

Email Management & Outlook Web App (OWA)

Presented by:

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What We're Covering

- **Key Terms - mailbox migration and archiving**
- **Quick review on How to Manage Email**
- **Introduction to the new Policy Folder names**
- **Introduction to ZyLAB, the City's new archiving system**
- **The NEW OWA**

Key Terms

- **Exchange Online** – The City’s backend email system that is made up of email servers, mailboxes, and email data storage areas that reside in the Microsoft “Cloud” environment.
- **Outlook** – The name of the software client installed on City computers used to access email stored in the backend Exchange Online environment
- **OWA** – “Outlook Web App” the web-based Outlook client used to access email from an Internet **Browser** (Internet Explorer 10 and above)

Key Terms, cont.

- **Archive** – A 3rd party email storage system that retains email for business, regulatory, and legal purposes, even after they have been deleted from Exchange. This includes emails, contacts, meetings and appointments
- **ZyLAB** – the new Archiving system (replacing Mimosa)
- **Retention** – A rule for how long an item should be kept
- **Policy/Retention Folder** – A location for retaining email which has a specific retention applied to it. May be in the Exchange or Archive system environment.
- **AutoDelete** - A policy set in Exchange that automatically deletes email from your mailbox at a set time

Misconceptions About Email

All of the Following Statements are INCORRECT:

- I only need to keep my email 45 days since that is the retention period
- IT can recreate my email anytime from their back-up tapes
- I'm not sure I need the email, so I'll just delete it and hope someone else keeps it
- Personal email sent via my City account is my own business and not a public record

Email IS a Public Record

According to State laws, email is a record because:

- it documents substantive public business – OR –
- you used public equipment to create or receive email

In other words: Any email that comes in or goes out of a @seattle.gov address is a public record including:

- Lunch appointments
- Personal photos
- Jokes
- Email from family/friends
- Coffee dates
- Recipes
- Messages to:
doctors/lawyers/contractors/babysitters/teachers, etc

What Do I Need to Retain?

Emails that document SUBSTANTIVE City business:

- **What purpose does the email serve?**
- **Does it make a financial, legal, contractual decision?**
- **How does the email affect:**
 - **A project**
 - **A policy**
 - **A procedure**
- **Would I be unable to make a decision or complete an action if I didn't have the information in the email?**

How you answer the questions above will determine if the email is substantive

How Long Do I Need To Retain It?

- **What is a retention policy?**
 - How long the record needs to be retained to ensure compliance with regulations
- **Where do I find the retention policies?**
 - City Records Management Program InWeb
 - <http://inweb/clerk/RecordsManagement/RecordsRetentionSchedule.htm>

What CAN I Delete?

- **Miscellaneous notices or memoranda**
 - Broadcast e-mail notices of holidays or special events
 - Local news roundups
 - Who is out of the office today
 - Updates
- **Informational copies**
 - External organization newsletters
 - “FYI”
- **Preliminary drafts**
 - Letters, memoranda, or reports and other informal notes which **do not** document substantive changes in the preparation of a final document

What CAN I Delete? cont.

- **Personal messages**
 - Coffee breaks, lunch appointments, etc.
- **Publications**
 - Informational newsletters, catalogues, and pamphlets received which are for general information only
- **Unsolicited advertising materials**
 - Vendor spam, menus, etc.

What About?

- **Emails where I am a cc?**
 - Project leads should retain official project documentation
- **Attachments?**
 - Does the email offer additional information?
- **Sent mail?**
 - Does your reply have the most information?

Tips For Managing E-mail

Delete emails immediately if they have no retention value – WHY?

- **AutoDelete in Inbox & Sent Items will be increased to 90 days (3 months).** Don't let email sit - will increase the number of emails in those folders and may result in lost email

Use personal email to subscribe to external organizations that do not relate to your job

- Example: newsletters, mailing lists, subscriptions

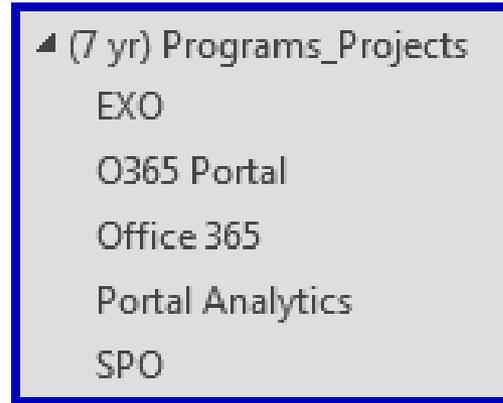
Sort your Inbox so new email is at the end

- Scrolling through pages of email will help you realize you need to organize

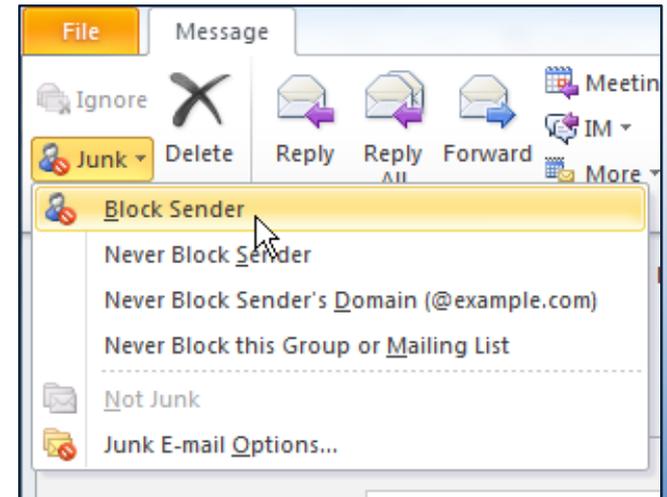
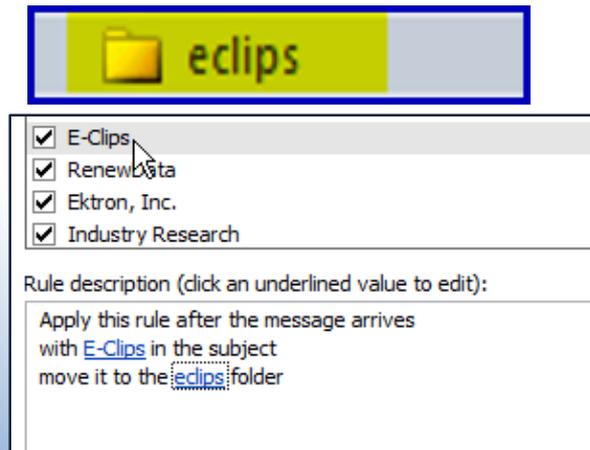
Move/copy email to Policy Folders as soon as possible

Tips for Managing Email

- Set up subfolders within policy folders →
- Use Rules to move emails from specific addresses to special folders



