

# Paperless Office/Managing E-mail/Survivor Tips

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AHS Computing  
University of Waterloo

# According to Lowell!

- Don't Print!!!
- Read e-mail... then delete it!
- Thanks for coming today...
- Seriously though...

# Overview

- How much paper do we really use?
- Tips on avoiding printing
- Tips on how to print more effectively
- E-mail - Setting up a system that works for you
- Dealing with the volume

# The 3 Rs







- Reduce
  - Reuse
  - Recycle
- 
- It is the first one and the easiest to control!



# How Important are the 3 Rs?

- Well it is no longer an immediate matter of life or death, but at one time it very well could have been

*Every scrap of paper is wanted for salvage now!*

	<b>1</b> Cereal Carton	makes	<b>1</b> cut-out target	
	<b>6</b> Old Bills	make	<b>1</b> washer for a shell	
	<b>1</b> Daily Newspaper	makes	<b>3</b> 25-pdr. shell cups	

Old newspapers, magazines, letters, wallpaper oddments and greeting cards—in fact *all* waste paper and cardboard, clean or soiled, is urgently needed.

Remove pins, clips, fasteners, etc. before putting your waste paper out in a separate bundle for the Salvage Collector when he calls.

**PUT OUT MORE PAPER FOR MUNITIONS**

Rags, Bones and Rubber are urgently wanted, too!

# A Modern Take...



*To be or not to be, you decide.*

Just one ton of paper can save up to 17 trees.  
But did you know that Miami-Dade County employees go through more than 7 tons of paper a day?  
That's over 30,000 trees a year - a small forest.

**REDUCE. REUSE. RECYCLE.**



Visit the Recycling Management Committee's internet web site at <http://bitra.cemiami-dade.fl.us/rm>



# How much paper do we use?



- The average office worker uses 10,000 sheets of copy paper each year.
- Each Canadian uses up to four trees every year in paper products.
- The United States alone, which has less than 5% of the world's population, consumes 30% of the world's paper.
- Over 40% of wood pulp goes toward the production of paper.
- Printing and writing paper equals about one-half of U.S. paper production.

<http://www.moea.state.mn.us/campaign/paper/>

# Reasons to reduce printing

## ■ Cost (\$\$\$)

- Citigroup, a large financial services company, determined that if each employee used double-sided copying to conserve just one sheet of paper each week, the firm would save \$700,000 each year.
- Bank of America cut its paper consumption by 25% in two years by increasing the use of on-line forms and reports, e-mail, double-sided copying, and lighter-weight paper

<http://www.moea.state.mn.us/campaign/paper>

# Reasons to reduce printing

- Less clutter
- Reduce the wear and tear on your printer
- Easier to be more organized

# Recycling Paper

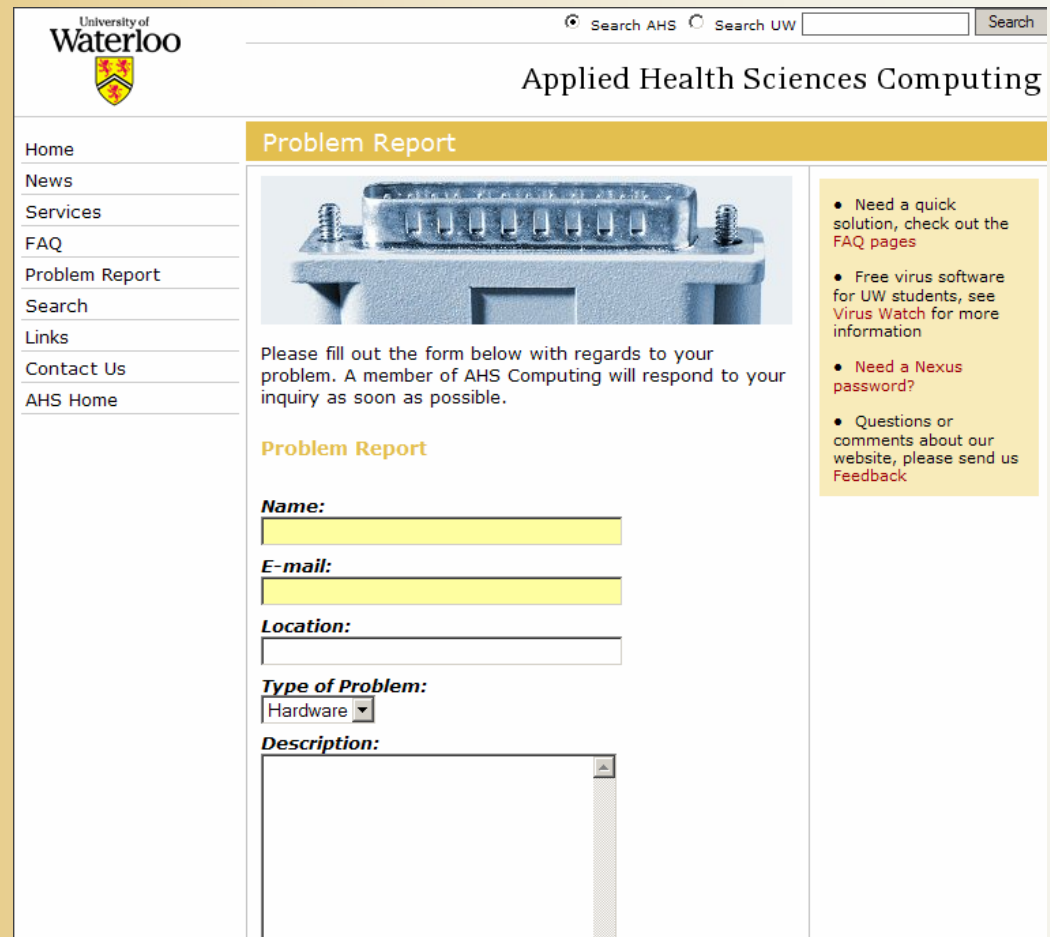
- Each ton of paper recycled saves:
  - 17 trees
  - 240 L of oil
  - 160 L of gas
  - 4,210 kWh of electricity
  - 26,500 L of water
  - 3 m<sup>3</sup> of landfill space
- Imagine if we did not produce all of this paper in the first place?

