



A simple email filing system

TN53 Training Notes series: Administration

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This is a simple system for keeping your emails filed well, your Inbox under control and your Sent box empty. It is designed to be easy to operate and to help you feel good.

This is written for clergy, administrators and other church workers, often working from home or a church base rather than a commercial office which is more likely to have its own systems. It assumes a PC and the use of Microsoft Outlook.

To keep it simple it assumes that your emails and their replies fit easily into disjoint collections and so can be filed under a number of independent headings. If one email covers two different topics, Ctrl C then Ctrl V the listing of it and you have two copies.

It is only one way of keeping your emails under control. There are others, for example the use of Outlook rules and categories. For this, go to FILE then 'Rules and Alerts...'.

Principles

- 1 To use folders (just as you probably do in Word) for filing both 'received' and 'sent' emails together (just as you do for paper in a filing cabinet). Setting up folders is a standard technique, but keeping 'sent' emails in the same folders as 'received' ones is not so common. However it makes good sense.
- 2 To keep your Inbox only for emails you have not yet dealt with, or only for emails you have not yet read (two different systems are offered – choose the better one for you). This means your Inbox will rarely have more than, say, one screen's worth in it and will, whenever possible, be empty.

- 3 To keep your Sent box empty all the time, and to clear your Deleted Items folder regularly.

Setting the system up

1 Plan the choice and structure of your folders

Think of all the emails you send and receive and seek to identify no more than ten broad areas that they fall into. These can easily be amended so it may be better to come up with something quickly and then adjust later if it can be improved. You will probably find it helpful to match your document folders system, assuming you have one. A Baptist Minister might have something like Pastoral Team, Deacons, Members, Projects, External, Reference, Personal.

Split these down into sub-folders if this would be helpful. So Members might split into Joining/leaving, Pastoral, Administration, Meetings. But a more helpful division might just as easily be A-D, E-K, L-R and S-Z. For the Deacons folder, you may need to have individual names as the sub-folders. The key point is: what is the best set of divisions so you can *find* emails easily?

You may also like to create a Pending folder for emails for which you are awaiting an answer. Nothing lives here permanently.

If you are not sure of the sub-folders, leave them just as main folders for a month or two. You may then get a better feel for what will work best.

2 Create the folders and sub-folders (in Outlook)

To create a folder, select the FOLDER tab, click 'New folder', then name the folder and place it by clicking 'Personal Folders' at the top of the list shown below, 'OK'.

To create a sub-folder do exactly the same but this time you place it in the named folder of which it is to be a sub-division.

Alternatively you can simply right click on 'Personal folders' or the appropriate sub-folder in the left-hand pane, choose 'New Folder...', and name it in the box.*

The folders will now appear in alphabetical order in the left-hand pane. If you want them to appear in a more logical order, drag them to the place in the list which makes sense for you. Keep them separate from the standard Outlook folders (Inbox, Sent, Deleted, etc.). Add these three to a Favorites list by right clicking the file name and then 'Show in Favorites'.

If you have created sub-folders you want to ensure that the full list of folders appears in the left-hand pane. If all the sub-folders show the list may run off the bottom of the pane. So keep the sub-folders closed to view by clicking the black arrowhead beside the main folder names whenever you are not using those particular sub-folders.

*Note that if using Windows Mail, you create a new folder by going 'File', 'Folder', 'New', etc.

3 Add a 'To' column in each folder

The column headings for each folder are designed for incoming emails, but on this system you are going to place outgoing emails there too. The Sent box has a 'To' column, but the folders you have created do not. So you need to add one as follows:

Go to the folder in question.
VIEW tab', 'Add columns'.
Then scroll down (if necessary) the left hand list to 'To' and click it.
Now click 'Add'.
Drag it so it follows 'From' in the order. Click 'OK'.*

Now you have a 'To' column for the folder and it follows the 'From' column which makes sense. You may want to readjust the column widths by left clicking on the dividing lines between the column titles and shifting them left or right.

You may prefer this alternative:

Go to the folder in question.
Right click anywhere on its heading bar.
Select 'Field Chooser'.
Scroll down if necessary to 'To' on the 'Frequently-used fields'.
Drag and drop 'To' to the place where you want it on the header bar.

If you already have lots of folders it is tedious to follow the above procedure for every one. All you need to do is to go to the folder where you have created a 'To' column, on the View tab click 'Change View', then 'Apply Current View to Other Mail Folders', tick the folders that appear in the Apply View dialogue box, tick 'Apply view to subfolders', then 'OK'. Done!

*Note that if using Windows Mail, you do this by going 'Views', 'Columns', etc.

