Advanced Email Management
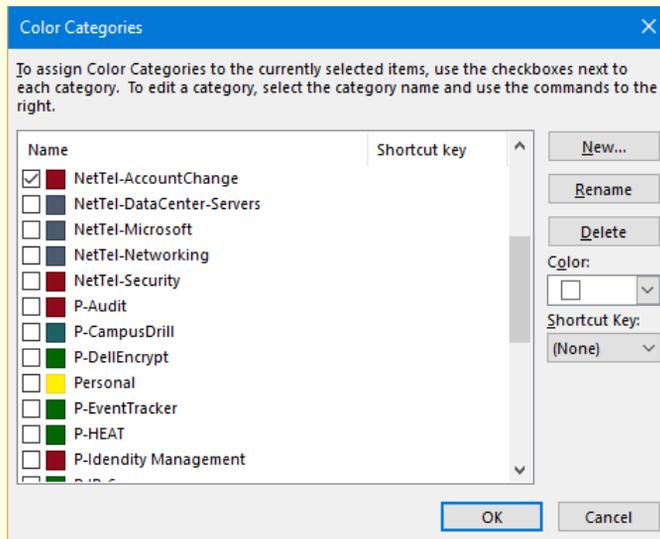
Agenda

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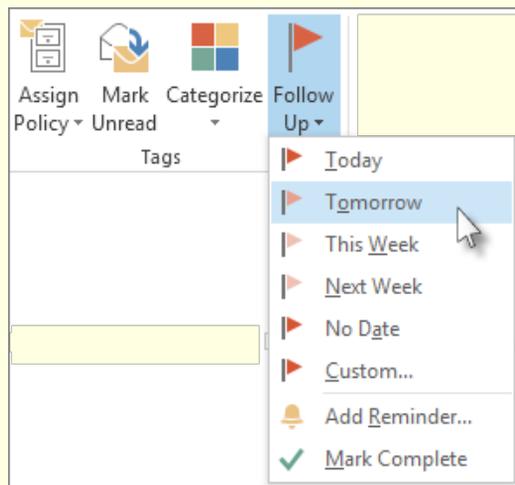- Processing Email –Inbox Zero

Categories

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

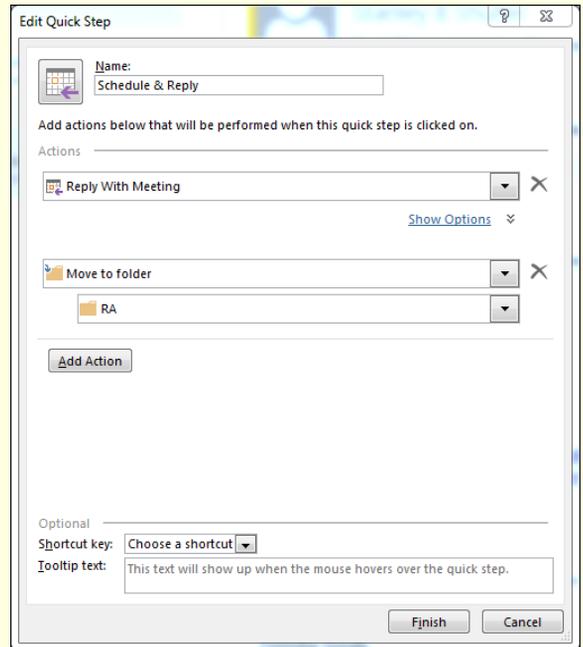_____

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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

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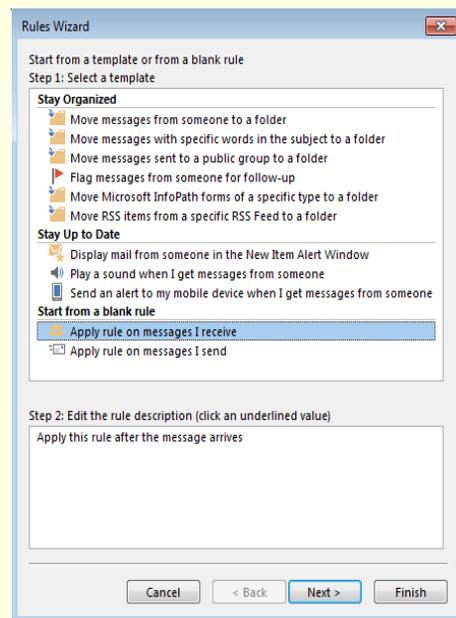
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Quick Steps

