

Overcoming common email frustrations

By

Robert Crane
Computer Information Agency
<http://www.ciaops.com>



Overcoming common email frustrations

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Introduction

This booklet was created with 10 simple methods for making use of Outlook more productively. It is not designed as a comprehensive how-to guide of using Outlook, instead it provides methods of configuring and utilizing Outlook to reduce the most common everyday frustrations.

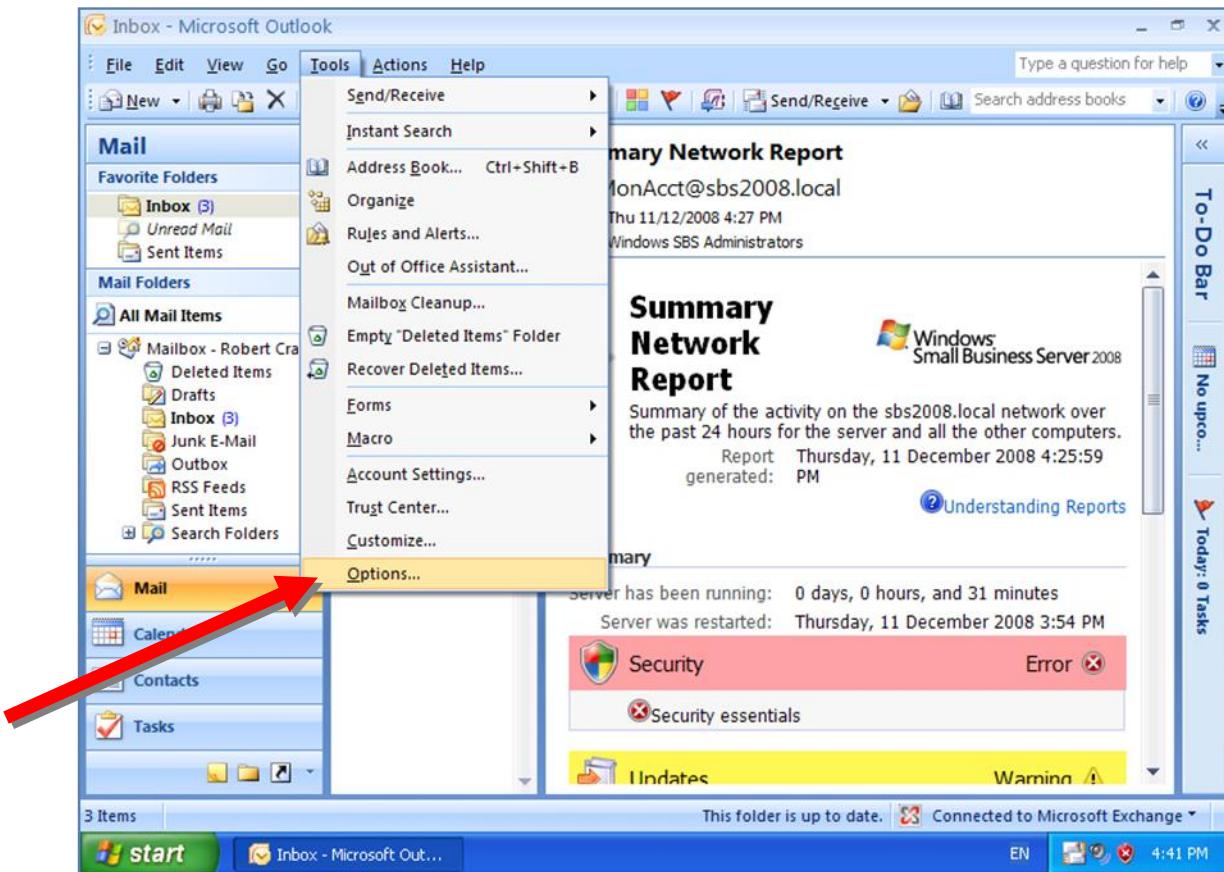
There are so many additional issues about being more productive with emails that unfortunately this booklet can't hope to cover. If you are wanting more information about how to become more effective and efficient with Outlook and emails in general then we recommend our Enhanced Email productivity seminars. More information about this can be found at <http://www.ciaops.com/smarterproductivity/> or emailing director@ciaops.com.

A.A. Milne's "Winnie the Pooh":

Here is Edward Bear, coming downstairs now, bump, bump, bump, on the back of his head, behind Christopher Robin. It is, as far as he knows, the only way of coming downstairs, but sometimes he feels that there really is another way, if only he could stop bumping for a moment and think of it.

1. Disabling notifications

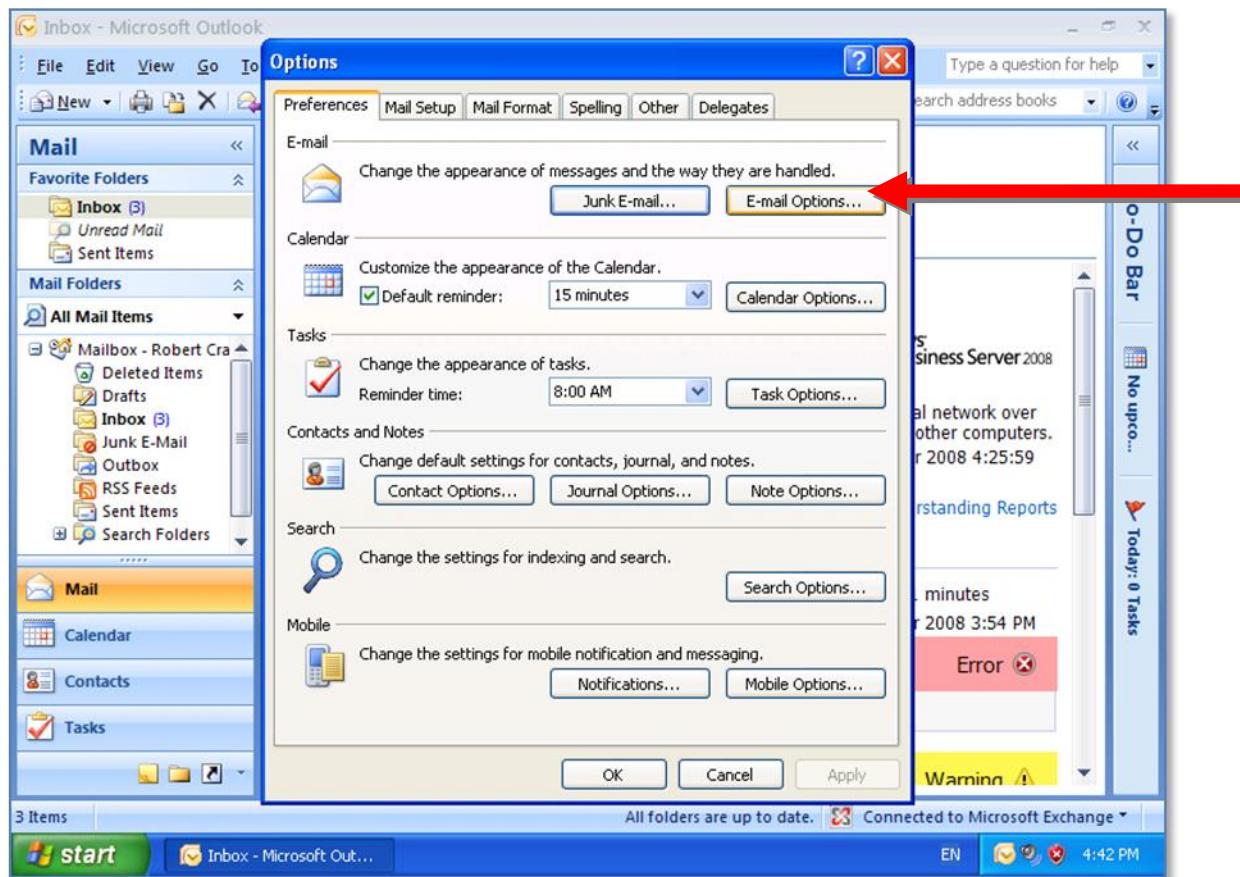
Constant email alerts promote distractions. Removing or reducing these can allow you to be much more productive because you no longer get interrupted by arriving emails.



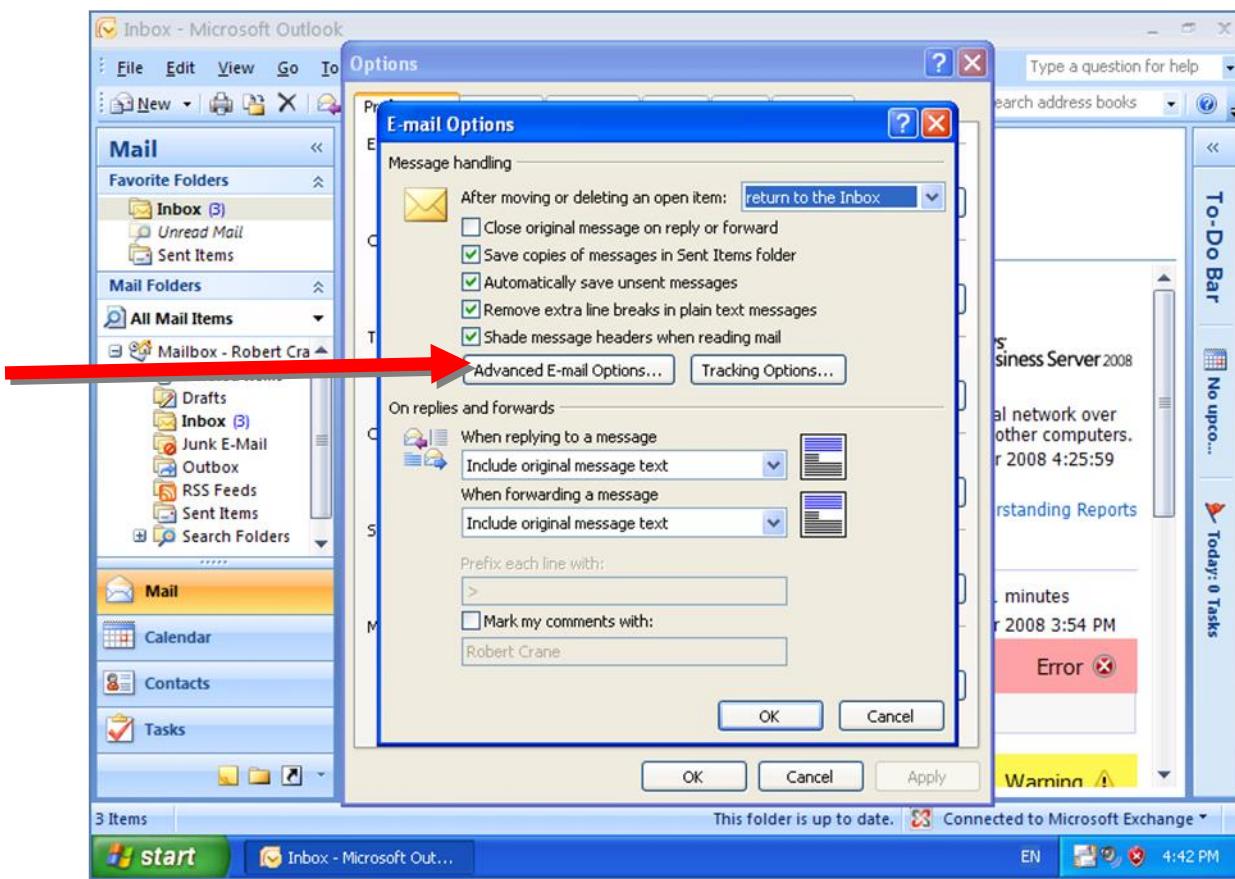
With Outlook running Select **Tools**, then **Options**.

On average, knowledge workers can expect three minutes of uninterrupted work on any task before being interrupted. Sources of interruption include e-mail, instant messages, phone calls, text messages, co-workers, and other distractions. The majority of these distractions are attended to immediately.

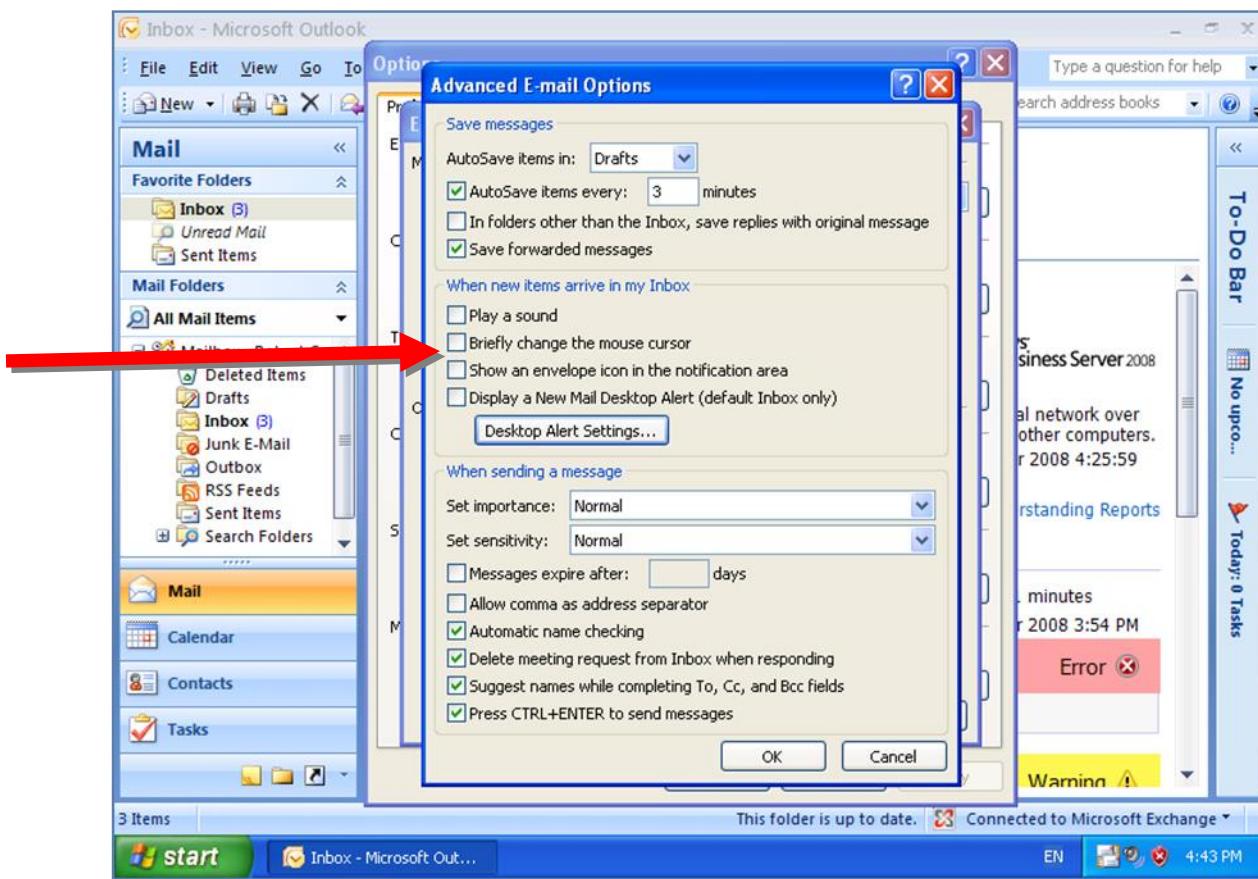
(<http://firstmonday.org/htbin/cgiwrap/bin/ojs/index.php/fm/article/viewArticle/1973/1848>)



On the **Preferences** tab select the **E-Mail Options** button in the *E-mail* section at the top of the *Options* window.



In the *E-mail Options* window that appears select the **Advanced E-mail Options** button in the middle of the screen.

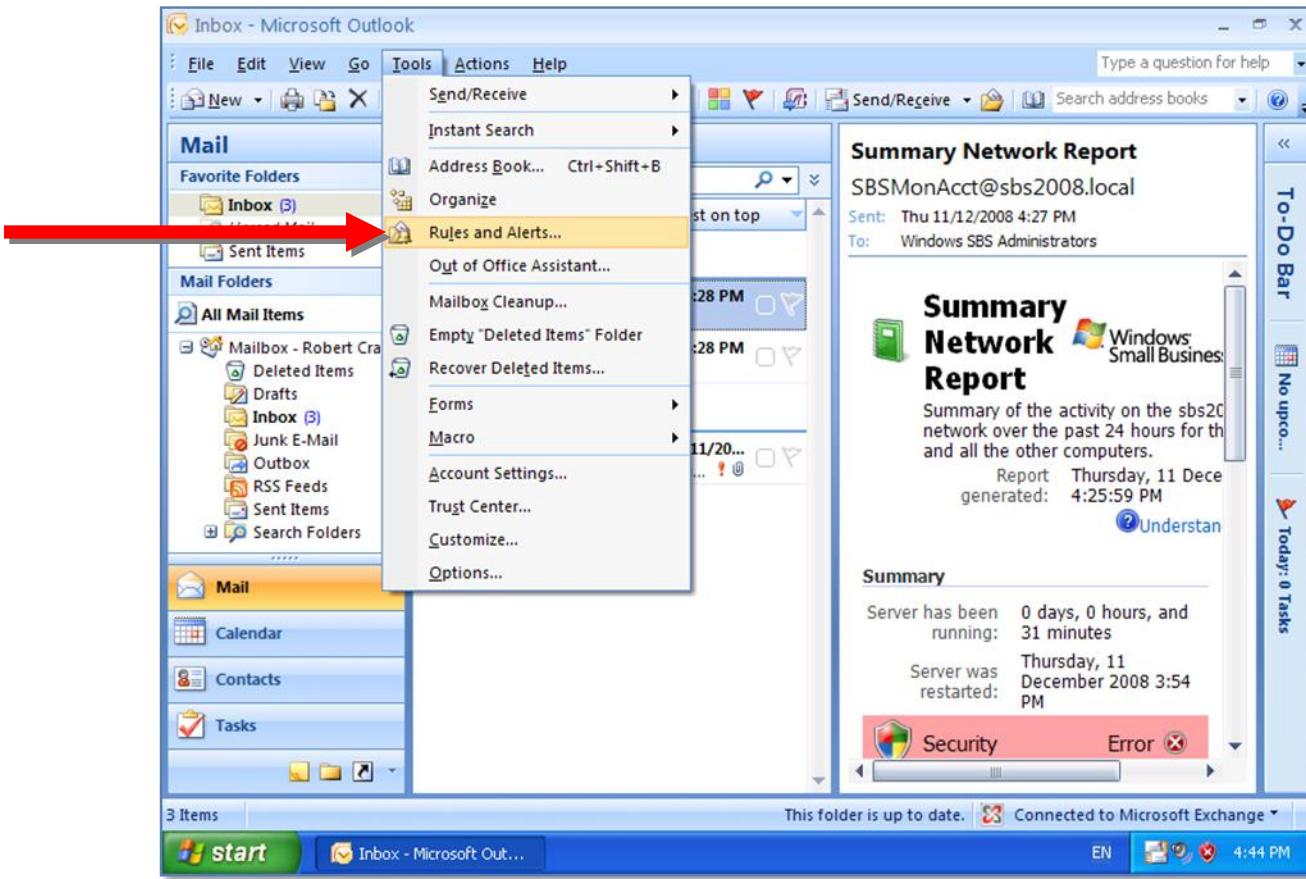


In the middle of the *Advanced E-mail Options* window that appears **unchecked** the options:

- Play a sound
- Briefly change mouse cursor
- Show an envelope icon in the notification area
- Display a New Mail Desktop Alert (default inbox only)

2. Delayed sending

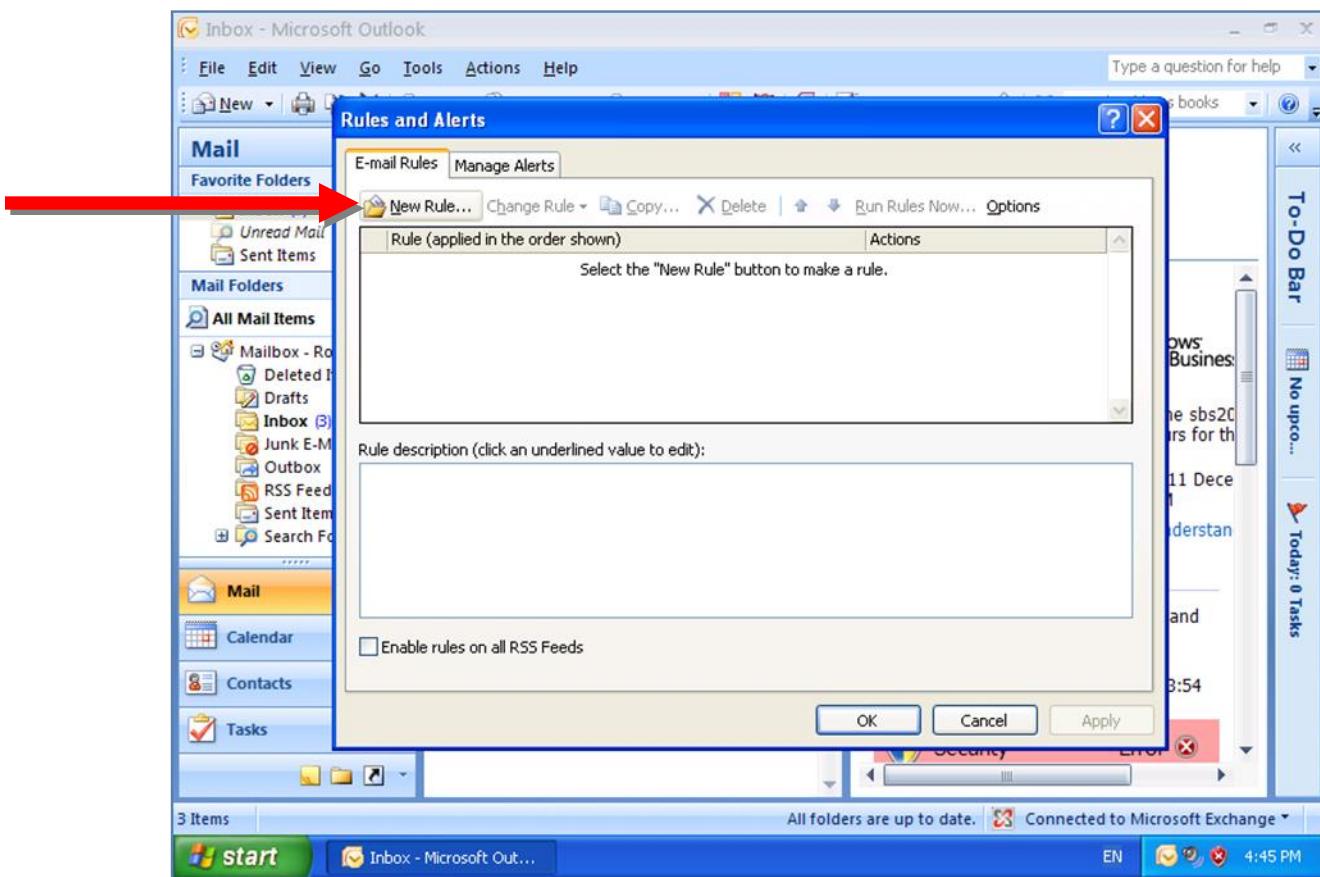
Configuring a delay in the delivery of emails provides the ability to delete or alter emails before they leave the Outbox. This can allow erroneous or ill conceived emails to be removed prior to being sent to a recipient.



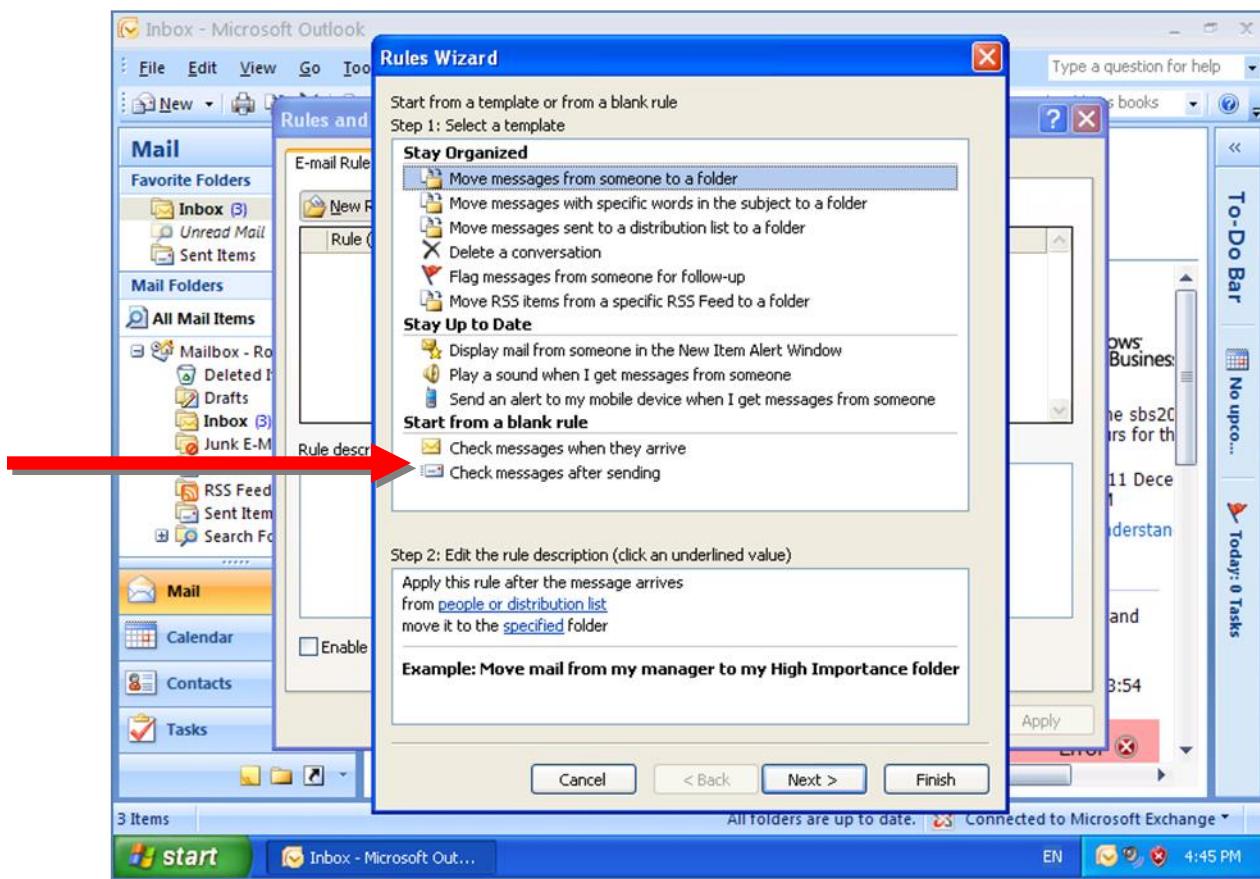
With Outlook running select **Tools** the **Rules and Alerts**.

While e-mail is a legitimate – and vital – part of today's workplace, much of it simply isn't. Intel employees spend an average of some three hours per day processing e-mail. About 30 percent of messages (one million per day) are unnecessary. The unnecessary fraction consumes about 20 minutes every day. That's fully paid time not devoted to useful work, spent creating, forwarding, opening, reading, and processing messages whose real value is less than the time consumed.

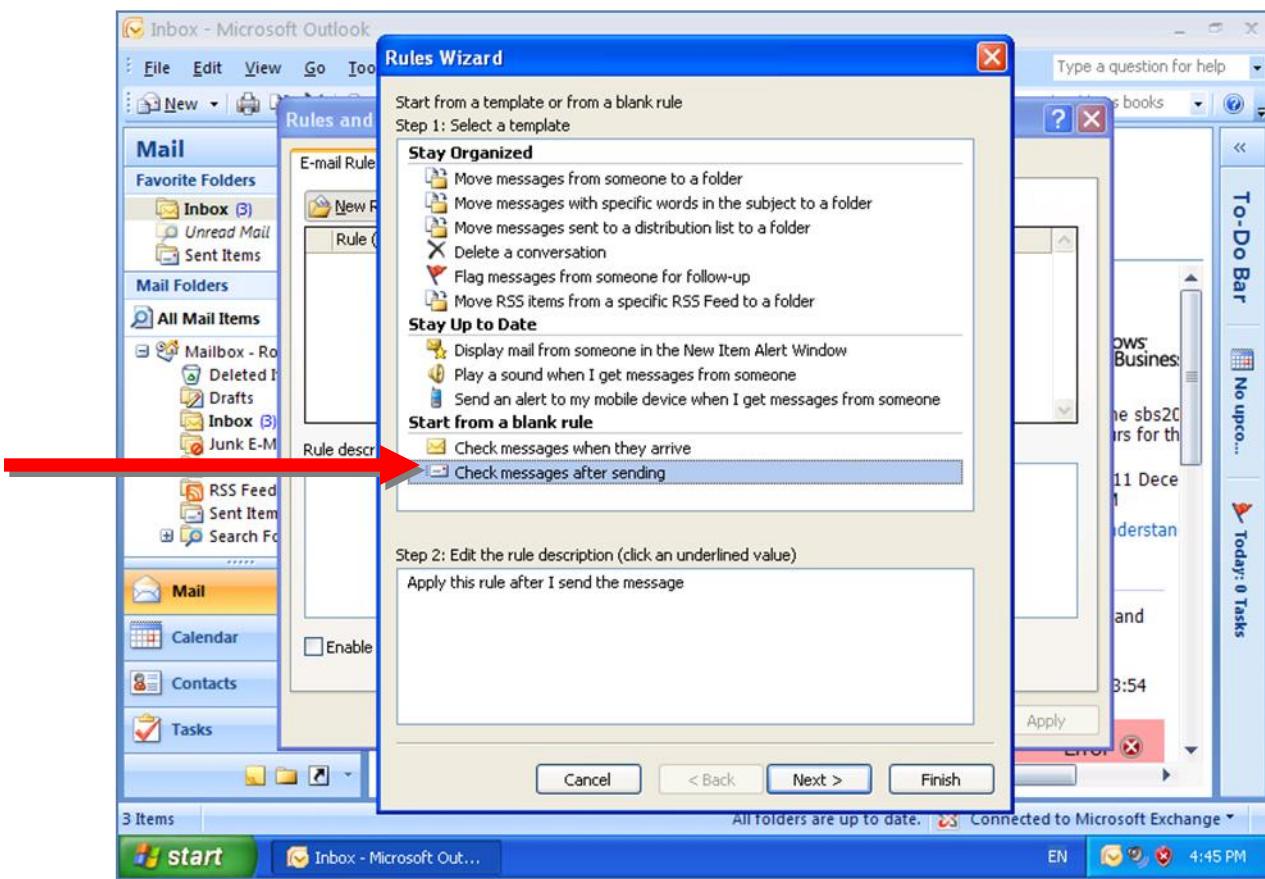
(<http://firstmonday.org/htbin/cgiwrap/bin/ojs/index.php/fm/article/viewArticle/1973/1848>)



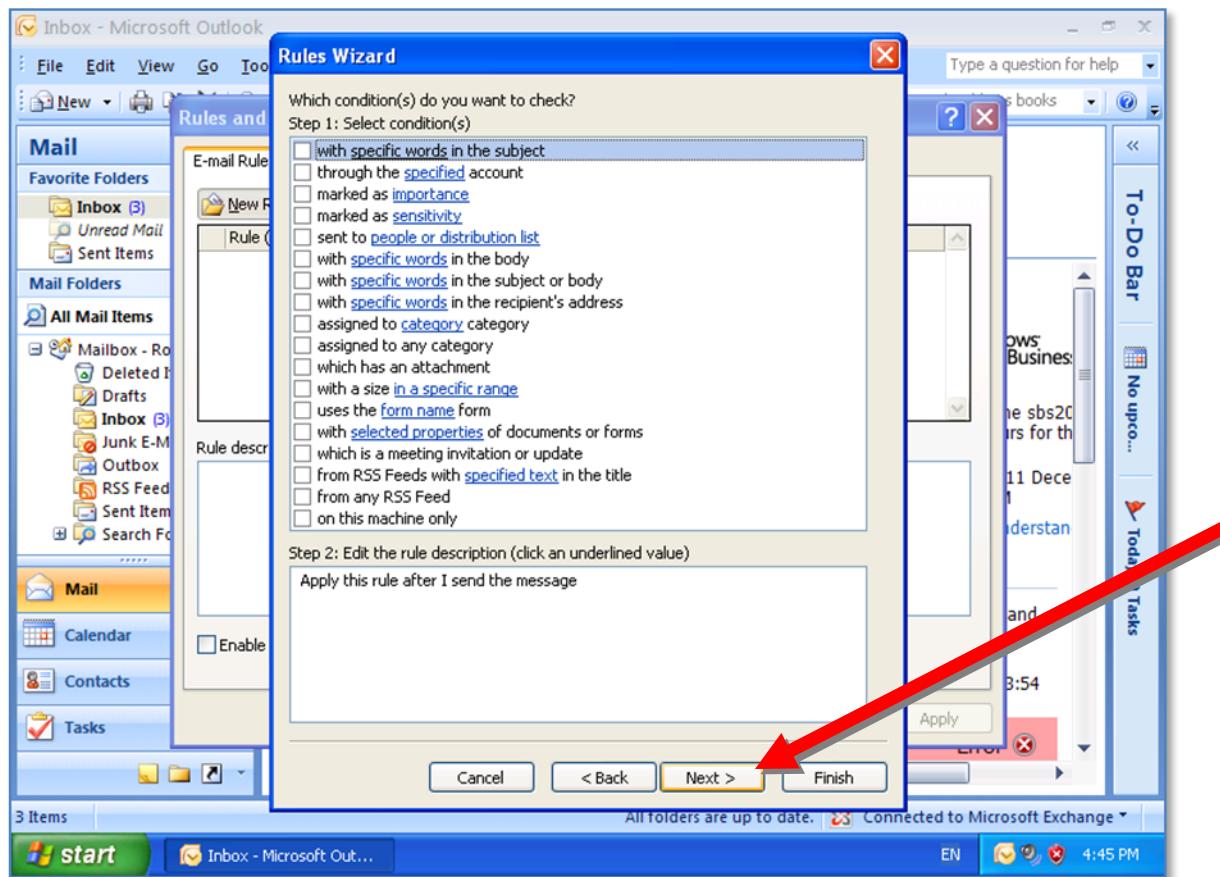
In the *Rules and Alerts* window select the **New Rule** button in the upper left.



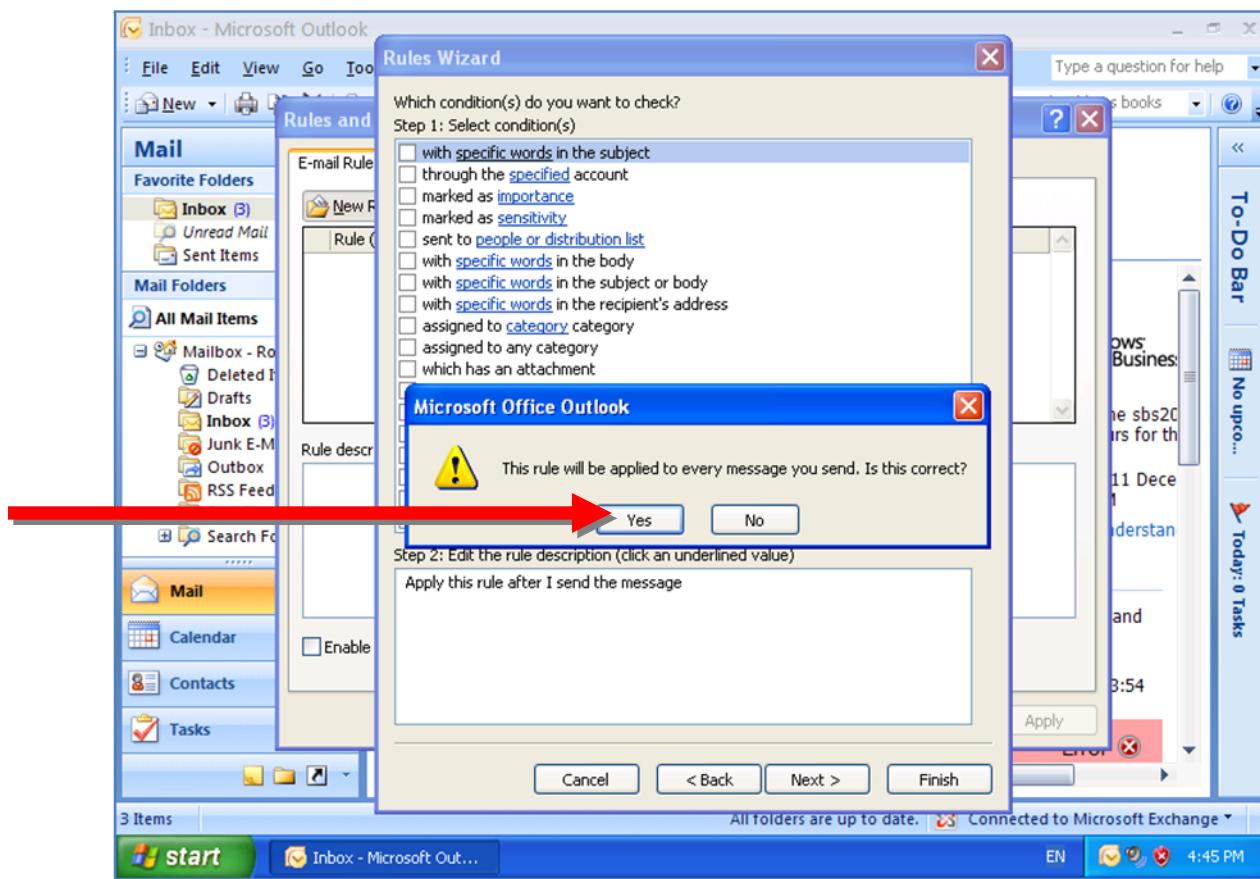
In the **Rules Wizard** window select the option **Check messages after sending** which is at the bottom of the list under the *Start from a blank rule* section.



