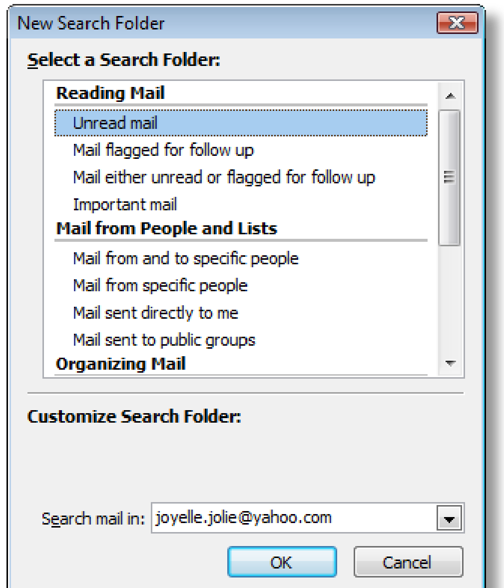
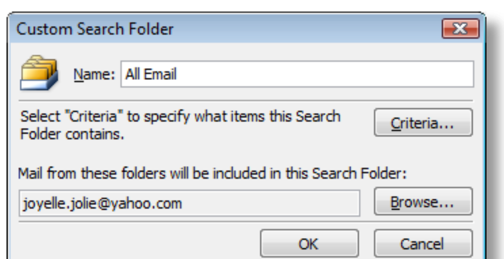
Search Folders

Search Folders are an excellent tool for locating messages in any folder in your mailbox based on criteria within the message. This is useful when regularly searching for the same items containing these criteria. It is analogous to a query in a database. **Note:** *Search Folders* ***do not*** store messages, but simply reflect the messages currently in the mailbox which contain criteria defined in the search folder. Thus the user is always going to see the most current items.



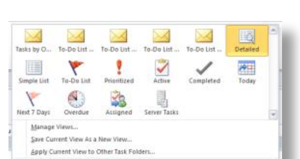
- To create a *Search Folder*, click Folder on the *Ribbon*, *Search Folder* select from the default preset *Search Folder* list and define the parameters in the dialog box.
- To create a global ***All Email*** *Search Folder*, in the above dialog box scroll down and click on *Create a Custom Search Folder*. Do NOT select any criteria for this *Search Folder* so that it does not filter any messages, but instead allows all messages to be displayed. This enables the user to view in one list any and all messages in any and all folders. This becomes an excellent tool for managing messages more quickly and efficiently.



- Once this *Search Folder* has been created, it is recommended that it be dragged up to the *Favorites* panel in the *Navigation Pane* for easy access.

Task Productivity

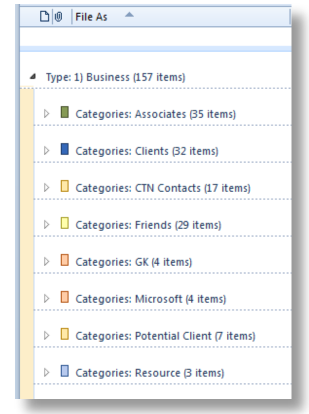
- Always align tasks to personal or professional goals – if necessary, develop the habit of specifying the goal that a task relates to as reinforcement
- Use the Task folder to review your Follow Up Flag items
- Drag message items to Task icon in the Navigation Panel to create a new Outlook Task item based on message content.
- Turn on the To Do panel in Calendar to view pending tasks below appointments



- Categorize all Tasks so that you can search based on category assigned
- Larger tasks should be transferred to your Calendar as appointments to book appropriate time. Otherwise, set aside time daily to review and complete tasks that are quick and easy to complete

Contact Productivity

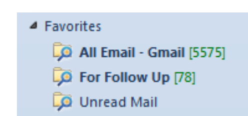
- Create and apply **Categories** to all contacts, then create a custom View with filter based on the categories assigned. To use a group of contacts based on a Category, simply switch view. Then perform a mail merge to create a form letter or labels out of the contact list in Outlook.
- Messages from new contacts can be dragged and dropped onto your Contacts icon to generate a new Outlook contact item.
- Create custom fields from the Field Chooser to further organize your contact details. Use Categories and Grouping to facilitate communication with your contacts
- Select the Contact group that you want to mail merge to then click the **Mail Merge** button to begin the merge process.



