NUIT Tech Talk:
Email and Calendar Best Practices
at Northwestern

Presented by:

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Agenda

- Outlook 2013
- Calendar Delegation
- Meetings and Invitations
- Email Recommendations
- New Features
- Q&A

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Outlook 2013

- Better performance and stability
- Calendar Peek (hover over the Calendar shortcut/meetings)
- Directly reply or instant message from the reading pane
- Improved mail tips, message preview, and search
- New attachment reminder
- See drafts directly from the message list
- Weather bar

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Calendar Delegation

- Allow only one person at a time to process meeting requests in a mailbox
- Have as few delegates as possible, preferably one
- Only accept or decline meeting requests from a single Inbox and one application
- Owners and delegate(s) should use same Outlook versions
- Turn off all auto-accept rules for meeting invites

Meetings and Invitations

- Accept or decline meetings from the Inbox only
- Act quickly on invitations as they are received (Accept, Accept as tentative, or Decline)
- Decline meeting requests – Do not delete meeting requests
- Do not use Outlook Web Access to accept meetings previously edited in Outlook.
- Do not make personal notes in meetings as an attendee
- Do not forward invites – Request the organizer add an attendee
- Send Updates for every change to a meeting

Recurring Meeting Recommendations

- Always schedule recurring meeting end dates
- Change the organizer if necessary rather than editing a meeting as an attendee
- For one-time changes – create a new meeting
- Move up the end date to remove a recurring meeting - Do not delete recurring meetings
- Refrain from sharing attachments
- Set recurring meetings based on length guidelines - avoid simply copying meetings

Recurring Meeting Length Guidelines

Repeating Schedule	Recommended Length	Approx Number of Instances
Daily	2-4 weeks	10-20
Weekly	2 months	8
Bi-Weekly	3 months	6
Monthly	6 months	6
Quarterly	1 Year	4
Annually	3 years or individually	3 or individual
Birthday/Anniversary Reminders	10-20 Years	Use appointments not meetings

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Email Recommendations

- Move mail messages into folders

- Place folders outside of the Inbox, not in subfolders

- Keep Office and Outlook updated to the latest version

- Keep mobile device software update to the latest version

- If using Mac OS X, and Mail or Calendar, use Software Update to update Mac OS X

Online Resources

- Main Collaboration Page:
  http://www.it.northwestern.edu/collaborate/index.html

- Known Behaviors and Recommendations:
  http://www.it.northwestern.edu/collaborate/how-to/known-behaviors.html

- Calendar Support Tools:
  http://www.it.northwestern.edu/collaborate/how-to/calendar.html

Q & A and Contact Information

- Questions?

- Contact the IT Support Center
  - 847-491-4357 (1-HELP)
  - consultant@northwestern.edu