



Hour 9

Keeping Email Organized

Like many users, you probably get a lot of email. Maybe not enough to say you have email overload, but you get enough that you need to organize it. Too much of your mail is spam or ads and you delete those as they arrive. Other messages are important and you might add flags to them or move them to other folders. Then you can't find them without using Advanced Find or custom views. To make organizing and locating your messages easier, Outlook 2003 has three new features: Quick Flags, Search Folders, and Favorite Folders.

This hour introduces you to these new features in Outlook 2003 as well as helps you make better use of all the folder management features, including

- Using Quick Flags
- Making the most of Search Folders
- Using Favorite Folders
- Creating and deleting folders

Using Quick Flags

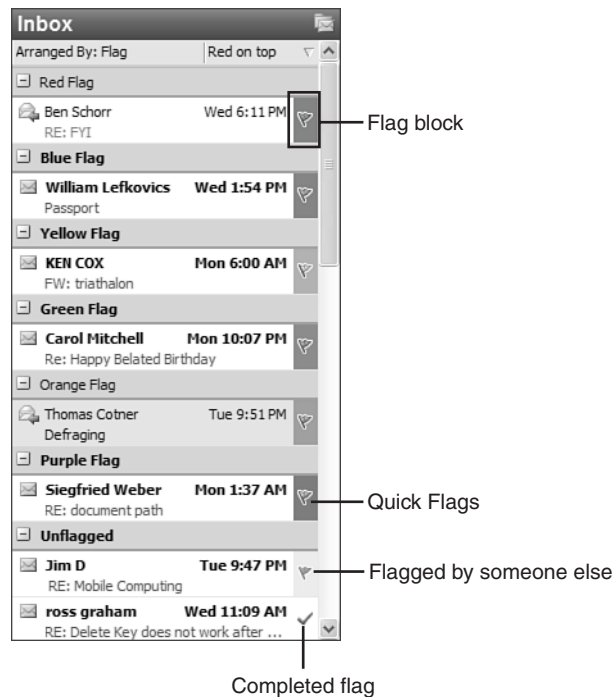
Because flagging every message that needed action with an identical red flag meant every message was flagged, many users adopted the unread method of mail management. All unread messages needed action and Outlook's feature of automatically marking mail viewed in the preview pane as read is disabled. Flags and reminders were reserved for only the most important messages.

Quick Flags will change message management for many users. Flagging your messages with different-colored flags means that every message no longer has an identical flag. You can customize the mail list view and remove the flag field from your normal view, and use Search Folders to view only the flagged messages. Using customized Search Folders, you can see filtered views of all the messages in your mailbox.

Quick Flags are cool. Click on the flag block in the message list and a flag is added to the message, using the default flag color (see Figure 9.1). If you want to use a different color flag, that's easy enough: just right-click the block and choose a new flag color. Click once again to mark the flag as complete.

FIGURE 9.1

Use Outlook's Quick Flags to mark messages for follow up.



Quick Flags come in six colors: red (default color), blue, green, orange, yellow, and purple. You can change the default color from red, but the colors and labels aren't customizable. If you want to see the red flag labeled Important, you must create a custom toolbar. See "Create a Quick Flag Toolbar" later in this hour to learn how .



The Quick Flag block works only on messages. You can flag other Outlook items, including notes, using the colored flags displayed in the Flag Status column.

Outlook's Original Flag

Outlook's original red flag is still alive and well in Outlook 2003, and is used on items flagged using older versions of Outlook or when flagged messages are sent to you. Nonmessage items support the new flag colors but not the Quick Flag box.



Customize the view on any folder to include the Flag Status field. In the Show Fields dialog, select All Mail Fields in the Select Available Fields From: list and add the Flag Status field to the view. Don't let the fact that it's in All Mail Fields keep you from using it—it works on all folder types.

Messages flagged with red flags aren't listed in the By Follow Up Search Folder. You must create a custom Search Folder, using the Only Items Which: Have Been Flagged by Someone Else selection on the More Choices tab as the Criteria. See "Create a Custom Search Folder" later in this hour for help in creating a custom Search Folder.

