Be Stabile

Organizing Outlook Reference Guide

Updated January 13, 2020

As a follow up to the on-site Organizing Outlook training, this document includes select ideas and instructions focused around the questions and conversations had during the session. There are three sections: Overall Strategy; Steps to implement, at a high level; and then some detailed How-Tos.

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Mailbox Overall Strategy

The Inbox is for unprocessed items only.
The Inbox should only contain new mail, or mail that is still waiting to get added to the appropriate task list (Outlook Tasks or Asana). Things you want to keep for reference should be filed away in a folder or archived. The new items are "unprocessed," and the goal is to make the Inbox folder the place where only unprocessed items live.

Be disciplined about adding everything to your task list.
You need to be able to trust your system. All email that requires action, even if it is just an email response, should be cataloged. If you are confident all of the things you need to do are in a predictable system you can save valuable mental energy by not juggling things in your head, and save time by not digging around.

Give yourself permission to not check email.
It's important to be able to focus on what you're doing. If you have notifications appearing, or you feel obligated to always respond to messages right away, your mind isn't fully on the task at hand. Reduce your cognitive load so you can be more productive.
Turn off alerts and only check email a few times a day, and determine the best time of day for you to process your Inbox.

Cultivate good housekeeping habits.

- You want to regularly clear out your Inbox, ideally once a day. Add new items to your task list.
- Clean out any completed tasks from your Follow Up list or TO DO folder daily.
- Regularly check your junk folder for any misdirected messages.
- Groom your Rules to keep less important messages in check.

Steps to Implement

Step 1

Decide what works best for you in terms of tracking email that requires some kind of follow up. Will you use the Follow Up flags or Asana for everything?

In either case, set up a TO DO folder for storing the messages related to these tasks so they can all be found quickly and won't clutter your Inbox.

Step 2

Configure Archive and Delete. Once you've set the default AutoArchive settings for all your email, you can configure more targeted settings for folders.

Step 3

Start cleaning your Inbox out. Budget 30 minutes per day or a couple hours per week until the Inbox is clear and all old messages are filed in the proper place.

Unsubscribe from newsletters or other lists no one actually reads. Do a search on "unsubscribe" to quickly find emails with unsubscribe links.

Set up rules to automatically move new email that is potentially informative/interesting but not important to a designated folder (like Newsletters). Set those folders to purge automatically.

Step 4

Set up Quick Steps for multi-step repeatable tasks, such as Flag for Follow Up and then move to TO DO folder.

Step 5

Snooze or turn off desktop or phone app notifications.

Create a rule to have VIP messages open the New Item Alert, or set up other features to highlight important messages.

HOW-TO

Set up a TO DO folder

- Create a TO DO folder and put it at the top of your folder list.
- Move all messages related to any follow up action - whether Follow Up flags, Asana or otherwise. These messages should be in one place so they can quickly be found and reviewed.
- When complete, items should be moved to the relevant client or category folder.

Set up Archive & Delete

Review the default AutoArchive settings

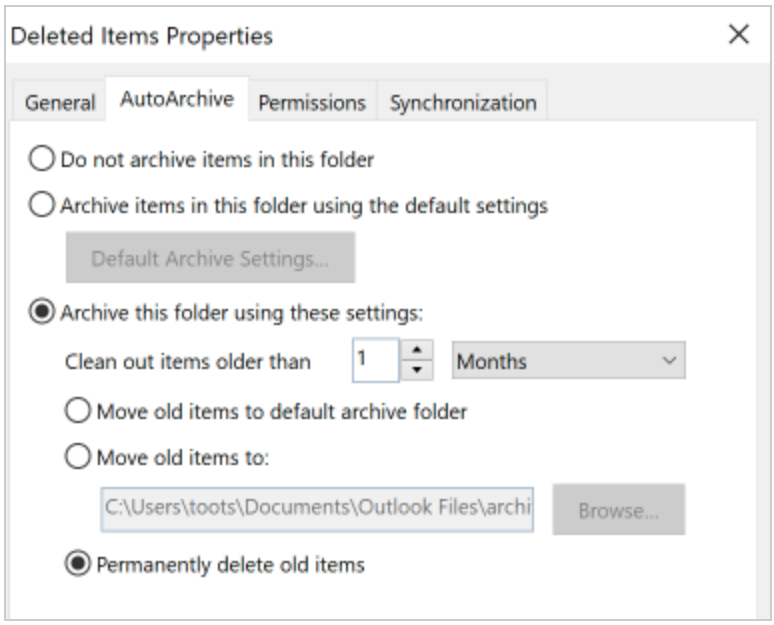
- To view, go to **File > Options** > **Advanced** > **AutoArchive Settings...**
- Check box for **Run AutoArchive**. This will run these rules on all unarchived mail. Leave the frequency at 14 days to run these cleanup rules every two weeks.
- If you'd like a warning before each time it runs, select **Prompt before AutoArchive runs**.
- You can leave **Delete expired items (e-mail folders only)** checked. This relates to emails which have had an expiry date added to them. It will not affect events or tasks.
- Check the box for **Archive or delete old items**
  And **Show Archive folder in folder list**.
- Under **Default folder settings for archiving**,
- Set **Clean out items older than** to **30 days**
- Select **Move old items to:** and either leave the default or choose where on your computer you'd like the Archive.pst file to be stored.
  Note that if this .pst file gets incredibly large, it can slow down Outlook.

