Records Management Guidance

Outlook Tools for Email Management

This guidance provides some tools within Outlook that can be helpful for managing email records.

Tools for <u>sending</u> emails	**Contact Groups** – timesaver when emailing the same group(s) of people – **Page 2** **Links** – sending links to items instead of attachments – **Page 3** **Save Sent Item To** – automatically saving the sent email to a subfolder – **Page 4**
Tools for <u>managing</u> emails in Outlook	**Rules** – can be used to automatically file incoming email into subfolders – **Page 5** **Categorize** – can be used to "tag" emails with, which can help with managing them and/or filing – **Page 6** **Empty Deleted Items** – either manually delete the deleted items or set a rule so they automatically delete/empty – **Page 7-8** **Arrange by** – sort emails by date, subject line, type of email, to/from, etc.; which can help when moving to subfolders, filing to CM or identifying transitory emails – **Page 9** **Show as Conversations** – groups emails by conversation rather than traditional arrangement – **Page 10** **Quick Steps** – can be used to perform various functions (deleting, moving to subfolder, tagging, etc.) with a quick click of one button – **Page 11** **Search Folders** – can be used to create folders of search results – **Page 12**
Tools for <u>filing</u> to Content Manager	**Appointments** – can be used to schedule dedicated time for filing – **Page 13** **Tasks** – can also be used to schedule dedicated time for filing or other actions – **Page 14** **Outlook Setting Change** – is useful to avoid error messages when filing to Content Manager – **Page 15** For instruction on **how** to file to Content Manager, refer to Content Manager (CM) Job Aids.

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05/2022

1 of 15

Records Management Guidance
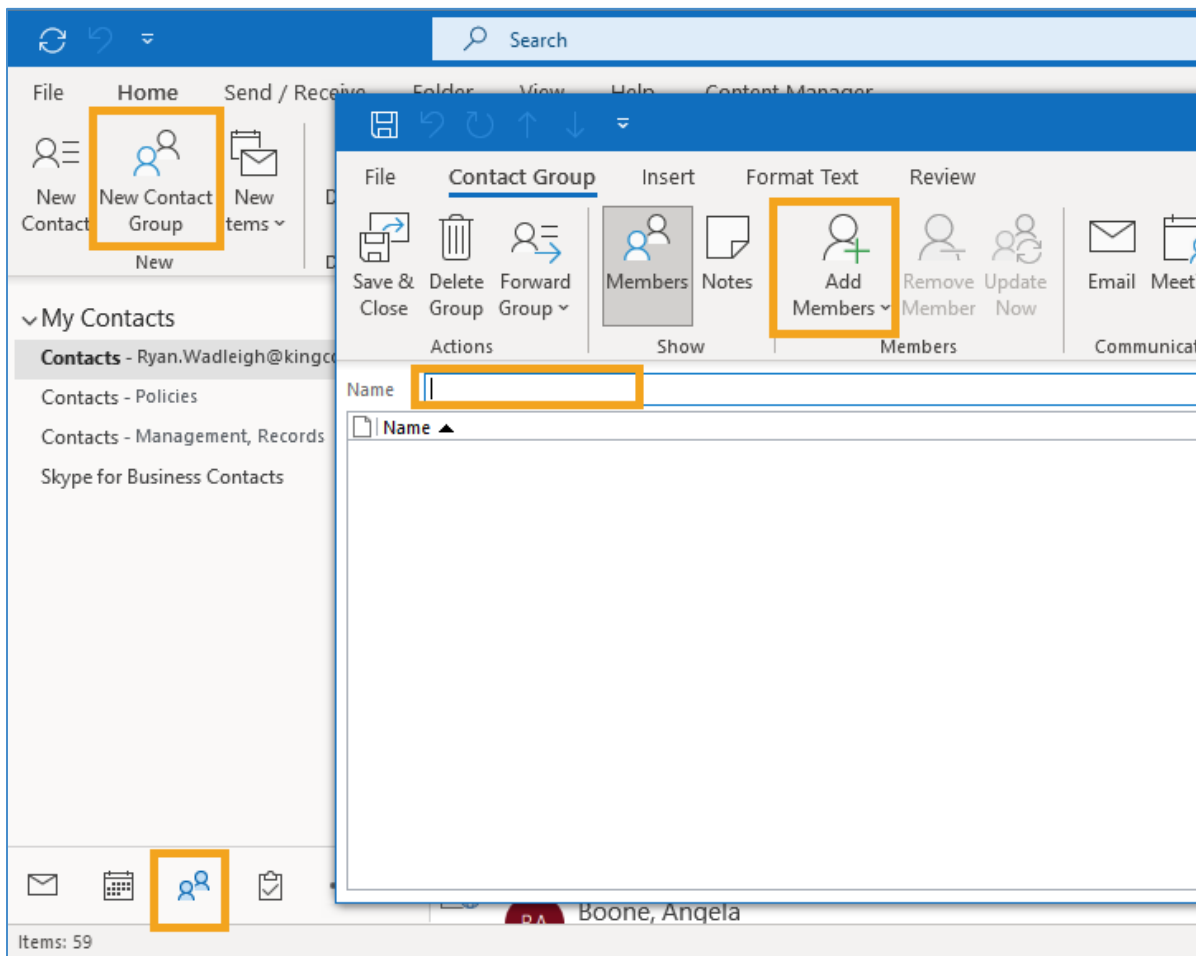## Outlook Tools for Email Management

