

Email Management Policy and Guidance

Introduction

This government-wide policy for managing email applies to all departments and agencies subject to [The Archives and Recordkeeping Act](#) and is in accordance with the [Recordkeeping Framework for Departments and Agencies: Policies and Requirements](#). This policy has been created, along with accompanying guidance, to reinforce the importance of managing email responsibly. It is intentionally broad so that it can be applied appropriately.

Program areas should review their internal practices to ensure they align with this email management policy, consult with designated records management staff in their department/agency, and make decisions that will support their recordkeeping requirements.

Departmental records management staff are encouraged to work with program areas to assess risk, value, and options so that their recordkeeping requirements can be consistently and reasonably met. For more information about department/agency responsibilities, see the [Recordkeeping Framework for Departments and Agencies: Policies and Requirements](#).

1. Policy

1.a. Emails that document government business are government records and must be managed in accordance with approved records schedules.

Explanation: All records created or received as part of government business are government records. Government records must be managed in accordance with approved records schedules. This includes emails.

Records schedules document recordkeeping requirements that are business-specific, including how long records need to be kept and how they will be disposed of at the end of the retention period.

There is no single records schedule to manage email across government because records are managed based on what they are about, not what format they are in. For more information about records schedules, see [Records Schedules: What Managers Need to Know](#).

1.b. Emails should be managed in a shared recordkeeping system.

Explanation: Government records are corporate assets that should be managed in the program area's shared [recordkeeping system](#). Shared recordkeeping systems ensure users can locate and retrieve relevant records, group related records together so that business information is comprehensive, help to prevent duplication and unmanaged accumulation, and make it possible to apply records management rules methodically.

1.c. When routinely managed in a shared recordkeeping system, emails in Outlook may be disposed of as transitory records when no longer required.

Explanation: If program areas have well-established processes for managing emails in a centralized recordkeeping system and staff routinely follow these processes, the records that remain in Outlook may be managed as [transitory records](#).

This approach allows staff to use the Outlook copy for convenience but ensures that the program area meets their requirements with the shared recordkeeping system. It also allows the department/agency to delete the email account when a staff member leaves.

Note: Some high-risk/high-value email accounts in executive government cannot be treated as transitory.

1.d. Email must remain with the program area responsible for the full retention period.

Explanation: Departments are responsible for ensuring that when staff exit their position, the email account is managed appropriately. If program areas *do not* have well-established processes for managing all records in a centralized recordkeeping system (e.g. records are only in Outlook), they must retain emails of departing staff for long enough to ensure that all requirements have been met. See [Records Management Checklists for New and Exiting Employees](#).

Note: To safeguard and protect records with archival value, email accounts associated with particular executive roles in government must be retained for long-term preservation.

2. Guidance for Staff - Best Practices for Managing Email

2.a. Make records management decisions as soon as email is created or received

Although all emails created or received as part of government business are government records, not all government records need to be retained.

Delete *transitory records* right away or when no longer needed. See the [Transitory Records Fact Sheet](#) for guidance on determining what is transitory. If the email is not transitory, then it needs to be filed with related records in a [recordkeeping system](#) as soon as possible.

Emails that document a government transaction, activity, or decision should be filed and retained alongside other records that pertain to the activity or business transaction. For the emails that need to be kept, follow work-group rules and practices to name, organize, and share them. See [Creating and Capturing Records](#) and [File Structures](#) for more information on filing, classifying, and organizing records.

Best practice is to keep all related records together, regardless of the platform in which they originated. Related records may originate in a variety of software applications but should be managed together so that the complete file/issue is kept together. See section three for additional considerations.

2.b. Determine who is responsible for managing and filing email

Generally,

- for email exchanged within a program area, the email's sender is responsible
- for email received from outside the program area, the sender and recipient of the email are each responsible
- for email that flows within a group of people who work together, assign responsibility to one individual.

When in doubt, keep a record.

2.c. Limit the content of email messages to one topic

Email messages that address multiple subjects are more difficult to file and organize, so focus the content on one subject to make acting upon and managing the message easier. Adding square brackets to the subject line with more contextual information can differentiate the thread from its predecessors and help readers understand what the content will be.

2.d. Keep the last thread

In many cases, only the last thread of a single exchange needs to be filed. When an email thread is linear and all of the exchanges appear on the last email, the various messages leading up to the final, complete record can be deleted as transitory.

