Email Management Best Practice guide

Ways you can help yourself
Tired of having a crowded inbox? Drowning in a sea of emails? Keep getting “your mailbox has reached its limit” messages? There are a few quick and easy ways to help yourself manage your email
1. Delete irrelevant emails as soon as you read them
2. Make use of folders – don’t keep everything in your inbox
3. Microsoft Outlook 2007 has some great features that can help you organise your email
4. Put aside a regular time for email hygiene

Ways you can help other users
Remember that you are not just a receiver of email – some of it comes from you. There are ways to make your email cause other people less stress.
1. Use the subject line well
2. Use your out of office with alternative contact information
3. Send links rather than attachments where possible
4. Set messages to expire if possible

Ways you can help the QUT community
Massive inboxes are backed up on QUT servers and take up lots of space. Decreasing the amount of email traffic in general can help QUT’s systems run more efficiently.
1. Ask yourself – is email the best tool for this job?
2. Don’t use email for urgent communication
3. Be very careful about the use of Reply all
4. Email has a lifecycle – if the information needs to be kept – save it somewhere else

For information about Email Security
Visit the QUT IT Security Homepage
www.qut.edu.au/security

For information on the Technical aspects of Outlook and Calendar see the
QUT Outlook and Calendar Technical Guide

For information on writing effective email see the
QUT Email Etiquette and Style Best Practice Guide
More information

Ways you can help yourself

1. Where possible delete emails as soon as you read them
   • This includes meeting acceptances – you will still be able to access who has said yes and no if you need to
     o In your Outlook Calendar – double click on the meeting to open it

   [Image of an email with a meeting acceptance notification]

   Clicking on the “Tracking link will provide you with a list of who accepted and declined your meeting

   [Image of a calendar with meeting details]

   The number of acceptances and declines are shown under the tool bar

   • Unsubscribe from lists you no longer read – sometimes it is a good idea to unsubscribe even if you will be away for a long time
2. **Make use of folders** – don’t keep everything in your inbox

Not keeping everything in your one inbox can help you organise your emails and make them more manageable. As you go through your email act on those that are simple, delete those that you don’t need and transfer the ones that will take longer than three seconds to their appropriate folder.

- You could try:
  - folders based on tasks / functions
    
    Try mirroring the folder structure that you use on your personal drive or on shared drives.

    - Or based on work phase eg;  
      - Active / Reference / Archive
      - Defer / Delegate / Archive

    - Folders based on years might be useful for email that you wish to keep for longer

    ![Email folder structure example](image)

    You can go back and delete a whole year if you no longer need it.

    But remember, folders are **still** in your inbox.
    - They still affect the size of your mailbox
    - They aren’t accessible to others
    - Choose a simple system with a minimum of folders – it will be easier to manage
3. **Make use of the organising Features for Outlook**

Microsoft Outlook 2007 is in use across QUT – it has some great features that can help you organise your email.

- Set up a rule to send list emails or subscribed e-publications (etc) to a folder where you can read them all together at a regular time (once a day / twice a week)

**Steps**

- Create a new folder in your Inbox called “list emails” or similar
- Select rules and Alerts from the Tools Menu

![Select Rules and Alerts from the Tools menu](image)
There are lots of other great features available such as:
- Colour coding emails depending on who they are from, whether they are addressed solely to you, or whether you are just CC’d
- Automatically moving emails with certain phrases such as “FYI” to a certain folder

Check out Outlook Help and find some tricks that work for you

1. Select New Rule
2. Select Move messages sent to a distribution list to a folder
3. Right click on the “people or distribution list” link and enter the distribution list name eg “qut.staff@qut.edu.au”
4. Right click on the “specified” folder link and choose your folder from the list eg. “list emails”
5. Click finish
4. **Put aside a regular time** (daily / weekly - depending on your need) for **email hygiene**
It is also important to clean out your email regularly – don’t let it wait too long or it will become too much of a big task.