Configure the Deleted items folder to automatically purge

Using AutoArchive to handle this provides a grace period for accidentally deleted items, and makes shutting down Outlook faster.

- In the left folder list, right click on the Deleted Items folder and choose **Properties**, then **AutoArchive** tab.
- Choose the option to '**Archive this folder using these settings**' and enter a period of time with enough buffer to retrieve something that may have accidentally been deleted.

- To really get rid of the emails forever select **Permanently delete old items**

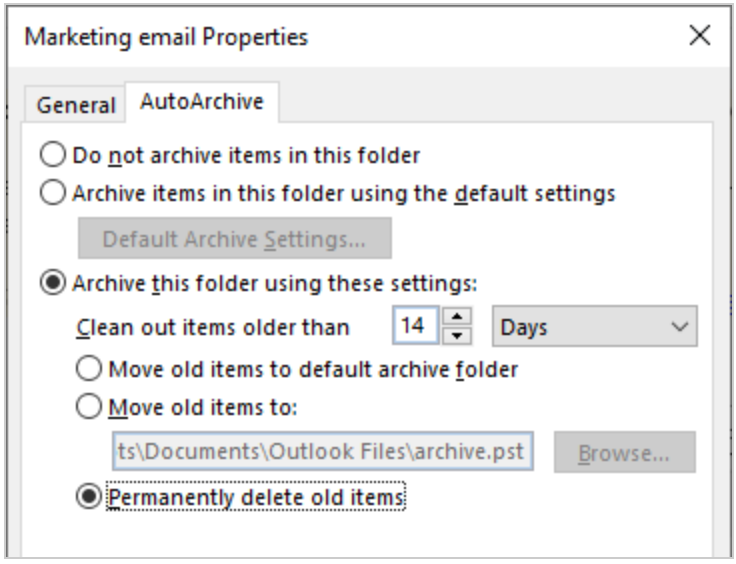


Turn off automatic Empty Deleted Items folders when exiting Outlook

- If you use this feature you don't get the grace period the AutoArchive settings allows. It will delete all the messages every time you quit Outlook.
- Go to **File** > **Options** > **Advanced**
- Under Outlook Start and Exit, make sure the Empty Deleted Items folders when exiting Outlook is *not* checked.

Configure AutoArchive delete settings for other short-term folders

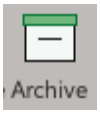
- Choose a folder that is used for content that gets stale, like newletters.
- In the left folder list, right click on the Deleted Items folder and choose **Properties**, then **AutoArchive** tab.
- Choose the option to '**Archive this folder using these settings**' and enter a period of time that provides enough time to retrieve something I may have accidentally deleted.
- To really get rid of the emails forever select **Permanently delete old items.**



- Repeat this on any other folders that hold content which is not evergreen.

Manually moving things to the Archive folder

The Archive folder should appear in the folder list.