- Use block sender

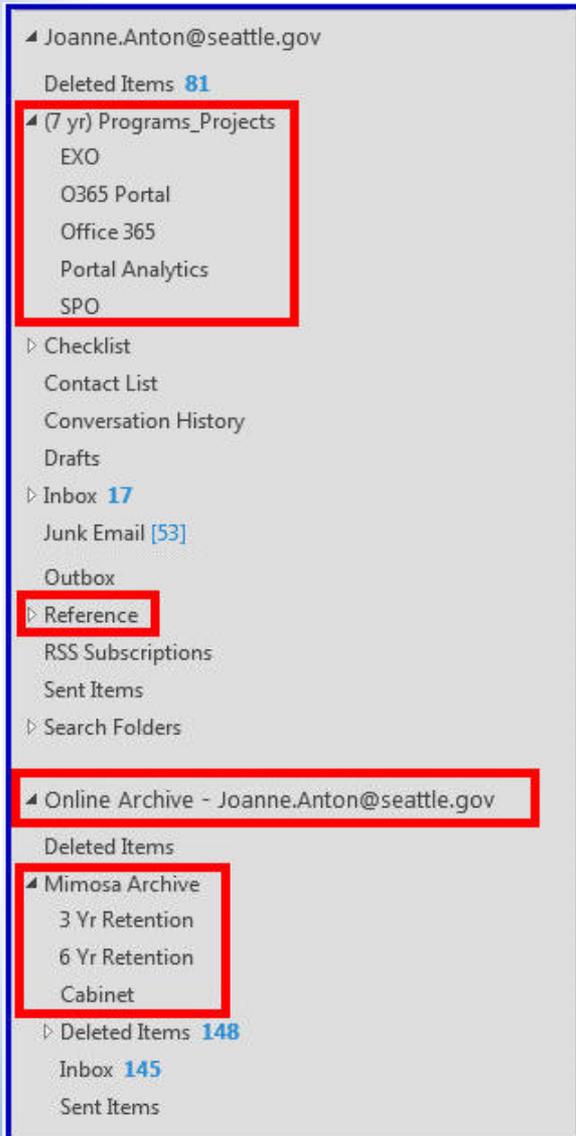


ZyLAB – A Brief Introduction

ZyLAB is an email archive system that reviews Outlook each night for specific policy/retention folders

Email in Outlook is **COPIED** to ZyLAB every night and retained based on the retention assigned to the folder

NEW! Email will be viewable in Outlook in the Policy Folders 2.5 years (instead of 45 days) and then via ZyLAB for entire retention policy



Why ZyLAB?

- **Why are we implementing ZyLAB?**
 - Mimosa being phased out
 - Mimosa is incompatible with Exchange Online
- **What does it mean for users?**
 - New policy folders based on function
 - Longer viewing period in Outlook
 - Increased autodelete policy on Inbox/Sent Items
 - Increased mailbox storage/size

More ZyLAB

- **How does ZyLAB work?**
 - Same as Mimosa, drag and drop items to policy/functional folders, ZyLAB does the rest
- **New Feature to Help Organize**
 - 7 day Buffer (or “Grace”) period
 - If you move an email to policy folder, and realize it was not the correct folder, you have 7 days to move it to the correct folder before ZyLAB locks down the retention policy

More ZyLAB

1. Email is only deleted from ZyLAB when the retention policy assigned to the policy/functional folder expires
2. Law and Public Disclosure Officers (PDOs) will have the ability to search the ZyLAB archives
 - *They can see all email in the archives for specific users, including email that is personal*
3. ZyLAB will retain email even after an employee leaves the City

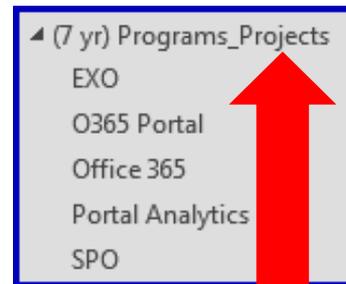
A Glance at Standard Folders

Folder Name	Deleted from Outlook	Retained in ZyLAB
Inbox	90 days	90 days unless deleted earlier
Sent Items	90 days	90 days unless deleted earlier
Calendar	2 years	2 years
Junk Mail	14 days	14 days unless deleted earlier
Policy Folders	2.5 years	Retention policy in () prior to folder name Ex: (13 yr) Levy
Reference	2.5 years	Only in ZyLAB as long as email is in Outlook

Note: Subfolders inherit the retention period of the parent folder

Major ZyLAB NO NO!

Do **NOT** rename, move or delete the policy/retention folders. If you do, ZyLAB will not ingest and retain the email for the intended retention schedule. Email will be retained for only 2.5 years.



Don't Rename Parent Folder !!!

Policy Folders in Outlook

2013

To access Mimosa via Internet:

2010

Start Menu – All Programs – City of Seattle – Mimosa

Joanne.Anton@seattle.gov

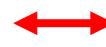
- Deleted Items 81
- (7 yr) Programs_Projects
 - EXO
 - O365 Portal
 - Office 365
 - Portal Analytics
 - SPO
- Checklist
- Contact List
- Conversation History
- Drafts
- Inbox 17
- Junk Email [53]
- Outbox
- Reference
- RSS Subscriptions
- Sent Items
- Search Folders
- Online Archive - Joanne.Anton@seattle.gov
- Deleted Items
- Mimosa Archive
 - 3 Yr Retention
 - 6 Yr Retention
 - Cabinet
- Deleted Items 148
- Inbox 145
- Sent Items

Jennifer.Winkler@seattle.gov

- Inbox
- Drafts
- Sent Items
- Deleted Items
- (7 yr) Programs_Projects
 - Admin Files for Departments
 - IT Projects
- Conversation History
- eclips
- jen
- Junk Email [1]
- Outbox
- Quarantine
- Reference
 - Admin
 - ARMA Temp
 - RIM News Articles
 - RSS Subscriptions
- Search Folders
- LEG_CRMP
- Archive - Jennifer.Winkler@seattle.gov
 - Deleted Items
 - Mimosa Archive
 - 3 Yr Retention
 - 6 Yr Retention
 - CityWide PRA team
 - IT issues
 - Cabinet
 - Search Folders



(7 yr) Programs_Projects



Treat the Reference Folder just like the Cabinet Folder



In 2013, Mimosa Archive appears as:
Online Archive – first.last@seattle.gov
In 2010, appears as:
Archive – first.last@seattle.gov



May take to 24-48 hours for the Mimosa Archive to migrate



Mimosa Migration



**STOP USING OLD POLICY FOLDERS
1 WEEK PRIOR TO MIGRATION**

- **Everything from Mimosa will copy over to ZyLAB in the original folders and structure**
 - **2 options**
 - **Clean and/or move**
 - **Leave as is**
- YOU decide which option works best for you**
- **Shortly after you migrate, the former Mimosa Policy Folders will be deleted from Outlook and replaced with the ZyLAB folders**
 - **DO NOT move mail into the old Mimosa folders**

Example of Re-Managed Folders

Mimosa Legacy Folders after migration

- ▲ Online Archive - Joanne.Anton@seattle.gov
- ▷ Deleted Items
- ▲ Mimosa Archive
 - 3 Yr Retention
 - ▲ **6 Yr Retention**
 - ▲ IT Projects
 - Email Migration ← **Current project**
 - Word 2010 Classes ← **Completed project**

Current Projects = Move to NEW Retention/Policy folder

- ▲ (7 yr) Programs_Projects
 - Email Migration**
 - O365 Portal
 - Office 365
 - Portal Analytics
 - SPO

Completed Projects = Leave in Mimosa Legacy

- ▲ Mimosa Archive
 - 3 Yr Retention
 - ▲ **6 Yr Retention**
 - ▲ IT Projects
 - Word 2010 Classes

During and After Upgrade and Migration

In 2016, the City will implement an Outlook plug-in that will show up on the Ribbon. This tool will allow users to see items in their ZyLAB archive after the auto-delete policy has removed the items from Outlook.

Until that time, all policies in Outlook have been modified to accommodate our daily activities.

