

Reclaim Your Inbox

99 Ways to Save 5 Hours a Week on Email

First published in 2006
By Prime Solutions Training & Consulting Pty Ltd

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National Library of Australia Cataloguing-in-Publication Data:

Hanson, Donna Maree.
Reclaim your inbox : 99 ways to save 5 hours a week on email.

Includes index.
ISBN 0 9775202 0 X.

1. Microsoft Outlook. 2. Electronic mail messages.
3. Microsoft software. 4. Time management. I. Title.

384.34

Cover and text design by Danil Zorin – ideesign
Author Photo by ikon images
Edited by Anthea Bibby – Write it riTe
Typeset, printed and bound by Watson Ferguson & Company

Disclaimer

All details in this book are current at the time of publication and are subject to change. Contents of this book are based on the use of Microsoft Outlook 2003, however a majority of items can be applied to other email applications.

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Introduction

Working as a consultant and trainer to government, small business, and national and international companies, I have been exposed to many different computer environments. In the last few years, email seems to have become both a positive and a negative, not just in business, but also in life in general.

From the individual who stores all emails in the Inbox and Sent Items to the person who files or prints every message, everyone has their own way of managing their Inbox.

In our current global markets, there are increasing demands to respond quickly to clients and suppliers. Businesses are being “downsized” and “streamlined” on a daily basis and we are all expected to do more in less time.

The best way to do this is to work **SMARTER**, not HARDER. By using the technology you have at hand and learning some simple techniques, you can reduce your stress levels and RECLAIM Your Inbox.

Acknowledgements

There are many people I would like to thank for their time, love and support in making this book a reality:

My family – Brandon, Paul, James, Magic, Hugh, Pearl, Darren, Gail, Beth and Heath.

Bruce for the introduction to computer training.

Sally for her friendship, faith and belief in me.

Robyn Henderson for setting the wheels in motion and being my guide.

Sandi Givens and Paul McCarthy for their much-needed pushing.

My Forum Group buddies.

Marie Farrugia and Helen Robinett for “fixing me up”.

Helen MacDonald for showing me where to go.

Yvonne Adele (Ms Megabyte), Terry Brock, Steuart Snooks, James Harper and Marcia Griffin for their assistance.

Lisa Molan, Jon Burgess and Barbara Keyte-Berndt for opening doors.

And of course a big thankyou to Prime’s growing client list. Without you there would be no book.

This publication is the result of many years of sweat and frustration. I hope it saves you both.

Donna

Foreword

"As someone who drowns in emails every day, I know that your 99 ways to save 5 hours a week on email will revolutionise my Inbox. Thanks for a concise, informative plain language guide to reducing my email clutter. May your book be used to empty many Inboxes world-wide."

Robyn Henderson, *Global Networking Specialist*.

General
General

-
1.
Handle messages only once.
-

2.

Close email when you are not working on it to prevent incoming messages distracting you.

3.

Delete or print messages when you
have dealt with them.

4.

Regularly empty the deleted items/
trash bin (or set it to automatically
delete when you close email).

5.

Regularly back up your email and contacts to a memory stick, CD, DVD or a webserver if you aren't on a network.

6.

To locate your contacts and email files so that you can back them up, from the Menu choose *Tools, Options, Mail Setup, Data Files.*

7.

Change your default view when you open your Mailbox to anything other than email. This ensures *you* control your day and email doesn't.

8.

ALWAYS save to Draft any messages you create in anger or frustration, and review them later when you have calmed down.

9.

Regularly check your mail box size (i.e. how many MB) by right-clicking on *Personal Folders* in the navigation bar. Then choose *Properties* and *Folder size*.

10.

Archive messages you need to keep but don't access every day.

11.

Consider switching on Auto Archive to automatically archive messages not recently accessed. Go to *Tools, Options, Other, Auto Archive*.

12.

Always consider whether email is the best way to respond to an email. Would a phone call be easier and more effective than sending 5 or 6 emails back and forth?

13.

Don't rush to reply to messages as soon as they come in. Take time to consider your response, and reply when you are ready.

14.

Learn keyboard shortcuts to save
having to use the mouse to
move about.

15.

Switch on the Preview pane to preview all your messages. From the Menu, choose *View, Preview Pane*. Scan through your messages, deleting, printing or forwarding as you go.

16.

Regularly review your folder structure. As your needs change, you may need to rename, move or delete folders.

17.

Once you start reducing your mailbox size, commit to keeping it manageable.

Managing Mail

Managing Mail

18.

A bold number beside a folder indicates the number of unread messages in that folder.

19.

USING CAPITAL LETTERS in email messages is considered to be the equivalent of SHOUTING. It can also be harder to read than normal print (i.e. upper and lower case).

20.