Contact Groups

This is a helpful timesaver if you frequently email the same group(s) of people.

1. Click **Contacts Icon** (bottom left corner)
2. Click **New Contact Group**
3. **Name** = enter a name for the group
4. **Add Members** = use to add people to the group

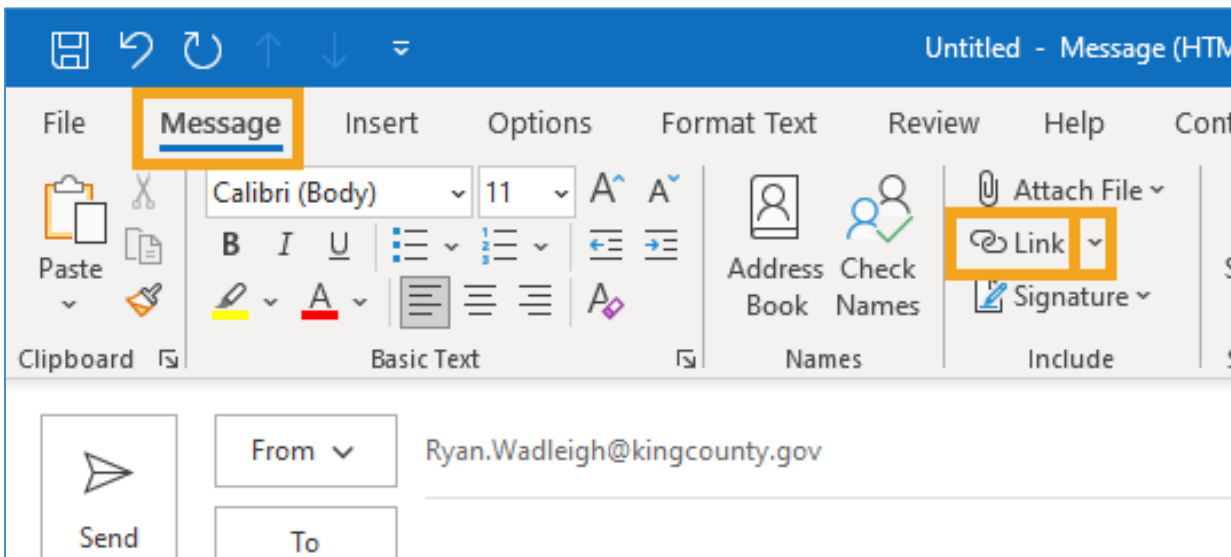Then, when creating a new email, enter the group name rather than individually adding names.

RECORDS
MANAGEMENT

Links

It is good practice to send **links** to records (especially in SharePoint, Teams or OneDrive), rather than including them as **attachments**.

1. Open a new email to send and click the **Message tab** and then **Link**
2. Click the **down arrow** to choose from recent items <u>or</u> click the **Link button** to paste in a url (including link to a document in SharePoint or Teams)

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05/2022

3 of 15

Save Sent Item To

This can be useful to move your sent email directly into a particular subfolder, *instead of* it going to the "Sent" folder.

