



Tips for Managing Email

1. Purge email frequently

Determine what to destroy

- Communications that are not U of T records (spam, personal emails)
- **Copies** when no longer needed
- **Transitory** records may be deleted when no longer needed.
- Working papers (drafts, copies) when no longer needed.
- Remember to regularly delete the trash folder.

Determine which emails are transitory (see Appendix 1 for a transitory message workflow)

- Records that are required for a limited time to ensure the completion of a routine action or the preparation of a subsequent record.

Determine which emails are ‘University records’

- Messages that initiate, authorize, or complete a transaction.
- Copies containing more information than the original.
- Messages received from external sources that form part of the departmental record.
- Original messages of policies or directives.
- Where the information does not exist elsewhere:
 - Messages related to work schedules and assignments
 - Agenda and minutes of meetings
 - Briefing notes
 - Final reports and recommendations

2. Follow these practices for managing your inbox:

- If you are the creator of an email, ensure it is retained and filed. Do not forget to manage your ‘Sent’ folder.
- Set up a series of folders within your inbox that mimic your records classification system.
- File emails that are official records within your electronic records system, or print them and place them within your paper classification system. Remember, your inbox is a communication program, not a record keeping system.
- Focus on managing records created by, or originating from within your office. You must also manage email messages sent from an external source, where that information does not exist elsewhere in the University and forms part of your office’s records.



Appendix 1

Transitory email workflow

