

The Archives of the Episcopal Church
EMAIL MANAGEMENT UNDER THE RECORDS RETENTION POLICY

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The following is offered as best practices for the management and archiving of email:

A. Who Is Responsible for Keeping Email Records?

Sender: all emails that pertain to business

Recipient:

- External emails
 - All related to business and you are the prime or only recipient
- Internal emails
 - If action is required
 - Recipient is the keeper of records for a particular business activity

B. What messages do I keep?

Emails are records and should be retained if they fit one of the following categories:

- Document a decision
- Document the formulation of a policy
- Contain information upon which decisions will likely be made
- Outline procedures
- Give guidance
- Commit the organization to a course of action, including allocation of resources and purchases
- Record contractual undertakings
- Prove a business event or activity did or did not occur
- Initiate, authorize, or complete a business transactions
- Identify who took part in an activity
- Satisfy a legal or compliance requirement involving employees or property
- Facilitate business analysis and organizational reporting
- Display public accountability for policies or statements of position

C. How Long Do I Keep Emails?

1. Executive Administrative – These are permanent records.

Includes: Policy and program planning, official communication, transactional approvals, and statements about implementation.

- Keep in subject mailboxes

2. Administrative Support Messages – Generally kept calendar year + 2 yrs.

Includes: Travel, meeting appointments, acknowledgments, ordering correspondence, general circulars and “blast” announcements, etc.

- Keep in subject mailboxes dated by year
- Notify Archives when ready for deletion

3. Temporary Communication Messages – Messages that can be deleted immediately after use

- Building announcements
 - e.g., “Food on the mezzanine,” event invitations
- Routine courtesy emails
 - Includes: Transmittals, reminder notices, forwarded mail that require no action, confirmations, announcements, etc.
- Messages that simply transport an attachment
- Meeting arrangements and reminders already noted in a calendar
 - e.g., “2PM in the 5th floor conference room, everyone.”
- Mass event announcements received as a circular to all members
- Personal messages

D. Email List Services, Bulletin Boards and Online Forums of the Episcopal Church - Review for historical purposes.

Retention of internal communication services should be assigned to an appropriate staff person who has the skills to take responsibility for keeping the record copy of important internal (within the Church or diocese) email lists and posting services. For those with record keeping responsibility in a particular area, these records should be kept permanently depending on the purpose of the list. Content related to announcements and discussion on Church business, programs and ministries should be kept while informal networking and chat may be scheduled for periodic deletion.

E. Email Practices

1. Creating Messages

Consider the following when creating emails:

- Is email the best method of communication? Would a telephone conversation or short meeting work better?
- Subject lines: Be brief and specific. Use one subject per email.
- Flag or code the emails. Code emails using Outlook flags or use text in the subject line. Using codes such as Action, FYI, Important (be sparing), Confidential will help the recipient manage the email and will help Archives appraise the email.
- Is it necessary to copy everyone? Use copies judiciously.
- Use CC address for FYI messages: This makes it clear that the recipient is not responsible for permanent retention of the email.
- BCC: This may go into Archives, be sure you want to use it.
- Reply All buttons: Be careful, it is easy to make a mistake.

2. Email Conversations / Strings

- Limit to one subject
- Keep the entire string intact
- Save the last message for your records – delete the rest
- If a new topic is introduced, start a new string

3. Managing Your Inbox – *Open email, read, act, file!*

- Set aside a time each day or once a week to read through and sort
- Judge importance by sender, flags, subject lines
- Deal with most important messages first
- Use Outlook rules to automate filing

4. Saving Messages – Best Practices

- File saved emails in a structured or subject folder system
- Save important emails in a filing system outside the email program
- Print business critical files (e.g. minutes) to paper or save as a .txt file in the relevant directory on the network drive.

F. Managing Storage Limitations in a Microsoft Outlook Environment

1. Managing PST Files (Personal Folders / Archive Folders)

- Although Microsoft Outlook will ask users to “archive” their email, the program does not offer a way to permanently retain or access files outside of Outlook. It offers the user two pre-defined options. Both options involve saving files in a proprietary Microsoft format called “PST” (Personal Storage Table).
- PST (*.pst) files are sometimes downloaded to a local drive and called “Personal Folders.” These Personal Folders are often set up to temporarily store recent email activity.
- In other instances, “Archive Folders” are created by Outlook to accommodate inactive email, and these also exist as a separate storage folder. Again, the default for the Archive Folder is the local drive.
- Every user should be aware that the default setting to save email on a local drive presents back up and stability issues.
- *NOTE:* PST is not a stable, archival format. The Archives has created instructions (see Addendum) to bridge this difficulty. These instructions are best practice “work-arounds” for maintaining and backing up PST email files until they are retired permanently.

2. Attachments

Sending:

- Avoid attachments. Use messages that link to documents on the network for internally sent emails.
- Delete large attachments, such as Power Point files with images, from sent messages.

Receiving:

- Save attachments into departmental workspace, in appropriate directory and delete from email.
- Do not use .msg format – there is no assurance that this document format will be readable in the long term.
- Delete emails that simply transmit a document after saving the attachment.