

## Email Management

Email is a vital communication tool and the records created, received, and maintained should be managed as carefully as other University records. Not managing email can lead to several difficulties, including:

- Insufficient memory for email storage (there is a 100GB limit for individual accounts and 50GB limit on shared accounts).
- Problems with searching and retrieval valuable email.
- Increased legal vulnerability and risk in the event of legal discovery of electronic evidence.

## Email as a Record

An email record includes three parts, though not every email has all three. In order to preserve integrity (ability to act as evidence of an action), an email must remain intact and include all its relevant parts:

- The message
- The contextual information - the sender, recipient, time, date, etc.
- Any attachments

Here are some quick tips for working with email records that will keep email a useful tool instead of an overwhelming burden.

## Creating Email

- DO use your UTOEmail account for all University business.
- DO use a short, meaningful subject line.
- DO try to stick to one subject per message, to facilitate easy filing
- DO make privacy and confidentiality a priority by:
  - Minimizing the inclusion of others' personal information to what is strictly necessary (this includes students' information as well as faculty and staff)
  - Limiting the use of University email for personal messages
- DO NOT include any content you would not want publicly disclosed.
- DO NOT share your email password.

## Managing Email

It's easiest to manage an email shortly after it's been created or received, but it's never too late to start! Make sure you regularly schedule time to review your emails in order to make decisions about what to save, where to save it, and what to destroy.

## Organization

Setting up folders and subfolders can make it easier to save, search, and review your emails - especially if you have large amounts.

Suggestions for folders include:

- Group emails into folders by YEAR (potential subfolders include SENT and RECEIVED).
  - This is the easiest if you are starting from no folders!
- Group emails into folders that match your departmental filing system
  - This is best for searching and for managing disposition - including sending emails to the Archives or deleting.

**Tip!** When creating folders, you can set [RULES](#) that will review your inbox and move messages into those folders for you.

## Reviewing Emails

You won't need to read every email to make a keep or delete decision. Here are some tips to help you proceed.

- Delete any [TRANSITORY](#) and PERSONAL messages that are no longer needed
- Save any [UNIVERSITY RECORDS](#). These will be sent to the archive or deleted after a specific period of time as per your departmental file plan.
- Sort by SENDER or search by sender and review one sender at a time. This may also assist in identifying groups of messages that can be treated the same way.

## Disposition of Email

Like other records, email should be destroyed or sent to the Archives at the end of its life cycle.

Transitory emails can and should be regularly purged. Review our [Transitory Records Tip Sheet](#) for examples and contact the Records Manager if you have concerns or questions.

[Transitory Records](#): Records created or received that are temporarily useful. These records will have no further value beyond: Completing a simple transaction, Using to prepare a University Record, Acting as a convenient reference copy for an office or individual that does not have primary responsibility for that record.

For emails that are considered University Records, please check your departmental file plan for guidance on when to transfer to the Archives or when to destroy. Contact the Records Manager if you have concerns or questions.

[University Records](#): Any recorded information, regardless of format, created, received, or maintained by University academic, administrative, and governing bodies in order to support legal obligations or other University business operations and transactions.

Looking for more guidance on what to delete and what to keep? Review our *Email: Keep or Delete?* [tip sheet](#)!

## Other Resources

[UTARMS - Managing Email](#)

[General Email Help](#)

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