

Microsoft Outlook 2007

Effective Email Inbox Organization

University of California, Berkeley
Haas School of Business

Presented by



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I. Tools to Manage Current Messages

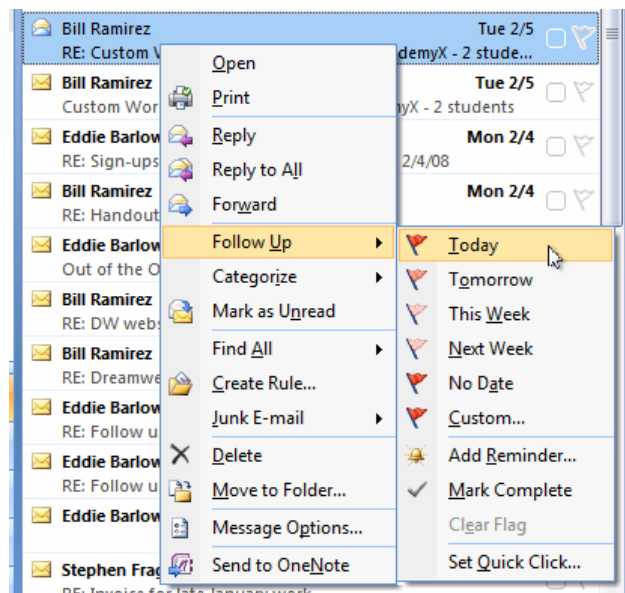
Current messages are email messages in your Inbox that you need to do something about. This may be as simple as reading and filing, or reading and deleting. However, most messages require you to perform an action, whether to reply with information or to perform a task and then reply.

The following features help you keep track of what messages require a follow up, how to keep track of due dates, and how to find follow up messages.

A. Using Flags with Due Dates for Follow Up

If a message requires a follow up action, set a follow up flag on it. This marks the message and places the message in the *To-Do list* under *Tasks*.

1. In your Inbox, right-click the message that you want to flag for a follow up.
2. Select **Follow Up** → (due date for follow-up).



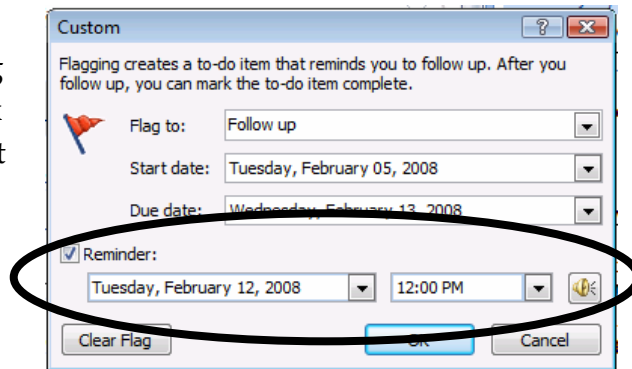
- To select a follow up flag quickly, right-click the flag icon and select your desired flag.



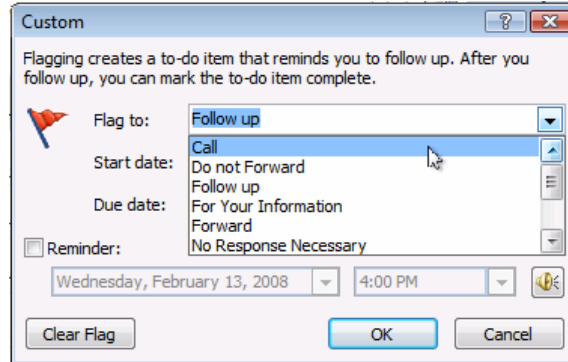
- While viewing the message, click **Follow Up** in the Ribbon and select the Due Date.



- You can set a reminder for the follow up by right-clicking the message and selecting **Follow Up → Add Reminder...** In the Custom dialog box, click the **Reminder** checkbox and select the date and time that you want to be reminded.



- You can specify the type of To-do action by right-clicking the message and selecting **Follow Up → Custom**. In the Custom dialog box, use the **Flag to:** drop-down to select a type of To-do action.

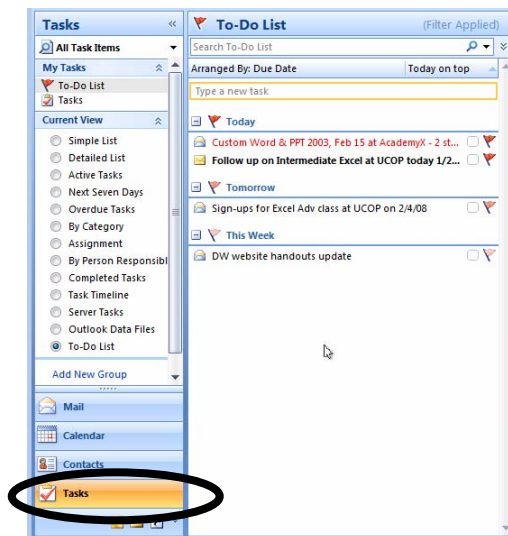


- When you have followed up with the message, mark it as complete by right-clicking the message and selecting **Follow Up → Mark Complete**. Or, click the flag icon in the message list to change it to a check mark.

B. Managing Flagged Messages in Tasks

All email messages which have been flagged for follow-up are listed in the To-Do list under *Tasks*.

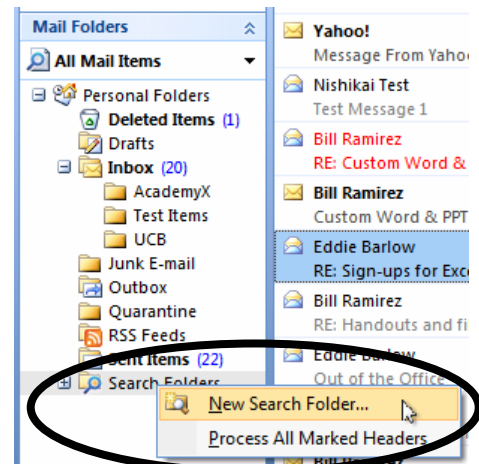
You can reply to, delete, or mark as complete directly from the To-Do list by right-clicking the message and selecting the appropriate command.



