



### White Paper

## Outlook 2007: Processing e-mails

31/03/2010

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*This is my take on how Microsoft® Office Outlook® 2007 (Outlook<sup>1</sup>) can be setup and used to process dozens of e-mails effectively.*

*David Allen's article*

*(<http://www.qtdiq.com/media/pdf/Getting%20Email%20under%20control.pdf>) provides the backdrop to managing e-mail with Outlook and also provides suggestions on handling larger volumes.*

*Enjoy,*  
Brad Allen

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<sup>1</sup> Microsoft and Microsoft Office Outlook are registered marks of Microsoft Corporation.



## The "Zeroing" process

Once you have Outlook setup (below), your 'zeroing' activity will generally follow these steps:

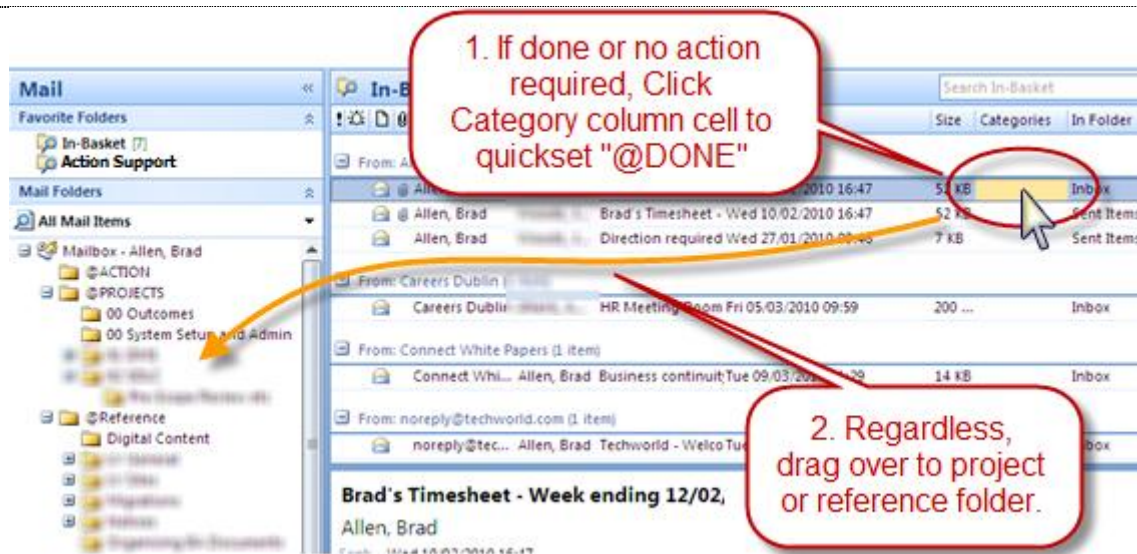
1. Start with your list manager next to you, open at the "At Computer" page (you may need to flick to other next action contexts and also Waiting For, but in the most part, I suggest your next actions will be taken "At Computer").



2. Use the GTD workflow and start working your Inbox (or "In-Basket" if you are using the "Advanced Setup").

For example:

- if the e-mail has no meaning, delete it;
- Or** if you need it for reference later, click the "Categories" column to tag as @DONE, then drag the e-mail into a reference or project folder;
- Or** if it takes less than 2 minutes to process (i.e. a quick read and simple reply), do that, tag as @DONE and then drag it to a folder or delete it;
- Or, i.e. for all e-mails that are not 'done',** write a next action in your "At Computer" list and then drag the e-mail to a folder. Note: Don't tag as @DONE so it shows up in your ACTION SUPPORT search folder.



3. After you have 'zeroed', you can now use your "At Computer" list. When you come across a next action item relating to a new e-mail you'll find it in the ACTION SUPPORT search folder. After you have finished the next action associated with the e-mail, tag is as @DONE and it will disappear from the ACTION SUPPORT search folder.



