

Managing Your Email

The number of email items we receive every day, along with the ease with which they can be sent, duplicated, changed and deleted poses a number of challenges for us in our day to day work. The advice on this sheet is designed to suggest easier and better ways to find, use, share and keep email.

Benefits of managing your email

- You can access your email more easily
- You can keep your inbox under control
- You can share information with your colleagues more easily
- Communication, collaboration and storing information is easier within your team
- Your electronic records on the same subject are kept together
- You can retain evidence of your business decisions

Hints and tips for managing your email

Here are some tips to help lighten your load, use your time more efficiently, and empty your inbox!

Try to handle each email item only once by choosing one of the following options:

- ①  **Action now**
- ②  **Schedule** for action by moving it to your calendar
- ③  **Delegate** by turning it into a task and assigning it to someone (even yourself!)
- ④  **File** for future reference
- ⑤  **Delete** if it's not significant

Sending email

- Instead of sending a series of messages back and forth, make a phone call instead. Summarise your conversation in a single message if necessary.
- Use email for communications that must be kept. Use the phone for non-crucial matters.
- Create meaningful subject lines and try to limit messages to one subject per message. It makes filing easier.
- Use the "To" field for recipients who should act on the message, and the "Cc" field for those who are included for information only. (Consider – do they all really need to know?)
- Whenever possible, don't send attachments: send a link to the document in a shared drive.
- Where the subject of a thread of email messages has significantly changed, start a new message, copying only the relevant sections from the previous thread.

Accessing email

- Make sure your email account is accessible to at least one other staff member so that it can be checked during unexpected or extended absences from the office. Access to your account can be managed through the Account settings. Passwords should never be exchanged.
- To make it easier to store messages your area can have a shared mailbox with folders that mirror the folders that you use on your shared drive. A shared mailbox with the same structure is helpful for sharing messages in a team. (Refer to the: "Using a shared mailbox" section below.)

Storing email

- Personal mailboxes must not be used for long term storage of University information. Shared drives or shared mailboxes are more appropriate for the storage of University information.
- Decide at the time of creation/receipt if email messages are significant and need to be kept and then file them only after they have been sent.
- If messages have attachments, save both message and attachment together to preserve context.
- Save email items with other records relating to the same subject.
- Don't keep ephemeral material – especially messages with large attachments. Delete them (and don't forget the ones in the "Sent Items" folder).
- Empty the "Deleted Items" folder regularly. Consider setting up your email application to do this automatically each time you close it.
- Set up filters on all incoming email to automatically store them in appropriate folders.
- You only need to save the final message in an email thread. However, if the thread is long or the subject changes the email will need to be saved at significant points

Using Shared mailbox

Areas can set up a shared mailbox, with a folder structure the same as that in your shared drive, to be used by everyone in your team. When each person has access to the shared folders, they can drag and drop items into the relevant folders.

The benefits of using a shared mailbox include:

- There's less duplication - you only need to store email messages once
- You need less space for storage
- Everyone in the team can access the same collection of messages
- It's easier for you to find the email you want

Contact the CITS Service Desk to have a shared mailbox set up for your area. Records & Information Management runs a series of training workshops on managing information for Curtin staff, including managing your email and using a shared mailbox. For details visit the [Records & Information Management training web page](#).

Need assistance?

For more information please visit the Records & Information Management website at rim.curtin.edu.au
If you need assistance, please contact us by email at rim@curtin.edu.au