



Records Management Bulletin

Records management advice prepared for GNWT employees
by the Records Management Unit of Public Works and Services

No. 43 – September 2005

The Guidelines for Managing Electronic Mail Messages

In last month's Bulletin we told you about the new Management of Electronic Information Policy. This month we will look at the **Guidelines for Managing Electronic Mail Messages**.

The Guidelines

The Informatics Policy Committee approved the guidelines in May 2005. The guidelines are designed to help you implement the Management of Electronic Information Policy. They focus on one type of electronic record: e-mail messages.

A lot of government business is done through e-mail messages. Given a choice, many people will send an e-mail message instead of making a phone call. E-mail messages are easy to send, easy to copy to many people, and provide a record of your "conversation" with someone else. They also tend to build up in our e-mail inboxes and sent items folders. This makes it hard to find a message when you need it.

E-mail is here to stay. The guidelines will help you use it effectively. You can find them on the Public Works and Services website: <http://www.pws.gov.nt.ca/records/policies.htm>.

Creating e-mail messages

There are times when it is a good idea to use e-mail, and times when e-mail messages should be avoided. Use e-mail messages to:

- Send information to a government distribution list.
- Share information, draft documents, reports, agendas, and minutes within work groups or committees.
- Replace phone calls, particularly long-distance calls.
- Set up meetings, appointments, and work schedules.
- Action informal approval processes.

Do not use e-mail messages to:

- Say anything that you would not put in a letter, a memorandum, or say to a person face-to-face.
- Send abusive, racist, sexist, or sexually explicit messages or attachments.
- Send or forward junk mail, chain mail, or unsolicited material.
- Send personal or confidential information.

Your e-mail messages could be used as evidence in a legal dispute. It could also be requested in an Access to Information request. Do not send an e-mail message if you are not prepared to see it used in court or released in an Access request. Also remember that the E-mail Administrator may need to access your e-mail messages to fix problems, provide a message to your supervisor when you are away, or respond to an investigation or ATIPP request.

Your responsibilities

Yes, it is true. If you are reading this, then you have a responsibility to manage e-mail messages. Talk to your records coordinator to help you figure out what you need to do.

All employees are responsible for:

- Regularly separating their substantive and transitory e-mail messages.
- Deleting their transitory e-mail messages. Do not delete records about government business.
- Moving their substantive e-mail messages into their departments' administrative and operational records classification systems (ARCS and ORCS). One way to do this is to set up your Outlook folders so that they match ARCS and ORCS. Departments that use iRIMS may use the filing bin for this.

There is a list of the types of e-mail messages that you should keep in **Section 4.1** of the guidelines. If you are still not sure what to keep, remember that you are better off keeping a record than deleting it.

Managers and supervisors are responsible for:

- Making sure that employees understand their responsibilities.
- Making sure that employees follow policies, guidelines, and procedures for e-mail.

For more information, contact your department's records coordinator, or contact the Records Management Unit at 920-3009 or 873-7446

Keeping e-mail messages

You might be wondering if you have to keep every e-mail message that you send and receive. The guidelines have instructions that cover the usual situations. These instructions apply to substantive records.

- Keep the message if you were the person who sent it, and a complete set of responses.
- Keep the message if you are the only person in your department who received it.
- If multiple people in your department received the same message, only one of you needs to keep the message.

You do not have to keep the message if:

- The record was received as a mass distribution from the Postmaster or other GNWT distribution lists.
- You responded to an e-mail message and someone else in your department is responsible for keeping a complete record.
- You received reference information from a non-government source that is not required for government business.

Speak to your records coordinator if you have any questions about what to keep.

Filing e-mail messages

You might be wondering when you should file an e-mail message. The guidelines cover that, too. File an e-mail message:

- When all actions related to that e-mail have ended.
- When there is a need to share it with co-workers.
- When the e-mail conversation has ended.

E-mail messages have the same retention periods as records in other formats. Your records coordinator will help you keep them as long as you would keep other records classified in ARCS and ORCS.

For more information, contact your department's records coordinator, or contact the Records Management Unit at 920-3009 or 873-7446