BSBITU213
Use digital technologies to communicate remotely

Release 1

Learner guide

Aspire learning resources

BSBITU213

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Learner guide

Aspire Version 1.1

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Contents

Before you begin

This learner guide is based on the unit of competency *BSBITU213 Use digital technologies to communicate remotely*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Icon	Feature of the learner guide	How you can use each feature
	Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
	Examples	These highlight learning points and provide realistic examples of workplace situations.
	Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
	Summaries	Key learning points are provided at the end of each topic.
	Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	• Recognises textual information within different materials and interprets information to determine requirements as well as confirming accuracy of content
Writing	• Records key information relevant to requirements and prepares simple correspondence using basic punctuation, text and correct spelling
Oral communication	• Obtains information through listening and questioning and uses clear and appropriate language suitable to audience
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Get the work done	• Recognises and responds to routine problems in context of own work

Topic 1
Identify methods for digital communication

To determine the most appropriate application to use for digital communication, you need to identify the purpose, the intended audience and the content you wish to communicate.

You may need to ask your supervisor to clarify these things, or may be able to determine one based on the other. For example, once you know the purpose, this will help you to work out the intended audience.

The application you select must be available in your organisation and be in line with organisational policies and procedures. For example, your organisation may require all staff to communicate task requirements and meeting requests via email. This means it would not be appropriate to communicate this information via text message.

Policies and procedures to guide staff in the use of online communication platforms have been developed by most organisations, which you will need to follow when creating and responding to posts, emails and other forms of digital communication.

Mobile devices such as laptops, mobile phones and tablets can be similar in functionality. Personal preference or experience can determine which device is chosen for work outside of the office. As new technology is introduced to the office environment, effective training should be provided so that the organisation and its employees gain value from the investment in any purchases.

In this topic you will learn how to:

1A   Identify the purpose of communication and the intended audience
1B   Identify and select the most appropriate application for communication

1A Identify the purpose of communication and the intended audience

You need to be able to identify why and how you will communicate electronically, as well as the intended audience.

Before beginning your digital communication, you need to know:

- the purpose – why you are communicating
- the intended audience – who you are communicating to.

This will help you to determine the most appropriate method of communication you should use, and provide you with an idea of:

- the content – what you will say
- the language and tone – how you will say it.

For example, you may have been asked by your manager or supervisor to inform all staff in the organisation of an upcoming meeting. Now that you know the purpose and the audience, it helps you to determine the content and format: an email should be sent to all staff with the details of the meeting, written in a polite but friendly tone. The advantage of email is that it may be accessed from a computer or tablet (by those working in the office or working from home) or from a mobile (by those commuting to or from work, or travelling offsite).

Purpose of communication

To ensure you communicate effectively and that your message is received by the correct people, it is important to know the purpose of the communication.

There may be a range of purposes for which you need to communicate. The purpose may be immediately clear, or you may need to ask your manager or supervisor for clarification.

The purpose of digital communication could be to:

- inform staff of an upcoming meeting
- communicate task requirements
- communicate task progress or completion
- ask questions or make a request
- answer questions or provide information about something
- give a customer a quote on the price of products or services
- send or receive invoices
- say thank you or acknowledge that the message has been received.

<table>
<tr><td rowspan="2">**Example**</td><td>**Determining the purpose of communication**</td></tr>
<tr><td>

Joanne's manager asks her to email last month's sales results to the marketing team. She now knows the method of communication (email), the content she is to include (last month's sales results) and the audience (the marketing team). However, she does not know why she is being asked to do it (i.e. the purpose).

She decides that the easiest way to determine the purpose is to ask her manager directly.

Her manager tells her the purpose is to determine whether a new line of baby products is likely to sell. Joanne thinks about this and realises it is not helpful to send a figure to the marketing team on the total number of sales for all of their products. Instead, the team would probably prefer the sales results to be split up into different categories so they can see how well baby products are selling in comparison to other products.

After she sends the email, the sales manager responds thanking her for clearly showing the different sales results for various products produced by the company. They decide to go ahead with launching the new range of baby products.

</td></tr>
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Intended audience

Knowing who the intended audience is will help you to work out the best method of communication and the language you should use.

Just because you understand the purpose of the communication does not mean you know who the intended audience is. You may need to ask your supervisor to clarify who to send messages to.

However, often you can work out the intended audience based on the purpose. For example, you may need to communicate that you will be out of the office for a few days to attend a conference. You need to determine who to send this message to and who does not need to know. You may need to inform internal staff, including:

- other staff in the office
- other staff who are offsite or work in other locations
- your manager (if they do not already know)

Depending on your job role, you may not need to inform external contacts such as:

- any customers/clients that you deal with directly
- other people you are in contact with as a part of your job.

Check with your supervisor if you are unsure who to send the communication to.

Determining what to include in the content

Once you know the purpose of your communication and the intended audience, you can determine what you should include in the content.

Bear in mind that some people may not need as much detail as others. For example, if you are sending a stationery order to a supplier, you may need to indicate specific brands and prices of items to ensure the correct stock is delivered. However, if you are asking staff in the office which stationery products they require, they do not need to know the specific brands you are intending to order or the cost of each item.

> **Depending on the purpose of communication, you may need to include:**
>
> - specific dates, such as the dates of upcoming meetings or deadlines
> - amounts, such as the amount of stock to order
> - prices, such as quotes for goods and services
> - contact details, such as another person to contact in your absence
> - screenshots, such as error messages to indicate an issue you are having
> - attachments, such as documents, pictures or a screenshot.

Determine tone and language

Knowing who you are communicating to and what their prior knowledge is will help you to decide what tone of language to use.

For example, if you are communicating to a manager or important client, you would most likely need to use a formal business tone. You may need to start an email with 'Dear Mr O'Brian' and end it with 'Yours sincerely' before including your full name and job title.

If, on the other hand, you are communicating to a friend or colleague you work closely with, you may be able to use a more relaxed, informal tone. You may start an email with 'Hi Mike' and end it with 'Cheers' or 'Thanks' followed by your first name.

You may even decide that another form of communication is appropriate. For example, if you know that a colleague is out of the office and needs to know something urgently (such as a changed meeting time), a text message sent directly to their mobile may be more appropriate than an email, as the person is more likely to see the message straight away. If you are sending a text message, a less formal tone is generally appropriate; for example:

'Hey Mike, just letting you know that the meeting that was supposed to start at 10am today has been rescheduled to 11am. Cheers.'

When communicating with people outside of the organisation, you may need to avoid certain terms, such as jargon and abbreviations, that are known only to staff. For example, while you may commonly use terms like 'ROI' (return on investment) or 'TBC' (to be confirmed) in your day-to-day interactions with colleagues, a client may need these terms spelled out or even explained. This will come down to their prior knowledge and how much they are required to know.

Commercially sensitive information

Commercially sensitive information (also known as confidential information) is any information that could negatively affect a business if it was disclosed (communicated to outside parties).

Commercially sensitive information is anything that could negatively affect a commercial interest (i.e. a business's ability to operate in a competitive market).

Another form of commercially sensitive information is a trade secret. This could include:
- technical information, such as an invention, manufacturing process, recipe or design
- business information, such as supplier details, pricings and cost estimates, and product development plans.

> **To determine if the information is commercially sensitive, consider the following questions:**
>
> - Could a negative consequence occur if the information was disclosed?
>
> - Is the negative consequence significant?
>
> - Is the negative consequence likely?
>
> - Is there a clear link between the disclosure and the negative consequence occurring?
>
> - Would the negative consequence still occur if the information was not disclosed?

You must not communicate anything that could be deemed commercially sensitive to anyone who is not authorised to be given the information.

When determining the content of your communication, consider whether any of it could be deemed commercially sensitive. If you think it could, ensure it is only sent to those authorised to know the information. For example, it would not be appropriate to include customers and clients when a message or attachment includes trade secrets or other confidential information. Be particularly careful when forwarding and replying to emails as other people can be included in the cc or bcc fields who should not be given access to certain information.

Practice task 1

Read the following case study and answer the questions that follow.

Case study

Rory works as an administration assistant for technology giant Americain. His manager, Peter, is on his way to a meeting with an important client, where he intends to showcase some of their latest developments. Rory receives a phone call from Peter asking him to send him their designs for a new form of wearable technology that the company plans to produce. He had forgotten to save a copy of these plans on his tablet before he left for the meeting.

Rory locates the files on the server and sends them through.

Question 1

Who is the intended audience that Rory needs to communicate with?

Question 2

What is the purpose of the communication?

Question 3

What content does Rory need to include and is this commercially sensitive?

1B | Identify and select the most appropriate application for communication

Once you have identified the purpose, intended audience and content, you must select an appropriate application to communicate the information.

There are many different systems to communicate digitally with those internal and external to the organisation (including colleagues who work remotely).

These include, but are not limited to:

- emails
- text messages sent to a mobile phone
- text or voice messages sent via a messaging app
- video or web-conferencing software.

These applications are generally used to communicate information between a select group of individuals. For example, an email may be sent to an individual, a team of people or to a mailing list of customers. Anyone who was not sent the message directly is not likely to read it (unless the message has been forwarded to them by someone else).

However, other forms of digital communication are accessible by the general public, meaning anyone can access and read the information. This includes:

- blogs and online forums
- podcasts
- other content that is published directly to a website.

When publishing anything online, be careful not to breach privacy and confidentiality requirements.

Mobile applications

Mobile device technology means it is possible to access your email account wherever you are, as long as you have an internet connection.

All you need to get started is a tablet or smartphone that provides access to email, as well as a connection to the internet, either through WiFi or through mobile data. There are many applications that allow people to communicate using smartphones and tablets.

Wireless connection to the internet from a mobile can reduce phone call costs and help employees use their time more effectively. However, you may need to consider the software, hardware and connectivity costs, as well as the operational costs.

A text message (also called an SMS) enables mobile phone users to receive and send short messages on their mobiles. Most text messages can be received free of charge, but in order to send texts, phone users usually have to pay a monthly fee to their service provider or a small fee for each message. Many mobile service providers offer SMS texts free of charge as part of a contract or mobile phone plan. Just like an email, a text message can be sent to one person or to multiple people at once.

Text messages can also be sent through cloud-based services such as Apple's iMessage, Google Message or WhatsApp. These have the advantage of allowing you to see a conversation thread from different contributors in the group.

Text messages can be useful when communicating with staff in various locations. For example, you may need to send a text message to your manager informing them that you are running late for work. Your organisation may also require you to send text messages to clients or customers in certain circumstances, such as to inform customers about an upcoming appointment.

Types of messaging applications

The continuing innovation in communication technology means there are increasing methods for sending and receiving digital communications.

Wireless internet and handheld communication devices are common in many workplaces, meaning that digital communication can take place from many different locations using a number of devices and applications. You need to be able to access and use the appropriate application for communicating electronically in your workplace, and ensure this adheres to organisational policies and procedures.

Emails are the most commonly used application in businesses, and there are a number of email providers that offer similar services. You will need to be able to access and use the email system adopted by your organisation. This learner guide focuses primarily on Microsoft Outlook, but many have a similar setup and functionality.

There are a number of other applications you could be required to use. However, not all may be available in your organisation. You should also check whether a policy or procedure requires you to use a certain type of application when communicating specific information or contacting particular people, such as customers and clients.

Here are features of some of the applications you may have access to in your organisation, including some of the strengths and limitations of each.

