Using Outlook to Distribute and Track Policy

The instructions and screen shots in this document are from Outlook 2003.

IMPORTANT NOTE: For this process to work, the users must also adjust their OUTLOOK settings. Download "End User Settings in Outlook" for instructions.

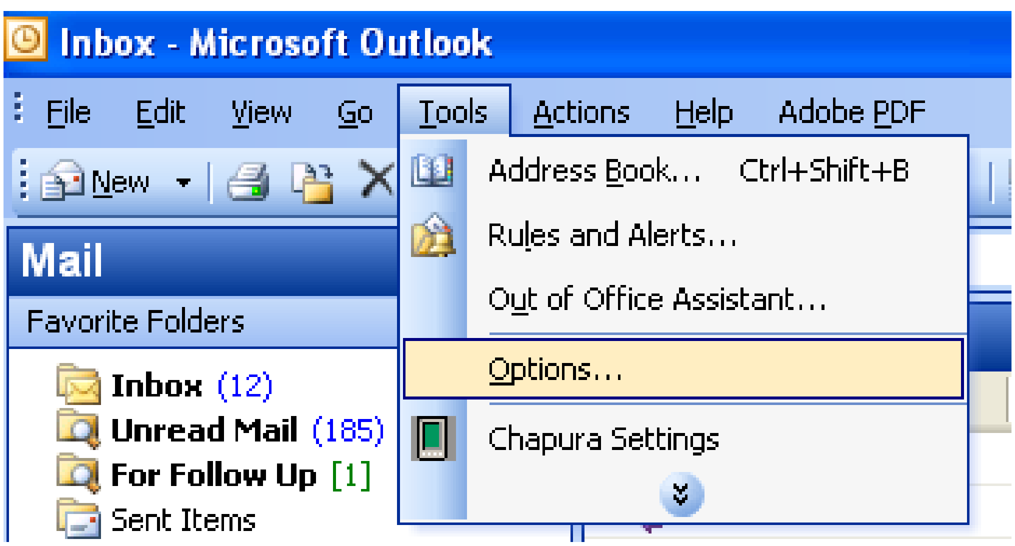
Item #1: Setting up an email account

Users may want to consider requesting an email account that will only be used to distribute policy. This is a nice visual queue for the users that the email contents are a policy that needs their attention. Our account was named "PDTraining" because our training division was responsible for policy distribution and tracking. We do not use that email account for anything else. Our IT Department set up the account and a log in for us.

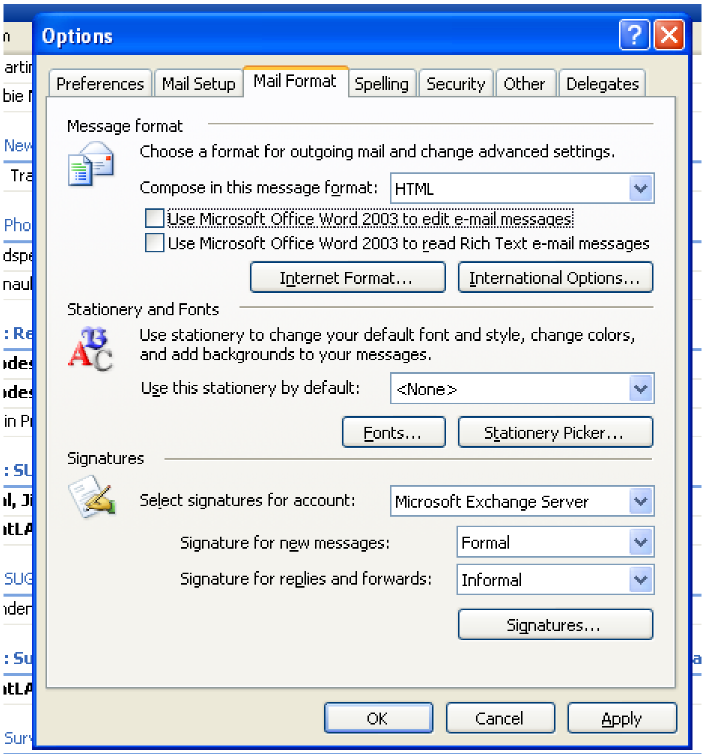
Item #2: Building Templates

Users may want to consider building templates in Outlook for the different types of directives that will be issued. The use of a template keeps the format of policy distribution consistent.

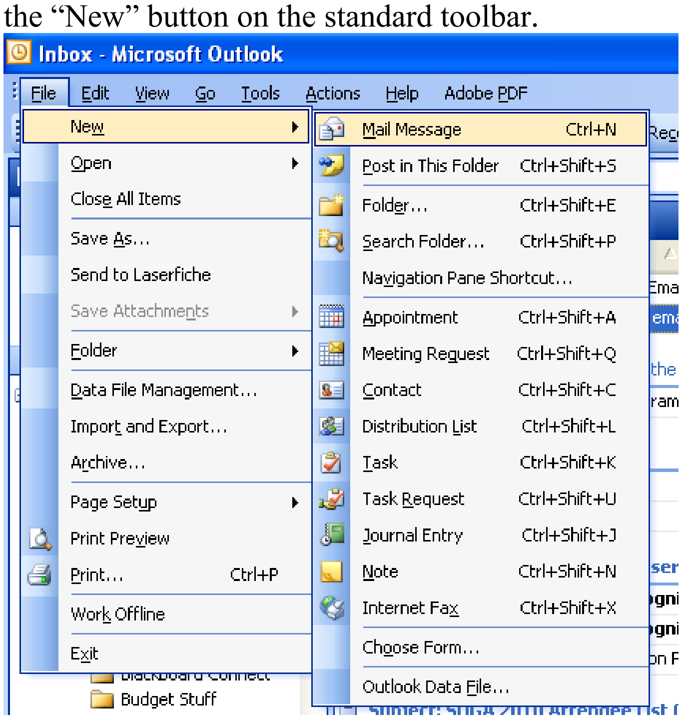
Step #1: You can not create an Outlook template if you are using Microsoft Office Word as your e-mail editor. To turn off Word while designing your templates, while in Outlook go to the Tools menu and click on Options.