# General Tips: Go electronic!

- Go electronic: Route memos and newsletters that people should see, but do not need to keep. That way newsletters and other documents can be shared.
- But remember to keep your e-mail clean and organized

# Online Forms

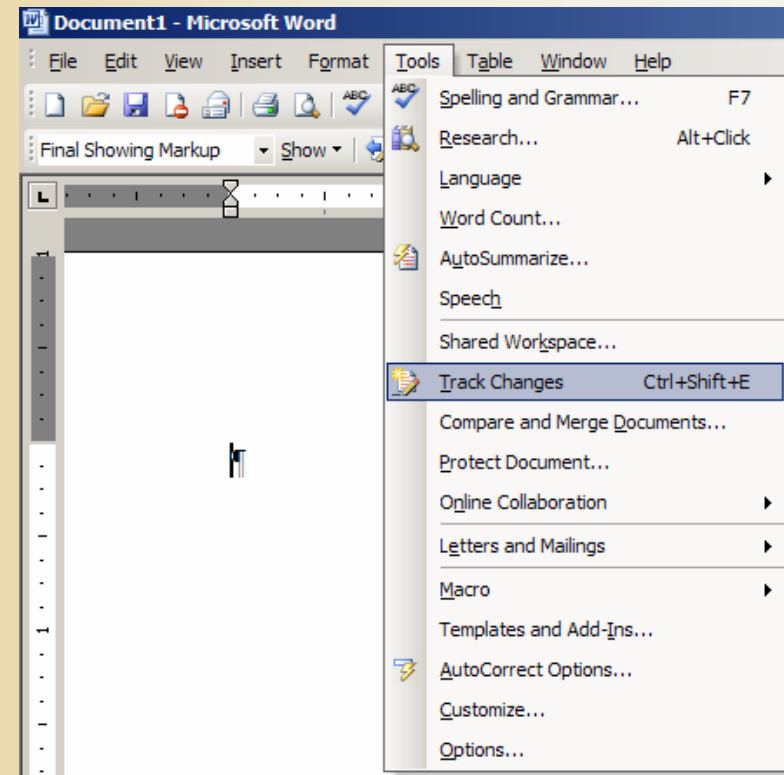
- Creating online forms is relatively easy and will reduce the paper consumption
- Remember, you can always ask for help from your IT Department!
- Coffee is always a good bribe!



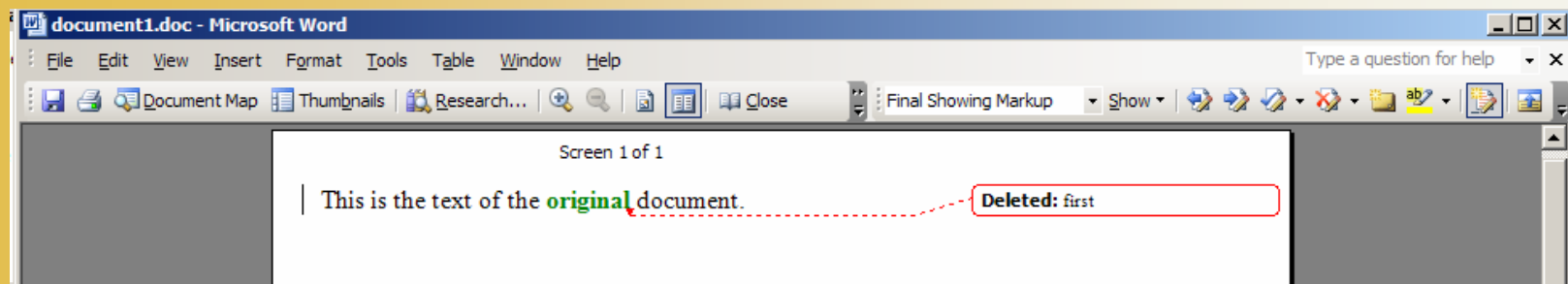
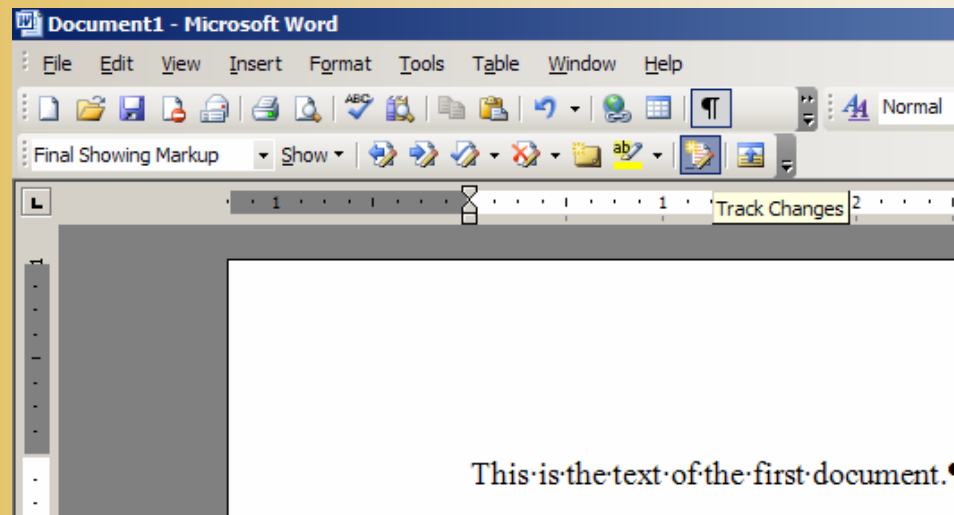
The screenshot shows the 'Problem Report' form on the Applied Health Sciences Computing website. The form includes a navigation menu on the left with links to Home, News, Services, FAQ, Problem Report, Search, Links, Contact Us, and AHS Home. The main content area features a header for 'Problem Report' and a sub-header with an image of a computer component. Below the image is a text prompt: 'Please fill out the form below with regards to your problem. A member of AHS Computing will respond to your inquiry as soon as possible.' The form fields include: 'Name:' (text input), 'E-mail:' (text input), 'Location:' (text input), 'Type of Problem:' (dropdown menu with 'Hardware' selected), and 'Description:' (text area). A sidebar on the right contains a list of links: 'Need a quick solution, check out the FAQ pages', 'Free virus software for UW students, see Virus Watch for more information', 'Need a Nexus password?', and 'Questions or comments about our website, please send us Feedback'.

# Revising documents on your screen

- Use revision features in word processing software. You can edit draft documents on screen instead of printing out drafts and making hand-written comments.