## Outlook Setup (Basic)

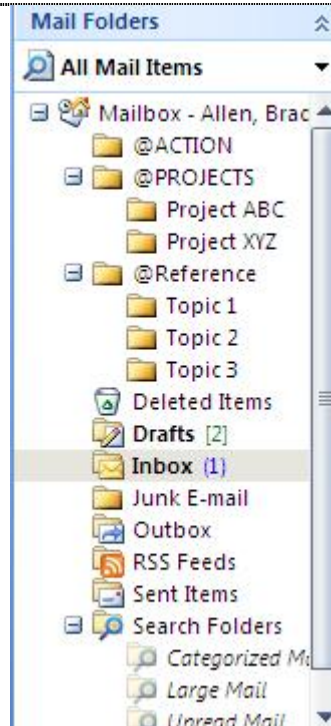
### PART A: Create your folder structure

1. In the Mail folders area, right click on 'Mailbox – name' and choose 'New Folder...'
2. Create a set of folders that represent your active projects and the start of your reference system (see image)

Note – Use “@” symbol if you want them to appear at the top of the list of folders.

You will now drag all your e-mails to these folders. Clearly anything related to a project is dragged to a sub folder of “@PROJECTS” and anything that is reference material is dragged to “@Reference”. The @ACTION folder is for items you need to think about more, i.e. you’re not sure if it is a project or not.

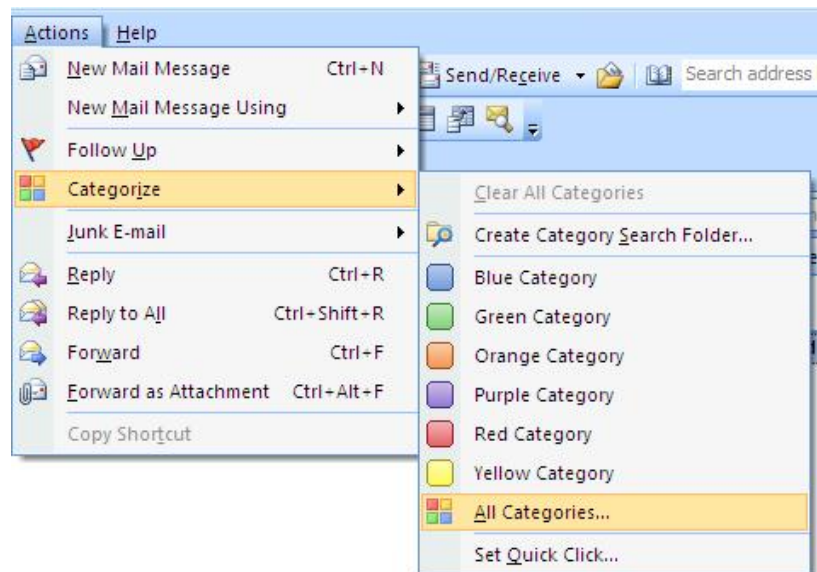
When dealing with new project items, just create the project sub folder immediately and don’t get too worried about the name as you can always rename it later.



### PART B: Configure your '@DONE' category

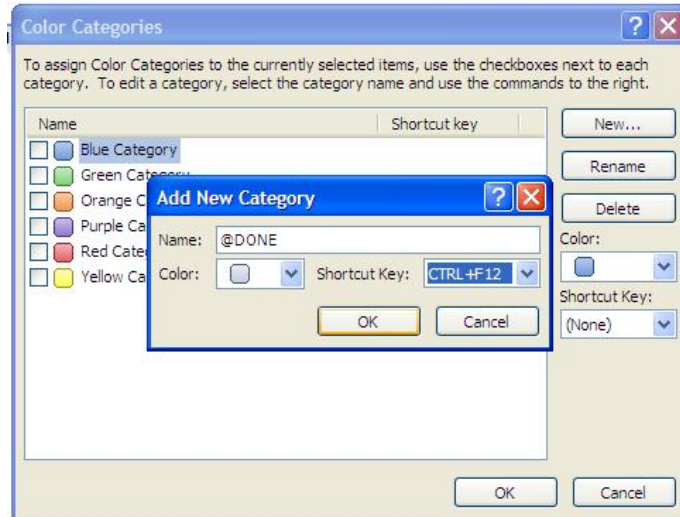
The '@DONE' category is a simple way to manage e-mails that need no further attention. This can include e-mails that you have read, forwarded or replied to, but want to keep. Anything that you don't need should be deleted.

