Managing the Digital University Desktop

Understanding and Empowering the Individual; Preserving the Public Record and Institutional History

How do I file the email I need to keep?

Organizing and managing email is the responsibility of the individual University employee, and can be quite a challenge considering the volume of email sent and received on the campus every day. Assuming that you have already decided your email is an official record that needs to be kept, establishing a simple filing scheme based on either your office's records retention and disposition schedule or some other agreed-upon file structure will provide an efficient way to organize, retrieve, delete, or preserve your email messages. These simple guidelines are suggested for the individual email user. If email messages are intended to be stored on a network server, organization schemes should be set up in consultation with system administrators and others accessing the network.

A good **filing structure** for your email should provide:

- Ease of searching for specific messages;
- Ease of applying disposition instructions (deleting or retaining messages over time);
- Reduced risk of keeping email messages beyond their specified retention period;
- Better management of your email inbox; and,
- Cleaner, neater, more organized email folders.

When choosing a folder title, it is important to use a name that accurately describes the messages you will file there. If the email folder title matches the record series title in your retention schedule, you will find it much easier to manage the email records. You may also need to include more information in the email subject line for easier retrieval. For example, your office's retention schedule has a record series called "Travel Requests and Reimbursements File" and the disposition instructions say to "Erase/destroy in office records in paper and electronic formats 3 years after released from all audits." In order to properly manage the email messages relating to this series, you would probably want to set up the following folders within your email system:

- Travel Requests and Reimbursements FY 2003/2004
- Travel Requests and Reimbursements FY 2002/2003, etc.

When a folder has met the "3 years after released from all audits" retention period, you can then delete it. Remember to file any existing attachments with the email, unless you have already saved them to a different location.

Email should be managed by its content, not its format.