Navigation Pane – Favorites Panel

Now that we have implemented the features and tools that will help us maintain an organized Inbox, the final step is to the make specific folders available at the top of the Navigation Pane on the left side of your Outlook Window. The three that I recommend are:

- All Email (a Search Folder as the previous section described)
- Unread Mail – this will list any Unread items that may have been automatically processed by a rule to go into a folder, but which you still need to read
- Follow Up – this will list all messages which may include those in a folder that have been flagged for follow up



- To add these three folders in the Favourites panel, expand your Search Folders and click and drag each of these into the Favorites panel. They will remain there until removed.

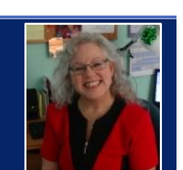
Calendar Productivity

- Now that you have created **Categories**, I recommend applying them to your Calendar entries to allow the colours to display on the calendar items so that it is clear where your time is being allocated.
- Use your Calendar as your priority scheduling tool and book time into each week – preferably on a Friday afternoon for the following week – to organize your next week's activities
- Drag and drop email items which reference new appointments onto your Calendar icon to automatically generate a new Outlook appointment item.

Resources

- Microsoft - https://support.office.com/en-GB/article/Outlook-2013-videos-and-tutorials-f83e8e60-0bab-47eb-8f6e-c2ecb73124d8
- Jill Duffy - Excellent 300 page eBook for $2.99 US http://getorganized.pressbooks.com
- Get Organized: 5 Tips for Microsoft Outlook - http://www.pcmag.com/article2/0,2817,2418518,00.asp
- http://www.wikihow.com/Organize-Yourself-Using-Microsoft-Outlook
- Overall office and home organization tips free 6 video series - http://simplesolutionsorganizers.com/landing/get-organized-free-video-series
- Take Back Your Life - https://www.youtube.com/watch?v=G-sNOskt-no

SparQ Corporate Training
(416) 432-8436
learn@sparqcorporatetraining.com
www.sparqcorporatetraining.com
www.youtube.com/sparqlearning/videos



Outlook Productivity Tips & Techniques

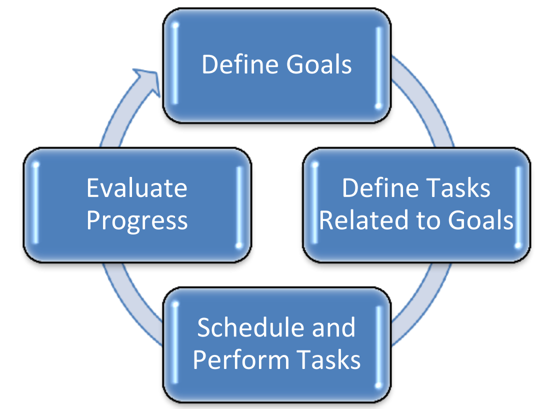
SparQ Corporate Training
www.sparqcorporatetraining.com

Productivity Concepts

Defining Goals and Objectives

The most important task when using any system for organizing information is to be clear on goals and objectives. Here is an illustration of the process of organization:

Productivity Lifecycle



In this illustration we can see that the starting point of organization is the planning and prioritization process. All of the actions we perform should contribute to the achievement of these goals. Outlook has many tools and features that help us at each step in the Productivity Lifecycle

Goal Categories

There are several goal categories to consider when defining goals

- Business goals
- Personal goals
- Project goals

Each of these can be incorporated into Outlook and organized using Folders and Categories as well as automated using QuickSteps and Rules as we will examine in this reference material.

Email Productivity

The most common component that people spend most of their time working with in Outlook is email. Receiving and processing email, therefore, is the most time-consuming. For this reason, it's important to be able to quickly make decisions about what each incoming and outgoing messages requires in order to act on it. Much of these decisions can be automated. But before we do this we need to follow some guidelines for minimizing or eliminating unnecessary email.

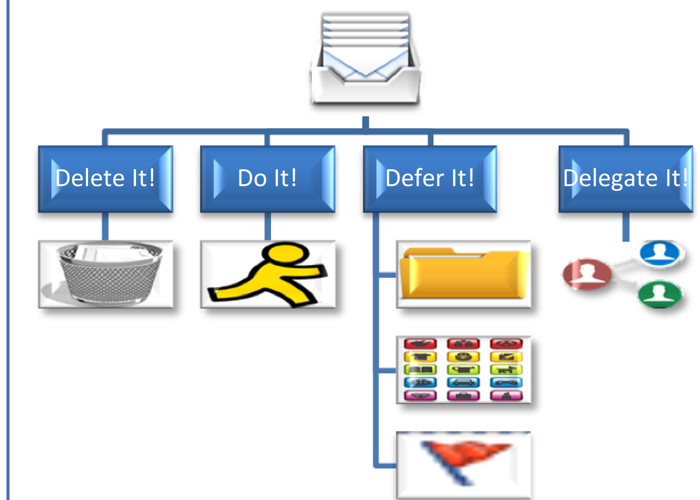
Minimizing Incoming and Outgoing Email

- Use the phone instead of email
- Meet in person
- Use available internal or external chat services
- Don't sign up for unnecessary newsletters or other services
- Ask to be removed from distribution lists
- Avoid sending unnecessary emails
- Avoid giving out business cards unless absolutely necessary
- Keep your email address confidential
- Always use the BCC (Blind Courtesy Copy) field when sending to a large distribution list

Information Management

4 D's of Information Management

Wherever possible apply one of these four actions on each incoming message as well as outgoing email.



