

## HOW TO ORGANIZE YOUR INBOX

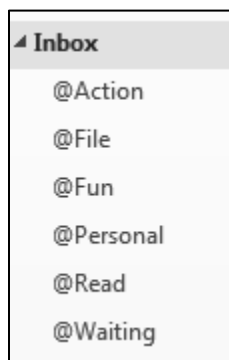
This brief is a continuation of the RIB [How to Clean up Your E-mail Inbox](#). It discussed deleting transitory email from your inbox – the following concerns how to manage the emails you were couldn't delete.

The objective is to identify and segregate the emails that you need to do something with from the emails that are finished with but you need to keep, and to keep those latter emails in a manner that allows them to be shared appropriately and disposed of when the time comes. Remember: these are University records and must be treated as such – in line with the University's Records Management Policy.

The first step of organizing your inbox is to create these six main folders:

1. **@Action** – This folder is for emails that you can work on now – if it will take less than 2 minutes do it now! – otherwise put them here.
2. **@Waiting** – This folder contains emails that are waiting for a response/waiting for someone else to complete work on before you can complete it (a lot of items from your Sent folder can go here).
3. **@Read** – This folder contains emails with materials to be read or looked at (like articles or weblinks), but does not contain any actionable material.
4. **@Personal** – This folder keeps any personal emails separate from work emails.
5. **@File** – This folder contains all the emails that need to be kept but no longer need action; it acts as a holding place for emails that are ready to be moved elsewhere.
6. **@Fun** – This folder is simply a place to keep nice things that you would otherwise feel obligated to delete, like an effusive thank you message, or something that made you smile. Everyone needs a pick me up, and there's no point in otherwise deleting something lovely, even if not strictly useful.

Note: The '@' is placed at the beginning of each file folder name so that these six folders will always be at the top of the list, and therefore easy to find.