Type of application	Features	Strengths	Limitations

Emails	• Messages may be targeted to individuals or groups
	• Commonly used in most organisations
	• Suitable for short and long messages
	• Common email service providers include:
	  – Microsoft Outlook
	  – Google Gmail
	  – Yahoo Mail
	  – Telstra Mail (Bigpond)
		• Help to keep a record of communication
		• Have a number of formatting options, including adding dot points and emphasis to text
		• Usually free to install and use
		• A range of documents and files can be attached to the email
			• Require internet access to send and receive messages
			• It is often unclear whether the message has been received and read
			• Messages may be undeliverable if the email address is incorrect or if attachments are too large

Text messages sent via SMS	• Messages may be targeted to individuals or groups • Suitable for sending short messages • Messages may be sent from any mobile phone to any other mobile phone	• Can be used to send links and small attachments • Allow you to track a conversation • Messages are generally more instant, as they do not require users to be logged in to an account	• Usually a cost involved • It is often unclear whether the message has been received and read • Older mobile phones may not be able to receive certain types of messages (such as pictures or videos sent as attachments)

Type of application	Features	Strengths	Limitations

Text messages sent via messaging apps	• Messages may be targetted to individuals or groups
	• Suitable for short messages
	• Common messaging apps include:
	  – Apple iMessage
	  – Facebook Messenger
	  – Google Hangouts
	  – Jabber
	  – WhatsApp
	  – Yahoo Messenger
		• It is often clear whether or not the message has been opened and read
		• Can be used to send links and small attachments
		• Allow you to track a conversation
		• Useful for group messages, where multiple people can be involved in a conversation
		• Usually free to install and use
		• Messages are generally more instant, as they do not require users to be logged in to an account
			• Require both the sender and receiver to have the correct app installed on their system
			• Usually require internet access to send and receive messages

Video calls via messaging apps	• Provide 'face-to-face' communication between people in different locations
	• Can be used for video conferencing (e.g. where one or more people cannot attend a meeting)
	• Common video messaging apps include:
	  – Microsoft Skype
	  – Apple FaceTime
	  – Google Hangouts
		• Allow real-time communication
		• Enable users to see the other person's facial expressions, body language and gestures
		• Most apps enable typed messages as well as verbal communication
			• Require reliable internet access for both parties
			• Both parties need the correct software and latest version installed
			• Require everyone to be able to communicate at once – a conference call may need to be arranged in advance
			• Require all users to have hardware such as a microphone, speakers and camera

Internet-based communication platforms

The internet provides a variety of platforms for communicating.

This includes real-time text chatting, voice over internet protocol (VoIP), web conferencing (webinars) and video conferencing. These enable groups of people to communicate via text, voice or video.

Internet-based communication platforms allow participants to contribute to discussions on an equal basis. Each participant types or verbalises comments that the entire group can see or hear. The text chat environment also allows a user to type private comments, viewable by only one other participant. It is also possible to exchange files with other participants.

Internet-based communication platforms may be used by:

- managers in various offices who are working together to implement a new record-management system for a national organisation
- colleagues in different states who wish to collaborate on a workshop to be presented at a national conference
- one or more students taking a class at a training organisation who wish to communicate with a guest speaker or trainer via the internet.

Participating in online meetings

As a participant in an online meeting, you may be asked for your views on issues, to provide an update of your progress on specific tasks or to participate in a general discussion about a particular work topic.

You can read all the views of others and contribute to the meeting at any time by posting comments until the chair decides that it is time to move on. Remember that comments appear in the order they are posted in, so conversations will not be grouped together.

Bear in mind that it is easy to be misinterpreted when posting typed comments because of the absence of visual cues such as gestures and facial expressions, so avoid jokes and sarcastic comments

Example — Conducting an online meeting

Staff at Larger Than Life have a meeting every three weeks to coordinate the marketing promotion for their client, Omega. This meeting involves advertising, sales and media staff in six different locations. The team uses Skype for Business to conduct their meetings. Each attendee has a web camera and microphone attached to their computer. They can see each other and speak freely over the internet. They can also share documents and links with other attendees. In cases where it is hard to clearly understand what is being said, they can type information that displays on the computer screens of the other attendees.

Team members can later print a transcript of any information that was presented during the meeting and use this to prepare the minutes of the meeting. The meeting can also be recorded and shared with other employees using a podcast function.

Online communication platforms

Online communication platforms such as social media and online forums can be used to communicate to the general public.

These types of programs may be commonly used in your organisation to promote products or services to new or existing customers, or simply to increase brand awareness.

Be aware, however, that with any form of online communication open to the public, it is very difficult to know how many people have access to it, and may be difficult (or even impossible) to erase once it has been uploaded. Ensure you follow policies and procedures when communicating information, particularly when you are representing your organisation on a public communication platform.

Some common online communication programs are outlined here, including strengths and limitations of each.

Type of online communication program	Features	Strengths	Limitations

Social media	• Can be used to communicate short messages (or posts) to a large number of people
	• Common social media platforms include:
	  – Twitter
	  – Facebook
	  – Instagram
		• Can be used to reach a large number of people
		• Posts may go viral, increasing the spread of the message
		• May be used for one-on-one communication as well as public posts
			• Once content is uploaded it can be very difficult to erase as users may be quick to copy and share it

Blogs	• May be in the form of an online journal or feature article • May allow readers to comment on articles	• Have a number of formatting options, including adding emphasis to text and adding dot points	• If comments are turned on, these will need to be monitored to ensure appropriate language is used
Online forums	• Enable people to ask questions, and share ideas, thoughts and advice on particular issues • Messages on various topics can be categorised into threads	• Allow an open discussion of ideas and encourages contributions from the general public	• Less instant form of communication – it may take a while to receive a response • May require someone to monitor and moderate content on the site

Type of online communication program	Features	Strengths	Limitations

Podcasts	• Podcasts provide a way to distribute audio-video files across the internet
	• Podcasts are recordings that can be played through many different programs, such as:
	  – Windows Media Player
	  – QuickTime
	  – iTunes
		• Enable users to speak directly rather than having to type messages	• Require hardware such as a microphone, headphones and/or camera

Wikis	• Collaborative websites that allow users to add and edit content • Content is categorised	• Most wikis have a version control system so that if content is deleted, the page can revert back to a previous version • Enables you to search for content using key words • Encourage contributions from the general public	• May be difficult to track who the content has been written by, what the original content said or how it has changed over time

Online forum policy

The following is a policy by Larger Than Life on using forums to communication information.

Larger Than Life

Policy for the use of forums

- Be civil. Do not attack other participants personally. Respect other people's opinions.

- Keep it clean. Do not use any language that could be considered abusive, offensive, threatening or otherwise objectionable.

- Stay on topic. Ensure that your message relates to the forum that you are posting to. Off-topic conversation should be sent to relevant parties directly by email.

- Be kind to newcomers. Encourage them by providing guidance, responding to their questions and helping them to achieve positive outcomes from participating in the forum.

- Do not use material that could breach anyone else's copyright or other legal rights.

- Do not transmit any material that may contain viruses.

- Ignore spam on mailing lists and news groups.

- Do not add large attachments. If you have a large file that you would like to distribute, put it on a web page and include the URL link instead of attaching it.

Intranet versus internet

The internet is the global system of connected computer networks, while an intranet is an internal site that operates on an organisation's private servers.

It usually connects users in a business or learning institute, but may require a username and login so it cannot be accessed by others outside of the organisation.

An intranet is usually designed to provide information to a company's employees. It may serve as an online noticeboard or a system for storing organisational policies and procedures or other documents.

A company's intranet may look different from their public website, which is designed to provide information to others outside of the organisation, including customers and clients. Company branding, colours and format will often be chosen to make it obvious you are using a corporate, in-house tool. Here are some differences between the internet and a company intranet.

Internet

Although there is a wealth of interesting, valuable information on the internet, disadvantages include:

- Sites may have incorrect information.
- It takes time to find and download appropriate information.
- Some information may be carrying a virus.
- Some sites, online articles and posts may only be temporary, and you may not be able to find or access them a second time.

Intranet

A company's intranet may have advantages and disadvantages, including:

- Pages and links will only have correct information for your needs if updates are made regularly.
- Access can be limited to only certain departments of an organisation or specific staff.
- Downloading is faster as it is internally controlled.
- Information is generally safe from virus contamination.
- It doesn't have the breadth of information that's available on the internet.

Information-sharing tools

When you collaborate with others online, you may need to share electronic files.

File-sharing software allows you to upload any kind of file for use or review by others, including graphics, documents and spreadsheets. It is possible for users of the information-sharing tool to download and edit the files, and then re-upload them. It is essential that an appropriate tool is used to manage and record the edits to documents.

You can choose to allow others to only view files or to allow them to view and edit your files. Information-sharing tools such as Google Drive and Microsoft's SharePoint include a version control system that prevents people from undoing each other's work and also allows you to track changes to show exactly who did what.

Practice task 2

Read the case study, then complete the questions that follow.

Case study

Lee is responsible for word-processing the lengthy proposals that Larger Than Life develops for new advertising and public relations campaigns. His manager, Tobias, has been overseas meeting with clients for several weeks. Each day Lee and Tobias communicate using Skype, which allows them to talk to each other without the usual high charges for international phone calls. This means that Lee can speak to Tobias and get complete instructions without rushing through his questions in an effort to save money.

Question 1

Record potential positive or negative outcomes of using this method of communication.

Question 2

How else could Lee and Tobias undertake this task effectively?

Identify appropriate application in line with policies and procedures

Be aware of the systems and applications commonly used in your organisation to communicate electronically.

When determining the appropriate application you should use to communicate, you need to determine the available resources in your organisation. For example, you may wish to use Skype for Business to conduct video conferencing, but your organisation may only have a basic version of Skype installed or may use another video-conferencing system, such as Polycom.

Additionally, organisational policies and procedures may indicate that certain types of information must be communicated using a particular application. For example, your organisation may use a collaborative system such as Asana or SharePoint to send and receive files and communicate task requirements. If that is the case, you may be required to communicate all information regarding tasks (including meetings, progress and deadlines) using this system.

Refer to your policies and procedures or ask your supervisor if you are unsure.

Communicating in line with policies and procedures

When communicating online, there are specific conventions and etiquette you may be expected to follow.

Your workplace may have developed specific guidelines for you and other employees to follow when collaborating online. These guidelines may be included in your organisational policies and procedures.

The standards for communicating online vary from company to company. You will need to check your policies and procedures to ensure you are communicating effectively with others in the way the organisation expects you to, particularly when communicating with others outside the organisation.

Here are some common rules that may be outlined in a company's policies regarding online communication.

Emphasis

Avoid using capital letters and bold font to emphasise certain points. This may be considered rude and impolite. Instead, you can use italics to draw attention to certain information.

Privacy

Ensure you respect other people's privacy; for example, do not forward emails without their knowledge or give out email addresses and other contact information without their permission.

Replies

If you receive a message, you may need to acknowledge that you have received it, particularly if it is a request that you cannot follow up on immediately. If someone has provided you with something useful, such as information you have requested, thank them when you receive it. Always use the same polite behaviour as you would if you were face to face with someone.

Aggressive messages and criticism

Do not send aggressive messages, sometimes called 'flames'. Also be careful about criticising other people in messages. This is not ethical and, moreover, you cannot assume that you and the addressee will be the only people to read your message. Remember, digital messages are not strictly private as others may be included in the message that you were not aware of, or your message may be forwarded on to someone else without your knowledge.

Example

Email usage policy

The following example is an extract from Larger Than Life's email usage policy.

> **Larger Than Life**
>
> Email Usage Policy
>
> - Allow time for emails to be received and replied to, keeping in mind time differences around the world and other colleagues' busy schedules.
>
> - Do not send abusive or heated messages (flames). If you receive a flame, it is best to ignore it.
>
> - Don't assume any internet communication is completely secure.
>
> - If you are replying to a message, quote only the relevant parts.
>
> - If you want your message to be read, don't make it too long (i.e. no more than 100 lines).
>
> - Ensure the subject line reflects the content of the email.
>
> - Never send chain emails. Notify the system administrator if you receive any.
>
> - Immediately notify the system administrator or IT support person if you receive any suspicious messages that may contain a virus.
>
> - Remember that unsolicited email advertising is unwelcome (and forbidden in many countries).

Dealing with inappropriate behaviour

Your organisational policies and procedures will usually include information about what to do if you are being bullied, discriminated against or sexually harassed in the workplace.

These policies and procedures usually also apply when you are collaborating with others as part of your work role. Larger organisations and government departments are likely to have specific policies and procedures related to the inappropriate use of digital communication.

Unfortunately, you may experience some form of inappropriate communication, either posted publicly online or sent via a direct message or email. Ensure you follow your organisational policies and procedures in dealing with this situation. You may be required to contact the other party and tell them that their behaviour makes you uncomfortable and that you want the behaviour to stop. It may be appropriate to save the communication in a secure place so that you have a copy of it if you need to take further action.

