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## Training

Welcome to the City of Bellevue's EmailXtender Training Site

### What is EmailXtender?

EmailXtender is a email management software product that preserves email by migrating messages from the Outlook server (where your inbox lives) to the Xtender server. It removes duplicate messages and compresses message file size. It's seamless; all you see of this process is the Xtender folders (Listed under **\*Email Storage\***).

### What does EmailXtender look like?

**Six** common Outlook folders (located under **\*Email Storage\***) with retention periods attached to them (from 2 to 10 years) were pushed out to your department on March 3<sup>rd</sup>. In addition to the six common folders, departmental specific folders were also pushed out. These folders also have retention periods attached to them.



**\*\*Your email doesn't** automatically appear in these folders. **You** have to take an action to save your email records. As City employees, everyone is responsible for the management of his/her own records.

### Common Folders (with retention periods)

1. Administrative (**2 years**)
2. Citizen Complaints / Public Records Requests (**3 years**)
3. Employee Issues (**6 years**)
4. Finance Support Documents (**3 years**)
5. Legal Opinions / Advice (**10 years**)
6. Planning and Project Files (**6 years**)

Each department has their own department-specific folders with their own specific retention period. A **RETENTION PERIOD** is the amount of time required to keep a series of records. The City bases their retention periods on the state of Washington's minimum requirements for records retention.

## Contact

[Email Management](#) x7899

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### **Additional City Clerk's Office Folders (with retention period)**

1. Hearing Examiner Files (**6 years**)
2. Board Management (**3 years**)

To continue the training, click [here](#).

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Public Records Analyst**IMPORTANT**

In addition to the E-mailXtender folders, IT has instituted a **90 day** destruction period. It purges any messages from your inbox, sentbox, deleted items, and draftbox, that have not been put into one of the Xtender folders after 90 days.

This destruction is done manually by an IT technician on a Sunday at the **end of the month**. However, these 90 day periods usually fall in the middle of the week. They will be purged on the following Sunday.

**EXAMPLE:** If, your 90 day period ends Monday June 30th, then your emails will be purged on following Sunday, July 6th since the last day of the month falls during the week.

**LET XTENDER DO SOME OF THE WORK**

Let the 90 day destruction period do some of the work of weeding out those records without a retention period (**thank yous, meeting notices, invitations, etc**).

As long as you place **just** the records with a retention period into Xtender common folders, your records are safe from the 90 day destruction period.

Since every City employee is responsible for managing their own records, these folders help you comply with Washington State state records laws.

**WHAT CONSTITUTES AN EMAIL RECORD??**

All messages received in email accounts in the normal course of City business are public records, BUT not all records are equal.

Some records have retention periods, while others do not and can be destroyed at any time, usually when their administrative value has passed.

Just like paper documents, it's the **CONTENT** of an email message that determines whether it is a record, **NOT** the format.

**WHAT IS A RECORD WITH A RETENTION PERIOD, IN GENERAL:**

A record with a retention period must be retained for a certain pre-established period of time (a retention period).

*It is a document in any format that is...*  
*Created in the course of City business*  
*Received for City action*  
*Documents City activities, decisions, or actions*  
*Mandated by statutes or regulations*  
*Supports City financial obligations or legal claims*  
*Communicates City requirements*

**OTHER CONSIDERATIONS: WHO IS THE PRIMARY RECORD HOLDER?**

The primary record holder maintains the "record" copy. He/she can be the person who creates a document, the final reviewer, the primary recipient of outside communication, or the project leader. It is important to look in your **inbox** and **sent box** for these records.