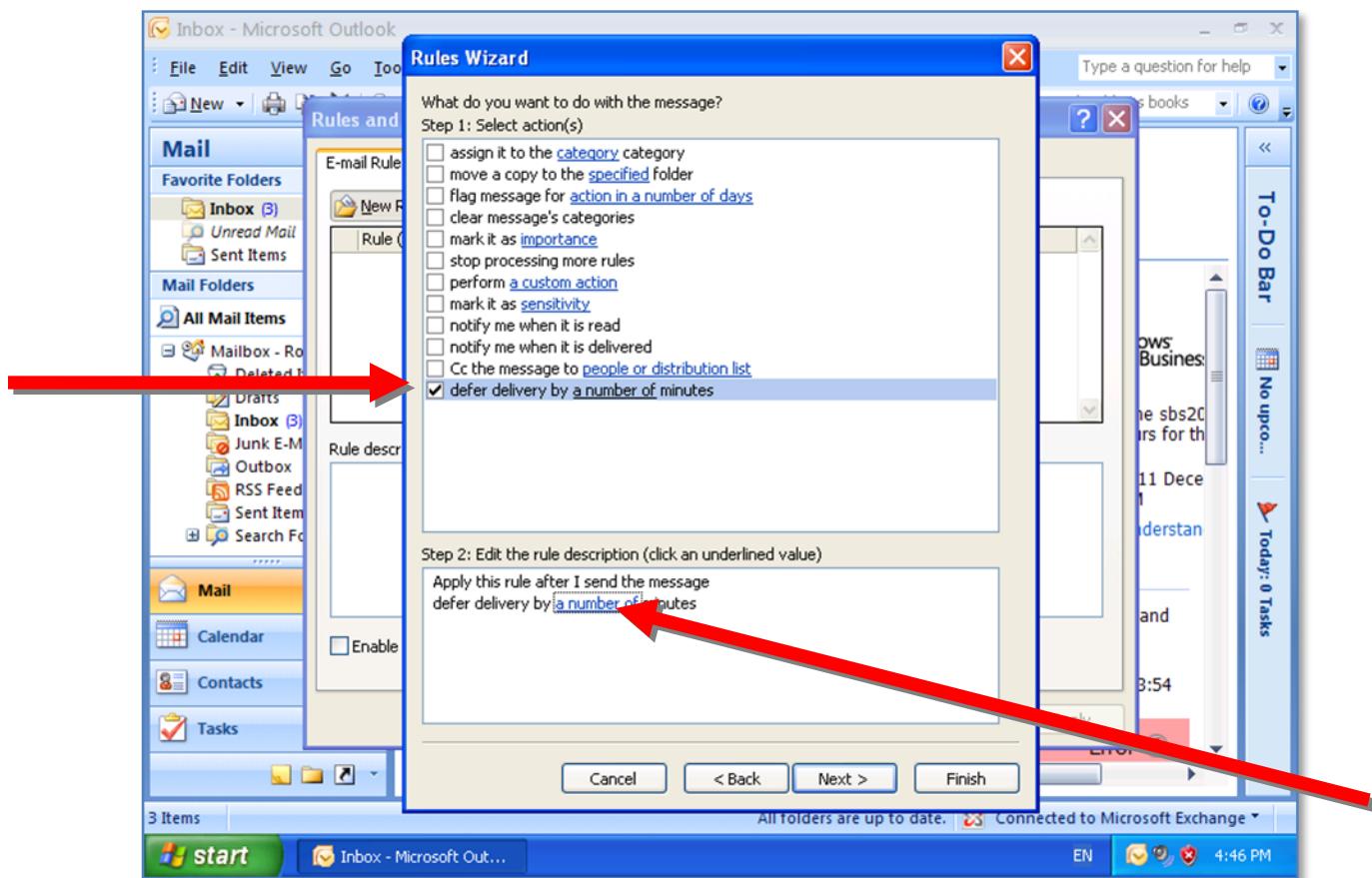
With the *Check messages after sending* selected, press the **Next** button.



Do not make any selection for in the *Step 1: Select condition(s)* area at the top of the window, simply press the **Next** button.

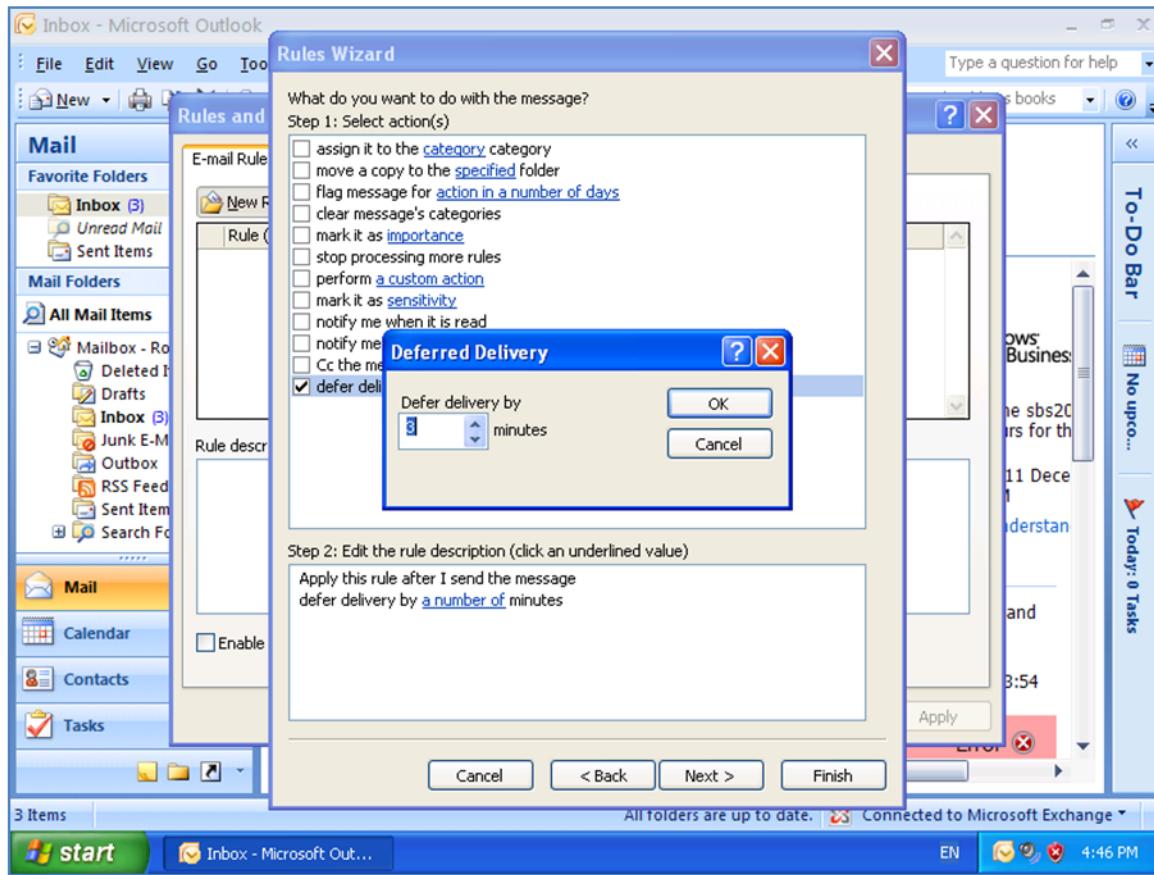


Since no selection was made you are prompted whether you wish the rule to apply to all email messages you send. Click the **Yes** button.



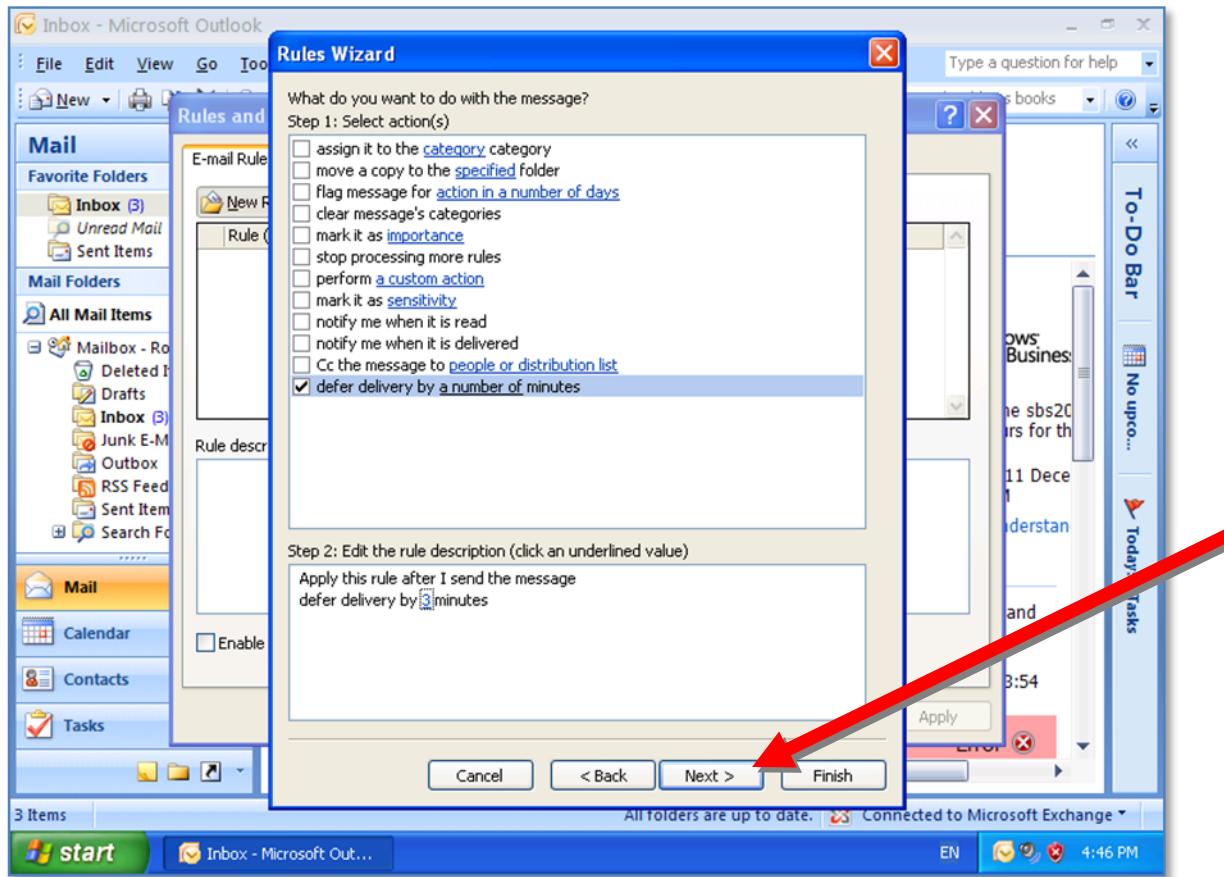
From the list that now appears select the option **defer delivery by a number of minutes** by clicking once in the box on the left hand side of this option. After clicking a tick should appear in the box.

You will also see that this action has been transferred to the lower *Step 2: Edit the rule description* box. To define how many minutes to defer delivery **click** on the hyperlinked text *a number of minutes* in the lower *Step 2* box.



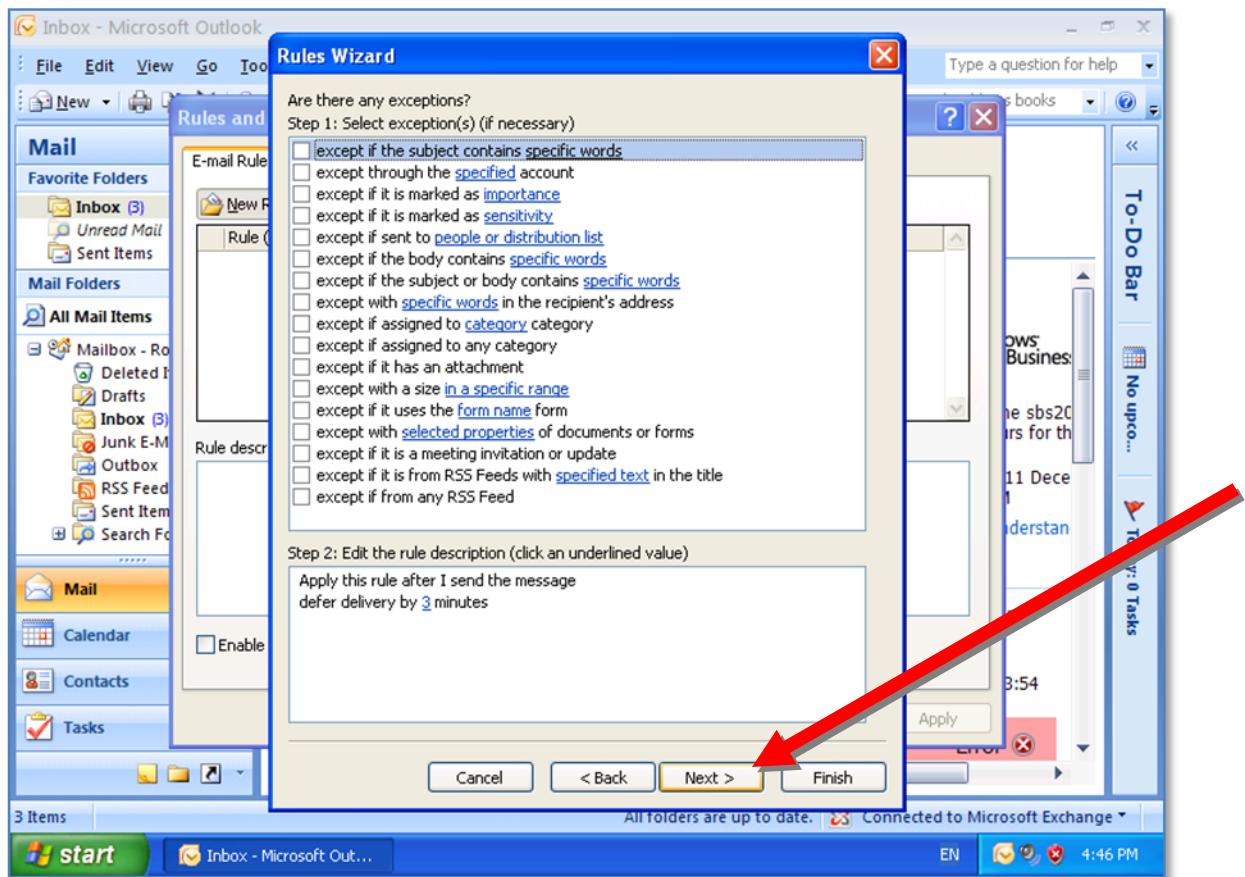
In the deferred delivery window use the arrow keys to select the number of minutes to delay delivery. A recommended value is 3 minutes.

Once selection is complete press the **OK** button.

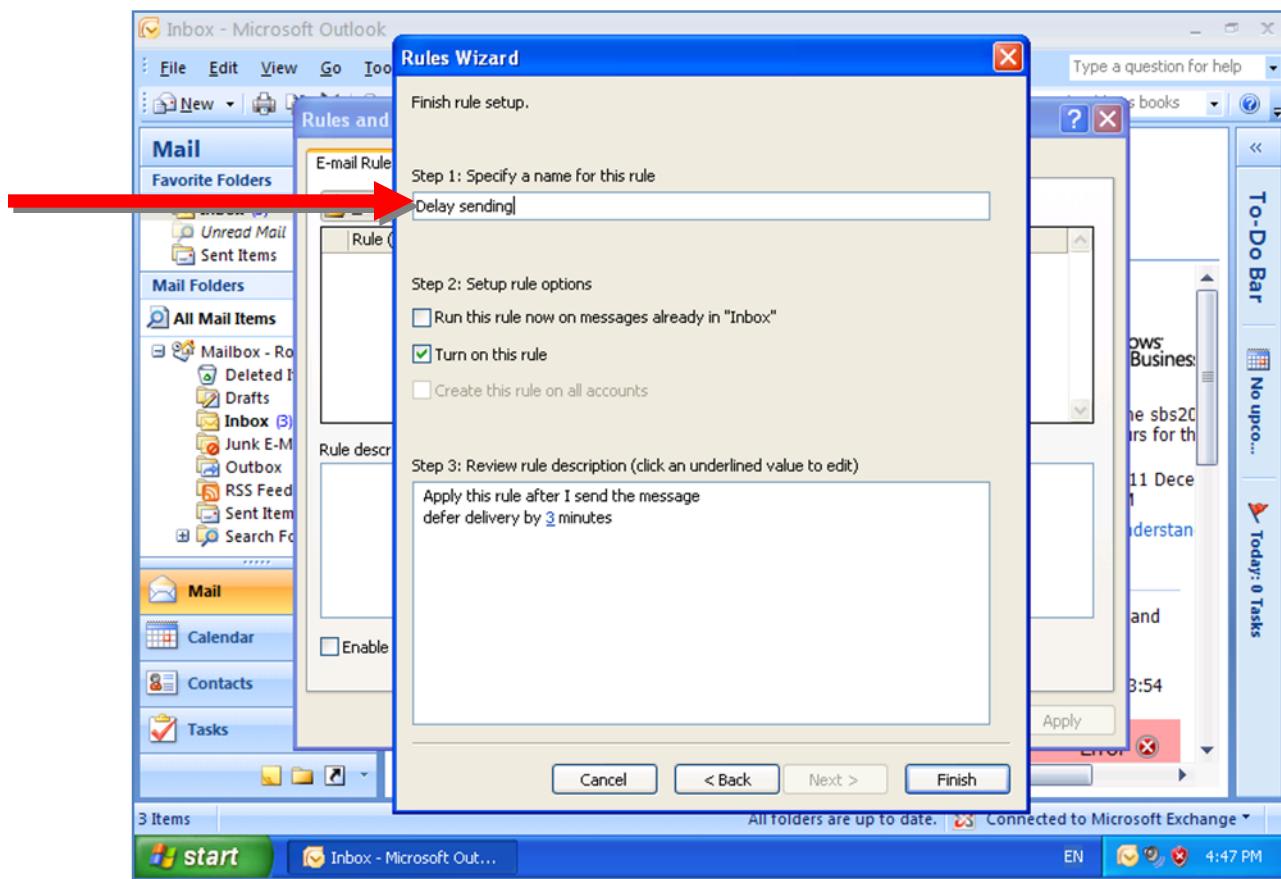


You should now see the value you selected previously appear in the lower box (in this case 3).

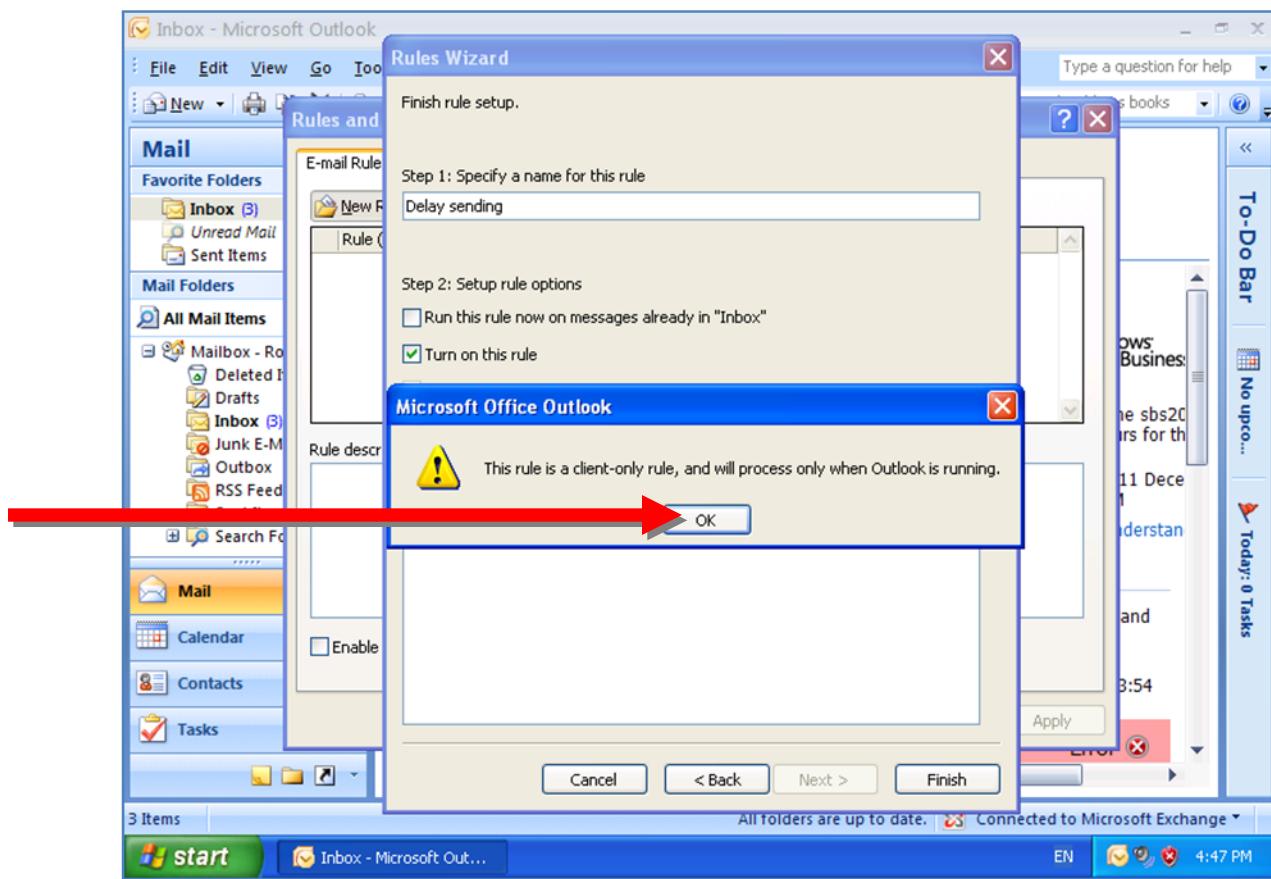
Press the **Next** button to continue.



You can now enter any exceptions to this rule you desire, however in most cases you want this rule to apply to all messages you send so simply click the **Next** button to continue.

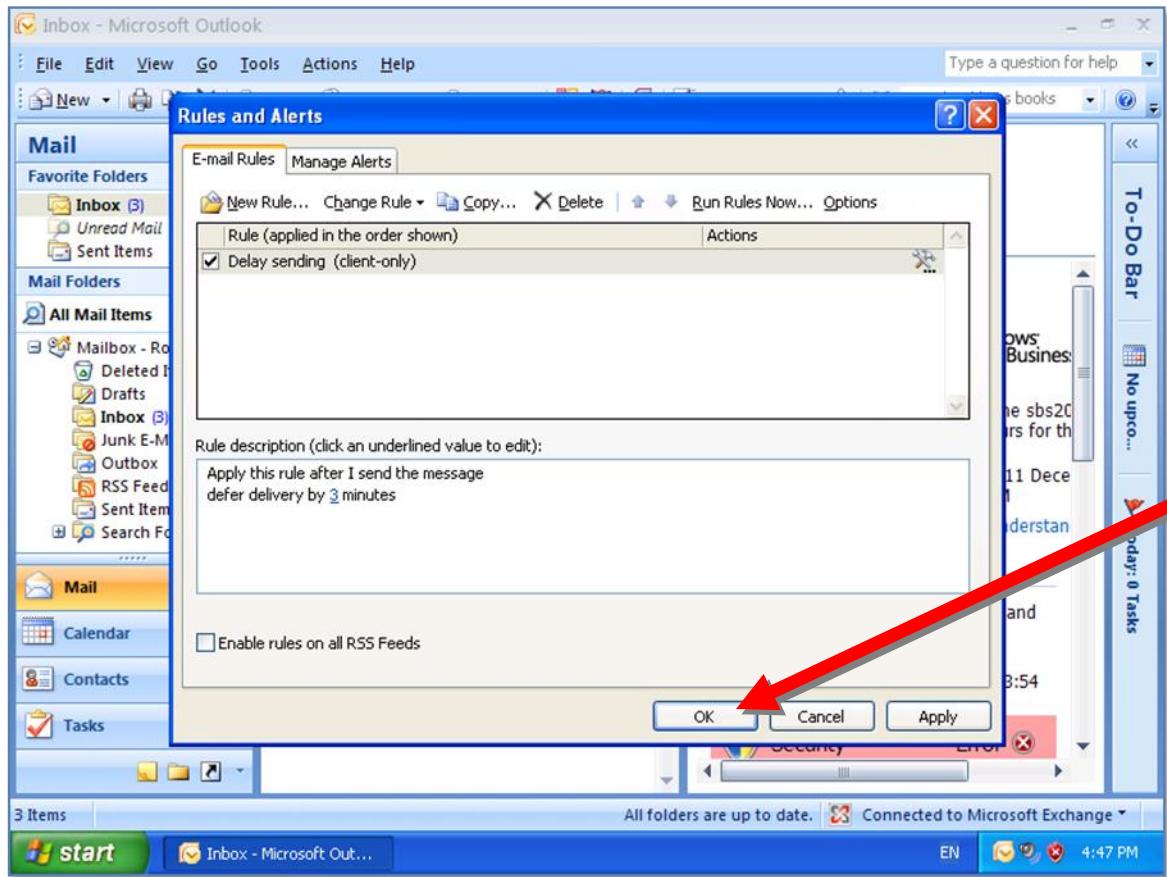


You should type in a descriptive name for this rule (in this case Delay sending) and then press the **Finish** button to complete.



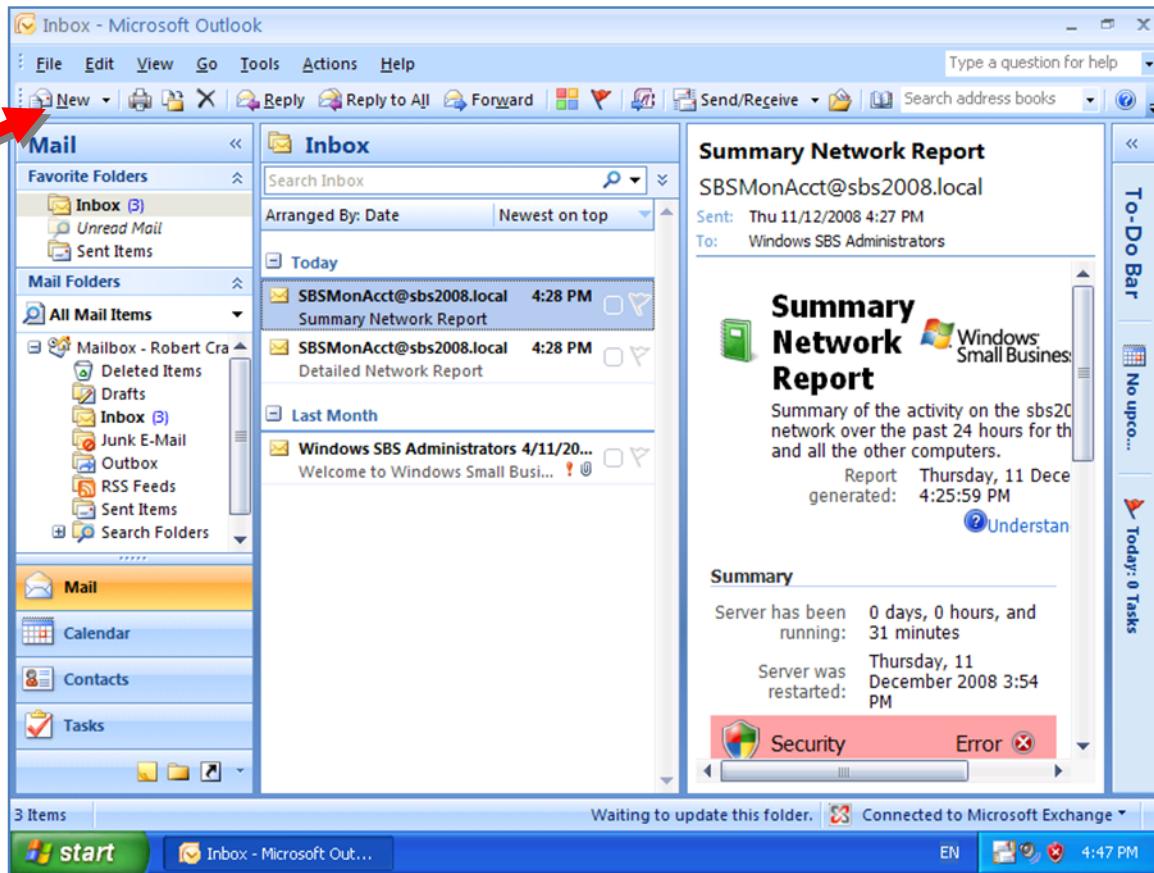
You will receive a warning that this rule is client-only which means that if you plan to use Outlook on another physical workstation you will need to recreate the rule.

Press **OK** to continue.

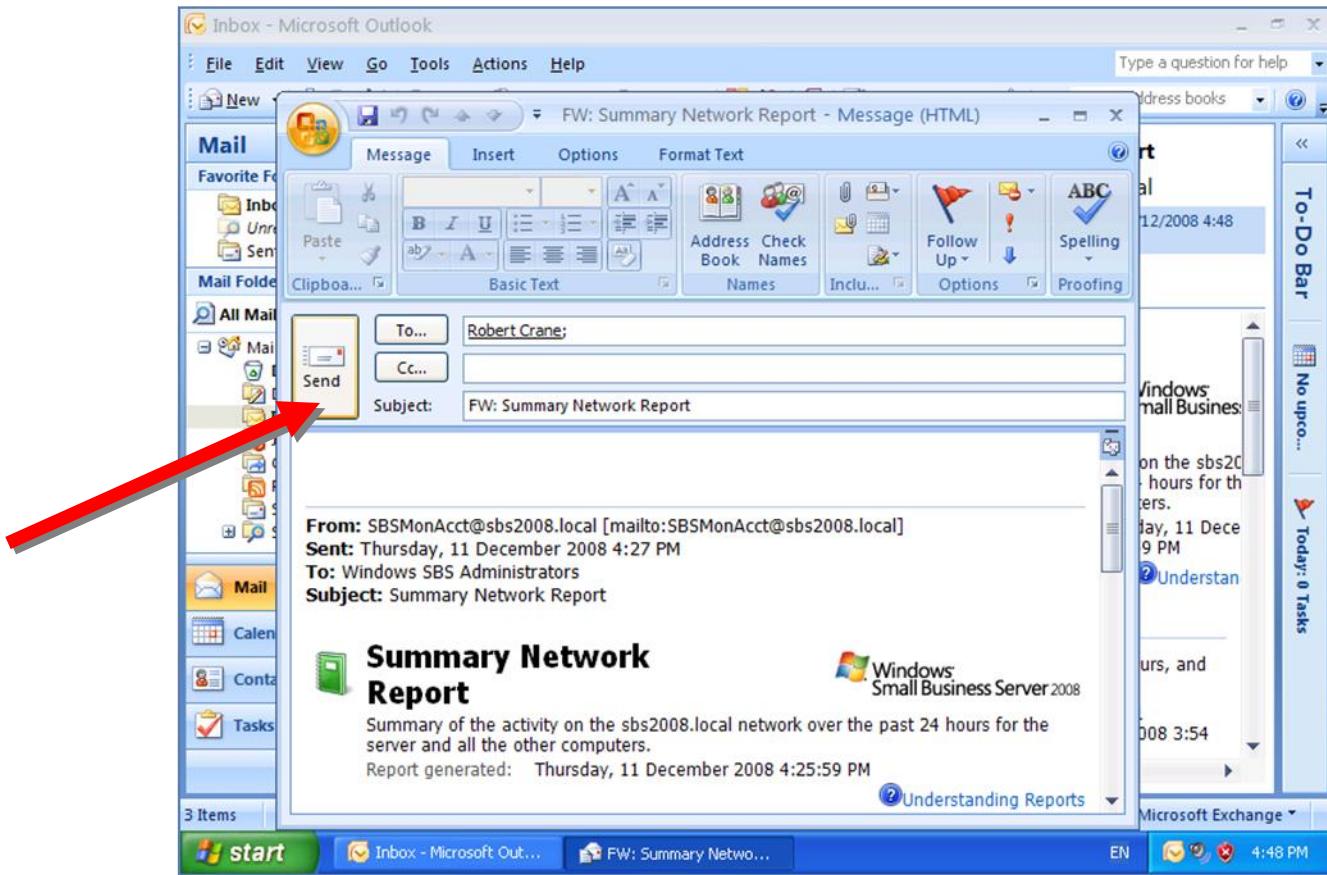


You should now see the new rule in the list of rules with a summary of its purpose in the window below.

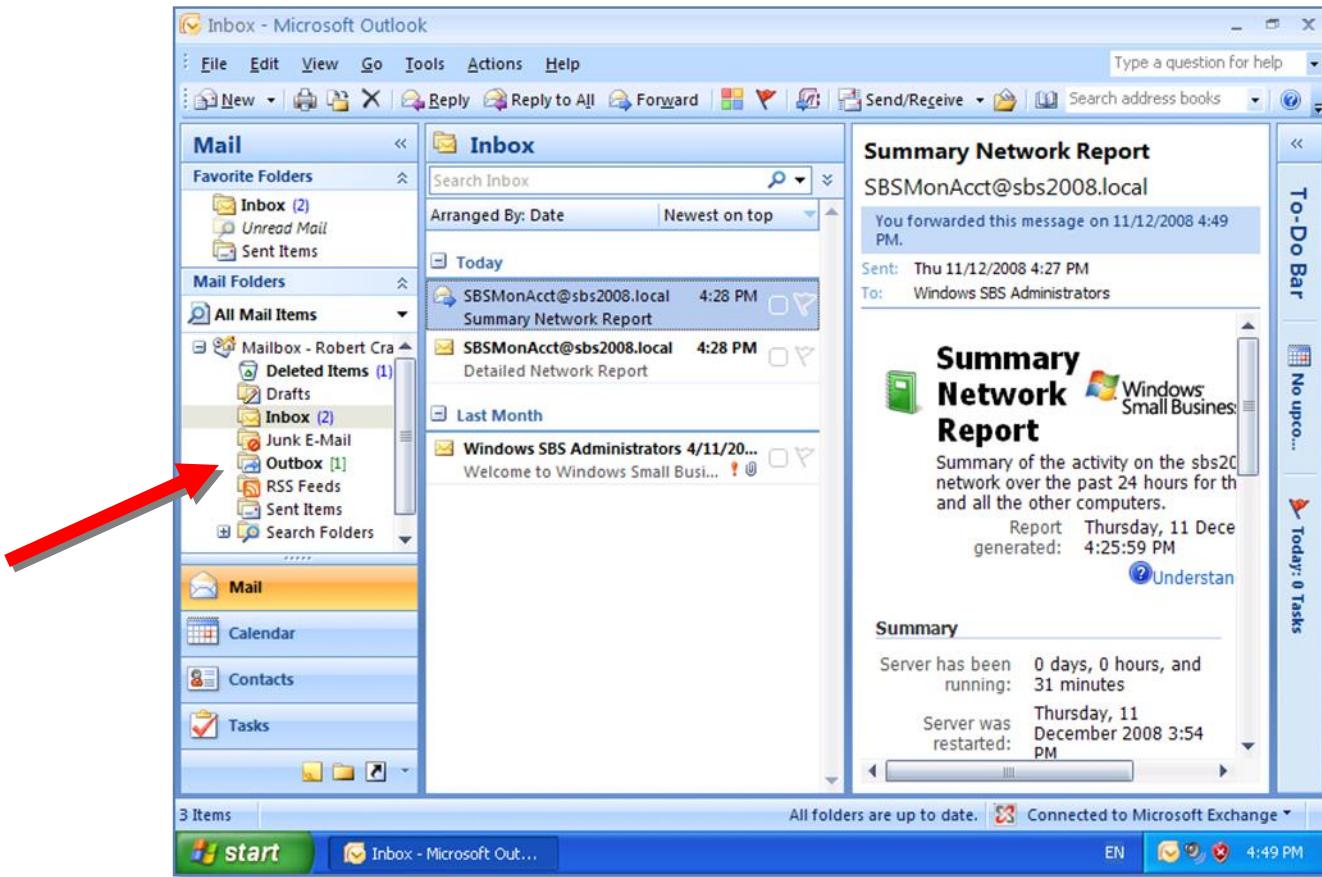
Press the **OK** button to close the rules and alerts window.



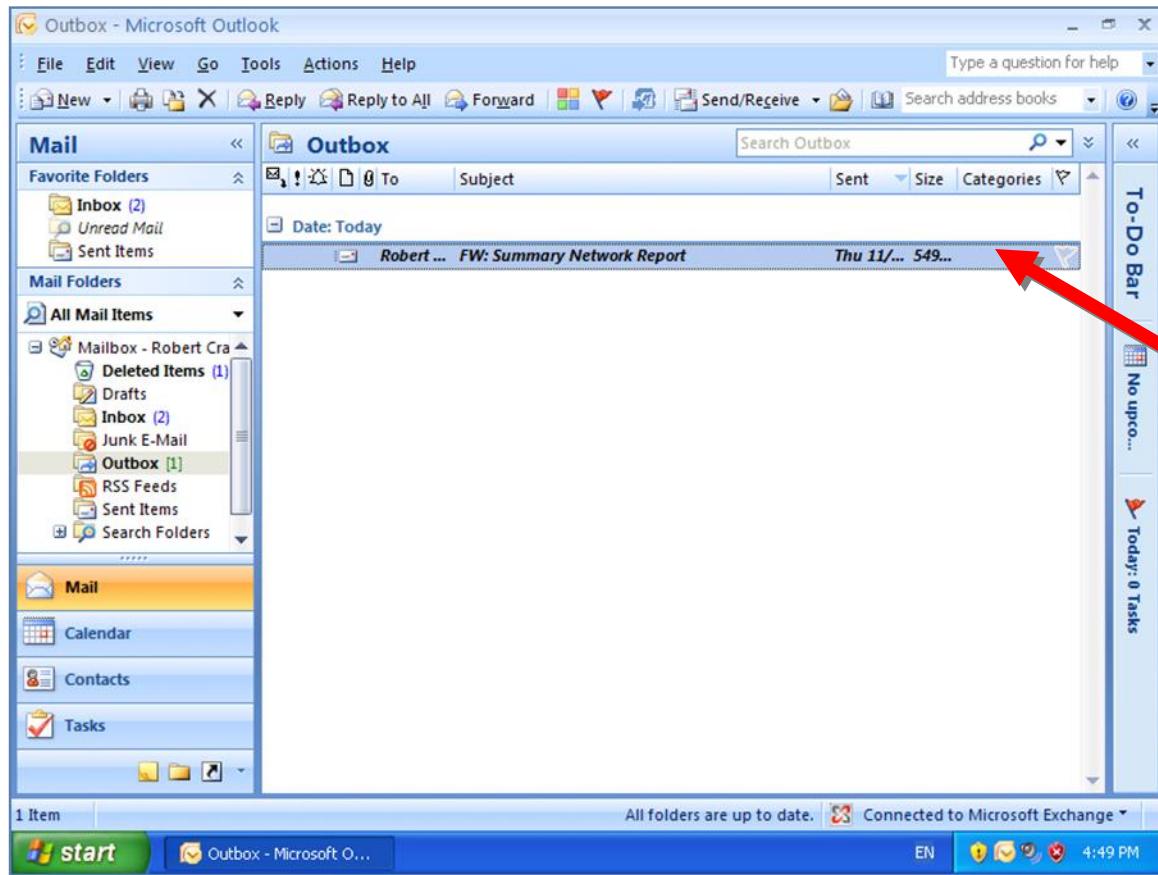
Once you have returned to the main Outlook window compose a new email.



Create the new message as you would normally and press the **Send** button.