1. In any e-mail folder, from the 'Actions' menu choose 'Categorize >', in the sub menu, choose 'All Categories...'

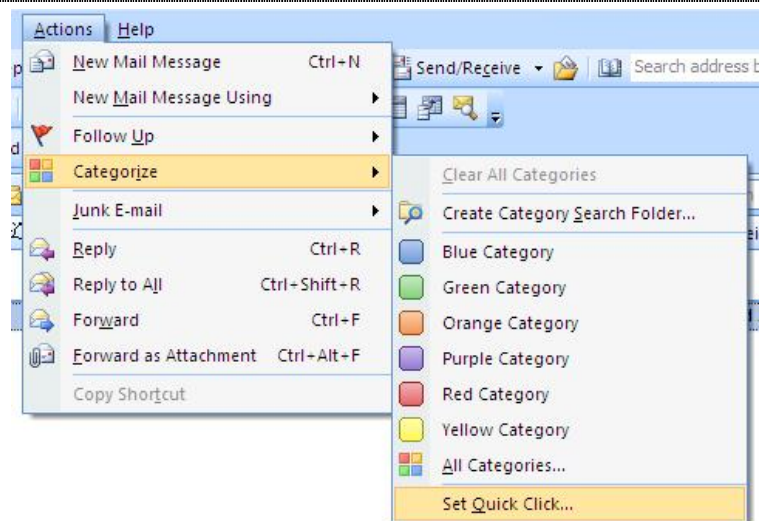




- In the Color Categories dialog, choose 'New...', and in the Add New Category Dialog, type '@DONE' (use upper case), set the Color as GREY, and the Shortcut key to something that you aren't using, i.e. CTRL-F12. Click Ok to close the Add New Category dialog and click Ok again to close the 'Color Categories' dialog.



- In any e-mail folder, from the 'Actions' menu choose 'Categorize >', in the sub menu choose 'Set Quick Click...'



- In the 'Set Quick Click' dialog, choose '@DONE' and click Ok.

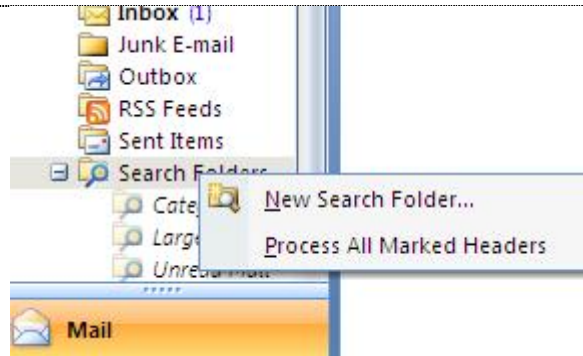




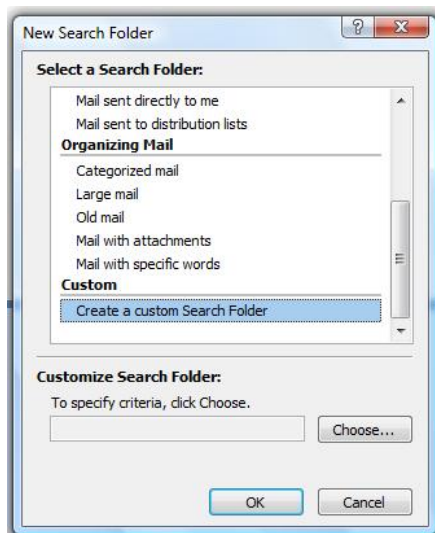
## PART C: Create your search folders

Search Folders are a clever way to see manage your e-mail across all your folders. We'll use the search folders capability to create the main work areas.

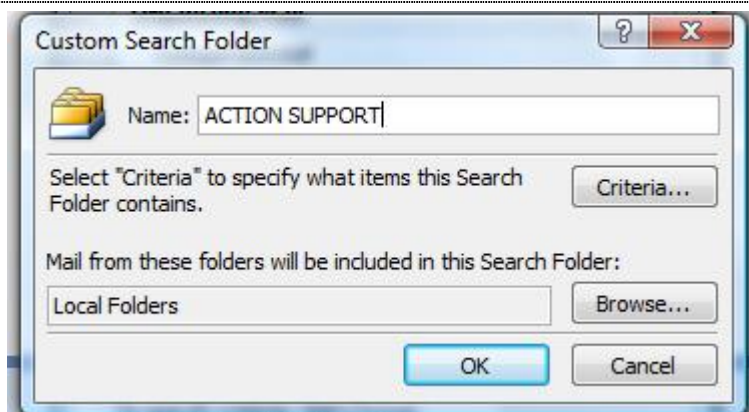
1. Right click on the "Search Folder" listing and choose "New Search Folder..."



