

E-Mail: Best Practices and Helpful Tips

American Catholic History Research Center and University Archives

What to Keep

- Messages, including attachments, in their original format that document the day to day functions and provide evidence of decisions, actions, or policies should be retained.
- Messages should be saved which document decision-making, or committee activities, and may have historical value and may warrant transfer to the archives in the future.

What to Delete

- Routinely delete messages in your trash folder, messages relating to personal plans, messages with short term value, and messages distributed to a large number of staff for information only, such as a news bulletin or listserv.
- Review your inbox, sent box, and folders for messages that are no longer needed and can be deleted.

Organizing Messages

- Storing messages, including attachments, in your inbox and folders requires daily deletion of unnecessary items, moving items to folders, and reviewing folders periodically to remove unneeded messages.
- When creating topical or subject folders, think of using a topical or subject related filing system which mirrors the paper filing system used in your office, and pick folder names that accurately describe the items within those folders.
- Consider using subjects with dates, topics with years, and/or personal names as folder titles.
- Try creating folder titles that can be interpreted by others, if they needed to, so avoid using acronyms or abbreviations when possible
- Be as descriptive as possible when creating folder titles, using full names or combining subject with a date/year

Sending Messages

- Use subject lines that are indicative of the content of your message and that the person who receives the email can use to retrieve it.
- Use work email systems sparingly to send or receive personal email. Use discretion when mixing personal and work-related messages.
- Take time to compose a thoughtful response before sending an email. Proofread your email for spelling errors, grammar, and punctuation before sending it.
- Do not put anything in an email message that you would not want to see printed in tomorrow's newspaper or displayed on a bulletin board.

Helpful Tip #1

As you read each message make a decision about it:

- Delete it
- Act upon or respond
- Forward
- File in a folder
- Leave in inbox for future action

Helpful Tip #2

• Some people find that they can manage their inbox better if they set aside a specified time each day or week to review their messages, and delete and file them. Friday afternoons can be a good time to weed unnecessary messages from your inbox, sent box, trash folder, and other folders.

Summary

• Messages documenting day to day functions or which provide evidence of decisions, actions, or policies should be retained.

Messages relating to personal plans, or having short term value, or messages distributed to a large number of staff for information only, such as news bulletin or listserv should be routinely deleted.

• Periodically review and delete messages in your inbox, sent folder, and topical or subject folders.

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