

# WHY I WROTE THIS GUIDE

Look at the number of emails in your inbox. How many of them are unread? If you are like most people, the number is probably at least somewhere in the hundreds, possibly more. Now ask yourself how often you have forgotten to respond to someone's request for information because it gets buried. Or, how often have you sent a request to a coworker or customer and never heard back, then forgot to follow-up with them and the ball was dropped. Lastly, how much time do you spend each week searching for emails or attachments in those emails? No doubt it is significant!

Not everyone has time to read a 300-page book on how the best use of a software application. Because of this, I wrote this guide to quickly enable the set up and use of Outlook to most effectively organize the daily deluge of emails that are sent and received. This guide will show you the simple, yet extremely effective methods that I have developed over the last 15 years to ensure you are using this tool to its fullest potential. Other guides contain hundreds of pages, and cover every detail of the software, taking hours to read. In contrast, this guide attempts to succinctly cover the simplest, yet most effective customizations. After all, this is about efficiency!

As technology becomes more pervasive in the workplace, efficiency improves only if we learn to embrace it. So often I see people using tools so ineffectively that little is gained from them. For many companies, Microsoft Outlook continues to be a staple of workplace technology, however after 15 years in my professional career I have rarely seen it used to its full potential. This handbook is intended for those who heavily rely on Outlook yet have not taken the time to learn how it can greatly improve your productivity, making you more efficient and more accountable to yourself and those around you. I believe the phrase, "the whole is greater than the

sum of its parts” applies to this handbook. Implementing and perfecting each topic discussed will greatly increase your efficiency, specifically if you fully employ each one. I hope you enjoy it!

The references and images included in this handbook are referencing Outlook 365 versions 2002 to 2010 on a Windows Operating System, so if you are using a different version some references may differ slightly, specifically on Mac OS. However, the principles in this guide have been applicable for over 15 years, so I presume they will not drastically change in the future. That said, I will continue to revise this handbook as necessary to stay current.

# CONTENTS

WHY I WROTE THIS GUIDE.....	v
GOALS OF THIS GUIDE .....	9
SECTION 1: SETTING UP AND ORGANIZING QUICKLY.....	11
SECTION 2: TRACKING OPEN ACTIONS USING OUTLOOK FLAGS .....	21
Section 2A – Setting up flags .....	22
Section 2B – Utilizing Flags within Task View .....	24
SECTION 3: FILING SENT AND RECEIVED EMAILS .....	27
SECTION 4: CREATING FAVORITE FOLDERS .....	29
SECTION 5: AUTOMATIC FORMATTING OF RECEIVED EMAILS .....	31
SECTION 6: CUSTOMIZATION AND SHORTCUTS.....	35
Section 6A – Customizing Categories .....	35
Section 6B – Adding Macros to simplify the process .....	36
Macro 1 – Save Sent Item.....	40
Macro 2 – Show Categories Button.....	42
Section 6C - Assigning keyboard/mouse shortcuts .....	44
SECTION 7: MANAGING INCOMING EMAILS AND USING POSTS .....	51
Section 7A – Incoming Emails.....	51

Section 7B – Outlook Posts.....	52
SECTION 8: VIEWING EMAILS IN CONVERSATION VIEW .....	55
SECTION 9: MANAGING OUTGOING EMAILS.....	57
SECTION 10: CUSTOMIZING TASK VIEW AS A DASHBOARD .....	59
SECTION 11: USING OUTLOOK’S SEARCH FUNCTIONS .....	67
SECTION 12: THE HOLY GRAIL, “INBOX ZERO” .....	77
KEYBOARD SHORTCUTS .....	79
TABLE OF FIGURES.....	81

# GOALS OF THIS GUIDE

Throughout this guide, you will learn the following topics:

- Quickly organize an existing mailbox Section 1
- Effectively track all open actions for both sent and received emails by flagging, categorizing, and filing items quickly and effectively Sections 2, 3, & 9
- Organize your folder structure, mail view, and create dynamic search folders Sections 1, 3, 8, & 11
- Automatically format incoming emails based on senders and content Section 5
- Create macros to simplify the process of flagging, categorizing, and filing emails for follow-up Section 6
- Modify Task View to show actionable items in an organized way Section 10
- Use keyboard shortcuts and/or set up mouse shortcuts to increase efficiency Section 6
- Create Outlook Posts to capture tasks not contained in emails Section 7
- Effectively using the Outlook search function to easily find emails Section 11
- Get in the habit of easily ending each day with all actions tracked and no emails in your inbox Section 12



# SECTION 1: SETTING UP AND ORGANIZING QUICKLY

If you are like many people, you have probably already been using Outlook for years. Because of this, you likely have countless emails in your inbox, many of these being unattended to. You also may have overdue emails you have flagged from that time you decided to try using them, but eventually gave up. Maybe your emails are spread across a collection of folders that are generally useful, but still not how you would like them. The purpose of this section is to help you quickly parse these emails without losing the important items, as well as setting up your layout such that it will be most productive as we move through the following sections.

The first step in reducing the bulk of emails you have is to filter out those that are likely unimportant. This may sound simple at first but sifting through thousands of emails to end up with something that is easily reviewed and acted upon can quickly become very time consuming, which is why you have not done it yet. As a first step, it is mostly likely that emails you are copied on, and not a direct recipient of, are the best candidates to be archived. To easily narrow in on these, we will create a rule to move all the emails that meet these criteria to a separate folder. We can then optionally apply some additional rules to further narrow in on emails to archive.

Under the Home tab of the ribbon, click on “Rules” and then “Manage Rules & Alerts.” See Figure 1. Ensure that your mailbox is selected in, “Apply changes to this folder:” and then click “New Rule.” Below the “Start from a blank rule” section, select “Apply rule on messages I receive,” see Figure 2. Click “Next” to display the “Rules Wizard.

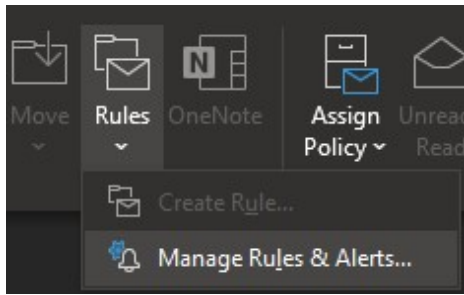


Figure 1. Creating a rule

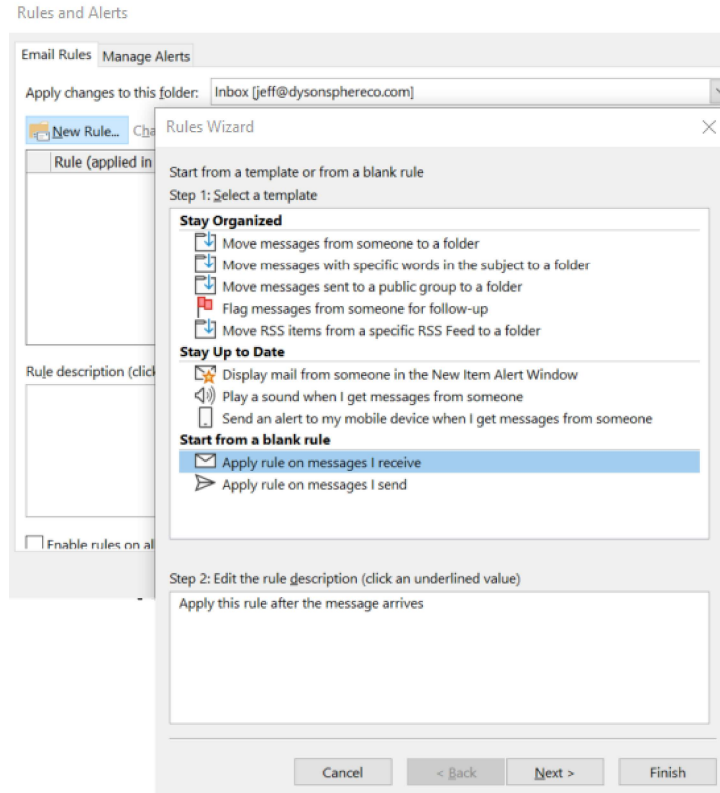


Figure 2. Creating a rule for received emails

Next, select “where my name is in the Cc box” as well as the “where my name is not in the To box” and click “Next.” The next option is to choose what to do with emails that meet the criteria. In this case, we will choose to move these emails to a separate folder, so choose “move it to a specified folder.” See Figure 3 and Figure 4 below.



