

Email Guidance – How to reduce email archives and inbox sizes

Identifying emails worth preserving

Very few emails need retaining for any period longer than 6 months and a small fraction need retained more than 2 years. Questions you need to ask yourself with the emails in your inbox and archive:

- Is an email an integral part of a transaction, formal agreement, business decision or notice of receipt or completion?
- Are you the sender of such an email?
- Are you the main recipient of such an email (e.g. To: rather than CC:)?
- Did you respond to the email?

If you can answer 'No' to most these questions for an email, you should delete it if it is older than 6 months.

If you can answer 'Yes' to most of these questions for an email, you should refer to the [Corporate Retention Schedules](#) for guidance on how long to retain it for. Note that there is no single retention rule for 'email', instead the retention is based on the activity or subject of each email.

The decision chart at the end of this guidance summarises the questions you should be asking when reviewing your email.

Emails can be retained for reference purposes for as long as they are current and useful but these should be kept outside Outlook if they are going to be kept longer than 6 months.

How to review an email inbox or archive

Whilst the above questions and below decision chart are useful to identify and challenge email retention on an individual message basis, most inboxes and archives have hundreds or thousands of emails in them that can take too much time to review individually without some more basic whittling down of numbers first. What you need then is a series of filters that can quickly identify emails into groups that you can make retention decisions on en masse, without looking at each one individually.

Outlook offers many different ways to sort your email and you can use these views to group them and make retention decisions on. Here are a number of suggestions:

- **Sort it by Size** – consider deleting small emails (under 10k); consider saving large emails (1MB+), and their attachments, to the G Drive
- **Sort it by From / To** – are there some people's emails you can delete more easily than others? Do some people only equate to a specific project that you can save their emails into a project folder? Do you need to keep those which are only CC'ed to you?

- **Sort it by Subject** – some subjects will be less important than others; some will refer to specific projects or tasks that could be saved to the G: or H: Drive
- **Sort it by Conversation** (View – Arrange By – Conversation) – consider retaining only the last email of a conversation if it contains the previous emails in its text

Don't forget that you will need to do this for each folder within your Inbox or Archive.

Where to keep your email

Like all file types, emails fall into three broad categories – Trivial, Reference or Record.

- **Trivial** you delete as soon you have read it and manage solely within Outlook
- **Reference** you keep for as long as it is immediately useful, making a judgement call on whether to retain in Outlook or transfer to the G: Drive
- **Record** you keep until the Council no longer needs it for evidence (as guided by the Council's Corporate Retention Schedules), transferring it to the G: or H Drives once the work / transaction is finished or the decision / agreement made

You can move emails out of an Outlook archive by dragging them into your inbox or straight out of Outlook into a relevant folder on the network - where they will have better long term access and backup. H: Drives should only be used for emails relating to staff management or business related personal correspondence (e.g. networking, professional / union advice) – everything else should be retained on the G: Drive.

Once dragged out of Outlook you can delete the original and still access the newly created file on the network – with any attachments retained within. Transferred emails will be automatically given their subject lines for their filename but you should consider renaming them with the relevant sender, recipient, sending/receipt date in addition to the subject line. This reduces the chance of different transferred emails, with the same subject line and filename, copying over each other. It is also good practice to contain core information within a filename to save confusion over an email's content.

How to keep on top of your emails

You will need to manage the content and size of your email inbox from now on. Routine revisiting of the above review process will help but you should also read and incorporate the [Managing Email Fact Sheet](#) from the Council's Records Management Toolkit into your email admin practices.

Good practice is to review your inbox and archive weekly or monthly in order to keep on top of the number of emails – the more routine the review, the easier it becomes to perform. Best practice is to not to use an email archive at all.

Further Information

For further information on records management best practices, procedures and requirements you should contact the Council's Records Management Team (RecordsManagement@edinburgh.gov.uk | Ext. 46170).

Document Control

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Email Retention Decision Tree

