BSBITU203
Communicate electronically
Release 1

Learner guide

Aspire *learning resources*

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Communicate electronically

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Aspire Version 1.1

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Contact details

Participant	
Name:	
Start date:	
Phone number:	
Email:	

Work location	
Name:	
Address:	
Postal address:	
Workplace supervisor name:	
Phone number:	
Fax:	
Email:	

Registered Training Organisation (RTO)	
Name:	
Address:	
Postal address (if different):	
Phone number:	
Fax:	
RTO contact name:	
Mobile:	
Email:	

Contents

Before you begin

This learner guide is based on the unit of competency *BSBITU203 Communicate electronically*, 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.

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 and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies 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.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	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
Get the work done	• Recognises and responds to routine problems in context of own work

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1 Implement procedures to send and receive electronic mail	1A Log into email software	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Check outgoing emails	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Identify email characteristics	❑ Confident ❑ Basic understanding ❑ Not confident
	1D Deal with returned emails	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2 Manage electronic mail	2A Set security and filters for incoming email	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Create and maintain mailboxes	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Store emails and attachments	❑ Confident ❑ Basic understanding ❑ Not confident
	2D Archive or delete email information	❑ Confident ❑ Basic understanding ❑ Not confident
	2E Prepare and maintain electronic mailing lists	❑ Confident ❑ Basic understanding ❑ Not confident

... continued

Topic	Key outcome	Rate your confidence in each section
Topic 3 Collaborate online	3A Identify software used to collaborate	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Embrace netiquette in online collaborations	❑ Confident ❑ Basic understanding ❑ Not confident
	3C Respond to online posts or communications	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1
Implement procedures to send and receive electronic mail

Electronic mail (or email) has quickly become the preferred way to send and receive many types of business correspondence. Email offers organisations several advantages, including:

- low cost communication
- the sender does not need to know the receiver's geographic location when sending an email
- email is almost instantaneous
- files produced using a range of software can be attached to the email
- email can be retrieved 24/7 (twenty-four hours per day, seven days per week) depending on the receiver's situation
- communication can be sent to a large number of parties simultaneously
- hyperlinks can be included in the email for guiding the receiver to certain internet sites.

The computer programs and hardware used and an organisation's policies and procedures will determine how an individual employee sends, saves, records and retrieves emails.

In this topic you will learn how to:

1A   Log into email software

1B   Check outgoing emails

1C   Identify email characteristics

1D   Deal with returned emails

1A | Log into email software

When email first became available, to send and receive it you needed a computer, a modem to connect your computer to the telephone line, a telephone line, connection with an internet service provider and email software. The continuing innovation in communication technology means the number of methods that you can use to send and receive email is increasing. Wireless internet and hand-held communication devices are being introduced to workplaces at a rapid rate. It can be challenging for business managers to implement these new technologies and take advantage of the features they offer. This learner guide examines a range of the more commonly used email devices; however, you should endeavour to be alert to new and emerging technologies.

Work health and safety (WHS)

Remember to ensure you retain good posture while working on your computer. It is important to raise your seating to the correct level and use a foot support; set your screen at the right level for your gaze; take regular stretch breaks; rest your eyes by looking at various objects that are close by and further away; and blink regularly.

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

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

An ergonomic work station 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.

It is also important to ensure your equipment is in good working order. Do not use any electronic item that has faulty cords, or that is incorrectly placed and could fall. Keep your work area free of clutter. Don't eat or drink while at your workstation.

Email addresses

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

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. Look at the following email address:

username@domainname.organisationtype.country

The user name is the name of the person whose address it is; for example, your name. An @ (meaning 'at') symbol separates the user name 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 (a 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.

Check your email

You can check your daily email messages in various ways, depending on your workload and work habits. For example, if you organise a lot of meetings you might need to check emails regularly throughout the day. If you don't deal with a lot of people, you might only need to check your email once in the morning and once in the afternoon.

Incoming emails will show you the name of the sender (From) and what the email is about (Subject). The subject should be clear. Unfortunately, many people do not think carefully enough when they write in the subject line. This means you may not always be able to see what the message is about.

Your email software can notify you when new mail arrives. Sometimes an automatic warning message can be distracting and disrupt your work schedule. However, a message prompt can be useful if you don't check your email regularly, and a particular email requires an urgent reply. You can direct your email software to display a message using email options, as in the following example.

Reply to email

To reply to a message, you open or select it from the inbox. Click **Reply** on the toolbar to reply to the sender only. You could click **Reply All** on the toolbar to send a reply to all recipients of the original message, as shown below.

The reply window is then displayed with the To and Subject fields complete. The cursor is in the message area, ready for you to type in your reply. The original message is also displayed in the reply window.

When replying to email messages, 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 message to make it stand out from your new message.

Replies and forwards

Most people don't like to receive long email messages. So you should only include the original message if it is really necessary. There may also be instances when you don't want to include the original message. This could be because it:

- contains sensitive comments
- is too long
- includes responses from several other writers that are unnecessary.

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, as in the next example.
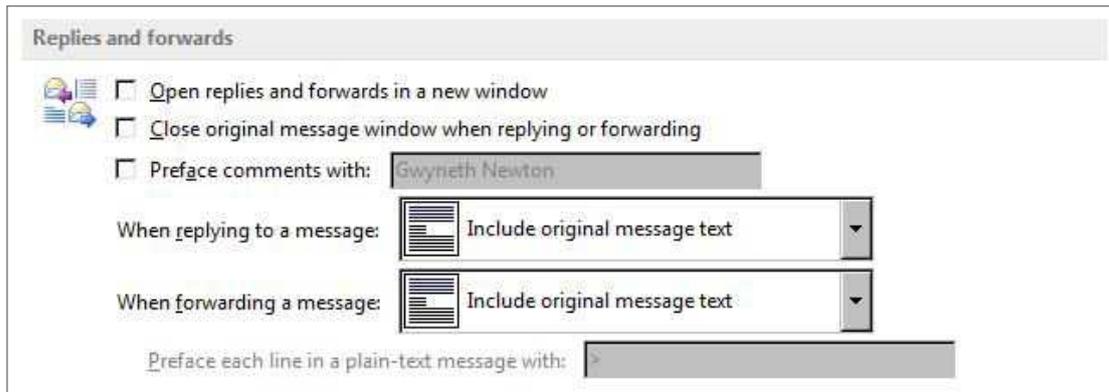
Mobile device applications

Mobile device technology means it is possible to access your email account wherever you are. All you need to get started is a tablet or 'smart' phone that provides access to email, and a mobile phone account or data plan that supports mobile mail. These devices essentially combine traditional mobile phone capability (voice and short message service, or SMS) with small hand-held computers that have numerous capabilities depending on the applications (apps) that are installed.

Wireless connection to the internet from a mobile phone can reduce telephone call costs and help employees use their time more effectively. It is important that you are aware of the costs involved in using wireless email. You should consider not only the software, hardware and connectivity costs, but also the operational costs.

There are many applications that allow people to communicate using smart phones and tablets, with mobile phones also offering the more traditional messaging services as outlined below.

Short messaging service (SMS)	Group messaging service
A feature that's available on most modern digital phones, enabling users to receive and send short text messages (from 150 to 160 characters) to other mobile phones. In order to send and receive SMS text messages, phone users usually have to pay a monthly fee to their service provider or a small fee for each message. Some companies even offer SMS texts free of charge. Text messages can also be sent through cloud-based services such as Apple's iMessage, Google Message or Skype.	A feature that's available on most mobile phones, enabling you to send an SMS text message from your mobile handset to a group of people simultaneously. It's a quick, simple and convenient way to communicate with a group of people without having to make contact with each individual.

Tablets

Tablets are mobile devices that combine the portability of smart phones with the advantages of a larger screen and the processing power of a small laptop. A tablet's capability will depend on the applications and operating systems it has installed.

From a business perspective, a tablet is basically a handheld computer with the following features:

- an on-screen keyboard that lets you type with the touch screen or a stylus
- the ability to connect to either WiFi or mobile broadband networks
- a wide range of applications that interface with the internet including email, mobile banking and calendars.

Tablets offer many features that make them a useful business tool for employees who need wireless connection to the internet and email.

Laptop computers, mobile telephones and tablets can be similar in functionality. Personal preference or experience with a device can determine which solution is chosen for work out of the office. As new technology is introduced to the office environment, it is vital that effective training is provided so that the organisation and its employees gain true value from the investment in any purchases.

Mobile device security

Organisations often have concerns about the security of wireless email. Your workplace 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.

Web mail

Web mail is a server-based email system that allows workers to access their email account from the World Wide Web. You can send and receive email messages from almost any computer that is connected to the internet. This means that if your organisation offers web mail, you can logon to your email from a location other than your workplace. The web mail application and your email messages exist on a remote server, not your local computer.

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

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

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

Internet-based communication platforms

The internet now provides a variety of platforms for communicating. Real-time text chatting was originally set up using an internet relay chat (IRC) protocol that provided a means by which one user could type a message in real time to one or more internet users. Almost instantaneously, the message appeared on the monitors of all the other users monitoring the transmission.

This technology is still in use, although more recent innovations include voice over internet protocol (VoIP), web-conferencing (webinars) and video conferencing (VC). Fundamentally, these are a shift from low bandwidth communication tools to high bandwidth tools that can share voice and video communications between individuals or groups of people.

Internet-based communication platforms allow participants to contribute to discussions on an equal basis. Each participant types comments or provides audio or video dialogue that the entire group can see or hear. Should the situation require it, 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.

Groups of people who may use internet-based communication platforms
• A government department may have managers in various offices who are working together to implement a new record-management system.
• Several managers in different states may wish to collaborate on a workshop to be presented at a national conference.
• A group of students taking a class at a training organisation may wish to hear a guest speaker via the internet.

Practice task 1

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

1. On a weekend, Claire needs to advise all staff that a meeting to be held at 7.00 am Monday morning has been postponed.

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.

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.

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

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

6. Here are the subject lines of some email messages 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?

1B Check outgoing emails

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

Email is very convenient, time-efficient and easy to send. However, you can easily make mistakes when sending an email. You need to take the same care when drafting and sending an email as you would do with any other written correspondence, such as a letter or fax. Always follow workplace procedures for sending email.

The date is automatically inserted into your email by the email program.

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

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.

Addresses

Correct email addresses are vital for sending email successfully. While addresses on paper-based mail need to be correct, a misspelt street name does not always mean your mail will be returned. With email, however, incorrect addresses are not deliverable.

Forward email

Similar to faxes, memos or letters, you can address your email message to one or more people.

In a workplace, there are many reasons why you should forward email. For example, you might need to forward it to your manager for help and feedback when you don't know how to respond to a particular message. You might also receive an email message that others need to know about.

You must know who to forward email to and when. Your colleagues will get annoyed if you clog up their systems with unnecessary or irrelevant email. On the other hand, they will be annoyed if you don't pass on an important message. If you are unsure about when it is appropriate to forward email, or who you should forward it to, ask your supervisor or colleagues for help.

Here is some information about what to enter into different fields in your email.

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'. Before you Cc any email, think carefully about whether the other recipients really need it. People in workplaces often complain they are receiving Cc messages unnecessarily. Be selective and consider your colleagues' or manager's work schedules.

Bcc
Some email software also includes Bcc, which is short for 'blind carbon copy'. This means you can send a copy of the message to someone (by typing their address in the Bcc field) without the other recipients knowing.

Example: forwarded message

The following example shows a forwarded message.
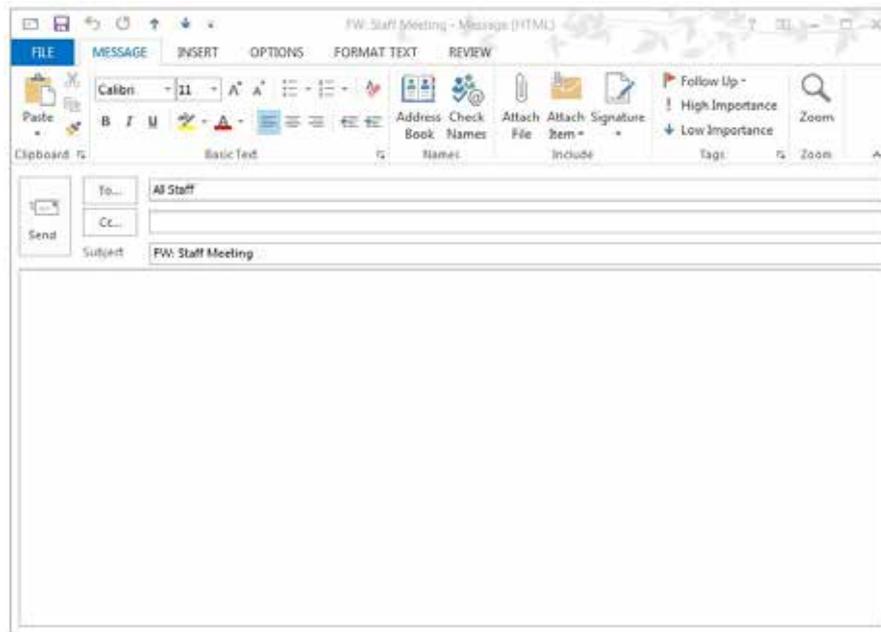
Tips for forwarding emails

When asking for a person's email address, get them to spell out their email address slowly and repeat the address back to them to make sure you have heard correctly. Some email addresses have numbers and other symbols in them.

Enter people's details into your email system in a consistent way so the system can sort the addresses in an easy-to-find order. For example, enter a first and last name for everyone, or only a first name for everyone, not a bit of both as this could result in some addresses 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 addresses. Some email systems give you a choice; for example, you may be able to enter email addresses into a 'contacts' folder, a variety of other folders, 'address books' or a database. You may have one place for personal addresses and another for addresses relating to a specific project or department, customers or internal staff.

Check whether:

- every letter, symbol and number in the address is correct
- the recipient has more than one email address, and whether you have chosen the correct one
- the message is addressed only to the people who need to see it
- you have checked the Cc list (the people you are copying the message to).

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 message. You can send a message without filling in the subject line, but this could frustrate the recipient. An email sent without a subject line can also appear suspicious and some people may delete it as a precaution against virus transmission.

You have already read about the importance of checking the subject line as a recipient. You should also make your own subject line clear and precise. It 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
- More work completed
- Sales meeting
- Answer

Good subject line

- Launch of email book
- Annual report 2015/2016
- Sales meeting minutes: 10 April 2016
- Answer to your query of 6 March 2016

Greeting

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 your email with 'Dear Mr Harcourt' if Mr Harcourt is an important client you don't know very well, or simply 'Dear 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.

You should consider the following questions:

- Is the greeting appropriate for the audience?
- Is the greeting appropriate for the purpose of the message?

Main body of the message

The main body of text contains your message. Sentences should be short and the meaning 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 email messages to be short and to the point. If you need to include lots of information, it might be more appropriate to add an attachment containing the information instead. You will read more about attachments later in this topic.

Language

Most organisations have written policies against using offensive, sexist or racist language. Many also have policies or guidelines on the type of language they expect you to use when sending correspondence on behalf of the organisation. The same rules that apply to printed correspondence can also apply to email correspondence.

Even if your organisation does not have written 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 sexual and other kinds of harassment. You have a personal responsibility to comply with requirements for appropriate behaviour in the workplace. A failure to use appropriate behaviour and language can result in a complaint and, if that is not resolved, eventually prosecution.

Language conventions

The language you are expected to use in a professional email (or other correspondence used in attachments) 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 messages with your organisation's standard signature. Find out what rules or conventions you are expected to follow when preparing emails.

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.

As with other forms of business correspondence, emails should be written in clear, plain English, using professional language. They should be short and to the point. Your message will also be easier to understand if you use uncomplicated words, short sentences and simple language.

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

Clear

Clear writing is easy to understand. It involves using simple words wherever possible. The 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

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

- explain exactly what you mean
- avoid repeating yourself
- ensure you don't distract the reader with unnecessary information.

Correct

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 in appearance. Your organisation may require you to use particular phrases and terminology. Always 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

Courteous writing is polite and respectful. It tends toward the formal unless you know the person very well. To check you are using courteous language, imagine that you are the receiver. Is this how you would like someone to communicate with you? Courtesy includes respecting people's privacy.

Tone

Some workplaces expect you to draft email messages using formal language (a more serious tone), just as you would in a letter. Other workplaces may instruct staff to use a more casual tone for email, similar to that used for phone messages or memos.

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 draft 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 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 of it? Are you trying to tell someone about an event? Are you asking the recipient to reply to your message? Make sure your purpose is clear.

Layout and spelling

The layout of your email should make the message as clear and easy to read as possible. Therefore, use the kind of layout you would use in a letter. Insert a blank line after the greeting, between each paragraph, and before the close and signature.

Spelling

To check the spelling, select the **Review** tab, then the **Spelling & Grammar** icon and follow the prompts throughout the text. In the next example, you would click the **Change** button to correct your mistake.

In the next example, you would click **Ignore** because the sales representative's name is correct. The spellchecker often queries names.

Close

If you have included a greeting, you should also include a close. How you sign off (close) your message depends on the purpose of the message and your audience. The close should match the formality or informality of the greeting. 'Yours sincerely' is a more formal close than 'Regards'. If your email message includes a request, 'Thank you' might be appropriate.

Electronic signatures

Your electronic signature should contain your name and any other details your organisation wants to include. This may be your job title and contact details. You need to provide enough information for the recipient to contact you easily. 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. You could also do this for your personal emails at home.

With a new email open, go to the **File** tab, then **Options**. Select **Signatures** on the right-hand side.

You can 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 edit or remove a signature.
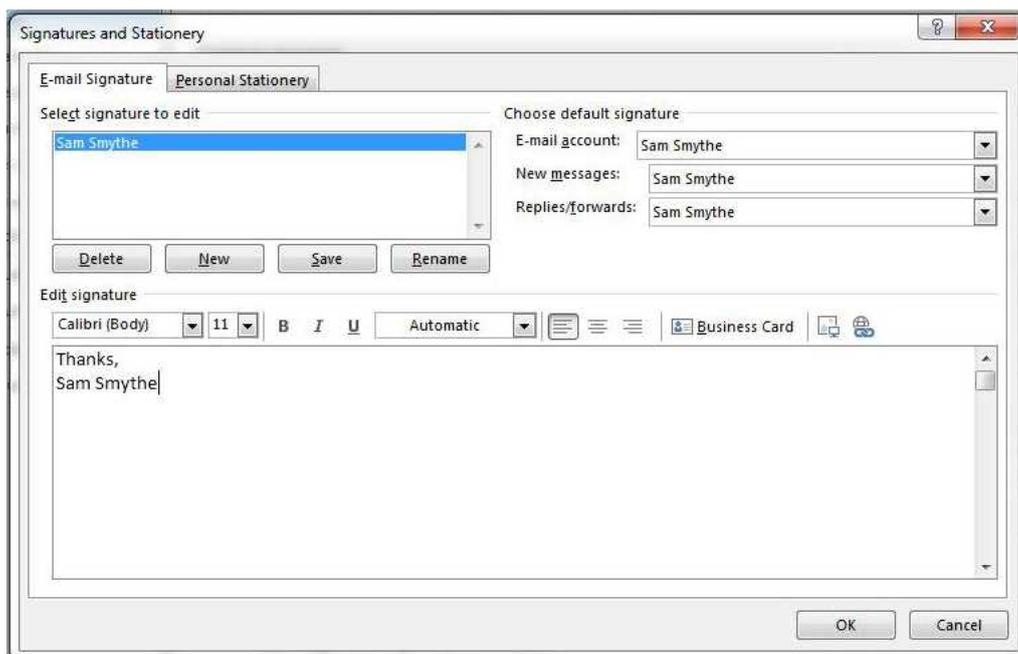
Check the close and signature

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; for example, telephone and fax numbers?

- Will the recipient be able to contact the sender easily using the signature information?

- Is the signature in your organisation's required format?

Check your draft

When you have drafted your message, check it to make sure everything is correct. Checking is extremely important, as once you have clicked the **Send** icon it is difficult to get your message back. You can make serious mistakes by sending email messages without checking them first. Below is a list of checks to make before sending an email, as well as some examples of common mistakes that occur.

Checks to make	Common mistakes
• 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?	• Sending confidential information to the wrong person. • Saying that an attachment is included, when you have forgotten to attach it. • Sending an email to an incorrect address, so the message is undeliverable.

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 the use of 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 principles?

Close and signature

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

Prepare attachments

Attachments are documents or other files that are attached separately to email messages. Sending attachments is one of the most convenient features of email. When you are attaching files to an email message, your message acts as a covering letter, giving the recipient a brief description of what you have attached. Attachments could be pictures, word processed documents or other electronic files.

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, it may be necessary to make a special arrangement with the receiver to forward the email via their IT department.

Be aware, however, that attachments are only useful if your recipient can open and read or view them. To send attachments successfully, you need to be sure the recipient has the necessary software or applications to open the files. Also, attachments can carry viruses. For this reason, some people don't like receiving attachments. In these cases, cutting and pasting short documents into the email itself might be a better way to send the material.

Attachments should be clearly labelled so they can be easily identified, filed and retrieved later.

Email file size

A short email message doesn't take long to send or receive. However, attachments increase the size of the email message, so it takes longer to send and receive. Be careful about the size of the attachments you want to send. You can find out the size of a file by locating the document icon for the proposed attachment through Windows Explorer (or your computer network). 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**, as in the following example.
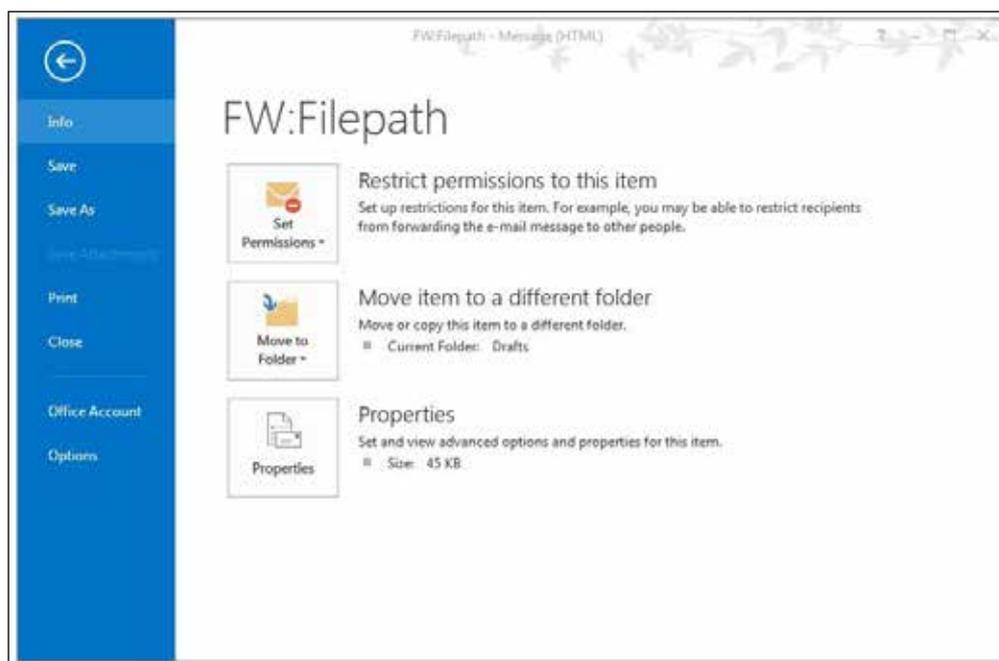
Email attachments

Self-executable files are self-contained programs that can launch, update or manipulate a file; for example, a virus update that updates the virus program running on your computer. Self-executable files are identified by the file extension '.exe' (for example, Microsoft Excel.exe). These files vary in size, so it is a good idea to check their size before attaching them to an email message.

Some organisations may use different types of spreadsheet programs, or different versions of a program. The most commonly used spreadsheet for general items is Microsoft Excel. However, there are different versions and data must be saved in a version the person receiving your email is running on their system. This also applies to Microsoft Word documents and, as new software is written, sometimes it is necessary to check the extension on the attachment. For example, documents in Microsoft Word versions before 2007 save as 'filename.doc' while newer versions save as 'filename.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.

If you need to attach a number of files or large files to an email message, consider two 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 message. Make sure you label your messages very clearly in the subject line; for example, 'Sales Report Section 1: message 1 of 3' and 'Sales Report Section 2: message 2 of 3'.

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 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.

Tips for email attachments

When you are preparing to send attachments, consider the following issues:

- Attachments take up space on the receiver's system. Some ISPs have a limit on the size of attachments they allow, so your attachments might be too large for the receiver.
- The receiver's computer may not have the capacity to open large files.
- Large attachments can take a long time to download.
- Portable Document Format (PDF) files are secure and can't be altered. The recipient must have Adobe Reader to open PDF documents.
- Printing costs for documents are transferred to the receiver, which might not be appropriate for some business transactions.

Send email on time

Email, just like other mail, must be sent on time. People rely on you to send items within the time lines they have specified. Some email software allows you to prepare messages in advance and specify the time when you want the message 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 email because of server, connection or other computer problems in your workplace or in the recipient's workplace. 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.

Send email on time

Practice task 2

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.

1. Advise client that they have an appointment next Friday at 11.00 am to discuss refinancing their mortgage.

2. Contact the maintenance supervisor regarding a broken handrail on the stairs at the entrance to the library.

3. You need to book a meeting room for each Monday morning in June for the senior management meeting.

4. Team leaders need to advise you of which team members they have nominated to attend this month's safety training.

5. Distribution of the most recent minutes of the occupational health and safety committee meeting.

6. Consider the following comment from a manager at Larger Than Life, 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?

7. Consider the following comment from another manager at Larger Than Life: 'I get a lot of email. Often there is just not enough time in the day to respond, so I do it at home after work. It takes a lot of time. I find it particularly irritating when there are emails that I don't need to see. Staff seem to use Ccs a lot just to cover themselves and this creates even more work.'

    What does the person in the second statement mean by 'cover themselves'?

1C Identify email characteristics

Email programs offer a range of tools that allow you to effectively and efficiently manage your email. In this section, you will learn about the various tools that allow you to identify important characteristics of the email that you receive and the methods you should follow to attach these same characteristics to the emails you send. 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 email.

Receive an urgent email message

You need to be able to identify different types of email messages and process your incoming email in an efficient and appropriate way. You also have to follow your organisation's procedures.

An email can be marked with a symbol: an exclamation mark, a flag or a paperclip. An exclamation mark indicates the email is important or urgent. A flag indicates that some follow-up action is required; that is, you need to respond in some way. 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.

You will have to deal with urgent email according to what your workplace expects. You will need to decide whether it should be forwarded to a senior person for their attention or whether you can reply to it yourself. Generally, an urgent email requires a reply. 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.

Prioritise email messages

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 workers receive hundreds of email messages every week. If you are on holiday or away sick, you may return to work to find your email inbox full of messages. Some of them will not even relate to your job. They may have been forwarded unnecessarily to everyone in the workplace. Some may be spam emails (unsolicited commercial or junk mail).

Look at the subject lines and at who the emails are from. After dealing with those marked urgent, decide which ones you think are important for your work. Open these next and take note of what they require you to do, replying if necessary.

Example: how other people deal with email

A group of people were discussing email at work. These were some of their comments:

Toby: I deal with a lot of customers by email. It takes up to two weeks for the customer to receive the product from the time they place the order. I reply to acknowledge the order. If we don't acknowledge the order, the customer goes elsewhere.

Saedee: I find that my response time depends on who the sender is. Messages from the director's office are often marked as urgent, so they usually expect me to respond straight away. If it is from a colleague, they are a bit more understanding.

Chloe: I usually respond to emails that need an urgent reply within a couple of hours. I still try to respond to all the others, but I can wait until I have more time available.

Send urgent/important email

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. 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. By default, the importance level in most email software packages is set to normal. Using the importance feature on the Outlook toolbar, urgent mail messages can be assigned a high level of importance.

You can also insert priority instructions by clicking the **File** tab and **Options**. Scroll down to **Send messages**. You can mark a message as either very important (click **High**) or not important (click **Low**).

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. Such labels are applied to a new mail message after it is created through the **File** tab and **Options**. To mark a message as private, personal or confidential, choose the **Sensitivity** drop-down list under **Mail** and select the appropriate option.

Flag mail messages

You can either flag messages as a reminder for yourself or you can flag them for others if you require follow-up action. You can also draw their attention to a message by flagging it For Your Information, Forward, Read and so on.

When flagging a mail message for someone else, you can also include a due date by which follow-up action is to be completed. After you have typed in the message, click on the **Follow Up** icon ⚑ on the Outlook toolbar before sending it, then **Custom**. The **Follow Up** box will be displayed. When the recipient receives the message, the comment you included is displayed at the top of the message.

You can flag a message for yourself simply by highlighting the message in the inbox with a right click of the mouse and selecting **Follow Up**. This command brings up the following shortcut menu and allows you to select similar options. You can also right click on the message to remove a flag.
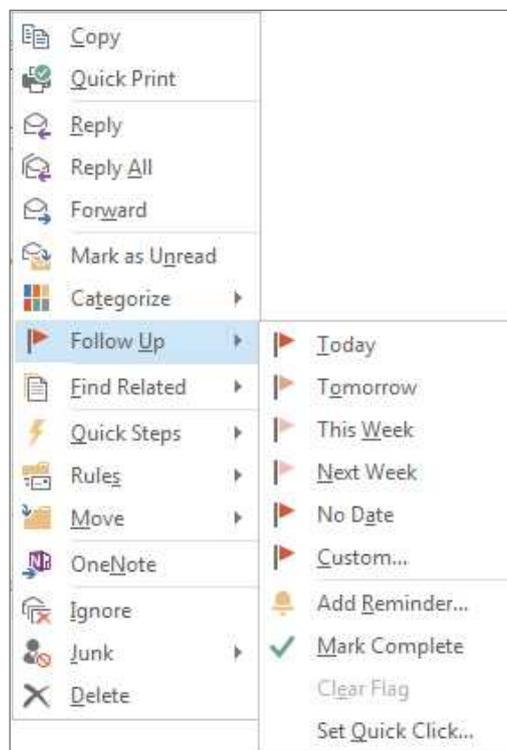
Tracking options

Unlike a phone call, you do not immediately know whether the recipient of your message is available or has received the message. While you expect your email and internet services to be reliable, there may be server or line difficulties that present temporary technical problems. Setting your email software to track messages can be very useful. You can then be confident the recipient has received and, in some instances, opened your message.

The following example shows the options for tracking:

Personal emails

You should discuss with your supervisor your employer's policy on receiving and sending personal email. Some organisations will allow you to send and receive personal emails during your lunch break or perhaps throughout the entire workday, 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 email being received that includes viruses, spam or other malicious content.

You should be mindful that many organisations have implemented procedures where they routinely review email processed in the organisation. You should consider any emails you send or receive as a postcard rather than a letter in a sealed envelope – they are not sealed and can be read by other parties. You should caution your friends and family members 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 an email. The sender might have intended that only you read it. They may not approve of you passing their message on to others. Emails can contain confidential information that is illegal to pass on to others, such as private information about a client. Think carefully before forwarding it. Sometimes you will need to ask permission from the original sender.

When you forward email, 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 the message is complete and includes all the necessary information.

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

Disclaimers

Sometimes legal and/or copyright information is included after the signature. There may be a warning about the confidentiality of the information in the email message. There are risks associated with using email. You must be careful not to expose your organisation to litigation. You mustn't disclose any sensitive or confidential information in your emails.

A disclaimer is a message that protects the organisation against liability (a situation where the organisation may have to pay damages) should the email be received by the wrong person or be misrepresented by someone. It is designed to minimise damage in the event of either of these problems occurring.

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 damage. It also serves as a reminder that you should be careful how you word email messages.

Example: disclaimers

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 receive this transmission in error, please notify the sender immediately then delete this email.

Disclaimer 2

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

Deal with your other email

You don't need to reply to every email message you receive – this can contribute to an unnecessary volume of email traffic. If you receive an email containing information only, you don't usually need to respond, especially if it was sent to a group mailing list. A group mailing list consists of multiple email addresses and is often used for newsletters and general updates.

Deal with suspicious or potentially dangerous email

Suspicious or potentially dangerous email messages can contain computer viruses or spam. You will learn more about applying security procedures to minimise or eliminate the impact of spam and viruses later.

Practice task 3

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

Email	Characteristic	Action
An email from a regular supplier identifying special offers on products that are available for that month.	Business related, not urgent.	Follow your workplace 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.		
A major client wants the managing director to contact her urgently.		
Claire has received an email with the subject line: Improve your love life.		
Claire must confirm that all recipients read the email she is sending them regarding next month's WHS meeting.		
Claire's friend has sent her an email with photos of a party they attended last week.		

1D Deal with returned emails

An important aspect of effective use of the email system is ensuring that your emails have been received by the intended recipient. You may have had the personal experience of sending an important email, such as your resume to a potential employer, and wondering if the appropriate person received and read your email. In this section you will read about the methods you may use to ensure that your email reaches the intended audience.

If something is very important, sending an email is not the same as 'communicating'. The receiver may not have read every part of the email, even though they did open it and you have received a return receipt. If a deadline is approaching and you have not received an expected response, the email should be followed up to check on progress. Your workplace supervisor's guidance should be sought before taking this action. If you have sent a communication by email, you have a responsibility to follow its progress and outcome just as thoroughly as you would if the communication had been via a telephone call or a face-to-face request.

Undeliverable emails

Sometimes email messages 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.

If you open the message, you will see which message was undeliverable and why, as in the following example:
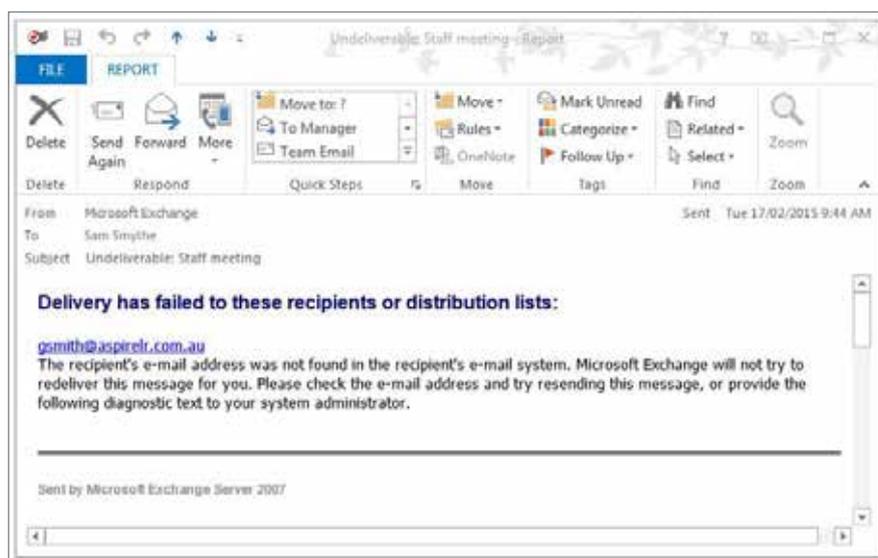
The most common reasons for an email being undeliverable are:

- 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.

Handle undelivered emails

If an email is returned as undeliverable, the first thing to do is 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.

When 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 a large attachment, try resending the email. If it is still undeliverable, contact the recipient for further information.

Practice task 4

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

Case study

Robert is the managing director of Larger Than Life, a public relations firm. Robert 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 asks Claire to insert the email addresses of the six team members (including the email addresses provided to him by two members for the time they are away at a sales seminar interstate) and send the email and attachment.

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

1. What factors could have stopped the email from being delivered?

... continued

2. Prepare a checklist that Claire could refer to when emails are returned to help her work out the reason or cause.

Summary

1. It is possible to get a notification when new email arrives in your inbox.

2. Sort and prioritise your emails and deal with urgent ones first.

3. Handle urgent email according to organisational procedures and whether it requires a reply, forwarding on or some other immediate action.

4. Suspicious or potentially dangerous email is email that might contain a virus.

5. Emails with attachments from unknown senders might contain a virus and should not be opened before being checked by IT personnel.

6. Spam is unsolicited commercial or junk mail. It should be deleted because it can clog up your inbox.

7. When forwarding emails, take care with regard to the privacy and confidentiality of the original sender.

8. Email 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 1
Sending and receiving emails

This learning checkpoint allows you to review your skills and knowledge in implementing procedures to send and receive electronic mail.

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 her 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 all the things that could have caused the email to be undeliverable.

Part B

Complete either questions 1 to 3 about receiving emails at your workplace, or questions 4 to 6 about receiving emails at home.

1. Over a period of two days at work, complete this table showing details of:

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

    - the number you receive of each type

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

Types of emails	Number of each type	How you responded

Part B

... continued

Types of emails	Number of each type	How you responded

2. Describe how you prioritise your email inbox. Explain why.

3. Imagine you have a new person joining your organisation. Write some instructions about how to deal with emails according to your organisation's requirements.

4. For a period of one week, complete this table showing details of:

    *   the types of emails you receive at home, such as personal, advertising and potentially dangerous emails

    *   the number you receive of each type

    *   the way you respond to each type, such as forward, reply, file, print out or delete.

Types of emails	Number of each type	How you responded

... continued

Types of emails	Number of each type	How you responded

... continued

5. Explain what guidelines you think would be necessary for people using email in a workplace. Give some examples of why the guidelines might be necessary.
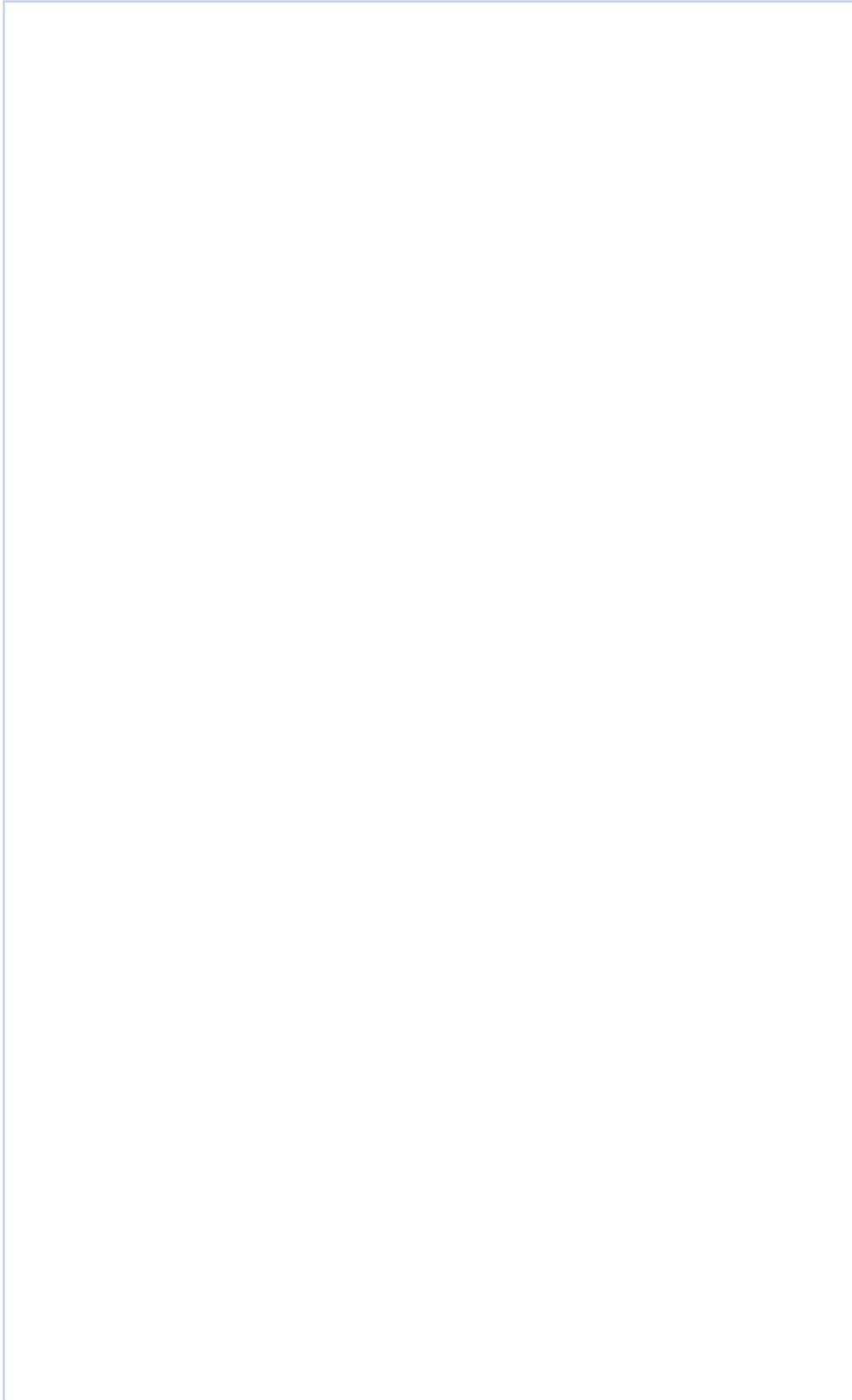
6. Describe your guidelines for using email at home; for example, do you prioritise your inbox? How do you avoid viruses and spam? Do you or your family or flatmates have any rules about how you use email?
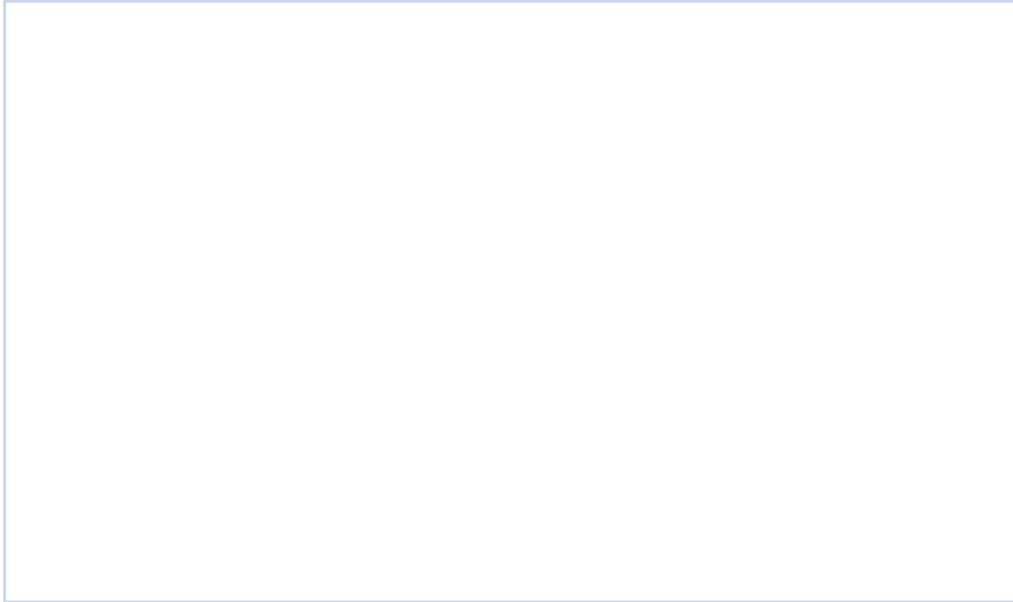
Part C

Develop a list of at least five useful tips that could be used to ensure that emails are received in a timely manner by the intended recipient.
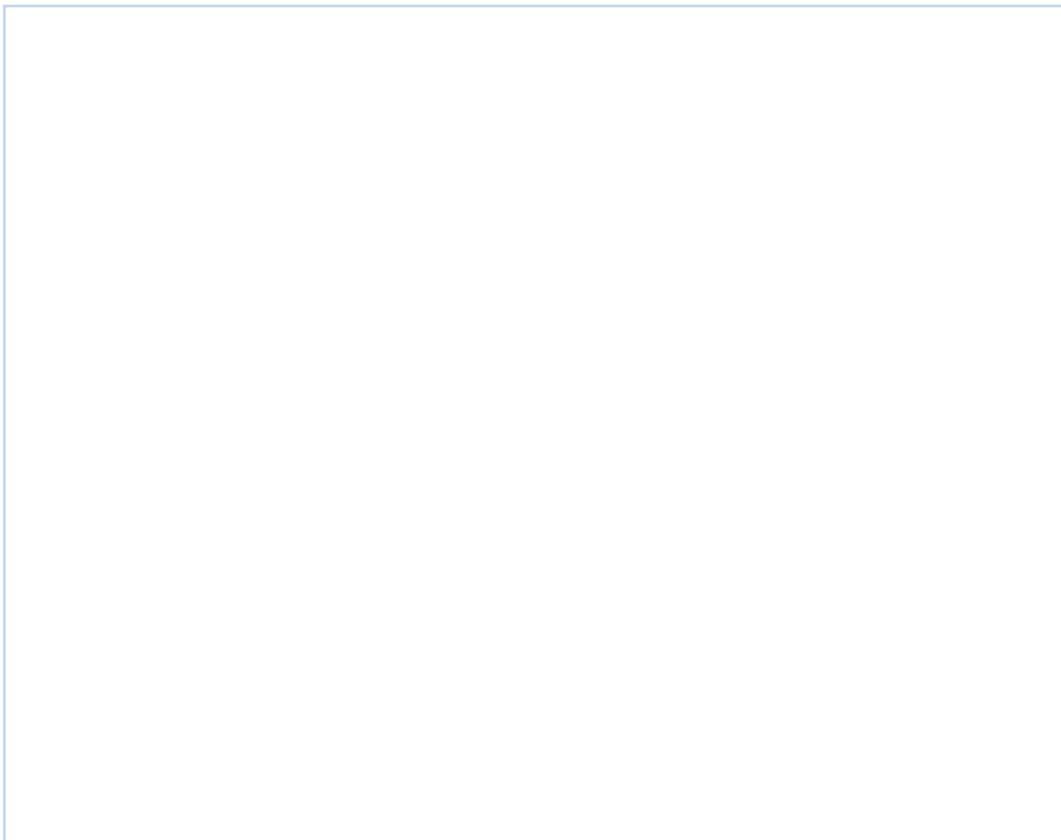
Topic 2
Manage electronic mail

As you have discovered, you need to follow workplace policies and procedures to manage your email. You may be required to organise a range of folders in your email system that reflect the individual needs of your business and your specific role and responsibilities. Good management of your email and mailing lists is an important tool in working effectively and efficiently.

It is important that you also follow appropriate procedures to review your stored email and to delete or archive emails.

In this topic you will learn how to:

2A   Set security and filters for incoming email

2B   Create and maintain mailboxes

2C   Store emails and attachments

2D   Archive or delete email information

2E   Prepare and maintain electronic mailing lists

2A | Set security and filters for incoming email

Your organisation will almost certainly have policies about how you are to handle incoming email. 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 topics. If you are expecting an email that is valid, it may not arrive if it has an unsuitable (blocked) heading such as 'Competition' or 'The Winner!' You can discuss this with the appropriate personnel to have the blocked email released to your computer in that instance.

You may be required to notify the information technology (IT) person in the organisation, tell your manager or warn your team members of any possible virus-infected attachment or spam that may have been sent to multiple email lists. If you have accidentally sent one yourself to colleagues, you must warn them not to open it.

Your organisation might have policies regarding whether you are allowed to open images that are sent to you as personal email. The network may block images or large files, whether they are just circulated jokes or offensive material. This means you will be unable to open them even if you try.

Viruses

Computer viruses are easily transmitted through email messages, especially in attachments. They can cause significant damage to your computer and your organisation's computer network. You can pass them on without realising. As soon as you open an infected message or attachment, the damage is done. So how can you identify suspicious messages and avoid infection?

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 have installed anti-virus software on your computer. The anti-virus software files are updated regularly to make sure they automatically scan infected files. Even so, there are so many of them that the filters can't detect them all, and there's always a delay between when a new virus is created and when it can be successfully recognised and dealt with by email filters. Sometimes you may receive an infected message before the anti-virus software has had a chance to develop a program to fight it.

Virus risk management

To avoid information loss, your organisation's network system will probably back up files on a regular basis. So, if a virus destroys your files, they can be replaced.

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

Unknown sender
Email messages from an unknown sender (although 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).

Attachments
Email messages from an unknown sender that have an attachment.

Subject line
Email messages from an unknown sender that have a subject line urging you to open the message immediately, such as 'Check this out – it's great!', or 'You've got to see this picture!'

File extensions
Email messages 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).

Handle suspicious emails

If you see any suspicious messages or extensions you are not familiar with, don't open them under any circumstances. Ask your supervisor or IT help desk 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 a friend or someone you know. Some viruses replicate, or 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.

What to do if you suspect your computer has been infected

If you suspect your computer has been infected by a virus and you have a virus protection program, immediately run a full scan of your computer. In cases where you 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 more dangerous, prevention and protection become more important than ever.

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 your workplace policy and procedures.

Spam

Spam is unsolicited commercial or junk mail. It is similar to paper-based junk mail. You don't ask for it, it clogs up your inbox and it is usually trying to sell you something. Delete junk email as soon as you identify it. Chain emails are also regarded as spam. Do not forward chain emails. The more spam people have in their inboxes, the less effective email is as a business communication tool.

Australia has anti-spam legislation. 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 able to stop professional spammers from sending mass messages. Delete all chain emails and junk emails and don't forward or reply to them.

Individual filtering options

You also have the ability to set your own filters for the emails you receive. Depending on the email receipt 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 may do this with your supervisor and/or your IT department.

For example, in Outlook:

- Go to the **Home** tab and to the **Delete** tool group.
- Select the **Junk** drop-down menu and then select **Junk email options**.

- Select the **Options** tab. You will see that 'No Automatic Filtering' has been chosen.

Changing the settings back to whatever is standardised is merely a case of reversing your steps. Further information on this function is available in the Help section of your Outlook program.
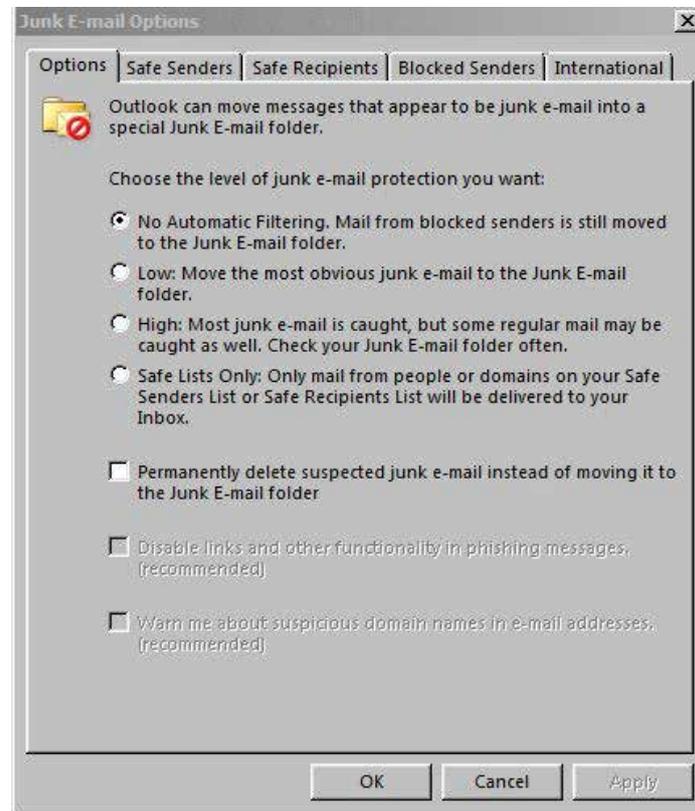
Report problems

Any questions you might have about your IT systems and email use are important. Email is such a vital tool in today's global workplace.

Silence about your concerns may result in major losses to the company from:

- computer 'downtime'
- information corruption
- transmission of viruses and potential litigation
- loss of reputation.

Example: email with suspicious subject

One day at work at Larger Than Life, a public relations firm, Claire saw an email in her inbox with the subject line 'ILOVEYOU'. She thought it had to be from her boyfriend. Great! She was about to open it when she received a message from the IT Help Desk. It was warning everyone not to open emails with that subject line. It contained a very destructive virus. The email had been sent all over the world.

Practice task 5

Research the various forms of virus protection that are currently available. On these tables, record the name, features and other important characteristics of two virus protection programs. 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:	

... continued

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

2B | Create and maintain mailboxes

Organisations have traditionally developed systems to store documents received in the mail. Filing systems have been developed to store copies of documents such as invoices, tenders and promotional materials. Increasingly, this type of correspondence is being sent electronically. It is important for an organisation to have policies and procedures that address issues related to managing the large amounts of information being processed in the email system.

These policies and procedures will guide you in the process of creating folders in the email program and help you to effectively and efficiently store, retrieve and action emails.

Copy and store emails

The first place to copy and store messages is usually your email program. Most programs allow you to create folders to hold messages you don't want to delete. Folders can relate to projects, departments or work tasks. Perhaps you prefer to create folders that have the same headings as the paper filing system. It is sometimes appropriate to store emails in more than one place. You can also separate personal emails from work emails.

Store attachments

Attachments come in many forms, shapes and sizes, and you need to know how to deal with each one. You can save attachments in other software applications. For example, someone might send you a spreadsheet of the latest sales figures, which you have to copy into your department's sales database. The way you do this depends on the requirements of your job, your organisation and the types of software programs you work with. You need to learn what your workplace requires in regard to transferring various forms of electronic information. Where you store messages and attachments depends on the file management practices of your workplace.

Organise your inbox

One method of prioritising and sorting your messages is to organise your inbox in a certain way. How you do this depends on the types of emails you receive and how they affect your work. 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 **By Date** at the top of your inbox, then choose how you want to sort your messages. For example:

- If you choose **Importance**, all the emails marked with High Importance will appear at the top of your inbox.

- If you choose **Attachments**, all the emails with attachments will appear at the top of your inbox. Attachments use up a lot of memory on your computer. You may prefer to print and file them, then delete them from your inbox.

Practice task 6

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

Email	Folder
Notes for next month's WHS committee meeting	
Email sent to sales staff	
Invitation to a friend's birthday party	
Stationery prices received from 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	

2C | Store emails and attachments

As you receive more email messages, they take up valuable space on your computer. Messages with attachments take up even more space. Eventually, the messages can slow down your computer, as well as the organisation's server. Your applications will run more slowly and emails will take longer to send and receive. The more messages you have in your inbox and other email folders, the harder it is to find the message you need. For all these reasons, develop good habits and regularly tidy up your email folders.

Record and store outgoing emails

When sending emails, keep records of what you send and who you send it to. If there is a problem with delivery, or if someone in your office needs to obtain a copy of emailed correspondence after you have sent it, you will need to be able to find the email message promptly.

Some organisations have policies and procedures to follow when recording and storing emails. Many organisations leave it up to the individual to make a judgment about what is important and what should be recorded and/or saved. Find out whether there are any guidelines in place in your workplace.

Record and store incoming emails

Incoming emails can be recorded in various ways. A report can be printed or a mail register kept, as with paper-based mail. Many organisations do not record incoming emails and instead store important email messages in other ways.

Email messages, just like paper-based business correspondence, are regarded as legally binding business documents and must be stored carefully if they contain important information. What types of messages must be kept, and where, will depend on the organisation. Some will stipulate that messages are to be kept electronically, either in your personal computer files or in the central computer files, while others will want printed copies to be added to their paper filing system. You may be able to delete routine emails confirming meeting times, but be required to keep a printed paper copy of those containing information about contracts.

Your organisation should have guidelines for cleaning out inboxes, and copying and storing mail. For example, some organisations might insist that all staff keep the number of messages in their inbox to a maximum of 50. Other guidelines could relate to copying certain types of documents and filing them in specific locations.

Understand your inbox

If you receive many emails each day, it can be difficult to file them immediately. However, it is wise to briefly see if an email contains important information. It is also possible to know what messages you have and haven't read when looking at your incoming emails – preventing confusion.

Once you have opened an email, it is no longer shown in bold print. However, the message heading will also change if you have had your cursor resting on that email. You can 'mark as read/mark as unread' an email, in order to glance at it and come back to action it later in the day.

For example, click on **Unread/Read** in the Tags area of Microsoft Outlook, if you wish to highlight an email for later use. Alternatively, flag it for follow-up and allocate a reminder time and date. This function is available in Microsoft Outlook by putting your cursor on the message heading, right clicking and then selecting the **Follow Up** function. You may then allocate a date and a priority, as per the following example.

Step 1 Right click mouse, then select **Follow Up** from the list.
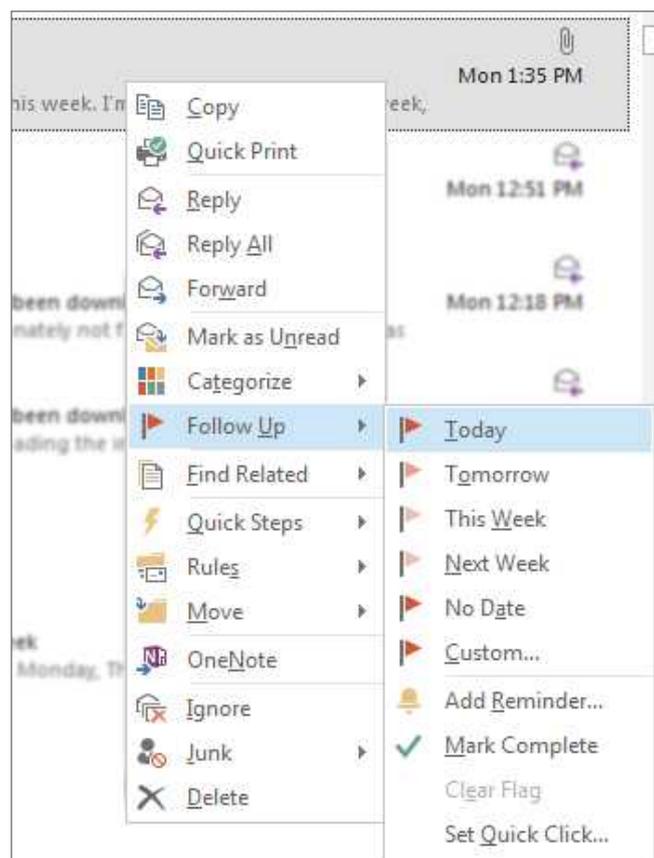
Step 2 Select **Custom**… to set a date and time, plus a reminder if required.
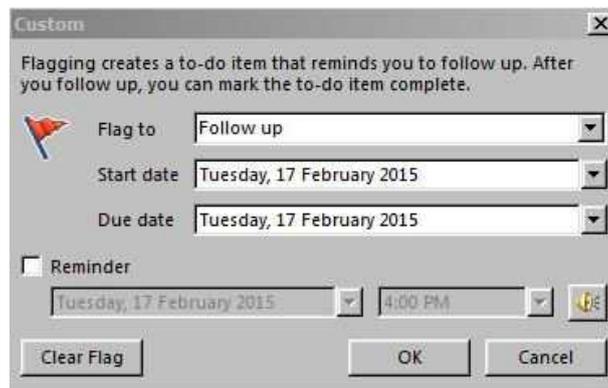
Note: Where possible, it is best to deal with your emails immediately or file them to follow-up later, rather than flagging these for later follow-up. It prevents clutter, and you are able to set yourself a reminder (Task) in most programs without having to keep the email.

Keep records of what you send

When you send an email yourself, or on behalf of someone else, you may be required to keep copies of the message, depending on how important the content is. If the message is routine, it may be enough to keep a copy in your 'sent items' folder for a short time until you are sure the message has been received or the issue it describes has been resolved. More important messages may need to be kept in a specific email folder. For example, you may have a folder for messages about a particular project and the messages are stored in that folder until the project is completed.

Very important messages may have to be printed out and kept in paper form in a file. Each organisation does things differently and you will have to find out how to keep accurate records of what you send. If you are unsure about which messages are important and which should be kept in a particular location, ask for assistance.

Many email systems allow you to receive confirmation that your message has been delivered. This is called a receipt. You may be required to file receipts for important email messages to prove that the recipient received the message at a certain time, on a certain day.

Storing away from your computer

There are many reasons for copying and storing emails and attachments. Your workgroup might want copies of messages about a particular project stored in one place where everyone can access them. You might store non-urgent messages on your computer so you can reply to them later. Stored versions of emails may be useful in case anything happens to the original documents. Sometimes email messages or attachments contain information that must be kept for legal reasons; for example, a contract. More information about archiving is included later.

Email messages can be copied and stored:

- in your email program
- in other software applications
- on your computer
- on a shared computer network
- on thumb drives, external hard drives, CDs or cloud-based storage
- in a filing system in paper-based form.

Example: email handling

Claire at Larger Than Life 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. This could be because of the size of the various attachments related to the Omega project. Claire has decided it is time to review whether she needs to retain all of her emails. Here are the actions she has decided to take with a selection of her emails.

Email	Action
Notes for next month's WHS Committee meeting	Store hard copy in WHS Committee folder. The agenda has already been prepared.
Email sent to sales staff	Save
Invitation to a friend's birthday party	Delete
Stationery prices received from supplier	Print and store a hard copy in the stationery folder.
Conference details for Omega promotion	Save in email and save backup copy onto a thumb drive.
Assessment task to be completed for her business course	Complete assessment task and delete email.
Spreadsheet of Omega budget	Save in email program and on a backup thumb drive.
Confirmation of travel arrangements for managing director to Omega conference	Print for Robert and then store electronically. Save additional copy on a backup thumb drive.
Correspondence from her friend	Delete

Practice task 7

1. Why should you store or archive emails as soon as possible?
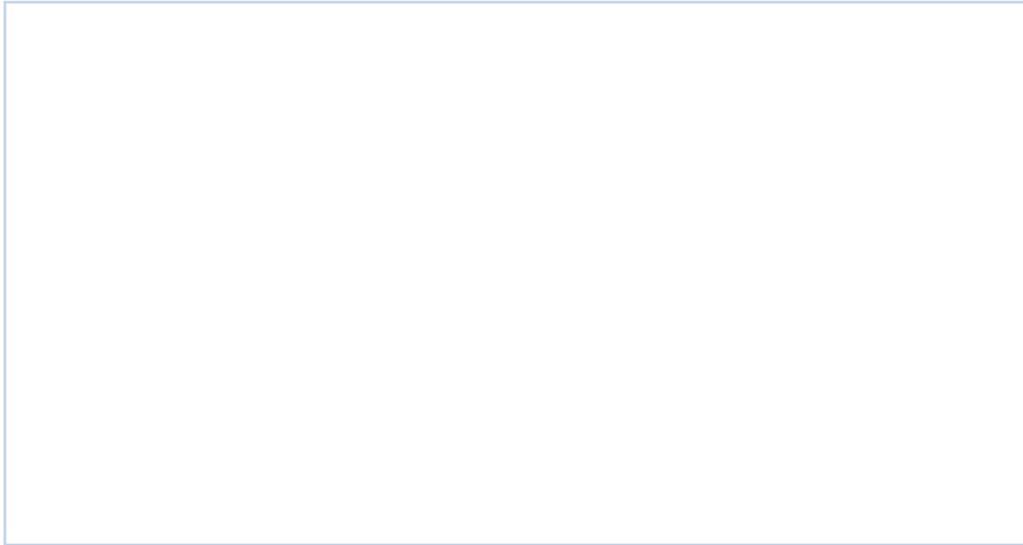
2. Describe an instance when it would be important to print out an email and file it.
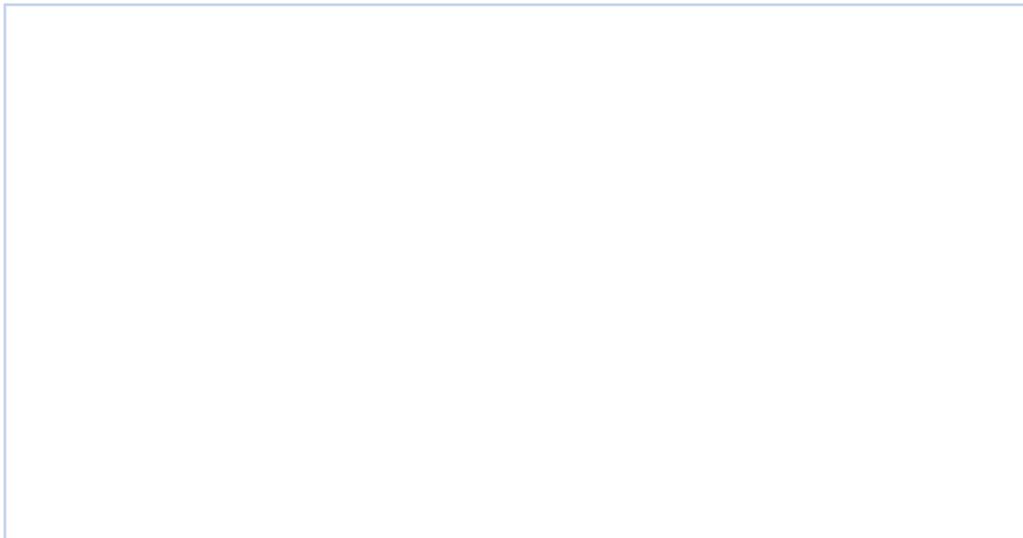
2D Archive or delete email information

You should regularly empty your inbox to keep your email system running efficiently. What should you do with messages that aren't needed? If you are absolutely sure the message is no longer needed, delete it. If the message is still needed, but will probably only be accessed infrequently, archive it.

Email transmissions usually fall into one of the following four categories.

Administrative	These are emails that are received or sent by an organisation's employees and relate to the business activities of the organisation. Your workplace policies and procedures may require you to retain printed copies of administrative emails in the organisation's record management system.
Information value only	You will encounter emails that have only temporary value to the organisation. Examples include: • advice about meeting arrangements • advice about staff movements • copies of documents sent only for reference purposes • stationery requests • instructions to perform tasks • invitations • staff leave requests. You can usually use your own judgment and delete these emails if you believe they are no longer needed.
Spam	These are any unsolicited email messages 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.

Administrative policies for email

You would expect to retain administrative emails for as long as they are needed to meet administrative and legal retention requirements. These records will then be useable and accessible for as long as required; secure from unauthorised access, alteration and deletion; and 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 then 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.

Retention of the following records may be regulated:

- 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

Tips for classifying emails

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 that I am working on?
- Does the email document need approval of an action?
- Does the email provide advice or give a direction?

If the answer to these questions is 'yes', the email should be saved in the organisation's records management system.

Legal retention periods

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. This legislation is outlined below.

> **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.

Archive email

Archiving email messages means storing them for a long time, usually in a safe location away from your personal computer. Archived messages are kept for a variety of reasons. Sometimes messages cannot 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 it will be to retrieve messages when you archive them.

Delete email

When you are absolutely sure you no longer need an email message, delete it. Some email systems have a **Delete** button, so all you have to do is select the message and click on the button. The message will then be removed from your inbox or whatever folder it was in. However, the message may not be permanently deleted. It might just have been moved to a **Deleted Items** folder, as in the following example.

Permanent deletion

If you want to permanently delete the message, you will need to delete it a second time. Select it in the **Deleted Items** folder and click **Delete** again. You will then get a warning: 'This will be permanently deleted. Continue?'
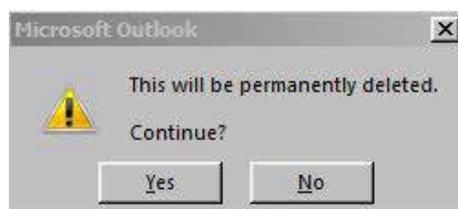
Remove all files from your **Deleted Items** folder regularly.

Different email software allows you to delete messages in different ways. Sometimes you can set up your email system so that messages are permanently deleted the first time. There may also be a keyboard shortcut that allows you to do this, or perhaps you can choose to permanently delete all messages when you shut down your computer. It is important not to move items to this folder if an auto-delete setting is operational, unless you are absolutely sure you will not require them later.

Example: email handling and storing records

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

All museum employees have a responsibility to create and store records of the museum's activities and should observe the following when constructing and managing their email.

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 email messages.
- 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.

Practice task 8

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	
Staff lunch barbecue last month	
Collection of money for gift for Tom	
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 road for construction work	
Thank you note to staff from site manager	

2E | Prepare and maintain electronic mailing lists

Occasionally you will be required to send an email to a group of people at the same time. Distribution lists are groups or lists of email addresses stored in one place. They make group emailing easy because you can send the same message to a group of people simultaneously with the click of a few buttons.

To make it easy to send emails, you should prepare and maintain distribution lists. These might be prepared using word processing tables or data files, database or spreadsheet records, or electronic address books. Follow your organisation's requirements.

Prepare electronic mailing lists

Address lists (address books, contacts, mailing lists) allow you to store contact information about people, including their email address, job title, postal address, phone number, mobile number, fax number and web address. 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.

By entering someone's details into an address list, you can sort your contacts in a way that suits you; for example, by business name or by email address.

Email address lists are not always part of your email system. Email addresses and other contact details can be stored in a variety of locations; for example, in electronic files such as word processed documents and databases. You might work in a sales team and use a database containing a range of customer information, including email and contact details. 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.

Distribution lists

Most email systems allow you to set up distribution lists (mailing lists), which contain groups of addresses under a single name. For example, an organisation's staff address book may list all staff in the organisation, while the human resources distribution list might contain only the names of staff who work in that section. 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 could be required to set up distribution lists related to work projects.

Address book

The **Address Book** in Microsoft Outlook stores names, email addresses and fax numbers to which you can send mail messages. The **Address Book** can contain many different address books, such as the following:

- **Global Address List** – This contains all email addresses for users and work groups within 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, 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. You can do this for your personal mail if you are not at work.

Alternatively, find out how to set up a contact group in your workplace's email system. Check your procedures manual or ask a colleague or your supervisor to help you.

Maintain electronic mailing lists

For email to be an effective way of sending business correspondence, addresses must be maintained. Make sure you maintain the currency of your lists by always checking whether an address or name has changed and adjusting your records accordingly.

Maintaining address lists is a very important part of communicating successfully by email. As discussed in Topic 1, incorrect addresses result in undeliverable mail with possible serious consequences for you and your organisation.

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

Correct spelling

Ask people to spell out their email addresses slowly, and repeat the addresses back to them to ensure you have heard them correctly. Some email addresses have numbers and others have symbols in them, such as hyphens (-) or underscores (_).

Consistent entry

Enter the email addresses into your organisation's email system in a consistent way, so that the system will sort the addresses 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 addresses being sorted by first name and some by last name.

... continued

Preferred location

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

Tips for email addresses

Here are some tips for maintaining email addresses:

- Remove old addresses from the system, either when someone gives you their new email address or when the person's email address is no longer needed.

- Add new records as required.

- Find out why mail is undeliverable. Is it a temporary problem with your organisation or the recipient's email server and should you resend the message at a later time? Is it an old address that needs to be updated or deleted? Have you misspelt the address?

- Regularly check folders, address books, distribution lists, databases and other records to make sure that email addresses are correct, up-to-date and stored in the correct location.

Practice task 9

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.
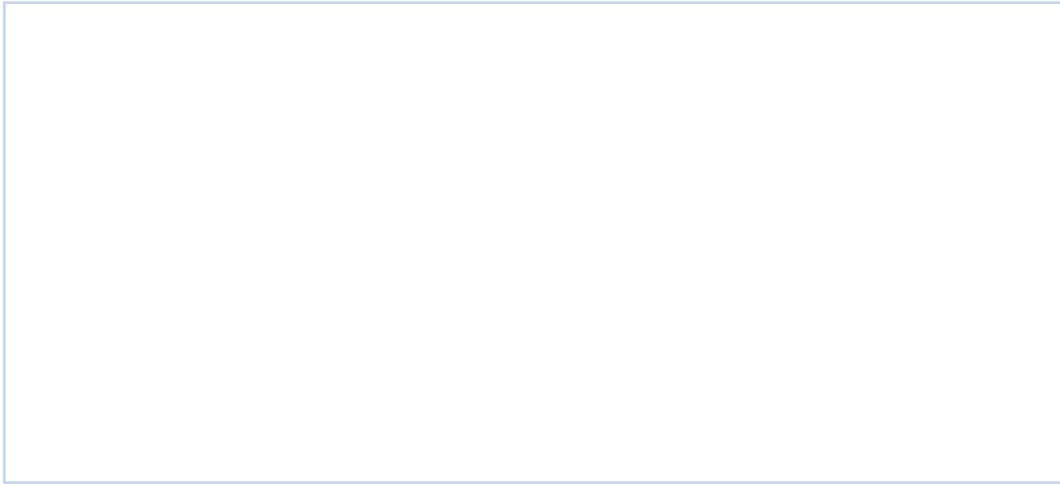
Summary

1.   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.

2.   Address lists allow you to store contact information about people. These lists help you to sort different groups of people to make emailing easier.

3.   Shared lists are email addresses that can be accessed by a number of people in an organisation.

4.   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. Redundant messages should be deleted.

Learning checkpoint 2
Manage electronic email

This learning checkpoint allows you to review your skills and knowledge in managing electronic mail.

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 protection that Australians have to prevent them receiving spam mail. How effective do you think this is?

Part B

Prepare the following email:

1. Type a document of one or two paragraphs in a word processing program describing your job or a job you would like to have. This document will be the one you will attach to your email. Save the document in a suitable place on your computer.

2. Type an email to one of your work colleagues or to a friend.

    • Check that the email address is correct.

    • Type a useful subject line.

    • In the text, explain why you are sending this email.

    • Use formal greeting, language, layout and close.

    • Set up an electronic signature with your name and address.

    • Cc the email to another colleague or friend.

3. Check your email draft for accuracy. Use the Outlook spellchecker.

4. Attach the document.

5. Send the email as 'Urgent'.

6. Create a folder called 'Personal' for storage of this email.

7. Print out a copy to show your trainer.

Part C

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 his 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 also 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?'

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1. Explain why the IT person in this case study might be concerned.
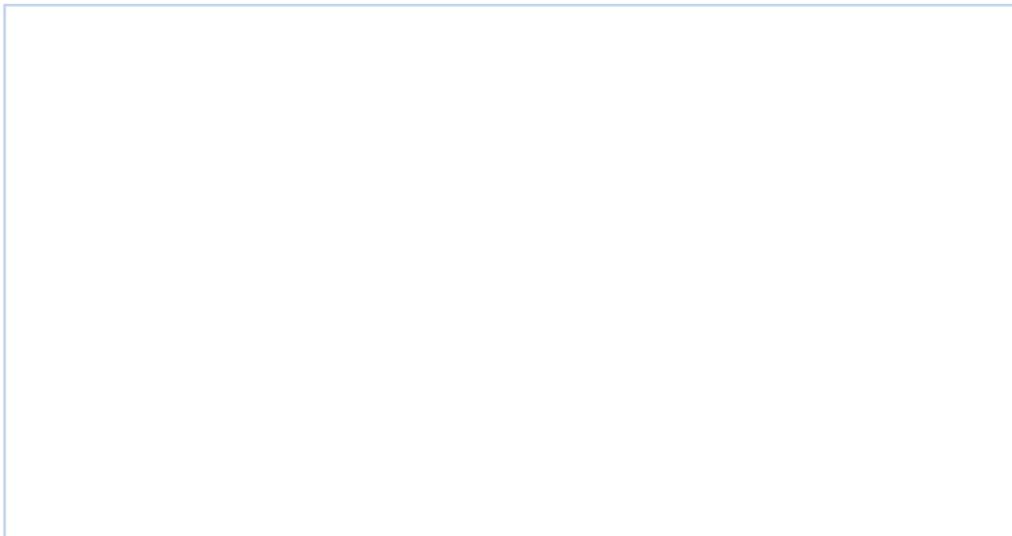
2. Explain what Kris could do to manage his email system better.
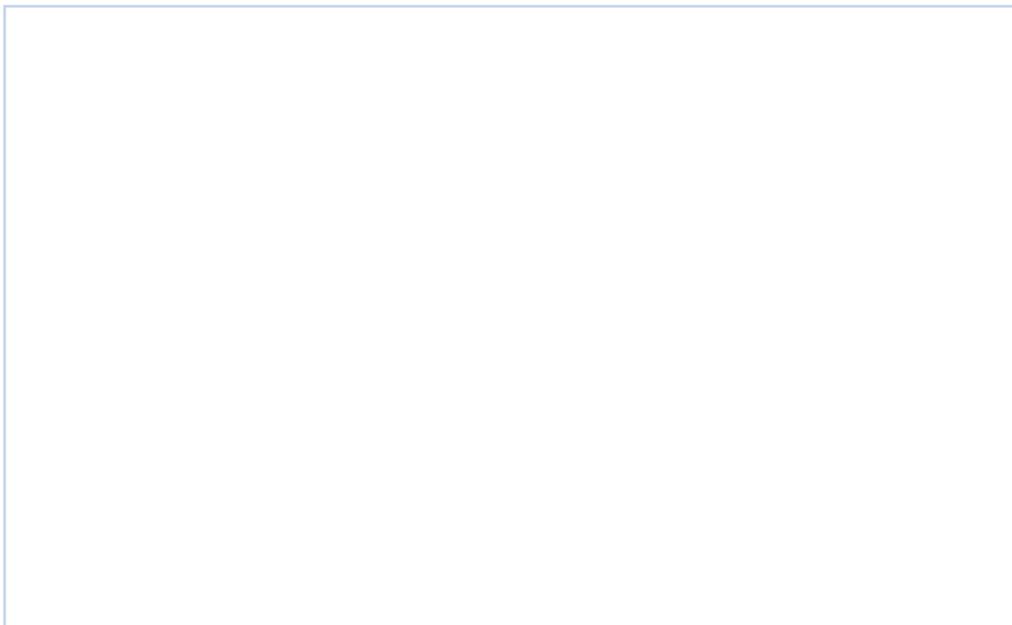
Topic 3
Collaborate online

The number of organisations that support employees working from home is increasing. These employees are able to successfully participate in the workplace by communicating with their work colleagues using a range of electronic communication tools. Organisations are also successfully implementing electronic tools that allow them to form teams of workers in different geographical locations. These 'virtual teams' interact using a range of communication and meeting software that allows them to share their ideas, exchange documents and give an update of their progress. Various protocols have developed to promote the safe, equitable and productive use of online collaboration tools.

In this topic you will learn how to:

3A   Identify software used to collaborate

3B   Embrace netiquette in online collaborations

3C   Respond to online posts or communications

3A | Identify software used to collaborate

Online collaboration tools provide ways to communicate in real time with other parties by typing, by voice, by video or by all three methods. A range of tools is available including chatrooms, file transfers and application sharing. Usually, all participants must have compatible software installed and may need a headset, a microphone and/or a video camera.

In this section you will learn about some of the more widely used online collaboration tools, including:

* instant messaging programs
* Voice over Internet Protocol (VoIP)
* web-based meeting programs.

Instant messaging

An instant messaging program is one that can instantly send messages from one computer to another. They are a form of 'instant email'. They can let you know when your friends or family are online and allow you to send them short messages, similar to sending an SMS text message on your mobile phone. Instant messaging applications let two or more people 'talk' in real time by typing messages in a chat window, using a headset to carry on a conversation, or using a video camera and microphone to both talk and see other people.

Some common instant messaging applications
• Apple iMessage
• Facebook
• Jabber
• Skype
• Trillian
• Twitter
• Yahoo Messenger

Messaging benefits

Most instant messaging programs are free and are either installed with new computers or can be downloaded from the internet. Some instant messaging programs have versions that work on mobile telephones or tablets. Once the program is running on your computer, you will need to create an account and a profile. Your user profile may include personal information.

Most instant messaging applications include the ability to set up a conference room for multiple people. However, there may be restrictions because you cannot have a chat with contacts using two different instant messaging applications.

The benefits of instant messaging include the following:

- The programs are usually free and either already installed on your computer or available as a download from the internet.
- You can easily communicate with people in real time across the internet.
- You can communicate privately (one-to-one) or publicly (one-to-many).
- Files (such as photos and documents) can be transferred easily to another party through many instant messaging programs.
- Web cameras can be used to view images of other people in an instant messaging conversation.

Voice over Internet Protocol (VoIP)

VoIP is becoming much more popular, and many instant messaging applications now provide the opportunity to use VoIP to contact others with your computer and a high-speed internet connection. Some, like Skype, include the VoIP network, while others require an external service to connect to a VoIP network.

Web-based meeting programs

A range of web-based programs is available for holding online meetings, training sessions or presentations.

Web-based meeting programs are particularly useful to organisations that have staff based in different geographical locations.

Advantages of online meetings
• Participants can be located anywhere they have access to the internet.
• Time spent travelling to meetings is reduced.
• All attendees have the opportunity to fully participate in the meeting.
• Individuals can be 'whispered to', which means two people can discuss a particular issue privately.
• Documents relevant to the meeting may be emailed before the meeting or posted to the meeting forum during the meeting.
• The transcript can be saved to generate minutes from the meeting.

Web conferencing

Web-based meetings usually have a moderator who controls the agenda and the mute button, which prevents interruptions. Attendees can also mute themselves to prevent background noise at their location from interfering with the meeting.

Whispering should be kept to a minimum, but may be useful to quickly clarify something; for example, terminology that is unfamiliar to one person.

You should familiarise yourself with any web-based meeting software used in your organisation. You may be able to customise the display of the meeting room and include branding or customised colour schemes. You may be able to add a photo, biography or contact details for each of the meeting attendees.

Example: web-based meetings

Staff at Larger Than Life have a meeting every three weeks to coordinate the promotion for their client, Omega. This meeting involves advertising, sales and media staff in six different locations. The team use a web-based meeting program 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 electronically share documents 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 typed 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.

Information broadcasting tools

Information broadcasting applications are used to distribute information to team members and other internal and external parties. Information broadcasting tools include:

- blogs (short for 'weblogs')
- podcasts (audio) and vodcasts (audio-video).

Blogs

A blog is an online tool that allows people to share personal information informally. Blogs are usually in the form of an online journal. They may be used to record individual or group experiences, observations, reflections, impressions, opinions, questions and research relevant to the interests of the blogger (the author of the blog). Most blogs allow the author to categorise the entries, which lets visitors see only those related to a specific topic.

You can customise your blog by modifying templates and style sheets, or by selecting a different theme. Your workplace policies and procedures may include specific advice on the use of blogs. It is particularly important that you do not breach the privacy of other individuals or the organisation by including inappropriate information on a blog, and that you do not plagiarise (copy) another author's work.

Remember to use non-inflammatory, non-discriminatory language when posting to a blog that is related to your work role. You should also consider that work colleagues may have access to any blog that you create for your personal use outside of work. You may determine that it is unwise to post information to your blog that you would not want work colleagues or potential employers to view.

You can perform a range of functions using blogs, including:

- creating and editing your own blogs
- adding a file or image to your postings
- adding entries and comments
- commenting on other blogs
- creating a list of your favourite blogs
- editing your blog template (colours and fonts)
- moderating postings to your blog before they are visible to readers viewing postings by day or month.

Podcasts

Podcasts provide a way to distribute audio-video files across the internet. Podcasts may be used to refer to audio only or both audio and video (which are sometimes called 'vodcasts'). Podcasts are recordings that can be played through any MP3 player, such as Windows Media Player, QuickTime or a portable MP3 player.

To create a podcast, you need a microphone and headphones (or a headset) and recording software. If you want to create a vodcast, you also need a digital video camera and video editing software.

You may distribute your podcast by emailing a link to the podcast, or by including it on your organisation's website.

Online forums

A forum is an area on a website where people can exchange ideas, thoughts and messages about particular subjects or areas of interest. Forums are also sometimes referred to as message boards or bulletin boards. Many educational establishments use a system called 'blackboard'. This system combines a range of functions, including an online forum for students and lecturers to discuss items of interest or concern.

Online forums are a form of asynchronous communication. This means that communication is in one direction at a time. You don't have to be online at the same time as other participants. Participants can read and reflect on postings and seek out further information before making a response. Online forums allow discussions to take place over a longer period of time than other methods of communication.

The main features of online forums include:

- the ability to categorise messages
- a mechanism for creating responses to the original messages (often called threading)
- the capacity for all participants to view all of the messages and responses in the forum
- a mechanism for finding old threads.

Using online forums

Groups that use online forums appoint a moderator for each discussion. The role of the moderator is to edit, move or remove comments as required. The moderator is responsible for deciding how long postings remain on the discussion board. They are also responsible for cautioning users who do not comply with the rules or guidelines for use of the online forum. Postings stay on the discussion board for as long as the moderator wants.

It is important to remember that forums require the member to visit the website and check for new posts. You should check the forum regularly. You may be able to arrange for an alert email to be sent when there are any new postings that relate to the thread you have been participating in.

Guidelines for using an online forum

There are typically two options for posting a message: you can reply to someone else's message or you can start a new topic of discussion.

You can reply to or comment on a post by clicking on the Reply button. This reply will usually appear below the message that you are replying to.

To start a new topic of conversation, click on New Topic. When people comment on your contribution, the comments will be displayed under the topic name you created.

Discussions are often viewed in threads. Each discussion may have several threads made up of an initial post and replies to that post.

Intranet versus internet discussions

The internet is the 'web' of computers spread throughout the world, while an intranet is an internal site that operates on your company's own servers. It is a 'web' of computers spread across your own business world.

When using an intranet site, it is usual for the interactive sections to look slightly different from the company's public website, which is available on the internet and designed to provide information to the public. An intranet is designed to provide information to a company's employees and for ease of communication.

The software running the intranet is not always the same as that running the company's website as it has special functions to permit or prevent access and is designed to be easily maintained and altered by specialist staff. During online discussions, the layout usually looks quite similar to an internet discussion site, with the tools also operating in a similar manner. However, company branding, colours and format will often be chosen to make sure it's obvious you are using a corporate, in-house tool. Here are some differences between the internet and an intranet.

Internet

Although there is a wealth of interesting, valuable information on the internet, some disadvantages also exist:

- Sites may have incorrect information.
- It takes time to find and download appropriate information.
- Some information may be carrying a virus.
- Previously useful sites may be closed down the next time you seek information.

Intranet

Intranets have advantages and disadvantages, including:

- Pages and links will only have correct information for your needs if updates are made regularly.
- Downloading is faster as it is internally controlled.
- Information should be safe from virus contamination.
- It doesn't have the breadth of information that's available on the internet.

Information-sharing tools

When you are working and collaborating with other people online, you may need to share electronic files. File-sharing software allows you to upload any kind of file for use or review by other people, 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.

In some cases you might want to simply allow other people, including team members, to view files. In other instances, you might want to allow your work colleagues to edit your files and then upload them. Information-sharing tools such as 'wikis', 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 (and when).

Wikis

Wikis are collaborative websites that allow users to add and edit content. The word 'wiki' is Hawaiian for 'fast or quick' and can refer to the site or software installed on the site.

The prime example of a wiki is Wikipedia, the open-source encyclopaedia. Almost all wikis use revision control to prevent abuse and track changes, so if someone decides to erase one or more pages it is easy to 'revert' back to the previous good version. If someone repeatedly attempts to abuse the system, their IP address can be blocked.

Installation of a wiki requires that you upload or copy files to your server, create an SQL (structured query language) database and user account, and run the installation scripts. Installation packages are available for some wikis.

The benefits of using a wiki
• It records ideas quickly, giving you more time for formal writing and editing.
• It's instantly collaborative without emailing documents.
• It's accessible from any computer with access to the internet.
• It enables archiving of revised pages.
• It promotes participation in innovation and change through the sharing of ideas.

Practice task 10

Read the case study, then complete the tasks 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 telephone calls. This means that Lee can speak to Tobias and get complete instructions without rushing through his questions in an effort to save money.

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

2. Is there another way to undertake this task effectively? Which way is most efficient?

3B | Embrace netiquette in online collaborations

When communicating online, there are specific conventions that internet users may be expected to follow. Net etiquette, or netiquette, refers to the rules of electronic communication. Certain practices are considered rude, impolite or annoying. Your workplace may have developed specific guidelines for employees to follow when collaborating online. These guidelines may be included in your workplace policies and procedures.

Netiquette

Netiquette covers all areas of your electronic communication: its language, tone, format, content and structure. The policy on these standards varies from company to company, and you will need to check your policies and procedures so you are communicating effectively with others in the 'language' they expect and understand.

Here are some netiquette rules.

Capitals

One of the basic netiquette rules is not to use capital letters or bold font to emphasise points in your message. This is seen as shouting and therefore considered impolite. A commonly acceptable way to emphasise a word in online communications is to put asterisks around it. For example: 'Could you please let me have your report by *tomorrow* afternoon?'

Privacy

Netiquette includes respecting other people's privacy; for example, by not forwarding their email unless asked and not giving out email addresses without permission.

... continued

Flames

Don't send aggressive messages, even if you are justifiably angry about something. Such messages are called 'flames'. If you have to send a stern or difficult message of some kind, wait until you are calm or even think about it overnight before you send it.

Thanks

If you have asked for information from someone, thank them when you receive it. Always use the same polite behaviour as you would if you were face-to-face with someone.

Criticism

Be careful about criticising other people in emails. This is not ethical and, moreover, you cannot assume that you and the addressee will be the only people to read your email. Email is not necessarily private.

In some cases, organisations have developed policies and procedures that relate specifically to the use of either email or other forms of electronic communication. The following example is an extract from Larger Than Life's email usage policy.

Example: email usage policy

Larger Than Life Email Usage Policy

- Allow time for mail 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. Remember, never put in an email message anything you would not put on a postcard.
- If you are forwarding or re-sending a message, don't change the original wording.
- If you are replying to a message, quote only the relevant parts.
- If you want your mail to be read, don't make it too long. An email of more than 100 lines is considered too long.
- Mail should have a subject header that reflects the content of the message.
- Never send chain emails. You should notify the system administrator if you receive one.
- Remember the internet is a global community, and other people's values and outlook on life may be different to your own. Be tolerant and careful with slang or phrases that may not be understood broadly.
- Take care with addressing email.
- Unsolicited email advertising is unwelcome (and forbidden in many countries).
- Use mixed case, UPPER CASE LOOKS AS IF YOU'RE SHOUTING.

Netiquette for forums and online discussion boards

When participating in forums and discussion boards, you may be sharing ideas, opinions and information with people you do not have a business relationship with. The lack of personal contact between participants can increase the potential for participants to behave poorly and inappropriately. Many organisations are continually improving their policies and procedures for the use of forums and online discussion boards as they come to terms with this evolving technology.

Example: online forum policy

Larger Than Life

Policy for the use of forums and discussion boards

- 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. Please ensure that your message relates to the charter of 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 participation 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 software viruses.

- Do not cross-post. This means that you should not send the same message to two mailing lists or newsgroups. In those cases where you feel it is appropriate to post the message to two mailing lists or newsgroups, you should set the Follow up-To and Reply-To fields to ensure that replies go to only one group, not both.

- Ignore spammers. You will occasionally see spam on mailing lists and news groups. Ignore it.

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

Practice task 11

Read the scenario, then complete the task that follows.

Scenario

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

Draft these guidelines. If you are a member of a forum in either your workplace or learning centre, try to gain permission to post these guidelines to the forum and seek feedback from forum participants.
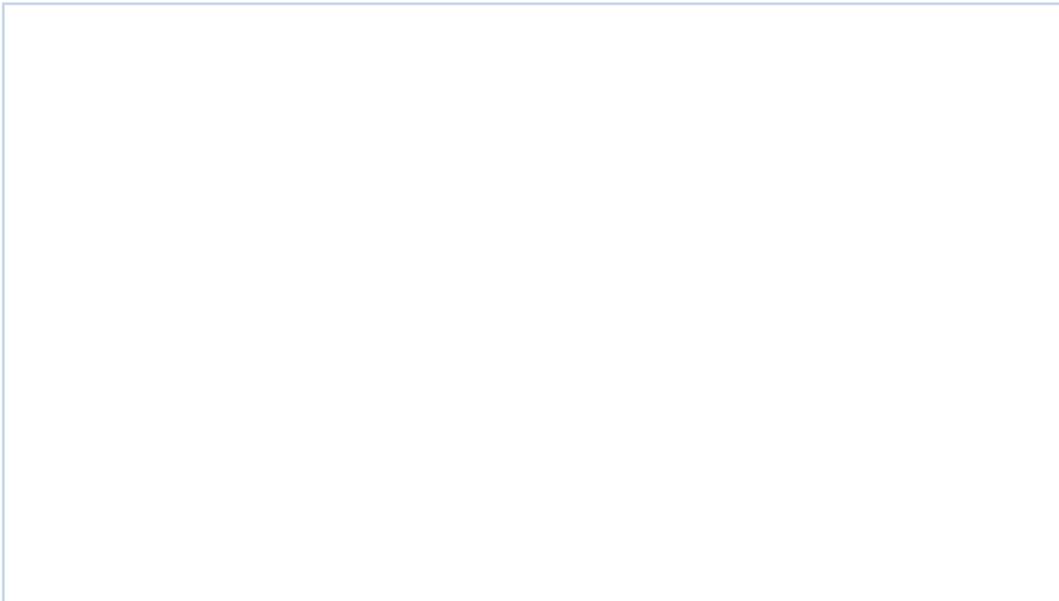
3C	**Respond to online posts or communications**

Protocols to guide users in the use of online communication platforms have been developed by most organisations. In this section, you will examine the protocols and procedures that you should follow to respond to posts or communications.

Participate 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 are able to contribute to the meeting at any time. You will also be able to read all the views of others and make comments as well. You do not need to wait to be called on unless that is specified by the chair. Post comments until the chair puts up a message 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.

You should bear in mind that it is easy to be misinterpreted in this environment because of the absence of visual cues such as gestures and facial expressions, so avoid jokes and sarcastic comments.

Bulletin boards

Bulletin boards and discussion lists are ways of distributing email messages to groups of people who subscribe to the lists. Each list has its own set of rules and guidelines, which are set up to stop people from sending inappropriate information. If you are sending messages to a bulletin board or discussion list, make sure you understand the rules of the list and have the correct address and relevant information that the list's subscribers would like to know.

Remember that you are representing your workplace. Have your message authorised by your manager first to make sure that the views you are expressing are those of your employer.

Many people make embarrassing mistakes when sending email to bulletin boards and discussion lists.

Common bulletin board mistakes

- Using an incorrect address or hitting the reply all button and sending an email to the whole list when you only meant to send it to one person
- Sending irrelevant information that wastes everyone's time
- Misrepresenting your organisation
- Including part of another person's message in your message to the group, without the other person's permission

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Netiquette checks

Check all details of your message carefully, understand the rules of the list and ask your manager for feedback and authorisation if necessary, before you send your message.

General guidelines for bulletin board netiquette:

- Always be polite.

- Respect other people's privacy.

- Don't abuse, stalk, harass, threaten or otherwise knowingly violate the legal rights of others.

- Don't transmit any message, data, image or program that is indecent, obscene or pornographic.

- Don't use jargon.

- Don't use the board as an advertising tool.

- Only answer questions if you have something useful to add.

- Show a professional approach.

Deal with inappropriate behaviour

Your workplace 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 electronic communication.

Unfortunately, you may at some time experience some form of inappropriate electronic communication. It is important that you follow your workplace 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. You should consider whether it is appropriate to print the communication so that you have a copy 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 have the responsibility of taking appropriate action.

Practice task 12

Write step-by-step instructions that you could refer to in your workplace when responding to posts in forums or on bulletin boards.
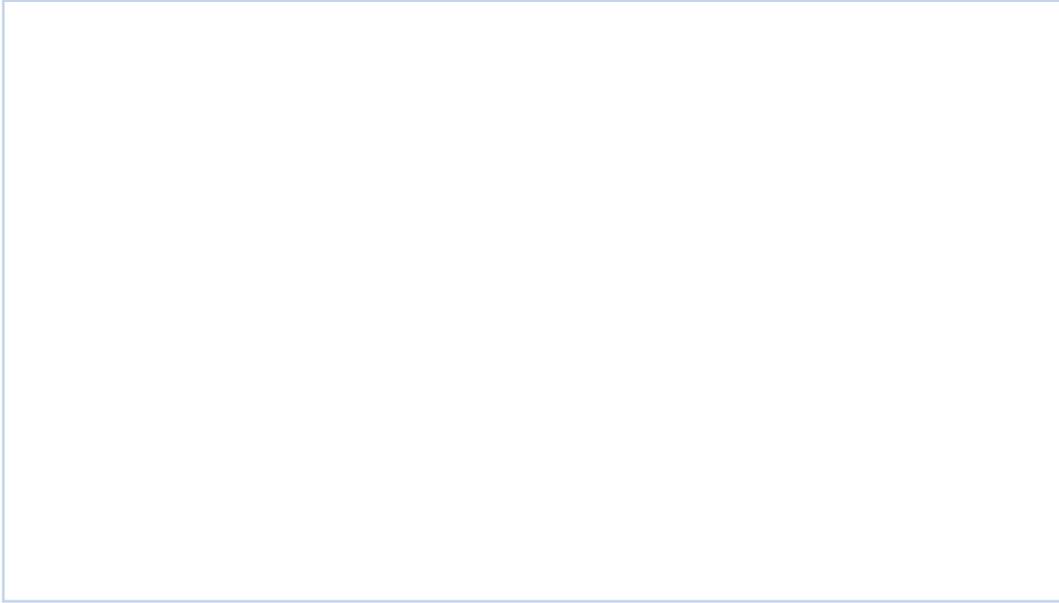
Summary

1. Online collaboration tools provide ways to communicate with other parties in real time by typing, voice, video or all three methods.

2. Netiquette covers all areas of your electronic communication: the language, tone, format, content and structure. It relates to the polite dos and don'ts for electronic communication; for example, using capital letters and bold fonts for emphasis is unacceptable.

3. You should remember that it's not a good idea to post in a forum any personal information that could be used to find your home address or phone number, personal email or mobile phone number.

4. When you encounter inappropriate online behaviour, you should refer to your workplace policies and procedures for advice on reporting the problem and other actions that you could take.

Learning checkpoint 3
Collaborate online

This learning checkpoint allows you to review your skills and knowledge in collaborating online.

Part A

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

Scenario
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 knows you have been learning about electronic communication in your studies. Your supervisor would like you to draft an email or memo that she could send to participants that covers the following: • The advantages of conducting meetings online • How online meetings are conducted • The netiquette required for online meetings • Any tips that would assist participants to contribute most effectively to the meeting.

Remember to prepare a suitable subject line for your memo or email.

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