## Customizing Microsoft Outlook for Efficiency

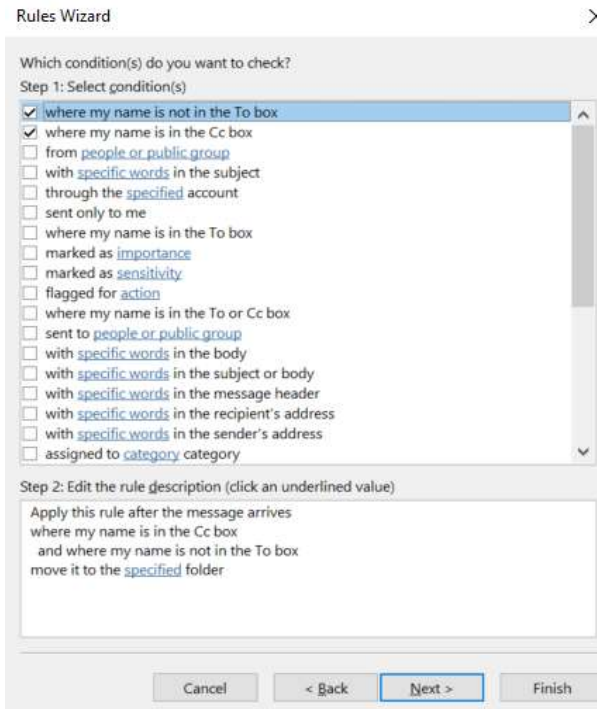


Figure 3. Choosing rule conditions

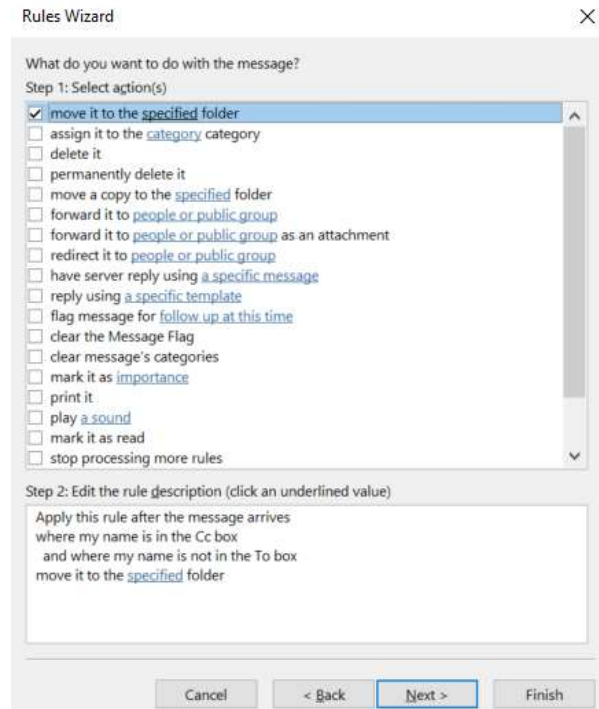


Figure 4. Choosing what to do with emails that meet the selected conditions

After choosing, “move it to a specified folder,” you need to ensure that you choose a folder by clicking the blue underlined “specified” text shown in the bottom of the dialog box. This will display your current folder list as shown in the left navigation pane within Outlook. Create a new folder called “Copied Only.” To do this, click “New.” In the “Create New Folder” dialog box, enter the new folder name, then be sure that the root mailbox name is selected, “jeff@dysonsphereco.com” in my case. This will ensure that the new folder does not get placed in a subfolder. See Figure 5. Click “Ok,” then be sure that the new “Copied Only” folder is shown in blue text. Click “Ok,” then click “Finish.”