Quickly email a Word or Excel file by right-clicking on the file in Windows Explorer and choosing *Send to, Mail Recipient*.

21.

Save yourself the frustration of people not being able to receive larger attachments you send by checking with recipients first. (Some email systems will block large files and files with **.exe** or **.zip** extensions.)

22.

Use signatures (repetitive text) in messages to save retyping information such as your name, address and contact details. (From the Inbox, choose *Tools, Options, Mail Format, Signatures.*)

23.

Take care when using the *Reply To All* option in email as it will reply to everyone who received a copy, even those who have been bcc'd (blind carbon copied) or cc'd (courtesy copied).

24.

Click ! in a mail message to let the recipient know this message is of high importance. NOTE: A good habit is to only use ! when the message really is high priority!

25.

Save a partially completed message by pressing the Escape key (top left of most keyboards).

26.

Duplicate a message by saving it as a draft. Then go to the Draft folder, click once on the message, hold down the Control key, and drag the message down the screen to create a copy. Let go of the mouse, then let go of the Control key.

27.

Preview just the first 3 lines of all messages through Auto Preview. From the Menu, click *View, Auto Preview*.

28.

Right-clicking on a message will bring up a shortcut menu with many common options such as *Reply* and *Forward*.

29.

Add a flag to a message to remind you to respond or to act on it. Right click on the message and choose *Flag*.

30.

Add attachments to mail messages using the paperclip icon or by dragging and dropping files from Windows Explorer.

31.

When reading an open message, use the Up and Down arrows (↑↓) on the toolbar to view the next or previous message.

32.

Delete an open message by clicking on the X **on the toolbar** (not the cross in the top right corner of the window).

33.

If you keep your email open, switch off the email notification message to avoid it distracting you.

34.

Change a read message to unread by right-clicking on the message and choosing *Mark as Unread*.

35.

Resend a sent message by opening it and choosing *Actions, Resend this Message*.

36.

Use the spellchecker on emails. There is nothing more unprofessional than a mail message with spelling errors.

37.

Use the “bcc” field to send email messages to a large group of people. This avoids having a long list of names at the start of the message.

38.
Regularly empty your Sent items.

39.

Don't be afraid to delete your mail messages. If you think you might need the information, print out a hard copy.

40.

Unsubscribe from any mailing lists
sending information you don't read.

Finding & Filing

These are handy hints to ensure you don't "lose" important mail messages.

Create folders by right-clicking on files and choosing *Move to Folder*. New ones can be added or items can be moved to existing folders.

41.

Create a new folder from the Menu by clicking *File, New, Folder*. Name the folder, choose the location and click OK.

42.

Create sub-folders to avoid one long list of folders that you have to scroll through. (Follow step 41, then drag and drop this new folder onto the parent folder in the navigation pane.)

43.

Quickly put one folder inside another by dragging and dropping the folder to the new location.

44.
Don't forget to move sent mail
to folders.

45.

Create a "cc" and "bcc" folder and put into it all messages you are cc'd or bcc'd on. These emails can then be read at your convenience.

46.

Save mailbox space by storing attachments separately. Save the attachment to another drive and edit the message to indicate where you have saved it to.

47.

Locate “lost” messages using the FIND button. If necessary, they can then be moved to folders.

48.

Sort email according to *Date*, *To* or *Attachments* by clicking on the relevant column heading.

49.

Right click on a message to categorise it. Messages can then be viewed by category by right-clicking on a column heading, then choosing *Arrange by Categories*.

50.

Use the ORGANISE button to colour-code messages from different people.

51.

If you are on a network, let others know you are out of the office by using the *Out Of Office* feature.

52.

If you accidentally drag a file to the wrong place, click *Edit*, *Undo* (or Control + Z).

53.

While you are in the Inbox, increase or decrease the column width by placing the mouse pointer on the dividing lines between column headings and dragging to the left or right.

Calendar

These ideas and tips help you create and manage Calendar entries more effectively.

The Calendar can generally be accessed by clicking the Calendar icon in the navigation pane on the left in your email software.

54.

Make the Calendar your default view when you open your email.

(Choose *Tools, Options, Other, Advanced Options.*)

55.

Regardless of whether recipients are on the same mail system or not, create meetings and appointments via a Calendar. Most email applications allow these to be moved or copied to the Calendar.

56.

Drag a message to the Calendar to
create a new Calendar entry.

57.

Double click on a timeslot to create
a new Calendar entry.

58.

When scheduling meetings in the Calendar, use the paperclip to attach relevant files to send to participants. This saves sending files via a separate email.

59.

Remind others of meetings by clicking on the Reminder box when you create an invitation.

60.

Use the Calendar to create meetings with colleagues rather than telephoning them all to organise a time. You can then check their availability via the *Availability* tab on the meeting entry.

