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

Creating a Personal Folder

Kentucky
UNBRIDLED SPIRIT
File Structure
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

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
AutoArchiving

Kentucky
UNBRIDLED SPIRIT
™
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:\Berry\ARCHIVE\archive.asc. 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
ARMA Properties

[Tabbed settings:
- General
- Home Page
- AutoArchive
- Administration
- Forms

For AutoArchive:
- Do not archive items in this folder
- Archive items in this folder using the default settings

Archive this folder using these settings:
- Clean out items older than [input field]
- Move old items to default archive folder
- Move old items to [input field]
- Permanently delete old items

Retention policy:
The network administrator has not set retention policies.

[Buttons: OK, Cancel, Apply]
Microsoft Outlook

Setting Rules

Kentucky
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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
Notice! SB0127 has been assigned to you.
User ID and refer to your

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

From: mailto: laurent.rawlings@ky...
Notice! SB0127 has been assigned to your User ID and refer to your

From: mailto:laurent.rawlings@ky.

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.wav
- Move e-mail to folder: 2009 - Regular Sessc

OK Cancel Advanced Options...
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 data 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

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

Apply the rule description (click an underlined value)

Cancel Next > Finish
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, Sunuye (KDLA); Arnold, Jackie (KDLA)

- bmusgrave@herald-leader.com

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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.
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Other Tips
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
- Understanding E-mail page:
  - 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

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