

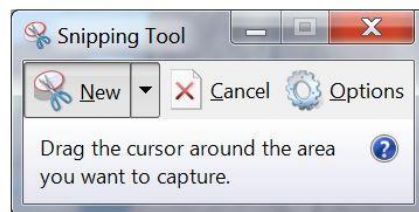
THE TECHIE STUFF

- **SLACK:** Slack a Team communication that takes you away from using email all the time. You can organise different team channels for all staff to get your communication across, open up a private channel for confidential discussions, or just direct message a colleague. You can insert links, documents, photos, anything that is interesting to the reader. It is free, can be set up from your desktop and downloaded to your android or iPhone/iPad. Check it out here <https://slack.com/>
- **Adobe Acrobat Pro** – a tool to collate individual PDF documents into one document which makes life easier for printing and/or sending in an email. Open the first document and click page thumbnails on the left hand side (looks like two pages) and then right click on the last page where you want the next document inserted. Keep going until you've got all PDF files in the one document. Once completed, you can add page numbering, add watermarks and apply redactions. You can delete unwanted pages or replace pages as you go along. Or if you prefer visual instructions check this out ...

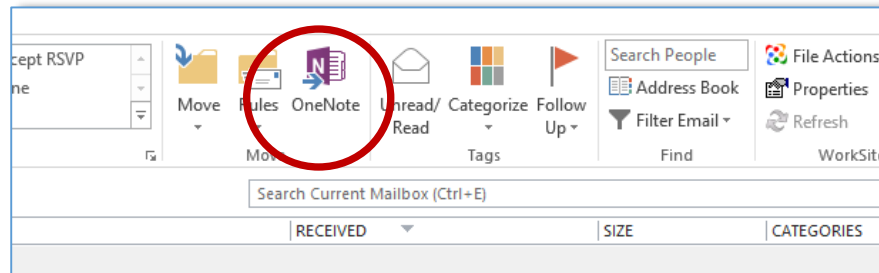


How to compile
lots of separate files

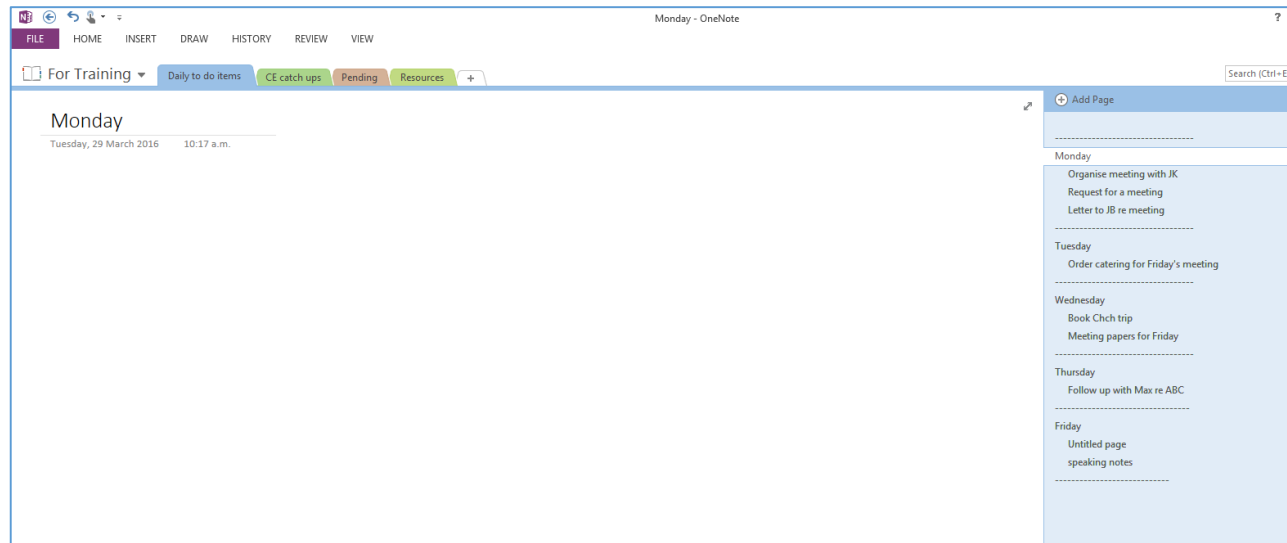
- **Compare documents** – located in Word under 'review' and shows all changes between two documents. These appear in a similar fashion to tracked changes. Simply brilliant when a document returns to you and you are not sure what the changes are, or if you need to highlight changes for discussion. **TIP:** For best results, open the original document first. This is particularly useful if comparing legal documents/policies/board papers etc.
- **The snipping tool.** You'll find it in your pie icon on the bottom left of your screen. You drag it over the item you want to cut/copy and then paste it into your new document/email. Or it gives you options in the drop down arrow to snip the whole page/document.



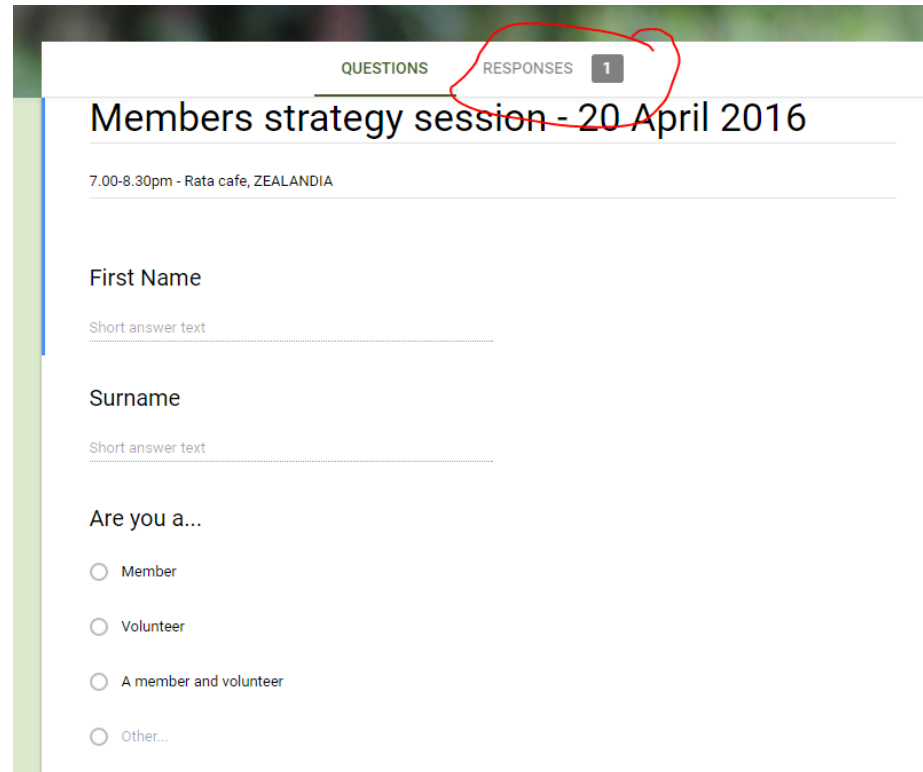
- **OneNote** – Is part of the Windows suite of products (also available online for Mac and Apple users). If your company is still operating in the dark ages and doesn't use either of those – check it out here <https://www.onenote.com>



Use OneNote to organise yourself and your tasks on your computer rather than pieces of paper, notebooks and printing pages of emails. Use it for to do lists, holding meeting information, organising your day to day work and task, event management, tracking communications and saving emails – you can send a copy of an email straight to it and then type in your own notes. There are many tutorials on available on You Tube.



- **Capitalising words on your iPhone.** Tap the caps lock button twice and it will write the whole word in caps. Tap again to revert to lower case.
- **Google forms** – use this to send a link to track RSVPs to events/AGMs – stops so many emails going into your inbox. You need to have a google account and then in the google drive create a new form. The link to the form can be emailed out and responses go directly into the google spreadsheet in the google drive. It saves time and helps to stop the inbox being clogged and reduces error as they put their own information into the form. You can also save any current forms to your web browser and complete the form for anyone who needs help.



QUESTIONS RESPONSES 1

Members strategy session - 20 April 2016

7.00-8.30pm - Rata cafe, ZEALANDIA

First Name

Short answer text

Surname

Short answer text

Are you a...



