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Issue Date: August 27 2014	Subject: Save an Email from Outlook
Review Date:	
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SUBJECT:

Save an Email from Outlook

PURPOSE:

Procedure to save an Email from Outlook

PROCEDURE:

Our organization utilizes Email as a central means of communication by which business decisions are documented. When working in Outlook, you will want to retain certain messages as part of your comprehensive subject file.

Email can be grouped into three main categories: Transitory, Personal or Corporate.

Transitory Email is used to facilitate business, but does not need to be retained for business purposes. For example: notification of an event or Email simply used as a method to transmit an attachment(s).

Personal Email is a message of a personal nature and has no relevance to the organization, unless the Email incorporates personal and work information. It is then considered a work related record.

Corporate Email relates to the business of the organization and must be retained as a record. It forms part of your electronic file on a particular subject and without it, your file would be incomplete. As such it is a record and should be filed with related documents on the same subject. For example:


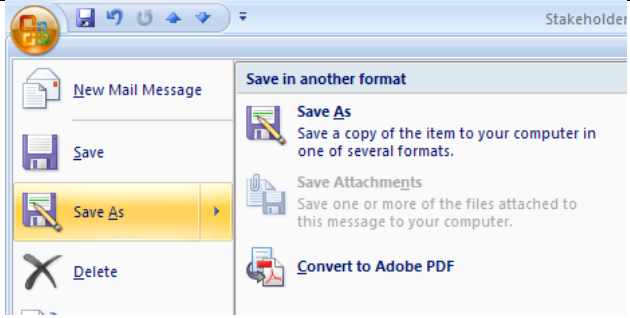
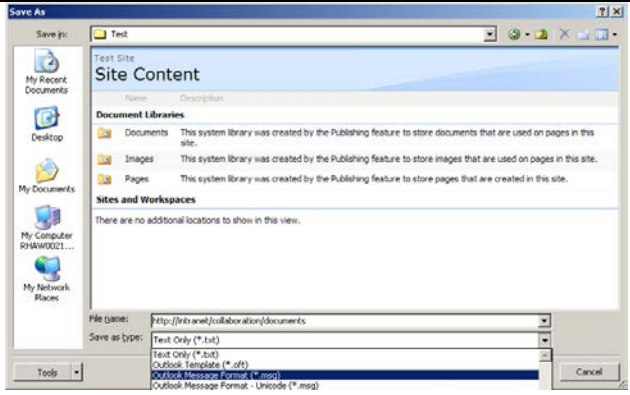

- Communication between staff in which formal approval is recorded
- Direction related to a course of action or decision
- Business correspondence received from an external agency, other than general information such as their newsletters etc. which could be retrieved from the source if necessary.

There are three options for you to consider when deciding how to save a message:


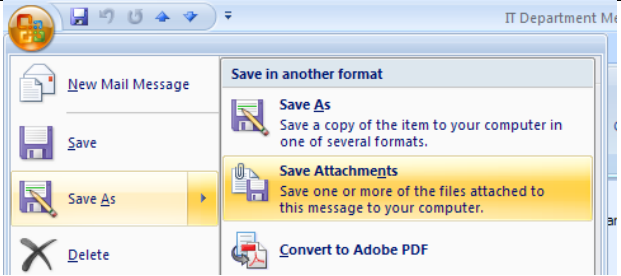
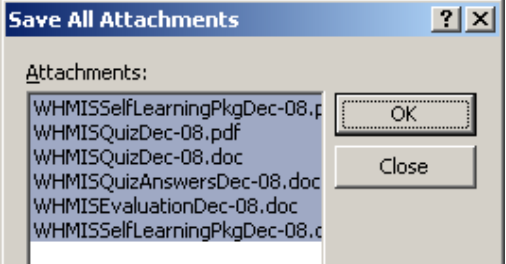
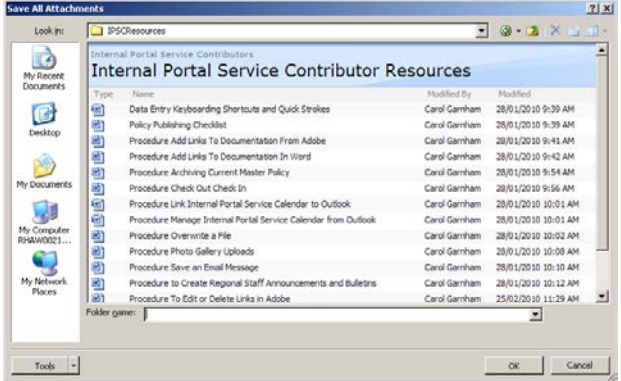
- Save the Email message because it, in and of itself, contains a decision or important information that may need to be referred to at some point.
- Save the Email, as above, and all related attachments as a package.
- Save the attachment(s) without saving the Email message when the Email mail is strictly transitory i.e. is just used as a method to transmit the attachment which contains the decision or important information.

