MANAGING EMAIL FOLDERS

Overview

Standard government email boxes / folders include:

- ➢ Inbox
- ➢ Sent Items
- ➢ Drafts
- ➢ Deleted Items

Email boxes/folders are not suitable for the ongoing management of government records. When official records are kept in individual email folders instead of being filed in the office recordkeeping or shared filing system, the following **problems** occur:

- **Restricted access**. No one else in your work group has access to, or knowledge of, these messages.

- **Difficulty searching for records**. Emails may be missed when needed for operational or administrative purposes, when responding to a request under the *Freedom of Information and Protection of Privacy Act*, or during the document discovery process for litigation.

- **Fragmented office files**. Records are scattered across various email accounts rather than being filed together with other records that relate to a specific activity, case, or topic in the office recordkeeping system**.**

- **Uncertain status**. Is the email still needed to complete government business? Should it be filed? Should it be deleted?

1. Basics

- Regularly review the contents of your email folders and move any official non-transitory messages relating to government business into your office recordkeeping system (e.g., *ARCS* or *ORCS* folders in TRIM EDRMS, on the LAN/fileshare, or in physical files). Once the official file copy of the email is filed in the office recordkeeping system, the source record/email may be treated as **redundant** and deleted when no longer needed for reference.

- Promptly delete any non-government or **personal** messages.

- Review and delete any messages with temporary or **transitory** value to government.

- Make clearing, classifying and filing your email a part of your normal work **routine**. Consider choosing a specific time each day or week to manage your email.

- **TRIM** users: Link Outlook folders to TRIM folders to automate filing into EDRMS.

2. "Inbox" and "Sent Items"

If it isn't possible to either delete or file the email you send and receive immediately, you can set up **sub-folders and rules** as an interim measure to review and manage your email (however this is not a method for permanently filing official records; see Overview for reasons). For example:

- o Establish a **rule** directing certain types of messages (e.g., from electronic mailing lists) to an appropriate inbox sub-folder.
- o Include the **file code** (*ARCS* or *ORCS* primary and secondary number) in the sub-folder name to facilitate retention and filing into the central filing system.
- o If you use EDRMS TRIM, you can set up **linked folders** to allow for either a one-time load of all email from an Outlook folder or for ongoing automatic cataloguing into TRIM.

3. "Drafts"

The Drafts folder is where the records you initiated/created are retained by the system until you send or delete them. Monitor the contents of this box and delete any messages that are now outdated or superseded.

4. "Deleted Items"

When email messages are authorized for destruction and deleted they are transferred to the Deleted Items folder. Recommended practice is to **set your preferences to automatically empty** this folder when you exit. If you need to recover a message, the government email system allows a two week window in which to restore deleted email.

Additional Information

Contact your Records Officer or check out the rest of the Records Management website.