

EMAIL MANAGEMENT GUIDELINES

As per *Policy on Email Management* ([SG-11](#))

Last update: September 3, 2013

CONTEXT

Records Management (RM) best practices have shown that traditional records management approaches cannot be applied to emails due to their large volume.

Don't forget:

- Emails are owned by the University and not by individuals. This means that they can be accessed and made public in case of legal, privacy or governance issues. **They are not private.**
- Emails are considered as general administration documents.
- Using email is a way to distribute information and not a way to retain it. Therefore, the email environment (Outlook or other) is not the place to retain, on a long-term basis, emails and their attached documents.

TYPE OF EMAILS AND RETENTION PERIOD

Type of email	Examples	Location	Retention period	Final Disposition
Personal	<ul style="list-style-type: none"> • Correspondence, Twitter, LinkedIn 	Mailbox	90 days	Destruction
Unofficial	<ul style="list-style-type: none"> • Internal Communication • Discussion Lists (e.g.,:ShopTalk) • Meeting requests (e.g.,:Outlook) • Duplicate copies • Informal notes 	Mailbox	90 days	Destruction
Transitory	<ul style="list-style-type: none"> • Response to inquiries • Civilities • Short term decision-making correspondence • Proposals and drafts 	Personal space folders (Private Drive) or Institutional Shared Drive	2 years	Destruction
Official	<ul style="list-style-type: none"> • Email supporting an important transaction (set policy, explain decisions) 	Institutional repository or Institutional Shared Drive	According to the Records Classification and Retention Plan (RCRP)	According to the RCRP

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If a “litigation hold” is placed on a record series or email group, *no records from that series may be destroyed*. It supersedes all existing records schedules.

HOW TO MANAGE EFFECTIVELY THE NUMBER OF EMAILS YOU RECEIVE?

- Use collaborative tools approved by Concordia to share documents
- Do not cc everyone, unless required
- Empty your Deleted items folder on a regular basis

HOW TO ORGANIZE EFFECTIVELY YOUR EMAILS?

- Leave emails that require quick follow-up in your Inbox
- Tag and categorize your emails as they are created or received. We recommend that you use the [Records Classification and Retention Plan](#) to file your emails.
- Create rules in your email program to delete unnecessary emails
- Create files with meaningful titles such as: “Faculty Council Meeting – 2013-08-25”

Don’t forget to be consistent!

OTHER TIPS



- Take 15 minutes/day to file your emails
- Manage emails from your Inbox
- Stop printing emails whenever possible
- Do not keep an email for someone else
- Don’t forget - emails are owned by Concordia

QUESTIONS?

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