

Effective Outlook workshop

Email: the curse of the twenty first century?

While email is a vital communication tool in the modern office it can, like all tools, be misused and become a nuisance. If you receive 30 emails an hour, you are likely to spend 50% of your time reading and responding to them. Is this really the best use of your time?

Why were you copied in to that email? Was it because you really needed to know the information contained in it? Or was it to cover a colleague's back or because, some time way back in the email string, you were copied in by someone else?

Here are some ideas for handling email more effectively

- **Use your system properly**
 - Use the 'rules' tool to send emails direct to folders or to send copies to folders so that you can delete the original without filing it
 - Consider setting up a rule which diverts all emails to a special folder where your name is in the cc box rather than the To box
 - Use the Spam button ruthlessly for sales emails
 - Drag emails to Tasks or Calendar or both when appropriate
 - File your emails sensibly – by people, or by topic or by date
- **Switch off your email alert.** Dealing with each email as it comes into your inbox is not an effective use of your time. If someone needs you to respond immediately, they will phone or come and speak to you personally. Look at your emails at intervals during the day and deal with each one in your inbox then, using the 6 D's to help you – **Decide**, **Dump**, **Delegate** (forward), **Defer** (save in a folder) and **Diarise** (drag to Tasks or Calendar) or **Deal** (reply or forward). Only look at your emails as frequently as you need to in order to follow this rule.
- **Have a sensible office email protocol** which discourages the copying of emails for the sake of it. Yes, you're going out for a sandwich but do the Finance Team really care?
- **Consider talking to people as an alternative.** If you and a colleague are engaged in an email dialogue, it might be better to meet and talk the issue over. This will take less time and, as you will both be focused on that issue at the time, you will give it more effective attention than you would if you attempt to think about it briefly in the middle of your other tasks.

Email tips

The following tips are for use with Outlook 2003. All of them are possible in Outlook 2007 but the screen views are different and boxes, menus etc are shown differently.

Turning off your email alert

There is no need to know about every email as soon as it arrives. In fact, this is a serious distraction from work and makes it difficult to concentrate on tasks in hand.

Choose **Tools** in the tool bar at the top of the page. At the bottom of the menu, choose **options**. The menu will open at the **preferences** tab. Choose **email options**, the first choice in the list. Halfway down the menu, click on **Advanced E-mail options**. About halfway down the next menu is a series of options for **when new items arrive in my inbox**. Uncheck all the options. This will stop any noise or visual signal when new email arrives. Our advice is to check your emails between four and eight times per day, depending on the nature of your work and of your manager!

Zipping a document

Zipped documents take less memory and are therefore easier to send as email attachments.

Find the document you want to zip.

Right click on it.

In the drop down menu, go to **send to**

In the new menu, go to **compressed (zipped) folder**

This will then produce, in the same folder as the document, a new folder icon with a zip on it. If you click on this, the document will be inside.

If you want to zip a whole folder instead of a single document, highlight the folder, right click on it and follow the instructions above. The new 'zipped' folder will contain a copy of the original folder with all the documents inside it.

Setting rules

In your inbox view, go to **tools** at the top of the screen.

In the drop down menu, go to **rules and alerts**

In the top left corner, click on **new rule**

At the top of the new window, click on **start from a blank rule**

Choose **check messages when they arrive** for a rule that applies to messages you receive in your inbox

Choose **check messages before sending** for a rule that applies to messages you send to other people. Click on **Next**.

Choose one of the criteria in the new drop down list. For example, choose **from people or distribution list**

In the box at the bottom, you will be asked to define your criteria. For example, if you want the rule to apply to every email from your manager you would tick **from people or distribution list**

This criterion will then appear in the box at the bottom of the menu. Click on it and you will be given a new menu to pick from. If you chose **from people or distribution list**, you will be given a list of contacts. At the top right hand corner is a drop down menu of contacts list to choose from. Choose your **Outlook contacts**. Then choose your manager from the list. Click **Next** at the bottom of the screen.

