



Organizing E-mail and Time with Outlook

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E-mail Management: Things to Think about

- Is e-mail the best tool for this job?
- What are your departments' e-mail policies?
- Don't use e-mail for urgent communication!
- Email Life Cycle
- Use a Discussion Board, Blog, Wiki, or LMS
- Are you following email etiquette/best practices?
- Are other people using email properly?

Fairfield University E-mail

- **The Server:** Microsoft Exchange.
- **The client program for Windows:** Outlook.
 - Web Access = OWA (Outlook Web Access = www.fairfield.edu/mail)
- **Your Mailbox:**
 - Folders:
 - Calendar, Contacts, Deleted Items, Drafts, Inbox, Journal, Junk E-mail, Notes, Outbox, RSS Feeds, Sent Items, Suggested Contacts, Sync Issues, Tasks, Search Folders.
 - These items reside on the Exchange server.
 - Limitations:
 - **120mb** = Can't Send/Receive (**100mb** = Warning, Can't Receive)
 - **5mb** = Message Size
- **Mailbox Information:** All Folder Sizes
 - "Mailbox Cleanup" tool: **Tools>Mailbox Cleanup**.
 - Click on "View Mailbox Size" button.
 - Folders are measured in Kilobytes (KB). **Divide your folders by 1000** to get the Megabyte (MB) size.

- To get an individual folder size, you can “right-click” on an individual folder and choose “Properties.” Then click on the “Folder Size” button.

Basic E-mail Cleanup

- **“Mailbox Cleanup” tool: Tools>Mailbox Cleanup.**
 - Mailbox Size
 - Finding E-mails
 - AutoArchive
 - Emptying Deleted Items
 - Alternate Versions – We don’t use!
- **Deleting E-mails:**
 - Inbox, Sent Items, and Deleted Items.
 - You will have to delete items twice to delete them permanently.
 - Recovering deleted items:
 - Select “Deleted Items”, choose **Tools>Recover Deleted Items**.
 - You have **7 days** to recover Deleted Items.

Basic E-mail Management

- **Set aside Time and turn off Distractions:**
 - Make an appointment with yourself for time for e-mail management.
 - First thing in the morning, after lunch, before you leave at end of the day.
 - Requires Discipline!!
 - Turn off e-mail distractions! (**DEMONSTRATION!**)
 - Turn off the “Desktop Alert”
 1. **Tools>Options.**
 2. On the “Preferences” tab under the “E-mail” heading, choose “E-mail Options.”
 3. In the new window that appears, choose “Advanced E-mail Options.”
 4. Modify the options under the “When new items arrive in my Inbox” heading.
- **Follow the 4 D’s:**
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- **Software Tools:**
 - “Mailbox Cleanup” tool: **Tools>Mailbox Cleanup**
 - Basic Organizing
 - **Get a Snapshot of Your Day: (DEMONSTRATION!)**
 - Outlook Today (Customize it!). Click on your main “Mailbox” folder in your folder list.
 - To-Do Bar (Customize it!) **View>To-Do Bar.**
 - Upon Outlook startup, you can have Outlook open to any folder.
 - **Tools>Options.** Click on the “Other” tab. Under the “General” heading, select “Advanced Options.” Under “General Settings,” modify “Startup in this folder.”