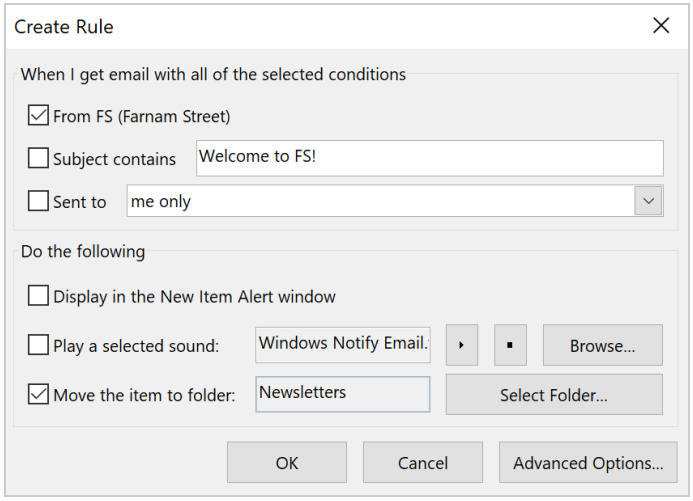
- Use the file box button to move selected messages to the Archive folder, Or you can drag emails into the Archive folder.
- Move items here that aren't garbage but shouldn't be in your Inbox or important folders.
- You can set AutoArchive settings for this folder the same way it is done for any other folder (see above).

For further, detailed instructions, check out these AutoArchive setup instructions by How To Geek here.

Managing Newsletters and other subscribed emails with Rules

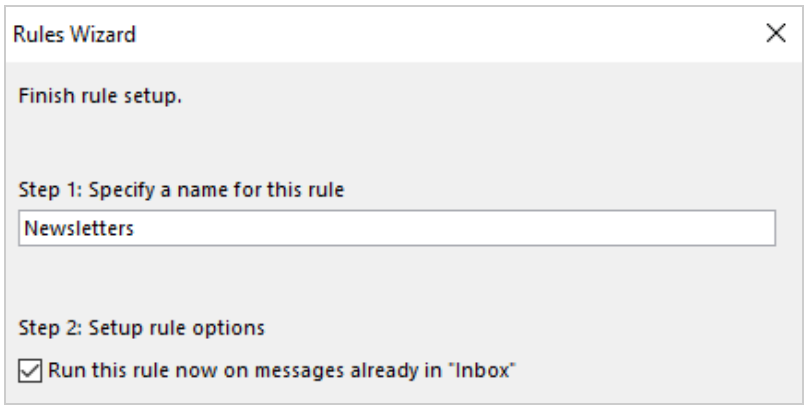
Things you subscribe to can clutter your Inbox, and though it might be interesting, it's distracting you from more important items. To keep these things out of your way until you want them, create a Rule to automatically move anything that is potentially informative but not important. They should live in a designated folder that can automatically purge after a specified period of time.

- First, **create a folder** for the subscription type. For example, Newsletters.
- The very first time you come across one of these messages in your Inbox click **Rules > Create Rule**
- In the Create Rule window select the first option, **From [so and so company]**



- Under Do the following check **Move the item to folder** and choose your Newsletter folder.
- Click **Advanced Options** and click **Next** through the Wizard until you reach the last step **Finish rule setup.**
- **Name the rule** to match your folder name.

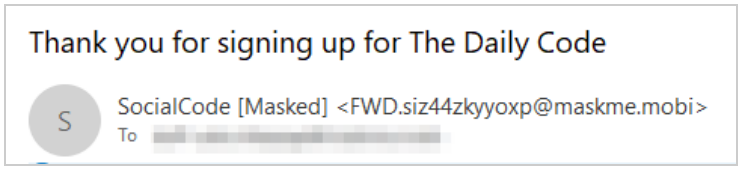
- Click **Run this rule now on messages already in "Inbox"** then **Finish.**



