



Saving Email Over 2 Years

Permanent Storage of Important Records

Excerpt from the, “Email Retention Policy” (OCIO 14-02)

User Responsibility

Users should not use e-mail to store important or official District records. Where official records are required to satisfy a particular purpose or retention period, users are expected to follow the applicable records retention policy and procedures and generate a copy or other permanent unalterable form of recording other than e-mail to preserve the record. The types of documents include, but are not limited to, internal policies, official correspondence, contracts, real estate related documents, personnel files, and other District documents which must otherwise be maintained for greater than six (6) months.

Users are required to recognize the need to protect confidential data and follow all guidelines and record retention policies to protect District records.

Permanent Storage of Important Email Records

Per the Email Retention Policy, important records received via email that must be maintained for greater than six (6) months can be saved in a permanent unalterable form of recording other than e-mail to preserve the record. For instance, Users may right-click on important attachments and save them to their OneDrive or other permanent storage location. In addition, Users may open and print email messages or save them to PDF to preserve certain important records as described in the policy.

1. Saving as a PDF (Requires Adobe Acrobat – HelpDesk x7208):
 - a. From within the Microsoft Outlook desktop application,
 - b. Right-click on an email message
 - c. Select, **Convert to Adobe PDF**
 - d. Designate OneDrive as the Storage Location
 - e. Select, “Save”
 - f. Complete

Note: Instructions on setting up OneDrive.

https://ess.bart.gov/portal_docs/Flyers/oneDrive.pdf

