Office of the Information and
Privacy Commissioner of Alberta

8 Tips for Managing Emails

Email has become one of the main forms of business communication. Business decisions, key communications and important information are regularly shared by email. Yet, people often do not think of emails as records or they view emails as having short term or no business value and therefore not required to be kept. These tips are derived from the Office of the Information and Privacy Commissioner's "Guidelines for Managing Emails", which is available at www.oipc.ab.ca.

1. The Complete Story

It is critical to retain emails that are official records to ensure that the organization's records capture the "complete story".

4. Move Official Record Emails from Mailboxes

Move official record emails from your email mailboxes as soon as possible to ensure that they are not inadvertently deleted and employees "with a need to know" have appropriate access to them.

7. Training and Education Are Essential

Train staff in the organization's records management and email management policies and procedures and ensure they understand where official record emails are to be saved.

2. Keep Personal Messages Separate

Don't include personal messages in business emails as they will become part of the official record retained in the corporate records management system.

5. Limit Duplication

There is no need for every staff member who receives an important email to save it to the records management system. There should be a shared understanding of who is responsible for retaining the official records of a project or file.

3. Use Descriptive Subject Lines

Include a subject line that appropriately describes the content of the email. This assists in relating the emails to associated records, whether electronic or paper.

6. Delete Transitory Emails Regularly

Transitory emails should be deleted once they are no longer needed. When deleting emails, remember to empty the Deleted Items Folder.

8. Review Compliance

Do follow-up monitoring to ensure staff are complying with the established policies and procedures.

www.oipc.ab.ca

March 2019