Retaining E-mail

Scope: SO, CCC	Revision Date: 12/13/2018

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1. Introduction

When you need to retain an e-mail message that contains DCL3 data, you will need to take action on those messages in your O365 mailbox so that they are properly retained per state retention and moved into the CSCU Protective Enclave.

Prior to accessing DCL3 data only from the Protective Enclave, you may have stored emails that contained DCL3 data in a DCL3.pst (Outlook Data File) and were instructed to move mail out of your mailbox into a DCL3.pst. Since DCL3 data should only be accessed from the Protective Enclave and mail that needs to be retained for records management also needs to have the email's metadata retained (data about how the email was received), then **individual email messages that contain DCL3 data that needs to be retained, needs to be moved into the Protective Enclave** using this procedure.

The DCL3.pst should not be moved into the Enclave because it cannot be opened from inside the Enclave. If you have already moved a *.pst into the Enclave, it will need to be moved out, scanned using Spirion and individual emails saved as *.msg files and those moved into the Enclave.

2. Procedure

The CSCU Data Management standard requires any email that needs to be retained to also include the email's metadata. This procedure documents how to properly retain an email and the email's metadata to adhere to records management guidelines. Refer to the Records Management section on the Spirion page that includes additional links to the state records management program that has Email Management guidelines and FAQs.

You will first flag emails that need to move into the Protective Enclave that is stored in your mailbox (or in an Outlook Data File *.psts). Then, you will save it as a .msg which retains the email and the email metadata. Additionally, you can also choose to save the message in a readable format (*.pdf). Finally, you will move both the .msg and the readable version into the Protective Enclave and remove it from the original location.

2.1. Flag email that contains DCL3 data

Emails found by a Spirion search located in your mailbox

After a Spirion email search, you may have matches that need to be moved into the Enclave.

The following process will make it easier to work with many emails that you will need to move into the Enclave. **If you only have 1 or 2 emails that you want to move into the Enclave, you can skip directly to step 2.3**

From the Spirion client, double click on the E-mail location that you will be retaining. The email will open in Outlook.

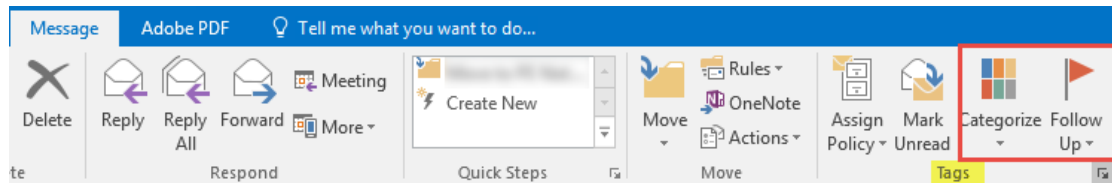Based on your preference, flag the message using either the Categorize or Follow Up options:
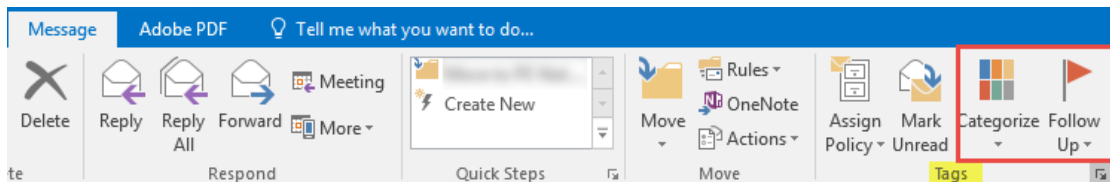
Note: You can use either one and customize how you desire, but know that Follow-up flags are not available for messages that are in the Deleted Items folder. Use Office help if you need additional help using Follow-up flags and categories.

Once you have flagged the message, close the window that contained the email message and move on to the next E-mail result listed in Spirion results. Continue to perform the same steps (flag the message using either Categories or Follow-up flags) until all messages have been flagged.

Emails identified by you located in your mailbox

A Spirion search is not the only way to locate emails that contain DCL3 data, you may also identify an email that contains DCL3 data that needs to be retained as you are reading your email. If you identify an email that contains DCL3 data and needs to be retained, based on your preference, flag the message using either the Categorize or Follow Up options:


Note: You can use either one and customize how you desire, but know that Follow-up flags are not available for messages that are in the Deleted Items folder. Use Office help if you need additional help using Follow-up flags and categories.

