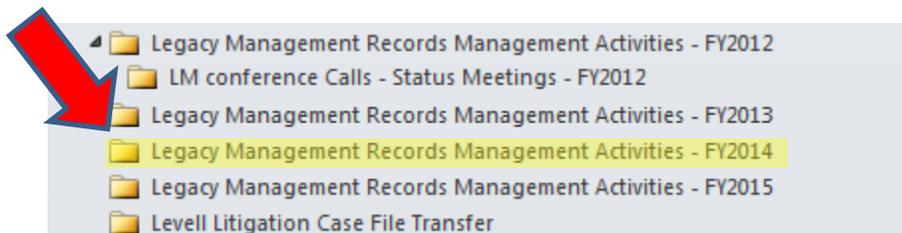


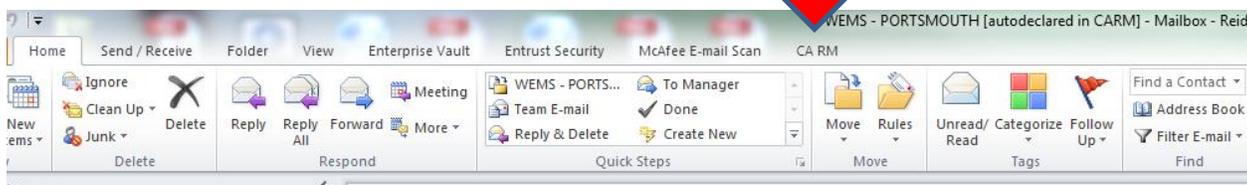
## AUTO DECLARATION PROCESS

To auto declare an outlook folder to CARM (record content):

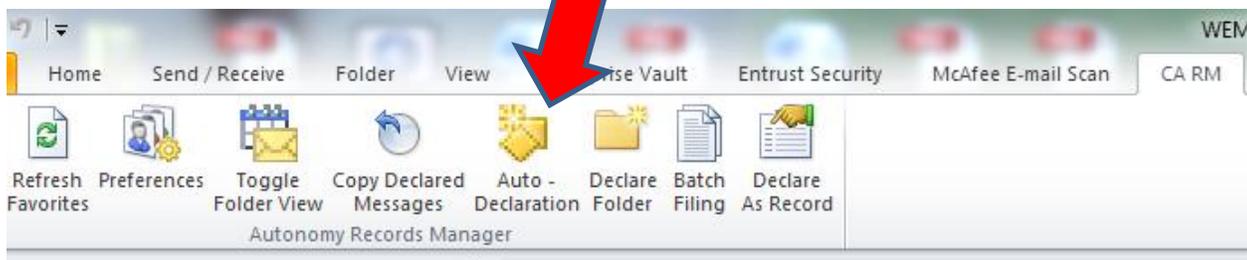
### 1. Select (highlight) Outlook folder to be auto declared.



