D-TOKs: **Delete / TOss / Keep stuff**

Getting rid of paper and electronic non-records that are no longer needed.

Some tips and tricks!
Non-Record:

“Material that is of immediate value only.” (page 3)

“Non-records may share some characteristics with administrative records; however, they are distinguished from administrative records by their transitory usefulness.” (page 6)

Business and Finance Bulletin RMP-2 Records retention and disposition: principles, processes, and guidelines
More from RMP-2 about Non-Records

“...; they should be disposed of once their period of immediate usefulness has passed. If non-records are not handled in accordance with their temporary nature, the unnecessary use of university resources may occur. If not disposed of, non-records may be subject to disclosure (e.g., under the California Public Records Act, Information Practices Act, or discovery of evidence in a legal proceeding).” (page 6)
Examples of Non-Records

- Data entry-sheets and work-sheets
- Rough drafts, unofficial copies
- Multiple copies of publications
- Notes/recordings that have been transcribed
- Catalogs, trade journals, manuals
- Transmittal letters
- Copies of directives & issuances from other offices
- Commercially available software
- Electronic information may be “non-record” if it fails to meet the definition of a “record”
Something is **Not** a Record when:

→ Another copy is in an official file

→ It has no evidential or informational value

→ It consists of processed or printed material maintained for reference or distribution

→ Personal Papers

→ It is R.O.T. = Redundant, Obsolete or Trivial material
Caution!!!

Not everything goes in a recycle bin!

- Non-records containing **Personal**, **Restricted**, **Confidential** or **Sensitive** Information must be destroyed in a secured manner, such as securely shredded.
Think before you recycle:

**Content**

- Look at the subject matter or *contents* of the materials

If there is information that, if accessed or used inappropriately, could adversely affect the university, its partners, or the public

- Then it must **NOT** be recycled.

**Shred**

- The materials will need to be shredded so that they cannot be accessed, read, or reconstructed.

More information found in RMP-2, Appendix B
RMP-2, Appendix B

- Confidential Information
- Personal Information
- Attorney-Client Privileged Records
- Records of Outside Parties Containing Trade Secrets or Proprietary Information
- Protected Health Information
- Restricted Sensitivity Records
- Personally Identifiable Information
Circumstances when you **should not** destroy non-records (or records with lapsed retention periods)

- if a Public Records Act Request has not been satisfied
- pending, foreseeable, or ongoing litigation;
- an investigation; or
- an ongoing audit pertaining to the records is taking place

*They cannot be destroyed until these actions have been completed or resolved.*
Is It A Record?

**Recorded Information**

- Are you or your department the creator of the record? Did you generate or receive the information to use for your technical/administrative work here at UC?
- Does it contain informational value as evidence of your group’s functions, policies, decisions, procedures, operations, mission, programs, projects, or activities?
- Is it something that originated in another office or outside UC, but you commented or took action on it?
- Does it document UC actions, such as: what happened, what was decided, what advice was given, who was involved, when it happened, the order of events and decisions?
- Is it related to UC business and does not exist elsewhere?
- Is it a draft or interim document that has not been circulated to others or does not contain substantive comments and for which there is a final version being maintained?
- Is it published or processed information that you received and use as reference?
- Is it a copy kept only for convenience of reference on which no action is taken?
- Is it information accumulated and maintained at the workplace, but which does not affect or reflect the transaction of your program business?
- Is it junk mail, spam, or documentation that has no work-related informational or evidentiary value?

Questions?

Contact the Records Manager, Laurie Sletten, 510-987-9411, for information.

http://ucop.edu/information-technology-services/initiatives/records-retention-management/index.html
Electronic Non-Records

• Most broadly distributed informational e-mail messages
• Some e-mail messages where the sender has “.com” or “.org” at the end of their e-mail address
• Drafts of reports or other documents, after the final one has been distributed
• Things you have downloaded off of the Internet for reference purposes
• Copies stored in different places
Sorting out E-mail