2.2. Create Search Folders to easily find flagged messages

From Outlook, you will locate flagged messages using "Search Folders" that search for your flagged messages. Here's how you create an Outlook search folder that will show you all the messages you have flagged:

➢ Locate "Search Folders" in your folder list.
➢ If you used Categories:
    a. Right click "Search Folders" and click "New Search Folder"
    b. Under **Organizing Mail** click "Categorized mail".
    c. Under "Show mail with these categories", select the category you used in the previous step to flag messages that contain DCL3 data and click OK.
    d. Under "Search Folders" right click the new search folder you just created and click "Show in Favorites"
➢ If you used Follow Up Flags:
    a. Before creating a new Search Folder, look to see if a "For Follow Up" folder already exists. If it does **not**, right click "Search Folders" and click "New Search Folder", under **Reading Mail** click "Mail flagged for follow up" and click OK.
    b. Under "Search Folders", right click the "For Follow Up" search folder and click "Show in Favorites"

The new Search Folder will show up under Search Folders with your messages filtered and easily available to take action on:
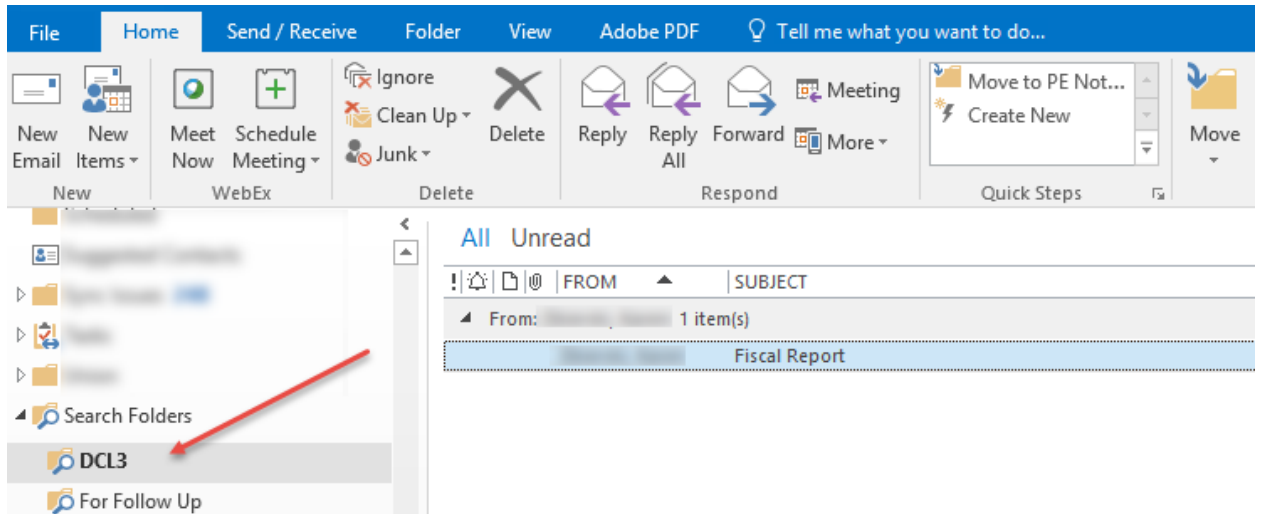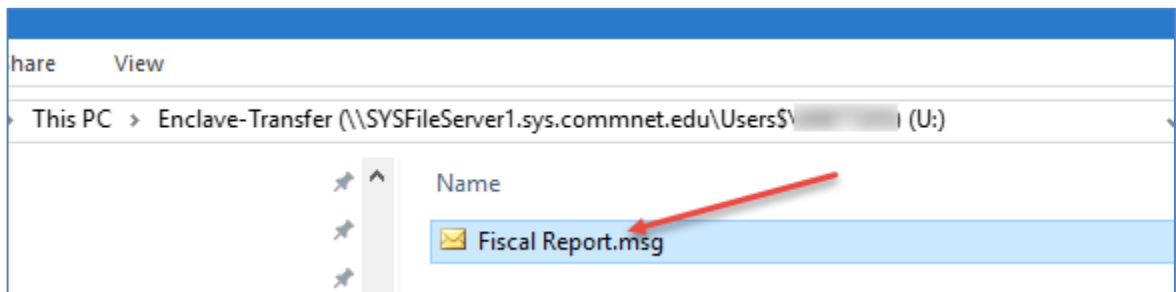
2.3.Properly retain the E-mail by saving as .msg

