

BEFORE YOU HIT 'SEND'

1. **Write for the front page.** Emails are professional communications – ask yourself how your email would represent UCSC if it appeared on the front page.
2. **Double-check the recipient email address.** Ensure its accuracy. Sending to the wrong person is embarrassing but sending sensitive information where it doesn't belong can be a crime.
3. **Use a meaningful subject line** that clearly summarizes your message. Subject lines that wrap are inconvenient; ones that say 'stuff', or 'read this' or 'today' could trigger a spam filter.
4. **Change the subject.** When an email becomes a long thread of replies it may expand or turn to other topics. Ensure the subject line reflects what is actually being discussed. The messaging system will keep track of the message thread.
5. **Limit the length.** Users seldom read multi-page emails -- attach a document to your email instead.
6. **Trim content for responses.** Excerpt only those points to which you are responding.
7. **Simplify the signature line.** Signatures longer than the message, containing political statements, or including pretty, shiny, blinking graphics are not professional.
8. **Limit the use of 'reply to all'.** Is your email really intended for everyone? Don't send personal messages, or ones the whole group doesn't need to read to everyone.
9. **Don't include the entire thread every time.** Send your contributory email including only the previous 2 or 3 thread items for context.
10. **Copy only those who need to know.** Don't cc or bcc unnecessarily.
11. **Assign Action** to recipients in the 'To' line only. Cc'd recipients don't expect to receive an action item.

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UC Santa Cruz
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Managing
Email

Information
Asset
Management Office



Do it Right from the Start

Manage Your Email

Email is business documentation and should be managed accordingly.

Sort and file it in 'folders' for easy access during its life cycle and timely disposition when it reaches the end of its retention period.

Delete junk email immediately or drop into your trash folder. Just like its paper counterparts, email can present legal risks to the University if it is retained beyond its retention period.

**IAM
EMAIL**

Separate out junk mail and delete it immediately. If you choose to drop it into your trash folder, don't postpone deletion too long or you'll find yourself scrolling and scrolling and...

Sort business-related email. Messages that aren't needed for business documentation -- general discussions, private emails and other transient messages do not need to be saved.

Create a filing system that allows you to find what you need quickly and easily. Using UC's Records Retention filing structure is a good way to begin.

Consistently managing email records is good business practice and a great time-saver when referencing material later.

Write for the Record

Sort if out

Sorting incoming email is much easier if you work with your colleagues to ensure consistent and meaningful subject lines. If you are consistent enough with this you can use it as a search parameter for faster recovery and as a sort parameter to ensure that incoming email is automatically directed to its appropriate folder.

Litigation Response Support

Courts and regulators expect rapid and complete production of information within tight deadlines, making swift and targeted retrieval essential for compliance. Messages need to be pinpointed relevant to specific topics, projects or user classes.