- Use Mailbox cleanup from the Tools menu

![Image of Microsoft Outlook Mailbox Cleanup]

**Using the Mailbox Cleanup**
You can sort or search for groups of emails that you may wish to store, archive or delete;

- Ones with large attachments
- Social emails from friends
- Emails where you are in the Cc field only

Depending on the types of emails that you usually get

- Don’t neglect cleaning out your sent items box!
Ways you can help other users

1. Use the Subject Line

The subject line of your email is how the recipient will identify the email later on – make it informative –

- Should be concise and meaningful.
- Should summarise the most important points of the message.
- Include phrases such as “For action” (if appropriate)

Some examples:

For action: Update your details in QUT Virtual
For approval: Request to attend Time Management Course
For comment: 2006 Communication Plan
Urgent: Need monthly report by Friday
Confidential: Applicants for Admin Officer position
FYI: Anne’s new contact details.

• When replying or forwarding, ensure that the subject still accurately reflects the content of your message. **Don’t reply to an old email when inquiring about a new topic!**

2. Use your out-of-office with alternative contact information

- Your out-of-office should refer to the person/ people/ departments which can be contacted for information in your absence

Example:

I am currently on leave until the 12 of November 2009
For information on Email Best Practice please contact Joe Bloggs (joe.bloggs@qut.edu.au)
For urgent email assistance please contact the IT Helpdesk (http://www.ithelpdesk.qut.edu.au/)

- This lets users know that you will not be able to act on their email and that they should contact someone else
- It also stops you coming back from leave to a long list of emails from the same sender
3. Send links rather than attachments where possible

Sending links rather than attachments not only reduces the size of your email, it adds some access protection to your document. You can choose from:

<table>
<thead>
<tr>
<th>QUT Fileshare</th>
<th>Network Drives</th>
<th>Collaborative spaces / SharePoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>For</td>
<td>Against</td>
<td>For</td>
</tr>
<tr>
<td>Files up to 680MB can be uploaded</td>
<td>Files only remain on Fileshare for 14 days</td>
<td>Files remain indefinitely</td>
</tr>
<tr>
<td>Choose who can access the file</td>
<td>Easy to access off campus</td>
<td>Files only remain on Fileshare for 14 days</td>
</tr>
</tbody>
</table>

For more information about QUT Fileshare, visit the Fileshare home page at: [https://fileshare.qut.edu.au/](https://fileshare.qut.edu.au/)

4. Set messages to expire if possible/relevant

- If a message is only going to be relevant for the next week or fortnight – for example information about an upcoming event – set the message to expire once the event has passed

On the message options tab select “more options”

Use the “expires after” function to send a message which expires after a certain date
Ways you can help the QUT community

1. Ask yourself - Is email the best tool for this job?
   - Are you emailing a document to be updated by multiple users?
     - Use a collaborative tool such as SharePoint
   - Are you putting out one-way information
     - Consider an RSS feed such as QUT news: http://www.news.qut.edu.au/cgi-bin/WebObjects/News.woa

2. Don’t use email for urgent communication
   - Pick up the phone; all QUT staff contact information is available via the Staff Directory: http://www.qut.edu.au/about/university/staffdir/
   - If you receive an email that needs more explanation – phone rather than end up with a long re:re:re:re:re:re: chain

3. Think about the audience of your email
   - Use To for all recipients who need to act on your email
   - Use Cc only when the email is for someone’s info (if they don’t really need to know don’t copy them in)
   - Don’t automatically Reply All
   - Be sparing with list addresses eg all staff, all TILS staff – if the email is only relevant to a few

4. Email has a lifecycle
   - If the information needs to be kept save it somewhere else
     - Use a network drive or collaboration site
     - Use TRIM where relevant
     - No one else can access old email in your inbox
   - If the information doesn’t need to be kept delete the email
   - Don’t reply to an old email when inquiring about a new topic

References:


