



# POLICY STATEMENT

Policy Statement 2053

Policy Area: Information Technology

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## AUTOMATED AGENCY EMAIL ARCHIVING POLICY

### I. COVERAGE

This Policy Statement covers all account holders, that is to say, all permanent, temporary, and part-time employees and interns of the Court Services and Offender Supervision Agency (CSOSA) and the Pretrial Services Agency (PSA) (referred to collectively as the "Agency"), as well as contractors or other entities that access and use the Agency's email resources.

### II. BACKGROUND

In order to better manage the messaging system's large volume of email messages, tasks, and calendar events; reduce the amount of server storage space used by email; and enhance Agency account holders' email search and indexing capabilities, CSOSA's Office of Information Technology has implemented an enterprise automated email archiving system.

This email archiving system reduces storage space and costs, while simplifying management of the messaging system. Archiving tasks are now managed automatically and allow for seamless retrieval of archived information. The system also provides built-in search and discovery capabilities for account holders.

### III. POLICY

This policy authorizes the implementation of an automated email archiving system, which automatically archives all Agency email, tasks, and calendar events older than 30 days. The general procedures are outlined in Appendix A.

### IV. AUTHORITIES, SUPERSEDURES, REFERENCES, AND ATTACHMENTS

A. Authorities:

OMB Circular A-130

B. Supersedures:

None.

- C. Procedural References:
  - Records Management Policy Statement (upon its issuance)
  
- D. Attachments:
  - Appendix A. General Procedures

## **Appendix A. General Procedures**

### **Email Archiving Procedures**

#### **A. Roles and Responsibilities**

##### **1. System Administrator**

- a. Migrate account holder mailboxes to the Enterprise Vault.
- b. Import existing Personal Folders (.pst files) to the Enterprise Vault.
- c. Manage the Enterprise Vault.

##### **2. Account Holders**

- a. Account holders have the discretion to delete items within their mailbox within the grace period of 30 days from receipt of the message or creation of the calendar event or task before the email items are moved to the Enterprise Vault. Items are moved to the Enterprise Vault daily when their age crosses the 30 day threshold. Account holders are encouraged to delete any personal email messages received or sent within this 30-day grace period.
- b. Once an item is moved to the Enterprise Vault, the item will be retained in the Enterprise Vault for ten years. Account holders are responsible for maintaining a copy of the item in the appropriate record file in accordance with the Agency's Records Management Policy Statement if the item is required to be retained for more than ten years.

#### **B. Procedures**

##### **1. The archiving procedures are detailed as follows:**

- a. All Agency emails, tasks, and calendar events older than 30 days are archived automatically to the Agency Enterprise Vault server managed by the CSOSA Office of Information Technology.
- b. The archived items are accessible to the account holder in his/her mailbox as normal, however, the actual storage location of the electronic record is on the Enterprise Vault server rather than the email server.
- c. While archived email items are accessible to the account holder as normal in their email mailbox, they cannot be modified or deleted. However, they can be moved to different folders within the mailbox.
- d. All archived items including tasks and calendar events are retained for 10 years. This retention period exists regardless of whether the recipient or sender remains employed with the Agency.
- e. Email messages residing in the messaging system's Deleted Items folders are not archived and remain untouched by this policy. In addition, email

messages, tasks and calendar events deleted before the 30-day archive window are not archived.

- f. Under the implementation of this policy, all email information stored in existing PST files (Microsoft Outlook Personal Folder File Format) either on local computers or home directories is moved to the Enterprise Vault. This process is transparent to the account holder and existing personal folders appear exactly the same, they are just moved from the existing PST files to the Enterprise Vault and will appear in a slightly different location on the Microsoft Outlook display.