Managing Your Mail with Outlook Exchange
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Managing Your Mail

One of the challenges in using email on a daily basis is managing the volume of the mail that you receive and organizing it so that you can find and process things quickly and effectively. Outlook provides many tools for this. Using even a few of them will save you hours of time spent searching for lost messages and frantically trying to clean out folders when you receive that mailbox full message. Perhaps best of all, if you take the time to set up and then consistently use these tools, you will significantly reduce stress and frustration in your daily workday!

**Checking Folder Size**

It's a good idea to periodically check your folder sizes, so you can take action on cleaning up and filing mail before you receive the dreaded "Your mail box has exceeded its size limits" message.

1. Click your right mouse button on your Mailbox name in the Folder List and choose Properties from the pop-up menu.
2. The Folder Properties box is displayed.
3. Click the Folder Size button.
4. A list of all of your server folders is displayed along with the current size of each. The total size of your mailbox is displayed above this list.

**Finding Messages**

You can locate messages in a folder by using Outlook's Find feature. In our example, we will be using the Inbox folder, but you can use this feature in other folders as well.
To turn on the Find toolbar, click the Find button on the Standard toolbar.

The Find toolbar is displayed at the top of the Inbox list.

Complete the Look for: box and select the Search In option.

Click Find Now to perform the search.

If you need to do a more complex search, click Options on the Find toolbar and choose Advanced Find. The Advanced Find dialog box is displayed. There are many options to choose from in this dialog box to build a detailed search.

Organizing Your Mail with Search Folders

If you frequently find yourself using the Find feature to locate mail with the same criteria, I'm sure you are wondering if there is a way to avoid recreating the criteria each time you need it. If you are moving mail into separate folders that you have created on the server as a way to file and find things, you may notice that the more folders you create, the more cumbersome your folder list is to work with. Using Outlook's Search Folders feature offers a solution for both of these situations.

Search folders are easy to set up and use. They work by saving search criteria for finding items rather than filing items in a separate folder. The search criteria can be applied to a single folder, or across all folders in your Exchange account.

The Search folder appears as a folder icon in your folder list. When you open the Search folder, it displays shortcuts to all of the items that meet the criteria for that folder. If the search was done across multiple folders, Outlook identifies the folder location of each item in the list.
Creating a Search Folder

You can either create a Search Folder directly from the Folder List in the Navigation Pane, or by using the Find feature and saving the find criteria as a Search Folder.

To create a Search Folder directly from the Folder List:

Click your right mouse button on Search Folders in the Folder List.

From the pop-up menu, choose New Search Folder. The New Search Folder dialog box is displayed.
In the New Search Folder dialog box, you may choose one of the listed criteria, or you may create your own custom criteria.

To create custom criteria:
Scroll down the list until you see Custom.
Click on Create a custom Search Folder.
Click the Choose Button.
The Custom Search Folder dialog box is displayed.

Type a name for your Search Folder into the Name: box.
Click the Criteria button.
The Search Folder Criteria dialog box is displayed.
Choose the criteria that you wish to use for the Search Folder.

Click **OK** to set the criteria.

You are returned to the **Custom Search Folder** dialog box.

The default for a Search Folder is that it will search your entire Exchange account (all server-side folders). If you want to limit the search to specific folders, click the **Browse** button next to **Mail from these folders will be included in the Search Folder**.
Click on the checkboxes for the folders you want to search. Be sure to uncheck Mailbox at the top of the list.

Click OK to complete the folder selection.

The folders you have selected will be listed under Mail from these folders will be included in the Search Folder.

Click OK to create the folder.

Using Rules to Manage Mail

A message rule is a set of conditions and actions. If an incoming message meets the conditions in the rule, the specified actions are taken. Using Rules to handle mail can save you filing and mailbox cleanup time, as well as automate replies and forwards.

Tip: The Outlook Out-of-Office Assistant, is a good example of a message rule. When the rule is in effect, an automatic response is sent to anyone who sends you a message. That rule can be customized by you to forward certain types of mail to a co-worker while you are out of the office.

Rule actions can include organizing messages, filing messages into folders, flagging messages, deleting messages, respond to a message with a prescribed reply, forward or
redirect messages, etc. Outlook provides you with a Rules Wizard to help you build effective rules.

To create a rule:

Choose *Tools, Rules and Alerts* from the pull down menu at the top of your screen.

