***A VETTER WAY®***

**TO GAIN CONTROL OF YOUR E-MAIL**

**AND COMPUTER FILES**

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***GLOSSARY***

***Terms you need to know.***

**Action**  Anything you intend to work on or do, now or in the future. Everything you keep in your office, both electronic and paper, is either an Action or a

Support.

**Category** A grouping of similar or like items. Categories are broken down by a subject. There are both Action and Support Categories. Categories are used for both electronic and paper storage of information. The key is to ask “What is it?”

**FADS** The only four places information can go from your e-mail Inbox: Forward,

Action, Delete, Support.

**Files** Both Action and Support Categories are made up of these. Support

Categories can either be electronic/paper (in a hanging folder) or non-

paper items (on a shelf or in a drawer).

**OATS** The only four places information can go from your desk Inbox: Outbox,

Action, Trash, Support.

**Processing** The sorting, prioritizing and categorizing of all of your information. No

work is accomplished when you Process information. You Process your

e-mail Inbox, your voice mail, your desk Inbox, your Handheld, and any

other source of incoming information.

**Producing** Creating results and accomplishing work. Never Process and Produce at

the same time (multitasking).

**Quiet Time (QT)** This is your most important time of your day. Your day needs to revolve around it. It is 20% of your workday that is completely uninterrupted. Take

your QT at the same time every day. Work on your 1-5’s in your QT.

**Reference** **Category** A Support Category which includes miscellaneous files that don’t easily

fit into any of your other Support Categories. All Support Categories

originate from your Reference Category.

**Support**  Any information that you refer to. You have no intention of doing anything

with Support items or working on them. Support Categories can be either

electronic/paper or non-paper.

**Windows Explorer** This is where you store all of your non-Action information that you want to save and refer to. You will have twelve or fewer Support Categories

(folders).

***PROCESSING AND PRODUCING***

***Process information three times a day. Produce work three times a day.***

**PROCESSING** **(Information)**

**Daily**

1. **Three (3) times a day go through your:**
2. E-mail
3. Voice mail
4. Smartphone

MCj02506570000%5b1%5d

**Weekly**

* **Once (1) a week**

On the last day of the week, review all of your four Action Category files. This allows you an awareness of what needs to be done and an opportunity to set up the following week’s tasks and activities.

**PRODUCING (Work)**

**Daily**

* **Once a day, work from each of the following three Action Categories:**
* **Calendar** – Work on those tasks that must be and can only be done today.
* **Batch** – Batch and work on similar tasks in the same time period. Work on those tasks that you repetitiously do, either daily, every couple of days, or weekly. Think of assembly line work.
* **To Do** – Important and impactful tasks. Tasks that you can do before they are due. Steps from a Project. Work on these tasks in your Quiet Time (QT).

🗁 Resist the urge to immediately work (Produce) when presented with a lot of things to do. Instead, become aware (Process) of everything that needs to be done first.

🗁 In summary, ***Process***information three times a day and ***Produce***work by working from your To Do, Batch, and Calendar Action Categories daily.

🗁 When you Process information, you organize it, prioritize it, categorize it, and classify it. What you don’t do when you Process information is Produce work.

|  |
| --- |
| 1. Never mix \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ with \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ only 3 times per day.  3. Process before you \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |

***E-MAIL INBOX***

***Your Inbox needs to be completely emptied after Processing it.***

**What you don't want to use your Inbox for:**

* As a place to work from.
* As a place to store items in.
* As a place to leave items without making a decision on them.
* As a place for things that you are waiting for from others.
* As a place for items that you don’t know what to do with.

**What you want to use your Inbox for:**

* A temporary centralized location to receive information and messages.
* A centralized place that allows you to drag tasks to an Action folder in your e-mail program, Forward messages to others, save messages to Windows Explorer, and delete messages that are trash.

**5 STEPS OF YOUR INBOX**

1**. Stand.** Stand up. It is a lot quicker than sitting down.

2. **FADS.** Ask yourself whether the item is a **F**orward, **A**ction, **D**elete or **S**upport (save).

3. **Decide the Category.** If the item is an **A**ction (a task) or a **S**upport (reference information), decide the Category name and the File name you will drag it to.

4. **Use all of your senses.** Say the five steps out loud. For example, “Stand, Support, Financial, Budget.” Hear yourself say it, see it and touch it. The more senses you use when going through your Inbox, the greater the chance you will have of remembering where you stored it.

