

Effective Outlook

Some basic tips

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.

Below are some tips to help you navigate Outlook and use more of its functionality. This is written for Outlook 2010. You can do all these things in earlier versions of Outlook but the buttons may be in different places!

Email tips

The following tips are for use with Outlook 2010. All of them are possible in Outlook 2003 and 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.

In the main menu for your emails, go to **File** in the top left corner. In the menu that comes up, click on **Options** near the bottom of the list. In the menu that comes up, click on **Mail** near the top of the left hand side. In the dialogue box, look for **Message Arrival** toward the bottom. 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 **Rules** at the top of the screen in the **Move** box.

In the drop down menu, go to **create rule**

In the drop down menu, go to **manage Rules and Alerts**

At the top of the new window, click on **New Rule**

Under the bold heading **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 public group**

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 public group**

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 public group**, you will be given a list of contacts. At the top is a drop down menu of contacts lists to choose from. Choose **Contacts**. This will bring up all the contacts in your Outlook Contacts list. Then choose your manager from the list.

Next you need to choose the folder to move the email to. Where the word **specified** is highlighted, click on this and you will get a replica of your Inbox and its sub-folders. Either choose a folder to move these emails to or create a new folder, perhaps called **Manager**. 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**. If you choose this, 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. Click **Next**.

You will now see a list of possible exceptions. If you want some of your manager's 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. You can also make exceptions for meetings invitations or acceptances. 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**. Make sure you now click **OK** in each menu box until they all close! 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 **Move** box at the top of the screen from your inbox view. Click on **Rules** and then **manage rules and alerts**. You will see a list of rules. Check the box beside the rule you want to run. 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 click on **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 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 Direct Replies 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. If you click on this in the main **Options** menu, you get a menu and the **Direct Replies** to option is halfway down. The default is for your own name to be in this box. You can 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:

This is in the same menu as **Direct Replies to**. 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. Check this box 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:

This is at the bottom of the same menu. 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.

Adding a signature in your emails

To have a signature automatically appear in all your emails, open a new email and go to the **Insert** menu at the top. Click on Signature near the top left. At the bottom of the drop down menu choose **Signatures....** Three dots after a name in a menu indicates that there are several options.

Below the signatures box, click on **New**. Most people have a long signature with all their contact details for new emails and a shorter one for replies. Decide which to create and name it accordingly. Your organisation may require signatures to be in a specific format or to include specific text, eg your company number. Check this out with IT before proceeding!

Then, in the signatures box type the signature you want to appear in your emails. If necessary, create another signature for replies. On the right hand side of this menu, it says **Choose Default Signature**. Your email address should show in the **email account** box. In the boxes for new messages and replies/forwards choose the names of your newly created signatures from the drop down menu. Click **OK**.

For example:

With all best wishes

Jan Burnell
Director

Address
Phone number
Mobile
Website

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!

In your email view, right click on the main screen. Click on **View Settings**. Click on **Conditional formatting: User defined fonts for each message**.

On the right hand side, click on **Add**. You have now created a new rule so name it, perhaps using the name of the person to whose emails this applies, eg **Jane Smith**. Then click **Condition** at the bottom left. Choose the **From** box and in the **Address book** drop down menu at the top, choose **Contacts**. In the menu on the left, choose the person whose emails you want to colour, highlight them and Click on **From** at the bottom. Their email address will appear in the **From** box. Click **OK**. Then click on **Font** and at the bottom left, choose a colour from the drop down menu. Click OK three times to close all the menus. If you want emails you send to someone to appear in the Sent emails folder in a particular colour, you can follow the same format but choose **Sent from** at the appropriate point.

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. Right click in the calendar and choose **View Settings**. Choose **Conditional Formatting User defined colours 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 box at the bottom, click on the drop down menu by the word **colour** 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.

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**. You can copy 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 copy 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).