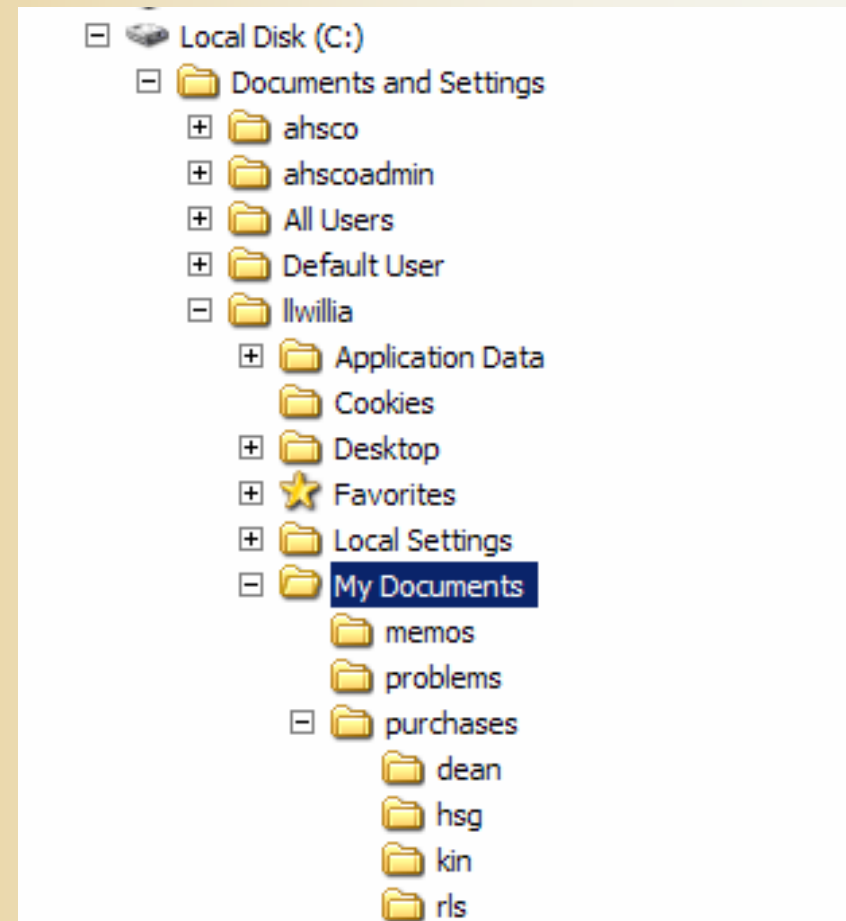


# Demonstration of Track Changes



# Create an electronic filing system

- Create an electronic filing system for quick, easy retrieval.
- Develop a method/technique to name your files and folders
- For example:
  - Be consistent in your naming conventions
  - For example, decide the order/format for dates



# An example

- When you receive a pdf or any file from an external source put in a folder on your hard drive
- Rename it to something that means something to you!

# If you have a Palm or a Blackberry!



- If you have a Palm or a Blackberry copy files from your computer to your handheld that you would normally have printed
- Examples:
  - Maps
  - Directions
  - Documents needed for meetings
  - Instructions


# Fundamental Shift in Philosophy



- The biggest change has to be done in the way that we think and in turn the way that we act
- While we may like paper copies of documents, think about the bigger picture

# Read things online

- Read newspapers and magazines online instead of getting a 'hard' copy



TheStar.com - News/News - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Web Favorites

Address http://www.thestar.com/NASApp/cs/ContentServer?pagename=thestar/R4

**TORONTO STAR**  
www.thestar.com  
Thu May. 12, 2005. | Updated at 09:32 PM

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Corrections  
Most Emailed  
Articles  
Today's Paper  
Star Columnists

Special Reports  
> Ontario Budget  
> Sex & City Hall  
> Broken Boys  
> Gomery Inquiry  
> [More Specials]

**SHOWDOWN IN OTTAWA**

**Tories, Bloc force closure of House**  
May. 12, 2005. 07:139 PM  
OTTAWA - The opposition grabbed control of the House of Commons today, shut it down and said Governor General Adrienne Clarkson should move to trigger a federal election. Meanwhile, a federal official revealed Clarkson has spoken with Prime Minister Paul Martin and consulted constitutional experts this week. [\[Full Story\]](#)  
[Speak Out: Should the Liberals resign?](#) [Voices: Responses](#)  
[Showdown in a week \(May 12\)](#) [Hébert: One foot in the grave \(May 11\)](#)

**CRTC to regulate Internet phone business**  
May. 12, 2005. 06:37 PM  
GATINEAU, Que. — The CRTC says it will treat phone service over the Internet as if it was just another local telephone service - a decision that puts more restrictions on Canada's biggest phone companies than on their rivals. [\[Full Story\]](#)

**York U. pulls out of stadium project**  
May. 12, 2005. 07:39 PM  
York University has pulled out of the stadium project that was designed to be the new home of the Toronto Argonauts and the site for the world youth soccer tournament in 2007. The university made the announcement this afternoon, saying the withdrawal by the Argonauts made "it impossible for us to

# Think before you print!

- Sometimes it is necessary for documents to be printed. Try to print responsibly.
- Promote a "think before you print" attitude.
- Consider sharing some documents with co-workers.
- Print only the number of copies needed for the meeting, don't make extras.

# So...

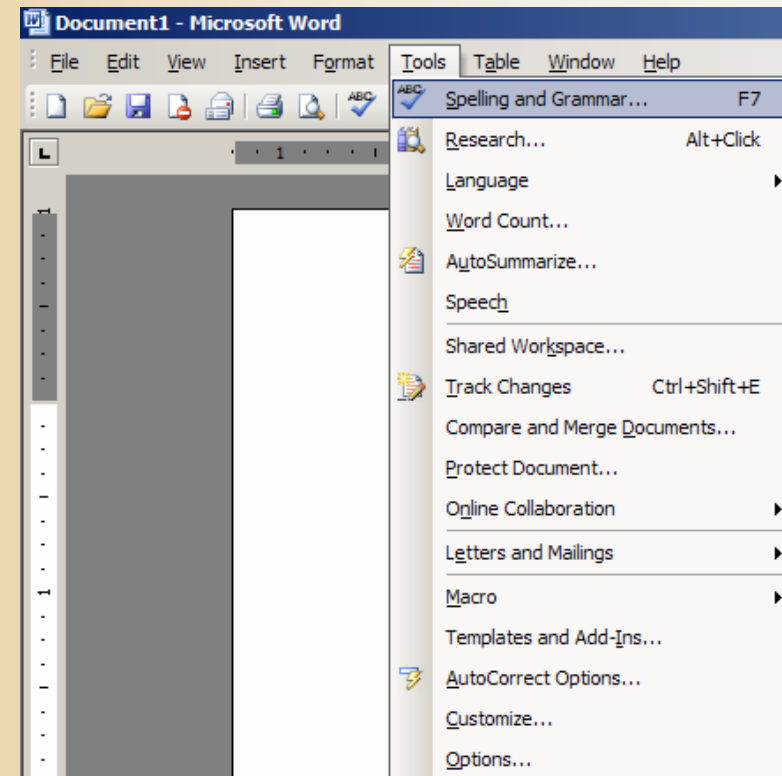
- Are you convinced yet???
- Ok... we understand that you are going to print
- So... how can we print more efficiently???

