

UVU Email Retention Ideas

Utah State Archives Conference

October 6, 2016



Agenda

- ▶ About UVU Email
- ▶ Outlook and Exchange Features
- ▶ Ideas for Retaining Email Records
- ▶ Questions



About UVU Email



A Brief History of Email at UVU

- ▶ VAX and WordPerfect Office, Limited Internet Messaging (@1990–1994)
- ▶ GroupWise (1994–2010)
- ▶ Outlook/Exchange (2010–Present)



Outlook and Exchange Features



Exchange vs. Outlook

- ▶ Server
- ▶ Databases
- ▶ Policies
- ▶ System-wide Settings
- ▶ Storage
- ▶ Client (Many Platforms)
- ▶ Messages
- ▶ Folders
- ▶ Personalized Settings
- ▶ Access

Exchange

Outlook

Exchange Features

- ▶ Online Archive
- ▶ Archive and Retention Policies
- ▶ No Auto-Forwarding
- ▶ Quotas
- ▶ Litigation Holds
- ▶ System-Wide Search
- ▶ Recycle Bin



Outlook Features

- ▶ Folders
- ▶ Sent Items
- ▶ Rules (Client side vs. Server side)
- ▶ Quick Steps
- ▶ Categories
- ▶ Sort
- ▶ Filters
- ▶ Search
- ▶ Deleted Items