1. Start a new email, **Options tab** and then **Save Sent Item To**
2. **Other Folder** and then locate and choose an Outlook folder to save to.
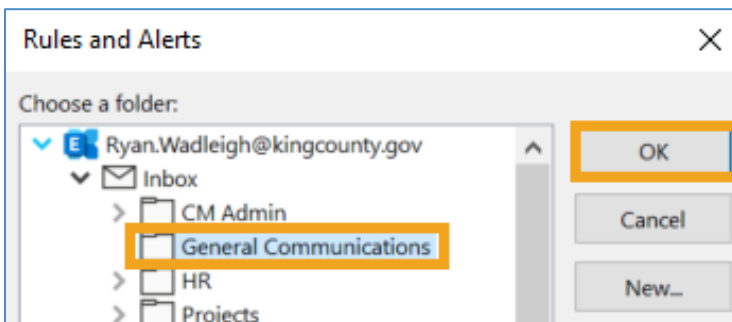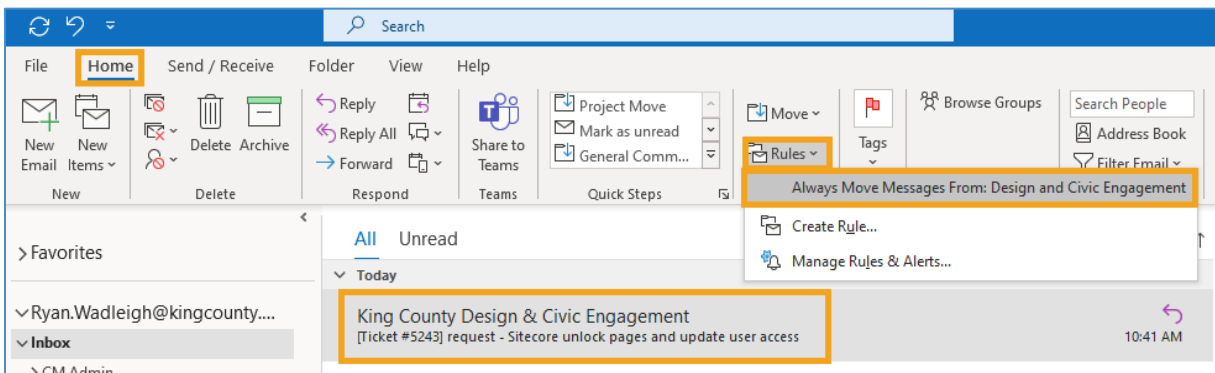3. Finish and send email as usual
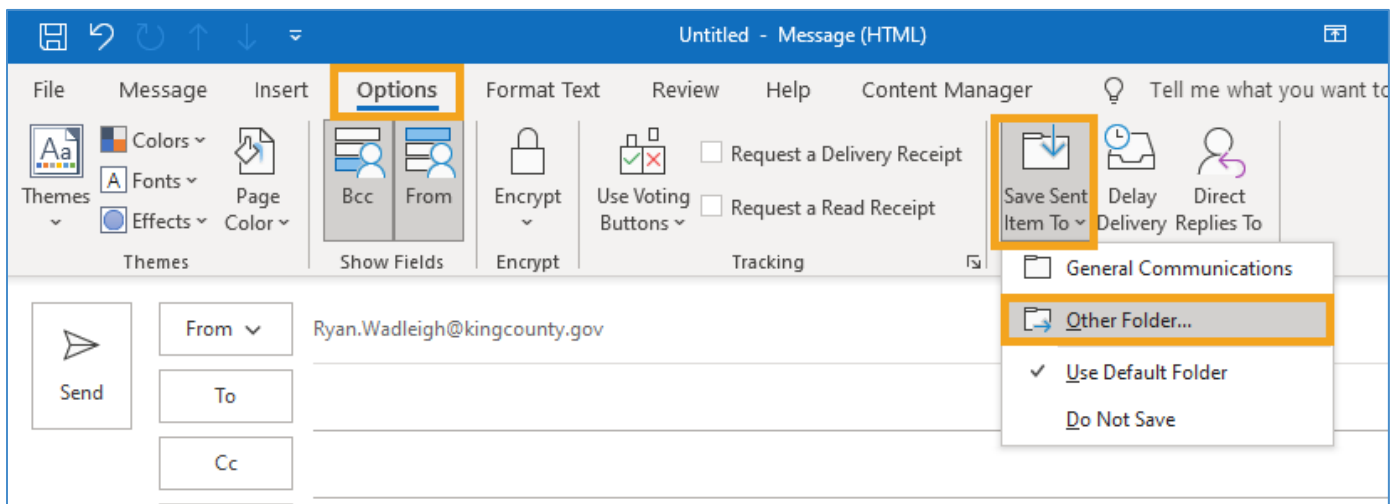
Rules

Rules can be used to do many things, but they are especially helpful to automatically sort incoming email from certain senders into subfolders of your choosing.

1. **Select an email** to apply a rule to and click **Rules** on the **Home tab**
2. Select **Always Messages From …** *(Note you can click "Create Rule" to modify the rule to do many different things.)*
3. **Choose a folder** to move them to
4. Click **OK**

Then any future emails from that sender will always go into that folder.
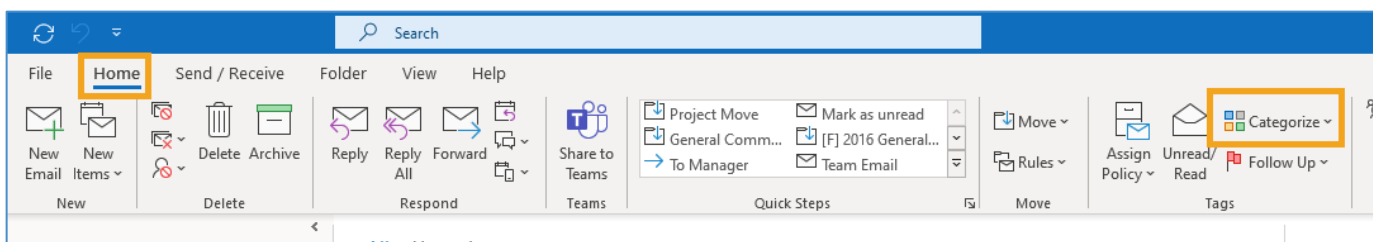
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www.kingcounty.gov/recordsmanagement