Existing flags can be converted to Quick Flags by using rules to flag messages and then choosing the Run Rules Now option in Tools, Rules and Alerts.

The flags can be changed for several messages at once by selecting a group of messages and clicking in the Quick Flag box to apply a flag to all the selected messages.

Flags, Rules, and Reminder Spamming

Quick Flags can be set using rules and alerts. By doing this, important messages are flagged for you as they arrive in your inbox.

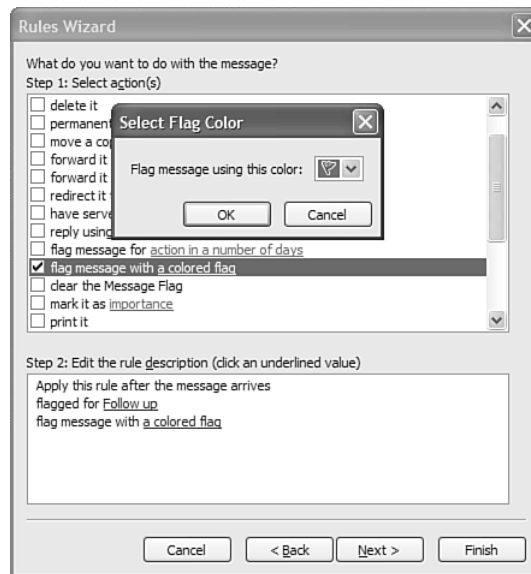
If you upgraded from a previous version of Outlook and are using rules to flag messages, you must update the rules to use Quick Flags because old rules use the old flags.

1. Open Tools, Rules and Alerts.
2. Choose Start Creating a Rule from a Template, select the Flag Messages from Someone with a Colored Flag template, and then choose Next.

3. Remove the check from People or Distribution List and add one to Flagged for Action. If you want the rule to apply the same color flag to all flagged messages you receive, click on Action and choose Any. Otherwise, choose an action to use.
- 4 On the next screen, select the action. For this rule, we want to flag messages with colored flags. Click on a color flag in the rule description field and choose a flag color (see Figure 9.2).

FIGURE 9.2

Use the Rules Wizard to change the flags on incoming messages to colored flags.



5. Add exceptions to the rule, if needed. Choose Next if you want to run the rule on messages already in your mailbox, or click Finish to save the rule and exit the wizard.

In the Rules Wizard example shown in Figure 9.2, I'm changing the flag on all incoming messages that are flagged for Follow Up by the sender to the purple flag.

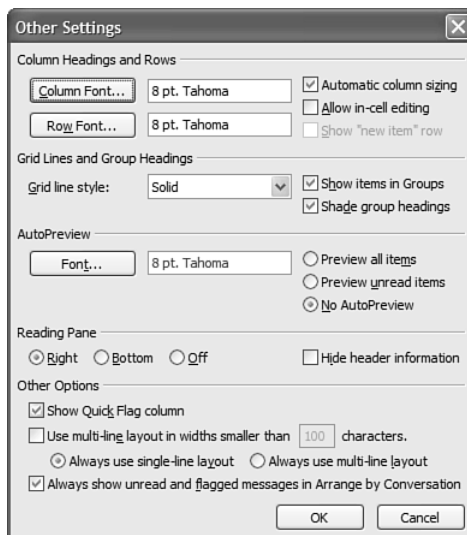
In addition, you can use rules to add flags to any messages based on the conditions you specify. For example, you might want to flag all messages from some people with purple flags and messages with certain words in the subject with a blue flag.

Flags and Views

Quick Flags are always displayed on the right side of the list view, as shown previously in Figure 9.1. The Quick Flag column is always docked on the right and can't be moved to the more familiar left side unless you uncheck Show Quick Flags Column in View, Arrange By, Custom, Other Settings (see Figure 9.3).

FIGURE 9.3

Enable or disable the Quick Flag field from the Other Settings dialog.



When the Quick Flag column isn't used, you can move the Flag Status column to another position. The flags display in this column as colored flags on a white background, whereas the Quick Flag column uses a background color that matches the flag color.

When you disable Show Quick Flags, you can still set Quick Flags and use Search Folders or other views to display the flags by color.



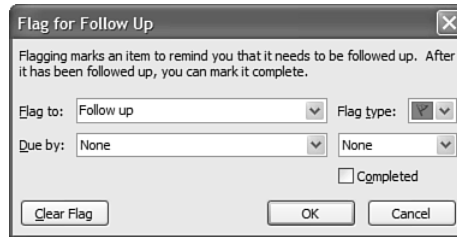
Quick Flags are supported on POP3, IMAP, and Exchange Server accounts, as well in all personal folder stores (PSTs), but not on HTTP accounts (Hotmail and MSN). You'll have to move these messages to your Personal Folders if you want to use flags.

When the Quick Flag column isn't shown in your folder view, you can flag messages with any color flag by right-clicking the message, choosing Follow Up, and then selecting a flag color or Add Reminder to set a reminder and choose the flag color. If you added the Flag Status field to your view and enable in-cell editing, you can select flag colors by clicking in the Flag Status cell and selecting a flag from the drop-down list.

When you're working in an opened message, choose the Flag icon on the toolbar to bring up the Flag for Follow Up dialog (see Figure 9.4).

FIGURE 9.4

Set reminders and choose flag actions and colors using the Flag for Follow Up dialog. If you need a different flag action, type it in the Flag To field. The field accepts up to 256 characters and displays it in the InfoBar.



The date and time fields in the Flag for Follow Up dialog accept natural language and shortcuts. You can enter holiday names or shortcuts such as 2 weeks or even 2w and Outlook will convert them to the correct date format for you. Enter a time as 115p or 1.15p and Outlook will convert it to the correct time format.

Task: Create a Quick Flag Toolbar

▼ TASK

Adding Quick Flags to messages is easy when you're using the default flag color: just click on the flag field in the mail list. When you want to use one of the other flag colors, you must right-click the item, select Follow Up, and then the flag color. It's enough extra steps for most people to use the default flag for everything.

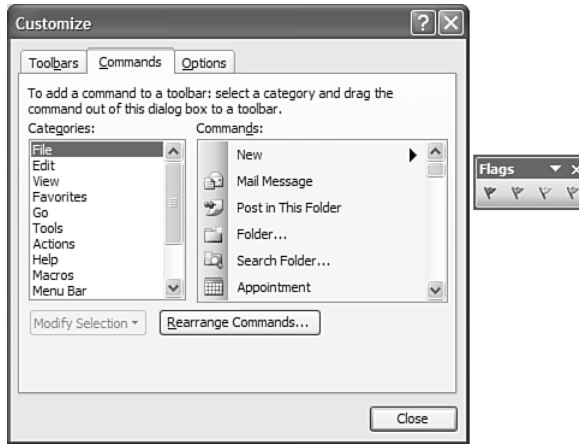
By taking the time to choose flag colors for your messages, you can use colored flags to categorize your messages. Red flags might be used for urgent messages, whereas yellow flags are used for messages you need information from later. The next problem is how to remember what each color means.

Sue Mosher, from slipstick.com, had a wonderful idea that makes using different color Quick Flags easier: create a custom Quick Flag toolbar. The flags are in full view at all times and you can name each flag for its purpose. Remembering that blue flags are used for personal messages and purple marks messages from clients is much easier when the flag is labeled Personal or Clients.

1. Open the Customize Toolbar dialog using Tools, Customize.
2. Select the Toolbars tab, click the New button, and name your toolbar.
3. Select the Commands tab (see Figure 9.5), choose Actions from the Categories list, and then scroll the Commands list to find the flags.

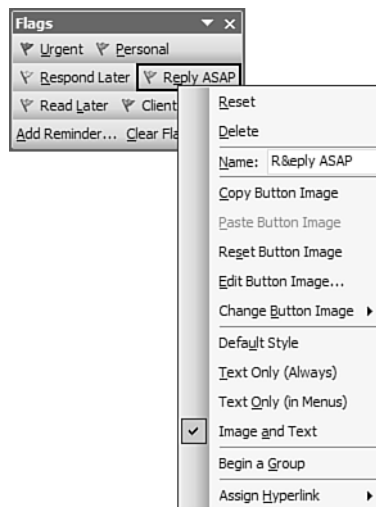


▼ **FIGURE 9.5**
Add the Flag commands to a new toolbar so that you can easily select new flag colors.



4. Drag each flag color and the Clear Flag and Add Reminder commands to the new toolbar. You don't need to add Flag Complete because one click on the flag sets the flag as completed.
5. Right-click on the command button and choose Image and Text to display the flag icon and name on the button.
6. Right-click each flag again and change the name to something meaningful, such as Urgent, ASAP, Personal, Read Later, and so forth. If you want to use a keyboard shortcut to add the flags, insert an ampersand (&) before the letter you want to use as an Alt+ keyboard shortcut (see Figure 9.6).

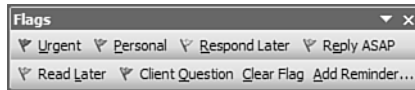
FIGURE 9.6
Customize the flag commands by using names that help you remember the types of messages indicated by the flags.



- ▼ 7. Close the Customize dialog when you're finished and drag your new toolbar to dock with the other toolbars or leave it floating (see Figure 9.7).

FIGURE 9.7

A Quick Flags toolbar makes it easier to apply different flag colors to your items and reminds you what the colors represent.



- ▲ When you're ready to quick flag a message, select it and choose one of the flag buttons. If you need to flag several messages with the same flag color, hold Ctrl or Shift as you make your selections.

Using Search Folders

Another new and cool feature in Outlook 2003 is Search Folders. These are virtual views of your message store, using the same filtering capabilities as Advanced Find and Views. Because these are virtual folders, the messages you see in Search Folders are not duplicates of the originals; they're pointers to the original. If you mark a message in a search folder as read, flag the message, or delete it, the message in your Inbox will reflect what you did in the search folder.

Outlook creates three Search Folders for you:

- For Follow Up—Searches all folders for flagged messages; the default folder view groups the messages by flag color.
- Large Mail—Groups all messages in your mailbox by size. Use this Search Folder to help you find messages with attachments.
- Unread Mail—Shows all unread messages in your mailbox. Use rules to file messages in folders as they arrive and read them from this folder

The criteria used for the default For Follow Up and Unread Mail folders cannot be changed, but you can change the folders that are searched. The criteria for the Large Mail folder, Show Mail Greater Than:, defaults to 100KB and is configurable. Right-click on the Search Folder and choose Customize This Search Folder.

Use the By Follow Up Search Folder to show all of your flagged mail items at a glance, with the messages grouped by flag color. Collapsed groups include a message count so that you know how many messages are in each group. You can create custom Search Folders or custom views to restrict the flag colors shown.

Use the Large Mail Search Folder to help you keep your mailbox size under control. Because it groups messages by size, Huge (1–5MB); Very Large (500KB–1MB), and Large (100–500KB), you can easily find messages with large attachments and remove the attachment.

The final Search Folder, Unread Mail, was often requested. As new mail arrives, you only need to check the Unread folder to read the messages, not all the folders that rules move messages to. As you mark messages read and refresh the view, the pointers to the messages marked as read are removed from the Unread view. You can use F5 to refresh it while reading messages.

Task: Create a Custom Search Folder

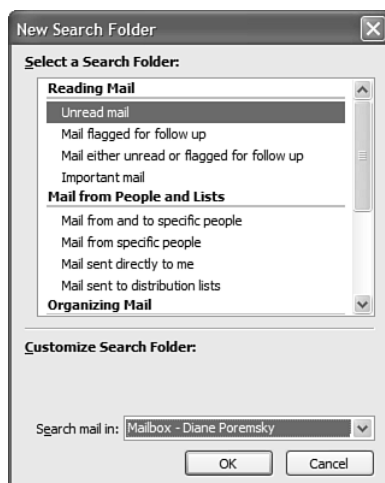
▼ TASK

One of the reasons search folders are so great is because you can create your own search folders by using the same criteria you use in custom views or with Advanced Find. You won't need to use Advanced Find to find messages in other folders and the search results are always available and current.

