

*Managing E-Mail  
Using  
Microsoft Outlook & Other Tools*





*Microsoft Outlook*

*Creating a Personal Folder*

**Kentucky**  
UNBRIDLED SPIRIT™











Mail

Favorite Folders

- Sent Items
- Deleted Items
- Inbox

All Mail Folders

- KASE
- KCA
- KDLA Building Security
- KDLA Personnel Schedules
- KDLA Website
- Kentucky Archives Month
- Legislation
- Letterhead
- Library Services
- Local Records
  - Hopkinsville Police Departmer
  - Kenton County Airport Board
  - Louisville Metro
- NARA
- NDIIPP
- NHPRC
- Personnel
  - Education
  - Health Insurance
  - Holidays
  - Other
  - Time & Attendance
  - Travel
- Presentations
  - Cabinet for Economic Develop

Personal Folders

From Subject Received Size

**Create New Folder**

Name:  
2009 - Regular Session

Folder contains:  
Mail and Post Items

Select where to place the folder:

- Help Desk
- KASE
- KCA
- KDLA Building Security
- KDLA Personnel Schedules
- KDLA Website
- Kentucky Archives Month
- Legislation
- Letterhead

OK Cancel





## *File Structure*

**Kentucky**  
UNBRIDLED SPIRIT™



# Sample Filing Structure for E-mail

## **NON-BUSINESS RELATED CORRESPONDENCE** (M0050 – Delete immediately)

 **Personal Messages**

 **“Spam”/ Unsolicited e-mail**

## **INFORMATIONAL AND REFERENCE MATERIAL** – (M0018) Delete when no longer useful.

 **Drafts** – Publications, Reports, Memos

 **Listserv Messages**

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## **TEMPORARY MESSAGES** – Delete per Retention Schedule

 **Routine Correspondence** (M0002 – delete after 2 years)

 Project 1

 Project 2

 Person A (Supervisor)

 Person B (Co-worker)

 **Activity Reports** (M0029 – delete after 3 years)

 Year #

 Jan, Feb, etc.

## **PERMANENT MESSAGES** – (As defined by retention schedules\* Check with agency records officer for appropriate filing procedures.)

 **Official Correspondence** (M0001 – usually from agency or division head)

 Project A

 Project B

 **Annual or Summary Reports** (M0022)

 **Policies and Procedures** (M0003)

 **Meeting Minutes** (M0008)





*Microsoft Outlook  
Auto Archiving*

**Kentucky**  
UNBRIDLED SPIRIT™



Send/Receive Find Address Book... Organize Rules and Alerts... Out of Office Assistant... Mailbox Cleanup... Empty "Deleted Items" Folder Recover Deleted Items... Forms Macro Speech E-mail Accounts... Customize... Options... E-mail Scan Properties... Scan for Viruses...

Send/Receive Find Type a contact to find

Subject Received

ye (KYO... 0681ORD1.doc Thu 10/19/2006 1:35 PM

(DLA) RE: Electronic Thu 10/19/2006 1:55 PM

ye (KYO... RE: CLE appr

ye (KYO... RE: CLE appr

ye (KYO... Emailing: defa

(DLA) 40XX Preserv

ye (KYO... FW: Govern

.com Westlaw E-m

A) Flu Shots

RE: [Karm] Q

RE: [Karm] Q

September 20

RE: [Karm] Q

Mark Myers Fw: [padiforu

McAninch, Glen (KDLA) RE: E-archive

Cundy, Jim (KDLA) FW: Records

Leach, Joan (KDLA) Open Enrollm

De Marcus, Nancy New member

@ Taylor, Carrie (KDLA) Weekly Wind

@ Robinson, Gwen (KDLA) Updated Tele

EDU Postmaster Personnel Me

**Date: Yesterday**

Mays, Karla (KDLA) Cindy Hamilto

Teague, Barbara (KDLA) Archives wee

Cundy, Jim (KDLA) Accepted: Up

Taylor, Carrie (KDLA) Another Bid I

McAninch, Glen (KDLA) RE: E-archive

Mays, Karla (KDLA) Donations: Cl

Houseal, Nancy (KDLA) Staff Develop

McAninch, Glen (KDLA) FW: Friends

**Date: Today**

Nancy Melley MARAC slides

Carrie Daniels Theme confirmation Wed 10/25/2006 9:43 AM

EDU Postmaster Trick-or-Treaters invited to mansion Wed 10/25/2006 9:50 AM

@ McAninch, Glen (KDLA) List of Records that are Candidates for Accessioning and Displ... Wed 10/25/2006 10:57 AM