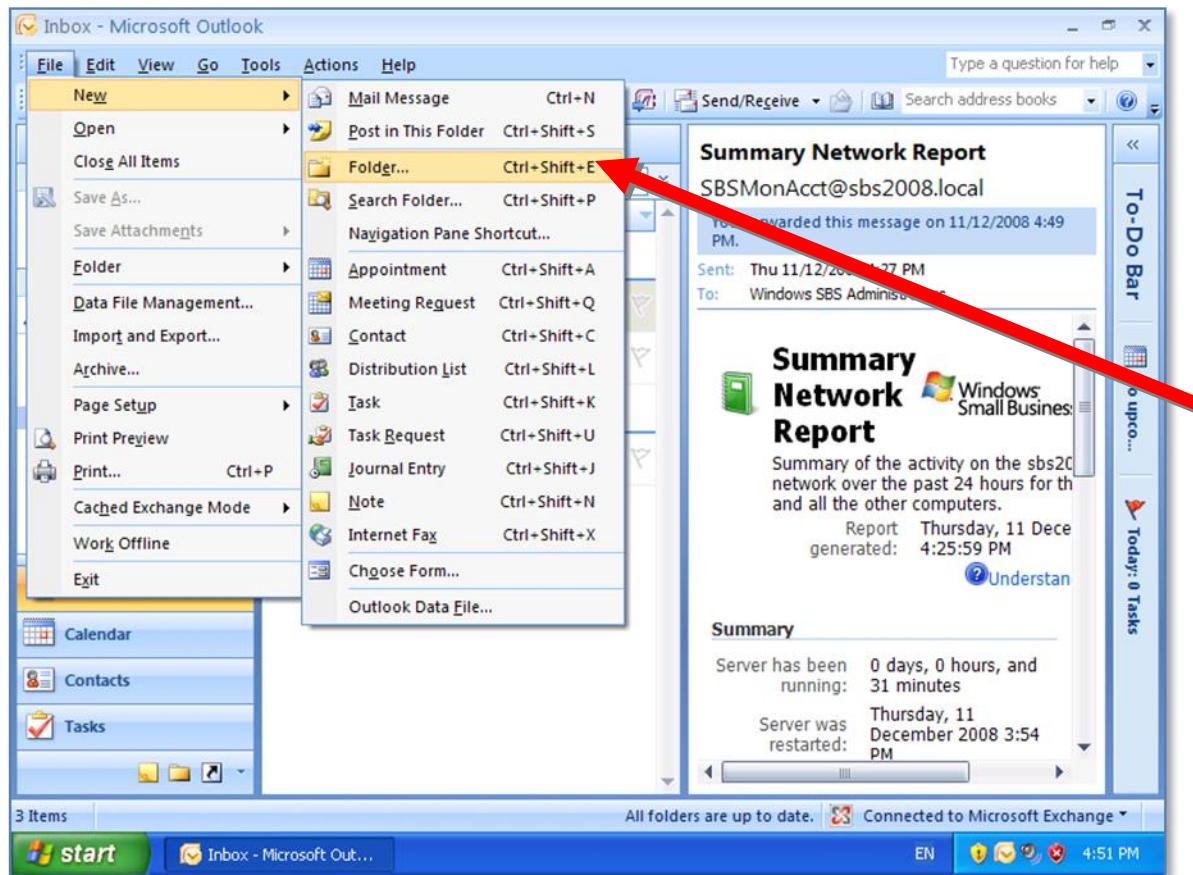
After you are returned to the main Outlook window again you will see the message you just sent remain in your *Outbox* until your specified time delay elapses.



If you select the *Outbox* you should see the message waiting to be sent. At any time prior to the message being sent you can simply select the message and use the *Delete* key to remove it from your *Outbox* or simply double click on the message to edit it.

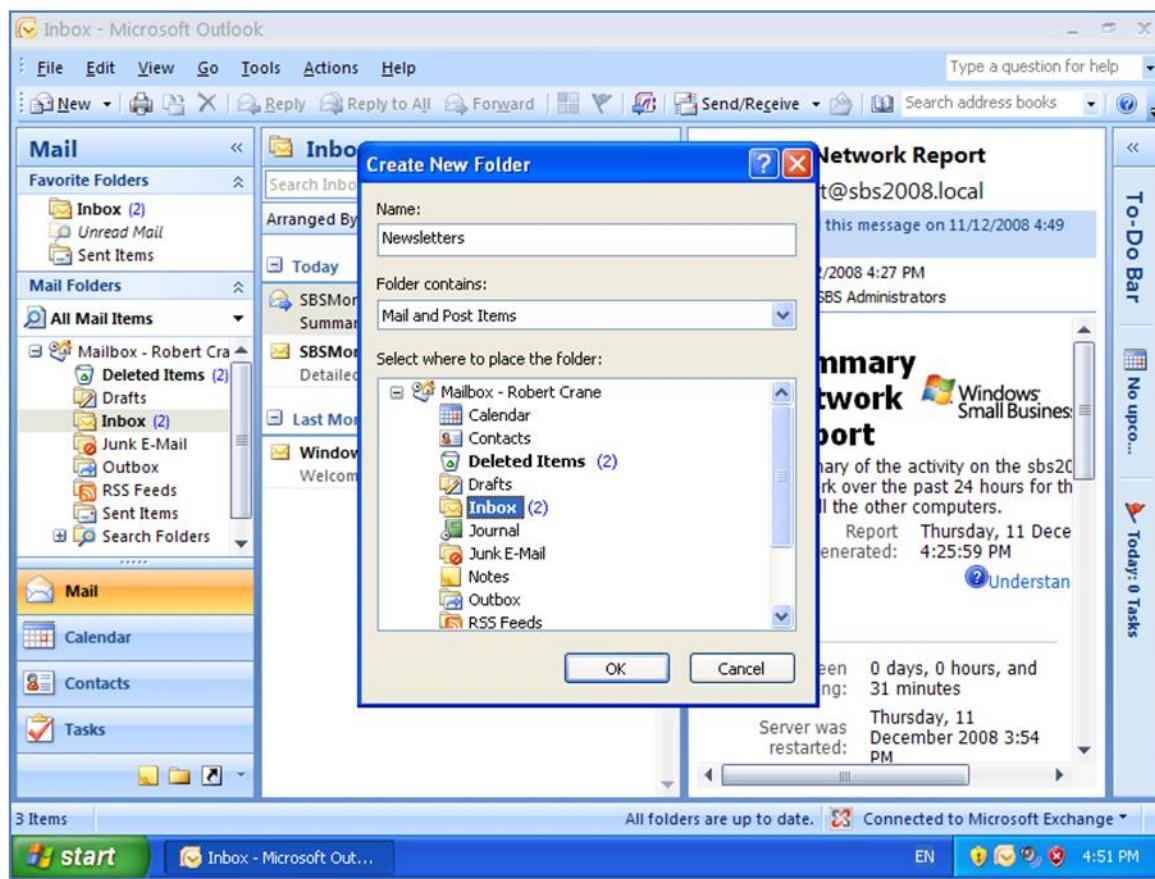
3. Inbox size

By default all new emails are delivered to the Inbox. Unless action is taken the Inbox can become very full very quickly. Two methods for reducing this load is via the creation of automatic rules to move emails as they arrive based on some criteria and to secondly configure auto archiving.



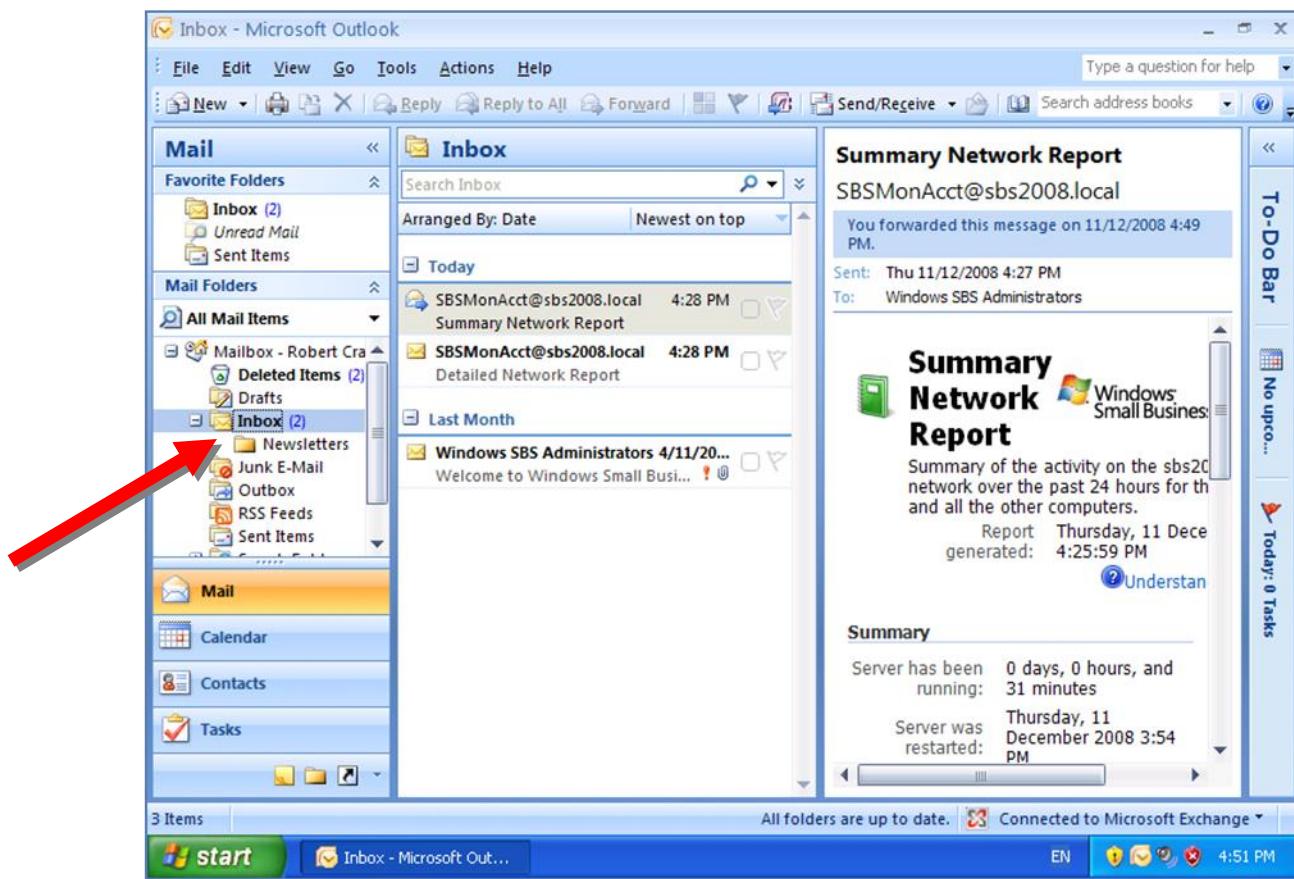
To create a sub folder below your *Inbox*, with Outlook open select **File**, **New** then **Folder**.

The psychiatrist who coined the informal term Attention Deficit Trait (ADT) to describe this phenomenon [Infomania] is Dr. Edward Hallowell. He asserts that the cognitive impact of Infomania causes people to work well below their full potential. They produce less output, think superficially, and generate fewer new ideas – despite working an increasing number of hours. There is also evidence showing an increase in error rates, including errors in management decision-making.
(<http://firstmonday.org/htbin/cgiwrap/bin/ojs/index.php/fm/article/viewArticle/1973/1848>)



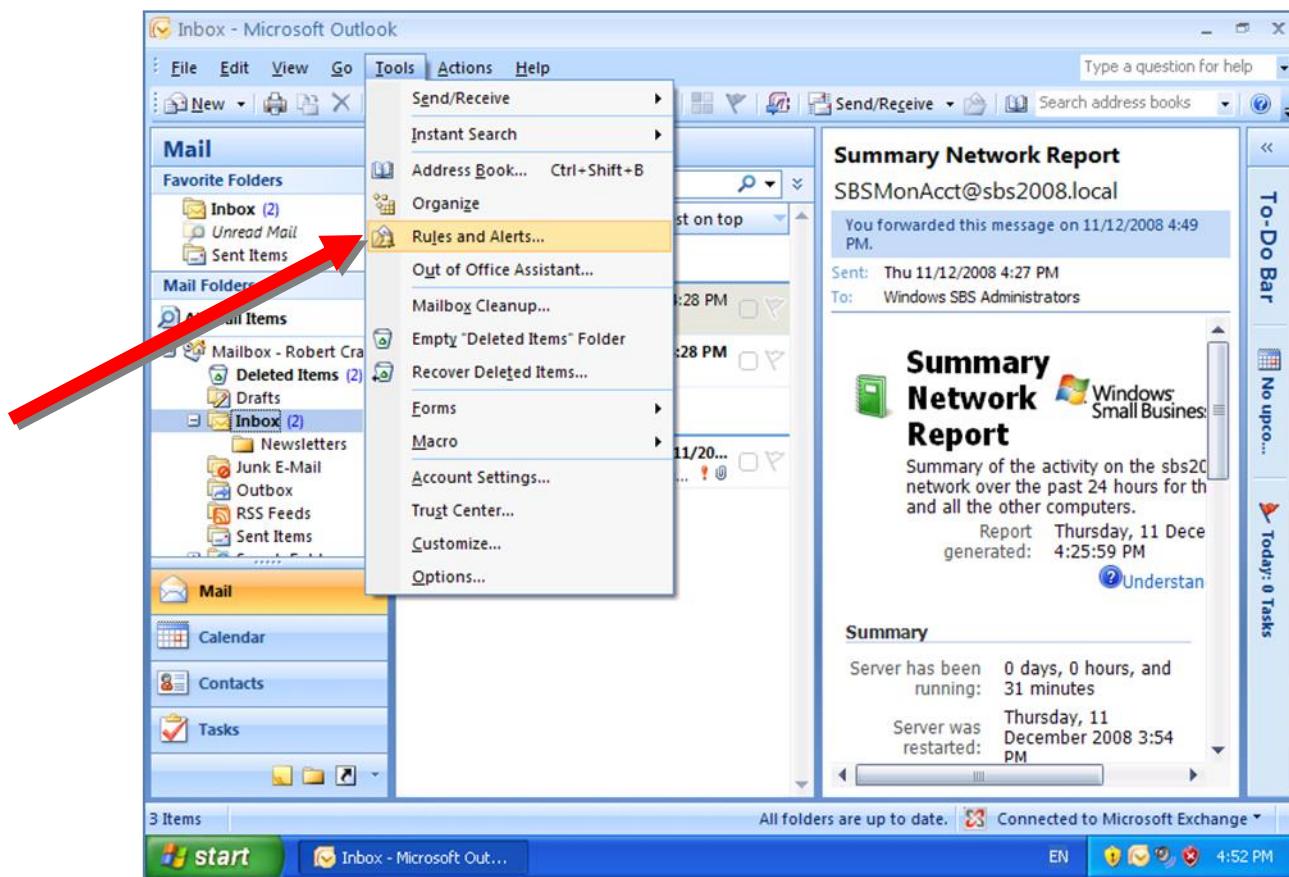
Enter the name of the new folder (in this case *Newsletters*) and indicate where the new folder will be located (in this case under the *Inbox*). Also ensure that the option *Folder Contains* option is set to *Mail and Post Items*.

Press the **OK** button to proceed.

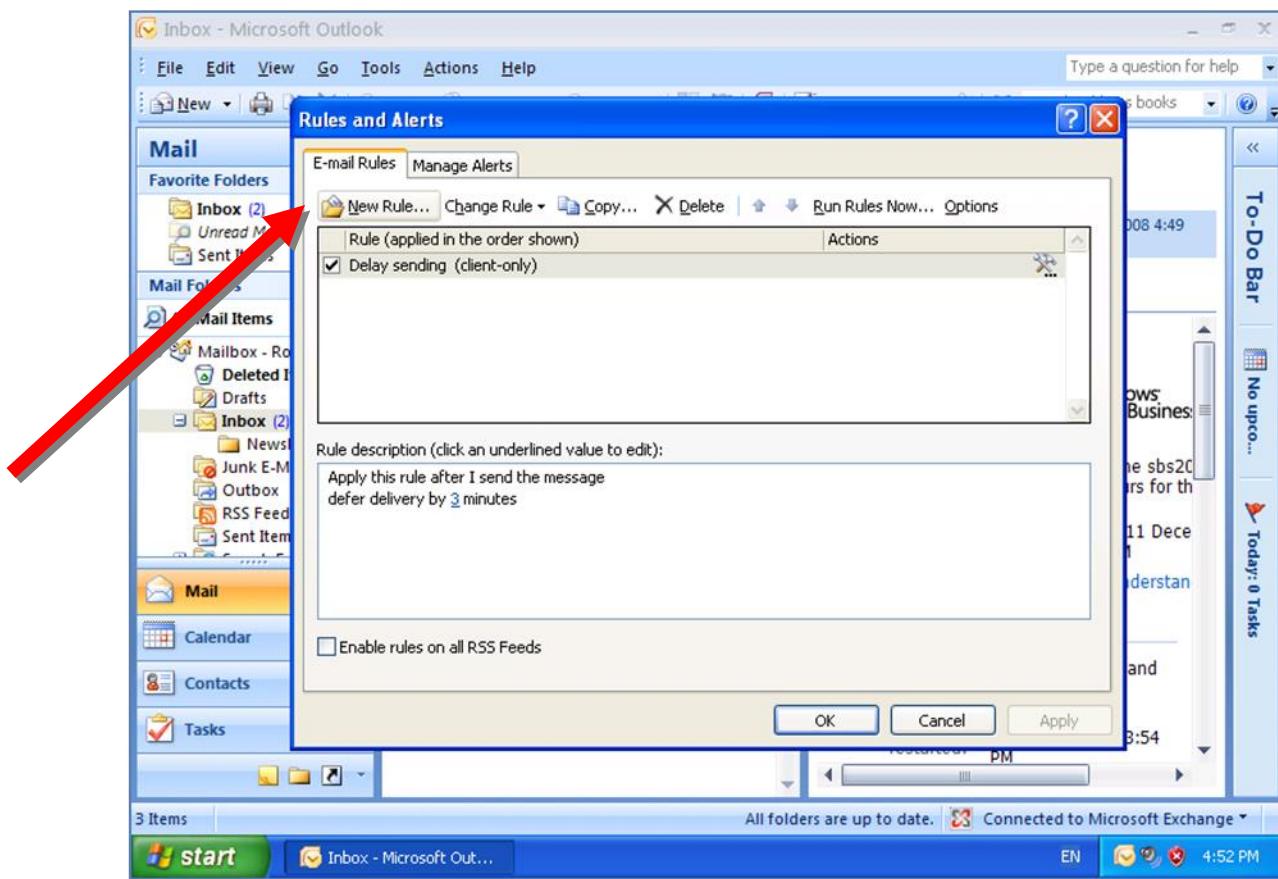


You should now see a small + sign next to the folder where you created the subfolder (in this case the *Inbox*). Click the + sign to the left of the folder to display the subfolder.

You may drag and drop items from other folders into this folder but the greatest benefits of sub folders are when they are used to automatically route incoming emails.

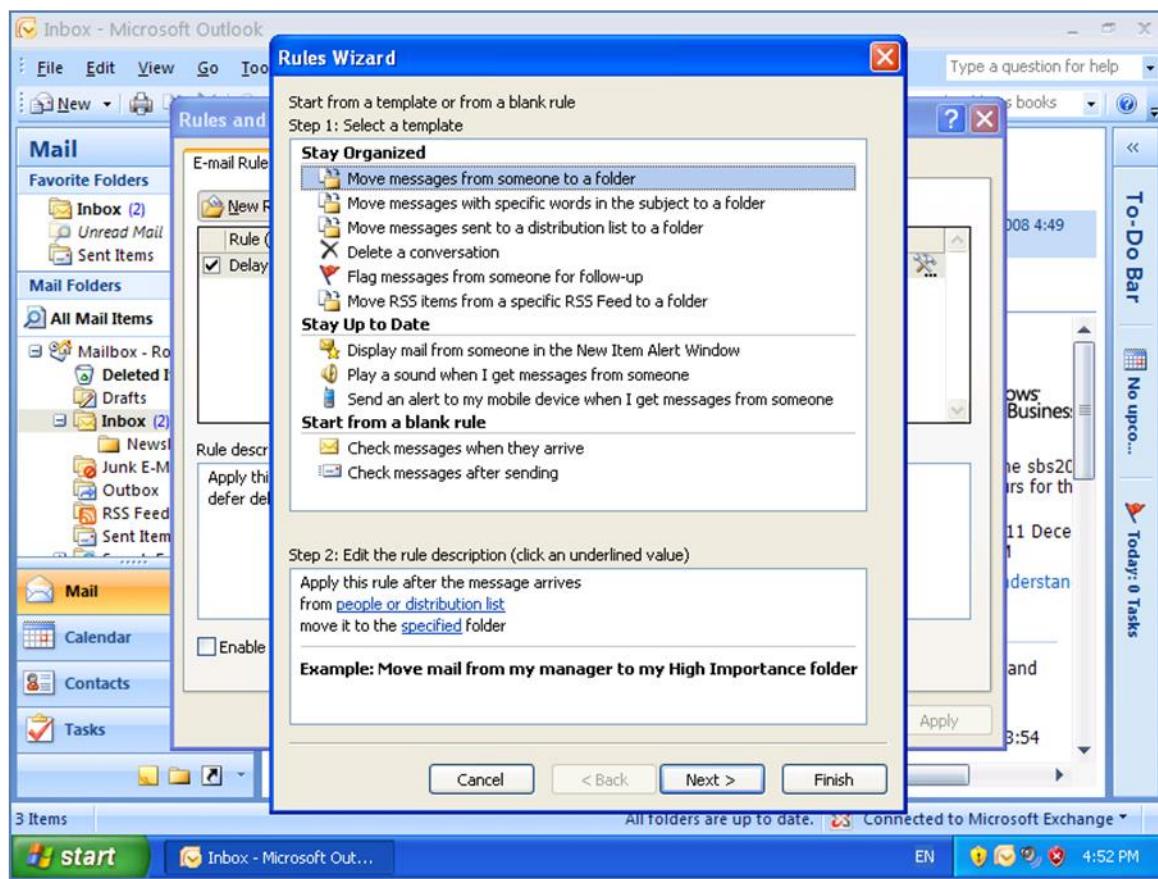


To create an automatic rule to route inbound emails complete the following steps. With Outlook open, select **Tools** then **Rules and Alerts**.



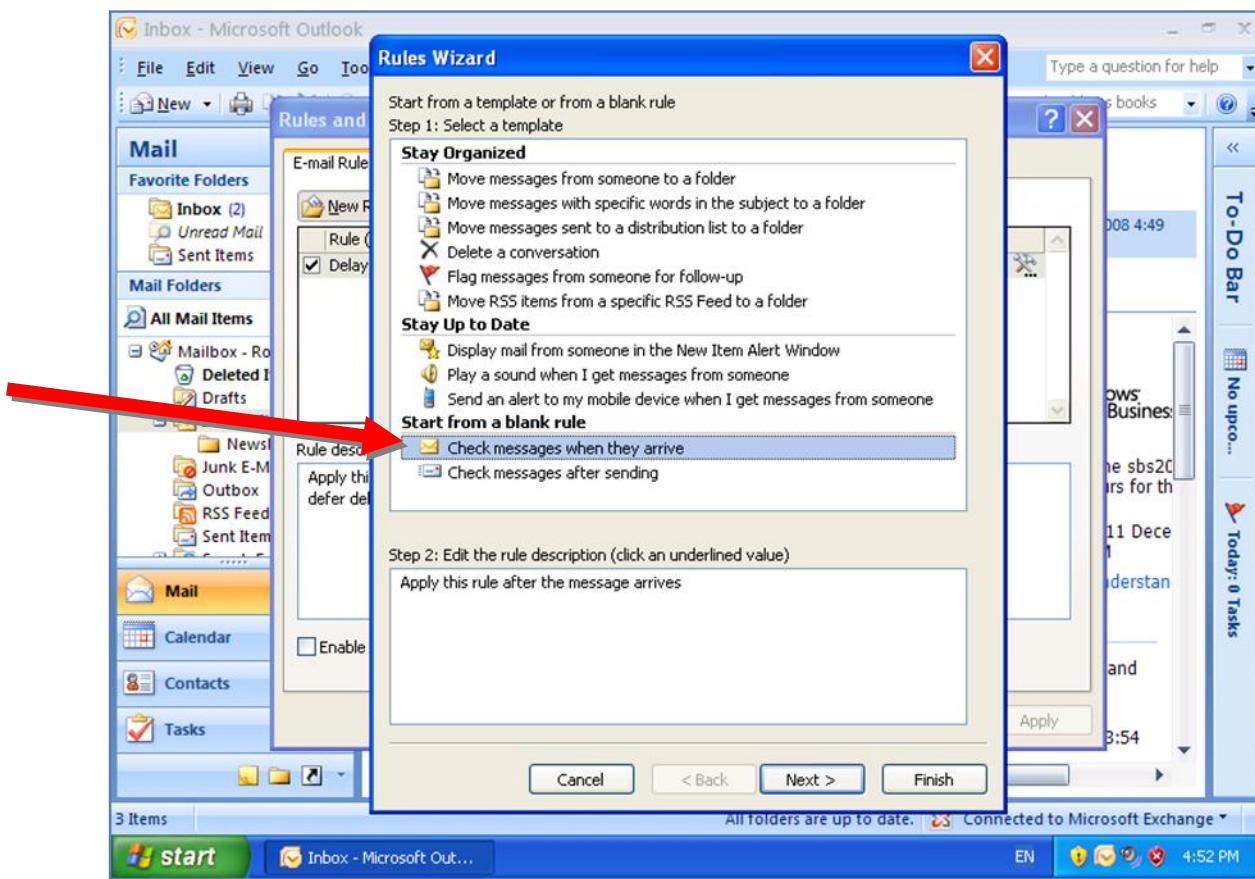
You should now see any rules that already exist.

Select the **New Rule** button from the upper left of the *Rules and Alerts* window.



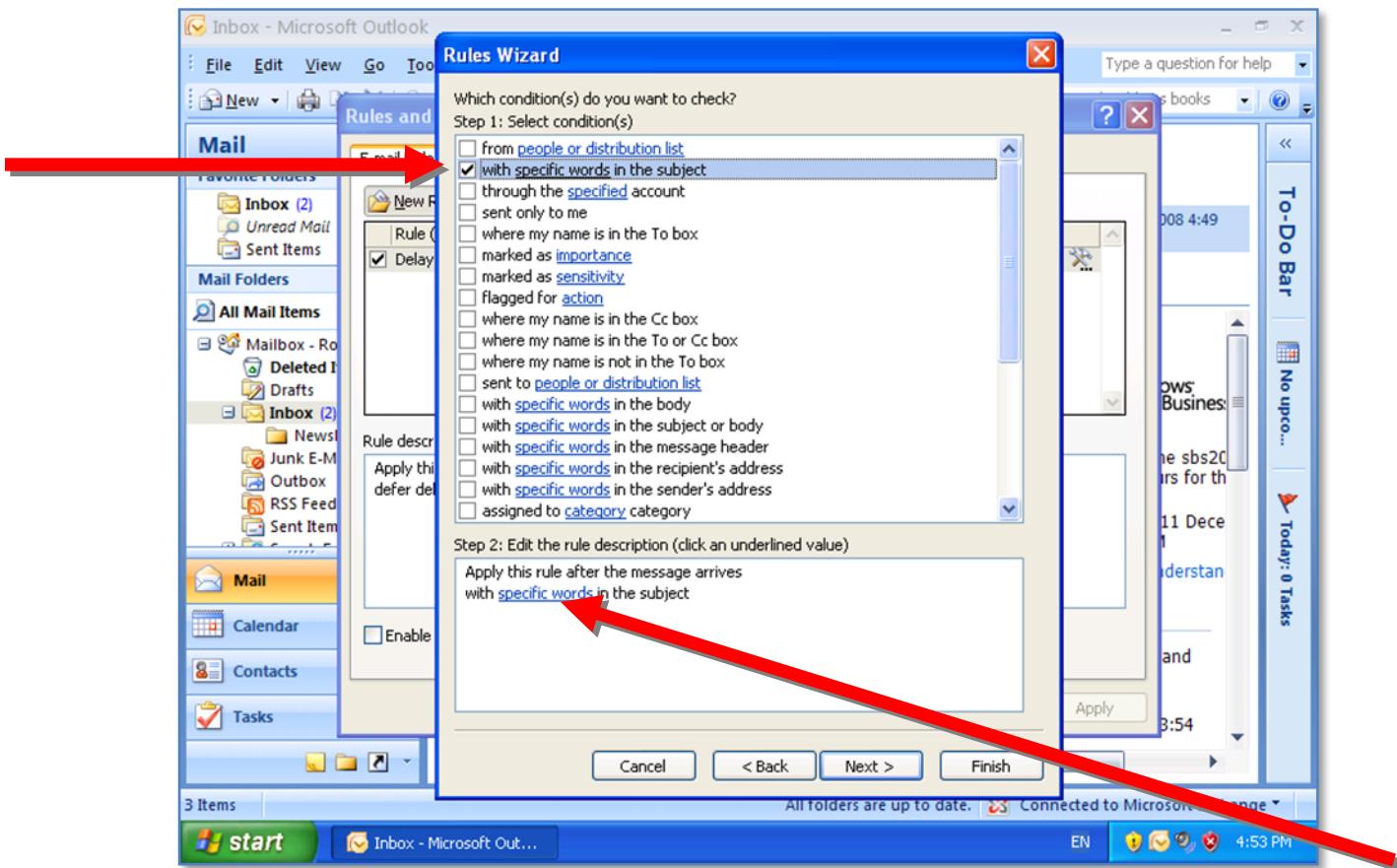
In the *Rules Wizard* window you can choose to create a rule from a pre-existing template or you can start from a blank rule.

In this case we will step through the process of creating a new rule.



Select **Check messages when they arrive** from the *Start from a blank rule* section at the lower part of the window.

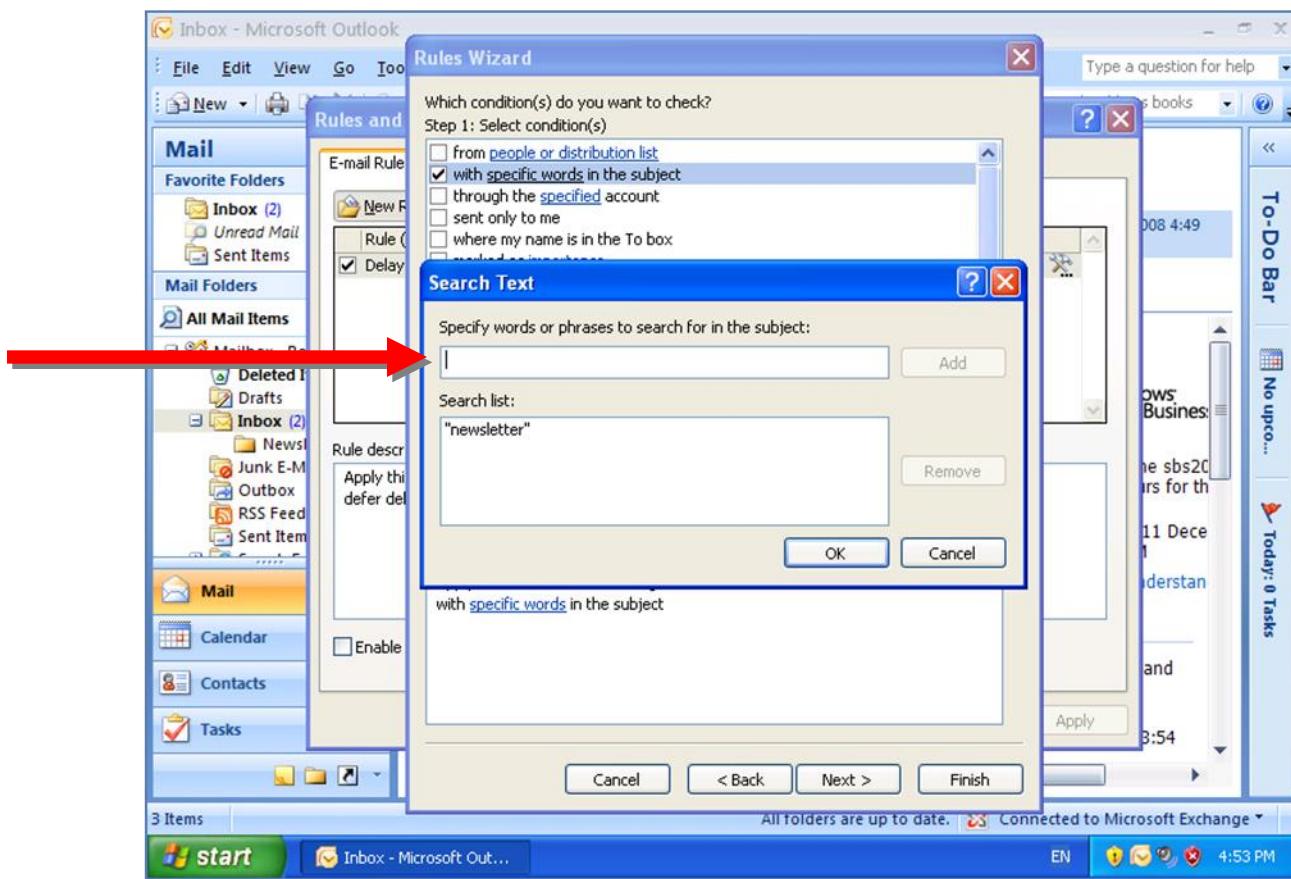
Press the **Next** button to continue.



In the upper window select the condition you wish to check. In this case we wish to check for emails *with specific words in the subject*.

Place a *tick* in the box next to the conditions you wish to check for. This rule will be transferred to lower window to allow you to enter more specific information.

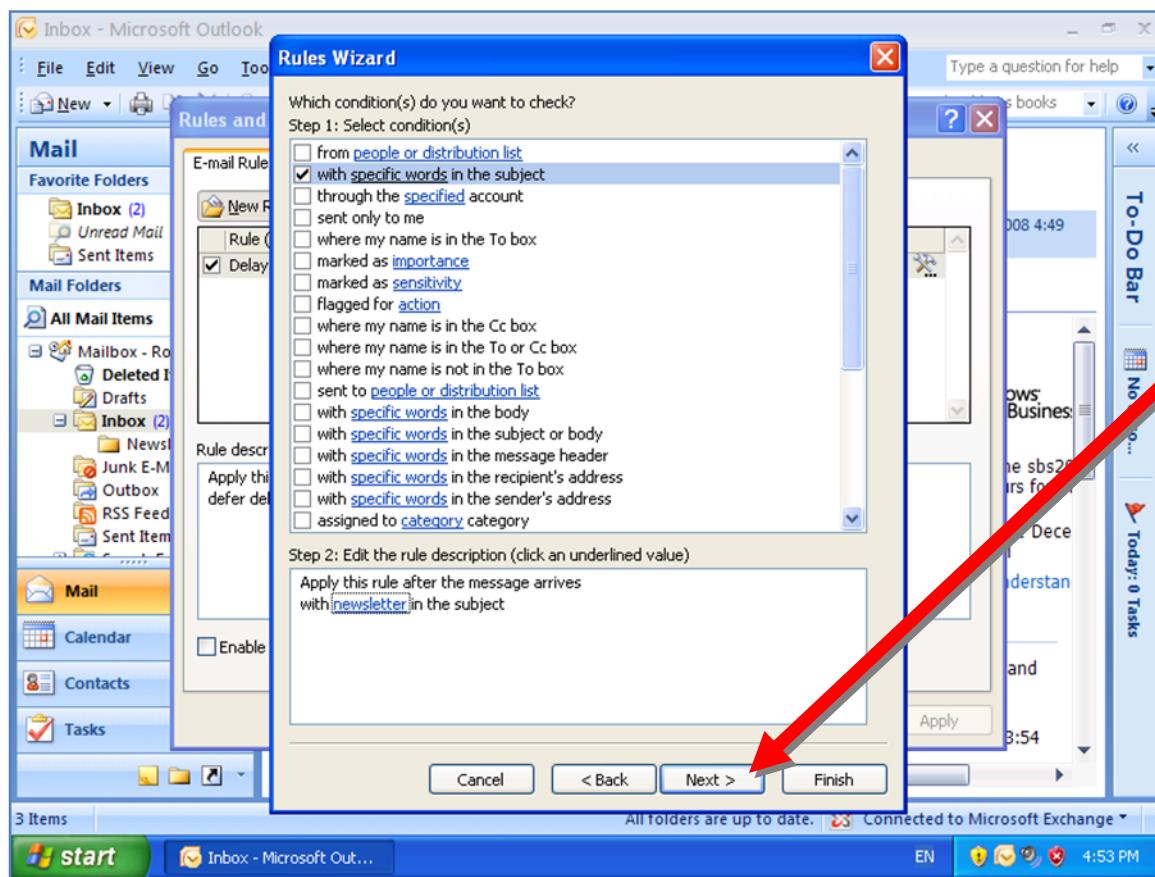
If the condition which you selected required further information you will see a hyperlink in the *Step 2* box. In this case to complete the condition we need to click the hyperlinked words '*specific words*'.



You will now be prompted to enter any additional information required. In this case we need to enter the text for the email subject we wish to search for.

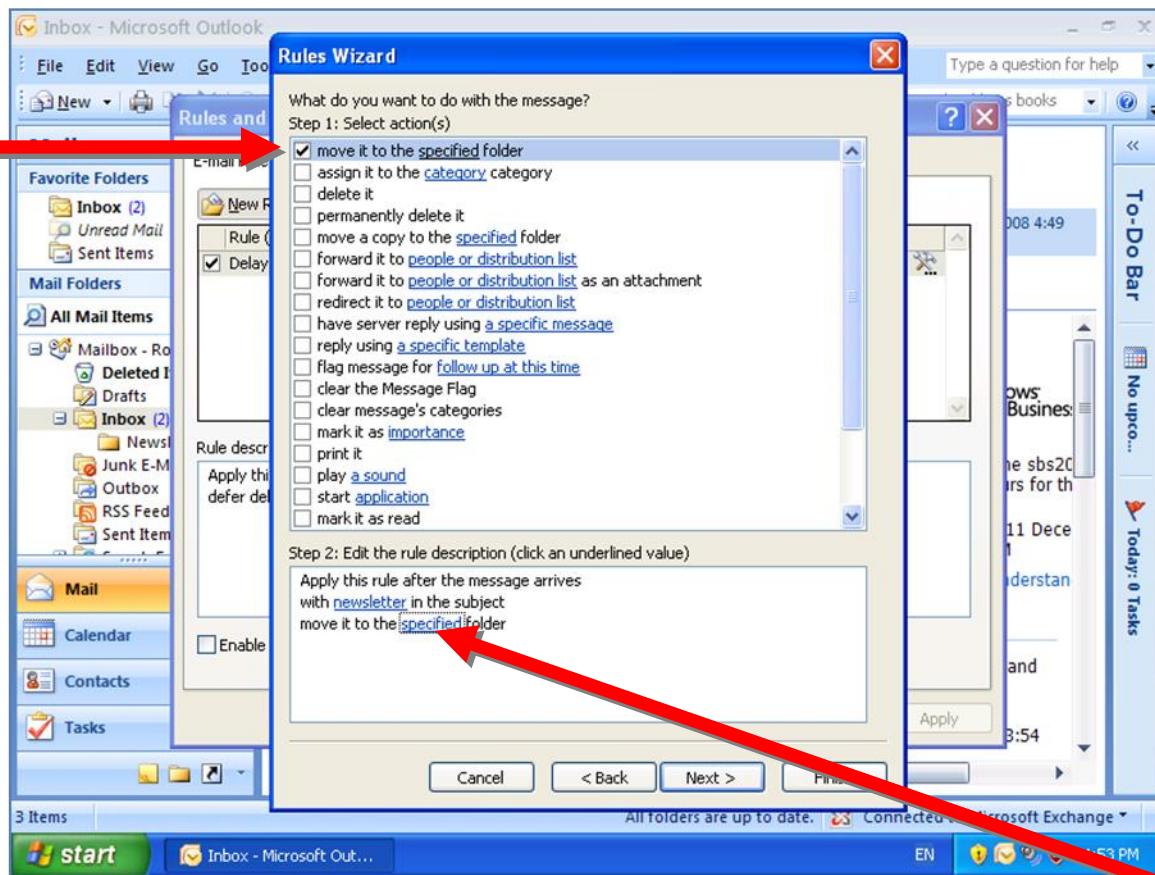
In this case we have entered '*newsletters*' in the upper line and pressed the **Add** button. We can continue to add more words or phrases as required.