Should the behaviour continue, or if the original behaviour was particularly threatening, abusive or offensive, you should advise your supervisor. Your supervisor will then be responsible for taking appropriate action.

Practice task 3

Read the case study, then complete the task that follows.

Case study

Your team has been asked to participate in an online meeting with employees from across the organisation to identify opportunities for improvements to work practices. Your team has a history of minor conflicts with members of the accounts department. Your supervisor is concerned that this conflict will emerge again. Your supervisor has asked your team to develop a set of guidelines for participating in online meetings, and ask other work teams to consider adopting.

Draft these guidelines.

Summary

- There are many different types of messaging applications, each with strengths and weaknesses.
- Online collaboration tools provide ways to communicate with other parties in real time by typing, voice and/or video.
- Always ensure you are following policies and procedures, particularly when representing the organisation on a public site.
- Do not post any personal information in a public site, such as your home address, phone number or personal email address.
- When you encounter inappropriate online behaviour, refer to your workplace policies and procedures for advice on reporting the problem and other actions you can take.

Learning checkpoint 1
Identify methods for digital communication

Read the case study, then prepare an email about it to be distributed to staff.

Case study

Your supervisor has asked you to help her coordinate next month's sales meeting. Her plan is to conduct the meeting with interstate sales staff online. She would like you to draft an email that she could send to participants that covers the following:

• the advantages of conducting meetings online

• how online meetings are conducted

• any tips that would assist participants to contribute most effectively to the meeting.

Remember to prepare a suitable subject line for your email.

You will need to refer to your workplace policies and procedures when drafting your email. If you do not have access to these documents, you may wish to refer to the various policies and procedures for Larger Than Life that you will find throughout this learner guide.

Topic 2
Implement procedures to send and receive digital communications

An organisation's policies and procedures will determine the computer programs and hardware you should use to send, save, record and retrieve digital communication.

Email is generally the preferred way to send and receive many types of business correspondence. However, your organisation might require you to use other applications for communicating certain information, such as using an online collaborative program to communicate task progress and requirements.

Make sure you identify and use the correct application and follow correct processes as outlined in organisational policies and procedures.

In this topic you will learn how to:

2A   Create and check outgoing digital communication
2B   Determine appropriate action in response to incoming communication

2A | Create and check outgoing digital communication

Digital messages such as emails are subject to the same laws as any other type of business correspondence and therefore must be prepared with care.

Emails and other forms of digital communication are very convenient, time-efficient and easy to send. However, you can easily make mistakes when sending messages. Always follow workplace procedures for sending emails and other messages.

For example, your organisation will expect you to prepare emails using appropriate language, tone and format. There are many different options and combinations, and you need to know what is expected in your workplace.

Correct email addresses are vital for sending emails successfully as incorrect addresses are not deliverable. The same goes for phone numbers and other contact details when sending other types of messages.

An email should include:

- the email address of the recipient
- a subject line
- a greeting
- the main body of the message
- the close of the message
- a signature
- any attachments (if necessary).

Here is some more information about different fields you may need to fill out.

To
The **To** field is where you insert the address of the person or people you wish to send your message to.

Cc
The **cc** field is where you insert the addresses of one or more people you want to send copies of the message to. Cc is short for 'carbon copy'. Your manager or supervisor may request to be cc'd on any important emails that you send, such as emails to suppliers or key clients. You may wish to check with your manager first.

Bcc
Most email software also includes **bcc**, which is short for 'blind carbon copy'. This means you can send a copy of the message to someone without the other recipients knowing. Your organisation may have a policy of using the bcc field to send one email to a list of recipients who do not know each other, such as a mailing list.

Accessing emails

If you are in a workplace you will need to access your email throughout the day to receive messages and to send messages to others, both inside and outside of the organisation.

It is common practice to sign in to your work email at the start of the day and to stay signed in until you finish working.

Your email software will generally notify you when new emails arrive. This may be via a pop-up at the bottom of your screen or by updating the email tab on your browser with the number of new (unread) messages. A message prompt can be useful if you don't check your email regularly, particularly if an email requires an urgent reply or follow-up. If you are using Microsoft Outlook, you can direct your email software to display a message using email options. To do this, select **File**, then **Options**. Select the **Mail** tab and update your preferences, as in the following example.
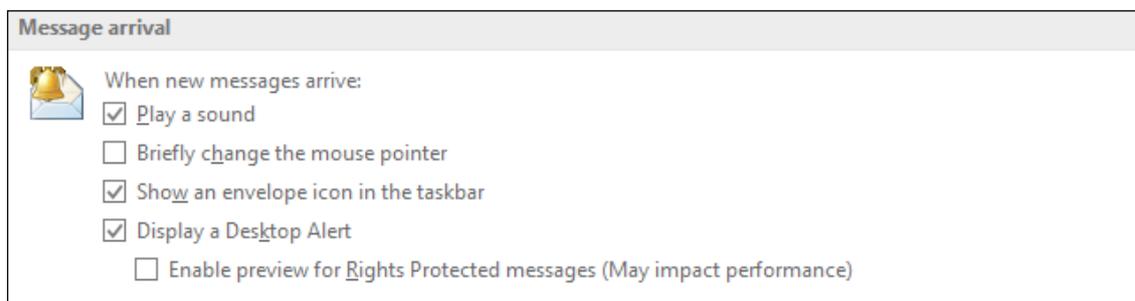
Incoming emails will show you the name of the sender (From) and what the email is about (Subject). The subject should clearly express what the message is about.

Internet service providers (ISPs) supply access to the internet, which is the network of computers and servers that pass emails on. Email software packages each have slightly different features. Some common email software packages include Apple Mail, Microsoft Outlook and Novell Groupwise.

Email addresses can be provided either for a fee through your organisation's ISP or through external email services such as Gmail.

All email addresses have a number of similar features and will be set out in the following way:

username@domainname.organisationtype.country

These are the features:

- The username is the name of the person whose address it is.
- An @ symbol separates the username and domain name.
- The domain name is the computer address, and is usually the name of the company, organisation or ISP.
- This is followed by the type of organisation; for example, .com (commercial organisation), .org (non-commercial organisation), .edu (educational institution) or .gov (government department or agency).
- Sometimes email addresses include a two-letter country code at the end, such as .au (Australia), .se (Sweden), .uk (United Kingdom), .de (Germany) and .nz (New Zealand). However, United States email addresses do not include a country code.

Webmail

Webmail is a server-based email system that allows employees to access their email account from the internet.

You can send and receive email messages from almost any computer that is connected to the internet. This means that if your organisation offers webmail, you can log on to your email from a location other than your workplace. The webmail application and your email messages exist on a remote server, not your local computer.

Your webmail application will contain its own built-in help file that will guide you through the process of setting it up to read email on a remote server. If you need specific information during setup, such as the names of your incoming and outgoing mail servers, contact your workplace website administrator.

Webmail is based on hypertext mark-up language (HTML). This means that you can use any major internet browser to access your emails. Additionally, your email is stored on your domain's server. Therefore, you can save emails and attachments on the server instead of downloading them to your computer.

Advantages of webmail
• Only your domain account name and password are required to use webmail.
• It is accessible from any internet-connected device.
• It uses very few of your computer's system resources.
• It functions through any web browser and operating system.

Health and safety policies and procedures

Health and safety policies and procedures encourage you to retain good posture while working at your computer.

An ergonomic workstation will help you achieve the correct seating posture for back support, keeping your eyes, neck and spine aligned and supporting your feet and lower back at all times.

Ensure you have set up your workstation correctly so you can reach your keyboard easily, including positioning your:

- chair
- mouse
- keyboard
- wrist supports
- desk.

To meet ergonomic requirements, you may need to:

- raise your chair to the correct level and use a foot support to reach the floor, if necessary
- set your screen at the right level and angle for your gaze
- take regular breaks to stretch and stand up
- rest your eyes from time to time by looking at various objects that are close by and further away.

It is also important to ensure your equipment is in good working order. In addition to meeting ergonomic requirements, you should also:

- avoid using any electronic item that has faulty cords, or that is incorrectly placed and could fall
- keep your work area free of clutter
- avoid eating or drinking while at your workstation.

Practice task 4

For the following scenarios, identify and record the type of electronic communication that you believe should be used in each situation.

Question 1

On a weekend, Claire needs to advise all staff that a meeting to be held at 8am Monday morning has been postponed.

Question 2

Ron is travelling to a sales expo in a regional town centre. He will need to check his email throughout the day. He has to schedule appointments with several clients during the few days he will be away.

Question 3

Farzin is completing a business course and needs to communicate with other students as they finish off a project that is due on Monday.

Question 4

Imranha arrives home and realises that she hasn't replied to an urgent email that was sent to her work email address.

Question 5

Marco has recently started work in a customer service department. He will need to access work-related messages from his desktop computer during business hours.

Question 6

Here are the subject lines of some emails Vanessa receives:

- Hello there!
- Meeting minutes 8 March
- Client query about prices
- You want to know this
- Canberra flight times
- Wow! What a result!
- Report for July sales
- A quick question
- Missing client address

Which of the subject lines tell her what the corresponding email is about?

Replying to and forwarding emails

You may need to reply to emails or forward them on to someone else.

To reply to a message, open or select it from the inbox. Select **Reply** to reply to the sender only or select **Reply All** to send a reply to all recipients of the original message.

The reply window is then displayed with the **To** and **Subject** fields complete. The original message is also displayed in the reply window, usually with 'RE:' inserted before it.

When replying to emails, you might want to include all or part of the original message in your reply. This can help recipients understand which parts of their message you are referring to. Depending on your email software, there are different ways to format the original email to make it stand out from your new email.

However, there may be instances when you don't want to include the original message. This could be because it:

- contains sensitive comments
- is too long
- includes unnecessary or irrelevant responses from several other contributors.

If you don't want to send the original message or you want to indent or attach a prefix in your replies, you can set your email accordingly. To do this, select **File**, then **Options**. Select the **Mail** tab, then scroll down to Replies and forwards and update your preferences, as in the following example.
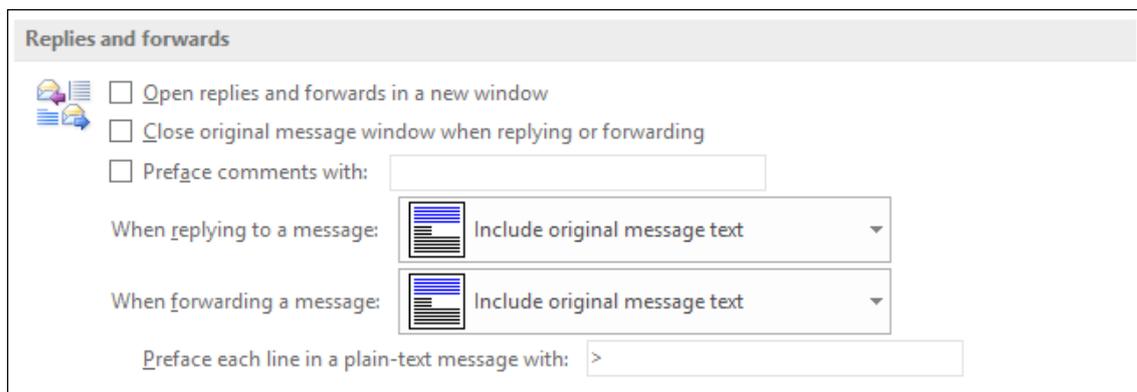
You may also wish to forward emails. For example, you might need to forward an email to your manager for advice when you don't know how to respond. You might also receive an email that others need to know about.

It's important to know who to forward emails to and when. If you are unsure about when it is appropriate to forward an email, or who you should forward it to, ask your supervisor or colleagues for help.

Checking contact information

Ensure contact details for sending emails and other forms of communication are correct.

For example, you may need to check email addresses, phone numbers or Skype names. Enter people's contact details into your system in a consistent way so the system can sort the information in an easy-to-find order. For example, enter a first name and last name for everyone, or only a first name for everyone; a mixture of both could result in some contact details being sorted under first name and some under last name. An electronic address book will allow you to quickly address your email without the need to type in the entire email address.