The **Rules and Alerts** dialog box is displayed.

*Click the New Rule button.*

Be sure that **Start creating a rule from a template** is selected

*In Step 1, choose the type of action you would like to use for the rule (you will get a chance to detail this further in a later step of the Wizard).*

*In Step 2, click the blue links to supply the conditions for the rule and the detail for the action to be taken.*

*Click the **Next** button to continue.*
In the next dialog box, under **Step 1**, you may supply more detailed conditions if you wish. If the conditions you select require more information, additional blue links will appear in **Step 2** for you to complete.

*Click the **Next** button to continue.*

In the next dialog box, under **Step 1**, you may supply more detailed actions if you wish. If the actions you select require more information, additional blue links will appear in **Step 2** for you to complete.

*Click the **Next** button to continue.*
In this dialog box, under **Step 1**, you may supply exceptions to the rule if you wish. If the exceptions you select require more information, additional blue links will appear in **Step 2** for you to complete.

*Click the Next button to continue.*

In the final dialog box, under **Step 1**, name your rule.

In **Step 2**, you can choose to run this rule on messages already in your Inbox (a great way to clean up an unorganized mail box quickly). You can also turn the rule on or off in **Step 2**. You may be creating a rule that you will only use at certain times, such as when you are on vacation. After the rule has been saved, you can come back to the Wizard and turn the rule on or off at will.

*Click the Finish button to complete the rule*

You are returned to the **Rules and Alerts** dialog box. You will see your rule listed, along with a check box to indicate whether the rule is currently on or off. Click **OK** to...
save the rule. You can return to the **Rules and Alerts** dialog box at any time to turn a rule on or off, or to edit the conditions and actions for the rules, by selecting **Tools, Rules and Alerts** from the pull down menu at the top of your screen.

![Rules and Alerts dialog box](image)

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**Recovering Deleted Items**

Eventually, we all delete something we wish we hadn't. As you may know, you can always go to the Deleted Items folder and move the deleted item back to an active folder. But what if you have already "taken out the trash", that is, you have emptied the Deleted Items folder? Fortunately, Outlook gives you a way to recover items (with some limitations) even if you can no longer see them in the Deleted Items folder.

For a specified amount of time (typically 30 days), you can recover those items.
1. Select the Deleted Items folder in your folder list.

2. From the pull-down menu at the top of your screen, select Tools, Recover Deleted Items.

The Recover Deleted Items From Deleted Items dialog box is displayed. You will see a list of all of the items that were emptied from the trash within the last 30 days.

3. Select items to be recovered by clicking on an individual item, by holding down the CTRL key on your keyboard while clicking on multiple items, or by using the Select All button (see below).

4. To recover the selected items, click the Recover Selected Items button. The recovered items are returned to your Deleted Items folder.

5. To permanently delete the selected items click the Purge Selected Items button. These items can no longer be recovered.

Working with Categories

You can easily organize Outlook items such as messages, contacts, tasks and meetings into groups with Outlook categories. For example, you could place all of the meetings, messages and contacts for a particular project into the same category. Categories make it easier to sort, find, file and delete these items, and you can create a custom view to quickly display items by category. When categorizing your mail, you can choose from one of Outlook's built-in categories, or you can create custom categories of your own.
Choosing and Creating Categories

6. To categorize an item, right click on the item and choose *Categories* from the pop-up menu. The *Categories* dialog box is displayed, listing all of Outlook's built-in categories.

7. Click in the check box of the category you wish to use. Note that you can designate multiple categories for the same item.

8. Click the **OK** button to set the category you have selected.

If you wish to create your own custom category, click the [Master Category List] button at the lower right of the dialog box.

1. In the **Master Category List** dialog box, type the name of your new category into the New category box and click the add button.

2. Click **OK** to return to the Categories dialog box, where you will see your new category in the list (they are organized alphabetically).

3. Click in the checkbox to select the category.

4. When you have finished, click the **OK** button to set the category you have selected.
Creating a Category View

Once you have designated categories for items, you can create a custom view for any folder that will group items in the folder by the categories you have selected. Any non-categorized items will appear in a separate, uncategorized group.

1. To set up the custom view, open the folder you wish to work with. In our example we will use the Inbox folder.

2. Choose View, Arrange By, Custom from the pull-down menu at the top of the screen. The Custom View Organizer is displayed.

3. Click the New button to create a new view.

![Custom View Organizer](image)
The **Create a New View** dialog box is displayed.

