CHAPTER 7

EMAIL TECHNIQUES

InFocus

Outlook provides many options and techniques that you can adopt as you work with email messages.

In this session you will:

- ✓ gain an understanding of some techniques you can use to effectively manage email
- √ learn how to recall a sent message
- ✓ learn how to print a message
- ✓ learn how to print a message list
- ✓ gain an understanding of the various formats that can be used for messages
- ✓ learn how to change the message format for individual messages
- ✓ learn how to select a desired theme or stationery
- learn how to apply a theme or stationery to single messages
- ✓ learn how to turn off the *Outlook* themes or stationery feature
- ✓ learn how to apply a theme to a new message
- ✓ learn how to save a message as a draft
- ✓ learn how to use a saved message
- ✓ learn how to send a message with voting buttons
- ✓ learn how to respond to a voting message
- ✓ learn how to track voting responses
- ✓ learn how to send automatic responses.

EFFECTIVE EMAIL MANAGEMENT

As you become more and more familiar with email you'll understand why it is so popular. Because of its widespread use you'll probably soon find yourself swamped with emails. As a

consequence of this, you'll need to adopt some sound techniques for managing the influx of electronic mail. Below are some techniques for managing your email more effectively.

Create A Hierarchy Of Folders And Name Them Sensibly

In many ways your Inbox is a little like your hard disk – and just like the files on your hard disk you can create and name folders to help manage your emails more effectively. Personal folders can be created below almost any folder in Outlook, however, the most logical place is under your Inbox.

You should create a logical sequence of folders and name them so that you can use them quickly to locate an email that you may need to reference in the future. For example, if you purchase goods online over the Internet most suppliers will send you an electronic receipt via email. It is a good idea to place these email receipts in a special *Receipts* folder so that you can refer to them at any point without having to search your entire Inbox.

Move Messages Out Of The Inbox

Once you've created a hierarchy of folders, get into the habit of moving messages that you wish to retain out of the Inbox and into the relevant folder you've set up. Keeping the Inbox squeaky clean is akin to working with a tidy desk.

This will help you to quickly see new incoming messages. Also, by moving the emails for follow-up into more meaningful folders you are less likely to accidentally delete them while cleaning up your Inbox.

If you regularly move emails to specific folders, the quickest method for performing this function is to set up and use *quick steps*. Using a quick step, you can perform multiple tasks on the selected message with just a single click.

Delete Email You Don't Require Immediately

If you get an email and don't need it, get rid of it. You can do this permanently and instantly by selecting the message, holding down shift and pressing beld. If you think you don't need a message, delete it into the **Deleted Items** folder (you can do this by pressing beld or clicking on **Delete**). Since the **Deleted Items** folder is a temporary location at least if you do find you need a deleted message later, you can recover it again.

Periodically, purge the *Deleted Items* folder to free up system resources and keep your email manageable.

Use Contact Groups

If you email the same message to a number of people on a regular basis, set up *contact groups* in Outlook Contacts. A contact group is simply a group of email addresses that you choose from existing Contacts. Outlook then allows you to save this list as a single entry in Contacts. When you need to send these people an email you simply click on the Group name rather than having to select each address individually.

There are virtually no limits to the number of contact groups that you can have in Outlook and they provide a great way to manage your outgoing email messages.

Utilise Conversation View

Conversation view groups all messages with the same subject and then displays only the latest message in the message list. You can expand a conversation to see all messages as necessary. To turn on **Conversation view**, tick **Show as Conversation** on the **View** tab.

In **Conversation view**, you can use **Clean Up Conversation/Folder** to delete all redundant messages in a conversation – that is, all messages other than the most recent one except for messages that have not been read, are flagged, are categorised, or include attachments.

You can also use *Ignore Conversation* to delete all messages in a conversation that is no longer relevant, plus any future replies you may receive for the same conversation. If you change your mind later, you can reverse the process.

RECALLING A SENT MESSAGE

Imagine sending a message and realising that some of the information is wrong or that you forgot to attach the file that you've referred to in the message. If both you and the recipient of your message use Microsoft Exchange Server, you can recall the message. Exactly how successful the recall will be will depend on whether or not the recipient has opened the message.

