ARCHIVING EMAIL

What is Email?

- Email is a means of transmitting computer-based messages over a network, typically the Internet (North Dakota Information Technology Department).

- North Dakota ITD provides email services to the majority of state government agencies.

- Email is one of the most widely used communication tools for state employees.

- Correspondence occurs through email with state and federal agencies, organizations, and the general public.

- Email provides a written record of daily business in North Dakota's state government.

- **Email on the state system is public record** and therefore, is discoverable.
  - Do not put anything in an email that you would not want to see on the front page of the local newspaper.
  - State email should _**not**_ be used for personal emails.

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Email Preservation

- Because email provides a record of daily business in North Dakota state government, it is important to determine if the email is an official record.

- According to ND ITD Records Management, it is an official record if it:
  - Is made or received pursuant to law or in connection with the transaction of official business,
  - Preserves evidence of the organization, functions, and activities,
  - Or documents programs, policies, and decisions.

- Email (and all electronic records) follow the same retention schedule as printed materials.

- Retention is based on message content, not message format.

- See ND Records Retention Program here:
  https://apps.nd.gov/itd/recmgmt/rm/recSer/retention.pdf

Managing Email

- By following email management procedures established by ITD Records Management and the State Archives, staff will save a huge amount of time touching the email message once.

- With the amount of emails generated by employees, it is best to manage email before the mailbox is full.

- Use best judgement to appraise which emails will be beneficial for the future and it is not necessary to keep every listserv email or advertisement.
    - Not every email is an official record. Unnecessary emails can be deleted.

- It is best to keep some form of the initial request and correspondence back & forth in order to understand the historical context of the correspondence.
    - With a chain of messages, retaining the final email will typically capture all of the previous messages and will establish this context.
    - Be sure to track sent messages as well. The sent messages will also fill up your inbox space.
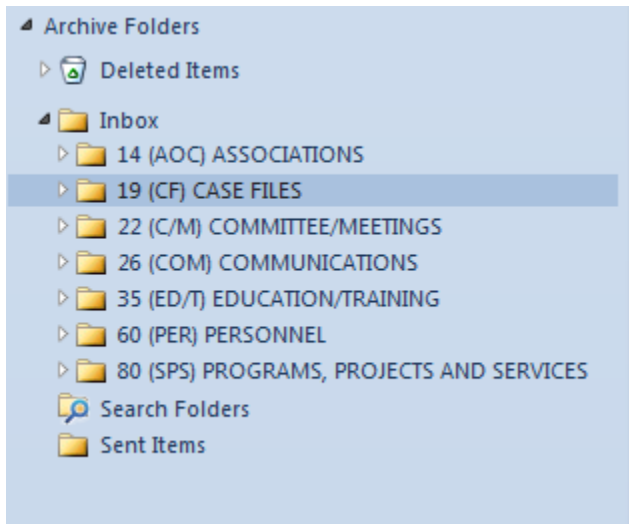
Managing Email

- Even if the records you produce are not permanent, it will be helpful to manage emails for future use.
    - For example, if a donor contacts you regarding the transfer of a previous donation, you will have all correspondence regarding the donation organized in archived folders and easily accessible.
    - Or, a colleague wishes to know all items that were on display in an exhibit, you can access your email regarding the installation of the exhibit to provide that information.

- Storage management options for email include:
    - Use the *Archive Folders* found in *Microsoft Outlook,*
    - Move electronic file of email to a different file location,
    - Or print and file hard copies of the emails.

- *Microsoft Office* may prompt you to auto archive items that have not been accessed a long time. Always ignore these messages – this will make your messages unorganized on your C drive.

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Using Archive Folders

- A way to manage email is to take advantage of the *Archive Folders* found in your *Microsoft Outlook* email.
  - This archives emails to a hidden location on the C drive of your computer.

- Using the *Archive Folders* allows for easy access within *Microsoft Outlook.*
  - A folder named *Archive Folders* is located below *Inbox* on the *Navigation Pane.*
  - Within *Archive Folders*, you can create your own subject subfolders; however, you cannot access these *Archive Folders* using a phone, tablet, or entering your email through the online portal.

- ITD Records Management suggests treating email like correspondence and filing by subject.

- Use filing standards and classification.

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Example: Using Archive Folders

