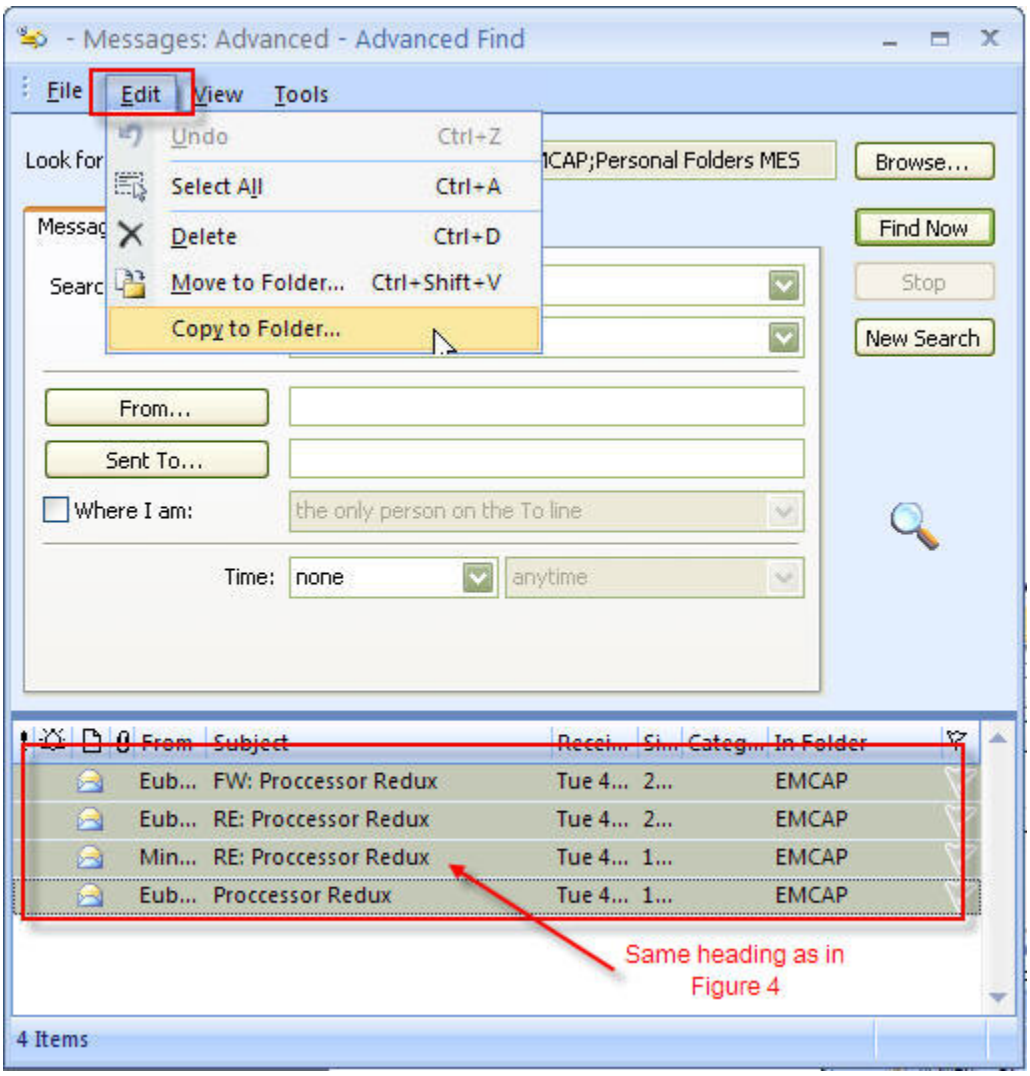


Figure 5. Copy messages with same subject heading

A Copy Items window will appear (Figure 6). You can select the folder where you want to store the selected messages and then click **OK**.