ITEM	2015	2016
Inbox	Increases to 90 days	Will stay at 90 days
Sent items	Increases to 90 days	will stay at 90 days
Policy folders	all items viewable until 2016	items viewable for 2.5 years
Mimosa Archive	all items viewable until 2016 in the Online Archive.	Online Archive Folder will be deleted and former Mimosa items NOT MOVED can only be viewed via ZyLAB plug in

A Quick Look at Outlook 2013 and the New OWA

First Peek: Full Look of Outlook 2013

The screenshot displays the Outlook 2013 interface for the account 'Joanne.Anton@seattle.gov'. The ribbon at the top includes 'FILE', 'HOME', 'SEND / RECEIVE', 'FOLDER', and 'VIEW'. The 'HOME' ribbon is active, showing various actions like 'New Email', 'Clean Up', 'Delete', 'Reply', 'Forward', 'Move', 'Rules', 'OneNote', 'Unread/Read', 'Categorize', 'Follow Up', 'Search People', 'Address Book', 'Filter Email', 'Store', and 'My Account'.

The left sidebar shows the 'Favorites' pane with folders like 'Inbox', 'Sent Items', and 'Deleted Items'. Below this is the 'Joanne.Anton@seattle.gov' account section, which includes a red-bordered box around the '(7 yr) Programs_Projects' folder and its subfolders (EXO, O365 Portal, Office 365, Portal Analytics, SPO). Another red-bordered box highlights the 'Mimosa Archive' folder with subfolders for '3 Yr Retention', '6 Yr Retention', and 'Cabinet'. At the bottom of the sidebar, a red-bordered box highlights the navigation pane with 'Mail', 'Calendar', 'People', 'Tasks', 'Notes', and 'Folders'.

The main pane shows the 'Current Mailbox' with a list of emails. The selected email is from 'Salwitz-C, David-c' with the subject 'RE: Reference Folder Change', dated 'Tue 9/8/2015 2:20 PM'. The email body contains a message to Joanne asking for a screenshot to replace an existing one in the Exchange Online dropsheet. The email also includes a 'From' field with 'Anton, Joanne' and a 'Subject' field with 'Reference Folder Change'.

On the right side, the 'Calendar' pane shows a view for 'September 2015'. The date '8' is highlighted in blue. Below the calendar, the 'Today' and 'Tomorrow' sections show a schedule of tasks, including 'Daily EXO Check', 'Skype Meeting', 'Dentist', 'end user EXO/EAED traini...', 'DIT_SMT_2790', and 'Abby Vet bloodwork'.

The bottom status bar shows 'ITEMS: 209', 'ALL FOLDERS ARE UP TO DATE.', 'CONNECTED TO: MICROSOFT EXCHANGE', and a 100% zoom level.

Clarification – “Retention” Message Actually Means “AutoDelete” in InBox

Outlook 2010

Appears at bottom of the page



Retention Policy: Inbox 90 days (90 days) Expires: 10/26/2015

Outlook 2013

Appears in the To/From



Tue 7/28/2015 8:13 AM

Smith, Shannon

RE: Retention policy language

To Jacobson, John; West, Bonnie; Sakamoto, Scott; Anton, Joanne; Winkler, Jennifer

Cc Goad, Angela; Roberts, Tom; Carlstedt, Ken

Retention Policy Inbox 90 days (90 days)

Expires 10/26/2015

You replied to this message on 7/28/2015 8:35 AM.

Login to Outlook Web App 2013

In Browser of your choice, enter:

<http://email.seattle.gov>

Or from a City computer click
the OWA Icon on your desktop



Enter your
Domain\User
Name & Password



City of Seattle

WARNING:

This is a proprietary system of the City of Seattle and is for use by authorized individuals only.

Use of this system or any other computer system of the City of Seattle constitutes an express consent to monitoring at all times. If monitoring of any City system for either administrative, enforcement, or management purposes reveals possible violations of criminal statutes, all relevant information will be provided to law enforcement officials. Individuals using this or any other City computer system or related information without proper authorization will be subject to possible internal disciplinary actions, civil and/or criminal prosecution. By proceeding beyond this screen you are acknowledging that you understand and accept the content of this notice.

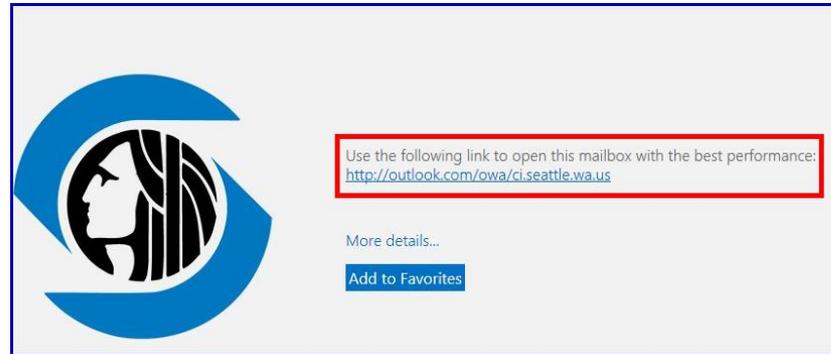
Domain\user name:

Password:

 sign in

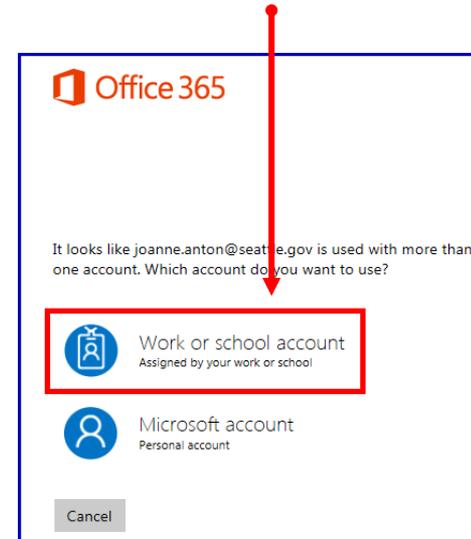
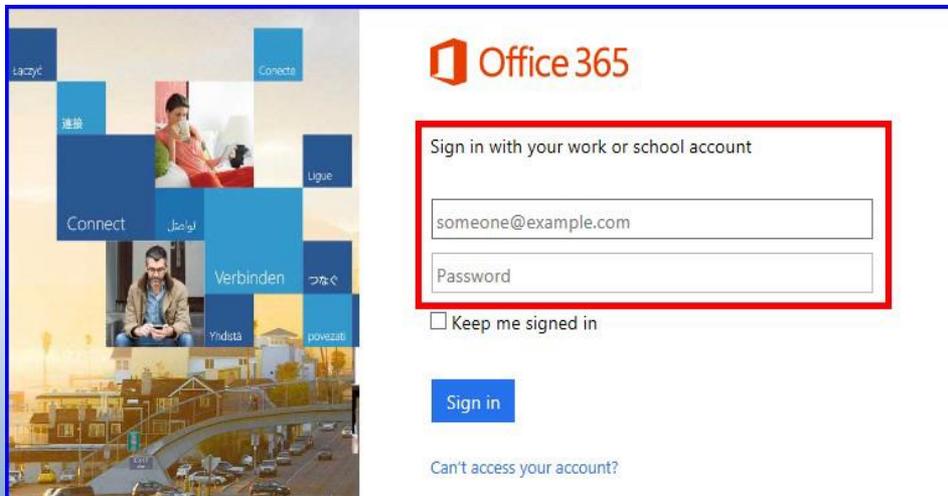
Login to Outlook Web App 2013

