HOW TO SAVE AND FILE LOTUS NOTES EMAILS

Email messages that are university records should be filed and retained with other records to which they relate. Saving emails to a unit's shared drive is an effective way to extract them from the email application and manage them using a proper recordkeeping folder structure.

Using **Adobe Acrobat Pro**, you can easily convert individual Lotus Notes email messages or entire email folders to PDF. Any file attachments within the email message are automatically saved within the PDF and can be open just like in Lotus Notes. You can also choose to automate these actions by scheduling automatic email archiving to be performed on your email folders.

This *How-to* guide is divided into three sections which provide illustrated instructions on manually selecting and converting specific emails or folders in Lotus Notes, and how to set up a schedule for converting your email folders to PDFs in the appropriate shared drive location.

For additional tips on managing your emails and records, visit the Information and Privacy Office's [Tools and Tips](#) webpage and download:

[Tip Sheet #5 Email Management](#)

[Tip Sheet #3 Transitory Records](#)

[Tip Sheet #6 Naming Conventions for Electronic Files and Folders](#)

For information on managing your unit's shared drive, see the IPO's guideline on [Organizing and Maintaining Shared Drives](#).

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Technical Note:

All York faculty and staff have access to Adobe Acrobat Pro on university workstations. When Adobe Acrobat Pro is installed, the controls that activate an email conversion to PDF appear in Lotus Notes, under the *Actions* menu (see below).
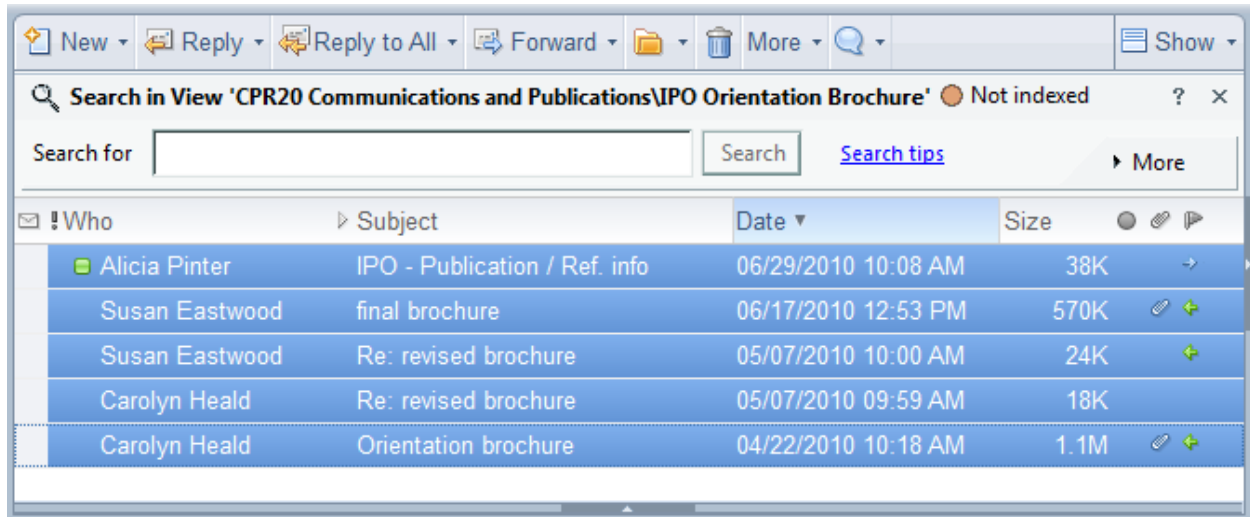
For further technical support contact your local IT support group.
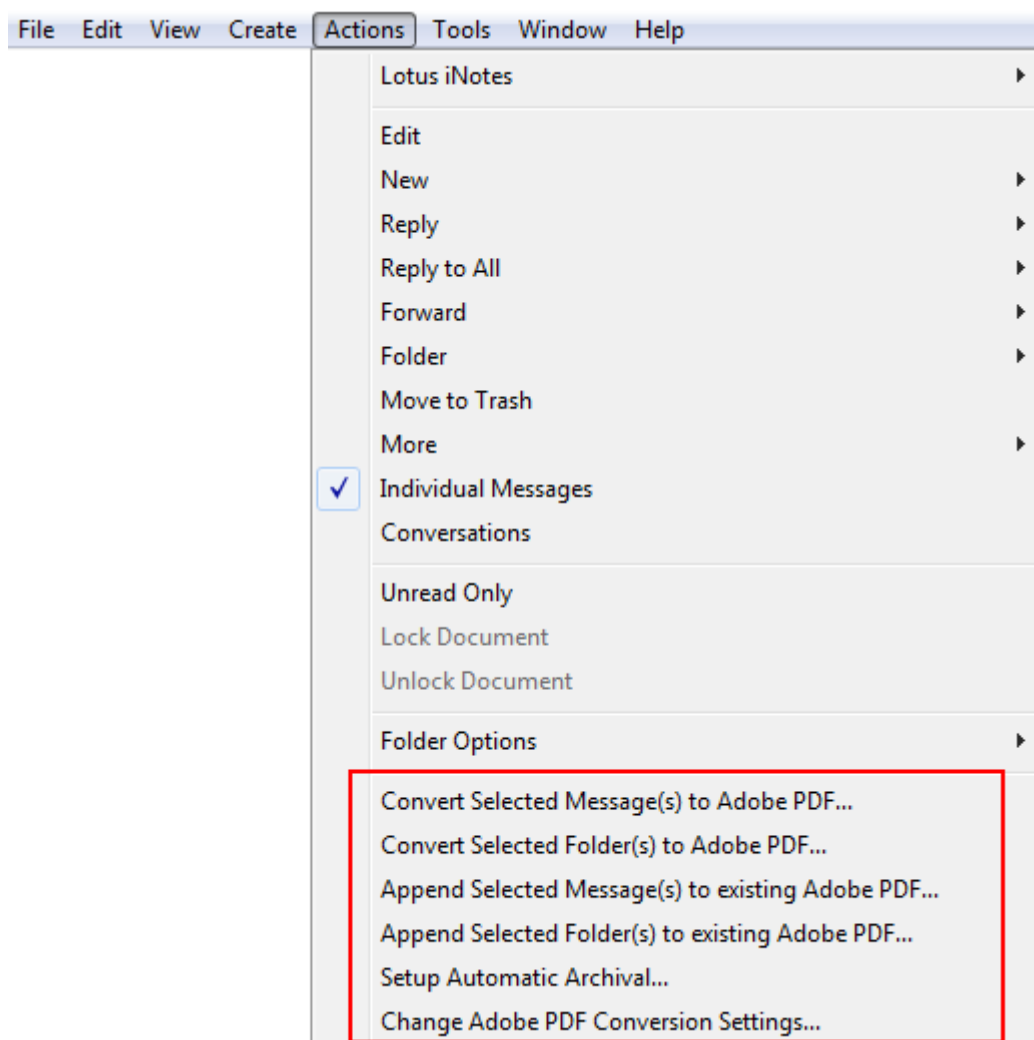
HOW TO SAVE AND FILE LOTUS NOTES EMAILS

