



Email Management : General Management Advice

How should I organize the email that I need to keep?

People use email in many different ways and for many different purposes, including as a communication tool, as a to-do list, and as a storage mechanism for keeping their messages. There are three main approaches to organizing your email messages that may help you use your email for these multiple purposes:

1) No filing strategy:

This strategy consists of creating no folders within your email software and keeping all emails in your inbox. People who choose this strategy often periodically remove emails from their inbox and save them offline in chronological folders in order to reduce the amount of server space they are using.

The advantage of such a system is that it requires little effort. The owner of the email is able to locate things because they may personally know when specific emails were received or can use a search engine to retrieve specific emails. Using the threaded messages feature, if your software has this, can allow you to see all messages relating to a particular topic.

The disadvantage is that over time, it may be more difficult to recall when you received certain messages, and thus difficult to retrieve them without subject related folders. It may also be difficult for your successor, your colleagues, or an archivist to make sense of your emails in the future. You may end up keeping more emails than you need to because you are not reviewing the emails and assigning them to topical folders.

2) Filing system:

The traditional way to organize records is to establish a simple filing scheme based on topical areas in order to bring together all documents on a particular topic. For some people, (such as those who deal with large amounts of similar documents) establishing a filing scheme is a successful way to manage your electronic records as well as your paper documents. This filing structure can incorporate your office's records retention and disposition schedule, if your office has one.

One advantage of a filing system is that it provides a complete view of all the emails on a

particular topic, regardless of subject line or sender. A topical folder provides a context for a set of messages that you would not necessarily see if they were all in your inbox mixed with emails of various topics. A filing system can allow quick retrieval of emails if you know what folder you put something in. It allows those who may access your email later on (a successor, colleague or archivist) to find emails and follow threads on subjects easily. Although you may not file every single email message, a folder system can greatly reduce the feeling of clutter in your inbox.

The major disadvantage of a filing system is that it takes time and discipline to maintain. Over time you may find that you need to review your folders and delete old emails, or modify the names of folders that you have created.

For more information about setting up a filing scheme, see the FAQ "How should I file my emails".

3) Combination of filing system and usage of inbox to store emails:

Research has shown that filing all messages is not necessarily an effective management tool for some people. If you receive a large amount of email (over 100 per day), spend a lot of time away from your computer, or just do not have the time to maintain an extensive filing system, you may want to consider a strategy in which you file some messages and leave others in your inbox.

If you choose this strategy, it is a good idea to first delete the emails that you know that you do not need or should not keep. If you delete these messages on a daily basis, you will be able to easily identify the messages that you do need to keep without having to weed through too many emails in your inbox.

File any emails that you know that you want to keep and that you do not have to follow up on. These may be emails that you want to keep as evidence of your activities or evidence of a business transaction. Depending on the content, these may be emails that you want to keep for a long time, or for a shorter period of time (such as class assignments that you may only want to keep for the semester).

After deleting and filing, the emails left in your inbox should be emails that you need to act upon or that you are waiting for some sort of resolution on. Some people find that creating a folder for messages that they need to follow up on works well. Others keep all of these emails that need resolution in their inbox. In some systems you can "flag" emails for follow up. For some emails, you may want to delete the email after the task has been completed, for others, you may want to file the email into your filing system.

You may find that one of these systems works for you, or you may use a combination of strategies to find a method of organizing your email that you are most comfortable with. These simple guidelines are suggested for the individual email user. If email messages are intended to

be stored on a network server, organization schemes and folder titles should be set up in consultation with system administrators and others accessing the network.

What should I do with copies of messages that I have sent?

Most email software packages automatically save a copy of sent messages into a "Sent file". While you may not have the time to go through your sent folder and file each message, if you have storage limits you may want to store messages from this folder offline. It is a good idea to remove messages with sensitive material in them, (personnel, etc.), by deleting them, moving them to a specific subject folder, or saving elsewhere offline.

A few email clients prompt you to decide if you want to save a copy of a sent message at the time that you are sending the message. If you use such a system, although you may not save every message, you may want to at least choose to save important emails. Some people choose to file sent messages in a specific subject related folder, but many people find that filing them in a centralized sent folder is the most useful record of what they have produced. This follows traditional archival and filing practice.

How should I file emails?

A good email folder structure is not just a way to keep the number of emails in your inbox low, but it is a structure that helps you keep, find and contextualize materials.