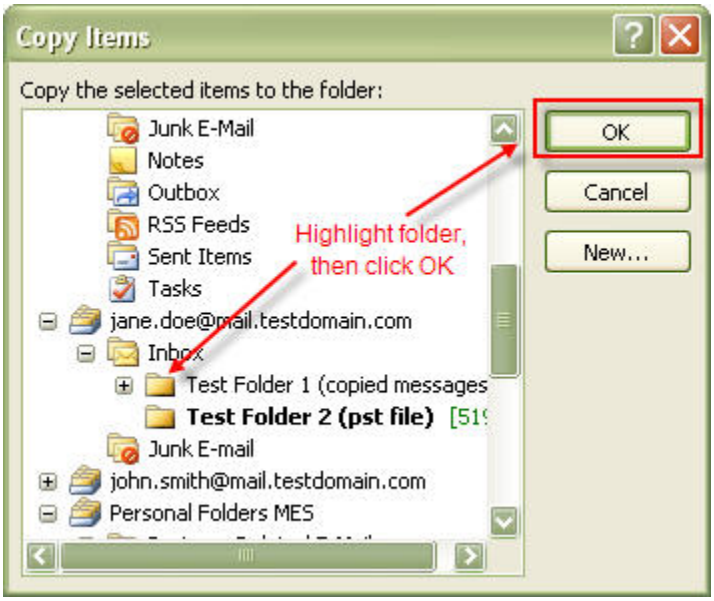
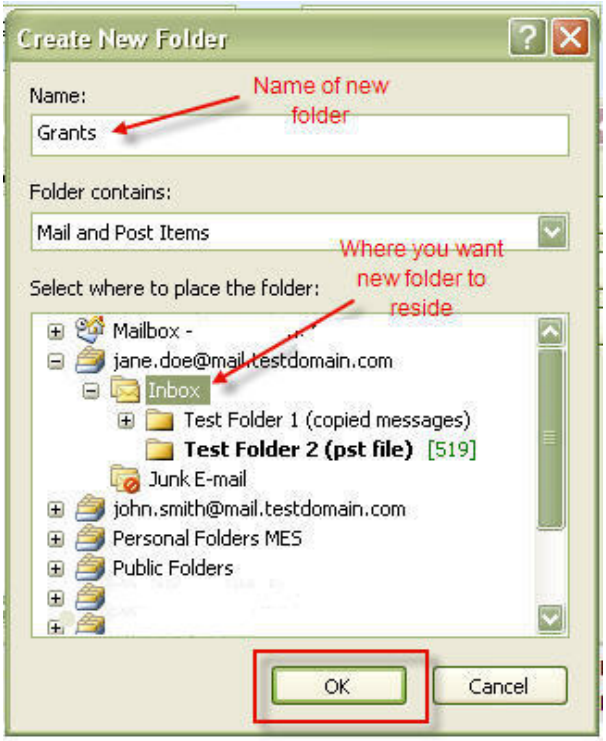


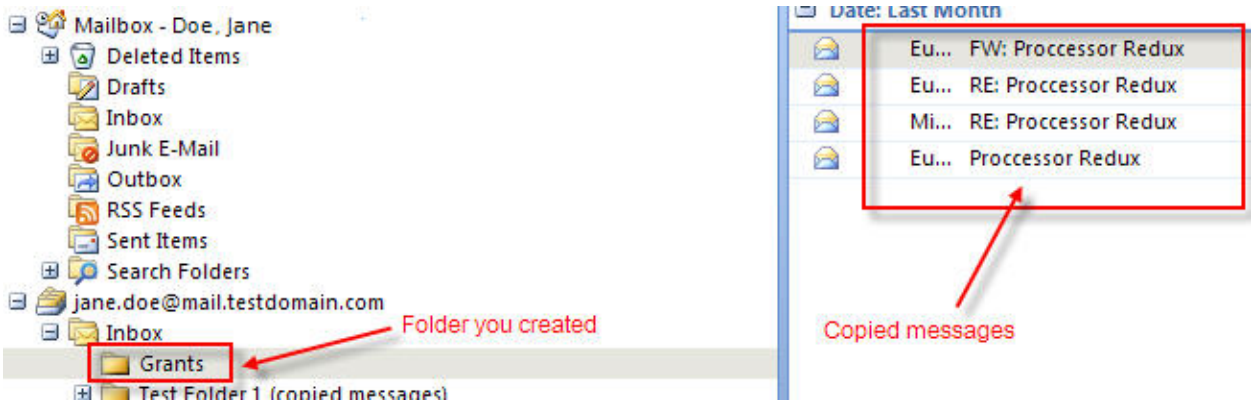
Figure 6. Copy items

If a folder does not exist to accept the copied e-mail messages, you can create one from the Copy Items window. Select the **New** button on the right side of the window. This will open the Create New Folder window.