Active Directory Settings

- ▶ Group Policy
 - No PSTs Allowed



Archive and Retention Policies

1. Wait for specified age of message
2. Move message to online archive

1. Wait for specified age of message
2. Remove message from mailbox or from online archive

Archive

Retention

Ideas for Retaining Email Records

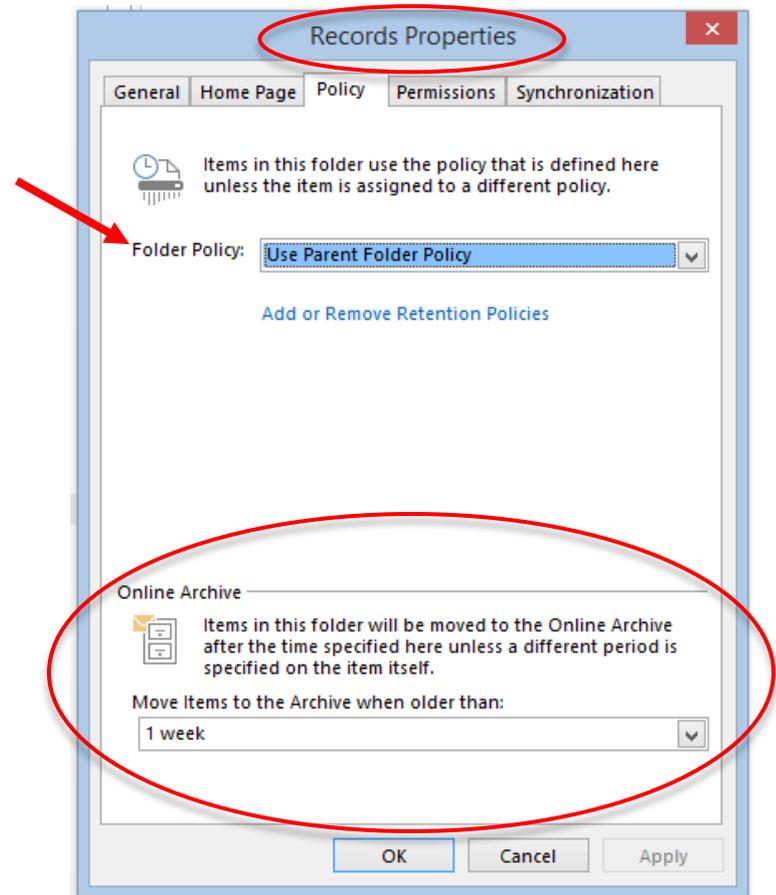


Folder Structure, Policies

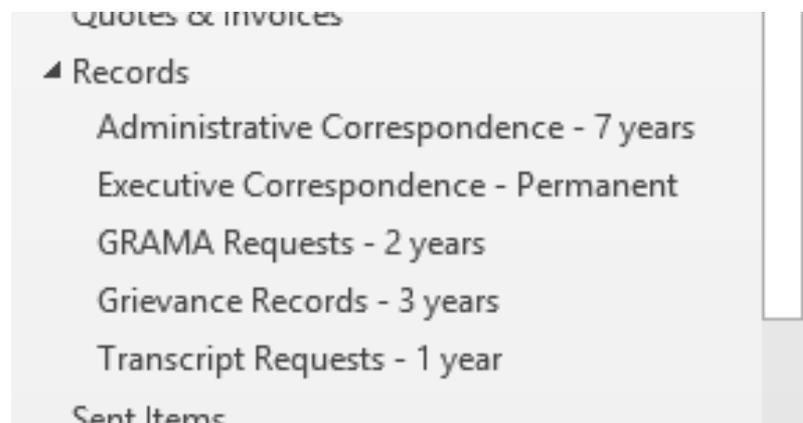
- ▶ Impose Small Quotas
- ▶ Move Messages to Appropriate Folders
 - Manually
 - Quick Steps
 - Rules
 - DON'T FORGET SENT ITEMS
- ▶ Mailbox Folder has a Short Term Archive Policy
- ▶ Each Archive Folder has an Appropriate Retention Policy



