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March 2007

# ELECTRONIC RECORDS

## Responsible Recordkeeping: ***Email Records***



## Highlights

SIA\_EREC\_03\_07 supersedes previous guidance *Responsible Recordkeeping Email Records* (SIA\_05\_05) and *Treating Email as Records* (1997).

### At a Glance

This document reviews the essential role email has in the daily operation of the Smithsonian Institution and provides guidance on how email records can be managed for long-term retention in their original form.

**General guidance** is given on handling email messages appropriately as business and historical records. The topics cover the role of records at the Smithsonian, when email messages may qualify as records of value, and how to maintain those email messages that must be kept for long periods.

**Suggestions** are included for the setup and regular handling of email records so that their integrity and authenticity is maintained.

## ELECTRONIC RECORDS

# Responsible Recordkeeping: *Email Records*

### Overview

This document provides guidance on email records management and gives specific suggestions for the Smithsonian's current email application, Microsoft Outlook.

Email pervades today's business culture. Just as other large organizations have come to depend on this technology, email is an essential means of communication among Smithsonian Institution (SI) staff and Smithsonian contractors, affiliates, contributors, and patrons, as well as other governmental agencies.

In a relatively short period of time, email use has shifted from simple conversational exchanges to include regular business correspondence. The volume of email transmitted annually continues to grow exponentially,<sup>1</sup> increasing the need to manage the business and historical records with care.

Email has become integral to the manner in which the Smithsonian operates and interacts with its visitors and other parties. Virtual visitors to Smithsonian museums and galleries have multiple opportunities to receive an individualized interaction with Internet-available material. These interactions are often facilitated by email and similar technologies.

The evidentiary role of email records in legal proceedings has been well documented over the past few years. High profile multi-national companies have suffered severe judgments in which email records have played important, even pivotal, roles.

It is incumbent on Smithsonian staff to handle email records with the same care and consideration as other communication and correspondence. The following guidance is provided by the Smithsonian Institution Archives to the Smithsonian community to assist all staff in managing their email records in the proper manner.

<sup>1</sup> Knowledge Management, *Electronic content – a federal case*. January 2007. "... a single knowledge worker can easily generate 25,000 emails per year."

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# What are Email Records?

## Records and the Smithsonian Institution

Records are essential to the ongoing functioning of any human enterprise including businesses, governments, museums, and research institutions. As individuals, we keep records related to finances, taxes, births, deaths, health, and wills.

The federal government keeps records in order to carry out day-to-day business and to retain institutional memory for accountability to shareholders and the public. Records also serve to document the history of our organizations and undertakings.

The Smithsonian Institution is no exception to these generalizations. SI's basic policy is "to create and keep complete and accurate records of its activities; maintain the integrity of those records; and preserve records of enduring evidential and historical value" [Smithsonian Directive 501, Archives and Records of the Smithsonian Institution].

The Smithsonian Institution's mission – the increase and diffusion of knowledge – depends on good recordkeeping practices to achieve these goals. Within the correspondence of the Institution, we have collected an historically valuable body of records documenting, among other things:

- SI's contribution to science through achievements recorded in empirical observations.
- SI's contribution to history as found in past records.

## What is a Record?

A record is any official recorded information, regardless of medium or characteristics, created, received, and maintained by a Smithsonian museum, office, or employee. Some records are required to be saved for short periods of time such as weeks or months, some for years, and some in perpetuity.

The incorporation of desktop computers and technologies such as email means that a rapidly increasing portion of these records are now created and transmitted digitally. Whether a record is in paper, digital, or another form, its status as a record does not change.

### ***Email Records***

Email has increased exponentially over the past several years as a common communication form in business and government. As organizational correspondence, subsets of SI emails qualify as permanent records and must be treated as such. In the following sections, specific recordkeeping guidance for email records is described. A supplement to this document, ***Email Records Guidance***, is available from the SI Archives website ([http://siarchives.si.edu/pdf/CERP\\_Email\\_guidance\\_supp\\_0307.pdf](http://siarchives.si.edu/pdf/CERP_Email_guidance_supp_0307.pdf)).

Important email that is lost or missing through equipment malfunctions, backup failures, obsolete applications, and simple deletion can be costly not only in terms of dollars but the public trust and institutional memory as well. White House administrations, federal agencies, and large financial institutions have faced various consequences due to email mismanagement. See ***Email Records***

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**Guidance** for additional information.

***Records Disposition Schedules & Office File Plans***

The Smithsonian Institution Archives (SIA) provides the Institution with records management guidance and serves as the repository for permanent and some temporary records. In this role, SIA's Records Management Team often works with staff from SI units to develop records disposition schedules. The schedules identify key record types, the office of record<sup>2</sup> for each type, the format in which the records should be maintained, the length of time for which those records should be kept in offices, and when certain records should be transferred to SIA or deleted. After unit directors approve records disposition schedules, offices are encouraged to create or update file plans that align with the schedules. For more information about records disposition schedules and/or office file plans, contact the SIA Records Management Team at [SIARM@si.edu](mailto:SIARM@si.edu).

## **An authentic email record**

What makes an email record complete and authentic? Two elements are essential: the email together with its attachments and transmission data. Guidance for maintaining authentic email records can be obtained from the SIA Information Technology Archivist or found on the SIA website at [http://siarchives.si.edu/records/electronic\\_records/main\\_erecords.html](http://siarchives.si.edu/records/electronic_records/main_erecords.html).

***A Complete Package***

As a form of correspondence, a complete email record includes the full set of attachments just as a normal business letter often includes attachments. Files attached to an email should be kept in their original formats, keeping attachments together with the email.

***Transmission data***

Most of today's email systems hide the transmission information from view, or set the option to hide this information by default. This information, though, is an essential component of the complete email record. See Appendix 2 for sample transmission data.