When complete press the **OK** button.



You should now see the items you entered appear in the rule information in the lower *Step 2* box.

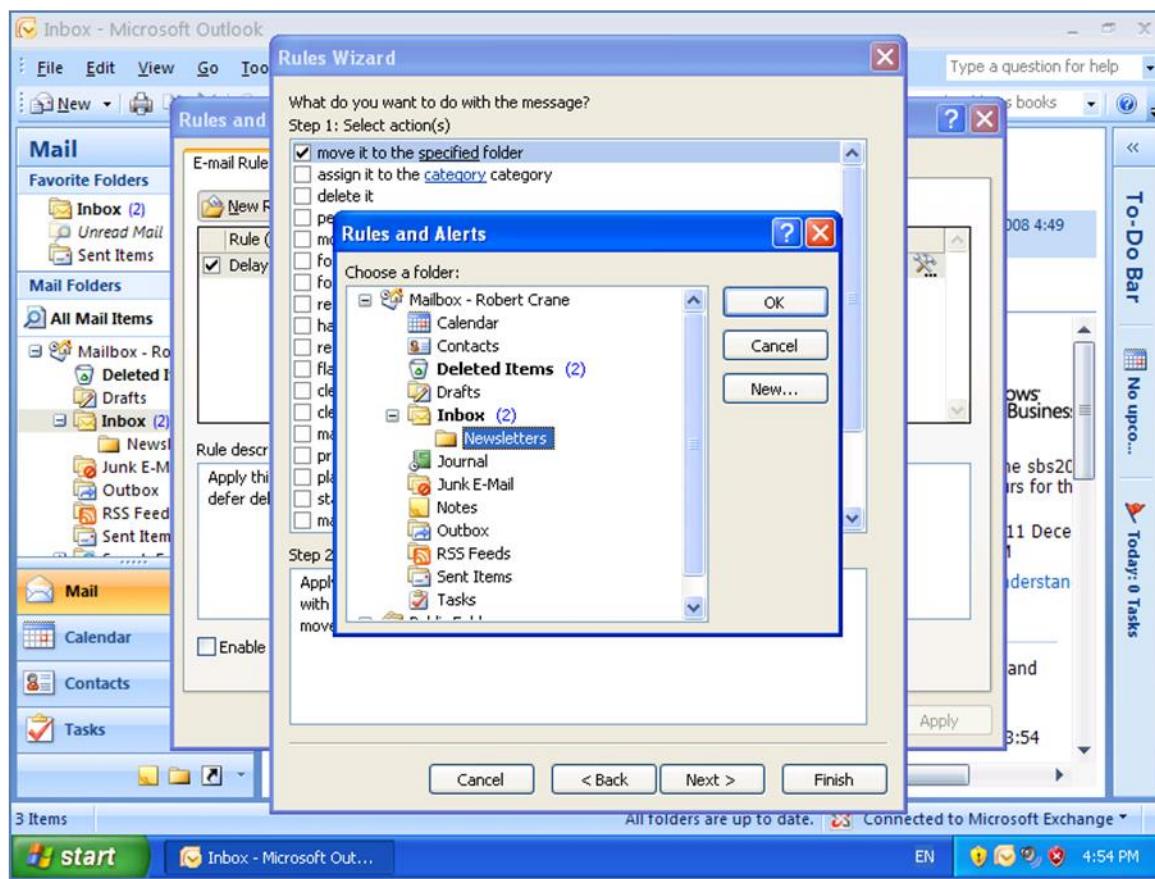
Press **Next** to continue.



The next step is what action will be taken with emails that match the criteria you just defined.

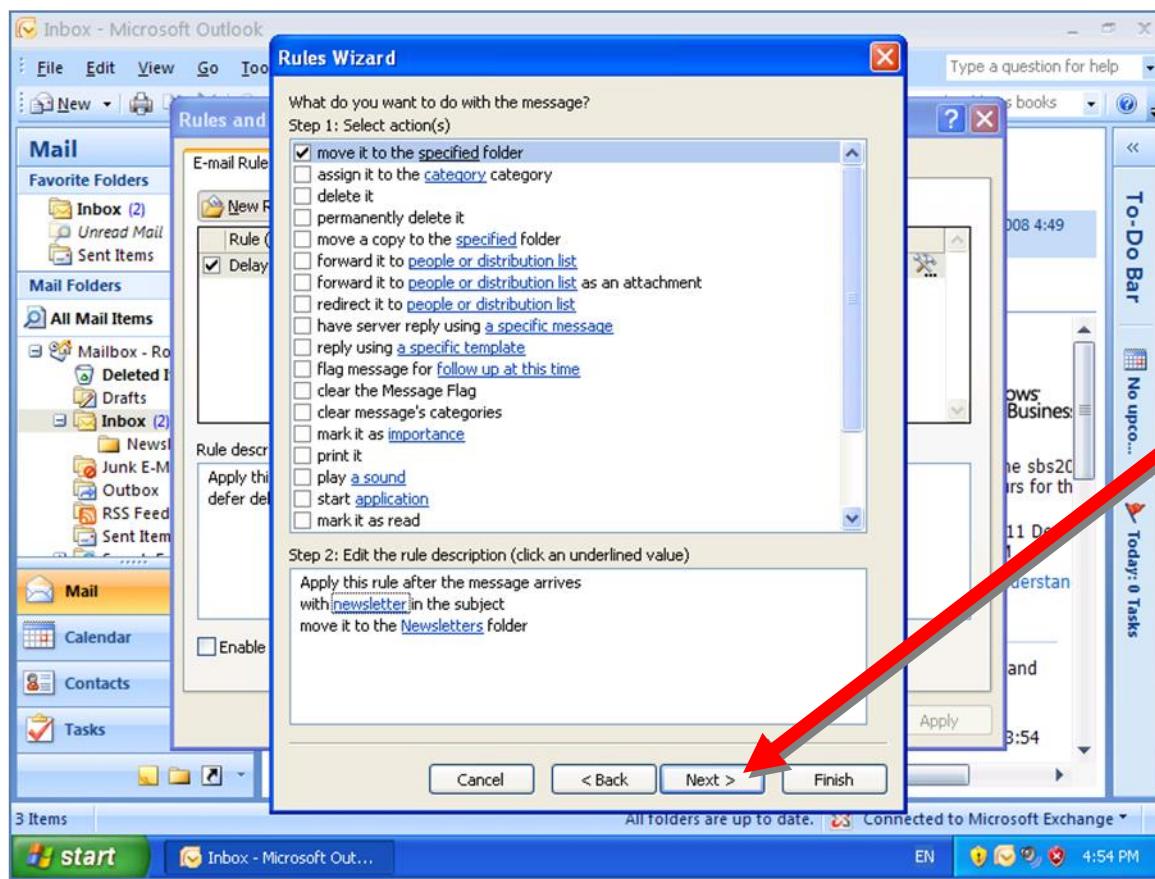
In this case we want emails that match our search criteria to be moved to the folder we have previously created. To do that we locate the appropriate action, in this case move it to the specified folder and place a *check* in the box to the left of the rule.

Once you have checked the required actions they will appear in the lower box. If additional information is required it will be highlighted via a hyperlink. In this case we need to specify which folder the emails that match our criteria will be delivered to so we click the hypertext specified to set this.



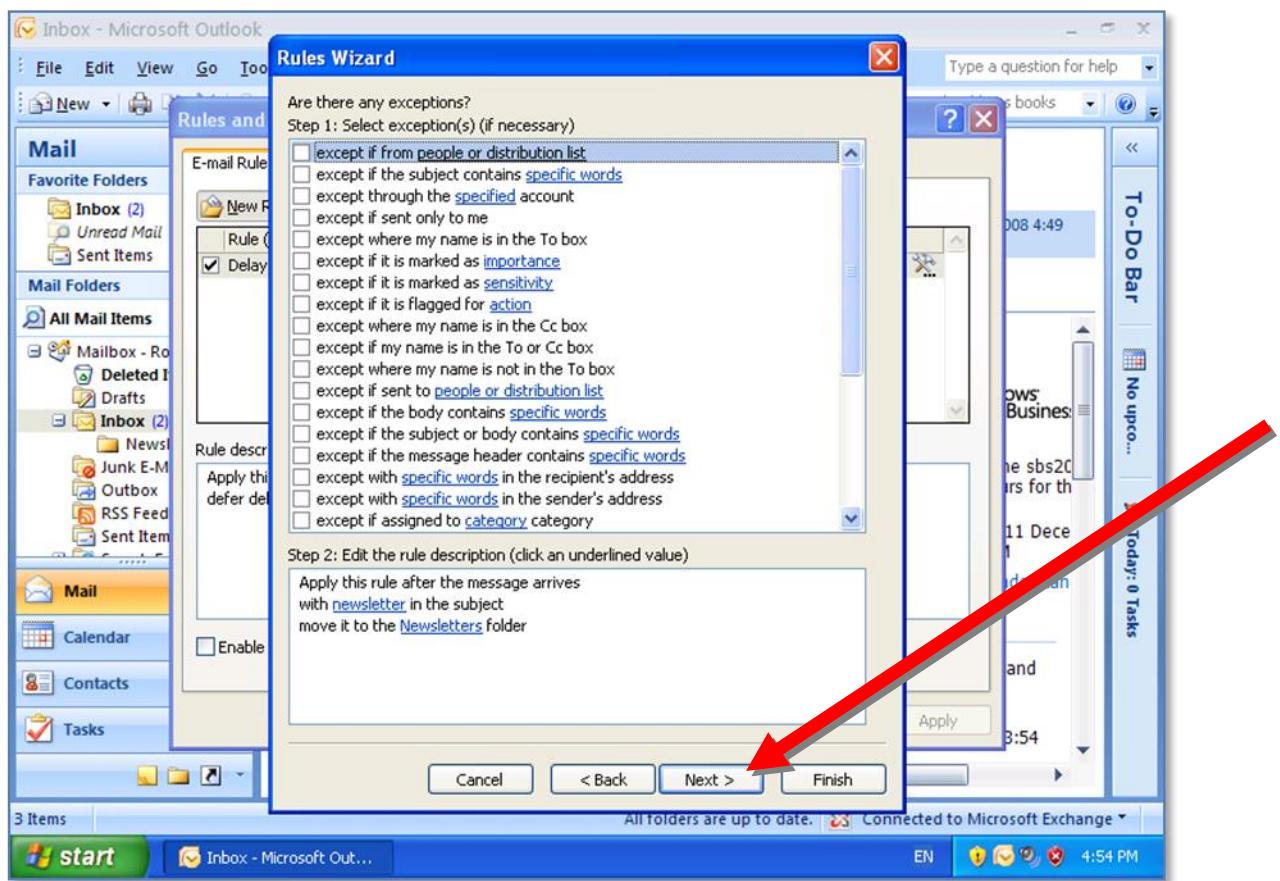
A window will now appear showing all the folders in our mailbox. Locate the folder where you desire the email to be delivered to. In this case it will be delivered to a folder *Newsletters* which appears under the *Inbox*.

Simply locate the desired destination folder, click on it to select and then press the **OK** button.



The folder you selected should now appear in the rule description in the lower window.

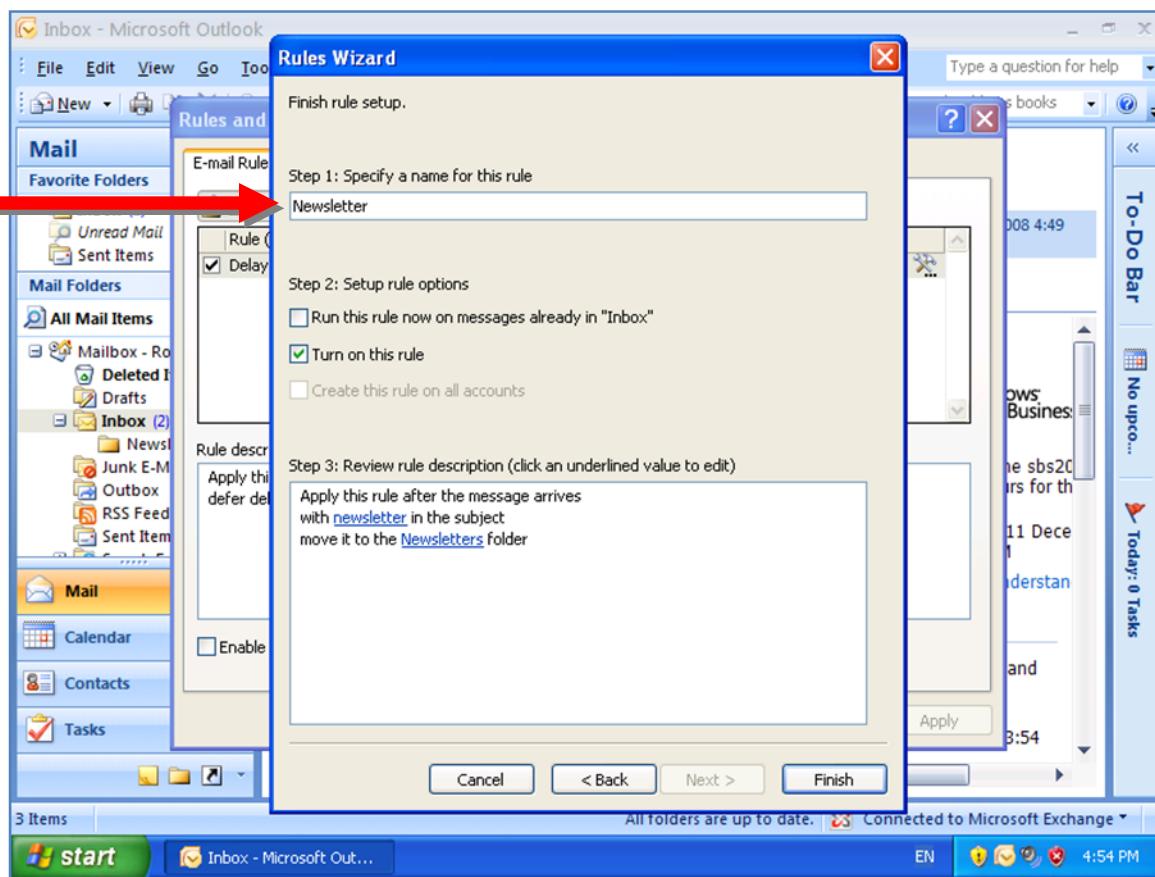
Press **Next** to continue.



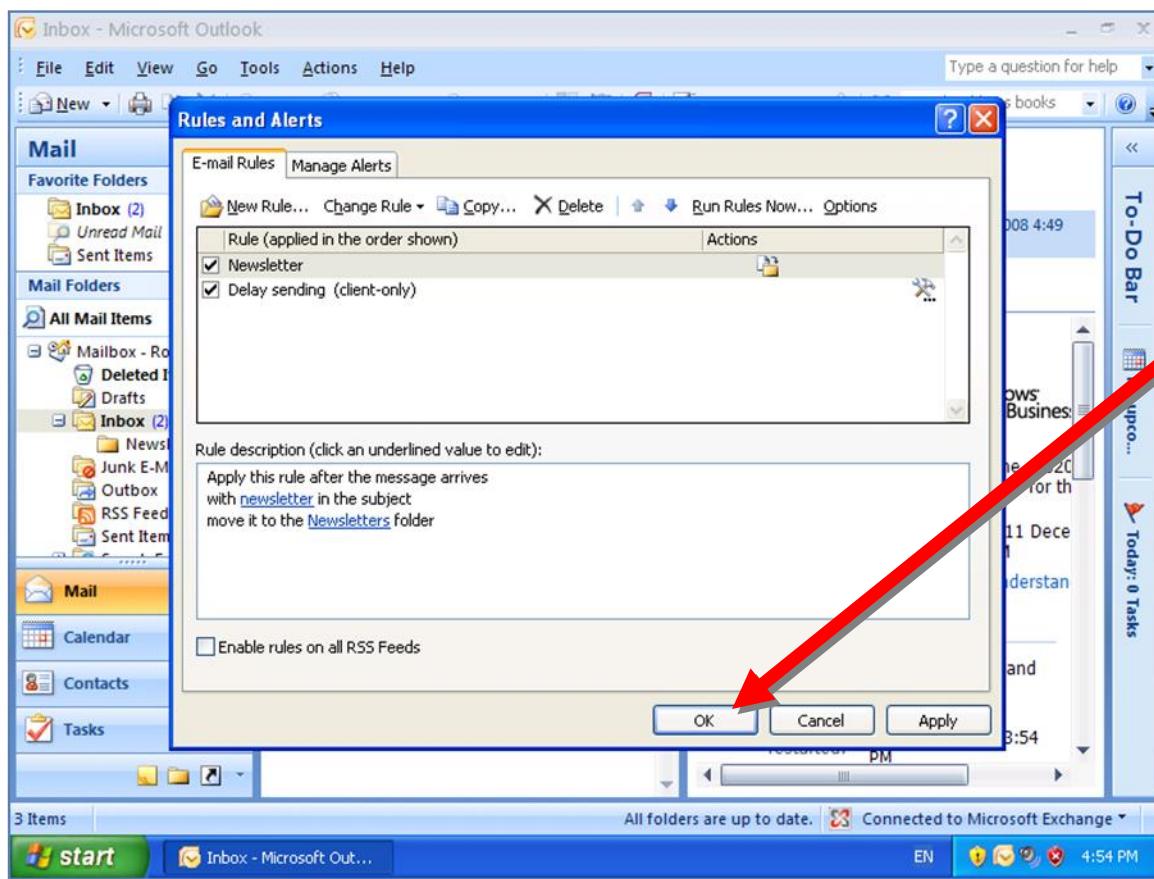
The next step allows you to define any exemptions to the rule you are creating.

To create an exemption simply select the matching criteria, add any additional information as has been shown with previous steps. However in this case we do not want any exemptions so we make no selections.

Press the **Next** button to continue.

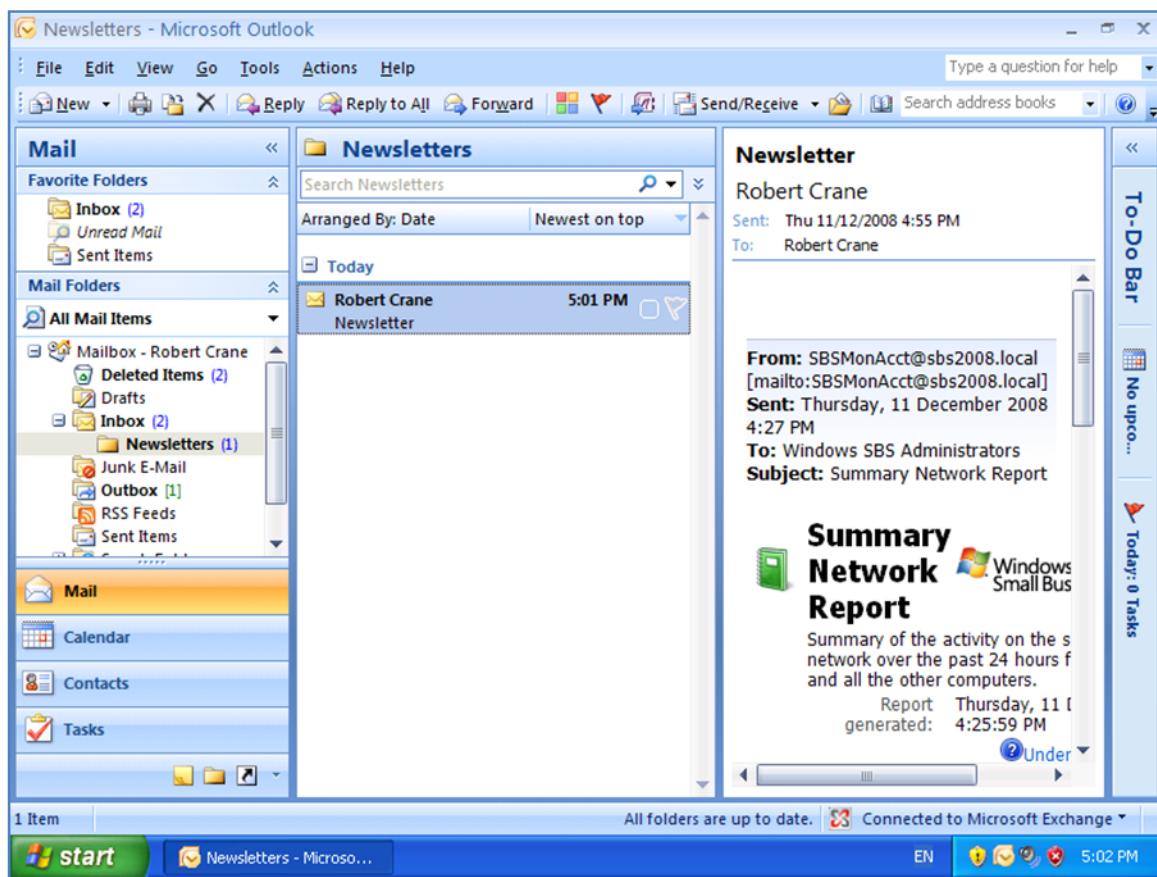


Give the new rule a descriptive name and press the **Finish** button to complete the rule creation process.



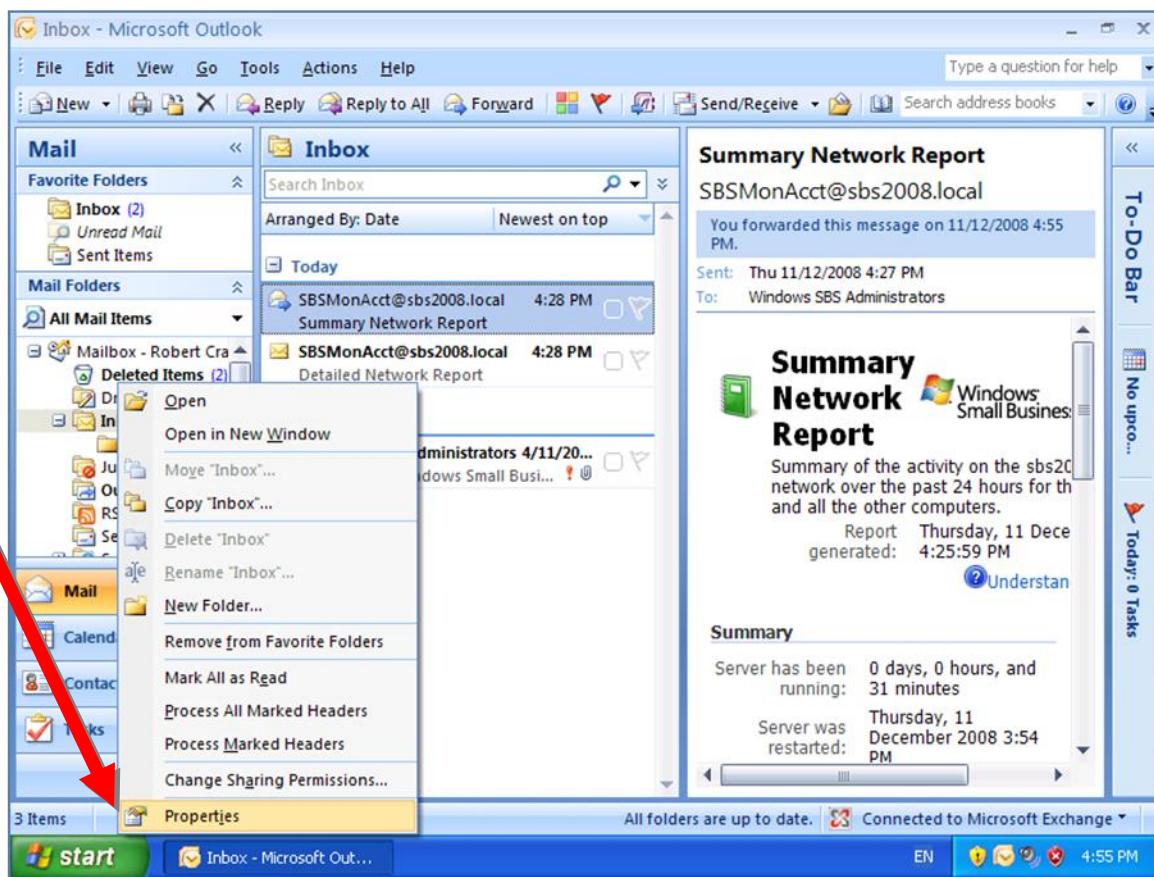
You will be returned to the *Rules and Alerts* window where the rule you just created should now appear.

Press the **OK** button to close this window.



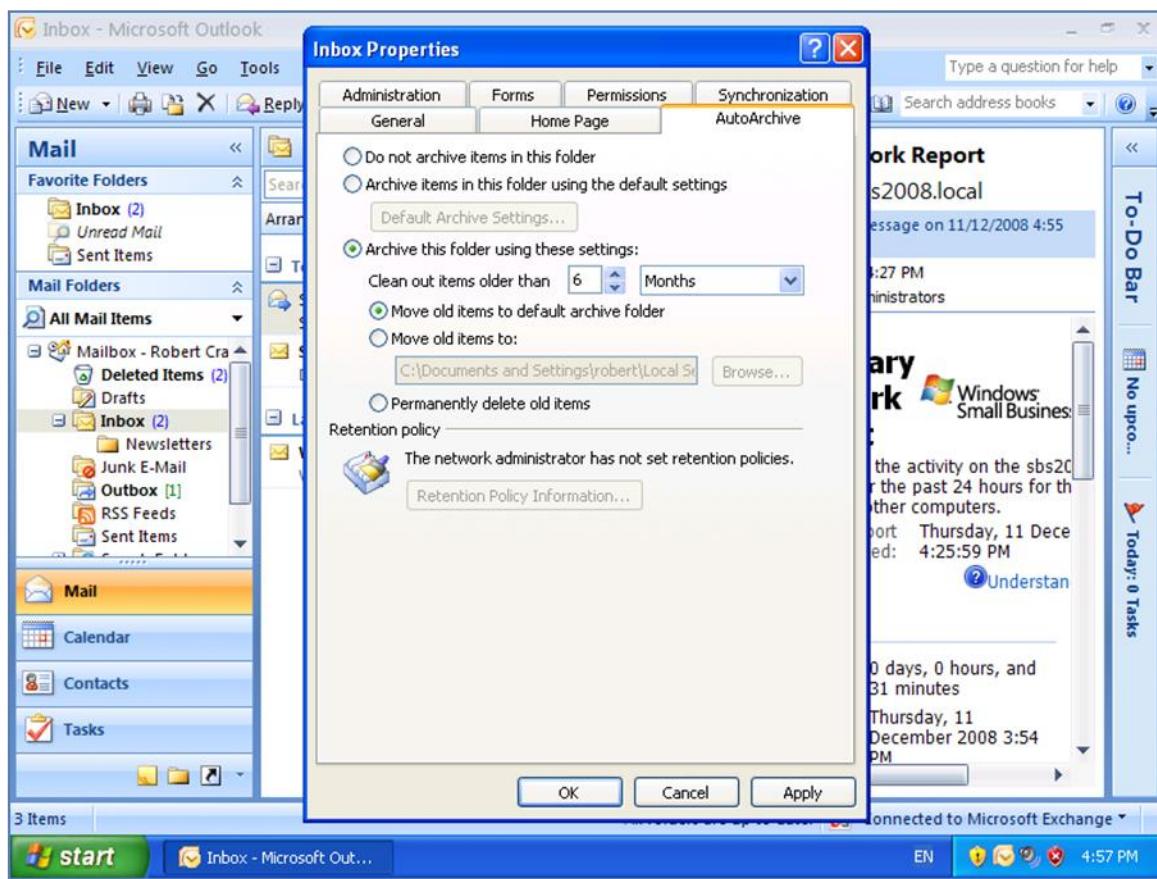
If an email now arrives in your inbox that now matches the rule you created the action you specified will take place.

In this case, any email arriving with a subject newsletter is automatically moved to the folder *Newsletters* for later review as shown above.



All emails that are sent, received and even deleted remain in your mailbox unless purged. Over time this may grow significantly warranting a cleanup.

Outlook has the ability to auto archive emails from folders to local storage files known as PST files. To determine the archiving settings for any folder simply **right mouse click** on the folder and select **Properties** from the menu that appears.

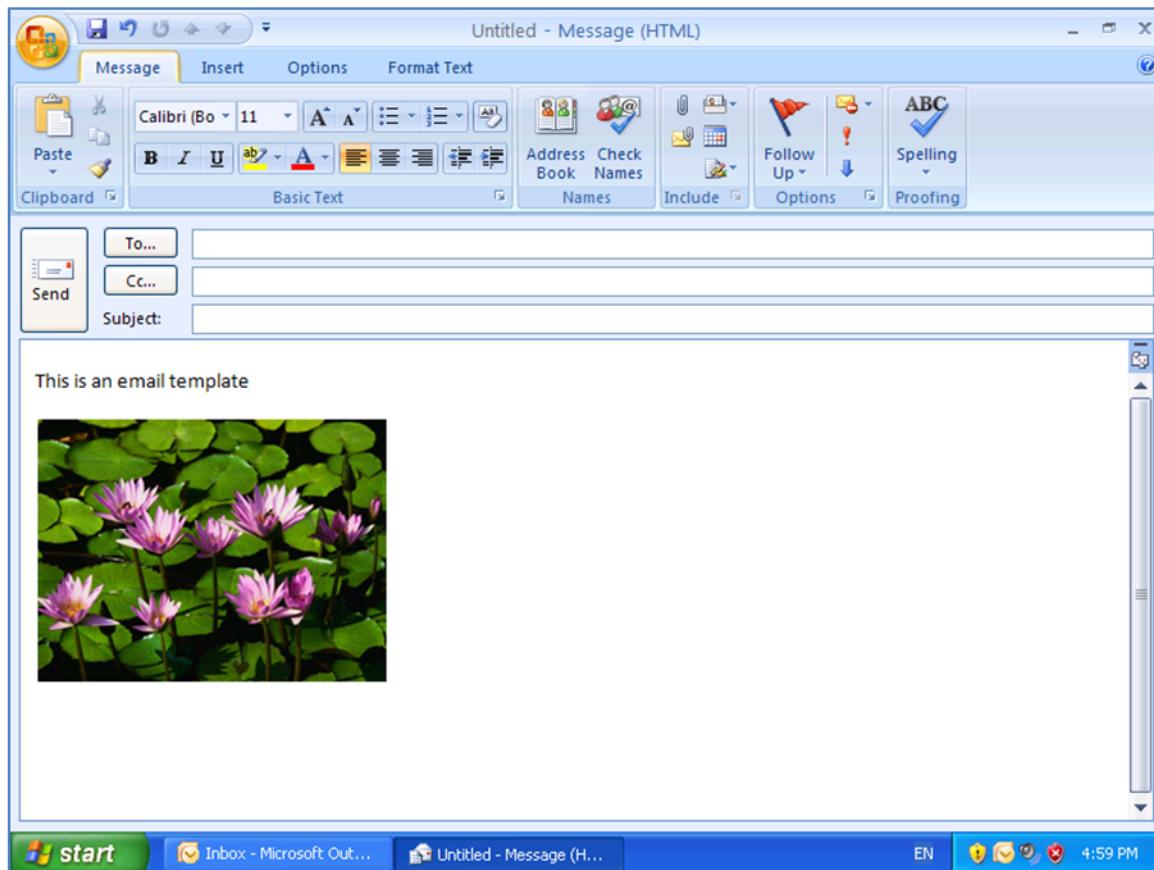


Under the **AutoArchive** tab you will find the archive settings. You may change any of these settings to suit.

Press the **OK** button when complete.

4. Email templates

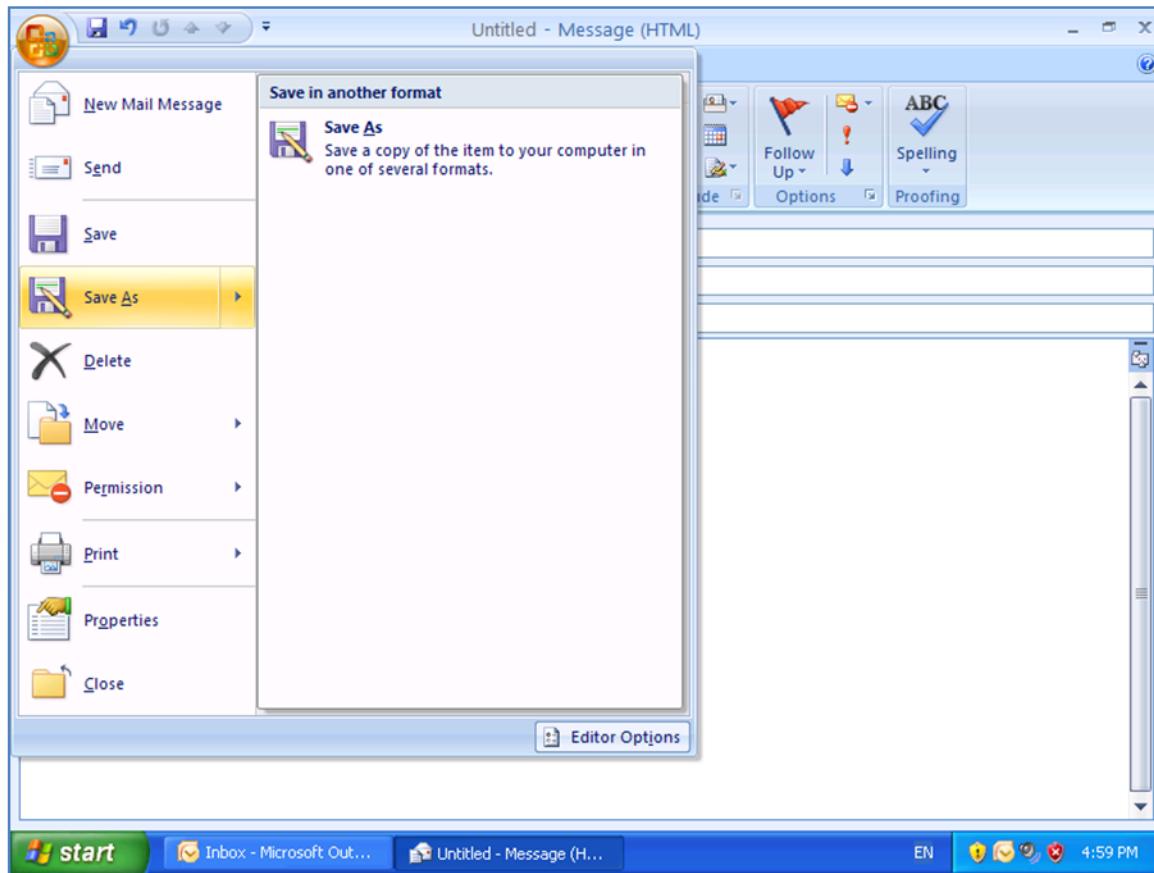
There are situations where you need to send out the same email a number of times. Rather than copying and pasting from other emails it makes more sense to take advantage of email templates. These allow you to create a standard email that you can recall at a later stage when you need to send similar information.



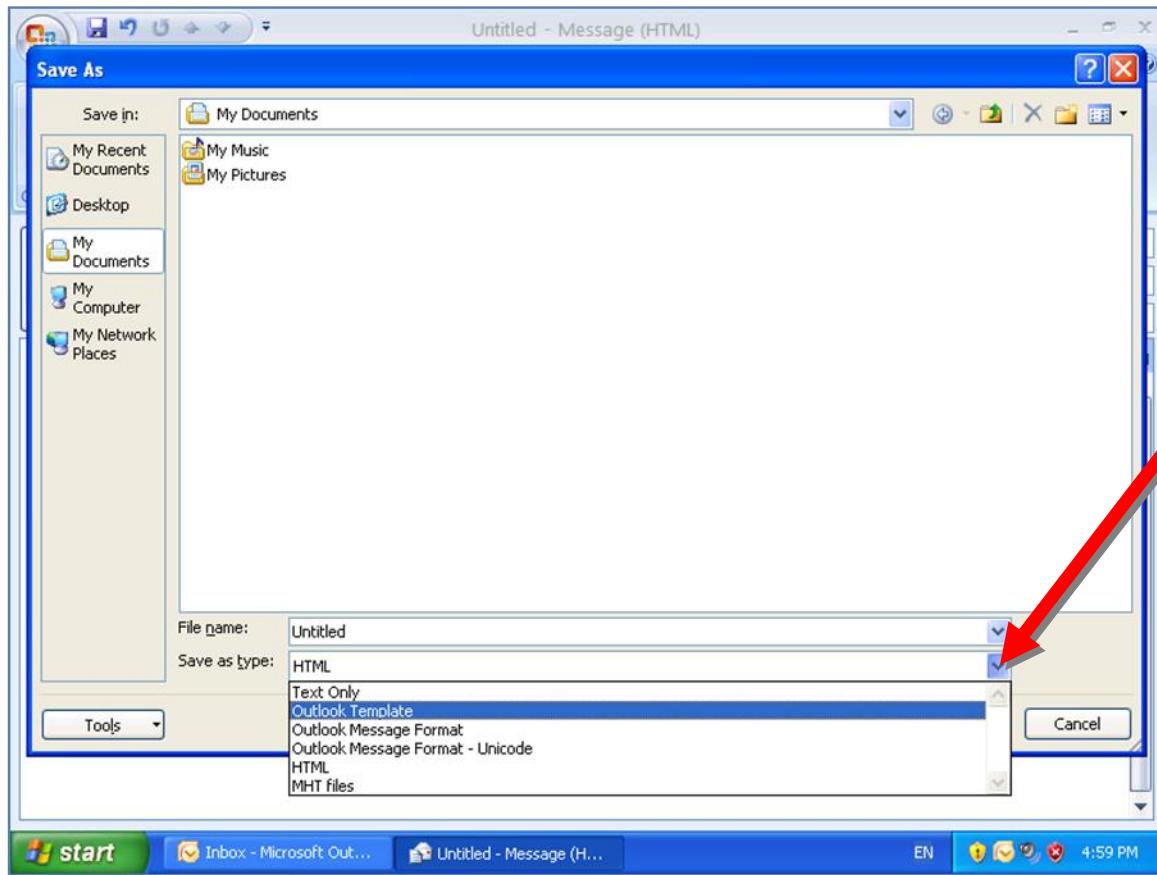
To create an email template simply create a normal email without any recipient in the address field.