Bensenhaver, Amye (KYO... November 28 SGBA presentation Wed 10/25/2006 12:50 PM

Bensenhaver, Amye (KYO... RE: November 28 SGBA presentation Wed 10/25/2006 12:57 PM

@ Cundy, Jim (KDLA) SGBA Presentation Wed 10/25/2006 1:12 PM

436 Items

start

Inbox - Microsoft Out... My Bookmarks - Mozil... E-mail mgmt\_06 SGBA 28 Nov 06 1:20 PM

### Options

AutoArchive

Run AutoArchive every 14 days

Prompt before AutoArchive runs

During AutoArchive:

- Delete expired items (e-mail folders only)
- Archive or delete old items
- Show archive folder in folder list

Default folder settings for archiving

Clean out items older than 24 Months

Move old items to:  
 U:\mmyers\exchange\MMyers\_archive Browse...

Permanently delete old items

Apply these settings to all folders now

To specify different archive settings for any folder, right-click on the folder and choose Properties, then go to the AutoArchive tab.

Retention policy

The network administrator has not set retention policies.

Retention Policy Information...

OK Cancel

## Microsoft Office Outlook



Would you like to AutoArchive your old items now?

AutoArchive moves items that you haven't used in a long time to the archive file U:\aterry\ARCHIVE\archive.pst. This is necessary to improve performance and to prevent your mailbox from growing too large. You can find archived items in the Archive Folders located in the folder list.

Don't prompt me about this again.

AutoArchive Settings...

Yes

No



start



Inbox - Microsoft ...

Kentucky Legislatu...

Microsoft PowerP...

Google



12:04

Wednesday

# AutoArchive



Run AutoArchive every  days

Prompt before AutoArchive runs

### During AutoArchive:

Delete expired items (e-mail folders only)

Archive or delete old items

Show archive folder in folder list

### Default folder settings for archiving

Clean out items older than  Months

Move old items to:

Browse...

Permanently delete old items

Apply these settings to all folders now

To specify different archive settings for any folder, right-click on the folder and choose Properties, then go to the AutoArchive tab.

### Retention policy



The network administrator has not set retention policies.

Retention Policy Information...

OK

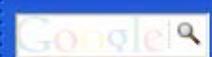
Cancel



Inbox - Microsoft ...

Kentucky Legislatu...

Microsoft PowerP...



12:05  
Wednesday

**Mail**

Favorite Folders

- Inbox
- Unread Mail
- For Follow Up [2]
- Sent Items
- Deleted Items (71)
- Drafts [27]
- Outbox

All Mail Folders

- Mailbox - Myers, Mark (KDLA)
  - Deleted Items (71)
  - Drafts [27]
  - Inbox
  - Infected
  - Junk E-mail
  - Outbox
  - Quarantine
  - Sent Items
  - Search Folders
  - Archive Folders
  - Personal Folders
  - Associations
  - ARMA
    - Open
    - Open in New Window
    - Send Link to This Folder
    - Advanced Find...
    - Move "ARMA"...
    - Copy "ARMA"...
    - Delete "ARMA"
    - Rename "ARMA"...
    - New Folder...
    - Add to Favorite Folders
    - Mark All as Read
    - Process All Marked Headers
    - Process Marked Headers
    - Sharing...
    - Properties
- KCA
- SAA
- aje
- Delete
- E-m
- Minr
- NAG
- NAR
- Ott
- Email Te
- Gen