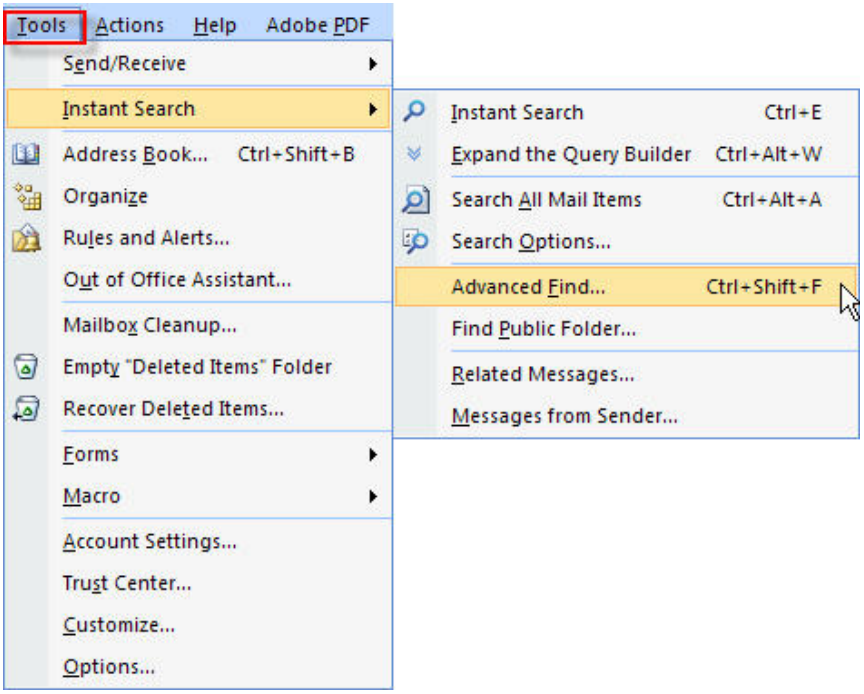


Enter the name of the new folder in the text box (in this example it the new folder name is *Grants*). Make sure that the archival e-mail account Inbox folder or a folder within the Inbox is selected as the location for the new folder. Press **OK**.

The folder you created will be highlighted as the destination for the copied messages. Select **OK**. The messages will be copied and you will be returned to the Advanced Find window. Close this window. To view the copied messages, select the folder you created during this process.



Alternatively, you can access this search tool without first selecting a specific message. From the Outlook toolbar, click on **Tools → Instant Search → Advanced Find**.



The Advanced Find window will open, like that in Figure 5, except without any messages listed.

From this window, you can search based on subject, keyword, sender, or recipient; you can also identify specific folders to search.

When you are finished, close this window to return to your Inbox.

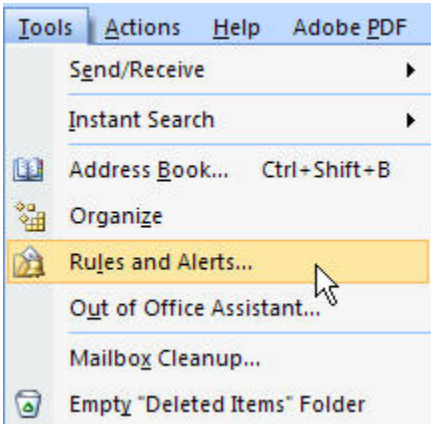
Setting Rules for Future E-mail Messages

Note that Rules can only be used by those on a Microsoft Exchange server. Check with your IT department if you have questions.

There may be a situation where you know that e-mail messages from a particular sender automatically identify those messages as permanently archival. In this case, it could be helpful to set a rule that tells Outlook to copy any message received from that e-mail address to a pre-determined folder. This is an easy to way to automatically sort messages as they arrive in your Inbox instead of waiting until a project is completed or until a designated time to manually sort through messages.

Care needs to be taken in setting up this tool to ensure they are in agreement with your agency's retention and disposition schedule.

From the Outlook toolbar, select **Tools → Rules and Alerts.**



A Rules and Alert pop-up window will appear. Under the E-mail Rules tab, where it says "Apply changes to this folder", select your primary e-mail account from the drop-down menu, and then select **New Rule** (Figure 7).

