

Managing email – transcript

Explanation

This transcript is a record of the **words spoken** in the YouTube video: *Managing email*. The words may differ from what is seen in the video. Some of the words on the screen are included in square brackets below.

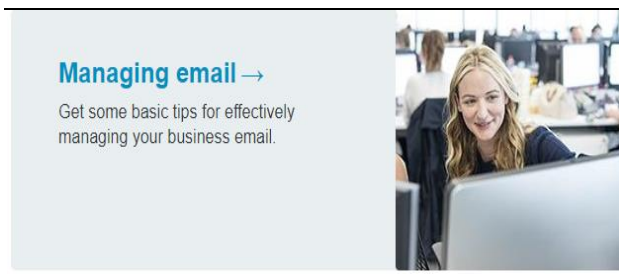
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Welcome to Managing Email. A short module from the National Archives of Australia. This short video will show you the basics of managing email effectively and will help you to understand the value of email to your agency's business. Decide which email you need to keep. Decide which email can be deleted. Correctly save and title email and use email as reliable evidence of decisions and approvals.

We use email to share information, make decisions and approvals and arrange meetings and appointments. But we often don't think of the value of individual emails we send and receive.

Email provides important evidence of decisions or actions which have been taken, documents advice and gives context to various aspects of your agency's business.

Under the Archives Act 1983, email relating to your agency's business must be kept and managed according to its value and should not be deleted without following your agency's policy and procedures.

[-Alert- Inbox Full]

Email relating to your agency's business should be saved in an approved location such as your agency's EDRMS Records Management System or case management system.

[Electronic Document Records Management System]

Regularly capturing email relating to your agency's business will help ensure the information and documents remains available for you, your colleagues and your agency in the future.

How do you know which email to save and which to delete?

As with all information, email should be managed based on its value to your agency's business and consistent with your agency's policies and procedures.

To decide whether to save or delete an email, ask yourself:

- Does the email relate to my work or my agency's business?
- Does it provide approval for an action?
- Does it provide advice or give a direction?
- Does it relate to something which records a decision or needs further action?
- Is this information likely to be needed in the future or likely to have any other benefit to my agency's business or the community?

If you answered yes to any of these questions you should consider saving the email in your agency's Records Management system or other approved location. Once you have saved the email you can delete it from your inbox.

If you're unsure whether an email should be kept check your agency's information and records management policies and procedures or ask someone from your information and records management area.

Of course some email won't necessarily be valuable to your organisation and may not need to be kept.

[Unimportant Emails]

This often includes:

- Messages received for information only.
- Trivial information such as meeting reminders and room bookings.
- Copies of information already in a Records Management system.
- Copies of documents for reference purposes only.
- General notices to staff; and
- Personal and social messages.

These emails can often be simply deleted from your inbox once you've decided they have no business use.

If you're unsure which email can be deleted, check your agency's information and records management policies and procedures or ask someone from your information and records management area.

When you are saving email you need to make sure it has a title or name that will make it easy to find later.

[NAA001 eLearning quote Swain to Karl 2015 09 01]

Titles should be meaningful, consistent and unique. Please see the National Archives' video 'What's In A Name' for further titling advice.

When you create and send email, follow these titling guidelines for your subject headings and you won't need to enter a new name or title when saving the email later on.

[Identifying Feature Summary of Subject Author and Recipient Date Information]

Email can be used to authorise decisions or actions within your agency often replacing the need for traditional 'wet' signatures. This reduces the need to print and manage records in paper format saving you and your agency time and money.

There are many benefits for recording business decisions and approvals digitally. Digital information takes up far less space and is easier to access, share, review and check.

There is often more detail available within digital formats than in a paper equivalent providing more context and validity for decisions recorded digitally. Email can be relied upon as evidence in court proceedings and other forms of enquiry, provided it is accountably managed in accordance with your agency's records management policies and procedures. This is supported by the Electronic Transactions and Commonwealth Evidence acts.

If you would like to implement a digital authorisation process within your agency, you should ask your agency's ICT security, and records and information management areas to ensure that the process takes into account your agency's policies and procedures, as well as relevant legislation and standards.

In summary, email relating to your agency's business must be kept and managed according to its value and should not be deleted without following your agency's policy and procedures. Business email should be saved in your agency's Records Management system or approved location and be titled meaningfully so it can be found easily by others.