Find out the preferred place for entering and storing email addresses and other information. Some email systems give you a choice; for example, you may be able to enter email addresses into a contacts folder, address book or database. You may have one place for general email addresses and another for addresses relating to a specific project or department, customers or internal staff.

Check whether:
• every letter, symbol and number is correct
• you have selected the correct contact name and details
• the message is addressed only to the people who need to see it
• you have included all relevant people in the cc list (and no one who should not be there).

Subject line

The subject line should contain a brief description or title for your message.

This is one of the most important parts of an email. Ensure that your subject line accurately reflects what the email is about. You can send a message without filling in the subject line. However, bear in mind that an email sent without a subject line can also appear suspicious and some people may delete it as a precaution against a virus.

You should ensure subject lines are clear and precise. This helps your recipient make decisions about the importance of your message, and when and how to deal with it. A well-written subject line also makes it easier for both the sender and receiver to file the message and find it later.

In the following examples, note that the good subject lines describe the content of the email quite clearly.

Poor subject line	• Information
	• Task
	• Answer
	• Question
Good subject line	• Launch of email book
	• Annual report
	• Sales meeting minutes
	• Request to work at home

Drafting your message

Ensure that the greeting and content is appropriate for the audience and the purpose of the communication.

The type of greeting you use depends on who you are sending your message to and its purpose. It also depends on whether you are expected to use a formal or informal tone. For example, you may start an email with 'Dear Mr Harcourt' if Mr Harcourt is an important client you don't know very well, or simply 'Hi John' if John is someone you know well. If you are in any doubt, it is always better to use a formal greeting. A formal greeting is also better when the recipient may need to forward the message to someone else, such as their manager.

The main body of text contains your message. Sentences should be short and the meaning should be clear. Each paragraph should contain one idea only. You might need to include two or more paragraphs, but try to keep your message brief. Most people expect emails to be short and to the point. Text messages should be shorter still. If you need to include lots of information, it might be more appropriate to add an attachment containing the information instead.

Language and tone

Many organisations have policies or guidelines on the type of language they expect you to use when sending correspondence on behalf of the organisation.

The language you are expected to use in a professional email can include particular phrases, titles, terminology and greetings commonly used in your industry and organisation. You might be required to describe products using certain words, refer to people by their correct titles and departments, or end your emails with your organisation's standard signature. Find out what rules or conventions you are expected to follow when preparing emails. This may be specified in organisational policies and procedures.

Keep all the information you need to refer to handy; for example, a directory of staff names, titles and departments, or a list of commonly used acronyms and abbreviations.

Emails should be written in clear, plain English, using professional language. Your message will also be easier to understand if you use uncomplicated words, short sentences and simple language.

Remember the four Cs. Messages should be clear, concise, correct and courteous.

A concise message uses as few words as possible to convey the information. To write concisely you should:

- explain exactly what you mean
- avoid repeating yourself or using two words that mean the same thing
- ensure you don't distract the reader with unnecessary information.

Clear writing is easy to understand. It involves using simple words wherever possible. Sentences should be active, not passive. Active sentences put the subject (the person or thing that carries out the action) before the verb. Passive sentences put the object (the person or thing the action is being done to) before the verb. For example:

- The manager signed the contract. (Active)
- The contract was signed by the manager. (Passive)

Concise

Clear

Correct

Courteous

Writing correctly means following rules and styles for business writing. Your workplace may have a style guide, which describes the formatting rules used to make sure documents prepared across the organisation are consistent. Your organisation may require you to use particular phrases and terminology. Ensure that the information you have included is accurate, and that your grammar and spelling are correct. Your email program may have a spellcheck function – remember to use it.

Courteous writing is polite and respectful. It may involve thanking the person in advance or using 'please' to ask for something. Courtesy includes respecting people's privacy.

Some organisations expect you to write emails using formal language (a more serious tone). Other organisations may instruct staff to use a more casual or conversational tone when communicating with customers.

The use of language, tone and type of message all vary according to the purpose of the message and the audience. For example, if you have to tell an important client about a problem with a delivery, you would write a message using formal business language. If you want to invite staff to morning tea to welcome the new manager, you could send an informal email or text message.

Think about your purpose when you are choosing the tone of your message. Why are you sending the message and what are you hoping will happen as a result? Make sure your meaning is clear.

How you sign off (close) your message also depends on the purpose of the message and your audience. The close should match the formality of the greeting, such as 'Yours sincerely', 'Cheers' or 'Thank you'.

Your organisation is likely to have written policies about using offensive, sexist or racist language when communicating with others. Even if your organisation does not have these policies, you are expected to understand and comply with legal requirements relating to workplace standards. These may include laws about equal employment opportunity, bullying and harassment. A failure to use appropriate behaviour and language can result in a complaint and even prosecution.

Electronic signatures

Your electronic signature should contain your name and any other details your organisation wants to include, such as your job title and contact details.

Your organisation may have a set format for electronic signatures so that all staff project a consistent company image.

If your organisation doesn't have a set format for staff electronic signatures, you can set your own signature by following these steps.

With a new email open, go to the **File** tab, then select **Options.** Select **Signatures** on the right-hand side. Create a new signature by clicking **New**. Choose whether the signature is displayed for **New messages** and/or for **Replies/forwards**. Write the text for your signature, then click **OK.**

To insert your signature, go to the **Insert** tab, click the arrow under **Signature** and choose the signature you would like to use. You can also use this window to edit or remove a signature.
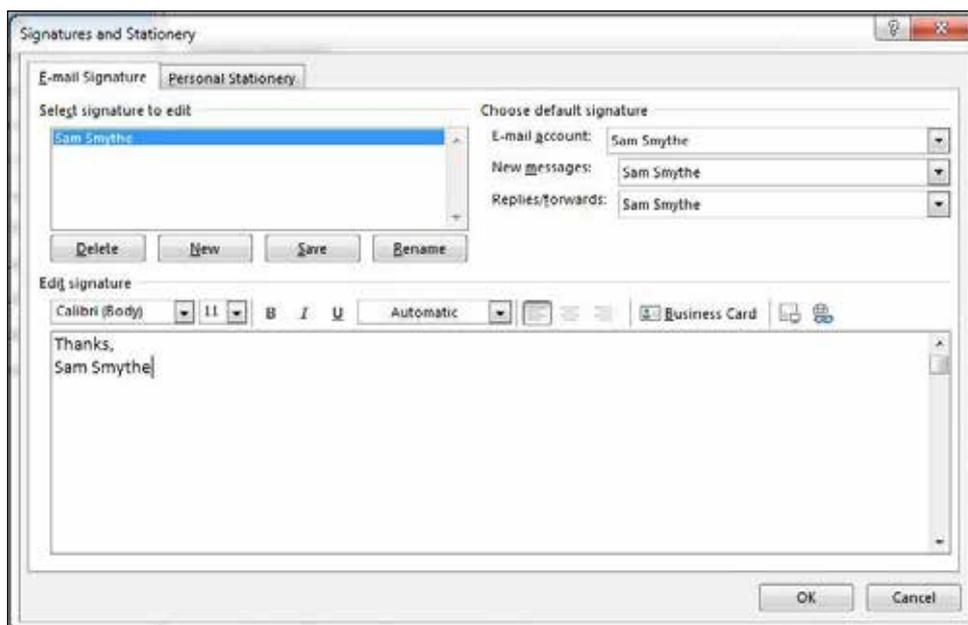
Checking your draft message

When you have drafted your message, check it to make sure everything is correct.

Proofreading is extremely important as once you have sent it, it is difficult to get your message back. You can make serious mistakes by sending messages without proofreading them first.

To check the spelling in Outlook, from your message window, select the **Review** tab, then select **Spelling & Grammar**. Follow the prompts throughout the text. In the following example, you would click the **Change** button to correct your mistake.
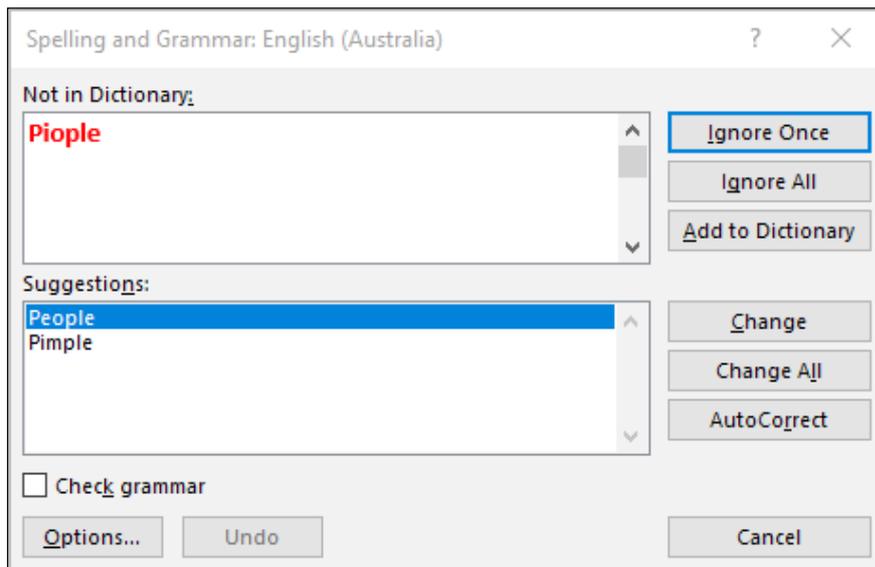
When checking the close and signature, ask yourself the following questions:

- Does the close match the greeting in formality and format?
- Does the signature contain all the necessary information?
- Will the recipient be able to contact the sender easily using the signature information?
- Is the signature in your organisation's required format?

Below is a list of checks to make before sending an email or other message, as well as examples of common mistakes that occur.

Checks to make

- Is the spelling, punctuation and grammar correct?
- Is the meaning clear?
- Is the text formatted correctly?
- Is the language concise?
- Is the information in the message correct?

Common mistakes

- Sending confidential information to the wrong person.
- Saying that an attachment is included when you have forgotten to attach it.
- Typing in an incorrect address so the message is undeliverable or goes to the wrong person.

Example

Email checklist

Here is an example of a checklist used by public relations firm Larger Than Life when composing and sending emails. The checklist is given to new employees to help them develop a professional approach to using email.

Larger Than Life

Email Checklist

Addresses

❑ Is every letter, symbol and number in the address correct?

❑ Does the recipient have more than one email address, and have you chosen the correct one?

❑ Is the message addressed only to the people who need to see it?

❑ Have you checked the cc list?

Subject line

❑ Does the subject line help the recipient understand what the message is about?

Greeting

❑ Is the greeting appropriate for the audience?

❑ Is the greeting appropriate for the purpose of the message?

Main body of the message

❑ Are the spelling, punctuation and grammar correct?

❑ Is the meaning clear?

❑ Is the text formatted correctly, either to a standard business format or to your organisation's required format?

❑ Is the information in the message correct?

❑ Does the email follow legislative and organisational requirements concerning privacy and confidentiality, ethics and anti-discrimination?

Close and signature

❑ Are the close and signature appropriate for the tone and purpose of the email?

Attachments

Attachments are documents that can be sent as separate files as part of a message.

Attachments could be pictures, word-processed documents or other electronic files. Emails are generally the most appropriate way to send attachments, as a large file or a number of small files can be attached to a single email. When you are attaching files to an email, your message should act as a covering letter, giving the recipient a brief description of what you have attached. Attachments should be clearly labelled so they can be easily identified, filed and retrieved later.

Some organisations have systems in place that will automatically reject emails with certain attachments. If you are having difficulty sending an email with an attachment, you may need to make a special arrangement with the receiver to forward the email via their IT department.

You should also be aware that attachments increase the total size of the message. This means it will take longer to send and receive the message, and it may not be able to be sent at all. You can find out the size of a file by locating the document icon for the proposed attachment through your browser or computer network. To do this, open the document, select **File**, then **Info**. You will discover a list of options relating to characteristics of the file. The size will appear under **Properties.**

If you need to attach a large file or a number of files to an email, consider these alternatives.

