Work Smart: Managing Email

About Managing Email

Employees can receive up to 150 to 200 email messages per day. Learning to manage your email is important, especially if you are new to Kwantlen Polytechnic University and are unfamiliar with dealing with a large volume of daily email messages. Seeing email messages pile up in your Inbox can be stressful and frustrating. However, you do not have to let your email control you. Good email management is not about answering every email message immediately. It is about focusing on your commitments, completing your work, and making sure that you do not miss important messages and action items. This guide describes several tips and tools that will help you take charge of your email.

Topics in this guide include:

- Practicing Good Email Etiquette

- Managing Email Remotely

- Configuring Mail Settings

- Modifying Your MailTips Settings

- Cleaning Up Your Inbox with Conversations View

- Using Folders to Organize and File Messages

- Using Quick Steps for Common Tasks

- Searching for Messages

- Using Email Rules to Route Messages

- Working with Email Attachments

- Using Messaging Records Management (MRM) to Delete Messages and Folders

Practicing Good Email Etiquette

Keep the following in mind when working with email:

- Send an instant message instead of email if you a have quick question. You will likely get an answer more quickly, and you will enable your co-workers to spend time on other important tasks.

- Be very careful about clicking **Reply All** to messages that are part of a distribution list. Ask yourself whether everyone on the list needs to see your reply, or if you can narrow the recipient list to only those who you need to contact.

- Do not request removal from distribution lists by doing a **Reply All** to a distribution-list message. Instead, either use the provided link to unsubscribe or contact only the distributer of the message to find out how to unsubscribe.

- Use Messaging Records Management (MRM) to configure automatic aging out, or deletion, of older email messages and folders at dates that you specify. For more information, see the "Using MRM to Delete Messages and Folders" section later in this guide.

- Use Automatic Replies (Out of Office) if you will be away from your email for any length of time, whether it is for a few hours, a few days, or a few weeks. For more information, see the "Configuring Mail Settings" section later in this guide.

- Consider using an informal, personalized signature line only for internal email messages. Create a more professional, external signature line for email messages that may go outside the organization.

- Use the **High Importance** and **Low Importance** buttons in Outlook to classify your messages so that recipients can prioritize your messages easily.

Managing Email Remotely

You can manage your messages even when you are not sitting in front of your computer. To manage your messages remotely:

- Use Microsoft Office Outlook Web App (OWA), which provides secure access by using the Internet to access your Outlook email, calendar, contacts, tasks, and Global Address List. The Outlook Web App is available at http://webmail.kwantlen.ca. For more information, contact the IET service desk at 604-599-2116

- Synchronize Outlook on your mobile phone with your corporate email. For more information, visit the Mobile Device Synchronization form on https://our.kwantlen.ca/sites/iet/servicedesk/Lists/MobileDeviceActivation/Public%20View.aspx or contact the IET service desk at 604-599-2116

Configuring Mail Settings

You can use what Microsoft refers to as the "Backstage view" to manage your email. On the ribbon, click the **File** tab.

The **Info** tab contains several commands that were located on the **Tools** menu in previous Outlook versions. The following table describes the options on the **Info** tab.

Option	Description
Account Settings	Modify your existing email account or configure a new email account.
Automatic Replies (Out of Office)	Configure your mailbox to send automatic replies when you will be out of the office for a few hours, a few days, or a few weeks.
Mailbox Cleanup	Manage the size of your mailbox and clean up your **Deleted Items** folder.
Rules and Alerts	Configure your mailbox to act on incoming email, such as automatically moving messages to a folder or playing a sound when you receive a message. For more information, see the "Use Email Rules to Route Messages" section later in this guide.

