

Records Management in Museums - managing your email

Some emails may be the only evidence you have of important decisions and transactions – these **museum records** must be managed and preserved over the long term. Other emails should be deleted as soon as they're no longer useful.

Save

- ✓ emails that record decisions and policy changes
- ✓ emails recording financial transactions
- ✓ emails containing object collections information
- ✓ email conversations at a significant point, eg. when a decision is reached

Delete

- ✗ spam or junk emails
- ✗ personal and social communications
- ✗ all-staff emails, out-of-office replies and mailing list messages
- ✗ meeting invitations and apologies
- ✗ cc or bcc copies for information only

Email systems are not designed for long-term storage

Folders in your email system are useful for temporary organisation and filtering, but not for permanent storage. Information that needs to be stored in the long term should be transferred into appropriate systems such as a collections management database or accession files.

Talk to your IT support

Ask about the best location in your museum's IT system for preserving your emails long term, away from your email system – 'Auto archive' is probably not the best way. You may need some advice on changing the format of messages to preserve them.

When to save

Have a set time, eg. every three months, to save or delete old emails, including 'sent' items. Check that your 'deleted items' or trash folder actually gets emptied regularly.

Attachments

Avoid sending attachments internally as they eat up server space and lead to confusion with multiple versions of documents - use links to shared drives or intranets when you can. Save the attachments you receive alongside other documents and records, away from your email system.

Writing and sending emails

Use clear, short subject lines, and restrict topics to one subject per email. Don't use external email systems for museum business.

What to do next

Find out if there is someone in your museum with responsibility for records management, or if someone is doing work in that area. Explore tools in your email system that may help – such as filters and folders - and talk to colleagues to share ideas.

Visit www.museuminfo-records.org.uk for more detailed guidance on records management in museums, interactive training and other resources to adapt and use in your museum free of charge.