Divide

> Divide the message into a number of smaller messages. For example, if you are sending drafts of a large report, send each section in a separate email. Label your emails very clearly in the subject line; for example, 'Sales Report Section 1: Message 1 of 2' and 'Sales Report Section 2: Message 2 of 2'.

Reduce

> Reduce the size of large files by compressing them. You first have to check with the receiver that they have the software for decompressing them. There are many different applications available that compress and decompress files; for example, DropStuff and WinZip. It doesn't matter what you use, as long as the recipient has a program that can expand the files when they receive them.

Some organisations use different types or versions of software programs. For example, documents in Microsoft Word versions before 2007 have the extension .doc, while newer versions have the extension .docx. If a receiver says they are unable to open their attachment, check to see if this is an issue and, if necessary, resend the item saved in a different version of the software.

Attachments can also carry viruses. For this reason, some people don't like receiving them. Cutting and pasting the content of documents into the email itself might be a better way to send the information.

Sending messages on time

It's important for messages to be sent on time.

People rely on you to send information within the time lines they have specified. Some applications, such as email software, allow you to prepare messages in advance and specify the time when you want the message to be sent. When preparing replies to messages, find out when the information is required and plan your tasks accordingly.

Occasionally you might not be able to send or receive messages because of server, connection or other computer problems, either on your end or on the recipient's end. Such problems are beyond your control, but you should keep them in mind and plan your work carefully to allow plenty of time in case such events occur.

Practice task 5

Question 1

The following statements describe the content of a range of emails that you need to send. Record the information you would include in the subject line for each email.

a. You need to advise a client that they have an appointment next Friday at 11am to discuss refinancing their mortgage.

b. You wish to contact the maintenance supervisor regarding a broken handrail on the stairs at the entrance to the library.

c. You need to book a meeting room each Monday morning for the senior management meeting.

d. You need to ask all team leaders to advise you of which team members they have nominated to attend this month's safety training.

e. You need to distribute the most recent minutes of the health and safety committee meeting.

Question 2

Consider the following comment from a manager in a public relations firm: 'Sometimes I end up with several copies of the same email. It can be very time-consuming going through them all.'

If you were in this manager's team, how could you avoid contributing to the problem?

2B | Determine appropriate action in response to incoming communication

You have a responsibility to ensure that your email processes comply with your workplace policies and procedures.

This means that you must be able to identify and take appropriate action with regard to urgent, confidential, personal, suspicious or potentially dangerous emails.

Email programs offer a range of tools that allow you to effectively and efficiently manage your email.

An email can be marked with a symbol that provides you with some information. For example:

- An exclamation mark indicates the email is important or urgent.
- A flag indicates that some follow-up action is required.
- A paperclip shows there is an attachment to the email.

The symbols and the contents of the subject line will help you decide what to do next.

Prioritise emails

Ensure you deal with urgent emails first, according to what your organisation expects.

Urgent emails may be marked with an exclamation mark by the sender, indicating 'High Importance'. They may require you to carry out an action or respond to the email within a set time.

You may need to decide whether to forward the email to a colleague or manager for their attention or whether you can deal with it yourself. Let the sender know you have received their email, even if they are expecting you to forward it or take some other follow-up action. You can use your reply to tell the sender what you are going to do.

After you have dealt with urgent emails, you still have to prioritise your other emails. There may be a large number of them, depending on your job role. Some will be less relevant than others. For example, they may have been forwarded to everyone in the workplace unnecessarily or may be spam emails or junk mail.

Look at the subject line and who has sent the email to determine its importance. Open the most urgent and important ones first and take note of what they require you to do, replying if necessary. You may need to flag them for follow-up.

To do this, you can either click on the flag icon for the message or right-click the email and hover over **Follow Up**, then assign a follow-up date to it, such as tomorrow, next week or your own custom date. This will create a red flag icon and highlight the email in your inbox. Once you have dealt with it, click on the flag icon to change it to a tick.

Sending urgent and important emails

Email programs offer a range of tools you can use to alert the receiver that your email requires special attention.

You might need to send an email to a client about an urgent meeting request. In this case, you will need to mark the message as urgent. You can set a message to be of high, normal or low importance. Once you have drafted the email, you can set a follow-up date or change the importance to either **High Importance** or **Low Importance**. If neither of these are selected, **Normal Importance** will be assigned by default.
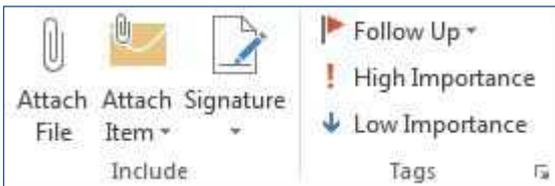
You can also change the sensitivity level of messages. For example, if you need to send an email to another staff member about their leave entitlements or salary conditions, you can mark the message as private, personal or confidential. This also prevents the message from being modified after it has been sent. To do this, select the arrow on the bottom right of the Tags section. This will open a pop-up window. Next to Sensitivity, choose **Normal**, **Personal**, **Private** or **Confidential**. You can also request a delivery receipt and/or a read receipt by ticking the appropriate boxes.

Viruses and malware

Computer viruses are easily transmitted through digital messages, especially in attachments.

They can cause significant damage to your device and your organisation's network, usually by corrupting files on a device they infect. You can even pass them on without realising. As soon as you open an infected attachment, the damage is done.

Viruses are a type of malware – malicious software designed to steal from or damage your computer. Other types of malware are listed below.

Different types of malware
• Spyware – software that steals internet usage data and sensitive information from your computer
• Ransomware – software that locks a computer system, or steals and threatens to distribute sensitive data unless a ransom is paid (ransoms can range from a few hundred to thousands of dollars)
• Adware – software that generates online ads on the user's system, usually as a pop-up or banner display
• Trojan horses – malware that fools the computer into thinking it is safe, but internally does damage to the system

Email services, including those offered by most internet service providers (ISPs), usually have some kind of virus filter protection for emails that are sent or received through them. Your ISP may send you information from time to time advising you of the anti-virus measures they are using. It is likely your organisation will also have anti-virus software installed on all computers. This software should be updated regularly to make sure it has the latest security measures in place.

There are many different types of viruses, and there's always a delay between when a new virus is created and when it can be successfully recognised and dealt with by anti-virus software. Sometimes you may receive an infected message before the anti-virus software has had a chance to develop a program to fight it.

To avoid information loss, you or your organisation should back up files regularly. This means that if a virus destroys your files, they can be replaced with an older, unaffected version.

Handling suspicious emails

If you see any suspicious messages or extensions you are not familiar with, don't open them under any circumstances.

You should be wary and suspicious of certain types of emails, which have any of the following characteristics.

Unknown sender

Treat all emails from an unknown sender with suspicion, especially if they contain an attachment, which may indicate a virus. Contact your IT support person before opening these types of emails.

However, some viruses can draw email addresses from address books and mail themselves out, so a recognisable source is no assurance that it isn't an infected email.

Email address

Some emails may appear to come from a known and trusted organisation, such as a bank. You should be careful of these, particularly if they ask you to click on a link or input your password. To check whether the email is genuine or not, look at the sender's email address. An address that contains a lot of random numbers or letters is not likely to be from a reputable organisation.

Subject line

Emails from a sender (either known or unknown) that have a subject line urging you to open the message immediately may not be genuine. Suspicious subject lines include 'Check this out – it's great!', 'You've got to see this picture!' or 'Congratulations – you've won!'

File extensions

Be careful of emails with attachments that have unusual file extensions rather than the common ones you would usually receive, such as .doc (or .docx), .xls (or .xlsx), .gif, .jpg and .ppt (or .pptx).

Ask your supervisor or IT helpdesk for assistance. Make sure your virus protection program is set to scan your incoming mail and notify you of any infection it finds. It's also good practice to undertake a virus scan of your entire computer system on a regular basis, just in case.

Do not open any files attached to an email unless you know what the files are, even if they come from someone you know and trust. Some viruses copy themselves and spread through email. Don't risk infecting everyone in your address book. When in doubt, always check with someone first.

Most viruses require you to open the email that contains them before they become active, so your best method of prevention is not to open any email until you're sure it's safe to do so.

If you suspect your computer has been infected by a virus and you have a virus protection program installed, immediately run a full scan of your computer. If you do have a virus, the virus protection program will advise you what course of action is required.

If you know the name of the virus, sometimes looking it up on the internet will provide you with useful information. As computer viruses become more complex and dangerous, prevention and protection become more important than ever.

If you receive any suspicious emails or attachments, you may need to take actions such as:

- deleting the infected file
- downloading a special file from the internet to remove the virus completely
- seeking professional advice
- advising your IT department or manager, in line with organisational policies and procedures.

Spam

Spam is unsolicited commercial or junk mail. It is similar to paper-based junk mail, such as a brochure or flyer.

Delete spam as soon as you identify it, or move it to your junk folder. Chain emails are also regarded as spam and you should not forward them on. The more spam you have in your inbox, the less effective your email system will be.

Spam may also include phishing scams, which are emails sent in an attempt to gain personal or sensitive information, such as usernames, passwords and credit card details. Be careful of any email that asks you to provide this kind of information, even if it seems to come from a reputable source, such as a bank.

Australia has anti-spam legislation in place. It prohibits sending unsolicited spam that has an Australian link. This includes spam sent by mobile phone as well as email. The law has stiff penalties with fines of up to $1.1 million for breaking it. However, some experts believe the law might not be enough to stop professional spammers from sending mass messages.

Setting security levels and filters for incoming communications

Your organisation is likely to have policies about how you are to handle incoming digital communication.

This will especially apply to emails that look suspicious or dangerous to the organisation. Some organisations will not permit emails to be received by multiple recipients. Most have restrictions regarding the size of the email, attachments and specific subject lines. For example, an email may not be delivered to your inbox if it has an unsuitable (blocked) heading such as 'Competition' or 'The Winner!'

Your organisation might have policies regarding attachments or may even block certain attachments or large files. You can discuss this with the appropriate personnel to have blocked emails or attachments released, if necessary.

You may be required to notify the IT person in the organisation, tell your manager or warn your colleagues of any possible virus-infected attachment that may have been sent out. If you have accidentally sent one to colleagues or customers, warn them not to open it.

Mobile device security

Organisations often have concerns about the security of email and other messages on mobile devices.

Your organisational policies and procedures may recommend methods you can use to reduce the risks, such as:

- adopting the same policies enforced for desktop and notebook personal computers
- limiting exposure by controlling and reducing the amount of data stored on devices
- using specialised software that allows information to be wiped from devices that are lost or stolen
- protecting your mobile phone or tablet with a password.
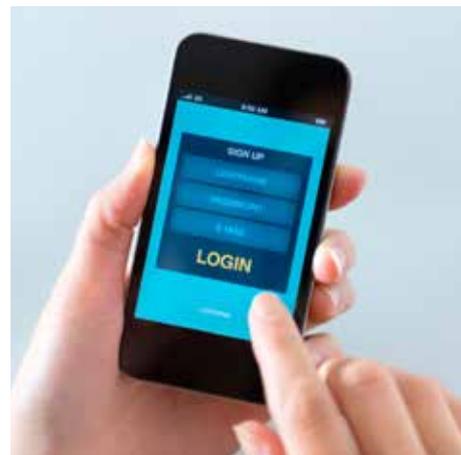
Individual filtering options

You have the ability to set your own filters for the emails you receive.

Depending on the email program you have, you may need to ask for help the first time you set these. Make sure you know how to take the settings off again for special situations where an email is accidentally prevented from coming to your mailbox. Check that you are able to do this with your supervisor or IT department.

For example, in Outlook go to the **Home** tab and click on the **Junk** drop-down menu, then select **Junk email options**. From the **Options** tab, you can select the level of filtering you would like for emails that your system thinks may be junk. You can select **No Automatic Filtering**, **Low** or **High**, or you can choose to only receive emails from people on your 'Safe Senders List'. All other emails will be sent to your junk folder.