Click the Link



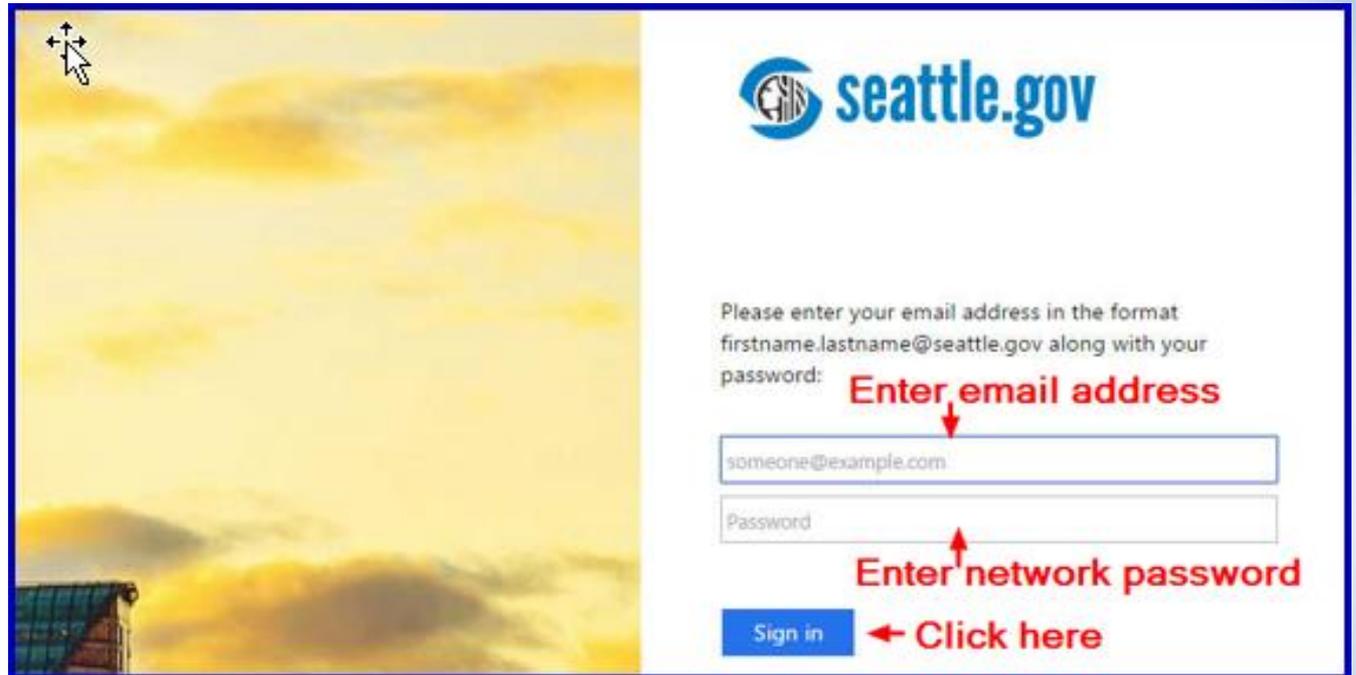
Sign into Office 365

Click WORK if you have a personal Microsoft account



Login to Outlook Web App 2013

Enter your
email
address
and
password



 **seattle.gov**

Please enter your email address in the format
firstname.lastname@seattle.gov along with your
password:

Enter email address

Enter network password

Sign in ← **Click here**

Overall View of Old OWA

Microsoft Office Outlook Web Access
Connected to Microsoft Exchange

File Edit View Favorites Tools Help

Find Someone Options Simpson, Lisa Log Off

Mail << Inbox (20 Items, 12 Unread) Help

New [Icons]

Search Inbox

Arrange by: Date Newest on top

Today

- Winkler, Jennifer 9:47 AM RE: ARM Ordinance
- Winkler, Jennifer 9:40 AM Update on project
- Winkler, Jennifer 9:35 AM Change to time for meeting
- Winkler, Jennifer 9:35 AM ARM Ordinance

Yesterday

- Winkler, Jennifer Mon 3:21 PM City Council Meeting June 24th
- Winkler, Jennifer Mon 3:20 PM Policy Draft for Team Review: Archive Management

Last Week

- Bettger, Andrea Wed 6/24 Sending Records to Storage!
- Bettger, Andrea Wed 6/24 Introduction to RIM Training
- Bettger, Andrea Wed 6/24 Seattle Conservation Core Room Inventory
- Bettger, Andrea Wed 6/24 Lunch today at 1 p.m.
- West, Bonnie Tue 6/23 Sharing invitation: West, Bonnie - Calendar
- Anton, Joanne Mon 6/22 Accepted: Testing send on behalf permissions...

Two Weeks Ago

- Winkler, Jennifer 6/19/2015 RE: Retention Folders
- Anton, Joanne 6/18/2015 RE: Retention Folders
- Dyer, James 6/18/2015 RE: Retention Folders
- Remington-C, Chris-c 6/18/2015 Test message
- Anton, Joanne 6/17/2015 Starbucks
- Anton, Joanne 6/17/2015 Thanks for Your Message

Items 1 to 20 of 20

Reply Reply to All Forward

Thanks for Your Message

Anton, Joanne
Sent: Wednesday, June 17, 2015 4:36 PM
To: Simpson, Lisa

Hi Lisa,

I can answer all your questions. I'll send you a Meeting Request for coffee.

 *Joanne*
Joanne Anton
Department of Information Technology
Office 365 Project Team
684-7931

Mail Calendar Contacts Tasks Documents Public Folders

OWA – Outlook Web App 2013

The screenshot displays the Outlook Web App 2013 interface. At the top, the navigation bar includes 'Office 365', 'Outlook', and the 'City of Seattle' logo. The left-hand navigation pane shows various folders, with several highlighted by red boxes: '(7 yr) Programs_Projects', 'Reference', 'Online Archive', and 'Mimosa Archive' (which includes sub-folders for '3 Yr Retention', '6 Yr Retention', and 'Cabinet'). The main inbox area shows a list of emails, with the selected email from 'Salwitz-C, David-c' titled 'Reference Folder Change' highlighted. The right-hand pane displays the content of this email, which discusses folder changes and includes a reply from 'Anton, Joanne'.

Navigation Pane (Left):

- New
- Search Mail and People
- Folders
 - Favorites
 - Anton, Joanne
 - Inbox
 - Drafts
 - Sent Items
 - Deleted Items
 - (7 yr) Programs_Projects**
 - Checklist
 - Contact List
 - Conversation History
 - Junk Email (26)
 - Notes
 - Reference**
 - RSS Subscriptions
 - Online Archive**
 - Deleted Items
 - Mimosa Archive**
 - 3 Yr Retention
 - 6 Yr Retention
 - Cabinet
 - Deleted Items (148)
 - Inbox (145)
 - Sent Items

Inbox (Center):

INBOX Conversations by Date

All Unread To me Flagged

Winkler, Jennifer (No subject) No preview is available. 3:17p

Davis, Joyce ! 2:51p
Sept 10th - Mayor's Service Award Ceremony (RSVP List)
FYI: See email below..... Joyce Davis From: Cawaling, Cindy Sent: Tuesday, Septemb...

Salwitz-C, David-c ← 2:22p
Reference Folder Change
Hi Joanne, Would you mind sending a full sized screenshot (without the red boxes)...

Salwitz-C, David-c ← 2:02p
Updated iPhone and Android mobile instructions
Attached... Dave Salwitz O365 Communications Manager City of Seattle, Departmen...

Winkler, Jennifer 1:26p
Winkler, Jennifer has shared 'ZyLabfinal'
replaced the one reference to (2 yr). New version is posted, I removed the old versi...

Winkler, Jennifer 1:18p
can you send me a screenshot
Will this work From: Anderson, Steven Sent: Tuesday, September 08, 2015 1:16 PM...

Winkler, Jennifer; Bettger, Andrea 11:13a
Substantive Communication
Thanks for the proposed changes. Joanne and I met last week and I'll be meeting wi...