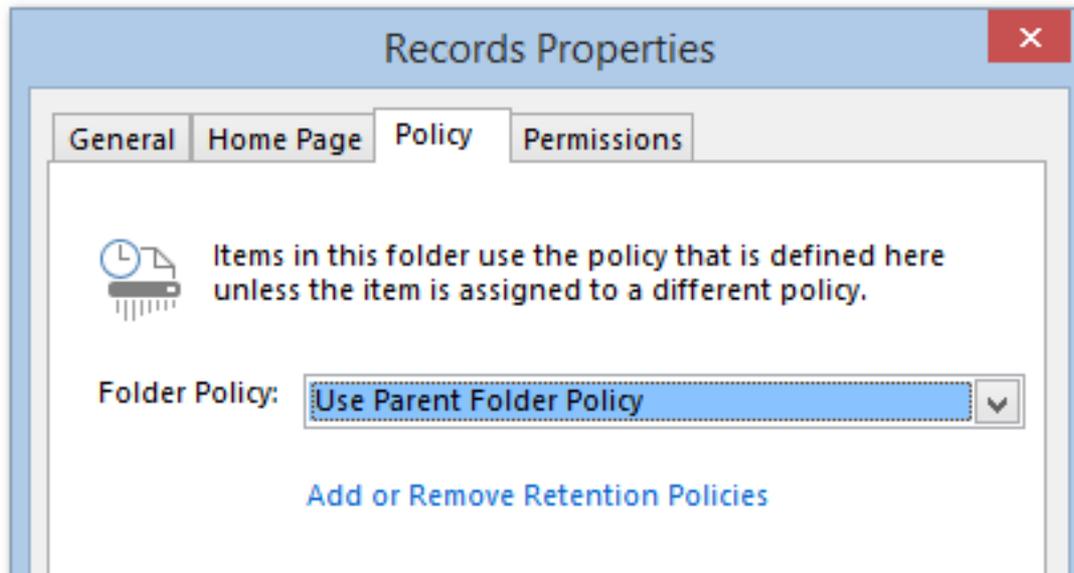
Mailbox Folder Structure



Archive Folder Structure



Archive Folder – Records



Administrative Correspondence

 Reply  Reply All  Forward



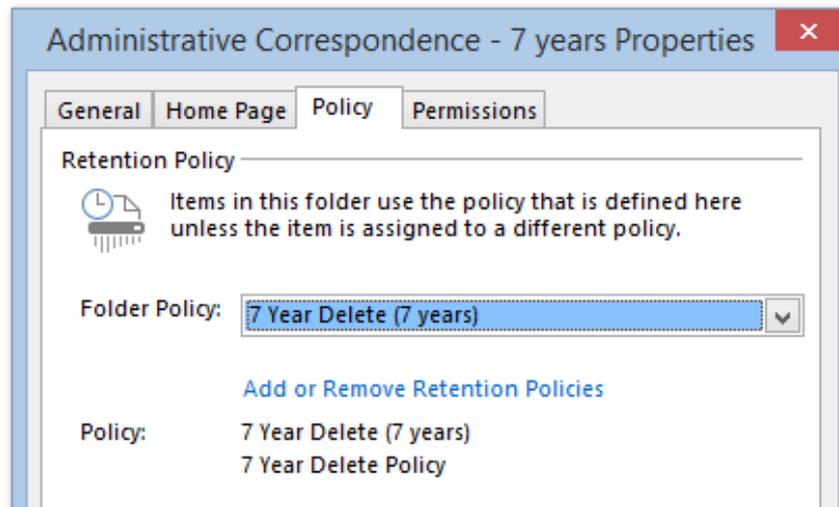
Fri 9/2/2016 5:35 PM

Brett McKeachnie

Administrative Correspondence

To Brett McKeachnie

This is Administrative Correspondence. It was sent by me. It must be kept for 7 years.



Executive Correspondence

 Reply  Reply All  Forward



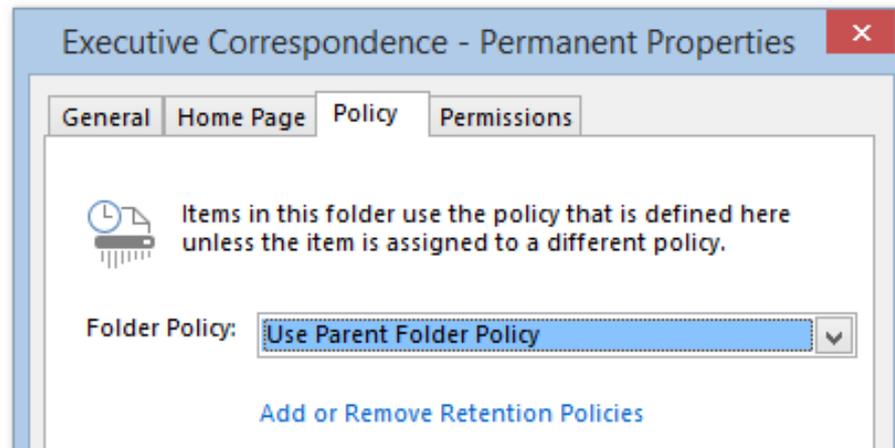
Fri 9/2/2016 5:35 PM

Brett McKeachnie

Executive Correspondence

To Brett McKeachnie

This is Executive Correspondence. It was sent by me. It must be kept permanently.