- E-mail
  - Non-Record E-mail - **Delete**
    - Personal E-mail - **Delete**
  - Work-Related E-mail
    - Informational/Reference E-mail - FYIs, CCs, and BCs) - **Delete when no longer needed**
<table>
<thead>
<tr>
<th>Name</th>
<th>Email Subject</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisa Maxwell</td>
<td>Archives building</td>
<td>Thu 5/6/2004...</td>
</tr>
<tr>
<td>Laurie Slet.</td>
<td>RE: Fiscal Year 2004-05 County Budget Forms</td>
<td>Thu 5/6/2004...</td>
</tr>
<tr>
<td>Laurie Slet.</td>
<td>RE: Fiscal Year 2004-05 County Budget Forms</td>
<td>Thu 5/6/2004...</td>
</tr>
<tr>
<td>Mark Ferg.</td>
<td>RE: ERk slides - again</td>
<td>Wed 5/5/2004...</td>
</tr>
<tr>
<td>Laurie Slet.</td>
<td>RE: ERk slides - again</td>
<td>Wed 5/5/2004...</td>
</tr>
<tr>
<td>MktgSiteUs.</td>
<td>Your registration on <a href="http://www.mondaq.com">www.mondaq.com</a></td>
<td>Wed 5/5/2004...</td>
</tr>
<tr>
<td>Mark Ferg.</td>
<td>ERk slides - again</td>
<td>Tue 5/4/2004...</td>
</tr>
<tr>
<td>Shayne Del.</td>
<td>Journal #224</td>
<td>Tue 5/4/2004...</td>
</tr>
<tr>
<td>Jones, Virg.</td>
<td>ICRM Exams - May 2004</td>
<td>Mon 5/3/2004...</td>
</tr>
<tr>
<td>Mark Ferg.</td>
<td>Re: Thoughts on regional raco</td>
<td>Tue 4/27/2004...</td>
</tr>
<tr>
<td>Laurie Slet.</td>
<td>Thoughts on regional raco</td>
<td>Tue 4/27/2004...</td>
</tr>
<tr>
<td>Jim Mullen</td>
<td>RE: Are you stirring up the waters again? ~(:.&gt;)</td>
<td>Fri 4/23/2004...</td>
</tr>
<tr>
<td>Laurie Slet.</td>
<td>RE: Are you stirring up the waters again? ~(:.&gt;)</td>
<td>Fri 4/23/2004...</td>
</tr>
<tr>
<td>Jim Mullen</td>
<td>Are you stirring up the waters again? ~(:.&gt;)</td>
<td>Fri 4/23/2004...</td>
</tr>
<tr>
<td>registratio.</td>
<td>Monday User Registration</td>
<td>Wed 4/21/2004...</td>
</tr>
<tr>
<td>Laurie Slet.</td>
<td>RE: How are you?</td>
<td>Wed 4/21/2004...</td>
</tr>
<tr>
<td>Eileen Bolger</td>
<td>How are you?</td>
<td>Wed 4/21/2004...</td>
</tr>
<tr>
<td>Laurie Slet.</td>
<td>FW: GCN Daily Updates Story: GPO and its Collection of Last Re...</td>
<td>Wed 4/21/2004...</td>
</tr>
<tr>
<td>Isletten@li.</td>
<td>GCN Daily Updates Story: GPO and its Collection of Last Resort</td>
<td>Wed 4/21/2004...</td>
</tr>
<tr>
<td>Laurie Slet.</td>
<td>RE: GIS presentation</td>
<td>Tue 4/20/2004...</td>
</tr>
<tr>
<td>Mark Ferg.</td>
<td>GIS presentation</td>
<td>Tue 4/20/2004...</td>
</tr>
</tbody>
</table>

**Typical E-mail “In Box” - Most of the messages shown are NOT Records!**
Typical Non-Record, “Spam” E-mail

April 17, 2002


Tele-immersion: The Virtual Meeting
Listen and watch as scientist and visionary Jason Lanier (coiner of the phrase "virtual reality") describes how the newest melding of virtual you-are-there with videoconferencing might just save you the cost of a lot of business trips in the future.

http://www2.cio.com/conferences/january2002/lanier.html

------------------------ADVERTISEMENT------------------------
This Darwin Observer is sponsored by Satmetrix
Another example of “Spam” E-mail

For those of you who have been anxiously waiting, my newly published book, *Spirit of the Red Horse* has arrived!!

I have ordered a limited number of hard-bound copies for my special friends and will have them available for sale tomorrow at lunch time at Union 3.

Come on up, meet the author and get your own autographed copy ($28.00 – cash, check or money order) and share my excitement!!

