

EMAIL FILING TOOLKIT

OBJECTIVE:

To decrease paper usage by eliminating the practice of printing out emails instead of saving and filing them electronically.

BACKGROUND INFORMATION:

Any amount of savings in paper usage, however small, will have a large cumulative effect on the total savings at PHSA. One area where savings can be achieved with relative ease is through filing documents and emails electronically, instead of printing them out on paper.

PHSA consumes 44 million sheets of paper a year. According to the EPA the average office worker uses 10,000 sheets of paper annually.

PHSA's paper usage equals:

- 5,664 trees
- enough water to fill 7 Olympic sized swimming pools
- enough solid waste to fill 15 garbage trucks

BARRIERS:

1. A lack of understanding about the importance of reducing paper.
2. The perceived cost (financial and environmental) of printing a single sheet is minimal. However, for the entire organization the costs are huge.
3. Lack of training and knowledge on how to properly store and easily retrieve documents electronically. Staff under time constraints often feel they don't have time to learn how to e-file.
4. There are various existing software systems that automatically provide paper reports or necessitate paper backups.
5. Some people do not trust electronic systems.
6. Some people have difficulty reading on the screen or print by default/habit.

BENEFITS:

- Documents are easily searchable and can be found quickly.
- Servers are backed up and archived often, meaning documents will never be lost.
- More space in the work area and less clutter.
- Less paper = reduced fire hazard and easier cleaning and infection control.
- With digital documents staff can access files from other sites or from home.

STEPS:

Determine the best way to approach the issue with your department. Should you speak with your supervisor first and get her/him involved? Should you bring it up at a staff meeting, or send out an email explaining electronic filing and offer your services to help set it up? (This will be different for different work areas.)

As a G+L, you can use the instructions below to help colleagues learn how to file their emails electronically. It is up to you to decide how you would like to disseminate this information.

Step 1

If you have not already done so, you will need to develop a filing system in Outlook to organize your files and to make retrieval easier. This is similar to developing a proper paper filing system.

Create folders with logical names that accurately describe the contents of each folder. You need to develop a system that works for you. Try to develop broad first level categories so you can easily group emails, such as:

- Document type such as: LETTERS, MEMOS, REPORTS, etc.
- Project Name: GREEN+LEADERS, PAPER REDUCTION, WASTE, etc.
- Date: 2009, 2010 or MARCH, APRIL etc.

To create a new file where emails can be stored and retrieved with ease:

- Within Outlook, in the upper left corner of the screen and directly under the “file” button, there is an icon with the word “new” on it.
- Click the little black triangle next to the word “new”.
- Click on “folder” which should be the third item on the drop-down menu.
- Outlook will now ask you if you would like to create a shortcut to this folder, if you choose to create a shortcut an icon will be placed on the “my shortcuts” bar to the left of the window.

Step 2

There are two ways to file emails:

1. When an email is in the Outlook Inbox, right-click on the subject of the email. A small menu will pop up. The second to last item in this menu should be “move to folder”. Select this and another box will appear with the folder choices for storage. Select the folder you want to move the email into.
2. From the Outlook Inbox click once on the subject of the email to select it. In the menu bar at the top there is an icon for “Move to Folder” This looks like a white sheet of paper with a small arrow pointing into a yellow file folder. (Hint: It should be near the print button.) Select the folder you’d like to move the email into.
3. Organizing your email files should be done in a similar manner to organizing your individual electronic storage on the server.

Step 3

Retrieving messages from the folders:

- If you chose to create a shortcut to the folder that you created in step 1, clicking on that folder icon will bring up the folder and its contents.
- Otherwise in the “folder list” window to the right of “my shortcuts” is a list of all the folders in your Outlook.
- Click on the desired folder.

Step 4

Auto Archiving:

Archiving removes email messages from your mailbox and automatically stores them in folders that have the same names as the folders in your inbox. There are many benefits to archiving: efficient record keeping, storage space, and a more organized mailbox. Messages in your archive do not count towards your Outlook size limit so it is a good way to save messages for long-term storage.

To set or change **Auto Archive** settings, click **Options** on the **Tools** menu, click the **Other** tab, and click **Auto Archive**.

By default, Auto Archive is disabled. To enable AutoArchive, simply click on the **Run Auto Archive every XX days** box.

By default Auto Archive is set to run every **30 days**. You can increase or decrease the frequency of the number of days you want Auto Archive to run by clicking on the up and down arrows.

You can also customize Auto Archiving to your specific needs and indicate exactly from what point you want old emails archived. You can increase or decrease that number once again by clicking on the up or down arrow.

By default, Auto Archive will save your backed up emails to a **.PST file** and save it locally on your computer in C:\Documents and Settings*username*\Local Settings\Application Data\Microsoft\Outlook\archive.pst. You have the option to change the location of where the file will be saved: to do this, simply click on browse and select a desired location or folder.

Once you have configured your archiving settings, click on “**Apply these settings to all folders now**”. ***Note***: In Office XP, the archive settings will apply to all your general folders, i.e. Inbox, sent items and deleted items, but will not apply to any subfolders you might have created under the root of these folders. To enable archive settings for any subfolder, right-click on the folder and choose **Properties**, then go to the **Auto Archive** tab.