Section A: How To Save And File Individual Emails

1. In Lotus Notes, select the email messages to be converted:

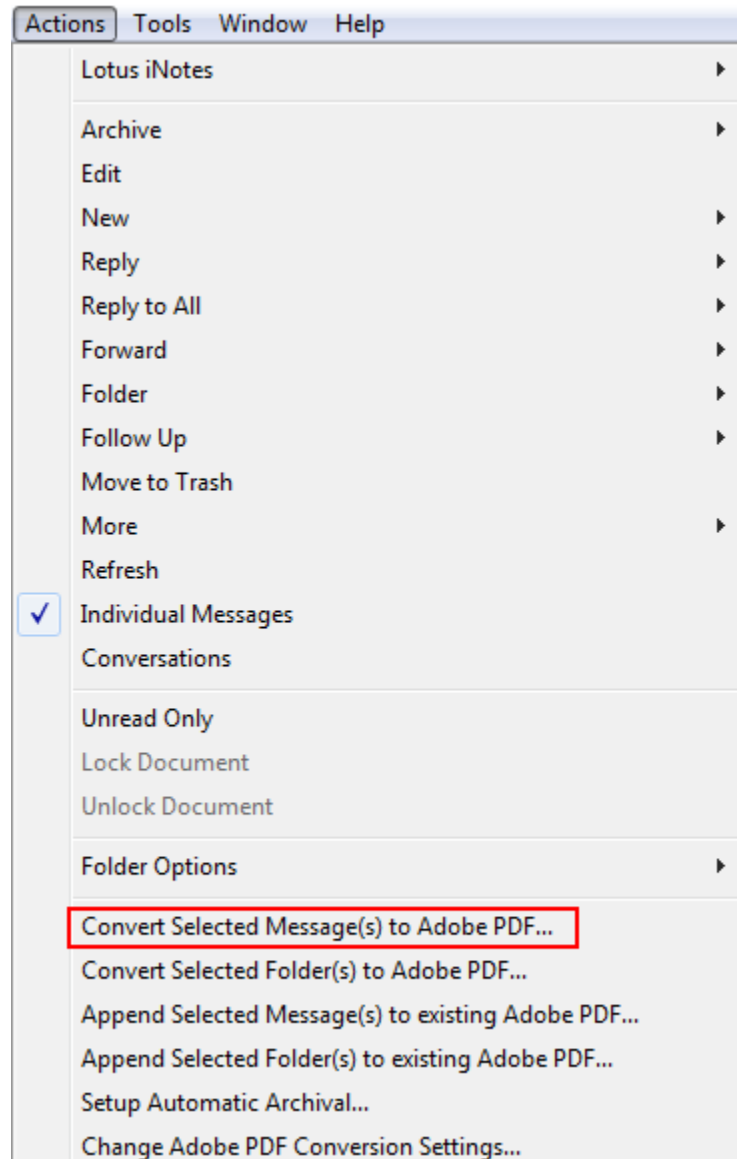| ☑ !	Who	▷ Subject	Date ▼	Size	○ ✎ ⚑
	⊟ Alicia Pinter	IPO - Publication / Ref. info	06/29/2010 10:08 AM	38K	→
	Susan Eastwood	final brochure	06/17/2010 12:53 PM	570K	✎ ✦
	Susan Eastwood	Re: revised brochure	05/07/2010 10:00 AM	24K	✦
	Carolyn Heald	Re: revised brochure	05/07/2010 09:59 AM	18K	
	Carolyn Heald	Orientation brochure	04/22/2010 10:18 AM	1.1M	✎ ✦

> **Tip**
>
> To quickly select multiple messages to convert, hold down the CTRL key while clicking on the individual emails.
>
> To select a group of consecutive email messages, hold down the SHIFT key while clicking on the first and last emails in the group.
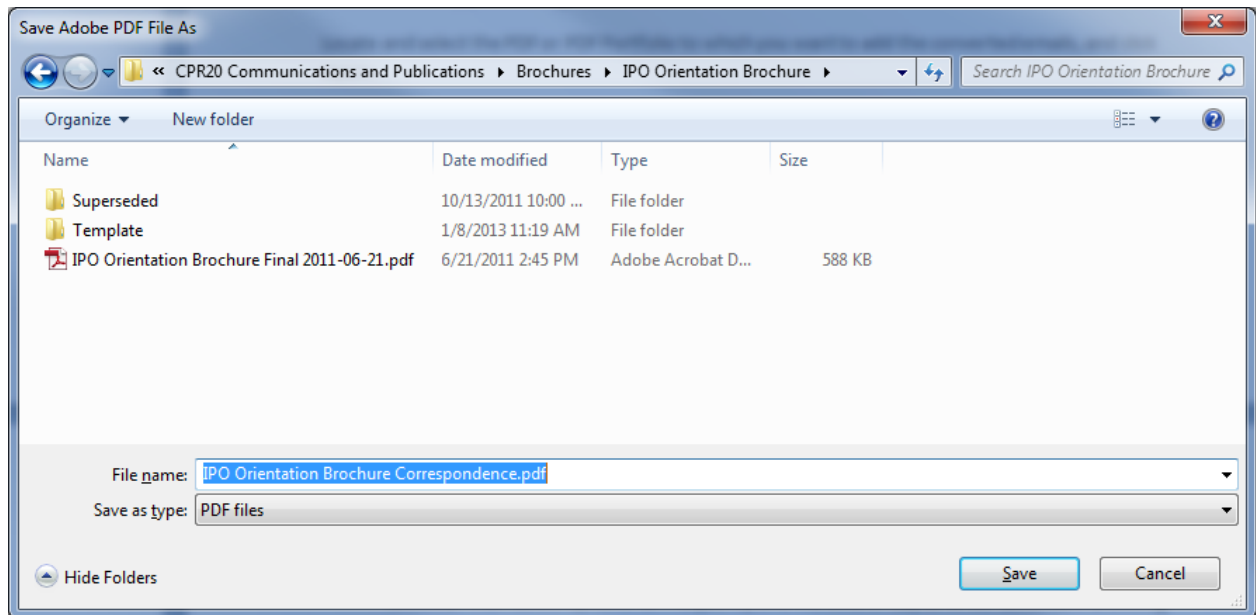
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HOW TO SAVE AND FILE LOTUS NOTES EMAILS