If you prefer a paperback edition, it is available at Amazon.com for $15.99. Go here: http://www.amazon.com/Spirit-Red-Horse-Cindy-Birko/dp/1419686690/ref=sr_1_1?ie=UTF8&s=books&qid=1203020918&sr=1-1
Non-Record message

Reference Sources:

- http://www.blm.gov/or/resources/recreation/rogue/index.php

Rapid Class Designations:

- **Class 1**: Very small rough areas, requires no maneuvering. (Skill Level: None)
- **Class 2**: Some rough water, maybe some rocks, small drops, might require maneuvering. (Skill Level: Basic Paddling Skill)
- **Class 3**: Whitewater, medium waves, maybe a 3-5 ft drop, but not much considerable danger. May require significant maneuvering. (Skill Level: Experienced paddling skills)

River Guide with Camp & Ramp Locations;

**Whitehorse Park** (right bank) is a Josephine County facility with fee camping at 44 campsites, eight with full hookups. The park features restrooms, showers, a playground, a picnic area, a boat ramp, fishing access, and a short hiking trail through a wetland birding area. **Contact**: Josephine County Parks Department, 541/474-5285, 125 Ringuette, Grants Pass, OR 97527 www.co.josephine.or.us/parks/index.htm (26.3 miles upriver from Grave
Non-Record message

Subject: FW: Sad News

With all the sadness and trauma going on in the world at the moment, it is worth reflecting on the death of a very important person, which almost went unnoticed.

Larry LaPrise, the man who wrote "The Hokey Pokey", died peacefully at the age of 93.

The most traumatic part for his family was getting him into the coffin. They put his left leg in. And then the trouble started.
Hi, Everyone,
I wanted to let you know that we will be having another Non-Records Purge April 20-24, 2015. This one, called Non-Records D-TOKs [Delete, TOss, or Keep stuff] Purge Week, will be for paper and electronically stored non-records.

There will be a webinar with more information on Tuesday, April 14 from 2:00-3:00 pm. The topic is called “D-TOKs: Getting rid of paper and electronic records that are no longer needed” and will include some tips and tricks.

The session will be available via ReadyTalk:
Call in information:
Number: 1-866-740-1260
Access code: 9879411

Online portion:
www.readytalk.com
Access code: 9879411

For anyone who will not have the opportunity to attend the webinar, it will be recorded through Ready Talk and will be accessible shortly after at this web-page:
http://www.ucop.edu/information-technology-services/initiatives/records-retention-management/training-materials.html

I have attached a flyer for more information about the Non-Records D-TOKs purge week and webinar.
Hi, Everyone,
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I have attached a flyer for more information about the Non-Records D-TOKs purge week and webinar.

A “Record” message for me
Questions you should ask when reviewing messages

—is I the **originator** of the message?

- Is it a **substantive** message or just routine ‘chit-chat’?

- If so, does the message have to do with the work of my office?

- Is the content of the message something that I will need in future years to do my job?
Questions you should ask when reviewing messages

- Does the message support decisions that were made in my program area?
- If I am the recipient, is the message “information only”?
- Does it require me to take action?
- Will someone need the message for operational, fiscal, or legal purposes?

*Use the same thought processes as you do when taking action on other documents that cross your desk! BE SELECTIVE ABOUT WHAT YOU KEEP!* 

D-TOKs: Delete / TOss / Keep stuff
D-TOKs: Delete / TOss / Keep stuff
Right click at root folder. Click on last option for “Properties for . . .

Or . . .

D-TOKs: Delete / TOss / Keep stuff
Account Information

UCOP Microsoft Exchange

Account Settings
Modify settings for this account, and configure additional connections.
- Access this account on the web.
  https://owa.ucop.edu/owa/

Automatic Replies (Out of Office)
Use automatic replies to notify others that you are out of office, on vacation, or not available to respond to e-mail messages.

Mailbox Cleanup
Manage the size of your mailbox by emptying Deleted Items and archiving.

Rules and Alerts
Use Rules and Alerts to help organize your incoming e-mail messages, and receive updates when items are added, changed, or removed.

Mailbox Cleanup...
Manage mailbox size with advanced tools.

Empty Deleted Items Folder
Permanently delete all items in the Deleted Items folder.