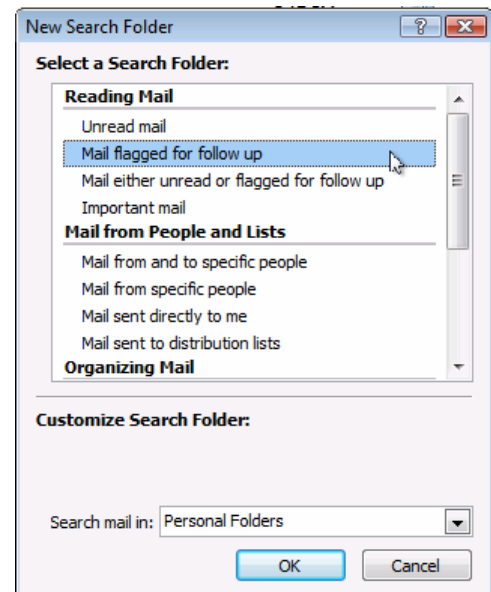
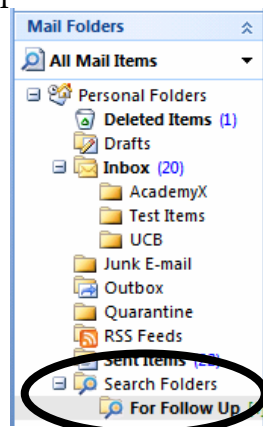
C. Creating a Follow Up Search Folder

The Search Folders let you create separate lists of messages that meet certain criteria.

1. Go to your Mail area in the left navigation list.
2. In the Mail Folders list, right-click **Search Folders** and select **New Search Folder...**



3. In the New Search Folder dialog box, select **Mail flagged for follow up**. Click **OK**.
4. Click the **For Follow Up** folder under **Search Folders** to view a list of all messages flagged for follow-up.

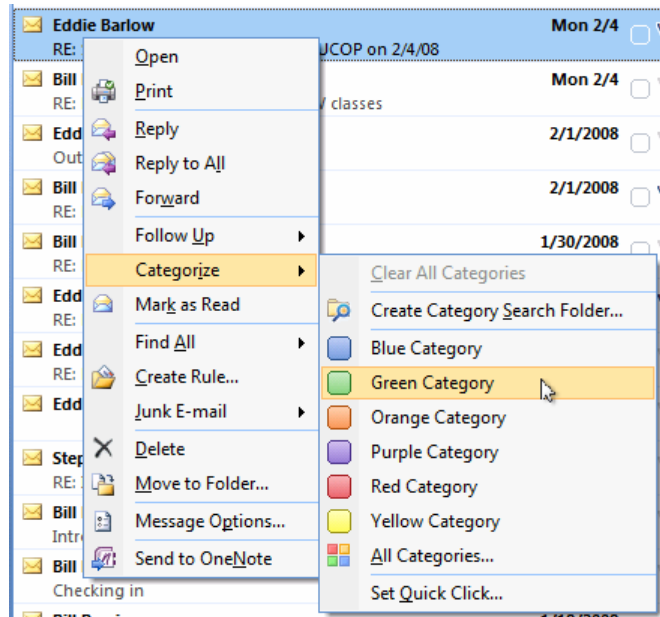


- You can create other Search Folders in the New Search Folder dialog box, such as for **Unread mail** or **Mail to and from specific people**. These are all filtered lists which display only the messages which meet those requirements.
- To remove a Search Folder, right-click the folder name and select **Delete** “(name of search folder)”.

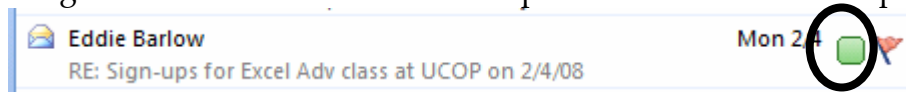
D. Using Colors to Categorize

You can also categorize messages with colors and category names.

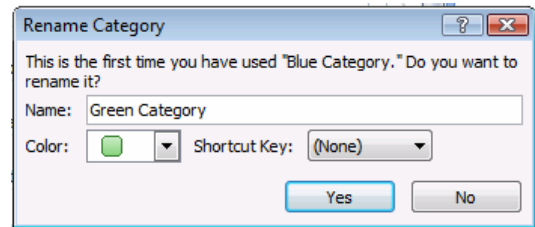
1. In your Inbox, right-click the message that you want to color.
2. Select **Categorize** → (color category).



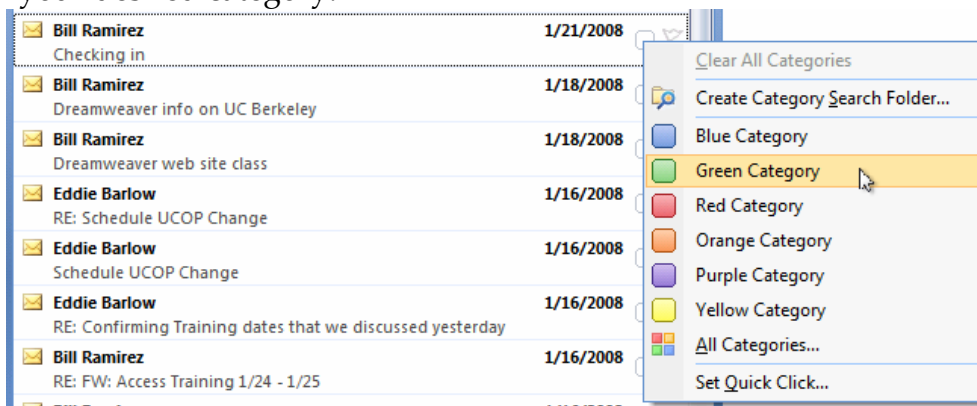
3. The message will be marked with a color square next to the follow-up flag.



- If this is the first time you are using this category color, a dialog box will open asking if you want to rename the category. Enter a name if desired, and click **Yes**. Or, click **No** to keep the original name.



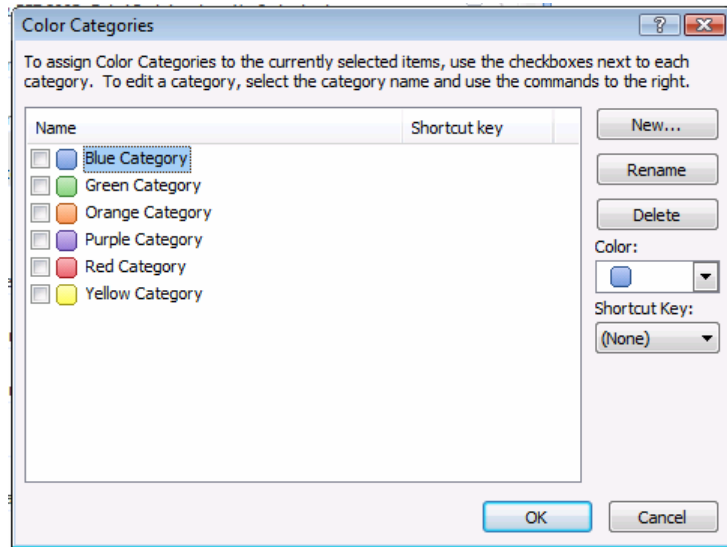
- To select a category quickly, right-click the color square icon and select your desired category.



- While viewing the message, click **Categorize** in the Ribbon and select a category color.