5. File it away. Drag the message to the folder or file location you want.

* Process your e-mail Inbox three times a day.

1. Check your Inbox only \_\_\_\_\_\_ times per day.

2. The key to your Inbox is in your ability to make \_\_\_\_\_\_\_\_\_\_\_ and not \_\_\_\_\_\_\_\_\_\_\_ it.

***FADS***

# *Inbox e-mails only go to one of four places: FADS (Forward, Action, Delete, Support)*

# inbox

**FORWARD A**CTION **D**ELETE **S**UPPORT

**Send it Categories/Files Trash it Categories/Files**

Your e-mail Inbox needs to be completely emptied the same way your desk Inbox needs to be completely emptied. Items in your desk Inbox go to **OATS.** E-mails in your e-mail Inbox go to **FADS**.

There is a **F**orward (**Outbox**) and a **D**elete **(T**rash) already in your e-mail program. You need to create four **A**ction Category folders with their respective folders under the existing Inbox folder. Save your **S**upport e-mails into a **S**upport Category under Windows Explorer/My Documents or your shared drive.

Information moves the same way from your e-mail Inbox as it does from your desk Inbox. E-mails go to one of the following:

**F**orward **F**orward it. This is the equivalent of using a yellow sticky on a piece of paper in

your **Outbox**. Type one sentence or less.

**Ac**tion Drag the e-mail to one of the folders under your four **A**ction Category folders in

your e-mail program.

**D**elete **D**elete it.

**S**upport Save the e-mail to a **S**upport Category under My Documents or a shared drive in

Windows Explorer.

1. All e-mails go to one of the following places: \_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_,

\_\_\_\_\_\_\_\_\_\_\_.

***COMPUTER***

***You will have the same electronic and paper Support Categories.***

Use the same system for all of your information storage and retrieval. Ultimately, the goal is for you, your group and your entire organization to use a standardized information system of storage.

**Setting up your one directory**

Your goal is to store all of your Support Categories in one directory. That directory in Windows Explorer can either be My Documents or your shared drive. Not only is it easier to access all of your files in one directory, but it is also easier to back them up.

Type your new Support Category names in Windows Explorer under the drive that you will be using to store your information in. Normally it would be under My Documents. Use an underscore (hold the shift key and hit the \_ key) in front of each of the Category names such as \_Reference. This will move the Category names to the top of the list of directories and files on the page that are already there.

**Once your Support Category folders are set up**

Once you have all of your new Support Category names typed with an underscore, you will be able to start saving existing files, new e-mails, and new documents under one of your new Support Category folders.

When you need to access an existing file, decide if you want to save it. If so, save it under one of your new Support Category folders. Eventually, you will have gone through most of your old files. The remaining files have a good chance of needing to be deleted. When cleaning out old files and moving them, move only one at a time—rather than moving an entire grouping of files (folder) at the same time.

From then on, when you open and then save a document (File, Save As, select the \_Category name, type in the file name), or save an e-mail (File, Save As, select the \_Category name, type in the file name, Save with .msg), it will be saved under one of your new Support Categories.

**Software programs on the Taskbar**

You will want an easy way to access the software programs that you use a lot. You can do this by creating a place for your software program icons on your Taskbar.

Pick out the software programs that you want available on the Taskbar. The first two that should always be available and open are your e-mail program (Action) and Windows Explorer (Support). You can add software program icons to the Taskbar by dragging and dropping the icons from your desktop.

***E-MAIL TIPS***

* **Create an electronic note card reminder in your e-mail program.**

Instead of using paper, you can create an electronic note card reminder in Microsoft Outlook 2013. Then you can drag your reminder note card into one of your Action Category folders (Call; E-mail; Read; Talk with) for tasks that you need to do.

Here’s how:

1. Select the specific Action Category folder in which you want to file your task (such as in Batch [folder]/Call [folder]).
2. Click on the Home tab on top.
3. Click on New Items in the New group.
4. Go down to More Items.
5. Click on the New Post in This Folder icon.
6. A page will appear (this is your electronic note reminder that you can use like a 3x5 paper card but better).
7. Type in the action you want to take in the Subject line, such as Call Martha.
8. Click on the Post icon on the left.

By doing this, you will create a reminder note (a task) in the folder you selected in your e-mail program reminding you of a task you need to work on. Electronic note cards allow you to stay paperless and eliminate to-do lists. These can be used for voice messages eliminating paper lists of people to call back. They can also be Forwarded to someone or saved as a Support document.