When you save an E-mail message as an .msg file, you are properly saving all the email's metadata associated with the email for record retention.
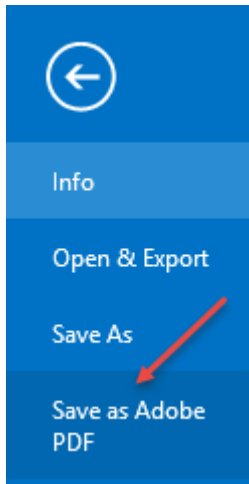
Navigate to each message, then click **File – Save As** to save each message as an .msg file.

Browse to your Enclave-Transfer folder and save the message (it uses the subject of the message):
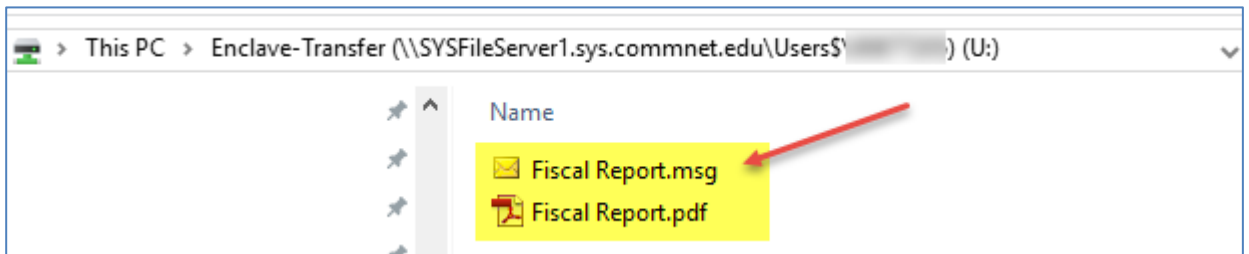

2.4. Save as other readable versions

If you wish to also save the message in a readable form, use the **File – Save As Adobe PDF**:

Browse to your Enclave-Transfer folder and save the message as a .pdf (it also uses the subject of the message):

Any attachments that contain DCL3 data will need to be saved in the Enclave-Transfer library to be moved into the Protective Enclave using **File - Save Attachments**:
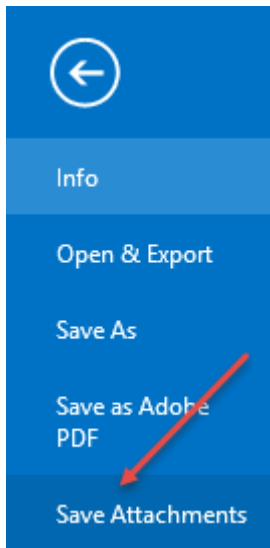
2.5. Move .msg and readable versions into the Protective Enclave and delete from mailbox

Finally, you will need to log into the Protective Enclave and move those files (.msg,.pdf and any attachments) from your Enclave-Transfer library to your Enclave-Docs library.

IMPORTANT: You must remember to do this step the same day you perform the other steps otherwise the files will be shredded at 2 AM every night and will be unrecoverable.

Verify that the file have been moved into your Enclave-Docs library.