2. Next, choose **Actions > Convert Selected Message(s) to Adobe PDF**.

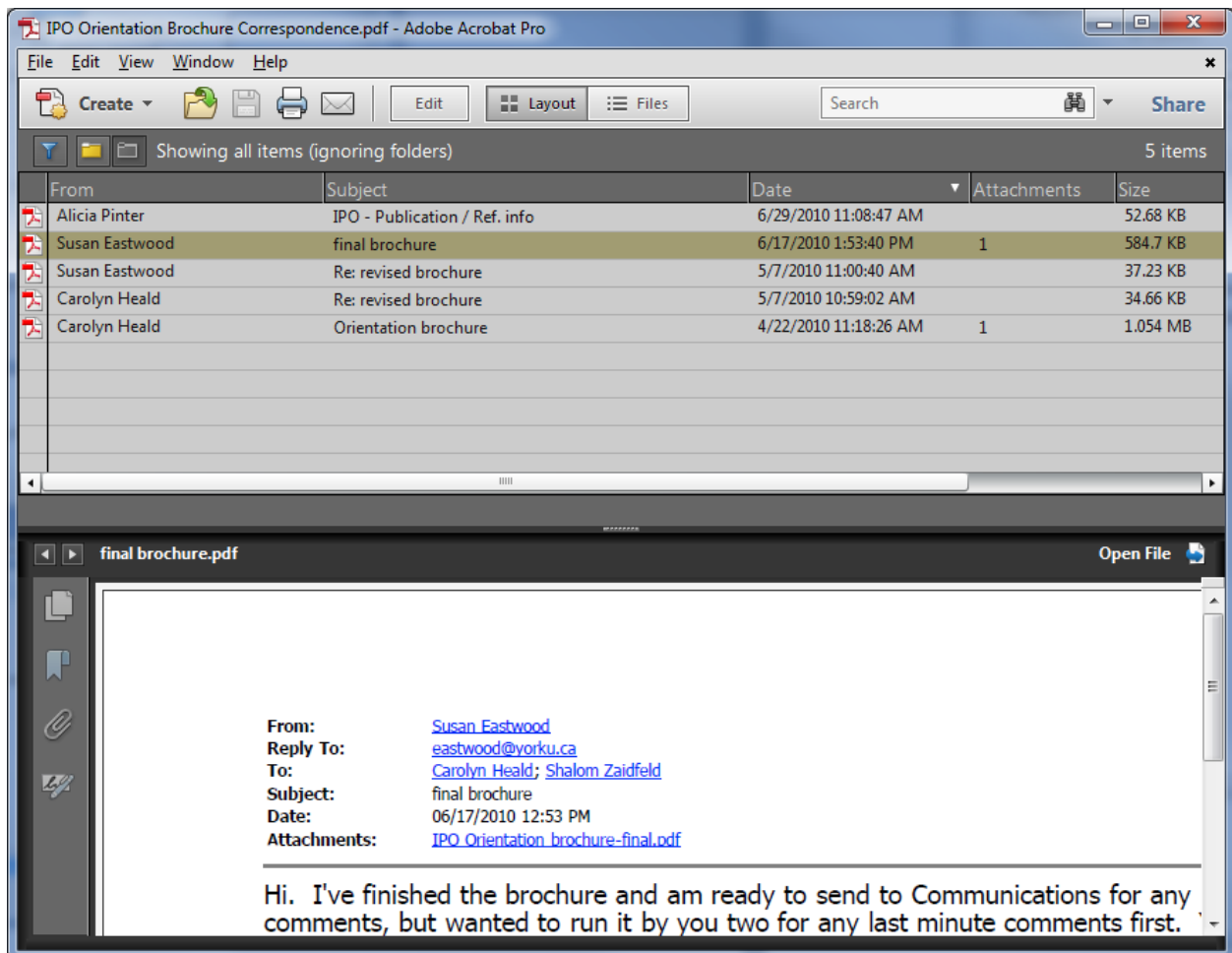| Actions	Tools Window Help	
	Lotus iNotes	▶
	Archive	▶
	Edit	
	New	▶
	Reply	▶
	Reply to All	▶
	Forward	▶
	Folder	▶
	Follow Up	▶
	Move to Trash	
	More	▶
	Refresh	
✓	Individual Messages	
	Conversations	
	Unread Only	
	Lock Document	
	Unlock Document	
	Folder Options	▶
	Convert Selected Message(s) to Adobe PDF...	
	Convert Selected Folder(s) to Adobe PDF...	
	Append Selected Message(s) to existing Adobe PDF...	
	Append Selected Folder(s) to existing Adobe PDF...	
	Setup Automatic Archival...	
	Change Adobe PDF Conversion Settings...	

HOW TO SAVE AND FILE LOTUS NOTES EMAILS

3. In the **Save Adobe PDF File As** dialog box, navigate to desired target shared drive folder and enter a file name for the archived email PDF. Then click **Save**.

> **Tip** Follow your unit's standard naming conventions to maintain consistency for easy file browsing and retrieval. See Tip Sheet #6 **Naming Conventions for Electronic Files and Folders**.

HOW TO SAVE AND FILE LOTUS NOTES EMAILS

4. The newly created PDF file will open and display a list of the archived emails and their applicable attachments:

⚠️ The selected email messages will remain in your Lotus Notes after the conversion and are **NOT** deleted automatically. Messages should be deleted from Lotus Notes to avoid having multiple copies.

