CURATING E-MAILS

The widespread adoption of e-mail as the preferred means of professional communications has dramatically impacted the way that people work. This can be problematic for many organisations as the traditional record-keeping infrastructure is often inadequate for ensuring that messages in individual e-mail accounts are properly managed. Relying on backup tapes or simply purging messages from accounts after a specified period of time is not an appropriate solution to curating e-mails. Rather, organisational, cultural and technical solutions must be implemented to ensure messages are adequately maintained and remain accessible as required.

Short-term benefits & long-term value

Effective e-mail curation requires active management over the entire life-cycle of the messages. In the short-term, successful e-mail curation:
- Encourages more efficient use of e-mail as a business tool
- Enables shared access to organisational messages in an efficient way
- Facilitates compliance with legal record-keeping requirements

Over the longer-term, e-mail curation:
- Enhances long-term stability and persistence of e-mails
- Allows ongoing access to reliable messages and attachments
- Achieves organisational retention requirements in the most cost-effective manner
- Provides a valuable resource for future data users

HE/FE perspective

The business of HE / FE institutions is increasingly transacted by e-mail. 'Consequently e-mail correspondence is now being routinely used to transact and record decisions that were previously offered in paper form only; e-mails are frequently the only record of these transactions. In this context e-mail and their attachments are records of value and need to be managed within the University's records management system like any other record.'

– **Michael Norris**, *Loughborough University, JISC Institutional Records and e-mails project final report, November 2003.*

eScience perspective

eScience developments and discoveries are increasingly documented in e-mail communications. However, 'With limits of hard-drive space on mail servers, institutional users are routinely faced with the requirement to cleanse mailboxes. The pen may be mightier than the sword, but a single mouse-click can destroy products of inestimable value'.

- **Errol C. Friedberg**, **Herbert K Hagler**, **Kevin J. Land**, *(Department of Pathology, University of Texas, Southwestern Medical Centre, Dallas), in Nature Vol 423, June 2003.*

Roles and responsibilities

Best practice for e-mail curation and preservation has yet to achieve any real consensus. However, most agree that organisational and cultural activities must take place alongside technical developments, as all three areas impact the overall success of any e-mail curation approach. As curation and preservation activities will occur at various stages over the record life-cycle, a wide range of people will have specific roles and responsibilities for the long-term management of e-mails. It is vital that each individual understands their role and how they fit into the overall curation process.

This will require that:

- Support from senior management is secured from the outset; this is vital for the viability of any curation approach

- A curation policy is developed and agreed to formally identify the range of individual roles and responsibilities

- Message creators are made aware of their role and that adequate training is provided to enable them to create sustainable, authentic messages that comply with legal and administrative requirements

- Data curators co-operate with all stakeholders to ensure compatibility over the life-cycle of the e-mail record; develop an appropriate and achievable technical and organisational infrastructure; and implement realistic and reliable archiving and preservation approaches

Ongoing and effective communications and co-ordination of efforts between stakeholders is crucial for the success of any e-mail curation activity.

Additional resources

Digital Preservation Testbed From digital volatility to digital permanence: Preserving email, The Hague, April 2003, ISBN 90-807758-1-9

DAVID - Archiving e-mail, Boudrez, F & Eynde, Sofie Van den (August 2002)

Institutional Records Management and E-mail Final Report, Michael Norris (November 2003)

XMaiL software - freely available software from the Dutch National Archives to create XML versions of e-mails at source.

XENA software - freely available software from the National Archives of Australia to create XML versions of e-mails when ingesting into a repository.