Try This Yourself:

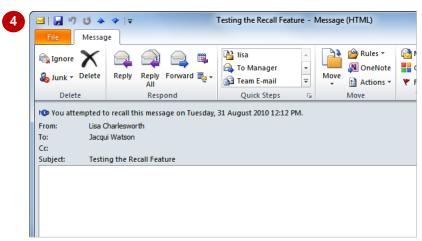
- Continue using the previous file with this exercise...
- Create a new message and send it to a colleague
- Click on Sent Items and then double-click on your message
- Click on Actions on the Move group and select Recall This Message to open the Recall This Message dialog box
- Ensure that Delete unread copies of this message and Tell me if recall succeeds or fails for each recipient are selected, then click on [OK]
- 5 Close the message
 If the recipient hasn't
 opened your message,
 Outlook will delete it and
 you will receive a Message
 Recall Success notification.
 If the recipient has opened
 your message, the recall
 will fail and you will receive

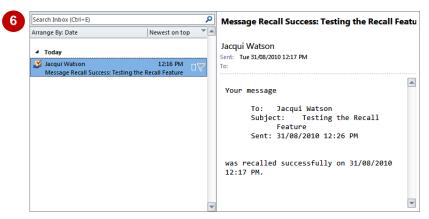
a Message Recall Failure

After a few minutes, click on *Inbox* to see the *Message Recall* notification

notification...







For Your Reference...

To **recall** a **sent message**:

- 1. Double-click on the message in Sent Items
- 2. Click on *Actions* in the *Move* group and select **Recall This Message**
- 3. Select the desired options
- 4. Click on [OK]

Handy to Know...

 Most home and personal accounts do not use Microsoft Exchange. So for example, if you have sent an email to someone's personal internet service provider (ISP) POP3 email account, you will not be able to recall the sent email message.

PRINTING A MESSAGE

Even though the whole idea of electronic mail messaging is to avoid or at best minimise paper usage, there will be times when you want or need to print an email message. You can print a message from any of the Mail folders or directly from an open message using the *Backstage*. You can also preview the message in the *Backstage* before printing it.

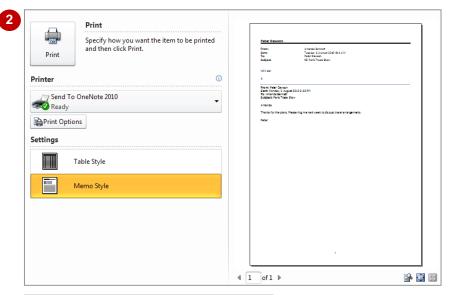
Try This Yourself:

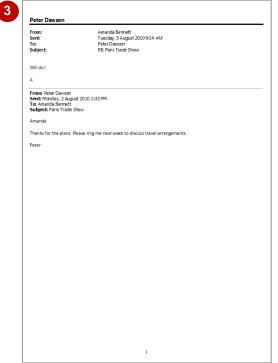
- Continue using the previous file with this exercise, or open the file Watsonia_11.pst...
- Click on the Amanda
 Bennett message with
 the RE: Paris Trade
 Show subject
- Click on the *File* tab and click on *Print* to display the print settings
- 3 Select the desired Printer and ensure that Memo Style is selected under Settings

Notice that the message will print in a style similar to a memo...

Click on [Print] to print the message or press

Esc to return to the Inbox





For Your Reference...

To *print* a message from a message list or an open message:

- 1. Click on the File tab
- 2. Click on Print
- 3. Select Memo Style in Settings
- 4. Click on [Print]

- You can print the attachments in your message by clicking on [Print Options] in the Backstage to open the Print dialog box and then ticking Print attached files.
- You can click on [Define Styles] in the Print dialog box to edit or create new Print styles.

PRINTING A MESSAGE LIST

There may be times when you want a hard copy of the messages listed in one of your Mail folders or perhaps you might want to print a list of all messages that you've received from a particular sender. To achieve this, you can either perform a search to display only the required messages in the message list or select the specific messages in the message list before accessing the **Backstage**.

Try This Yourself:

Continue using the previous file with this exercise, or open the file Watsonia_11.pst...

Click on *Inbox* to ensure that it is currently displayed

Let's print a list of all messages in the message list.