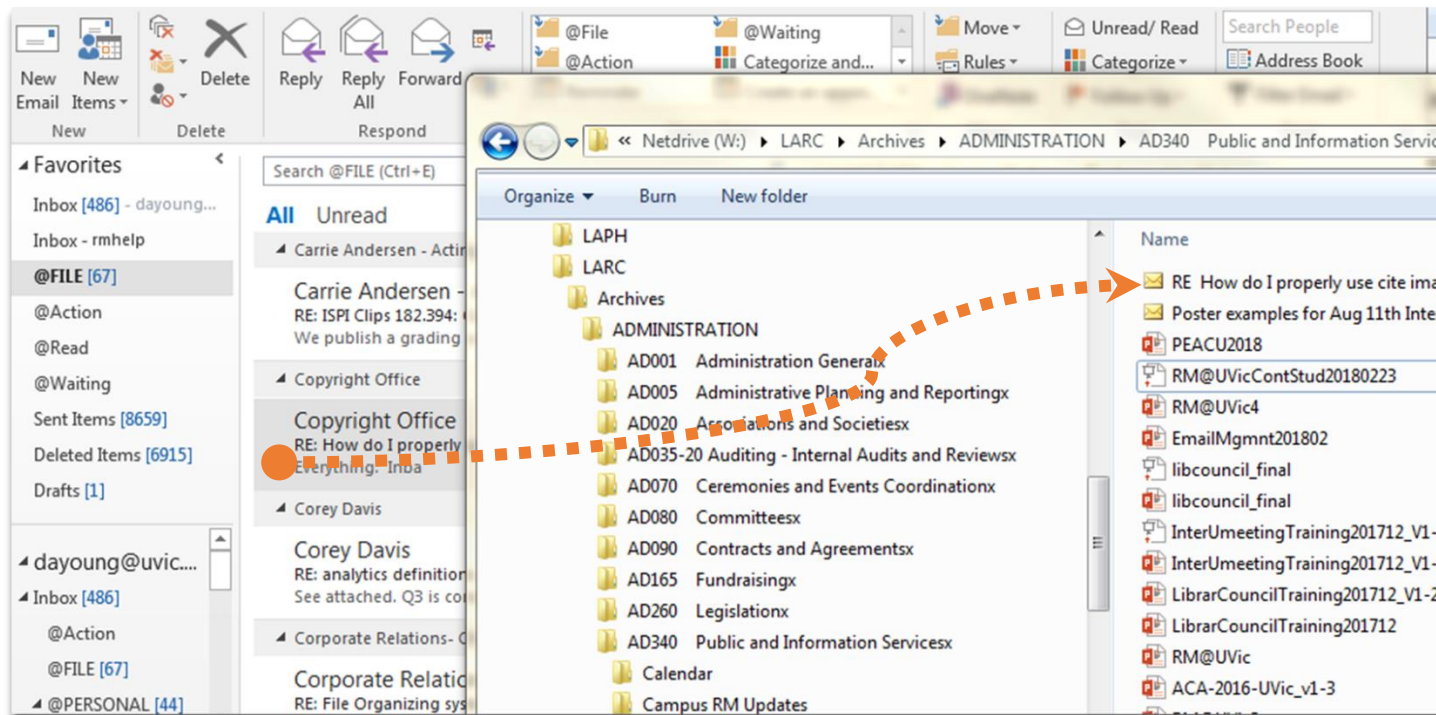


You may end up with some additional folders, but the majority of your emails should fit into these six categories. After implementing these folders it is possible for your inbox to be at zero.

You should typically be pulling emails from the @Action folder once they have been completed (assuming they shouldn't just be deleted).

Bear in mind that each of these folders has the potential to be an “out of sight, out of mind” graveyard. Therefore you do have to regularly review the contents, especially the @File folder. That one is the equivalent of the “to be filed” pile of paper you used to have sitting on your desk. From the @File folder it is easy to drag and drop any emails that need to be shared and saved into an organized space such as your Shared or Departmental drive, or a Connect (SharePoint) site.

Organizing the repository by the Directory of Records Classification structure enables application of the retention rules (which are allied to the classifications) and also provides a function-based arrangement of the records that is common across campus and intuitive (making navigation easier).



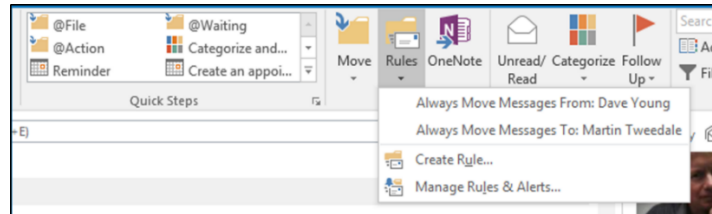
Alternatively, you can establish the folder structure in Outlook. This has the advantage of enabling the retention rules, but doesn’t put the email in a shared environment.

### Useful Tools in Outlook

There are many features or tools in Outlook that can be used to help streamline the organizational process; one of them is *Rules*.

Outlook Rules allow you to create automatic procedures for incoming emails. This will help keep your inbox organized with minimum effort.

On your menu bar look for 'Rules':

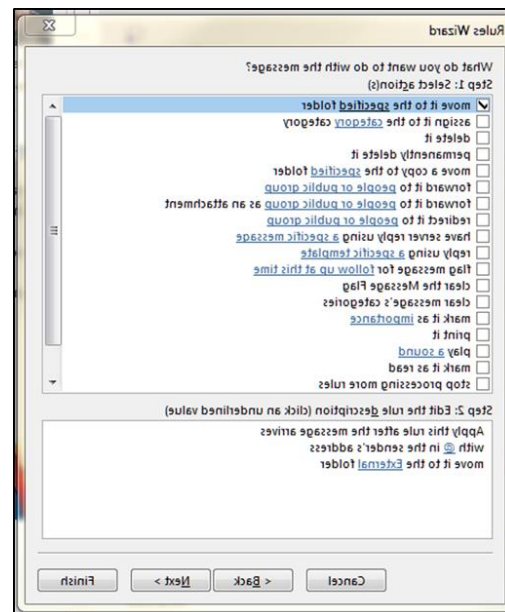
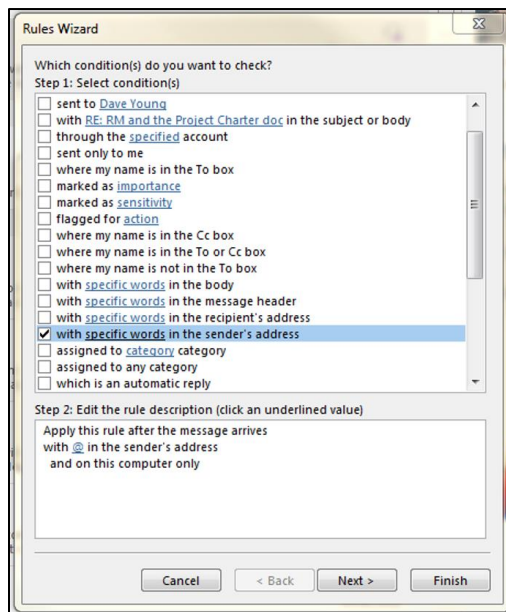


