

GOVERNMENT RECORDS SERVICE GUIDE

EMAIL TIPS



Email messages occupy a significant amount of any organization's data storage space. Managing these unstructured records is always a challenge. The following tips should help you manage your email.

1. Keep Messages to a Single Topic

- Create separate messages for separate topics.
- Don't mix personal messages with business messages.
- Create a new email with separate message when an email chain starts to address more than one topic (see section 5 for more advice).

2. Be Specific in the Subject Line

- Create a clear and descriptive subject title/line.
- Give recipients enough information to quickly manage the email.
- Use the title to indicate actions, purpose and any due dates or status of actions. For example, emails labelled 'FYI', 'work/life' or 'Thank You!' can generally be treated as transitory records, while those flagged 'Answer', 'Question', 'As Requested', or 'Follow up' will often need to be kept and filed.

Standard Email Subject Keywords

- Action by <date>
- FYI:
- Phone Msg:
- Work/Life:
- Heads Up:
- Follow Up:
- Question:
- Answer:
- Request:
- As Requested:
- As Promised:
- Thank You!

3. Limit the Number of Copies and Recipients

- Limit main recipients to those who are expected to take action or make decisions based on the message content.
- Use 'cc' option when sending messages to recipients for informational purposes only, i.e., if recipient does not need to comment, retain or reply to the message.
- Avoid using the 'reply all' function except in cases where every member on the distribution list needs to receive the message.

4. Limit the Use of Attachments and Graphics

- Whenever possible, post the attachment to a shared location (e.g. EDRMS TRIM, shared LAN directory or SharePoint) and send a link.
- Send attachments only to those individuals who require a copy of the document (i.e., avoid using large distribution lists and the reply-to-all icon).

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5. Manage Message Discussion Chains

Message discussion sequences generally include previous text from the various senders and recipients to the discussion. This practice creates a complete record, but can be difficult to manage as new discussions and topics emerge during the exchange of emails. Here are some methods for managing chains:

- Indicate if no reply is needed.
- Do not re-send attachments with a reply unless it is necessary.
- Stay on topic. Don't add unrelated material, if the discussion changes significantly, create a new email instead.

6. Eliminate Junk Mail and Transitory Records

- Delete messages that are only of temporary usefulness, i.e., transitory messages. These messages are typically needed a short period of time and not required to document government business. See the [Transitory Records Special Schedule 102901](#).
- Promptly dispose of junk mail and personal emails. Neither should remain for long on the government email system.

7. File Official Email and Attachments (Non-Transitory)

File needed email and attachments within your office recordkeeping system. Once the official copy is filed, the source record/email may be treated as [redundant](#) and deleted. It is helpful to include government standard classification numbers (i.e., [ARCS](#) and [ORCS](#) secondary codes) within email messages to facilitate filing and retrieval.

8. Manage Your Inbox

- Handle each message as few times as possible. When you open it, decide whether you will deal with it, delegate it, or delete it.
- Create special folders in your inbox for outstanding email that cannot be actioned immediately.

Additional Information

Contact your [Records Officer](#) or check out the rest of the Records Management website.