REMEMBER: Touch each message ONLY ONCE wherever possible.

Delete It!

- For many users the bulk of incoming messages can be deleted once actioned. Doing this promptly saves having to revisit the email later and make the decision.

Do It!

- If the message requires an action and it can be completed within 2 minutes, perform the action immediately.

Defer It!

- This is the more challenging decision to make when processing email but if you have a system in place, the folder or category decision can be made a lot easier.

Delegate It!

- Clearly, this only applies if the user has someone to whom he/she can delegate, but if applicable, Outlook has tools to perform this action.

Staging Outlook

Preparing the Outlook environment is essential if you want to take advantage of all the productivity tools available which help you to promptly process Outlook information. Here are the specific tools recommended for easy access to the features used for organizing in Outlook: Quick Access Toolbar – customize this feature to add tools as follows:

- **Mail Tools**: New, Item, Reply, Forward, Navigate Up/Down, Categorize, Move to Folder, Rules, Reading Pane, Delete, Collapse All/Expand All, Find a Contact, Send/Receive, Filter Email
- **Calendar Tools**: Day, Week, Month Layouts
- **Contact Tools**: Show in Groups, Group By, Field Chooser
- **Task Tools**: - Complete/Incomplete check

Several of the above buttons function in all Outlook components, such as **New Item**.

In addition, you will want to enable the **Favourites** section in the **Navigation Pane**. We will be adding specific folders here.

Email and Contact Organization

Folders and Categories

Folders have been the conventional option for organizing email in Outlook for a number of years, but **Categories** are increasingly being adopted in many information management systems because of their versatility and power. Let's compare the two:

- Categories are *applied to* an email message and stay with the message wherever it's moved
- Many* Categories can be created and applied to any message
- 25 Category colours are available and can be applied to multiple Category names
- Categories do not allow for sub-categories
- Categories can be applied to ANY Outlook item – Email, Calendar, Contacts, Tasks, etc.

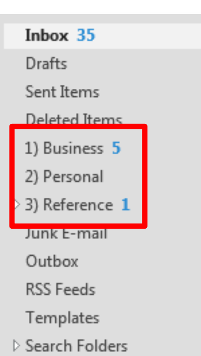
- Folders *contain* email messages
- Many* Folders can be created to store and organize messages but a message can only be stored in one Folder at a time (unless copied)
- Folders do not have colour attributes
- Folders do allow for sub-folders
- Folders are primarily used only on email (though folders can be created in other Outlook components)

**There may be technical specification limits such as the Outlook data file size but you are unlikely to ever reach that limit.*

For this reason, you will find that **Categories** – also referred to as **Tags** or **Labels** – give you much more flexibility in how you *Sort, Search, Filter, Group* messages in any folder. Furthermore, since **Categories** can be applied on any Outlook item, this can become a powerful way to search across all Outlook components – Mail, Calendar, Contacts and Tasks – for criteria that apply to all. Since Categories are applied TO an email message (or any item), it follows that item no matter where it is located. Even if it's archived to a PST folder, a user can still find it based on the category assigned. There are a myriad of ways of leveraging the **Categories** feature. We will take a look at a few here.

Folders

The key to managing email consistently is having a system. The simpler the better, because when processing huge volumes of email, you will need to be able to make decisions quickly. It's also useful to keep your Inbox clear and having fewer folders makes this easier to accomplish. For example, I've created the following three folder standard for email that works quite effectively because I can easily decide which of the 3 folders any message will go into.