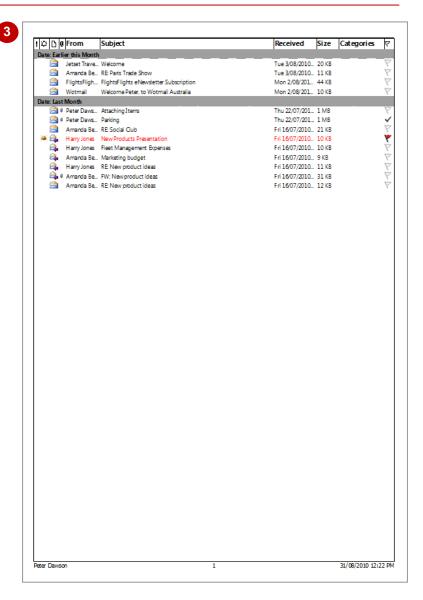
If you wanted to print specific messages, you could search for them by clicking in Instant Search and typing the desired criteria...

- Click on the *File* tab and click on *Print* to display the print settings
- 3 Click on *Table Style* under *Settings*

The preview shows that all of the messages included in the message list will be printed...

Click on [Print] to print the message list or press

[Esc] to return to the Inbox



For Your Reference...

To print a message list.

- 1. Click on the Mail folder
- 2. Sort and lay out the folder as desired
- 3. Click on the File tab, then click on Print
- 4. Select Table Style in Print style
- 5. Click on [Print]

Handy to Know...

 You can print a list of selected messages in the current folder. To do this select the desired messages, click on the *File* tab, click on *Print* and select *Table Style* under *Settings*. Click on [Print Options], select *Only selected rows* under *Print range* and then click on [OK]. Click on [Print].

MESSAGE FORMATS

Not all email applications are alike so you need to use a message format that your recipient's application supports. Outlook supports three formats. The format you choose will determine

what your message can contain – bold fonts or being able to add pictures in the message body etc. If a recipient's mail application supports the format, they will see the message just as you created it.

HTML (Hypertext Markup Language)

HTML is the default message format used by Outlook. It is also the best format to use when you want to create messages that are similar to documents that you can produce in Microsoft Word. For example, you can include various fonts, colours, bullet lists and tables using HTML format.

By default, when you select either HTML or RTF (both of these options allow you to format message text), the message will be sent in HTML format. Thus, at least when you use HTML, you know that what you send is what the recipient will see – as long as their mail application supports HTML.

Plain Text

The *Plain Text* format is supported by all email applications. Plain text doesn't support features such as bold, italic, colours, fonts, or other text formatting. It also doesn't support pictures that are displayed directly in the message body, although you can include pictures as attachments. If you have security concerns about reading HTML-formatted messages, you can set Outlook to open all messages in plain text format. (To do this, select *File* > *Options* > *Trust Centre* > *Trust Centre Settings* > *E-mail Security* and tick *Read all standard mail in plain text* under *Read as Plain Text*.) Be aware, however, that reading messages in plain text does not provide full protection against all email hazards.

Outlook Rich Text Format (RTF)

Outlook RTF is a Microsoft format that only the following email applications support:

- Microsoft Exchange Client versions 4.0 and 5.0
- Microsoft Outlook 2010
- Microsoft Office Outlook 2003 and 2007
- Microsoft Outlook 97, 98, 2000 and 2002

You can use RTF when sending messages within an organisation that uses Microsoft Exchange Server; however, it is still recommended that you use HTML format.

RTF supports text formatting, including bullets, alignment and linked objects. By default, Outlook automatically converts RTF-formatted messages to HTML when you send them to an internet recipient so that the message formatting is maintained and attachments will be received. Outlook also automatically formats meeting and task requests and messages with voting buttons so that these items can be sent intact across the internet to other Outlook users, regardless of the default format of the message. If an internet-bound message is a task or meeting request, Outlook will automatically convert it to internet Calendar format, a common format for internet calendar items, so that other email applications can support it.

CHANGING THE MESSAGE FORMAT

HTML is the default message format used to create messages in Outlook. But you don't have to use HTML message format. For example, if you want to create a new message for a recipient

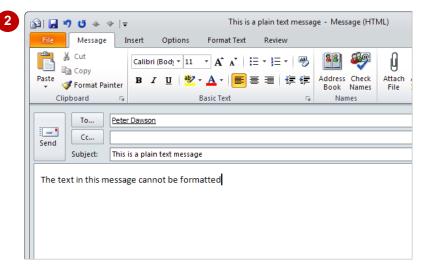
who uses a very basic internet mail application, creating the message using plain text format would be more appropriate than the default HTML format.