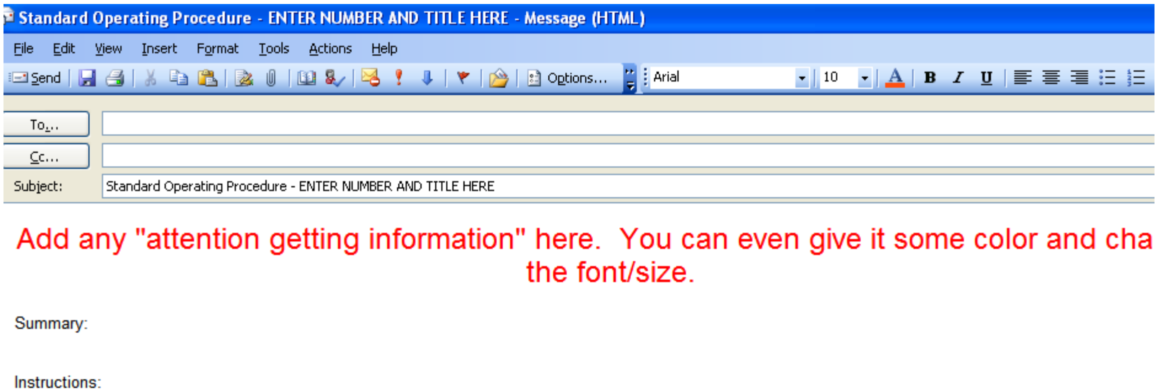
Step #2: In Options on the Mail Format tab, clear the check box next to "Use Microsoft Office Word 2003 to edit e-mail messages". Then click Apply.



Step #3: In Outlook, on the File menu, point to New then click Mail Message or click the "New" button on the standard toolbar.

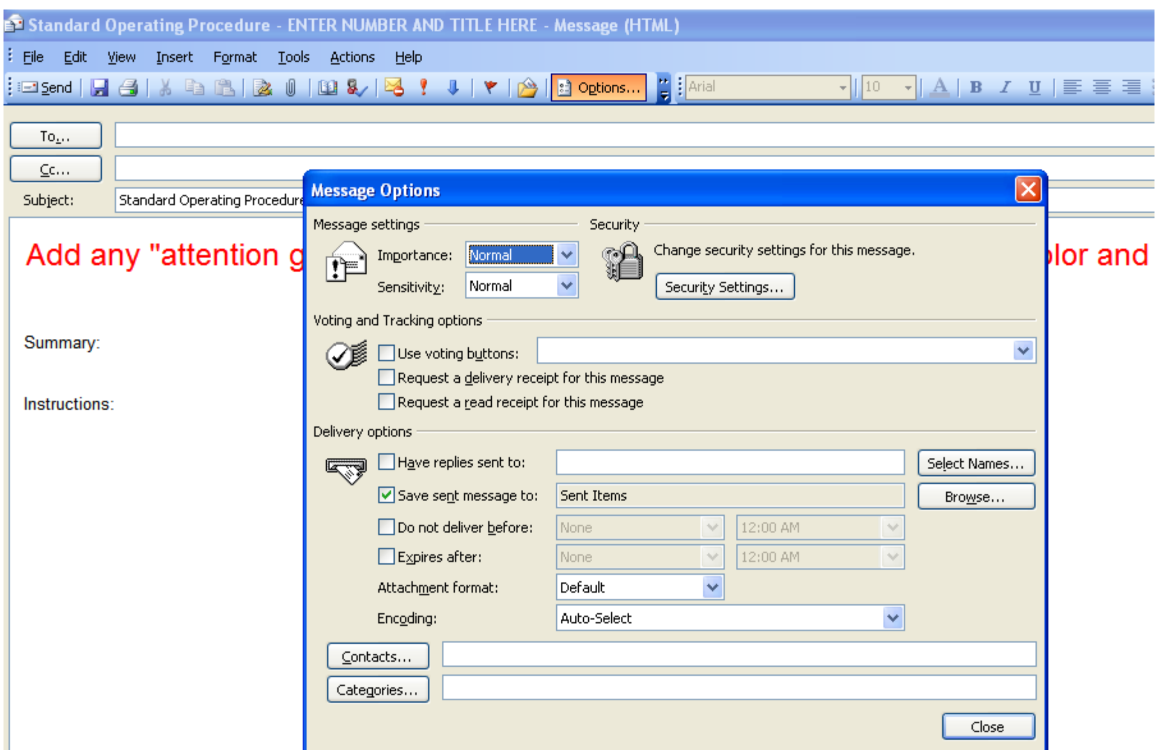


Step #4: When the email message opens give it an appropriate subject and compose your content.



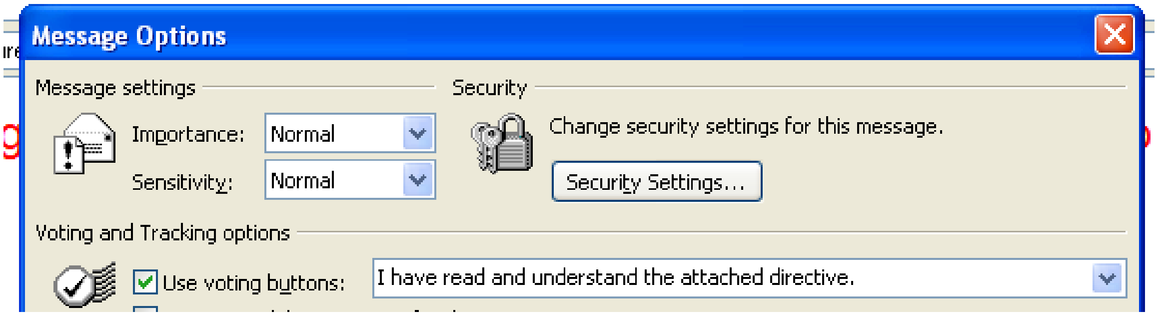
Note: We used the "attention getting" area to remind recipients to actually open the email rather than use the preview pane, send in the read receipt, and to hit the voting button. Some of these features will be discussed later. The summary section was used to give any pertinent information regarding the policy such as significant changes. The instruction section advised recipients to read the attached directive and direct any questions to their supervisors. This area also included the location of the electronically stored official copy of the policies. We made all policies available on a shared drive in our system network.

Step #5: Click the "Options" button on the tool bar to open additional settings.



