

Exporting Outlook Calendars for TDA Transfer

A visual guide

About the Calendar record series

Please note: The comments of this section discuss the retention schedule for calendars generally and may not be 100% accurate to the case in your agency. It references the general State Retention Schedule, see your agency retention schedule for specifics or variations on what Calendars are needed.

What is meant by a Calendar¹

Calendars, appointment books or programs and scheduling, or itinerary records maintained by staff during business hours that document appointments, itineraries, and other activities of agency officials or employees. Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads are required. Transfer is one year *after* the end of a calendar year (i.e. a 2018 calendar would be eligible for transfer January 1, 2020).

Why is it sent to the State Archives²

The state archives exist, in part, to document the functioning of state government. Calendars of high-level agency staff can provide the public with insight into the functioning of the agency and when critical decisions were made or meetings were held. Calendar items involving low-level agency staff typically will also involve high-level staff, so lower-level staff calendars are redundant. The calendars series is marked for archival review as not all calendar items may be archival. The determination of archival status for calendar items is made by the state archives staff.

About the TDA and the archival process

The Texas Digital Archive (TDA) is the official repository for records of Texas State government. Its main function is to preserve records of state government in perpetuity. Upon receipt and official acceptance of the records as archival (records being accessioned), care and custody of transferred records becomes the responsibility of the State Archives. By transferring records to State Archives you may be saving your agency IT staff some headaches, as well as saving yourself time and effort down the road. For example, as with your agency, many of the records in the TDA have exceptions to open public access under the Public Information Act (PIA). While in the custody of your agency, when a member of the public requests access to records, one or more of your agency staff must review the records to determine what, if any, access is possible. Once the records have been accessioned by the state archives, responding to these types of PIA requests becomes the responsibility of the State Archives.

If the transferred records meet the necessary criteria for transfer, an archivist will review the records as a set to determine what is considered Archival with long-term or historic value. This process is called

¹ <https://www.tsl.texas.gov/slr/rrs#sec1.1>

² Ibid.

appraisal and is where the A (for definitely archival) or R (may be archival and needs to be reviewed) code from your retention schedule come into play. Appraisal may happen either before or after records are accessioned, depending on the circumstances for the transfer. For those records deemed archival, a description will be made about the set of records from your agency and provided online for researchers. At that time, whatever records are allowed general public access under the PIA will become available in the TDA public access portal. Records that fall within exceptions to the PIA, or whose status under the PIA cannot be immediately determined, are restricted and upon request will be reviewed for redaction and/or public access.

What we are looking for

The short answer

The State Archives prefers transfer of electronic calendars managed by Microsoft Outlook in the PST file format.

The long answer/why

Digital preservation, put simply, is the ongoing attempt to ensure that the contents of digital file formats remain accessible long-term. When it applies to a file type, this effort usually involves converting a specific file type to a more stable format within the broader type of file format. For example, Microsoft Word 6 files are a “document” type which is converted to the “document” type PDF because it has known long-term stability and cannot be easily changed by users. The TDA uses a very complex digital preservation system to ensure these kinds of conversions take place.

In the case of email and electronic calendar files (as managed by MS Outlook), the most stable format as of this writing is .eml and .ics, respectively. Microsoft Outlook does not allow for direct export of .eml and .ics files individually or en-masse, instead it allows for bulk export of emails and calendar items using the PST Outlook archive file format or as a spreadsheet. The PST file can be thought of like a ZIP file: it is a container with many individual items in it. The TDA preservation system can unpack the PST file and ensure individual items are in the correct .eml and .ics formats. It will also keep the PST original, just in case. The spreadsheet format is also acceptable but is not preferred because it does not retain the inherent characteristics that make a calendar item unique.

How to export Outlook Calendar files

If you do not need visual directions on how to perform this process, skip to the end for [text-only instructions](#).

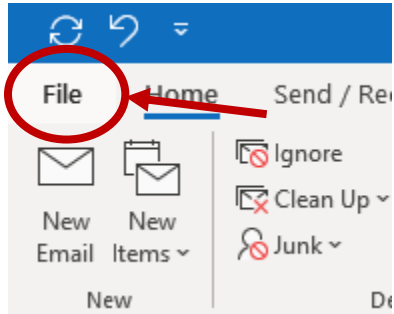
Get everything together in one place

Not everything you want to send may be in one place. If an account has been established for a long time, part of an Outlook calendar may be in the local archive file. Archive files store Outlook items over a certain age on the local computer to save server space. To the average user the experience is seamless, but for this transfer process it is important that a calendar all be either in the archive file or on the Outlook server. Given that a Calendar to be transferred is usually at least a year old, it is simpler to ensure that everything is in the archive file. Note that this is the same file format as you will be transferring to the TDA.

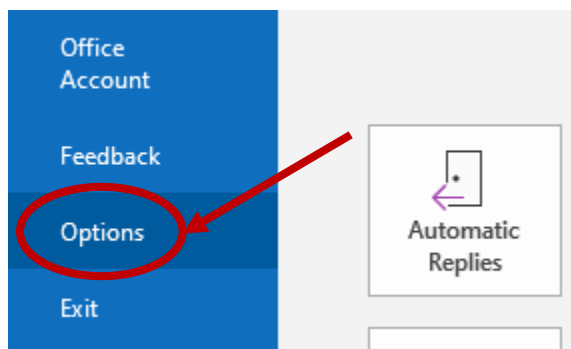
Check the AutoArchive settings

Complete this process to make sure the archive covers at least the most recent calendar period you want to transfer. For example, if you are transferring an executive calendar for last fiscal year and that ended 1 year ago, it would be best to have the AutoArchive set to at 6 months or older (the standard setting). Note that changing the AutoArchive to be long (i.e. from 3 months to 6 months) has no benefit for this process.