GRAMA Requests

 Reply  Reply All  Forward



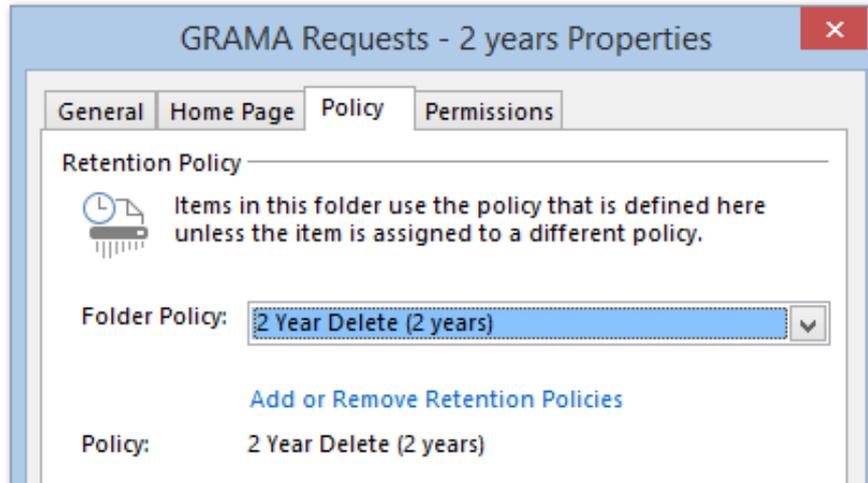
Fri 9/2/2016 5:34 PM

Brett McKeachnie

GRAMA Request

To Brett McKeachnie

This is a GRAMA request. It should be kept for 2 years.



GRAMA Requests - 2 years Properties

General Home Page Policy Permissions

Retention Policy

 Items in this folder use the policy that is defined here unless the item is assigned to a different policy.

Folder Policy: **2 Year Delete (2 years)**

[Add or Remove Retention Policies](#)

Policy: 2 Year Delete (2 years)



Grievance Records

 Reply  Reply All  Forward



Fri 9/2/2016 5:34 PM

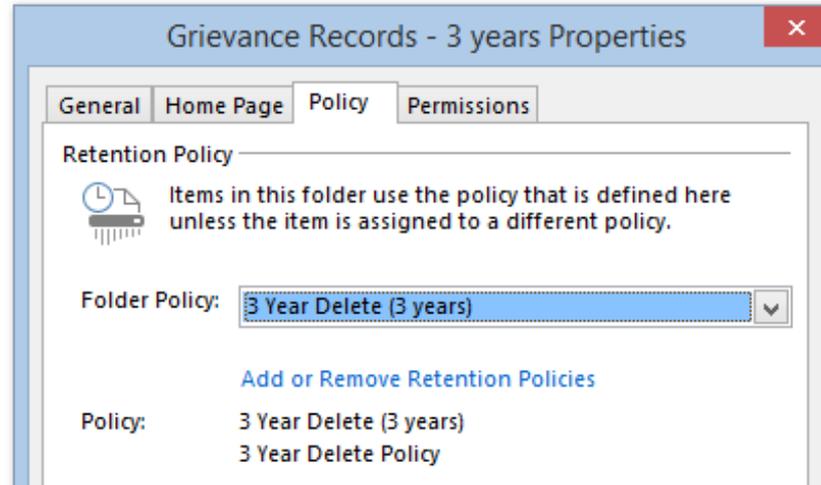
Brett McKeachnie

Grievance

To Brett McKeachnie

Retention Policy 3 Year Delete (3 years)

This is a grievance. It should be kept for 3 years.



Transcript Requests

 Reply  Reply All  Forward



Fri 9/2/2016 5:33 PM

Brett McKeachnie

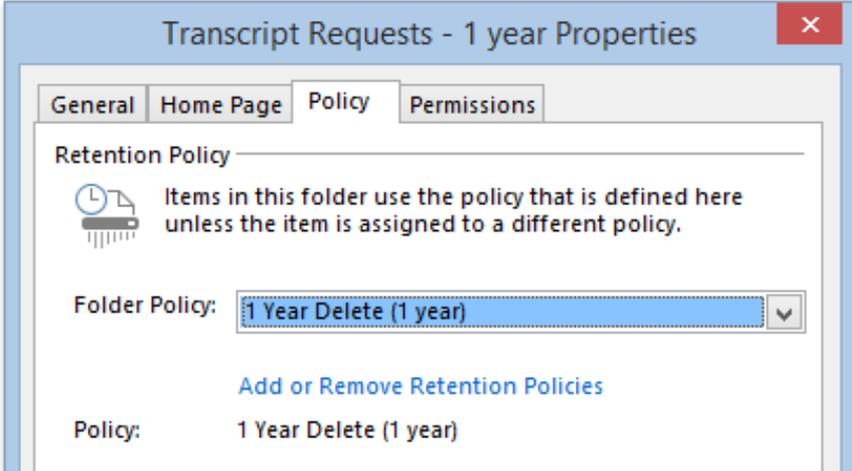
Transcript Request

To Brett McKeachnie

Retention Policy 1 Year Delete (1 year)

