Checklist for Email Clean-up

University employees are responsible for the on-going management of their email. Spending five minutes daily managing email helps greatly in keeping the volume of email information under control, in safeguarding University records, and in sharing and finding information faster. This guide is intended to help you get and keep control over your email.

1. Know which email Messages to keep

Email messages that document or provide evidence of the University's business activities must be managed according to the University of Lethbridge Classification System (ULCS). Use the University and Transitory Records Decision Diagram to help you differentiate between emails that are University records and those that are transitory. When in doubt, keep the record.

Note: In the case of a FOIP or litigation request, you **are not permitted to dispose** of any relevant transitory (or University) records in existence at the time that you received a FOIP or legal hold notification, or should have reasonably anticipated litigation. The same rule applies to any subsequent transitory records created. See the Legal Holds on University Records policy for further information.
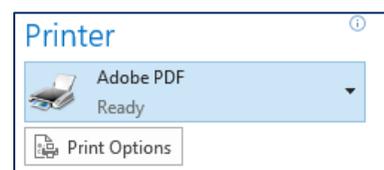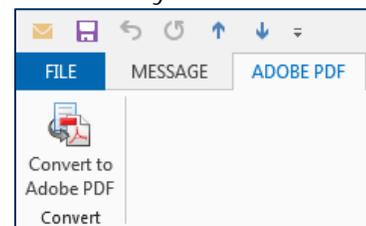
2. Sort email messages & delete transitory records

Email messages can be sorted several different ways. Use as many as necessary to efficiently identify the types of records you have. As you do this, delete any emails that you have determined are transitory or non-university records.

- By type of email message
  - Meeting invitations and receipts can be deleted
  - Messages received only as a 'cc' or 'bcc' can usually be deleted
- By conversation (subject)
  - Messages in a series: If the last email message in a thread contains all the information from the previous email messages, only keep the last message.
  - Separate replies: When several recipients have replied separately to an email message, only the original email can be deleted.
  - Requests for information and "FYI" emails can be deleted when they are obsolete.
- By sender
  - Email messages from mass-mailings, distributions, generic email accounts, and mailing list or listservs can be deleted unless you are the Office of Primary Responsibility and the message contains a University record.
- By date
  - Sort email messages by date, starting with the oldest and verify that any University records have already been filed before deleting.
- By size
  - The largest email messages likely have attachments. Email systems should not be used to store attachments.
  - If the attachment is a University record that has already been saved in an office recordkeeping system, the email message can be deleted.
  - If the attachment is a University record, but the email message is not, save the attachment to an office recordkeeping system. Otherwise save both the email and the attachment. Delete the email message once the records have been saved.

3. Move University Records to a Recordkeeping System

Until the University adopts an electronic records management system, you have two options for managing emails as University records:

1. **Print** the email and file it appropriately in the existing recordkeeping system.
2. **Save** the email to a shared network drive. There are a couple of ways to do this:
   a. **File as .pdf** to organized folders on the shared drive. Outlook has two ways to do this:
      i. Use the Convert to Adobe PDF function in the Adobe PDF toolbar in Microsoft Outlook (requires Adobe Acrobat; contact the ITS Solutions Centre if you do not have this). The default settings of this tool ensure that all attachments and hyperlinks are preserved in one file.
      ii. Select Adobe PDF as the printer in the print options menu. Printing to PDF does not maintain hyperlinks or attachments, so this should be used only for documents that either do not contain hyperlinks or do not contain any that are relevant to the record. Any attachments will need to be saved separately.
   b. **File as .msg** to organized folders on the shared drive. To do this, just drag and drop the email from Outlook to the shared drive folder. This preserves the entire message, including all attachments, but users must have Microsoft Outlook installed to be able to open .msg files.

Regardless of which option you choose, be sure to delete the source email once you have confirmed that the record has been filed appropriately.

4. Keep Your Email Organized

- Make clearing, classifying, and filing your email a part of your normal work routine. Spending five minutes every day managing your email messages will help you keep your email account organized.
- Transfer email messages containing information of business value to your office recordkeeping system within 30 days whenever possible.
- Delete transitory email messages as soon as they are no longer needed, including reference copies of records filed elsewhere.
- You are generally responsible for saving the information of business value to when you send email messages AND received them from third-parties.
- Manage your clutter, sent, and drafts folders, as well as your inbox and any other folders you have created to temporarily store your emails.
- Set aside regular purge days (e.g. semi-annually) to clean up your email

Related Resources

- Tips for Managing Your Email
- Quick Reference Guide to Transitory Records
- University and Transitory Records Decision Diagram
- University of Lethbridge Classification System
- Records Management Glossary