RECORDS MANAGEMENT

05/2022

5 of 15

Records Management Guidance

Outlook Tools for Email Management

Categorize

Many use "Categories" in Outlook to apply different tags (each with a different color) to emails. This can be helpful to manage your email and flag certain email for different types of follow-up, and can also be a way to organize emails in preparation for filing to Content Manager.

1. Click the **Home tab** and **Categorize**
2. Either **click on to select an exiting default category**, or click **All Categories** to modify/rename categories.

After you have used these Categories, you can then arrange emails by category (see page 9)

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RECORDS MANAGEMENT
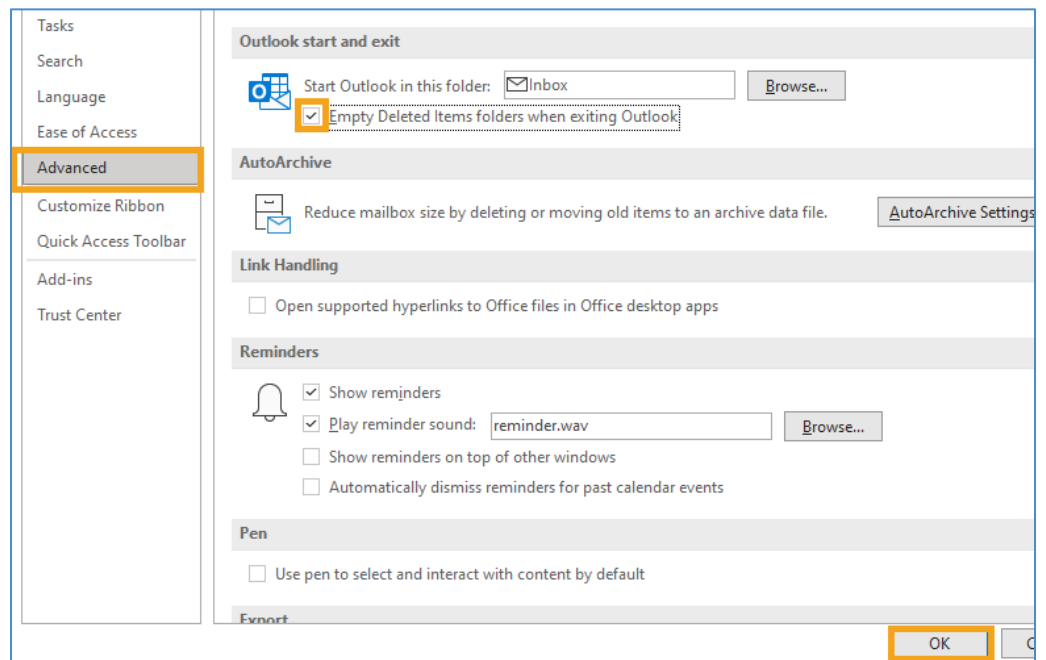
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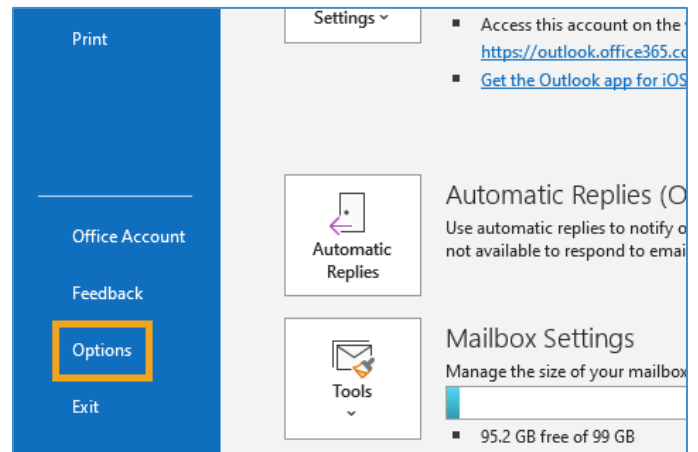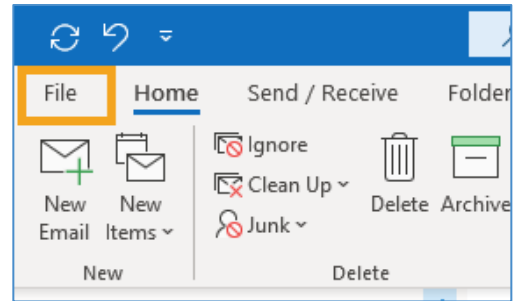6 of 15

Records Management Guidance
Outlook Tools for Email Management

Empty Deleted Items

When you delete an email, it goes into the Deleted Items folder. But the Deleted Items folder will never empty unless you take further action. It is a liability to not delete deleted items, as everything in that folder is still discoverable and disclosable.

