

How I use Outlook:

Rev 04/17/08

Intro:

Did I hear someone whine about email messages? Too many, too much spam, can't find them, cant track them can't keep them organized? I feel your pain – but excuse me, if you are using Outlook, I don't have a whole lot of sympathy. Outlook includes a numbers of tools, options and functions that can help you address email clutter and be more organized. Invest the time to learn how to use some of the features and it will pay off in the long run.

At the office, I receive and generate many hundreds of email messages each month. In addition to my own mailbox I also monitor and act on messages in three additional group mailboxes. At home I monitor messages from four different web sites in addition to my own mailbox full of spam. I have many hundreds of contacts in my email folders and it takes one full DVD to backup all of my archive folders.

To give you some idea of what can be done, I have includes some notes below about how I use Outlook 2003. Many of these options or features are easily enabled by looking in the help files and/or in newsletter articles or tips I have previously distributed. I may not be doing the best I can, but at least I feel like I have it under control.

1.0 General Settings and Functions

- 1.1 I have replaced the simple "FIND" function on my Outlook Toolbar with the ADVANCED FIND button – and have learned to search though all my messages and folders quickly and effectively.
- 1.2 I set my default mail format to RTF so I still have some formatting options, but don't make it impossible for people using AOL to read.
- 1.3 I have the Outlook Reading pane turned off preferring instead to have the extra room to view all of the message titles and to avoid being distracted as I glance through the list of messages.
- 1.4 I use Outlook 2003 as my default mail program at home as well as work, so what I learn to do in one office I can use in the other.
- 1.5 I have turned **off** the features which automatically respond to and then delete appointment requests.
- 1.6 I have automatic send and receive set for five minute intervals. That way new messages I prepare will rest in my Outbox for a few minutes before sending. Thus giving me time to reconsider, add forgotten attachments, etc.
- 1.7 I use bcc when sending messages to many people so that a spammer who gets hold of it can't pick up everyone's email address and so that someone can't accidentally "respond to all".
- 1.8 I have the new message notification balloon turned off – since I'm in email al day long, I'll find new messages soon enough without the added distraction while I'm working on something else.
- 1.9 I have Outlook Search items set up for messages from people I regularly look for in the Search Folders tool.

2.0 Keeping organized

- 2.1 I use the Outlook rules wizard to maintain over a dozen rules that automatically sort, copy and forward messages before I even have to look at them. Outlook rules help me prioritize which messages I need to look at and now which I can save for later.
- 2.2 I use a rule to separate new messages where I am only copied on the message to a "cc" folder. Thus "cc" messages are separated from the new messages sent directly to me. I read the "cc"

messages as time allows, presuming that if I am only copied, the message is for information not immediate action.