# HOW TO SAVE AND FILE LOTUS NOTES EMAILS

Section B: How to Save and File an Email Folder

1. In Lotus Notes, choose **Actions > Convert Selected Folder(s) to Adobe PDF**.

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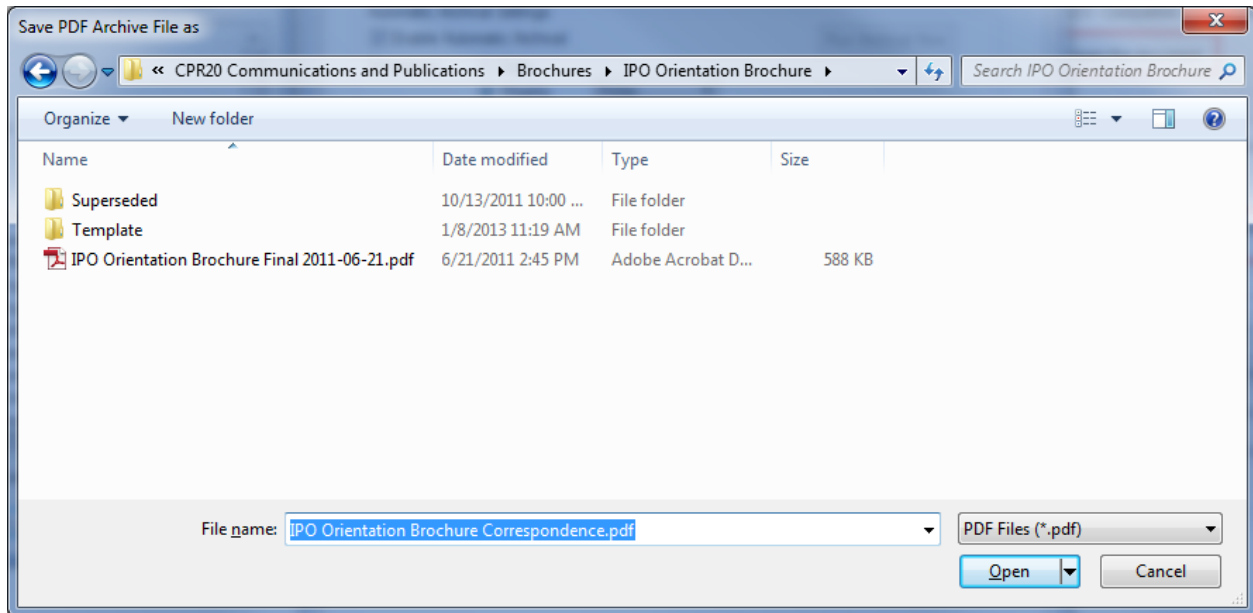UNIVERSITY
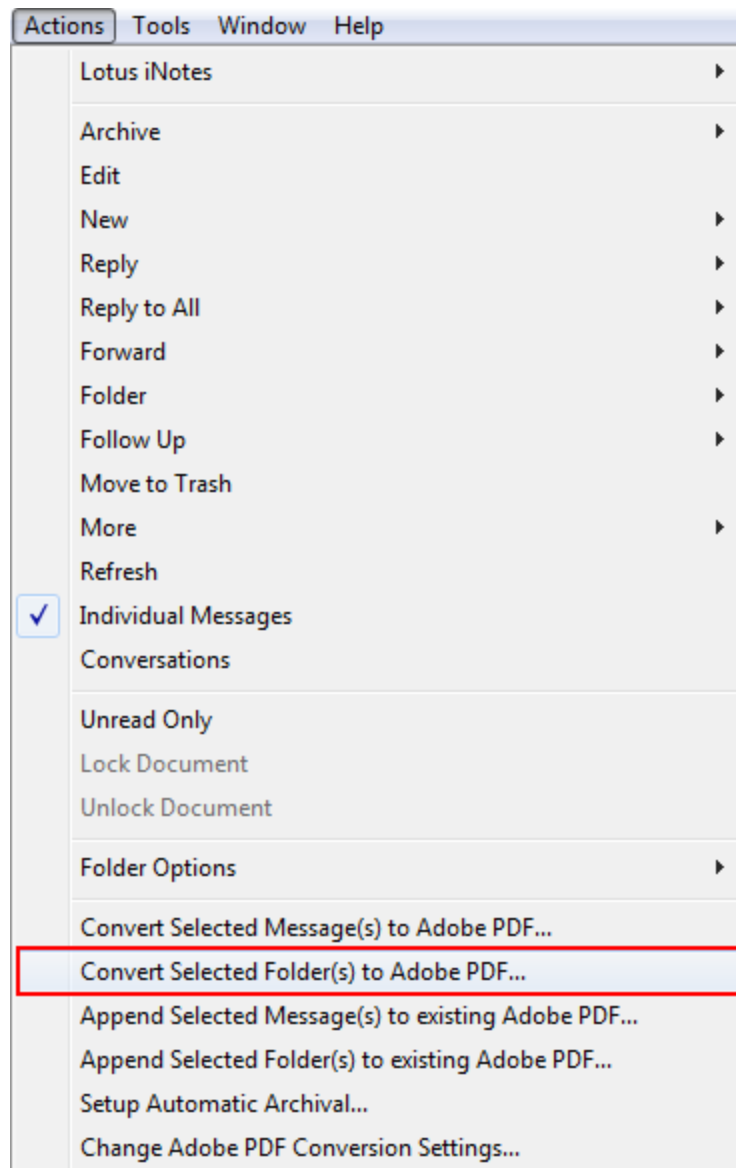
HOW TO SAVE AND FILE LOTUS NOTES EMAILS

2. In the **Convert folder(s) to PDF** dialog box, select the email folders and subfolders. Then select or deselect the **Convert this Folder and all sub folders** option, as preferred, and click **OK**.
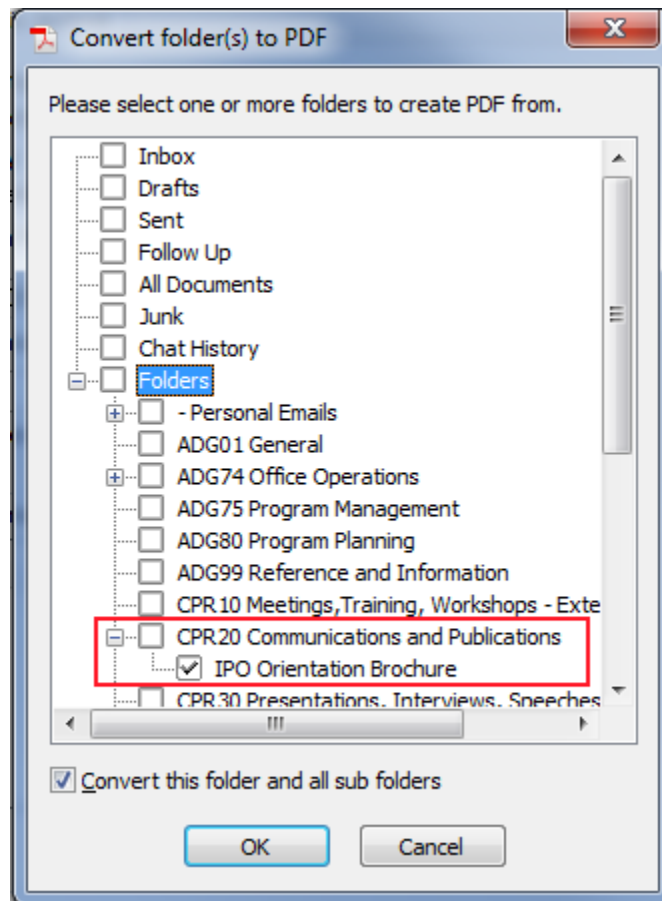
The Email folder filing feature should not be used to archive/save unrelated folders in a single PDF file. This feature should only be used to archive/save specified Inbox subfolders containing emails related specifically to your records classification plan, thereby preventing unwanted capture of transitory, personal or unrelated emails in these created PDF files.