Expires 9/2/2017

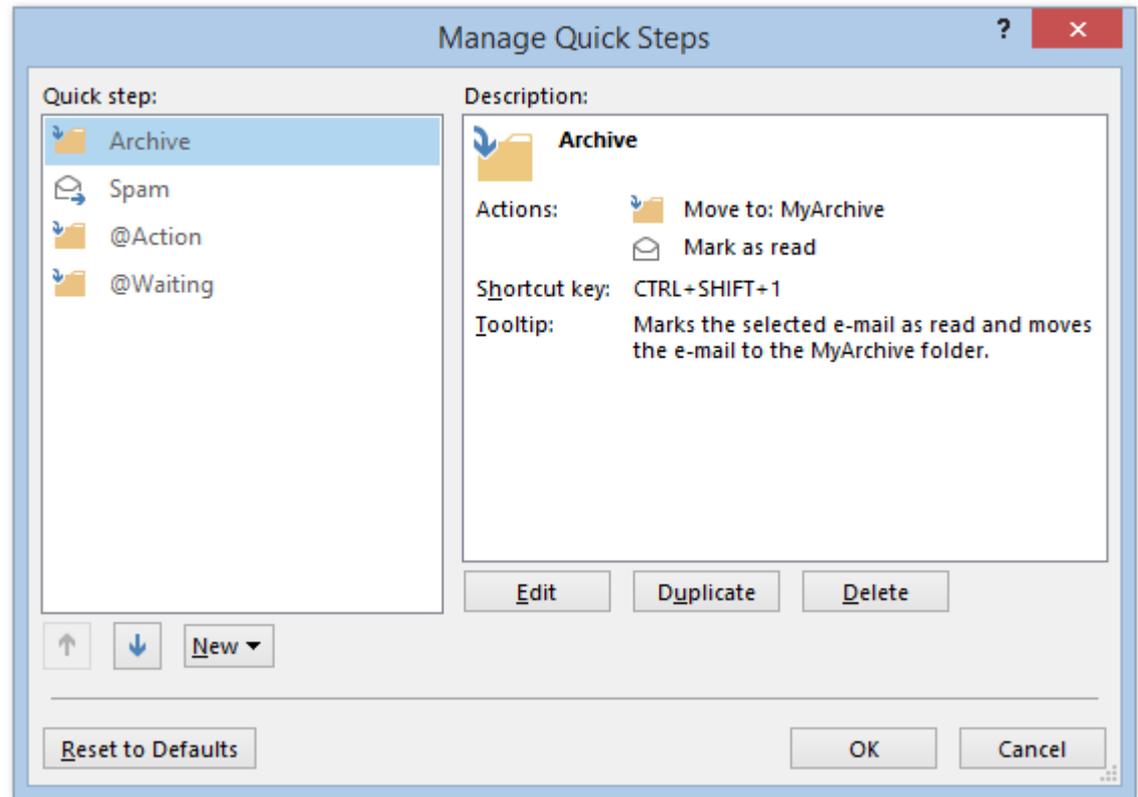
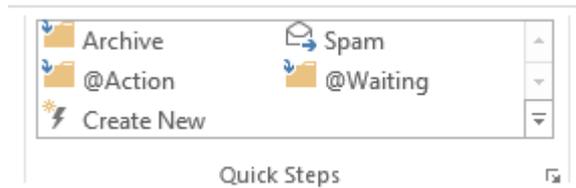
This is a transcript request. It should be kept for 1 year, then destroyed.



