

# McGill University Archives

## Recordkeeping and Email Best Practices

**EMAIL** is considered an official McGill record, and is subject to the *McGill University Records Retention Schedule (MURRS)*. Email consists of communications and related file attachments, including message metadata such as author, transmission and receipt data.

### **A McGill record refers to:**

All records created and/or accumulated by the University or affiliated bodies, including but not limited to faculties, departments, institutes, schools, and centers of research or services; and all records created and/or accumulated by all persons employed by the University in the performance of their duties as University officials, professors, or administrative and support employees.

### **Responsibilities:**

Records shall not be removed or destroyed without the joint approval of the University Archivist, as signatory of *MURRS*, and the heads of academic or administrative units responsible for the creation and/or accumulation of such records.

McGill employees have a duty to ensure the security and management of records while in their care, and to comply with the policies and procedures of the University Archives, including the management and transfer of records to the University Archives in accordance with *MURRS*.

## Some best practices for managing email

### **What can be deleted:**

- **Communications that are not McGill records, such as**
  - personal email
  - lunch arrangements with friend
  - spam
  - unsolicited ads
  - announcements
- **Working papers (drafts, copies) when no longer needed, such as**
  - draft versions of documents and related emails once the final version of the document is communicated
  - email forwarded to you for information
  - email that has been printed out and placed in a paper filing system

## Recommendations to help you with responsible management of your email:

- Consider using a classification plan. Create a common folder structure for your email and documents on the network.
- Place personal email in a folder labeled “Personal” and delete on a monthly basis.
- Delete items from your “Deleted” folder on a monthly basis.
- Do not strip out document attachments from the email message – this diminishes the authenticity of the mail as it is related to your action.
- Rather than emailing attachments, keep documents to be circulated internally on a shared network drive (i.e. F drive) and only include a drive and directory location for this document in your email.

A comprehensive document management system is being planned for the future. It will provide a recordkeeping solution that integrates *MURRS*. The recommendations in this document are intended to help email users with responsible recordkeeping in the interim.

## McGill University Archives resource contacts:

Senior Archivist, Records Management ext. 2955  
University Archivist ext. 2170