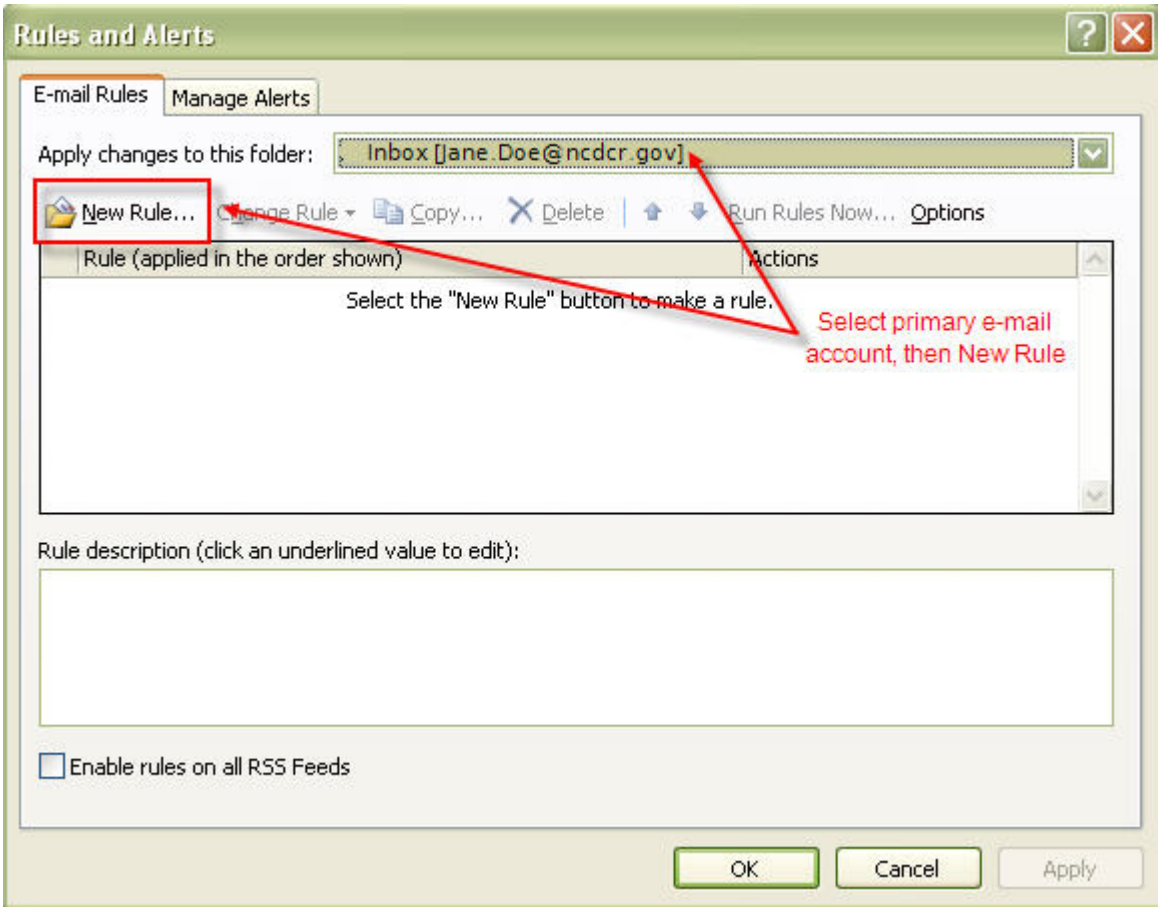


Figure 7. Rules and alerts

A new window, Rules Wizard, will appear (Figure 8). In this example we will create a rule to copy to the DCR folder on the EMCAP server all incoming messages that have *DCR* in the subject line.