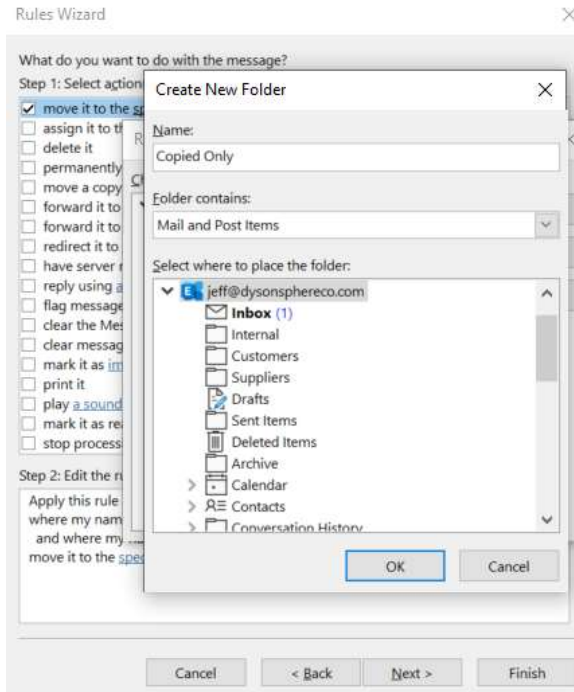


Figure 5. Creating a "Copied Only" Folder

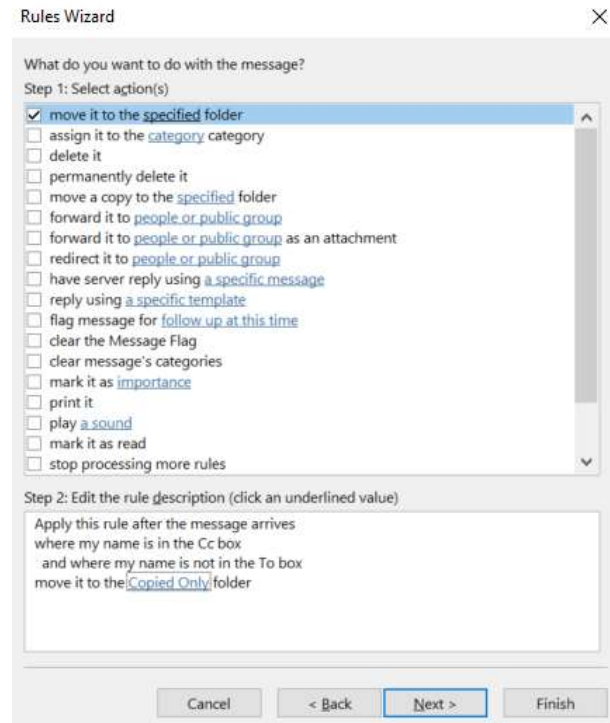


Figure 6. Completed rules parameters

The last step is to manually run the new rule to apply it to all existing emails. You can do this by clicking, “Run rules Now” in the “Rules and Alerts” dialog box. See Figure 7. In the “Run Rules Now” dialog box, select the “where my name is in the Cc box” and optionally select “Include subfolders” then click “Run Now” as shown in Figure 8.

