Email Management

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Reduce email interruptions

Set your calendar as the default view

1. Open Outlook
2. Go to File > Options
3. Select ‘Advanced’
4. Under ‘Outlook start and exit’, click ‘browse’

5. Select Calendar instead of inbox, then click OK.
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Switch off email notifications

1. Open Outlook
2. Go to File > Options
3. Select ‘Mail’
4. Under ‘Message arrival’, deselect the options available

5. Click OK to save.
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Handle each email only once

**Delete**
- read it and move on. No action required

**Deal with it**
- If required action takes two mins or less, follow up immediately, then delete or file.
- If required action will take long than 2 minutes, then:

**Decide**
- **When** it needs to be actioned (create a calendar item)
- **Where** it needs to be filed (move to folder)
- **Wait** on further action (add to watch list)

**Delegate**
- If action is required from another party, forward and file in ‘watch list’

Create a calendar item from an email
1. Click on the email to select it.
2. Right click on the message and drag the message to your calendar or tasks.
3. Choose to ‘copy/move here as appointment with text/attachment’.
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4. Adjust the date and time (if necessary) and click ‘Save and Close’

5. ALTERNATELY, you can use keyboard shortcuts to copy (ctrl C) the message and paste (ctrl V) into the correct time and date in your schedule.

To set up a rule
1. Right click on the message for which you’d like to create a rule
2. Go to Rules > Create Rule
3. Set up the rule parameters (click select folder to choose destination folder)
4. Click OK

To view/edit rules
1. In the top menu bar, click on the drop down arrow under ‘Rules’
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2. Select ‘Manage Rules & Alerts’
3. Edit, delete, or add new rules here.
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Mailbox too full?

Delete/archive large items
1. In your mailbox, click on ‘Arrange by’.

2. Select to arrange by ‘Size’
3. In the column to the right of ‘Arrange by’, click to display ‘Largest on top’

Save an attachment to your computer
1. Click on the email to select it
2. Right click on the attachment and select ‘Save as’
3. Choose the location and click Save
4. Delete the original email

Save an email to your computer
1. Double click on the email to open it in a new window.
2. Go to File > Save as
3. Save as file type ‘Outlook Message Format – Unicode’ to the desired destination. **NOTE: emails will save to your D drive if you do not change the file location, which makes them very difficult to find.

Change your AutoArchive settings
1. Open Outlook
2. Go to File > Options
3. Select ‘Advanced’
4. Under ‘AutoArchive’, click ‘AutoArchive Settings’
5. Change settings as desired, then click OK.

Send hyperlinks rather than attachments
If a document is saved centrally on the network share drive, you can send a link rather than attach it.

1. Compose your email as per normal.
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2. In the top menu ribbon, select the ‘Insert’ tab, then click ‘Hyperlink’.

3. Choose to link to ‘Existing File or Webpage’ and then browse to the location of the document (make sure you choose a location on the network drive that is accessible to everyone – NOT your desktop or personal drive).

4. Select the document, and the hyperlink will appear in the ‘Address’ field. If you would like to change the anchor text, edit in the ‘Text to display’ field (i.e. rather than displaying the long hyperlink in your email, it could read ‘Click here’ or the document title).

5. Click OK, and send.

Further Information