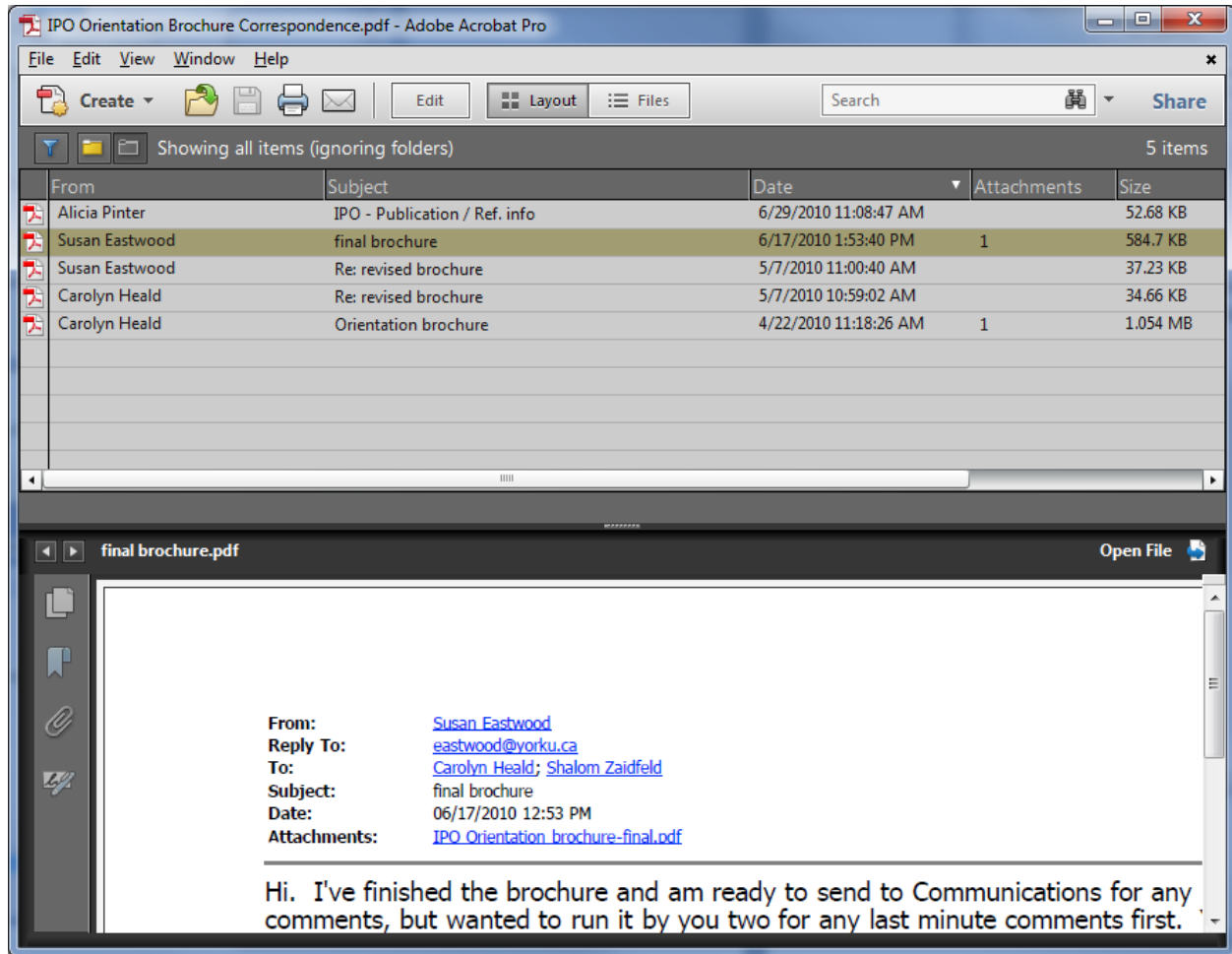# HOW TO SAVE AND FILE LOTUS NOTES EMAILS

3. In the **Save Adobe PDF File as** dialog box, navigate to desired target shared drive folder and enter a file name for the archived email PDF. Then click **Save**.

| Tip | Follow your unit's standard naming conventions to maintain consistency for easy file browsing and retrieval. See Tip Sheet #6 **Naming Conventions for Electronic Files and Folders**. |

HOW TO SAVE AND FILE LOTUS NOTES EMAILS

4. The newly created PDF file will open and display a list of the archived emails and their applicable attachments:
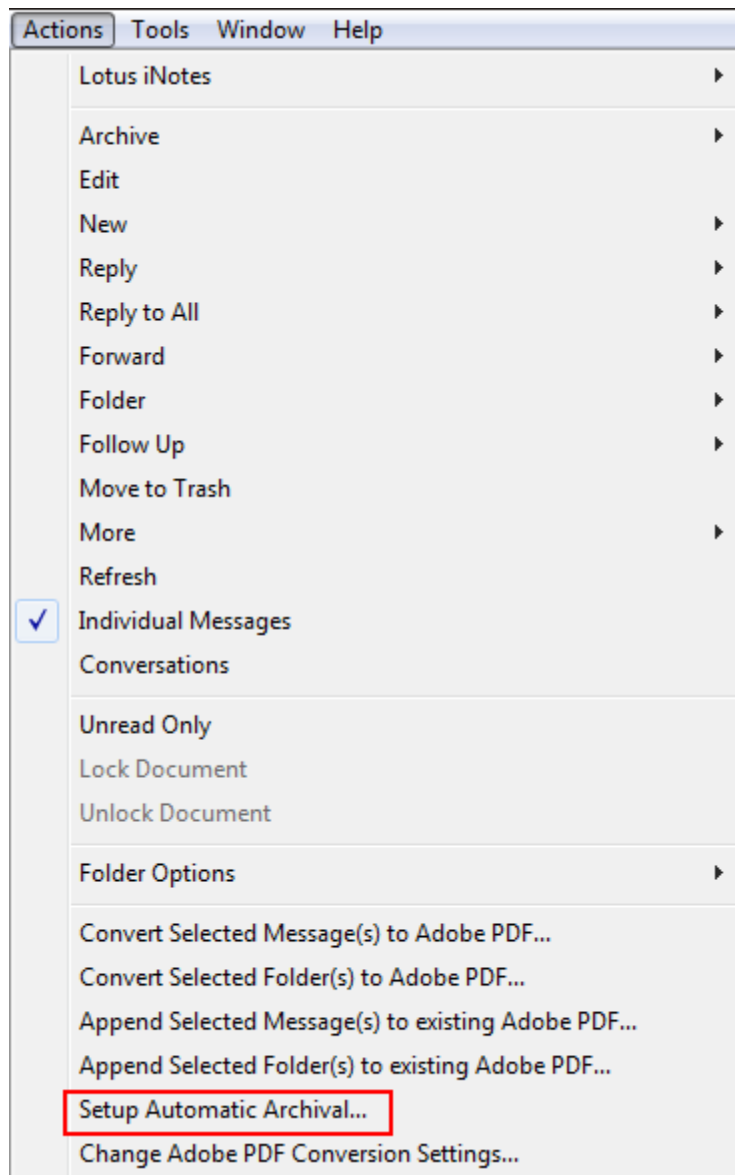