### 2. Select **CA RM** on your Outlook toolbar.

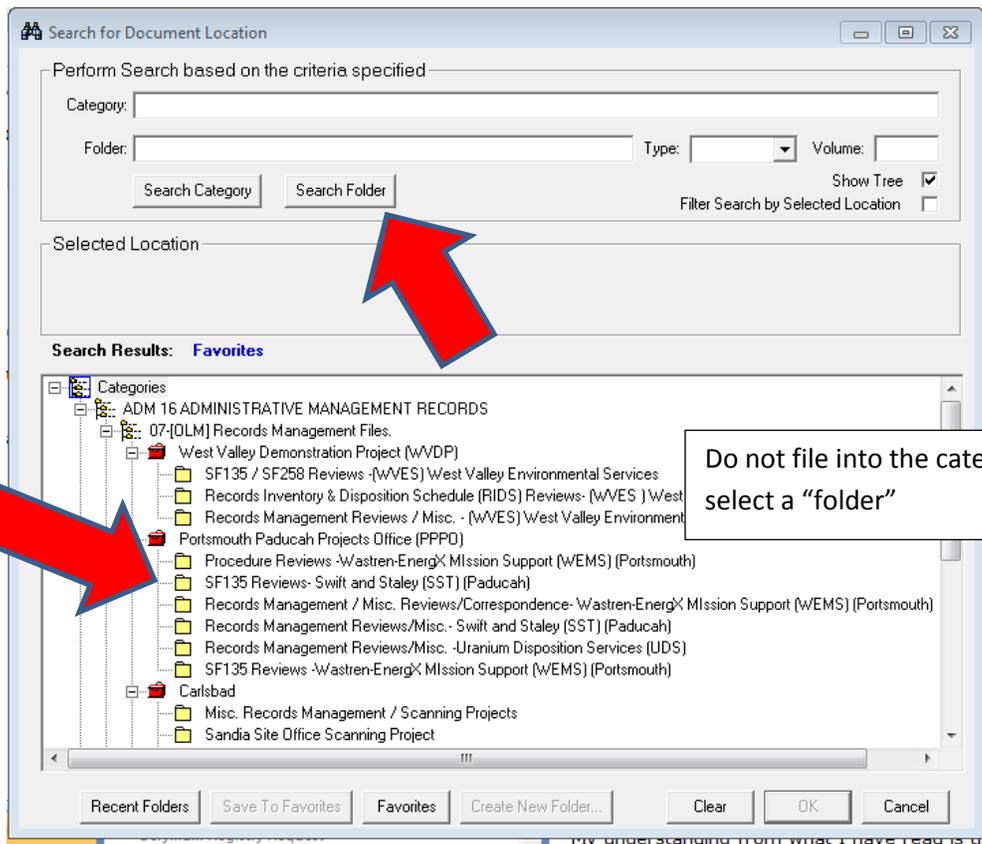


### 3. Select **"Auto Declaration"** from the menu.



### 4. The following menu will "pop" up, select **"search folder"**

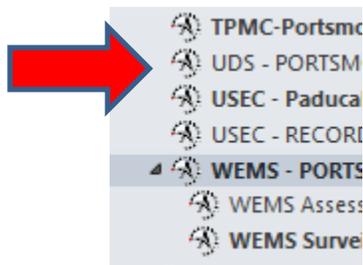
**NOTE:** Folders are the bottom tier items that have a yellow folder in front of the title.



5. Select the CARM folder that correlates to your Outlook Folder. Click once on the folder and then click “ok”

6. If you do not see folders, click on the + sign at the Category and/or redweld to see all folders within that category or under a redweld.

7. The system visually changes the Outlook folder icon to show an Outlook folder has been auto-declared.



**8. The Outlook folder is now auto declared; any email currently in the folder will automatically go into the system after the ERMS runs this service, as well as all e-mails that are placed into the folder from that point forward.**

**NOTES:**

- Ensure ALL encrypted emails are decrypted prior to moving into Outlook folders (see below for instructions on decrypting an e-mail(s))
- Archived e-mails should be restored prior to moving into Outlook folders (see below for instructions on restoring an e-mail or e-mails from vault).

**Reminder**, if you select an Outlook folder and it comes up in what is called the CARM view (see below); you can switch back to the standard Outlook view by:

- Selecting “**CA RM**” from the outlook toolbar and then
- Selecting “**toggle folder view**”
- NOTE: every once in a while you may need to select it a couple of times to get it to switch. The system remembers the last view you were in.

**ERMS VIEW (also known as CARM View):**

Documents					
ADM 23-01-A-[OLM]-0-FLDR-008 Records Management Weekly Reports (Reid & Schoultheis)					
Type	Number	To	From	Subject	Date
	ADM 23-01-A-[OLM]-FLDR-8-360761v1	Sattler, John; Marcus, Tim	Reid, Kathy	Weekly Report we 03012013	3/4/2013 7:11:46 AM
	ADM 23-01-A-[OLM]-FLDR-8-357768v1	Reid, Kathy	Campbell, Greg	Re:	2/25/2013 6:41:49 AM
	ADM 23-01-A-[OLM]-FLDR-8-357690v1	Schoultheis, Jackie	Reid, Kathy	Weekly Report we 02222013	2/22/2013 10:04:05 AM
	ADM 23-01-A-[OLM]-FLDR-8-357163v1	Sattler, John; Marcus, Tim	Schoultheis, Jackie	Weekly Report we 02152013	2/15/2013 7:50:16 AM
	ADM 23-01-A-[OLM]-FLDR-8-357056v1	Schoultheis, Jackie	Reid, Kathy	Weekly Report we 02152013	2/15/2013 6:42:21 AM
	ADM 23-01-A-[OLM]-FLDR-8-356003v1	Sattler, John; Marcus, Tim	Reid, Kathy	weekly	2/1/2013 9:17:49 AM

**Other Reminders:**

- If you misfile an e-mail message to the wrong outlook folder that has been auto declared, you typically will have a few minutes (~10 minutes) to move the message to the correct folder before it is auto declared to the ERMS. If you realize it after it has been auto declared, please contact the RMFO so that it can be moved.
- Remember to remove passwords (from attachments) and decrypt encrypted messages PRIOR to auto declaring the auto-declared folder or before moving into an outlook folder that has been auto declared.

- If a folder contains OUO, please contact the RMFO so folder can be properly marked and language can be placed in the ERMS folder notes to help ensure information within the folder is not released without proper review/approval.
  - This folder may contain OUO material both in the email and/or attachments. The original email may not contain the wording that it or the attachment contains OUO if it was sent via Entrust. Use caution prior to disclosing any information contained within this folder.