Studies have shown that the average office worker does only 1.5 hours of actual work per day. The rest of the time is spent socializing, taking coffee breaks, eating, engaging in non-business communication, shuffling papers, and doing lots of other non-work tasks. The average full-time office worker doesn't even start doing real work until 11:00 am and begins to wind down around 3:30 pm.

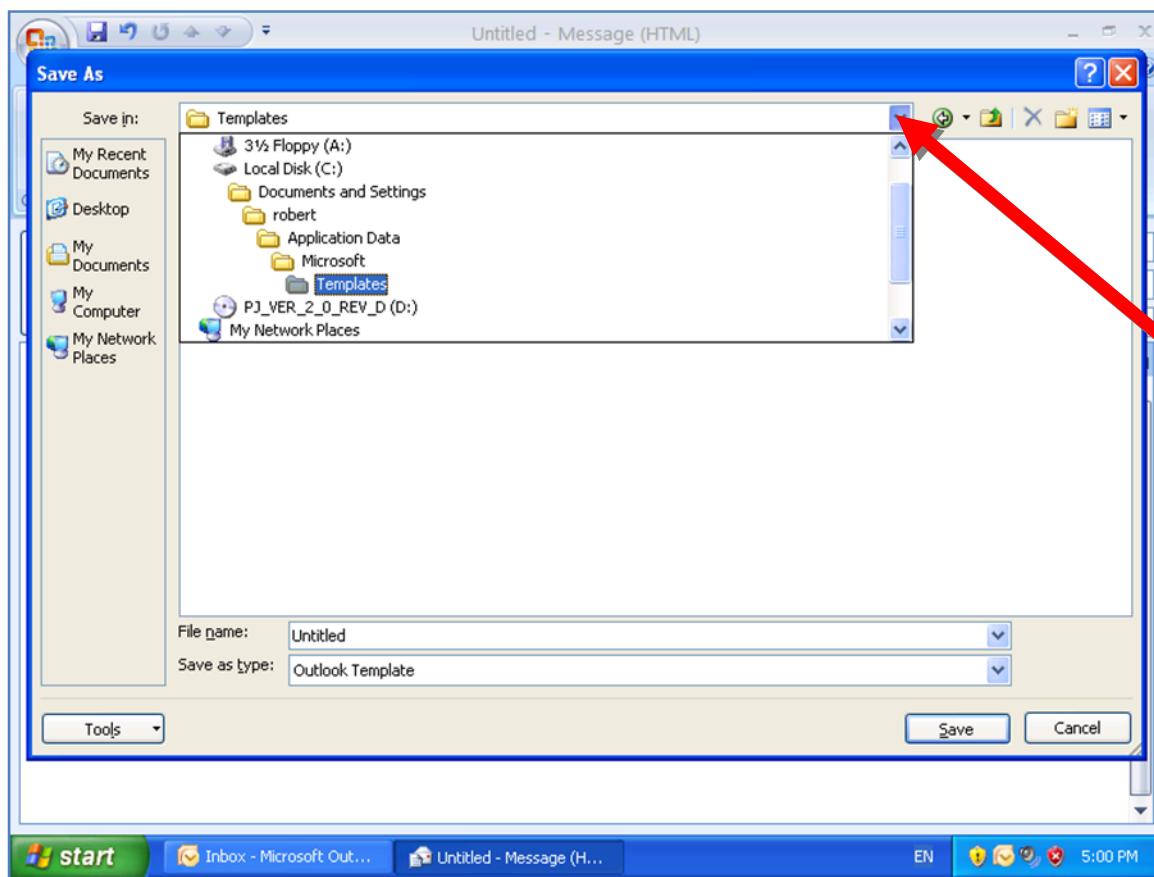
(<http://marktaw.com/blog/GettingBackToWork.html>)



When the email is complete press the *Office button* in the upper left of the screen and select **Save As** from the menu that appears.

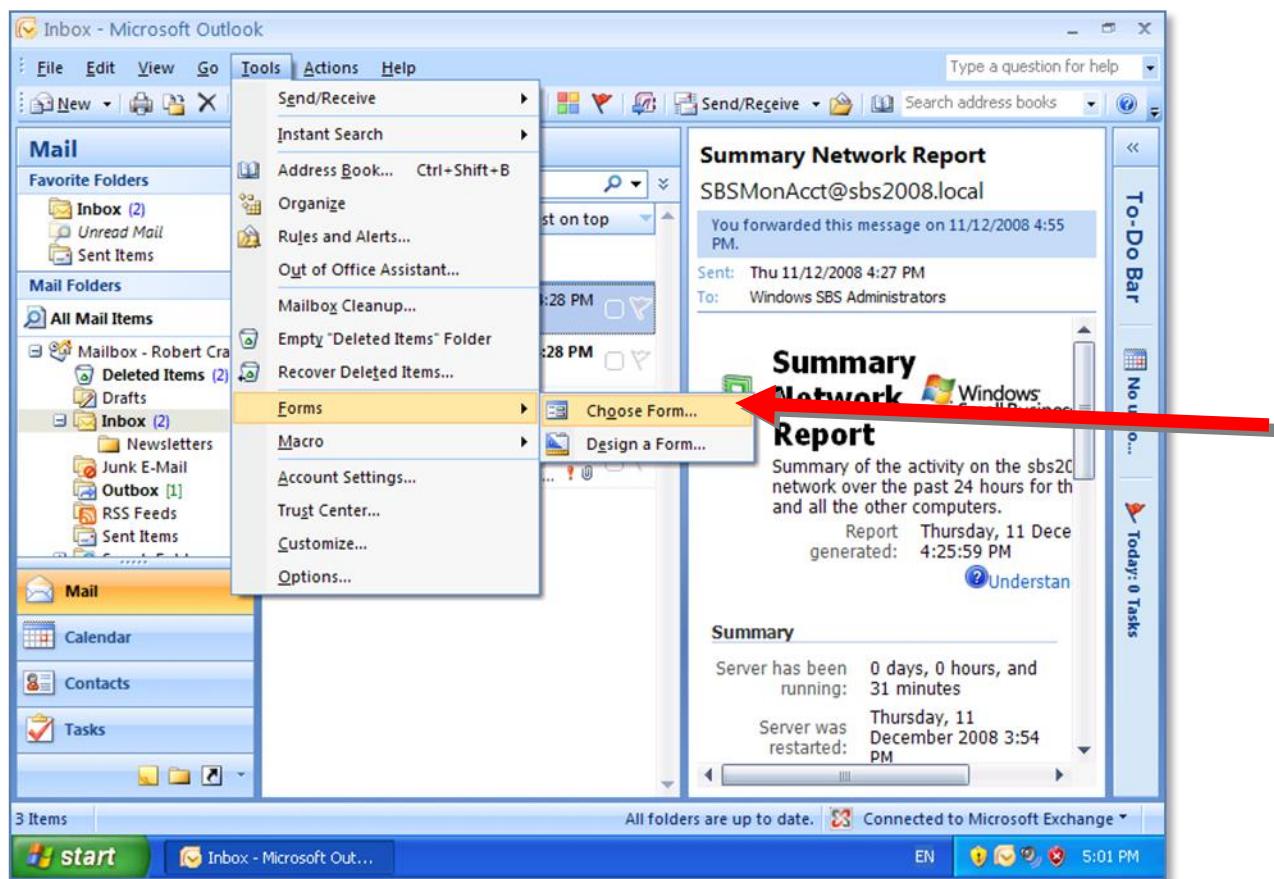


Pull down the *Save as type* field and select **Outlook Template** from the list.

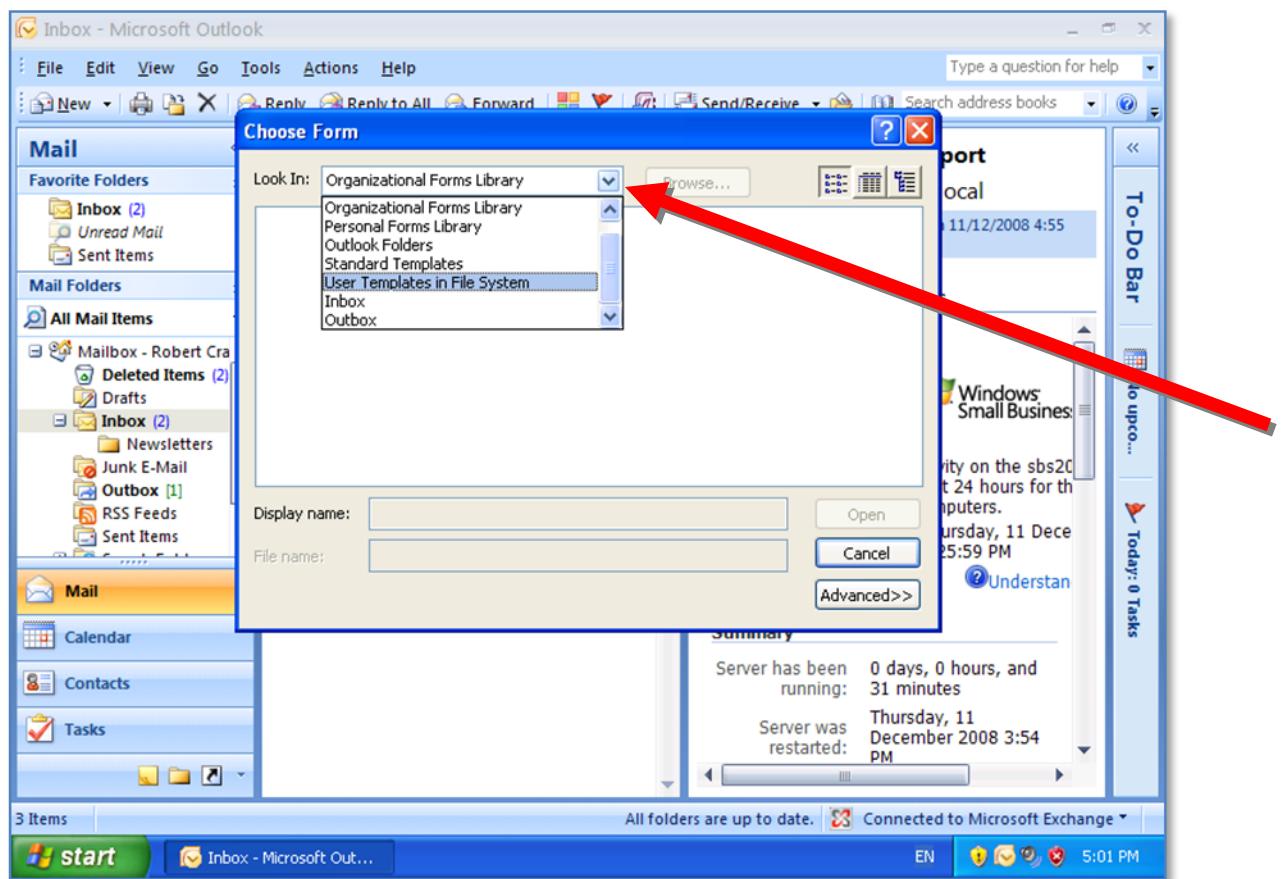


Locate the destination of the template on your file system. By default, Outlook email templates will be saved to *c:\documents and settings\<user_name>\application data\microsoft\templates*.

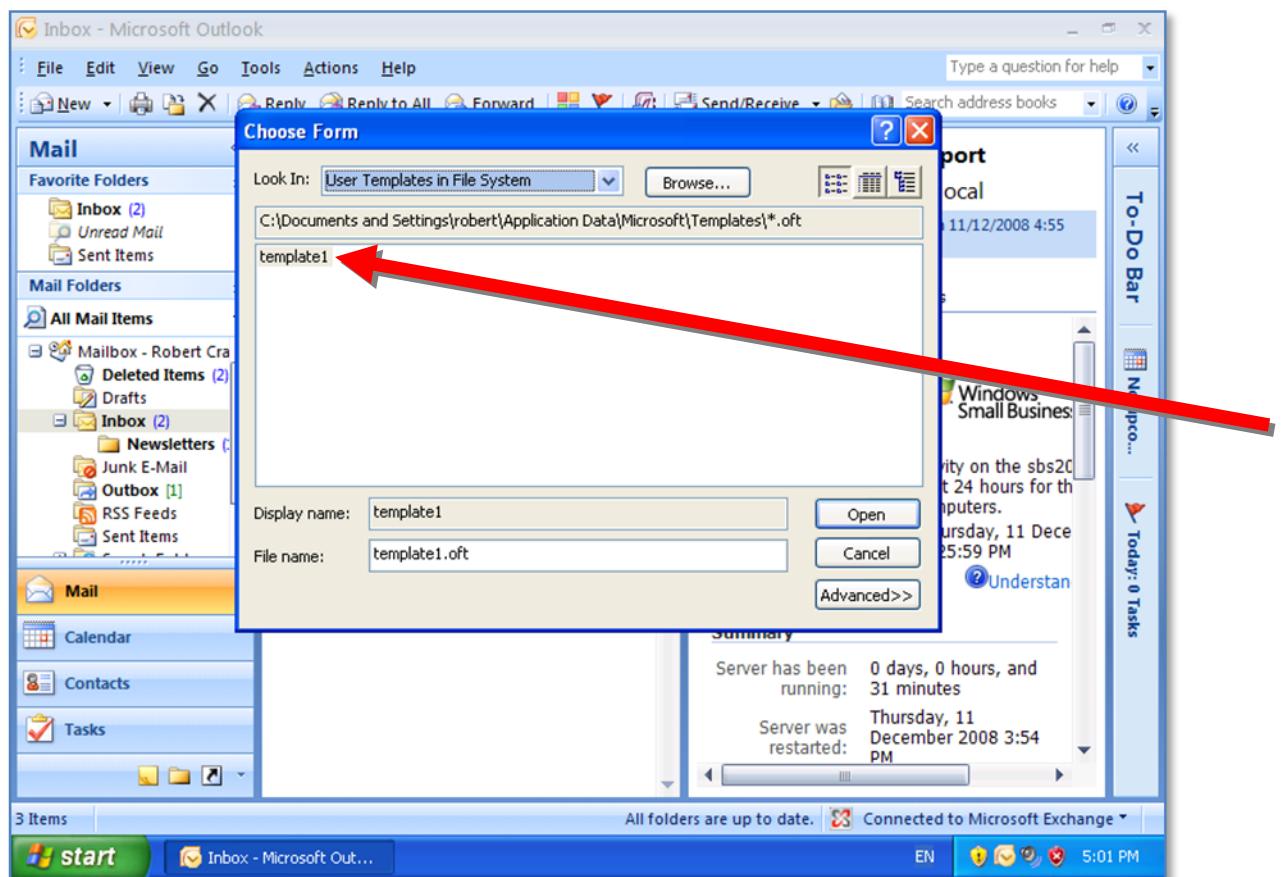
Give the template a name and press the **Save** button.



To create an email based on a template you have already created complete the following. With Outlook open select **Tools**, then **Forms**, then **Choose Form**.

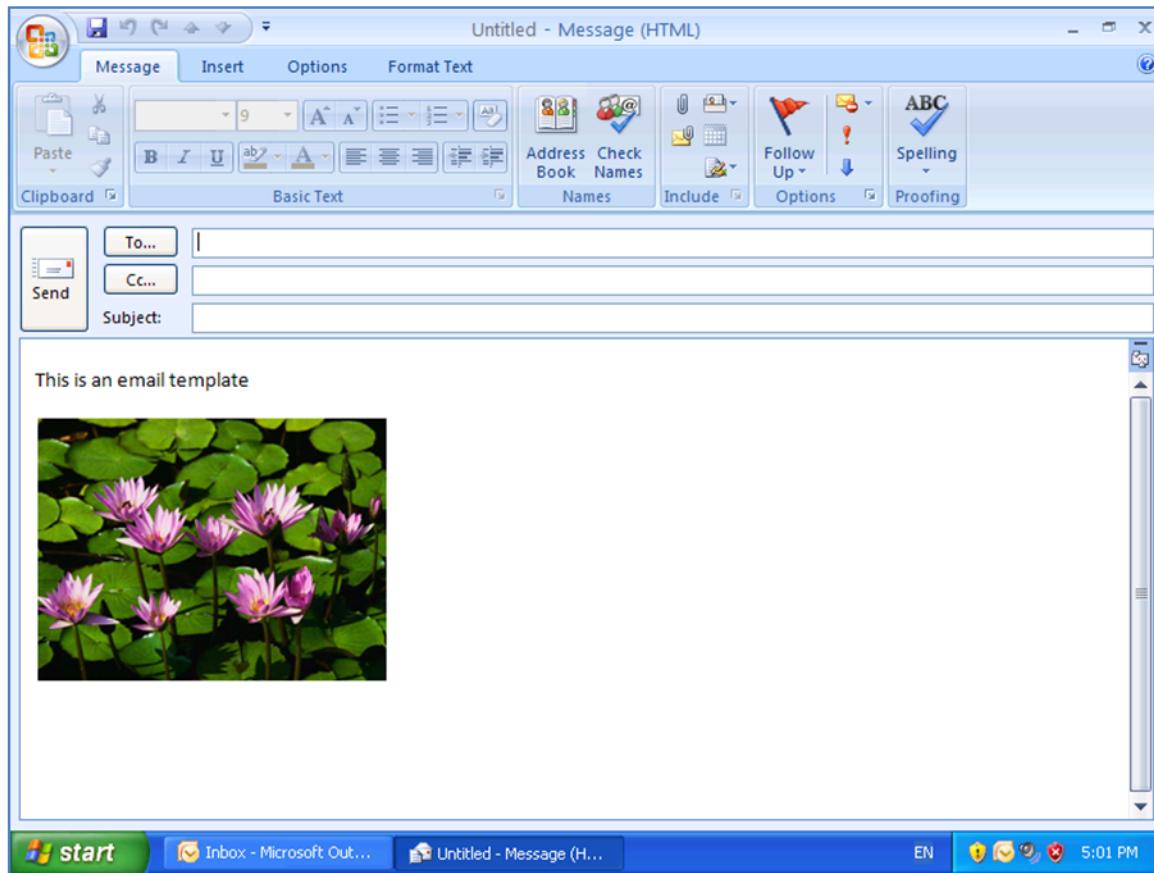


In the *Look In* field at the top of the *Choose Form* window select the option **User Templates in File System**.



You should now see a list of email templates you created earlier. If you saved your email templates to another location you can use the **Browse** button to the right of the *Look In:* field.

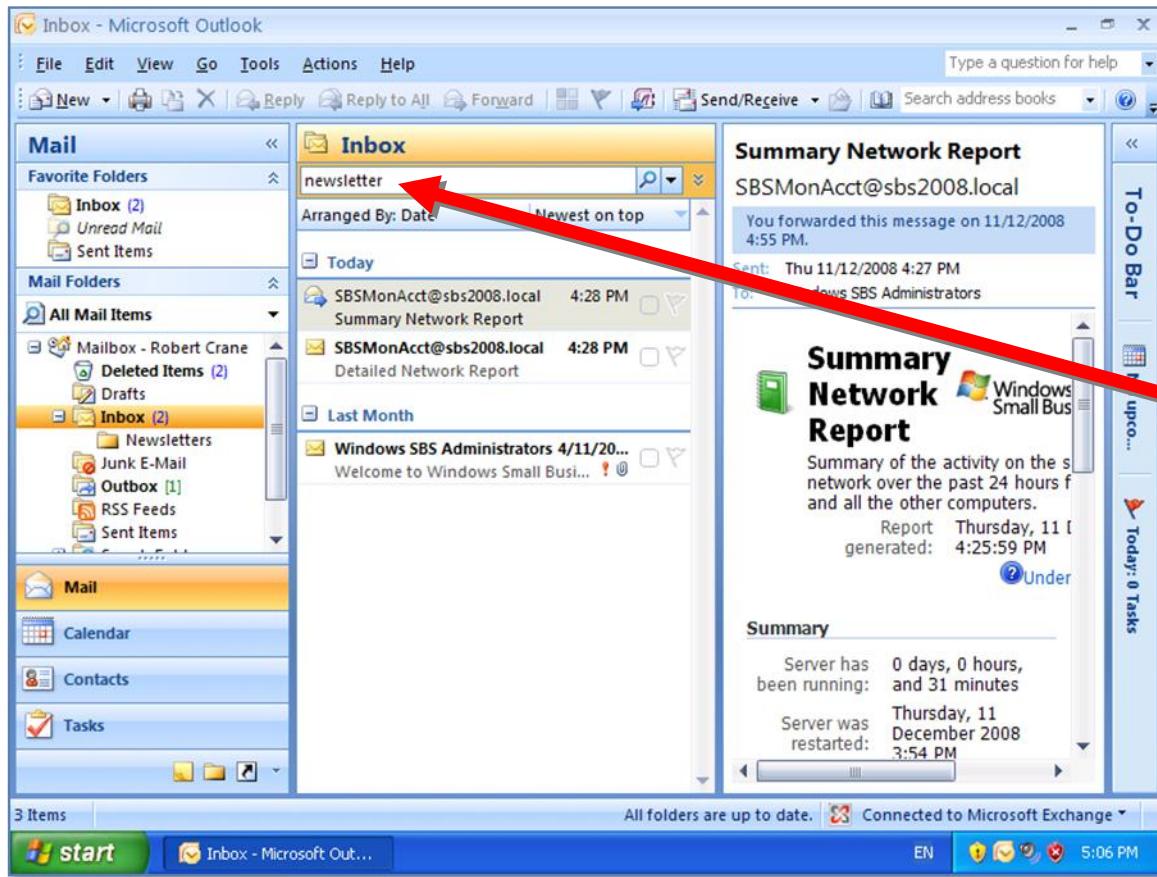
Select the template you wish to use and press the **Open** button.



The email template will now appear. Simply complete any additional required information, insert a recipient and press the **Send** button.

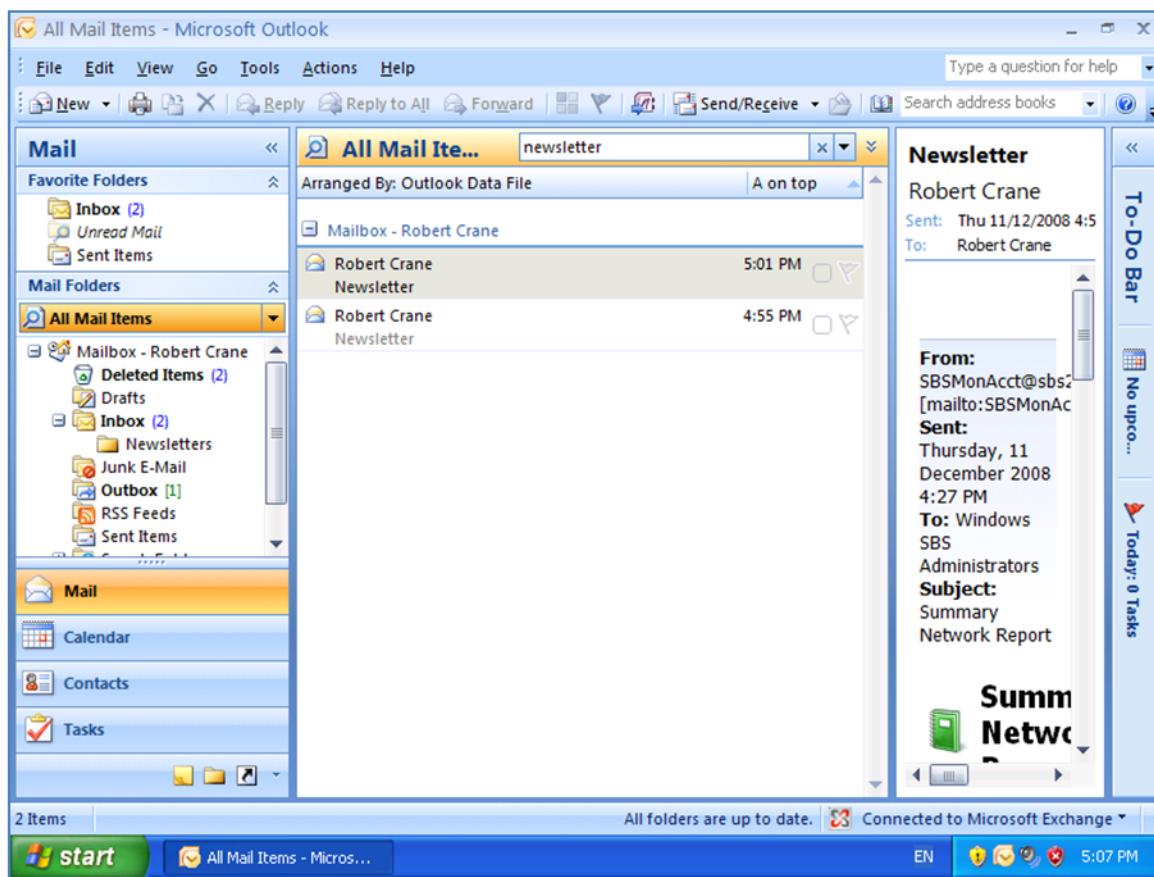
5. Locating information

The ability to find information in mailboxes is critical. Given the growing volume of information inside mailboxes being able to find information quickly is also extremely critical.



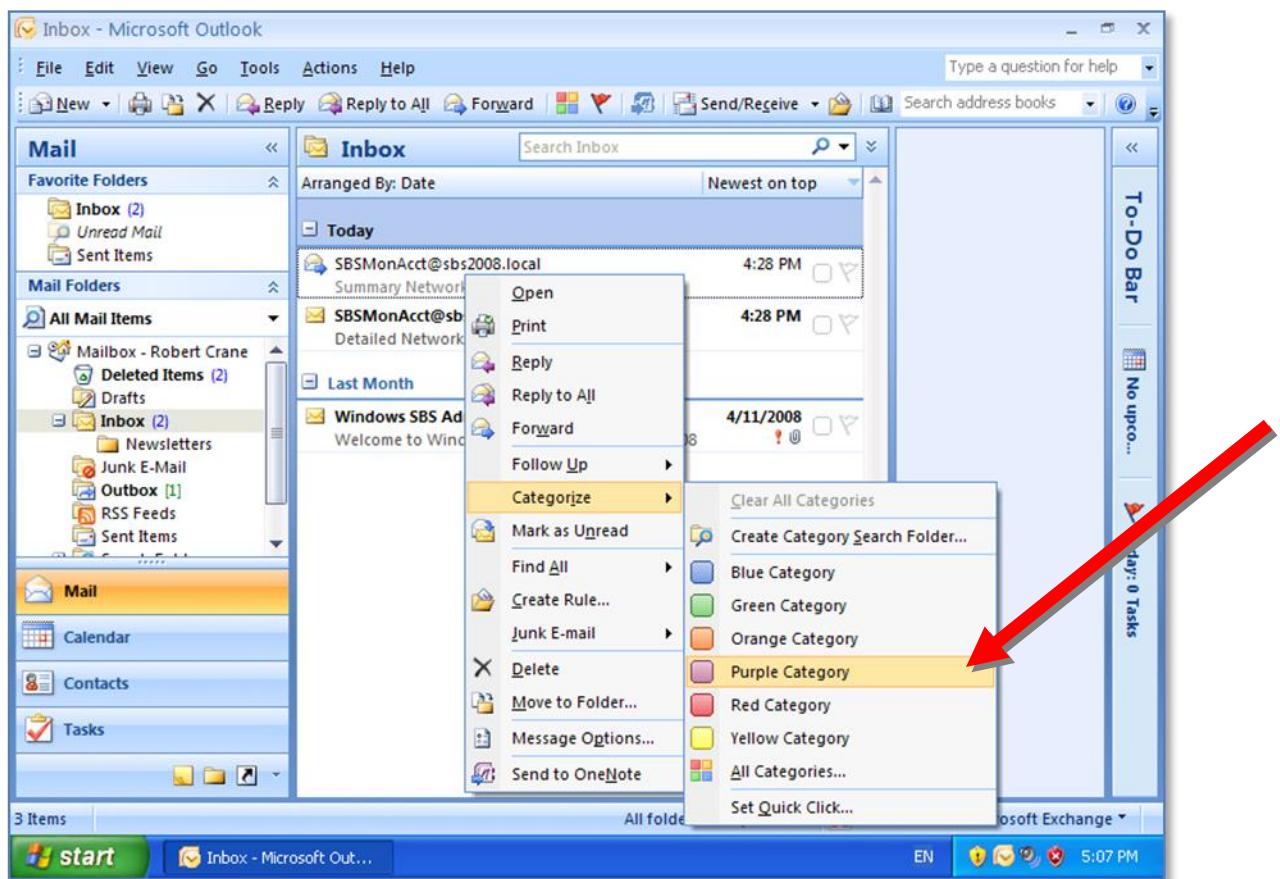
At the top of each folder, when you select it, you'll find a *search box*. To search that folder for a term simply type the term into the line and **click on the magnifying glass to the right**.

Office workers in the U.S. spend at least 25 percent of the day on email and countless hours on their handhelds. In 2009, the Bush administration is expected to turn over more than 100 million electronic messages to the National Archives. (The Clinton administration, by contrast, left behind 32 million emails in 2001.) All the data shows that email usage is continuing to grow.
(<http://www.npr.org/templates/story/story.php?storyId=9495170>)



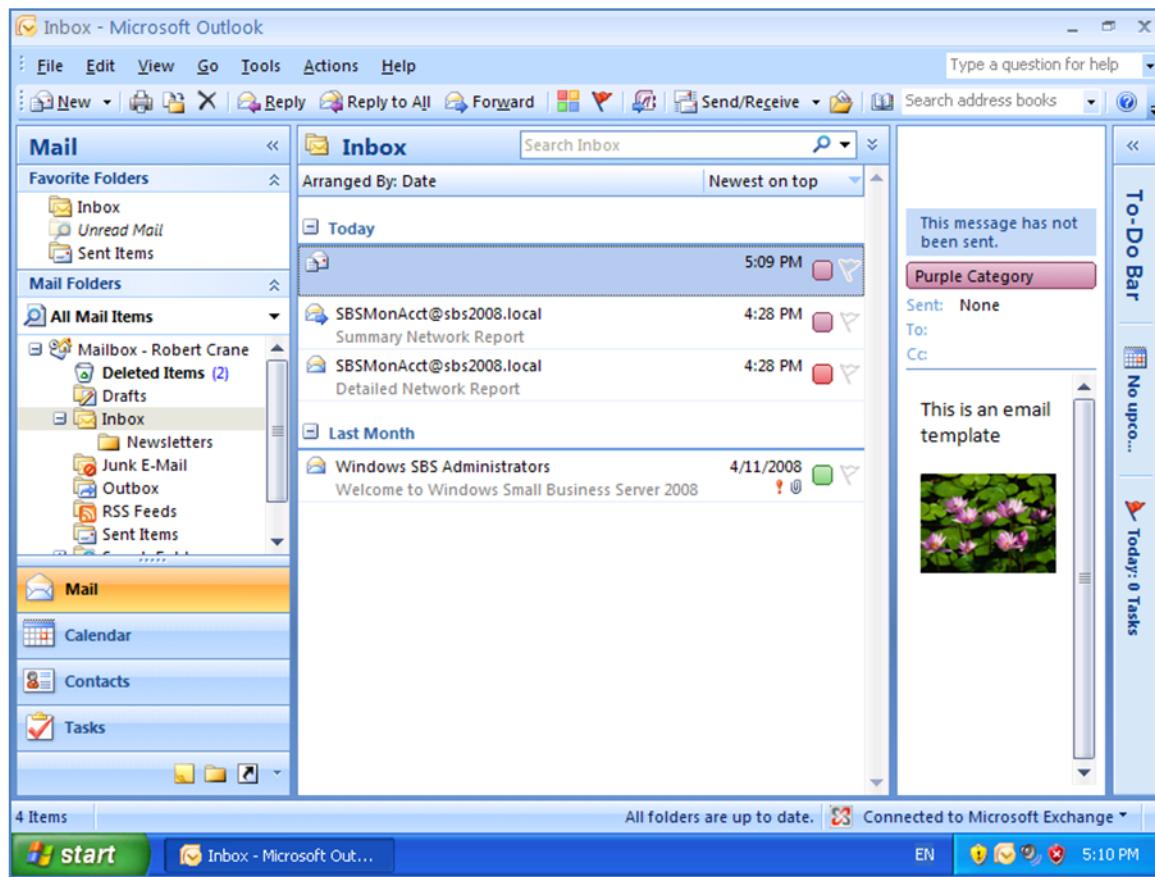
In this case the search term *newsletter* was used and the resulting two matches have been displayed.

You can search on an exact phrase by including the phrase in quotations. For example, to search for the phrase payments made type “*payments made*” including the quotes into the search box.

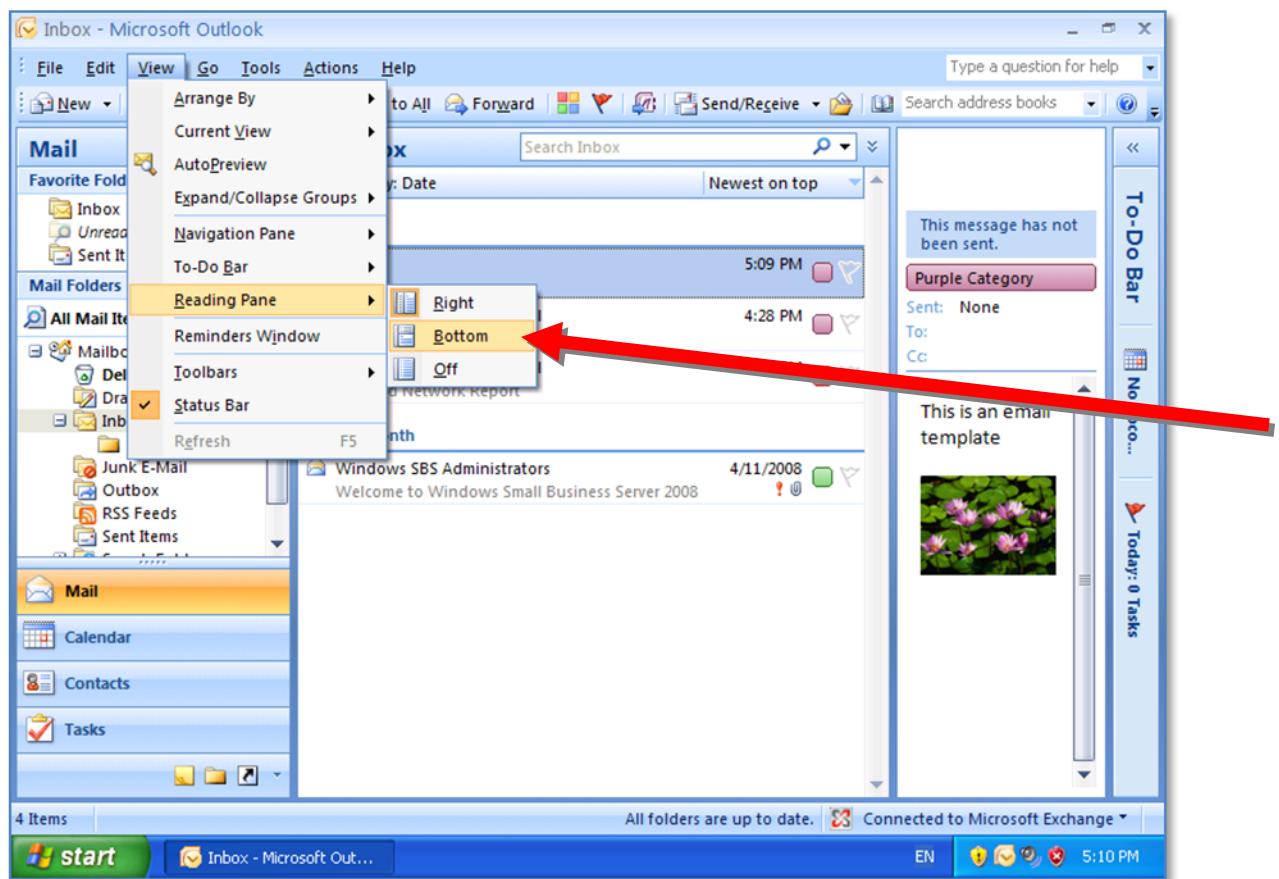


You can also assign a category to each email. To do this simply **right mouse click** on the email, select **Categorize**, then the desire *category* from the list that appears.

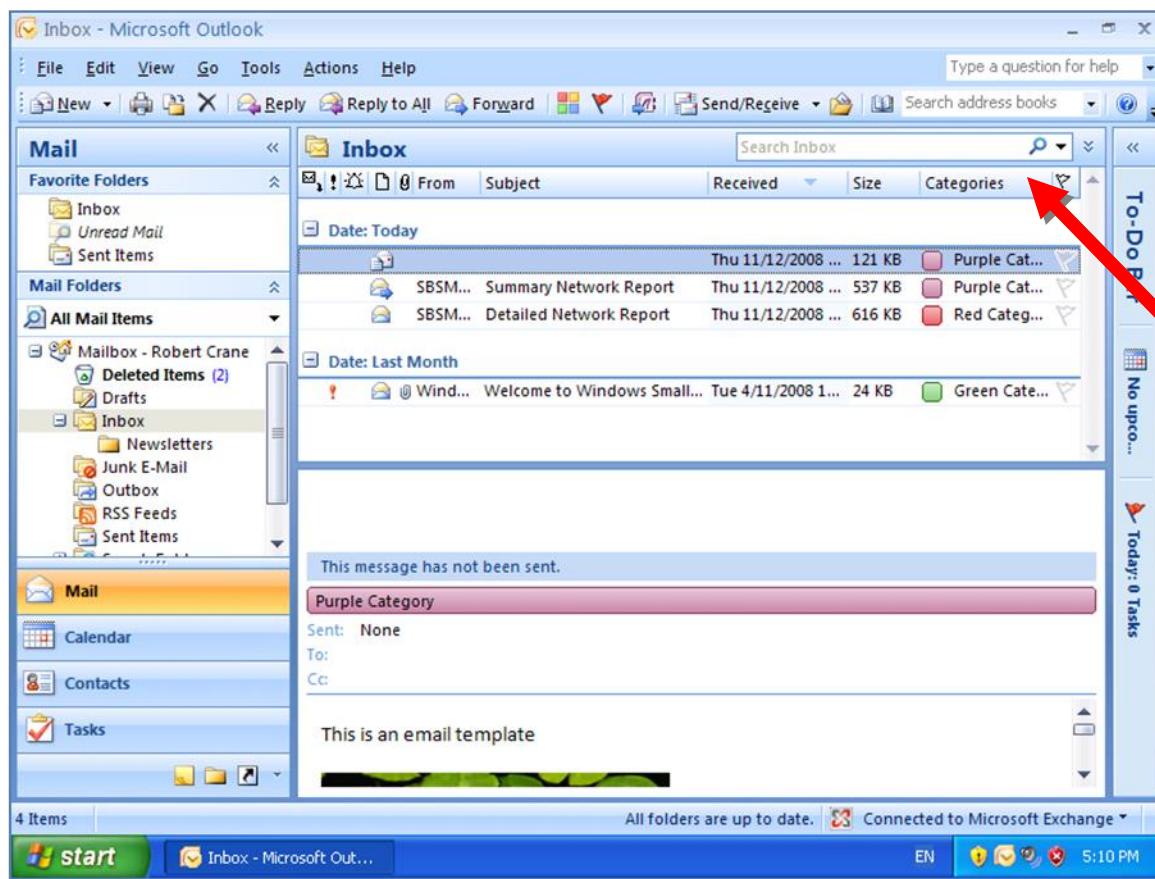
You can better define your categories by selecting the **All Categories** from the menu that appears.