**WHAT ARE RECORDS WITHOUT A RETENTION PERIOD?**

Personal papers not related to City business  
Examples: *soccer schedule, Thank You, family correspondence*  
Reference materials  
Examples: *vendor catalogs, phone books, technical journals*  
Convenience copies  
Examples: *extra copies of documents and messages*  
All Employee Announcements  
Examples: *City Council Recap, Bulletins,*  
Draft documents\*  
Examples: *drafts with no substantive revisions /comments*  
Working papers\*  
Examples: *rough notes, calculations, routine exchange of information for a project*

**\*Unless needed to support the decision trail or required in the records schedule**

**WHAT ABOUT THE RECORDS YOU NEED TO KEEP PERMANENTLY BEYOND ONE OF THE XTENDER COMMON FOLDER'S RETENTION PERIOD?**

Network Drives (J, F, S drives)  
Post to Intranet/SharePoint Site  
Standard storage format for email records outside of outlook is .MSG file format (It retains the entire structure of the email including attachments).

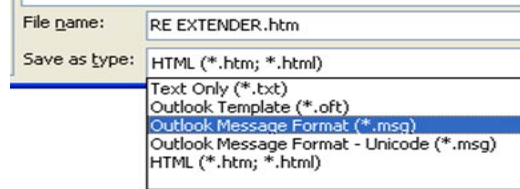
.PST files/Personal Archives files are easily corrupted and NOT suitable for email record storage. You can open .PST files and save them as .MSG files.

#### **IF YOU WANT TO SAVE AN EMAIL MESSAGE ON YOUR HARDRIVE:**

It must be in OUTLOOK MESSAGE FORMAT (\*.msg).

To do this:

- 1.) Double click on the email that you want to save.
- 2.) Then, choose "file" from the top menu bar.
- 3.) Then choose "save as" from the drop down menu.
- 4.) Name your email, then choose ".msg" format from the bottom drop down menu.
- 5.) Then designate a location for the saved email (ie. J, F, or S drives).



#### **WHAT ABOUT THE RECORDS WITHOUT A RETENTION PERIOD THAT YOU WANT TO SAVE BEYOND 90 DAYS?**

- 1.) Set up folders on network drives (J, F, S drives)....follow saving process above
- 2.) Post to Intranet Site/SharePoint Site
- 3.) Put in "Archive Folders" (.PST): Do **NOT** store records **with** a retention period here. This is perfect for reference material or personal information. Please store records with a retention period in the Xtender folders.

\*\*Please contact support (#2886) if you need help with setting up "Archive Folders" or determining if a folder in outlook is a .pst (archive) file.

#### **SUBFOLDERS**

In order to ensure that your email records are kept beyond the 90 day destruction period in Outlook, you must place them in either an Xtender folder or a subfolder located underneath an Xtender folder.

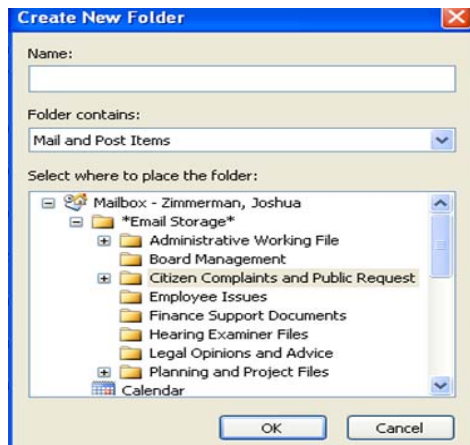
You can easily drag and drop old messages and folders into the new Xtender folders.

REMEMBER: The parent folder's retention will be attached to the new subfolder and messages.

WARNING: Folders that you create under the parent folder (\*Email Storage) **will** be subject to the 90 days. You **MUST** create folders underneath one of the common Xtender folders or department specific folders mentioned above.

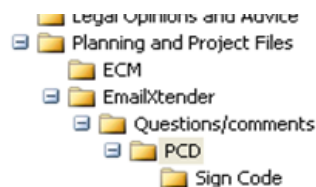
#### **SETTING UP SUBFOLDERS IN XTENDER**

- 1.) "Right Click" on the Xtender common folder under which you want to create the subfolder.
- 2.) Then click on "Create Folder." A box entitled "create new folder" will appear like this...