Be careful, though: sometimes threads veer off! For example, emails can be forwarded and result in side conversations, or replies can be made from earlier emails. Make sure complete discussions that include all exchanges are captured.

2.e. Manage the 'Sent Items' folder

Maintaining a complete record of the email exchange means that the records in the 'Sent Items' folder also need to be managed. Your response may be the final record in the exchange, and in that case, would need to be filed.

2.f. Manage attachments

The attachments to an email are often an essential part of the record. If printing to file, attachments are generally stapled to the covering email. When saving in a shared recordkeeping system, the attachments may need to be saved as separate documents, with the file name 'attaching' it to the email message; or actions can be taken to merge the email and the attachments into a single PDF; or a format that keeps the attachments intact might be appropriate.

See section three (3) for additional considerations.

2.g. Organize in Outlook

Emails are often retained for easy access, searching, and sharing. Keep emails organized by developing robust, internal practices. There are many features in Outlook that can assist: folders, categories, rules, and flags are tools that can be used to manage the records. The key is to be consistent and do it regularly. This will help to prevent information overload, inaccessible records, and enable good management of convenience copies.

2.h. Determine how long emails should be kept

Email retention policies are business-specific and embodied in approved records schedules. [Records schedules](#) are developed by and for each program area in government. They formalize the retention periods for all records created and received in order to meet operational, legal, and fiscal requirements, regardless of format (e.g. email, digital files, paper, video, photographs).

3. Guidance for Management - Technology Considerations and Email Management

3.a. Choosing appropriate digital storage

Email is a standard communication tool but it is *not a recordkeeping system*. There are pros and cons for each type of digital storage and the benefits and risks should be analyzed, particularly where there are [high-risk/high-value records](#) involved. The main storage options are listed below along with their benefits.

Benefits	Outlook	Shared Drive	SharePoint	Document and/or Records Management System*	Printed to File
Accessible to others in program area	No	Yes	Yes	Yes	Yes
Keyword search capabilities	Yes	Depends on the 'saved as' format	Depends on the 'saved as' format	Yes	No
Filed with other related records	No	Yes	Yes	Yes	Yes
Attachments remain with associated email message	Yes	Depends on the 'saved as' format	Depends on the 'saved as' format	Yes, if integrated with Outlook	Yes
Metadata remains fixed	Yes	No, only within document	No, only within document	Yes	Yes
Requires little time to manage	Yes	No	No	Yes, if integrated with Outlook	No

*For those program areas that have a specialized system.

Since email has been a standard mode of communication for many years, it is likely that established practices are already in place. Risks should be assessed and mitigated.

If changing practices, it will be important to consider other factors, such as staff 'buy in', the resources required, and the recordkeeping system being used. The goal is to ensure recordkeeping requirements are being met for the program area. Practices should align with those requirements.

3.b. Email formats

When moving emails into a shared recordkeeping system, you may need to consider what format will make the most sense. Exporting email from Outlook can be done in several formats, each with its own advantages and limitations. Here's a breakdown of the most common formats:

Format*	Pros	Cons	Recommended for
MSG (Outlook item)	- can drag and drop the file - will open in Outlook and can be further actioned (e.g. forwarded, replied to) - saves emails with full metadata and attachments	- dependent on the Outlook application or a compatible viewer - not ideal for bulk export - limited interoperability with non-Microsoft systems	retaining individual messages
PDF	- creates a 'fixed record' - universally accessible and easy to share	- not editable or re-importable into email application - metadata may be lost or flattened - doesn't include attachments	sharing readable content; legal compliance
HTML	- readable in any text editor or browser	- no metadata or attachments - formatting may be lost - not suitable for re-importing - not suitable as a source of evidence	sharing readable content
PST	- preserves full email structures (folders, metadata, attachments) - ideal for saving large volumes of email - can be re-imported back into Outlook easily	- requires Outlook to open - not suitable for sharing individual messages - large .pst files can be corrupted - emails remain siloed in Outlook; doesn't save files with related records in a recordkeeping system - is no longer fully supported by Microsoft	not generally recommended
EML	- an open standard – isn't Outlook dependent - preserves headers, content, attachments - suitable for long-term preservation and migration	- may lose some Outlook-specific metadata - folder structure not preserved unless exported with additional tools	retaining individual messages; only for agencies that have deployed 'Outlook web' or 'New Outlook'

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