Winkler, Jennifer; Salwitz-C, David-c ← 11:10a
"The Start" of an Answer to Michael's Question
Was this still needed? I can't recall the final determination From: Anton, Joanne Sen...

Lilly-Harris, Jacqueline; Goad, Angela 8:43a
Latest Folder List
I can communicate something out to the pilot users at SPU. Just let me know when...

McNees, Kelli; Lilly-Harris, Jacqueline; Winkler, Jennifer ← 7:20a
Email Migration for OCC
When is the OCC scheduled? I still have the rooms booked for 10/6 & 10/7. Other t...

Yesterday

My Starbucks Rewards Mon 6:02p
Buy any lunch item and get 25% off
Enjoythisdeliciousofferby9/14 | Viewonline Come in for lunch and get 25% off any l...

Last week

Smith, Shannon

Reference Folder Change (Right Pane):

SD Salwitz-C, David-c
Tue 9/8/2015 2:55 PM
Perfect. Thanks!

AJ Anton, Joanne
Tue 9/8/2015 2:25 PM
Like so?

← Reply ← Reply all → Forward ...

SD Salwitz-C, David-c
Tue 9/8/2015 2:22 PM
Mark as unread

To: Anton, Joanne;

- You replied on 9/8/2015 2:25 PM.

Hi Joanne,

Would you mind sending a full sized screenshot (without the red boxes) that I can use to replace the one I already have in the Getting Started with Exchange Online dropsheet?

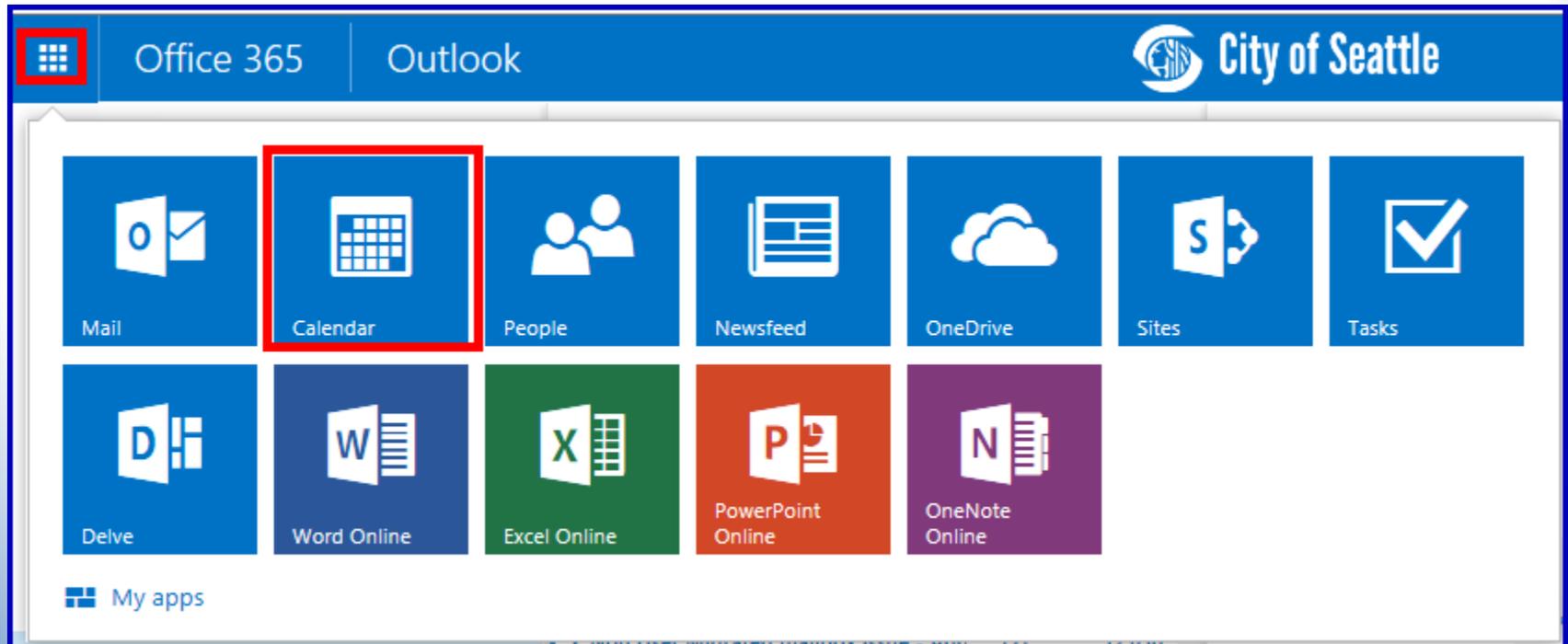
I'm looking for a shot that shows the new and legacy folders, similar to the one that's currently in the dropsheet.

Thanks! - dave

AJ Anton, Joanne
Tue 9/8/2015 12:33 PM
All, Recapping the change we agreed to in the Friday meeting. We are removing the (2yr...