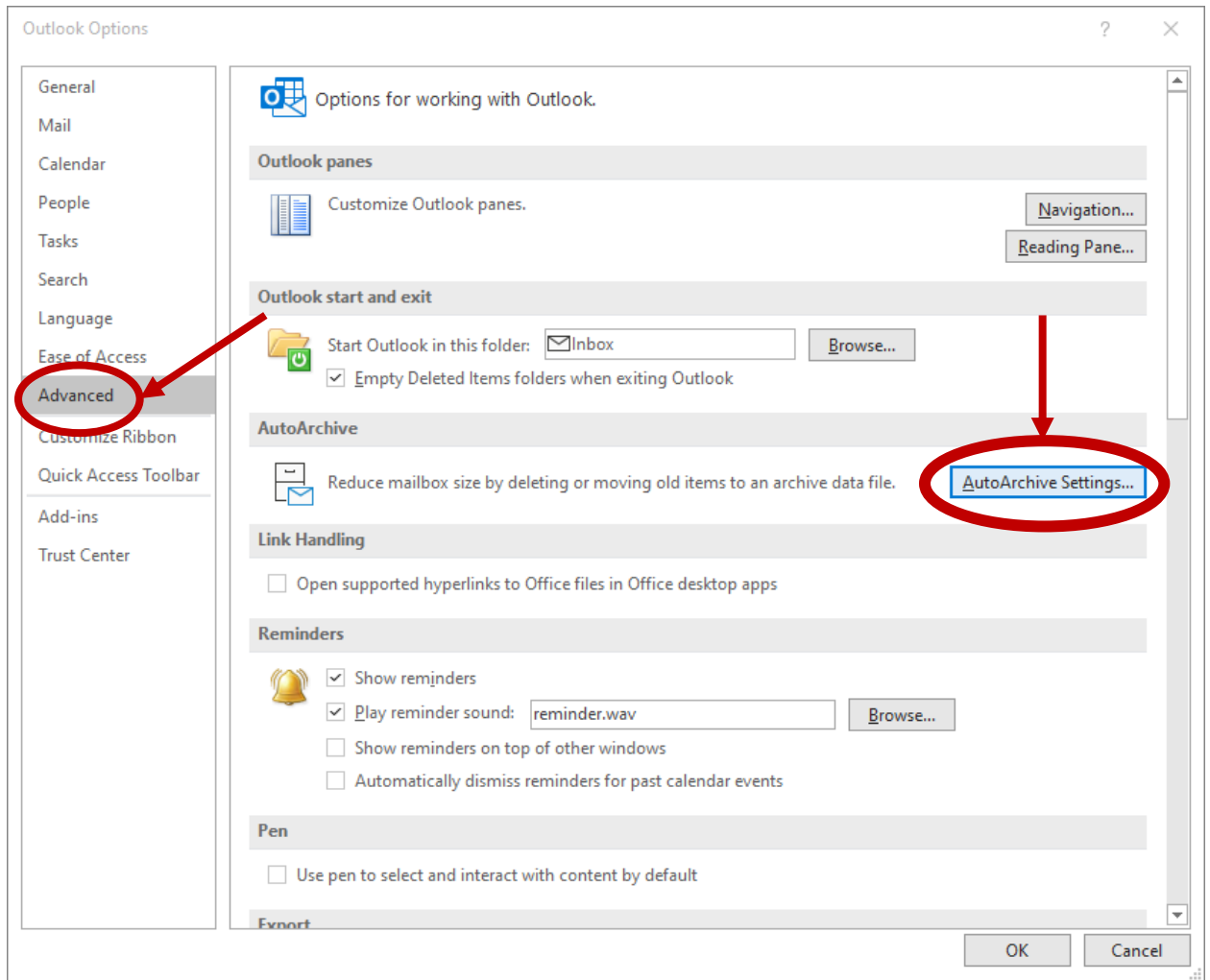
1. Go to the **File** tab.



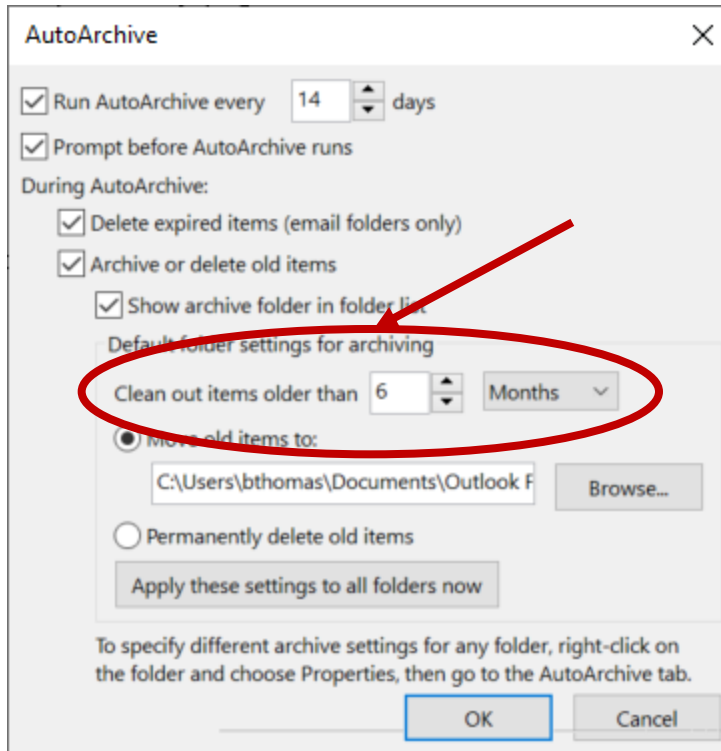
2. Choose **Options** from the left-hand sidebar.



3. In the resulting window, go to **Advanced** and click on **AutoArchive Settings...**



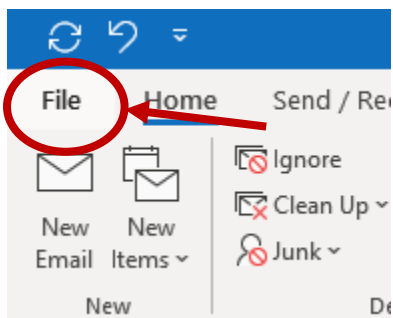
4. In the AutoArchive pop-up window, check the **Clean out items than** box and make sure the number of Months/Weeks/Days is sufficient to capture all of the Calendar. In the example below, it is set to 6 months.



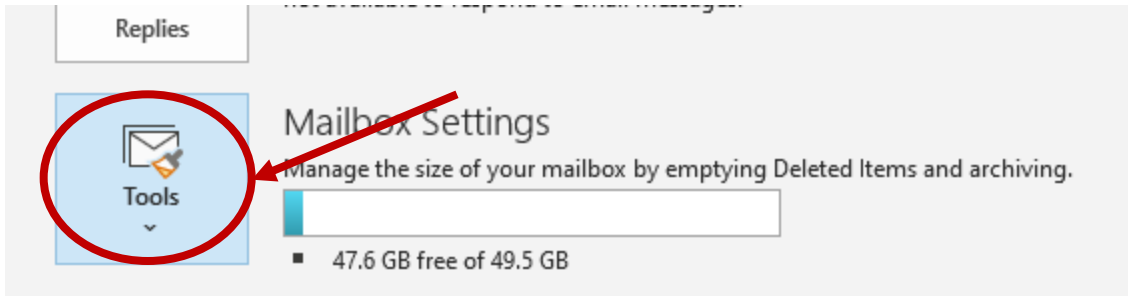
Run AutoArchive

After updating settings, you will need to run the AutoArchive function in Outlook to make sure the changes take effect. Users can delay AutoArchiving and there is no guarantee the user in question has not done so.

