

MANAGING YOUR EMAIL

The number of email items we receive on a daily basis, along with the ease with which they can be sent, duplicated, changed and deleted poses a number of challenges for us in our everyday work. This advice sheet has been designed to provide easier and better ways to find, use, share and store emails.

Benefits of managing your emails.

- It is easier to find information and to manage the number of emails you receive.
- 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 emails.

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:

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| 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 (<i>even yourself!</i>). |
| 4 |  | File for future reference. |
| 5 |  | Delete if it's ephemeral. |

Sending emails...

- Emails that relate to your role, to the business of the university and/or in correspondence with other staff and students of the university should be sent using a Curtin provided email address.
- Instead of sending a series of messages back and forth, make a phone call instead. Follow your conversation in a single message to summarise 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 emails...

- 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.
- Do not transfer university information to removable media (*i.e. CD, DVD or USB drive*) for transfer or long term storage. Deterioration and obsolescence can render these records inaccessible in the future.
- 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. Remember to save any email which has an attachment included as attachments often are not included in your reply.

Using a shared mailbox

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

The benefits of using a shared mailbox include:

- There's less duplication - you only need to store email messages once.
- Enables collaboration and delegation of responsibilities during leave or unplanned absences.
- It's easier for anyone in your team to find the right information.
- Ensures complete and proper evidence of decision making and actions taken.

Contact the CITS Service Desk for assistance with setting up a shared mailbox for your area.

Need Further Assistance?

If you require assistance, please do not hesitate to contact us via phone on 9266 7050, or by email at: rim@curtin.edu.au. For information management advice of a general nature, you may wish to visit our website at: rim.curtin.edu.au.

This advice sheet is made under and supports the [Information Management Policy](#) and associated [Procedures](#).