4 **Create sub-folders for your Inbox** (optional)

If you do not have a huge amount of emails, or if you want to use your Inbox to hold all emails until dealt with, this step is unnecessary. But you may wish to move emails out of the main Inbox the moment you have read them, but leave them ready for action somewhere else. In this case create sub-folders of the Inbox such as: Urgent, Soon, Info only. Right click on any one, then click 'Show in Favorites' to keep it in view.

5 **Drag and drop existing emails to their correct folders**

The system is now ready. If you have many emails in your Inbox at the moment, you may want to drag and drop them all into a special Inbox sub-folder called 'Archive' so that you can start with an empty Inbox. You may want to move all your Sent box emails to their correct folders. But this will take time so, again, you may prefer to start the system from now but place all the Sent emails up until now in a special sub-folder of Sent called 'Archive'.

Working the system

1 **Quickly check your Inbox**

Open each email and scan it through. If it can be deleted, do this at once. If you need to keep it but no further action is required, drag and drop it in its appropriate folder in the left-hand pane. If all it needs is a quick answer taking a few seconds, do it now. Then drag and drop it to its correct folder or delete it if you don't need to keep it. If it needs thought and/or a longer answer, leave it where it is for the moment and come back to it at a better time.

This means your Inbox now only has read emails (ie no longer bold) which you need to deal with in due course. Everything else has been sorted.

Alternative system

As above but with the emails you still have to deal with, drag and drop them to their appropriate Inbox sub-folders. They are still in the Inbox, but the main Inbox is empty.

2 Deal with remaining emails at appropriate times

When you have time, deal with each email left in the Inbox (and/or its sub-folders). They will be in date order if you have clicked the date column as your default. When you have written your reply and clicked 'Send', drag and drop the incoming email to its correct folder. Aim to have your Inbox empty as often as you can. You will feel so much better for it.

3 Deal with 'sent' emails the moment you send them

Whenever you click 'Send/Receive', go to the Sent box and drag and drop each email there to its correct folder, or delete them if you do not need to keep them. You are then filing all your emails in both directions in the same place, so at any time you can open the sub-folder and see everything in both directions in date order without any need to search.

But it is usually not necessary to keep both 'received' and 'sent' emails if the 'sent' one includes the text of the 'received' one. So delete the 'received' email (unless it has attachments) and file the 'sent' one. Some people of course leave the whole thread in but this means large emails.

If you are sending an email requiring a reply, file it in your Pending folder. On this system you empty the Sent box every time you send emails.*

Keep checking the Pending folder and delete items once the reply comes in. If anything is more than, say, a week old, you can chase it up. At any time the only emails in the Pending folder are those you are holding pending a reply.

Permanently delete your Deleted Items box from time to time. It is wise to leave the past month's items there and manually block and delete all the rest. It's a great feeling!

* Note that you can set Outlook to send your reply to the same folder as the email you are replying to by going FILE, 'Options', 'Mail', scroll down to 'Save messages' and check the box that says 'When replying to a message not in the Inbox.....'.

4 Re-file or delete old emails

Some of your folders may no longer be current, in which case drag and drop them to the Archive section in the left hand pane. Some of your emails may be old and do not need to be kept – so delete blocks of emails if this is so. Or use the automatic archiving system. Never let your Personal Folders get too many or too crowded. Of course the computer can search and find things for you, but it is still better not to keep too much and feel you are coping with what you have.

You also need a proper back-up system for your emails if they matter to you (for both Personal and Archive Folders) unless you use a cloud system like Office 365 or gmail – but that is another topic. Do a special back-up to an external disk or drive once a year,

label it clearly and keep it just in case you need anything once you have deleted blocks of your current emails.

Check your Junk box regularly in case genuine emails are there. If not, right click on the folder name and click 'Empty Folder – Yes'. That keeps nasties out of the way.

This is only one way to file emails, but it does enable you to be in control. Your Inbox will only have one screen at most waiting to be dealt with and will quite often be empty. Your Sent box is always empty. Your Deleted Items folder has no more than one month's worth. You are deleting every email you do not need and keeping those you do need together in sensible groupings which are easily viewed.

Now go and party!

These notes are available at <https://www.john-truscott.co.uk/Resources/Training-Notes-index> then TN53. See also Article A11, *Become a better emailer* plus Training Notes TN46, *A beginner's guide to IT security*, TN99, *Social media+ guidelines*, and TN143, *Protect your church from scams*. For 'out-of-office' emails, see TN105, *Recording a voicemail message*.

John's resources are marked for filing categories of Leadership, Management, Structures, Planning, Communication and Administration. File TN53 under Administration (with a link to Communication).

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