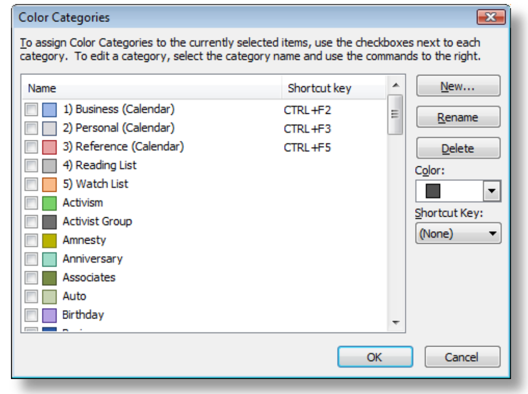
Note: These 3 folders are numbered to allow the user control over the positioning in the navigation pane. They will automatically place themselves below the four core system folders Inbox, Drafts, Sent Items and Deleted Items. Any items that arrive in the Inbox can either be immediately moved into these folders or be actioned first, then moved. We will want to complement the use of folders with Categories as described below. Furthermore, we are able to use QuickSteps and Rules to move messages into these folders based on criteria in the message. Finally, we can use Search Folders to display messages in a single list should we need to view them together.

You can decide what your folders will be named according to your own working style and the type of information that you manage. The key is to keep folders to a minimum. If you are inclined to have many folders, consider instead applying Categories to your messages and roll up the messages in sub-folders to a main folder. It is a much more versatile option for managing information.

- To create a folder select the Ribbon tab *Folder*, click *New Folder* and enter desired name. Using numbers at the beginning will place at the top of list.

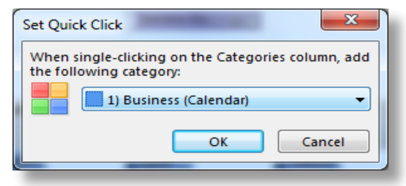
Categories

More and more **Categories** are being used to help in the process of organization. They function quite differently than folders as they are applied TO an email message. Since Categories have colour they can be an effective way to easily identify messages or other Outlook items quickly and action them. Here are some examples of Categories:



Plan your use of Categories carefully and consider how you might use them across ALL Outlook components. *Examples*:

- Clients
- Locations
- Departments
- Projects
- Activities
- Associations

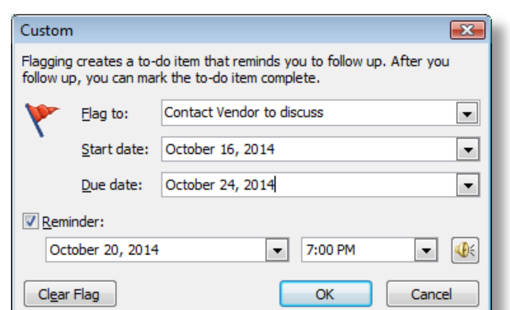


Be sure to set the **Quick-Click** default category so that you may easily apply the most common **Category** to email messages with the left mouse button.

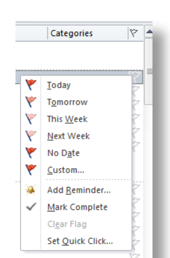
- To apply a **Category**, right-click in the Category column beside one or more selected messages and left-click the category name or select the *Categories* button on the *Home* tab on the Ribbon and choose a Category to apply.

Flags

Flags are used to quickly prioritize incoming communication with based on actions required in the email. As mentioned above, when a decision must be made on an item to do an action and that action must be postponed, flags can include reminders which are an effective way to see a reminder box appear on a date and time that is set with the flag.



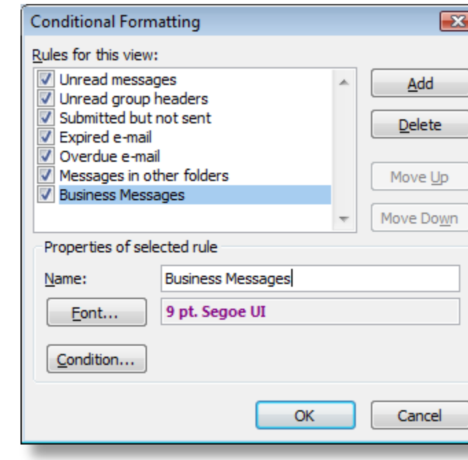
- To apply a **Flag** on any item including *Calendar, Contact, Task* items, right-click the **Flag** icon to the right of the message item, select from the context menu and/or click *Add Reminder* to customize the *Reminder* details.
- For custom flags/reminders, you can enter any reminder message in the **Flag to:** field. This will appear at the top of the message as well as in the Reminder dialog box on the date/time specified.