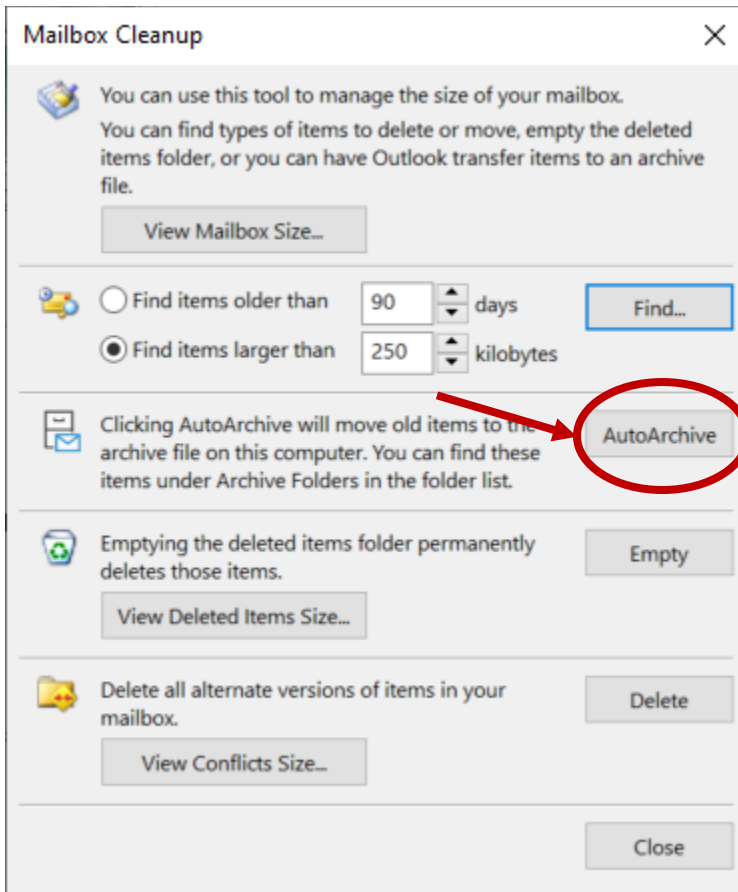
1. Go to the **File** tab.



2. Choose **Tools/Mailbox Settings** from the selection below the **Account Information**.



3. Click on the AutoArchive button.



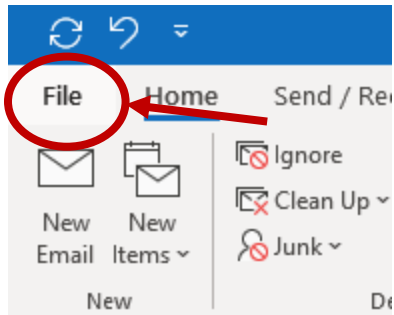
If the AutoArchive hasn't run in a while, or if you updated some settings, you will probably see a status bar on the bottom of the main screen, like so:



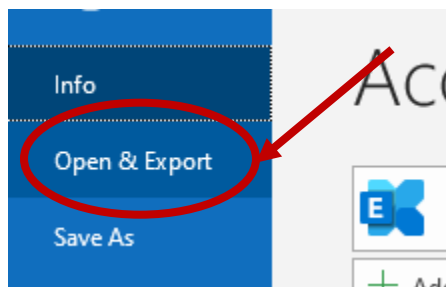
The export function and its refinements

Now that everything is confirmed to be in one place, it is time to create a Calendar archive file.

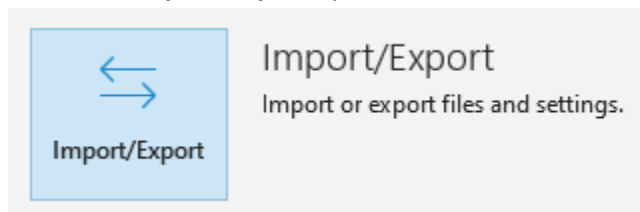
1. Go to the **File** tab.



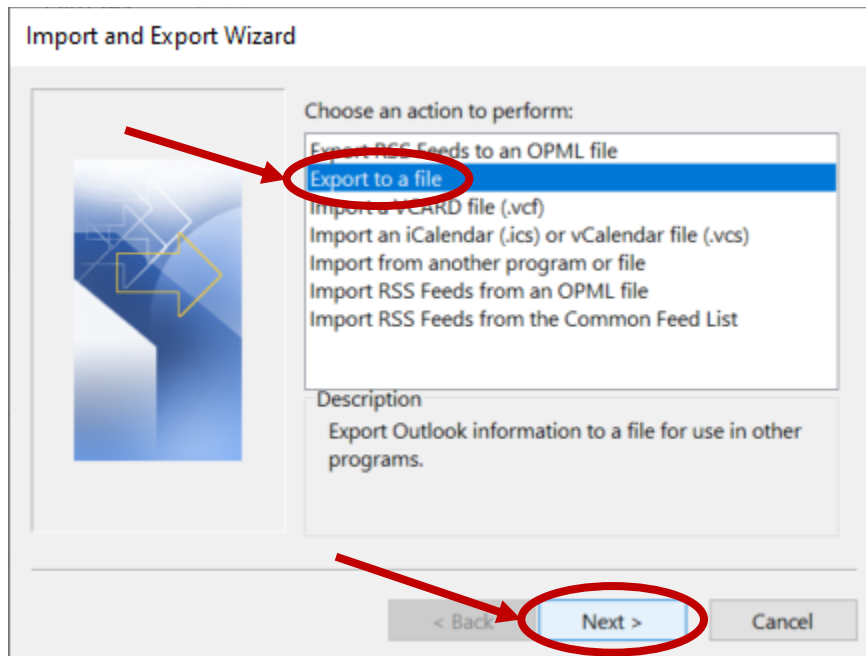
2. Select the **Open & Export** option from the left-hand sidebar.



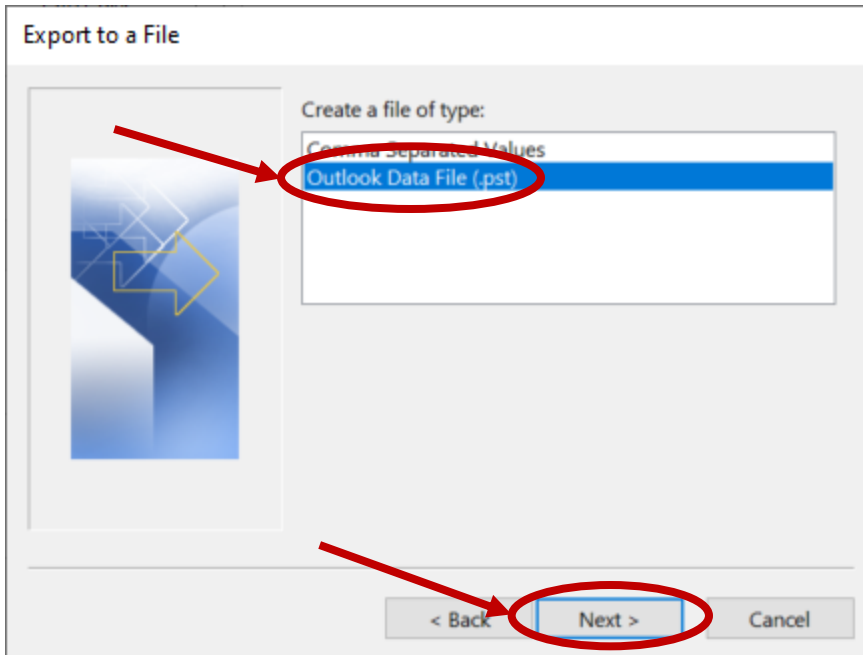
3. Select the **Import/Export** option.