At the bottom of the list of template options, under **Start from a blank rule**, highlight "Check messages when they arrive" and then click **Next.**

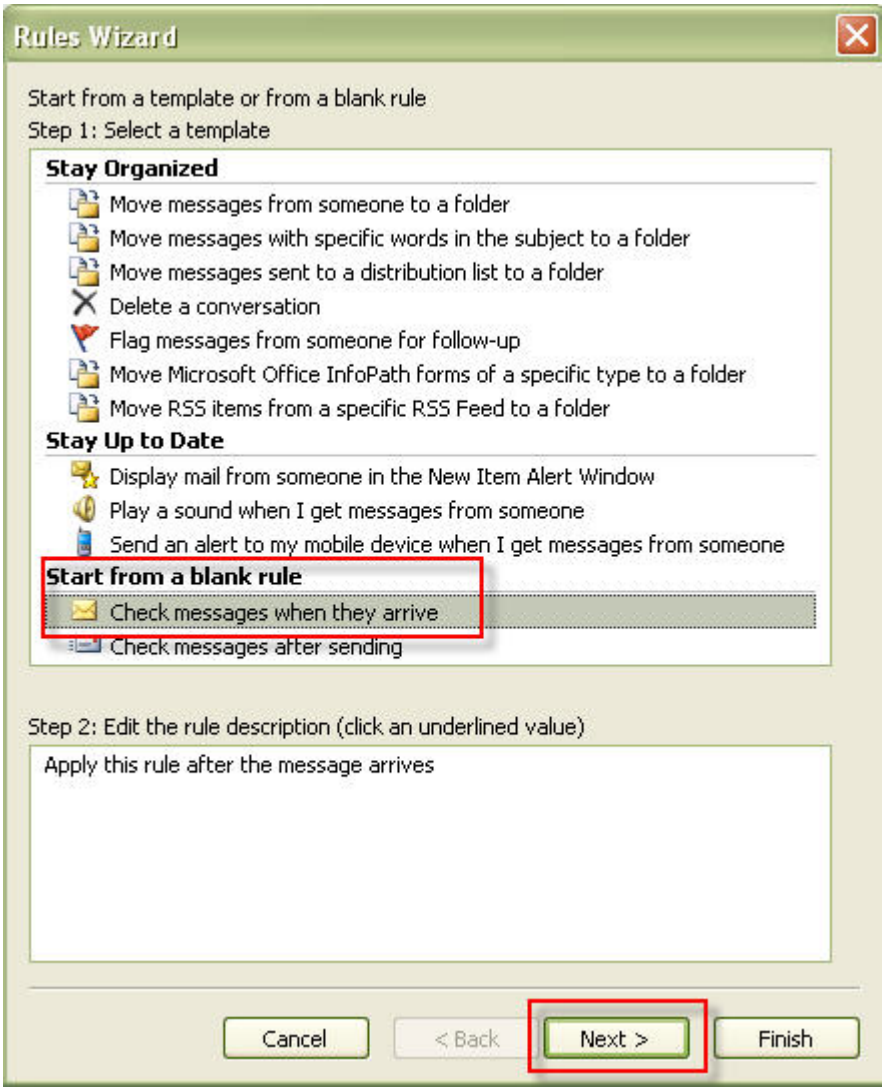


Figure 8. Blank rule

Note that the other option is “Check messages after sending.” You can create similar rules to check incoming and outgoing messages. To set up rules for sent mail, continue with the following steps; just highlight “Check messages after sending” instead of “Check messages when they arrive.”

The next window (Figure 9) displays the conditions for the rule you want to create. Check **with specific words in the subject**.

