

TRIM BUSINESS RULE – Faculties/Sections		
Number	Description	Issue Date
3	EMAIL CAPTURE	Jul 10

**Policy:** USQ staff are required to create, capture and manage business emails in accordance with Qld State Archives *Managing Emails that are Public Records* policy and guidelines. This includes emails that provide evidence of a public authority (including USQ):

- conducting business activities;
- making decisions; and
- carrying out transactions.

The above policy statement includes email **discussion** which may, or may not, lead to a business decision and/or transaction.

1. All business related email, **created or received** by USQ, in the ordinary course of business activities will be captured into TRIM.
2. Emails containing solely **personal** related information i.e. non-business will **NOT** be captured into TRIM.
3. Emails containing a mix of both USQ business activity and personal matter **WILL** be captured into TRIM.

**Note 1:** Personal information contained in original email **MUST** remain.

**Note 2:** There are financial penalties, under the Public Records Act 2002, for altering a public record.

4. Emails of short-term informational value (examples below) should **NOT** be captured into TRIM.
  - 'Meet me for coffee .....
  - 'Lights on in the car park .....

**5. Methodology for email capture (examples only):**

- Non – confidential - catalogue to TRIM **or** use Pending Folder
- Confidential - catalogue to TRIM **or** use Pending Folder

**6. Timing for capture:**

- capture each email (and attachment) as it is sent or received (routine component of business process)

**Note:** Often emails involve a thread of communication that can continue for a period of time. Adoption of above procedure will ensure timely capture of all relevant discussion.

## 7. Responsibility for capture:

- **sender:** initiates capture when an email is sent to either single or multiple internal or external recipients;
- **single recipient:** initiates capture when:
  - i. the email relates to their work;
  - ii. they are involved in the business transaction to which the email relates; and
  - iii. the email is from an **external** sender
- **multiple recipient:**
  - (a) if a senior manager is on circulation list then Executive Assistant or delegate will initiate capture;
  - (b) in all other cases, the first person on the receiving list initiates capture.

## 8. Titling of emails:

- **subject line of each email created must accurately reflect the topic of the email.**

<p><b>Note:</b> This is a critical issue which informs the classification process i.e. enables the email to be attached to the correct TRIM file folder which, in turn, assists the search process for TRIM users.</p>
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## 9. Disposal of emails:

- emails that are public records may be deleted from user inboxes **only after** they have been captured into TRIM.

**Note 1:** Emails that are public records can only be destroyed in accordance with an approved Retention and Disposal Schedule.

**Note 2:** Emails, attached to a TRIM file folder, inherit the retention period applied to the TRIM folder.

## 10. Classification and attachment of emails to TRIM folders:

- **faculty/section TRIM users** - appropriate training will be provided for TRIM Power users (to be identified); and
- **faculty/section (non-TRIM users)** – managed by designated records management person in faculty/section.

## Summary

End users are able to transfer emails from Microsoft Outlook (email system) directly into an existing TRIM file folder, or alternatively, a TRIM Pending Folder set up exclusively for an individual or work group. This enables the email to be managed as a record, linked to other related records, regardless of format.