

There are several misconceptions associated with email management.

1. Every email should be kept forever
2. Folders can be created in Outlook, so moving emails from the inbox and into these folders is the best way of managing them.
3. Deleting emails over a certain age is fine if it means the inbox doesn't get too full, or
4. All emails should have the same retention period.
5. I need to keep all my sent and received emails

An email is actually just a record like any other like any other created or received by the University. The only difference with an email and a hard copy letter is the manner in which it is communicated, namely sent electronically using an email tool (such as outlook) as opposed to hard copy delivery in an envelope.

What emails should be kept?

There is no one rule for defining which emails can be kept and which ones should be deleted. As with any records, it will all be dependent upon the content of the email(s) in question. The types of email we might retain include (but not limited to):

- Emails where important decisions are made or that show why a decision was made
 - Might be used historically to show why something happened (e.g. sign off a policy)
 - Could be used in court to defend a decision (e.g. financial, recruitment)
- Emails that initiate a piece of work or a course of action
 - Formal requests from the public
 - Formal complaints from students or staff
- Emails that hold historical value
 - What events have taken place
 - How did someone deal with a situation
- Where we legally required to keep the information contained in the email

What emails can be deleted?

- Emails that have no value beyond the immediate message – i.e. meeting requests confirming the room number,
- Emails where no decisions are made
- Spam emails
- Personal Emails – whilst staff are not encouraged to use a work email account for personal emails, it is natural that some might be sent from time to time. These are not university records and should not be retained.

How long emails should be kept for?

As with deciding what emails should be kept, there is no steady fast rule stating how long an email should be kept. Again it will be entirely dependant upon the content of the email and the defined retention period associated with that content. For example, if the email relates to a grievance investigation against a member of staff, the retention period will be entirely dependant upon whether or not the investigation is unsubstantiated (dispose immediately) or upheld (retain 6 years). The decision to retain should be made by the individual.

Managing emails outside of Outlook

Emails managed wholly within an email system such as Outlook, including those in an organised folder structure, are of no use to anyone except the person who owns the email account. Whilst **you** might be able to find an email in seconds using your outlook folder structure, it doesn't help your colleagues if they need to access information contained within an email when you are not there. Email content should be stored in an appropriate (secure) manner that enables all staff that requires access to them to do so.

Received Emails

In some case where a paper record is already in existence, it may be appropriate to print the email and insert the paper copy inside the physical record. The electronic copy should be retained in an outlook folder whilst the record is still 'live' but can be deleted when the record closes safe in the knowledge that the printed email will be retained for as long as the rest of the physical folder (based upon the retention period).

Printing copies of emails obviously increased the size of the physical record which increases the associated storage costs. Where there is no physical folder into which you might have placed a printed copy, or where you do not believe it appropriate to print out emails, they should be saved and retained electronically as text files on the shared network folder. Saving as a text file will retain the content of the email but lose the original formatting.

To save an email, open it and select:

- *File,*
- *Save as,*
- Select *Outlook Message Format* from the list.
- Select the Network folder you want to save the email to and click *save*.

This will save the content of the email to the network for other people to access it. The original email should also be retained within an outlook folder until the record closes.

Sent emails

Where an email is sent internally within the department, there is no need for everyone to save a copy. In this instance, the person sending the email should be responsible for the save.

As with any outgoing correspondence, a copy of a sent email should be retained where the content requires it. This should be done in exactly the same manner as received emails but from the '*sent items*' folder.

Attachments

Where you have received an email with attachments, you will need to save the email and the attachments together. To save an attachment, with the email open select *File, Save Attachments*. Select the Network folder you want to save the attachment to, assign an appropriate file name and click *save*.

To save multiple attachments, with the email open select:

Records Management - Managing Emails

- *File,*
- *Save Attachments.*
- Highlight the attachments you want to save in the “save attachments” dialogue box.
- Select the Network folder you want to save the attachment to and click *save*.
- Go to the folder and re-name the attachments using appropriate file names if required.