Looking after your emails

THE CHURCH OF ENGLAND
RECORD CENTRE

Summary

This factsheet intends to provide guidance on how you can manage your emails. You will discover:

- Why it is important to manage your emails
- Guidance for approaching email management
- How to identify emails to keep or delete
- Options for storing emails

The guidance which follows is not prescriptive and should be adapted wherever necessary to meet local circumstances.

Introduction

The guidance below should be read in conjunction with the factsheet "Organising your records", which gives advice on setting up a filing structure for your records and "Looking after your electronic records".

You may hold your emails in a centrally managed email service administered by an in-house IT service or you may use any one of a number of freely available web-based email providers (e.g. hotmail, gmail). With this in mind, please note that this guidance is not specific to one particular email service, rather the guidance should be interpreted to meet your local requirements.

From here on the term 'mailbox' will be used to indicate all emails under an individual's control and will include the inbox, sent items and any other folders in use.

Why should you manage your emails?

It is important that you take care over regularly managing your mailbox and there are two key reasons for doing so.

Firstly, it is a **means to stop the development of an unmanageable mass of information**. Emails are used for varying purposes, ranging from work to personal, ephemeral to key work messages. This varied use poses a challenge for its continual management, not least because of the potential volume of emails held. A well organised and regularly assessed mailbox will aid retrieval of key information.

Secondly, it is a **method of identifying those emails which contain information of long-term value** for the future. It is important to base decisions on the management of emails by the information which they contain, rather than by the fact they are an email in format. Like other records created in the course of your work, emails must be understood as potentially valuable records not just for you personally, but for your colleagues and successors. By regularly assessing your mailbox you will be able to identify such information more easily.

Guidance for approaching email management

Emails for you to manage will be generated in one of two ways, either by yourself composing a new email to send out or by you receiving an email from someone else,

whether internally or externally. You can employ various tools and techniques to help impose order and control on your emails:

- **Take care when composing and replying to emails.** Poorly drafted emails make the process of managing them more difficult for both the sender and receiver. The first step should be to question if you actually need to send the email. Is there a more appropriate method of communication, could you pick up the phone or visit someone instead? If you do need to send it then make sure that you:

  - Use the subject line to introduce the topic of the email in a clear and unambiguous manner.
  - Limit the email to one topic. If a new subject needs to be discussed break the email chain and start a new one.
  - Always include the original email in any replies to ensure the complete email chain is available.
  - Only send attachments if really necessary. Consider if the information would be better in the body of the email, and if the document is stored on a shared file storage area you may be able to send a link instead.
  - Consider using available message settings, such as marking emails as high or low importance, to help the receiver with prioritising. Use this sparingly and do not mark all emails as important, to ensure impact is made when necessary.
  - Think before hitting 'reply all' if the message you're replying to has been received by multiple people. Ask yourself whether everyone needs your response or just the sender.
  - Remember that emails are open to scrutiny as other records are, and this would include disclosure of emails following a subject access request made under the Data Protection Act.
  - Be careful to ensure that you are sending the email to the correct recipient, especially if it contains sensitive information.

- **Use folders to clearly structure emails.** You can set up folders within your mailbox into which you can move emails from both your inbox and sent items folders rather than leaving all emails in either place. Well planned and organised folders can assist with the process of email management by providing a clear structure, allowing the grouping of emails with those of a similar type. Where necessary you should use subfolders to create a hierarchical structure to aid navigation if you have numerous emails covering the same subject area or activity (e.g. year folders, tasks for a project). If you already use a **filing structure** for your paper and electronic records you should consider using it as the basis for your email structure. As part of your structure it is advisable to have a folder into which you can move personal emails, to ensure these remain separate from work related messages.
- **Apply technical settings to assist with email management.** Be aware of what your email service can do to help with management, as a degree of automation can ease the strain. Setting up email rules is a useful way to ensure filing is regularly taken care of. For example, you can set up a rule to identify particular senders or keywords which will direct relevant emails to a specific folder. Email rules can also be a useful way of separating those emails which may not need immediate attention. For example, you could send all emails from a mailing list to an appropriate folder or do the same for emails you are only copied in to. These messages are often only for informational purposes and do not usually require immediate action.

- **Make time to regularly assess your mailbox.** If you are using a structure of folders then file emails into their allotted folder as soon as possible. Try to review your inbox and sent items folders daily, deleting ephemeral emails almost immediately and deleting duplicated emails in chains. If an email chain has not been edited and all the emails are part of the chain, you should keep the last one and delete all others. Remember that the complete chain may be in either your inbox or sent items. Try to set aside time at regular intervals to assess your emails more thoroughly and identify those for long-term value or which should be stored elsewhere. For example, this might be at the end of the week or month, or perhaps when a piece of work is completed. Consider adding a regular appointment to your calendar to spend time on this.

Deciding what emails to keep or delete

Whilst regularly reviewing your emails you will be deciding what information can be deleted and what should be retained. If kept, you will also be making a decision on where the email should be stored, possibly outside the email service (there is more detail on this in the next section). The essence of this decision-making process is that you are assigning a value to your emails based on the information they contain.

