JUPITER PRIME
Consulting • Training • Advisory
جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Email and Digital Records Retention Training Course

4 – 8 October 2027
London

Email and Digital Records Retention Training Course

Ref: 679_25339 **Date:** 4 – 8 October 2027 **Location:** London **Fees:** 5800 GBP

Email and Digital Records Retention is a 1-week training course for records officers and administrative staff who handle mailboxes, shared drives and scanned files, in which each participant drafts an electronic records retention plan for their own unit. Most business evidence now lives in inboxes and cloud folders, not cabinets. Jupiter Prime Training runs this course for staff who decide what digital material is kept and for how long.

Why Email and Digital Records Retention Matters Now

Three forces shape digital retention today. Mailbox volumes and collaboration platforms multiply copies of the same message, attachment and draft. Auditors, legal advisers and information requesters expect a specific email or spreadsheet to be produced intact, with its context. File formats age, so a document saved today may not open in ten years without planned migration. Units that schedule digital material answer requests quickly; others pay for storage and keep personal data too long. The course draws on ISO 15489-1 for records concepts and principles and ISO 16175 for the functions records software should provide.

Who Gains Most from Email and Digital Records Retention

- Records officers who maintain retention schedules and disposal approvals
- Administrators who manage team mailboxes, shared drives and collaboration sites
- Coordinators who scan paper files and index the resulting images
- Assistants who file correspondence and attachments for managers and committees
- Support staff who answer requests for stored emails

A records unit gains most when its officers attend with the mailbox and shared drive administrators of the departments it serves, because capture rules only hold when both sides apply them.

Email and Digital Records Retention Capabilities

The outcomes centre on deciding which emails and files become records, where they live and when they leave.

- Assess which emails, chat messages and attachments qualify as records — the unit's capture decision
- Apply a functional classification to mailbox folders and shared drives — department heads
- Specify keeping periods and trigger events in a retention schedule — legal and audit advisers
- Design a disposal routine with approvals and destruction evidence — the records manager
- Weigh file formats against long-term readability and migration needs — IT and archive teams

- Build an electronic records retention plan for one unit — senior management

Key Email and Digital Records Retention Terms

- Record capture — the act of declaring an email or file a record and storing it with its descriptive metadata in a controlled location.
- Retention schedule — a document listing record classes, how long each is kept, the trigger that starts the period and its final action.
- Trigger event — the occurrence, such as contract end or staff departure, that starts the counting of a keeping period.
- Disposition — the final action on a record class at the end of its period, either destruction, transfer or continued keeping.
- Legal hold — a suspension of disposal for records relevant to an expected or current dispute, investigation or audit.
- Preservation format — a stable, openly documented file format chosen so that records remain readable after software changes.

Email and Digital Records Retention Day by Day

Day 1: Digital Evidence and Its Sources

- Records Concepts in ISO 15489-1 — Defining Evidence Value
- Mailboxes, Shared Drives and Collaboration Sites — Mapping Record Locations
- Duplicates, Drafts and Transitory Messages — Separating Records From Clutter
- Information Requests and Audits — Testing Retrieval Expectations
- Records Inventory Survey — Sizing Each Unit's Digital Holdings

Day 2: Capturing Email and Electronic Files

- Email Declaration Rules — Choosing Which Messages Become Records
- Attachments and Threads — Keeping Context With the Message
- Descriptive Metadata Fields — Supporting Search and Disposal
- Scanning and Image Indexing — Replacing Paper With Usable Copies
- ISO 16175 Functional Requirements — Specifying Records Software Capture

Day 3: Classification and Retention Schedules

- Functional Classification Scheme — Organising Folders by Business Activity
- Record Classes and Keeping Periods — Balancing Legal and Business Needs
- Trigger Events and Calculation Rules — Starting the Retention Clock
- Personal Data Minimisation — Limiting How Long Personal Records Stay
- Schedule Approval and Sign-Off — Gaining Legal and Management Agreement

Day 4: Disposition and Format Preservation

- Disposal Authorisation Routine — Approving Destruction Before It Happens
- Legal Hold Procedure — Suspending Disposal During Disputes
- Destruction Certificates and Audit Trails — Proving Lawful Disposal
- Preservation File Formats — Selecting Archival and Open Formats
- Format Migration Plans — Keeping Long-Term Records Readable

Day 5: Practising the Electronic Records Retention Plan

- Unit Inventory Review — Applying the Day One Survey
- Mailbox Capture Rules — Applying the Day Two Declaration Choices
- Schedule Extract for One Unit — Applying the Day Three Classes
- Disposal and Hold Calendar — Applying the Day Four Routines
- Electronic Records Retention Plan — Completing the Unit's Final Document

Applying Email and Digital Records Retention After the Course

- Run a two-week records inventory survey of one team mailbox and shared drive, using the capture rules from the course
- Draft a retention schedule extract for one unit's record classes and circulate it to legal and audit advisers for comment

Email and Digital Records Retention Questions FAQ

What is email and digital records retention and why does it matter now?

Email and digital records retention is deciding which electronic messages and files are kept, and for how long. It matters now because mailboxes and cloud storage grow daily, while requesters still expect evidence intact.

Which roles gain most from email and digital records retention training?

Records officers and administrative staff gain most, particularly those who manage team mailboxes, shared drives, scanning and information requests.

How does email and digital records retention training differ from a document control course?

It focuses on keeping and disposing of everyday electronic records, not on revisions, transmittals and approvals of project documents.

What do you bring back from email and digital records retention training?

You bring back an electronic records retention plan for one unit, covering inventory, capture rules, classification, keeping periods, disposal approvals and preservation formats. Examples come from healthcare and engineering firms.

Email and Digital Records Retention: The Way Forward

The electronic records retention plan becomes the reference a unit uses to decide which mailboxes and folders to clean up first. Records officers use it with IT administrators to set storage rules, and legal advisers use it when a hold is requested. After the first disposal cycle, revisit keeping periods against what was actually retrieved.