

CORPORATE ARCHIVES & RECORDS

Email Management Tip Sheet

Emails are official records of Carleton University just like the other paper or electronic files with which you work. As the creator of emails, your department and your staff are responsible for keeping these records properly. This includes knowing when to retain an email according to the Carleton University Retention Schedule and when an email can be deleted. Below are some tips to guide you in this work.

BE ORGANIZED

- Create folders within your inbox that mirror your electronic and paper file classification systems.
- Regularly file emails that are an official record of the university with your other electronic or paper files. Outlook is not a long-term electronic file storage solution.
- Understand what types of emails are transitory versus those that are official records and must be retained. (see page 2).
- Retain the headers in series of emails so that the office and person of origin as well as the context is clear.
- If you or your office created the email, you are responsible for making sure it is filed and saved appropriately.
- Save relevant attachments within your file classification system.
- Prior to personnel changes or retirements, work with staff to review their Outlook to identify any official records and retain accordingly

BE CONSISTENT

- In the same way that you title paper files, use consistent, concise, and clear subject headings.
- Make sure drafts are clearly labelled.
- Do not cc people who do not need to be included.
- Keep personal emails to a minimum.
- Regularly delete transitory emails and empty the Trash Folder.
- Remember that email is official correspondence and disclose information accordingly.
- As much as possible, limit the contents of an email to one subject.
- Schedule a regular time to maintain and manage your email.

Not sure what to do with an email? When in doubt, do not throw out! Keep the email and consult the Corporate Archives:

Carleton University Corporate Archives and Records

corporate.archives@carleton.ca

613-520-2600 ext. 5097

OFFICIAL EMAILS vs TRANSITORY RECORDS

Official Emails

- Emails that you create or receive may be an official record if the message:
- Documents formal agreements, confirmation of actions or decisions taken.
- Originates from external sources and contains significant information related to the operation and work of the university.
- Conveys opinions, decisions, or positions of university staff, faculty, departments, committees and other governing bodies.
- Documents approval or evolution of a document.
- Provides information on work plans, schedules, assignments and performance results.
- Documents external deliverables or obligations.
- Provides information on final reports and recommendations.

RETAIN AS RECORD

Transitory Records

Transitory records are records that are required for only a limited time. This includes emails that are for reference, to collect information to create other records, or to complete routine actions. These should be deleted once they have served their purpose.

Convenience & draft copies

- Preliminary drafts that do not record significant changes or decision-making processes.
- FYI or “cc” copies for which no action by your office or you is required.
- Minutes and agendas originating from other departments or committees in the university.
- Newsletters originating from other departments or committees in the university.

No operational value

- Personal or collegial messages such as confirmation of lunch plans.
- Business messages to schedule or confirm meetings.

General announcements

- Notice of meetings, holidays, or special events.
- Memos to all staff or university for which you or your office is not the creator.

RECYCLE OR DESTROY AFTER USE.