Archive...
Move old items to Archive Folders in the folder list.
“Microsoft recommends never, ever letting your PST file get above 1.6 gigs, because of the likelihood of corruption and the difficulty in restoration.”
D-TOKs: Delete / TOss / Keep stuff
Step 1

Step 2

Step 3
<table>
<thead>
<tr>
<th>Subject</th>
<th>Location</th>
<th>Start</th>
<th>End</th>
<th>Recurrence</th>
<th>Categories</th>
<th>In Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laurie - NAGARA Local Arrangements</td>
<td>DO Conference room</td>
<td>Thu 2/19/2004 9:30 AM</td>
<td>Thu 2/19/2004 10:30 AM</td>
<td>(none)</td>
<td></td>
<td>Calendar</td>
</tr>
<tr>
<td>Web Preservation Project</td>
<td>Mon 9/27/2004 11:00 AM</td>
<td>Mon 9/27/2004 12:00 PM</td>
<td>(none)</td>
<td></td>
<td></td>
<td>Calendar</td>
</tr>
<tr>
<td>Meeting w/DES DBME Tempe Office</td>
<td></td>
<td>Mon 1/31/2005 11:30 AM</td>
<td>Mon 1/31/2005 2:00 PM</td>
<td>(none)</td>
<td></td>
<td>Calendar</td>
</tr>
<tr>
<td>Email guidelines</td>
<td>RPM's office</td>
<td>Fri 3/25/2005 11:00 AM</td>
<td>Fri 3/25/2005 12:00 AM</td>
<td>(none)</td>
<td></td>
<td>Calendar</td>
</tr>
<tr>
<td>FW Meeting Confirmation: April 5th with MPC Computers</td>
<td>RMD Conference Room</td>
<td>Tue 4/5/2005 9:30 AM</td>
<td>Tue 4/5/2005 11:00 AM</td>
<td>(none)</td>
<td></td>
<td>Calendar</td>
</tr>
<tr>
<td>Meeting with Victoria Regeis, Senate Research Staff Director</td>
<td>Basement of the Senate</td>
<td>Fri 6/3/2005 3:00 PM</td>
<td>Fri 6/5/2005 4:00 PM</td>
<td>(none)</td>
<td></td>
<td>Calendar</td>
</tr>
<tr>
<td>Laurie - AIM Panel teleconference</td>
<td></td>
<td>Tue 6/21/2005 11:00 AM</td>
<td>Tue 6/21/2005 12:00 PM</td>
<td>(none)</td>
<td></td>
<td>Calendar</td>
</tr>
</tbody>
</table>

36 Items
INFORMATIONAL SERIES

D-TOKs: Delete / TOss / Keep stuff

---

[Calendar interface with search options and Advanced Find dialog box open.]

[Advanced Find dialog box with 'Look for: Appointments and Meetings' selected.]

[Define more criteria: A list of frequently-used fields and Recurring fields are expanded.]
<table>
<thead>
<tr>
<th>Subject</th>
<th>Location</th>
<th>Start</th>
<th>End</th>
<th>Recurrence</th>
<th>Categories</th>
<th>In Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated Digital Government Cluster meeting</td>
<td></td>
<td>Mon 4/19/2004 2:00 PM</td>
<td>Mon 4/19/2004 3:00 PM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>Folks, let's try meeting on the third Monday of each month in the afternoon. We can reschedule individual meetings as necessary. Please confirm by accepting this meeting.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NAGARA</td>
<td></td>
<td>Wed 7/14/2004 12:00 AM</td>
<td>Thu 7/15/2004 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>Convocation</td>
<td></td>
<td>Sat 3/4/2006 11:00 PM</td>
<td>Sun 3/5/2006 11:00 PM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>Laurie - out?</td>
<td></td>
<td>Wed 8/2/2006 12:00 AM</td>
<td>Thu 8/3/2006 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>Updated Building Evaluation Capacity</td>
<td>Phoenix, details forthcoming</td>
<td>Thu 10/12/2006 8:00 AM</td>
<td>Thu 10/12/2006 11:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>Folks, sorry about the original appoint stretching into Saturday. MS Outlook was being a little too helpful. The correct dates are Thu and Fri, 12-13th October</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Karen and Laurie - Arizona Digital Government Summit</td>
<td></td>
<td>Wed 5/20/2007 12:00 AM</td>
<td>Thu 5/31/2007 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>AILM training</td>
<td>Hyatt Regency, 122 Nort.</td>
<td>Tue 7/24/2007 12:00 AM</td>
<td>Wed 7/25/2007 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>State Bar meeting this week</td>
<td></td>
<td>Mon 9/17/2007 12:00 AM</td>
<td>Tue 9/18/2007 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>Lisa - vacation</td>
<td></td>
<td>Mon 9/17/2007 12:00 AM</td>
<td>Tue 9/18/2007 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>Approved by LFS 4-10-2007 &lt;end&gt;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARMA Conference</td>
<td>Baltimore</td>
<td>Sat 10/6/2007 12:00 AM</td>
<td>Sun 10/7/2007 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>MER in Chicago</td>
<td></td>
<td>Mon 5/19/2008 12:00 AM</td>
<td>Tue 5/20/2008 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>ARMA Conference - Las Vegas</td>
<td></td>
<td>Sat 10/18/2008 12:00 AM</td>
<td>Sun 10/19/2008 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
<tr>
<td>MER in Chicago</td>
<td></td>
<td>Mon 5/18/2009 12:00 AM</td>
<td>Tue 5/19/2009 12:00 AM</td>
<td>(none)</td>
<td>Calendar</td>
<td>Calendar</td>
</tr>
</tbody>
</table>
INFORMATIONAL SERIES