61.

Colour-code Calendar entries based on whether they are tentative appointments, times you are busy, free periods or times when you are out of the office.

62.

Reschedule a meeting by dragging it to a new date and time. You will be prompted to notify others.

63.

Change your Calendar display to reflect your work hours. From the Menu, choose *Tools, Options, Calendar Options*, then change *Start and End times*.

64.

Print out your appointments for the week via *File, Print, Print Style, Weekly Style.*

65.

To display consecutive days in the Calendar, click and drag the mouse over the dates required.

66.

To display non-consecutive Calendar dates, click a date, hold down Control and click on the other dates required.

67.

Use All-day Events to remind you
of things such as birthdays or
anniversaries.

68.

Change Calendar defaults through
Tools, Options, Calendar Options.

shortcuts

Shortcuts

69.

Control + Shift + I (as in Igloo)
moves you to the Inbox in
MS Outlook.

70.

Control + N creates a new message when the Inbox is displayed.

71.
Control + Shift + G flags
a message.

72.
Control + R lets you reply to
a message.

73.
Control + Shift + A creates an
appointment.

74.

Alt + Number (e.g. 9) changes the
Calendar display to that
number of days.

75.

The Escape key will close the message you are reading.

Contacts

This section gives you quick ways to manage and utilise email contacts.

You can enter names, addresses, birthdates and other details on Contact cards which can then be sorted and manipulated.

Contacts can be located in the navigation pane on the left of the screen in MS Outlook.

Contacts

76.

Quickly add a new contact by dragging their email message to Contacts.

77.

Add a contact by right-clicking on the name within the message and choosing *Add to Contacts*.

78.

Add birthdays to Contacts for annual reminders. (Use *Details* tab.)

79.

Search for contacts in the Address Card view by clicking on the appropriate letter (surname) on the right of the Contacts view.

80.

Change the Contacts view to
Phone List view to display
more contacts.

81.

The Details area in Contacts can be used as a basic contact manager.

82.

Contacts can be exported to Excel
and used in mail merges.

83.

Create a message to a contact by right-clicking on the contact and selecting, *New message to Contact*.

84.

Create appointments or meetings with a contact by right-clicking on the contact and choosing *New Appointment* or *New Meeting Request to Contact*.

Tasks

The equivalent of an electronic “To-do” list, Tasks allow you to create a list of tasks you need to complete, and to set up reminders.

Tasks can be found via the Folder List or the Task icon in the navigation pane of MS Outlook.

Tasks

85.

Drag an email to Tasks to automatically create a to-do item.

86.

Make regular Tasks recur to avoid having to enter them individually each time. (Click the Recurrence icon on the Toolbar.)

87.

Add Reminders to Tasks to prompt you to finish them. (Click on the Reminder check box in the Task.)

88.

Display Tasks on the Calendar to keep reminding you. (To switch the Taskpad on to display from the Calendar, choose *View, Task Pad.*)

89.
Delegate Tasks by choosing
Assign to Others.

90.

Cancel a Task assignment by
choosing Cancel Assignment
on the Toolbar.

91.

When you are going on leave, use Assign to Others to delegate any of your regular Tasks to someone else.

92.

When delegating a Task to others, before sending the Task, attach any documentation they might need.

Rules

Rules are instructions, given to your email software, to take a particular action when certain things happen.

For example, you could set up a Rule that if a message comes in from bob@abc.com, it is to be moved to the ABC folder.

Create Rules from the menu in MS Outlook by clicking *Tools, Rules and Alerts*.

93.

Create a Rule to send junk messages straight to deleted items.

94.

Use a Rule to automatically move to a separate folder any messages you are cc'd or bcc'd on.

95.

Use a Rule to move to a newsletter folder any e-newsletters and e-zines you subscribe to.

96.

Create a Rule to move straight to the appropriate folder any messages that you send.

97.

Use a Rule to forward messages to someone else for action when you are away.

98.

If you don't have web mail (access via an internet connection away from your normal computer), use Rules to forward messages on to a personal or hotmail account so you can check your messages when you are away from the office.

99.

Use Rules to create automatic responses to messages received (e.g. job applications, quotes or tenders sent via email).

About The Author

Donna Hanson is a speaker, trainer, author and consultant who works with organisations to increase their productivity through better use of computer software. Donna's company, Prime Solutions Training & Consulting, is based in Melbourne and provides training and consulting services to government, and national and international clients.

Prior to establishing Prime Solutions Training & Consulting, Donna worked in a variety of administrative roles including Executive Assistant to a Managing Director and to a Sales and Marketing Manager. Her practical experience within various workplaces, along with her knowledge of many computer tips and tricks, ensures Prime Solutions Training & Consulting clients and Donna's audiences receive information and solutions that are relevant to the real world.

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