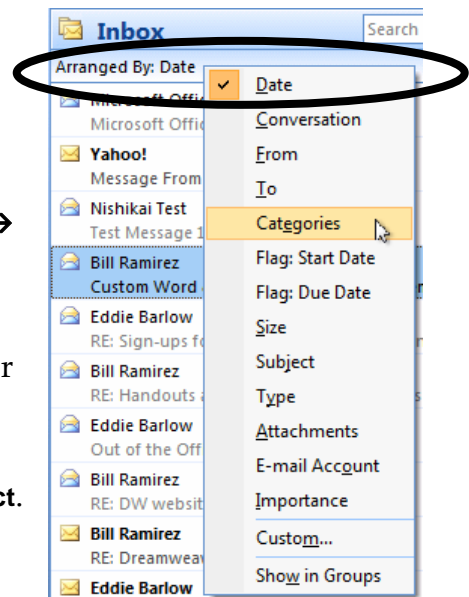
- To remove a category color, right-click the message and select **Categorize → Clear All Categories**. Or, click the color square in the message list.
- To rename, delete, or create new color categories, right-click any message and select **Categorize → All Categories...** Click **New** to create a new category. Select the category and click **Rename** to rename it. Select the category and click **Delete** to delete it.



E. Viewing By Category

Once messages have been categorized, you can sort messages according to that categorization.

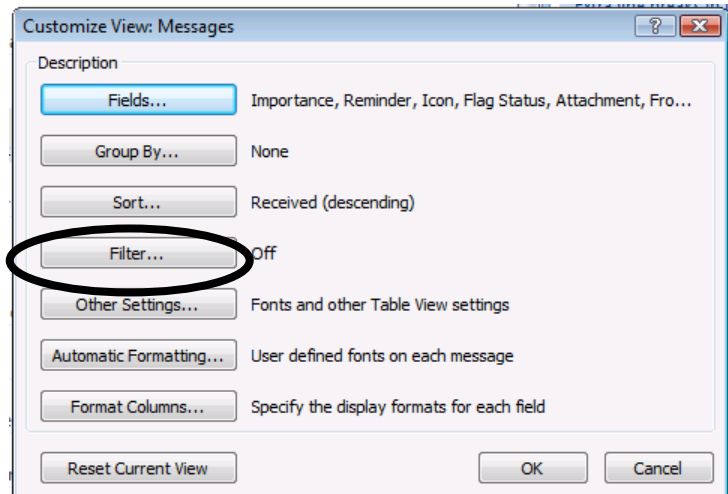
1. Right-click the Arrange By bar.
 - If you do not see the Arrange By bar, go to **View → Arrange By**.
2. Select **Categories**.
 - To show in groups, right-click the Arrange By bar and select **Show in Groups**.
 - You can select other arrangements using the Arrange By bar, such as sorting by **From** or **Subject**.



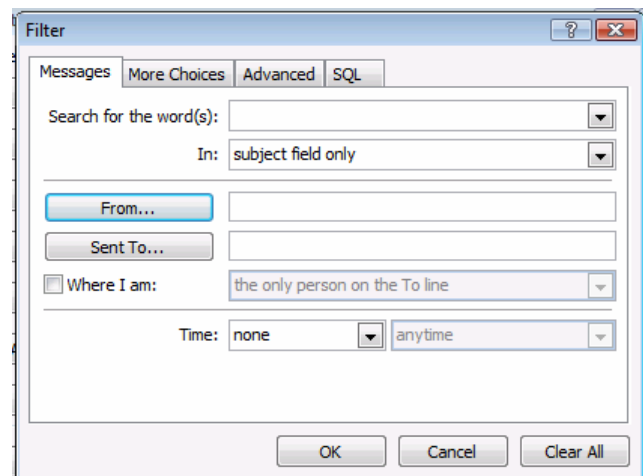
F. Adding View Filters

View Filters let you filter your current view, such as your Inbox or Sent Items folder, so that you only see a subset of messages. This is helpful for temporarily focusing on that subset of messages.

1. Go to **View → Arrange By → Custom**.
 - Or, right-click the Arrange By bar and select **Custom**.
 - Or, go to **View → Current View → Customize Current View**.
2. In the Customize View dialog box, click **Filter...**



3. In the Filter dialog box, enter the criteria for the filter. For example, search for the words "ABC Project" to view only the messages which contain those words.



4. Click **OK**.
 - To remove the filter, go back to the Filter dialog box and click **Clear All**.

G. Managing Current Views

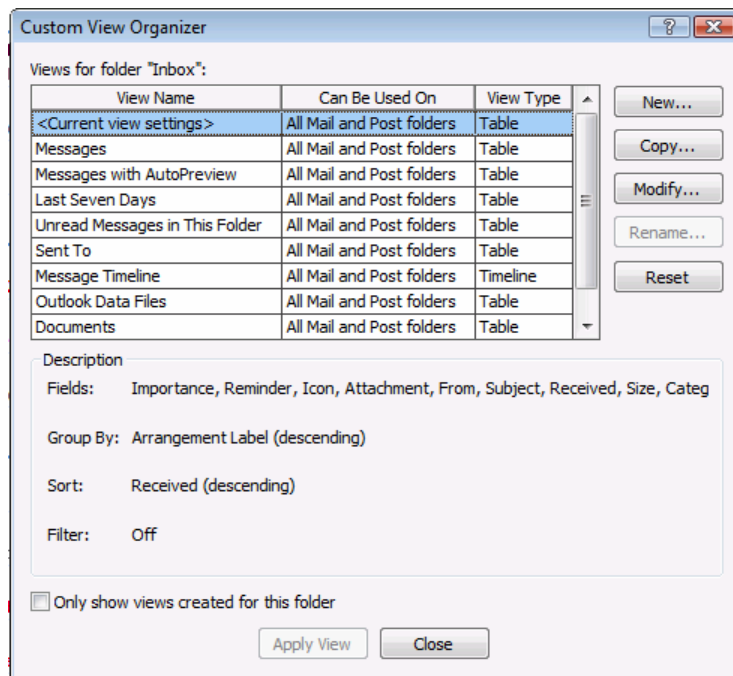
If you want to use a certain view often, such as a filtered view, you can save that view in the *Current Views* list.

Outlook contains a list of predefined Current Views. Go to **View → Current View →** (select a view). Or, turn on the Advanced toolbar and select a view from the **Current View** drop-down.