To set a policy to delete your Deleted Items every time you close Outlook (Recommended):

1. Click **File** (top left)

2. Click **Options** (bottom left)

3. Click **Advanced** (left column)

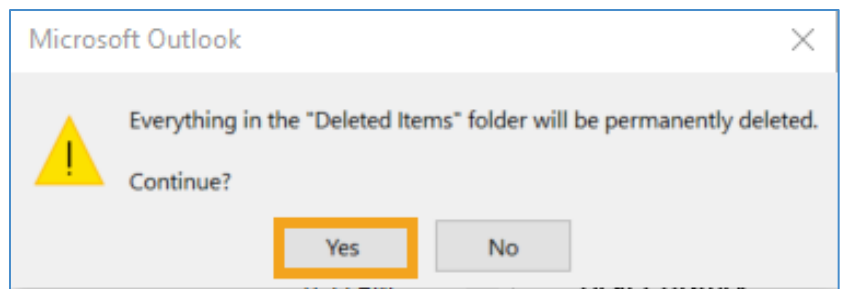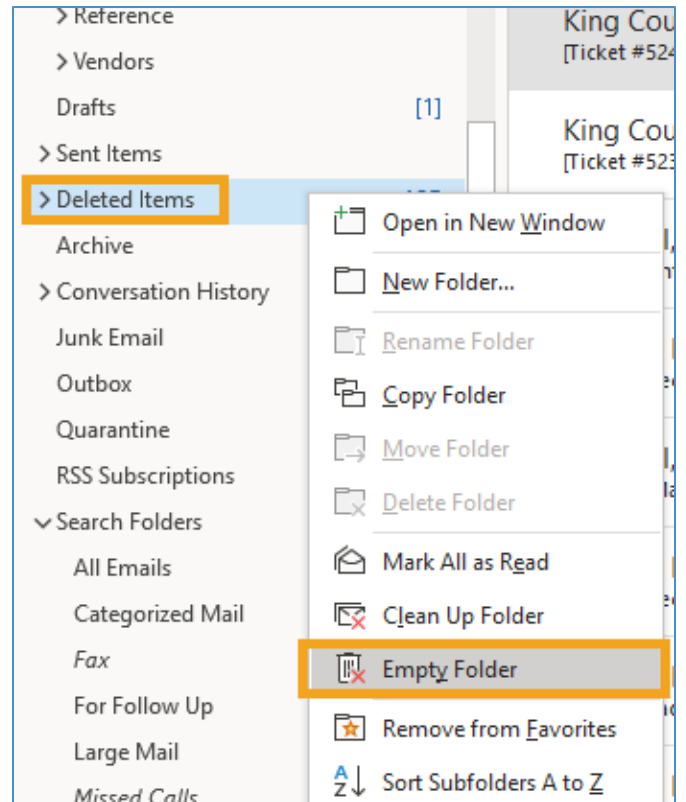4. Put a check mark next to **Empty Deleted Items folders when exiting Outlook** and click **OK**

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05/2022

RECORDS MANAGEMENT

Or, to **manually empty Deleted Items**:

1. *Right* click On **Deleted Items**
2. Select **Empty Folder** and click **Yes**

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05/2022

8 of 15

Arrange by

By default, emails are displayed in date order, with the most recent emails appearing first. But it can be very helpful to arrange them differently, which can be helpful when determining when to take action on something, including filing to Content Manager.

1. Click the **down arrow triangle** in the top of the list of emails (just below the ribbon).
2. **Select the option** you want to arrange by

Common arrangement options:

Date – default is to arrange by date sent/received, this can be helpful when managing records, especially if filing into a year-end category like General Communications or General Office Accounting
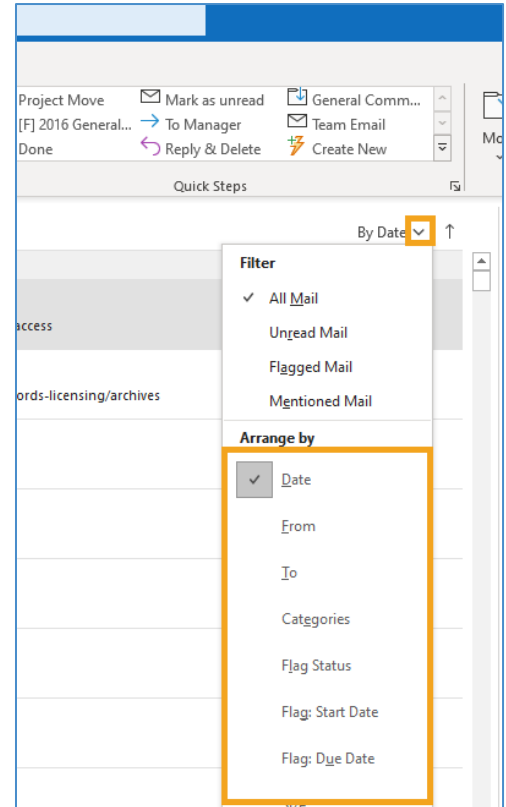
From – this sorts by the name/email of the person who sent the email. This can be helpful to find what you're looking for, and also to file, especially if everything from a particular person is always about the same issue.

To – this sorts by the name/email of the person who the email was sent to. Like "From", this can also be helpful for finding emails and also filing.

Categories – this can be used to arrange email by color category, which is only helpful if you are using those categories

Subject – this is used to arrange email by the subject line of the email.

Type – this is used to arrange email by the "type" of message. Most of them are emails, but this can be helpful to locate common transitory email types, including meeting requests, and accepted/rejected/tentative meeting notices.
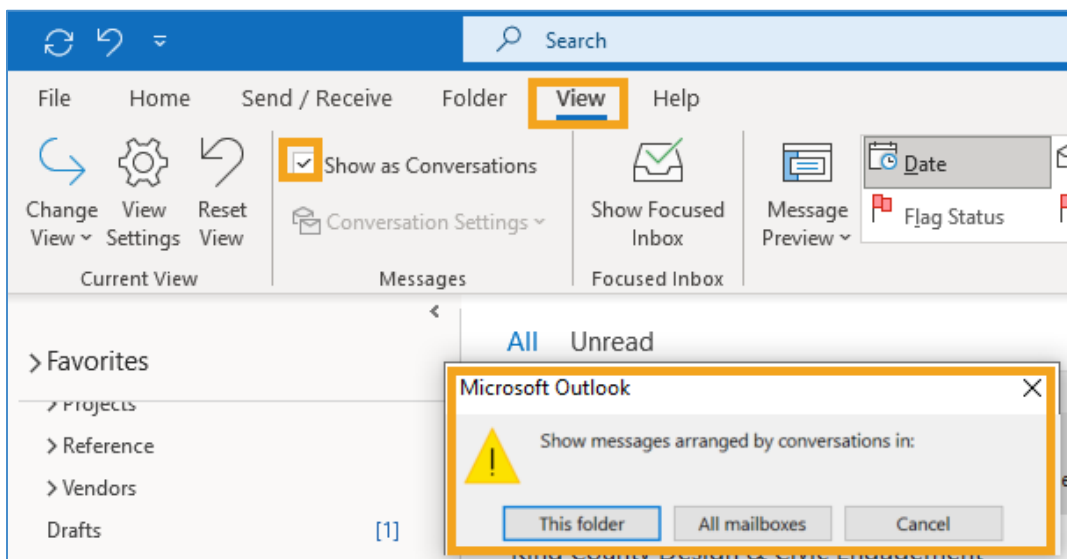
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05/2022

9 of 15

Records Management Guidance
Outlook Tools for Email Management

Show as Conversations

This feature is used to group emails together by "conversation", which shows all of the emails together that are a part of a single chain.

1. Click **View tab**
2. Check mark next to **"Show as Conversations"**
3. Choose whether to apply to the specific folder you're in, or all of your Outlook folders.

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RECORDS
MANAGEMENT

05/2022

10 of 15

Records Management Guidance
Outlook Tools for Email Management

Quick Steps

Quick Steps can be a shortcut to move emails into subfolders while you are going through them.

