Prairie View A&M University

Managing your Emails
Why Manage Emails?

It's important to manage your emails because:

- It makes it easier to retrieve information.
- Lowers the storage costs associated with keeping the information on a server.
- Minimize risks by staying in compliance with record retention policies.
Email Categories

You would treat the emails the same as you would a paper record. Emails typically fall into the category of Correspondence (Record Series 1.1.007 or 1.1008).

- **1.1007 – Administrative Correspondence.** These emails usually pertain to the formulation, planning, implementation, modification of programs, services and projects.

- **1.1008 – General Correspondence.** These emails pertain to routine business operational activities such as meeting requests and interoffice messages.

It’s best to look at the content of the email to determine what record series they fall into. Ask yourself, “What activity does this email document?” and am I the custodian of that type of content? Once you answer that question, it would be best to start organizing your emails according to the appropriate record series.

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Emails that are **Not** correspondence

Make sure you are evaluating the email based on the content and this will help you determine what category they fall into and hence what record series they belong to and here are a few examples based on content:

- Leave requests
- Reports
- Meeting minutes or agendas
- Job applications

If you are the custodian of these types of records, then you would have to keep them for the time period as determined in the retention schedule.
Who is the Custodian?

The Custodian is the person who will be responsible for keeping the record copy for the full retention period.

The sender copy of the email is typically the record copy and hence the sender is the custodian.

The recipient copy is also a record if:
- You need to take some sort of action based on the content of the message.
- Message is required to serve as documentation of an action.
What NOT to keep

- Personal emails
- Unsolicited emails
- Spam emails
What do I keep?

The emails that you need to keep are the ones that the content relates to your job responsibilities/duties or that you are the custodian of that content. Review the Record Retention Schedule to see who the custodians are for certain records.
Email Decision Flow

- **Is it a record?**
  - No: Delete or forward to the custodian.
  - Yes: Is it related to your job?
    - Yes: Are you the custodian?
      - Yes: Keep and file it.
      - No: Delete or forward to the custodian.
    - No: Keep and file it.
Email Filing System

To better handle your emails it’s best to establish some sort of filing system. It should be simple and easy to use.

1. Do some preliminary sorting and delete those emails that are non-records (personal emails, unsolicited emails and spam).
2. Identify which ones are record copies. (Sender copy is typically the record copy and the recipient copy can be a record copy if it asks you to take or document some sort of action).
3. Classify the emails by using the retention schedule to assist you in figuring out how long to keep them.
4. Come up with a naming convention for your email folders. Keep it simple and possibly use the record series so that way it will be easier to do disposition.
5. Group similar emails together and create subfolders if necessary. (If you have a correspondence folder and the retention is 1 fiscal year, then just create a Correspondence folder and then have subfolders that are based on the fiscal years).

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Making it Work

- Don’t try to do it all at once.

- Try and devote some time on a daily basis to review and sort your emails.

- When creating emails, make sure you use meaningful/descriptive subject lines.
  - “Quarterly financial report” instead of “Report”
  - “Revised policies” instead of “Important”
  - “Leave request” instead of “Out today”

- Limit the use of “Reply All” when responding to emails.

- Use the Rules feature of Outlook to help manage your emails.