

O365 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:

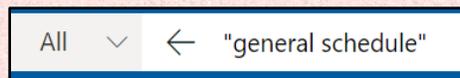
1. **Administrative Reference Documents:** Logs, spreadsheets or programs used to track administrative activity, tasks, or workflow progress for internal convenience. (TRANSIENT)
2. **Calendars and Scheduling Documentation:** Calendars, appointment books, schedules, itineraries and other similar records 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:

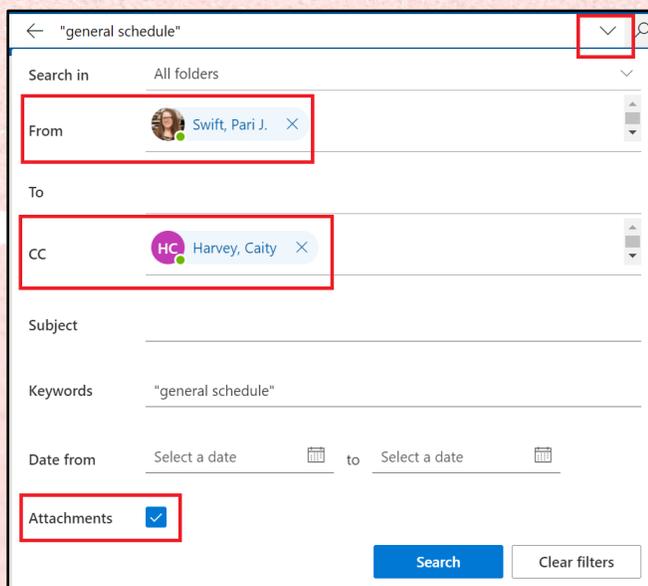
1. The retention period has expired and/or the document has been superseded.
2. You are **not** the official record holder or person responsible for retaining the document (i.e. you were CC'd on the email or FYI).
3. The email and/or it's attachment(s) have already been saved in another location, such as a shared server.
4. The email and/or it's attachment(s) are informal drafts or notes used to create the official document.
5. If you **are** the official record holder, but have changed roles or departments, contact the new official record holder or 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 the *Deleted Items folder*.
2. Click on the *Inbox* folder and then the *Search bar*. Type operational/administrative keywords in quotations, then hit **Enter**.



3. Click the drop-down arrow in the *Search bar* to narrow search results. You can search for emails in a specific date range, by the sender(s) or recipient(s), and if there are attachments.

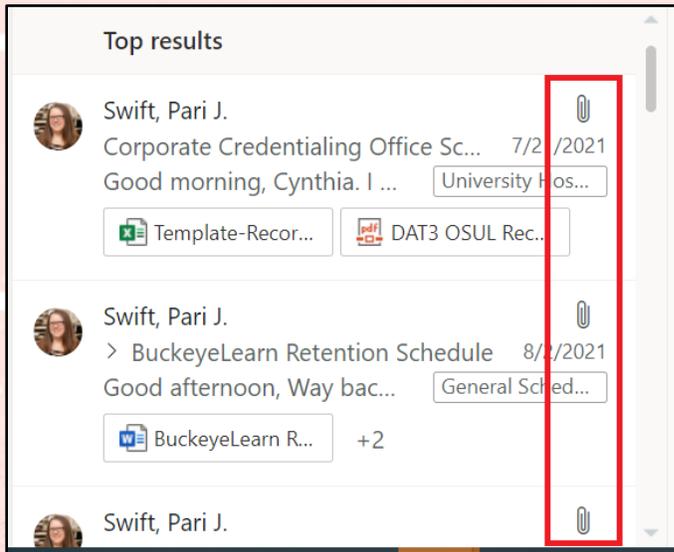


4. Do you see results? Are you only seeing operational/administrative messages? Do all results have attachments, if you added that criteria to your search? (Look for the paper clip icon.)

TIP:

Examples of keywords to search for:

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



TIP:

If you regularly receive operational/administrative communications for informational purposes only, you can create 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!

5. **If you got results, now REALLY skim the list.** Does your department have access to these operational/administrative records in a location other than Outlook? Check for the following criteria before deleting the email:

IF the records:

- Are still needed to perform business functions
- Have not met retention yet
- Are not saved in a shared 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 ([Teams](#), [OneDrive](#), [SharePoint](#)) OR
- Sort the email to a [specific folder](#) and [apply retention](#)

THEN:

- Delete the email!

TIP:

Some meeting invites could contain attachments that are not searchable in your Inbox.

Search by meeting keywords in the **Search** bar of your **Calendar**.

In the **Search** bar, click on **Selected Calendars**, then the slider button next to **Attachments** to search for meetings with attachments.

IMPORTANT FINAL STEP: Complete the [Qualtrics](#) survey to record the number of emails moved to the Deleted Items folder and the storage usage for your Inbox so we can track your team's progress! (*Instructions for clearing your Deleted Items folder and locating your storage usage 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.