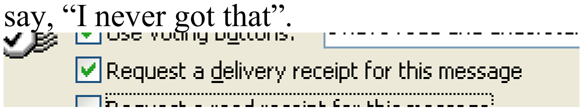
Step #6: Voting buttons

There are some pre-set voting button options in the system using the drop-down arrow at the end of the blank. You are able to create your own button options also. Put the check mark in the box in front of "Use voting buttons:". Either select one of the available options or type in your own options. Since the issuance of policy is not really a democracy, I give only one option-"I have read and understand the attached directive." If there is more than one option they must be separated by a semicolon.



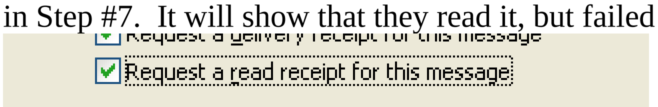
Step #7: Delivery receipt

Checking the delivery receipt option assists you in the future when the recipients say, "I never got that".



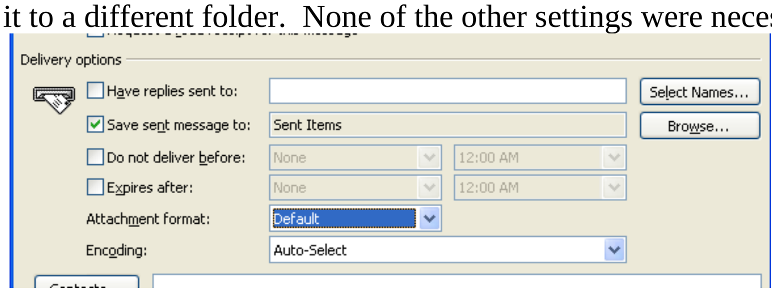
Step #8: Read receipt

Checking the read receipt option assists in the future also with the same issue as in Step #7. It will show that they read it, but failed to vote.

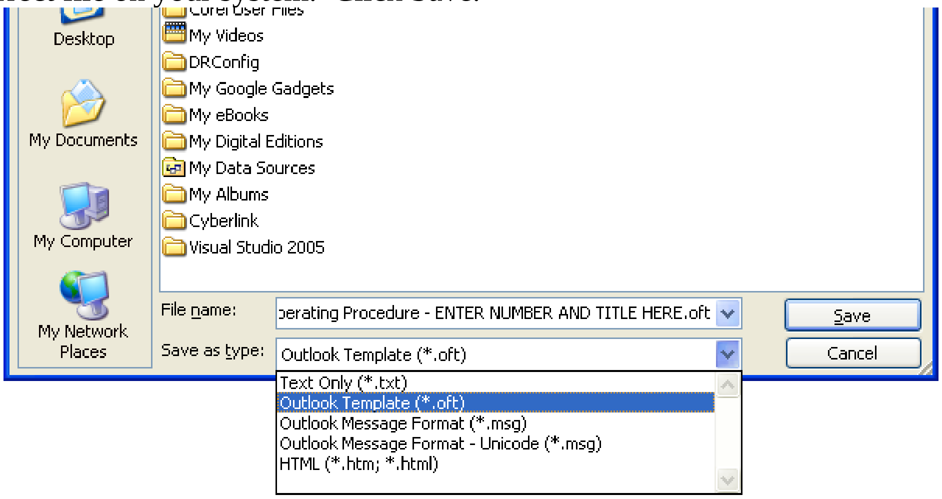


Step #9: Choose your Delivery Options. Since we use a generic email account that all policies are issued from, sending the replies to others was not necessary. If choosing this keep in mind that for everything you distribute you should be getting 2 email responses from each person. So, if you issue one policy to 60 people, you will get one large delivery receipt from the system that shows everyone to whom it was delivered, and then you will get a read receipt from each individual and a "vote" from each individual. So that is 121 reply emails that need to be opened. Further, you can set a time for delivery and an expiration date, if desired and click Close.

NOTE: To appropriately track responses it is necessary to save sent messages to the Sent Items folder. My experience has been that tracking does not work properly if you move it to a different folder. None of the other settings were necessary for our distribution.



Step #10: You are ready to save, but you must save it as a Template. Click File then Save As. The file name will be your subject line (change it if you wish). Choose the "Outlook Template" as the file type. It should automatically be directed to save into the correct file on your system. Click Save.



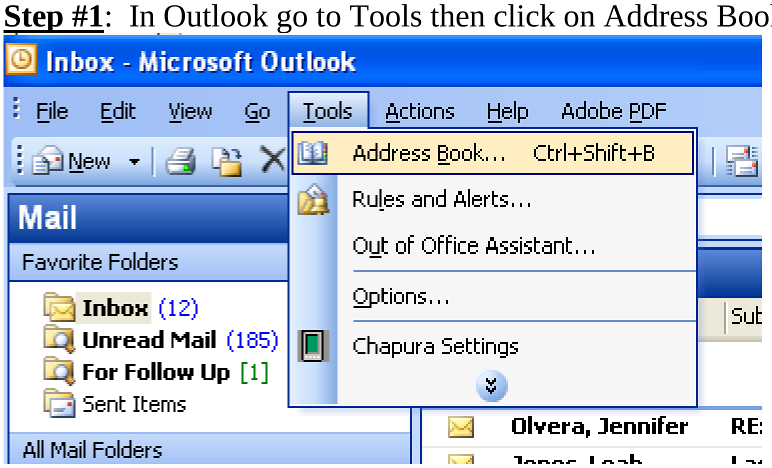
Step 11: Close the message that you used to create your template. If you are prompted to save the message, click No. You have already saved the template and that is what you need.

Follow all these steps to build templates for any other types of policy you distribute. Examples: General Orders, Administrative Orders, Special Orders, Training Bulletins…whatever works for your agency.