⚠️ The selected email messages will remain in your Lotus Notes after the conversion and are **NOT** deleted automatically. Messages should be deleted from Lotus Notes to avoid having multiple copies.

HOW TO SAVE AND FILE LOTUS NOTES EMAILS

Section C: How to Set Up Automatic Email Filing

1. In Lotus Notes, choose **Actions > Setup Automatic Archival**.

HOW TO SAVE AND FILE LOTUS NOTES EMAILS

2. On the Automatic Archival tab of the **Acrobat PDFMaker** dialog box, select **Enable Automatic Archival**. Then select the options for frequency and the time of day at which automatic archiving will occur. To continue, click **Add**.

Select other optional settings, according to your needs:

- *Maintain Log of Archival* - Creates a record of each archiving session.
- *Log File* - Specifies the name and location of the archiving log.
- *Embed index for faster search* - Creates an index that you can search to find specific words or characters instead of having to search each individual document.
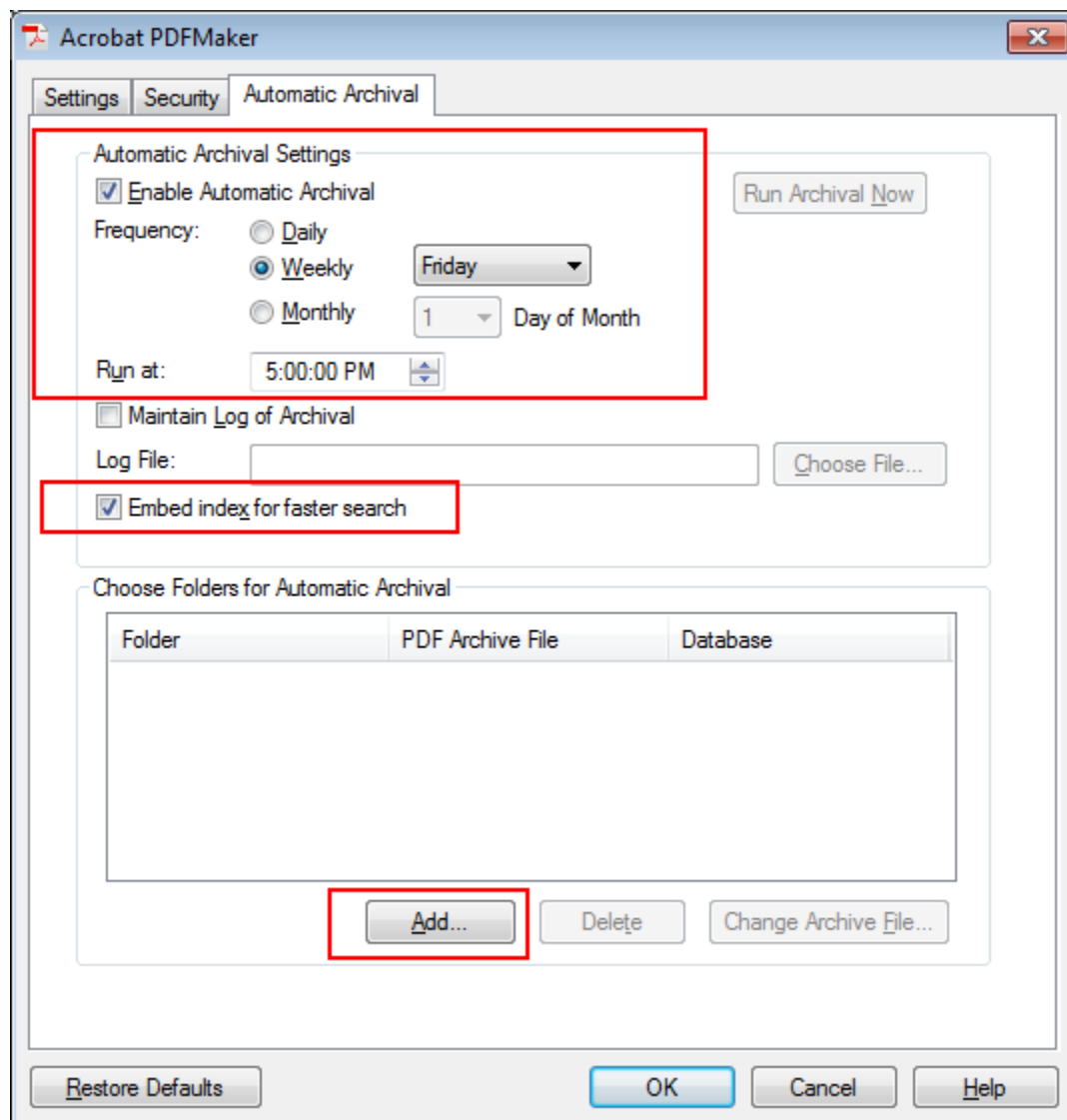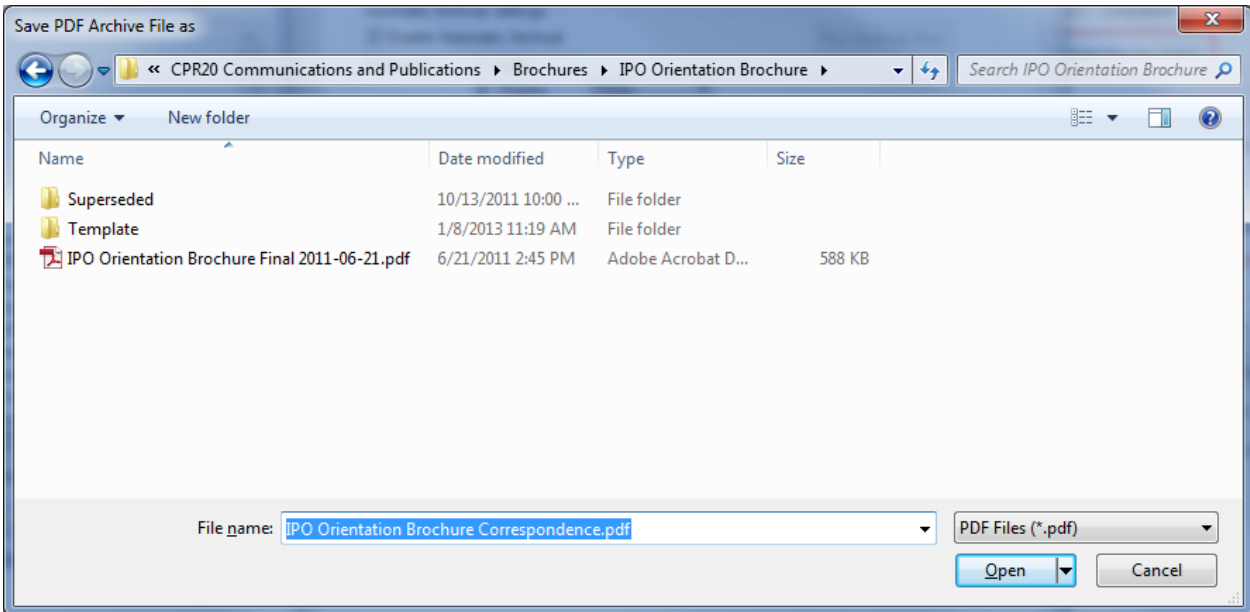
HOW TO SAVE AND FILE LOTUS NOTES EMAILS

