E-mail Management

Key Issues to Consider

Now that you are familiar with the operational and legal importance of managing e-mail messages as records, you can use the questions below to begin the development of your e-mail management policy. Discussion of the questions below will help:

- Ensure that you meet your legal and operational requirements
- Gather staff member input, support, and compliance with your e-mail management policy
- Integrate your records management policy with your overall electronic records management strategy
- Ensure that staff members manage e-mail records at the appropriate points in the records continuum, rather than as a single records series with one retention schedule (as explained in the *Records Management Strategy* guidelines)

Discussion Questions

- How can we ensure staff member compliance and understanding? What process is reasonable to ask staff members to comply with?
- How should we train staff members? How accountable should we make staff members for compliance?
- How should we develop our process?
- Which e-mail messages are records?
- What elements of an e-mail record do we need for a complete understanding of the transaction?
- What is the appropriate records series and records retention schedule for each records series? How should e-mail records be organized for long-term storage and access (e.g., project, department, function)? How will we retrieve and dispose of e-mail on our chosen storage media?
- How should our e-mail retention strategy coordinate with our other records management procedures (e.g., store all project-related e-mail with the other project documentation)? What documentation do we need for our process?
- How should we implement the procedures technically and operationally? How can we plan our implementation so the policy is widely used and accepted, but causes minimal disruption to our daily operation?