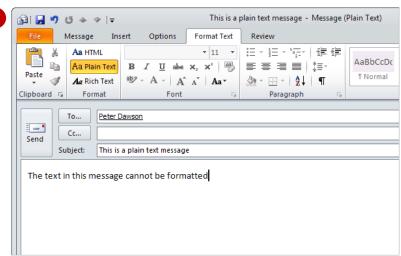
Try This Yourself:

- Continue using the previous file with this exercise, or open the file Watsonia_11.pst...
- Create a new message and send it to yourself
- Type This is a plain text message in Subject and then type The text in this message cannot be formatted in the body of the message
- Click on the Format Text tab in the ribbon, then click on Plain Text in the Format group

Notice that the tools in the Font, Paragraph and Styles groups are greyed out, indicating that they're not available. The tools in the Themes group of the Options tab are also unavailable...

Send the message





For Your Reference...

To change the format for a single message:

- 1. Create a new message
- 2. Click on **Plain Text** As in the **Format** group on the **Format Text** tab
- 3. Enter the text
- 4. Send the message

Handy to Know...

You can change the message format for all messages in the *Backstage*. Click on the *File* tab, click on *Options*, and then click on *Mail* to display the mail options. Click on the drop arrow for *Compose messages in this format* under *Compose messages*, select the desired format and click on [OK].

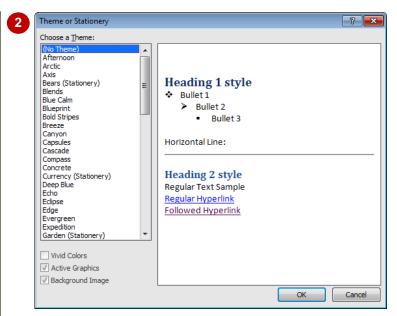
CHOOSING THEMES OR STATIONERY

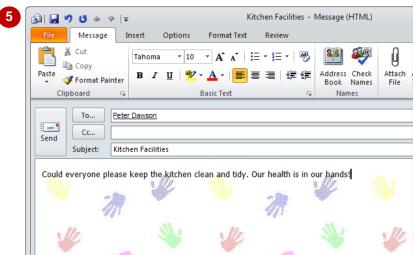
Outlook lets you compose new messages with special backgrounds known as **stationery**. This is similar to writing messages on letterhead or special note paper. **Themes** are a collection of

design elements, including background effects, fonts, text and graphics that provide a theme to your message. For example, the *winter* theme will give the impression of coldness to your messages.

Try This Yourself:

- Continue using the previous file with this exercise, or open the file Watsonia_11.pst...
- Click on the *File* tab, click on **[Options]**, and then click on *Mail* to display the mail options
- Click on [Stationery and Fonts] to open the Signatures and Stationery dialog box, then click on [Theme] to open the Theme or Stationery dialog box
- Click on the various *theme* and *stationery* options and watch how the preview changes
- 4 Click on *Hand Prints*(Stationery), then click on [OK] three times to return to the Inbox
- Create a new message, address it to yourself and type Could everyone please keep the kitchen clean and tidy. Our health is in our hands!
- 6 Send the message





For Your Reference...

To **choose** a **stationery/theme** for all messages:

- Click on the *File* tab, click on [Options] then click on *Mail*
- 2. Click on [Stationery and Fonts], then click on [Theme]
- 3. Select the desired option
- 4. Click on [OK] three times

Handy to Know...

 The format and styles used in some stationery and theme options can be a little overwhelming. Choose subtle options, such as ones with a picture or image down the side, or ones with a very subdued background pattern, rather than very busy or overstated designs.

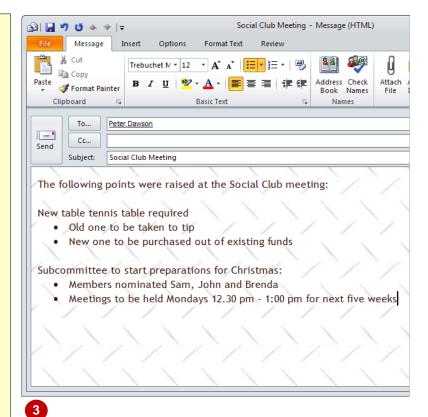
APPLYING A THEME OR STATIONERY TO A MESSAGE

As you create a new message, you can choose to apply a particular *theme* or *stationery* option to it. This gives you the flexibility to pick a design that best suits the proposed contents of your

email message. Be careful not to overuse this feature – your recipients may become overwhelmed!