## Customizing Microsoft Outlook for Efficiency

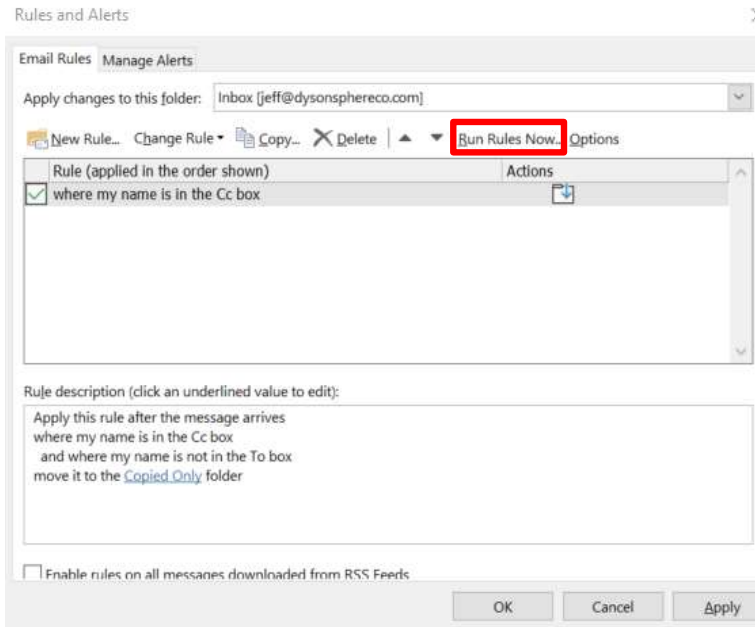


Figure 7. Selecting “Run Rules Now”

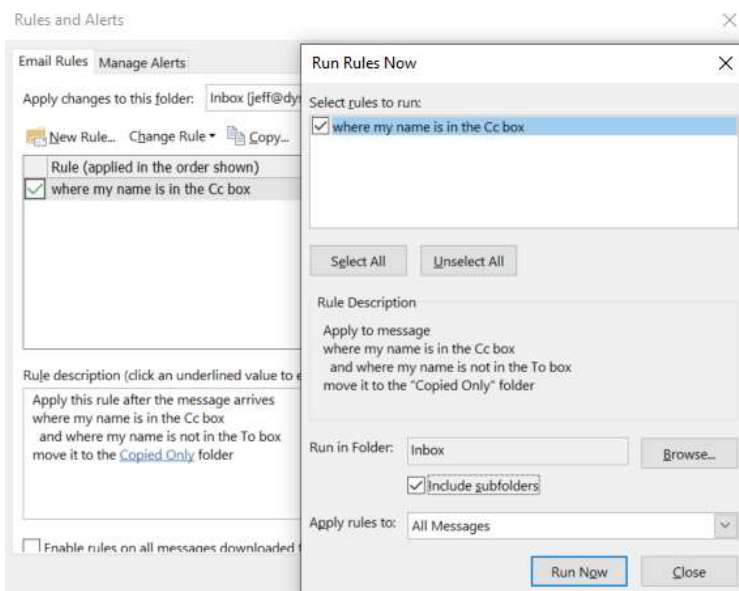


Figure 8. “Run Rules Now” dialog box

You will now see that all the emails which you are only copied on will be moved to the new “Copied Only” folder, and your inbox will be left with only emails in which you are at least one of the recipients in the “To:” line.

This may be enough to effectively archive the emails in the Copied Only folder, however I will now introduce a couple more ways to sort and filter this folder to further narrow down emails to archive. The first, and easiest, option is to archive mail that was received before a certain date. This can be done by using the search box to search for emails that are older than a specific date. I will explain in greater detail how to effectively use the search box in SECTION 11: USING OUTLOOK’S SEARCH FUNCTIONS, but for now you can click in the search box, then type, *received<“mm/dd/yyyy”* as shown in Figure 9. Note that you should match “mm/dd/yyyy” with computer’s date format, for instance often times the date format for European countries is “dd-mm-yyyy.” Ensure that “Current Folder” is selected to the left of the search field, which will ensure only emails within the current folder are shown. Now, only the emails before the chosen date will be shown. If you would like to select all of these for archive you can click on one of the emails, then press the Ctrl+A key combination to select all the emails, followed by the “Archive” button in the ribbon under the “Home” tab. If you would rather not archive all the emails shown and instead pick certain emails, you can select multiple emails for archival by either pressing the Ctrl key and selecting emails with the mouse, or holding down the Shift key and selecting two emails, in which case these two emails and all those shown in between will be selected.



Figure 9. Using search to show emails before a certain date

It is important to note that archiving does not mean that your emails will be deleted, however this may be dependent on the version of Outlook you are using and the settings of your system and organization. Microsoft has done a good job making sure that archived emails are available for retrieval if needed. If you are using Office 365, the archive folder is shown by default and cannot be deleted. The contents can be deleted, but unless your mailbox size does not permit it, it is recommended to keep archived emails for potential future needs.

