

Library & Archives: Records Management

Email Management Guidelines

How should I organize my email?

Try to sort your email into a file system within Outlook that resembles the way you organize your paper files. Generally, you should have very few messages in your inbox. As soon as you receive a message, you should:

Determine whether or not you are responsible for retaining it, AND

- Move it to an appropriately named file folder, OR
- Delete it.

Determine whether or not you need to flag it for follow up or create a reminder.

- By right-clicking on the flag icon to the left of the message title, you can add your message to a "For Follow Up" list without moving it from the appropriate file folder.

Should I print my emails or save them electronically?

In general, it is preferred that files are kept and/or transferred to the Archives in their original format. However, significant emails can be printed in order to be filed with related paper documents.

Which emails should I save and which should I delete?

Email is an electronic form of correspondence; as such it is subject to the retention guidelines set forth in the general records retention schedule:

- Routine correspondence dealing with general administrative matters should be retained for three years and then deleted;
- Significant correspondence recording important transactions, projects, events and operations should be retained in office for seven years and then transferred to the Archives for permanent retention.

Some types of messages fall outside the scope of the general records retention schedule and may be deleted immediately:

- General bulletins and announcements, duplicate copies of messages, drafts, meeting notices, and messages from mailing lists
- Junk mail, spam
- Personal messages

You can refer to the email record decision tree on the next page for more guidance.

How should I save significant correspondence?

Create an "Archive" folder. When you no longer actively use a particular set of emails, simply drag the entire folder to your "Archive". This method allows you to retain the filing structure you created in your inbox and keeps your "archived" emails organized.

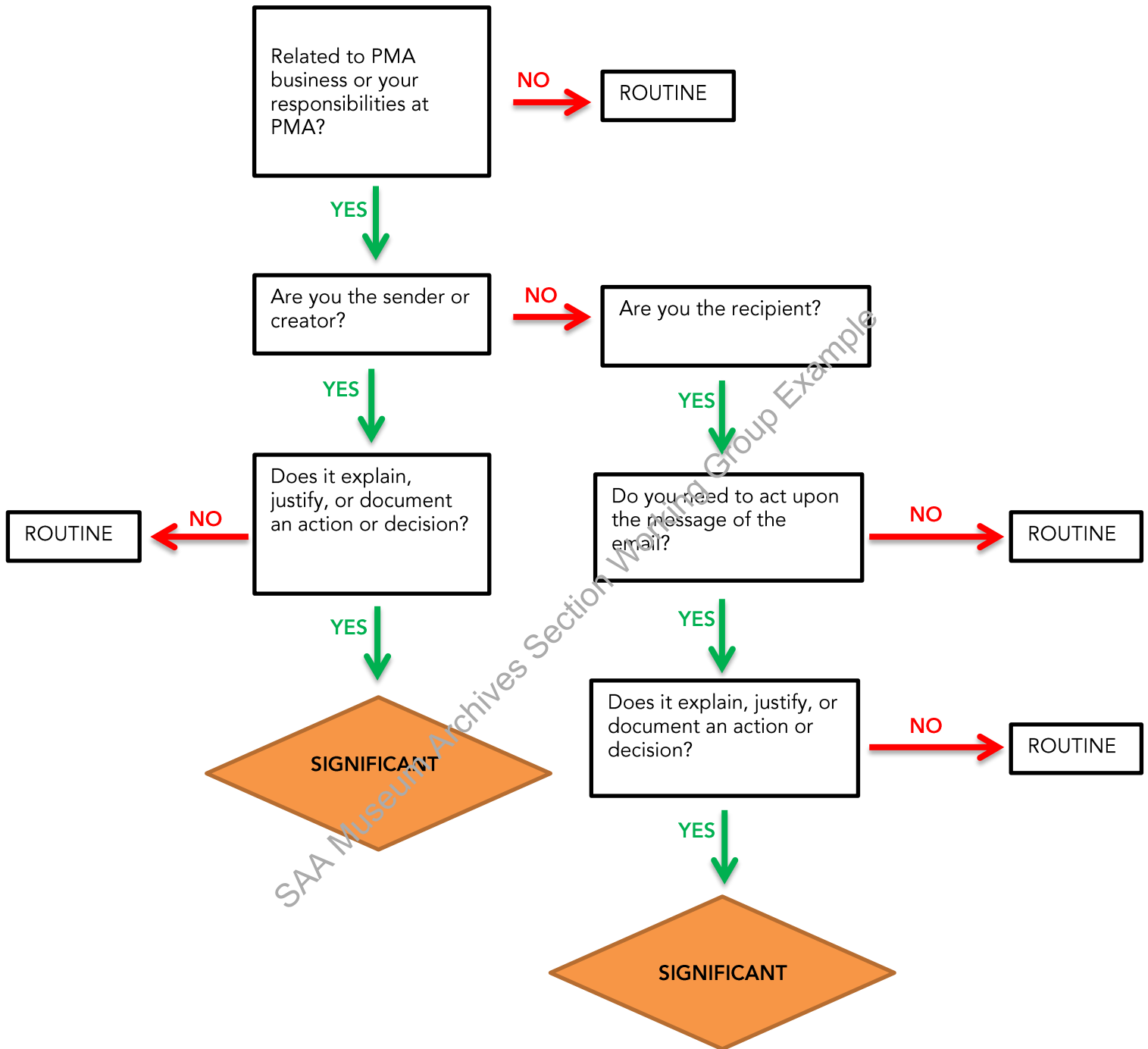
What do I do about attachments?

Retain a copy of the original email and attachment within Outlook on the email server; download significant attachments to a shared network folder if it needs to be shared or edited. In most cases where the attachment has ongoing value, the email should be retained in Outlook as it supplies the date, sender, and recipients as well as any cover message. Maintaining a connection between the original email and its attachments helps ensure the authenticity and integrity of the record.

Helpful Tips

- Use subject lines that clearly state the content of your message, which will help both you and the recipient use and retrieve the message in the future.
- Be conscious of the fact that personal email is a liability for the Museum; don't send any messages you would not feel comfortable sharing with your supervisor. You may refer to IIT's Computer, Email & Internet Policy for more details.
- Email does not manage itself. Be a proactive manager of your inbox and you will save yourself time by retrieving important messages quickly and efficiently!

Email Record Decision Tree¹



¹ Adapted from "Frequent Questions, Faqs, Records Management." EPA. Accessed December 10, 2014. <http://www.epa.gov/records/faqs/email.htm>.