

Saving Email
records to
your S: or H:
Drive



St. Lawrence
College

This training manual contains
instructions on how to save email
records to an S: or H: Drive

May 14, 2017

Background Information

- A new email retention policy will be implemented on July 1st, 2018
- On July 1st, 2018, ALL email records (in your Inbox, Sent box and other email folders) that are older than July 1, 2016 will be DELETED
- All email records received after July 1, 2018 will be retained for 24 months ONLY

Why?

- In order to comply with the Information and Privacy Commissioner of Ontario's Bill 8 (which became law January 2016), SLC is required to have a defined and legally defensible email and document management policy in order to meet legal and regulatory requirements. (<https://www.ipc.on.ca/wp-content/uploads/Resources/Bill8-New-Recordkeeping-Amendments.pdf>)
- The risk and work to meet FIPPA requests increases without a retention policy
- Our current practice of using personal email to store college records puts the college at risk when individuals leave

What do I have to do BEFORE July 1st, 2018?

- Email related to **legal, tax, fiscal, or audit** matters are considered corporate records and must be saved to your departmental S: Drive
- Email that is important to your school or department for the purposes of business continuity, reference or retention **OUTSIDE** of the 24 month retention cycle should also be saved to your departmental S:
- Email that you may wish to save for personal reference **OUTSIDE** of the 24 month retention cycle can be saved to your H: Drive or OneDrive for Business
- **DO NOT** archive the entire contents of your email; this will not assist us with complying with Bill 8, and will cause a great deal of unnecessary strain on the College's server infrastructure
- Manager/Dean/Associate Dean/Faculty email that is involved (or potentially involved) in a student appeal, complaint or incident where all of the information is not captured in related forms or reports should be stored to the departmental S: Drive
- Copies of vendor contracts and agreements in your email are to be sent to the Kathy Gray in the **Office of the Sr. VP Corporate Services & CFO**
- Ensure you follow the same review process for group or shared email boxes

Additional guidance:

- Remember that email messages ARE retained for 24 months and do NOT need to be saved to the S: Drive unless it is deemed a corporate record OR there is potential for the email to be required for business continuity, reference or retention purposes after 24 months
 - If you have questions, please discuss your school or department record management requirements with your Manager
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- If you require access to your departmental S: Drive or need a new folder created, please have your Manager contact the IT Service Desk with details
- Be aware that some folders on the S: Drive are shared and may not be appropriate for confidential information
- Emails that contain information which is subsequently captured in a procedural form or report does **NOT** need to be saved to the S: Drive. Examples include:
 - Contract terms and conditions already captured in a contract that is sent to Corporate Services
 - In-progress or completed record change forms
 - Labour-related emails where HR has been copied. HR staff are exempt from the email retention policy and will therefore retain a copy automatically
 - Incident Forms where all information is captured
 - Complaint Forms where all information is captured
 - Appeal Forms where all information is captured
- Emails that contain information which is NOT entirely captured in a procedural form or report should be saved to your departmental S: Drive or H: Drive. Examples may include:
 - Student code of conduct issues
 - Academic integrity issues
 - Disciplinary issues
 - Student appeals
 - Accommodations
 - Student complaints
- Note that SLC's **Academic Policy** identifies academic records management requirements
- Additional FAQ's can be found at :
<https://stlawrencecollege.sharepoint.com/sites/slcme/staff/Pages/Email-Retention.aspx>

How to save your email messages, folders and attachments to your S: or H: Drive

Email messages

1. Open the email message
2. On the top left, under File, select "Save As" Navigate to your S: Drive and the appropriate folder to save the email record
3. Update the name of the file to ensure it is properly identified with a meaningful name
4. Click "Save"

Email folders

1. Click on the email folder
2. Click anywhere on the list of emails
3. Ctrl "A" to select all of the emails in this folder
4. On the top left, under File, select "Save As"
5. Navigate to your S: Drive and the appropriate folder to save the email record
6. This will save all of the highlighted emails in one text file.
7. Update the name of the file to ensure it is properly identified with a meaningful name
8. Click "Save"

Attachments

1. Open the email with the attachment
2. Right click on the attachment file
3. Select "Save As" and select the appropriate S: or H: Drive location.
4. Click "Save".

In all cases, please select an appropriate file name for the files so that it can be easily identified in the future.

If you have many emails to review and save, you may wish to organize in your email box first and then copy the folders to the appropriate S: or H: Drive location. Instructions are below:

1. Create sub-folders in your email inbox. You can do this by right-clicking on the "Folders" folder under your Inbox (left side) and then select "Create new folder" and name appropriately.
2. As you review email, drag pertinent emails to the appropriate folder.
3. From this folder you will be able to move these emails to your S: or H: Drive by following the instructions above for Folders.