1. Click the **Home tab** and **Create New** in the **Quick Steps** Box.
2. Then click **Choose an Action** and then choose **Move to folder**, and then click **Choose folder** to choose a folder to file to, and click **Finish** (in this step you can also create a Quick Step to do other actions, like Delete, tag with a Category, mark as unread, etc.)
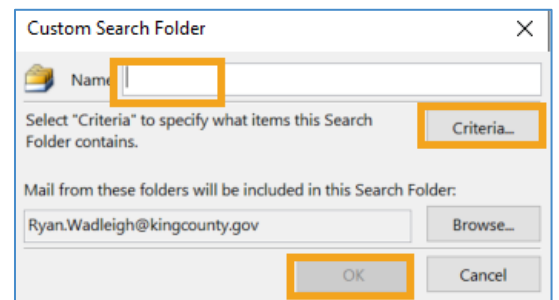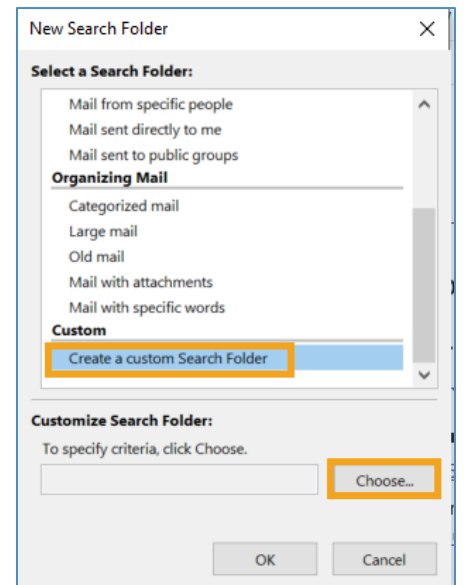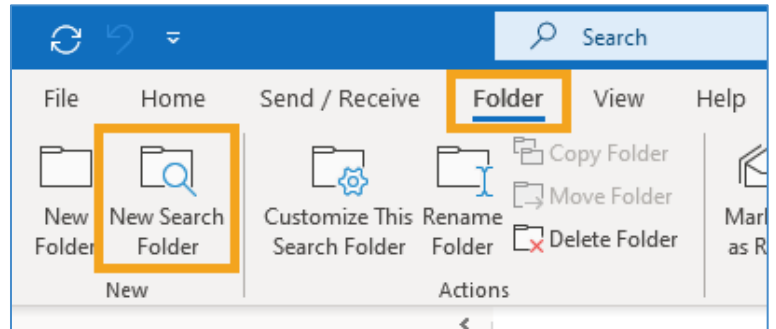
Then, you can move an email to a folder simply by clicking on the folder in the Quick Steps box.
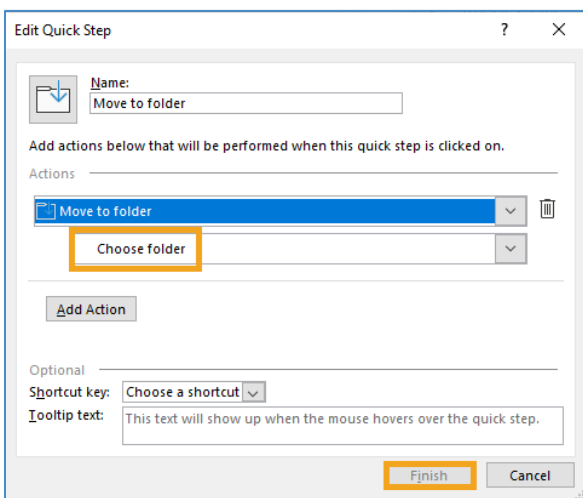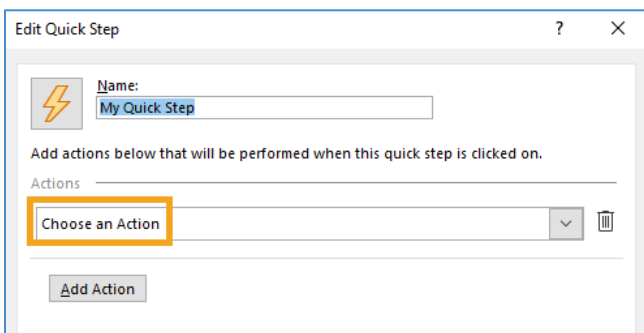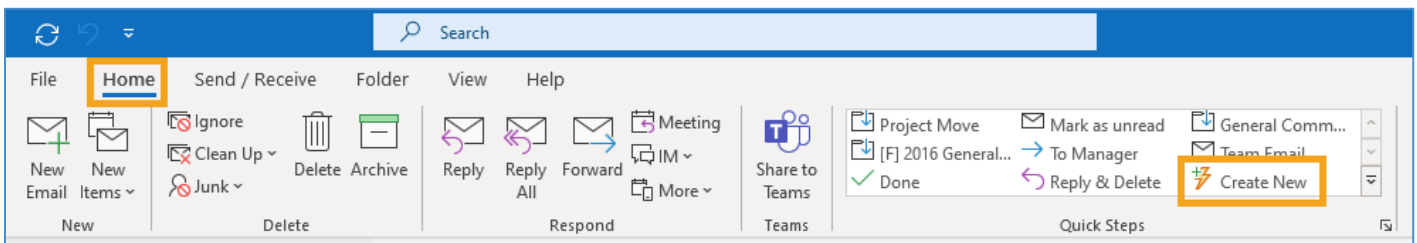
Search Folders