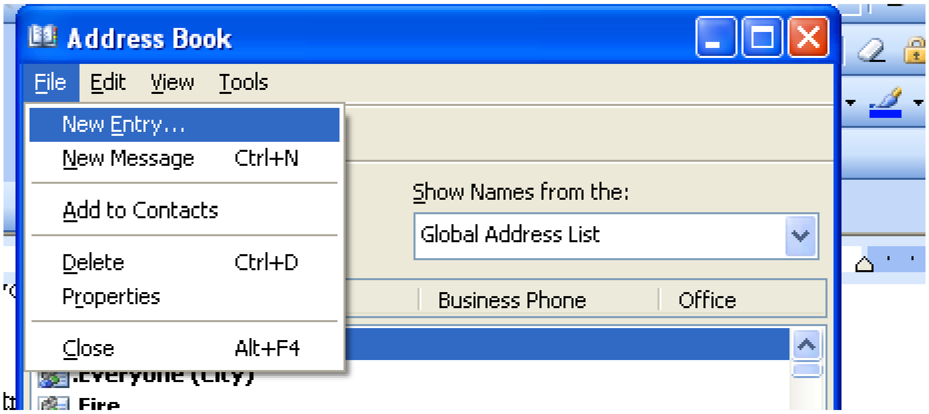
Item #3: Building Distribution Groups

To make policy distribution <u>much simpler</u> and to make tracking <u>very efficient</u>, you need to set up distribution groups <u>in the email account from which the directives will be issued</u>. Some examples might be All Personnel, All Sworn Personnel, Supervisors, Criminal Investigations, Patrol, Traffic, Records, Dispatch…etc.

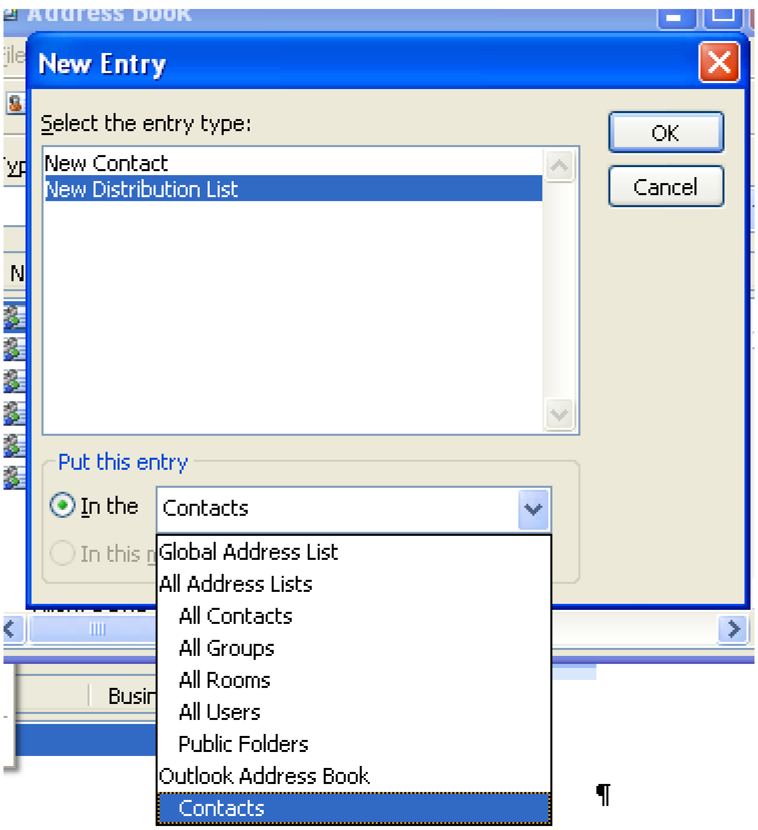
Step #1: In Outlook go to Tools then click on Address Book.



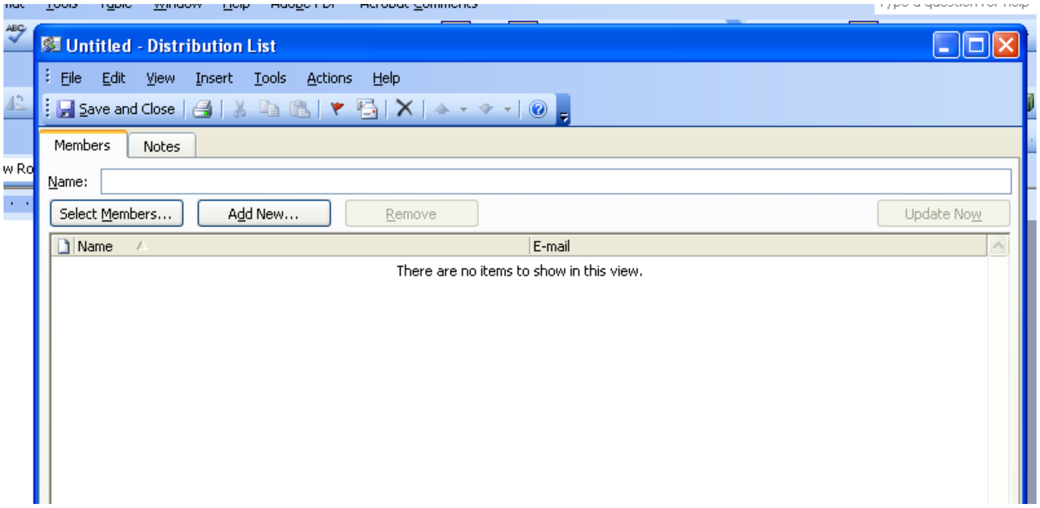
Step #2: In the Address Book window either click on the "New Entry" button on the toolbar or go to File, New Entry.



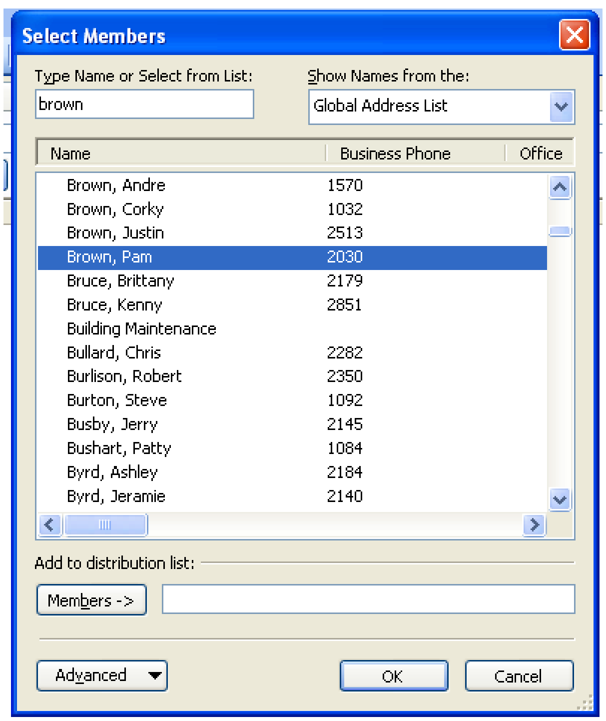
Step #3: Click on New Distribution List and choose where you want the entry to be stored from the drop down list at the bottom. Then click OK.