Automating Email Management

Conditional Formatting on a View

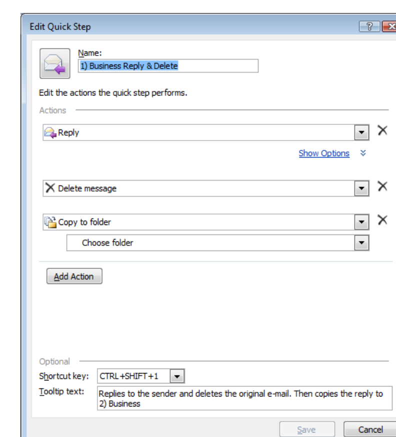
It may be a useful to apply conditional formatting on a view list in order to make it easier for important messages to stand out. For this we access Conditional Formatting from the View Settings dialog box.



- To access *Conditional Formatting*, select the *View* tab on the Ribbon, then *View Settings, Conditional Formatting*. Once selected, set the *Condition*, then the *Font* options.

QuickSteps

QuickSteps are an easy to use method of applying multiple actions on one or more selected messages regardless of criteria within the messages. This is how **QuickSteps** differs from **Rules**. However, for this reason you must select and apply the **QuickStep** manually. We access **QuickSteps** from the Home Tab. We decide on the actions to be performed and any related settings such as the folder name or category name. Note that we can assign a *Shortcut Key* to make the **QuickStep** more accessible.

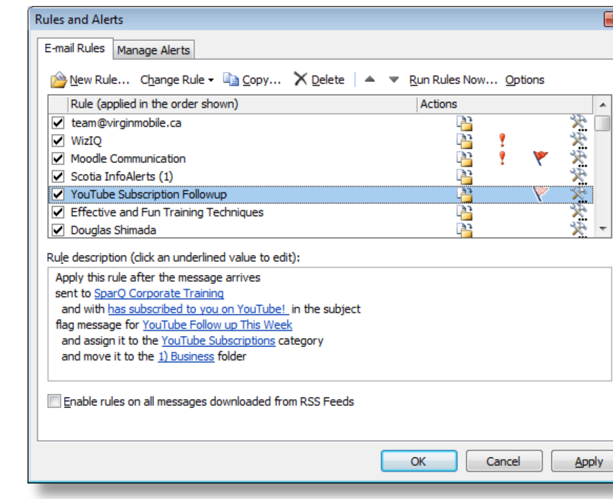


- To create a QuickStep, select the *Create New* option from within the *QuickSteps* gallery on the *Home* tab on the *Ribbon*. Once in the *QuickSteps* dialog box enter the name, action(s) and parameters based on your requirements and click OK to complete.
- You can create many QuickSteps based on your needs.
- QuickSteps are applied to selected messages as required.
- When applying a QuickStep to selected messages, please be sure only the messages which require ALL actions are included in the selection.
- You cannot undo a QuickStep. To reverse actions performed by a QuickStep, you will have to do them manually. i.e. Move messages out of the folder, remove the Category, etc.

Rules

Rules are one of the most popular and powerful features for automating email handling. When implementing Rules, it's important to plan for the kind of criteria which will 'trigger' the actions that the Rule is designed to perform. For example, will the Rule perform its actions based on the Sender name or content in the Subject field or a combination of several criteria values? There are 3 steps to go through in the creation of a Rule:

- **Condition(s)** – this will be the criteria within the message that determines what the action should be based on messages that have this condition
- **Action(s)** – this will be the step(s) to perform on the message once it has been determined that it meets the criteria values
- **Exception(s)** – this will be the specific exceptions which will cause the message to be excluded from having the action(s) performed



A user can have many **Rules** configured so that many or most messages that arrive in the user's Inbox are automatically processed. Rules can be edited at any time should the criteria or actions need updating.

Allow *Rules* to do the bulk of the email management for you! This means you will only be left with those messages which are exceptions to the criteria used in your *Rules*. The more that you can get *Rules* to do your email handling, the better.

Note: Most Rules can only run when the user's workstation is running Outlook. Rules cannot be undone but can be manually reversed in most cases.

Examples of messages to manage with Rules

- Common client messages
- Common coworker messages
- Common projects messages
- Common subject line messages
- Common distribution list messages
- Any other items which are routinely managed through the use of folders, categories or flags.

Creating a Rule

- Select the *Rules* drop down button on the *Home* tab on the *Ribbon*.
- Click Create *Rule* command
- Apply criteria and actions or click **Advanced Options** for step-by-step
- **Step 1** – Specific the condition or criteria in the messages arriving
- **Step 2** – Specify the action to be applied to messages
- **Step 3** – Specify any exceptions to exclude messages based on criteria
- **Step 4** – Provide a meaningful name for the Rule and test on Inbox

Once you've created your **Rules**, you can back them up by accessing the Manage Rules and Alerts dialog box. Click Options, Export Rules to save your rules in a file. You can then use Import Rules if Outlook must be reinstalled or updated.