1. Click **Folder tab** and **New Search Folder**

2. Scroll to and select Create a custom Search Folder and then click Choose

3. **Type a name** for the folder

4. To create a search folder for **all emails** in your account, just click **OK** and then **Yes**.

Or, to create a search folder for **specific search results**, click **Criteria** and then enter the criteria you want and click OK.
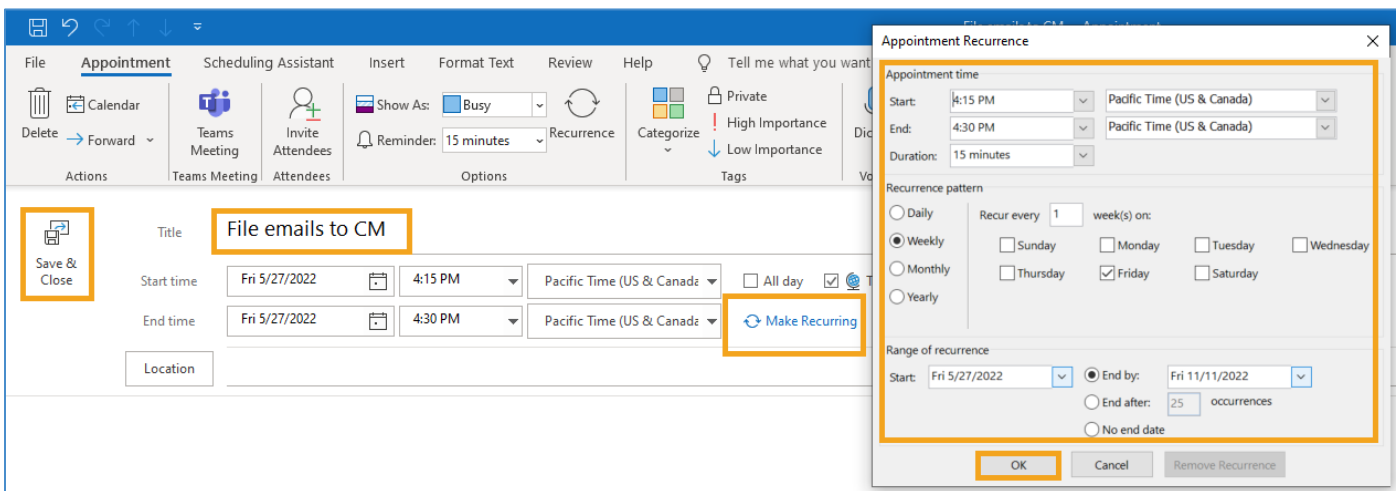
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05/2022

12 of 15

RECORDS MANAGEMENT

Appointments

Many users recommend scheduling some dedicated filing time for yourself. (It can be whatever you want – a good starting place is 15 minutes every week).

1. Click the **calendar icon** (bottom left corner)
2. Click **New Appointment**
3. Enter title, date/time and other parameters you want (click "Make Recurring" to enter details for a recurring appointment)
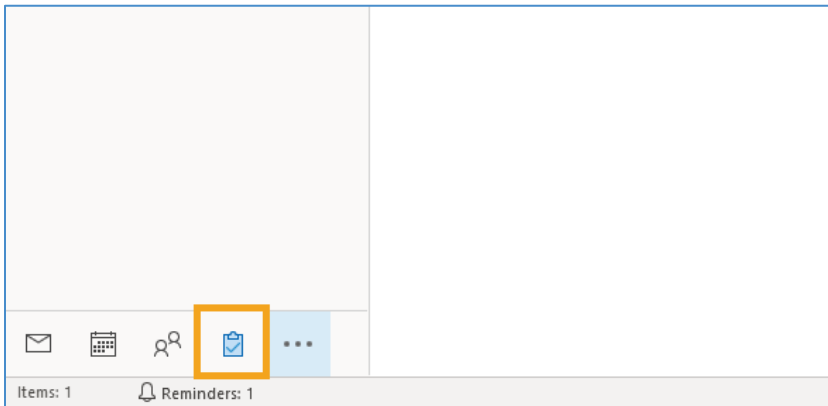4. click **Save and Close**

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05/2022

13 of 15

Tasks

Similar to Appointments, Tasks can be another way to ensure that you manage your emails.

1. Click the **Tasks icon** in the **bottom left corner** of Outlook
2. In the **Home tab**, click **New Task**
3. Fill out the task form and click **Save and Close**

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RECORDS MANAGEMENT

05/2022

14 of 15

Records Management Guidance
Outlook Tools for Email Management

Outlook Setting Change

If you have a backlog of emails older than 1 year that need to be filed to Content Manager, it is recommended to make this Outlook setting change. This helps to ensure that you don't receive error messages when filing to Content Manager, and also cuts down on the number of steps.

1. Click **File**
2. Click **Account Settings** and **Account Settings**
3. **Select your email** and click **Change**
4. **Drag the cursor to the right** until it says **All** and click **Next** and then **Done**

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05/2022

15 of 15

RECORDS MANAGEMENT