

## Quick Guide - July 12, 2013

### How to set up Gmail for managing NARA's email records in the cloud

This Quick Guide explains how to set up and use Google Mail (Gmail) to facilitate automated records capture and management. It also addresses how to avoid capturing and managing non-records in the new DoD-STD 5015.2 certified email archive ([ZL Unified Archive](#)). This Quick Guide is just part of the story; more information is available in Capstone page on NARA-a-Work and at the [On the Record Blog](#) on the ICN.

#### 1. How will NARA capture and manage my Gmail records under Capstone?

January 22, 2013 is the designated effective date for Capstone (i.e., when IT Pilot users began using Google mail). Email, tasks, and calendar appointments created and received after January 21, will be captured and automatically categorized as permanent or temporary records under Capstone, by default. NARA's print and file policy applies to email records created or received before January 22, 2013. This means that all email objects dated before January 22, 2013, in the email archive are considered as convenience copies. However, you may manually categorize these items as temporary, permanent, or non-records in ZL Unified Archive, as needed. Objects categorized as Non-Records in the archive are deleted after ten calendar days.

Once capture begins, the archive system continuously crawls your Gmail box. It copies and auto-categorizes email messages, tasks, and calendar appointments that are 90 days old AND sent and received after January 22, 2013 (hereafter "email records") to its recordkeeping repository. It excludes trash, spam, draft and objects labeled as "Non-Record". Email records stored in Gmail become "convenience copies" after capture (91 days old). You may keep or delete them as needed.

The archive retains email records as:

- Permanent, for designated senior officials; or
- Temporary, for everyone else and will be kept for 7 years.

#### 2. What will happen if I chose not to manage my email?

The Capstone approach minimizes the need for end-user involvement in day to day email recordkeeping. If you choose not to manage your Gmail objects, the archive will capture and manage them automatically as records, based on your role at NARA. However, you can stay lean and green by taking these steps to manage your Gmail.

#### 3. How can I exclude personal and non-record email from recordkeeping capture?

**If you chose to do so, you have 90 days to delete useless objects, identify them as spam, or label non-record information.** You should label non-records in your mailbox to avoid capture. **Create a non-record label** by clicking on settings, labels, create new label. Name your label "non-record" exactly, as the archive system won't recognize variations of this. **Use the non-record label** by selecting non-record objects, click in the box next to the message(s), clicking "move to" or "labels", and select the non-record label. If you don't label your non-records in Gmail and they get captured in the archive, you have 180 additional days to change the default category in ZL Unified Archive. (e.g., from temporary to non-record).

#### 4. What's a non-record under Capstone?

Under Capstone, email, tasks, and calendar appointments are:

- Non-records when they are not business-related. For example, messages about lunches, holiday parties, water clubs, etc. are not Federal records.
- Records when they document your NARA business activities.

For more information contact Corporate Records Management at 301-837-0880 or [Recordsmatter@nara.gov](mailto:Recordsmatter@nara.gov).