# Tips if you must print!

- Print only the pages you need.
- If only a few pages of the document are needed, print only those pages instead of the whole report.
- Most software programs provide this option under the print function.

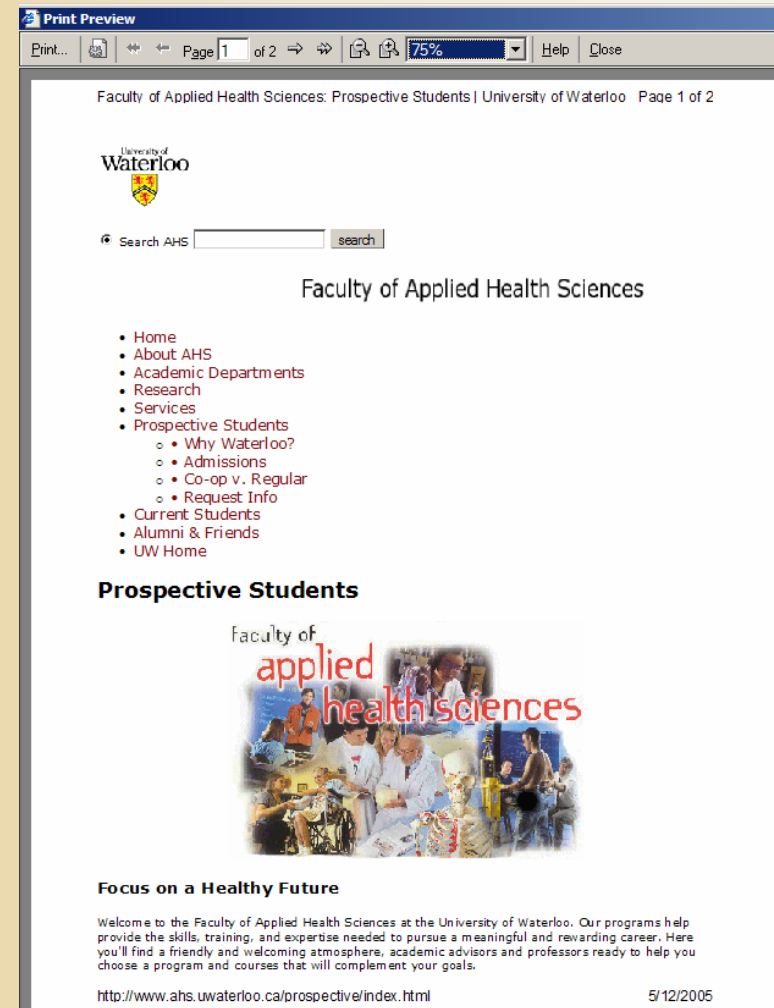
# Tips if you must print!

- Always use the spell/grammar tool to help avoid errors that can cause documents to be reprinted.
- Even if a document has an error, as long as it is not a final copy, write on the correction



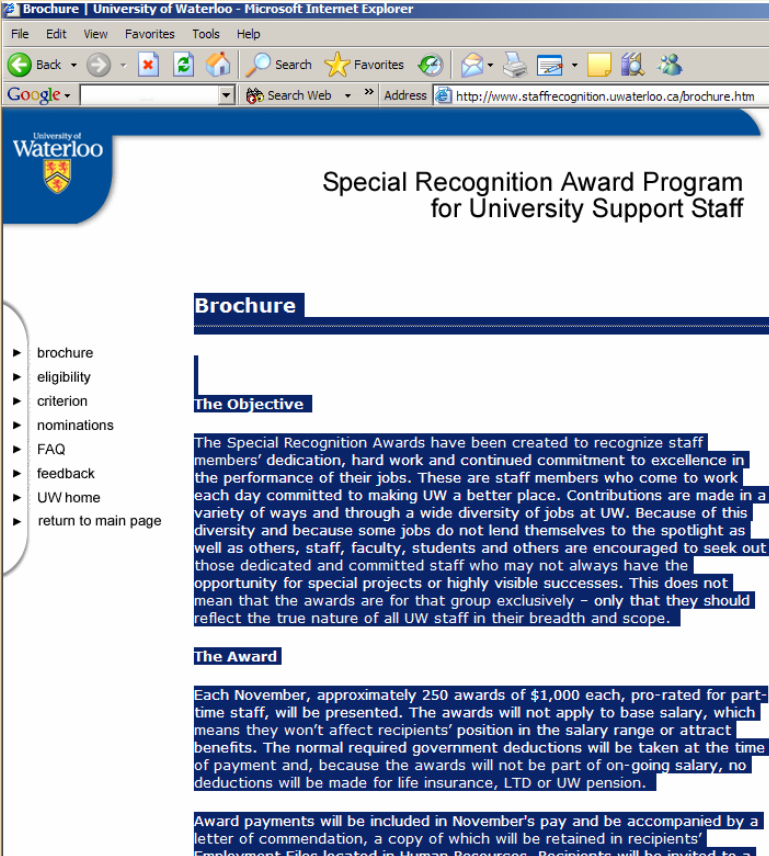
# Tips if you must print!

- Preview documents before printing.
- Using the print preview allows you to proofread your document for errors before you print.
- You can determine whether or not you will need all the pages of a document



# Tips if you must print!

- Select the text that you need printed usually from the web or from an e-mail, then copy it then paste it into MS Word
- Example of staff recognition form
- <http://www.staffrecognition.uwaterloo.ca/brochure.htm>



Brochure | University of Waterloo - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Print Mail News RSS Feeds

Google Search Web Address <http://www.staffrecognition.uwaterloo.ca/brochure.htm>

University of Waterloo

Special Recognition Award Program for University Support Staff

**Brochure**

- ▶ brochure
- ▶ eligibility
- ▶ criterion
- ▶ nominations
- ▶ FAQ
- ▶ feedback
- ▶ UW home
- ▶ return to main page

**The Objective**

The Special Recognition Awards have been created to recognize staff members' dedication, hard work and continued commitment to excellence in the performance of their jobs. These are staff members who come to work each day committed to making UW a better place. Contributions are made in a variety of ways and through a wide diversity of jobs at UW. Because of this diversity and because some jobs do not lend themselves to the spotlight as well as others, staff, faculty, students and others are encouraged to seek out those dedicated and committed staff who may not always have the opportunity for special projects or highly visible successes. This does not mean that the awards are for that group exclusively - only that they should reflect the true nature of all UW staff in their breadth and scope.

