Email Records Management - Part 2

How to Use Your Records Retention Folders
Introduction

This lesson is a step-by-step tutorial on how to use the records retention folders in Outlook 2016. This tutorial presents recommended methods for managing email records.

To determine the categories and retention period for email records, consult the Records Retention Schedules in the Records Retention Guide.
Objectives

After watching this tutorial, you will know how to perform the following procedures:

• Create project folders
• Create and assign color categories
• Move messages into a project folder
• Filter messages by color categories
• Move messages into an email retention folder
• Set a recurring reminder
• Delete messages when the minimum retention period has passed
Each project should have its own folder where you store emails related to the project until the project is completed.

The Outlook folder pane is customizable, so you can add folders in the inbox as needed, as shown here.
Create Project Folders

To create a project folder, right-click **Inbox** in the folder pane in Outlook, and choose New Folder...

Type a name for the folder and press the **Enter** key on your keyboard.
To speed the process when it’s time to move records to the appropriate retention folders, you should consider categorizing emails as you receive them.

To create Color Categories, click the **Categorize** button on the **Home** tab, and choose **All Categories**...
In the **Color Categories** window, click the **New...** button.

In the **Add New Category** window, name the new category **1 Year Retention**, choose a color, and click the **OK** button.
Color Categories

Repeat the steps to assign color categories for the other four retention folders, and then click the OK button.

NOTE: When you create a new Category, the box next to it is automatically checked and will apply to whichever email was selected when you clicked the Categorize button. Uncheck all boxes before clicking OK.
Color Categories

Assign a category to an email by right-clicking the message, hovering Categorize, and choosing the appropriate category.

Click Clear All Categories if you’ve accidentally applied an incorrect category to a message.
Move Emails into Project Folders

When you want to move an email into a project folder, simply drag the email from the list pane to the project folder in the folder pane. Release the mouse button when the appropriate folder is highlighted.
Move Emails into Project Folders

You can move multiple files at once: Press the Ctrl key as you click each email to select multiple messages. Then simply click, hold, and drag one of the highlighted messages into the appropriate folder to move all of the selected messages.
Managed Folders

Earlier versions of Outlook (before Outlook 2016) applied a strikethrough to emails that had reached the minimum retention date of the folder they were placed in.

That functionality is gone, but Managed Folders are still included in the folder pane, so you can continue to use them. You will have to manage deletion manually, and we will describe recommended practices in the next steps.
Click the Managed Folders arrow icon to reveal the Email Records - __ Year Retention folders.
We recommend creating subfolders under each retention folder to organize the emails they contain.

This will make it simple to find only the emails that are ready to be deleted once they reach maturation.
Create Year and Month Subfolders

Each month you will check to see if any emails have reached the minimum retention time. Since retention time is not based on the date of the email, it is necessary to store the emails in folders that are labeled by the date in which a project was completed.

For each **Email Records - ____ Year Retention** folder, create subfolders labeled with the year, and for each year-labeled subfolder, create subfolders labeled with the month.
Copy Year and Month Subfolders

TIP: Once you’ve created a Year subfolder with Month subfolders nested within it, you can right-click the Year folder and choose Copy Folder.

NOTE: If any of the folders contain emails, the emails will be copied as well, so it’s best to perform these steps on newly-created, empty folders.
In the **Copy Folder** window, select the folder into which you want to paste the copied subfolders.

Click the **OK** button.
Move emails into Retention Folders

When a project is complete, emails related to that project should be moved into the appropriate retention folders.

If you categorized emails as they came in, the following steps will make this process fast and easy.
In this example, we will move records that must be retained for 1 year. Begin by creating a project subfolder as directed below.

The project ended in November of 2016, so we will create a Project X subfolder in Managed Folders ➤ Email Records – 01 Year Retention ➤ 2016 ➤ November.
Filter Emails by Category

Select the appropriate project folder (where all project emails were kept before the project ended).

Click the Filter Email button on the Home tab, hover Categorized, and choose the appropriate category from the list.
Filter Emails by Category

The box above the email list displays the currently applied filter, and only records marked with that category are listed.
Select Filtered Records

To select all currently-filtered emails, click the first email in the list, hold the Shift key, and click the last email in the list.
Move Filtered Records

Click, hold, and drag the selected emails to the new project subfolder under the appropriate Managed Folders subfolder.

In this case, move records to:
- Email Records – 01 Year Retention
  - 2016
  - November
  - Project X
Move Filtered Records

While the filter is still in place, the folder will appear to be empty after you’ve moved the filtered emails to the appropriate retention folder.

Click the x in the filter field to remove the filter and reveal emails with other categories assigned to them, and then repeat the steps to filter for the next retention category.
Set Recurring Reminder

We recommend that you set a recurring task in Outlook to remind yourself each month to delete emails that have reached the minimum retention duration.

The following steps describe the procedure for creating a recurring task.
Set Recurring Reminder

Click the Tasks icon in the lower left corner of Outlook 2016.
Click the **New Task** button on the Home tab to open the New Task dialog.
Set Recurring Reminder

Type “Check Retention Folders” in the Subject field, and then click the **Recurrence** button in the Task tab.
Set a monthly recurrence that works with your schedule. In this example we’ve chosen the first Monday of every 1 month so that the reminder always appears on a weekday.

Click **OK** to set the recurring reminder.
Set Recurring Reminder

Checkmark **Reminder** in the Task window and then click the **Save & Close** button to save the task.
Delete files in the Retention Folders

In this example, we’ve received a reminder to “Check Retention Folders” on December 1, 2016.

We’ll start by checking the **Email Records – 01 Year Retention** folder for any records stored in the November (or earlier) subfolder of the 2015 folder.
Delete files in the Retention Folders

Project records placed in Managed Folders ➔ Email Records – 01 Year Retention ➔ 2015 ➔ November are now a year old, and can be deleted, so we can delete the entire November folder with all of its contents.

Right-click November and choose Delete Folder.
Delete files in the Retention Folders

Click the **Yes** button in the warning window to confirm the deletion.
Repeat the steps to delete records in the other retention folders, taking care to delete the appropriate folders. For instance, if the task reminder arrives on December 1, 2016, you will only delete the 2013 November (and earlier) folders in the Email Records – 03 Year Retention folder because they are now three years old.

This concludes the tutorial for properly managing your retention folders. We hope you found the lessons helpful.