Step 5

Periodically you will need to clean out your electronic filing system. Move old documents to the archive folder and delete unneeded documents. If you have trouble setting aside time to do this, it can help to set a recurring meeting for yourself in Outlook as time for you to clean up your files.

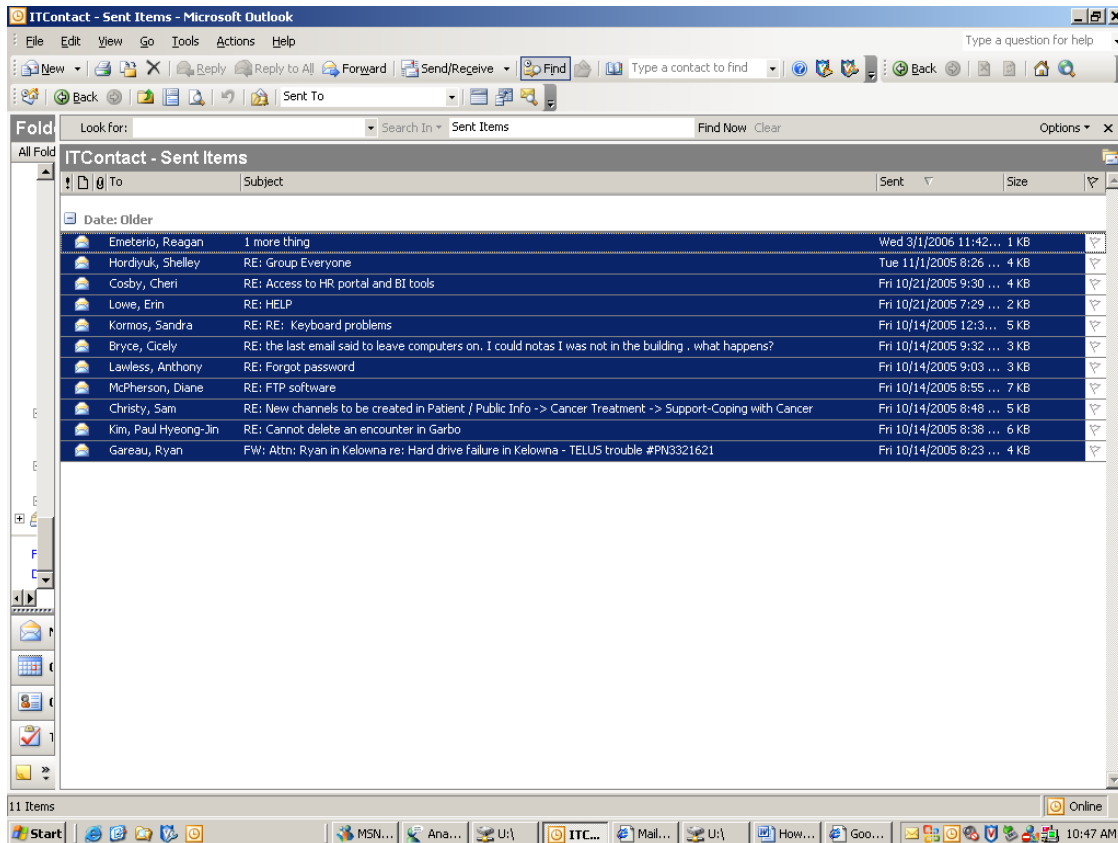
TIPS ON HOW TO MAINTAIN YOUR OUTLOOK MAILBOX

Tip 1: Deleting content in your sent and deleted items folders

Often one of the problems PHSA users encounter is reaching their size limit or mailbox quota in Outlook. (*100,000KB is the default limit.*)

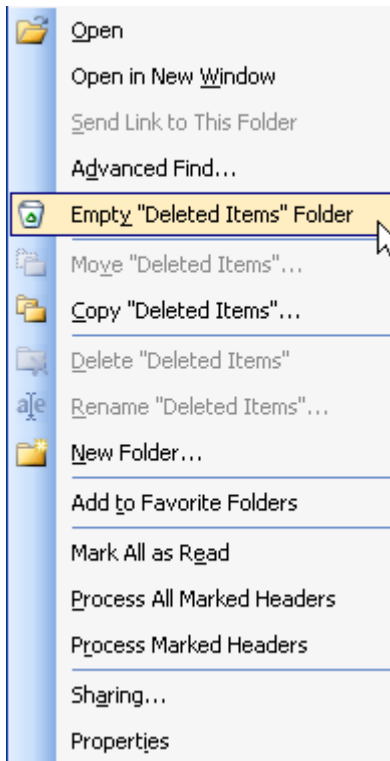
Each time an email is deleted from your inbox, it goes into the **Deleted Items** folder. Likewise, every time an email is sent from your mailbox, a copy of that email resides in the **Sent** folder. Over time these folders can grow quickly and need to be cleaned or emptied to free up space.

