O365 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.

This version of the challenges is designed for iOS/Apple Mac users. The instructions provided use the Outlook web application, and any actions taken will sync with your iOS desktop application of Outlook. However, the functionality will vary from a non-iOS desktop application.

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!

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 storage usage 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 storage usage fluctuates with incoming mail, our goal is to decrease the storage usage overall.)

1. In Outlook 365, click on the gear icon in the top ribbon, then click View all Outlook settings.

2. Select General in the left menu, then Storage.

3. The total storage used is listed at the top and includes the Deleted Items, Sent Items, and Archive folders. Record the storage amount used in the Inbox folder Total Size field in the Qualtrics survey. [Record 0 for the Sent Items and Archive fields in the survey, since these numbers are already captured in the total storage usage.]

DID YOU KNOW?

Additional tips and guidance can be found on the OSU Records Management website.
View the total number of emails in your Deleted Items folder:
The Deleted Items folder needs to be emptied before the start of each challenge, in order to track the number of Transient emails deleted. [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 the Deleted Items folder and click the Empty Folder option, then click Delete All. This will zero out your deleted emails at the start of the challenge, so you can see how many new emails are deleted by the end of the challenge.

2. At the end of the challenge, right-click your Deleted Items folder and the Empty Folder option again. Record the number of emails deleted during the challenge in the Qualtrics survey.

Finally, review and update your search results setting before beginning the challenges:

1. Click the gear icon and View all Outlook settings again. Then click General and Search.

2. Under Search Scope, confirm the All folders when searching from the inbox radial button is clicked. (This ensures the search includes the Inbox, all subfolders, Archive, Sent Items, Drafts, and Conversation History folders.)

3. Under Search Results, uncheck the box next to Include deleted items. (This will exclude emails that you’ve already deleted from appearing in your search results.) Then click Save.

**NOTE:** If you have emails in the Personal Archive, repeat the processes in the challenges to clean up the Personal Archive folder, including its Archive folder and empty its Deleted Items folder.

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