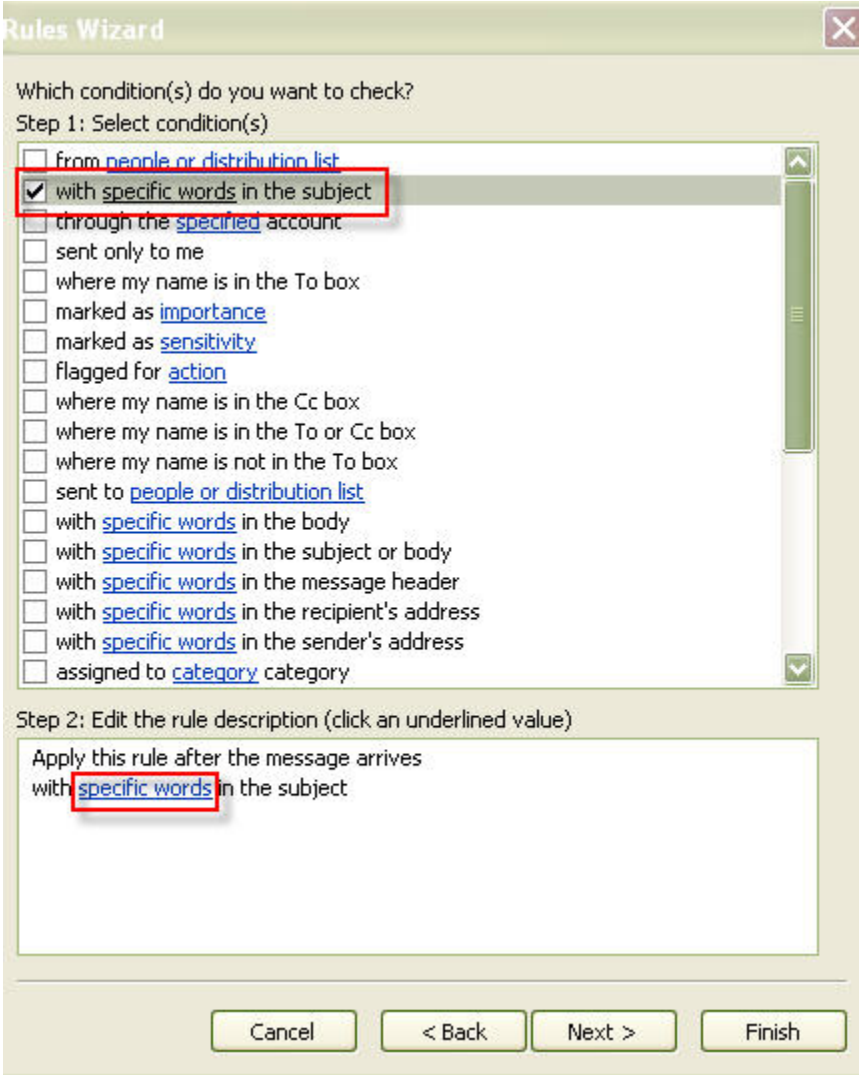
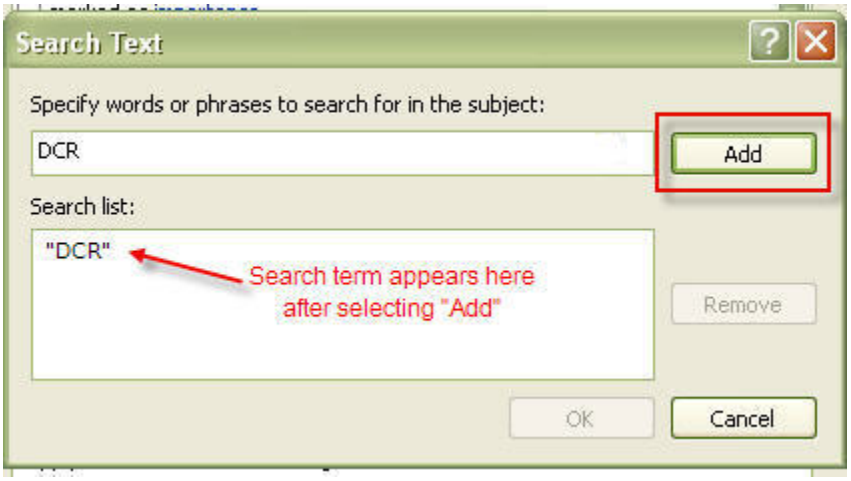


Figure 9. Specific words

Notice that the phrase **specific words** is underlined in Step 2. **Click** on the underlined text to open a new Search Text window (Figure 10). This is where you will enter the keywords in the subject line of an incoming e-mail that will flag the message to be copied to the archival e-mail account.



In our example we will enter *DCR*. Click **Add**. This will add *DCR* to the **Search list** in the bottom window. One at a time, continue to add any other keywords that must be in the subject line to flag the message.

Press **OK**. This will close the Search Text window and return you to the Rules Wizard screen. Click **Next**.

Now that you have selected the conditions you want to check for each e-mail that enters the system, you must tell Outlook what to do with those messages. In our example we will copy the flagged messages to the DCR folder in the archival e-mail account.

Select **move a copy to the specified folder**. Just like in the previous step, click on the underlined text in Step 2 of the wizard (Figure 10).