1. Right-click on the Search Folders header in the Navigation Pane and choose New Search Folder. The New Search Folder dialog opens, as shown in Figure 9.8.

FIGURE 9.8

Although the New Search Folder dialog contains some simple predefined searches, you can also create powerful custom searches.



2. Because a Search Folder is limited to searching one mailbox or personal store, you'll need to select the message store to search in if you have more than one message store in your profile.



- ▼ 3. Select one of the predefined searches or scroll to the bottom of the list to Create a custom Search Folder. For this task, we're going to choose Create a Custom Search Folder.
4. Select **C**hoose to open the Custom Search Folder dialog (see Figure 9.9).
5. Type a **N**ame for your folder; let's use *Last 3 days* as the name of our Search Folder.

FIGURE 9.9

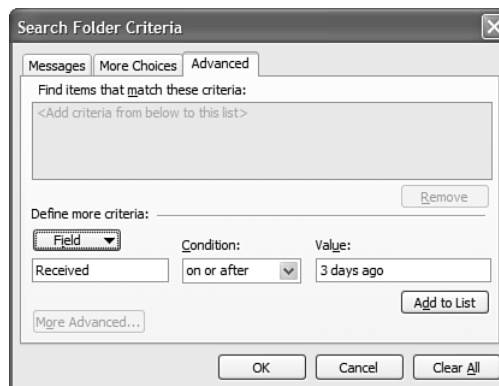
Use the Custom Search Folder dialog to create your filters and select the folder to search.



6. To limit the search to specific folders in your message store, click **B**rowse and select the folders you want searched. Skip this step to search all the mail folders.
7. Select **C**riteria and the Search Folder Criteria dialog opens. The dialog and options are identical to the filter used for views and Advanced Find.
8. Enter the criteria for the search. We're going to use the Advanced tab for this search. Choose **F**ield and select Date/Time fields, Received. As the **C**ondition, choose On or After, and type **3 days ago** in the Value field. Then choose **A**dd to List (see Figure 9.10).

FIGURE 9.10

The Search Folder Criteria dialog includes commonly used criteria on the Messages and More Choices tabs. Using the Advanced tab to create your own searches enables you to create more powerful searches.



9. Click OK on all open dialogs and then select your new Search Folder in the Navigation Pane. If your message store is large, it might take a few minutes for the search to complete. However, once it does finish, all messages that meet your criteria will be listed in the folder.



If you need to make changes to your search, right-click the Search Folder and choose Customize This Search Folder. This opens the Customize dialog you read about in step 6.

That's all there is to it; your Search Folder is ready to use. If you use saved Advanced Find in older versions of Outlook, you'll probably want to convert your advanced searches to Search Folders.

You can add your Search Folder to your Favorite Folders list so that you don't have to look for it when you want to use it.

Using Favorite Folders

Favorite Folders are new to Outlook 2003, replacing the folder shortcuts found on the Outlook bar in older versions. When you view your mail folders using the Mail button at the bottom of the Navigation bar, you'll notice the Favorite Folders group at the top of the screen.

By default, there are four folders already in your Favorite Folders:

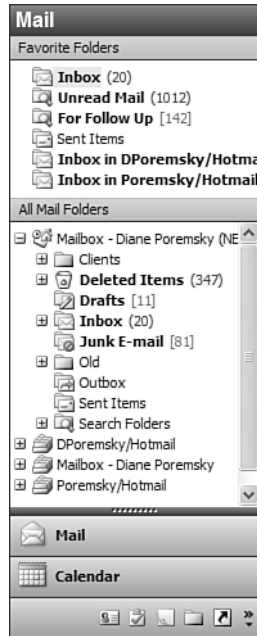
- Inbox
- Unread Mail Search Folder
- For Follow Up Search Folder
- Sent Items Search Folder

Each IMAP or HTTP (Hotmail) Inbox in your profile is added to your Favorite Folders by default. Inboxes for your POP3 accounts aren't listed because they share the Personal Folders Inbox folder.