Access Backstage View

- On the ribbon, click the **File** tab. To return to your Inbox, click the **Home** tab or click the Inbox image in the upper-right corner of the Account Information window.
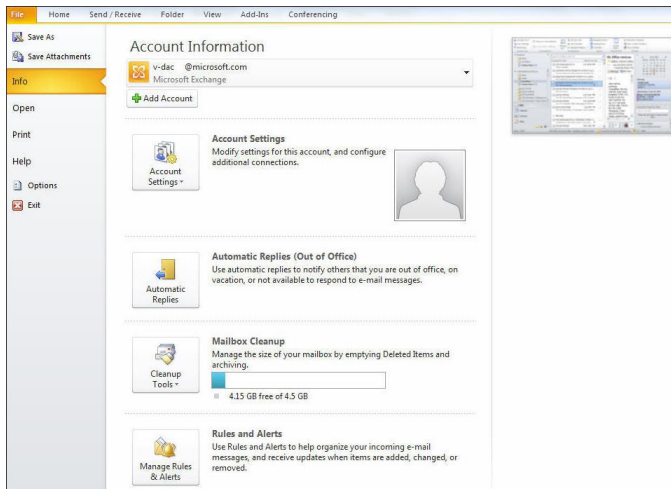
Modifying Your MailTips Settings

MailTips provides pop-up messages that let you know if your recipients are unlikely to respond—such as when they are out of office—and cautions you before you send email to a large distribution list or before you send intellectual property outside the organization. By default, the MailTips bar is displayed directly under the ribbon in the message that you are composing.

Modify Your MailTips Settings

1   On the ribbon, click the **File** tab, and then click **Options**.

2   In the **Outlook Options** dialog box, click **Mail**, scroll to the **MailTips** section, click **MailTips Options**, and then specify the desired options in the **MailTips Options** dialog box.
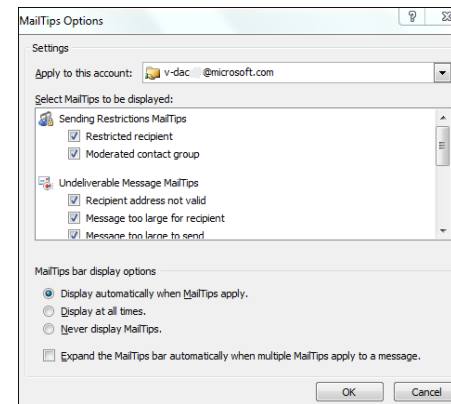
Cleaning Up Your Inbox with Conversations View

Use the Conversations view and tools to manage the volume of mail that you receive by removing redundant messages in a thread. You can then act on an entire thread instead of individual email messages. By default, the Conversations view is turned off.

Turn Conversations View On

- On the ribbon, click **View**, and then click **Show As Conversations**.

Delete Redundant Messages in an Email Thread

To reduce your mailbox size, remove redundant messages in your Inbox. For example, you can keep the latest message in a thread, but remove all previous messages. To keep your mailbox size down, keep only those messages that you truly need.

To remove messages in a thread:

- Right-click a thread, and then click **Clean Up Conversation** to remove duplicate messages. The first time that you perform this step, Outlook will prompt you to select the folder to which you want to move the redundant messages, such as the **Deleted Items** folder.

  –OR–

- Click **Ignore**, which is a blanket way to delete a thread. Doing this sends every message in the thread, including subsequent messages that you receive, straight into your **Deleted Items** folder.
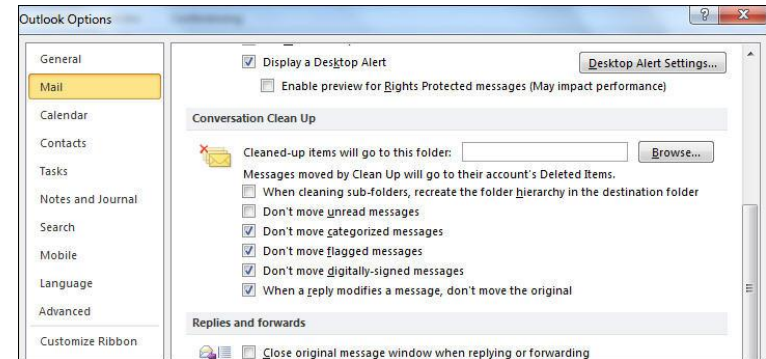
Note

You also can click a folder, and then click **Clean Up Folder** or **Clean Up Folder & Subfolders** to perform a broader deletion of threads.