You are now left with an inbox that contains emails where you are in the “To:” line and were received after a chosen date. This might still be unmanageable, so next

## Customizing Microsoft Outlook for Efficiency

we would like to show emails where you are the only person in the “To:” line. This will allow you to focus on just those emails that were sent to you and no one else, even if others were copied. To do this, we will utilize the “Search Folders” feature in Outlook, which has the benefit of being re-useable once set up. To set up this folder, right-click on the “Search Folders” folder shown in your navigation pane and select “New Search Folder,” see Figure 10. In the list that is shown under “Select a Search Folder,” scroll towards the bottom and select, “Create a custom Search Folder” as shown in Figure 11.

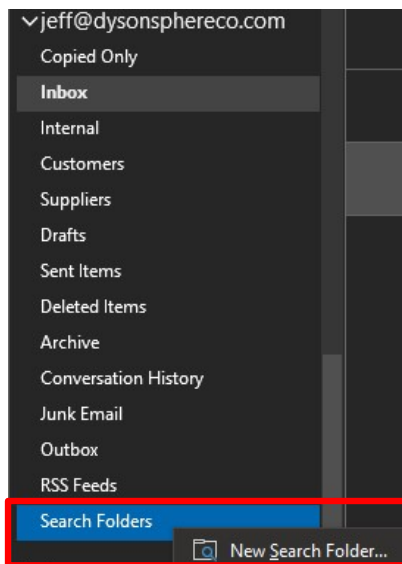


Figure 10. Creating a custom search folder

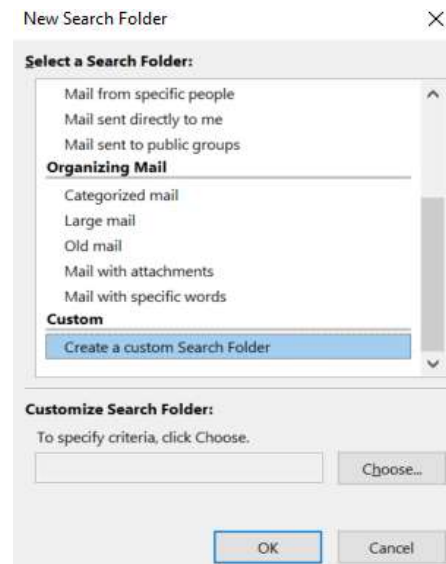


Figure 11. New Search Folder dialog box

Click on the “Choose” box in the bottom right corner of the dialog box, and select a name for the new search folder, in this case we will call it, “To Me Only.” Click on the “Browse” button below “Mail from these folders will be included in this Search Folder.” For our current purpose, we will only select “Inbox,” however you may want to expand this search to other folders depending on your situation. You can also choose to leave “Search subfolders” selected if you would like to include these in the search. See Figure 12.