What follows is some brief guidance on identifying emails to keep or delete, but this is intended as a starting point to help make the decision. It should be looked at in conjunction with the retention advice given in separate factsheets for parishes, dioceses, bishops' offices and cathedrals.

Emails to be regularly deleted

Many emails hold a transitory value and are not candidates for long-term retention. They should be deleted regularly (e.g. once an action has taken place, a meeting has occurred, reference has ceased). Examples include:

- Meeting notices and arrangements
- All staff and team communications
- Convenience copies of emails held for reference
- Copies of reports and newsletters
- Informal discussions with colleagues not related to policy decisions
- Messages relating to a time limited action
- Incomplete and draft emails
- Emails which only contain an attachment and no content (the attachment should be saved outside the email service)
- Social and personal arrangements

When deleting emails you must make sure they are actually removed from your email service. Initially this will involve ensuring that your deleted items folder is regularly emptied. Most services can be set to do this automatically. But you must also consider emails as part of any back-up procedures in place. Advice on back-up procedures for electronic records is discussed in the factsheet "Looking after your electronic records".

Emails to be kept

Emails and attachments which form an important record of your work and have a long-term value should be managed alongside other official records and shared with

your colleagues, rather than being held independently. Such emails will initially be held within your mailbox, but they should be saved into a **shared filing structure** as soon as possible or at an appropriate point in a piece of work. Examples include:

- Proof of a decision made
- Explanation of actions taken
- Formal agreements
- Policy precedents

Emails to remain in your mailbox

There will be a further selection of emails that will not be deleted or saved outside of the email service. These will be emails you require to be left in your mailbox for a longer period of time, usually for their reference value. This is an acceptable approach as long as you are carefully weeding out those which need to be deleted or saved elsewhere as appropriate. It is still worth periodically reviewing these emails as their relevance and usefulness for reference may alter over time.

Storage of emails outside your mailbox

As noted above, if a decision is made that an email needs to be retained as a record of work it is important to manage it alongside other records to which it relates to ensure that the complete picture of a particular piece of work or transaction is available to colleagues as necessary. This is likely to mean one of these two options:

- Saving the email in an electronic format to a shared file storage area – in the same way as you would save a word processed document or spreadsheet
- Printing out the email and managing it in a paper filing system

For advice on steps you can take to help in the preservation of records see the factsheets "Looking after your paper records" and "Looking after your electronic records".

Formats to use when saving to file storage

When saving an email to a file storage area, you will need to decide what format it should be saved in. The next section discusses the issue of legal admissibility which could impact on your choice of format.

If you work with Microsoft Outlook, emails can be saved to a file storage area as an outlook message format. This will keep the email in its original format and allow the usual functionality of an email to remain (e.g. ability to open and reply). However, this takes up a lot of space and relies upon Outlook to be able to open the email.

You will not usually need to retain the full functionality of the email, rather it is the information you are concerned with retaining. To this end you should consider saving emails in a plain text or rich text format. Please note that with plain text you will loose any formatting in the email (e.g. colours, bold text) and attachments will not be able to be opened. It is advisable to save attachments separately. A text or rich text file will still show details of the sender, receiver and date sent. When you are saving an email outside your mailbox it is an opportunity to give the email a new title if necessary. The title must clearly indicate the contents of the file.

Remember if you do save an email outside of your mailbox you should delete the original from your mailbox to ensure there is no duplication.

Legal admissibility

Email is a form of documentary evidence and can be admitted to court in the same way as other forms of documentary evidence. That said, as with other forms of evidence, the reliability of email evidence will be subject to scrutiny. This can be a particular issue when it comes to email, since measures which may protect the integrity/authenticity of emails (such as digital signatures or some form of encryption) are not always used.

That said, you can take steps that can enhance the reliability of email as evidence. It is a good idea to demonstrate that email has been created, compiled and stored in accordance with good practice. In particular compliance with the BSI "Code of Practice for Legal Admissibility and Evidential Weight of Information stored Electronically" will be helpful. The Code provides a framework that can be used to assess the reliability of evidence stored electronically. Indeed, the Code gives a detailed working practice framework covering both technology requirements and business processes to ensure that an organisation can prove that the content of a particular email (or other electronic document) has not changed or been altered since it was archived. More information about the Code can be found on the BSI website:- http://shop.bsigroup.com/en/Browse-By-Subject/ICT/Legal-Admissibility/.

When deciding how to manage the emails which you need to retain as a record of your work, you must weigh up the consequences of losing the email in its original format. These consequences will be specific to your area of work. When saving an email it is always important to retain details of the sender and recipients. If, however, an email is likely to be required as evidence, perhaps in a legal dispute, no longer having the email in its original format may mean that its reliability (or even its admissibility) is subject to question. In order to assess your situation you may like to carry out a risk assessment, but it is also a matter you should discuss with your legal adviser.

Factsheets available in the records management toolkit

- What is records management
- Organising your records
- Looking after your paper records
- Looking after your electronic records
- Looking after your emails
- Looking after your multimedia records
- Agreements with record offices
- Access to records
- Data protection
- Copying and copyright
- Glossary

Further guidance

For further guidance please contact the Church of England Record Centre:

15 Galleywall Road, South Bermondsey, London, SE16 3PB.

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