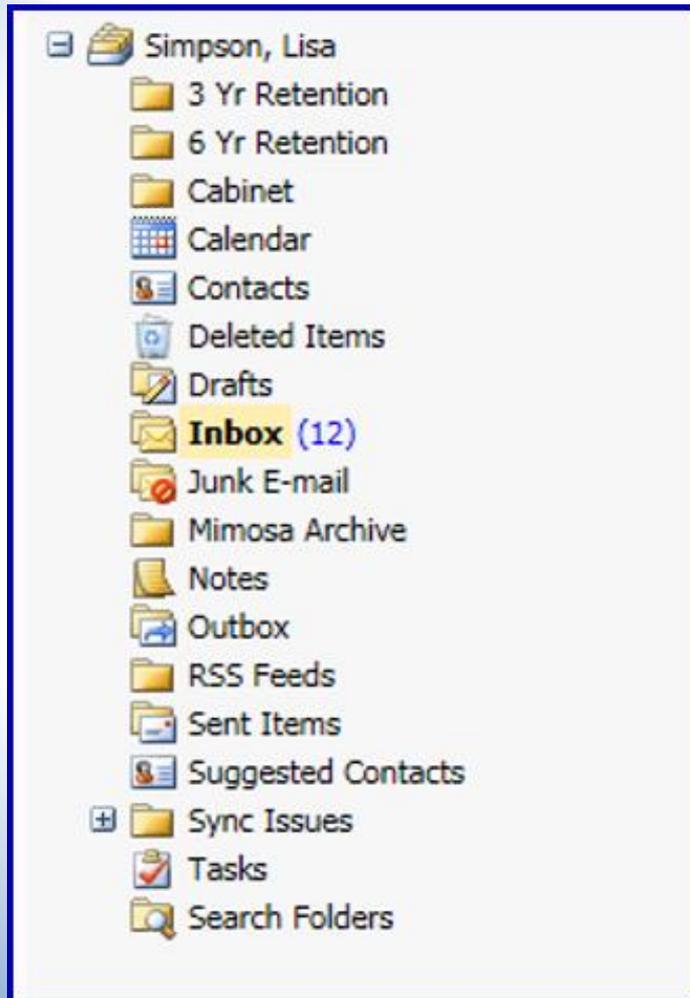
How to Navigate in OWA

Click the App Launcher  in the left corner and select function

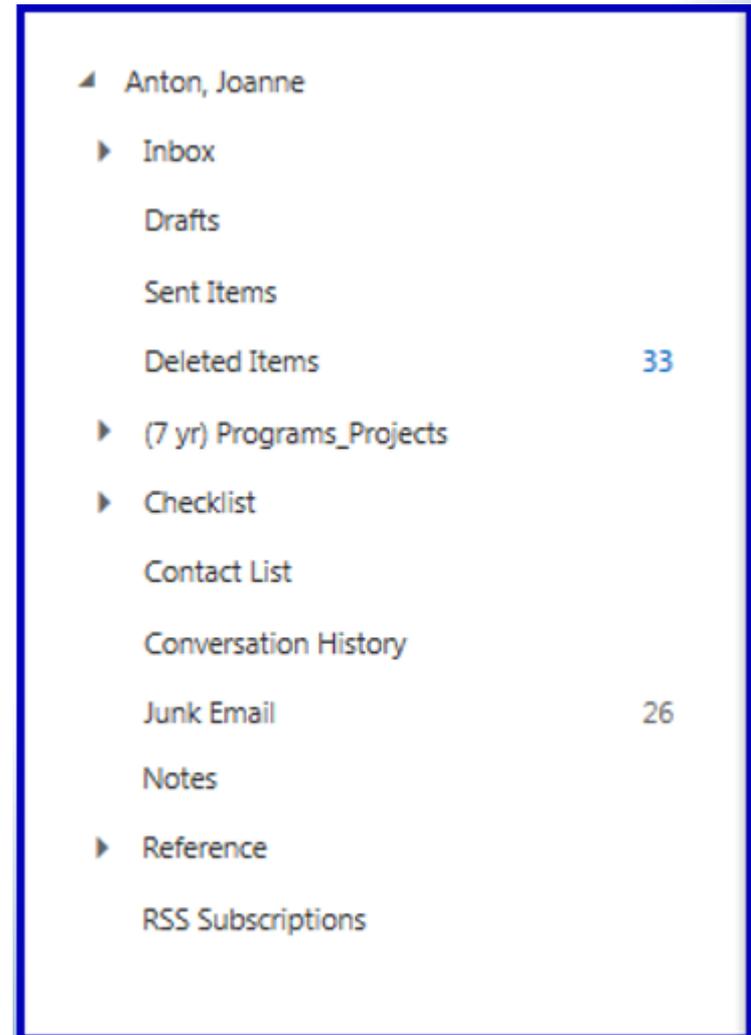


OWA Views – Mailbox Folders

OWA 2010

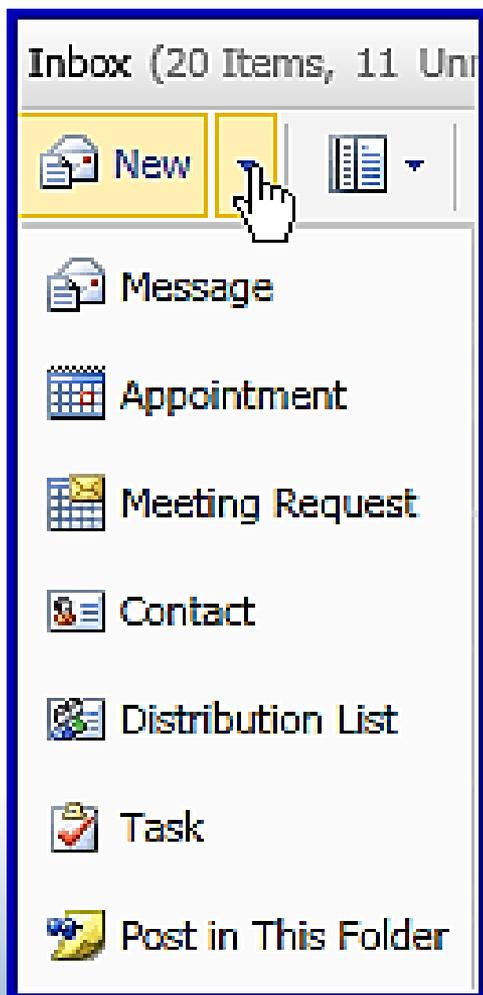


OWA 2013

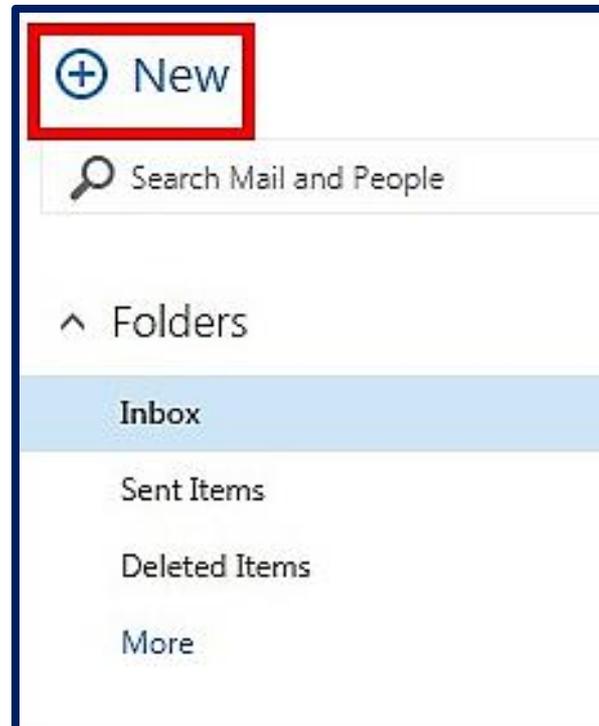


OWA Views – Send New Message

Old OWA

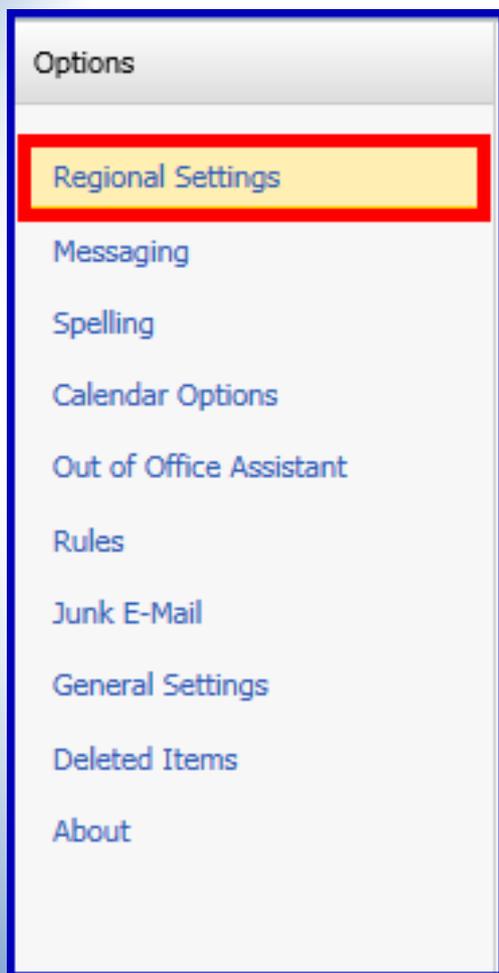


New OWA

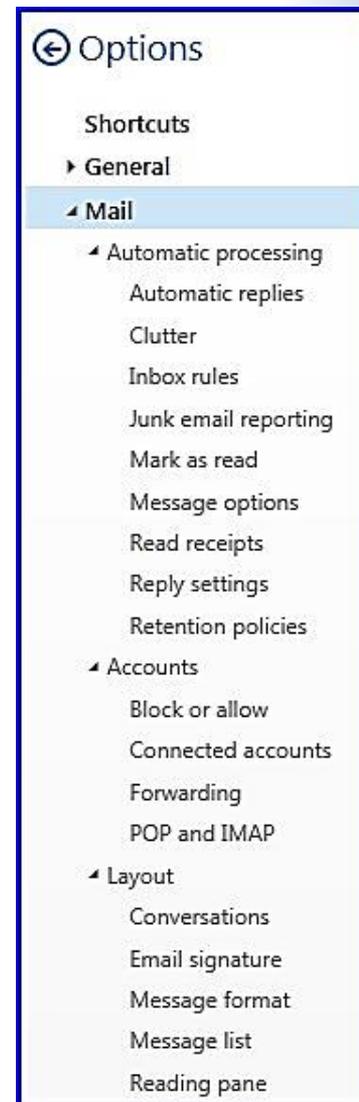