☐ Member

☐ Volunteer

☐ A member and volunteer

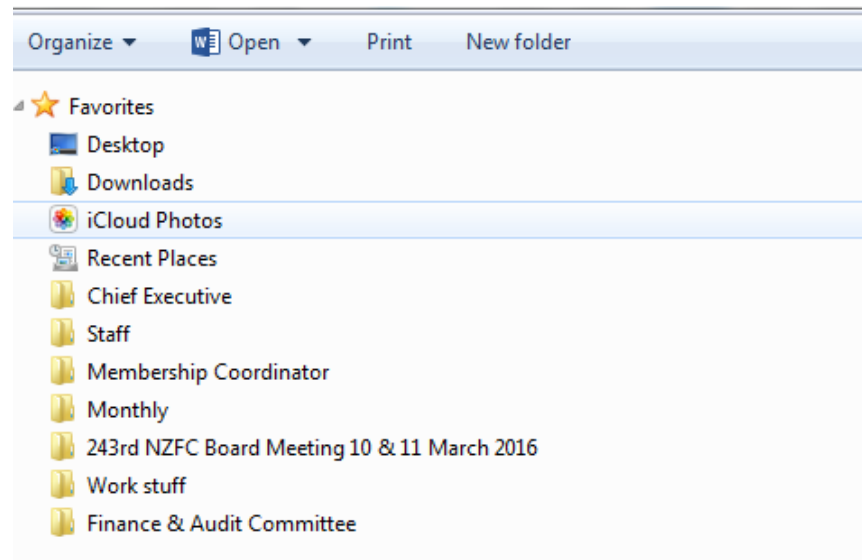
☐ Other...

Here's a snapshot of a google drive with the form and the spreadsheet

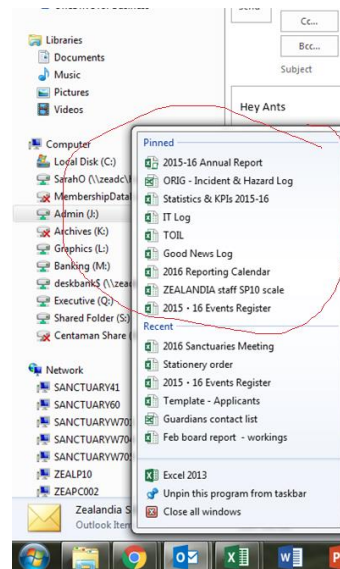
My Drive > Executive Assistant Folder > 2016 April - Member session 2GS ▾		
Name ↑		Owner
 Member 2GS session - April	All responses go into this spreadsheet on the drive	me
 Untitled form	This is the form I made (picture above)	me

A	B	C	D	E	F
Timestamp	First Name	Surname	Are you a...	Any comments...	Attendance
3/21/2016 15:11:11	Sarah	O'Sullivan - test			

- Use the **favourites** button on your internal shared drive/database. It means you don't have to dig down several layers to find a folder. Just drag the folder to the left and release and it will drop it into your favourites section. You can add as many as you like and delete if you no longer need it without it affecting the original folder. It duplicates it so it's still also in the shared space for anyone else to find. It looks like this ...



- Pinning programmes and frequent documents to the task bar <https://technet.microsoft.com/en-us/magazine/dd441705.aspx>