***Examples of Official Records: Sent Mail, Received Mail, Email Replies, Forwarded Mail***

The following descriptions are examples of official email records. They are neither comprehensive nor exhaustive.

Multiple copies are a standard element of using email. A given email record might have a single recipient or a large group. When the traffic is within the organization, the sender's copy is normally the official record copy. When the email is received from outside the organization, for example one from a contractor, the primary recipient's copy is normally the official record.

**NOTE**

For a list of email types that can be deleted when no longer needed for administrative or reference purposes, see Appendix 1.

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<sup>2</sup> **Office of record** is a term which describes the office responsible for maintaining the authoritative record although staff in other units may use copies of that specific record in the course of business.

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# Managing Email Records Properly

When there are a series of replies, the official copy is usually the last reply if the whole series of emails is embedded. Forwarded emails where substantive comments have been added could also be considered official records.

Once the basic organization and tools are in place, most people will be able to use their email without a major effect on their productivity. SI Archives' IT Archivist is available to consult with staff if you need to further streamline these email management tasks.

## What do I keep?

Aside from email that you are actively using to accomplish your work, only some of your email is necessary to keep. Although all email related to work is considered a record, two criteria will help you to determine which email records need to be kept for SI recordkeeping purposes.

***The first criteria: Is the email personal rather than work-related?*** If so, then it should be discarded.

***The second criteria: Does the email have short-term value only?*** If so, then it can be discarded when no longer needed for administrative or reference purposes. Examples include email from distribution lists, general announcements, and meeting invitations. A more complete list is provided in ***Appendix 1: Weeding Emails***

***The third criteria: Is your office or unit the office of record?*** "Office of record" describes the group holding the authoritative copy. To illustrate the office of record concept, consider an SI Vacancy Announcement. Vacancy announcements are emailed to all staff and are also often distributed on the Internet as well as in paper format; however, only one copy is ultimately needed for legal, business, and historical purposes. The office of Human Resources is considered the office of record for the vacancy announcements. It is therefore responsible for maintaining the one official copy. The copy received by other Institution staff is only for informational purposes and can be discarded when no longer needed.

***Active*** records refer to email which you consult often or email that is related to a current project. ***Inactive*** records refer to emails related to closed projects or that you expect to reference only occasionally. Inactive records of short-term value should be stored under the "Hold For Trash" folder. See below for more information.

There is an additional reason to properly manage your email records. Over the course of the past two years, SI has been migrating its users from several different email applications<sup>3</sup> to Microsoft Outlook/Exchange. As part of this migration, standing policies regarding email account size limits are being enforced<sup>4</sup>. Email accounts that exceed the permitted size

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<sup>3</sup> At the time of publication, OCIO is migrating email accounts from two other software systems to Microsoft Outlook.

<sup>4</sup> Requests for account size restriction waivers are found on the PRISM website under [IT @ SI](mailto:IT@SI). The procedure to check the current size of your account are located at [http://prism.si.edu/ocio/cssd/customer/FAQs/s\\_OutlookStorage.htm](http://prism.si.edu/ocio/cssd/customer/FAQs/s_OutlookStorage.htm).

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lose the ability to send and receive further email until they have been brought back into compliance. Appropriately deleting inactive records of short-term value will help staff manage the size of their email accounts.

## Make finding email easy

One of the common challenges to appropriate recordkeeping of email is that it can be difficult to quickly find active email when it is needed. There are strategies that can minimize or eliminate this impact altogether. When this type of organization is used, it also facilitates the transfer of email to SI Archives at a later date. The additional benefit of using these application features is an improved ability to keep your important email records accessible and properly managed.

### ***Organization***

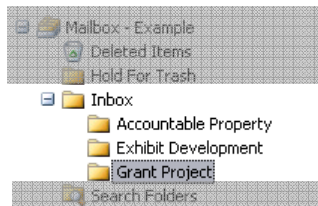
Many people feel that email organized in folders hurts their ability to quickly find old emails. However, usability and effective recordkeeping do not have to be at odds. Reasons for practicing good recordkeeping have been covered earlier in this document. What follows is an approach which maintains or improves the usefulness of your email today and helps to ensure its long-term value as well.

Start by creating subject-based (topical) subfolders under the Inbox folder (Outlook) to organize emails by subject. Placing these folders under the Inbox provides clearly evident structure of the different activities and projects of which you are a part. This information will provide valuable context for the email messages transferred to SI Archives at a later date.

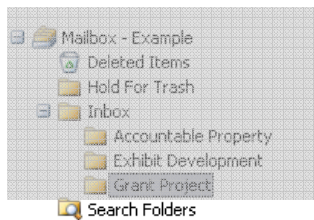
If your office has a records disposition schedule, consider using folders that correspond to the record series found in the schedule.<sup>5</sup> If your office does not yet have a records disposition schedule, create subfolders according to the major categories of your work. Whether you use your office's records disposition schedule or your own categories, use the approach that least impacts your work productivity.

### ***Streamlined Searching***

Once the subfolders have been created, a custom search folder (titled "Inbox With Subfolders" in the example on the next page) will ensure the Inbox folder, its current subfolders, and future subfolders will be included in searches. Instructions for creating this search folder appear in Appendix 3.