3.   Next, select the email folders and subfolders. Then select or deselect the **Convert this folder and all sub folders** option, as preferred, and click **OK**.
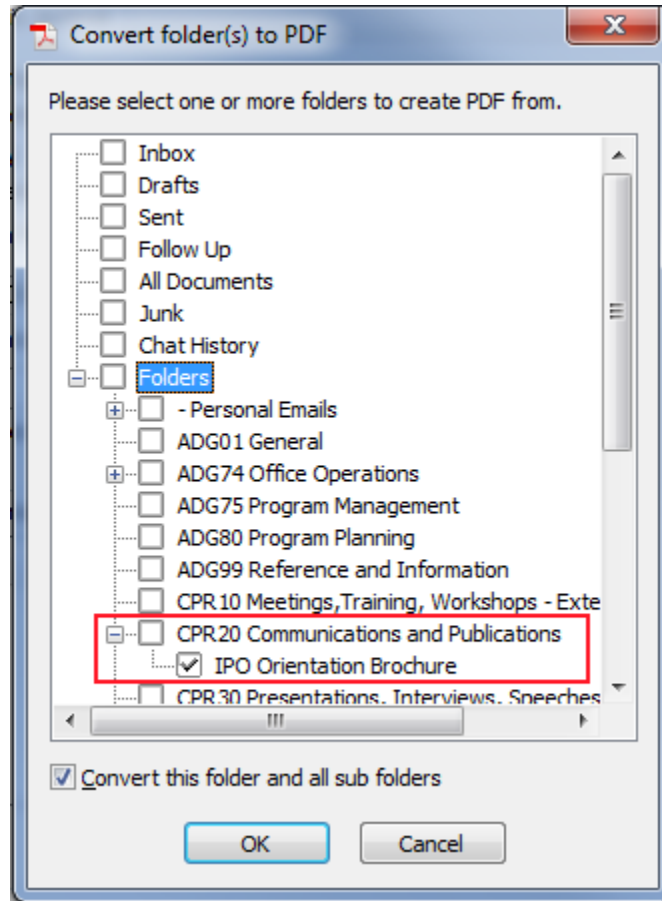
The Automatic archiving feature should never be used to archive/save all email in your Inbox. This tool should only be used to archive/save specified Inbox subfolders containing emails related specifically to your records classification plan, thereby preventing unwanted capture of transitory, personal or unrelated emails in these automatically created PDF files.