Configure the Conversations Feature with Backstage

1. On the ribbon, click the **File** tab.

2. Click **Options** to display the **Outlook Options** dialog box.

3. Click **Mail**, and then under **Conversation Clean Up**, customize your settings.

4. Click **OK**.

Using Folders to Organize and File Messages

You can set up a folder system to group messages quickly by topic, project, sender, priority, and other categories.

1. On the **Folder** tab, click **New Folder**.

2. Type a name for the folder, select where you want to place the folder, and then click **OK**.
   The new folder appears in your list of mail folders.

3. When you want to put a message in that folder, right-click the message, point to **Move**, and then select the folder that you want to move it to. You can also drag a message to a folder.

Tips

- Create folders within folders for even more organization.

- Use email rules to route incoming messages into your folders automatically. For more information, see the "Using Email Rules to Route Messages" section later in this guide.

Using Quick Steps for Common Tasks

You can perform common multiple-step tasks with just one click by using Quick Steps. For example, you can use a Quick Step to categorize a message and move it to a folder with just one click. Outlook 2010 includes several pre-defined Quick Steps. Many of these pre-defined Quick Steps must be set up the first time that you use them.

Use a Pre-Defined Quick Step

1 On the ribbon, click the **Home** tab, and then in the **Quick Steps** group, select a Quick Step from the predefined commands.
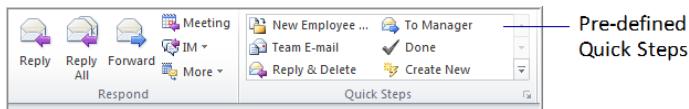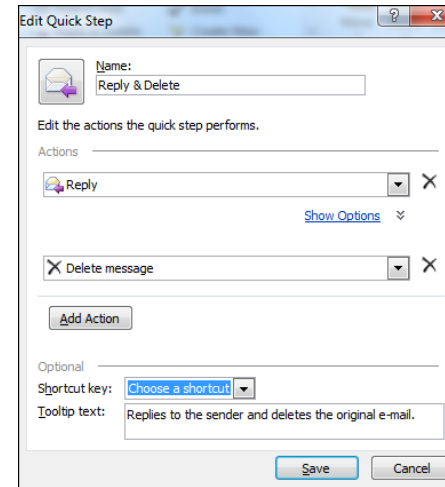

2 In the **First Time Setup** dialog box, select the actions that you want to take.

Modify a Pre-Defined Quick Step

1 Right-click the Quick Step, such as **Reply & Delete**, and then click **Edit <*name of Quick Step*>**.

2 In the **Edit Quick Step** dialog box, select the actions that you want, and then click **Save**.

Create Your Own Quick Step

1 On the ribbon, click the **Home** tab, and then in the **Quick Steps** group, click ⬓ .

2 Point to **New Quick Step**, and then select the type of Quick Step that you want to create from the list of common commands, or click **Custom**.

Searching for Messages

You can use the Outlook Search box or Search Folders to find specific messages in your mailbox.

Use the Search Box to Find Messages

The Search box enables you to find messages in your email folders that contain keywords or phrases, or that meet other search criteria.

To use the Search box:

- Click the folder that you want to search, and then in the Search box, type one or more words.

    The search engine immediately starts to look for messages that match what you type.
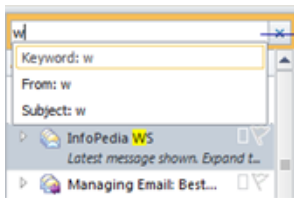
To remove criteria:

- On the **Search** tab, in the **Close** group, click **Close Search**. You can also just delete everything in the Search box to remove the criteria and return to a full view of your email.

Use Criteria to Narrow Your Search

You can narrow your search to specific criteria such as Keyword, From, and Subject. As you type in the Search box, a drop-down list of criteria appears briefly.


Note: The following section does not apply to thinclients. Refinement options are greyed out.

You can also narrow your search results by clicking criteria on the ribbon. For example, you can narrow your results to a particular week. When you build criteria using the ribbon, Outlook shows the criteria in the Search box.