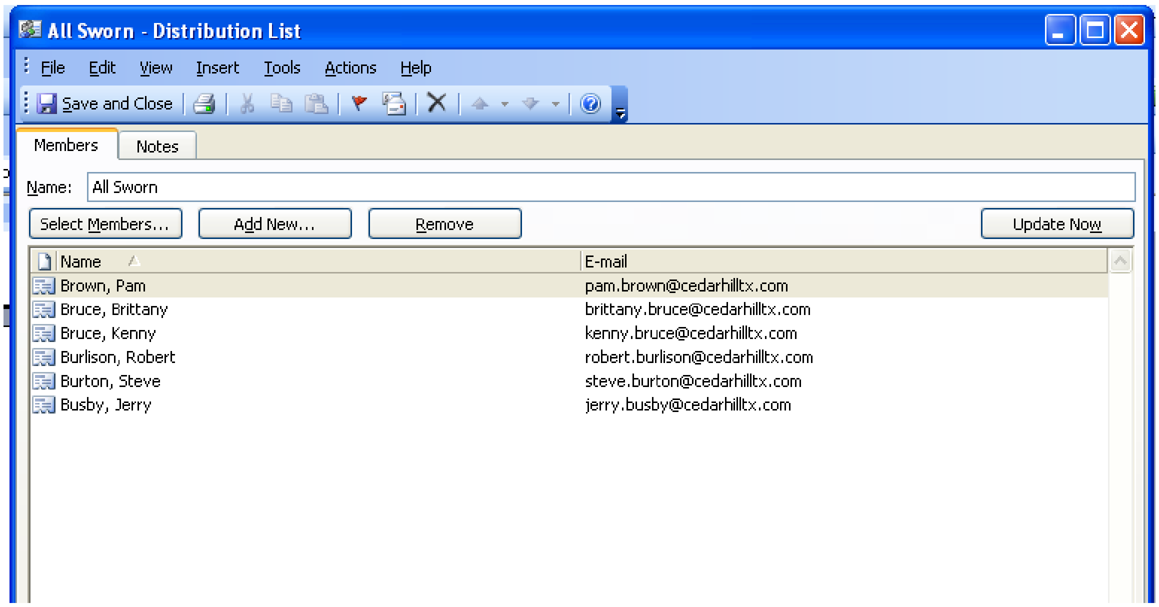
Step# 4: Give your distribution group a name such as All Sworn or Patrol then click "Select Members". These directions assume that all persons to whom policy will be issued are built in your email system.



Step #5: From the Select Members window using whatever list you need (screen shot is showing the Global Address List), you can either type a name into the "Type Name or Select from List:" box or you can scroll down the list to choose names. Click on the name you want to include and then click on the "Members" button below the list OR just double click on the name you want to include and it will be moved into the "Members" list. After you have selected all the members needed for this distribution list, click OK.

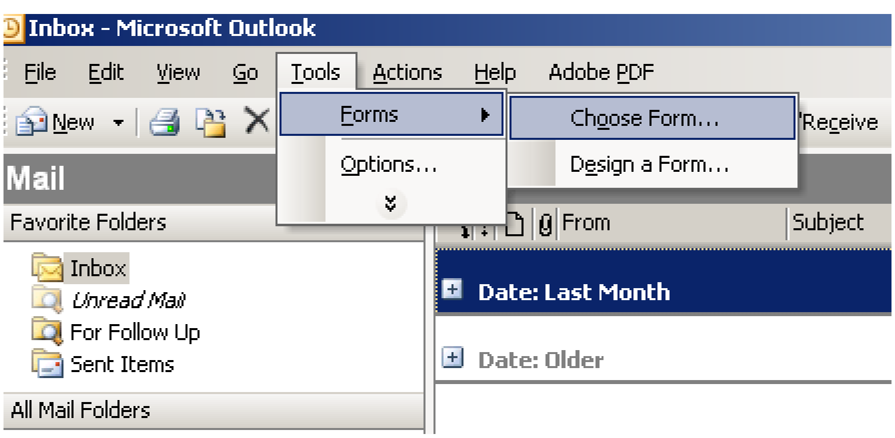


Step #6: The selected persons now appear on the list. If you forgot someone, just click on the "Select Members" to continue to add to the list. If you made a mistake, click on the name you need to remove and click the "Remove" button. When done be sure to hit Save and Close". You now have a distribution list! This really makes life easier when you start to distribute because with a few simple clicks, you can send to everyone on your list rather than having to choose every individual each time. To build other distribution lists just repeat the steps.

