

Email: to save or not to save?

E-mail: What to read and delete...

Do you ever wonder if you should keep or delete that e-mail message that you've just read? Sometimes the answer is clear and other times it's as clear as mud. The result of this uncertainty is that we often save and file more e-mail than is necessary. This practice takes up valuable server space and makes it difficult to locate important messages quickly when you need them.

What is worse, however, is finding out that you've deleted a message that you should have retained as the official record of a transaction or decision.

In order to manage your e-mail properly, you need to know the difference between an official government record that should be filed and retained according to an approved records retention schedule, and a "transitory" record which can be deleted as soon as you no longer need it.

What is an e-mail record?

Messages that document County functions, provide evidence of County business transactions, or are needed to provide information about actions related to County projects and activities are government records and must be retained and managed in compliance with County records retention schedules and State recordkeeping requirements.

What is a transitory e-mail record?

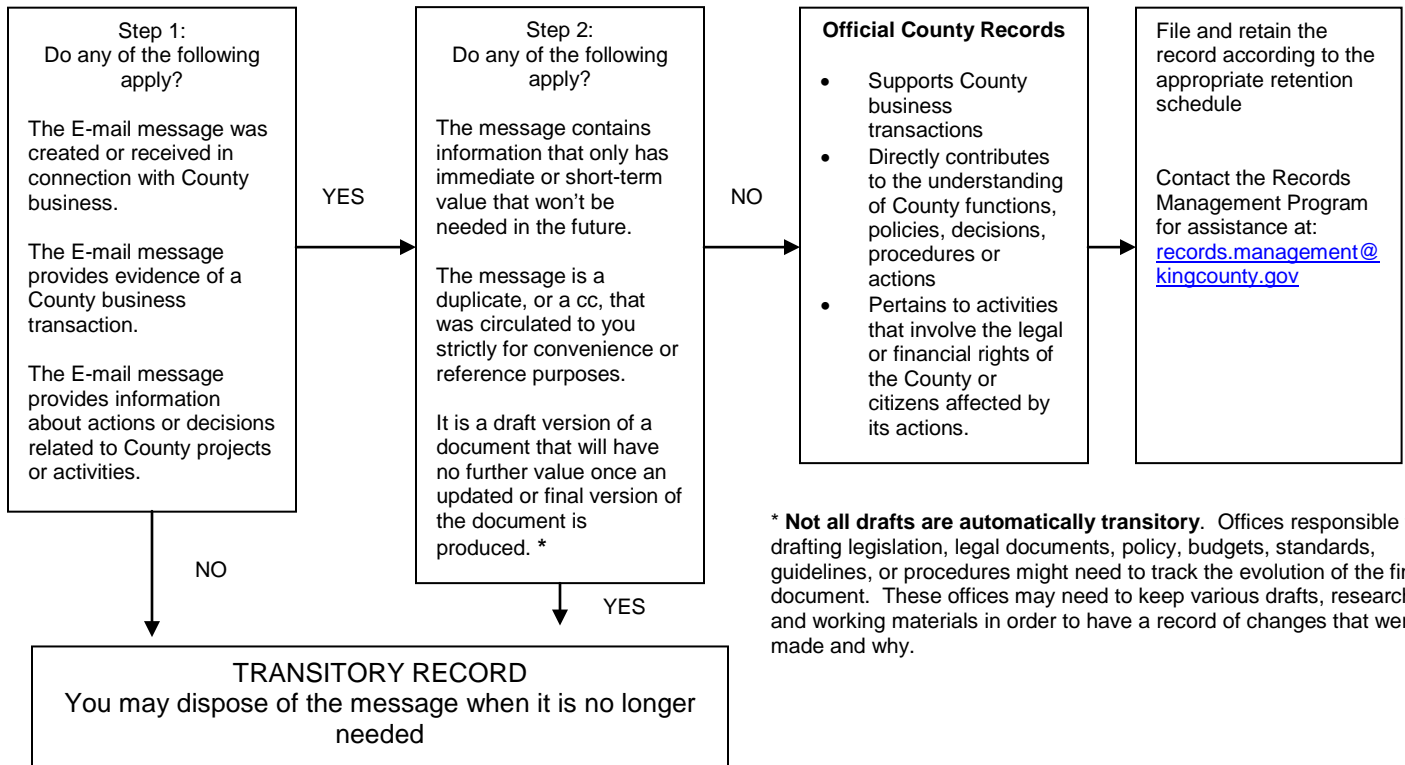
Transitory records are records that are required for only a short period of time to facilitate the completion of a routine action or the preparation of a subsequent record. Transitory records are not required to meet legal obligations, or to document the decisions or actions of your office.

Below are some examples of transitory records that you can discard as soon as you no longer need them, or see the examples to the right:

- **Miscellaneous notices or memoranda**, such as broadcast e-mail notices of holidays or special events, minor information items concerning routine administrative matters or other issues not directly pertaining to the functions of your office
- **Informational copies** of widely distributed materials that you/your office is not the creator or sponsor of such as meeting minutes, agendas, or newsletters
- **Preliminary drafts** of letters, memoranda, or reports and other informal notes which do not document substantive changes in the preparation of a final document
- **Duplicate copies** of documents that are retained only for convenience or future distribution
- **Personal messages** such as "want to meet for lunch?" or phone messages such as "please return Robert's phone call"
- **Publications** such as informational newsletters, catalogues, and pamphlets received from outside sources
- **Unsolicited advertising materials** company brochures, price lists, menus, etc.



Diagram: What is a transitory record?



Email Stoplight

A tool to help you organize your email

Stop and Save (RED):

** **Stop and Save:** Email documenting substantive business such as decisions, directions requiring action, proof that you took action, documentation of transactions, requests or complaints, project details should be saved per the retention schedule

Yield (YELLOW):

** Email with short term business use that may or may not become part of a larger body of work. These messages have retention value as General Correspondence, but may escalate or require additional work and be moved to a more specific folder/project.

Go Ahead and Delete (GREEN):

** Thank you responses, messages from friends or family, unsolicited advertisements, news updates, broadcast messages should be deleted immediately after use. These are Transitory Records.