The following graphic shows how you would pinpoint your search criteria to **This Week**.
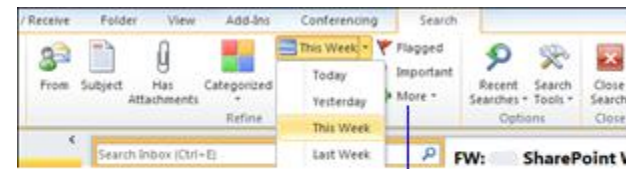
The following graphic shows how you would search for messages **From** someone specific during **This Week**.
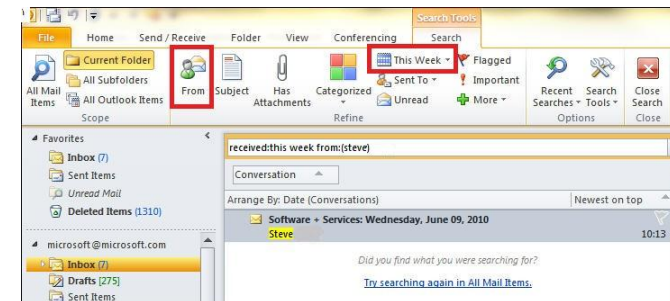

Tip

To perform an advanced search, in the **Options** group on the **Search** tab, click **Search Tools**, and then click **Advanced Find**. Enter additional search criteria in the **Advanced Find** dialog box.

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Use Search Folders to Find Messages

If you find that you repeatedly type the same information in the Search box, consider creating a Search Folder instead. For example, if you want to search for mail from a specific person, you can create a Search Folder that searches for mail from that person. The results show where messages from that person are stored in your mailbox. Whenever you want to execute that search again, just click the Search Folder.

Another example of a Search Folder that you might want to create is for all unread messages in which you are on the **To:** line and which are marked as urgent. When you check your email, you can quickly check this Search Folder to prioritize messages and related tasks.

There are five default search folders: **Call Logs**, **Categorized Mail**, **Large Mail**, **Missed Conversations**, and **Unread Mail**. For example, you can click the **Large Mail** Search Folder to arrange mail in your mailbox by size, with the largest mail items at the top. The default Search Folders are located beneath folders in your Inbox.
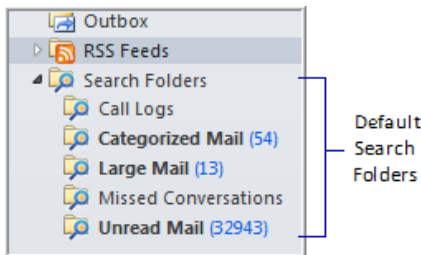
To create a new search folder:

1. On the ribbon, click the **Folder** tab, and then in the **New** group, click **New Search Folder**.

2. In the **New Search Folder** dialog box, click a predefined search folder or scroll to the bottom of the dialog box, and then click **Create a custom Search Folder**. Follow the instructions that appear.

    The new Search Folder is added to the Search Folders tree with the other default Search Folders.

Using Email Rules to Route Messages

You can route incoming and outgoing messages automatically by using email rules to establish prioritizing criteria. For example, you could create a rule that always moves messages from a particular sender to a particular folder. Rules fall into one of two categories: organization and notification. Rules only operate on unread messages.

For example, the following graphic shows how you would create a rule that sends all messages to the **Moodle Users Distribution List** to a selected folder.
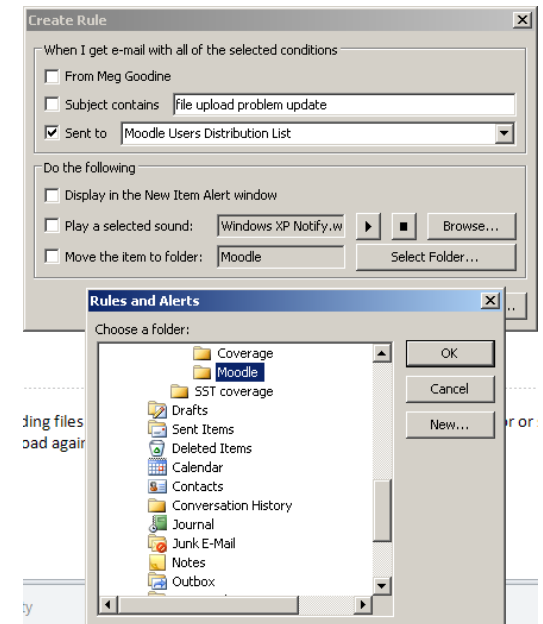
Create a Rule

1 On the ribbon, click **Home**, and then in the **Move** group, click **Rules**. If you have more than one email account, make sure that you select the Inbox to which you want to apply the rule.

