Quick Tips for Email Management

Good email management helps an agency meet its legal requirements. It also allows users to find necessary information quicker and with less effort. The guidelines listed below aim to make email more accessible for both end users and records managers, and correspond with Tier 1 email management as laid out in Kris Stenson's 2/18/14 presentation *The State Records Act and Electronic Records.*

Getting organized:

- Utilize good subject line descriptors and be specific to allow easier searching later. You should avoid vague subject lines such as "question" or "meeting." Instead, include details such as "question regarding filing procedures on form 536-B."
- You only need to keep the last email in a conversation string, providing no message information has been deleted from the string. Duplicate footers (disclaimers, big signature files, etc.) that build up at the bottom of the string do not count as part of the message information, and can be deleted for easier reading and reduced size.
- If the conversation veers to a new topic either create a new email string (preferred), or re-label the subject line. If the second option is chosen, make sure to save the last instance of the old subject line of the original string, as well as the last message of the new string (two separate strings splitting from one).
- Don't forget your sent file. Records from your sent file must be filed with the rest. Both incoming (inbox) and outgoing (sent folder) messages can be filed together, unless directed otherwise by your administrator. This allows for easier searching and less unnecessary clutter.

Storing and deleting emails:

- Many emails are considered "transitory messages." **These are not considered records.** These are messages that have only short-term value, and should not be kept beyond their initial usefulness.

Examples of transitory messages include:

- SPAM, advertisements, copies of listserv messages not generated by the employee
- Reminders to employees about scheduled meetings or appointments
- Announcements sent regarding office events, birthdays, lunches, etc.
- Recipient copies of agency-sponsored events such as exhibits, lectures, workshops, etc.
- Personal correspondence not related to work duties

Transitory messages can be kept as long as the user needs them, but should not be filed as records. Once these messages are no longer useful to the immediate user they should be deleted. This means they can even be deleted immediately upon receipt.