Try This Yourself:

- Continue using the previous file with this exercise, or open the file Watsonia_11.pst...
- 1 Click on New Items in the New group and then select E-mail Message Using > More Stationery to open the Theme or Stationery dialog box
- Scroll down to and click on Industrial and then click on [OK] to open a new message with the theme applied
- Address the message to yourself, and then type a subject and message
- Send the message



For Your Reference...

To *apply* a *theme*/*stationery* to a single message:

- Click on New Items and select New
 E-mail Message Using > More Stationery
- 2. Select the desired theme or stationery
- 3. Click on [OK]
- 4. Compose and send the message

Handy to Know...

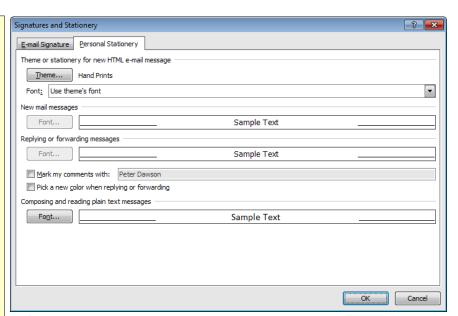
Once you have used a particular theme or stationery option in a new message by clicking on *New Items* and then selecting New E-mail Message Using > More Stationery, the theme or stationery option will appear at the top of the New E-mail Message Using submenu.

TURNING THEMES OR STATIONERY OFF

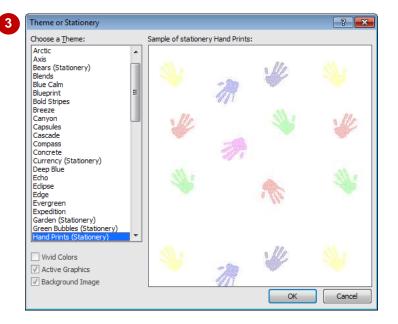
If you have selected to use a particular theme or stationery option for all messages, you can quickly turn off this feature if desired. Perhaps you may be tired of the look and feel of your messages and simply want to revert to the plain and simple default look. By selecting the default **no theme** option, you can always choose to apply a theme or stationery to specific messages only.

Continue using the previous file with this exercise, or open the file Watsonia_11.pst... Click on the File tab, click on [Options], and then click on Mail to display the mail options Click on [Stationery and Fonts] to open the Signatures and Stationery dialog box

- Click on [Theme] to open the *Theme or Stationery* dialog box
- Click on (No Theme) under Choose a Theme, then click on [OK] three times to return to the Inbox







For Your Reference...

To turn off themes or stationery:

- 1. Click on the *File* tab, click on **[Options]**, and then click on *Mail*
- 2. Click on [Stationery and Fonts]
- 3. Click on [Theme] and select (No Theme)
- 4. Click on [OK] three times

Handy to Know...

If you don't want to receive messages with a theme or stationery applied, you can choose to display all open messages in plain text.
 This will also remove all formatting from the message. To do this, select File > Options > Trust Centre > Trust Centre Settings > E-mail Security.

APPLYING A THEME

A *theme* is a set of unified design elements and colour schemes that you can use to create professional-looking messages. When you apply a theme to a message, Outlook customises the

background colours and graphics, body and heading styles, lists, horizontal lines, hyperlink colours and table border colours.

Try This Yourself:

Continue using the previous file with this exercise...

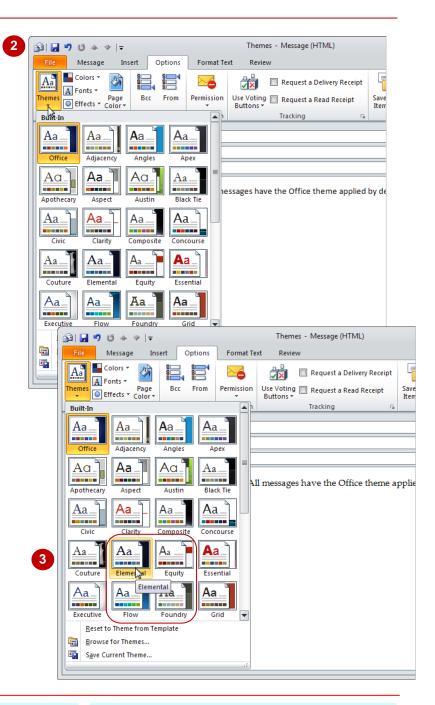
- Create a new message, address it to yourself, and type This message is looking at different themes. All messages have the Office theme applied by default.
- Click on the **Options** tab on the ribbon, then click on **Themes** group to open the **Themes** gallery

The default Office theme is currently applied to this message – notice that it is highlighted in orange. Look at the message and take note of the fonts and colours used with this theme...