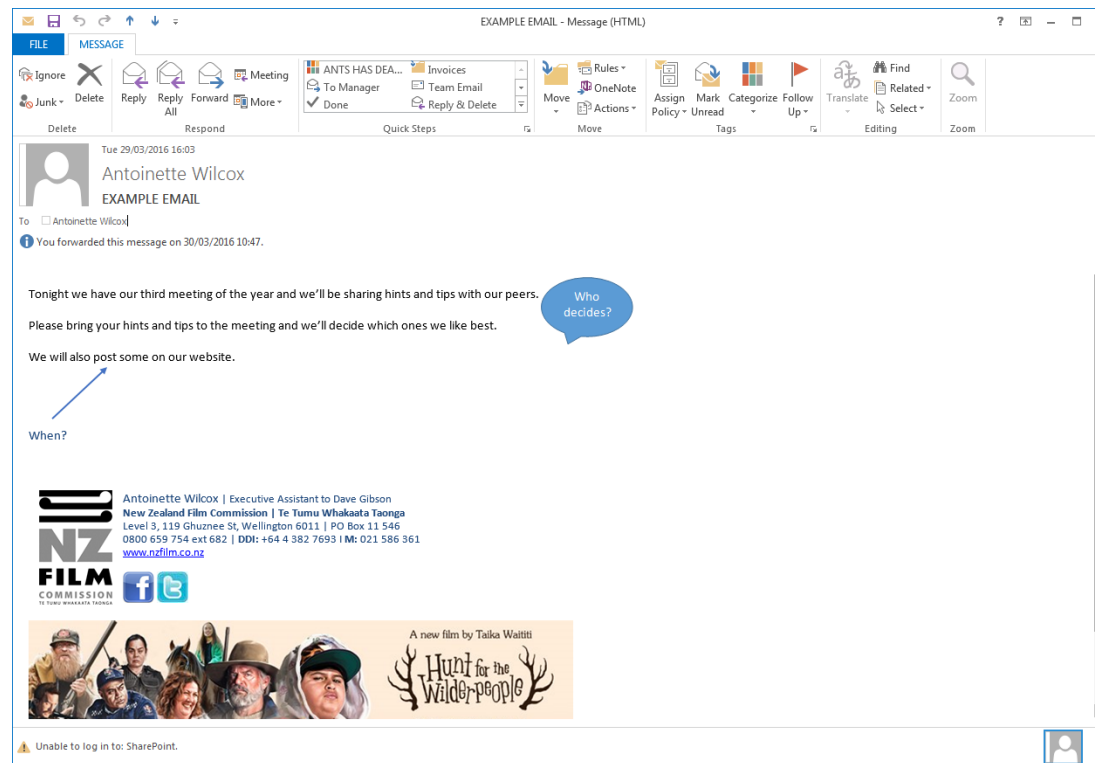
CE SPECIFIC

- **Green time** – blocking time in your CE's diary each day for staff to pop in for quick questions etc. Staff check the time of Green Time for that day and you ensure it's a quick meeting and prioritise. If the time ends up not being required your CE will have an extra 30-60 mins to catch up on emails/phone calls/reading/signing. A win/win situation that keeps everyone happy.
- Organise for all **meeting requests** for your CE to automatically come to you. This will reduce his inbox substantially (but unfortunately will increase yours!).
- **Managing emails** – some EA's have all their CE's emails go to their inbox and then they sort and send the relevant ones to the CE so the CE has a clean slate every day.
- To make your CE more "visible" **schedule meetings in other manager's offices** rather than always holding them in the CE's office.
- Again, to make your CE more visible/approachable to general staff schedule **"walkabout"** sessions once a month so he visits other floors and isn't always seconded in his/her office.
- **Make it fun.** Include your boss in social activities i.e. the Dom Post 5 min quiz. It breaks down barriers and makes them more approachable for staff.

STUFF THAT CAN HELP YOU (THAT'S NOT TECHIE AND MAKES YOU LOOK LIKE A SUPERSTAR)

- **Add photos** of individuals to the calendar if it's the first time your CE is meeting them. If you want to look really flash add in a bio.
- **Agendas.** Add the page numbers to the agenda item. Particularly useful for Board/Committee meetings.
- **Categorising emails.** To help keep on top of emails use the category button to colour code and then you can view them according to category i.e. urgent/action required/Board/for info only/invoices/personal etc.
- **Emails** – add an action at the beginning/end of the subject line e.g. (ACTION: For reading) (ACTION: for you approval)

- **Daily folders** for CE with everything in it, including readings, meeting notes sheets – can even colour code to categories in email like ‘printed and in your daily file’.
- Setting **Outlook** to open into your calendar rather than email. Go to File/Options/Advanced and on the right is an area titled ‘Outlook Start & Stop’ with ‘Start Outlook in this folder’, click Browse and select Calendar.
- **Adding shapes into your emails.** A fab tool for highlighting things in emails that you want to draw attention to. See attached example. Click on the Insert button at the top of your email and then click shapes and choose whichever one you want. You can type inside boxes, drag the shapes to where you want them to sit and change the size and colour. It looks like this.