4. **Name the view Categories, select Table as the Type of view, and set Can be used on to This folder, visible to everyone.**

5. **Click **OK** to create the view.**

The **Customize View** dialog box is displayed

Next we will customize the view to display in categories.

6. **Click on the Group By button**

![Create a New View dialog box](image)

![Customize View: Categories dialog box](image)
The **Group By** dialog box is displayed.

7. **Set the Group items by to Categories.**

8. **Use Then by to further group or sort.** If you check the **Show field in view** option, it will sort on that field; if you do not set that option, it will create a sub-group.

9. **Click OK to complete the view.**

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**Displaying the Category View**

Once you have created the category view, you may choose it from the **Current View** list on the **Outlook Advanced Toolbar**

The view is displayed.
**Flagging Mail for Follow-ups**

Have you ever had this experience? You read a message and need to write a lengthy reply, but you just don't have the time right now, so you plan to come back and do it later. You want to be sure that you don't forget, so maybe you write a note and leave it on your desk, or maybe you mark the message as unread so you will know to reopen it later, or maybe you do none of these and you actually do forget about it. Outlook's flag feature can make following up on messages easy and foolproof.

**Setting a Basic Message Flag**

1. To set a basic message flag, **click the flag icon for the item you want to flag.**

<table>
<thead>
<tr>
<th>From</th>
<th>Subject</th>
<th>Received</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeanne Mnak</td>
<td>Staff Meeting</td>
<td>Mon 3/13/2006 10:41 AM</td>
<td>8 KB</td>
</tr>
<tr>
<td>Jeanne Mnak</td>
<td>Staff Conference</td>
<td>Mon 3/13/2006 10:39 AM</td>
<td>8 KB</td>
</tr>
<tr>
<td>Jeanne Mnak</td>
<td>Staff Conference in Maui</td>
<td>Mon 3/13/2006 10:32 AM</td>
<td>5 KB</td>
</tr>
<tr>
<td>Jeanne Mnak</td>
<td>New Office Policy</td>
<td>Mon 3/13/2006 10:31 AM</td>
<td>5 KB</td>
</tr>
<tr>
<td>Jeanne Mnak</td>
<td>Project Update</td>
<td>Mon 3/13/2006 10:28 AM</td>
<td>5 KB</td>
</tr>
<tr>
<td>Jeanne Mnak</td>
<td>Welcome to Tips and Tricks</td>
<td>Mon 3/13/2006 10:23 AM</td>
<td>6 KB</td>
</tr>
</tbody>
</table>

2. The flag for that item is displayed in red.

3. Once you have flagged items, you can sort them to the top of the Inbox list by **clicking the column header for the flag column.**

**Marking a Flag as Complete**

To mark a flag complete, **click on the flag icon for the flagged item.**

The flag will be replaced with a check mark.
Using the Flag Menu

Click your right mouse button on the flag icon to display the pop-up menu.

On this menu, you can

- choose a different flag color for the item
- mark the flag for the item complete
- add a reminder for the flag (see below)
- clear the flag from the item
- change the default flag color for all future flags

Setting a Reminder for a Flag

1. To create a reminder for a flag, click your right mouse button on the flag icon for the item.
2. Choose Add Reminder for the pop-up menu
3. Complete the options in the Flag for Follow Up dialog box
4. Click OK to complete the flag options.
Viewing Flag Details

Details of flags you have added are noted in a gray bar at the top of the message in the Reading Pane.

When you mark a flag as completed, the details are updated with that information as well.

Using Templates

If you frequently send messages that contain the same basic content each time, you can save time by setting up a template for the message. When you need to send the message you open a copy of the template, address the message, change any particulars and send it.

5. **Begin by creating a new message. Include in the message any text for the Subject and the body of the message that will remain constant. Do not address the message.**

1. **When you have finished, choose File, Save As from the pull-down menu at the top of your screen. Type in a name for your template, and then change the Save as type to Outlook Template.**

2. **Click Save to save the template.**

3. **To use the template, create a new message by choosing File, New, Choose Form.** The **Choose Form** dialog box is displayed.

4. **From the Look In: list, choose User Templates in File System.**
5. A list of your templates is displayed.

6. **Select the template you wish to use and click the Open button.**

You now have a copy of the template as a new message. You may address it; add, change or delete information as needed for the current message; and then send it.