Junk Email Options

Options | Safe Senders | Safe Recipients | Blocked Senders | International

Outlook can move messages that appear to be junk email into a special Junk Email folder.

Choose the level of junk email protection you want:

○ No Automatic Filtering. Mail from blocked senders is still moved to the Junk Email folder.

◉ Low: Move the most obvious junk email to the Junk Email folder.

○ High: Most junk email is caught, but some regular mail may be caught as well. Check your Junk Email folder often.

○ Safe Lists Only: Only mail from people or domains on your Safe Senders List or Safe Recipients List will be delivered to your Inbox.

☐ Permanently delete suspected junk email instead of moving it to the Junk Email folder

☑ Warn me about suspicious domain names in email addresses. (recommended)

OK | Cancel | Apply

Example

Receiving a suspicious email

One day at work, Claire saw an email in her inbox with the subject line 'ILOVEYOU'. She thought it had to be from her boyfriend. She was about to open it when she received a message from the IT helpdesk. It was warning everyone not to open emails with that subject line as they contained a very destructive virus. The email had been sent all over the world. Claire immediately deleted it without opening it.

Practice task 6

Research the various forms of virus protection that are currently available. Use the following table to record the name, features and other important characteristics of a virus protection program. Remember that different products may contain different features and you should briefly explain in plain language not only the feature's name, but also what this means in terms of protecting your emails and computer system.

Name:	
Available from:	
Cost:	
Support available: (after sales service)	
Features:	
Availability of updates:	

Tracking options

Unlike most messaging applications, you do not immediately know whether the recipient of your email has received it.

While you expect your email and internet services to be reliable, there may be server or connection difficulties that present temporary technical problems. For this reason, setting your email software to track messages can be very useful. You can then be confident the message has been received.

You can access tracking options by selecting the **File** tab and then selecting **Options**. Click on the **Mail** tab, then scroll down to Tracking. The following example shows the options for tracking.
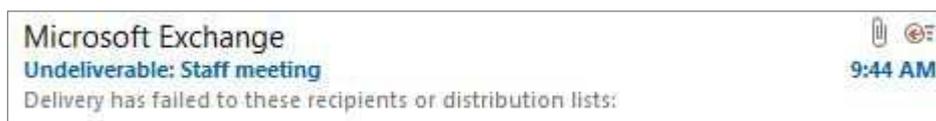
Undeliverable emails

Ensure that your emails have been received by the intended recipient.

You may have sent an important email, such as sending your resume to a potential employer, and wondered if the appropriate person received and read your email.

The receiver may not have read every part of the email, even though they opened it and you have received a return receipt. If you have communicated by email, you may have the responsibility to follow up its progress and outcome. For example, if a deadline is approaching and you have not received an expected response, the email should be followed up to check on progress. Ask your supervisor before taking this action.

Sometimes emails don't reach their destinations. These messages are 'undeliverable' or returned. Your email system can send you a message to let you know your message was undeliverable, as in the following example, which is marked with a return arrow. However, be aware that your email system might not send you such a message.

The most common reasons for an email being undeliverable are:

- the recipient's address was incorrect
- your server was temporarily out of order
- the recipient's server was temporarily out of order
- the email contained a file that was too large or not permitted by the recipient.

If you open the message, you will see which message was undeliverable and why, as in the following example.
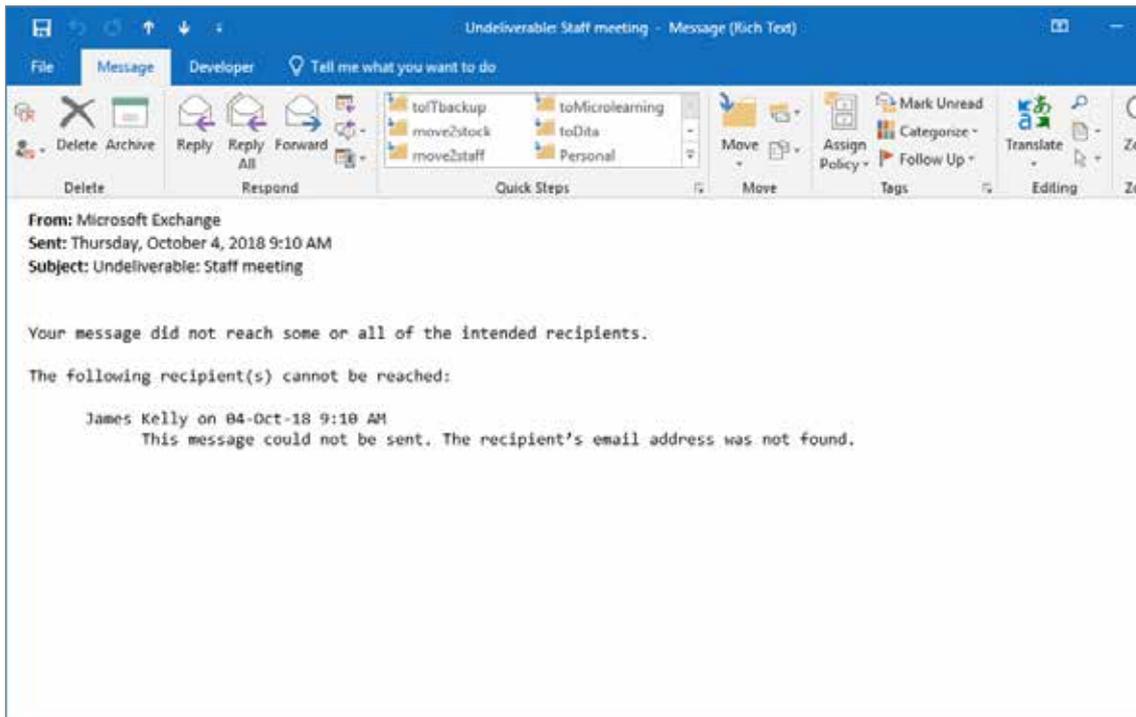
If an email is returned as undeliverable, the first thing you need to do is to check that you typed in the address correctly. It is very easy to make mistakes, such as putting a full stop in the wrong place or misspelling a name. If you used an old email address, you could call the person to check whether they have changed it. If you tried to send an attachment, check how large it is. If it is very large, the recipient's ISP might not accept it. You might need to divide the attachment into separate files or use software to compress the files.

Once you have checked that the problem is not with your organisation's email server, that you have the correct address and that you have not sent an attachment that is too large, try resending the email. If it is still undeliverable, contact the recipient for further information.

Personal emails

Ensure you are aware of your employer's policy on receiving and sending personal emails.

You may need to refer to organisational policies and procedures, or ask your supervisor for advice. Some organisations will allow you to send and receive personal emails during your breaks, while others will have a strict policy against the use of office technology for any personal communication (including email). These restrictions may have been established to reduce the potential of emails being received that include viruses, spam or other malicious content.

Many organisations have implemented procedures where they routinely review emails sent and received in the organisation. Remember, even if the email only seems to be addressed to you, it can sometimes be accessed and read by other parties. You should caution your friends against sending you emails that contain attachments or that use discriminatory, abusive or inflammatory language.

Privacy, integrity and confidentiality

Think about other people's privacy and confidentiality when forwarding messages.

The sender might have intended that only you read the message. They may not approve of you passing their message on to others. Think carefully before forwarding emails and other messages, as they can contain confidential information that is illegal to pass on to others, such as private information about a client. Sometimes you will need to ask permission from the original sender.

When you forward emails and other messages, never change the content of the original message. This is dishonest because you are not forwarding the true words of the original sender. Before you forward a message, check that the message is complete and includes all the necessary information.

Respect your organisation's policy regarding forwarding emails. Policies are likely to include not using your work email system to forward jokes, memes or other non-work-related information. Such messages quickly fill up your inbox, making it difficult to identify important work-related messages.

Disclaimers

You must be careful not to expose your organisation to litigation by disclosing any sensitive or confidential information in your emails and other messages.

A disclaimer is a paragraph of text that protects the organisation against liability should the message be misrepresented or received by the wrong person. It is designed to minimise legal culpability in the event of either of these problems occurring.

Sometimes legal and/or copyright information is included after an email signature. There may be a warning about the confidentiality of information included in the email. It is not possible to disclaim or foresee every possible type of damage that may occur. However, including a disclaimer does reduce the risk of harm. It also serves as a reminder that you should be careful how you word emails.

Here are two examples of disclaimers.

Disclaimer 1
This email is intended for the use of the addressee only and may contain confidential information. If you are not the intended recipient, you are hereby notified that any use or dissemination of this communication is strictly prohibited. The sender disclaims liability for any errors, omissions, viruses, loss and/or damages arising from using, opening or transmitting this email. If you have received this transmission in error, please notify the sender immediately, then delete this email.

Disclaimer 2
The information in this email and in any attachments may be confidential. If you are not the intended recipient of this email, you must not read, forward, print, copy, disclose or use the information in this email or any attachments in any way.

Practice task 7

Part A

Claire works at public relations firm Larger Than Life. The following table identifies a range of messages she has either received or been asked to send as part of her role. Using the table, identify the characteristic of the message and suggest actions for Claire to ensure she processes the email appropriately. The first one has been done for you.

Message	Type	Action
An email from a regular supplier identifying special offers on products that are available for that month.	*Work-related, not urgent*	*Follow your organisational policy regarding purchasing and advertisements. This may be to forward the email to an appropriate person for consideration, or to ignore and delete the email.*
A tender (quote) that is being sent to a client detailing the costs of a new advertising campaign.		

Email	Type	Action
A major client wants the managing director to contact her urgently.		
Email with the subject line: Improve your love life.		
Claire must send an email regarding next month's WHS meeting and confirm that all recipients have read it.		
Claire's friend has sent her a message with photos of a party they attended last week.		

Part B

Read the case study, then answer the questions that follow.

Case study

Robert is the managing director of Larger Than Life. He has spent a considerable amount of time preparing a proposal for a potential new client. He has prepared a document that includes images of the various methods (print advertisements, billboards and storyboards for television advertisements) that would be used to promote the client's products. The costs of the campaign are included.

Robert is tired and wants to go home. It is important that the members of the advertising and sales team receive the email and review the proposal before it is sent to the client in the morning. He quickly types in the email addresses of the six team members, and sends the emails with the attachment, then shuts down his computer and leaves.

When Robert arrives at work in the morning, he finds that several of the messages have been returned as 'undeliverable'.

Question 1

What factors could have stopped the emails from being delivered?

Question 2

Prepare a checklist that Robert could refer to when emails are returned to help him work out the reason.

Summary

- You will usually get a notification when a new email arrives in your inbox.
- Sort and prioritise your emails, and ensure you deal with urgent ones first.
- Handle urgent emails according to organisational procedures.
- Emails often require a reply, and may need to be forwarded on.
- Be careful of suspicious emails that might contain a virus or another form of malware.
- Emails with attachments from unknown senders might contain a virus and should be checked by IT personnel before they are opened.
- Spam is unsolicited commercial or junk mail. It should be deleted because it can clog up your inbox.
- When forwarding emails, take care with regard to the privacy and confidentiality of the original sender.
- Emails can be returned as undeliverable because the address was incorrect, the sender's or recipient's server was temporarily out of order, or files were too large or not permitted.

Learning checkpoint 2
Implement procedures to send and receive digital communications

Part A

Read the case study, then answer the question that follows.

Case study

Lyn receives an urgent email from a customer about the prices of the organisation's products. It requires a reply, but Lyn has to find out some details before she can answer. Once she has found the necessary details, she opens a new email and types in the address, the subject line and a polite note. Then she inserts an attachment that lists the product prices. The email is returned as 'undeliverable'.

List some reasons that could have caused the email to be undeliverable.

Part B

1. Over a period of two days, complete the following table showing details of:

    - the types of emails you receive, such as customer enquiries, information for staff, details about your tasks, potentially dangerous emails, advertising and personal emails

    - the number you receive of each type

    - the way you responded to each type, such as forward, reply, file, print or delete.