The screenshot shows a dialog box titled "Transcript Requests - 1 year Properties" with a close button (X) in the top right corner. It has four tabs: "General", "Home Page", "Policy", and "Permissions". The "Policy" tab is selected. Under the "Retention Policy" section, there is a clock icon and a document icon with the text: "Items in this folder use the policy that is defined here unless the item is assigned to a different policy." Below this, the "Folder Policy:" is set to "1 Year Delete (1 year)" in a dropdown menu. At the bottom, there is a link "Add or Remove Retention Policies" and the "Policy:" is listed as "1 Year Delete (1 year)".



Quick Steps



Search / Filter / Policy

The screenshot shows the Microsoft Outlook ribbon with the **SEARCH** tab selected. The ribbon is divided into several sections:

- Scope:** Includes 'All Mailboxes', 'Current Mailbox', and 'All Outlook Items'.
- Results:** Includes 'Include Older Results'.
- Refine:** Includes filters for 'From', 'Subject', 'Has Attachments', 'Categorized', 'This Week', 'Sent To', and 'Unread'.
- Options:** Includes 'Flagged', 'Important', 'More', 'Recent Searches', 'Search Tools', and 'Close Search'.

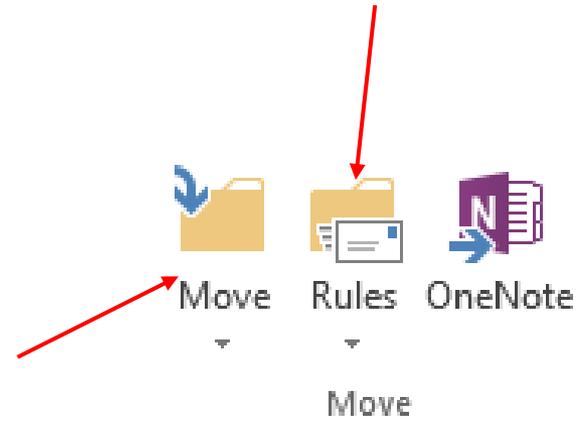
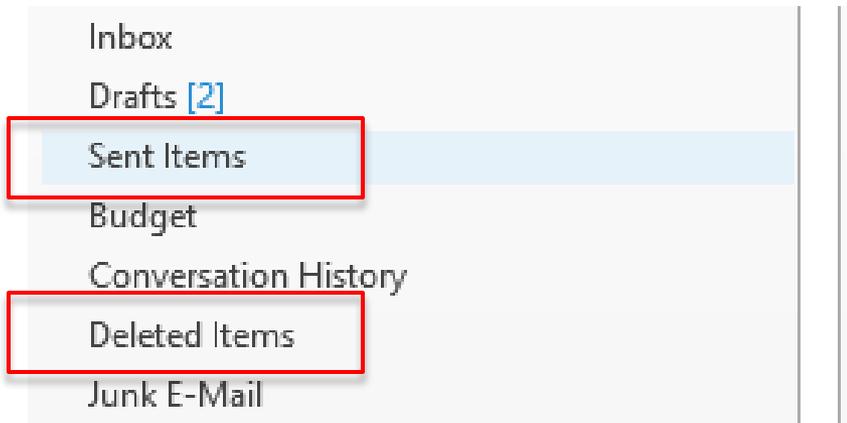
The search bar at the top right contains the text 'ray walker' and is highlighted with a red arrow. Below the search bar, there are icons for 'Reply', 'Reply All', and 'Close'.

This close-up shows a section of the Outlook ribbon with the following buttons:

- Assign Policy**: This button is circled in red.
- Unread/Read**: A button with an envelope icon.
- Categorize**: A button with a multi-colored square icon.
- Follow Up**: A button with a red flag icon.
- Search People**: A search box.
- Address Book**: A button with a list icon.
- Filter Email**: A button with a funnel icon, highlighted with a red arrow.
- Find**: A button with a magnifying glass icon.



Don't Forget



Questions?



GVU

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