**Calendar**

**Contacts**

436 Items

**Inbox**

From	Subject	Received
Bensenhaver, Amye (KYO...	0681LORD1.doc	Thu 10/19/2006 1:35 PM
McAninch, Glen (KDLA)	RE: Electronic Files	Thu 10/19/2006 1:50 PM
Bensenhaver, Amye (KYO...	RE: CLE approval for SGBA presentation	Thu 10/19/2006 2:18 PM
Bensenhaver, Amye (KYO...	RE: CLE approval for SGBA presentation	Thu 10/19/2006 2:22 PM
Bensenhaver, Amye (KYO...		
McAninch, Glen (KDLA)		
Bensenhaver, Amye (KYO...		
westlaw@westlaw.com		
Steinle, Beth (KDLA)		
McGee, Sharon		
Chadwick Owen		
Nancy Allard		
McGee, Sharon		
<b>Date: Sunday</b>		
Nelson, Jim A (KDLA)		
<b>Date: Monday</b>		
Mark Myers		
McAninch, Glen (KDLA)		
ndy, Jim (KDLA)		
ch, Joan (KDLA)		
Marcus, Nancy		
lor, Carrie (KDLA)		
pinson, Gwen (KDLA)		
J Postmaster		
<b>Yesterday</b>		
ys, Karla (KDLA)		
ague, Barbara (KDLA)		
ndy, Jim (KDLA)		
lor, Carrie (KDLA)		
Aninch, Glen (KDLA)		
ys, Karla (KDLA)		
useal, Nancy (KDLA)		
Aninch, Glen (KDLA)		
<b>Today</b>		
ncy Melley	MARAC slides	Wed 10/25/2006 9:35 AM
Carrie Daniels	Theme confirmation	Wed 10/25/2006 9:43 AM
EDU Postmaster	Trick-or-Treaters invited to mansion	Wed 10/25/2006 9:50 AM
McAninch, Glen (KDLA)	List of Records that are Candidates for Accessioning and Displ...	Wed 10/25/2006 10:57 AM
Bensenhaver, Amye (KYO...	November 28 SGBA presentation	Wed 10/25/2006 12:50 PM
Bensenhaver, Amye (KYO...	RE: November 28 SGBA presentation	Wed 10/25/2006 12:57 PM
Cundy, Jim (KDLA)	SGBA Presentation	Wed 10/25/2006 1:12 PM

**ARMA Properties**

General Home Page AutoArchive Administration Forms

Do not archive items in this folder

Archive items in this folder using the default settings

Default Archive Settings...

Archive this folder using these settings:

Clean out items older than 3 Months

Move old items to default archive folder

Move old items to:

U:\mmyers\exchange\MMyers\_archive Browse...

Permanently delete old items

Retention policy

The network administrator has not set retention policies.

Retention Policy Information...

OK Cancel Apply



*Microsoft Outlook*  
*Setting Rules*

**Kentucky**  
UNBRIDLED SPIRIT™



SB0127 - Message (Plain Text)



File Edit View Insert Format Tools Actions Help Adobe PDF

Reply Reply to All Forward

- Follow Up
- Create Rule...
- Junk E-mail

You replied on 2/13/2009 8:38 AM.

From: COT SQL Service  
 To: Terry, Audrey (KDLA)  
 Cc:  
 Subject: SB0127

Sent: Fri 2/13/2009 8:30 AM

Notice! SB0127 has been assigned to your UserID, aterry, in the KLR System. Log in with that User ID and refer to your WorkBasket to view this assignment.

From:  
<mailto:laurent.rawlings@ky.gov>



- 2009 - Regu...
- Kentucky Le...
- State Gover...
- 2009 E-mail...
- 2009 Email ...
- Presentation1
- SB0127 - M...



12:38  
 Wednesday

You replied on 2/13/2009 8:38 AM.

From: COT SQL Service Sent: Fri 2/13/2009 8:30 AM  
To: Terry, Audrey (KDLA)  
Cc:  
Subject: SB0127

Notice! SB0127 has been assigned to your system. Log in with that User ID and refer to your Workstation ID.  
From: <mailto:laurent.rawlings@ky.gov>

### Create Rule

When I get e-mail with all of the selected conditions

- From COT SQL Service
- Subject contains SB0127
- Sent to me only

Do the following

- Display in the New Item Alert window
- Play a selected sound: Windows XP Notify.w [Browse...]
- Move e-mail to folder: Infonomics Weekly Pl [Select Folder...]

OK Cancel Advanced Options...

You replied on 2/13/2009 8:38 AM.