After you have verified the files have been successfully moved into the Protective Enclave, you will then need to delete the email from your mailbox and should confirm they do not still reside in your Deleted Items folder by emptying your Deleted Items as well.
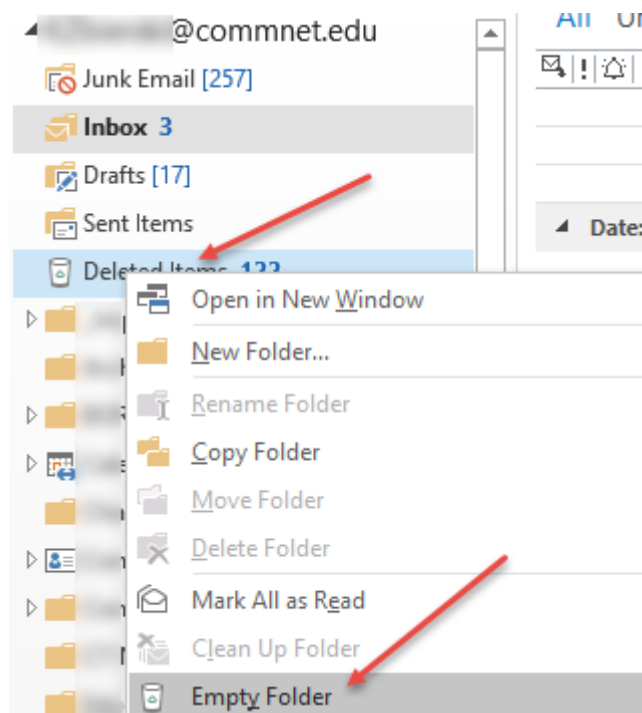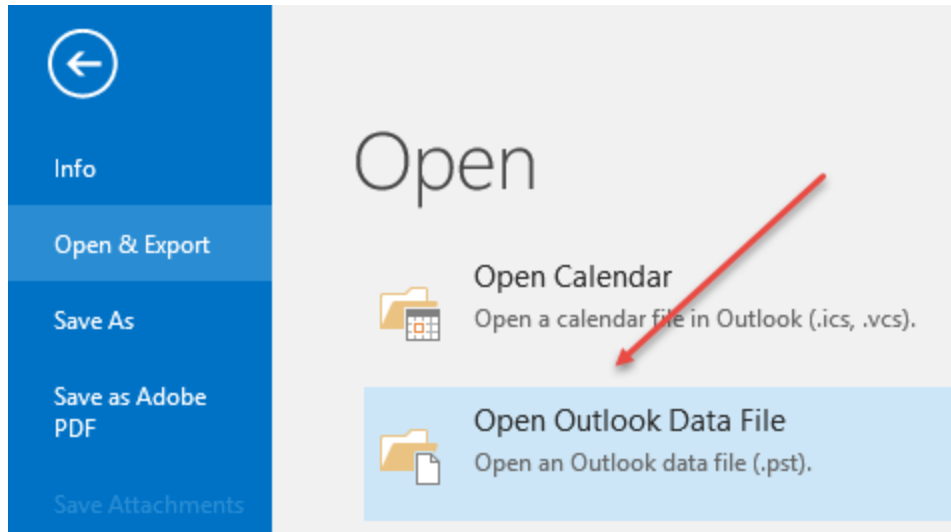

2.6. Additional instructions for mail in a DCL3.pst Outlook Data File

If you have emails in a DCL3.pst Outlook Data file you will need to move those emails to the Protective Enclave as well.
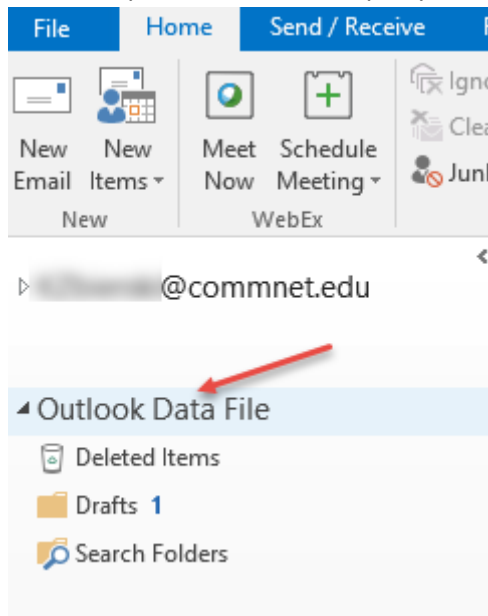
Open the DCL3.pst in your Outlook profile

From Outlook, click File – Open Outlook Data File:

Browse to the folder where the DCL3.pst is stored and select the DCL3.pst file.

The DCL3.pst will then show up in your folder list:

Perform steps 2.3 – 2.5

For each message you want to retain that is in your DCL3.pst Outlook Data File, you will be saving as .msg and optionally a .pdf and then moving all saved messages into the Protective Enclave.