

## Exchange Email & Calendaring “Best Practices”

Users of Exchange email and calendar systems observe that their mailbox and calendar applications do not always function at the highest and best levels of performance. While system configuration and administration have a significant impact on performance, individual practices can have a noteworthy and positive impact on how email and calendaring functions by considering a short list of “best practices.” This document outlines those recommendations (solutions) for University users.

### Email Recommendations

**1. Participate in message size limits, recognizing the value to the community as a whole.**

Reducing the size of email messages, by being aware of attachments and other embedded size limits can reduce disk utilization and therefore result in better performance. Be aware of messages that exceed the current 50 Mb limit; make every attempt to adjust email message size to 25 Mb per email message.

*Tip: University IT recommends that the number of items in any one folder does not exceed 5,000.*

**2. Mailbox size limits.**

As with enforcing message limits, implementing mailbox quotas can result in better disk performance. We strongly encourage users to limit the size of their mailboxes to 250 MB or less. Mailboxes with larger capacity should be the exception.

**3. Participate in a program of automatic archival, and a program of retrievable archive.**

Users are encouraged to archive messages and calendar entries older than one year. Those messages and calendar entries remain available to the user when they are stored on their individual hard drive or on their file storage area on the server.

**4. Open single messages at a time & close messages no longer being referenced.**

Also, consider having no more than three messages open at one time. Opening large numbers of messages negatively affects performance of servers, disk systems, server memory functions, and the client's ability to process.

**5. Hotlink in lieu of attachments.**

Rather than sending attachments, consider the option to have e-mail point via hotlinks to a stored server location. Recognize the limitation of the audience needing permissions to access the hotlink location. Name files that may reside on a server with no spaces, but with dashes and underscores instead. That will make them accessible via a hot link.

**6. Keep an eye on images.**

If sending images, consider how to minimize the size of the images. See # 1 and # 5 for additional information.

*Tip: Where possible, University IT suggests scheduling large mailings during non-business hours.*

**7. Don't run versions of Outlook below 2003.**

Versions 2000 and 2002 of Outlook are no longer supported by Microsoft. In addition, the way information is stored locally in versions 2003 and 2007 helps avoid decreases in network traffic and the freezing of your mailbox. Newer versions of Outlook provide you with more options for filtering spam.

## [Calendaring Recommendations](#)

**1. Don't over-schedule recurring meetings.**

When scheduling a recurring meeting, set end dates that are no further than six months out. "Tag" the last meeting or one earlier with a reminder to schedule the next six months. This reduces calendar activity significantly and simplifies how the application processes it.

**2. Minimize the number of open calendars.**

If you have access to multiple user's calendars, consider opening them only as needed and avoid opening multiple calendars at the same time. Do not exceed three open calendars at once. This creates significant overhead at both the user's computer and at the server and disk systems. It may also expose the user to performance issues on a low bandwidth network and on computers lacking memory.

3. **Minimize the number of delegates authorized to update your calendar.**

Best practice recommends a limit of one delegate; we recognize that busy executives may need additional delegates, but recommend keeping the number as small as possible. Delegate processing executes additional code, and along with other associated issues specific to the design of this application, may create additional user interaction.

4. **Take action on calendar events.**

Only delete a "calendar object" once action has been taken. This will significantly reduce calendar anomalies. Examples of an action are "accept" or "decline".

5. **For delegates managing dynamic and frequently changing calendars:**

If there are many exceptions, consider elimination of the single recurring meeting and addition of a manually entered meeting so that the number of things that Exchange is managing is simplified.