Point to the various themes in the gallery to see them applied temporarily to the message in Live Preview

The Elemental theme has been applied temporarily in this example. Notice that the fonts used in the text and the size and colour of the fonts vary with the different themes...

4 Select the desired theme, and then send the message



For Your Reference...

To apply a theme to a message:

- 1. Create the message
- 2. Click on **Themes** in the **Themes** group on the **Options** tab
- 3. Click on the desired theme
- 4. Send the message

- You can only apply a theme to a message that has been created using the default HTML message format.
- You can see which theme is applied to a message by hovering over *Themes* . The theme name will appear in the tooltip.

SAVING A MESSAGE DRAFT

Sometimes it can take time to create an email message. Perhaps you are struggling for just the right words or you are waiting for additional information from another source – whatever the

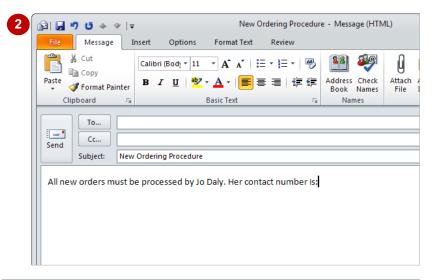
case, if you do not wish to complete and send an email message you can save it as a draft. Saved messages are placed in the *Drafts* folder from which they can be opened and worked upon later.

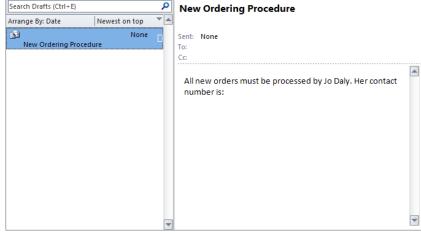
Try This Yourself:

- Continue using the previous file with this exercise, or open the file Watsonia_11.pst...
- 1 Create a new mail message and type New Ordering Procedure in Subject
- Type the following text in the body of the message

All new orders must be processed by Jo Daly. Her contact number is:

- Click on the *File* tab and click on [Save] to save the message
- Press Esc to close the message, then click on **Drafts** to see that the message has been saved in this folder







For Your Reference...

To save a message as a draft:

- 1. Compose the message
- 2. Click on the File tab and click on [Save]

- You can save a message in a folder other than the *Drafts* folder by clicking on *Save Sent Items To* in the *More Options* group on the *Options* tab and selecting *Other Folder*.
- You can save a copy of a message to disk by clicking on *File* and selecting *Save As*.

USING A SAVED MESSAGE

Messages that have been saved in the *Drafts* folder can be opened so that you can continue working on them. Draft messages are opened in the same way as opening any other messages –

typically this is done by double-clicking on the message.

New Ordering Procedure - Message (HTML) 🖆 🔛 🤟 (* 📤 😻 🔻 Try This Yourself: Message Options Format Text ∦ Cut - 11 - A A A | 1 = - 1 = - 1 = - 1 Continue using the 🖺 Сору previous file with this Address Check Book Names Attach File B / U | 炒 · A · | 重 ≣ ■ | 賃 賃 Format Painter exercise, or open the file Clipboard Names Watsonia_11.pst... To... Ensure that the **Drafts** Cc... Send folder is open Subject: New Ordering Procedure The New Ordering All new orders must be processed by Jo Daly. Her contact number is: Procedure message should be listed ... Double-click on the New **Ordering Procedure** message to open it in a message window Search Inbox (Ctrl+F) **New Ordering Procedure** Complete the message by Arrange By: Date Newest on top Peter Dawson addressing it to yourself Sent: Tue 31/08/2010 2:46 PM ■ Today and typing 555 1234 to Peter Dawson; Peter Dawson Peter Dawson 31/08/2010 the right of the colon (:), New Ordering Procedure All new orders must be processed by Jo Daly. Her contact then send the message Peter Dawson 31/08/2010 number is: 555 1234 Themes Peter Dawson 31/08/2010 Click on the Inbox to Social Club Meeting check that your new Peter Dawson 31/08/2010 Kitchen Facilities message has arrived Peter Dawson 31/08/2010 This is a plain text message

For Your Reference...