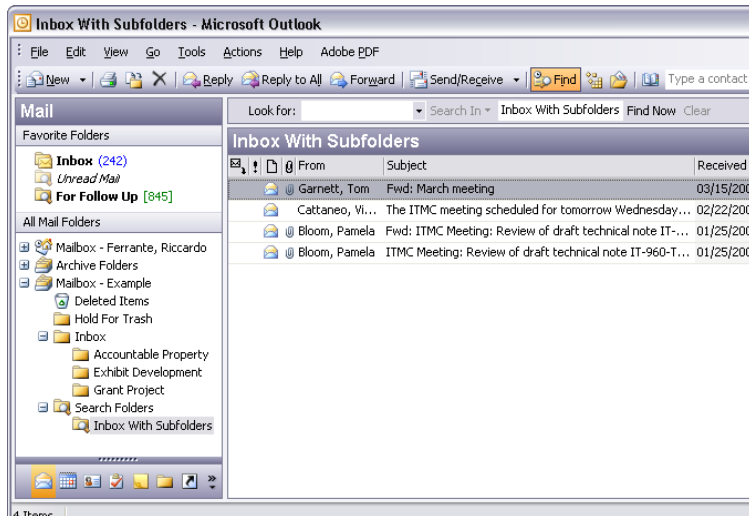
Sample Subfolders



Identifying Emails to Move to Subfolders

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<sup>5</sup> Check with your administrative officer. If you cannot locate your office's records disposition schedule, you should check with the SI Archives Records Management Team that can quickly confirm if your office has a schedule and provide you with the information you need.



This tool will now serve to identify desired emails that should be moved into the newly created subfolders. Simply click on the search folder, enter your search terms in the Find bar, verify that the “Search In” value matches your search folder’s name, and click “Find Now.” After reviewing the search results, select the items you want to move and drop them onto the desired subfolder.

For everyday use, use the same searching procedure to query all the emails in the Inbox and its subfolders.

### ***Handling “Trash” Emails***

A good number of email users treat their “Trash” or “Deleted Items” folder as a “just in case I need it” folder rather than email that they intend to delete right away. Instead of using the Trash or Deleted Items folder to keep emails you think you might need later, create a separate folder such as “Hold For Trash” for the emails that you are unsure about.

This provides two benefits:

1. The chance of accidentally deleting an item is greatly reduced.
2. The “just in case” emails can be easily archived thus keeping the size of your main email account as low as possible.

When you want to search items that you are keeping “just in case” you can search on that specific folder. Having to select that folder for a search is no different than how you search your current Trash folder.

If you want to avoid this step, you can set up this structure as a set of folders underneath your Inbox or set up a search folder to include the Trash/Deleted Items folder with your Inbox. In the first scenario, the emails in your Trash would always be searched and included in the search results when you searched your Inbox. In the second scenario, the email in the Deleted Items or Trash folder would only be included when you selected that specific search folder.

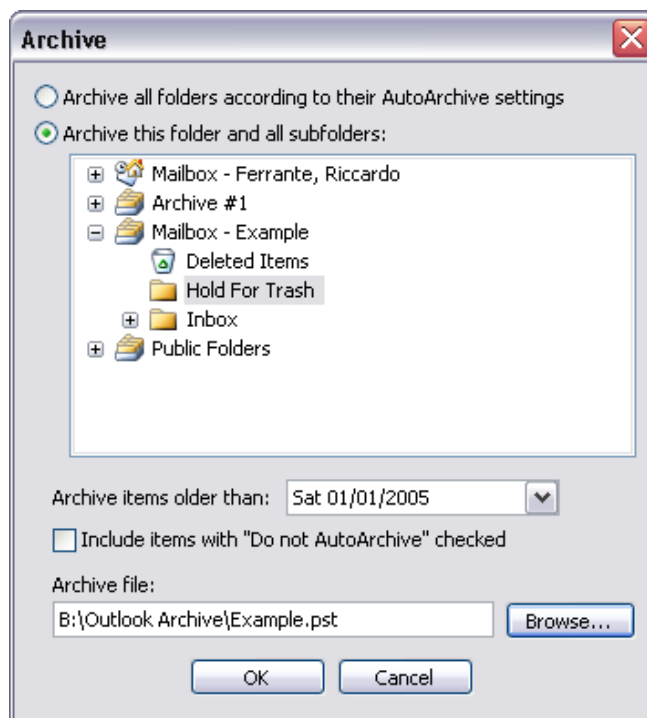


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## Email archiving functions in MS Outlook

MS Outlook has a feature called “Auto-Archive” When using these features, two chief concerns must be kept in mind. First, the term “archive” as used by Microsoft means something very different than how archivists define “archive.” Second and most important, the results of this “archive” feature fails to meet minimum recordkeeping requirements for long-term archives in terms of data file format and organization.

However, using Outlook’s *archive* feature is ideal for moving select emails out of your active mailbox without losing access to them. This helps to keep the size of your active mail account down.



In the example above, the “Hold For Trash” folder and any subfolders to be archived have been designated. This will have the effect of moving your “just in case” emails out of your main email account yet retaining access to them. Note that the option to use the Auto-Archive settings is not selected.

The Outlook archive PST (archive data file) should be located on a machine that is regularly backed up to avoid accidental loss or corruption. In the example, the B:\ drive is part of an SI network-based file server. It is strongly recommended that you locate your archive data file on your network-based personal directory. OCIO backs up the network-based file servers nightly. These backups are kept in accordance with the SI Disaster Recovery Plan, affording a period of several months when one or more deleted emails could be recovered. This makes your personal network drive an ideal place for your email archive files.

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## Use of network-based storage v. desktop or local storage

MS Outlook uses a structure called the Outlook data file as the 'home' for a person's email. While all of the records under the Mailbox folder are part of the default Outlook data file (PST file), other data files can be created. These would appear as folders at the same level as the Mailbox. It is recommended that these be kept on the network drive allocated to your personal documents since this directory is backed up regularly by OCIO.

The reason for this approach is that desktop workstation backups are not done regularly. Backing up the SI-issued desktop computer, or C:\ drive, is the responsibility of the SI staffperson. If it is not being backed up on a regular basis, the files stored there, including the email archive, are at risk of loss or corruption.

In addition, most Smithsonian desktop workstations are replaced every three years as part of the Institution's PC replacement program. Without regular backups of the content on these PCs, there is a likelihood of data being lost when the old PC is surplused or discarded.