* **Keep an extra e-mail to manipulate by using a Bcc.**

When you send an e-mail, here’s how to create a Bcc… in Microsoft Outlook 2013 so you can have it when you need it

1. Open a new e-mail in Microsoft Outlook 2013.
2. Click on the Options tab on the Ribbon Bar on top. In the Show Fields group, click on the Bcc… icon.
3. A Bcc… box will appear above the Subject box.
4. Click on the Save icon on the Quick Access Toolbar so that the Bcc…will appear every time you click on a new e-mail.
5. Type in your e-mail address.

There are many ways to use the Bcc… to your advantage. One is drag the duplicate e-mail to the To-Do Bar (Calendar) on a specific date that you have a meeting or call. Remember that same e-mail was sent to the person you have a meeting or call with. This enables you to have that information available on that date. (It’s always good to have the facts.)

Or after you send an e-mail, the Bcc…can act as a reminder for you to work on something in preparation for a meeting. Move the duplicate Bcc… e-mail to the To Do A folder to work on. When completed, drag it to the meeting date so you will have it available. The possibilities are almost endless.

* **E-mails can go only to one of four places: FADS.**

Information from your e-mail Inbox flows to four places the same way as it does from your desk Inbox. All e-mails go to one of the following:

**F**orward **F**orward it. This is the equivalent of using a yellow sticky note on a piece of paper

in your Outbox. Limit it to one sentence.

**Ac**tion Drag the e-mail to one of your **A**ction Category folders in your e-mail program. Or

print out the **A**ction and place it into your desk Inbox.

**D**elete **D**elete it.

**S**upport Save it in a **S**upport Category folder in Windows Explorer.

* **Reply to your e-mail messages later.**

In Microsoft Outlook 2013, create a folder called Reply under your Batch folder in the Folder Pane on the left. Rather than replying to your e-mails when you read them, drag them to the Reply folder. Later, when you are done Processing (categorizing, sorting, prioritizing) all of your e-mails, you can go back to the Reply folder and reply to all of them.

* **Drag your Support e-mails to Windows Explorer.**

Here is how to drag all of those non-action e-mails in Microsoft Outlook 2013 to Windows Explorer so that only Action e-mails are in Outlook:

1. Open Microsoft Outlook 2013 and Windows Explorer.
2. In Outlook, left click and hold down the e-mail you want to move and save.
3. While holding it down, drag it down and over the Windows Explorer icon that is already open on your Task Bar.
4. Windows Explorer will open.
5. Continuing to hold the e-mail down, drag it to and over the Support Category folder you want to store it in.
6. If the folder you want to store it in is a sub folder, hold the e-mail over the folder above the sub folder for a moment. The sub folder will open.
7. Let go.

Dragging and saving your e-mails this way is extremely fast. The only potential down side is that you keep the original e-mail file name in the event you wanted to change it.

* **Create shortcut icons for your software programs on your Task Bar.**

1. Left click on the round Start icon on the far left side of the Taskbar.
2. Left click on All Programs.
3. Scroll to the Program you want to have available.
4. Left click the Program and drag and drop it onto the Taskbar.

If the icon is on your desktop, and you drag it to the Taskbar, you can delete the icon on your desktop as you will never need to open it from there again. To get rid of an icon, simply right click the icon. Then click on Unpin this program from taskbar.

***THE CATEGORY MODEL***

***A Category is a grouping of similar or like items.***

A Category is a grouping of similar or like files. This is a subject based system. The question to ask yourself regarding where to file or find something is “What is it?”

**ACTION** paprtossor a **SUPPORT** filcbnt

(Tasks to do) (Information to refer to)

There are four Your goal is to create your own Support Categories. Support

Action Categories. Categories consist of a main Reference Category (a place to

keep general and miscellaneous files that won’t fit into one of

your other Support Categories) and eleven other Support

Categories such as:

* + - * + Clients
        + Finance
        + Forms
        + Marketing
        + Personal

By separating all of your Support information into various groups

by subject, you will find that some groups will have a lot of

information while others will have just a little. The groups that have

a lot of information (you can make 5 or more files from them) need

to be made into their own Support Categories. You need to give

these subject areas a Category name such as one of the ones

above or on the following page. You need to be able to answer,

“What is it?”

1. A Category is a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

2. Any files that do not easily fit into a specific Category always go into my \_\_\_\_\_\_\_ \_\_\_\_\_\_\_.

3. There are both \_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_ Categories.