Type of email	Number of each type	How you responded

Type of email	Number of each type	How you responded

2.   Describe how you prioritise your email inbox. Explain why you do it this way.

3. Imagine you have a new person joining your organisation. Write some instructions about how to deal with messages according to your organisation's requirements.
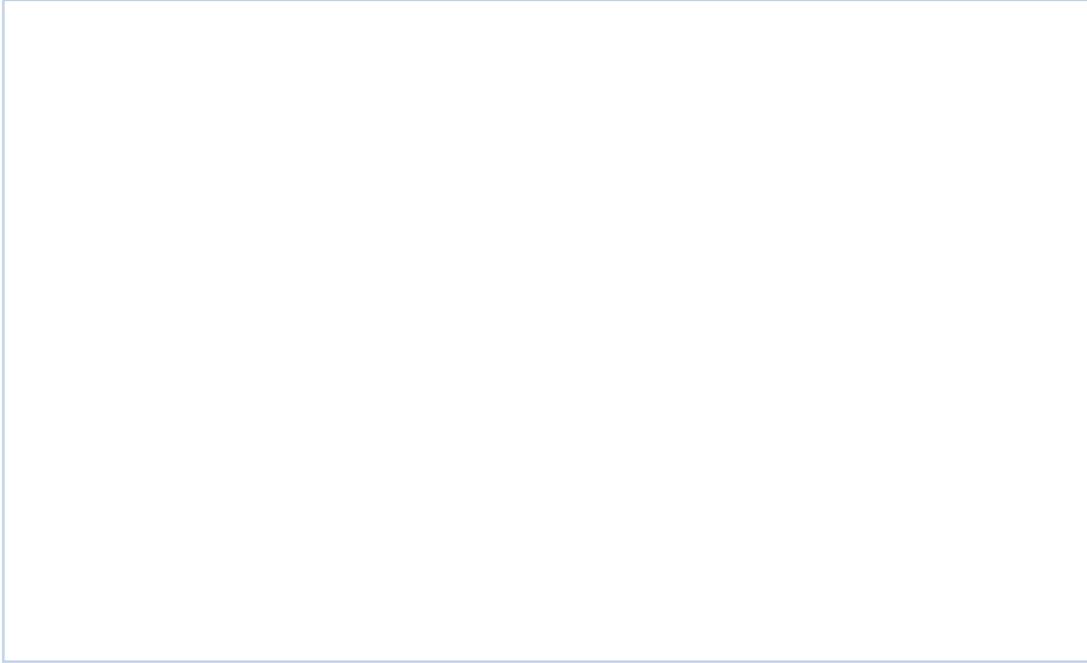
4. Write **four** useful tips that could be used to ensure that messages are received in a timely manner by the intended recipient.
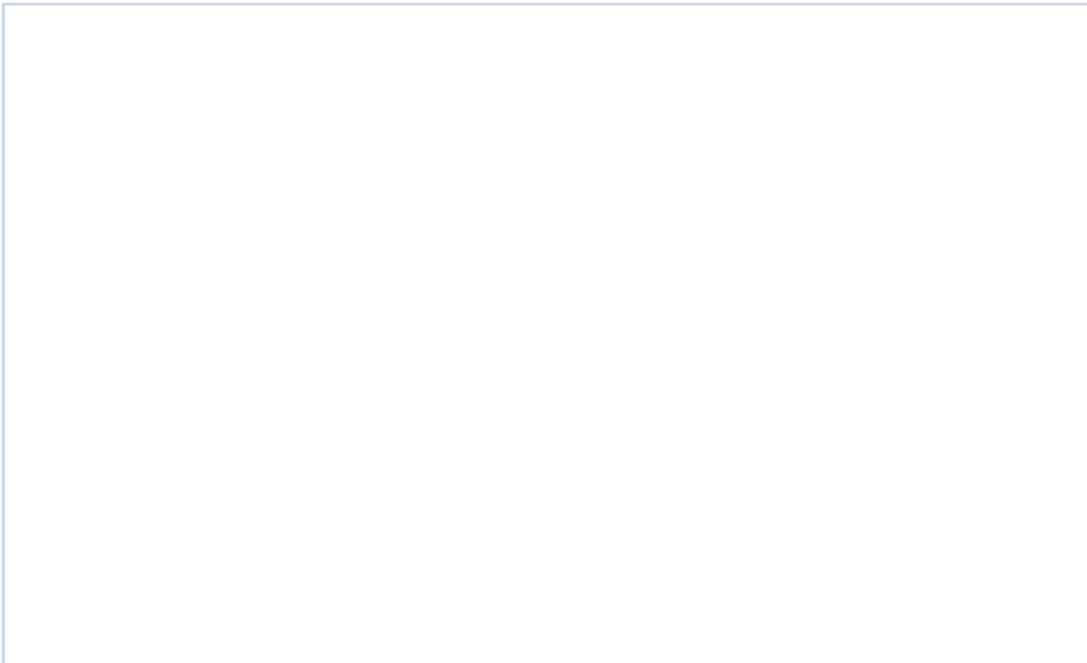
Topic 3
Manage digital communications effectively

You need to follow workplace policies and procedures to manage your digital communications effectively.

Good management of your emails and mailing lists is an important tool in working effectively and efficiently. For example, you may need to organise a range of folders in your email system that reflect the individual needs of your business and your specific role and responsibilities.

You also need to follow appropriate procedures to review your stored messages and to delete or archive emails and other communication.

In this topic you will learn how to:

3A   Create a plan for monitoring and maintaining digital communications

3B   Create methods for communicating electronically with stakeholders

3A | Create a plan for monitoring and maintaining digital communications

Most organisations have policies and procedures in relation to managing the large amounts of information being processed in the organisation.

Emails take up valuable space on your computer, particularly if they contain attachments. Eventually, the messages can slow down your computer, as well as the organisation's server. This means that applications will run more slowly and emails will take longer to send and receive. The more emails you have in your inbox and other email folders, the harder it is to find the one you need. For all these reasons, you should create a plan for monitoring and maintaining your digital communications.

Policies and procedures will guide you to efficiently manage your email inbox, which includes storing, archiving and deleting emails.

Organising your inbox

It is a good idea to organise your inbox to make it easier to find and retrieve emails.

For example, you may decide to sort your incoming messages by subject (in alphabetical order), by which ones are urgent, or by the time and date the emails are received.

To change the way messages are sorted in your inbox, click on **Filter** and hover over **Sort by**, then select an option. For example, you can choose to sort by date, subject or who the email is from. If you choose **Importance**, all the emails marked with 'High Importance' will appear at the top of your inbox. If you choose **Size**, the largest sized emails (usually ones with attachments) will appear at the top of your inbox.

Creating folders is also a useful way of sorting your email inbox. For example, you may create an 'Admin' folder for meeting requests and other general emails, and separate folders for particular projects and tasks. To create a folder in your inbox, simply click on the plus icon next to Folders on the left-hand side. This will create a new folder which you can label accordingly. To move emails into a different folder, you can simply drag the email over to it using your mouse. Alternatively, tick all the emails you would like to move to the folder, then click on **Move to** and select the appropriate folder from the drop-down menu. If you decide to delete a folder, ensure you have saved all the emails you still want to keep or moved them into a different folder.

You might also find it useful to classify emails according to type. The following table provides examples of different types of emails you may receive.

Administrative	These are emails that are received or sent by an organisation's employees and relate to the day-to-day business activities of the organisation.
Information with temporary value	You will encounter emails that have only temporary value to the organisation, such as: • meeting arrangements • staff movements • stationery requests • instructions to perform tasks • invitations • staff leave dates. You can usually use your own judgment and delete these emails if and when you believe they are no longer needed.
Spam	These are any unsolicited emails you receive that are not related to your work responsibilities. They should be deleted immediately.
Personal	Your personal emails can be deleted at any time. Personal emails could be related to lunch arrangements, jokes and private messages between employees and people from outside the organisation.

Practice task 8

Read the case study, then complete the task that follows.

Case study

Claire has established several folders to manage her email:

• Inbox
• Drafts
• Sent items
• Deleted items
• Planning notes
• Training and assessment
• Stock reports and ordering
• Omega project
• Personal

In the following table, identify the folder she should use to store each of the emails she receives.

Email	Folder
Notes for next month's health and safety committee meeting	
Email sent to sales staff	
Invitation to a friend's birthday party	
Stationery prices received from the supplier	
Conference details for Omega promotion	
Assessment task to be completed for her business course	
Spreadsheet of Omega budget	
Confirmation of travel arrangements for managing director to Omega conference	
Correspondence from her friend	

Storing incoming and outgoing messages

Emails may be regarded as legally binding documents and must be stored carefully if they contain important information.

Incoming emails can be recorded in various ways. A report can be printed or a mail register can be kept. What types of messages must be kept and where will depend on the organisation. For example, your organisational policies and procedures may state that messages are to be kept electronically, either in your personal computer files or in the central computer files. You may be able to delete routine emails confirming meeting times, but be required to keep a printed paper copy of those containing important information.

It's also a good idea to keep records of the emails and other messages you have sent, at least until you are sure the other person has received it. This means that if there is a problem with delivery, or if someone in your office needs to obtain a copy of correspondence after you have sent it, you will be able to find the message and resend it.

Important messages that have been sent or received (for example, confirming delivery costs or task requirements) can serve as a record you may need to refer to later, and should be filed accordingly.

Some organisations have policies and procedures to follow when storing emails and other messages. Many leave it up to the individual to make a judgment about what is important and what should be discarded.

Your organisation may also have guidelines for cleaning out inboxes, and copying and storing messages. For example, some organisations might insist that all staff keep the number of messages in their inbox to a maximum of 50 or may limit the total size of individual inboxes.

> **Email messages can be copied and stored:**
>
> - in your email program
> - in other software applications
> - on your computer
> - on a shared computer network
> - on USB drives, external hard drives or in cloud-based storage
> - in a filing system in paper-based form.

The following questions can help you determine if an email supports ongoing business and needs to be saved in the organisation's records management system:

- Did I receive or send this email in the course of my work?
- Does this relate to a project I am working on?
- Does the email require an action or response?
- Does the email provide advice or give a direction?
- If the answer to any of these questions is 'yes', the email should be saved in the organisation's records management system.

Monitoring and maintaining digital communications

You will need to develop a plan for monitoring and maintaining messages in line with policies and procedures.

You are likely to send and receive a high number of communications across the course of your day. These messages may be received and/or sent on a range of applications. You need to determine how you will keep track of what has been sent and received. To do this, you might find it useful to develop a plan or checklist of tasks to complete.

You will need to continually monitor incoming and outgoing messages throughout the day. Your plan may be a cyclical process, and may look similar to the following.

```
        ┌─────────────────────┐
        │   Check for any      │
        │  unread messages.    │
        └─────────────────────┘
   ┌──────────────┐        ┌──────────────────┐
   │  Download    │        │ Read and respond │
   │ and store any│        │  to all urgent   │
   │ attachments. │        │ messages first.  │
   └──────────────┘        └──────────────────┘
   ┌──────────────┐        ┌──────────────────┐
   │ Sort messages│        │ Read and respond │
   │ into appropriate       │  to remaining    │
   │   folders.   │        │ messages or flag │
   └──────────────┘        │  for follow-up.  │
                           └──────────────────┘
```
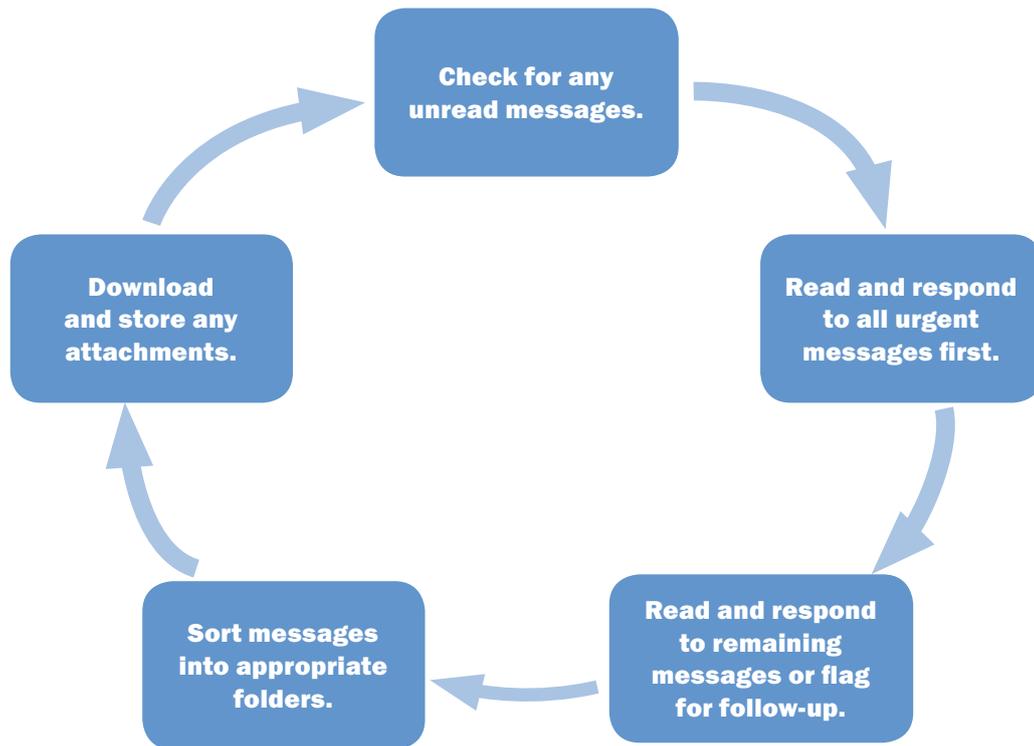
Legal retention periods

You may be required to retain information from emails and other forms of communication for a certain period to meet legal retention requirements.