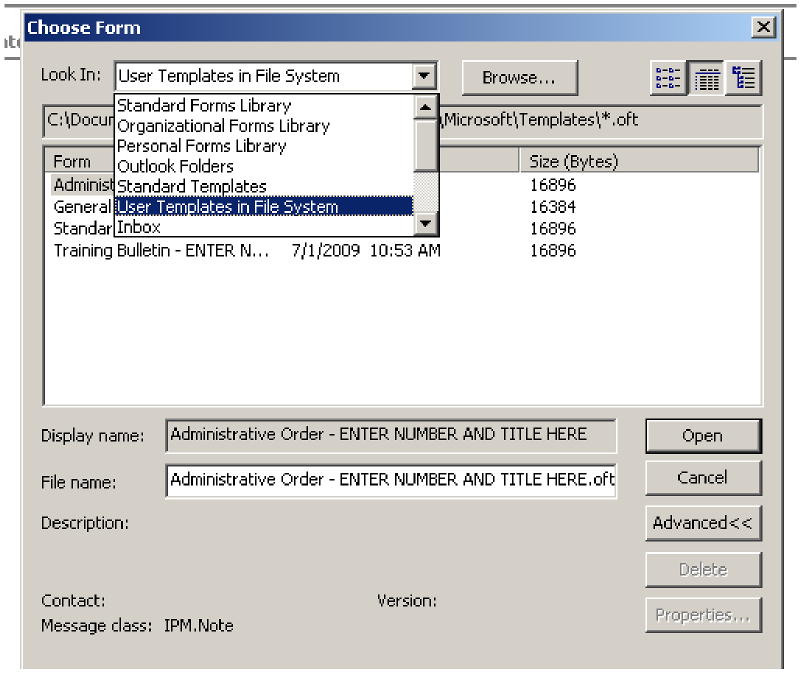


Item #4: Issuing a policy using existing Templates and Distribution Lists

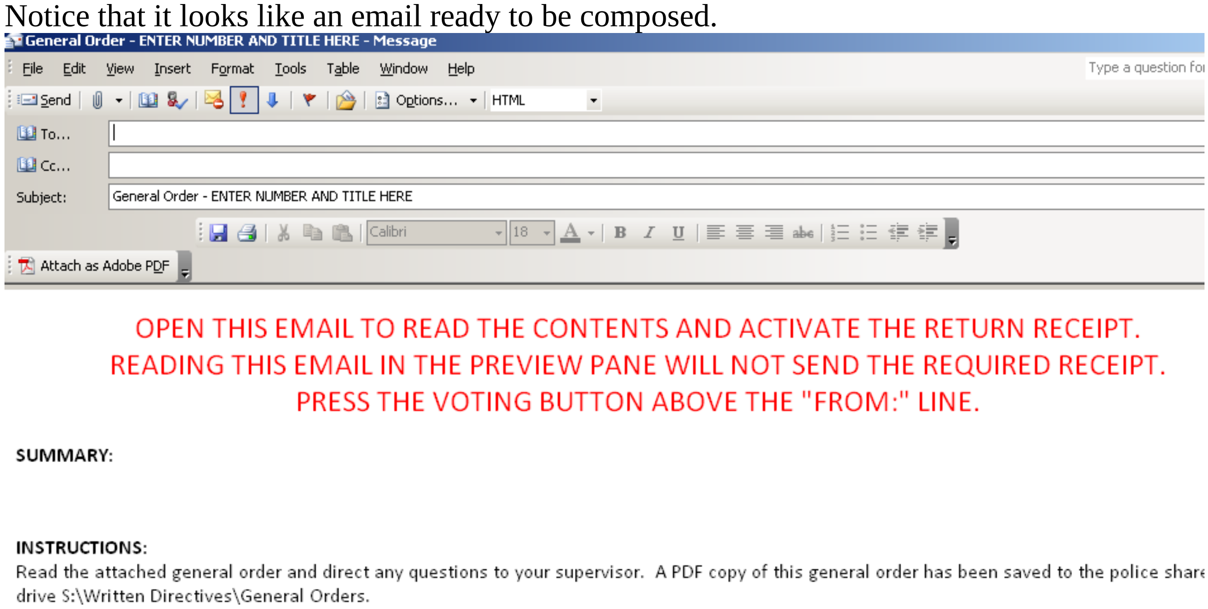
Step #1: Bring up your template. Go to Tools/Forms/Choose Form.



Step #2: On the Choose Form window choose User Templates in File System (or if you saved it somewhere other than the default location you will need to locate it there).



Step #3: Choose the form that you need by clicking it to highlight it and click on Open OR double click the form. In this example, we are showing the General Order form. Notice that it looks like an email ready to be composed.

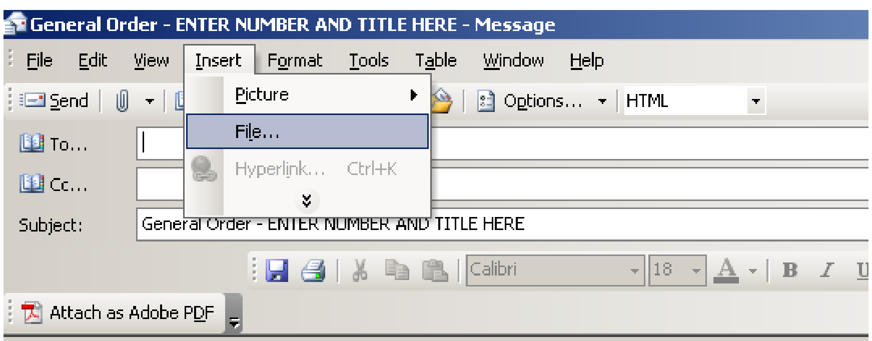


Step #4: Edit your Subject line by adding the policy number and title. Line may look like "General Order 204 –Administrative Investigations". Add your summary notes and any other instructions. I built my templates with standard instructions that did not change. The summary notes changed with each issuance. Add your attachment file-which is the policy/directive that you are distributing.

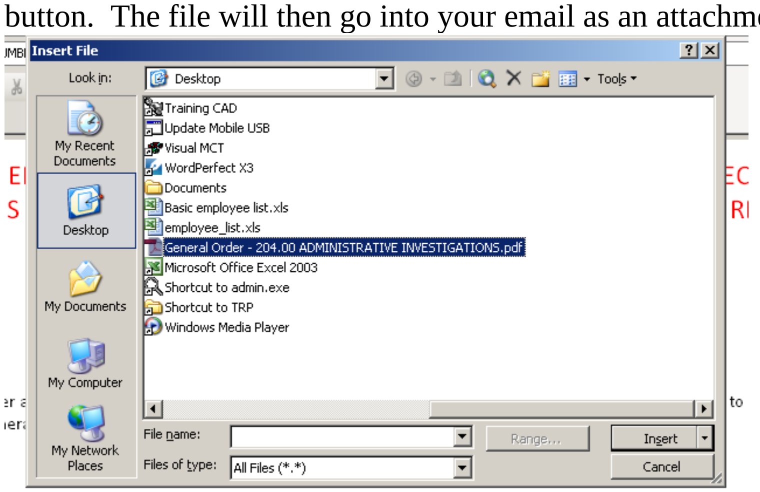
Recommendations:

- ✓ Only issue one policy per email. It makes it easier to track.
- ✓ Insert your attachment file (the policy/directive that you are distributing) before you fill in the "To:" line. It helps prevent you from sending the email without the attachment.
- ✓ Use an email account that is ONLY used for policy distribution. It helps to keep from having other non-policy related emails from getting mingled into the account. We decided to reformat all of our policies during the TRP process. In doing this, we reissued them. I have over 13,000 emails related to distribution and tracking of policies.
- ✓ Manage your distribution lists by updating them every time there is a new person hired, a separation, or a transfer. This will make life much easier.

