RIM

Recorded Information Management

Electronic Records: What About E-mail?

Information technology has advanced so quickly that it often leaves us unprepared to cope with the issues it raises.

One such issue is the retention and disposal of electronic mail... deciding what to keep and what to discard... and how to do it.

Tips for E-mail Effectiveness

When sending...

- Be concise. Avoid the temptation to send long, rambling messages, and don't use e-mail as an excuse for not editing.

- Send copies of e-mail messages only to those who really need to read them.

- When you answer a message, send the original back with your reply.

- Make sure you're sending your message to the right person... check your address lists regularly.

- Be careful when sending confidential messages.

E-mail is a relatively new kind of electronic record. Tailor-made for fast questions and responses, for setting up appointments and for conducting daily business, e-mail is rapidly replacing the phone call and memo as the office communications tool of choice.

But e-mail messages often multiply at an alarming rate, congesting computer systems and reducing efficiency.

And there's a bigger problem... what about when e-mail is used to develop policies and administer program delivery? Or when it documents consultations or critical decisions? In these cases, e-mail is often the only record of important ministry business. Many e-mails meet the definition of "recorded information" which is subject to Directive 7-5. This means that these e-mails can't be destroyed without proper approval. Talk to your ministry records management staff for further information.

An e-mail message constitutes an official record when the document is made or received in connection with the transaction of government business.
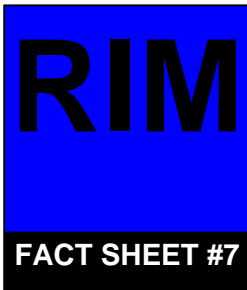
For instance:

- when it records official decisions

- when it records or communicates discussion about policies, programs and program delivery

- when it contains background information used to develop other government documents, such as studies, reports, and position papers

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OK, so what can you delete without worry?

- Personal messages ("Lets meet for lunch," etc.)

- Extra copies of documents kept for convenience in your e-mail storage

- Communications about routine office administration activities ("I'll be away tomorrow," "Please book the board room," etc.)

If you're not sure: the best advice is to start with the assumption that a particular message is a record. Because e-mail is such a flexible information communications tool, users may be tempted to start with the opposite assumption, deleting haphazardly. But that's how many important documents are lost.

Program managers should be sure that employees understand their responsibilities when using e-mail and all are familiar with record keeping requirements.

Here are some generic recommendations for saving e-mail documents:

Decide how they should be saved.
Remember that electronic systems are more easily searched than paper files. So you should save important e-mails electronically if possible. Most systems allow you to do this; many let you save to a particular file or directory.

If your system allows long-term storage on paper only, print out copies and store then in an appropriate manual filing system. Ensure that the information identifying senders, receivers and data/time of transmission is printed and stored together with the e-mails to which they relate. (This protects the full value of the e-mail as a record.)

Don't rely on e-mail system backup tapes for storage.
Backup tapes are not meant for regular use, but rather to meet special circumstances, such as an emergency or accidental erasure of a file. Individual messages are

Usually very difficult to find on back-up tapes. Make a habit of saving e-mails electronically to folders, including e-mail messages you are transmitting. But periodically delete unimportant messages.

When you change e-mail software in your office or ministry, make sure you convert saved e-mails to the new system.
If the new system doesn't allow this, find out how to save your e-mails in a universal format such as ASCII, or print and file them. (This is something you need to do with any electronic text when a new system doesn't allow conversion.)

Remember...

RIM applies to all records, including those that are produced electronically. Unless you and your staff take steps to manage these records carefully, they won't be available when you and others need them.