



NARA CAPSTONE FOR EMAIL IN OFFICE 365

OVERVIEW

Got O365? Then you have what you need to meet NARA’s Capstone for executives email records. Don’t panic, it really isn’t that hard. O365 has the ability to define default archiving retention policies that move email to an archive mailbox. O365 also has the ability to perform eDiscovery on archive mailboxes for culling and sending email records to NARA on a periodic basis. All this can be done quickly and easily, without spending a lot of time, money or effort.

O365 CAPSTONE FOR EMAIL RECORDS

Millican can assist your organization with:

1. Identifying Capstone mailboxes in line with RM policy and compliance;
2. Setting up an archive mailbox for each Capstone mailbox;
3. Creating default retention policies to move email to the archive mailbox after a specified period of time (Note: You can leverage the Clutter machine learning feature to filter junk mail prior to having it archived)
4. Optionally adding a preservation policy to prevent changes to email records;
5. Leveraging the built in Compliance Center to discover, cull and transfer email to NARA periodically.

The screenshot shows the Office 365 Admin Center interface. The top navigation bar includes 'Office 365' and 'Admin' tabs, along with notification, settings, help, and user profile icons. The main content area is titled 'Compliance Center' and features a left-hand navigation menu with options: Home, Archiving, eDiscovery, Retention (highlighted), Import, and Permissions. The 'Retention' section is active, displaying a 'Retention' header and a description: 'Retention helps you take control of the content in your organization by providing policies that let you decide what content to delete. [Learn more](#)'. Below this, there are sections for 'Delete' and 'Preserve'. The 'Delete' section includes links for 'Manage retention tags for mailboxes', 'Manage retention policies for mailboxes', 'Assign retention policies to mailboxes', and 'Manage document deletion policies for SharePoint Online and OneDrive for Business'. The 'Preserve' section includes a description: 'Preservation policies help keep the content you need by preserving email and documents if they're changed or deleted.' At the bottom, there is a table with columns for 'Name', 'Last modified', and 'Status'. The table is currently empty, with a message below it stating 'There are no items to show in this view.'

MAXIMIZE YOUR INVESTMENT IN MICROSOFT TECHNOLOGY

- Millican can help your agency stand up a Capstone solution in Office 365 quickly, easily and without much cost.
- Get compliant with the Presidential Records Management Directive for 2016.
- Avoid investing in expensive and redundant technology.
- Additionally, leverage third party O365 and SharePoint apps, such as GimmalSoft, for all your e-records needs.
- Contact Millican today to learn more.