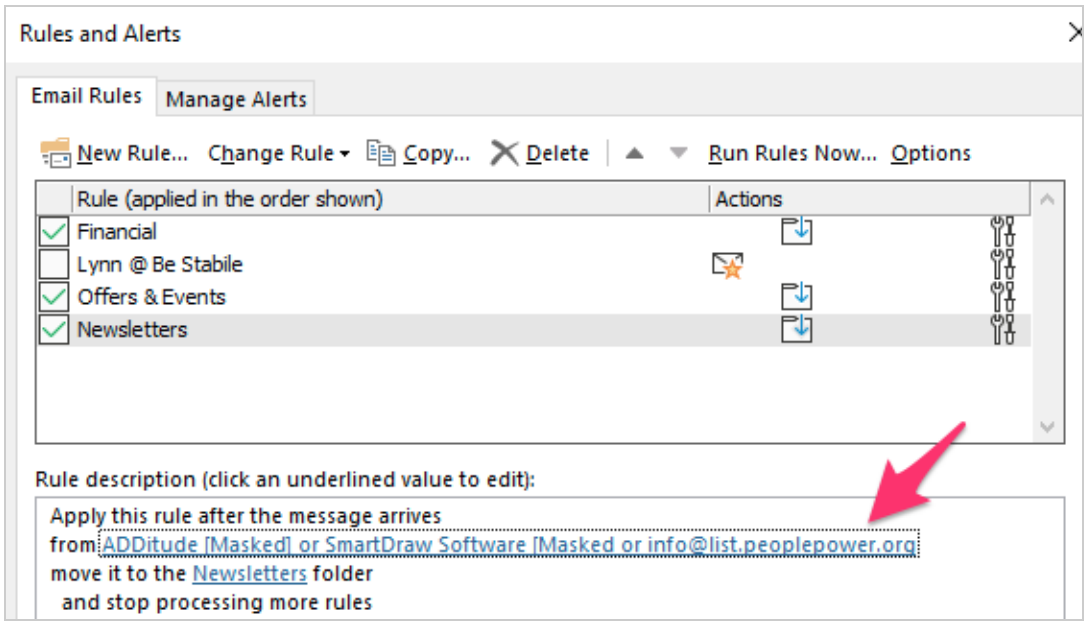
Once this Rule is setup, re-use the same rule for other newsletters.

It is better to add new sender emails to an existing rule than use the menu shortcut "Always Move Messages From X". The Rules list would get long and quite difficult to manage.

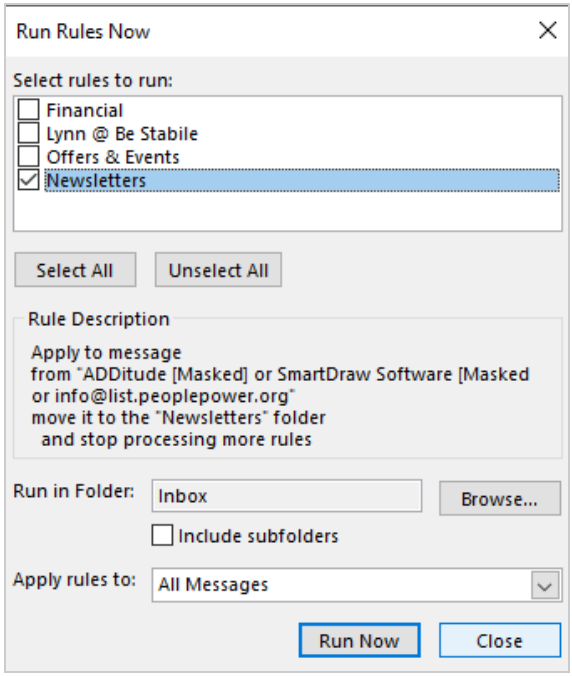
- Whenever you come across a newsletter message in your Inbox **copy the sender email address**.



- In the top menu click **Rules > Manage Rules & Alerts**
- Select the Newsletter rule you already created…
- In the Rule description box **click the blue underlined *from*** text



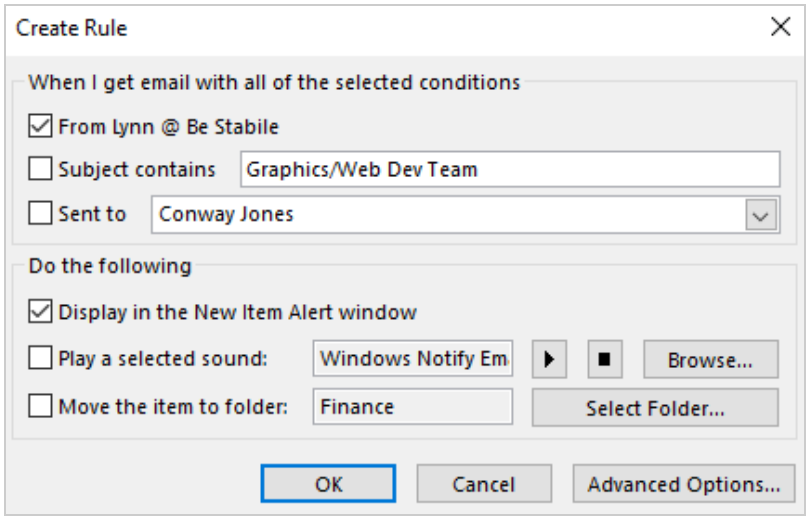
- A Contact window will open
- **Paste the email address into the From field** and click **OK**
- On the **Rules and Alerts** window, click **Run Rules Now...**
- Select the **Newsletter** rule you just updated, and click **Run Now** so all older messages from this sender will be moved