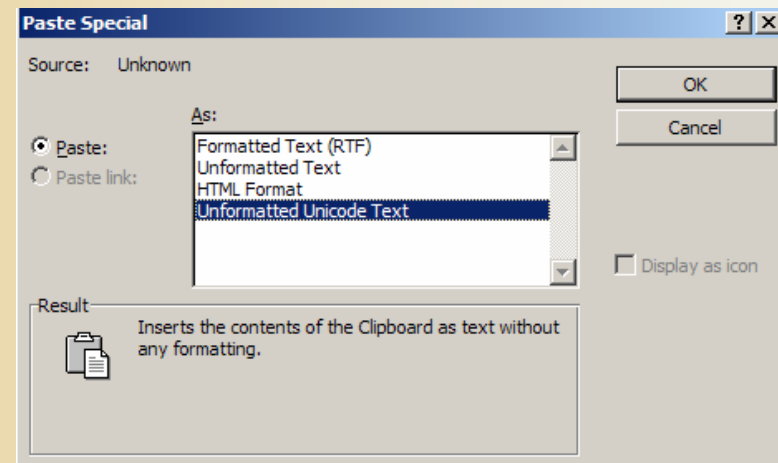
**The Award**

Each November, approximately 250 awards of \$1,000 each, pro-rated for part-time staff, will be presented. The awards will not apply to base salary, which means they won't affect recipients' position in the salary range or attract benefits. The normal required government deductions will be taken at the time of payment and, because the awards will not be part of on-going salary, no deductions will be made for life insurance, LTD or UW pension.

Award payments will be included in November's pay and be accompanied by a letter of commendation, a copy of which will be retained in recipients' Employment Files located in Human Resources. Recipients will be invited to a

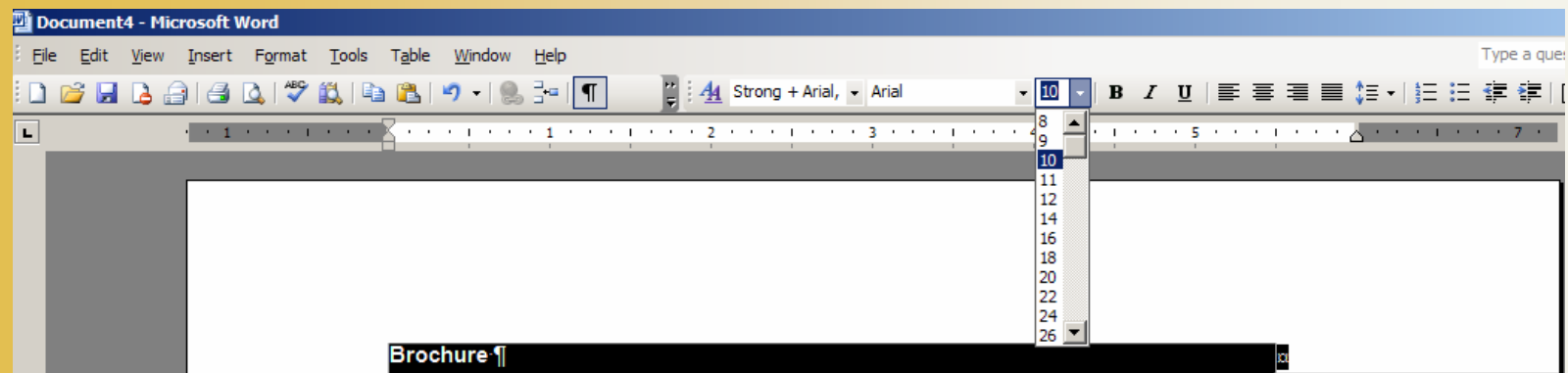
# Format Printing

- Paste the text in MS Word
- Make sure to go the menus and Select *Edit – Paste Special* then select Unformatted Text
- Then format it!!!!



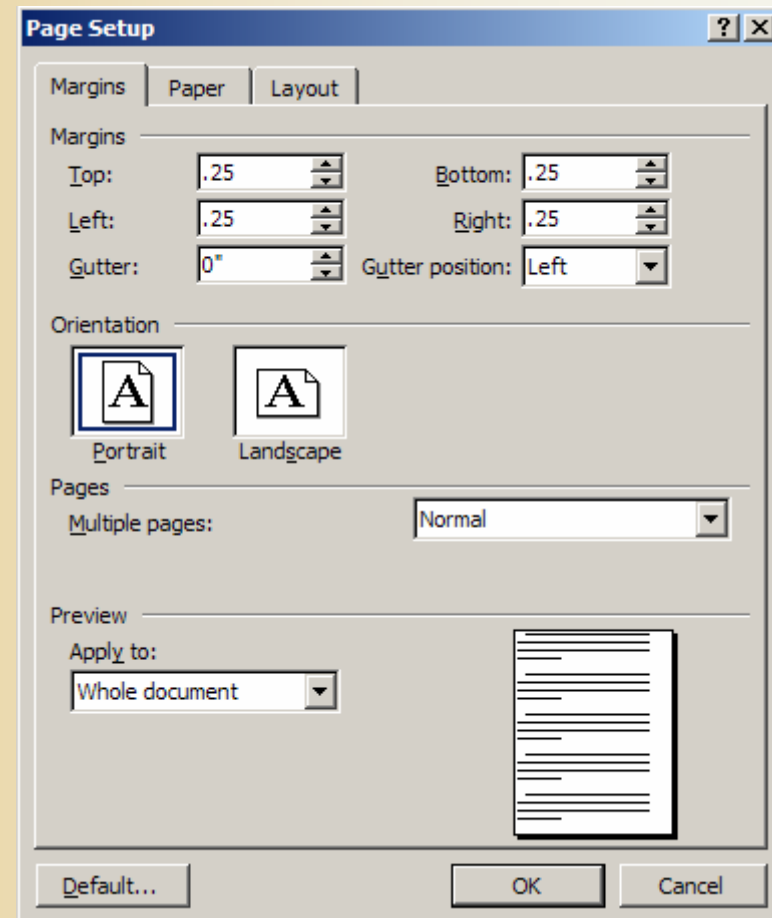
# Format your printing

- Change your font type to a font that is more compact, Arial and Microsoft Sans Serif are excellent choices
- Reduce the font to a smaller yet still readable size
  - 10 pt is usually satisfactory



