

## **Email is serious Business**

**We can no longer take it for granted; we must take responsibility for managing our email**

Until recently (the last few years) email was looked as a convenience, a fun way to send communication, a convenient way to get information to someone when they might not be available directly. It has been a way to send photos to friends and relatives and a way to send funny jokes around the world in seconds.

Today, **email is how we do business**. Not only is it convenient, it is a requirement. If you don't have email and don't use it to finalize deals, make appointments, resolve disputes AND send photos and jokes, you must not be living in the 21<sup>st</sup> century!

Before the days of email, we did everything verbally, which we kept no record of or in writing, which we filed away in massive file cabinets to be saved forever, or until the file cabinet got so full we finally decided to clean it out. Now, what happens to old emails?

While email doesn't seem to take up any space, it does. It fills up our hard drives, our servers and our computer desktops. We think that because it is electronic, it will last for ever and we don't have to worry about it. Truth is, we generate so much more email than we did hard copy, management is even more important. Many emails come with attachments, sometimes the most important part of the email. Attachments can be word documents, pdf files, pictures, videos, etc. Each one takes up space, some more than others.

When Outlook was created, no one knew we would end up where we are today. The creators of the program decided that they would store all email, calendar, contacts, notes, tasks and attachments in one single database. This makes all of that information easily accessible, easily shareable in certain environments and easily portable. Unfortunately, given the recent history, it also makes it one very large file that is susceptible to damage. All of that information in one file is very vulnerable to problems, the larger the database, the bigger the problem.

Bottom line is this. If we agree that email is the way we do business today, we must take responsibility for managing it. It would be irresponsible to leave it to the developers of the software or to chance. There are multiple day seminars offered for many thousands of dollars just on the subject of using Outlook efficiently. In a nutshell, they say this:

- **Use your inbox as a "to do" list not a filing system, try to keep it empty.**
- **Delete emails that you don't need. And delete your deleted items.**

- **File emails that you need to keep in a way that makes sense to you.**
- **Do not use your inbox or sent box as your address book. If you want to keep an address, put it in your Contacts**

There are many different opinions regarding storing emails. One is, just keep buying bigger computers with larger hard drives and let your email folders grow forever. That really does not work. Eventually, your email program will slow down to a crawl because it is being required to keep track of all of those emails and a simple search will take unacceptable amounts of time. Another, is to bury your head in the sand, wait until your system crashes, lose everything and then, just start over. The most sensible practice, make a commitment to understand and deal with your emails. Take some time and learn to manage them now, before they get any more out of hand. Once you make the commitment, and clear up the back log, the effort is minimal.

I am going to present you with three very different methods of archiving. You should think about how you use email, what you might need from it in the future and maybe even test the alternatives to see what is most comfortable for you.

First, you can purchase a very expensive piece of hardware which, if you have your own exchange server, will archive for you. I will leave this solution to another discussion because it is not particle at this point in time for most people.

Second, create a personal filing system, outside of Outlook, by subject or client or whatever other criteria makes sense to you. This forces you to deal with each email and make a decision to store it or delete it. All you have to do is open an email, click on **File, Save As** and navigate to the folder you want to save the email in, give it a name or accept the one already there (it will be the subject of the email), or accept the one that is there and add a date to it, and click **Save**. Your email is now saved in a logical location. Now, you need to go back to Outlook, save the attachment, if there was one, somewhere equally as logical and delete the email. This does take some discipline but the result is a very efficient email system and a logical organization of all of you email. And, if you work in a corporate environment and you have a network, you can store these emails in shared folders on the network so that everyone's email about a particular subject can be in one place.

Third, and the most likely, use Outlook's built in Archiving capabilities. Archiving is really quite simple. Outlook has built in capabilities that allow you to select a date or a time period. Outlook will automatically, on a regular schedule, put emails that fall below the chosen criteria into a separate archive database. By doing this, you are removing some of the load from Outlook, taking items off of your (or your email provider's) server and storing them in a format that Outlook can still read. It is important to understand the process, the location for the archive files and the consequences of your decisions.

Archive files, just like the email database itself, is a single database. If you have made the decision that you want to keep email forever, then archive files must be managed as well so that they don't get too large to handle. One way to manage archives is to create a new archive file each year, learn how to access it and store it in a place that you can find. By default, archive files are tucked away on your local hard drive in a place that is difficult to find. That is just Outlook's initial decision and it can be changed. ***Archive files can easily be stored on a network drive so that they are backed up with the rest of your network data and/or a small portable hard drive or flash drive so that if you have Outlook running in multiple locations, you can still have access to old emails.***

How to get started.

First, organize your Email folders if they aren't already. Figure out a filing system that fits the way you operate. Create mail folders for each client or each subject area that is important to you. Sort your inbox by who the emails are from. Go thru the mail and move them in groups to their proper folders, skim each email as you go thru and delete the ones that you won't ever need.

Now setup archiving.

***A word of caution:*** If you are using a remote Exchange Server and have Outlook setup to run on several computers in multiple locations (a great feature of the Remote Exchange Server) you should only setup archiving on one computer. As a matter of fact, you should turn it off on the other computers once you have decided which one is your main computer.

I would suggest that you break all of your email into pieces. Years would be the simplest. Multiple years would be okay if you prefer just to get the task over with to get caught up. Once you get caught up, years is the easiest to maintain. For purposes of this discussion lets assume that we will group by years and we will begin with 2005. Here are the steps in a logical sequence without details. Later, I will give you step-by-step instructions.

- Set your archive settings to store anything older than 1/1/2006, include all folders.
- Activate archiving and keep an eye on the status bar in the lower right corner of Outlook to see when it is complete.
- Close Outlook.
- Navigate to the location of the archive file. Rename it to be your email address plus the ending date of this file; example marc123105.pst. Be sure to keep the .pst extension that Outlook gave it, otherwise, Outlook will not be able to open the file later.
- Decide where you would like to store this file, either on your local hard drive, an external hard drive or a network location, or a combination of two

or more. DO NOT STORE YOUR ARCHIVE FILES IN YOU'RE MY DOCUMENTS FOLDER, this will cause problems later on.

- Move the archive file you just renamed to the new location.
- Go back to Outlook and change your archive settings to be 1/1/2007, run the archive again, wait for it to complete, go to the file, rename it, move it and do 1/1/2008. I think you get the picture.
- Once you've caught up to the current year, you are in maintenance mode. Simply go back into your archive settings, set it up to archive anything older than 6 months and to do it on a regular basis.
- Your main Outlook database will remain manageable, you will know where to look for your archives and moving from year to year will be a piece of cake. You should be creating a new Archive file on July 1 of each year. Next year on July 1, force the archive to run so that it is up-to-date, rename and move the file. Now you have a system, just keep it going.

Now, you have all of those archive files, how do you look at them? In Outlook, simply click on **File, Open, Outlook Data File**, navigate to the location of your archive files, find the one(s) you want to open and you're there. You can search these archive folders the same as your active folders. You can reply to emails in archives and you can print things out or copy them to other folders. As long as you are in the archive file, you have full functionality, but once you leave it and go back to your current Outlook database, the archive file is closed and Outlook does not have to deal with the added overhead.