You will then be given a drop down menu of options for this rule. You could choose to **move it to the specified folder**. You then set up a new folder within your inbox and all the emails from your manager will go to this folder without hitting your inbox. This might be a bit risky so you could choose instead **move a copy to the specified folder**. This will send a copy of the email to the relevant folder but will leave a copy in your inbox. When you have read the email, you can act on it and then delete it, safe in the knowledge that a copy has been saved in the folder.

When you click on **move a copy to the specified folder**, you will be asked, in the box at the bottom, to say which folder. Click on the word **specified** in the box at the bottom and you will be given a list of all the folders in your Outlook. Choose the folder you have set up for your manager. Click **Next**.

You will now see a list of possible exceptions. If you want some of your managers emails NOT to go into this folder, find the relevant exception and tick it. For example, you might not want to save 'out of office' messages. In that case, go to the exception near the bottom of the list that says **except if it is an Out of Office message** and tick this. Click **Next**.

In the next box, you will be asked to name your rule. Windows will automatically give the rule a name and you can choose to accept this one or change it at the top of the menu. Click **Finish**. Click **OK**. You will see a message that the Server is updating and then the new rule is active.

To operate this rule on all the messages in your current inbox, make sure you go to the **Tools** button at the top of the screen from your inbox view. Click on **rules and alerts**. You will see a list of rules. At the top of the menu bar, click on **run rules now**.

Tick your new rule. Further down the menu, it says **Run in folder** Check that in the box opposite this, it says **Inbox**. Click on **Run Now**. You will see a

quick line across the screen to show the rule is running. When this has finished, click on **Close**. Click on **OK**.

Message options

In a new message, click on the **options** button on the right hand side of the tool bar at the top.

This allows you to do several things with your message.

1 Voting Buttons

By using voting buttons, you can encourage colleagues to express an option on simple options and get the consensus or majority feeling. If you tick the square next to **Use voting buttons**, you can choose from a drop down menu: **approve;reject** or **yes;no** or **yes;no;maybe**. When colleagues receive your email, the buttons are at the top left hand corner and they can indicate their choice by clicking on their chosen button. An example of when you might use this would be after a team discussion on whether to cancel the next Staff Meeting. You could email the whole team, using the **yes;no** option to get a vote from all team members. Voting buttons in Outlook 2003 only work on people in the same email exchange system. The buttons will not appear when you send your message to people with external email addresses.

2 Request a delivery or a read receipt

Most of us get messages from time to time saying that the sender has requested a delivery/read receipt. This is a way of making sure your email has arrived and been seen. A delivery receipt ensures that the email has arrived in the recipient's inbox. A read receipt means it has been opened. It's important not to overuse this facility – it can be very irritating for the recipient!

To get a delivery receipt, check the box opposite **request a delivery receipt for this message**.

To get a read receipt, check the box opposite **request a read receipt for this message**.

3 Have replies sent to

This will enable you to divert replies to an email to another person, for example your PA or someone who will be dealing with matters while you're on holiday. The default is for your own name to be in this box and if you tick next to this option, your own name will come up in the menu. You can then add or substitute a name according to your requirements. You can pick names from an address book by clicking on the **select names** button on the right or you can type in someone's email address straight into the box. The person whose email you choose for this option does not have to be in the same Microsoft exchange system as you – it will work with any email address.

4 Do not deliver before:

You can use this option to delay sending messages. For example, if someone is on leave or busy at a big event, you may not want them to receive your email while they are away. However, you need to send it while you remember and while the subject matter is fresh in your mind. Click on this option and the two boxes to the right will show today's date and time. Use the drop down menus to adjust these to when you want the email to arrive.

5 Expire after:

Use this option for quick emails which have only immediate relevance, eg 'The sandwich man is here!' Nothing is so irritating as receiving this email the next morning, so use this option to ensure the email vanishes after a certain date/time.