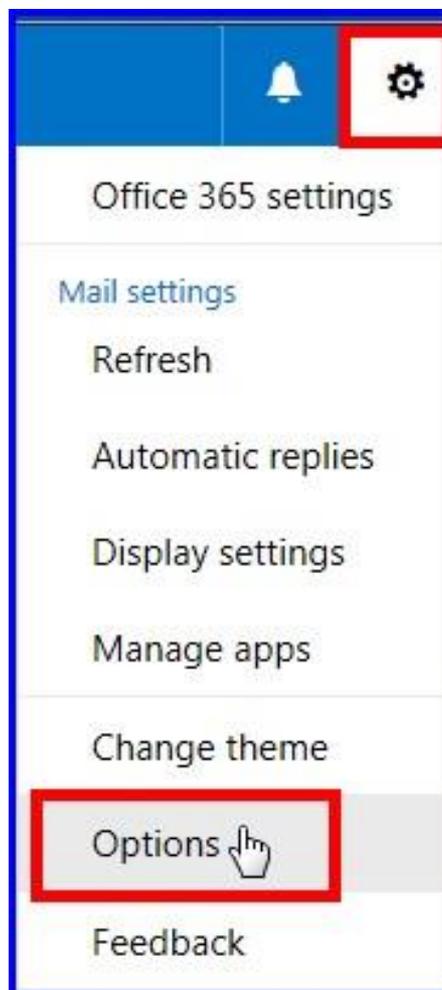


OWA Views – Email General Options

Old OWA



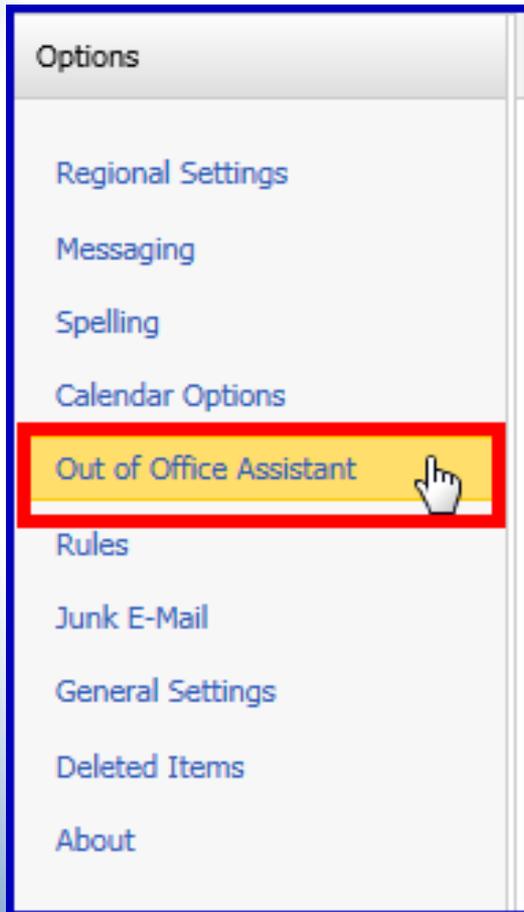
New OWA



OWA Views

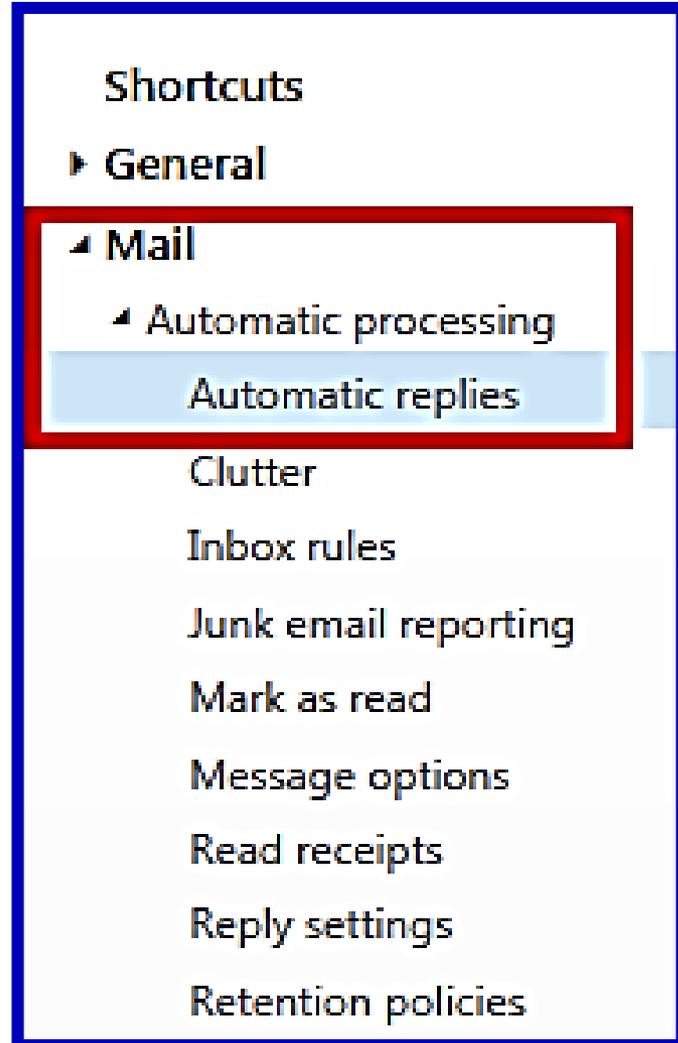
Out of Office/Automatic Replies

Old OWA



**Out of
Office
Assistant**

New OWA

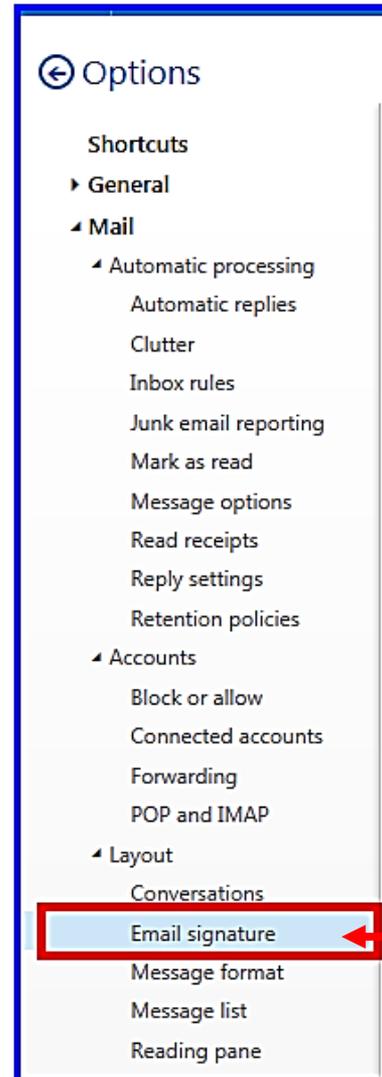


OWA Views – Email Signature

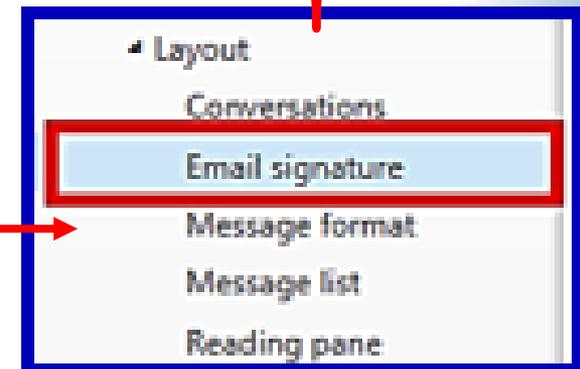
Old OWA (partial view)



