

Plan your summer getaway...and your return (the Crabby way)

Applies to: Microsoft Office Outlook 2007, Outlook 2003, Outlook 2002

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Crabby Office Lady

When you work for a living, you **MUST** get away from the office once in a while. With a few of my tips and some helpful templates, create a vacation plan, prepare your colleagues for your time away, and then make a smooth return.

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A couple of years ago I wrote a column called [Crabby's get-away-from-it-all checklist](#). Since we recently celebrated Memorial Day, heralding the unofficial beginning of summer, I thought it time to revisit the topic of how to prepare to go on vacation. You do recall the concept of a vacation, when you hang out with your friends and family and try not to dwell on projected sales figures while you're being towed on skis behind a boat going 60 miles an hour, right?

On that note, preparing for time away from work is almost as important as the getting away itself. I want you to be able to concentrate on fun, frolic, and not falling off those skis. And I also want you to come back to work relaxed and refreshed and not freaked out about the loose ends you didn't tie up before you left.

Therefore, this week's column is in three parts. Part I tackles preparing for your vacation, Part II is about preparing yourself and your colleagues for your absence, and Part III offers a couple tips on how to ease back into things after you've returned to the office. Ready? Let's hit the road, Jack (and yes, we have to come back).

Part I: Let's go on vacation

Planning for vacation can be a bit of a job in and of itself. Luckily for you, there is a variety of tools and resources you can use to map out any type of getaway plan, whether it's a big family camping trip or a four-star tour through Europe (where a currency rate calculator could come in mighty handy). Our template designers (and even some of our customers, who submitted templates) have thought of everything...so you don't have to.

General planning and to-do lists

Figuring out what to bring, what to leave behind, and where you're going to be from day to day can be a chore. Keeping these lists separate can make this a bit easier and more useful to you. Here are a few templates to get you started.

- [Trip planning](#)
- [Trip planning to do list](#)
- [Camping trip planner](#)
- [Multi-country tour itinerary](#)
- [Travel checklist for plane trip](#)
- [Currency rate calculator](#)

For the people staying behind

You can't bring everyone with you on the trip (and you certainly wouldn't want to). But it's a good idea to give those staying behind some of your travel information (such as your passport number, emergency contacts, where you'll be when, and things like that). And, if your pet is staying with a friend, a dog-sitter, or even at a kennel, we have a form detailing how to treat him in the manner to which he has become accustomed.

- [Personal data form for trip](#)
- [Pet-care instructions](#)

Photo management

I take a lot of photos — especially while traveling — and it's hard to keep them all organized. The Templates team has come up with three basic ways to organize your photos — before, during, and after you've taken them.

- The before: [Digital camera travel checklist](#)
- The during: [Travel photo log](#)
- The after: [Cruise vacation slide show](#)

NOTE While nothing says "I love you" like agreeing to sit through someone's three-hour slide show of their trip to the Garden of the Gods in Colorado Springs, the least you can do is present your photos using one of our presentation templates.

OK, now that you're ready for your trip, let's tie up some loose ends before heading out the office door.

Part II: Get it together before you leave

Believe it or not, your coworkers' worlds do not revolve around you. Although that may be a startling fact to digest it's true. I'm not saying that they don't have a certain appreciation for the way you gallop down the halls every Friday shouting, "It's Casual Friday! Everyone take off your shoes!" or the fact that you load their arms with your home-grown zucchinis every summer. They just have their own jobs to think about; and if you're on vacation, well, you're just one less lunch crowding the group fridge.

On the other hand, it's not true that your work won't be missed. In fact, if you leave projects hanging and meetings standing while you're not there, you can bet that there will be talk about how much you're "missed" around the office.

A little preparation can go a long way when it comes to making sure that things are nice and wrapped up before you leave.

Vacation request calendars and forms

First, it's good to make sure you can have the time off. And if you're a manager, you can help your employees (and thereby yourself) to do so. We have three different templates designed to help managers (and employees) figure out who's going to be gone when and for how long. Using these templates may just ensure that you won't end up alone in the office for the first two weeks of July, with only your new best friend, the person who delivers that bottled water, keeping you company for five minutes once a week.

- [Absence request form](#)
- [Employee absence tracker](#)
- [Five ways to coordinate your staff's time off](#)

Now that you know who will be gone when, here are a few things you can do to ensure that you won't return to face a mob of angry, red-faced people, milling about your office, wondering where in the heck you are and why this or that didn't get done on time.