Archiving your emails

You can set up a default in your Outlook system which ensures that your emails are archived regularly. Many office systems do not allow individuals to do this so you will need to ask your emails Administrator.

To archive your emails yourself, go to **file** in the toolbar at the top of the page. Choose **archive** in the drop down menu and then highlight **inbox**. Click **OK**. You will see the names of any folders within your inbox flashing on the bottom of the screen. This is a fairly quick process unless you have thousands of emails in your inbox! Once this is done, go to the very bottom of your list of folders on the left hand side of your Outlook screen. If you haven't got a list of folders in this box, click on the folders icon at the bottom of the left hand panel. Your **Archives** folder will appear at the bottom of the folders list and within it, your emails will be filed in exactly the same folders structure as they were in your inbox. So if you have two folders in your inbox, one named Manager and one named Colleagues, these two folders and all their contents will now be replicated in your archives inbox along with all the other emails in your original inbox.

You can do this as often as you like and if your Outlook is not set up to archive automatically, you should do this at least monthly if not more often. Emails in the archive folder use less memory than those in the inbox so it helps your computer's memory use to do this as often as you can.

Adding a signature in your emails

To have a signature automatically appear in all your emails, go to **Tools** in your inbox view. Go to **options** at the bottom of the list and choose **Mail Format** from the tabs at the top of the next menu. Click on **signatures....** In the next menu, choose **new**. In the box below, type the signature you want to appear in all your emails.

For example:

With all best wishes

Jan Burnell
Director

Address
Phone number
Mobile
Website

Click on **OK**. You will need to give your signature a name, eg Jan Burnell signature. If you want to create a different signature for your replies and forwarded emails, click on **New**, go through the process again and give the new signature a different name, eg Jan Burnell replies and forwards. Click on **OK**.

This will take you back to the previous menu, with the signatures section at the bottom. In the boxes, choose which of your signatures you want to use for new messages and for replies and forwards, using the dropdown lists beside each option. Click **OK**.

Using colour for emails

This function is useful to highlight emails from particular people that you either don't want to miss or can safely ignore!

Go to **Tools** in the toolbar at the top of the page and choose **organize**. In the middle of the screen are three options. Choose **using views**. At the top the screen says **color messages** and there is a box where you can choose **from** or **sent to**. If you decide that messages from your manager should be coloured blue, choose **from** then in the next box, type your manager's email address. Finally, choose **blue** from the drop down menu on the right. Then click **apply color**. If you do this, you might also want to colour messages you send your manager blue as well. Repeat the process, but choose **sent to** in the first box.

You can also use this facility to apply a colour to messages where you are the only recipient. This can be useful if you are often the recipient of a lot of group emails which are useful to have but which don't require immediate attention. If emails addressed only to you have a different colour, you can opt to deal with these first if necessary. To apply this facility, choose a colour in the drop down menu opposite the words **show messages sent only to me in....** When you have chosen your colour, click **turn on**.

Using colour for appointments

This is a useful function to see at a glance where your appointments are taking place or what kind of meeting they are.

Go to the Calendar view of your Outlook. Choose **view** from the tool bar at the top of the page. In the drop down menu, choose **arrange by...** and then **current view**. In the next menu, choose **customise current view**. In the

menu that appears is a box labelled **automatic formatting** next to the words, **use defined colors for appointments**. Click on this box, then in the next menu, on the right hand side, click **Add**. You are now creating a rule and in the box on the left, you will see a new item with the word **untitled** next to it. Give your new colour rule a name, eg for all appointments at headquarters, name the rule 'headquarters'. Then in the next box down, click on the drop down menu by the word **label** and choose a colour. Then click on the box called **condition**. The next menu will open at the **appointments and meetings** tab. In the box marked **search for the words**, type a word which you will always use to define meetings of this kind. For example, for meetings at headquarters, you might type the word 'headquarters' or for Board meetings, you might type the word 'board'. When you've finished, click on **OK** three times until all the menus have disappeared. When you next create an appointment with the key word in the subject, it will show with your chosen colour in your calendar.