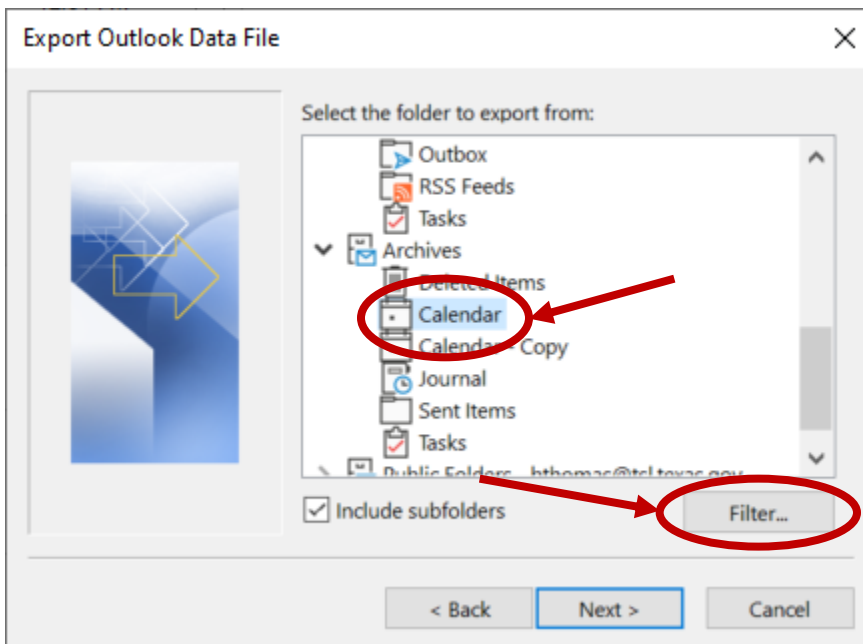
4. In the pop-up Import and Export Wizard window select **Export to a file** and click on **Next >**.



5. Next Choose **Outlook Data File (.pst)** and click **Next >**.

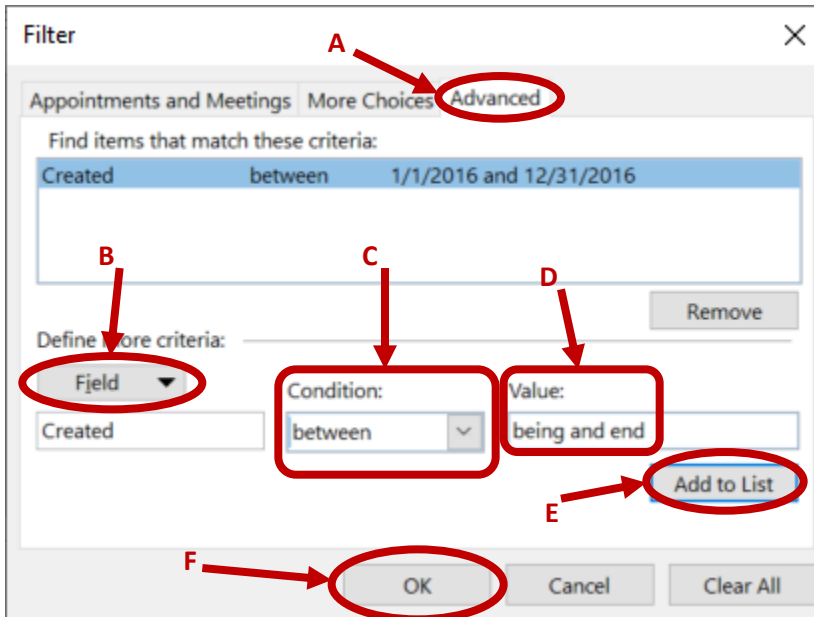


6. Now select what you want to archive. Scroll to the bottom of the **Select the folder to export from:** pane, expand **Archives** (if it isn't already) by clicking on the arrow to its left, and click on **Calendar**. Click on **Filter...**

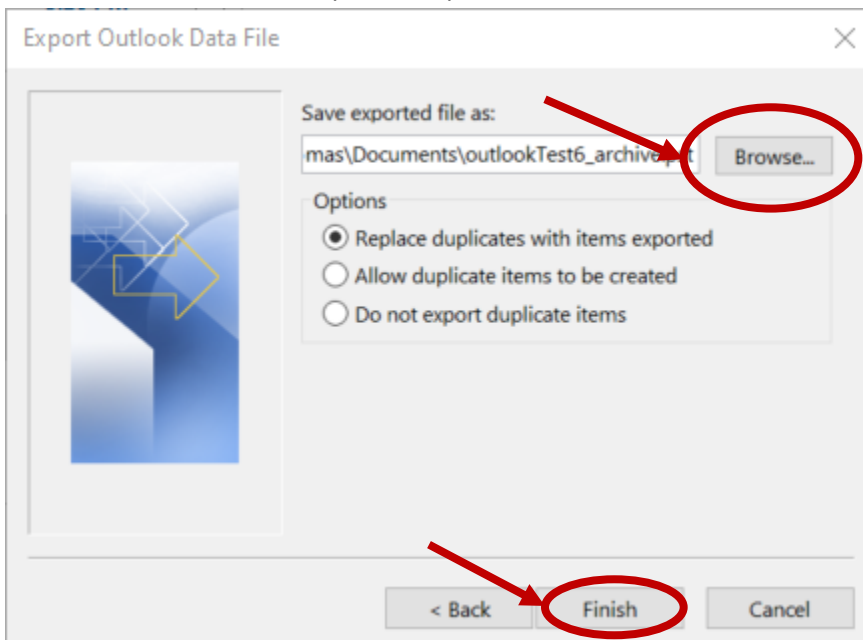


7. In the Filter screen:
 - a. Go to the **Advanced** tab.
 - b. Click on the **Field** drop-down menu and select **Created**.
 - c. In the **Condition** next to created select **between**, it is towards the bottom of the condition options.

- d. In **Value** enter the first beginning and ending dates using the word “and” as a separator. Like show below. Dates are in the m/d/yyyy format (no leading 0 if a number is less than 10).
- e. Click on **Add to List**.
- f. Then click on **OK**.



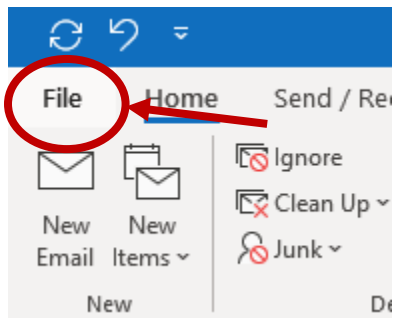
8. You should return to the previous window. Click on **Next >**.
9. In this last screen choose the name of the archive file you wish to create. Click on **Browse** to choose a save location and file name. To be safe it should not be named archive or outlook because those are common names assigned to the normal archive file and if you use the same name and happen to be in the same folder you may over-write the original. Leave the **Options** as-is. Click on **Finish** to complete the process.