These default folders can be deleted from the Favorites list and you can add your other favorite folders to it (see Figure 9.11). For practical reasons, you don't want to put too many folders on the Favorite Folders list; doing so makes it harder to find the folders you're looking for. Any folder that is visible in the All Mail Folders list, including Search Folders, can be added to the Favorite Folders list, the other Outlook folder types are not supported.

FIGURE 9.11

Hotmail and IMAP inboxes are included in the Favorite Folders list by default. As you add your own favorites, the Favorite Folders list expands.



The number of favorites in the Favorite Folder group determines the height of the Favorite Folders and All E-mail Folders groups. Once Favorite Folders expands to about two-thirds of the height of the Navigation bar, it begins to scroll. Your monitor resolution and the number of toolbars you display in Outlook control how many Favorite Folders you can see on screen before it begins scrolling.



If you need more space for folder shortcuts, try Shortcuts on the Navigation Pane. You can mix types of folders and shortcuts and use the entire height of your Navigation Pane for shortcuts, reducing the need to scroll.

Managing Favorite Folders

Outlook creates some Favorite Folders for you, but you might have additional folders that you want to use as favorites and you'll need to add those to Favorite Folders yourself.

Select the folder you want added as a favorite from the All Mail Folders portion of the Navigation Pane, left-click, and then drag it to Favorite Folders. Drop it when the cursor includes a plus (+) sign.

You can also select a folder, right-click, and choose Add to Favorite Folders from the context menu that appears.

You can also remove the default folders that Outlook created in the Favorite Folders list: select the folder, right-click, and then choose Remove from Favorite Folders. Don't choose Delate unless you want to delete the folder from your message store.



The list of Favorite Folders is stored in an XML file located at C:\Documents and Settings\username\Application Data\Microsoft\Outlook. Each profile has its own XML, which is named for the profile. You can delete the file to reset the Favorite Folders and the Shortcuts lists to their defaults; Outlook creates a new one the next time it runs. Interestingly enough, Outlook creates the XML file when it closes, not when it opens or as you add folders to the list, as it does for many other files it uses.

Outlook also uses the command-line switch `/resetnavpane` to reset the Navigation Pane. This switch has the same effect as deleting the XML file, and resets the buttons to their default positions. It removes any Shortcuts you added.

To start Outlook using the command line, from the Start Menu, Run dialog, enter `OUTLOOK.EXE /resetnavpane` or `"C:\Program Files\Microsoft Office\OFFICE11\OUTLOOK.EXE " /resetnavpane` and click OK.



More information about starting Outlook using the command line is in Appendix B, "Outlook's Command-Line Switches."

You can remove all the items from the Favorite Folders group, but you cannot remove the Favorite Folders group from the interface.



Although Favorite Folders are for Mail folders only, Exchange Server users can put Public Folders in the Favorite Folders, provided they're already in the Public Folder Favorites and are Mail and Post folders. You can also add secondary Exchange Server mailboxes to Favorite Folders if they're included in your profile. Secondary mailboxes aren't added to Favorite Folders automatically, as Hotmail or IMAP Inboxes are—you must create the shortcut yourself.

Organizing Favorite Folders

When you drag a folder to Favorite Folders, you can drop it in any position on the folder list. As you drag it over the favorites already in the list, you'll see a dark blue line that indicates the position of the folder at that time. When you select a folder, right-click, and then choose **A**dd to Favorite Folders, the folder shortcut is always added at the bottom of the list.

Existing folders can be rearranged by selecting them and either dragging to a new position or using the right-click menu and choosing **M**ove Up in List or **M**ove Down in List.



Included in the menu options when you right-click on a favorite are **R**ename and **D**elete. These actions apply to the folder the favorite points to, not just to the shortcut in the Favorite Folders list. If you rename the folder in Favorite Folders, the folder in your message store is also renamed. Likewise, if you choose **D**elete, the source folder and all of its contents are deleted. Use **R**emove **f**rom Favorite Folders when you want to remove the folder from the Favorites list, not **D**elete.

Managing Folders

Even with the message management benefits offered by Quick Flags and Search Folders, you'll still use folders to organize your messages.