2 In the **Rules** list, click **Create Rule**.

3 Complete the information in the **Create Rule** dialog box, and then click **OK**.

Notes

- To create a more advanced rule, in the **Create Rule** dialog box, click **Advanced Options**, and then follow the instructions in the Rules Wizard.

- If you establish a rule to move a distribution group's email thread automatically to a folder, but you rarely review those messages, consider removing yourself from the group (see the "Practicing Good Email Etiquette" section of this guide). Alternatively, you can use MRM to manage the folders that contain your distribution-group messages so that emails are deleted automatically based on their age. For more information, see "Using MRM to Delete Messages and Folders" later in this guide.

Working with Email Attachments

Storing email messages that have attachments can consume a lot of mailbox storage space. To free up mailbox storage space, you can save attachments locally to your computer or delete them.

View and Save Attachments

1 Click a message with an attachment, and then click the attachment to preview it in the Reading Pane.

2 Do one of the following:

- Keep the attachment with the message by doing nothing.

- To save a single attachment to your computer, right-click the title of the attached file, click **Save As**, browse to where you want to save the attachment, and then click **Save**.

- To save all attachments in a message, open the message, select one of the attachments, and then, in the **Actions** group on the **Attachments** tab, click **Save All Attachments**. In the **Save All Attachments** dialog box, select the attachments that you want to save, click **OK**, browse to the location where you want to save the attachment(s), and then click **OK**.

- To delete an attachment, right-click it, and then click **Remove Attachment.**

Important

Outlook limits the size of attachments that you can send to 10 megabytes (MB). However, just because you can send an attachment that large does not mean that you should. Be considerate of your recipients and try not to affect their Inboxes negatively. If you have to share a large file, store it on a Microsoft SharePoint® site, and then send an email message that includes a link to the site.

Using Messaging Records Management (MRM) to Delete Messages and Folders

Estimates indicate that email accounts for approximately 25 percent of an enterprise's storage demand. You will start to receive warnings when your mailbox size approaches its limit. Delete unnecessary email, and do your part to reduce the organization's email storage burden and compliance risk, and stay within your mailbox quota.

You can apply MRM to set expiration policies for individual messages and entire folders. This is especially helpful when you route distribution-list messages directly into a specific folder.

Set an Expiration Policy for a Folder

1   Open Outlook, and then select the folder to which you want to apply an expiration policy.

2   On the ribbon, click the **Folder** tab, and then in the **Properties** group, click **Policy**.

3   Select an expiration policy from the **Folder Policy** list.
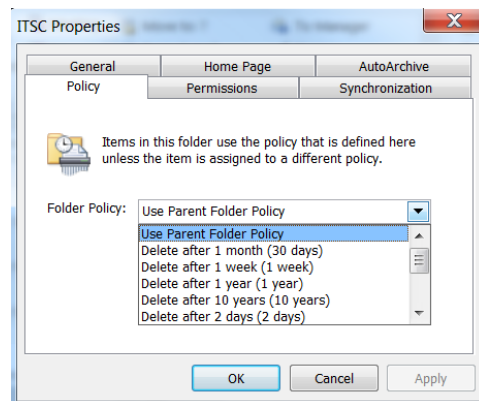
Set an Expiration Policy on an Individual Message

- Right-click the message in Outlook, point to **Assign policy**, and then click the appropriate **Retention Policy** for the message.

Notes

- You cannot set expiration policies on the default Outlook folders, including the Inbox, Deleted Items, Outbox, Drafts, and Junk E-Mail.

- Setting a policy on a specific message overrides any previous folder policy that you set.

For More Information

- **Outlook 2010**
  http://office.microsoft.com/en-us/outlook/