Advanced Email Management
Agenda

• Outlook Tools of 2013/2016
  • Categories
  • Flags
  • Quick Steps
  • Rules
  • Search Folders
  • Auto-Archive
• Processing Email – Inbox Zero
Categories

• Ability to Color-Code and apply Keywords to Messages, Calendar entries, Contacts and Notes.
• Multiple Categories per item
Follow-Up Flags

• Due Dates for Outlook Items (mail, calendar, contacts, notes)
• Reminders can be setup (similar to calendar entries)
• Viewable in Message list and Tasks View
Quick Steps

• Outlook Macros
  • Change Properties of items
  • Move items around account
  • Delete items
  • Create new message or calendar based on selected item
Rules

• Automatically do things to Outlook items without user intervention.
• Move, delete, apply flags and categories
• Can be on Receive or Sending of messages.
Search Folders

Search Folder Criteria

Select a Search Folder:
- Mail sent directly to me
- Mail sent to public groups
- Organizing Mail
  - Categorized mail
  - Large mail
  - Old mail
  - Mail with attachments
  - Mail with specific words
- Custom
  - Create a custom Search Folder

Customize Search Folder:
To specify criteria, click Choose.

OK Cancel
Archiving

• Folder polices for personally created folders
• Online Archive policies for system folders such as Inbox, Sent Items, Deleted Items, etc…
Inbox Zero – by Merlin Mann

• Merlin Mann was inspired by David Allen’s “Getting Things Done”
• Basic Actions for all new messages
  • Delete It
  • Delegate It
  • Defer It
  • Do It
  • Document It
• Don’t be glued to “New Messages”
If you check your inbox every 5 minutes, you are checking it 23,400 a year. (37.5 hours /week * 52 weeks)
Delete It

If you don’t need it, or need to do anything with it. Just delete it.
Delegate It

If the message is something you’re not going to handle, forward it on to somebody else.
Defer It

If it’s going to take you longer than 2 minutes, save it for later. Once the inbox has been triaged, go back to deferred items.
Do It

If you can answer the message in 2 minutes or less, don’t save it for later. Get it done right away.
Document It (Archive It)

Save the message in your archive of messages.
My Categories

- @FullFocus
- EMS
- EMS-ASHI
- EMS-County
- EMS-GFAC
- EMS-QRS
- NetTel-AccountChange
- NetTel-Datacenter
- NetTel-Microsoft
- NetTel-Networking
- NetTel-Security
- P-Audit
- P-CampusDrill
- P-DellEncrypt
- P-EventTracker
- P-Heat
- P-ID Management
- Prof-Develoment
- WCU-Business
- WCU-IS Stuff
- Personal
My Email

• Quick Steps
  • Delegate & Archive
  • Defer Tomorrow
  • Move-To-Mine-Flag Today
  • Delegate & Defer Tomorrow
  • Archive It
  • Create an appointment

• Rules & Alerts
  • VIP Alarm (client-only)
  • Mailing List Subjects
  • Inbox-Social-Subjects
  • Inbox-Updates-Froms
  • Inbox-Updates-Subjects
  • Inbox-Promotions-(unsubscribe)
  • Inbox-Updates-1105info.com
Search Folders

• !Due Today
  • Flagged by me
  • Due Date on or before [today]
• !Future
  • Start Date on or after [tomorrow]
• !Inbox Triage
  • Start Date does not exist
• Full-Focus Listing
  • Category is @FullFocus
• VIP
  • From {Specific Users. Duplicate in VIP Alarm Alert}
My Other Settings

- Mail Arrival – Turn off ALL notifications
  - VIP Alert will still alarm when needed.
- Advanced Setting: Start Outlook in this folder
  - Set to !DueToday search folder
  - Turn off Empty Deleted Items when exiting Outlook