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MANAGING YOUR MAILBOX: TRIMMING AN OUT OF CONTROL MAILBOX

DEALING WITH AN OVERSIZE MAILBOX- WHY BOTHER?

It's amazing how many e-mails you can get in a day, and it can quickly become overwhelming. Before you know it, you have hundreds, even thousands of e-mails piling up – more than you will ever read. Some get properly filed, some get deleted, and some are just no longer relevant or needed.

But why does it matter to you that you have a ton of e-mails you don't need any more still in your mailbox? It matters because an oversize mailbox is less stable, less reliable and less responsive. It will be slower, it will be more prone to failure, and it will be more difficult to work with. If you find that you have to wait and wait after you open Outlook before you can begin working, it's likely your mailbox has become too big. A smaller mailbox will make your life easier, save you time and make you more efficient.

It also matters because there is a finite amount of storage space for e-mails in the firm's systems. It is simply not possible to store all e-mails that are ever received forever. Just as you do not keep every piece of mail that comes to your house, the mail servers cannot hold all of the millions of e-mails that come in every week. For this reason, each user is allocated a limited amount of mailbox space to use. It is up to you to make sure your mailbox stays within these limits.

CHANGE YOUR ROUTINE – FOLLOW THE “FOUR D’S”

The single most effective thing you can do to control the size of your mailbox is to make a conscious effort to think about how you deal with e-mail as it comes in. Rather than ignoring e-mails until you can get to them, make it a point to address them as they come in. Again, think of how you handle your mail at home. Junk mail goes straight to the trash; bills get filed for payment later, letters from family are opened and read, and so on.

The same logic applies here. When e-mails arrive, you should decide then and there (or at least each day) how it should be handled and do so. This will save you the unpleasant task of spending hours cleaning up an out of control mailbox later.

There is a set of easy to remember guidelines called “The Four D’s” that simplify this process:

- **Deal with it.** (Respond or file for reference)
- **Delete it.**
- **Delegate it.** (Forward)
- **Defer it.** (File it or Flag it for follow up)

Deal with it.

When an e-mail arrives, take the action that is called for. Respond to the sender, communicate with them, etc. If the e-mail contains an attachment that should be saved save it to the appropriate network location rather than postponing. (Do not use your mailbox as a document repository).



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Delete it.

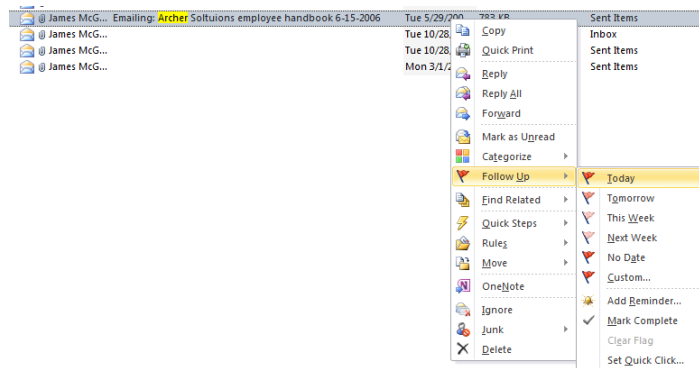
Many e-mails do not require action and do not need to be preserved. An invitation to lunch, a distribution list e-mail that does not directly pertain to you, a funny comment, an unsolicited advertisement, and any number of transient communications can and should be deleted right away, because there is no need for them in the future. Ask yourself- Is there any reason I would need to pull up this e-mail in the future? If the answer is no, then delete it right then and there. Deleting them as you see them saves you the trouble of sorting through them later to clean up. Remember that any e-mail that is deleted goes to your Deleted Items Folder, so if you accidentally delete something, you can retrieve it from there until you empty your deleted items.

Delegate it.

If an e-mail requires that someone else needs to take action, forward the e-mail to them. Note however, that if they already have documents that are attached, or if you have already saved that file to its proper location, there is no need to forward the attachment again. This saves everyone space and prevents variant copies of files.

Defer it.

It is not always possible or practical to address every e-mail when it arrives. Perhaps it is a request for action at a future date. Perhaps it is a complicated matter that will take some time to sort out. Perhaps more information is needed before action can be completed. When this happens, it is useful to flag it. You can do this easily by right-clicking on the message and choosing the appropriate flag from the "Follow Up" menu item.



CONTROL PERSONAL USE E-MAILS

It may go without saying, but personal e-mails should be kept to a minimum. Obviously, though there will be various e-mails that are non-work related that will be sent to your work e-mail address either by mistake or out of convenience. There is nothing wrong with corresponding on personal matters from your work e-mail so long as you adhere to company policy and remember that all e-mails on the company systems belong to the company and are subject to monitoring, review and storage. You should avoid using your work e-mails for confidential and private matters such as banking, medical matters, or other privileged information.

Also note that using your work e-mail for non-work purposes also increases the amount of e-mail you have to deal with at work and can increase your load. Further, movie clips, pictures, and other attachments can quickly eat up available space, so exercise judgment. You may need to remind some senders not to use your work e-mail.



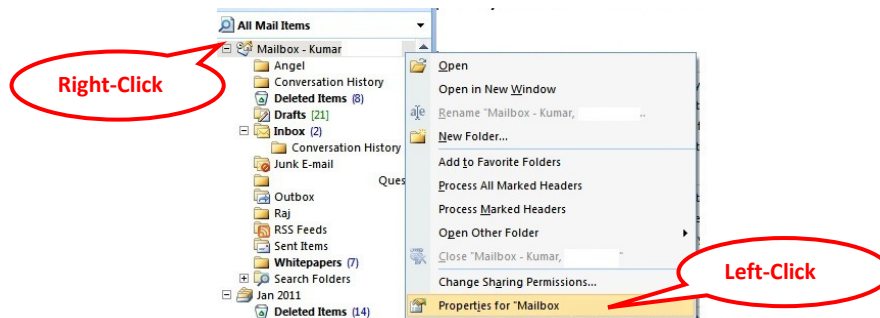
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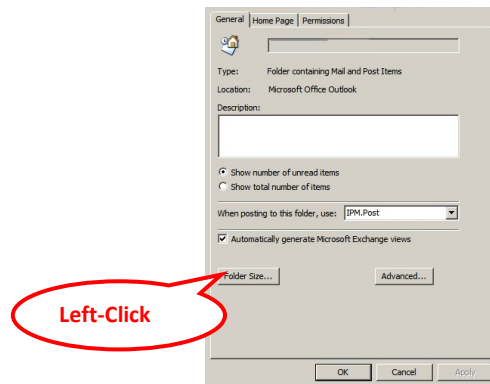
DETERMINE THE SIZE OF YOUR MAILBOX.

In order to know where the most work needs to be done, you must first know what the firm's limits are and how big your mailbox is.

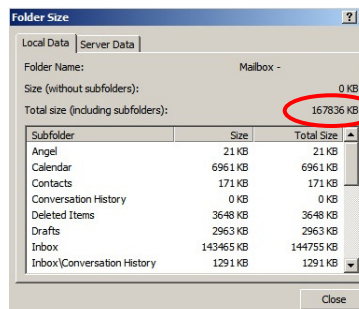
To see how big your mailbox is, Right-Click on the top level Mailbox. (This will often be titled with your e-mail address). This will encompass all of your various subfolders and give you the total size for your mailbox. From the drop-down menu, choose "Properties for...".



This will open the Properties Dialog box for your mailbox. Click the Folder Size Button



This will open the Folder Size Dialog Box. It will total up all contents of your mailbox and also show you how much exactly each folder in your mailbox is using, allowing you to focus your efforts on the folders that use the most space.





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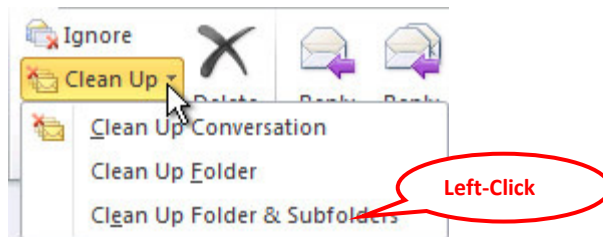
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USE THE CLEAN UP TOOL.

One of the most useful and effective tools for cleaning up your mailbox and eliminating redundancy is the Clean Up tool provided with Outlook.

Whenever you correspond with someone back and forth, Outlook keeps a copy of each individual e-mail, though each NEW e-mail in the conversation also includes the text from the previous e-mails. Obviously, this means a lot of redundancy. But it would be a daunting task to try to go through all of the previous e-mails and manually delete only the ones that have a more recent correspondence. The Clean-Up Tool automates that task for you!

With Outlook open, select a folder you want to Clean-Up. (You can go folder by folder, or you can run the tool against your entire mailbox.)



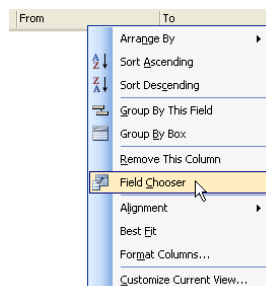
All Conversations in the selected folder and any folder that it contains are reviewed, and redundant messages are deleted. You should find that this dramatically reduces the size of your mailbox. By default, Cleaned-up items will go to the Deleted Items folder, so you have one last opportunity to review what has been cleaned out.

CHECK FOR LARGE ATTACHMENTS – SAVE ATTACHMENTS TO THE RIGHT PLACE

One of the most common culprits for very large mailboxes is very large attachments. Remember that if an e-mail contains an attachment that needs to be saved, then you should already be saving it to the appropriate network location rather than using your Inbox for document storage. Saving Attachments to the right place is one of the most effective ways to control the size of your mailbox.

But if you forgot, or some slipped through, it is useful to be able to easily identify them so they can be properly handled. This is easily done by using the Sort by Columns feature of Outlook.

First you will need to make sure you have a column for attachment size. Right-Click on the column headers and choose Field Chooser.

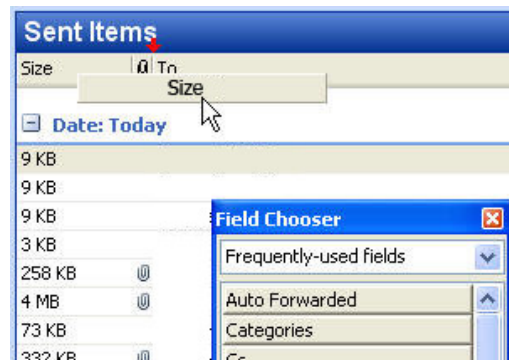




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From the Field Chooser list, just right-click and drag the Size column heading up to the column headers and insert it where desired. For instance, the Size field is dragged up, and placed between the From field and the To field and release. (Note the red arrows will pop up to help you insert between columns).



Size is now included as a column heading. Once this is done, simply click on the Size column header you created and Outlook will sort all your e-mails in ascending or descending order by largest to smallest size. Click it again to reverse the order.

Once you have finished identifying and handling large e-mails and attachments, simply click on the Received or other column header of your choice and return to your normal routine.

DELETED ITEMS IS THE TRASH, NOT A STORAGE BIN.

Anything that is deleted in Outlook goes to the Deleted Items by default. This provides you a safety net against accidental deletion, and so if you accidentally delete something, you can retrieve it from there (until you empty your deleted items).

A common mistakes people make in managing their mailboxes is to use the Deleted Items as 'storage of last resort' and keep everything there indefinitely. It should NEVER be used as any sort of document storage. It is the trash and anything in it is cleared to be thrown away. There is a reason the icon for it is a waste bin. Many mail systems will automatically clean the Deleted Items folder on a regular schedule to preserve precious system space, and when you put things in the Deleted Folder, you are notifying the system that it is trash and can be thrown away.

You would never store important papers in the trash can by your desk, because the cleaning crew will dump it. If something needs be preserved, then properly file it and store it.

E-mails kept in the Deleted Items folder count toward your total mailbox size, so it is important to remember to periodically empty your own e-mail trash bin. You can delete e-mails one by one in the Deleted Folders by selecting them and hitting Delete. This will permanently delete the e-mail. You can dump ALL of the items in your Deleted Items folder by right-clicking on the folder and choosing "Empty Folder" (you will see the waste bin icon next to it). This will permanently delete the e-mails and they will no longer count against your mailbox size.



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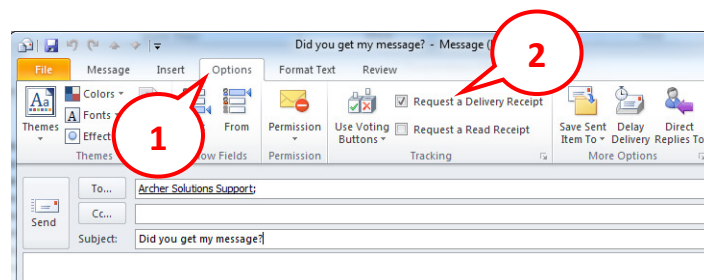
CHECK YOUR SENT ITEMS – NEVER SEND OR CC YOURSELF, HOW TO USE RETURN RECEIPTS

By default, whenever you send an email in Outlook or Webmail (Outlook Web Access), a copy of this email is kept in your Sent Items folder. This way, you always have a copy of any e-mails you sent out. That can come in handy for important correspondence, but just as with your Inbox, it can also accumulate a lot of obsolete e-mails. Be sure to periodically clear out your Sent Items to preserve space. You can use the Clean Up tool, Delete e-mails past a certain date, or manually remove ones you no longer need.

Oddly, some people will copy themselves on outbound e-mails so they have a copy. This is obviously redundant and means there are duplicates of the same e-mail in both the Sent Items and the Inbox, DOUBLING the amount of space taken, and duplicating effort.

Some people also mistakenly believe that this ‘confirms’ that everyone got the e-mail – it does not. It only confirms that you got it from yourself, it does not necessarily mean other recipients did.

If you need to get confirmation that your e-mail was delivered to the person you sent to, you should use the Return Receipt function of Outlook. With your e-mail open, Click the Options Tab and select “Request a Delivery Receipt”



This will generate a ‘receipt’ from the recipient’s mail server that your e-mail was successfully delivered to their mail server. Note that this does not confirm that your recipient actually downloaded or read the e-mail.

