

Managing Email and Electronic Filing

Managing email

Different email programmes give you different tools to manage your email. It will be helpful if you can spend a bit of time experimenting with the email programme you use, and find out what works for you. Don't worry- even if you delete an email by accident it will still show in your 'Deleted emails' folder or 'Recycle bin' or 'Trash' for a while, so you have a second chance to find and retrieve it.

The two most common types of email programme are **Outlook** (including outlook.com and Hotmail accounts) and **Gmail** (sometimes called googlemail). Most other programmes are similar to one of these two, but sometimes the names used for different functions are different- for example the place where deleted emails go could be called the Bin, Trash, Trash can, Recycle bin, or Deleted items. Spam can also be called Junk. If you struggle please contact the Circuit office and we'll try to help.

Apple programmes can be a little different but most of the same principles apply.

Inbox

Your inbox can be used for a kind of 'triage' to help you identify what is urgent or important

Once you have read an email (or assessed it without reading it, for example if you know it's a newsletter you don't want to read at the moment) you should **file** it.

If it needs action or a reply and you are not going to do this immediately, mark the email in some way- with a **star** or **flag** and leave it in your inbox, or put it in a folder marked 'Action required' or similar. Make sure you file the email once you have completed the action.

Otherwise, file the email in a folder (Outlook) or label it and archive (Gmail). See below for details.

If you are sure you don't need to retain the email- that it contains no information you might need at a later stage- you can delete it, but so long as your filing system is working you don't need to worry about deleting as many emails as you can still find the ones you want.

Filing email

Most email programmes will allow you to create a filing system to sort your email. Most (e.g. Outlook, Hotmail) use **folders**. Folders can have subfolders inside them. For example, you might have a folder called "Circuit" with subfolders for "Circuit Council" and "Circuit Stewards".

Create a folder (see link below for instructions on how to do this) and then drag and drop your emails into it from the Inbox. It's like taking a piece of paper from your desk in-tray and putting it in a file in a filing cabinet. An email can only be in one folder (or one subfolder) at a time.

The folders will show up at the side of your screen. Click on the folder to show all the emails in that folder.

Creating folders: <https://support.office.com/en-us/article/create-a-folder-in-outlook-3d3120d4-3c0e-4fef-b396-89b68324eba6>
<https://support.office.com/en-us/article/video-organize-email-by-using-folders-0616c259-4bc1-4f35-807d-61eb59ac79c1>

Gmail uses **labels** instead of folders. Labels work in a similar way. Each label can have other 'sub labels' in the same way a folder can have sub folders. When you create a new label (see below for help) you can choose if the label has a 'parent' label. Leave this blank if you want the label to be the main label.

For example, the "Circuit Council" and "Circuit stewards" labels would have "Circuit" as a parent label.

Labels also have the benefit that you can apply multiple labels to one email. This can be helpful if the email is about more than one subject, for example it contains both information about the next stewards meeting and an update on a property project.

Once you have created your labels, you can drag and drop the email to that label, or with the email open, click on the label icon at the top to choose a label, then archive the email to remove it from the inbox. The labels will show up at the side of your screen- you can change the colours so you can quickly spot the label you want. Click on the label to see all emails with that label.

Creating labels:

<https://support.google.com/mail/answer/118708?co=GENIE.Platform%3DDesktop&hl=en>

Suggested folders/ labels:

- Action required- for emails that you need to reply to or action
- One for each committee or group you sit on- e.g. Church/ Circuit Council, Stewards, Property Committee etc.
- One for each church you are in regular contact with (if you are dealing with multiple churches across the circuit)
- One for Circuit news/ other regular important notices
- One for Newsletters you want to keep but don't need to read urgently
- Reference: emails you will need to refer to frequently or that you need to keep to hand.

Obviously this just refers to circuit or church related emails. If you use the same account for personal emails, you will probably want to have other folders for communications with family, shopping offers, social groups etc. Or if you find you're losing important personal emails in the sea of church related email you might want to consider creating a separate account just for church emails.

