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Email Management BONUS Challenge – Track: Department Administrative Communications

Put your foot on the starting line and get ready to run! This challenge is lengthy, so break it down into sections to complete when you have time.

Congratulations! Now that you've completed all of the challenges, you're an email management ***superstar athlete***! If you're up for a more in-depth approach to ***tackle*** your email and really ***get it into tip-top shape***, this is the challenge for you!

For this challenge, we are going to tackle **department operational/administrative records**. These records are usually created and maintained *elsewhere* and *not even in email*. However, someone may create a procedure, informal agreement, workflow, etc. in the body of an email and not document it elsewhere. Any substantive operational/administrative email communications also have the same retention requirements as the agreement, plan, report, etc.

TIP:

You are permitted to delete Transient email from your inbox once it is no longer of use to you!

A Certificate of Records Destruction is not required to delete or dispose of Transient materials.

According to the University General Records Retention Schedule, the following types of operational/administrative documents should be retained relative to the content of the record:

1. **Administrative Reference Documents:** Logs, spreadsheets or programs used to track administrative activity, tasks, or workflow progress for internal convenience. (TRANSIENT)
2. **Calendars and Scheduling Documentation:** Calendars, appointment books, schedules, itineraries and other similar records that document use of time. (TRANSIENT)
3. **General Files:** Consists of correspondence, meeting agendas, projects and general files not required to be maintained elsewhere on the schedule or within a unit specific schedule. ***Must be retained for 1 year; requires a CRD***
4. Periodic Reports: Documents status of on-going work; serve as support documents for annual/summary reports. ***Must be retained for 1 year; requires a CRD***
5. **Procedures, Unit Operations:** Documents outlining internal unit procedures and/or operational protocol not rising to the level of governance procedures. Often these procedures guide day-to-day staff processes for uniformity and accuracy. (UNTIL REVISED, SUPERSEDED or OBSOLETE)
6. **Reference Files/Subject Files:** Files used as in-house reference materials. Can include, but may not be limited to articles and notes, often organized by topic, that employees may reference. These files do not contain original or official records. (TRANSIENT)
7. **Strategic Plans:** Active until strategic plan is superseded by new plan. One (1) copy must be transferred to the University Archives. ***Must be retained 1 year after superseded.***
8. **Transient Materials:** All informal and/or temporary messages, all notes and all drafts used in the production of public records by any Ohio State University employee, anonymous, unsigned and/or unsolicited written or electronic materials, including, but not limited to, anonymous student complaints, anonymous writings from individuals inside or outside the institution, and voice mail messages. (TRANSIENT)

For this challenge, we will use the retention periods to determine if these messages are no longer needed or relevant. If any of the following criteria apply, you may delete the records from your email:

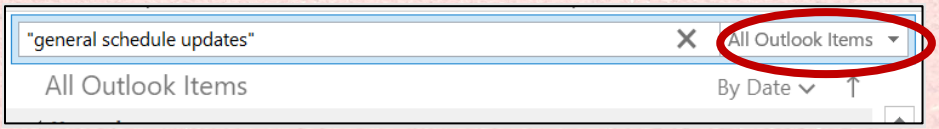
1. The retention period has expired and/or the document has been superseded.
2. You are **not** the official record holder or person responsible for retaining the document (i.e. you were CC'd on the email or FYI).
3. The email and/or it's attachment(s) have already been saved in another location, such as a shared server.
4. The email and/or it's attachment(s) are informal drafts or notes that were used to create the official document.
5. If you are the official record holder, but you have changed roles or departments, contact the new official record holder or your previous department to confirm they have access to the record. Once confirmed, you can delete the email.

Steps for identifying and deleting operational/administrative internal team communications if you are the recipient and not the custodian responsible for retaining the official record.

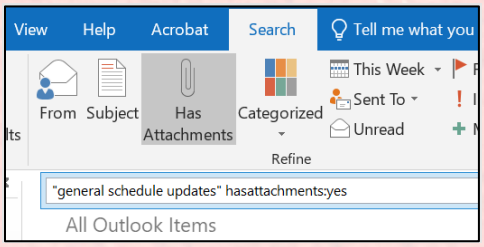
1. Empty your *Deleted Items folder.*

2. Click on your *Inbox* folder. Then, click the search bar which will open the search tab. Next to the search bar, click the drop-down menu to select **All Outlook Items**.

3. Type typical operational/administrative keywords for your department in quotations to narrow the results. Then, hit the **Enter** button.



4. If most of the operational/administrative documents are sent as attachments, you can further reduce the results list by clicking the **Has Attachments** button. Search results with attachments will have a paperclip icon. Hit the **Enter** button.

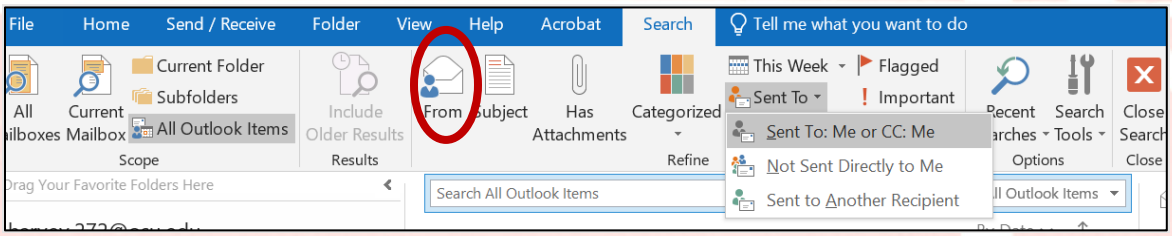


5. If you are usually copied on operational/administrative communications for informational purposes and no action is required on your part, you can also reduce the search results by looking for emails on which you are CC'd:
   - Click the **Sent To** drop-down menu. Click the option **Sent To: Me or CC: Me**.