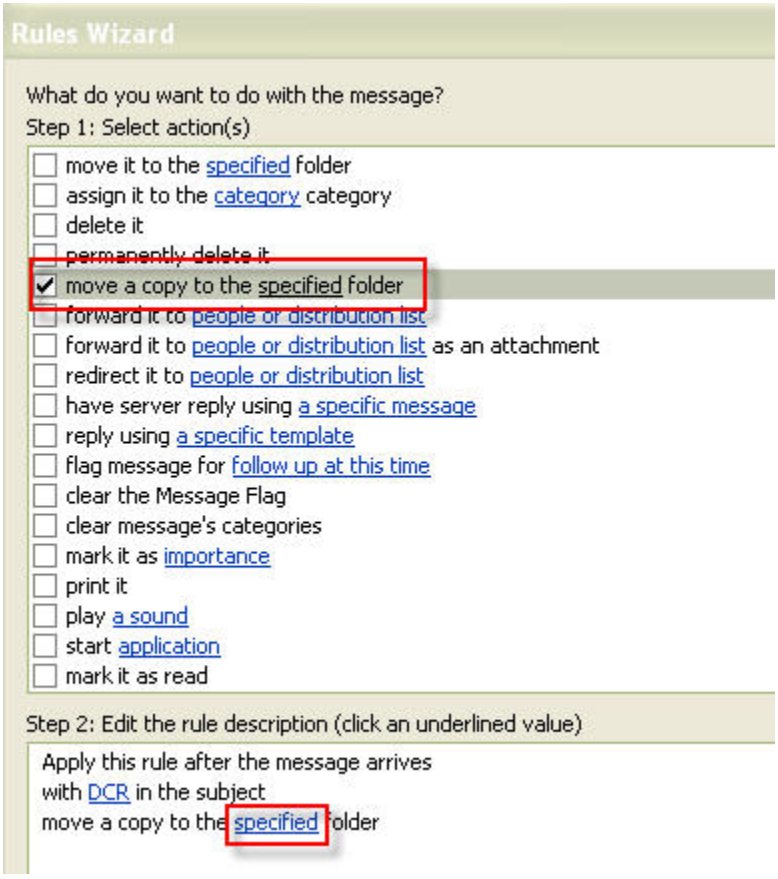


Figure 10. Specified folder

This will open a new window where you will select the folder to which the flagged messages will be copied.

Refer to Page **9** for steps to create a new folder. Otherwise, select the existing folder – in our example, the *DCR* folder in the archival e-mail account – and press **OK** (Figure 11). Click **Next**.

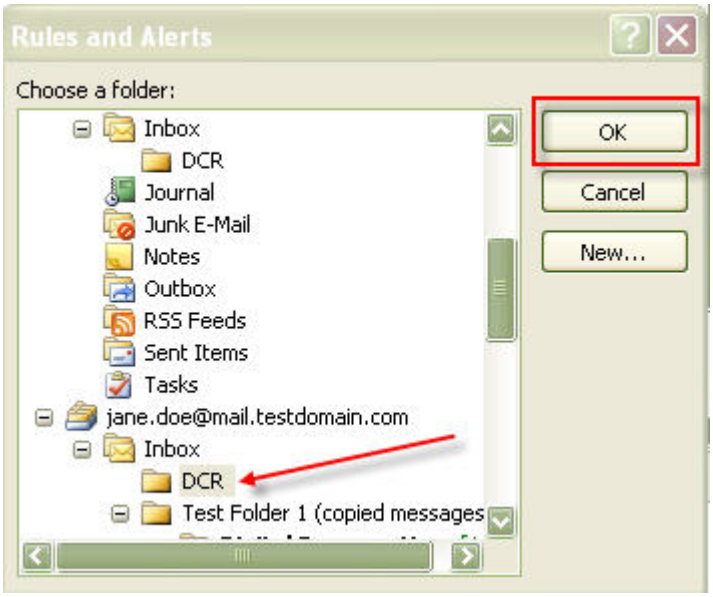


Figure 11. Destination folder

The final step in creating a rule is to identify exceptions. For example, messages from certain e-mail addresses like list-serves may not be relevant. Follow the steps as outlined for the previous screens: check the appropriate box and click on the underlined text to define the rule. Once you are finished, press the **Next** button at the bottom of the window.

The final window will appear (Figure 12).