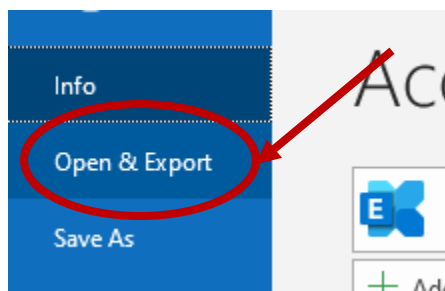
Exporting a spreadsheet sidekick

Exporting a sidekick spreadsheet is optional and is only to help the archives in its review of your transfer. It would be ideal, but is not required.

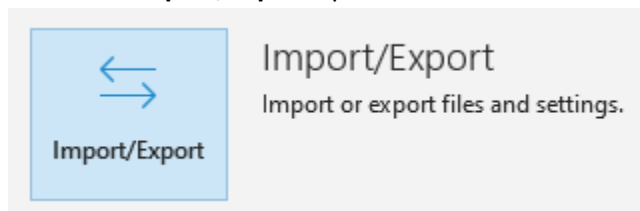
1. Go to the **File** tab



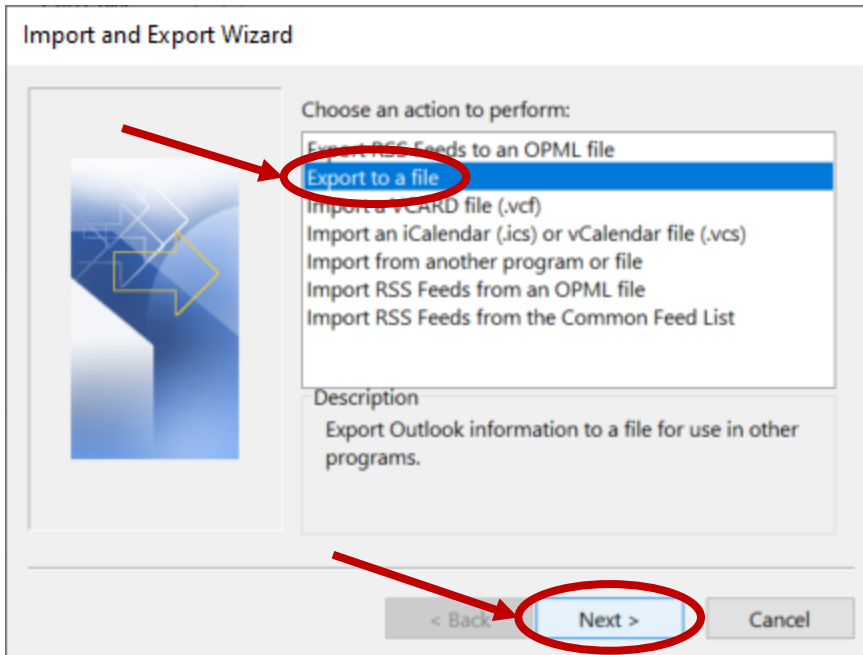
2. Select the **Open & Export** option from the left-hand sidebar.



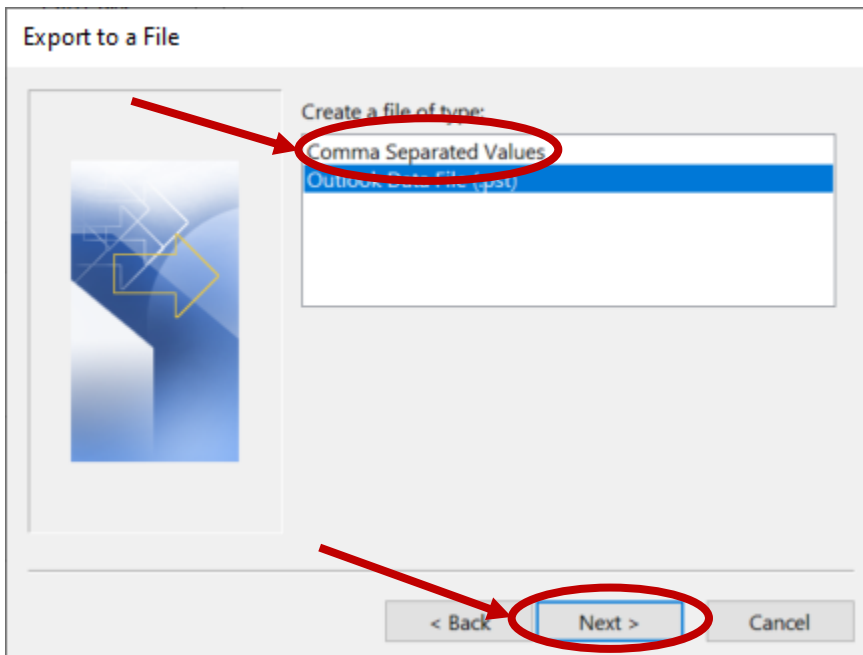
3. Select the **Import/Export** option.



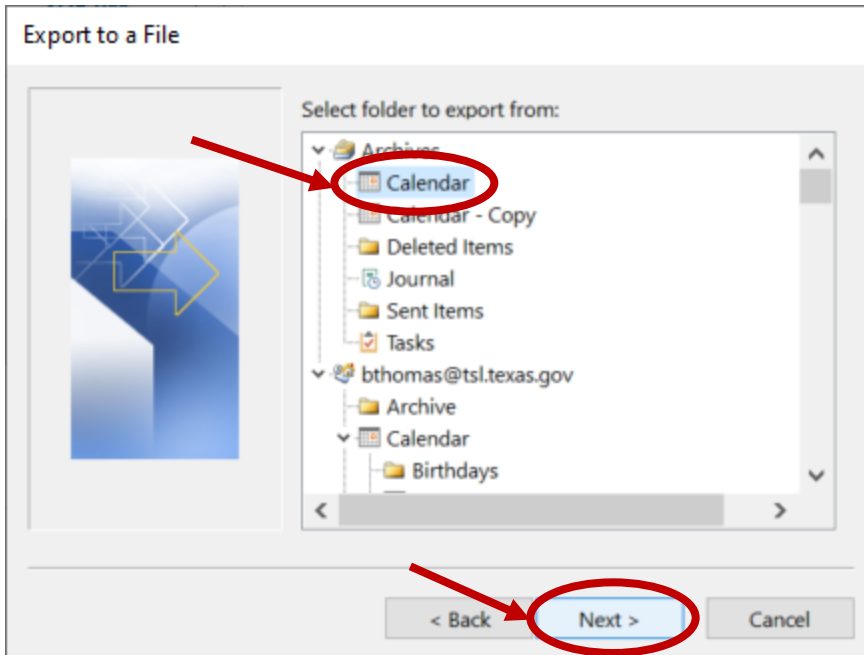
4. In the pop-up Import and Export Wizard window select **Export to a file** and click on **Next >**.