Step #5: To add an attachment, go to the Insert File icon or click on Insert then file.

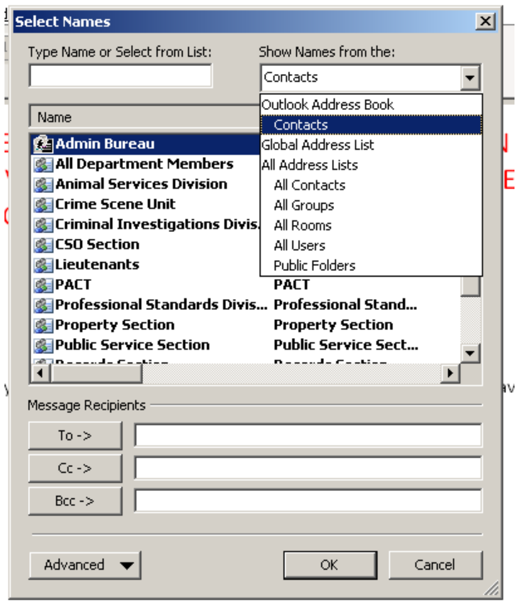


Step 6: Find the necessary file and either double click it or highlight it and hit the Insert button. The file will then go into your email as an attachment.

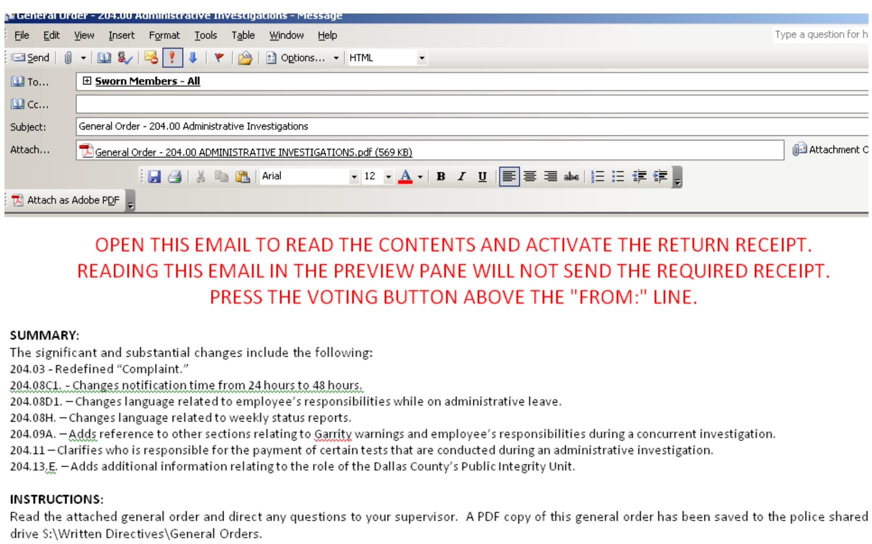


Step 7: Pick a group from your distribution list by clicking on the "To" button and opening the folder where you stored the list (example below has it in the Contacts folder). Either double click on the list needed or click it once to highlight it and click the "To" button at the bottom. Then click OK at the bottom of the window.

Note: If using a dedicated email account then your distribution lists for policy issuance will not be mingled with other business/personal distribution lists.



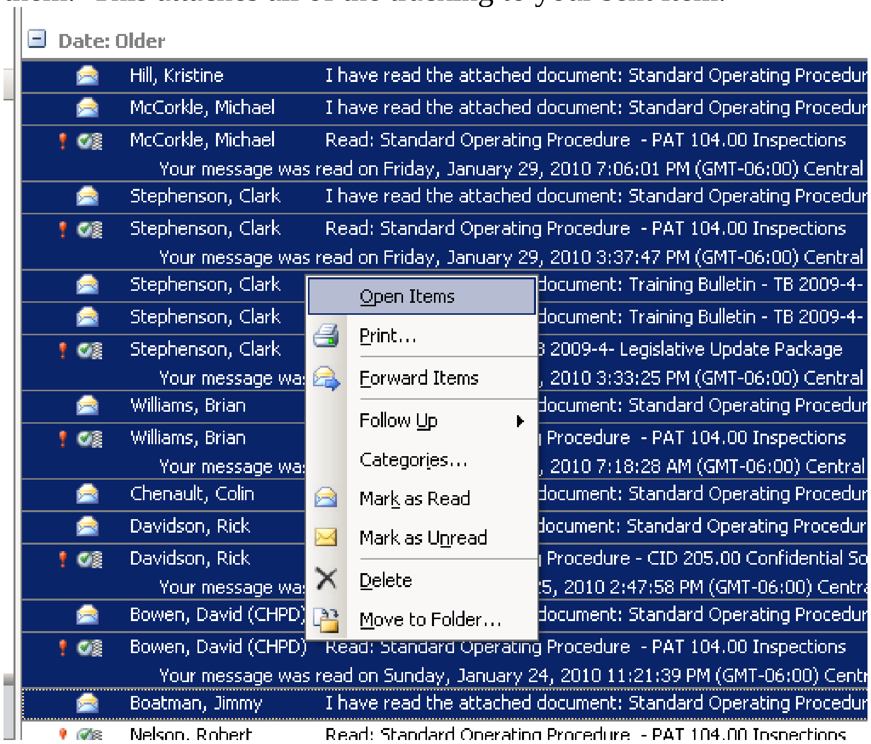
Step 8: Your final product should look something like below. There is no need to set any of the options related to delivery, read receipts or voting buttons because you set all of that when you created your template. You can check on the settings by clicking on the "Options" button on the tool bar. Any changes you make will only be valid for this one email-it will not change the saved template.