- 2.3 I use the Outlook Organize Tool to flag incoming messages from special people in a different color and different font.
 - 2.4 I use a rule to run a WAV file announcing messages from my manager – so I can be the best, most effective and responsive employee possible. *(there is probably a more cynical way to describe this type of employee)*
 - 2.5 I block a whole group of messages and “save as” a plain text file to create a single archive document of all the messages relating to a specific task, project or process. *Example, a long string of messages with ideas about a procedure change can be archived together in a single plain text file with one click.*
 - 2.6 When messages include attachments, I drag and drop a group of messages to a folder in My Computer. This creates individual message files including the attachments that I can sort or transfer.
 - 2.7 I use many personal archive folders and sub folders to sort and store messages by topic, subject, year, etc.. Thus when looking for a particular group of messages I can find them easier. *Example: messages relating to ISM.*
 - 2.8 I edit the subject line of messages when I’m reading them so that when stored or archived the message will be more meaningful.
 - 2.9 I have all folders that receive new messages appear in the Favorite Folders list so I can quickly see if new messages have arrived.
 - 2.10 I try to drag and drop messages to archive folders as I read and take action.
 - 2.11 I leave several weeks worth of messages in my in box and also my sent items folders so I can more easily respond to the questions I invariably get about , what, when , who, etc. It’s quicker than opening and closing the various archive folders each time I need to figure what happened yesterday.
 - 2.12 I delete old and unwanted email addresses from the autocomplete address line to help avoid sending emails to the wrong person.
 - 2.13 I permanently delete spam and unwanted messages without first sending them to the deleted items folder by holding down the shift key when I select delete.
 - 2.14 I use the Outlook auto archive function and set auto archive rules for each folder so I can clean up all of my email folders in one action.
 - 2.15 I use the auto archive function to permanently move items (after a week or two) from my inbox and sent items folders to my archive folders, so that I don’t have to remember to do it.
 - 2.16 I subscribe to two different “Using Outlook” email newsletters looking for tips and helpful tricks
- 3.0 Keeping the Size Down
- 3.1 I have the SIZE FIELD of messages displayed so that I can take action to move or delete super-large attachments before they use up all my personal mailbox space on the server
 - 3.2 I have the ATTACHMENT FIELD of each message displayed so I can quickly sort messages looking for the one that had a specific attachment.
 - 3.3 I delete or remove attachments from the messages, keeping only the message when appropriate. *Example: I save the message showing I sent a copy of a document to a vendor, but I remove the document from my record copy of the message – since I already have it in the file, I can save the extra space.*
- 4.0 Avoiding Spam & Malware
- 4.1 I use SPAM-BAYES (one of many free) anti-spam filters which I diligently train to separate spam messages from the rest of my mail.
 - 4.2 At home I also use Outlook’s Junk Mail filter to catch and discard even more spam messages.
 - 4.3 I use a Gmail account when an email address is needed on oddball web sites that might generate spam messages. I close and change the gmail account when the spam gets too much

- 4.4 I use Rules to sort new messages containing potential malware to a special folder so I am reminded to be more careful when looking at them. *Example: Since there have recently been a number of security warnings about malware hidden in ZIP files, I have a rule set up that sorts new messages containing ZIP files to a separate folder – thus I am reminded to be careful when I open messages in that folder.*

- 5.0 Communicating More Effectively
 - 5.1 I try to make the subject lines of messages I send meaningful so that recipients don't have to open the message to determine the importance of the message.
 - 5.2 I try to show a required action or response at the top of messages I send so the recipient won't miss it.

- 6.0 CYA
 - 6.1 I use a rule to file a copy of all new messages received from any one of our Legal Counsels into a personal folder I store locally on my hard drive. Thus I automatically have a backup copy of messages which could pertain to a legal issue or problem.
 - 6.2 I also use a rule to automatically save a copy of every message I send to any one of our Legal Counsels.
 - 6.3 I Use Outlook archive folders and Auto Archive functionality to store a copy of every message I send. I create a new archive folder at the beginning of each year so the archive doesn't get too big and I only need to have the current one open unless I'm searching an old archive for an old message. *Example: I know I received a message about this last year, so I can open and search the FY07 inbox folder, then close it when done.*

- 7.0 Building a Case File
 - 7.1 I set up separate Personal Archive folders to store correspondence relating to a specific topic. *Example: I store correspondence relating to "procedure revisions" in a separate archive folder.*
 - 7.2 I set up project-related archive folders on one of our network share areas to store messages relating to specific projects. Then when I am ready to transfer the workload, I can disconnect from the folder and the next person can connect to it to have access to all the email traffic.
 - 7.3 I include the case file number in message subjects and use a rule to automatically move backup copies to an archive folder
 - 7.4 I create all of my personal archive folders in one location on my hard drive so that I can make a backup copy of all of them to a DVD in a single step without missing some.