D-TOKs: Delete / TOss / Keep stuff
Look for: Appointments and Meetings
In: Calendar

Find items that match these criteria:
Optional Attendees contains Sletten

Define more criteria:
Field
Condition
Value

Add to List
Remove

More Advanced...
D-TOKs: Delete / TOss / Keep stuff

INFORMATIONAL SERIES

Clean Up Folder
Clean Up Folder & Subfolders

Clean Up Folder

All redundant messages in the current folder will be moved to the "Deleted Items" folder.

Clean Up Folder

All redundant messages in the current folder and its subfolders will be moved to the "Deleted Items" folder.
### INFORMATIONAL SERIES

**D-TOKs: Delete / TOss / Keep stuff**

![Message Search Interface]

**Look for:** Messages

**In:** Inbox; Sent Items

**Search for the word(s):**

**In:** subject field only

**From:** .com

**Sent To:**

**Where I am:** the only person on the To line

**Time:** none anytime

<table>
<thead>
<tr>
<th>From</th>
<th>Subject</th>
<th>Received</th>
<th>Size</th>
<th>Categories</th>
<th>In Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>O’Brien, Amy...</td>
<td>RE: Moving on</td>
<td>Mon 7/30/2007</td>
<td>27 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>Edward Dabr...</td>
<td>RE: Moving on</td>
<td>Mon 7/30/2007</td>
<td>29 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>Doucet, Chuck</td>
<td>RE: Moving on</td>
<td>Mon 7/30/2007</td>
<td>22 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>Ian Thomas</td>
<td>RE: Moving on</td>
<td>Mon 7/30/2007</td>
<td>25 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>Shannon Sav...</td>
<td>RE: Moving on</td>
<td>Mon 7/30/2007</td>
<td>18 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>Cothern, Lea...</td>
<td>New Contact Info - Leah</td>
<td>Sun 7/29/2007</td>
<td>42 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>Joe Devinney</td>
<td>RE:</td>
<td>Sun 7/29/2007</td>
<td>47 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>O’Brien, Amy...</td>
<td></td>
<td>Sun 7/29/2007</td>
<td>47 KB</td>
<td></td>
<td>Inbox</td>
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<tr>
<td>BNA</td>
<td>Electronic Evidence Update 07-25-07</td>
<td>Wed 7/25/2007</td>
<td>46 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>O’Brien, Amy...</td>
<td>Agenda: 7/23 Transition Core Team Meeting</td>
<td>Thu 7/19/2007</td>
<td>165 KB</td>
<td></td>
<td>Inbox</td>
</tr>
<tr>
<td>O’Neill Softw...</td>
<td>[BULK] Latest News... Hints and Tips...</td>
<td>Thu 7/19/2007</td>
<td>91 KB</td>
<td></td>
<td>Inbox</td>
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<tr>
<td>BNA</td>
<td>Electronic Evidence Update 07-18-07</td>
<td>Wed 7/18/2007</td>
<td>46 KB</td>
<td></td>
<td>E-records</td>
</tr>
<tr>
<td>O’Brien, Amy...</td>
<td>Notes: 7/12 Core Team Meeting</td>
<td>Wed 7/18/2007</td>
<td>138 KB</td>
<td></td>
<td>Move planning</td>
</tr>
</tbody>
</table>

542 Items
You can use this tool to manage the size of your mailbox. You can find types of items to delete or move, empty the deleted items folder, or you can have Outlook transfer items to an archive file.