There are two related procedures below; To Save an Email Message with, or without, Attachments and To Save the Email Attachment(s) only. You would want to save the email attachments only when the Email Message itself is purely transitory and does not contain any required information.

To Save an Email Message with, or without, Attachments

<ol style="list-style-type: none"> From Outlook, open the message you want to save. Click . A drop down will appear, Click Save As, Save As 	 <p>The screenshot shows the Outlook interface with the 'Save in another format' menu open. The menu options are: 'Save As' (with a pencil icon), 'Save Attachments' (with a document icon), and 'Convert to Adobe PDF' (with a PDF icon). The 'Save As' option is highlighted.</p>
<ol style="list-style-type: none"> A new dialogue box will open. Click My Network Places. A list of network places will appear. Select the appropriate Internal Portal Library for your collaborative work site. Click the dropdown arrow for Save as type: Select Outlook Message Format (*.msg) 	 <p>The screenshot shows the 'Save As' dialog box. The 'Save in' location is set to 'Test'. The 'Save as type' dropdown is open, showing options: 'Text Only (*.txt)', 'Outlook Template (*.oft)', 'Outlook Message Format - Unicode (*.msg)', and 'Outlook Message Format - Unicode (*.msg)'. The 'Outlook Message Format - Unicode (*.msg)' option is selected.</p>
<ol style="list-style-type: none"> Click Save. The Dialogue Box will close. Your screen will revert to the Email. Close the Email message. Navigate to your collaborative work site. Confirm that your email has been saved. The message format icon will be displayed  You can now delete the Email message from your Outlook mailbox. 	

To Save the Email Attachment(s) only

<ol style="list-style-type: none"> From Outlook, open the message with the attachments you want to save. Click  A drop down will appear, Click Save As, Save Attachments 	 <p>The screenshot shows the Outlook interface with the 'Save in another format' menu open. The 'Save Attachments' option is highlighted in yellow. Other options include 'Save As', 'Convert to Adobe PDF', and 'Delete'.</p>
<ol style="list-style-type: none"> A new dialogue box will open with a list of attachments. <p>Click OK</p>	 <p>The screenshot shows a 'Save All Attachments' dialog box. It lists several attachments: WHMISSelfLearningPkgDec-08.p, WHMISQuizDec-08.pdf, WHMISQuizDec-08.doc, WHMISQuizAnswersDec-08.doc, WHMISEvaluationDec-08.doc, and WHMISSelfLearningPkgDec-08.c. There are 'OK' and 'Close' buttons.</p>
<ol style="list-style-type: none"> A new dialogue box will open. <p>Click My Network Places. A list of network places will appear. Select the appropriate Internal Portal Library for your collaborative work site.</p> <ol style="list-style-type: none"> Click OK 	 <p>The screenshot shows the 'Save All Attachments' dialog box with the 'Look in:' field set to 'IPSCResources'. A list of network places is displayed, including 'Internal Portal Service Contributors' and 'Internal Portal Service Contributor Resources'. The 'Internal Portal Service Contributor Resources' folder is selected.</p>
<ol style="list-style-type: none"> The Dialogue Box will close. Your screen will revert to the Email. Close the Email message. Navigate to your collaborative work site. Confirm that your attachments have been saved. You can now delete the Email message from your Outlook mailbox. 	