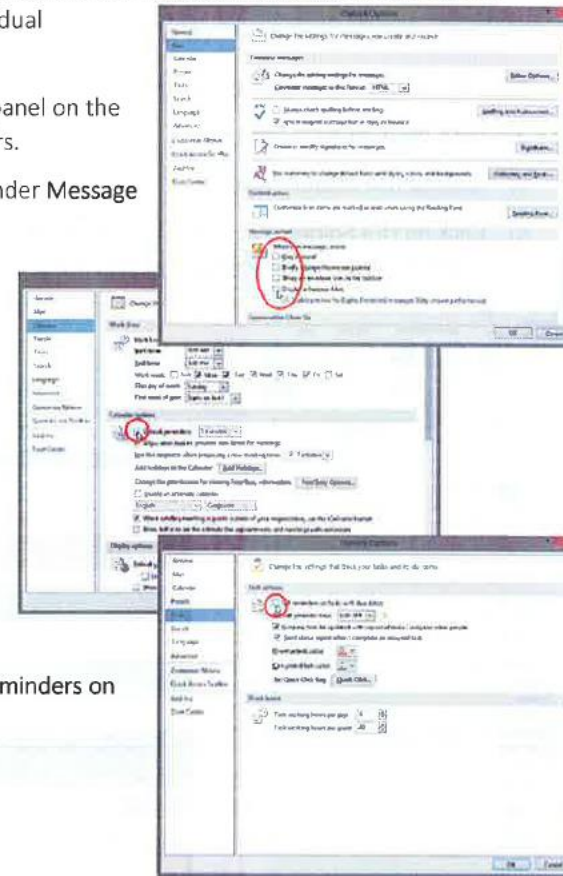


- Turning off the email pop ups from the bottom of the screen – they are a distraction.

3. TURNING OFF DEFAULT REMINDERS AND NOTIFICATIONS (page 2-4)

By default, Outlook sets a reminder for every appointment and task and notifies you each time you receive an email. Often these are unnecessary interruptions and we recommend you turn off these default reminders. You can set a reminder on individual appointments or tasks as needed.

- 1) Click the **File** tab, then click **Options** in the panel on the left. The Outlook Options dialog box appears.
- 2) Click **Mail**, then un-check all four options under **Message arrival**.
- 3) Click **Calendar**, then un-check the **Default reminders** option.
- 4) Click **Tasks**, then un-check the option **Set reminders on tasks with due dates**.
- 5) Click **OK**.



- 20 steps before you leave the office, including: Stop and breathe, unwind (don't take your work home with you). Also include what was great about the day (let go of the negative). Use the 20 steps to start your day. The 20 steps can be whatever you like, e.g. may only take 20 seconds.

HANDY WEBSITES/APPS

www.doodle.com – a free on line tool that which simplifies the process of scheduling events, meetings, appointments with external people. You send options and the participants tick the ones they can do and you can then see the combined results for the best date/ time for everyone.

<https://trello.com> - Trello is the free, flexible, and visual way to organize anything with anyone. Drop the lengthy email threads, out-of-date spreadsheets, no-longer-so-sticky notes, and clunky software for managing your projects. Trello lets you see everything about your project in a single glance.

<http://www.teamlink.co.nz> – recommend as a great course for those who do Minutes.

<http://ped.victoria.ac.nz/courses/318-the-art-of-minute-taking> - another recommended course for Minute takers.

<http://executivesecretary.com> – keep up to date with what’s happening in our profession internationally.

<http://www.timeanddate.com> – time zone converter – great for international meeting planning.

<http://publicholiday.co.nz> – when you’re starting to think you’ll never get another day off!

<http://www.parliament.nz> – very helpful if you work in the public sector.

<http://www.brightstar.co.nz/training/governance-masterclass-eapas> - a Governance Masterclass for EA/PAs.

<http://www.rome2rio.com> – awesome site that compares public transport/taxi options/fares.

<https://www.hopper.com> – you enter your travel requirements and this site/app will tell you when to buy or to hold off because the fare is going to come down.