- Find items older than [90 days]
- Find items larger than [250 kilobytes]

Emptying the deleted items folder permanently deletes those items.

Delete all alternate versions of items in your mailbox.
INFORMATIONAL SERIES

D-TOKs: Delete / TOss / Keep stuff
Account Information

Account Settings
Modify settings for this account, and configure additional connections.
- Access this account on the web.
  https://owa.ucop.edu/OWA/

Automatic Replies (Out of Office)
Use automatic replies to notify others that you are out of office, on vacation, or not available to respond to e-mail messages.

Mailbox Cleanup
Manage the size of your mailbox by emptying Deleted Items and archiving.

Rules and Alerts
Use Rules and Alerts to help organize your incoming e-mail messages, and receive updates when items are added, changed, or removed.

Mailbox Cleanup...
Manage mailbox size with advanced tools.

Empty Deleted Items Folder
Permanently delete all items in the Deleted Items folder.

Archive...
Move old items to Archive Folders in the folder list.
Things to think about for the future

• Do you need to hit reply all?
• Do you need to reply at all?
• Do you need to send a message to multiple people with an attachment? Can you send them a link instead?
• Do you need to retain the message at all?
• E-mail messages can be subject to the Public Records Act, investigations, and e-discovery.
Things to think about for the future

• Once an e-mail leaves your outbox, you have lost control over its distribution. Be careful about sending information (proprietary, confidential, trade secrets, etc.) that should not be seen by everyone.

• Proof read your message before sending.

• Ask permission before forwarding someone else’s message.

• Use a descriptive subject line.
Sorting out other types of E-files

• Non-Records- **Delete**
  - Personal Files – **Delete**
  - Informational/Reference Files (not considered record material) - **Delete when no longer needed**

• Work-Related Documents
What to purge….

- Those non-records that are no longer needed for reference; ones you thought you’d refer back to but never did.
- Duplicates of things already stored and officially filed somewhere else.
- Duplicates of things on Inter-, Intranet sites.
- Extra versions of final documents, and extra versions of drafts that are no longer needed.
What to purge….

- Those records with lapsed retention periods and are no longer required to be kept.
- All records holds for the records have been lifted.
What to keep

• Those things still needed for reference (that you really will use)
• Things used for creating or updating other things: Photos, PowerPoint Slides, etc.
• Duplicates that you use differently from the “original”
• Anything that you still need that is best left in electronic form so that it can be updated and/or shared
• Consider moving these reference things into a central place where they can be easily identified as non-records that are used for reference and easily purged when no longer of value
What to keep and how

- Things that are still required to be kept
- Use naming conventions for titles of documents and other objects that have been agreed upon by all users
- Set up a framework that allows items to have the proper security measures in place so they can be protected from unauthorized access
- Avoid storing duplicate copies
- This framework should also allow for easy purging
- Move the items to specific filing locations that have been agreed upon by all users
What else do you need to know about our D-TOKs Non-Records Purge Week?

• It is April 20-24, 2015. Our Records Compliance Week will be in August.
• There will be recycle barrels available.
• Please work with your manager to coordinate the purging of your department’s paper and electronic Non-Records.
• If you need help, I will be available to help:
  - Phone before event, ext. 7-9411
  - laurie.sletten@ucop.edu
  - Phone during event, ext. 7-3823
What else do you need to know about our D-TOKs Non-Records Purge Week?

Do not discard anything that is the subject of a litigation hold or other records freeze or has been requested pursuant to the California Public Records Act, an investigation, an ongoing audit or other legal process.

If you have any questions about whether something is required to be preserved for legal reasons, please contact the Office of the General Counsel.
Important Websites

- UC Records Retention Schedule (http://recordsretention.ucop.edu/)
- UC-Office of the President Records Retention Management (http://www.ucop.edu/information-technology-services/initiatives/records-retention-management/index.html)
- Email Management at UCOP (http://www.ucop.edu/information-technology-services/units/e-mail-management-at-ucop.html)
- Shredding Records (http://www.ucop.edu/building-administrative-services/services/records-shredding.html)
- UC-Wide Records Management (http://www.ucop.edu/information-technology-services/initiatives/records-management/index.html)
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