To use a saved message:

- 1. Click on **Drafts**
- 2. Double-click on the saved message
- 3. Complete and send the message

Handy to Know...

 You can save the message as often as you like. If you have no need to retain a saved message you can delete it from the *Drafts* folder.

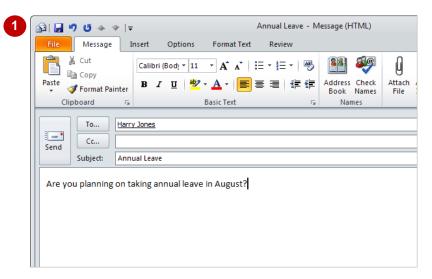
SENDING A VOTING MESSAGE

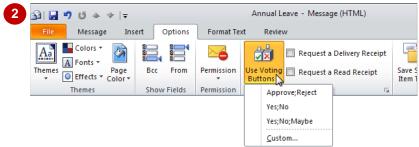
Messages are sometimes sent to solicit some sort of answer or response. For example, you might send a message asking whether or not your colleagues can attend a function. Outlook allows you to add **voting buttons** to a message. When the recipient receives the message they can simply click on the desired voting button and a reply will be automatically generated.

Try This Yourself:

- Continue using the previous file with this exercise, or open the file Watsonia_11.pst...
- 1 Create a new message, address it to a colleague, type Annual Leave in Subject, and type Are you planning on taking annual leave in August? in the message body
- Click on the *Options* tab, then click on *Use Voting Buttons* in the *Tracking* group to display the voting button options
- 3 Select **Yes;No** and then send the message

The Yes; No voting option will allow the recipients to reply either with a positive response, by voting Yes, or with a negative response, by voting No





For Your Reference...

To send a voting message:

- 1. Compose the message
- 2. Click on *Use Voting Buttons* in the *Tracking* group on the *Options* tab
- 3. Select the desired option
- 4. Send the message

Handy to Know...

 Outlook offers three sets of voting button options plus the ability to create your own custom voting button names. For example, you might create the custom voting buttons *Monday;Tuesday;Wednesday* to find out which of the three days best suits your colleagues for weekly staff meetings.

RESPONDING TO A VOTING MESSAGE

When someone sends you a message with **voting buttons** you are presented with several buttons to indicate how you wish to respond to the request from the sender. Outlook lets you

respond to it directly using the voting buttons in the *InfoBar* in the *Reading* pane or you can open the message and select the desired option on the *Vote* tool in the ribbon.

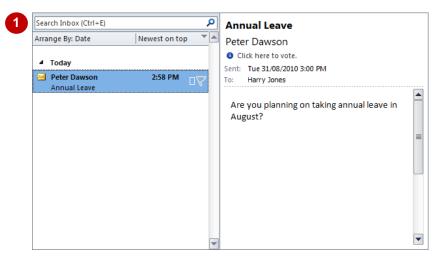
Try This Yourself:

- Continue using the previous file with this exercise, or open the file Watsonia_11.pst...
- Click on *Inbox* to see the voting message

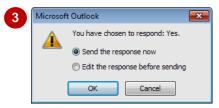
Notice that the information 'Click here to vote' appears in the InfoBar in the message header in the Reading pane...

- Click on the text *Click*here to vote to display
 the voting buttons
- Glick on Vote: Yes
 A dialog box listing the two response options will display...
- Ensure that **Send the** response now is selected, then click on [OK]

The InfoBar will indicate that you have responded to this voting message









For Your Reference...

To respond to a voting message:

- 1. Click on the *InfoBar* in the Reading pane
- 2. Select the desired voting option
- 3. Select **Send the response now** or **Edit the response before sending**
- 4. Click on [OK]

Handy to Know...

 As well as responding to a voting message by simply selecting the desired voting option, you can include a note for the sender along with your vote in the response message. To do this, select the voting option, click on *Edit* the response before sending, click on [OK], and then type and send the message.

TRACKING VOTING RESPONSES

As soon as one recipient has responded to your voting message, Outlook will automatically tabulate the results. To see the results you simply open the original message you sent with the

voting buttons – this message is usually found in the **Sent Items** folder – and then turn on the **Tracking** feature. If desired, you can also export the poll results to Excel for further manipulation.