Use of local storage devices such as external hard drives, DVDs, or data tapes can be problematic when they support re-writable functionality. Media that can be recorded and erased repeatedly introduces the possibility of accidentally overwriting or deleting important records. Also, external hard drives can be attractive to thieves and therefore need to be secured at all times.

## Transferring email records to SI Archives

On a periodic basis, inactive records created by your unit that need to be kept for short-term periods or in perpetuity should be transferred to SIA for safe-keeping and ongoing management. If your unit has a records disposition schedule, it contains guidance regarding when to destroy records and when to transfer them to SIA.

The same guidance applies to your email. In general, inactive email records that must be kept for more than three years should be transferred to SIA. Your unit or office's record schedule identifies these record categories, how long they should be kept, and when they should be transferred to the SI Archives.

When it comes time to transfer email records to the SI Archives, contact the Records Management Team ([SIARM@si.edu](mailto:SIARM@si.edu)) or the SIA IT Archivist ([FerranteR@si.edu](mailto:FerranteR@si.edu)) for assistance choosing an appropriate transfer method.

## Additional Guidance

### Records Disposition Schedule Assistance

If your office or unit needs to have your records disposition schedule updated, or a new one created, please contact the SIA Records Management Team at [SIARM@si.edu](mailto:SIARM@si.edu) or 202-633-5920. To see if a schedule exists for your office, go to <http://prism.si.edu/ocio/sia/2rmschedules.html>.

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### **Training for your office**

If you would like additional onsite training in managing email in your office, please contact the SIA Information Technology Archivist ([FerranteR@si.edu](mailto:FerranteR@si.edu)).

For other questions, or for guidance as questions arise, please contact the SIA Records Management Team at [SIARM@si.edu](mailto:SIARM@si.edu) or call 202-633-5920. The individual team member assigned to work with your office may be found at <http://siarchives.si.edu/records/bureaus.htm>.

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# Appendix 1: Weeding Email

Although all email related to work is considered a record, some email has very short-term value. In addition, email sent to groups is typically duplicated in multiple email accounts, but only one copy needs to be maintained. This appendix lists general categories of email that ***can and should be*** deleted when no longer needed for administrative or reference purposes. Except where noted, this guidance applies to both sent and received messages.

- General announcements, reminders, and information
- Email needed for reference purposes ***only***
- Email received via a distribution list or listserv (recipient only)
- Email received from another SI staffperson to which no reply is required (recipient only)
- Email on which the recipient was copied (copied recipient only)
- Calendar items
- Routine inquiries or correspondence
- Logistical emails, such as meeting requests, invitations, acknowledgements, or confirmations
- Transmittal messages for attachments that have been saved elsewhere or are drafts of a final document
- Transmittal messages, e.g. “Read the report at <http://www.sample.com/report1.htm>”, for links to websites
- Email captured in threads of later messages

Additionally, personal email, jokes, advertisements, spam, and other email unrelated to work should be deleted as soon as possible.

Email types listed above may also have temporary value. Consult the records disposition schedule for your office (<http://prism.si.edu/ocio/sia/2rmschedules.html>) or contact the Smithsonian Institution Archives Records Management Team (202-633-5920 or [SIARM@si.edu](mailto:SIARM@si.edu)) for further guidance.

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## Appendix 2: Sample Email Header

Received: from mailserver1edu ([999.999.9.9]) by mailserver1EDU with Microsoft SMTPSVC(6.0.3790.211); Mon, 26 Sep 2005 13:22:25 -0400

Received: from localhost (localhost [999.999.9.9]) by mailserver1 (Company-Mailer) with ESMTP id 79F2E1DAF for <Staff\_recipient@sample.edu>; Mon, 26 Sep 2005 13:22:25 -0400 (EDT)

Received: from mailserver1edu ([999.999.9.9]) by localhost (mailserver1 [999.999.9.9]) (amavisd-new, port 88888) with ESMTP id 20596-10 for <Staff\_recipient@sample.edu>; Mon, 26 Sep 2005 13:22:24 -0400 (EDT)

Received: from mailserver2.edu (mailserver2.edu [999.999.9.9]) by mailserver1edu (Company-Mailer) with ESMTP id D4A1A1D3C for <Staff\_recipient@sample.edu>; Mon, 26 Sep 2005 13:22:23 -0400 (EDT)

Received: from localhost (localhost [999.999.9.9]) by mailserver2.edu (Company-Mailer) with ESMTP id 010F21BA4 for <Staff\_recipient@sample.edu>; Mon, 26 Sep 2005 13:22:22 -0400 (EDT)

Received: from mailserver2.edu ([999.999.9.9]) by localhost (mailserver2.edu [999.999.9.9]) (amavisd-new, port 88888) with ESMTP id 13736-02 for <Staff\_recipient@sample.edu>; Mon, 26 Sep 2005 13:22:22 -0400 (EDT)

Received: from mail130.magnetmail.net (mail130.magnetmail.net [999.999.9.9]) by mailserver2.edu (Company-Mailer) with ESMTP id 5AAEB1BB1 for <Staff\_recipient@sample.edu>; Mon, 26 Sep 2005 13:22:21 -0400 (EDT)

Received: from mail130.magnetmail.net (mail130.magnetmail.net [999.999.9.9]) by mailserver2.edu (Company-Mailer) with ESMTP id 5AAEB1BB1 for <Staff\_recipient@sample.edu>; Mon, 26 Sep 2005 13:22:21 -0400 (EDT)

From: AIIM Webinars <aiimwebinar@aiim.org>  
Subject: AIIM Wednesday Webinar (October 5): Web Content Management - Managing More With Less

X-Bps1: 283044266  
To: sample.staff@si.edu

Date: Mon, 26 Sep 2005 13:17:03 -0400  
MIME-Version: 1.0

Content-Type: multipart/alternative; boundary="\_NextPart\_000\_1127740623\_CFX\_iMSMail\_3503011281"  
Content-Transfer-Encoding: 7bit

Message-Id: <20050926172221.5AAEB1BB1@ mailserver2.edu>  
X-Virus-Scanned: EMS border system

Return-Path: mmreturn@magnetdev.com  
X-OriginalArrivalTime: 26 Sep 2005 17:22:25.0710 (UTC) FILETIME=[DCFD74E0:01C5C2BE]

X-OriginalArrivalTime: 26 Sep 2005 17:22:25.0710 (UTC) FILETIME=[DCFD74E0:01C5C2BE]

--\_NextPart\_000\_1127740623\_CFX\_iMSMail\_3503011281

Content-Type: text/plain; charset="ISO-8859-1"  
Content-Transfer-Encoding: quoted-printable

--\_NextPart\_000\_1127740623\_CFX\_iMSMail\_3503011281

Content-Type: text/html; charset="ISO-8859-1"  
Content-Transfer-Encoding: quoted-printable

--\_NextPart\_000\_1127740623\_CFX\_iMSMail\_3503011281--

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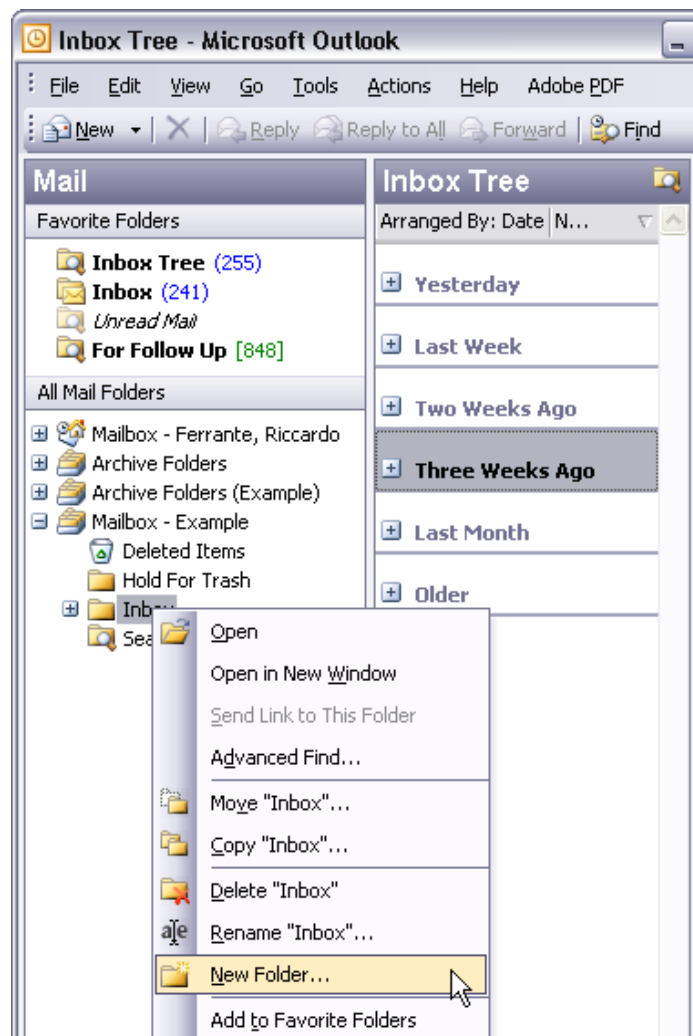
## Appendix 3

# Setup, Relocation, and Ongoing Searching Configuration Procedures for *MS Outlook* Users

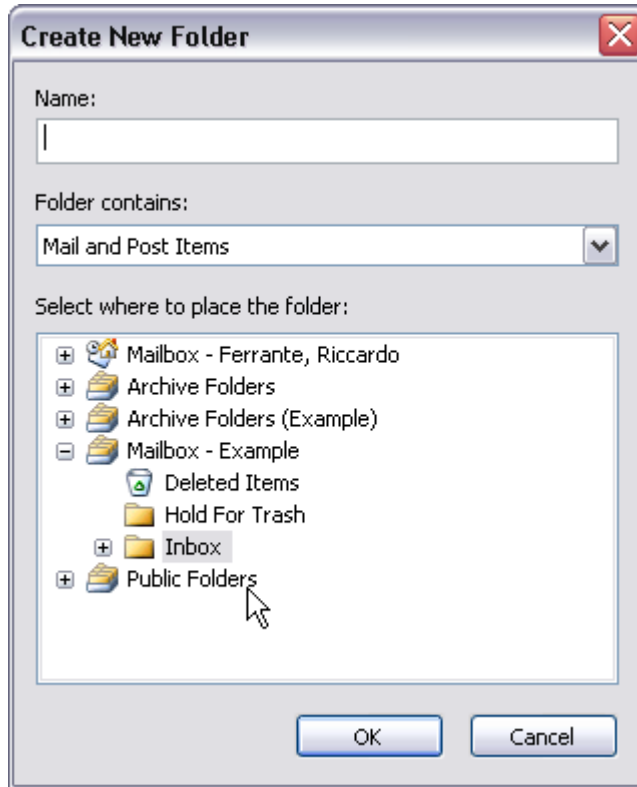
### Creating Subfolders and a Hold For Trash folder

The procedure for creating subfolders is the same whether one is creating them underneath the Inbox or the top level Mailbox. Creating subfolders underneath the Inbox is used as the example below.

1. Right click on the **Inbox** folder
2. Select **New Folder**



3. Enter the name you wish to give the folder and click **OK**.



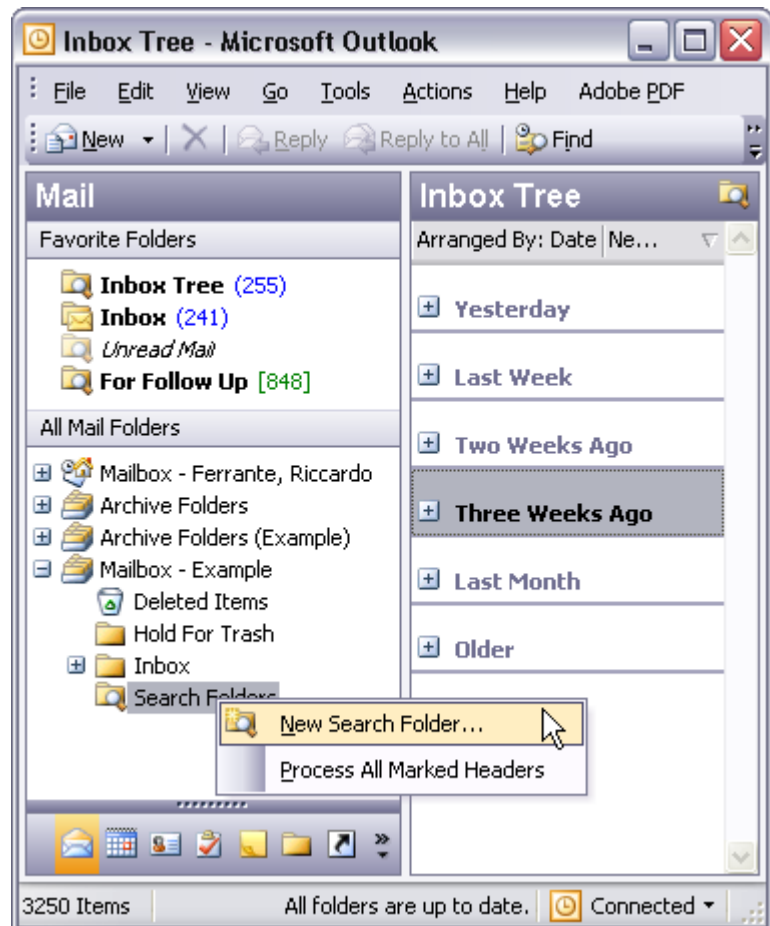
### ***Hold For Trash***

Perform the procedure described above. If you want to create this folder at the same level as the Inbox folder rather than as a subfolder under the Inbox, right click on the **Mailbox** folder instead of the Inbox folder.

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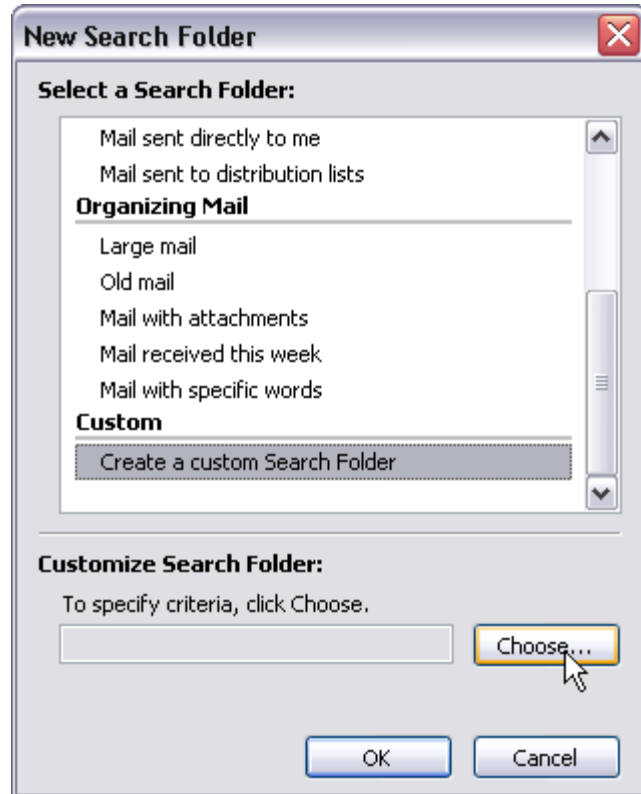
### Creating the new Search Folder

1. Right click on the **Search** folder
2. Select **New Folder**

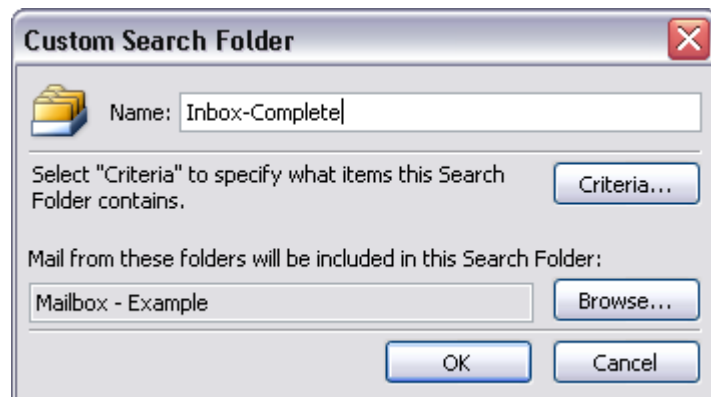


3. Define the Customized search that will let you automatically search your Inbox and all its subfolders simultaneously without having to use the Advanced Find Option.

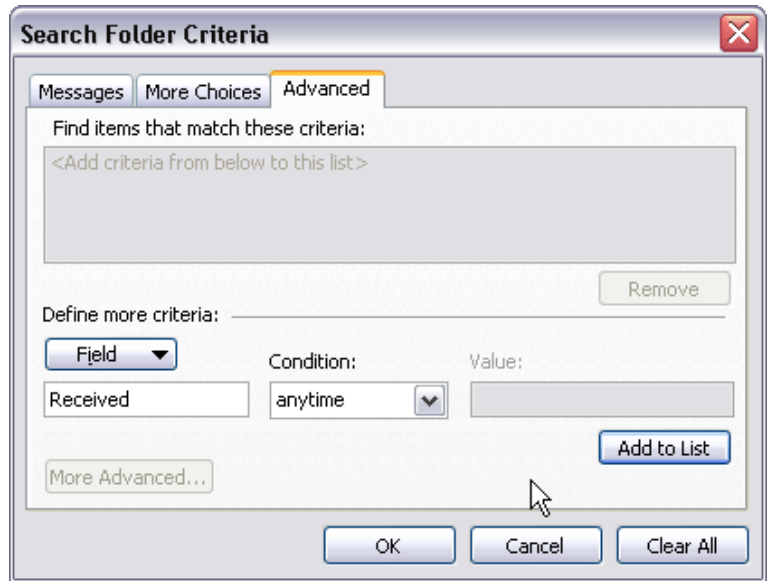




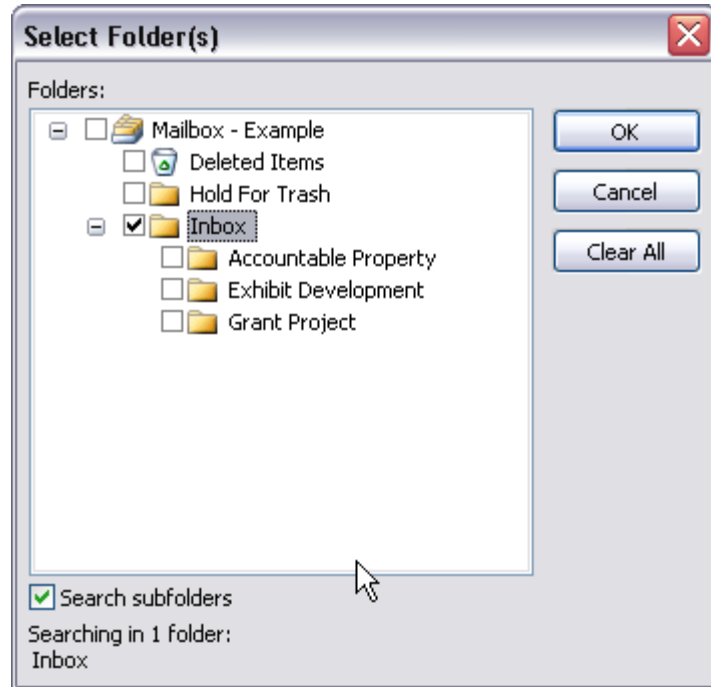
4. Scroll down to the bottom of the New Search Folder and select **Create a custom Search Folder**.



5. Click on the **Criteria** button.



6. Choose the **Advanced** tab. A drop-down list will appear. Position your mouse over **All Mail Fields**. Another list will pop-up containing all of the different mail fields. Select **Received**. The window should now match the image above.
7. Click on **Add to List**, then **OK**. This will return you to the Custom Search Folder window in step #4.
8. Now choose **Browse**. You will notice **Include subfolders** in the bottom left hand corner is already checked. Select the Inbox. Deselect Mailbox if it is checked. Click **OK**. You have completed define your new search folder.

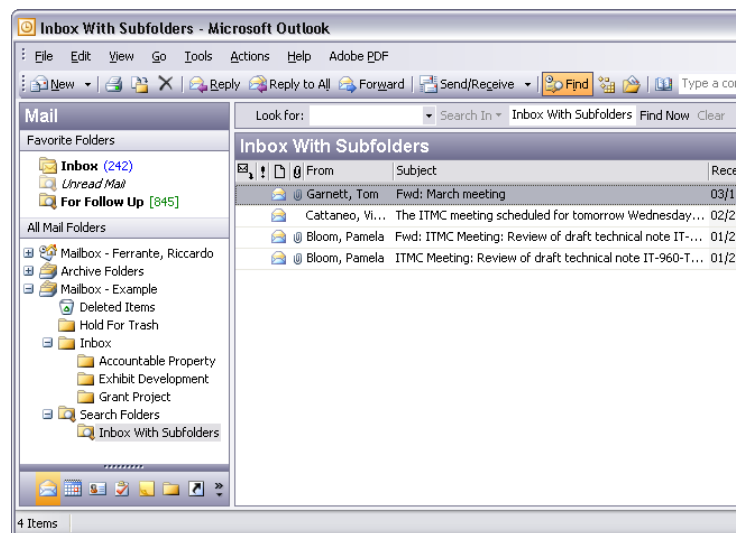


## Identifying and Moving Emails

### *Performing search with the new Search Folder*

1. Select the Search folder you just created by clicking on it.
2. Choose the **Find** command from the Menu Toolbar at the top of your Outlook window. Simply enter the keywords you want to search for. Your results will display in the main section.

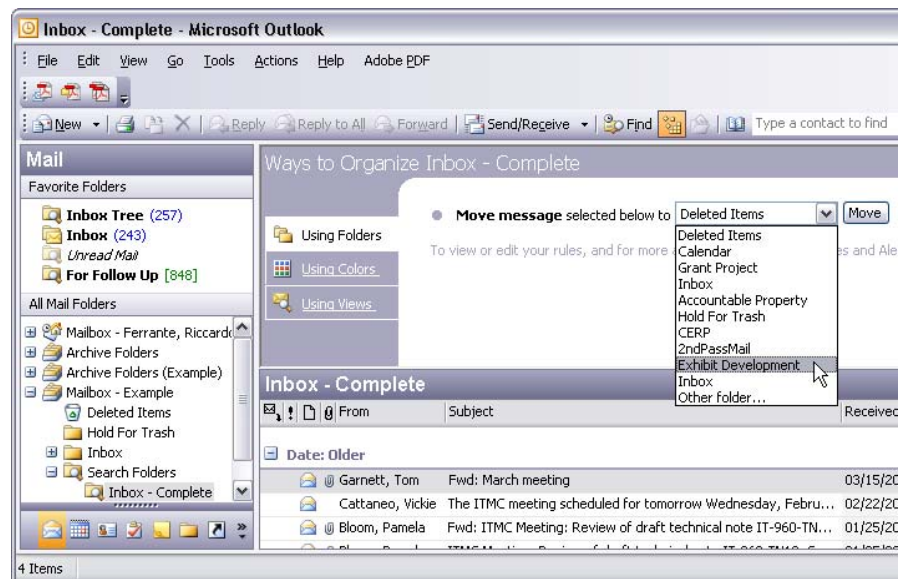
Note: The Find bar will appear above your email message display. The new Search will automatically appear as the Search In value.