# Format your printing

- Increase your margins to maximize the printing area

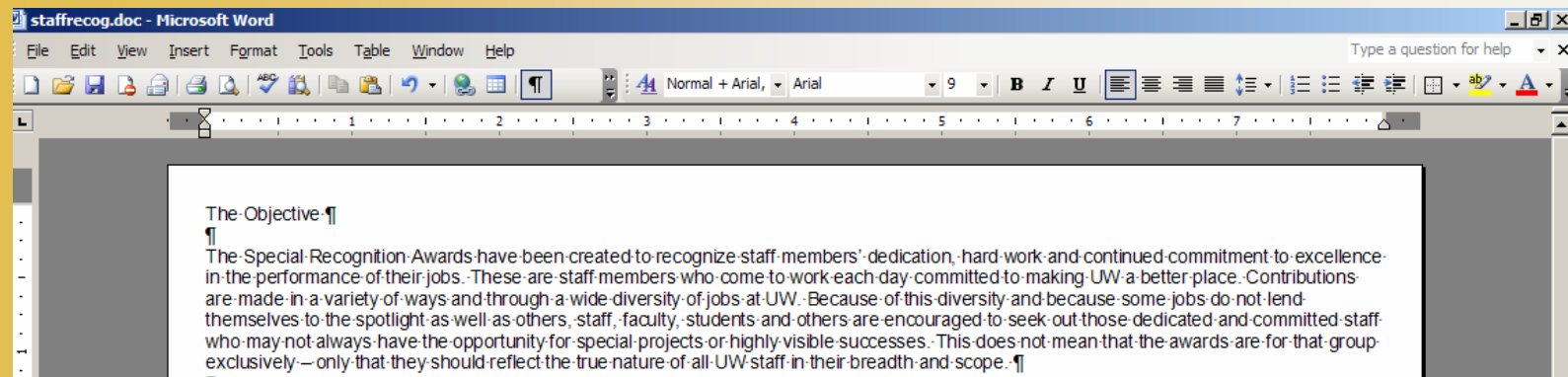


# Format your Printing

- Other hints
  - Reduce carriage returns
  - Delete superfluous headings
  - Combine shorter paragraphs
- Our example of a 3 page document from the web turned into a 1 pager!!!

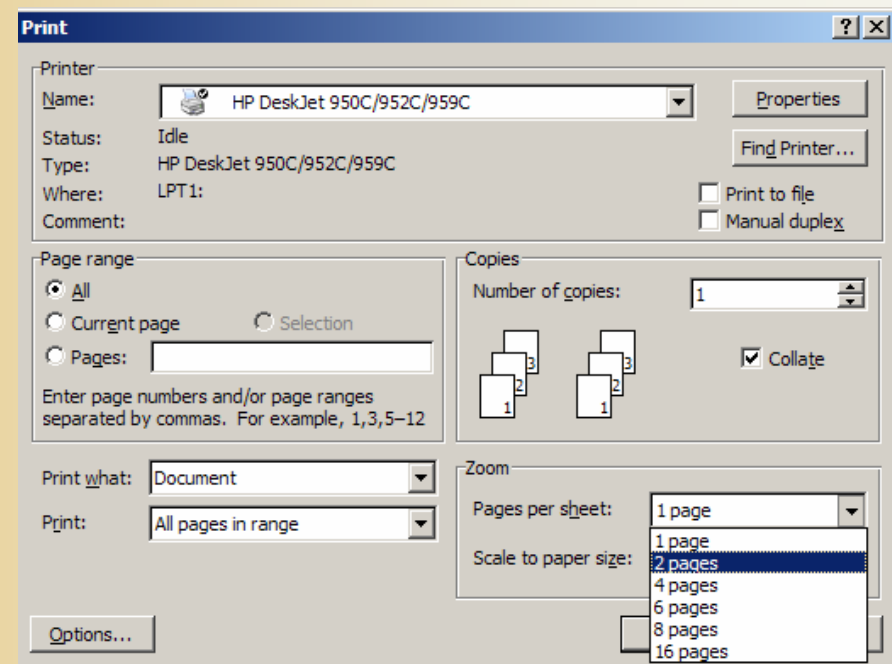


Microsoft Word  
Document



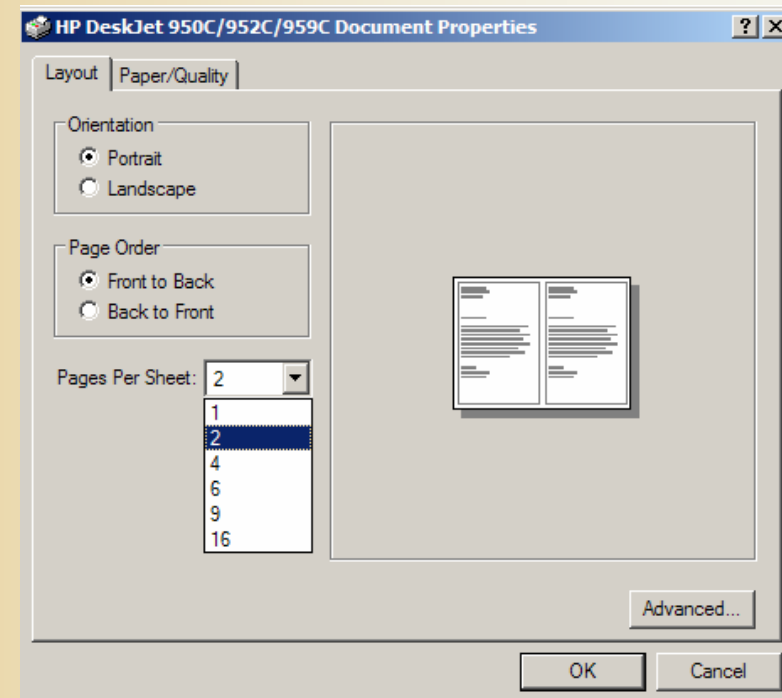
# Print more pages per sheet

- When you print in all Microsoft applications you have the option to print more than one page per sheet



