**Where to start?** A good way to begin is to delete non-records from your campus email box. Non-records as described by the Wisconsin State Statutes Chapter 16.61 include duplicates, unsolicited notes or invitations, drafts, notes, or personal materials. You are also free to delete emails used to set up routine meetings that have already occurred, or information received from list serves.

Other email records such as those which set forth university directives, policies, procedures or guidelines, certify transactions or receipts, or perpetuate or formalize business activities for the university require thoughtful record retention. For more information about this topic, read the Electronic Communication for University Records brochure.

**What are....**

**Non-Records:**
- Duplicates or Copies
- Notices, Invitations, Routing Slips, Envelopes
- Personal Materials and/or Notes
- Drafts prepared for your use or for your supervisor
- Published materials

**Retention:** Delete

**Transitory Records:**
- Business related e-mail with minimum or short term value.
- Replaces in-person conversation.

**Retention:** Retain for 7 days or destroy when obsolete because the communication has been superseded or the related event has transpired.

**Routine Records:**
- Routine e-mail communicated during the course of a project.

**Retention:** EVT + 6 months

EVENT= Business Activity or Project is completed.

For more information contact:

Peg Eusch, CRM,
University Records Officer
meusch@library.wisc.edu

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**Management of University E-mail**

University Archives and Records Management
550 Babcock Drive
432 Steenbock Library
Madison, WI 53706
Phone: 608-262-3284
recmgmt@library.wisc.edu
Examples for Managing University E-mail Records

Listed below is a narrative about how Tom managed his e-mail records when he was planning an event as part of his job responsibilities at the university.

**Example: Non-Record: Non-business or personal, a duplicate copy or spam (delete it!)**

Tom’s boss just sent an email to campus reservations asking about reserving a room on January 5th for a campus forum planned by his department. Staff from campus reservations responded to both Tom and his boss that no rooms were available for that date. Tom was copied on both of these email messages.

Tom can immediately delete these e-mail messages from his mailbox because he is not the originator of either message—the messages he received are copies of e-mail messages which are not considered records for Tom.

**Example: Transitory Communication Record: Information about workplace events, Listserv, or a quick response to a request. Think of transitory as replacing in person communication—keep 7 days until superseded or event has expired (delete it!)**

Tom followed up with campus reservations about reserving a room for an event on January 15th. Staff at campus reservations responded that a room was available for the event on January 15th.

Tom saved this e-mail until January 16th and then deleted the message since the event had already taken place on January 15th.

**Example: Routine Communication Record: Normal communications between team member(s) working on a project—keep six (6) months after event, project, or activity.**

Tom and staff from campus reservations exchanged e-mail about a request for a microphone for the campus forum event on January 15th.

Tom kept these e-mail messages for six months after the event which took place on January 15th.

**Example: University Records: policies and directives, correspondence related to official business, work schedules, meeting agendas and minutes, any document that initiates, authorizes, or completes a business transaction, reports, tenure documentation, admission documentation, search and screen documentation. Depending on the Content of the e-mail communication, refer to the University Records Retention Schedule for how long to keep.**

http://go.wisc.edu/62x8m

Tom received an invoice bill for his January 15th event embedded in an e-mail message from campus reservations.

Tom has saved this record in accordance with the University General Retention Schedule (GRS) for Fiscal and Accountline Records.