With categories assigned it is much quicker to locate the information that you are after.

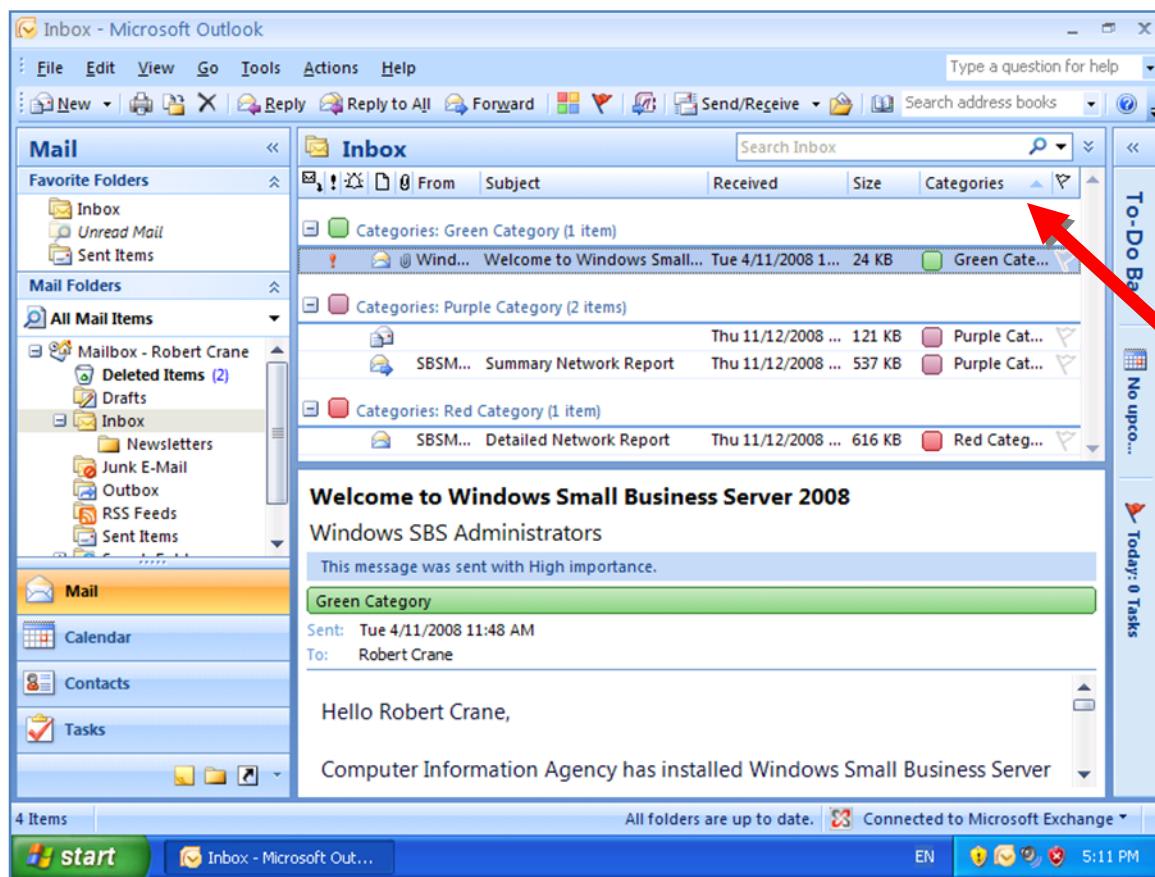


You can also sort by categories. You may not be able to see the categories field in your current view. To allow this simply move the reading pane to the bottom of the screen by selecting **View**, then **Reading Pane**, then **Bottom**.

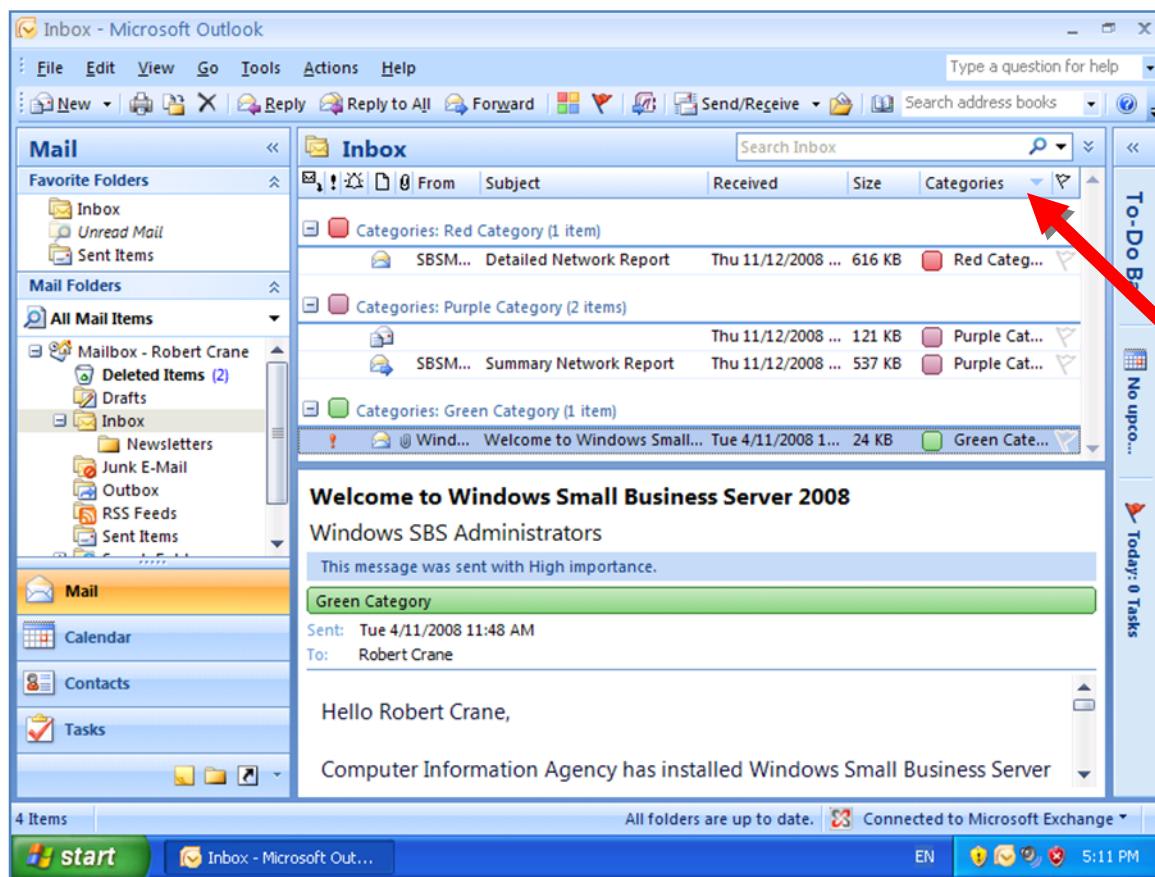


With the reading pane at the bottom of the screen you can now see more column headings for your emails. One of these column headings is *Categories*.

To sort by Category simply **click** that column heading.



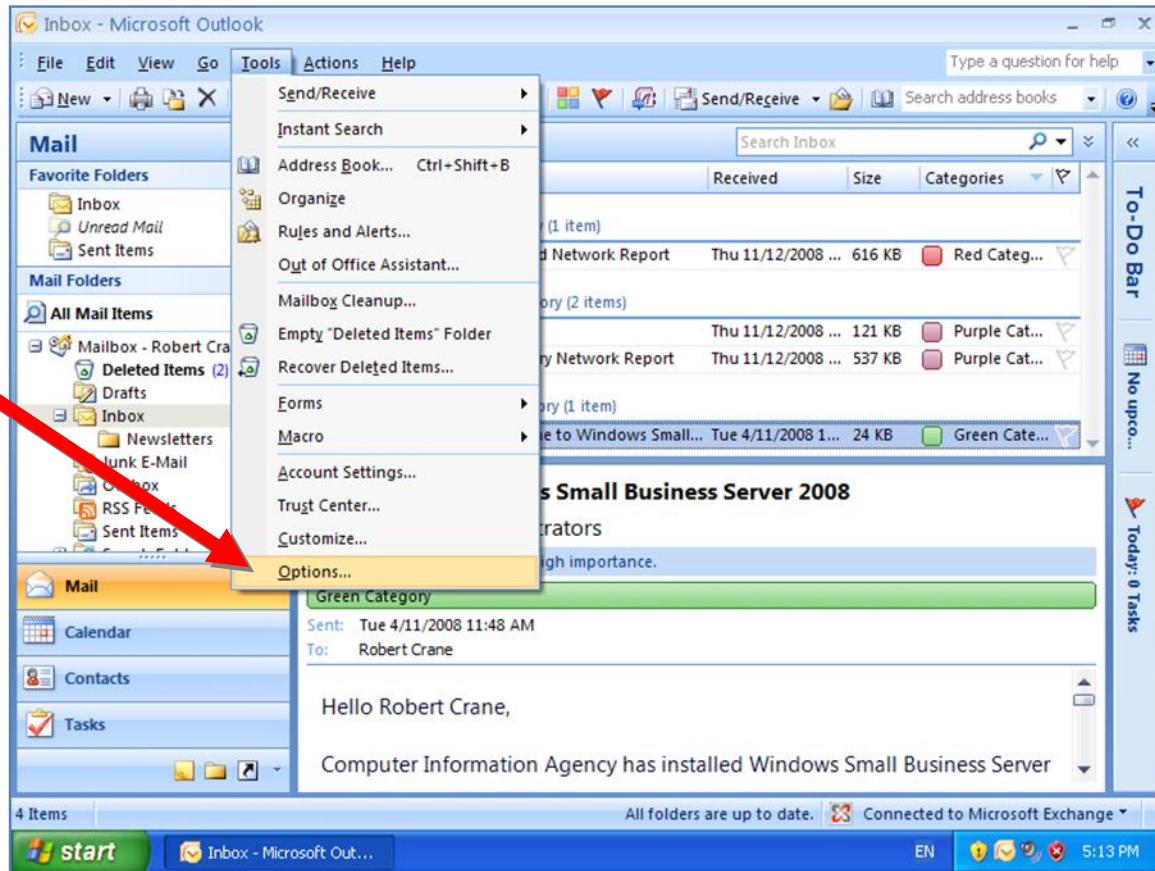
When you click on the *Categories* heading you will see a small arrow appear in the column heading indicating that this is the current sort field. You will also see all emails now sorted by category.



If you click the *Categories* field heading again you will find emails sorted by *Categories* again but in the reverse order.

6. Adjust send/receive checking

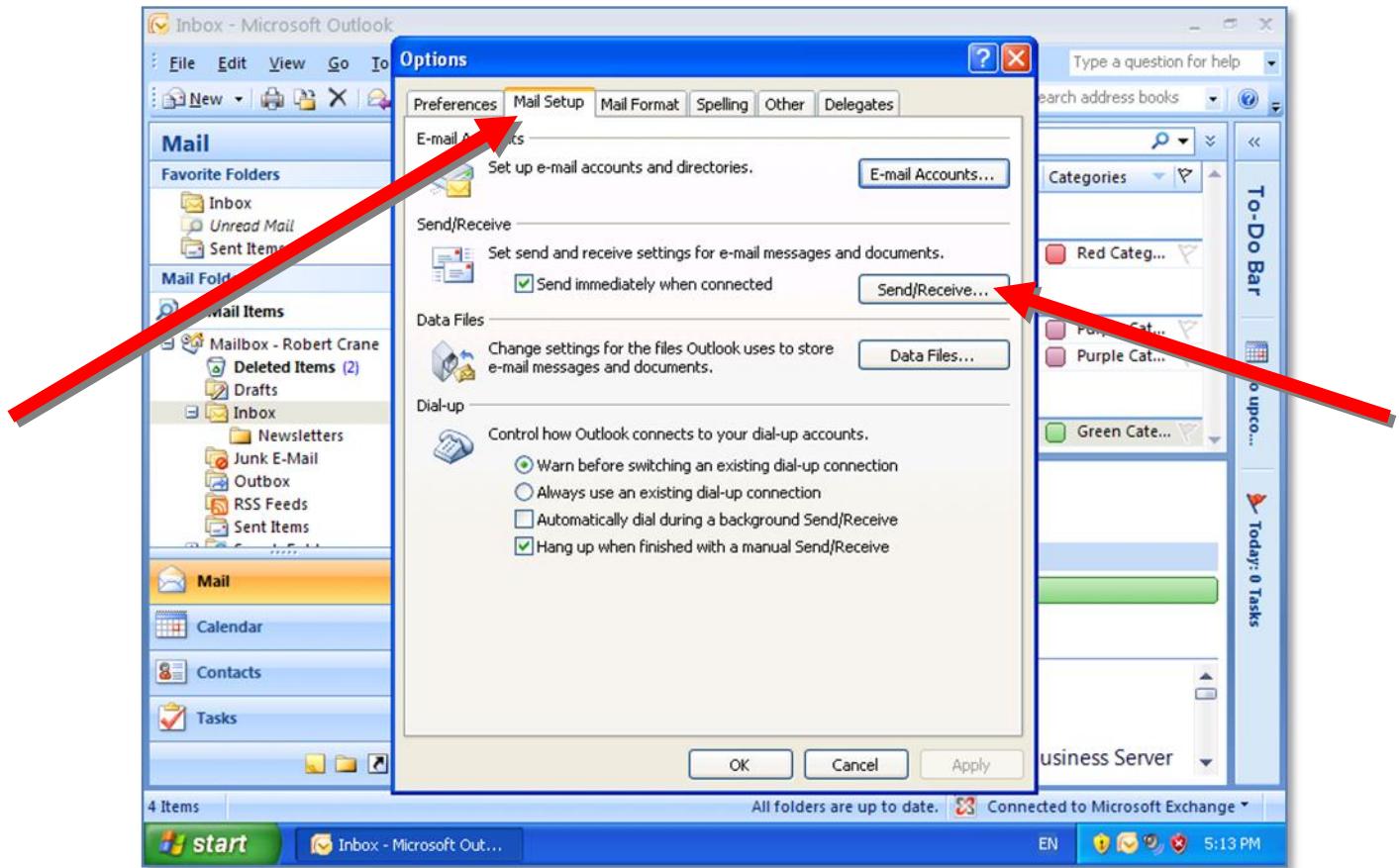
In most cases there is little need to check emails every five minutes. In fact studies show that such delivery times can dramatically affect productivity. Adjusting the delivery time from the default should provide more control over your time and prevent unnecessary distractions.



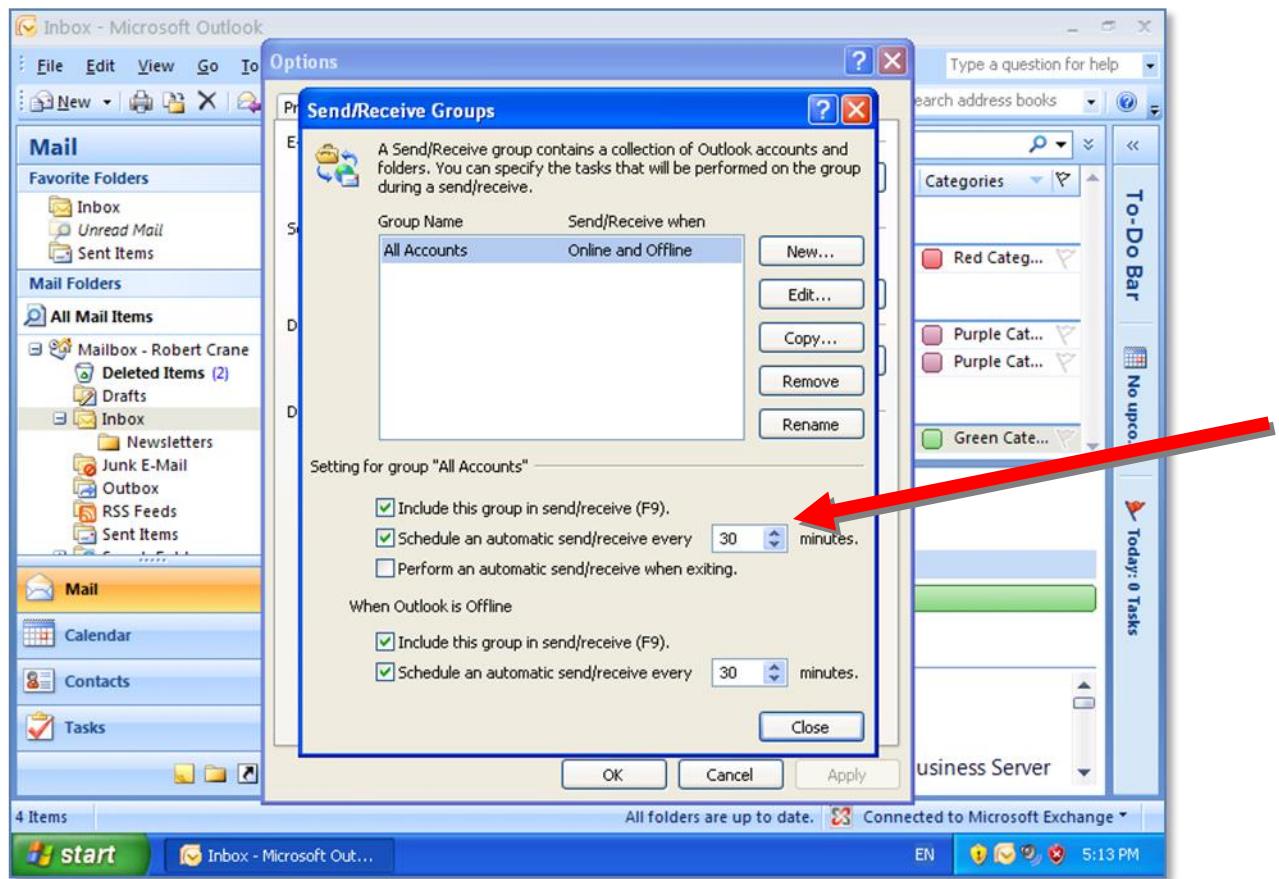
With Outlook open, select **Tools**, then **Options**.

Too many people, according to Rosenberg, still believe emails are inconsequential because they're not permanent. Deleted emails, however, can be recovered. "The typical sender of email would be surprised at how many copies are replicated at various steps in its transmission, and we all know that we have no control over the dissemination and replication of our writing once it is on its way to a recipient," writes Rosenberg.

(<http://itmanagement.earthweb.com/career/article.php/3592046>)



Select the **Mail Setup** Tab, then **Send/Receive** button.

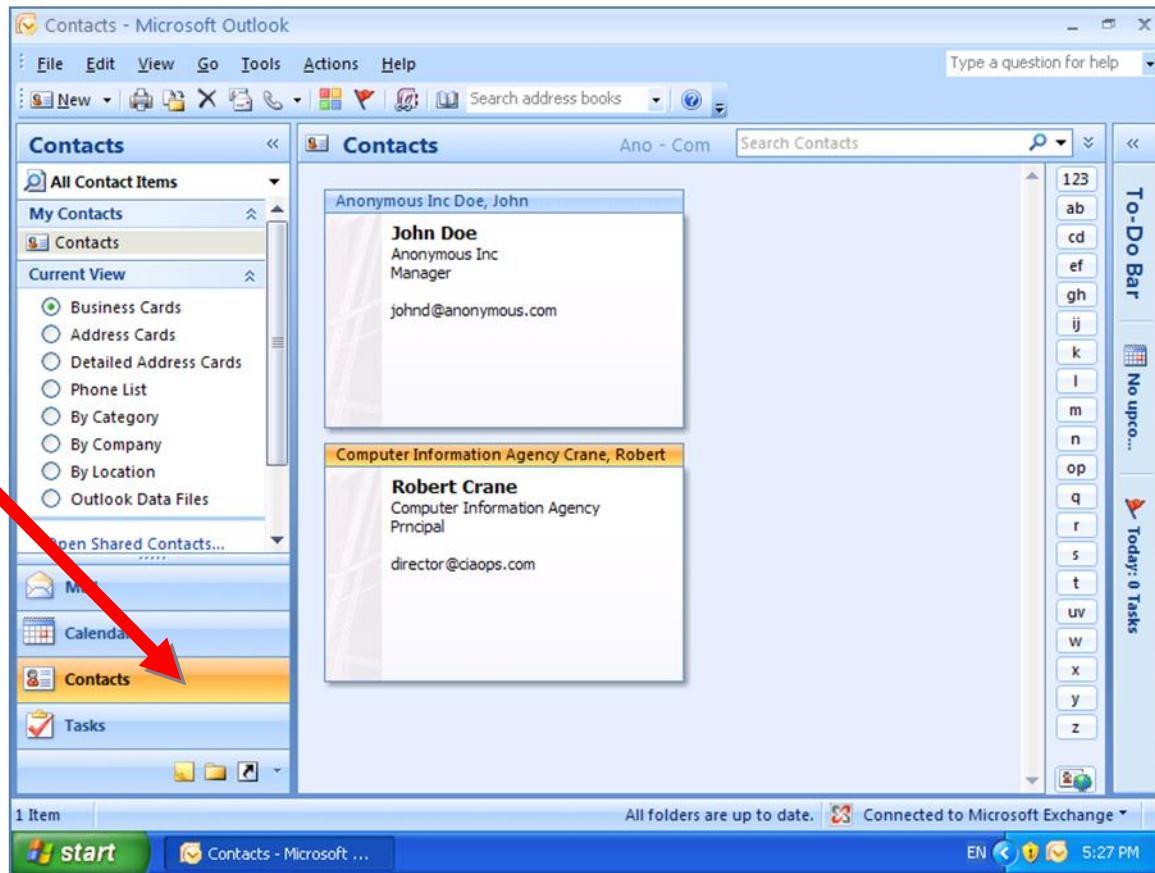


In the lower part of the window adjust the schedule of automatic send/receive to the desired time (in minutes). It is recommended that this figure be set to at least 30 minutes.

Press the **Close** button.

7. Outlook mail merge

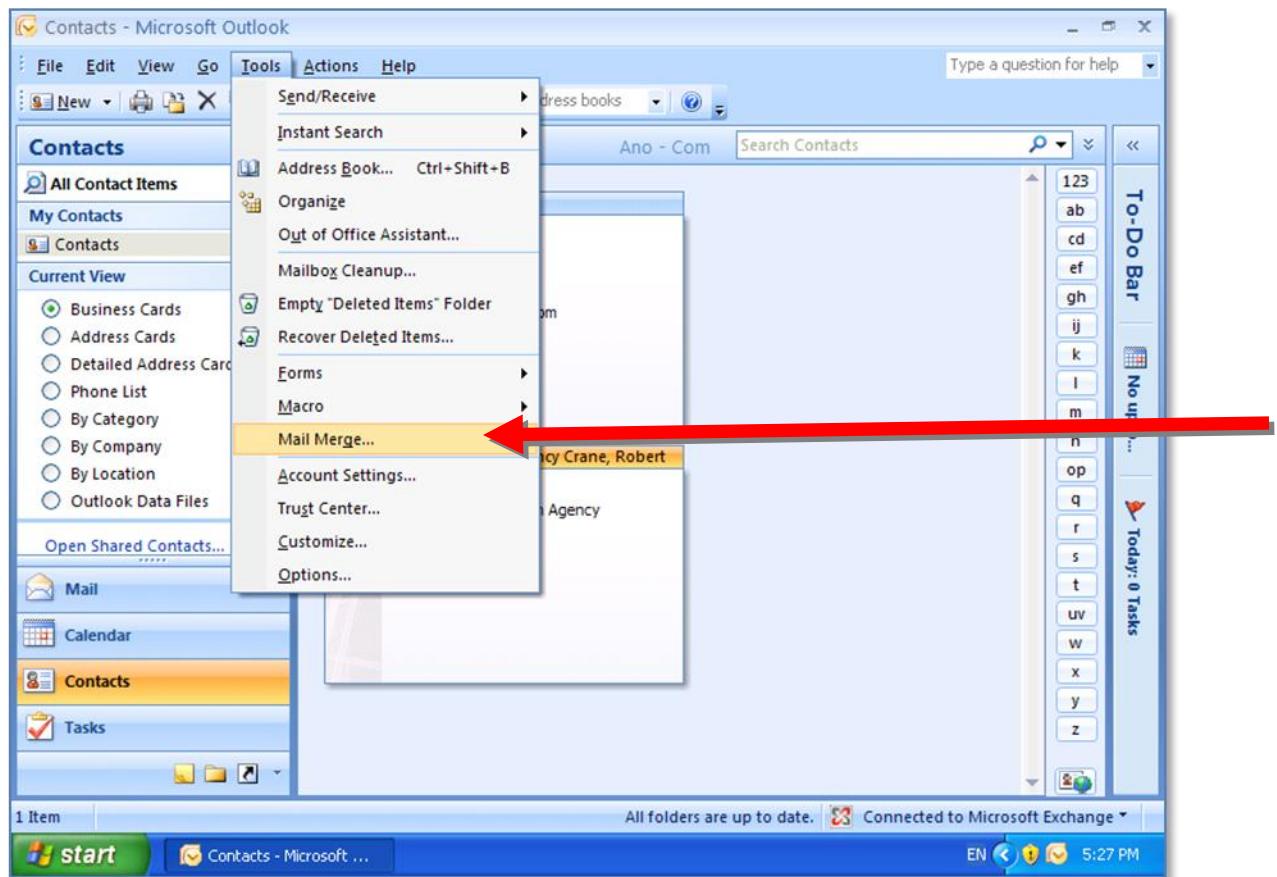
It is possible to send an email to a list of contacts in your address book using a mail merge. Much like the function available in word processors, a mail merge can save you time if you need to send the same email to a group of contacts.



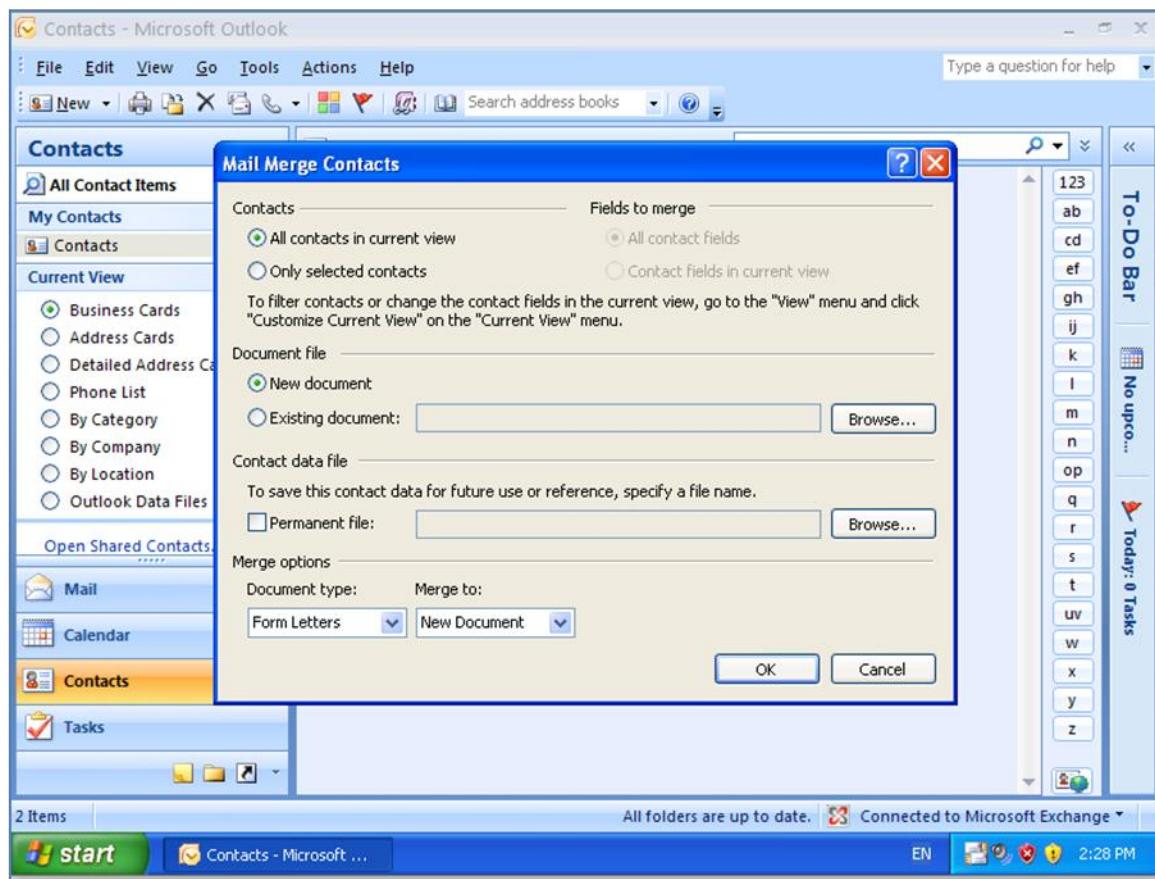
To accomplish this you will need to have contact details in your contact list as well as Microsoft Word and Outlook installed on your computer.

First off, personal usage of company email fosters a carelessness with business correspondence, says Rosenberg. Grammar, spelling and punctuation tend to go out with window with familiarity. Secondly, jokes, cartoons and stream-of-consciousness type writing should not be put on a company's electronic letterhead or with a business signature. And lastly, complaints about co-workers or gossip about colleagues or company matters simply do not belong on the corporate network.

(<http://itmanagement.earthweb.com/career/article.php/3592046>)

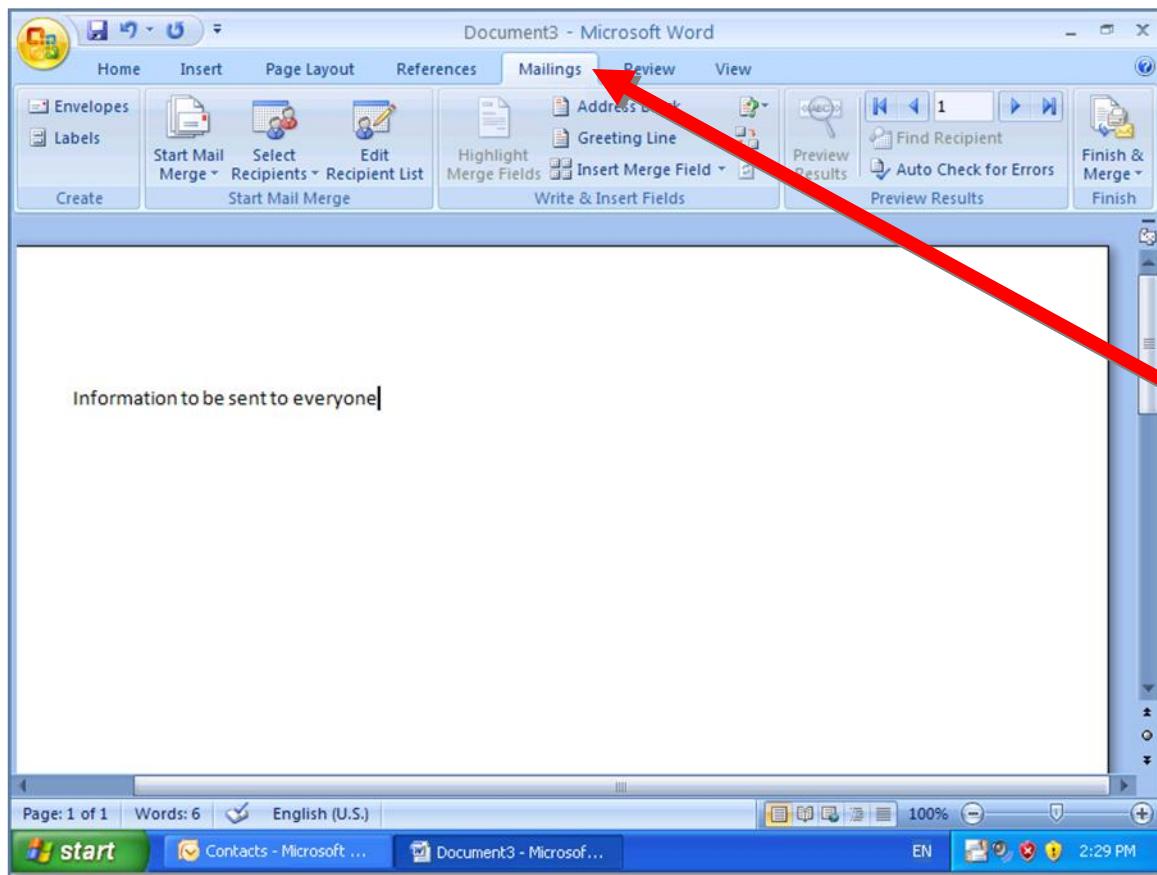


Select your *Contacts* from the option on the left hand side of the Outlook screen. Then Select **Tools**, the **Mail Merge**.



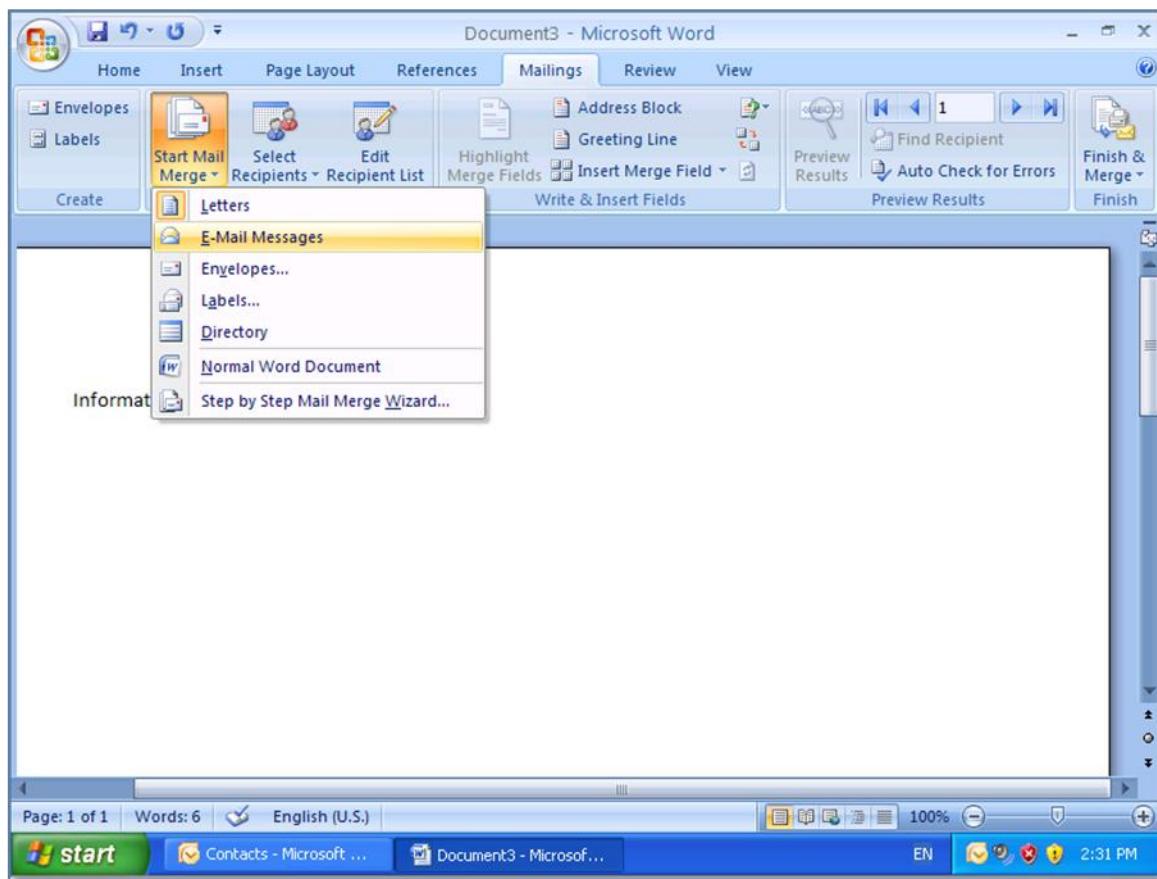
In the *Mail Merge Contacts* window you can set a number of different options. In this case we will be sending a new email to all the contacts in our list so no changes are required.

Press **OK** to continue.

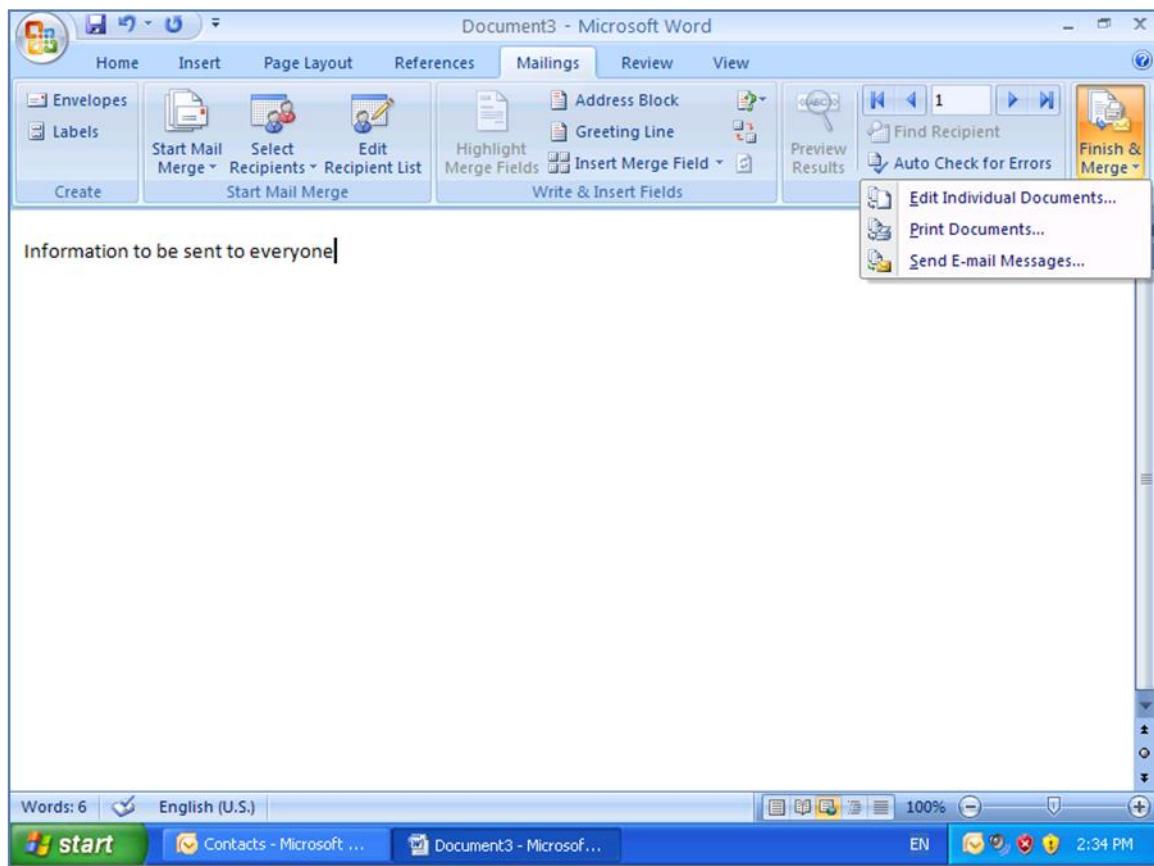


Word will now be displayed. Into this new document type the information you desire for all recipients.