- 8.0 Remember things I am supposed to do
 - 8.1 I use the Outlook task list to track new action items, with start dates, and reminders.
 - 8.2 I use the Task List to schedule recurring reminders such as "check on the 5th of each month for a new..." When this month is checked as complete, Outlook automatically generates a new task for the 5th of next month. Reoccurrence scheduling is very flexible with many options.
 - 8.3 When I receive a message that creates a new task I drag the message and drop it on to the TASK Button. Outlook creates a new task with a copy of the message embedded in the task. Then I schedule the task to remind me and use my task list to track it as an action item.
 - 8.4 I ASSIGN tasks to people that are assisting me on special projects. This facilitates sharing information about the task and tracking it using reminders.

- 9.0 Tracking Contacts
 - 9.1 I scan a copy of new business cards and set up a new contact in Outlook for business associates. Outlook stores a copy of the business card and even a picture of the person along with the contact information.
 - 9.2 I create a new contact entry by dragging an email message to the Contact button. Outlook creates a new contact along with a copy of the message.

- 9.3 For personal contacts and friends I also add a birthday to the contact information. Outlook automatically adds an event reminder to my calendar.
 - 9.4 I add each new contact to one or more categories and use the categories to pull a list of specific contacts, such as the mailing list for the Board of directors.
 - 9.5 I add custom categories for special groups or projects. *Example: conference committee*
 - 9.6 I store travel-related contacts, hotels, airline reservation numbers, care rentals or unique locations in cities I visit regularly using a TRAVEL category.
 - 9.7 I store unique vendor information and names as contacts under a VENDOR category
 - 9.8 I use the Outlook MAP Button link to open a map to the contact address which I can print and take with me on a road trip.
 - 9.9 I use the mail-merge function to extract contacts from one or more categories and create custom email messages to each contact.
 - 9.10 I export contact information to an excel spreadsheet for sorting, analysis and in a password protected format for portability when traveling.
 - 9.11 I store my personal contact list in a password-protected personal archive folder that I can carry on a thumb drive between work and home, so I have a complete set of contact information wherever I am.
 - 9.12 I set up personal distribution lists of contacts so I can send an email message to a contact group all at one time.
 - 9.13 I switch between a contact list view (so I can quickly sort by company, city, etc.) and an index card view for quick access. I also use a custom contact view listing just the fields that are important to me (such as email address) when working on a special project.
- 10.0 Keeping track of my work
- 10.1 I have the journal set to log Word documents that I am working on and keep the log for a few weeks. That makes it easier to locate a misplaced document which I remembered working on last week.
- 11.0 I automatically forward copies of specific messages to other people I work with
- 11.1 Messages are sorted based on specific words in the subject or because they are from certain people. Outlook rules automatically forward, to someone who might be helping with tasks or certain projects.
 - 11.2 Messages delivered to one of three different group mailboxes get sorted, forwarded and stored in specific folders so that I don't have to touch them. *Example customer service surveys are all forwarded to the person tallying the results.*
 - 11.3 Contact links from our external web site contain subject lines that allow rule to direct specific message to the responsible person.
- 12.0 Calendar functions
- 12.1 I use a separate group calendar to track events and appointments which I share with a specific group of people such as an affiliate Board.
 - 12.2 I have a second time zone displayed for people I am communicating with in a distant location. Thus I can see at a glance what time it is there when I schedule a new task or appointment for a conference call.
 - 12.3 I print a monthly view of my calendar to carry around to meetings so that I can see at a glance what my month looks like when talking about future meetings.
 - 12.4 I print a monthly view of our training room calendar as a PDF file so I can forward it as an attachment to people who are planning training events.
 - 12.5 I color code important appointments and insert WAV file playback reminders.
 - 12.6 I use the automatic date function when scheduling an appointment or task to convert "60 days from now" to a specific date.
 - 12.7 I use a recurring appointment for regular meetings or events; such as a staff meeting

- 12.8 I block my calendar to show me out of the office whenever I am going to be on vacation or at an appointment somewhere else.
- 12.9 I drag and drop a specific appointment into an email message to invite an additional person to a meeting
- 12.10 I make sure that people I work with share their calendars so we can open them and verify each other's location or schedules.