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## Guest Opinion/McCorrey

E-mail management critical as volume continues to rise

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E-mail is now the primary source of all incoming and outgoing corporate communications. According to a recent AIIM E-mail Management 2006 Survey, e-mail records now contain as much as 75 percent of a company's intellectual property. With such a high percentage of intellectual property in one system it is vital that businesses begin to create procedures and policies for how they wish employees to manage and maintain e-mail information. Here are some challenges to consider:

**Challenge 1:** E-mail files are getting too large. With the onslaught of e-mail with attachments, e-mail files are becoming too large. Outlook e-mail data is stored in a single file called a Personal Folders file, or PST. Lotus Notes users usually have an NSF file. The majority of primary e-mail programs such as Outlook and Lotus Notes have a physical limit on e-mail files of around 2 gigabytes, and these files can become corrupted at around 1.5 gigabytes. Often e-mail network servers will slow down and lose performance because of the volume of e-mail files. Most information technology departments will ask users to either delete or archive e-mail in order to reduce the size of the e-mail file, or they will simply delete them after a certain time period. It is estimated that an average worker within a year could generate a 1-gigabyte-size or larger e-mail file.

**Recommendation:** If you want to keep your data in e-mail format, then consider creating an archive e-mail file. Most e-mail programs have the capability to archive e-mail into a separate file from your primary profile.

Usually, this archive file is saved on a hard drive separate from your primary e-mail file on your network server. That archiving file automatically can move all the messages that are older than a specified date into this file. In most e-mail programs you must activate the archive feature and set preferences for it to automatically archive e-mails. Setting up an archive usually solves the problem of your current inbox being at capacity with most networked server systems. It also helps to reduce the file size so your primary inbox functions more quickly.

**Challenge 2:** E-mail files are accessible only by the user. With each e-mail file being accessible only to those individual users, other colleagues and employees are not able to access important data if it is solely kept in e-mail format. Even if users are diligent in using their own file-folder system, it can be difficult to filter through numerous communications to find the one nugget of vital information. Further, usually when an employee leaves a company, that e-mail file is deleted not knowing which e-mails are important to be retained without considerable hours being spent to filter and review the files.

**Recommendation:** You can save e-mail messages directly into the shared drive or "My Document" folders on your hard drive. This method consolidates important and pertinent data into one electronic folder and provides access to others. There are several format options for saving an e-mail into the hard or shared drives. The first is to convert the e-mail into a PDF or MDI format. This saves the e-mail exactly as if you had printed it in hard copy and not reliant on an e-mail software to open, thus ensuring access to open in the future. To do this, go through your print window and choose "Adobe PDF" or "Microsoft Office Document Image Writer" from your printer drop-down menu. The other option, only for Outlook users, is to save the e-mail in "Outlook Message Format," which separates the e-mail from the PST file and saves it as its own file in the hard drive. The file then must be opened in Outlook but can be accessed by other employees when saved on the shared drive.

**Challenge 3:** Employees are not clear on what e-mails to delete or keep. Based on this recent AIIM E-mail Management Survey, less than 10 percent of businesses have a formal e-mail policy. Employees are left to their discretion of what data to keep or delete. Some data is deleted that should be kept, and other e-mail data that is kept could be used negatively in a litigation situation.

**Recommendation:** All businesses need to have a records retention schedule that provides guidelines on which data should be retained. A key business advantage is the ability to harness knowledge and information. Providing employees with this basic record-management guidance begins the process of using that knowledge in addition to protecting the company in case of any legal action.

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