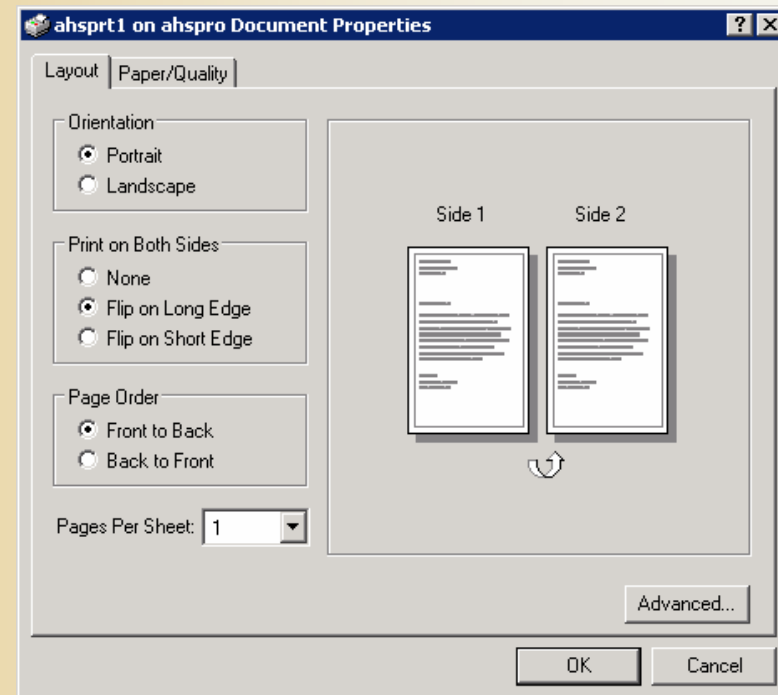
# Print more pages per sheet

- When you print select the *Properties* of the printer and then select *Layout*



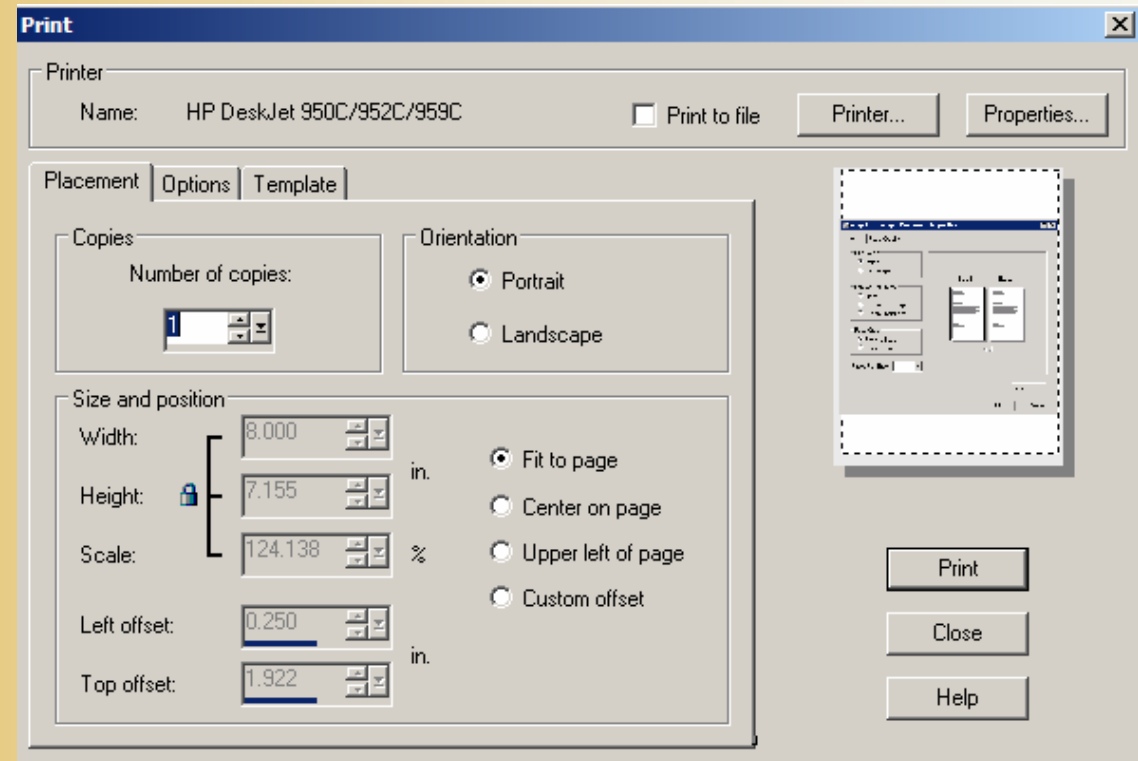
# Double Sided

- If you can, print double sided
- Do the math...
  - Double sided + 4 up  
= 8 pages per sheet



# Fit to page!

- Some software programs will give the user the option of fitting the document to one page
- This will do the resizing for you!



# Off the wall tips

- Paper or Plastic? Plastic but be careful with the bread
- Quit your spitball habit
- Get rid of the bird and the subsequent lining of the birdcage

# Importance of E-mail

- Whether we like it or not e-mail is an important method of communication



# Setting up an E-mail System



- Essentially there are 2 types of e-mails
  1. **Reference**
    - Reference e-mails contain information that is not required to complete an action; it is information that you want to keep in case you need it later.
  2. **Action**
    - Action e-mails contain information you must have to complete an action.

# Conversational E-mails

- If an e-mail arrives in your inbox that is based in conversation should be read, responded to (if necessary) and then deleted!
- You wouldn't walk through the halls with a pen and notepad writing down the conversations you engage in...why would you keep similar e-mails???



# Deleting E-Mails

- Does the information relate to one of your meaningful objectives?
  - If not, delete it.
- Can you find the information somewhere else, such as another department, your company intranet, or the Internet?
  - If so, delete it.

# Deleting E-mails

- Are you likely to refer to the information in the next six months?
  - If not, delete it.
- Do you have to keep the information because it is legal or human resources information?
  - If not, delete it.
- Is the e-mail over 2 years old?
  - If so, delete it.

# Just say NO!

- Not reading that mailing list you subscribed to? Get off it. The list is likely archived anyway.
- Getting too many jokes from family or friend, politely tell them that you have a problem with mail overload and ask them to stop sending jokes.

# Bogged Down by Questions???



- Create a filter that sorts the e-mail in to a specific folder.
- Designate a time in your work week to answer the questions. First read through all the questions, then set about to answer them. It's possible that many students are asking the same question and you can answer them all at once.

# Personal Messages

- Keep your work e-mail for work and setup a second account for personal e-mail, entering contests, eBay purchases, etc.
- This works for some people.... Remember to check your other account!

# Your Inbox

- **Remember, your Inbox is your Inbox.**
- It's not your Task List.
- You don't use your paper inbox as a filing system, do you? (Okay, maybe you do. So how's that working for you, anyway?)
- Once you've cleaned out your inbox, nicely categorized and prioritized your Task list, don't forget to use it. If you do, you'll soon have a long "To Do" list, and a full Inbox, not exactly an improvement on the situation.

# Your Inbox

- Remember your inbox is not your address book
- An e-mail message is not an address book entry
- Take the time to make an address book entry... it will save you time in the long run!