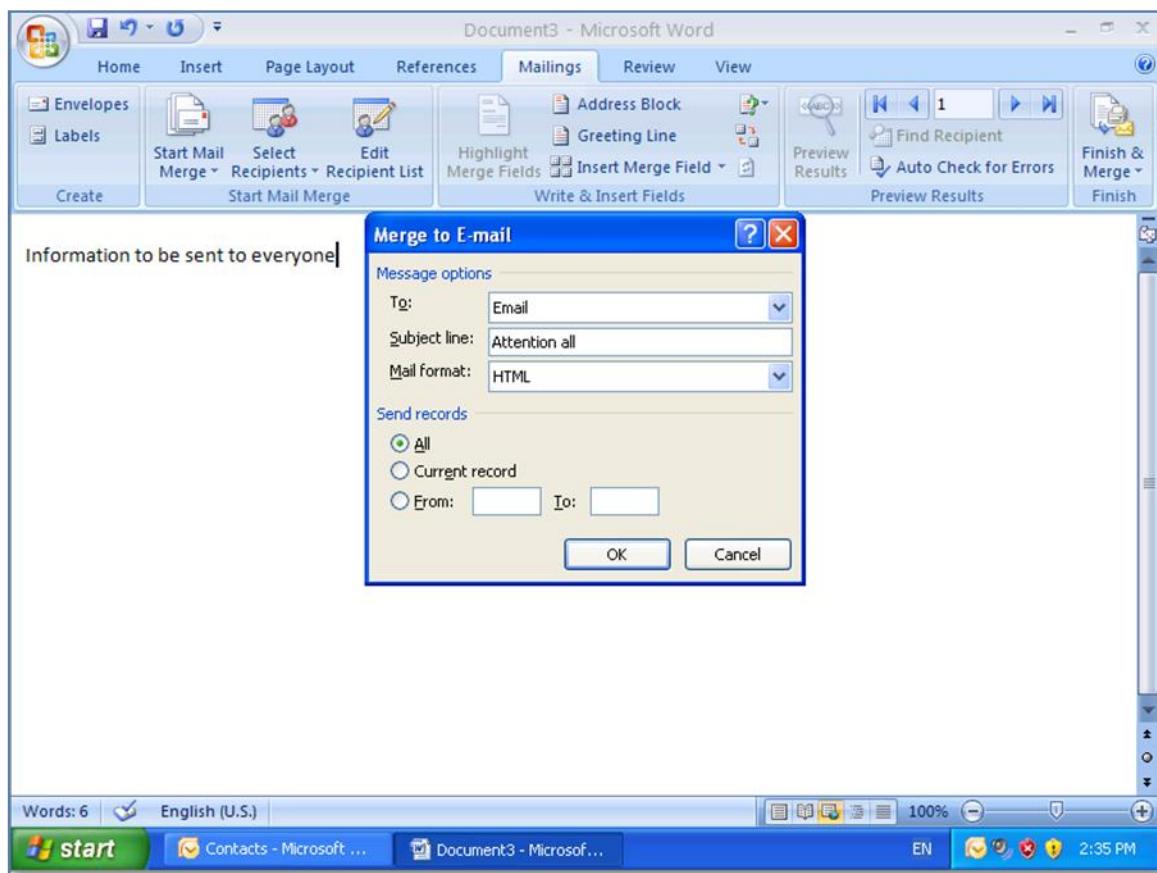
Ensure that the *Mailings* tab is selected before proceeding.



Ensure that *E-Mail Messages* is selected from the *Start Mail Merge* menu in Word.

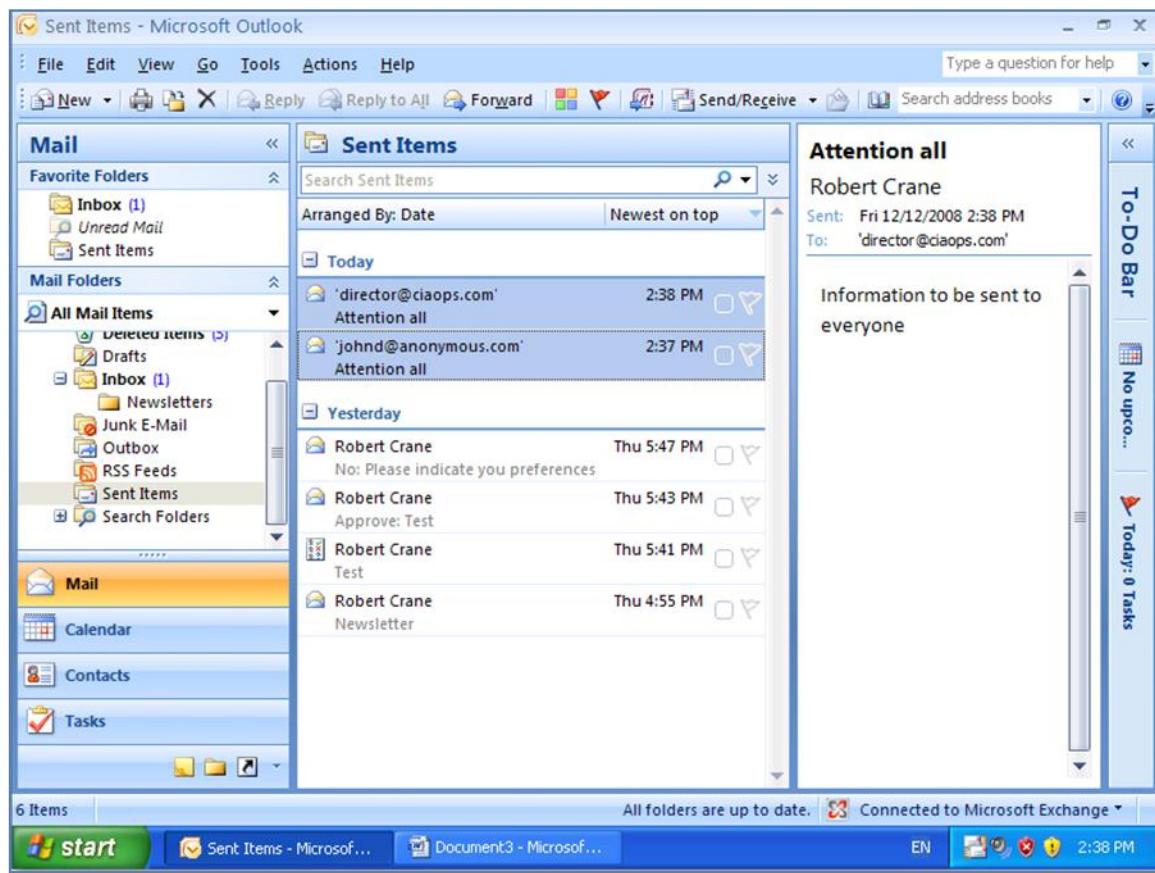


Select **Send E-mail Messages** from the *Finish and Merge* option.



You can now enter a *Subject line* and determine the *Mail format*.

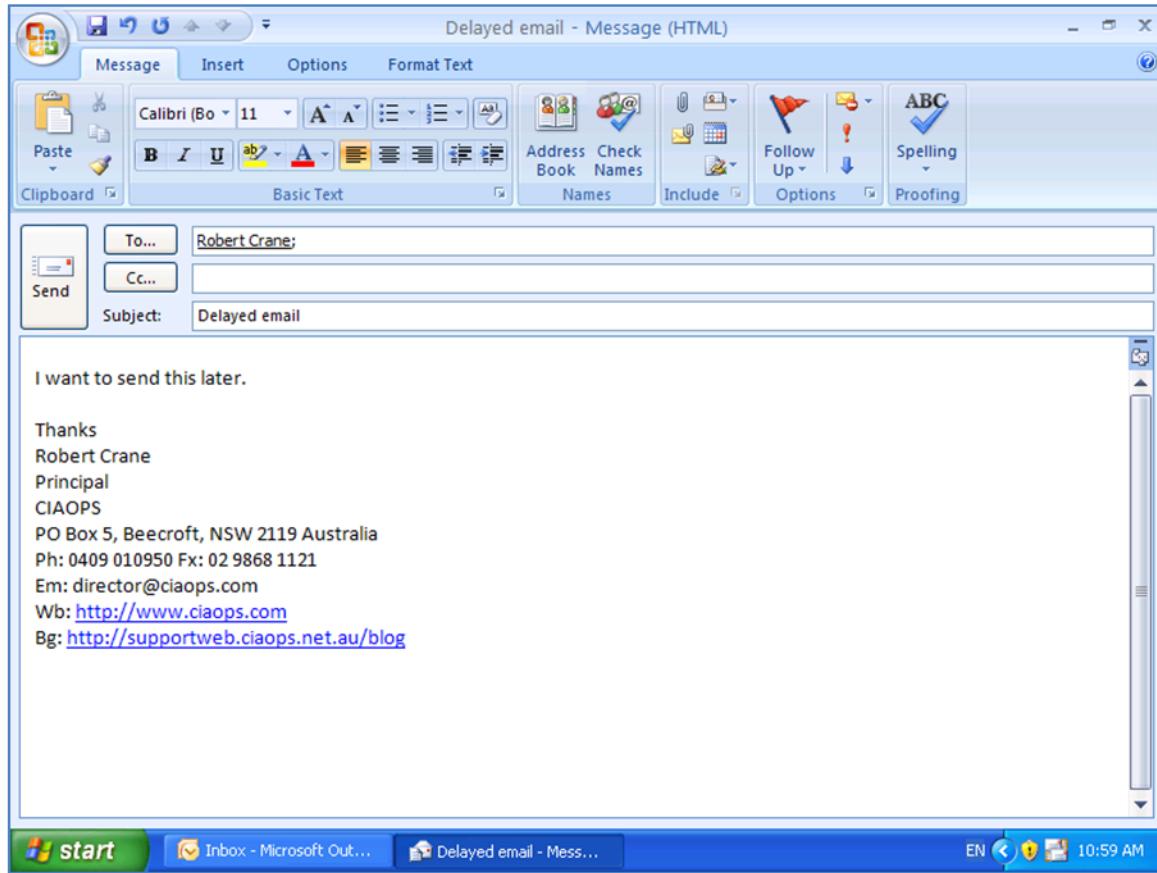
Press **OK** to continue.



If you now examine your Outbox you should find a copy of the email you just created in Word sent to the list of contacts you selected.

8. Send a single email at a certain time

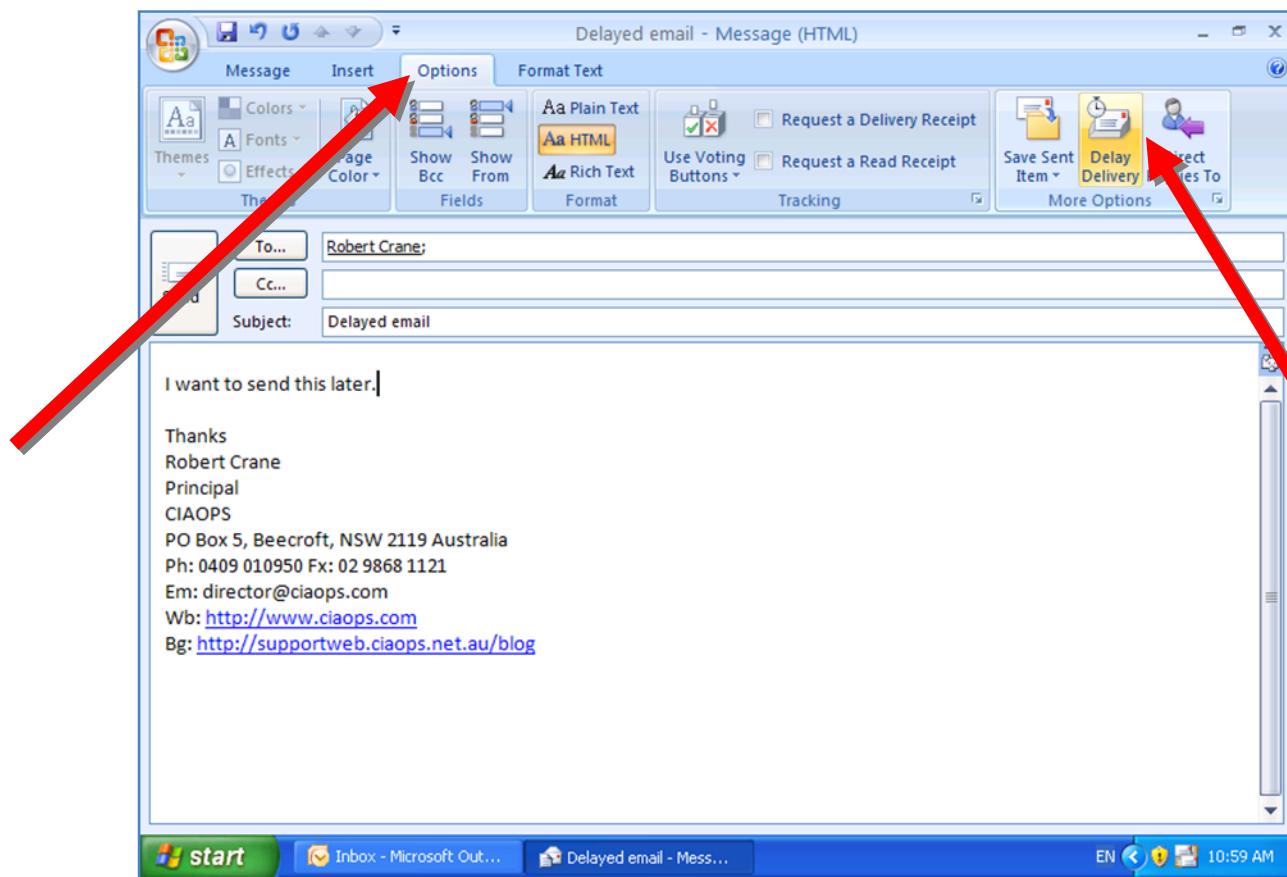
There may be times that you wish to compose or reply to an email but actually have it delivered at a later time. Doing this can prevent immediate replies from recipients which can distract you from other tasks.



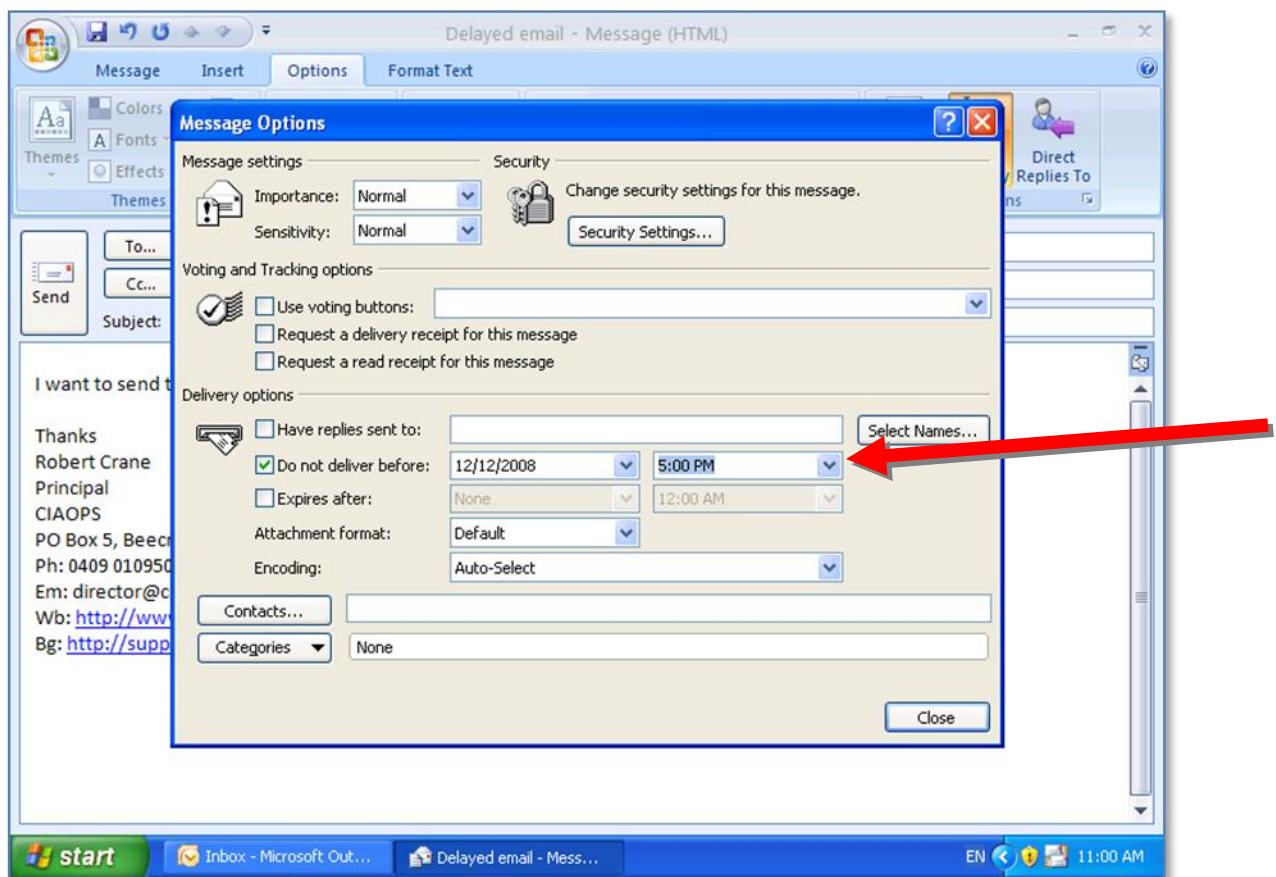
Compose an email as normal. Address the email to a recipient as normal.

Prior to sending the email select the **Options** tab.

A recent survey found that more than half of those asked spent two hours a day looking at emails while a quarter had at least 200 messages in their inbox at any time because they have no time to clear them.
(<http://www.guardian.co.uk/technology/2007/apr/15/news.newmedia1>)

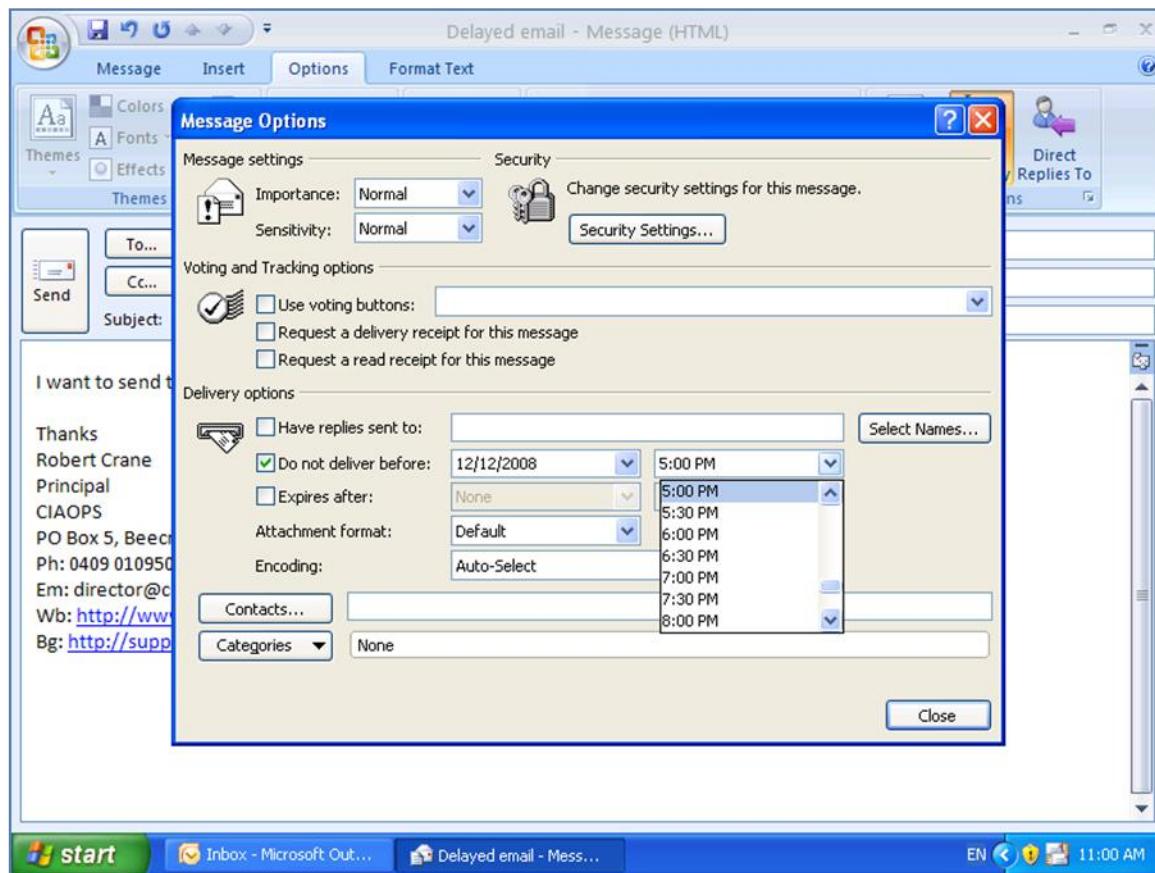


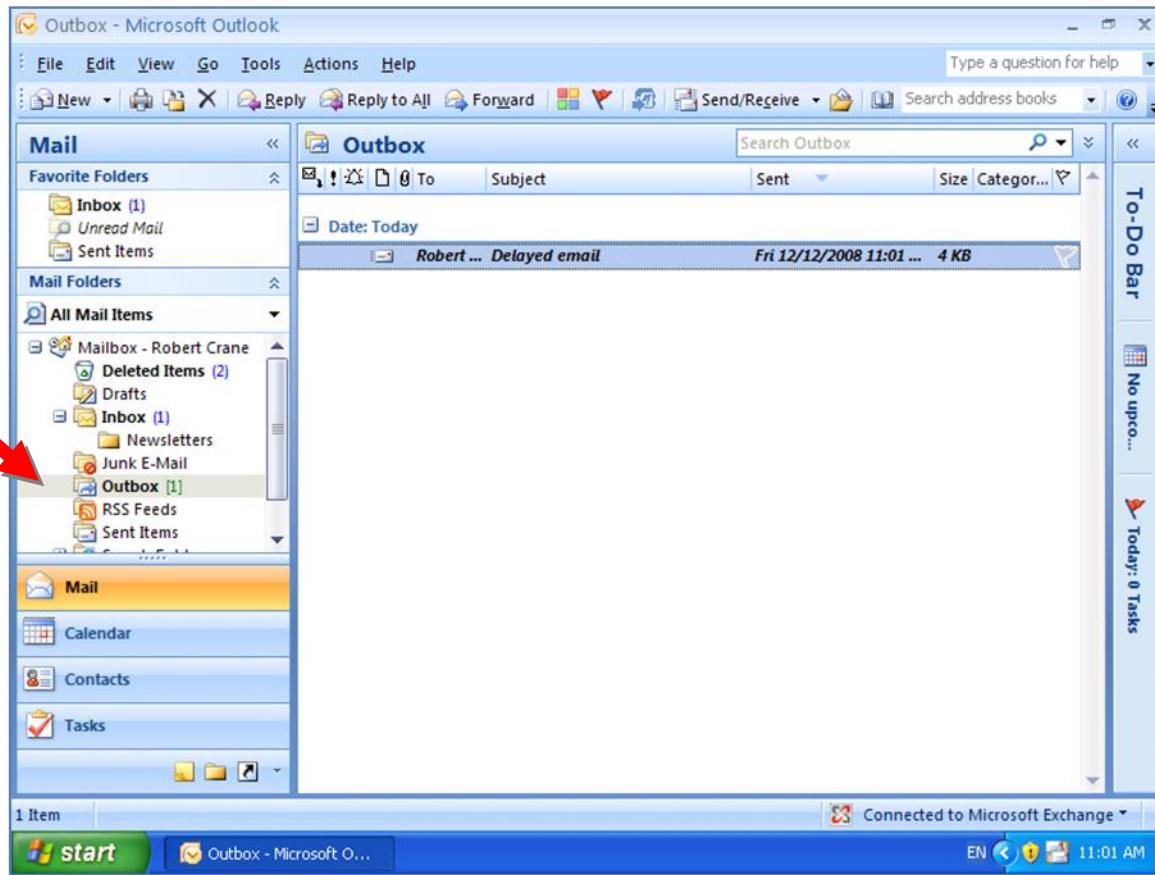
In the Options menu select **Delay Delivery**.



In the lower part of the *Message Options* window place a check in the box *Do not deliver before*. Into the remaining fields for this option specify a date and time for when the message will be delivered.

Select **Close**.

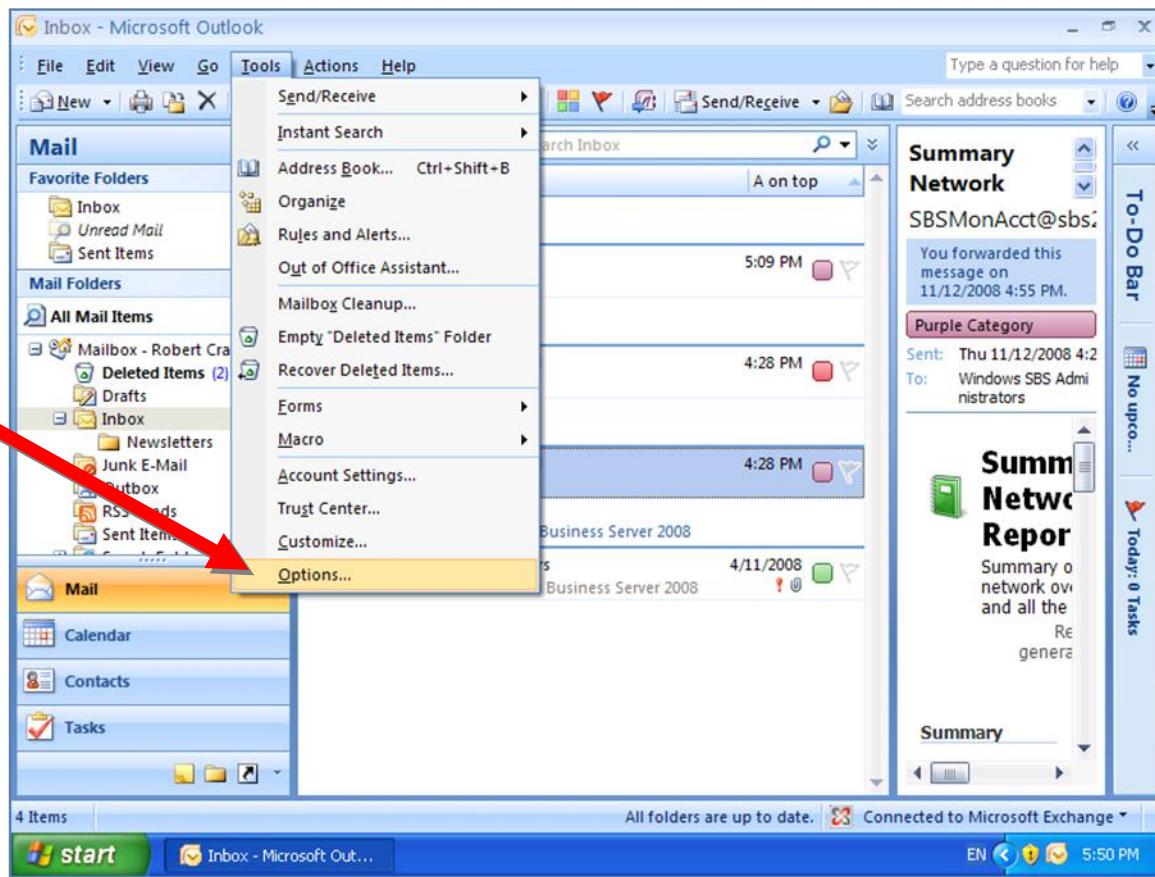




If you now send the message you should find that it remains in you *Outbox* until the time you specified arrives.

9. Create signatures

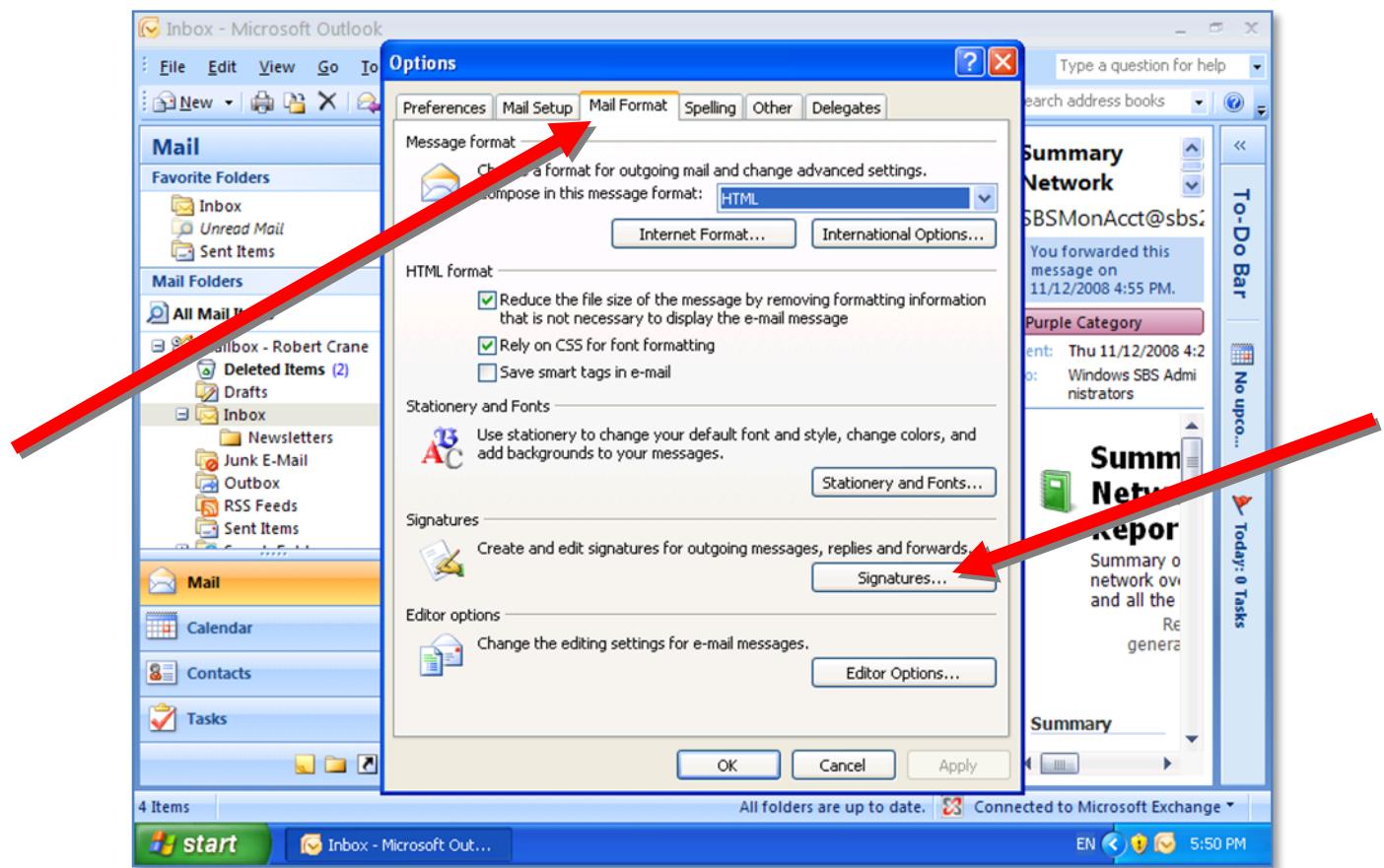
An email signature is information that can appear at the bottom of every email you send. It is especially handy for including your contact details or a legal disclosure. It can also be used as a way of standardizing replies to common email questions.



With Outlook open select **Tools**, then **Options**.

In a study last year, Dr. Thomas Jackson of Loughborough University, England, found that it takes an average of 64 seconds to recover your train of thought after interruption by e-mail. So people who check their e-mail every five minutes waste 8 1/2 hours a week figuring out what they were doing moments before.

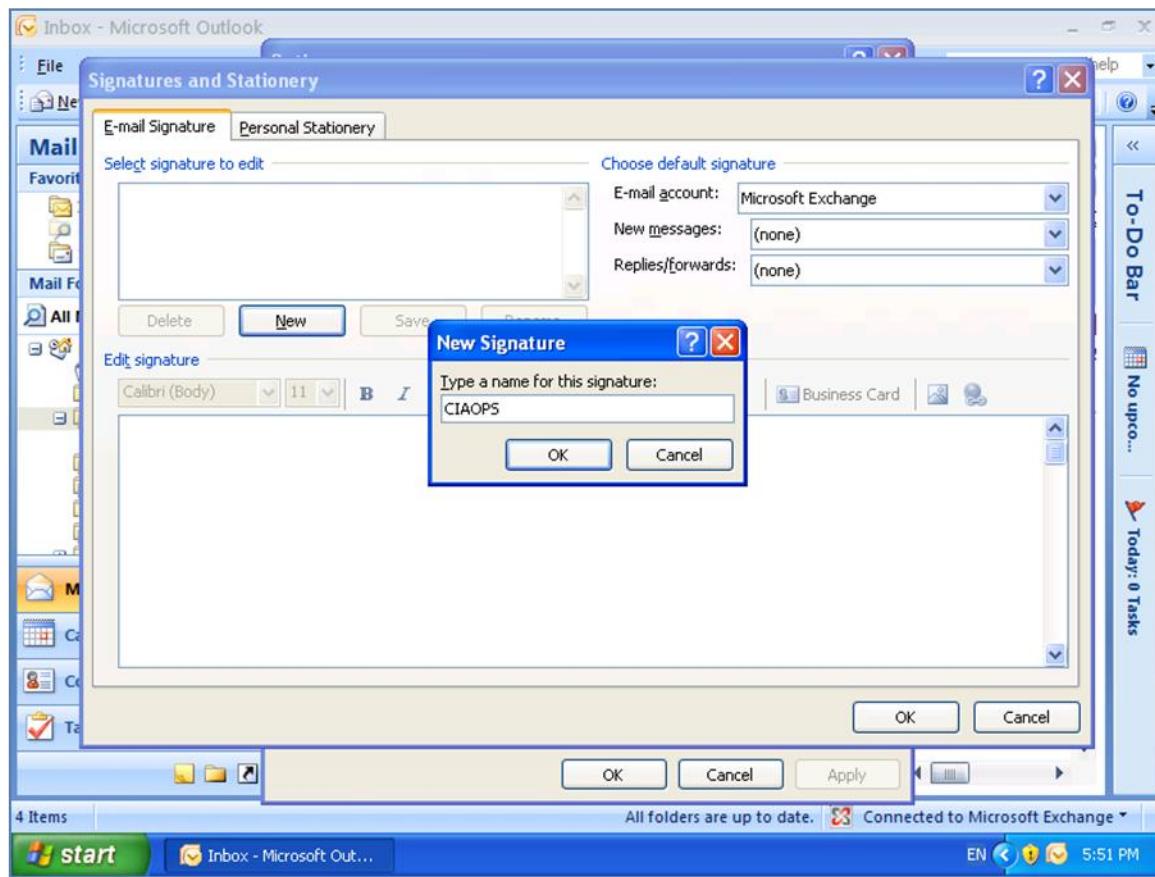
(http://news.cnet.com/8301-13846_3-10037909-62.html?part=rss&subj=news&tag=2547-1_3-0-5)



Select the **Mail Format** tab. Select the **Signatures** button under the *Signatures* heading from the lower part of the *Options* window.

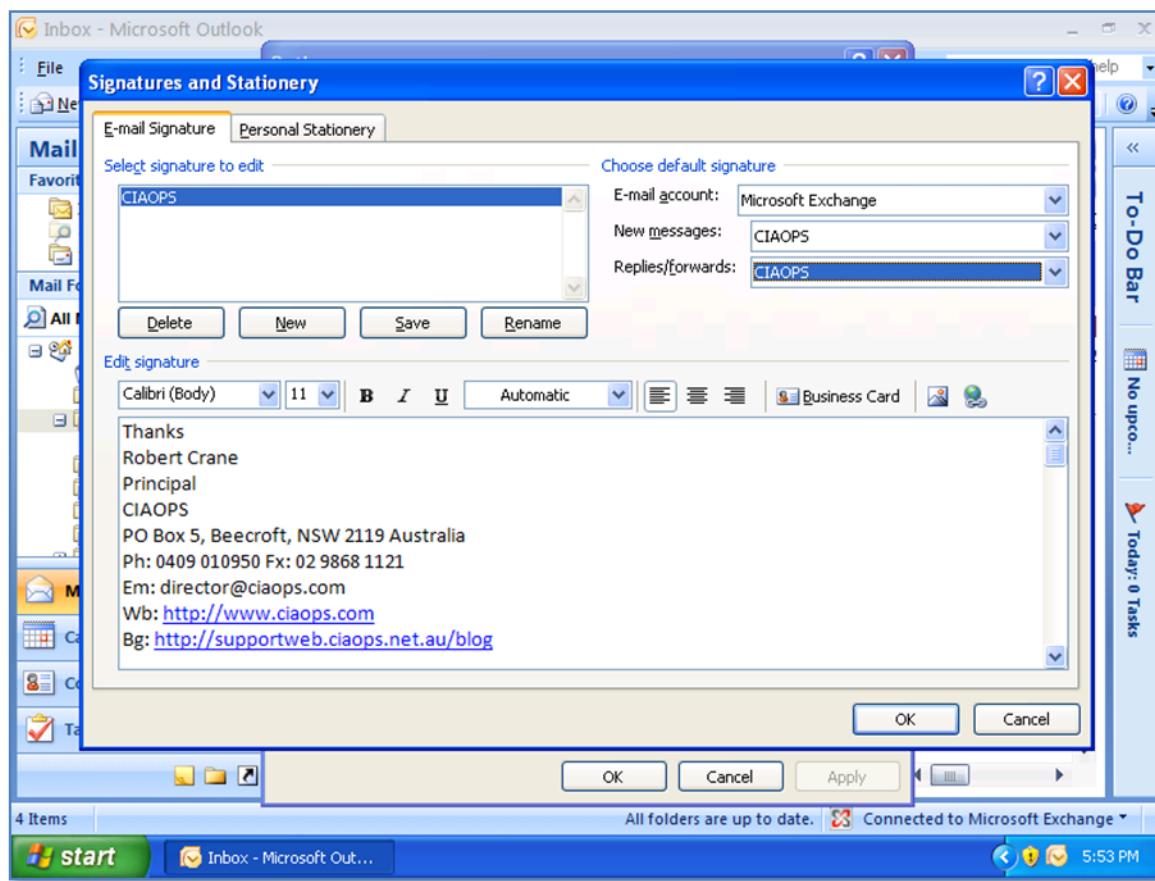


If no current signatures exist select the **New** Button.