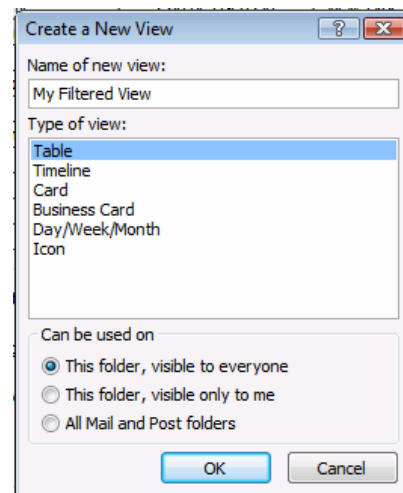


To create your own custom view:

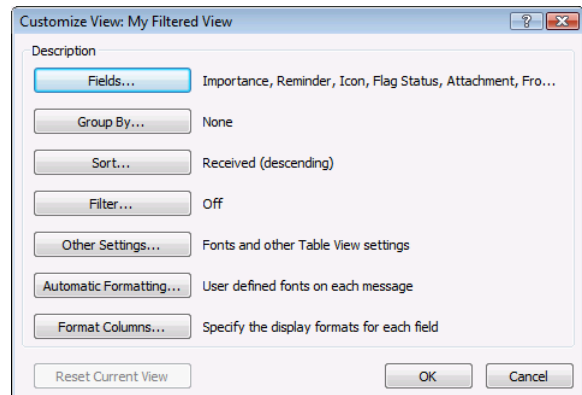
1. Go to **View → Current Views → Define Views...**
 - Or, select **Define Views...** from the Current View drop-down in the Advanced toolbar.
2. In the Custom View Organizer, click **New...**



3. In the Create a New View dialog box, enter the name of the new view. Select a type of view, and where this view can be used. Click **OK**.



4. In the Customize View dialog box, set the options for your view. For example, click **Filter...** and set a filter criteria. Then, click **OK**.
5. Click **Close** to exit the Custom View Organizer.



H. Dragging Emails to Calendar/Tasks/Contacts

If you want to add information from a message to a new appointment, task, or contact, simply drag the message from the Inbox list to **Calendar**, **Tasks**, or **Contacts** in the left navigation.

- When you drag a message to Calendar, a new appointment window appears with the Subject and text of the message. Select your appointment date and time, and click **Save**.

- When you drag a message to Tasks, a new To-Do window appears with the Subject and text of the message. Select your To-Do options and click **Save**.

- When you drag a message to Contacts, a new Contact window appears with the Name and E-mail address of the sender. Enter any additional data and click **Save**.

II. Tools to Manage New Messages

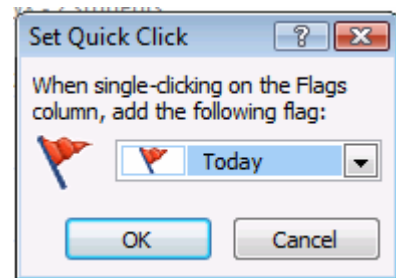
There are several tools that will let you manage *new, incoming messages* more efficiently.

The following features help you flag and categorize messages quickly as well as create rules to automate actions as messages arrive.

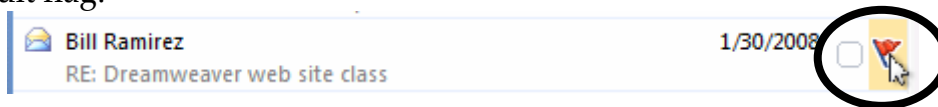
A. Setting Quick Click for Follow Up

The *Quick Click for Follow Up* setting lets you select a default Due By date.

1. Right-click on any message and select **Follow Up** → **Set Quick Click...**
2. In the Set Quick Click dialog box, select the Due By flag that you want to be the default choice. Click **OK**.



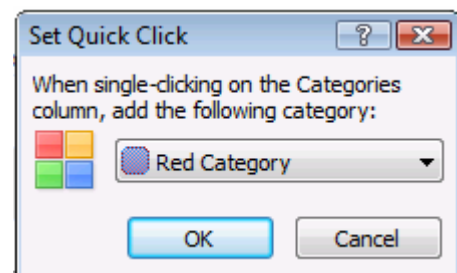
3. To use the Quick Click, click the flag icon in an unflagged message to set the default flag.



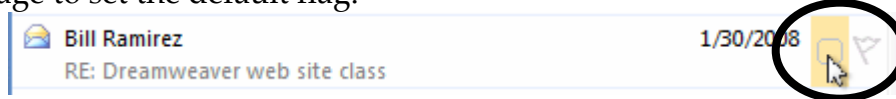
B. Setting Quick Click for Categorize

The *Quick Click for Categorize* setting lets you select a default category.

1. Right-click on any message and select **Categorize** → **Set Quick Click...**
2. In the Set Quick Click dialog box, select the category that you want to be the default choice. Click **OK**.



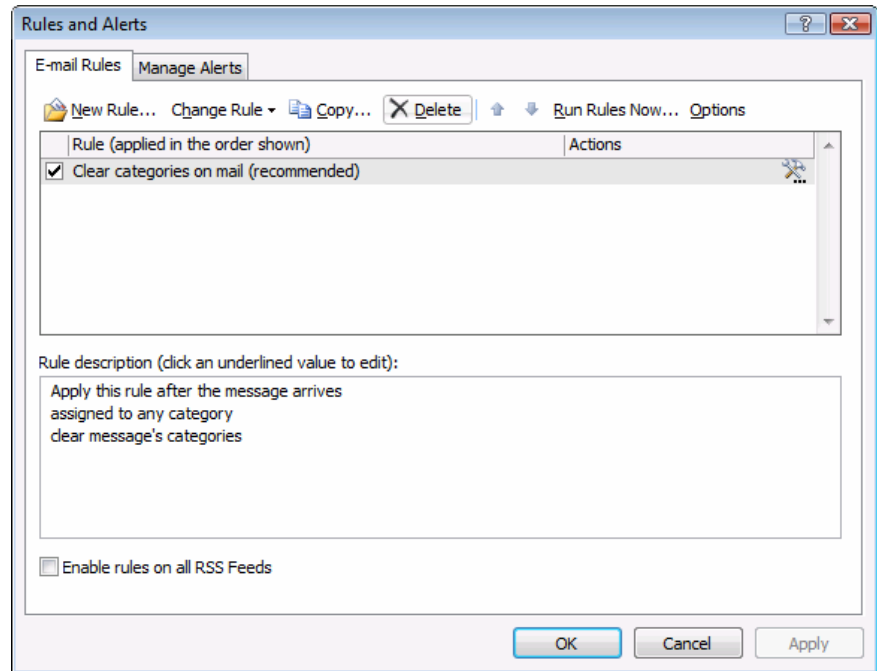
3. To use the Quick Click, click the color square icon in an uncategorized message to set the default flag.