TIP:

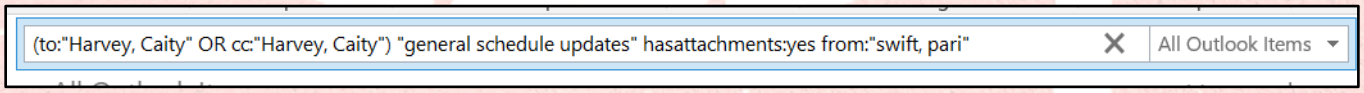
Examples of keywords to search for:

- "scheduling holiday vacation process"
- "file naming policy"
- "customer payment procedures"
- "new hire training manual"
- "petty cash log"

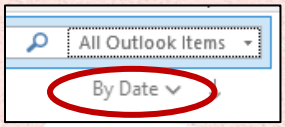


- A search phrase will auto-populate in the search bar. With your mouse, select **to:"last name, first name" OR** and hit **Delete**. This will leave just the phrase **(cc:"last name, first name")**. Hit **Enter**.

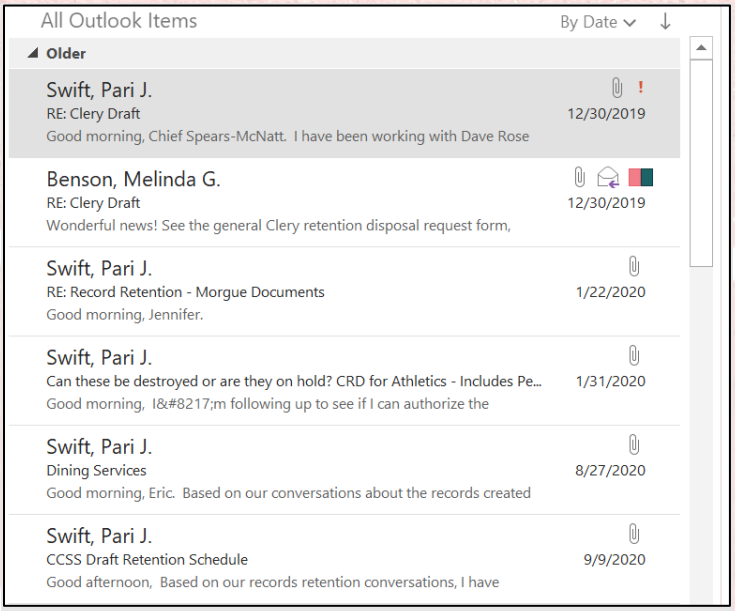
- If all operational/administrative communications are sent by a single person, you can also click the **From** button and type the sender's last name, first name in the parentheses. Hit **Enter**.



- In the drop-down menu under the search bar, ensure that the results are sorted **By Date**. Click the **arrow** to the right of the drop-down menu to point down, so that the oldest results appear at the top.



6. Do you see results? Are you only seeing messages with operational/administrative records? Do all results have attachments, if you added that criteria to your search?



TIP:

Some calendar invites could contain attachments that are not be saved in another location.

That's why it's necessary to search under **All Outlook Items,** so calendar attachments can be located and saved in a shared location.

TIP:

Outlook only pulls search results from the last 365 days. To find results older than 1 year old, scroll to the bottom of the search results and click the **MORE** link.

> There are more items in this folder on the server
>
> Click here to view more on Microsoft Exchange

TIP:

If you regularly receive operational/administrative communications for informational purposes only, you can set up a rule to automatically route email by sender (i.e. supervisors, HR professionals, B&F professionals, co-workers, etc.).

Set a calendar reminder to review this folder weekly, so you can read and delete.

This is a great way to keep your mailbox organized!

7. If you got results, now REALLY skim the list. Does your department have access to and/or still need these operational/administrative records? Delete emails that **don't** meet the following criteria:

IF the records:

- Are still needed to perform business functions
- Have not met retention yet
- Are not saved in another location
- Are the only copy of the record

THEN:

- Save the record to a shared server OR
- Upload to a database or record-keeping system OR
- Sort the email to a specific folder and apply retention

THEN:

- Delete the email!

IMPORTANT FINAL STEP: Complete the Qualtrics survey to record the number of emails moved to the **Deleted Items** folder and the new **Total Folder Sizes** for your **Inbox, Sent** and **Archive** folders so we can track your team's progress! ***(Instructions for clearing your* Deleted Items *folder and locating your* Total Folder Size *can be found in the Challenge Introduction).***

Champion! You crossed the finish line!

Challenge Wrap-Up: **Now that you've cleaned up old emails and learned new methods for identifying incoming transient or short-term administrative/operational email, learn how to apply automated retention tags to emails and folders for items that must be retained in email until retention has been met.**