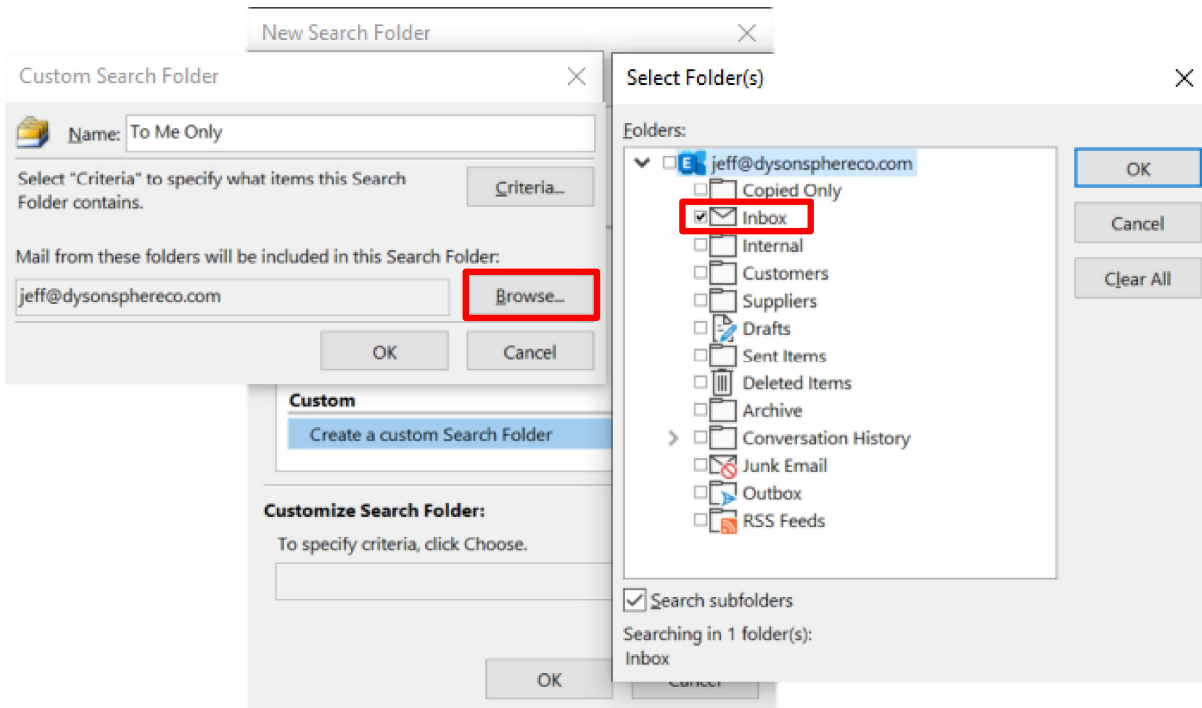


Figure 12. Selecting folders to be included in a search

Click “Ok” in the “Select Folder(s)” box and then click “Criteria.” In the “Messages” tab, select the box next to “Where I am” and then ensure that “the only person on the To line” is selected, see Figure 13. Click “Ok” until you have closed all the open dialog boxes. This search folder now shows emails from your Inbox in which only you are the recipient. Note that these emails have not been moved to this search folder, they are simply filtered and shown here, and you can interact with them the same as other emails. This difference with this folder is that the contents are dynamic, meaning that they will change based on how many emails are in your inbox that meet the criteria. This is a powerful feature, and there are several other ways we can put this to great use. We will cover more of this in SECTION 11: USING OUTLOOK’S SEARCH FUNCTIONS.

## Customizing Microsoft Outlook for Efficiency

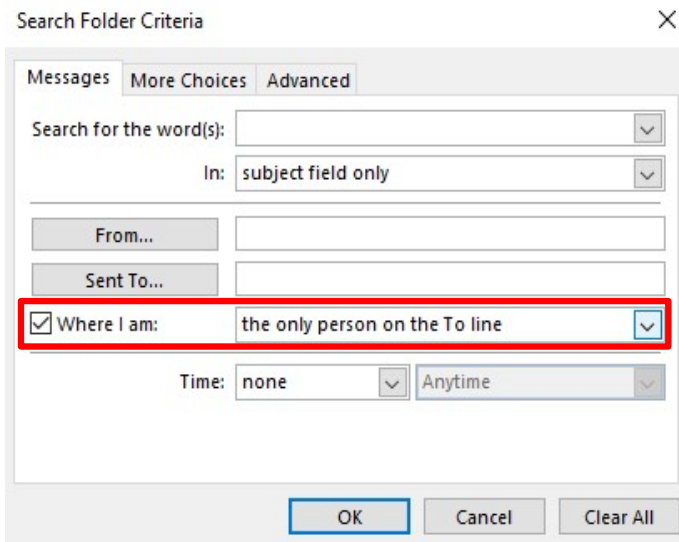


Figure 13. Setting search folder criteria

To this point, we have covered the essential steps to separate out emails which are likely important, and those which can be archived. This is only the first step! The rest of this handbook provides a deeper dive into effective use of Outlook features you are probably already familiar with as well as some you have never seen but are extremely useful for productivity and efficiency. Use of these tools to organize not only your existing emails, but also those you send and receive in the future, will result in an easily maintained and managed Outlook experience.