Reviewing your emails (GUIDANCE FOR ALL STAFF)

1. Identify what emails to keep:
   - What kind of emails are they?
   - Use the retention schedule to see how long to keep business emails
   - Don't forget to check sent items

2. Think about where they're stored:
   - Don't just rely on the inbox
   - Think about where you should file emails
   - Limit your number of inbox folders

3. Review your email inbox:
   - Set aside time
   - Aim for a ‘read’ inbox
   - Develop rules to sort emails
   - Use email folders as temporary storage

1. Identify what emails to keep:
   - Emails generally fall into 3 categories:
     - Routine transitory/informational emails
     - Time limited business emails
     - Emails that can be immediately deleted.
   - The vast majority of emails do not need to be retained indefinitely.
   - The content of the email determines how long it is kept. Staff should consult the University records retention schedule to determine this.
   - Don't ignore sent emails – these will usually provide evidence of actions/decisions that have been taken.
   - Don’t assume that just because an email is old it does not need retaining. Make sure you examine the content of the email first.
   - Identify transitory emails which are typically only required for a limited time and are often used to support a routine action or to prepare a subsequent record. These can usually be deleted.

2. Think about where they’re stored:
   - Don’t just store emails in your inbox. This limits access to emails which might be needed elsewhere for information or for evidence of University business.
   - Make sure any emails that document University business are filed into the appropriate recordkeeping systems (e.g. X:Drive, case management systems etc.)
   - Create a limited number of folders within your inbox to support that filing process (e.g. ‘Staff > Supervision emails’ which might be later filed on an employee file).
3. Review your email inbox:

**Set aside time**

- Allocate specific time to review the content of your inbox. This will enable you to keep on top of the volume of emails before they become too unmanageable.
- When reviewing the emails in your inbox/sent items decide on a methodology to use – consider using the ‘sort’ functionality to group emails by subject, dates, or recipients/senders and then begin reviewing. This can allow you to action some emails in bulk, such as those generated by systems (i.e. SAP).

**Aim for a 'read' inbox**

- Aim for an inbox where all items are at least opened/read to enable you to prioritise their management.
- An inbox with hundreds of unread items will become very difficult to review and manage.
- Marking items as 'unread' that require further actions/management (such as filing elsewhere) can make the management of emails more effective and efficient.

**Develop rules for your emails**

- Consider the use of email rules to move emails from your main inbox to other inbox folders if they are purely sent/received for reference purposes.
- This can also be useful if you are part of a distribution list where you are routinely copied in for information only.

**Email folders as temporary storage**

- If you don't have time to save your emails elsewhere in the course of your day then move these to an inbox folder titled 'To be Filed' and work your way through these when you have some spare time.
- If you will need to re-organise your emails when you are saving them to another location such as the X:Drive but do not have the time to immediately organise these then create a temporary folder on that drive to move your emails to initially, and then re-visit these at a later date.
The difference between business emails and transitory emails

<table>
<thead>
<tr>
<th>Business emails</th>
<th>Transitory Emails</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reflecting the position of the University</td>
<td>Messages which are duplicate copies of information for reference purposes</td>
</tr>
<tr>
<td>Authorising or completing an action</td>
<td>Informal messages not required as evidence</td>
</tr>
<tr>
<td>Emails from external sources that form an official record</td>
<td>Rough drafts not required as evidence</td>
</tr>
<tr>
<td>Emails that form policies or directives</td>
<td>General emails to all staff re. holidays etc.</td>
</tr>
<tr>
<td>Emails relating to work schedules or assignments</td>
<td>Messages received from distribution lists</td>
</tr>
<tr>
<td>Briefing notes or associated reports</td>
<td>Personal emails</td>
</tr>
</tbody>
</table>

Further information:

- If you need further information or have questions about recordkeeping issues please email the Records Management Service on dj11@le.ac.uk or see our records management pages which are available at: https://www2.le.ac.uk/offices/ias/records
- Further guidance on preparing for the General Data Protection Regulations is available at: https://www.le.ac.uk/gdpr