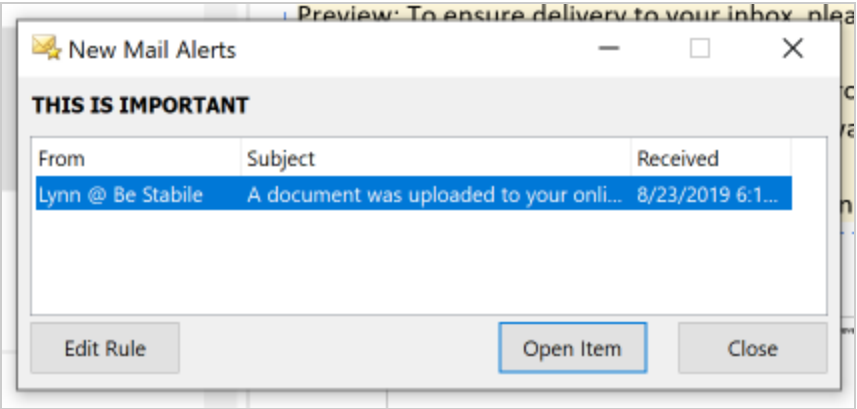
Ways to ensure important messages aren't missed

Create a Rule to send a New Item Alert when a message from an important sender is received

- With a message from the sender open click **Rules > Create Rule**
- In the Create Rule window **select the first option, From [so and so VIP]**



- Under “Do the following”, check **Display in the New Item Alert window**
- Click **OK**
- When a message is received from this person, the New Item Alert will open a small Outlook window.

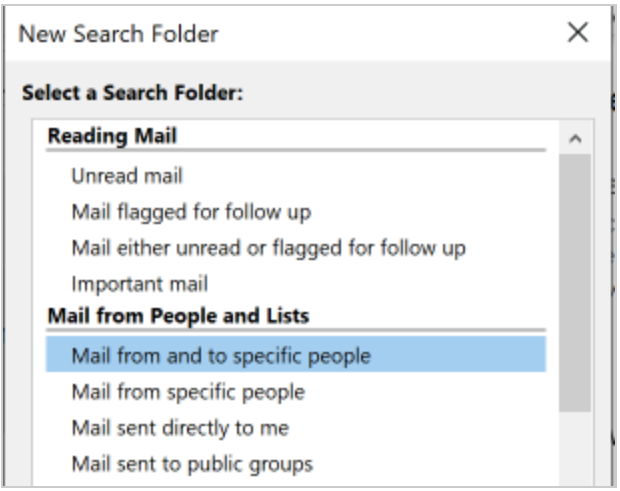


How to turn off Windows 10 regular desktop alerts and only have New Item Alert

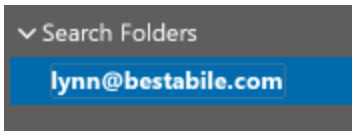
- Click in the **Windows search box** and type “notifications”
- Select **Turn app notifications on or off**
- In the **Notifications & actions** page scroll down and **turn the Outlook toggle off**

Create a Search Folder for a Very Important Person or Company

- Scroll all the way to the bottom of the left folder panel
- Right click **Search Folders** and select **New Search Folder**
- In the list, select **Mail from and to specific people**
- **Enter the email address** or addresses and select the mailbox to search, then click **OK**



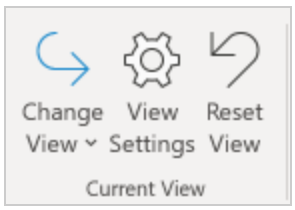
- The search folder will be created and appear at the bottom of the folder panel under Search Folders.



