Cut along the dotted lines ✂

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!

Find more tips: finance.uw.edu/recmgt/email

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

Learn more: finance.uw.edu/recmgt/gs/transitory

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

Find more tips: finance.uw.edu/recmgt/email

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

Search here: finance.uw.edu/recmgt/gs/financial