When choosing a folder title, it is important to use a name that accurately describes the messages you will file there (example: "travel requests and reimbursements FY 2003/2004"). Try to use consistent spelling and vocabulary that others can interpret if they need to. Avoid using obscure acronyms and abbreviations when possible. Check that your categories do not overlap. There are 7 types of names that you can give your file folders:

Type	Definition / Example	Reasons for Use
Geographic area or location	Travel Reports > England	Good for subfolders
Numbers or Symbols	NF-001	Can be brief, specific, indexable. May not immediately be apparent what they represent.
Dates	March 2004	Allows quick deletion of documents that can be deleted after a certain period of time. Can quickly sort messages by date and move into a folder.
Subject Topics (names, organizations, companies, projects, publications, etc.)	Budgets, Courses / Elem Chinese	Brings together all documents on a particular topic, regardless of subject line. Allows flexibility in overcoming erroneous subject lines.
Combo - Subject Date	Evaluations Spring 2002	Can take a large subject file and break it down into smaller time-based files.
Sender	John Smith	Can use to view all communications with a particular person, regardless of their email address.
Records Series	Annual Reports	Makes retention and deletion of documents identified in records schedules easy.

If your email software allows you to create subfolders, you might find this to be an easy way to organize emails on a particular subject that occur on a periodical basis. For example: your main folder may be Course Evaluations, with subfolders of Course Evaluations Fall 2002, Course Evaluations Spring 2003, etc.

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What should I include in the subject line of an email message?

You should include enough information to help the receiver(s) assess the message's value and importance and be able to find the message at a later time. In some cases, the receiver does not need to read beyond the subject line. It can be useful, particularly when working on group projects, to add within the subject line a designated word or abbreviation, which signifies that the message is pertaining to that project. For example: Website Committee: latest redesign. Here are some other examples:

Instead of	Use
Question	Question about project deadline
Please Review	Strategic Plan for your review
Meeting	July 1, 2004 Budget meeting confirmed

I've exceeded my space quota, what should I do?

You may be assigned a limit as to how much server space you are allowed to use for your emails. At UNC, you can check your space usage at <http://onyen.unc.edu>. When you exceed your quota, you should consider either deleting some emails or moving emails off of the server to other storage. Here are some tips for reducing the amount of emails that you are storing on the server:

- Delete any emails in your "trash" folder.
- Look through your inbox and delete any emails that you don't need. Check your records retention schedule, if your office has one, for guidelines on what you may be allowed to delete.
- If your email software automatically saves a copy of all of your sent messages, you may want to look at the "sent folder" and determine if there are emails that you can delete or save offline elsewhere.
- Review other folders and check for emails that you may no longer need to keep. If the emails are no longer necessary, it is frequently easy to delete folders that are organized by date or by sorting your emails by date. While you might be tempted to sort your emails by size and delete the largest ones, you should be careful not to delete important attachments.
- Consider storing folders of old emails that you do not use on a regular basis, but still would like to keep, offline (either on another computer drive or on disc).

Should I use this "archiving" feature that my email software has? How does that work?

Some email packages offer an archiving feature. Before using this feature, you should check your email software documentation or check with your IT staff to determine how this feature works for your specific software. Some email clients archive older messages (you can determine

what is considered "older"), by removing the messages from a centralized server and placing them on a local drive, usually in a proprietary file format. The user is able to retrieve these messages through the email client by looking in the "archive" folder. Most email clients will replicate the folder structure from your online filing scheme into this "archive" folder, thus one can maintain a standardized filing structure over time with little effort while removing older messages from your server space. A drawback to this approach to storing older messages is that subsequent email software may not be able to read your older files. If you archive messages you should check with your IT staff and make sure that your messages are going to a storage space that is consistently backed up.

I seem to accumulate a lot of email in my inbox. Do you have any suggestions for managing my inbox?

If you receive a lot of emails per day, it is easy for your inbox to become overwhelming. Some tips that help people manage a lot of emails in their inbox include:

- Delete some email messages immediately (spam, advertisements, informational notices)
- Rather than letting a large number of email accumulate, as you read each email make a decision about what to do with it. If you are overwhelmed by a large inbox, a filing strategy is probably a good idea for you. Many people find that if they file emails that they do not have to act upon and only keep those emails that require action or some sort of response in their inbox, they can more easily identify what tasks they need to accomplish.
- If a message documents or provides evidence that you need to keep, file it in an appropriate folder. (For example: correspondence with students over a semester)
- Be aware of when a message no longer has value and delete accordingly. There are some messages that you may only want to keep for a short period of time, such as meeting notices, or other messages of short-term value.

If you need to act upon an email message, you may want to either "flag" the message in your inbox, or store it in a "To-do" folder. Once you have acted upon a message, you should either delete the message or file it.

- Some people find reviewing their inbox or to-do folders at a specified time each week is useful.