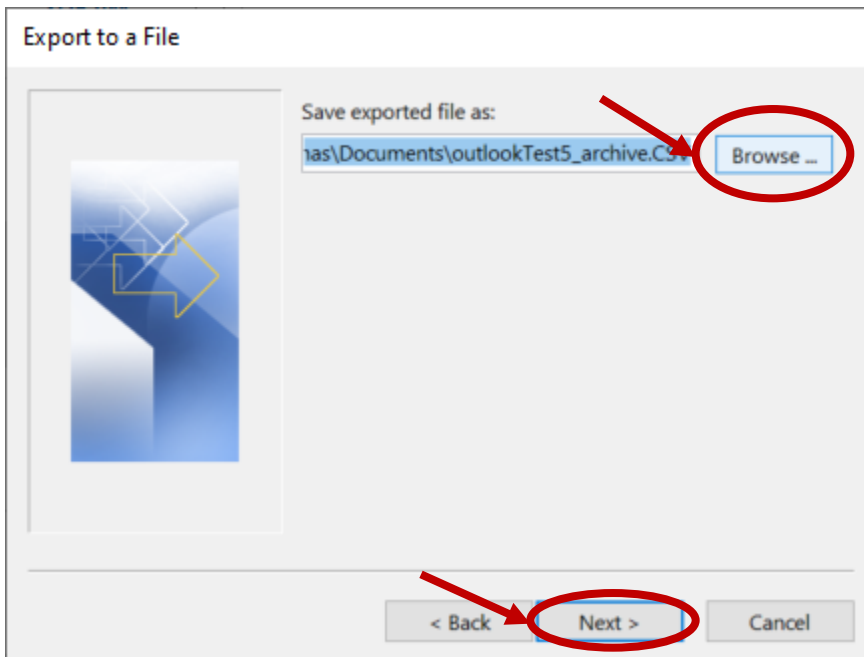
- Next Choose **Comma Separated Values** and click **Next >**.



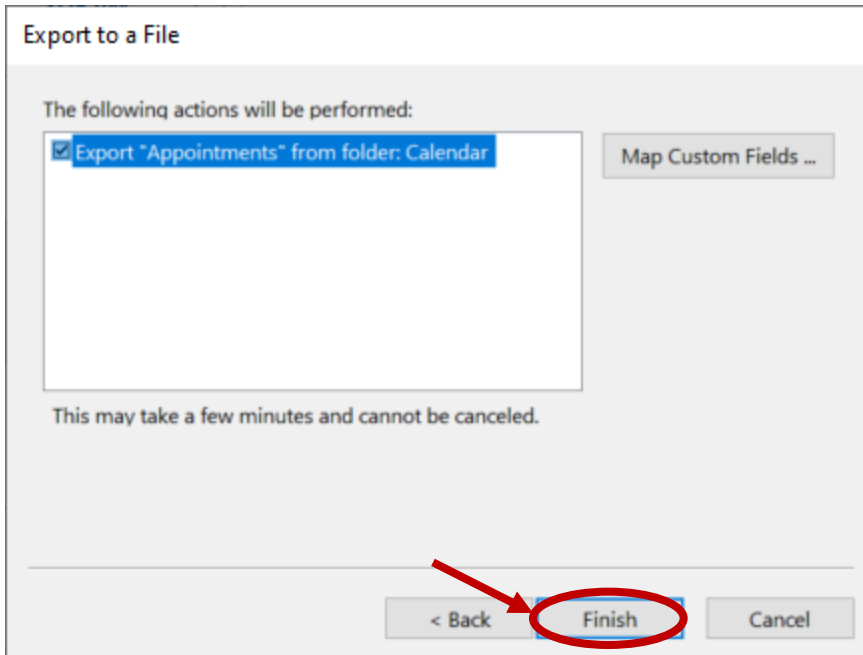
- This screen will look slightly different that the one for exporting a .pst file. Under archives, select **Calendar** and the click on **Next >**.



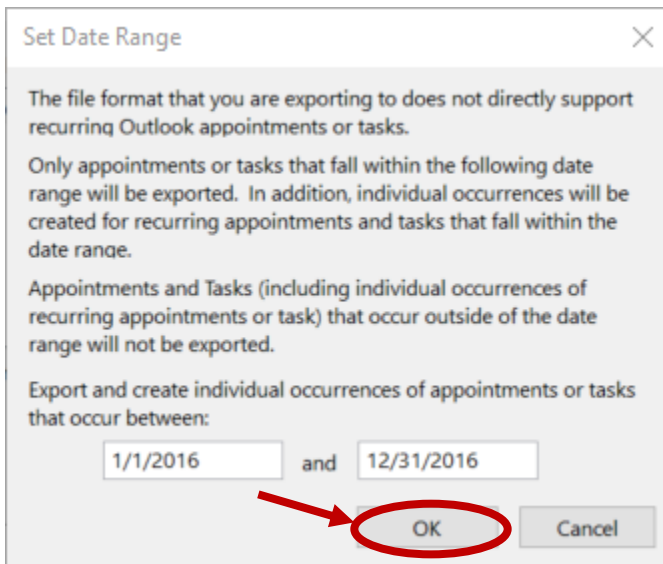
7. Click on **Browse...** to choose a save location for the file. Click **Next >** after that is done.



8. Leave the next window as-is and click on **Finish**.



9. In this last screen enter a date range of calendar items to export. Click on **OK**.

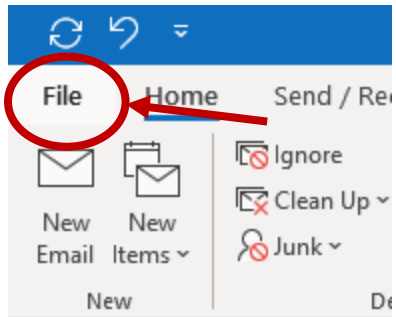


You can check that the file export if you like by going to the save folder you designated. Open the file in Excel to see what it looks like. The number of items will be the number of rows in the spreadsheet minus 1.

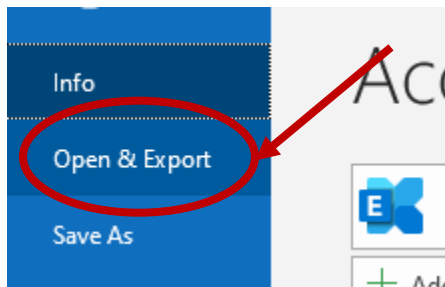
Checking the output

To make sure the file was made properly it is a good idea to try to connect to the archived calendar and see if it has anything in it. Compared to the previous steps, this is an easy process.

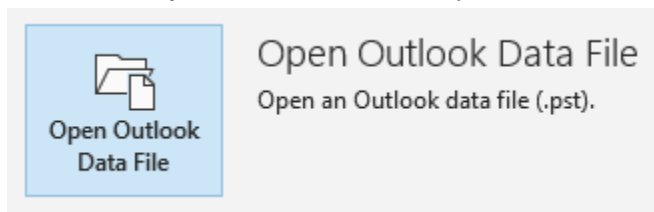
1. Go to the **File** tab.



