### Best Practices for Email Management

- **Delete it.** Can you find the info elsewhere? Delete!
- **Delegate it.** Identify the most appropriate person to respond to the email, delegate, and delete it.
- **Do it.** If it takes 2 minutes or less, then do it NOW! 30% of all email can be addressed this way.
- **Defer it.** If it will take longer than 2 minutes, flag or color code for future reference.
- **File it.** Create folders that apply to the functions of your office. Don’t clog up your inbox and sent mail!

### Quick Deletes

Toss these types of records when you no longer need them:

- Drafts
- Automatically Generated Notices
- Routine Requests for Information
- Duplicates
- Canned Reports from MyFD
- Notices and Memos
- Published Reference Materials

### Tools to Keep Your Inbox Clean

Don’t let your inbox fill up with **R.O.T.**

Outlook has tools to organize and manage your emails.

- Conversation View
- Flags
- Categories
- Search
- Quick Steps
- Rules and Alerts
- Clean Up
- Retention Policies

R.O.T. = Redundant, Obsolete, and Transitory

### 5 Financial Records Worth Looking Up

Use the following keywords on the University General Schedule Search to find retention for these records:

1. Receipts
2. Budget Prep
3. Bank Records
4. MyFD or ARIBA
5. Delegation of Authority

Find more tips: [finance.uw.edu/recmgt/email](http://finance.uw.edu/recmgt/email)

Learn more: [finance.uw.edu/recmgt/gs/transitory](http://finance.uw.edu/recmgt/gs/transitory)

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