Try This Yourself:

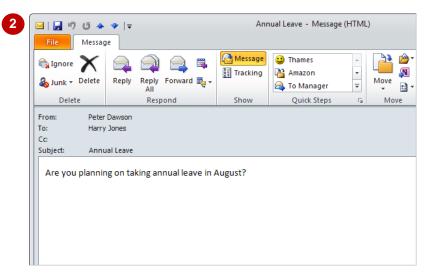
- Continue using the previous file with this exercise...
- Click on *Inbox* you should have received a message with the subject *Yes: Annual Leave*

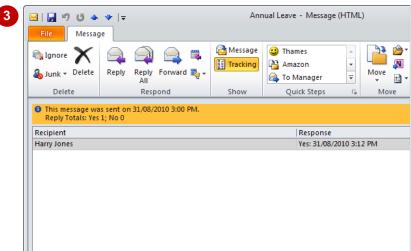
Looking at messages in the Inbox to check the recipients' responses is fine if you'd only sent the message to a few people. But if you sent it to more, it is easier to see a summary of the responses using the Tracking feature...

Click on **Sent Items** and then double-click on the **Annual Leave** message to open it in a message window

The message should appear in Sent Items with the symbol indicating that the Tracking feature has been enabled...

- Click on *Tracking* in the *Show* group to display a summary of the responses to your vote
- 4 Press Esc to close the message





Tip: You can set Outlook to automatically delete all blank responses – that is, messages that contain no comments from the sender other than their vote. To do this click on the File tab, click on [Options] and then click on Mail. Tick Update tracking information, and then delete responses that don't contain comments under Tracking.

For Your Reference...

To review the voting responses:

- 1. Click on Sent Items
- 2. Double-click on the original voting message
- 3. Click on *Tracking* III in the *Show* group

Handy to Know...

You can export poll responses to Excel. To do this, open the original message with the voting buttons and click on *Tracking* in the *Show* group. Select the desired rows, press ctrl + C, open Excel, click in a cell and press ctrl + V to paste the data.

SENDING AUTOMATIC RESPONSES

You can set up Outlook to automatically respond to people who send you messages. This is ideal when you are out of your office for some time, such as being away on annual leave. Using the **Automatic Reply** feature you could inform people the dates of when you're away, provide an alternative contact or simply suggest that there may be a delay before you respond. It's your choice.

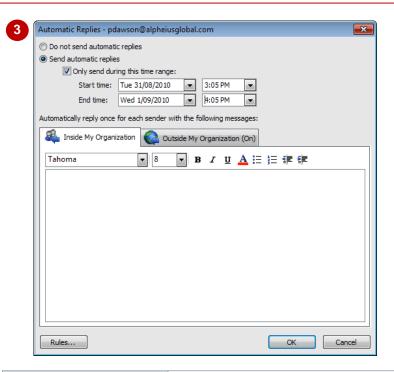
Try This Yourself: Continue using the previous file with this exercise... Click on the File tab, then click on [Automatic Replies] to open the Automatic Replies dialog box Click on Send automatic replies Tick Only send during this time range and select a period of one hour from now

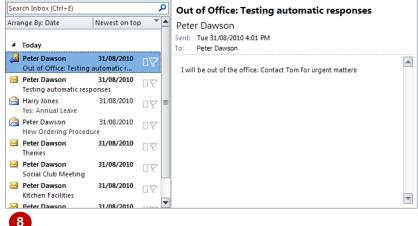
Contact Tom for urgent matters

Click on the *Outside My Organisation* tab, then

Type in the message body I will be out of the office.

- Organisation tab, then select Auto-reply to people outside my organisation and Anyone outside my organisation
- Type I am out of the office in the text box, and then click on [OK]
- Press then create and send a message to yourself
- 8 Click in the Inbox to see the automatic response
- 9 Click on [Turn Off] in the orange Infobar to turn off Automatic replies





For Your Reference...

To set up an automatic response message:

- Click on the *File* tab, then click on [Automatic Replies]
- 2. Click on **Send automatic replies** and specify a timeframe
- 3. Type the text for internal and external messages

- You must have a Microsoft Exchange Server account for automatic replies to work.
- Outlook will respond only once for each sender.

Notes: