



Town of Burlington  
29 Center Street  
Burlington, MA 01803

*Office of the Town Clerk, Archives Division*

Phone 781.270.1604/1660  
Fax 781.270.1608  
[www.burlington.org/archives](http://www.burlington.org/archives)  
[archives@burlmass.org](mailto:archives@burlmass.org)

Jane L. Chew, CMC, Town Clerk  
Eleanor M. Gelinias, CMC, Asst. Town Clerk

Lisa A. Plato, CA  
Archivist/Records Manager

## Records Management Guide #6 Short Guide to E-Mail Management

This document is an abbreviated guide to *Records Management Guide #2: Email Management* (available at <http://208.58.133.9/clerk/archives/pubs/archives/rmguide2.pdf>). For more information, see *Records Management Guide #2*.

### How Long Do I Have to Keep Email?

Just like any other record, it depends on the information in the record. There are four categories of correspondence:<sup>1</sup>

<i>Series</i>	<i>Description</i>	<i>Keep For</i>
Courtesy copies	Correspondence copied to the recipient for informational purposes i.e., "cc'ed"	Delete after no longer required
Non-permanent	Correspondence that <i>does not</i> document the development of policies, rules, decisions, major acquisitions or programs.	2 years after the end of the calendar year. May be printed and filed separately from permanent correspondence or retained electronically; see the section, <i>So, How Do I Manage Email?</i>
Permanent/Archival	Correspondence that documents the development of policies, rules, decisions, major acquisitions or programs.	Permanent. Print within 3 months of receipt and file in accordance with the office's regular business practice.
Unsolicited and unrelated to public business	Unsolicited advertisements, circulars, general mailings, and other unsolicited correspondence not related to the conduct of public business, including professional listservs and mailing lists	Delete after no longer required.

### What If I Want to Use Email for Personal Purposes?

Personal information is best left to a personal account; see the *Records Management Guide #2* for appropriate use guidelines. Free accounts are readily available on sites such as [www.yahoo.com](http://www.yahoo.com) and [www.hotmail.com](http://www.hotmail.com). These accounts are accessible via the Internet and are accessible from anywhere in the world with Internet access.

### So, How Do I Manage Email?

Email should be managed and retained according to the same guidelines as correspondence: 2 years after the end of the calendar year, unless the information has long-term value e.g., correspondence that documents the development of policies, rules, decisions, major acquisitions, or programs. If correspondence documents the development of policies,

<sup>1</sup> Per Record Schedule #23 Administration and Personnel (Records Held in Common, Local Version Revised 1/8/2001)

rules, decisions, major acquisitions, or programs, it should be retained permanently. Follow these guidelines for managing email:

1. Your email account should be set to retain the sender's message and to save messages to the Sent Mail folder; see directions below, *Recommended System Settings for Your Town Email*. This way, you can retain email in the Sent Mail folder and delete the incoming message in your In Box.
2. *If email has long-term value* i.e., archival or permanent, print it and save it in the paper-based record keeping system in accordance with the office's regular business practices.
3. *If email does not have long-term value* i.e., it needs to be retained for up to 2 years after the end of the calendar year, there are two options:
  - Print within 3 months of receipt and file in accordance with the office's regular business practices.
  - Export within 3 months of receipt. In order to expedite email management and to conserve paper, we recommend exporting email and retaining it electronically:
    - A. Every couple months, go to your Sent Mail folder and export non-permanent email. To do this:
      - i. Click on Sent Items on the left-hand side of the screen.
      - ii. Click on the Sent button on the upper right-hand side of the screen. This will sort the mail in chronological order.
      - iii. Scroll to the top of the month you want to export, click on the first item, hold the shift key, scroll to the bottom of the month you wish to export—this will highlight all of the messages for that month.
      - iv. Go to the menu bar to File and Save As. Select Text Only in the bottom menu; this should be the only option.
      - v. Name the file with the last two characters of the year and an abbreviation of the month. For instance: 01May or 01Nov. We suggest saving the file to your network drive: corr\email\2001.
      - vi. Highlight the exported messages as noted in step iii and hit the Delete key.
      - vii. Retain the email for two years after the end of the calendar year. For instance, delete the email for January-December 1999 on January 1, 2002.

***If exporting is not an option, contact MIS to install this feature.***

If you are not on the town email system, print and manage email as you would paper correspondence.

### **Recommended System Settings for Your Town Email**

1. Open Microsoft Outlook.
2. Go to the menu bar to Tools and select Options.
3. Click the Other tab.
4. Under General, check the box Empty the Deleted Items Folder Upon Exiting.
5. Click the Apply button.
6. Click Okay.
7. Open Microsoft Outlook.
8. Go to the menu bar to Tools and select Options.
9. Click the AutoArchive button and uncheck the AutoArchive box.
10. Click Okay and click Okay again.
11. Click Mail Format and under Message Format, pull down the menu to read Rich Text Format.
12. Click Apply and Click Okay.
13. Click the Preferences tab.
14. Click the Email Options button.
15. Under Message Handling, check the box "Save copies of messages in Sent Items folder. Use the default settings for the other features.
16. Click Okay and click Okay again.

***Do Not Use the AutoArchive feature, which puts the information in a proprietary format. Instead follow the directions listed under "So, How Do I Manage Email?"***