- 3.) Name the subfolder, using a name that you (AND OTHERS) will easily recognize. If they are contracts call them "contracts" not something like "Josh's stuff."
- 4.) The more specific the better (i.e. a certain type of contract or contracts listed by month or year).
- 5.) Click "OK" and your done.

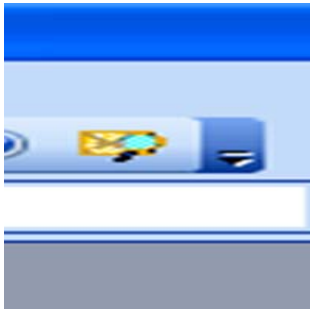
You can create as many subfolders as you want, even whole directories. You can name them what you want, but you must make sure that they are nested within one of the common Xtender folders or one of your department specific folders.



#### **SORTING AND SEARCHING EMAIL**

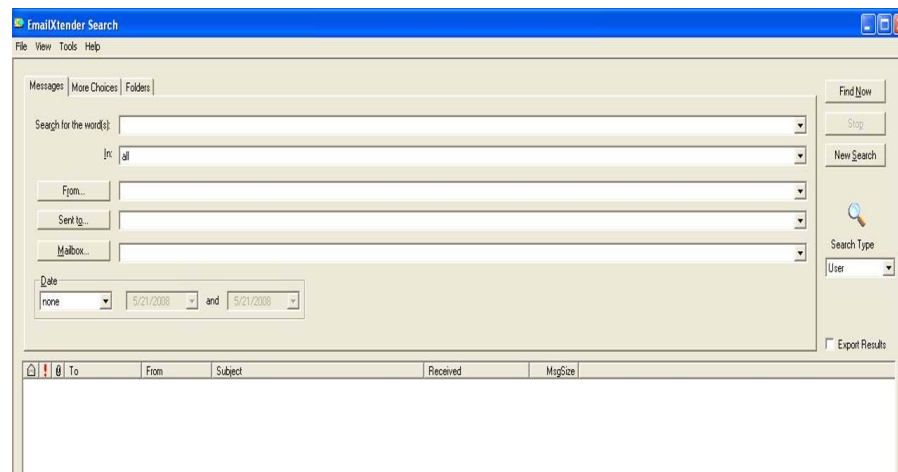
*Extender searches:*

The Xtender search button resides in the right corner of the Outlook screen, below the search box entitled "type a question here for help."



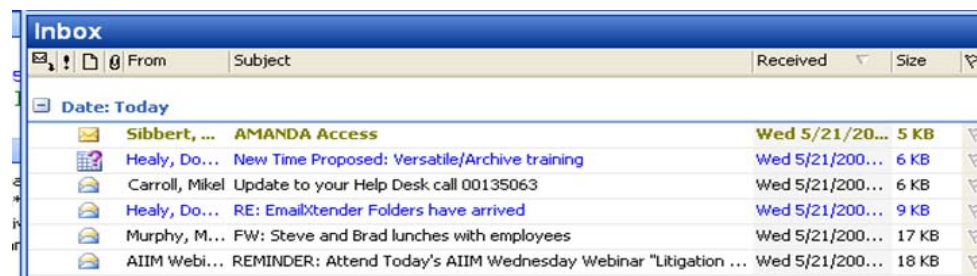
You can search for email by subject, sender, date, etc.

You can also search for messages that you were cc'd or bcc'd on, which you have deleted, **provided that** the sender saved them in the first place.



#### Sorting Email

You can color code text of senders.



You can also set up **rules and alerts** to route emails from certain senders or that contain certain subject to Xtender folders. They are effective, but the less the better. You can set up rules and alerts in the "tools" menu, by choosing "rules and alerts" on the drop down menu. Call the support (#2886), if you need assistance setting them up.

**PLEASE FEEL FREE TO CONTACT RECORDS MANAGEMENT (#7899) WITH ANY QUESTIONS**

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