

Email: To Save or Not to Save?



Email: What to Save and Delete...

Do you ever wonder if you should keep or delete that email 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 more email than is necessary. This practice takes up valuable 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 email properly, you need to know the difference between a city record that should be 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 a City email record?

Messages that document City functions, provide evidence of City business transactions, or are needed to provide information about actions related to City projects and activities are city records and must be retained and managed in compliance with City records retention schedules and State recordkeeping requirements. These are often referred to as having substantive value.

See the City Records Management Program's Inweb site for additional information related to records retention: <http://inweb/clerk/RecordsManagement/default.htm>

What is a transitory email record?

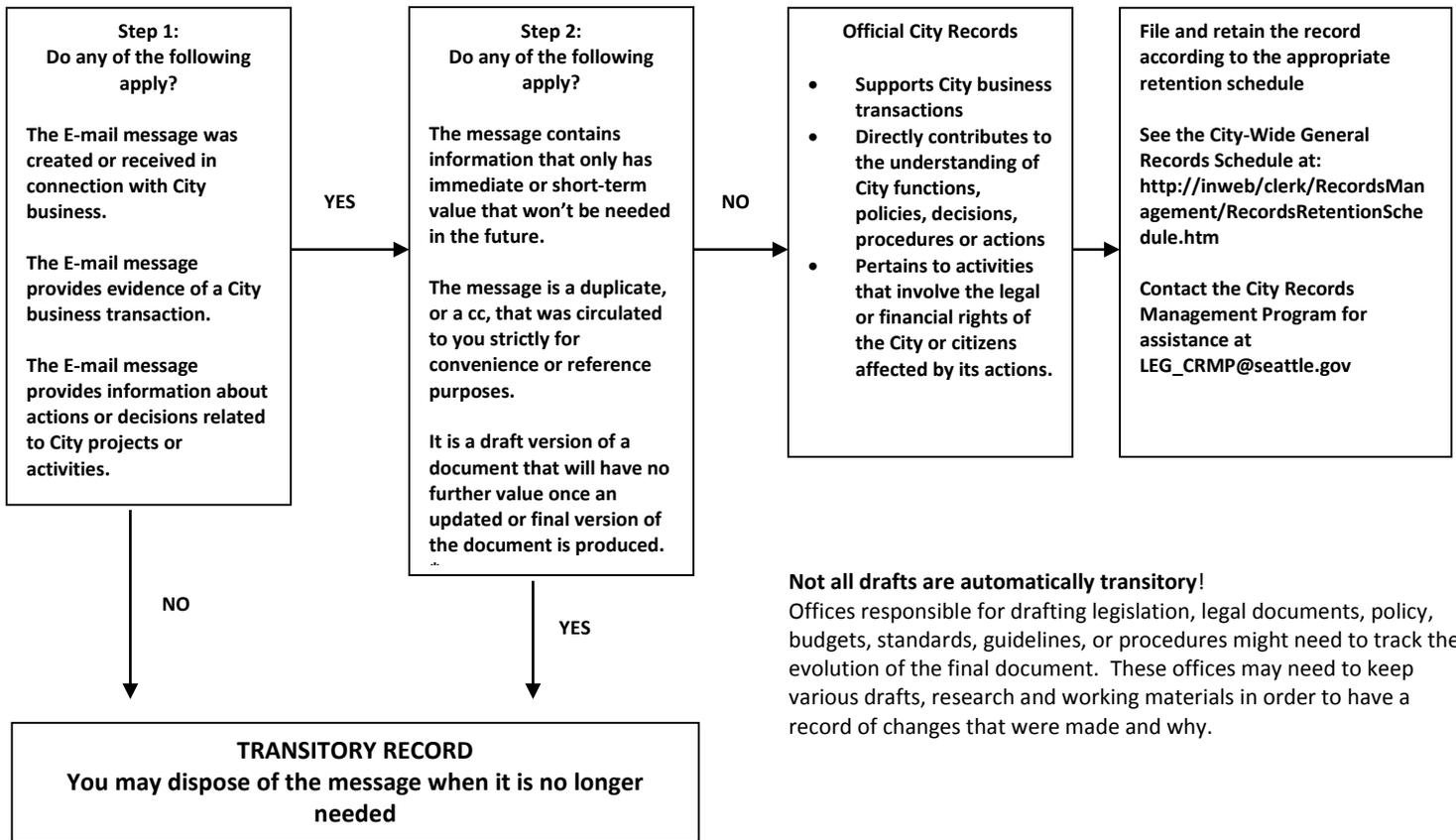
Transitory records are records that are required for only a short period of time to facilitate the completion of a routine action or the preparation of a subsequent record. Transitory records are not required to meet legal obligations, or to document the decisions or actions of your office.

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 email 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?



Not all drafts are automatically transitory!

Offices responsible for drafting legislation, legal documents, policy, budgets, standards, guidelines, or procedures might need to track the evolution of the final document. These offices may need to keep various drafts, research and working materials in order to have a record of changes that were made and why.