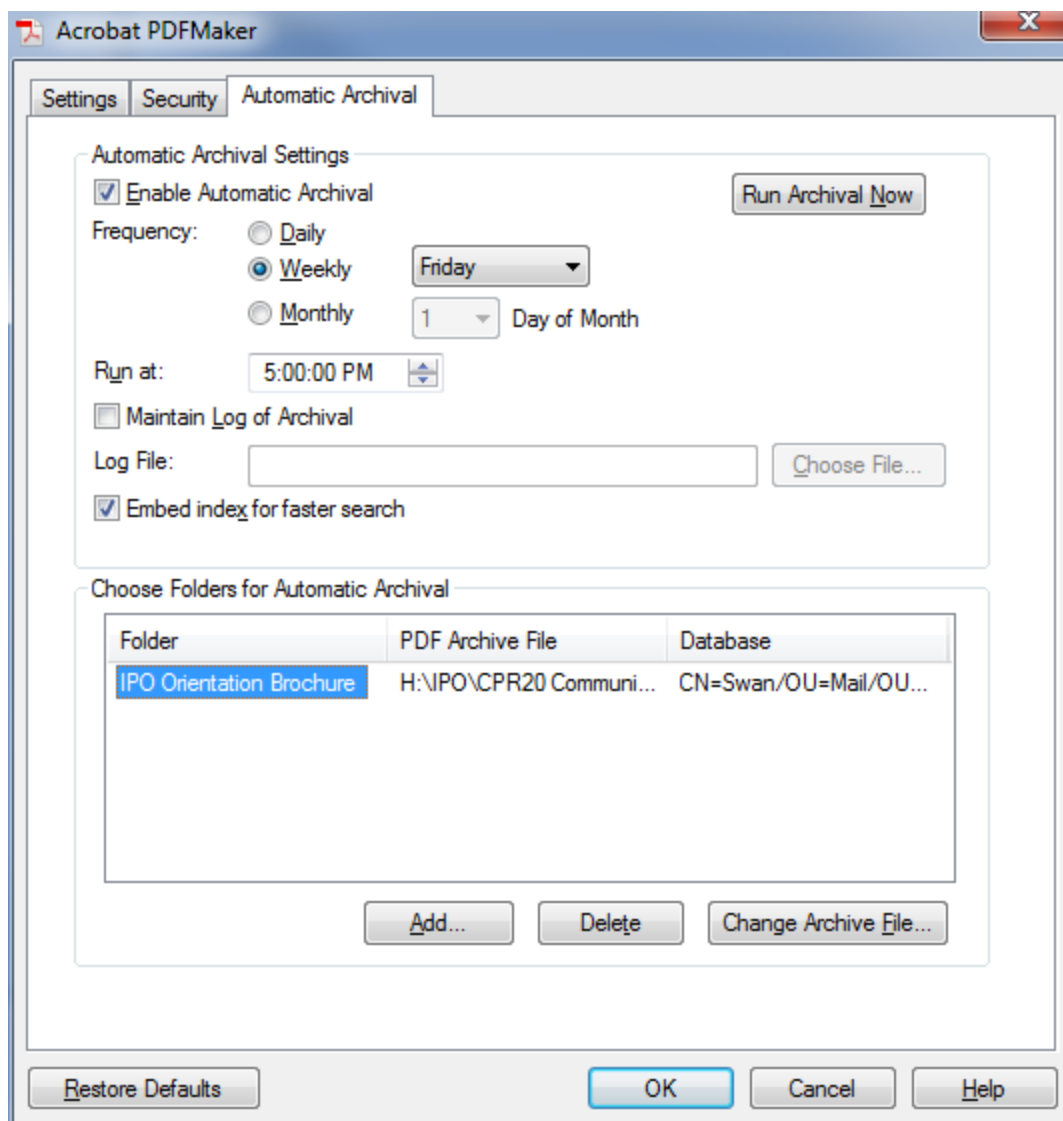# HOW TO SAVE AND FILE LOTUS NOTES EMAILS

4. In the **Save PDF Archive File as** dialog box, navigate to desired target shared drive folder and select a file name for the archived email PDF. Then click **Open**.

⚠️ The selected email messages will remain in your Lotus Notes after the conversion and are **NOT** deleted automatically. Messages should be deleted from Lotus Notes to avoid having multiple copies.

HOW TO SAVE AND FILE LOTUS NOTES EMAILS

5. Review the settings and the archive folder names listed in the **Acrobat PDFMaker** dialog box, and do any of the following:

- To add other email folders to the list, click **Add** and select the folder.
- To remove folders from the list, select the folders and click **Delete**.
- To change an archive file, select any folder name from the list, click **Change Archive File**, and specify the name and location.
- To start archiving email immediately, click **Run Archival Now**.

HOW TO SAVE AND FILE LOTUS NOTES EMAILS

6. The newly created PDF file will display a list of the archived emails and their attachments. New emails filed in this Lotus Notes email folder will be added automaticlly to this PDF file after the next scheduled archival run.
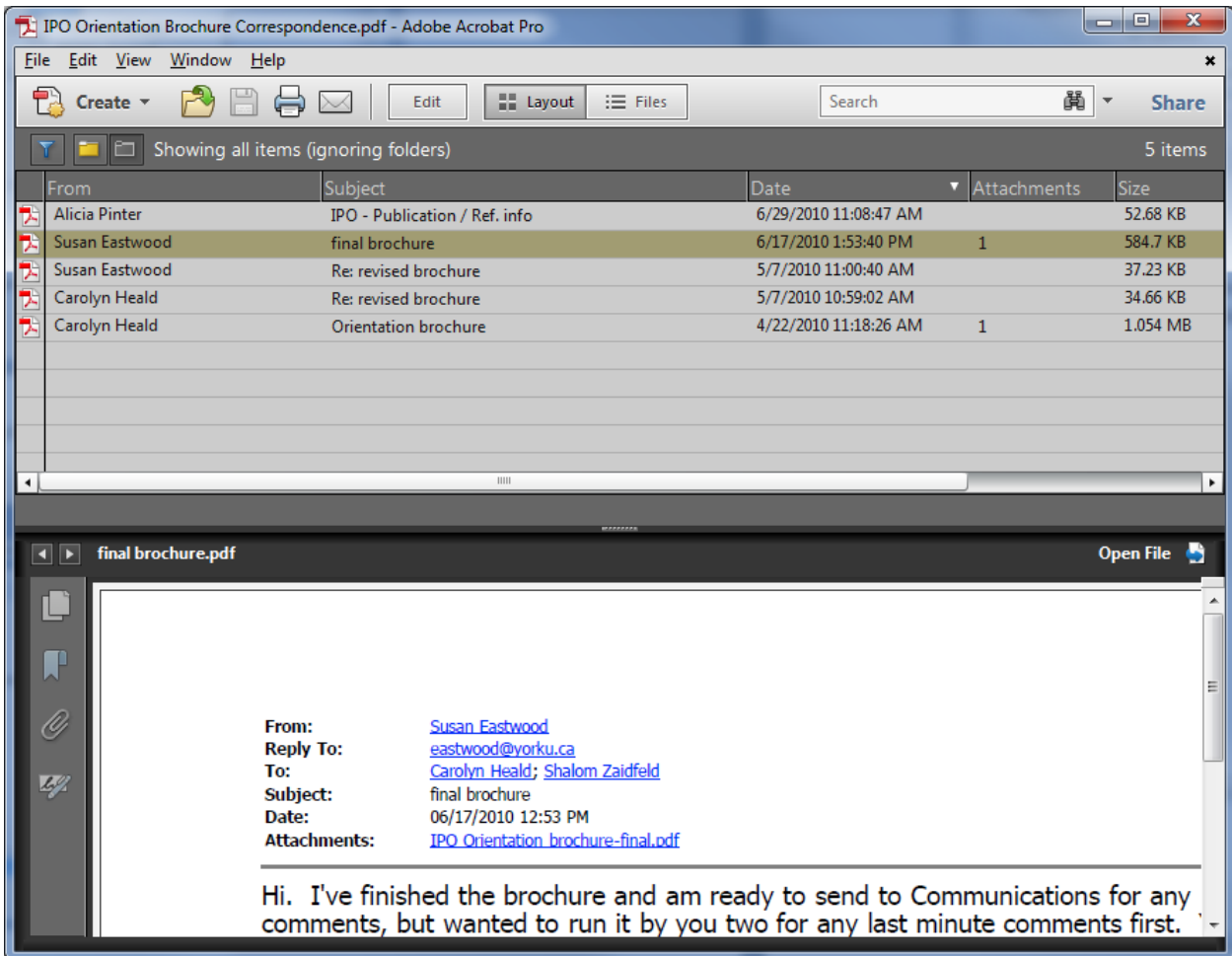
⚠ The email system is not a recordkeeping system. A recordkeeping system organizes records according to a file plan, provides shared access to those who need it, and applies retention and disposition rules. Adobe Acrobat Pro offers a solution to file and maintain email records with related records on a unit's shared drive.