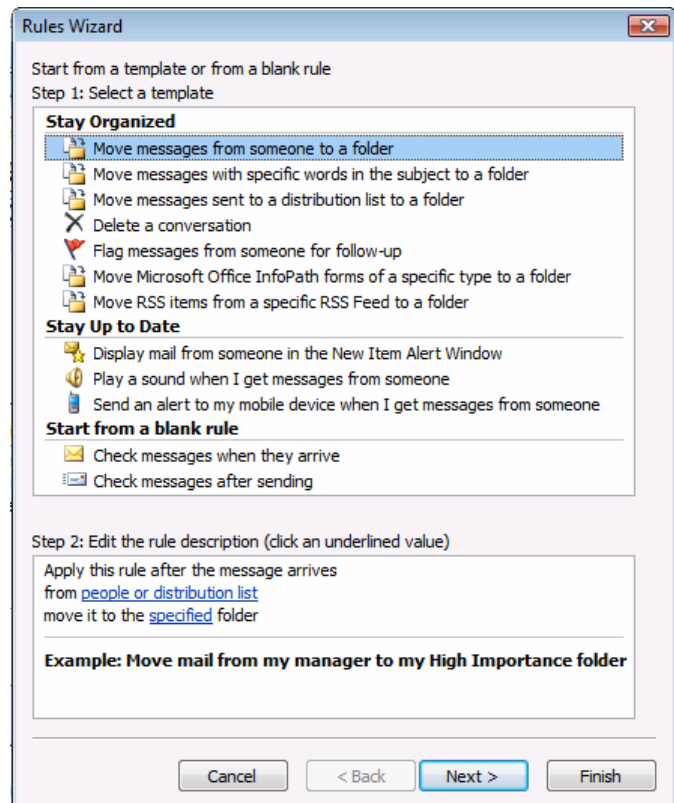
C. Creating a Rule from Scratch

Rules let you automate actions, such as moving a message from a specific person into a specific folder.

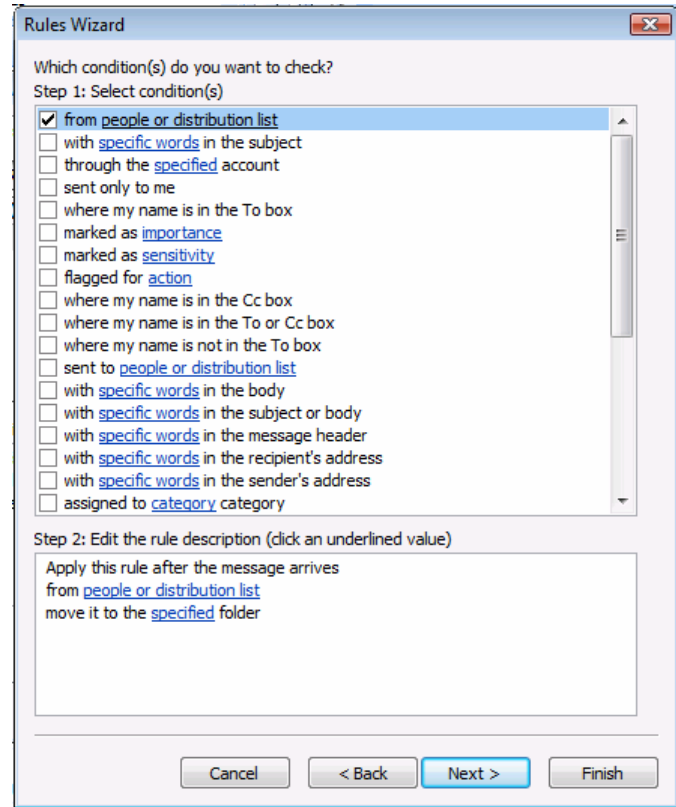
1. While viewing your Mail, go to **Tools → Rules and Alerts**.
2. In the Rules and Alerts dialog box, click **New Rule...**



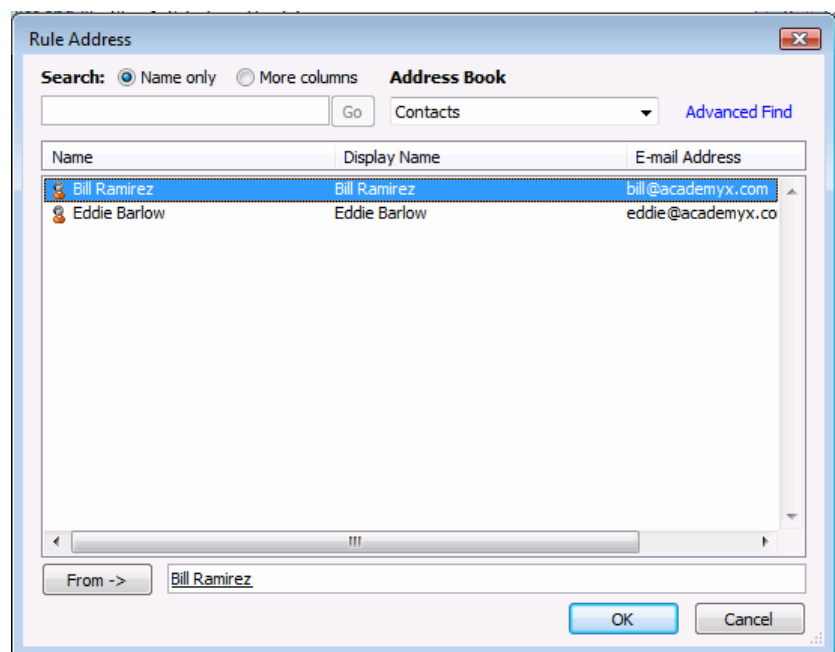
3. In the Rules Wizard dialog box for “**Starting from a template or from a blank rule**”, select the type of action that you want to perform. Click **Next**.



4. In Step 1 of the Rules Wizard dialog box for “Which conditions do you want to check?”, select the types of conditions that you want to meet.

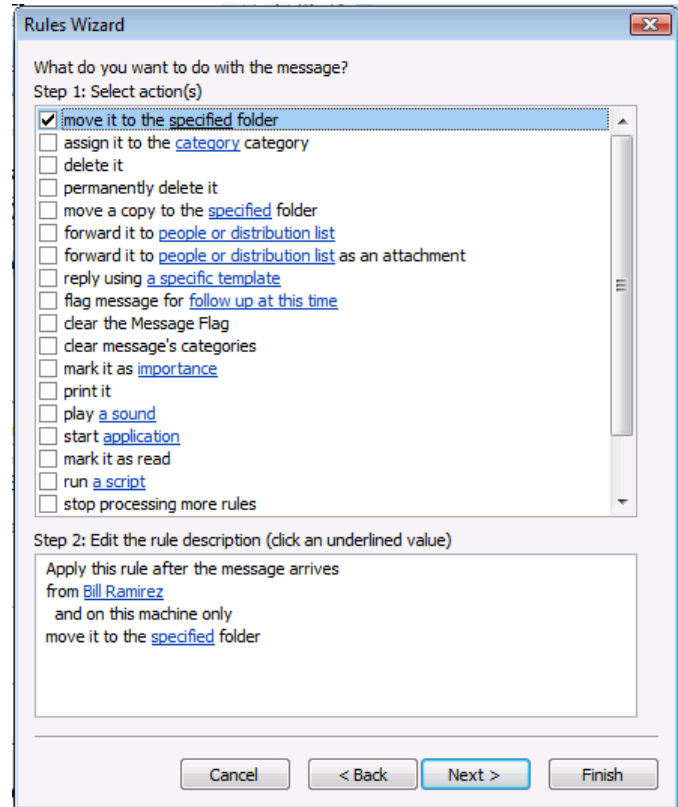


5. In Step 2, click the type of condition to specify the exact conditions. For example, if you clicked “people or distribution list”, the Rule Address dialog box will appear. Double-click the name of the person or distribution list so that it appears in the From field, then click **OK**.