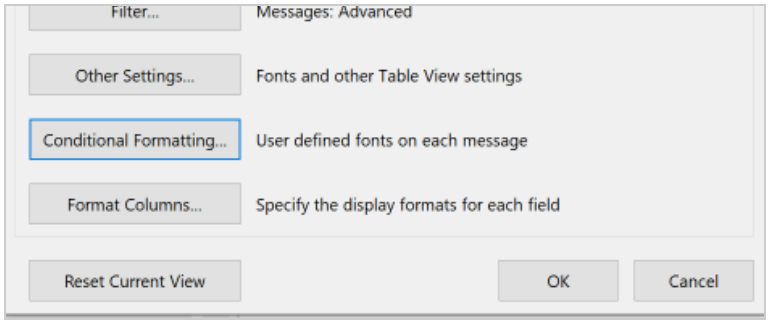
- It has a default name which can be changed with a right click.
- Since Search Folders are alll the way at the bottom, right click on the folder name and **select Add to Favorites** so it will appear at the top

Apply a Conditional formatting rule

- With a message from the sender highlighted, go to the **View** tab > **Current View** group > select **View Settings**.

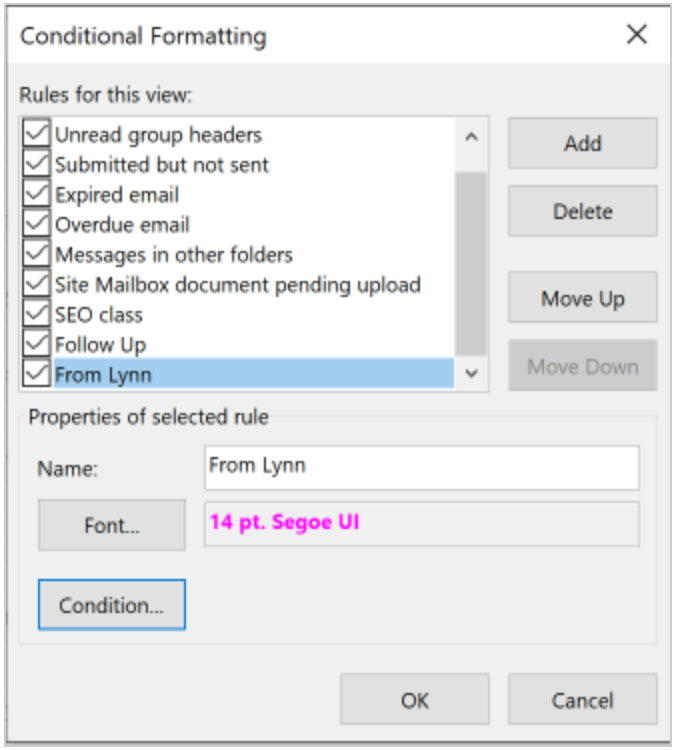
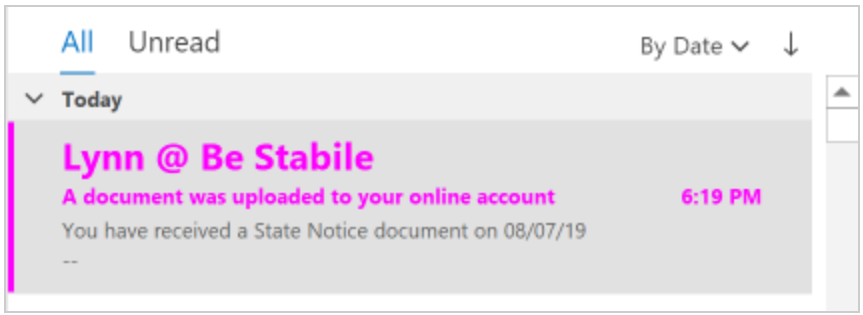


- In the Advanced View Settings dialog box, select **Conditional Formatting**



- In the Conditional Formatting window click **Add** and give it a meaningful name
- Click **Font...** and change the color and or style to make it stand out

- Click **Condition** and enter the sender email address in the **From** field



- After you click **OK**, all the messages from this sender should display with the new font styles