- **Set your out-of-office message** Nothing says "I don't care what you need...I'm long gone" more than an e-mail message that doesn't get a reply. When you use Outlook with Exchange Server, there is a handy feature called the Out of Office Assistant. This feature lets you create a reply message for e-mail messages sent to you while you're away. Even if you don't use Microsoft Exchange Server, you can create a rule with a template that does the same thing. It's just a good idea to let people know that you're out of town.

[Demo: Automatically reply to messages while out of the office](#)

NOTE This demo shows you how set up an automated reply for an Exchange Server account as well as a POP3 or IMAP server account. I've said this before and I'll say it again: If you are not using Outlook with Exchange Server, the Out of Office Assistant will not appear on the **Tools** menu in Outlook.

- **Decline standing meetings** It's courteous to decline any pre-arranged meetings so that no one will wonder why you aren't there (if they even notice at all).
[Respond to a meeting request or notification](#)
- **Cancel meetings you hold or ask someone else to run them** If you're the one that has called the meeting (a recurring one or otherwise), send out a cancellation or ask someone else to run the meeting for you. That way you won't be responsible for a conference room full of people milling about wondering what's going on.
[Cancel a meeting](#)
- **Check in files** Just like library books, if you use a program that has a check-out system (such as FrontPage, Microsoft Visual Source Safe, SharePoint), check in your files before you skedaddle. There are many reasons to do this, the least of which is that someone else may need to work on the most current version of a file that is still checked out to you and sitting on your personal computer that no one can access.
[Check a Web page in or out \(source control\)](#)
- **Notify your customers** When you're the customer, getting an out-of-office message from your most important sales rep — just when you need her the most — that says she'll be gone for a month in the Bahamas may force you to consider taking your business elsewhere. And what a nice piece of back-from-vacation news that would be, wouldn't it? Take care of your customers before you leave. Send them a message or call them to let them know that you'll be out of town. And, if you can, delegate some of the responsibilities you have to that customer to a coworker. In fact, you may want to add the name and contact information of your delegate to your out-of-office message, or you may even want to set up a rule so that every e-mail addressed to you from your most important clients is redirected to your delegate. In either case, let your customers know what's going on.
[Create a rule with Out of Office Assistant](#)
- **Do some delegating** Some things you need to keep for yourself, and others can be pawned off — I mean delegated — to someone else. You can reassign Outlook tasks, send e-mail messages with follow-up flags that turn red when the due date comes, or just ask nicely.
[Delegate Access: Let someone else mind your business](#)

And one more tip I have about preparing to leave: If your company is using Exchange Server, you can block off the time that you'll be away so that when people try to schedule you for meetings or wonder why you haven't been around, they'll see that you're out of the office. I also like to send out a broad meeting invitation to the people with whom I work most closely. Such an invitation can list the dates you'll be gone, who your delegates are in the meantime, and any other pertinent information. Be sure to set the appointment **Show time as** field to **Free** (as opposed to **Busy** or **Out of Office**). Remember that this is not for you; it's for your coworkers. When they accept the invitation, it will show up on their calendars as an appointment, but it will show that their time is free. It's just a handy way of reminding them that you're away.

Part III: Return without angst

Going on vacation is great. You're with your family (or maybe with your buddies), you're away from the hustle and bustle of daily life, and perhaps you've even decided to go unplugged: no laptop, no Blackberry, no PDA.

When the time comes to return to the office (and that time *will* come) don't expect to hop back into the swing of things and immediately pick up where you left off. If you do, all that post-trip bliss just may be washed away when you take one glance at your Inbox. My advice is to get your feet wet the first day and then work your way up to full steam ahead as the week progresses.

A couple of tips:

- **Rephrase your out-of-office message** Don't turn your OOF completely off; just change it to say that you're back but you're catching up on things and will get back to that person as soon as it's possible. You're letting your coworkers know that yes, you are back, but it's going to take a bit to get through all the things that have been waiting for you. And most likely, your coworkers (and even your manager) will understand. After all, they go on vacation — and have to return — too.
- **Let your coworkers know you're back** While this seems obvious, life has marched on without you, and people have gotten along fine in your absence. And while this is a good thing for business, it may make you feel a bit left out. So, either send out a broad e-mail (if that's appropriate — I mean you don't need to tell all 500 people in your division that you're back from vacation) or drop by the offices of the folks with whom you work most closely so that they can see your freshly suntanned face. You may want to consider calling an informal meeting — particularly if you're a manager — so that you can catch up on what's been going on.

Fly away...be free

I hope you have a great time, wherever you're going. And remember: Vacation is vacation — it does not mean telecommuting. It's good and healthy to have some time off. Just don't forget to write.

"No man needs a vacation so much as the man who has just had one." — Elbert Hubbard

About the author

[Annik Stahl](#), the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.

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