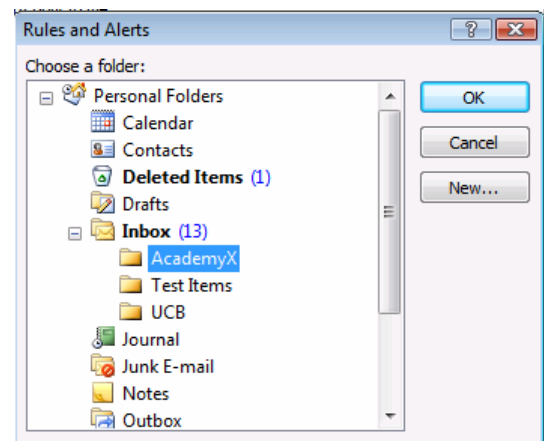


6. In the Rules Wizard dialog box, click **Next**.

7. In Step 1 of the Rules Wizard dialog box for “**What do you want to do with the message?**”, select the actions that you want to have performed.

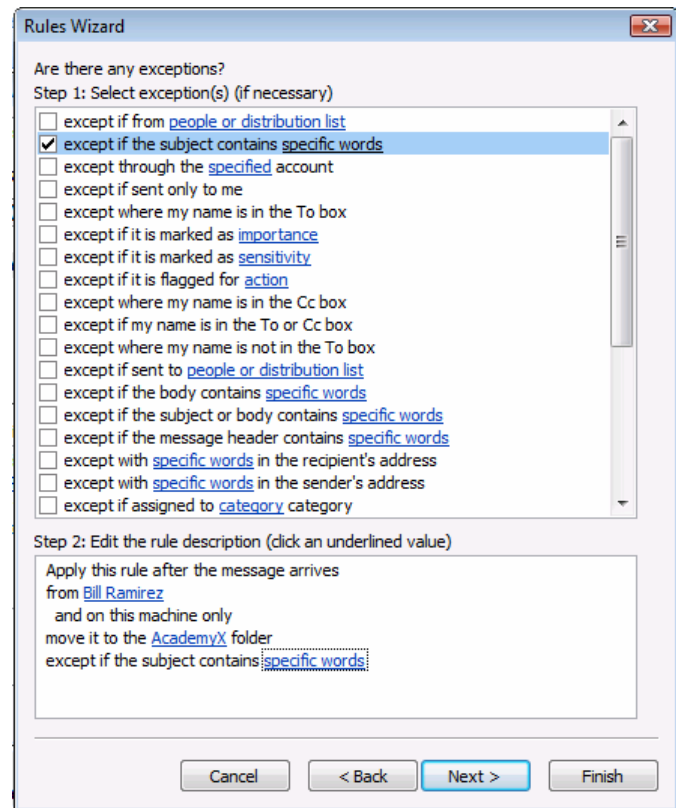


8. In Step 2, click the type of action to specify the exact action. For example, if you clicked “**specified folder**”, the Rules and Alerts dialog box will appear. Select the folder that you want to move these message to, then click **OK**.

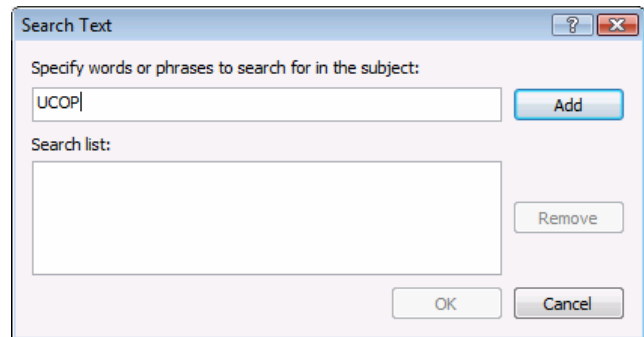


9. In the Rules Wizard dialog box, click **Next**.

10. In Step 1 of the Rules Wizard dialog box for “**Are there any exceptions?**”, select any exceptions.



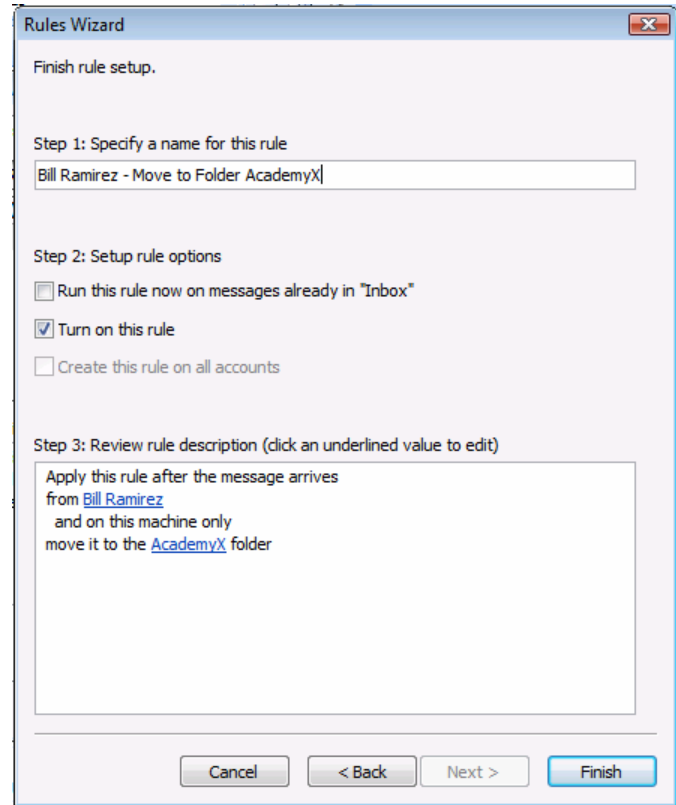
11. In Step 2, click the exception. For example, if you clicked “**specific words**”, the Search Text dialog box will appear. Enter the words to search for in the subject, then click **OK**.



