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
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
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

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