You might end up using more folders because it's so easy to find your messages with Search Folders. The Unread mail folder is especially handy—you can create rules to file your messages as they arrive and use a Search Folder to view them in one folder. The end result is your messages are neatly filed away and you don't have to browse your folders looking for new mail.

Adding a New Folder

Outlook includes just one folder for each item type when it creates a message store for a profile, along with Outbox, Sent Items, Deleted Items, and Drafts folders.

Although there's nothing wrong with keeping all your mail in your Inbox folder, most people create some folders for filing messages as they're finished reading them. A good filing system makes it easier to find the messages you need when you need them. Even with a bad filing system, Outlook 2003 helps you find your messages.



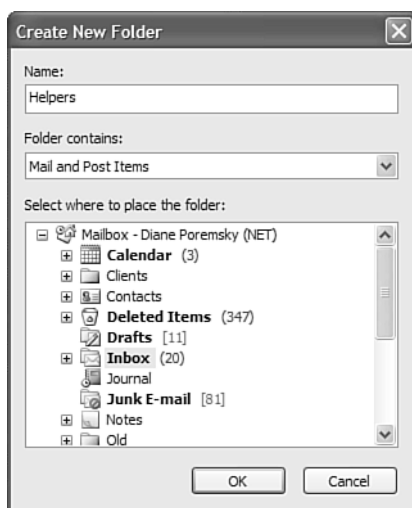
Don't use the Deleted Items folder as a filing folder. You don't file papers you need in a trashcan, so why would you store email you want to keep in the Deleted Items folder? Outlook 2003 supports more than 65,000 folders with 65,000 messages per folder—why not use a few?

Before adding new folders, plan your filing system. After you have a system in mind, it's time to create some folders.

1. Select any folder in your message store.
2. Right-click and choose New Folder.
3. Type a name for the folder.
4. Select the type of Outlook item you're going to store in the folder from the Folder Contains drop-down list.
5. Select where to place the folder. You can place any folder type in any folder (see Figure 9.12). Select Mailbox or Personal Folders to add a new folder at the same level as the default Outlook folders.

FIGURE 9.12

Use the Create New Folder dialog to add more folders to Outlook. You can create new folders in any folder. For example, you can create a Calendar folder in your Inbox folder.



Deleting Folders

The default folders that are in your mailbox when you first use Outlook cannot be deleted. However, you can delete any folder you create. Right-click on the folder and choose Delete “[folder]”, where [folder] is the name of your folder. You'll have to

respond to a dialog asking whether you really want to delete the folder and all of its contents. If you say Yes and then change your mind, you can still recover the folder provided that you haven't emptied the Deleted Items folder. Just select the deleted folder from within the Deleted Items folder and drag it back to its original location. But after you empty the Deleted Items folder, you cannot recover deleted items (except Exchange Server users under limited circumstances).

In addition to using the right-click menu, there are additional ways to delete folders:

- Select and drag the folder to the Deleted Items folder. You won't get the warning dialog reminding you that all the folder contents will be deleted.
- Select the folder and press the Delete key or Ctrl+D. You'll get the warning dialog when you use the keyboard.

To delete the folder and bypass the deleted folder, hold the Shift key when you delete. When a folder or item is deleted this way, it's gone for good. Fortunately, Outlook warns you before it deletes the folder and you can change your mind.



When the Deleted Items folder is emptied or if you hold the Shift key when deleting, the deleted items can't be recovered. If you don't have a backup, you're out of luck and the items can't be recovered.

Exchange Server mailboxes can be configured to use Deleted Items Recovery, in which case deleted items can be restored. If you connect to Exchange Server, look for **Tools, Recover Deleted Items**. If you don't see it or it doesn't contain any items, speak to your Exchange administrator.