You might want to create a folder or label for emails containing **links for zoom** (or other online conferencing) meetings that have not yet taken place. That will help you find them quickly when the meeting is due to start.

You will probably find it helpful to delete the email or file it elsewhere once the meeting is over, to keep the number of emails in the folder small and make it easier to find the most recent links.

This makes looking for an email easier as you will only need to look in one folder (and perhaps your inbox) rather than all your emails.

You can use the **'search'** function to search either all your emails, or just one folder.

<https://support.office.com/en-us/article/video-search-and-filter-email-3e32b06d-a2d9-4a66-922f-78b77c41b97f>

Keeping on top of things

It's helpful if you can occasionally spend some time just sorting and filing your emails. Every so often you might want to delete all those emails you no longer need- perhaps you could delete everything older than a year, although in that case you might want to create a 'Reference' folder or label for anything you really do need to keep. Or you could delete all emails relating to a meeting once the minutes have come out, and just keep the minutes and papers.

You should also check your **Junk** or **Spam** folder occasionally. These work by recognising emails that look like junk mail, but occasionally emails you do want can get caught and sent to spam as well, particularly if they are sent to a large mailing list.

To try to avoid this, add the email address they are sent from to your address book, and move the emails from spam to another folder rather than deleting them. Your email programme should eventually learn that this isn't a spam sender. Gmail also has a 'not spam' or 'not junk' button you can click.

You can also use **filters** or **automatic rules** to keep your inbox clear. If you get emails that you want to keep but not to show up in your inbox (for example a regular newsletter or shopping offers from a particular store) you can set these to go straight to a folder or label and not show up in your inbox. See the links for how to do this.

Outlook: <https://support.office.com/en-us/article/Use-inbox-rules-in-Outlook-com-4b094371-a5d7-49bd-8b1b-4e4896a7cc5d>

Gmail: <https://support.google.com/mail/answer/6579?hl=en-GB>

Experiment and customise your folders or labels to see what most helps you.

You might want to use the same categorisation as you do for computer or paper files, so that you can more easily remember where you filed things.

Filing on your computer

Downloads

Find out where files that you have downloaded are kept. Some web browsers and email programmes ask you where you would like to save each download, but others automatically send everything to a particular folder, often (unsurprisingly) the **Downloads** folder. You might want to create a shortcut to the Downloads folder on your desktop, or at least know how to get to it. Try to keep the number of files in Downloads small by moving files to the appropriate folder.

Saving an email to your computer

If you want to save an email to your computer, you can save it as a pdf (portable document format) document.

- Open the email
- Go to 'Print'
- Choose 'Save to pdf' or 'Print to pdf' and then 'Print'

The file will download and either save to your default downloads folder or open. You can then move or save it to the folder you want to put it in.

Filing

Create **folders** on your computer to keep documents in. You might want:

- One for each committee or group you sit on- e.g. Church/ Circuit Council, Stewards, Property Committee etc.
- One for each church you are in regular contact with (if you are dealing with multiple churches across the circuit)
- One for expenses claims
- Reference: emails you will need to refer to frequently or that you need to keep to hand.

You can also create folders within folders so you can have, for example, "Minutes 2019-20" as a subfolder of "Church Council". Again this makes it easier to find documents quickly. You will probably find it helpful to have similarly names and categories for folders within your email and for documents on your computer.

You can then drag and drop documents from their existing locations to the new folder, or open the document, click on "Save as" and then choose the new folder from the list of locations.

Back up

You should back up your files either using a backup programme or by copying them to a portable hard drive, CD or USB memory stick. Try to do this regularly so no information is lost if your computer breaks down- monthly at least.

You could also consider using a programme like OneDrive, GDrive or Dropbox that saves a copy of your files online and backs them up automatically. Many of these are free, at least for a limited amount of storage, and have the added advantage that you can access your files from your phone or another device.

However you should always regularly back up offline (to portable hard drive, CD or memory stick) too.

Search

If you can't find the document you are looking for but can remember roughly what it was called, you can 'search' your computer using those words to try to find it. You can also search within a folder to find documents within it.