From: COT SQL Service Sent: Fri 2/13/2009 8:30 AM  
To: Terry, Audrey (KDLA)  
Cc:  
Subject: SB0127

Notice! SB0127 has been assigned to your system. Log in with that  
User ID and refer to your Web page.

From:  
<mailto:laurent.rawlings@ky.gov>

### Rules and Alerts

Choose a folder:

- Folder: KCA
- Folder: KDLA Building Security
- Folder: KDLA Personnel Schedules
- Folder: KDLA Website
- Folder: Kentucky Archives Month
- Folder: Legislation
  - Folder: 2008 - Special Session
  - Folder: 2009 - Regular Session
- Folder: Letterhead
- Folder: Library Services
- Folder: Local Records
- Folder: NARA

OK Cancel New...

You replied on 2/13/2009 8:38 AM.

From: COT SQL Service Sent: Fri 2/13/2009 8:30 AM  
To: Terry, Audrey (KDLA)  
Cc:  
Subject: SB0127

Notice! SB0127 has been assigned to you. Please refer to your Work Item ID and refer to your Work Item ID in the system. Log in with that

From:  
<mailto:laurent.rawlings@ky.gov>

### Create Rule

When I get e-mail with all of the selected conditions

- From COT SQL Service
- Subject contains SB0127
- Sent to me only

Do the following

- Display in the New Item Alert window
- Play a selected sound: Windows XP Notify.w
- Move e-mail to folder: 2009 - Regular Sessic

OK Cancel Advanced Options...



- Rules and Alerts...
- Out of Office Assistant...
- Mailbox Cleanup...
- Empty "Deleted Items" Folder
- E-mail Accounts...
- Customize...
- Options...

Mail

Favorite Folders

- Sent Items
- Deleted Items
- Inbox

All Mail Folders

- Kentucky Board of Physical Therapy
- Kentucky Board of Physical Therapy
- Kentucky Department of Agriculture
- Kentucky Department of Mental Health
- Kentucky Retirement System
- KY Housing Corp.
- Justice & Public Safety
  - Department of Corrections
    - Division of Probation and Parole
    - Office of Drug Control Policy
    - Office of General Counsel
  - Department of Juvenile Justice
  - Kentucky State Police
  - Office of Drug Control Policy
- Labor Cabinet
- Personnel Cabinet
- Public Protection Cabinet
  - Department of Charitable Organizations
  - Department of Financial Institutions
  - Department of Housing and Community Development
  - Department of Insurance
  - Department of the Alcohol and Tobacco Commission
  - Kentucky Board of Tax Appeals
  - Kentucky Horse Racing Authority

Subject	Received	Size
... KDF seedling sale	Wed 3/11/2009 11:12 AM	97 KB
... GeoMAAP appraisal conference call	Wed 3/11/2009 10:10 AM	4 KB
... RE: Heads up!	Tue 3/10/2009 2:27 PM	5 KB
... Heads up!	Tue 3/10/2009 1:56 PM	5 KB
@ Chisman, Jane... FW: [Kylibdir] RE: follow up on library license plate	Wed 3/4/2009 8:18 AM	107 KB

@ Chisman, Jane... FW: [Kylibdir] RE: follow up on library license plate

5 Items

Online



Inbox - Microsoft ... Kentucky Legislatu... State Government...

2009 E-mail Mana... Microsoft PowerP...



12:24  
Wednesday

# Inbox

- Folders
- Deleted Items
  - Inbox
  - Outgoing Mail
  - Spam
  - Tracked Changes
  - Deleted Items
  - Discovery
  - Space
  - Electronic Records Retention
  - Electronic Signatures
  - E-mail Policy Model for Kentu...
  - MCAP
  - NRWG
  - Glen
  - Governor's Messages
  - Help Desk
  - CASE
  - DLA Personnel Schedules
  - DLA Website
  - Kentucky Archives Month

### Rules and Alerts

E-mail Rules

- New Rule
- Rule (1)
- NASA
- Hewlett-Packard
- Government
- AIIM
- AIIM
- COT SQL Service
- COT SQL Service
- WebEx

Rule description

Apply this rule after the message arrives from COT SQL Service and on this machine only move it to the 2010 - Regular Session folder

## Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

- with specific words in the subject or body
- with specific words in the message header
- with specific words in the recipient's address
- with specific words in the sender's address
- assigned to category category
- which is an Out of Office message
- which has an attachment
- with a size in a specific range
- received in a specific date span
- uses the form name form
- with selected properties of documents or forms
- sender is in specified Address Book
- which is a meeting invitation or update

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives from COT SQL Service and on this machine only move it to the 2010 - Regular Session folder

Buttons: Cancel, < Back, Next >, Finish

Received	Size
Mon 8/3/2009 11:03 AM	8 KB

e-mail correspondence. The basics. I'll send you a copy of

Thank you,  
Jim

- mail**
- Favorite Folders
- Sent Items
  - Inbox
- Mail Folders
- Mailbox - Terry, Audrey (KDLA)
    - Deleted Items
    - Drafts
    - Inbox
    - Junk E-mail
    - Outbox
    - Quarantine
    - Sent Items
    - Search Folders
  - Archive Folders
  - Personal Folders
    - Deleted Items
    - EMCAP
    - ERWG
    - KDLA Personnel Schedules
    - Legislation**
    - Local Records
    - NDIIPP
    - Presentations
    - State Agencies
    - State Archive and Records Commission
    - Universities
    - Search Folders

**Inbox**

From	Subject	Received	Size
Compton, Pa...	Latest news on budget cuts in today's Herald Leader - Guess I'm not ...	Fri 8/28/2009 7:21 AM	9 KB
@ Steinle, Beth ...	Exit checklist	Wed 8/19/2009 8:59 AM	45 KB

**Latest news on budget cuts in today's Herald Leader - Guess I'm not up on the latest!**

Compton, Pam (KDLA)

To: Terry, Audrey (KDLA); Snapp, Cynthia (KDLA); Smith, Sunnye (KDLA); Arnold, Jackie (KDLA)

- [bmusgrave@herald-leader.com](mailto:bmusgrave@herald-leader.com)

FRANKFORT — Most state agencies can expect a 4 percent cut to their budgets to make up a projected shortfall for the fiscal year that began July 1, the state budget director told a legislative committee on Thursday.

Mary Lassiter told the Interim Joint Committee on Appropriations and Revenue that the main funding formulas for K-12 education, universities, the Medicaid program, mental health services, state police and Kentucky Educational Television will escape the reduction that most other agencies will suffer.

The cuts are preliminary. But it is estimated that the 4 percent cut will save the state about \$80 million.

Mail

Favorite Folders

Sent Items

Inbox

Mail Folders

Mailbox - Terry, Audrey (KDLA)

Deleted Items

Drafts

Inbox

Junk E-mail

Outbox

Quarantine

Sent Items

Search Folders

Archive Folders

Personal Folders

Deleted Items

EMCAP

ERWG

KDLA Personnel Schedules

Legislation

2008 - Special Session

2009 - Regular Session

2009 - Special Session (1)

2010 - Regular Session

Local Records

NDIIPP

Presentations

State Agencies

State Archive and Records Commission

Inbox

From	Subject	Received	Size
Compton, Pa...	Latest news on budget cuts in today's Herald Leader - Guess I'm not ...	Fri 8/28/2009 7:21 AM	9 KB
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The cuts are preliminary. But it is estimated that the 4 percent cut will save the state about \$80 million.

ms

start



Inbox - Microsoft ...

Recorded Present...

Kentucky: Depart...

Microsoft PowerP...

Onlin



12:39 P



*Other Tips*

**Kentucky**  
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# Tips

- Empty your Delete folder at end of the day
- Make Records Management a Daily activity
- Limit Messages to one topic
- Subject Line should follow the subject
- Limit attachments, send hyperlinks when available
- Don't mix personal correspondence with business correspondence on same record
- Follow your retention schedule and get rid of record when retention period expires

# E-mail Resources

- KDLA website: [www.kdla.ky.gov](http://www.kdla.ky.gov)
- Understanding E-mail page:
  - <http://www.kdla.ky.gov/recmanagement/tutorial/email.htm>
  - Guideline for Managing E-mail in KY Government
  - Internet and E-mail Acceptable Use Policy (CIO-060)
  - Model Policy and Procedure for the Management of Electronic Mail in Kentucky Agencies
  - Storage of E-mail Messages using Outlook



Phone: 502-564-8300