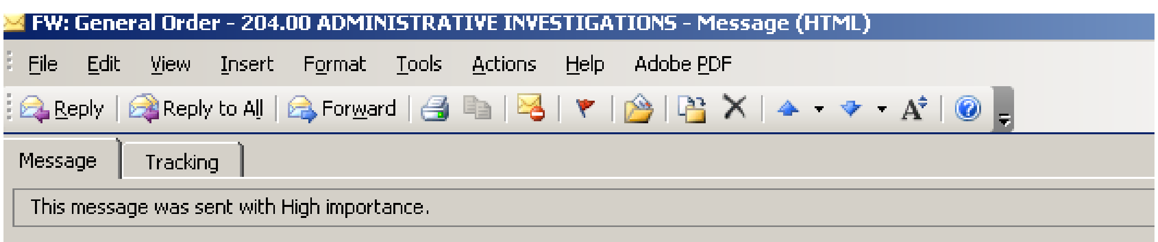
Step 9: Click the Send button. The fun begins when you start getting all of your receipts and votes in.

Item #5: Track the policy.

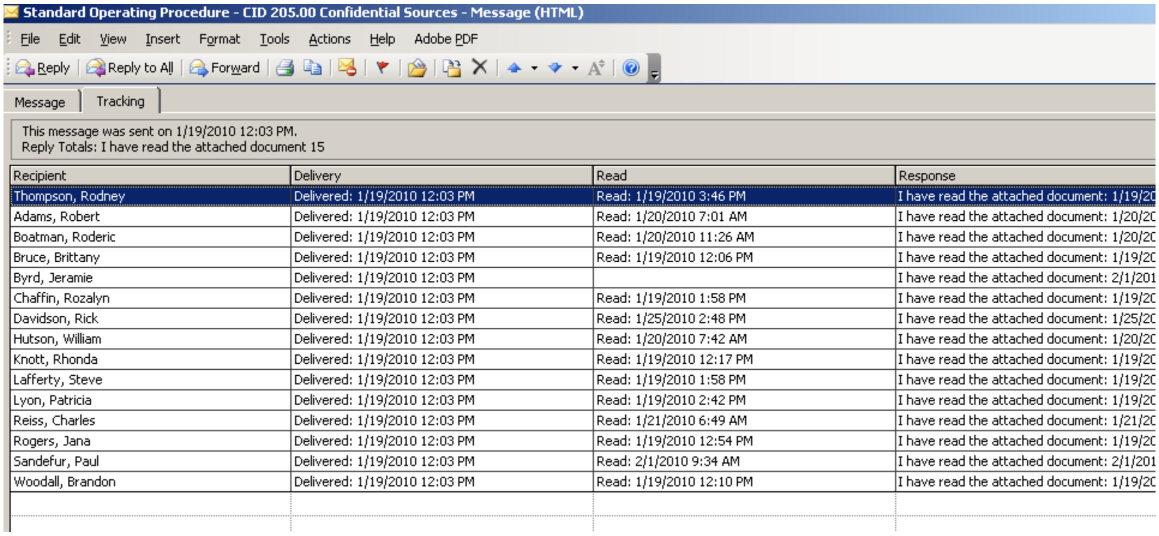
Step #1: Open all of the read receipts and vote emails that you receive to have them attach to the tracking on the email. You can open several at a time by highlighting numerous emails, right clicking then choosing "Open Items". After opening them, close them. This attaches all of the tracking to your sent item.



Step #2: Go to the "Sent Items" folder of your email. Choose the policy that you want to track and click on the Tracking tab.



Step #3: The Tracking tab will show something like below depending upon your settings. This example shows the delivery, read receipt, and vote. Each one shows a date and time that the respective action occurred.



Recipient	Delivery	Read	Response
Thompson, Rodney	Delivered: 1/19/2010 12:03 PM	Read: 1/19/2010 3:46 PM	I have read the attached document: 1/19/20
Adams, Robert	Delivered: 1/19/2010 12:03 PM	Read: 1/20/2010 7:01 AM	I have read the attached document: 1/20/20
Boatman, Roderic	Delivered: 1/19/2010 12:03 PM	Read: 1/20/2010 11:26 AM	I have read the attached document: 1/20/20
Bruce, Brittany	Delivered: 1/19/2010 12:03 PM	Read: 1/19/2010 12:06 PM	I have read the attached document: 1/19/20
Byrd, Jeramie	Delivered: 1/19/2010 12:03 PM		I have read the attached document: 2/1/201
Chaffin, Rozalyn	Delivered: 1/19/2010 12:03 PM	Read: 1/19/2010 1:58 PM	I have read the attached document: 1/19/20
Davidson, Rick	Delivered: 1/19/2010 12:03 PM	Read: 1/25/2010 2:48 PM	I have read the attached document: 1/25/20
Hutson, William	Delivered: 1/19/2010 12:03 PM	Read: 1/20/2010 7:42 AM	I have read the attached document: 1/20/20
Knott, Rhonda	Delivered: 1/19/2010 12:03 PM	Read: 1/19/2010 12:17 PM	I have read the attached document: 1/19/20
Lafferty, Steve	Delivered: 1/19/2010 12:03 PM	Read: 1/19/2010 1:58 PM	I have read the attached document: 1/19/20
Lyon, Patricia	Delivered: 1/19/2010 12:03 PM	Read: 1/19/2010 2:42 PM	I have read the attached document: 1/19/20
Reiss, Charles	Delivered: 1/19/2010 12:03 PM	Read: 1/21/2010 6:49 AM	I have read the attached document: 1/21/20
Rogers, Jana	Delivered: 1/19/2010 12:03 PM	Read: 1/19/2010 12:54 PM	I have read the attached document: 1/19/20
Sandefur, Paul	Delivered: 1/19/2010 12:03 PM	Read: 2/1/2010 9:34 AM	I have read the attached document: 2/1/201
Woodall, Brandon	Delivered: 1/19/2010 12:03 PM	Read: 1/19/2010 12:10 PM	I have read the attached document: 1/19/20

Step 4: Review the listing and see who has not responded and take any action necessary. Hint: You can highlight the entire list, copy it, and paste it into Excel then sort on the appropriate column (for instance Response column which captures the "vote"). It will group all of those who have not "voted" to give you a quick list.

Step 5: It is optional if you wish to save the list in another easily accessible format for submission to the Texas Recognition Program. While on the Tracking tab go to File/Print. This brings up a printer list. You may have Adobe as a printer. This will save the file as a PDF for you instead of printing it.

These are GREAT options for electronic submission to the Texas Recognition Program.