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

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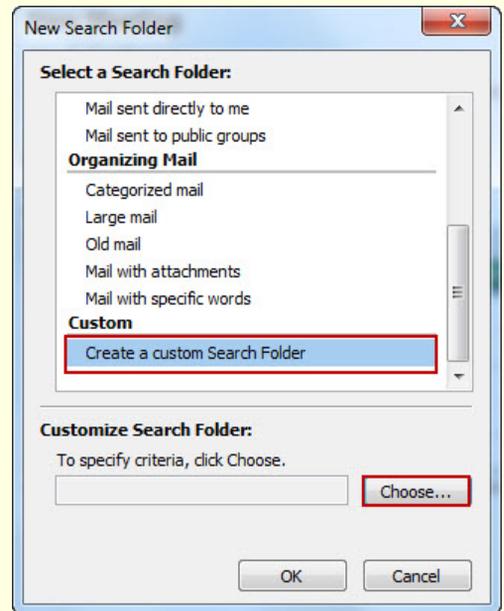_____

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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

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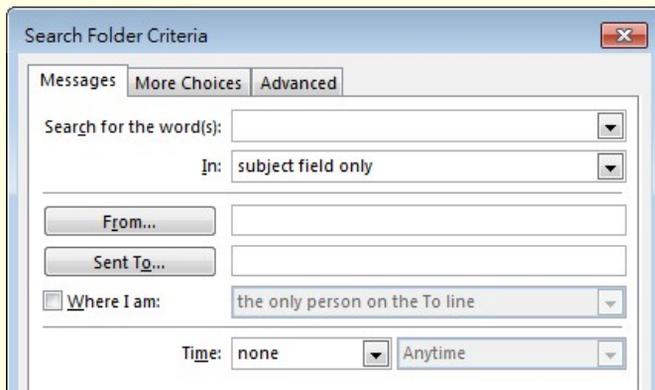
Archiving

- Folder polices for personally created folders
- Online Archive policies for system folders such as Inbox, Sent Items, Deleted Items, etc…

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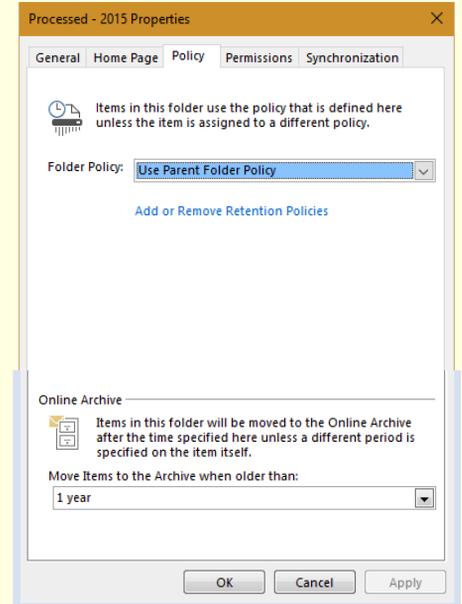
Inbox Zero – by Merlin Mann

- 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"

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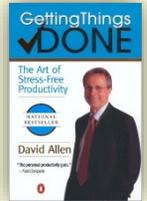
If you check your inbox every 5 minutes,
you are checking it 23,400 a year.
(37.5 hours /week * 52 weeks)

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Delete It

If you don't need it, or need to do anything with it. Just delete it.

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Delegate It

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

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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.

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Do It

If you can answer the message in 2 minutes or less, don't save it for later. Get it done right away.

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Document It (Archive It)

Save the message in your archive of messages.

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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

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My Email

- Quick Steps
  - Delegate & Archive
  - Defer Tomorrow
  - Move-To-Mine-FlagToday
  - 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

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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}

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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

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