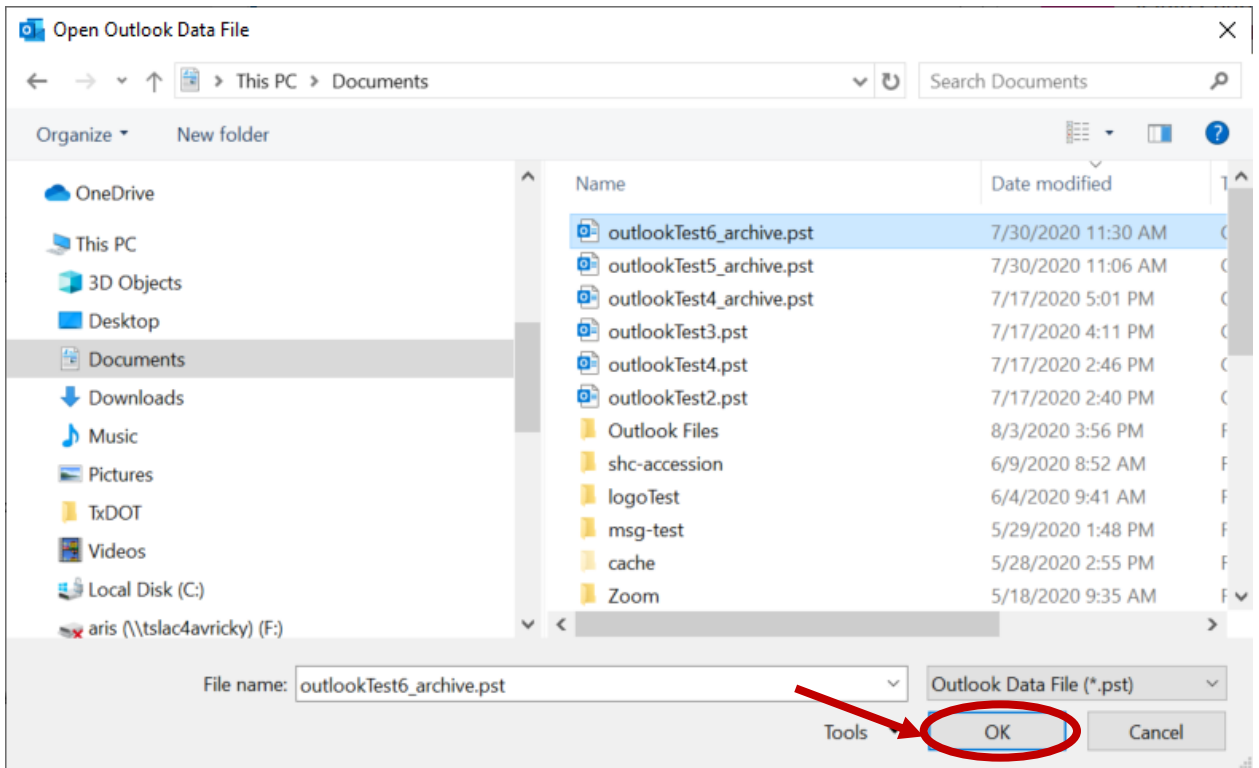
2. Select the **Open & Export** option from the left-hand sidebar.



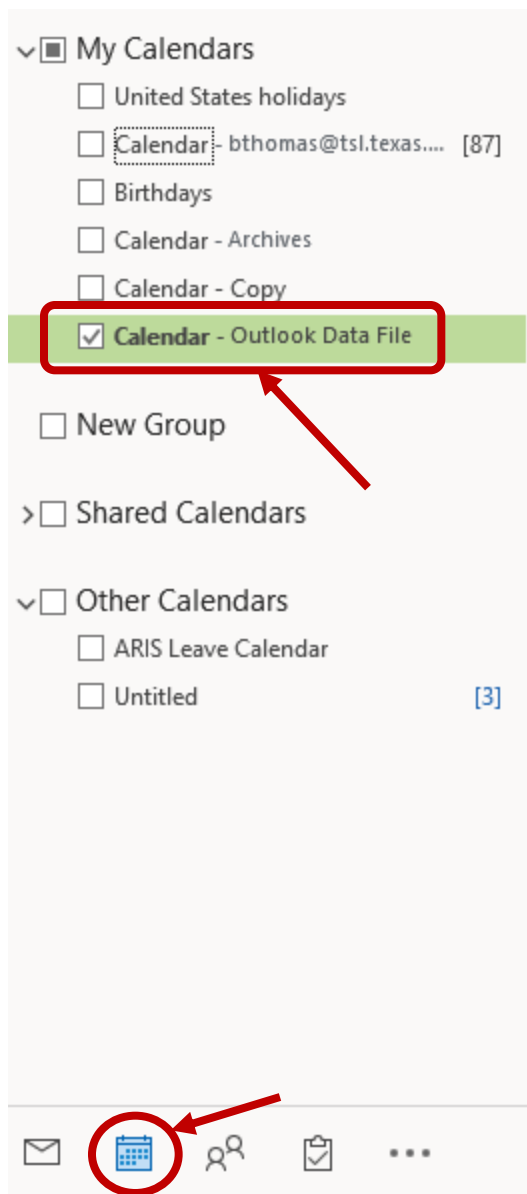
3. Choose the **Open Outlook Data File** option.



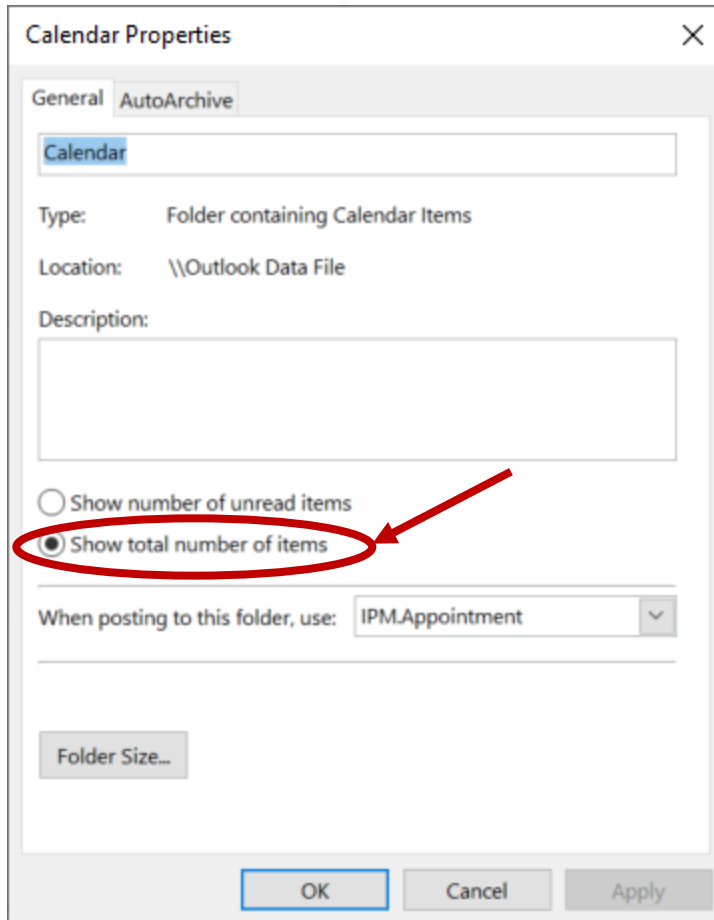
4. Navigate to where you saved the Outlook .pst file (like shown below) and click on **OK**.



