



Using Outlook with Time Matters®

**Thomas L. Rowe
Robert S. McNeill**

OTB Consulting
Cary, North Carolina

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OTB Consulting
166 Quade Drive
Cary, North Carolina 27513 USA
919-677-1415
<http://www.otb-consulting.com>

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Using Outlook with Time Matters®

Time Matters introduced email in 1999 with an internal email client that supported POP3 and MAPI email protocols. Although it didn't compare technically to the mainstream email clients of the time, being able to store email within Time Matters where it was centrally located, easily accessible and shareable, justified the sacrifice of some of the more advanced features of the other email applications.

Integration with Outlook was introduced in Time Matters 6, giving users the ability to use Time Matters' internal Inbox or the Outlook Inbox to receive email that could then be saved in Time Matters. The integration with Outlook improved with each subsequent version to the point where today there is very little functional difference in the way the two email clients interact with Time Matters.

This paper will explore why Outlook integration was developed, how it is implemented in Time Matters and in Outlook, and how you can use it to better manage the massive amount of emails that you receive every day.

Why work with MS Outlook

Why use the Outlook Inbox when Time Matters has its own internal Inbox? I've been a user of the Time Matters Inbox and email system for over 9 years. I love it. While it undeniably has its warts, it also has a number of incredible features to help the Time Matters user store and share email, and to reduce the overwhelming amount of email that is received daily. In fact, I believe that when used properly, the email system built into Time Matters to manage and triage large amounts of email is the best email productivity tool available anywhere, in any market.

That being said, there are two main reasons that Time Matters offers the use of Outlook as an Inbox. The primary reason is that you simply can't ignore the fact that Outlook is one of, if not the most ubiquitous software programs in the business and legal world. You can't ignore its penetration in the market, and the fact that so many attorneys know how to use it. When a program is the one program that senior partners actually know how to use, and that IT Professionals within law firms rely on for a primary, mission critical business function, you simply can't take it away and insist the firm use an email client they know nothing about and that is not as robust as Outlook.

The second candid reason is that the Time Matters email system has been the most problematic component of Time Matters since it was introduced. Because Time Matters users receive large volumes of email, many having attachments, the Time Matters Professional database was not powerful enough to efficiently and safely handle the email function. While the use of Time Matters Enterprise relieved many of the email problems and provided a higher level of fault tolerance, the internal Inbox and attachment problems persisted. By utilizing the Outlook Inbox as the "gateway" into the Time Matters email system, the burden of handling the large volume of email and attachments is handled by a program better designed for the job.

Adding the Outlook Inbox functionality worked. Law firms are not required to abandon Outlook, something larger firms in particular were reluctant or refused to do. And, firms using Outlook experience fewer problems with the stability of the Time Matters email system.

Advantages of Outlook

In addition to the Time Matters-specific reasons set forth above, there are other reasons to use Outlook instead of the internal Inbox:

- It's the most used email system – it is estimated that the Outlook/Exchange platform provides the email infrastructure for over half of all businesses. There is always power in numbers.
- Most people know how to use it – because most people know how to use it, training costs are reduced, and firms and lawyers get to continue to use a program they are comfortable with. This in turn reduces the amount of “cultural” upheaval a firm experiences when they implement a practice management system.
- It's basically free – as a component of Microsoft Office, which most firms already have and which is preloaded on most business computers, it doesn't cost anything extra.
- It's a good program – contrary to the assertions of those who dislike anything Microsoft, it is a well written program with a lot of nice features. It has problems like all computer applications, but when configured properly it works well and provides great utility.
- Using Outlook reduces the amount of email that gets into Time Matters – using the Outlook Rules feature you can keep large volumes of email (e.g., those received from sources like Internet list servers) from getting into Time Matters to begin with. Time Matters has its own Rules feature, but it only works once email is already in Time Matters.
- Used with Exchange, it provides server-level spam and virus control – because it can be run as a server-based application with Exchange Server, users can centrally control spam and viruses instead of having to control it on a workstation level. You have to experience a total lack of spam and viruses on a daily basis to truly understand the value of this feature.
- 3rd party add-ons – because of its popularity and market reach, there are dozens if not hundreds of add-on applications that let you extend the program in any way you could possibly want.

When compared to some of the limitations of the Time Matters internal email client, there are also several other advantages (some of these may not be seen as advantages by everyone):


- Outlook supports graphic signature lines.
- You can use wallpaper, letterhead, headers and footers and other formatting that to some makes email “look” better.
- It is more forgiving and handles mass emailing better than Time Matters' internal client which is notoriously finicky when it comes to sending large numbers of emails.
- While there are those who call it “Lookout” instead of “Outlook,” and while I have had my own share of problems with it, it is more stable than Time Matters at handling the Inbox function.

Basic Use

The basic Outlook/Time Matters integration concept is that email is received in Outlook, and then an exact duplicate of the email is created in Time Matters. This is called “connecting” the email, and is done using the **TM Connect** button, found on the Outlook toolbar. Sent email and attachments can also be connected to Time Matters.

To Save an Email

To save an Outlook email into the Time Matters email system:

- Highlight the email.
- Press the **TM Connect Email** button - 
- A new Time Matters email, which is a duplicate of the Outlook email, is created and displayed.
- Enter the **Regarding** line information to relate it to a Contact or Matter, and then enter any optional information like the **Classification Code**.

To Save an Attachment

To save an Outlook email attachment into the Time Matters **Document Management System (DMS)**:

- Open the Outlook email, and press the **TM Save Attachment** button:



- A Time Matters Document Record is created.
- Complete the Document fields that you would normally complete to add a document into the to the Time Matters DMS.

Adding an Attachment to an Outlook Composed Email

To add an attachment from the Time Matters DMS to a composed Outlook email:

- From the composed email, press the **Add Attachment** button:



- The Document List, as it exists inside Time Matters, is displayed. Your Quick Tabs, as well as all the other standard methods you need to locate the document you want to attach, are available to you.
- Once you located the file, press **Select** to add it as an attachment.

- Repeat the process for multiple documents, as the integration unfortunately only lets you choose a single document at a time.

Advanced Use

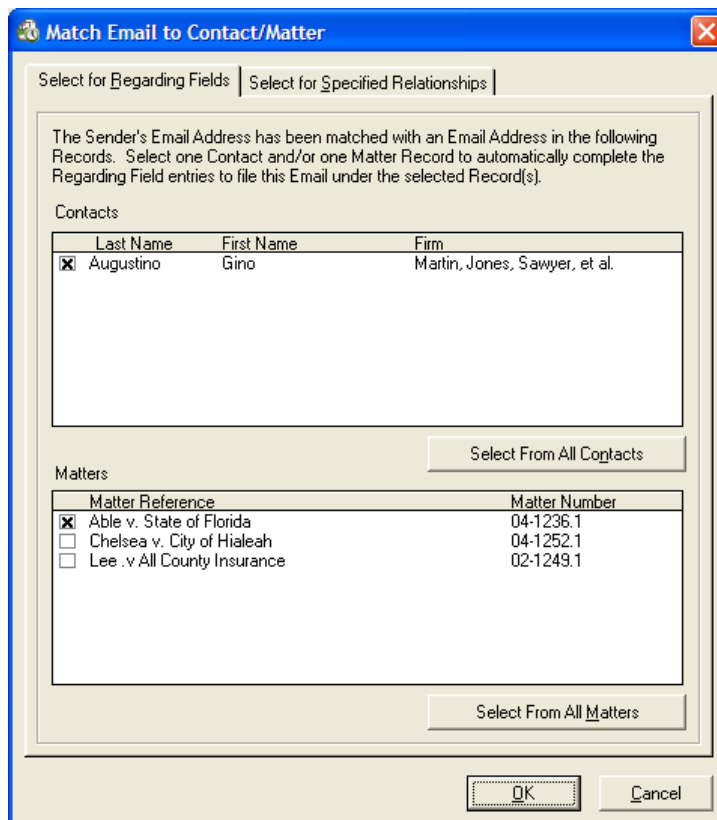
It is the advanced functionality of the integration that makes using Outlook so powerful. The use of the advanced features is explained below, followed by details on the configuration, settings, and customization you will need to make these features work.

Auto-matching Emails

One of the most powerful features of the Time Matters internal email system is to have incoming emails automatically matched to the Matter and/or Client to which the email is related. If you receive an email from anyone involved in *Able v. The State of Florida*, the Time Matters email system provides a mechanism to easily match and then relate the email to *Barry Able's* Contact record and to the *Able v. The State of Florida* Matter record.

Because relating an email in Time Matters to a Contact and/or Matter record is the equivalent of “filing” the email, auto-matching is a unique and powerful feature to quickly file incoming email in the proper. This feature is fully functional in the Outlook/Time Matters integration.

Once you have customized and configured Time Matters (as set out below), and you press the **TM Connect Email** button in Outlook, Time Matters quickly searches its Contact and Matter lists (it actually uses an index) to see which records contain an email address that of the sender. These records are then shown in a **Match Email to Contact/Matter** dialog.



- If the email is related to more than one of the Contacts or Matters that are listed, press the **Select for Specified Relationships** tab across the top of the dialog. You can then check off as many additional records as you want to relate the email to.
- If the email is related to a Contact or Matter that is not listed, you can press the **Select From All Contacts** or **Select from All Matters** buttons to select other records you want to relate the email to.

In both these instances you will still have a single email, but it will be associated with multiple Contact and Matter records.

Press the **Ok** button and the new Time Matters email, which is a copy of the Outlook email, will be displayed with the Regarding lines completed from the selections that were automatically made or that you adjusted. You can then complete any additional fields and save the email in Time Matters.

Handling Attachments

In the previous section, we looked at saving attachments one at a time. A more advanced technique was introduced in Time Matters 8. When you press the **TM Connect Email** button on an email with attachments, you get the following dialog:



You can save the attachments as:

- **Attachments to the Email** – this means that the Email Record in Time Matters will have all the Outlook attachments added as Time Matters attachments. In that many users are using Outlook to keep from accumulating large numbers of attachments, this will likely be the least used of the options.
- **Document records related to the Email** – Time Matters will automatically create a Document record for each document attached to the Outlook email, will automatically complete the **Regarding** fields to match those found on the email, and will use the Time Matters **AutoNaming** feature to name the document and place it in the appropriate folder in the firm's shared folders. A Specified Relationship will be created between the new Document record(s) and the Email record which lets you see which documents were attached to the email.

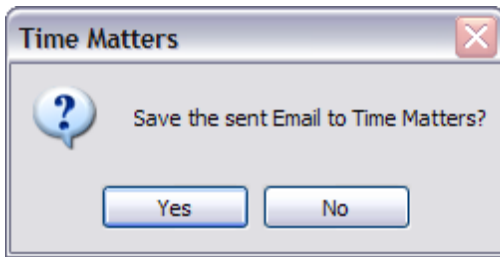
This is likely to be the most used method and is actually a superior method to that used in the internal Time Matters Inbox. The only downside that might be associated with this method is that email wallpaper and other graphics, as well as vCards, will get saved as Time Matters document records.

- **Do not save attachments from this Email** – depending on what is attached to the Outlook email, you might not want to save it at all. This would especially be true if the attachments are graphics, vCards, or other documents that you wouldn't want in the DMS.

Each time this dialog is displayed it will default to the value you last used.

Handling Sent Items

If it makes sense to save received email from Outlook to Time Matters, then it also makes sense that you might want any email that you compose and send to be saved as well. Since Time Matters 8, when you press the Outlook **Send** button, you can have Time Matters prompted you to see if you want to save the email:



If you respond **Yes**, a Time Matters email record is added.

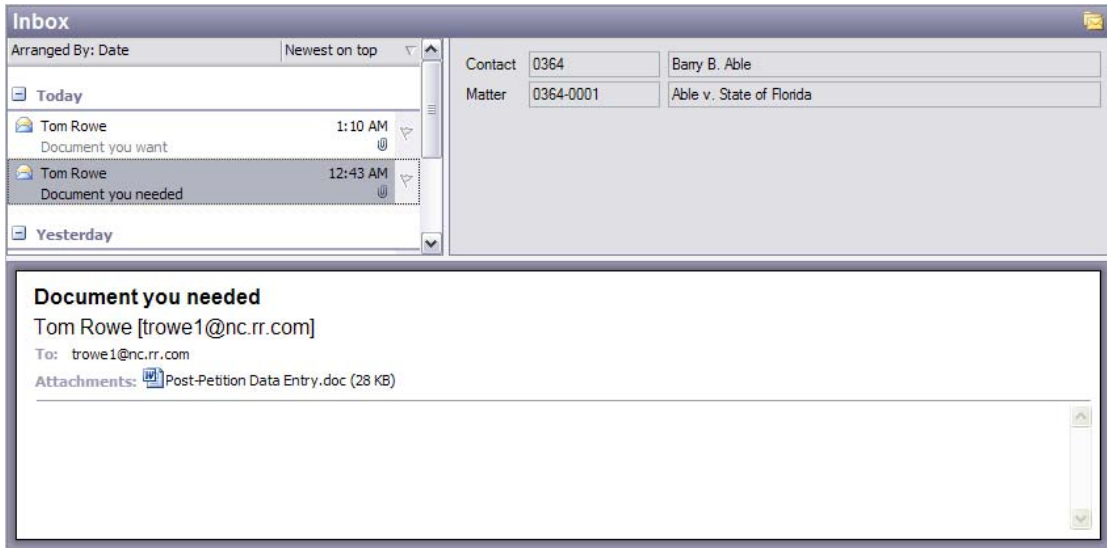
If there are documents attached to the Sent email, you will be prompted as set out above to see how you want to handle them. How you handle the attachments would depend on a number of factors:

- If you used the **TM Add Attachment** button to add the attachments from the Time Matters DMS, you might not want to save them back into the DMS as that would create duplicates.
- If you decide not to save them into the Time Matters DMS, you may have incomplete audit information if you have to come back later and find what you sent. If you think that might be a possibility you could save them as attachments to the Time Matters email, or as Time Matters Document records.

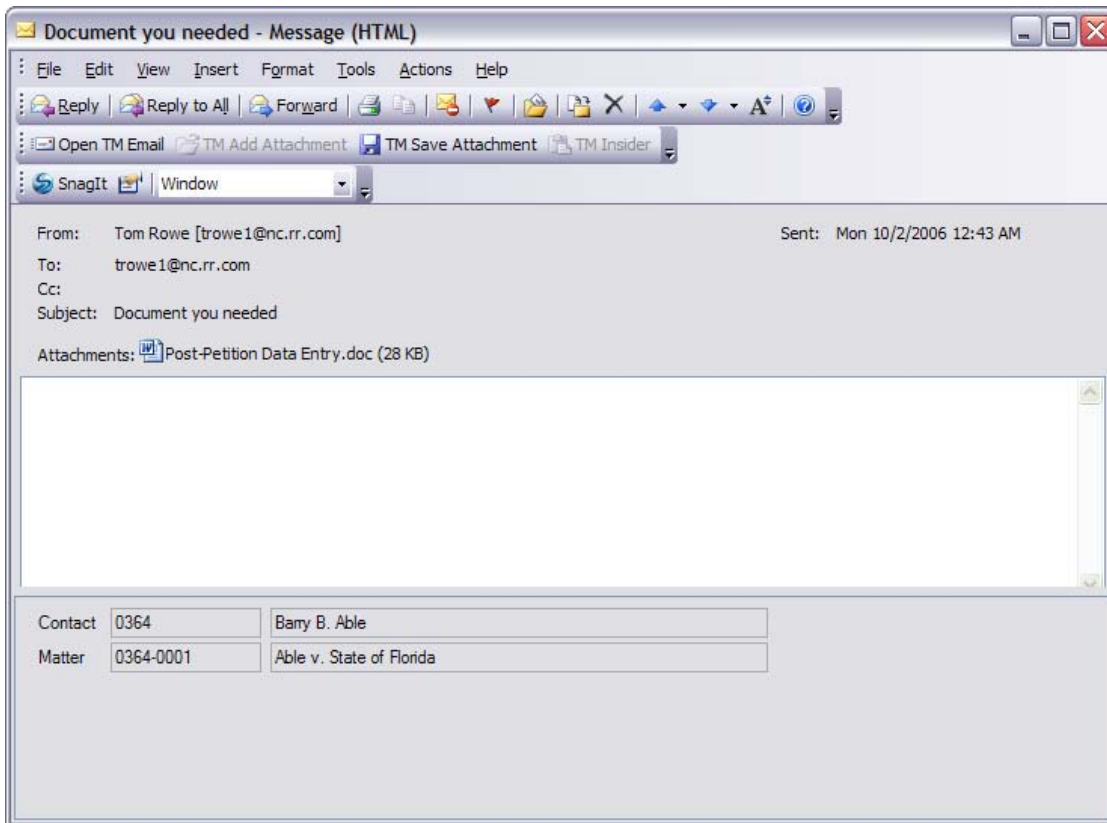
Regarding Information

Once you connect an Outlook email, you may want to view the associated **Regarding** line information that you completed in Time Matters. In other words, data you entered in Time Matters will now come back into Outlook. You can show the information on the Outlook Email list (Inbox) and/or the Outlook Email form.

When you view a connected email on the Outlook email list you see the **Regarding** line information to the right of the email as shown below (or it can be shown at the bottom or left of the email list, or can be hidden):



If you open the email you will see the Time Matters **Regarding** information at the bottom of the email as shown below (or to the right, depending on your setup preferences).



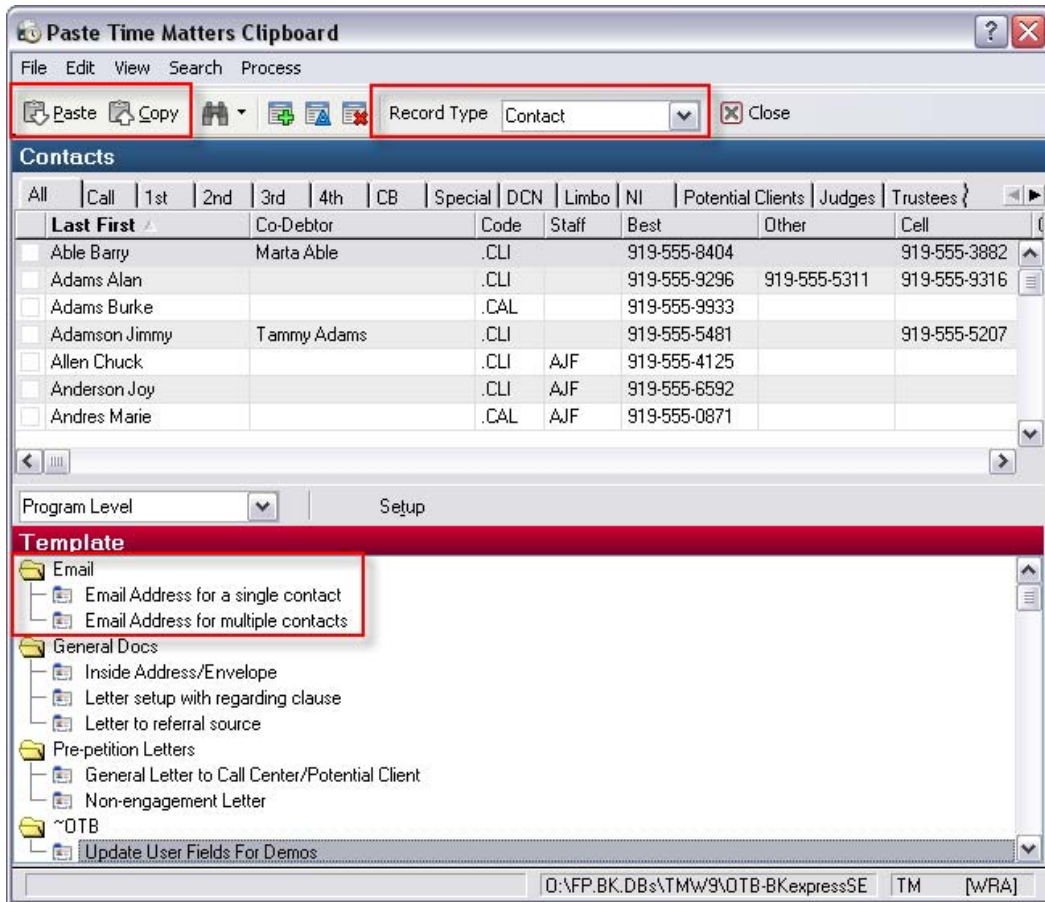
Form Emails

In many practices, the same emails are sent over and over, just like paper cover letters and mail merge letters. The **TM Insider**, which is also available for Word, WordPerfect, Excel and a few other programs, lets you choose any the Time Matters records and then merges the data from the records with any of your Formattable Clipboards. This lets you easily and quickly create “Form” emails.

- From a composed email, press the **TM Insider** button.



- From the top section of the Insider, select the record type from which you want to draw your data.



- In the lower section, select the template that you want to use.
- When you press the **Paste** button, the data from the Time Matters record is merged with your Formattable Clipboard template and a form email is created.

Installation and Configuration

From the Time Matters Side

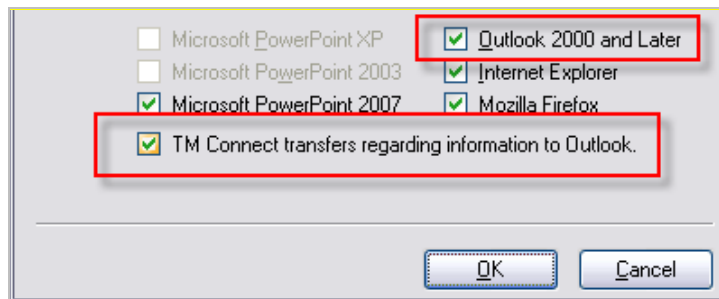
The integration between Time Matters and Outlook is initially controlled from within Time Matters.

Workstation Level Settings

Assuming that Outlook is already installed, it is done automatically when you install Time Matters.

If you have to reinstall the link between the two programs:

- Go to **File ► Setup ► General ► Workstation Level**.
- Press the **Additional Program Setup** button.
- Make sure to check the checkboxes for:
 - ▶ **Outlook 2000 and Later**
 - ▶ **TM Connect transfers regarding information to Outlook** – only select this option if you want Time Matter Regarding field information to flow from Time Matters into Outlook (see section above). Most people do not use Outlook in a way that this would be helpful, and for most people it should not be checked.

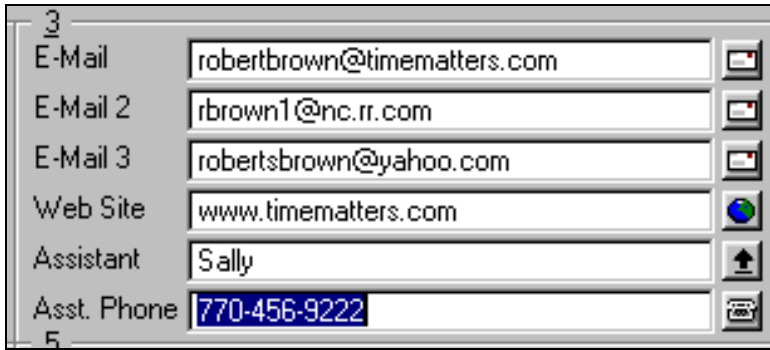


Press **Ok** twice and Time Matters, with very rare exceptions, installs the necessary Add-in to integrate Time Matters and Outlook.

Customizing the Time Matters Contact and Matter Forms

So that the **Automatching** feature works optimally, you need to make sure that your Time Matters Contact and Matter/Case records are setup properly. The first issue is to make sure that you are adding the email addresses to the Contact and Matter forms in the correct way. You are required to use a field that is of the “Email” type ... a text field will not work.

The second issue is to make sure the Contact and Matter Forms contain the requisite email fields. In the screenshot below, taken from a Contact record, there are three email fields.

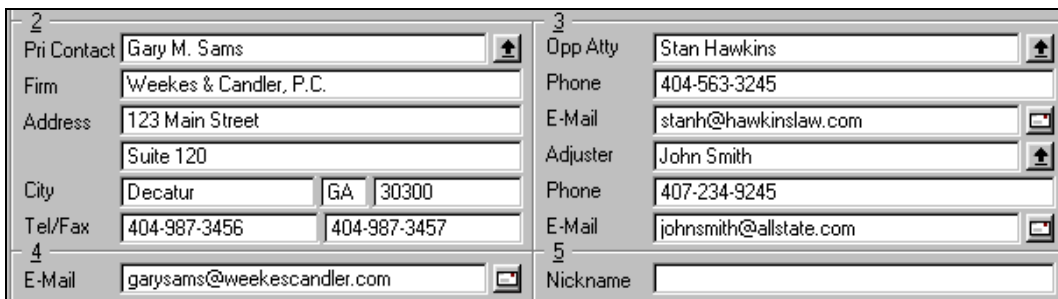


A screenshot of a Matter Form showing several fields. The fields are: E-Mail (robertbrown@timematters.com), E-Mail 2 (rbrown1@nc.rr.com), E-Mail 3 (robertsbrown@yahoo.com), Web Site (www.timematters.com), Assistant (Sally), and Asst. Phone (770-456-9222). The Asst. Phone field is highlighted in blue. There are small icons to the right of each field.

Because many people now have more than a single email address from which they may send you email, it is important to facilitate more than one email. For example, it is not uncommon for someone to have an office email address, a home email address, and a web-based email address for use when traveling. Because Time Matters can search more than one email field when it searches the Contact and Matter database to locate a match, you will want to change your Contact Form to include several email fields.

When working with Matters, you will want to make sure that at least the primary email address of the Contacts that you link are pulled into the Matter. It isn't good enough to have a Contact related or linked to a Matter for the feature to work. The actual email address has to be contained in a Matter Email field. This is a little more problematic with Matters as you don't have the fields to waste by bringing in multiple emails for each linked Contact.

This screenshot shows Areas 2 and 3 from a Matter Form. The Areas have been customized so that when the Primary Contact, Opposing Attorney and Adjuster are linked to the Matter, their primary email account is also brought in and populate an email field.

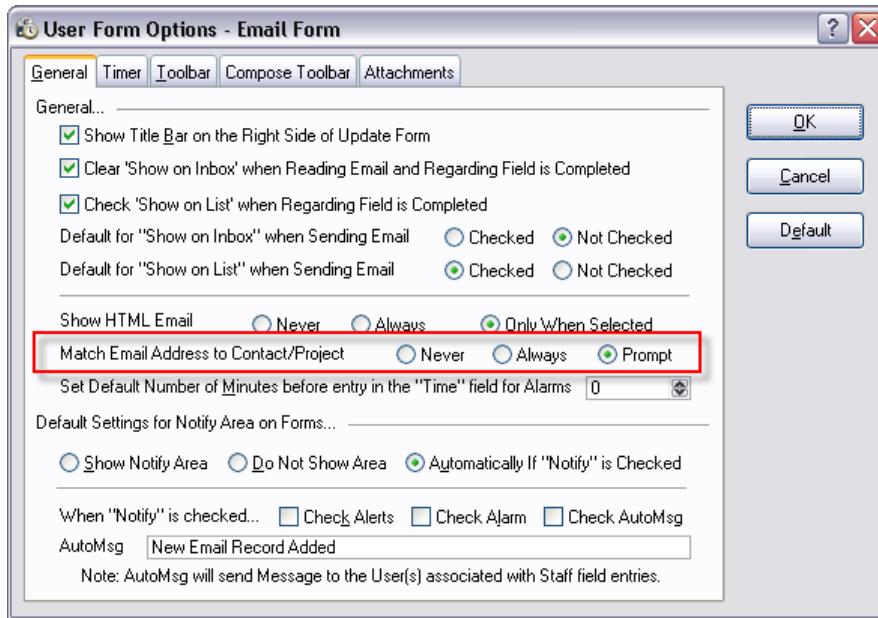


A screenshot of a Matter Form showing contact information for three individuals. Area 2 (Pri Contact) includes: Gary M. Sams, Firm: Weekes & Candler, P.C., Address: 123 Main Street, Suite 120, City: Decatur, GA 30300, Tel/Fax: 404-987-3456, 404-987-3457, and E-Mail: garysams@weekescandler.com. Area 3 (Opp Atty) includes: Stan Hawkins, Phone: 404-563-3245, E-Mail: stanh@hawkinslaw.com. Area 4 (Adjuster) includes: John Smith, Phone: 407-234-9245, E-Mail: johnsmith@allstate.com. Area 5 (Nickname) is empty.

An email from Gary, Stan or John in this example will not only automatically match to their Contact record, but will also match to this particular Matter in which they are listed as the Primary Contact, Opposing Attorney or Adjuster.

Configuring the Email Form Settings

You also need to turn the auto-matching feature on. This is accomplished in the **User Level Form Options**:



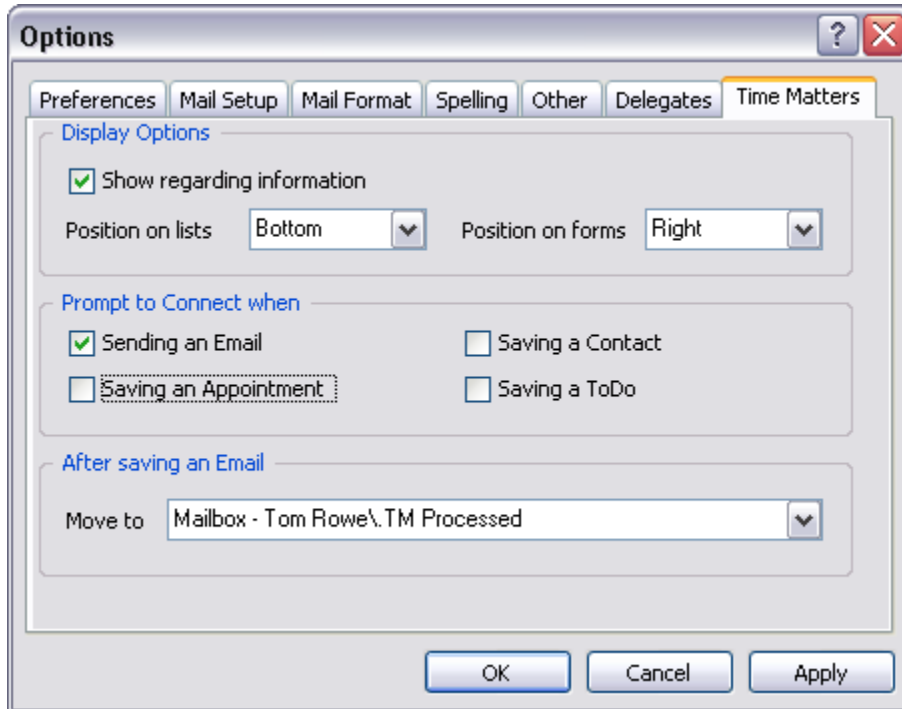
Make sure that the **Match Email Address to Contact/Matter** radio button is set to **Always** or **Prompt**.

- **Always** - if you set it to Always, and Time Matters locates one matching Contact or Matter, it will automatically complete the Regarding fields of the email without user intervention. If it finds more than one match, it will prompt you to choose which Contact or Matter you want to relate the email to.
- **Prompt** - if you set the option to Prompt, you are always prompted when any match is found. This is my personal preference as it gives more control over making sure the email is assigned to the correct records, and lets you more easily relate it to multiple records.

From the Outlook Side

Once the integration is completed from the Time Matters side, an Add-In has been placed in Outlook. There are a number of options for how the integration works:

Go to **Tools ► Options ► Time Matters**.



Display Options

If you turned on the **TM Connect transfers regarding information to Outlook** option in Time Matters, you need to set how you want that data displayed.

- **Show regarding information** – you can choose not to show it. If this is what you want, you should also turn it off in Time Matters as explained above.
- **Position on lists** – this is where it will show when you are looking at the Email List. Your options are Hidden, Top, Bottom or Right.
- **Position on forms** – this is where it will show when you are looking at the Email form. Your options are Hidden, Top, Bottom, Left or Right.

Prompt to Connect when

When you **Send** an email you will typically want to save a copy of it in Time Matters. To be automatically prompted, check the **Sending an Email** option.

The option is also available for the other 3 record types that you can save in Outlook. Typically you won't use these features as these types of records are added in Time Matters, not Outlook. But, if you have a need to add records in Outlook, don't want to sync them, but instead add them

to Time Matters in a one-off way, check the checkboxes for the particular type of record that you are going to add.

After Saving an Email

This feature is a must-use feature if you are going to use the RAFTing concept described below. This feature automatically moves an email to a folder of your choice once it is TM Connected. As you will see in great deal below, this is a key component of controlling your overwhelming email that you receive every day.

There is no right or wrong on what folder you choose. I typically suggest one called TM Processed, and then rules are set to Archive them every certain number of days.

One nice aspect of this feature is that it provides a backup for the email you have saved into Time Matters.

Eliminating Email Overload with Outlook and the Time Matters Email System

One of the key benefits of the internal Time Matters email Inbox is the ability to help you handle the overwhelming email you receive. This system was specifically built into Time Matters – it was not happenstance that it works so well for this purpose.

In 2001, my partner Bob McNeill and I wrote the seminal white paper describing how, by using the internal Time Matters email system, one can eliminate the burden that is caused by getting too much email. The paper has been downloaded thousands of times, I have had hundreds of Time Matters users tell me how important it was for their work efficiency, and how it is one of their favorite features of the program.

This is the updated version of that white paper, adjusted to use Outlook as the Inbox through which all your email will travel before ending up in Time Matters to be processed.

Email – Boon or Bane?

What can be wrong with a technology that lets you do in seconds what used to take days? What downside can there be with a technology that lets you deliver written communications around the world in seconds, without having to pay postage?

If you answered, “SPAM, junk email, or the spread of viruses, that’s what,” you are right. But, those are the obvious email problems that are well known, well publicized, and have plenty of talent dedicated to their eradication. The real insidious downside to email is the negative impact it has daily on business productivity. Email Inboxes with hundreds of email messages are not manageable; staff members using their Inbox as a quasi-ToDo list are not efficient; and companies that have thousands of email messages stored in non-shared folders that cannot be effectively searched waste hundreds of hours of time locating information that should be easily accessible to them. The sheer amount of email that is received daily, without an effective method to deal with it, can simply be overwhelming.

In an article, *Email: Does it simplify lawyers' lives or just increase the stress?* (California Bar Journal, May 2001), the director of the State Bar’s stress management program notes that participants in the program “now cite today’s constant stream of email as a source of stress.” Among the problems that lawyers face are “greater client expectations, ... and, some say, an onslaught of electronic messages 24 hours a day, on top of their telephone voicemail, cell phones and pagers.” As the article notes, “[o]n an average day last year, North Americans sent 6.1 billion email messages, ... [and] [t]hat number will jump to 18 billion emails a day by the year 2005.... And researchers expect that more than half of those emails will involve business, not personal, matters.” This was an article in 2001 ... the magnitude of email that is received each day in 2008 is many-fold more.

A good start in handling the problem is to implement well thought out, office-wide policies on how to handle incoming and outgoing email. Then, use Outlook and Time Matters email model to help eliminate “email overload” with tools that let you quickly process email by turning incoming and outgoing messages into Time Matters records that can be easily and quickly searched,

associated with a particular client or matter, or used to quickly create a ToDo or Event which is then handled as it should be in a practice management system. Using this system will help alleviate the overload and reduce the stress and inefficiency associated with the ever increasing amount of email traffic.

Pushing Paper

When looking at the root cause of email overload and how it should be overcome, it is helpful to compare it to a well known problem that has been around much longer than email ... the problem of “pushing paper.” Executive organization experts teach that the best way to avoid being overwhelmed by paper is to do the best you can to make sure that you “touch” a piece of paper once, and only once. Many people waste considerable time moving paper on their desks from one stack to another, use these stacks as quasi-ToDo lists, and often end up spending more time shuffling the papers around their desks than it would take to accomplish the tasks for which the papers call. Just walking into an office with a messy desk can cause confusion and disrupt an otherwise organized day.

One system to reduce this problem that is widely in use is the RAFT system -- Refer, Act, File or Toss/Throw Away. Pursuant to this system, the first time you “touch” a piece of paper you should refer it to the appropriate party to be handled, act on it to completion, file it for later use or reference, or toss it in the round paper file – the waste basket. The diligent application of RAFT can result in a reduction in the amount of paper with which one has to deal, gets it to the person who is best suited to handle the task it represents, and generally increases productivity by reducing clutter and the inefficiency that is inherent therein.

RAFT Applied to Email?

Because the problems associated with email overload are similar to those caused by having too much paper to handle, it is instructive to look at paper overload solutions for the answer to the email overload problem. Instead of having a desk cluttered with paper, you now have an Inbox with 450 email messages. Instead of moving stacks of paper around on your desk, you move email from folder to folder. Instead of using the stacks on your desk to govern the order of your day, you turn to the email in your Inbox to determine what needs to be done next. Instead of not being able to locate a document you need because it is buried on your desk, you can't find the email you need because you don't know what folder it is in or it may be in a non-shared folder. And, for some reason you simply can't seem to bring yourself to delete email messages any more than you can throw away the paper you collect that is infrequently needed or used.

Applying a modified version of the RAFT system to Time Matters' Outlook email implementation, and applying the following principals, you can eliminate “Email Overload.”

Your Outlook Inbox is a Gateway to Time Matters, not a Repository

The Outlook Inbox is not a ToDo list, nor is it a repository for email. It is a gateway through which email passes and is appropriately processed. Just as you strive to have a clean desk, free from paper, you should have a clean Inbox, free from email messages. This is accomplished by “touching” an email message once, and only once.

Because the Outlook Inbox is simply a gateway through which email messages get entered into the Time Matters Email database, and then associated with the appropriate Contact and/or Matter, you should avoid the use of folders. The Contacts and Matters are your folders ... you don't need them in Outlook. This can be a difficult habit to overcome for traditional users of Outlook who are accustomed to using folders to segregate their email messages, but it is a vital and important change to make.

Who is in Control ... You or Your Inbox?

In a sidebar entitled *Email Addiction*, PC Magazine reports that 34% of office workers check email continually during the day. *PC Magazine*, September 4, 2001, p. 29. Just 3 years later, the percentage had doubled. In a survey conducted by Osterman Research in 2004, Helen D'Antoni reported that 68% of office workers check email "more or less continuously" and that 17% check email "a few times per hour." And, which of us have not seen people checking email on PDAs in about every imaginable place you could think of (and some I would never have thought of).

This is strong evidence of how improper handling of email can result in office inefficiency. To avoid this, think twice about having your email Inbox open all the time, and give serious consideration to turning off the sounds and visual clues that indicate when a new email has arrived. It is amazing that the same people who closely regulate their schedules, have an assistant screen their calls, and keep in-office distractions to a minimum don't give a second thought to having their email program "ding" every couple of minutes so that they can quickly pop up their Inbox to see what new email just arrived.

But, you say, "I am a very important person and so are my clients. They need to have immediate access to me." Admittedly, there are times when you will want to keep a close eye on your Inbox. For example, if you are in the middle of remote deal negotiations or the collaborative drafting of a document, you will want to check your email regularly. But, outside these special circumstances, if someone really needs to get in touch with you urgently, email is not the preferred medium. Your important clients should contact you by phone or at least give you a "heads up" that an important email is on its way. Absent the occasional urgent need, it simply is not good business practice to assume that everyone else so badly manages their time that they check their email every second of the day.

Schedule specific times during the day to process your email. The first thing in the morning, after lunch, and then late in the afternoon are good times and are frequent enough that you are not likely to miss an important email. As you open each email message, take one of the following actions (in this order):

Throw it Away (Delete It)

Delete unsolicited email, SPAM, email from unknown sources (especially if they have attachments), jokes, newsgroup and email list serve messages, and other email that you may or may not glance at but have no reason to keep. You will be surprised at how much of this type of email you receive, and quickly deleting it is a good start to overcoming the overwhelming flow of email. As you process this type of email, send a friendly, but firm email to your brother-in-law and others asking that they not send you any more jokes, and make sure that you are taken off any email lists or newsgroups that you really don't need. It is a general and good rule not to respond to SPAM, even if you are requested to do so in order to be removed from the spammer's mailing

list. This is often a trick that is used by the spamming party to confirm that your address is still a valid email address to be sold to others.

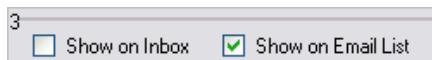
You can also use Outlook's Rules feature to move this type of email into folders (this is the one time folders are ok) where you can handle and dispose of this type of email later when you have scheduled less important time to do this.

File It

If no action needs to be taken based on the content of a received email message, but you want to keep it for later reference, you will want to "file" it in Time Matters. In order to understand how to "file" an email, you first need to know what happens to an email message when it is Connected from Outlook into Time Matter.

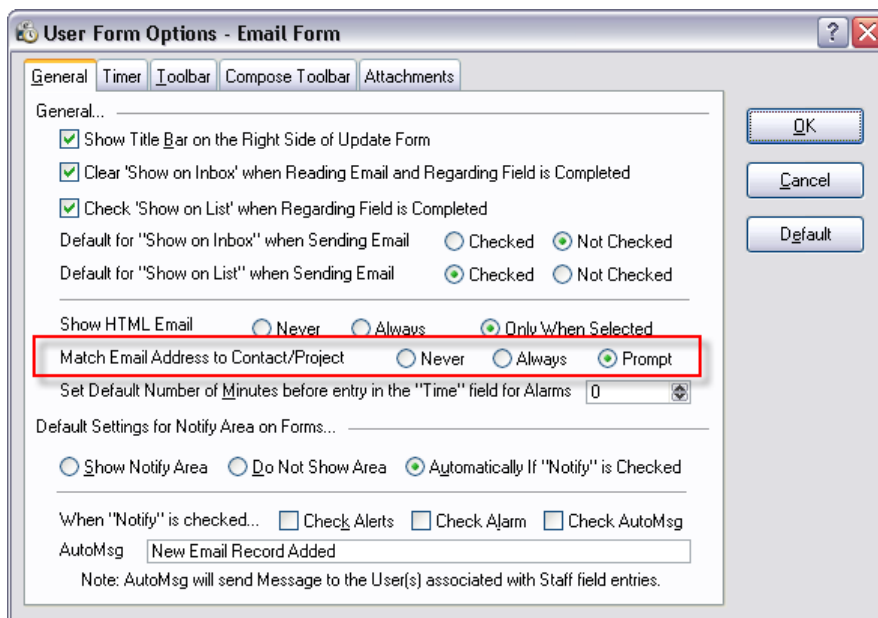
Settings

When an Email record is created in Time Matters it can be stored in the Time Matters Inbox, and/or in the Email List. A Time Matters Email Form has two checkboxes that control where it goes:



Because you are using Outlook as the Inbox, the new Time Matters email that is created when the Outlook email is connected has the **Show on Email List** checked. Because this is done automatically, there are no settings for you to adjust.

You will want to turn the auto-matching feature on. This is accomplished in the **User Level Form Options**:



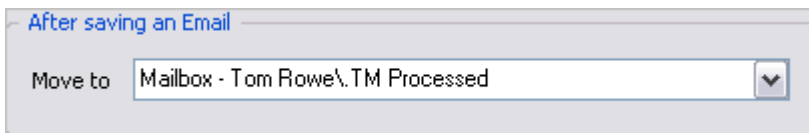
Make sure that the **Match Email Address to Contact/Matter** radio button is set to **Always** or **Prompt**.

- **Always** - if you set it to Always, and Time Matters locates one matching Contact or Matter, it will automatically complete the Regarding fields of the email without user intervention. If it finds more than one match, it will prompt you to choose which Contact or Matter you want to relate the email to.
- **Prompt** - if you set the option to Prompt, you are always prompted when any match is found. This is my personal preference as it gives more control over making sure the email is assigned to the correct records, and lets you more easily relate it to multiple records.

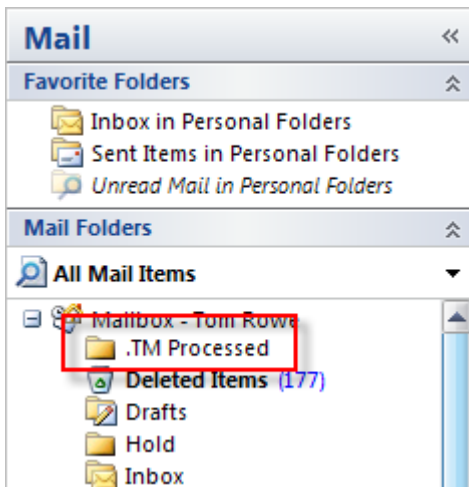
With these options checked as illustrated above, when you TM Connect the email from Outlook, a quick search of the Contact and Matter databases will be conducted. If a match is found, and/or you are prompted, the Regarding field(s) will automatically be completed. When you press **Save & Close**, this effectively relates the email to the appropriate Contact or Matter, and is the equivalent in Outlook of dragging the email to a Case or Contact folder.

Removing from your Inbox

Looking at the paper analogy, once it is filed it is off your desk. That means that when we file the email, we want it out of our Inbox. To accomplish this, you need to specify the folder that you want to move the email to once it is connected. From the Time Matters tab of the Outlook Options, specify a folder – in this example, you see a **.TM Processed** folder:



When the email is connected, it is moved into this folder:



Using this feature, as you go through your Outlook Inbox, TM Connecting it into Time Matters, your email is automatically move to the **.TM Process** folder and you will have less and less email in the Inbox until it is empty.

Reply To It

If you have scheduled time to reply to your email, do so at this time. Keep your replies short and concise, but do not use Internet abbreviations and observe standard business etiquette just as you would if you were drafting a letter.

If you are only doing a quick run through your email, or have not scheduled enough time to properly compose your replies, consider transferring the emails to a “To Process” folder. While our goal is to dramatically reduce (or eliminate altogether) the use of folders in Outlook, a “To Process” folder can be used to make sure that your Inbox is kept empty and that you have a temporary place to put email until you have scheduled time to compose your replies. You should only use such a folder if you regularly schedule part of your day to process email. The folder should be empty most of the time ... certainly by the time you leave the office each day.

To reply from Outlook, you need to do so before you TM Connect the received email. Otherwise, it will be moved to the .TM Processed folder first and you will have to go to that folder to Reply.

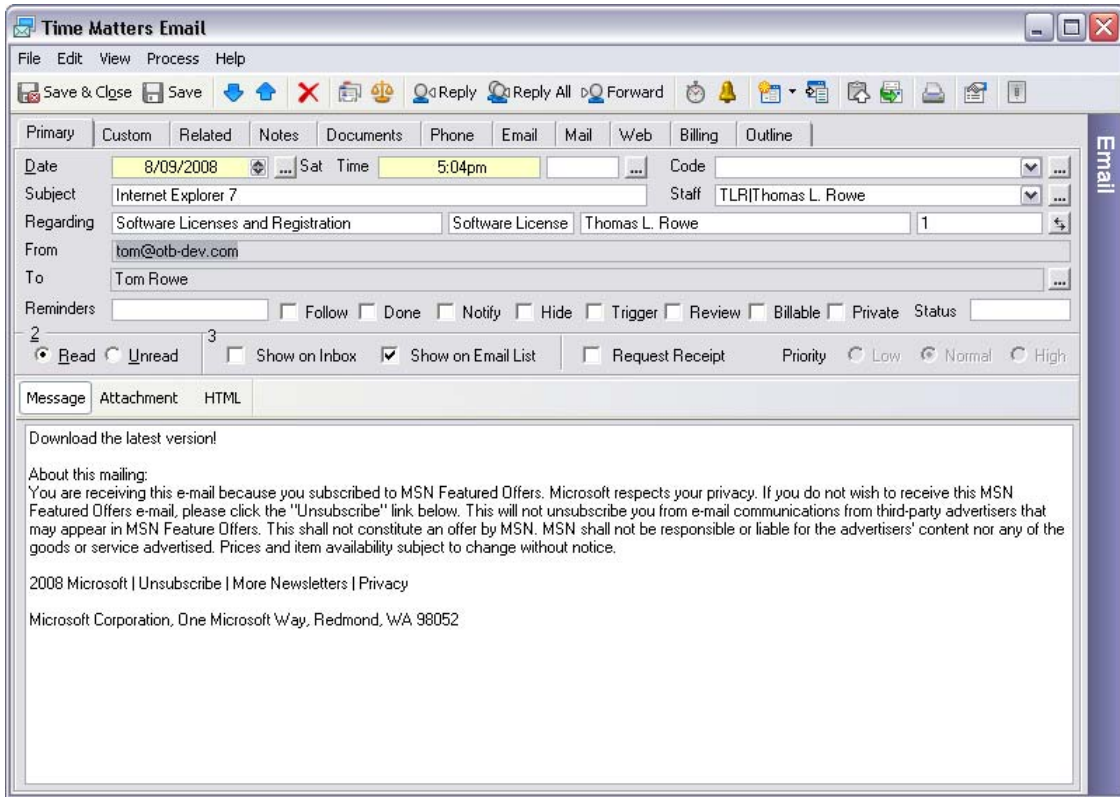
Because you are composing a new email when you reply, you will be prompted once the Email is sent as to whether you want to save a copy in Time Matters. If you want a record of the reply that can be located later, respond to the prompt in the affirmative. Once the reply is sent, TM Connect the original email, using the auto-matching feature to file it related to the correct Contact(s) and/or Matter(s).

One possible course of action you can take when you reply from Outlook is to make sure the original received email is quoted in the body of the reply. Then delete the original email. This has the advantage of letting the reply serve as one record in Time Matters that includes the content of both emails, reducing the number of email that is related to a particular Matter. The obvious disadvantage is that you don't have a true “To and From” audit trail of all the email sent and received.

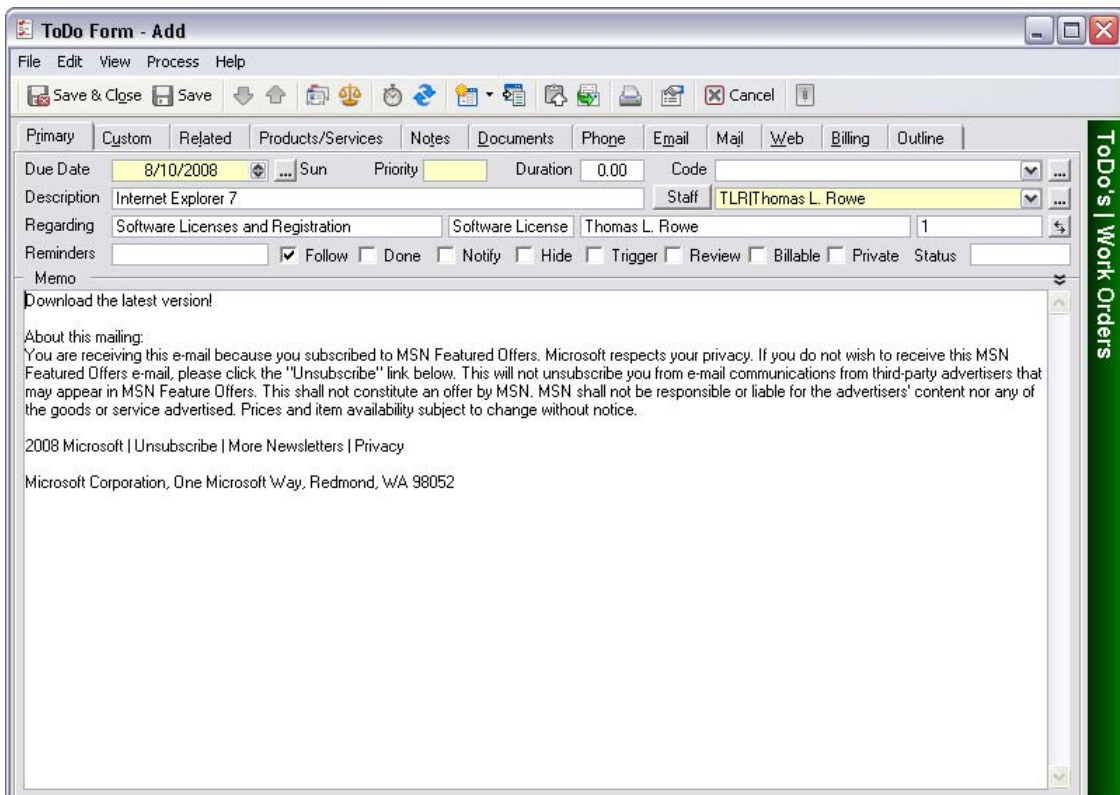
Act On It – Create a ToDo, an Event or Delegate It

An email will often require that some type of action be taken. If it is not something that you can accomplish quickly, you need to add a ToDo or an Event. A ToDo lets you set a priority, classify it and set a due date – things you can't do with an email message in the Inbox. An email might confirm a meeting, or inform you of an upcoming deadline. You can quickly add an Event to your calendar, using the information that is contained in the email to establish the date, time and other relevant information. If the email calls for action by someone else you work with, use the Time Matters delegation system to assign the task to the appropriate staff member.

To add a ToDo or an Event, the first step is TM Connect the Outlook email. This will match the sender's email and fill in the Regarding fields.



Then, before pressing **Save& Close**, if you want to add a ToDo, press the **Add ToDo** button you've added to the Main Toolbar, or press **Ctrl+Shift+T**.



A new ToDo opens, using the email Subject for the ToDo's description field, and the body of the email message is copied into the ToDo memo. Because you filled in the Regarding fields when you opened the email, Time Matters' inheritance makes sure that the Regarding fields of the ToDo are filled in. Moreover, because both the email message and the ToDo are related to the same Contact and/or Matter, if you need the email that created the ToDo, you simply press the Email tab located across the top of the ToDo and you can access the email to read, reply or forward.

Refer it To Someone Else

When you first start using the RAFTing system, your first thought when you want to refer an email to someone else who is better suited to handle it is to forward the email to them. The problem with that is that you are adding a second email record, and you've already started the process – don't make someone else "touch" the email when you can quickly turn it into a ToDo and delegated it to them. In this manner, you are more efficient in your use of email records, save the other person the office time, and now have delegation tracking capabilities to ensure that the task is completed in a timely manner. For more information on how to configure Time Matters to handle task delegation, see the OTB Consulting Paper on Task Delegation.

By "filing" the email and then creating a ToDo for someone else, the email is moved out of your Inbox.

Conclusion

By using the RAFTing technique, instead of using your Inbox as a pseudo ToDo List, you now have Events and ToDo's in Time Matters to help you manage your day. You've been able to easily and efficiently delegated tasks that are required by your emails to people who are better suited to complete the tasks – and you have a system to make sure the work gets done. And, most importantly, at the end of each day you have an empty Outlook Inbox, relieving you of the stress of knowing there are hundreds of things that need to get done that are hiding and/or buried in your Inbox.

Email Bankruptcy

No matter how good you get at RAFTing your email, circumstances will conspire against you and at some point in your busy life you will get behind in the processing of your email – sometimes way behind. Having hundreds of emails sitting in your Inbox is a sure-fire way to kill your productivity, and you will likely get even further behind because you are less productive. In many ways, this is analogous to the problem that people find themselves when they get behind financially. As they fall behind, they have good intentions to get caught up ... any day now. But, the further they go in debt, the harder they find it to dig themselves out of debt, often resulting in them making bad decisions.

The situation is so analogous that the concept of "email bankruptcy" has emerged. First discussed on the Internet in 2004, executives who found themselves so totally buried under thousands of emails simply threw up their hands, declared email bankruptcy by sending an email to all their colleagues telling what they were doing and requesting that any email to which they had not been sent a reply be resent. In all of these scenarios, the email users declared Chapter 7 email bankruptcy – total liquidation – they just deleted their email after sending their message.

For articles on this phenomenon:

<http://www.wired.com/culture/lifestyle/news/2004/06/63733>

<http://valleywag.com/tech/trends/declaring-e+mail-bankruptcy-254608.php>

http://www.washingtonpost.com/wp-dyn/content/article/2007/05/24/AR2007052402258_pf.html

<http://www.lifehack.org/articles/communication/how-to-avoid-email-bankruptcy-5-rules-that-work.html>

I am actually a big fan of this idea, yet I propose an alternative – a Chapter 13 email bankruptcy in which you reorganize instead of liquidate. As good as I am at handling my incoming email, there simply are times when I have not been able to allocate the time needed to handle everything that was received. In fact, I have to admit to having declared Chapter 13 email bankruptcy twice in the past 5 years. Sometimes it just happens.

How to do a Chapter 13 Email Bankruptcy

Instead of deleting all your emails, you are going to reorganize. Create a folder in Outlook called Chapter 13. Drag every last email from your Inbox into that folder. Amazingly, you now have an empty Inbox. Immediately apply the principals you've been taught in this paper to make sure that your Inbox is empty at the end of each day. Then, go into your Chapter 13 folder once a day for 5 minutes and RAFT as many emails as you can (or set a limit - 10-20 emails). Start by going through as rapidly as you can and Toss/Throw Away what you don't need. Then go through and File everything you can that doesn't need to be Acted On or Referred to someone else. Finally go through and create your ToDo's and Events for yourself and those to whom you delegate.

You will be surprised to find that you have already handled many of the tasks the emails require, and that it won't take you as long as you thought to get through them. In the meantime, you have the advantage of a clear mind and a clear Inbox.