3. Skim through the email message subject lines that are displayed to determine if you have found the emails you want to move to one of your Inbox subfolders.
4. If they encompass more than the group you had hoped to identify, repeat your search with more or different keywords.

### ***Moving the emails into the new folders***

1. Select all or only those you specifically choose.
2. Choose the **Organize** command located under the **Tools** menu or clicking on the icon on your Outlook toolbar.
3. The display pictured below will appear.



4. The selected mail will be moved to the subfolder chosen. If the subfolder is underneath the Inbox, it will remain on the display.

For new emails as they are received, use the display from your Inbox-Complete search and follow the ***Moving the email*** procedure immediately above.

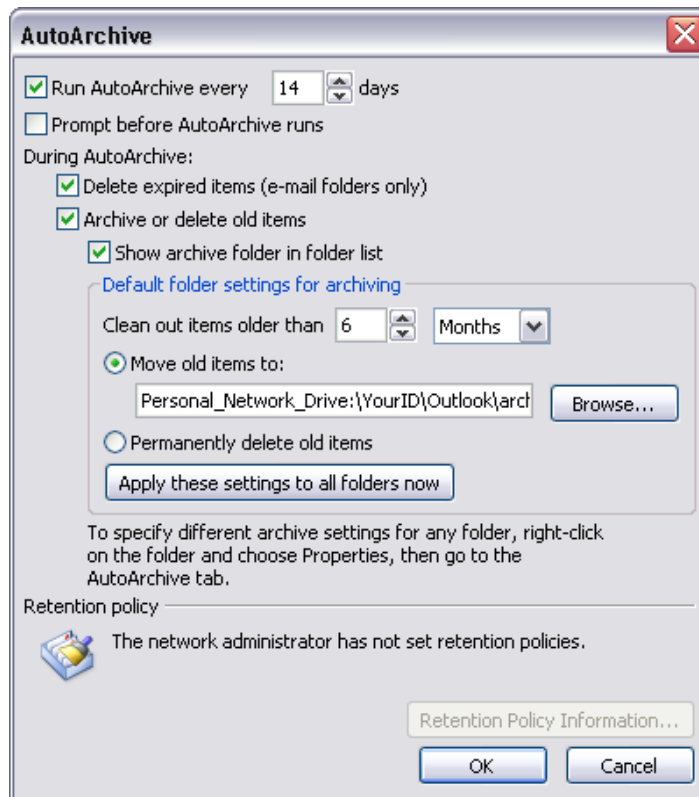
Note: Emails can also be drag-and-dropped into the desired subfolder.

### **Taking Advantage of Outlook's Auto-Archive Feature**

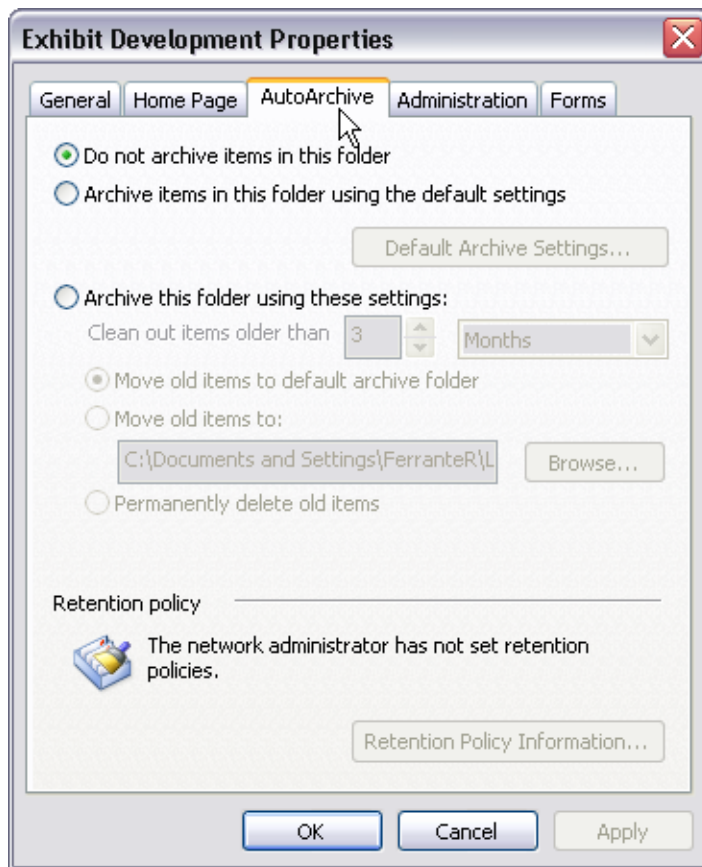
The **Auto-Archive** feature can be used to further reduce the impact of this task. Using the menu commands, go to **Tools > Options** and click on the **Other** tab.



In the example configuration shown on the next page, Auto-Archive will only archive email items older than 6 months. It will run every fourteen days. Note that “**Permanently delete old items**” is not selected. You can select “**Prompt before AutoArchive is run**” which will give you a chance to decline.



You can mark specific folders as “**Do Not Archive.**” To do this, right click on the chosen folder(s) and select **Properties**. Go to the **AutoArchive** tab. Click on the “**Do not archive items in this folder**” option. The items in this folder will not be included when AutoArchive is run.



If you choose to perform a manual **Archive** operation, you are given the chance to override your **Do Not Archive** settings.