Using colour for tasks

Most people prefer overdue tasks to show in a different colour, often red.

Go to **Tools** in the tool bar at the top of the page and choose **options**. This will open at the **preferences** tab. There are a number of useful things you can do from this tab including creating signatures and a number of options around how your Outlook displays your emails, tasks and calendar.

Halfway down the page, click on **task options**. By the words **overdue task color** choose your preferred colour from the drop down menu. Red is the default in most systems. Click on **OK**.

Sending appointments

To send an appointment to someone else, create the appointment and in the tool bar at the top of the appointment box choose **invite attendees**. The appointment then shows as an email with a **to** box. Type your colleagues' email addresses in the **to** box and click **send** in the top right corner. You can cut and paste documents into the notes box at the bottom of the appointment, for example the agenda for the meeting. With the appointment open, go to the documents on your computer or server, find the one you want, highlight it and right click. Choose **copy** from the drop down menu. Return to the appointment, and right click in the notes box. Click on **paste** in the drop down menu.

Assigning tasks

You can send a task to a colleague for them to pick up. You can choose for this to remain on your own task list until they delete it as completed or for it to disappear from your task list when they accept it.

Click on **new** in the tool bar at the top of the page and choose **task** to create a new task. Name your task, give it a start date (if you want to) and a due date and put any notes that might be helpful in the box at the bottom of the task. You can also cut and paste documents into this box which might be useful where a task might involve reading particular files. Find the document in the files on your computer or server, highlight the document you want, right click and choose **copy**. Then go back to the screen with the task and in the box at

the bottom right click and choose **paste**. You will see the document in the box and the task recipient can open it when they receive the task.

In the toolbar at the top of the task box, choose **assign task**. The task will take on the appearance of an email, with a **to** box near the top. Put your colleague's email address in this box and click **send**. The task will arrive in their inbox and they can choose to accept it or not. Once they click on **accept**, it will appear in their task list.

Recurring tasks

Some tasks crop up on a regular basis and it's useful to be reminded of them at the appropriate frequency. For example, I have a task which advises me to check my 'Brought Forward' folder once a week.

Create a new task, as above. In the tool bar at the top of the task box, choose **recurrence**. At the left hand side, you can check options: **daily, weekly, monthly or yearly**. If you want the task to pop up every week on the same day, choose **recur every week on** and choose the appropriate day. In this option, you can set the weekly interval for the task, for example, every 2 weeks, every 3 weeks etc. The other option is to check **regenerate new task after** and then specify how many weeks. This will mean that every time you check the task as completed, it will pop up again at your specified interval. Having done this, click **OK** and then click **save and close** in the top left hand corner of the task box.

Clicking and dragging

With your folders list open in the panel at the left hand side of your Outlook, you can click and drag from any view to create a task from an email, or an appointment from an email or an email from a task etc etc.

To click and drag an email to an appointment

For example, someone sends you an email about a meeting they want to set up with you and another colleague. Click on the email in your inbox and drag it to the calendar icon at the left hand side of the Outlook screen. The email will then show as an appointment and you can give it the appropriate date. Choose **invite attendees** at the top to send this appointment to your colleague. Any attachments in the original email will not automatically attach to the appointment but you can right click on the attachment in the email, and choose **copy** in the drop down menu, then go to the notes box at the bottom of the appointment, right click and choose **paste**. The attachment document will now appear in the appointment notes box.

To click and drag an email to a task

For example, someone sends you an email which reminds you to do something. Click and drag the email to the tasks icon at the bottom left hand side of your Outlook screen. It will then show as a task and you can give it a due date, a priority and, if appropriate, assign it to another colleague (see above).