# E-mail Attachments

- Remember you are in control!
- Do not let your attachments rule you!
- Don't edit attachments in the attachment directory
- Always save your attachment to a directory based upon your filing system on your hard drive

# The 4 D's of E-mail

**1) Delete it!**

**2) Do it!**

# 3) Delegate it!

**4) Defer it!**

# 4 D's of E-mail

- Decide what to do with each and every message
- How many times have you opened, reviewed, and closed the same e-mail message over and over?
- Some of those messages are getting lots of attention but very little action.
- It is better to handle each e-mail message only once before taking action—which means you have to make a decision as to what to do with it and where to put it.
- Under the 4 D's model, you have four choices:
  1. Delete it
  2. Do it
  3. Delegate it
  4. Defer it

# E-mail is not your filing system



- Don't use your e-mail as a filing system.
- And for heaven's sake, don't rescue a co-worker who is looking for something you happen to have tucked away in an e-mail folder.
- Let them rescue YOU!
- If someone else owns a document/plan/conversation, let *them* store it for *you*. Chances are if you need it, someone else has it.

# Dedicate time!

- How many interruptions do you get every each day?
- It's nearly impossible to complete anything when you allow constant interruptions from the phone, people stopping by your office, and instant messaging. So it's critical that you set aside uninterrupted time to process and organize your e-mail.

# Book Yourself!

- Book yourself a recurring appointment for a half-hour each day to process e-mail. During this time don't answer the phone or take interruptions, and work only on processing your Inbox.
- At first, keeping these appointments will take discipline, but over time the discipline becomes habit. And once you get to zero e-mail in your Inbox, you'll see the value of this scheduled time.

# Ignore Incoming E-mail... until you have time!



- Can you imagine if snail mail was real-time?
- Would you wait by your house's mailbox, and open each piece of junk mail as it came in?
- Change your default view on Outlook to open to your Calendar and Task List, rather than your Inbox. Turn off the popup toast and reminder sound when e-mail comes in.
- Don't respond immediately to each incoming e-mail.

# Pickup the phone!

- Pick up the phone once in a while.
- You'll be surprised at how much you can get done in a phone call rather than on e-mail. And it may just save you playing e-mail tag back and forth several times with the person.



# Being Courteous Sending E-mail



- Didn't your mother ever tell you to be nice?
- Clean up messages headers et al.
- Deleting the non-pertinent info
- Signature (if you know the person, then the signature is pointless!!!)
- Not attaching attachments
  - Send a link if you can

# Daily Triage

- First thing in the morning, look at all new mail, Subjects & Senders Only and delete as many e-mails as possible. Scroll through all your headers and delete:
  - Spam and junk mail
  - X-rated stuff
  - automated messages
  - no subject and you don't recognize the sender
  - mailing lists items if there's no time to read them
- At the same, move anything you don't want to deal with at the moment to the appropriate folder.

# Read it Once!

- Make it your motto. If at all possible, do not leave mail in the inbox for later. Once you've looked at the body of a mail message, try to take care of it right then and there, no matter what. Especially if it's a long mail message. You don't want to have to re-read again later to answer it.
- It's OK to skim it first. If you decide to answer it later, then make that a conscious decision

# Be Concise

- If your mail is concise, then the receiver will not have to mail you back and ask for clarification.
- Proof read your e-mail before sending it.
- Check dates and days of the week
- Check who it is being sent to.
- Answer all the questions the person posed, so you don't get another message back from them.
- Use a meaningful subject line (this is selfish because if they mail you back you will have set a subject that means something to you)

# Don't add to others Mail Overload



- Do you really need to send that joke?
- It's OK to say "Thanks" but does that just invite a "You're welcome"?
- Do you really need to do a "Reply all"?
- Do you really need to attach a file?
- Do you need to forward chain letters?
- Are you sure what you are forwarding isn't a hoax?
  - [www.snopes.com](http://www.snopes.com)

# Flagging E-mail

- Remember that the priority tags that are attached to e-mail are the sender's priority tag not yours.
- You can use a filter in Outlook to colour code based on sender, subject, etc.

# Where do I start?

- If you are at a loss as to where to start, copy the contents of your current inbox to newly created folder (ie. 2006inbox)
- You can then start from scratch using the techniques learned from this seminar

# Do it!

- DO IT (in less than two minutes)
- If you can't DELETE IT, then decide, "What specific action do I need to take?" and "Can I DO IT in less than two minutes?" If you can, just DO IT.

# Do it Part II

- There is no point in filing an e-mail or closing an e-mail if you can complete it in less than 2 minutes.
- Try it out—see how much mail you can process in less than 2 minutes. I think you will be extremely surprised and happy with the results. You could file the message, you could respond to the message, or you could make a phone call. You can probably handle about one third of your e-mail messages in less than two minutes.

# Delegate it!

- If you can't DELETE IT or DO IT in two minutes or less, can you DELEGATE IT?
- If you can delegate it, do it right away. You should be able to compose and send the delegating message in about two minutes. Once you delegate the action, delete the original message or move it into your e-mail reference system.

# Defer it!

- If you cannot DELETE IT, DO IT in less than two minutes, or DELEGATE IT, then the action required is something that only you can accomplish and that will take more than two minutes.
- You'll probably find that about 10 percent of your e-mail messages have to be deferred.

# Defer it!

- There are two things you can do to defer a message:
  1. turn it into an actionable task
  2. turn it into an appointment
- When you're using Outlook 2003, you can DEFER e-mails with actions by turning the e-mail into a task on your Task List. Name the task to clearly state what action is required so that you don't have to reopen the e-mail message. The result is a clearly defined list of actions in your task list that you can prioritize and schedule to complete on your Calendar.

# 12 Steps

- (Reuters) -- Alcoholics have one, and so do drug abusers. Now people addicted to e-mail also have a 12-step program designed to tackle their obsession. Following are the 12 steps of a plan devised by executive coach Marsha Egan in Pennsylvania to teach people how to manage their e-mail:
  1. Admit that e-mail is managing you. Let go of your need to check e-mail every ten minutes.
  2. Commit to keeping your inbox empty.
  3. Create files where you can put inbox material that needs to be acted on.
  4. Make broad headings for your filing system so that you have to spend less time looking for filed material.
  5. Deal immediately with any e-mail that can be handled in two minutes or less but create a file for mails that will take longer.

# 12 Steps

6. Set a target date to empty your in box. Don't spend more than an hour at a time doing it.
7. Turn off automatic send/receive.
8. Establish regular times to review your e-mail.
9. Involve others in conquering your addiction.
10. Reduce the amount of e-mail you receive.
11. Save time by using only one subject per e-mail; delete extra comments from forwarded e-mail, and make the subject line detailed.
12. Celebrate taking a new approach to e-mail.

# Off the Wall Tips

- Pull a Howard Hughes!
- Never standup in a Canoe!
- Don't take any wooden nickels!
  
- Don't take things too seriously, have fun! It's only work, if you make it work!

# Question & Suggestions...

- If you have questions or suggestion, please contact me at your leisure
- Lowell Williamson  
[llwillia@healthy.uwaterloo.ca](mailto:llwillia@healthy.uwaterloo.ca)