Quick Tips for Email Management (Tier 1)

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.

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.

- Email records should be sorted and stored just like their paper counterparts. While paper correspondence might be sorted into file cabinets, email messages should be sorted and kept in appropriate folders within the email system.

- Create folders for long-term retention based upon records series in your department, e.g. "Administrative Files," or "Policy Research." Follow your department's Records Schedule to identify appropriate labels. Your departmental records officer will have this information. Sorting emails into folders this way will allow for better automatic handling by Records Management and IT. You can create sub-folders within these to aid your own organization, but the main folders should be labeled according to the schedule.

- After removing transitory messages and those considered part of other series, the remaining messages in the Inbox and Sent folders should be considered "General Correspondence" and retained for the period of time dictated by the Records Schedule.

- The sender of any email message is responsible for keeping the "original." Messages received *internally* (from another person in your department or agency), *might not* need to be kept by the recipient.   Departmental rules on this may vary, so consult with your departmental Records Officer to determine what the case may be in your department. Messages received from *outside* the department or agency should be kept by the recipient and filed per the records retention schedule (excluding transitory messages).

Helpful definitions:

Record: A document created in the course of business that serves as evidence of the activities of a government agency. Records can be in virtually any format, including paper, electronic files, audio recordings and video recordings. (See ILCS 160/2 for more detail)

Records Officer: An individual in an organization who serves as the liaison between a unit and the records management program. You should know who your agency records officer is and consult with him/her if you have any questions regarding records management.

Record Series: A group of similar records that are arranged according to a filing system and that are related as the result of being created, received, or used in the same activity.

Records Schedule: A document approved by the Local Records Commission that identifies and describes an organization's records, usually at the series level, provides instructions for the disposition of records throughout their life cycle.

Transitory Messages: Communications containing information of short-term value. These can be in any format, and are not considered records.