

## *For the Record...*

### EMAIL MANAGEMENT

Members of the Memorial University community rely heavily on email as a means of communication. Email created or received as part of your work are considered university records and must be managed. Important tips to remember include:

- Do not use a private email account for university business;
- Do not say things in emails that you would not say in other forms of written communication;
- Do not destroy email records when they are relevant to an audit, ATIPP request or forthcoming litigation;
- Delete or forward personal email to a private account, or maintain it in a separate folder.

#### **Managing Email Messages**

Like any other type of record, email needs to be managed to ensure that it is secure, readily available when needed, accurate, kept as long as it is needed, and appropriately disposed of when it is no longer needed.

Some options for filing email are as follows:

- If your unit uses an electronic document management system, file email and attachments that document decisions and direction in that system.
- Print an email and attachment(s) and file them together if your unit has a paper-based recordkeeping system.
- Add the email to the relevant folder on a network drive. In Microsoft Outlook, this can be done by using the *File-Save As* option. To avoid saving multiple copies of the same email and to ensure the correct information is being retained, keep in mind the following:
  - When dealing with long email threads, provided that the thread has not been edited and all the previous emails are part of the thread, it is sufficient to keep the last email in the thread and to destroy the others.
  - Make sure to retain information in the header regarding the sender, recipients, date and time to preserve the context of the message.
- Email can be managed within the email system by creating folders that reflect your unit's file classification plan and moving email to these folders.

Retain messages that are sent and received only if they are related to university business; all other messages can be treated as transitory and deleted as soon as they have served their primary purpose (see the *Procedure for Disposal of Transitory Records* for more information).

Examples of transitory email types and their triggers for deletion are presented in the following table:

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TRANSITORY EMAIL TYPE	TRIGGER TO DELETE
Duplicates	When identified
"cc", "bcc" or "FYI" copies	When issue is resolved and/or information is no longer referenced
Announcements and notices	When the event has taken place
Superseded lists	When no longer needed
Supporting information	When no longer useful
Personal messages	When identified
Routine email – i.e. arranging meetings or events	When the meeting or event has taken place and/or no longer useful
Copies of records for which you are not responsible	When no longer useful

### Important Considerations in Composing Email Messages

**Subject Lines:** Because of the high volume of email, use a subject line that is short and descriptive. This will help your correspondents identify the incoming message and file and retrieve it for future use. Keep the subject lines consistent for all messages concerning a particular subject. Begin a new message if you want to change the subject. This prevents unrelated subjects from becoming intermingled.

**Addressees:** Ensure that messages are sent only to those who need to receive them. Be especially careful when using reply or reply-all functions and automatically completed email addresses.

**Attachments:** If possible, instead of attachments, reference a file location on a shared drive. If it is necessary to send an attachment, it is helpful to include a description of it in the text of the email to facilitate searching. When replying to a message containing attachments, remove the attachments unless required.