New OWA



Email Signature

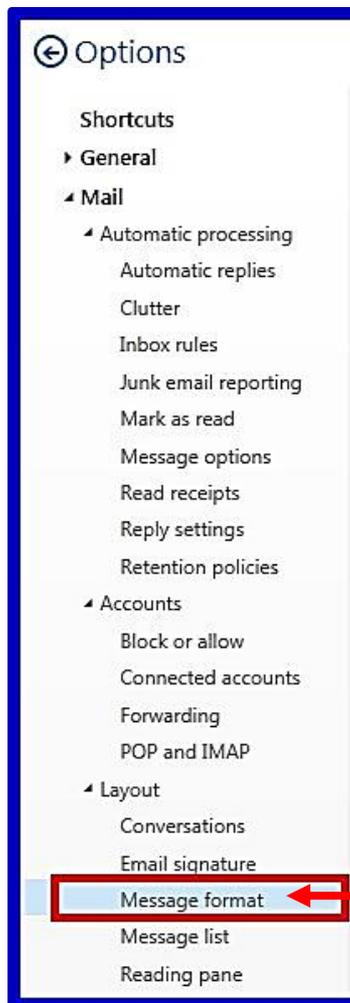


OWA Views – Message Format

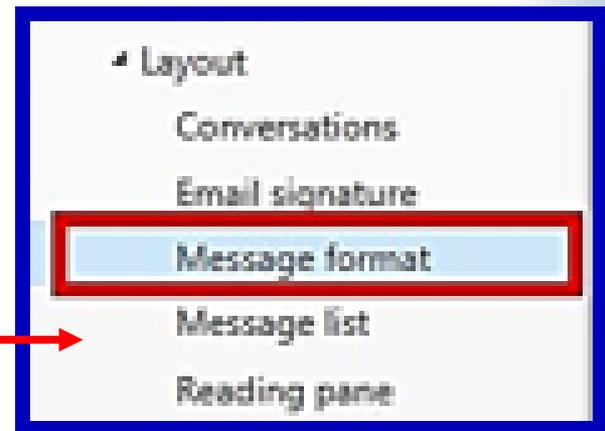
Old OWA (partial view)



New OWA

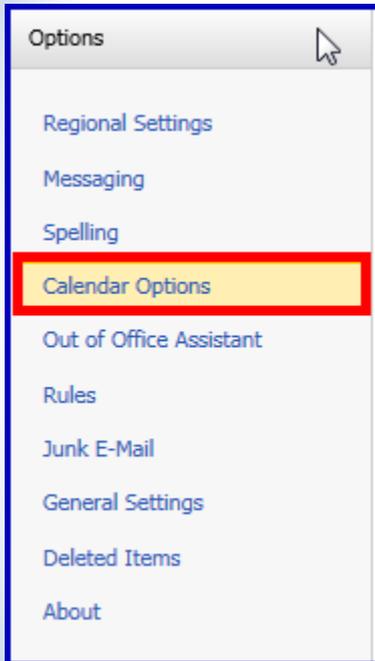


Message Format



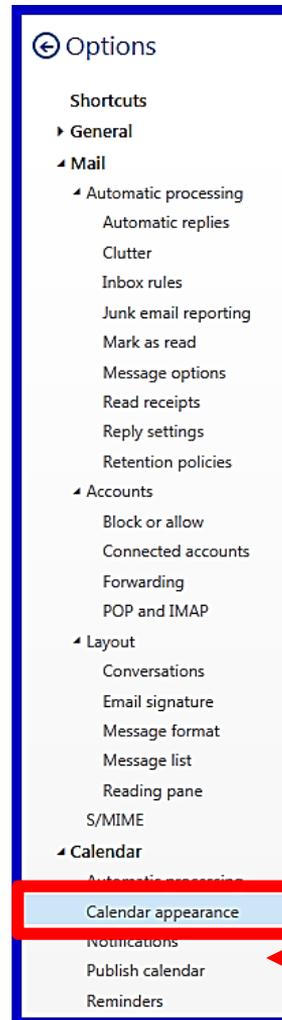
OWA Views – Calendar Appearance

Old OWA

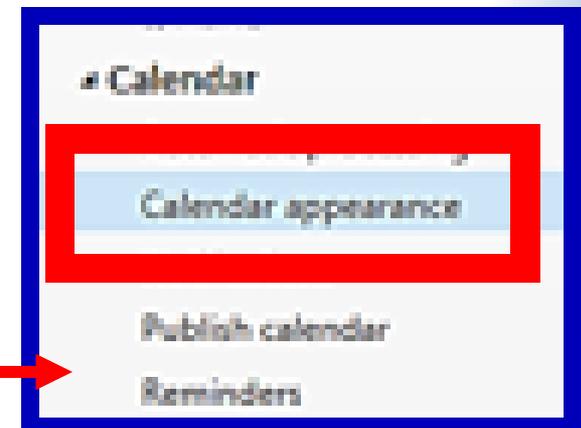


Calendar Options

New OWA



Calendar Appearance



Navigate to People



People - The City Directory in OWA

The screenshot displays the Outlook interface for the City of Seattle. The top navigation bar includes 'Office 365', 'Outlook', and the 'City of Seattle' logo. The left sidebar shows navigation options: 'New', 'Search directory', 'My contacts', 'Directory' (highlighted with a red box), and 'Groups'. The main content area is titled 'DIRECTORY' and 'BY DISPLAY NAME'. A list of directory entries is shown, with '2015Microsurfacing' selected. The right pane displays details for the selected entry, including a green 'MI' icon, the name '2015Microsurfacing', and various tabs: 'Contact', 'Notes', 'Organization', and 'Groups'. The 'Email' section shows the email address '2015Microsurfacing@seattle.gov'. The 'Profile' section shows a link to a SharePoint profile page. The 'Work' section lists the department as 'DOT' and the company as 'Transportation'. The 'Directory' section is also visible.

Initials	Name
MI	2015Microsurfacing
HE	4-HELP (4-4357)
AL	Aagard, Lori
AD	Aakervik, Dag
AL	Aana, Leialoha
AA	Aar, Abdimallik
AA	AaronP
AR	Abad, Richard
AR	Abanes, Rick

2015Microsurfacing

Contact Notes Organization Groups

Email
Email: 2015Microsurfacing@seattle.gov

Profile
<https://seattlegov-my.sharepoint.com/p...>

Work
Department: DOT
Company: Transportation
Directory

Linked contacts

Need Technical Help?

- Check out the Office 365 Learning Portal at: <http://www.seattle.gov/office-365-learning-portal>
- Call the Service Desk at 4-HELP
 - Or your dept specific helpdesk



Please report issues immediately so the proper individuals can begin coordinating a fix

NEED HELP ON WHAT TO RETAIN

- ◆ Call Records Management 684-8154
- ◆ Visit inweb page:
 - ◆ <http://inweb/clerk/RecordsManagement/default.htm>