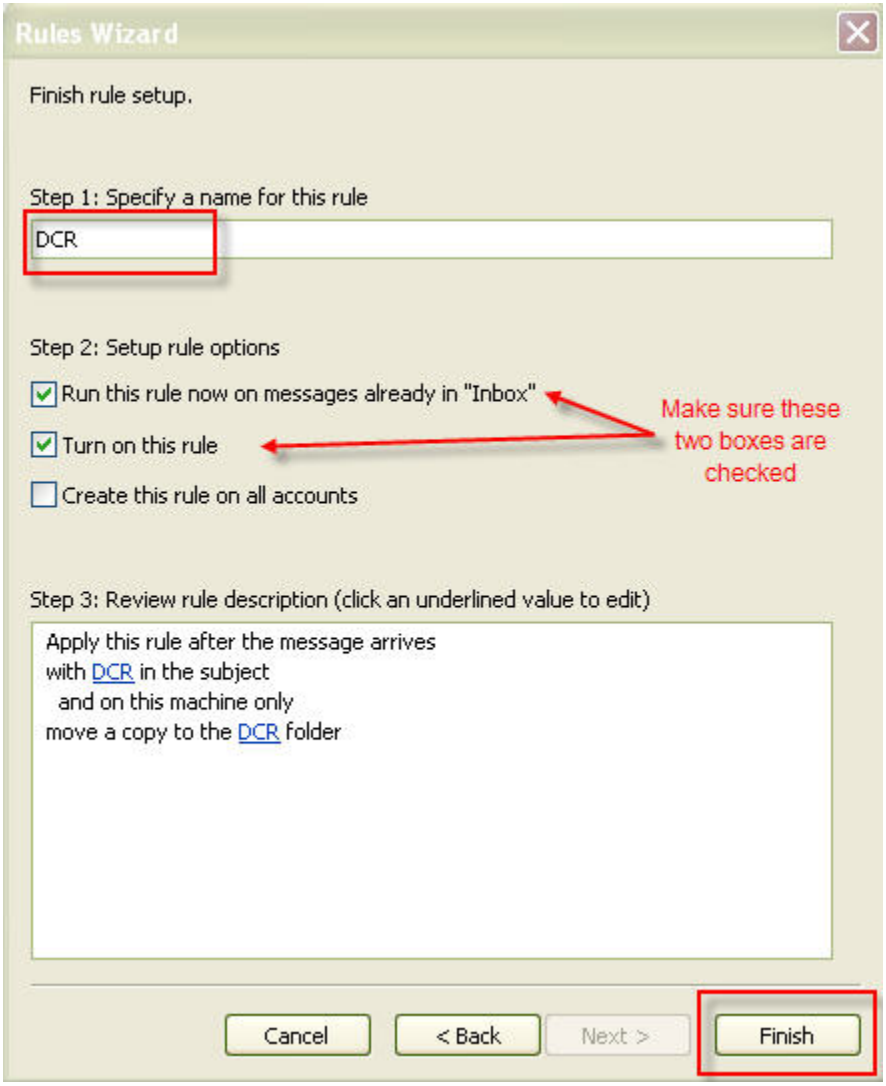


Figure 12. Complete rules wizard

In the text box at the top of the window, enter a name for the rule. Our example is named *DCR*.

Next, check the first two boxes to run the rule on messages already in your "Inbox" and to turn on this rule to run from this point forward.

Finally, review the rule description at the bottom of the window. If you need to make changes, select the underlined text or press the **Back** button at the bottom of the window to the appropriate page. Otherwise, press **Finish** to exit the Rule setup wizard.

*Note that you can delete this rule at any time. On the main Rules and Alerts window (see Figure 7), highlight the rule and select the **Delete** button.*

Conclusion

Any of the methods explained in this manual can be used to manage your e-mail account according to your records retention and disposition schedule. Choose those that work the best for you, based on the types of records you receive and how you currently manage your e-mail messages.

Once you begin copying or moving e-mail messages into the archival e-mail account, you can track your progress by accessing the Emcap Account Status site at https://emcap.ncdcr.gov , which provides information about how many of the e-mail messages you have copied or moved to your EMCAP e-mail account have been "archived". The term archived means that these messages have been captured from your account, have been processed by an archives staff member, and are being stored in another location on the archival server.

It is important to remember that once you've copied archival e-mail messages into your archival e-mail account and they have been "archived", you cannot delete these messages from your archival e-mail account. If you attempt to delete the e-mail message it does not disappear, but instead has a strikethrough line drawn through it. So, while it may appear that the file is deleted, in fact it is not.