- Mailbox Folders:
 - Right-click on the main folder and select “New Folder.”
- Personal Folders: (DEMONSTRATION!)
 - Use for archiving.
 - Relieves space in your Mailbox.
 - Folder resides on your computer.
 - Outlook 2002 and earlier = 2 gig limit, Outlook 2003 and later = **20 gig limit**.
 - It has to be backed up manually!
 - Cannot be access via OWA because it’s not in your Mailbox. You have to remote into your office computer to get access.
- Searching and Views: (DEMONSTRATION!)
 - Search
 - Search Folders
 - Sort, Manipulate Column Headings
 - **View> Arrange By**
 - Try “Conversations”
 - **View> Current view**
- Flagging for Follow Up: (DEMONSTRATION!)
 - Reminder tool for you or others that notifies the recipient of further actions that should be taken concerning item.
 - Choose the built-in options or create a custom flag.
 - Expiration for E-mails:
 - Set e-mails to expire when they are no longer relevant.
 - Create a new e-mail. On the “Message” tab, select the “Options” dialog box launcher button. Under “Delivery options,” check “Expires after” and choose a date and time.
 - The e-mail is automatically deleted from the recipient’s mailbox and it will have a strikethrough in your “Sent Items” indicating that it has expired.
- Tasks: (DEMONSTRATION!)
 - To-do items you can create for yourself or assign to others.
 - Low level project management.
 - Separate task folders for each project. (Warning: Limitations!)
 - Customize your view/fields to organize your tasks.
 - Add tasks. Update tasks.
 - Assign tasks to others.
 - Send Status Reports.
 - Share your Tasks folders. (Like sharing Calendars!)
 - Viewing/Managing your tasks.
- Automating E-mail: (DEMONSTRATION!)
 - Rules and alerts: **Tools>Rules and Alerts**
 - Flag messages from someone for follow-up and direct it to a specific folder.
 - Some rules won’t process until you open Outlook.

- Archiving: **Tools>Options.** Click on the “Other” tab and then select “AutoArchive.”
 - Cleans up your folders. Removes old and deletes expired messages.
 - Uses a .pst personal folder.
 - Be aware of the automatic process.
- Contact Management:
 - Distribution lists:
 - Grouping contacts.
 - There is no definite limit to the number of contacts that you can add to a distribution list in Outlook 2007.
 - Categories:
 - A color label that you assign to related Outlook items. It helps you manage Outlook items regardless of where they are stored. You can have an unlimited amount of categories.
 - For large distribution lists, add a category to your contacts. Then group by category and then send an e-mail to them.
- Calendar:
 - Appointments:
 - Let people know when you are free or busy.
 - Set reminders and reoccurring appointments.
 - Meeting Requests:
 - Easily coordinate and manage meetings.
 - Sharing and creating multiple calendars.

E-mail Safety Tips and Other Best Practices

- **Attachment Management:**
 - What can't be sent: Programs (.exe files), files with Macros, Database files.
 - Workaround – Zip files
 - Where to save attachments:
 - Your computer (temporarily)
 - Personal folders in Outlook
 - Xythos
 - Xythos Sharing Features
 - Links to Xythos files
 - Send links:
 - Copy and Paste web page addresses
- **Signature** – Create one and supply alternate contact information.
- **Out of Office Reply** – Include your signature and supply alternate contact information.
- **Don't send e-mails to yourself!** – (for quick reminders)
 - Use Tasks or Notes instead.
- **Junk e-mail:**
 - We filter e-mail spam for you.
 - Use rules and alerts to manage junk e-mail.
 - To use Junk e-mail tools in Outlook, “cached exchanged” mode must be used.
 - Disadvantages of Cached Exchange mode.

- **Do not send personal/confidential information over email.**
- **Use Public Folders to store e-mails.**

Other Options

- **OWA (Outlook Web Access)**
 - Access: www.fairfield.edu/mail
 - Best used with Internet Explorer
 - Firefox and Safari
 - Premium, Basic
 - Security: Public, Private
 - Limitations:
 - Can't create Archive or Personal Folders or access them
 - Search folders may not show
 - Can't see size of folders, only individual e-mail size
 - Ability to create Rules is only available if using Internet Explorer
 - Other browsers don't show all the options
- **Mobile Devices:** Blackberries or iPhones
- **Login to office computer remotely.**
- If using a laptop, use the "Network Connect" feature of **VPN** to use Outlook.

Resources

- Web: **office.microsoft.com** or **<http://office.microsoft.com/training>**
 - Select the "Help and How-to" tab and then select "2007 Office System." Select "Outlook 2007."
 - <http://office.microsoft.com/en-us/training/HA102188671033.aspx>