Email Management Challenge Introduction – University-wide Competition!

Stretch those fingers, it’s time to get your OSU email account into shape and learn some new tips along the way! This challenge will take approximately 12 minutes to complete.

In this series of email management challenges, we will explore the different types of transient and non-record emails you can delete from your OSU email account. The challenges will train you how to maintain your email in peak condition. The goal is to not just win this competition, but to equip you with hints and tips for managing your email point-forward.

Throughout these challenges, we will be collecting metrics on emails deleted as a percentage of the whole. Please be sure to fill out the surveys at the end of each challenge so we can tally up total emails deleted/gigabytes cleared and declare a unit/department THE WINNER!

Note: These challenges are based on the Outlook 2019 Desktop application. If you use Outlook 365 or iOS/Mac, follow the instructions designated for that version of Outlook.

Why is it important to manage electronic messages?

• Benefits to you:
  - Learn the types of emails you need to keep and those you don’t
  - Develop strategies for reviewing and deleting or filing your emails efficiently point-forward
  - Gain confidence to delete emails for which you are not responsible
  - Save time by locating only the emails you need
  - Expand knowledge of university records retention schedules and policies
  - Meet records management and security compliance standards for electronic records
  - Ensures your ability to respond to public records and litigation discovery requests in a timely manner
  - Improve organization in department file-naming and electronic filing structures

• Benefits to the university:
  - Decrease electronic storage usage
  - Decreases maintenance costs
  - Reduces cost of e-discovery preservation and production
  - Increases university’s transparency with the public
  - Adheres to federal, state and university laws and compliance standards

In other words, if you don’t manage your email, it will become sluggish and unhealthy!

The key to effectively managing electronic messages is to be proactive. Deleting transient and non-record emails allows the remaining small percentage of sent and received messages, that must adhere to OSU retention schedules, to be more easily managed on an on-going basis. Electronic messages should be managed similarly to processing “snail mail” at work and home.
Transient Materials are defined on The Ohio State University General Schedule as:
Non-substantive records of limited administrative value serving to convey information of temporary importance, sometimes in lieu of oral communication. They do not set policy, establish guidelines or procedures, certify a transaction, or serve as evidence or a receipt. Examples include drafts, notes, copies (not the official record), scheduling communications, and voicemail and telephone messages.

The Transient retention period is: not a fixed period of time, but is event-driven; should be disposed of after it is superseded by the official record or no longer needed.

What does this mean? It means that you are permitted to delete Transient messages from your email account once it is no longer of use to you! A Certificate of Records Destruction is not required to delete or destroy Transient materials.

Before you begin the challenges, record the Total Size of all folders in your email account.

Open the Qualtrics survey in a new browser so you can record the numbers in KB or GB as you go. (You will repeat this exercise for each challenge, but don’t worry if your folder sizes fluctuate with incoming mail, our goal is to attempt to decrease the folder sizes overall.)

1. In Outlook, right-click on your Inbox folder. Select Properties in the drop-down menu.

2. On the General tab, click the Show total number of items radial button, and then click the Folder Size button.

3. On the Local Data tab, make note of the Total Size (including subfolders) amount. Record the number in the Qualtrics survey.

DID YOU KNOW?

Additional tips and guidance can be found on the OSU Records Management website.
4. Repeat steps 1-3 for your Sent Items and Archive folders. [If your Archive folder is empty, record 0 in the survey.]

5. If you have not done so yet, enter your Total Folder Size amounts into the Qualtrics survey.

Display the total number of emails in your Deleted Items folder:
We will use this folder to track how many Transient emails you were able to delete, so the folder needs to be emptied before starting each challenge. [Note: only Transient emails or emails that have met retention should be permanently deleted. If you are unsure if emails in your Deleted Items folder have met retention, contact Records Management before emptying your deleted folder or continuing with the challenges.]

1. Right-click on the Deleted Items folder and select Properties, to display the total number of deleted emails:

2. Click Show Total Number of Items and Apply:

3. Now the total number will appear next to your Deleted Items folder. This will be useful for recording the number of emails deleted after each challenge.

4. Clear the Deleted Items folder by right-clicking on the folder and selecting Empty Folder.
Finally, review and update your search results setting before beginning the challenges:

1. Click the File tab.
2. Click Options.
3. Next, click Search.
4. Under the Results heading, confirm that the option “Current folder. Current mailbox when searching from the inbox.” is selected. (This will expand the search to include the Inbox, all subfolders, Archive, Sent Items, Drafts, Junk Email and Conversation History folders.)
5. Uncheck the box next to “Include messages from the Deleted items folder each data file when searching in All Items.” (This will exclude emails that you’ve already deleted from appearing in your search results.) Then click OK.

NOTE: If you have ever moved emails to the Online Archive, manually or set up an auto-transfer, repeat the challenge searches in the Online Archive folder, including the Archive and Deleted Items folder within the Online Archive.

Now, on to the challenges – let the games begin!