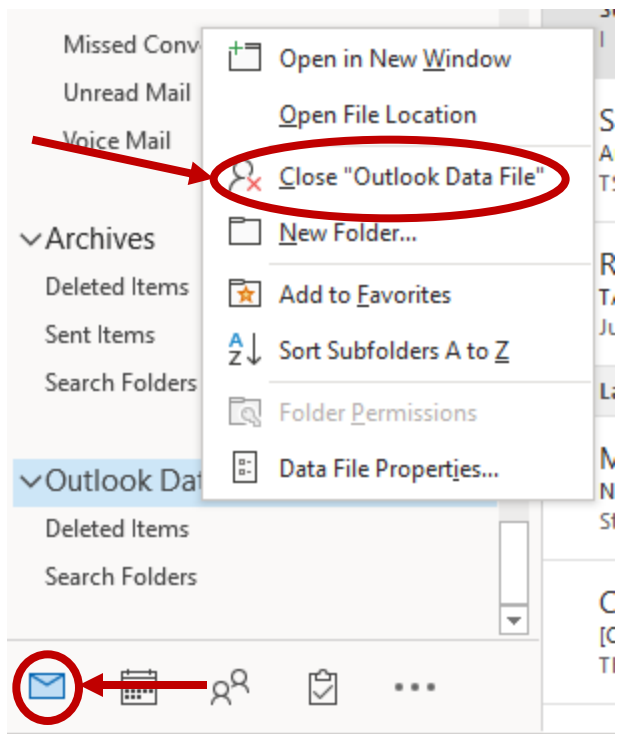
5. Go to the Calendar and check on the Box corresponding to the calendar you just connected to.



6. If you see the archive file this means it was created successfully. To check that everything is there, you can right-click on the data calendar you created and select **Properties**. Click on the **Show total number of items** radio button. Then click on **Apply** and **OK**. The number of calendar items saved should now show up next to the Calendar in Outlook. The number should match the number of items on the spreadsheet.



7. Make sure to disconnect the data file after checking it. You may not be able to transfer or otherwise handle the file otherwise. Go back to the Email section of Outlook and scroll down to the Outlook data file you connected to. Right-click on the file and select **Close [name of data file]**.



Getting help and sending the calendar to the State Archives

See the online instructions at <https://tsl.access.preservica.com/transfer/> for details on the best methods of transfer. If you need assistance or wish to talk with someone specific you may contact your TSLAC records analyst. They *will not* be handling your transfer but they should be able to direct you to the appropriate TDA staff member for additional help or concerns.

Text-only instructions

Use this if you only need a reminder of how to perform the steps for an export

Getting Everything together in one place

Check AutoArchive settings

1. Go to the **File** tab.
2. Choose **Options** from the left-hand sidebar.
3. In the resulting window, go to **Advanced** and click on **AutoArchive Settings...**
4. In the AutoArchive pop-up window, check the **Clean out items than** box and make sure the number of Months/Weeks/Days is sufficient to capture all of the Calendar.

Run AutoArchive

1. Go to the **File** tab.
2. Choose **Tools/Mailbox Settings** from the selection below the **Account Information**.

3. Click on the AutoArchive button. If the AutoArchive hasn't run in a while, or if you updated some settings, you will probably see a status bar on the bottom of the main screen.

The export function and its refinements

1. Go to the **File** tab.
2. Select the **Open & Export** option from the left-hand sidebar.
3. Select the **Import/Export** option.
4. In the pop-up Import and Export Wizard window select **Export to a file** and click on **Next >**
Next Choose **Outlook Data File (.pst)** and click **Next >**.
Now select what you want to archive. Scroll to the bottom of the **Select the folder to export from:** pane, expand **Archives** (if it isn't already) by clicking on the arrow to its left, and click on **Calendar**. Click on **Filter...**
5. In the Filter screen:
 - a. Go to the **Advanced** tab.
 - b. Click on the **Field** drop-down menu and select **Created**.
 - c. In the **Condition** next to created select **between**, it is towards the bottom of the condition options.
 - d. In **Value** enter the first beginning and ending dates using the word "and" as a separator. Like show below. Dates are in the m/d/yyyy format (no leading 0 if a number is less than 10).
 - e. Click on **Add to List**.
 - f. Then click on **OK**.
6. You should return to the previous window. Click on **Next >**.
7. In this last screen choose the name of the archive file you wish to create. Click on **Browse** to choose a save location and file name. To be safe *it should not be named archive or outlook* because those are common names assigned to the normal archive file and if you use the same name and happen to be in the same folder you may over-write the original. Leave the **Options** as-is. Click on **Finish** to complete the process.

Exporting a spreadsheet sidekick

1. Go to the **File** tab.
2. Select the **Open & Export** option from the left-hand sidebar.
3. Select the **Import/Export** option.
4. In the pop-up Import and Export Wizard window select **Export to a file** and click on **Next >**
5. Next Choose **Comma Separated Values** and click **Next >**.
6. This screen will look slightly different that the one for exporting a .pst file. Under archives, select **Calendar** and the click on **Next >**.
7. Click on **Browse...** to choose a save location for the file. Click **Next >** after that is done.
8. Leave the next window as-is and click on **Finish**.
9. In this last screen enter a date range of calendar items to export. Click on **OK**.

You can check that the file export if you like by going to the save folder you designated. Open the file in Excel to see what it looks like. The number of items will be the number of rows in the spreadsheet minus 1.

Checking the output

1. Go to the **File** tab.
2. Select the **Open & Export** option from the left-hand sidebar.
3. Choose the **Open Outlook Data File** option.
4. Navigate to where you saved the Outlook .pst file (like shown below) and click on **OK**.
5. Go to the Calendar and check on the Box corresponding to the calendar you just connected to.
6. If you see the archive file this means it was created successfully. To check that everything is there, you can right-click on the data calendar you created and select **Properties**. Click on the **Show total number of items** radio button. Then click on **Apply** and **OK**. The number of calendar items saved should now show up next to the Calendar in Outlook. The number should match the number of items on the spreadsheet.
7. Make sure to disconnect the data file after checking it. You may not be able to transfer or otherwise handle the file otherwise. Go back to the Email section of Outlook and scroll down to the Outlook data file you connected to. Right-click on the file and select **Close [name of data file]**.