In order to quickly delete *all* the items in your Sent folder, navigate to the sent folder and hold down the **Ctrl + A** keys together. This step will highlight all the sent items. Once highlighted, simply hit the **Delete** key on your keyboard. This will send all the items to the Deleted Items folder.



Once you have deleted the content of your Sent folder, navigate yourself to the **Deleted Items** folder

To delete all the content in your **Delete Items** folder, simply click on the **Tools** menu (on the Outlook tool bar) and click on **Empty "Deleted Items" Folder**.

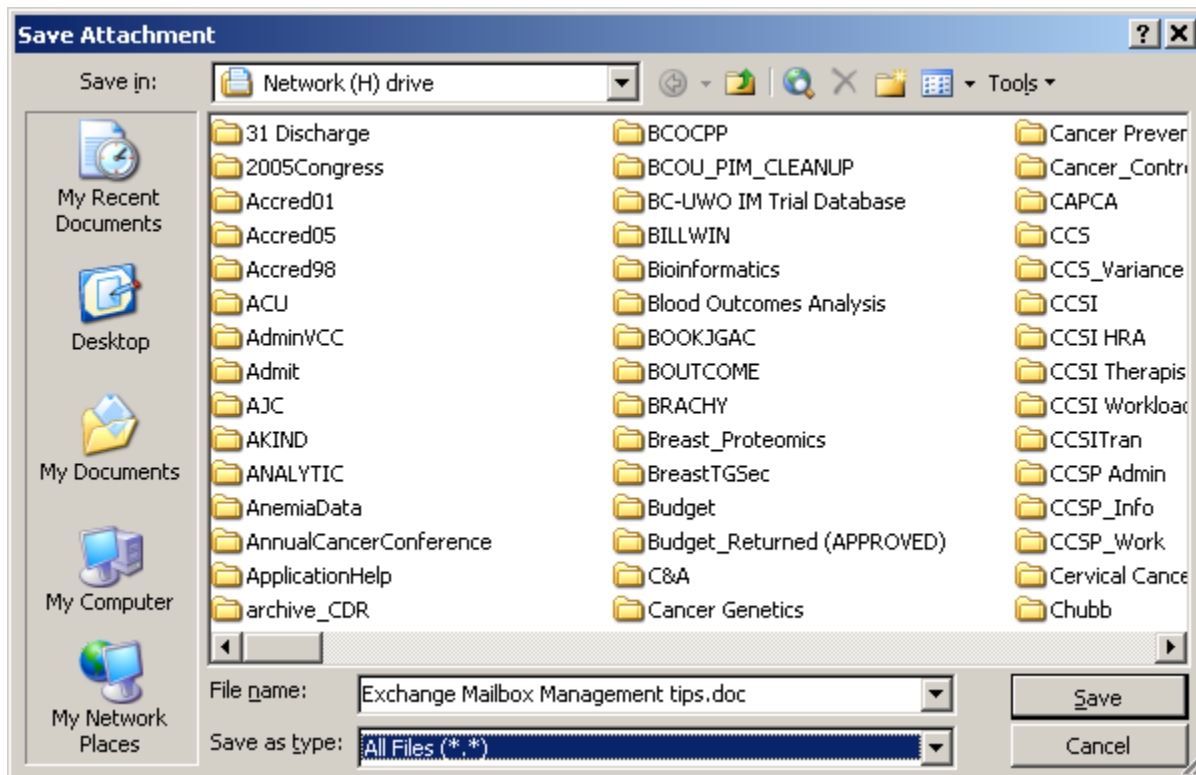


Tip 2: Saving / Filing emails with attachments

Often emails will arrive in your inbox with files attached to them. The files you receive can vary in size and depending on the number you receive, they can use up a significant amount of available space in your mailbox.

It is good practice once you receive an attached document to save it to your home drive or to a network folder, rather than saving the email.

To save the attachment, simply right click on the file and select **Save As** - The *Save Attachment* box will open and allow you to select where you want to save your document.



Tip 3: Clearing the Cache Files (Temporary Files)

- 1) Click on "Tools" on the menu, and click on "Options" below.
- 2) Go to the "Other" tab at the top of the window and click on the "Advanced Options" button.
- 3) Click on the "Custom Forms" button, then "Manage Forms", and finally "Clear Forms Cache" button.
- 4) Once completed above, close and restart Outlook.

For additional assistance with your Outlook mailbox, please contact the PHSA Service Desk at 604-675-4299 or 1-888-675-4299 (toll-free outside Greater Vancouver) or email itcontact@phsa.ca.

EVALUATION

Prior to initiating the tool, try to determine how much paper your department is using. This data can be found by asking the appropriate person in your department how much paper they buy, and how often. As well try to get a general sense of how much storage space paper is taking up in your workplace and how much time people spend working with paper.

Before January, review paper usage and the space requirements for paper storage and quantify what improvements have been made.

Also figure out how many people are now using the tool or have improved their e-filing?

How much paper has been saved?

As well, try to get a qualitative indication of the tool. What are people's personal reactions to using less paper. Do they find it makes their work life easier? Can they find documents more easily? How do they like the program? What can be improved in the future?