Enter a descriptive name for the signature. Remember it is possible to have multiple signatures.

Press **OK** to continue.

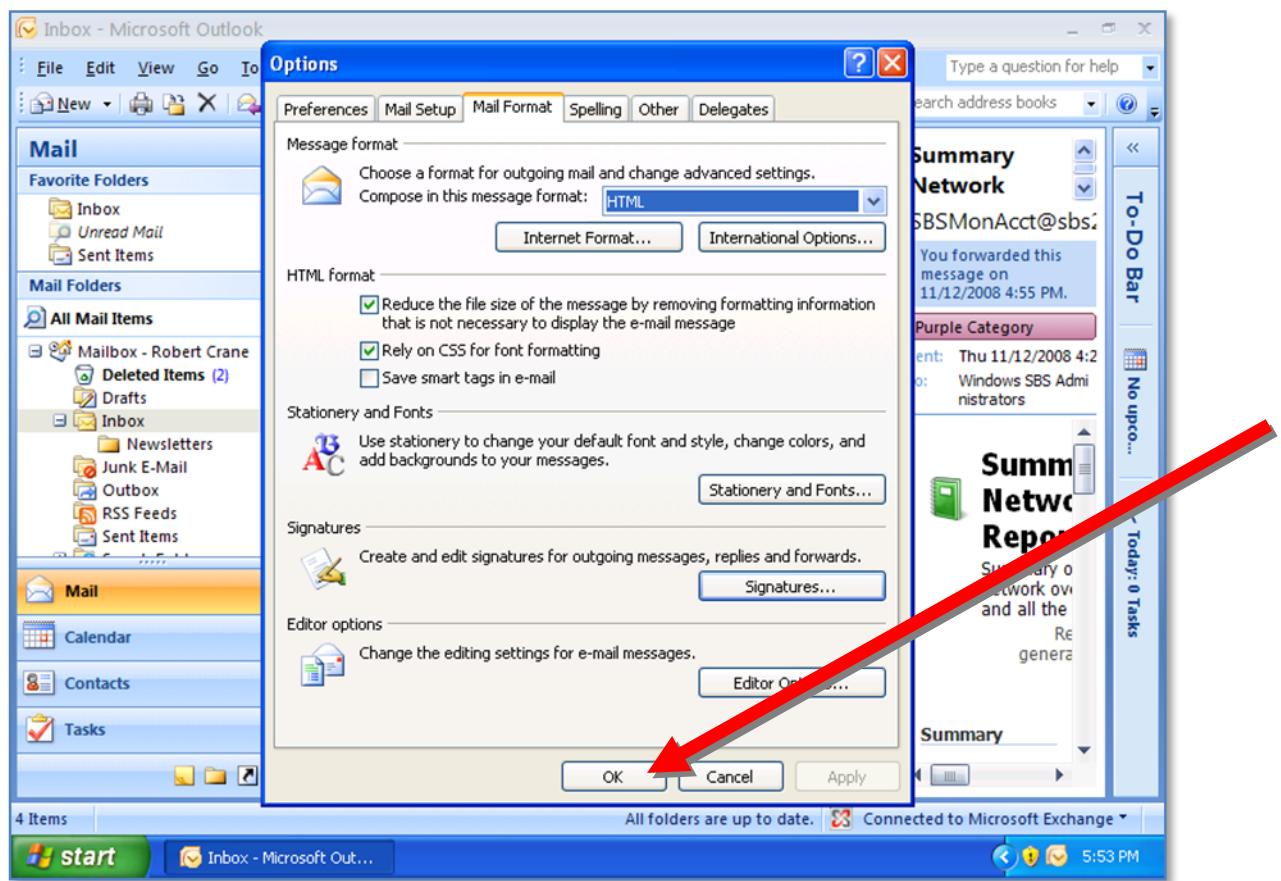


In the *Edit Signature* window at the bottom of the page you are able to create the desired signature. You may use different fonts and other formatting tools.

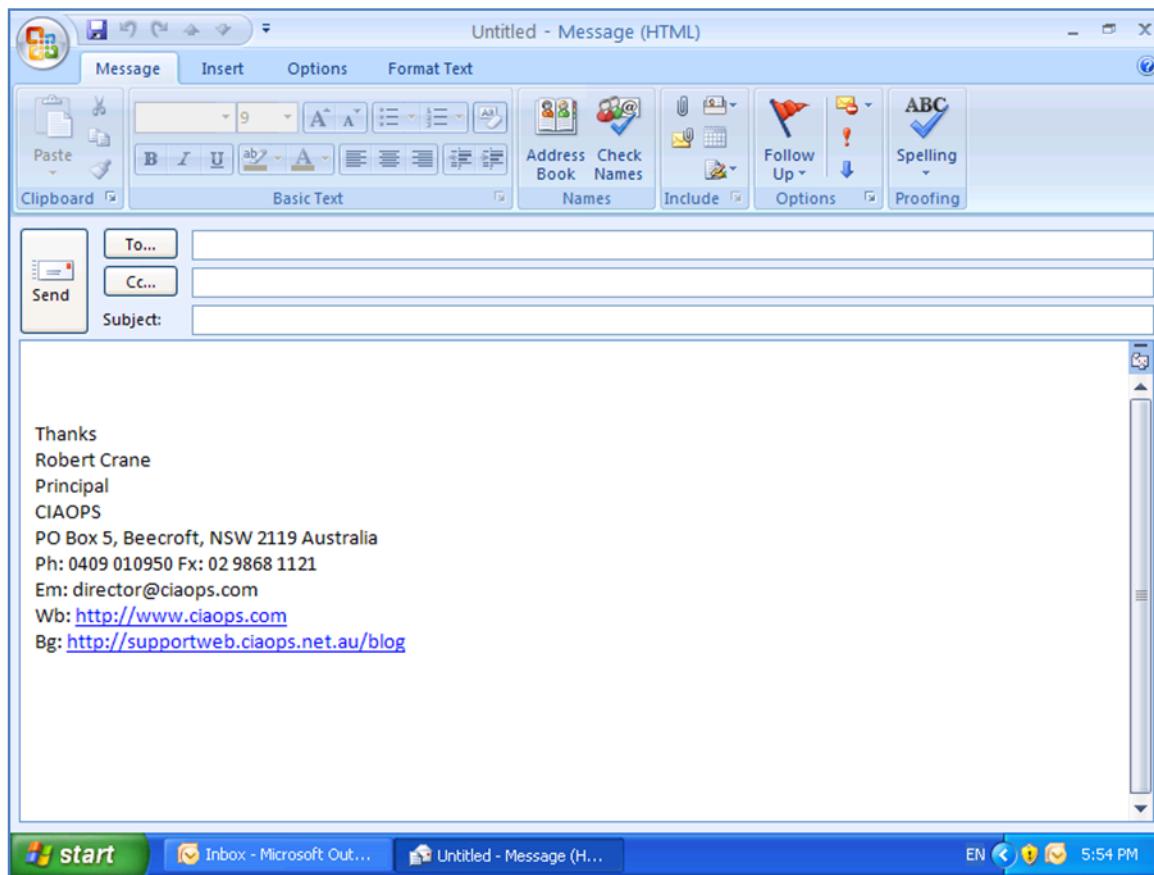
You can also choose to make this signature the default for new messages and replies by selecting the signature in the upper right of the window.

You can create as many signatures as required simply by selecting the **New** button each time.

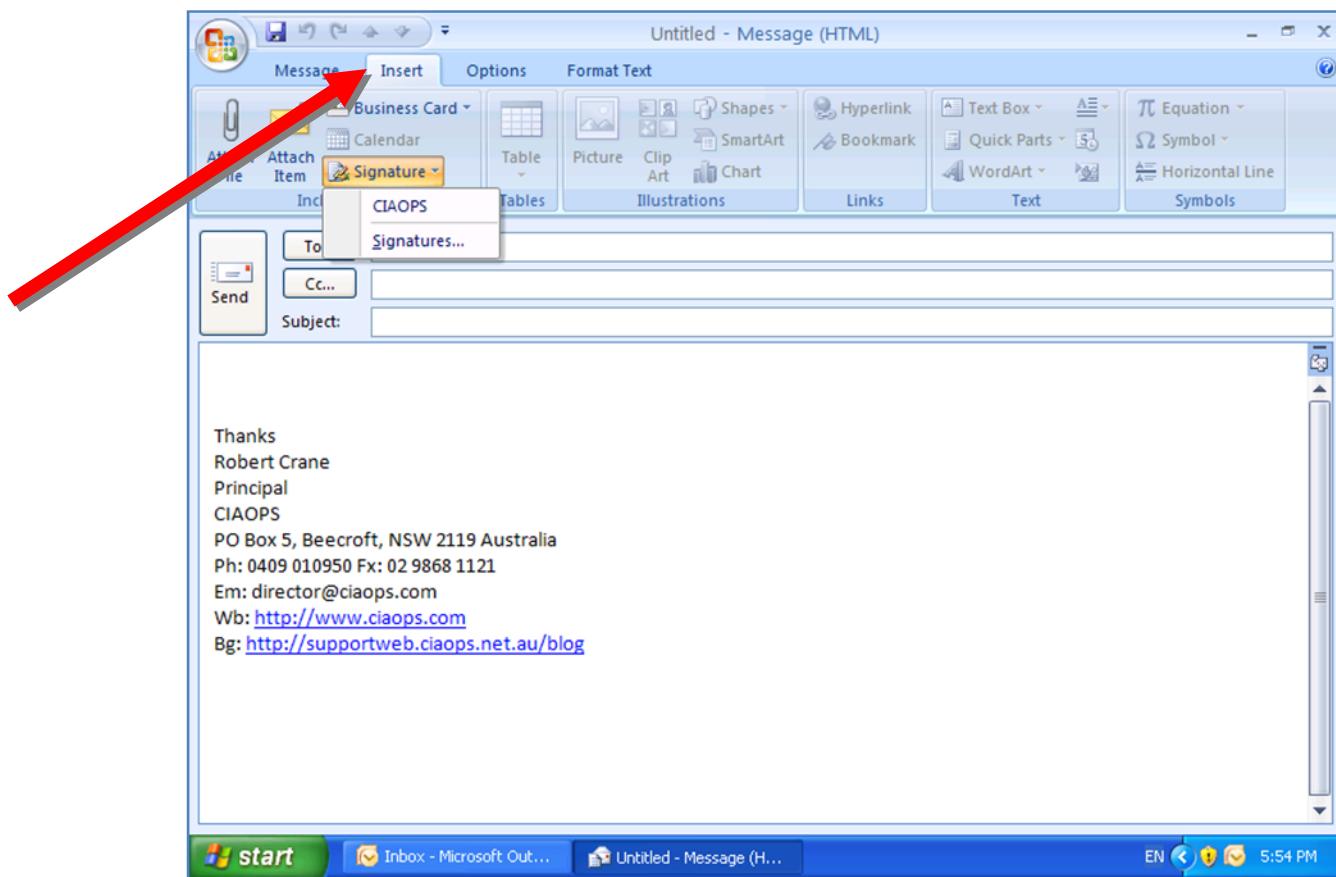
When the process is complete, press the **OK** button to exit.



You are now returned to the *Options* window. Select **OK** to close.



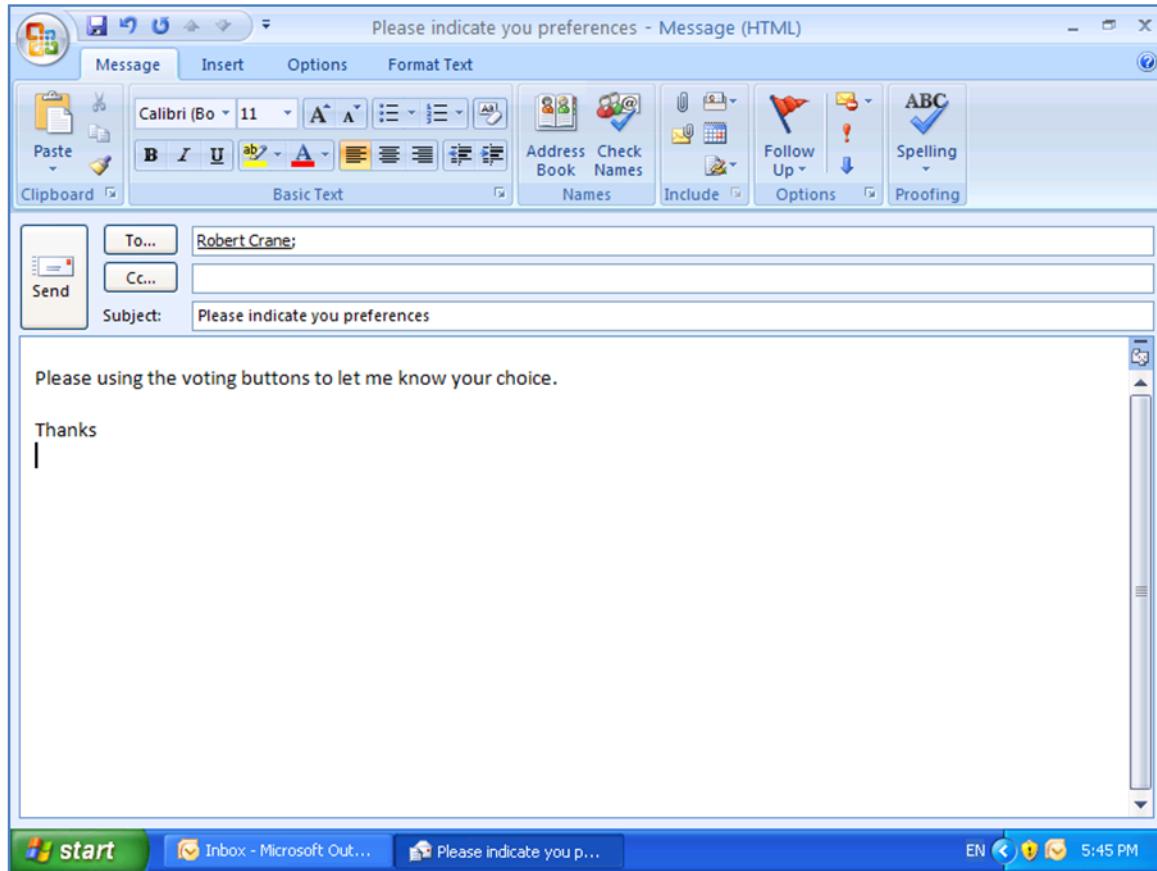
If you selected the option to embed a signature in any new email if you now create an email you should automatically see the signatures appear.



If you have created multiple signatures then you can select from them using the *Signature* option on the *Insert* tab.

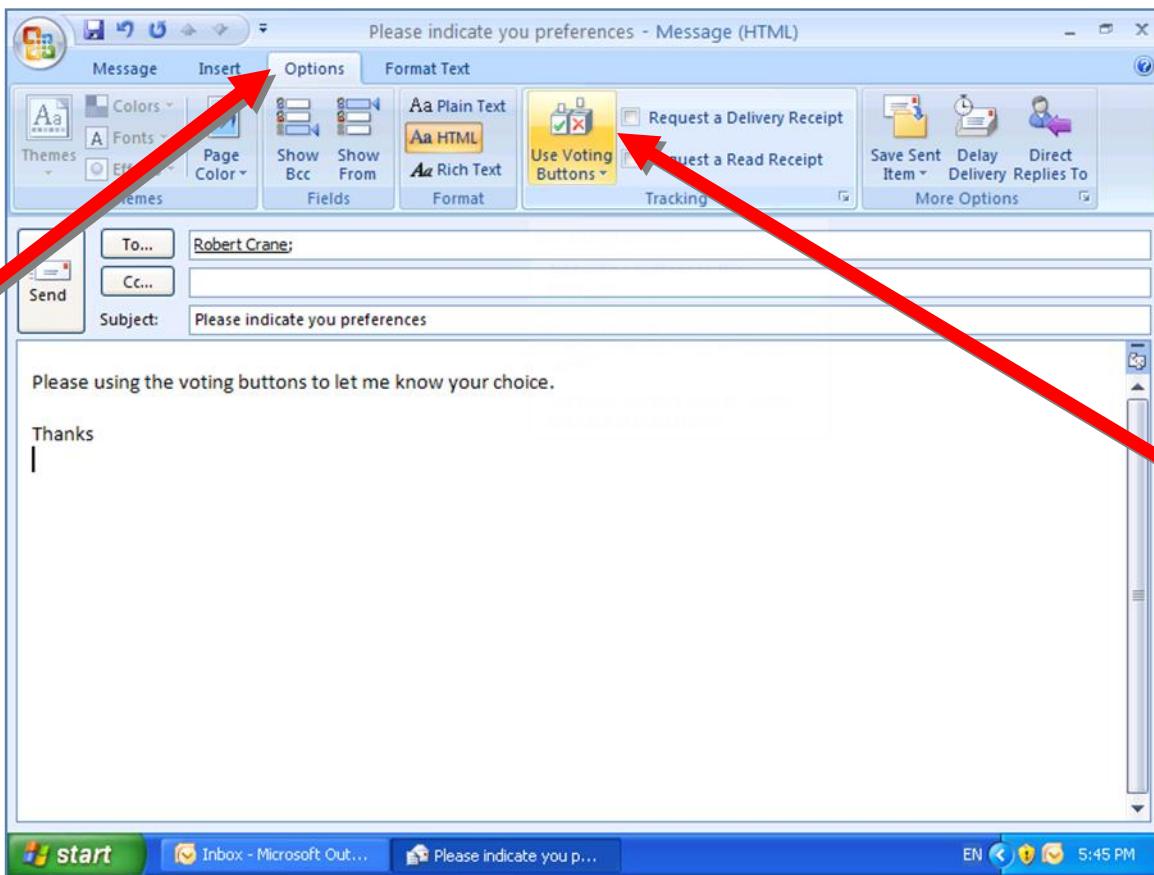
10. Use voting buttons

In many cases you only need a short reply from a recipient. A good way to facilitate this and keep track of people's preferences is by using voting buttons which are built into Outlook.

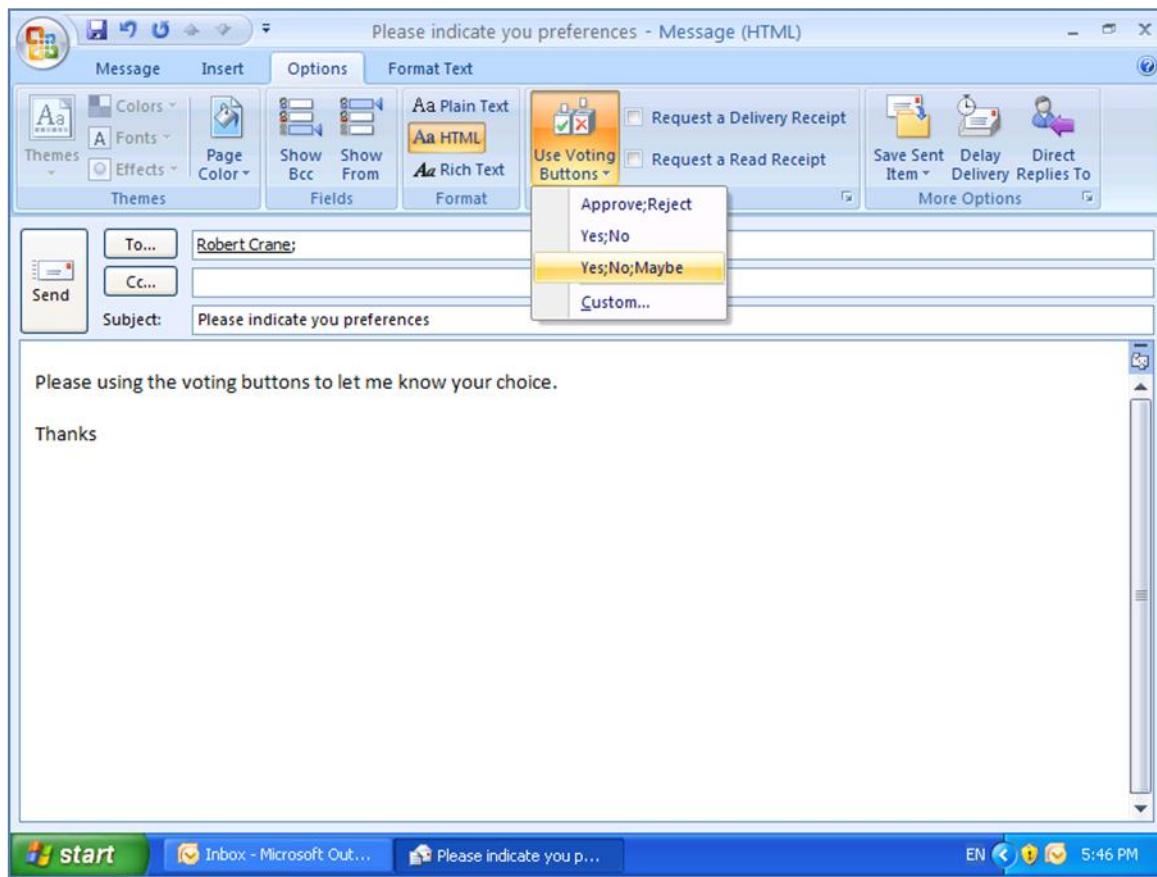


Compose an email as normal.

“We have to extend the range of human beings through tools they have to work with rather than through a sudden quantum jump in human ability.”
Peter Drucker, *The Effective Executive*

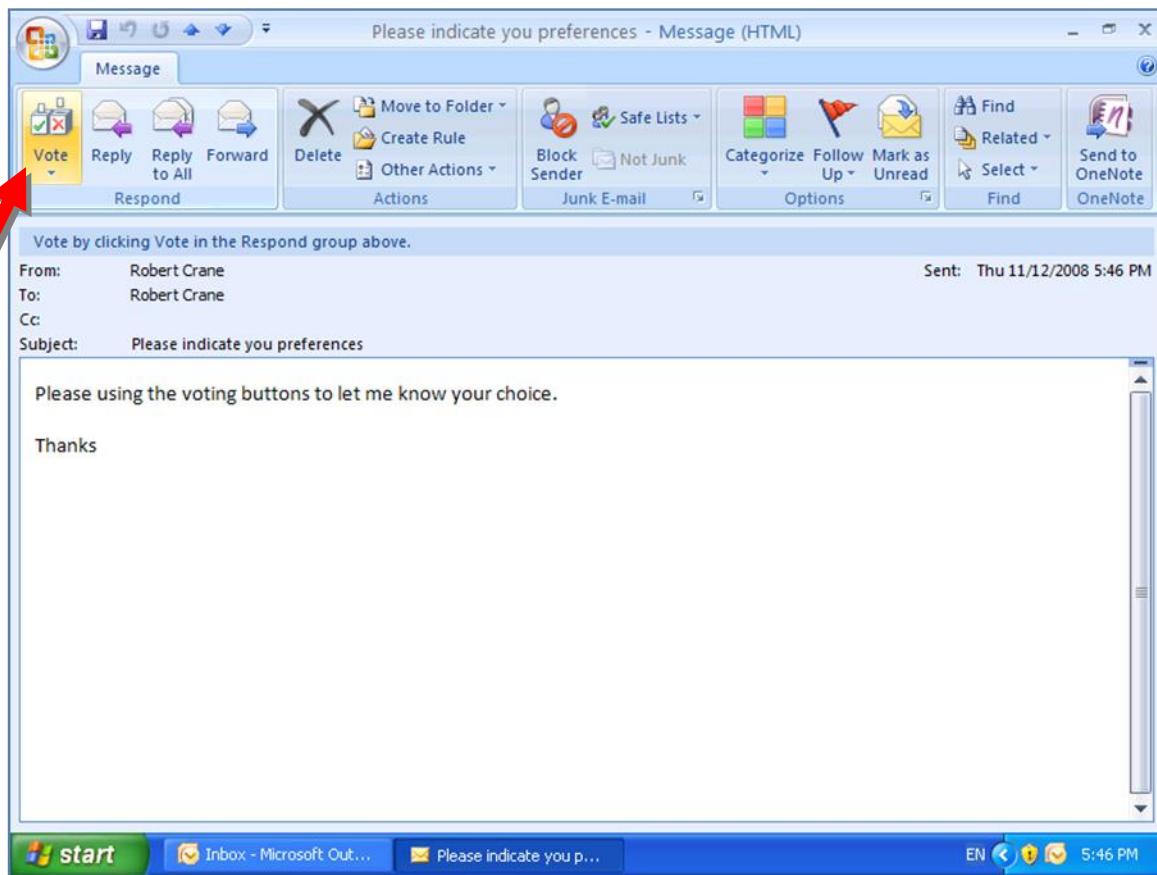


Select the **Options** tab, then select **Use Voting Buttons**.

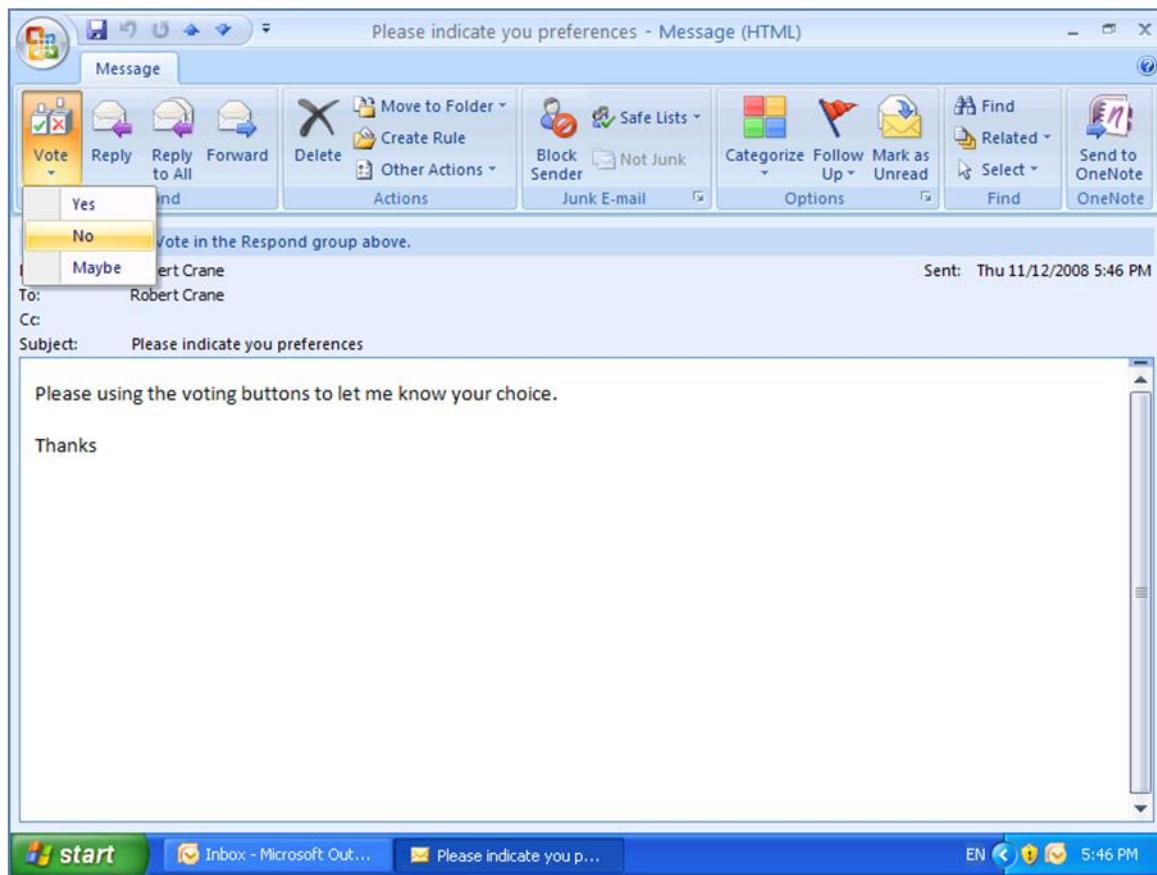


You can select from the default options that appear or alternatively you can select the *Custom* option to create your own.

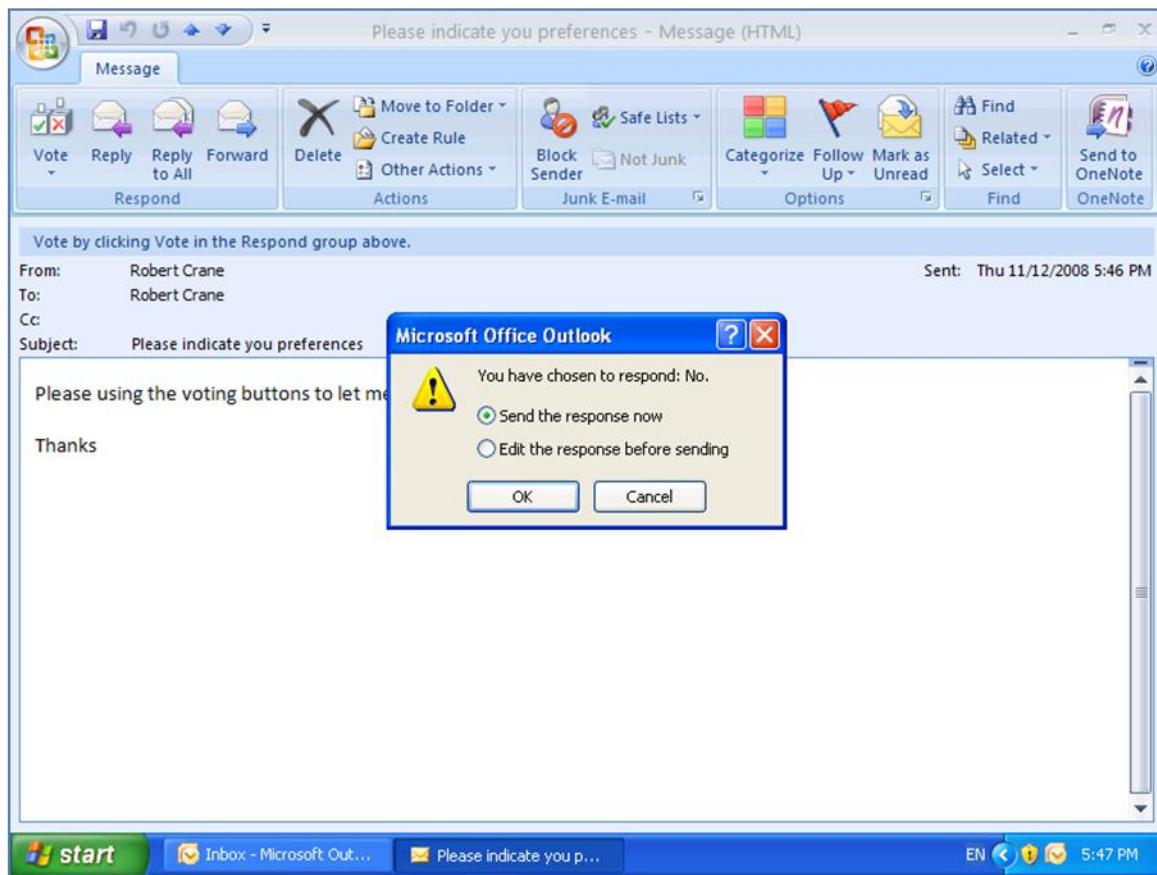
When complete send the mail out as normal.



The receiver will now have the option at the left hand side of the menu **Vote**.

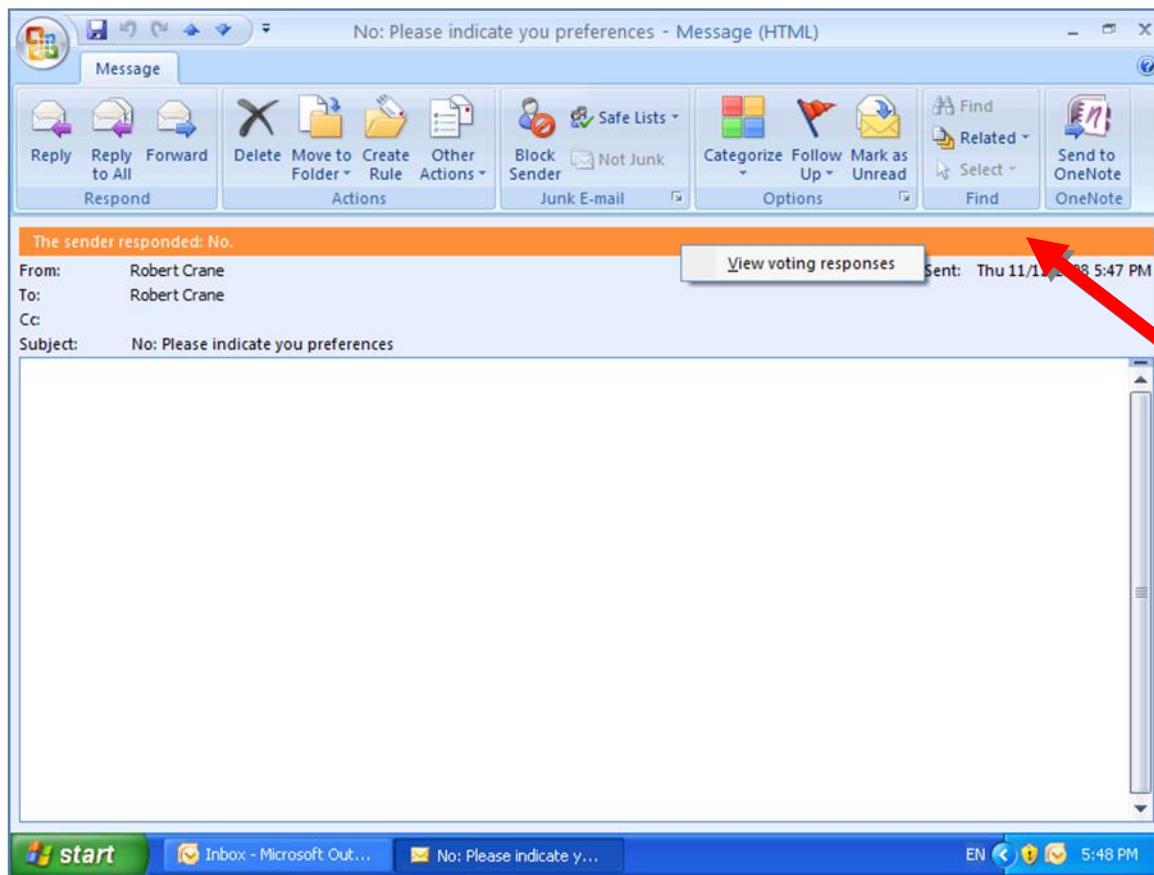


Selecting this allows them to choose an option you set up earlier.

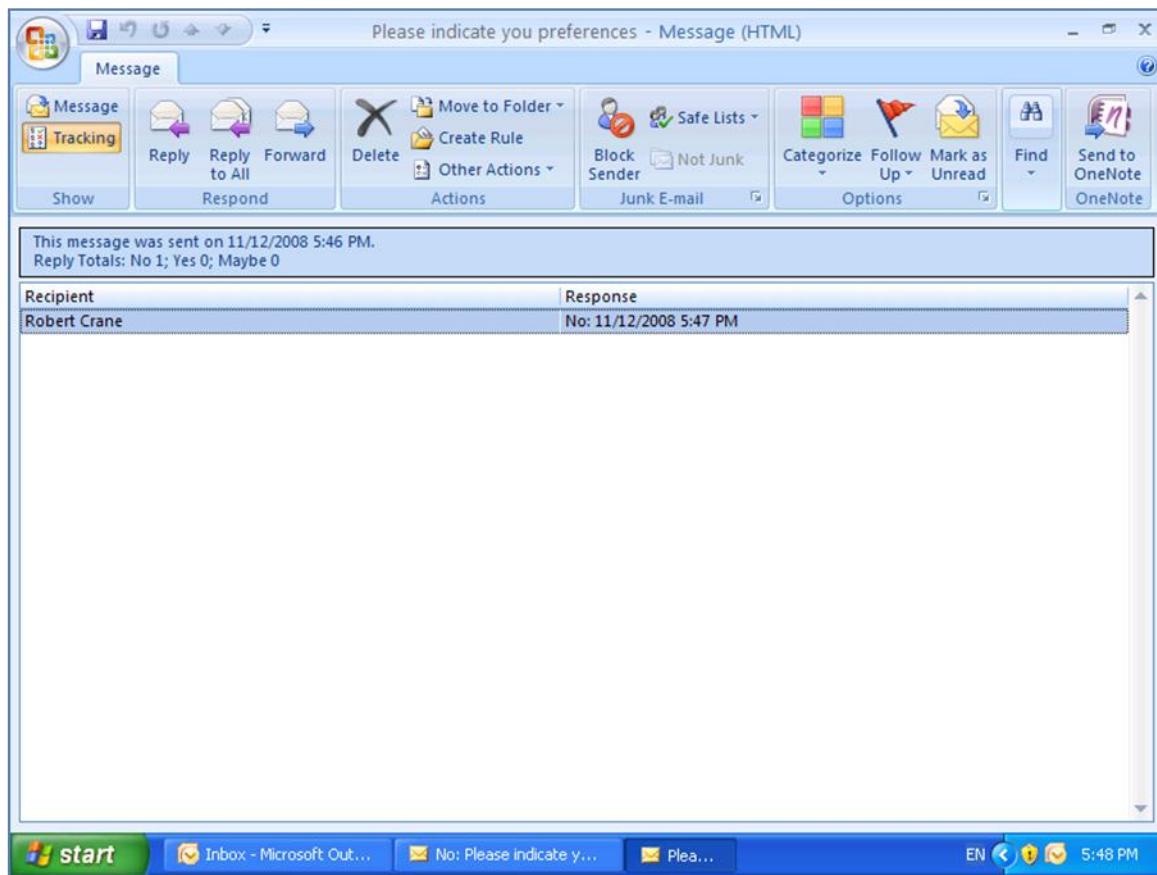


Once they have made this selection they can choose to *Send the response* immediately without adding anything further to the email or they can choose to *Edit the response* and add additional information to the email before they reply.

Make the desired selection and press **OK** to continue.



When you view the returned email you will see the voting preference of the respondent at the top of the email. If you click on the results bar you will see an option to *View voting responses*. Select this option to receive a summary of total of each vote from all respondents.



You can then see not only the total votes (at the top) but also how each respondent voted.

Conclusion

Hopefully this booklet has given you greater insight into some of the features and functions of Outlook. Through these simple insights you can appreciate how much different simple changes to the way Outlook is set up can have a huge impact on your day to day productivity.

For more help with productivity visit www.ciaops.com.

Author - Robert Crane BE MBA MCP

Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 15 years of IT experience in a variety of fields and positions, including working on Wall St in New York. He is the founder and principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars as well as write on a number of topics. He can be contacted via director@ciaops.com.

“The productivity of work is not the responsibility of the worker but of the manager.”
Peter Drucker