For that, you can also request a “Read Receipt” which will confirm that a recipient actually read your message, but note that not all mail systems support this, and the recipient often has the option to notify or decline to send you read confirmation.

REVIEW AND CLEAN OUT YOUR JUNK MAIL

Another common place where e-mails tend to accumulate and eat up space is your Junk Mail folder. With the ever increasing amount of spam and junk mail, it is inevitable that you will receive a lot of unsolicited e-mail that has no value. However, the anti-Spam filters aren’t perfect, so Outlook stores e-mails it has identified as ‘junk’ in a special folder so you can review it in case a legitimate e-mail is erroneously identified as spam.

Be sure to regularly review your Junk Mail folder and delete the spam often.



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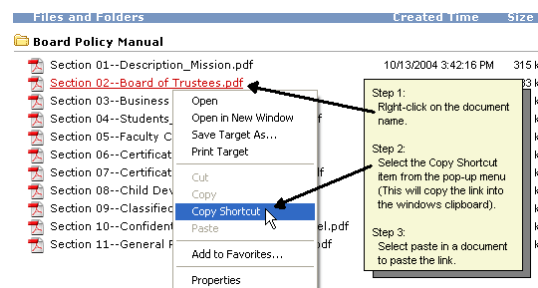
USE LINKS TO FILES INSTEAD OF ATTACHMENTS FOR CO-WORKERS.

When working on tasks and projects with your co-workers, it is often tempting to simply attach a document to an e-mail correspondence. It may seem 'easier' in the short term, but there are few reasons why this practice is actually counter-productive when the document is already available on a shared network drive or in a common system location.

- When the document is already available in a shared location, you are creating multiple copies of the same file and wasting mailbox space. There is the original document on the drive you copied to attach to your e-mail. Then there is the copy in the mailbox of everyone you sent the e-mail to, and if anyone responded with the attachment, then the file is copied again. Before you know it, a single file has been turned into a handful- maybe even dozens. And it's not just your mailbox, but your coworkers' mailboxes as well.
- You are also creating variant copies of the same file. When you work on a document and send it to three people, then those three people make changes and send it back to you, there are now five variant copies of the same document, including the original document. Six months from now will you or your co-workers remember which copy is the 'official' version?
- You can't update a file that has already been sent out. If you send a file and later realize that a change is needed, you can't update a file in someone else's mailbox. Your only option is to send yet another copy and hope that there is no confusion about which copy is the valid one.
- When a file is attached to e-mail, it has to be encoded to be sent in the e-mail. This encoding process causes attached files to become **1.37 times larger** than they were on your computer. For example, if you send a 10MB file through e-mail, you'll actually send 13MB of data.

When you are communicating with people on your own network, it is much better to simply send them a LINK to the file. This prevents wasted storage space in your mailbox and ensures that everyone is working on the same document, instead of variants of it. It will always be the latest, updated file.

The process is as easy as attaching a document! The only difference is that instead of attaching a document, when you navigate to the file you need, just right-click and Choose "Copy Shortcut". Then simply paste into your e-mail and you are done!



Note that this will only work for e-mail to your co-workers on the same network with access to the same directories and resources.



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SET ASIDE SOME TIME EACH WEEK TO DO HOUSEKEEPING

It can sometimes seem that keeping your mailbox under control is an unconquerable and daunting task. And if you have a badly out of control mailbox with thousands of e-mails, it can be quite a challenge. But that doesn't mean it is hopeless, and your life is certainly easier once you have a well-managed mailbox. It's also easier to KEEP it under control than it may be to GET it under control, so it's definitely worth spending the time. You likely also have mailbox quotas that require you to maintain a minimum size, so it's better to address it before it interferes with your work.

As you begin, it may be helpful to start with smaller, easily accomplished tasks and handle them one at a time. Set aside an hour or more if you can to take smaller bites out of an oversize mailbox. For instance, decide that this week, you will sort your inbox by attachment size and properly file the 50 biggest files. Maybe next week you will do another top 50. Maybe you will empty your Deleted Items, and the week after that you will empty out any Junk Mail more than 60 days old. Breaking up your initial mailbox clean up into pieces makes it easier to manage and gives you tangible results quicker. As you get more comfortable, you will get faster and more efficient. If you finish a task faster than you thought, do the next task in the time left over!

Once your mailbox is under control, it is a good idea to set aside a regularly scheduled time to focus on your mailbox maintenance, just as you might have time set aside to call on clients, follow up on projects, or organize your workspace. Even if it is only an hour a week, the regular schedule will help keep you focused and diligent.

Also remember that as you get better about the "Four D's" you will see your weekly cleanups take less time.