These records must be:

- accessible for as long as required
- secure from unauthorised access, alteration and deletion
- linked to other relevant records that support the particular business activity.

The policies and procedures that relate to the retention and destruction of these records will be managed in the same way as all of the organisation's other records.

For example, organisations in the public sector, law and health industries have strict regulations that govern the retention of records, which could include those listed below.

You may be required to retain the following records:

- authorisations or instructions to other parties (such as a purchase order to buy new equipment or stationery)
- communications between employees relating to the operation of the business
- development or amendment of policies and procedures
- final versions of reports or recommendations
- formal communications with external organisations
- agreements or legal documents
- minutes and agendas of meetings
- submissions to external bodies
- provision of legal, medical or technical advice.

The legal retention period for email is the same as for printed communication in the organisation. Email transmissions may be subject to a range of legislation depending on the type of work performed in the organisation. The following provides an outline of this legislation.

Freedom of Information Act 1982 (Cth)

Provides a legal right for members of the public to have access to information held by public sector agencies.

Ombudsman Act 1976 (Cth)

Grants power to the ombudsman in a specific industry to request documents or other records relevant to any investigation they are conducting.

Electronic Transactions Act 1999 (Cth)

Provides a regulatory framework that facilitates the use of electronic communications as a way of entering into transactions.

Archiving emails

Archiving emails means storing them for a long period of time, usually in a safe location away from your personal computer.

Archived messages are kept for a variety of reasons. Sometimes messages should not be deleted as they contain important information that might be needed in the future. Some documents must be kept for a specific number of years, according to legal requirements. Archived messages can be stored on a computer server or other external storage device, or in a cloud-based application on the internet.

Once messages are archived, they can be retrieved or accessed from time to time as needed. You need to search for the message in its archived location. This may involve searching on an external hard drive, a computer server you don't normally use or a cloud-based application. The location of archived messages and the methods you need to use to retrieve them will vary according to the systems used in your workplace.

Because you often have to retrieve archived messages a long time after they were sent or received, the clarity of the subject line is very important. Imagine you have to find the message in a year's time. Would you be able to identify it from its subject line and know what the message was about? Always think about how easy (or difficult) it will be to retrieve messages when you archive them.

Policy for storing electronic communications

This is a policy that was developed at a museum about how workers should create and store electronic records of communication.

Email creation and management requirements

- Decide if individual email messages have value as official museum records.
- Archive official email records and delete them only in accordance with approved retention and disposal schedules.
- Respect the confidentiality of email records and the privacy of personal information.
- Protect email transmissions against unauthorised access.
- Protect email records against alteration and manipulation.
- You should retain the date and time of the email message, sender and recipient details, subject of the message, and any attachments to the email.
- Ensure the subject field is sufficiently descriptive about the content of the message to enable prompt identification of specific emails.
- Use folders based on function, subject or activity to manage email transmissions.
- Include an appropriate signature and disclaimer on all emails.
- For internal emails, the sender decides whether an email is to be included in the record-keeping system. For external emails, the recipient decides.

Deleting emails

You should regularly empty your inbox to keep your email system running efficiently.

If you are absolutely sure the email is no longer needed, delete it. To delete an email, simply select the email and click **Delete**. The message will then be removed from your inbox and moved to a **Deleted Items** folder.

If you want to permanently delete the email, select it in the **Deleted Items** folder and click **Delete** again. You will then get a warning: 'This will be permanently deleted. Continue?'

Remove all files from your **Deleted Items** folder regularly to ensure they do not take up room on the computer or server.

Different email software allows you to delete messages in different ways. For example, you can set up your email system so that messages are permanently deleted the first time or can choose to permanently delete all messages each time you shut down your computer. It is important not to move items to the Delete folder if an auto-delete setting is operational, unless you are absolutely sure you will not require them later.

Storing and deleting emails

Claire has just finished sorting her emails into various folders. Now the firm's IT officer has advised Claire that she has exceeded her mailbox limit. She thinks this could be because of the size of various attachments related to the Omega project. She decides it is time to review whether she needs to retain all of her emails. Here are the actions she has taken with a selection of her emails.

Email	Action
Notes for next month's health and safety committee meeting	Claire stores a hard copy in the WHS Committee folder, then deletes the email. The agenda has already been prepared.
Email sent to sales staff	She keeps a copy in the 'Sent' folder.
Invitation to a friend's birthday party	Claire records the details in her phone, then deletes the email.
Stationery prices received from the supplier	She stores a copy in the stationery folder, then deletes the email.
Conference details for Omega promotion	She saves a copy on her computer hard drive.
Assessment task to be completed for her business course	She prints out the assessment task to complete at home later and stores on a USB drive, then deletes the email.
Spreadsheet of Omega budget	She saves it on her computer hard drive, then deletes the email.
Confirmation of travel arrangements for managing director to Omega conference	She prints the information for Robert and saves an additional copy on the hard drive, then deletes the email.
Correspondence from her friend	She replies to her friend asking her to send emails to her personal email address in future, then deletes the email.

Practice task 9

Part A

Question 1

Why should you store or archive emails as soon as possible?

Question 2

Describe an instance when it would be important to print out an email and file it.

Part B

Read the case study, then complete the task that follows.

Case study

Manu is employed as a project officer on a large construction site. She is responsible for photocopying, opening and distributing mail, copying and distributing construction plans and recording information about the quality of the construction work that is completed on the site. Here is a list of emails she received several months ago.

Indicate whether Manu should archive or delete each item.

Electronic information	Archive or delete?
Unsolicited advertising material	
Quality inspection report	
Request for information required from the local city council	

Electronic information	Archive or delete?
Staff lunch barbecue last month	
Collection of money for Tom's gift	
Quote received from electrician	
Receipt for payment of WorkCover insurance	
Reminder for staff to attend workplace safety meeting	
Last month's stationery order	
Request to the Roads and Traffic Authority to close the road for construction work	
Thank-you note to staff from site manager	

3B | Create methods for communicating electronically with stakeholders

Occasionally you will be required to send a message to a group of people at the same time.

Different organisations arrange information in different ways. You need to know the various sources of contact information you are required to work with. For example, databases that are used specifically to record customer details and certain other pieces of information (such as follow-up dates or the account manager in charge of the customer) are referred to as customer relationship management (CRM) systems. By entering someone's details into a contact list, you can sort your contacts in a way that suits you, such as by business name or email address.

Creating and maintaining contacts

To create contacts, you will need to add names and contact details to an address book in your email system or messaging application.

Contact details may include:

- an email address
- a phone number for text messages and messaging apps such as WhatsApp
- a specific username for an application, such as a Skype username
- a username or email address for contacting others via social media, such as a LinkedIn name or Twitter handle.

The address book on most systems can contain additional information about each contact, such as phone numbers, job titles and a mailing address.

There may be multiple contact lists used in your organisation, such as the following:

- Global Address List – This contains all email addresses for users and work groups in your organisation. Only the system administrator can add new users to this list.
- Contacts – This is used to customise and store the email addresses of the business contacts you use.

To create a new contact group in Outlook, select the **Home** tab, then in the **New** group, select the **New item** drop-down menu. Select **More items,** then **Contact group**. Enter the contact details.

If your organisation uses a different email system and you are unsure how to set up a contact group, check your organisational procedures or ask a colleague or your supervisor for help.

Make sure you maintain the currency of your all contact lists by checking whether an address, phone number or username has changed and adjusting your records accordingly.

Tips for maintaining email addresses

- Remove old contact information from the system, either when someone gives you their details or when the person's contact details are no longer needed.
- Add new records as required.
- If messages are undeliverable, find out why. For example, is it a temporary problem with your organisation or the recipient's email server and should you resend the message at a later time?
- Regularly check folders, address books, distribution lists, databases and other records to make sure that contact details are correct, up to date and stored in the correct location.

When preparing contact groups, there are three key points to remember.

Correct spelling

Ask people to spell out details such as their name and email addresses slowly, and repeat the information back to them to ensure you have heard them correctly.

Consistent entry

Enter the contact details into your organisation's system in a consistent way, so that the system will sort the contacts in an easy-to-find order. For example, enter a first and last name for everyone, or only a first name for everyone. Don't use a mix of both, as this could result in some contacts being sorted by first name and some by last name.

Preferred location

Find out the preferred place for entering contact information – it could be a contacts folder, various contact groups, address books or a database.

Mailing lists

Most email systems allow you to set up mailing lists (also known as distribution lists), which contain groups of addresses under a single name.

Distribution lists make group emailing easy because you can send the same message to a group of people simultaneously. These might be kept in a database or spreadsheet document. Follow your organisation's requirements to create and maintain these lists.

You can set up your own address lists on your email system. Shared lists can be accessed by a number of people in an organisation.

For example, an organisation's staff address book may list all staff in the organisation, while the HR distribution list might contain only the names of staff who work in human resources.

The 'contact groups' function of email systems such as Microsoft Outlook allows you to send messages to groups of people at one time. You can use the lists to communicate internally with other staff and externally with customers, suppliers, distributors, agents and other stakeholders. You might also be required to set up distribution lists related to work projects.

Practice task 10

Find out how to send a group email with your email system at work, at home or in your learning centre. Write down the steps you would follow.

Summary

- Emails sometimes need to be copied and stored. They can be stored in your email program, on an external hard drive, in cloud-based storage on the internet or as paper copies.

- All emails and other messages should be organised and stored in appropriate locations, such as in email folders.

- Old emails should be archived or deleted to keep your email system running efficiently.

- Archived messages that must be kept, possibly for legal reasons, are stored away from your computer.

- Address lists allow you to store contact information about people. These lists help you to sort different groups of people to make communicating with them easier.

- Shared lists are contact details that can be accessed by a number of people in an organisation.

Learning checkpoint 3
Manage digital communications effectively

Part A

1. Explain the ways in which an email may not be private.

2. List some of the requirements an organisation is likely to have in place regarding emails that are sent to clients.

3. Describe the protections Australians have to prevent them from receiving spam. How effective do you think these are?

Part B

Read the case study, then answer the questions that follow.

Case study

Kris is always very busy at work and doesn't have much time to attend to her emails, other than those flagged as 'Urgent'. This is Kris's comment:

'The IT person at work is always telling me I have too many emails in my inbox, and to empty out my deleted items folder. I really can't see the problem. I like keeping the ones I haven't replied to because I'm so busy at work. I can't ignore the people who sent them. What am I supposed to do about it?'

1. Explain why the IT person in this case study might be concerned.

2. Explain what Kris could do to manage her email system better.