Archive Folders
- Deleted Items
- Inbox
  - 14 (AOC) ASSOCIATIONS
  - 19 (CF) CASE FILES
  - 22 (C/M) COMMITTEE/MEETINGS
  - 26 (COM) COMMUNICATIONS
  - 35 (ED/T) EDUCATION/TRAINING
  - 60 (PER) PERSONNEL
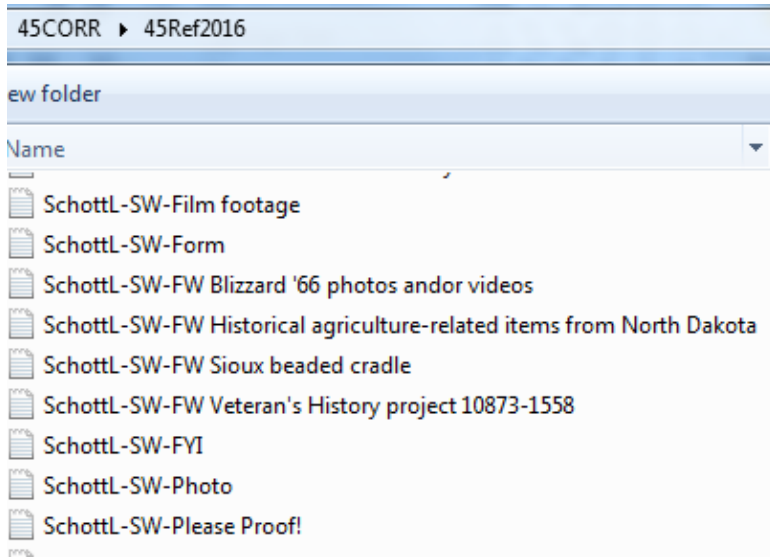 - 80 (SPS) PROGRAMS, PROJECTS AND SERVICES
- Search Folders
- Sent Items

- Within the *Microsoft Outlook* application, archived email is first sorted by the State Subject Classification System utilized by ITD Records Management.

- These subjects can be found here: https://www.nd.gov/itd/sites/itd/files/legacy/services/records/nd-subject-classification-system.pdf

- The archived email navigation is found in the *Navigation Pane*, usually found on the left side of the screen in *Microsoft Outlook*.

- Again, your records may not be permanent, but this is a way to keep your records organized and accessible.

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Example: Using Archive Folders

```
▲ 📁 80 (SPS) PROGRAMS, PROJECTS AND SERVICES
  ▲ 📁 2015
    ▲ 📁 Electronic Records
        📁 Transfers
    ▲ 📁 Exhibits
        📁 Governors Gallery-Green Revolution
        📁 Sperry Gallery-CCC in State Parks
      📁 ReDiscovery Database
  ▲ 📁 2016
    ▲ 📁 Electronic Records
        📁 DAM
        📁 FileNET
        📁 Metadata
        📁 Policy Development
        📁 Possible Systems
        📁 Preservica
        📁 Scanning Procedures
        📁 Social Media Preservation
        📁 Transfers
        📁 Tutorials
    ▲ 📁 Exhibits
        📁 Sperry Gallery
        📁 World War I
      📁 ReDiscovery Database
      📁 Supervisory Projects
```

- After the directories are established by the State Subject Classification System, break down each directory by year.

- Within the years, separate based on project, topic, subject, etc.
  - It is best to create folders based on years to easily delete the messages when they have met their retention period.

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Move Emails to a Different Location


```
45CORR ▸ 45Ref2016
ew folder
Name                                                    ▼
    SchottL-SW-Film footage
    SchottL-SW-Form
    SchottL-SW-FW Blizzard '66 photos andor videos
    SchottL-SW-FW Historical agriculture-related items from North Dakota
    SchottL-SW-FW Sioux beaded cradle
    SchottL-SW-FW Veteran's History project 10873-1558
    SchottL-SW-FYI
    SchottL-SW-Photo
    SchottL-SW-Please Proof!
```

- Again, to best organize these emails, refer to the subject and filing standards: https://www.nd.gov/itd/sites/itd/files/legacy/services/records/nd-subject-classification-system.pdf

- Another option for managing emails would be to export the files into a preferred file format and save (see future slide for preferred file formats).

- This allows multiple people to save/view the emails in one location.

- Example, the State Archives reference staff exports correspondence as a plain text file. The files is saved by last name and first of initial of the correspondent, the initials of the staff's name, and a brief description of the content. Then it is saved to the network.
  - This allows for easy retrieval of messages based on titles and disposal when the retention period is met.

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Move Emails to a Different Location

- When moving emails to a different location, naming the file is essential for future access of the email.

- Name the message including sender and recipient name, and a brief description of the content, and save it to the network.
  - Recipient names should include first name initial and full last name.
    - Example: SchottL, LinkA, HoevenJ, WillG
  - Sender/Staff names should include first and last name initials.
    - Example: LS, AL, JH, GW

- The subject line of the email can be the brief description of the content in the file name, if it sufficiently describes the content.
  - If it does not describe the content, create a brief description of the email content.

- Example: LSchott to JJohnson Transfer of Records to Archives

- If you have questions regarding the naming of files, please contact the State Archives.

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Print Emails

- The last option for preserving emails is to print and file the hard copy.

- It is best to keep born digital files as is for preservation of original copy.

- If this is the only option, once printed, file emails following the ITD Records Management filing and classification standards:
https://www.nd.gov/itd/sites/itd/files/legacy/services/records/nd-subject-classification-system.pdf

Preferred File Formats for Email

- If the retention of the record is permanent, emails should be transferred electronically to the State Archives for preservation.

- It is important to save the emails in a preferred file format for preservation purposes.

- The State Archives accepts emails in PDF/A, PDF, or plain text formats.
    - The State Archives does not accept PST files.
    - Please contact the electronic records archivist at the State Archives with questions regarding file formats.