

Managing Your Email in Outlook

BEFORE migrating to Outlook

Clean-up the ROT: Changing email systems is a lot like moving house. You don't want to take unnecessary items with you, so reduce clutter in your In-box, Sent area and folders by deleting messages no longer needed for reference that are:

Redundant – incomplete correspondence threads; messages on which you've only been copied (cc'd)

Out-dated – resolved issues; completed activities, projects or transactions

Transitory – meeting invitations; one-off queries; event announcements

Also, identify and delete any email ROT lurking in folders on your H:, D: or C: drives. Move messages of continuing value to Outlook either into a top-level 'To Be Filed Later' folder or into existing folders.

AFTER migrating to Outlook

Determine your email management style. Are you a Piler, Filer or Deleter?

PILER:

- keeps all messages in Inbox and Sent areas
- may tag and sort selected items by type (Important or To Do) or by sender
- uses Search or Filter Message features to find relevant items
- rarely deletes items except when Inbox quota reached

Tip: If you're a Piler, identify common traits among items then file them into 3 or 4 'big bucket' folders, e.g.

ADMIN (day-to-day business, ongoing issues, work in progress)

PROJECT (one-off or time-limited activities, project work in progress)

REFERENCE (information-only, no action required)

FILER:

- uses folders and sub-folders to organize messages by subject, date, sender or other category
- keeps Inbox small by regularly moving actioned items to relevant folders
- deletes items from Inbox that don't fit into folder structure, e.g., lunch invitations
- may regularly clean-up folders by deleting outdate messages

Tip: If you're a Filer, build on your good habits by aiming for a zero-item Inbox. Supplement the existing folder structure by adding a REFERENCE folder for information-only items and a FOLLOW-UP folder for future action items.

DELETER:

- keeps Inbox small by constantly deleting items
- relies on others (assistants, direct reports, project team members) to keep copies and provide items when needed
- likely deletes items that are actually records of business transactions

Tip: If you're a Deleter, identify your Top 5 subjects and/or correspondents, create a folder for each and file items relating to decisions, negotiations, expenditures or issues into the relevant folder.

All Types:

- File related sent and received items together in the same folder to form a complete picture of a subject, issue or transaction. Click File/Options/Mail/Save Messages/When replying to a message that is not in the Inbox, save the reply to the same folder/Click OK.

Manage Attachments:

Emails often come with documents for your review, comment or editing. To preserve context, save the attachment to a folder on the network drive with the same name as the Outlook folder before filing the

message in Outlook. File items received with attachments that don't need any action in your REFERENCE folder or delete after reading.

Take Out the Trash:

Regularly move unwanted items to the Trash folder.

Cut the Thread:

Don't file every back and forth exchange on a subject. Wait until the matter is closed and file the entire thread at one time.

Establish Retention Periods Based on Business Value:

ADMIN: Keep for 2 years after receipt/sent date.

PROJECT: Keep for 4 years after receipt/sent date.

Note: Does not apply to engineering, construction or business development projects.

REFERENCE: Keep for 1 year after receipt/sent date.

PERSONNEL: Keep for 1 year after employee leaves college or moves to another department.

BUDGET: Keep for 2 years after receipt/sent date.

OPERATIONS: Keep for 5 years after receipt/sent date.

These are broad retention periods that coincide with the retentions established for similar but more specific types of commonly created College records.

For more information, go to the [Records and Information Management Policy](#) and the [Annual Year-End File Purge Guide](#).

Electronic Mail Use Tips:

Both the nature of electronic mail and the public character of the College's business make this form of communication less private than users may anticipate. These tips will help you use this important tool more effectively.

Time Management:

- To avoid distraction from other tasks, leave the new message alert feature turned off and set a specific time to check your Inbox and respond to messages.

Format:

- Always include an email signature based on the College's standard format when sending or responding to messages from your computer or mobile device. Outlook allows you to set a shorter version of your signature for replies from mobile devices, including smartphones.

Content:

- Make the 'subject' field clear, concise and informative.
- Restrict yourself to one subject per message. Start a new message thread when changing to a new subject.
- Keep messages brief and to the point. Always use proper grammar and spelling (even when emailing from a smartphone or other mobile device). Take time to proof-read and spell-check messages before sending.
- Be very careful how you express yourself; recipients can easily misinterpret a message's tone and language. Avoid capitalization, bolding, underlining, emoticons or exclamation marks to express yourself. Never use expletives or inappropriate language.
- A quick reply is not always the best reply. In many cases it is preferable to delay your response in order to send a thoughtful, informative message rather than replying immediately.
- Avoid sending replies that say only 'Thank you' or 'You're welcome' unless acknowledging the message in this way is appropriate.

Audience:

- Send emails only to those who need to see the message. Use the cc (carbon copy) option with care.
- Ensure your message's content is appropriate for all recipients either by listing recipients after you've finished the message or reviewing the list just before sending.
- When replying to a message sent to a number of people, select 'Reply' to send a message only to the originator or 'Reply All' to send the message to everyone. A reply to a message sent to a listserve defaults to all subscribers unless you manually address your reply to the originator.