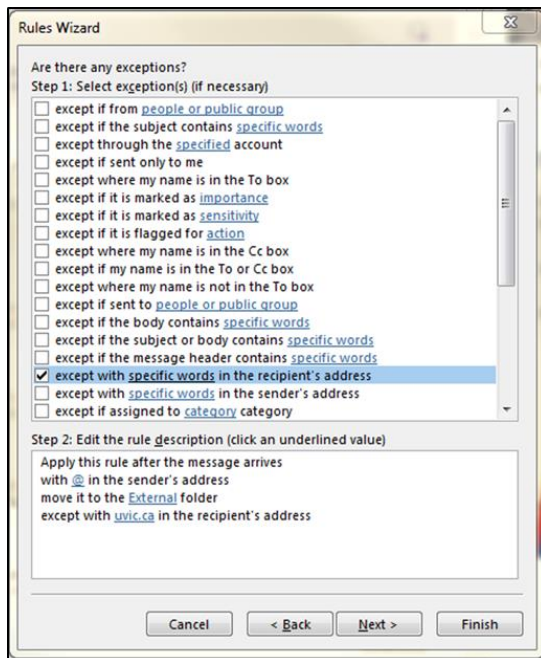
Rules → Create Rule → Advanced Options → Fill out the different conditions → Finish

When creating a Rule, Outlook will prompt you with what are essentially three basic questions:

1. Which conditions do you want to check?
  - Outlook is asking you to describe the type of email you want the rule to apply to.
2. What do you want to do with the message?
  - This section wants you to tell Outlook what exactly it should be doing with the previously described email.
3. Are there any exceptions [to the rule]?

These queries are found in the following three images:

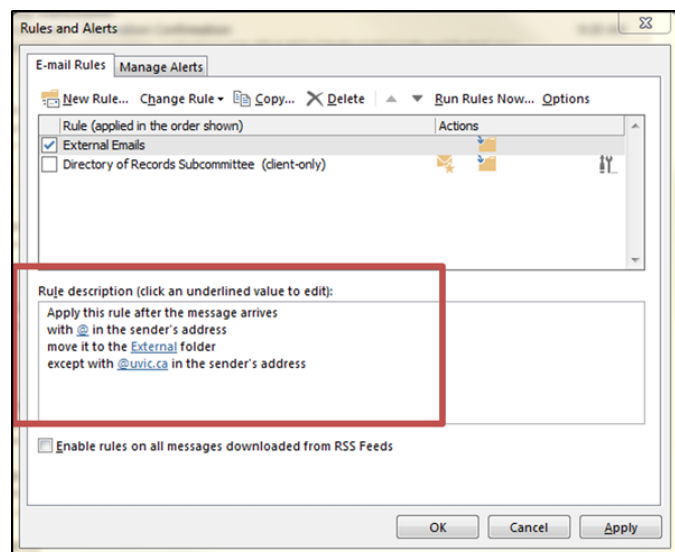




For example: (See the image below)

1. Conditions = any email with '@' in the address
2. Rule Description = send the specified emails to the file folder labelled "External"
3. Exceptions = Do not apply this rule to emails that have '@uvic.ca' in the address

→ These conditions mean that any email coming from outside UVic is rerouted directly into the folder titled "External."



If you are unsure how to use Outlook Tools, a good resource is [here](#), Lynda.com, or YouTube. **If you are concerned about your implementation of the organizational system, contact us at [rmhelp@uvic.ca](mailto:rmhelp@uvic.ca).**