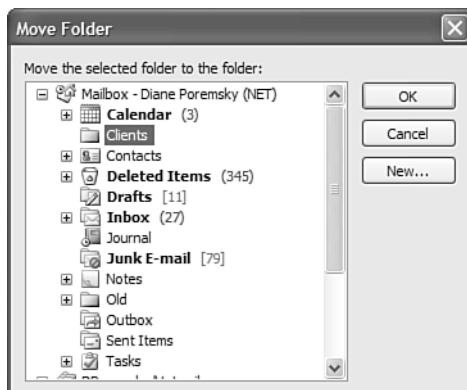
Moving Your Folders

After adding a folder, you might decide that you'd rather have it somewhere else in the folder tree. When you're moving a folder around your message store and have only a few folders, the easiest way to move it is to select and drag and drop, especially if you're using the Folder list in the Navigation bar.

When you're moving folders between message stores or have a lot of folders, right-click on the folder and choose **M**ove Folder. The Move Folder selection dialog opens, enabling you to pick the folder or message store you want to move the folder to (see Figure 9.13).

FIGURE 9.13

Use the Move folder dialog to move folders and folder contents.



It usually takes only a few seconds to move a folder. However, if there are a lot of items in the folder, it could take several minutes, especially on a slow machine.

Copy Folder, also found on the right-click menu, works like Move Folder but creates a copy of the folder and folder contents, instead of moving it.

Copy Folder Design

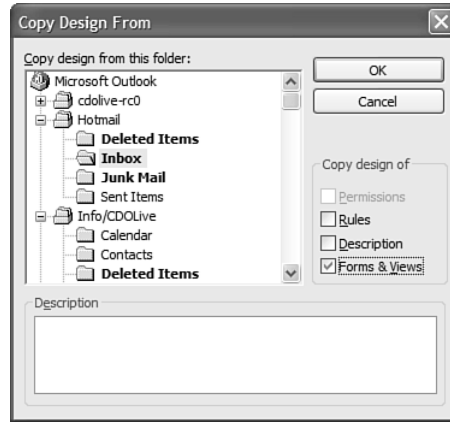
A common complaint by many Outlook users is the inability to share custom views. Although this is true for Internet mail users, Exchange users can copy their views to a PST and share it with other Exchange users.

1. Select the folder that you want to copy another folder's designs to.
2. Choose File, Folder, Copy Folder Design to open the Copy Design From dialog (see Figure 9.14).
3. Select the folder to copy the design from and select the elements you want to copy, choosing from Permissions, Rules, Description, and Forms & Views.

Not all elements will be available for copying. Forms & Views is the important selection because it enables you to move custom views and forms published to specific folders between folders and message stores.

FIGURE 9.14

Use Copy Folder Design to copy views and forms to new folders after using Import and Export.



Summary

This hour introduced you to the new email management features in Outlook: Favorite Folders, Search Folders, and Quick Flags. Included were some ideas on how to make the most of these features, such as creating a Quick Flag toolbar to make it easier to apply flags. Custom Search Folders can filter on any field available in Outlook, giving you the opportunity to create Search Folders using complicated conditions for the search.

Q&A

Q I have three POP3 email accounts and I'd like to have Favorite Folders for the email from those accounts.

A There are several different ways you could solve your problem. Because Search Folders can be added to the Favorite Folders list, I recommend setting up a Search Folder for each account.

Follow the steps used in “Create a Custom Search Folder,” earlier in this hour, using the custom search option. On the Advanced tab, choose All Mail fields, Email Account from the Field drop-down list, use contains for the Condition, and enter all or part of your account name in the Value field. Your email account name is the name of the account in Tools, Email Accounts, View or Change existing email accounts and click Next. The account names are listed on the Email Accounts dialog.

Add the Search Folders to your Favorite Folders list and you can view the messages by account.

Q I set up a rule to flag messages and did something wrong and a lot of messages I didn't want flagged are flagged. Because there are so many of these messages, changing each flag individually will take days. Is there a way to remove the flags quickly?

A Create a Search Folder that contains only the flag color you want to remove from messages. If you can fine-tune the Advanced Filter tab to show only the messages that were flagged incorrectly, you can select all the messages in the Search Folder, right-click, and choose Follow Up, Clear Flag. If you can't create a filter to show only the messages that were flagged incorrectly, hold the Shift or Ctrl key as you select the messages that need the flag cleared. Right-click and choose Follow Up, Clear Flag periodically—don't wait until you have all the messages selected to clear the flags.