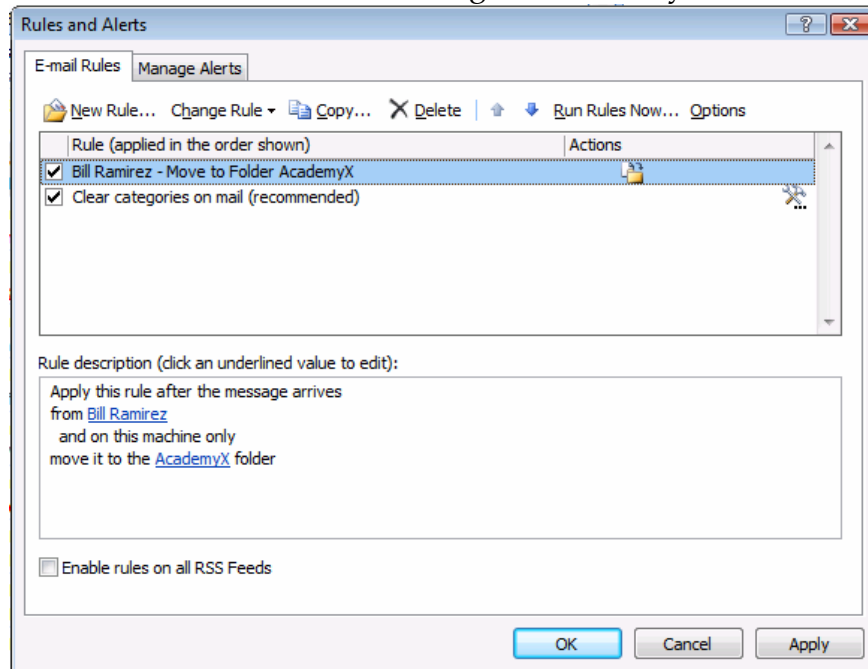
12. In the Rules Wizard dialog box, click **Next**.

13. In Step 1 of the Rules Wizard dialog box for “**Finish rule setup**”, enter a name for your rule.

14. In Step 2, make sure **Turn on this rule** is checked.



15. Click **Finish**. The Rules and Alerts dialog box will list your new rule.



16. Click **OK**.

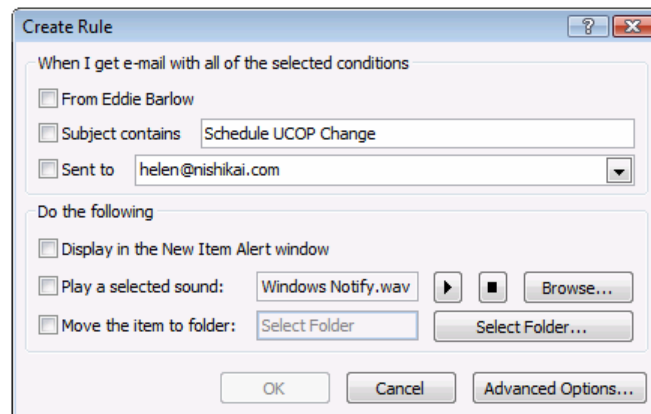
D. Creating a Rule from a Message

If you want to create a rule that will apply to messages with a particular sender and/or subject and you have an example message, you can create the rule directly from the message.

1. View the message. In the Ribbon, click **Create Rule**.



2. In the Create Rule dialog box, click the criteria and action that you want to have performed.
3. Click **OK**.



E. Managing Rules

- If you have several rules that might apply to one message, the rules will be applied in the order they appear in the Rules and Alerts dialog box. For example, if you have one rule to move a message marked Important to an “Important Messages” folder and another rule to move a message from Bill Ramirez to an “AcademyX” folder, a message from Bill marked as Important will meet the criteria for both rules. The rule listed first in the list will determine to which folder this message is moved.
- To edit a rule, go to **Tools → Rules and Alerts**. Select the rule and click **Change Rule → Edit Rule Settings**.
- To rename a rule, go to **Tools → Rules and Alerts**. Select the rule and click **Change Rule → Rename Rule**.
- To delete a rule, go to **Tools → Rules and Alerts**. Select the rule and click **Delete**.

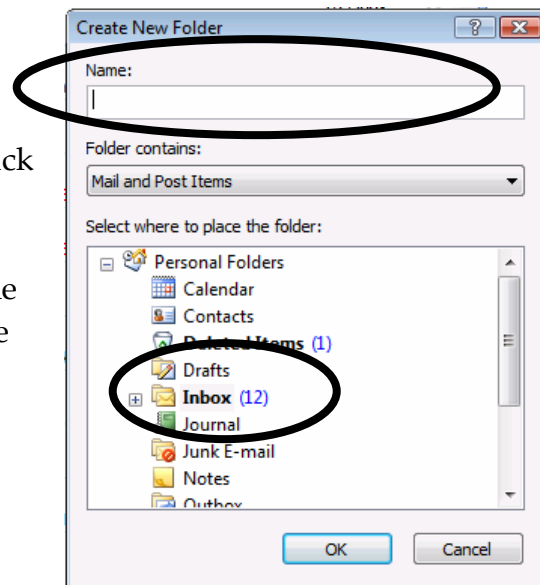
III. Tools to File Completed Messages

Once you have handled a message, you can delete it or file it. There are several tools that help you file and archive messages efficiently.

A. Creating Custom Folders

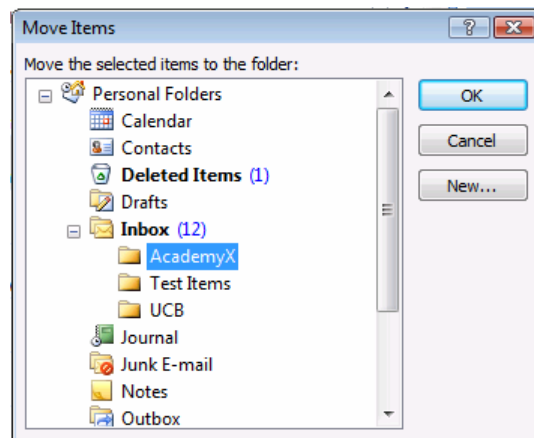
Custom folders let you organize messages into folders that you create. You can create subfolders within top-level folders.

1. Right-click the Inbox in the left navigation, and select **New Folder...**
2. In the Create New Folder dialog box, enter the name of the new folder and click **OK**.
 - To create a subfolder within an existing folder, select the folder in the Create New Folder dialog box before clicking **OK**.



B. Moving a Message to a Folder

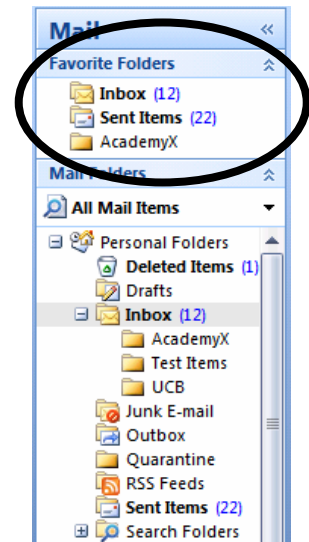
1. Drag the message from the Inbox to the folder in the left navigation.
 - Or, right-click a message and select **Move to Folder...** In the Move Items dialog box, select the folder and click **OK**.
 - Or, while viewing a message, click the **Move to Folder** drop-down in the Ribbon, and select a folder. Only top level folders are listed here. For a subfolder, select **Other Folder** from the drop-down.



C. Managing Favorite Folders

If there is a folder that you need to access quickly, set it as a *Favorite Folder*. These folders appear in the Favorite Folders area above Mail Folders in the left navigation.

- To add a folder, right-click the folder name under Mail Folders and select **Add to Favorite Folders**.
- To remove a folder, right-click the folder name under Favorite Folders and select **Remove from Favorite Folders**.

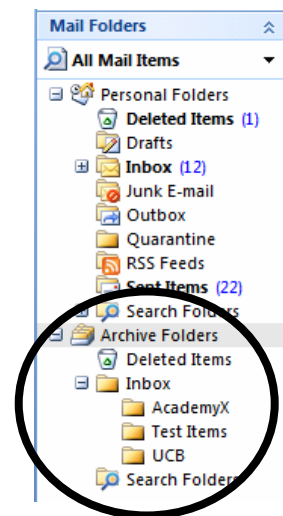


D. Using AutoArchive

In a corporate setting, e-mail messages and other items in your Outlook account are actually kept on a *Microsoft Exchange Server*. Because this data is stored in a central location, you can check your account from any computer using an internet browser.

However, you may be asked to archive old data periodically to save memory space on the Exchange Server. This data will be downloaded to the Outlook program on your primary computer and will only be accessible from that primary computer.

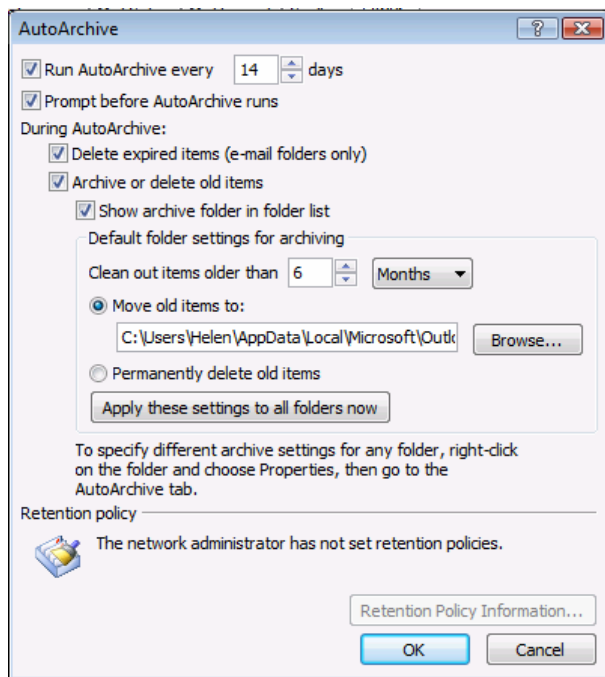
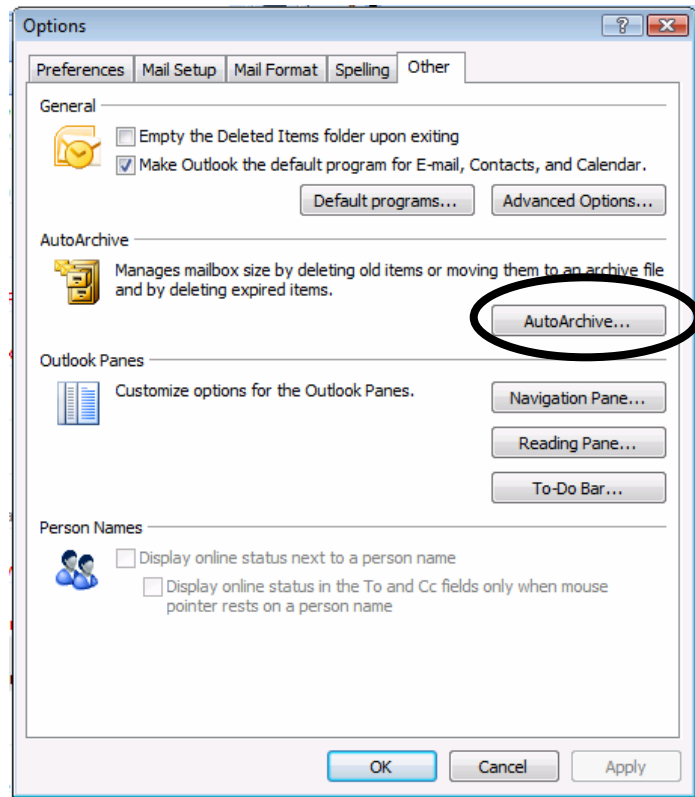
After items have been archived, you can view them in the Archive Folder list in the left navigation.



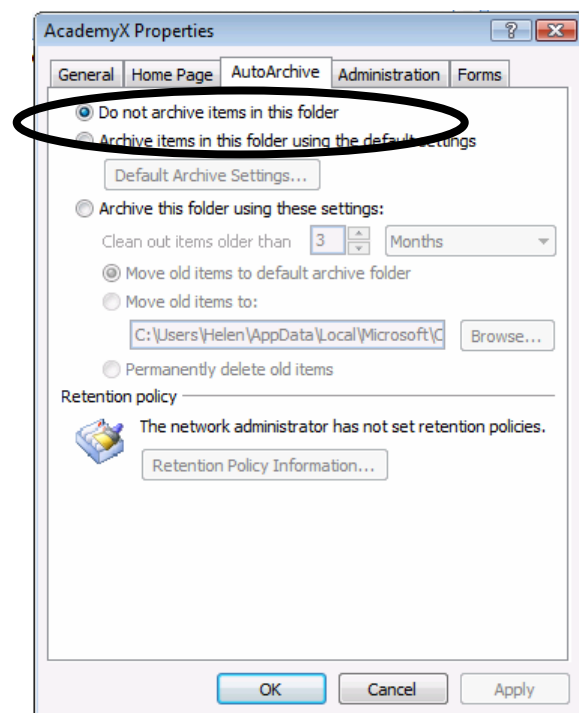
Outlook will automatically archive old items using AutoArchive unless you change the settings. Inbox, Calendar, Tasks, Notes, Journal, and Drafts items will be archived after 6 months; Sent Items, Deleted Items after 2 months; and Outbox after 3 months.

To change AutoArchive settings:

1. Go to **Tools** → **Options**.
2. In the Other tab, click **AutoArchive...**
3. In the AutoArchive dialog box, select any new settings. Click **OK**.



- To prevent AutoArchive from archiving a specific folder, right-click the folder in the left navigation and select **Properties**. In the Properties dialog box, select the **AutoArchive** tab. Make sure **Do not archive items in this folder** is selected, then click **OK**.



E. Using Manual Archiving

You can manually archive items instead of using AutoArchive.

1. Go to **File** → **Archive...**
2. In the Archive dialog box, select the top-level folder that you want to archive. Set a date and archive file as necessary. Click **OK**.