2. In the "New Search Folder" screen, choose "Create a custom Search Folder" and click "Choose..."

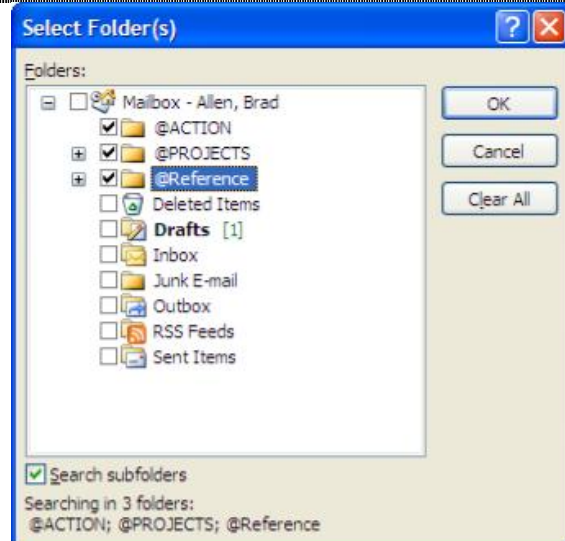


3. Give your new search folder a name of "ACTION SUPPORT", then click "Browse..." to select the folders.

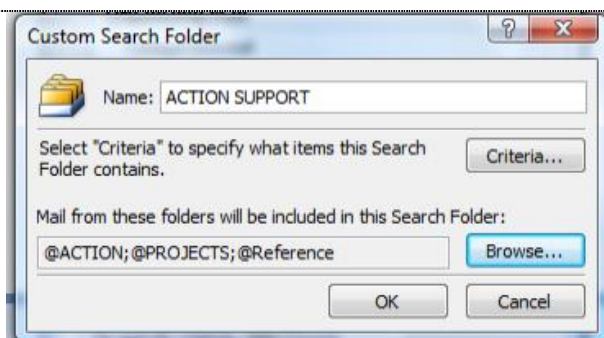




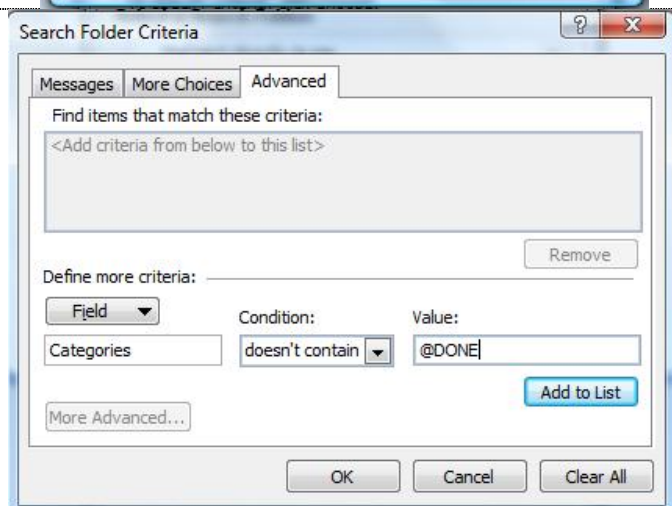
- In the "Select Folder(s)" dialog, uncheck "Mailbox -xxx", and check "@ACTIONS", "@PROJECTS" and "@Reference". Leave the checkbox on "Search subfolders".



- Click "Ok"
- Now in the "Custom Search Folder" dialog, click on "Criteria":



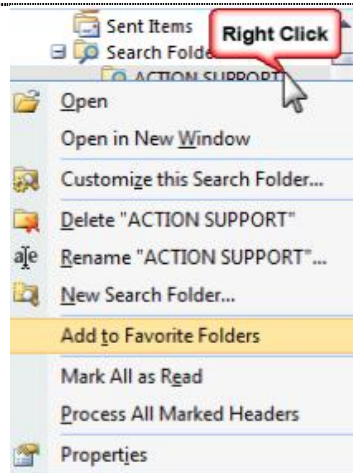
- In the Search Folder Criteria dialog, select the "Advanced" tab, then add a search criteria: Use the "Field" pulldown, expand "Frequently Used Fields" and choose "Categories"; now change the "Condition" to "doesn't contain" and then type "@DONE" in the value; now press "Add to List".



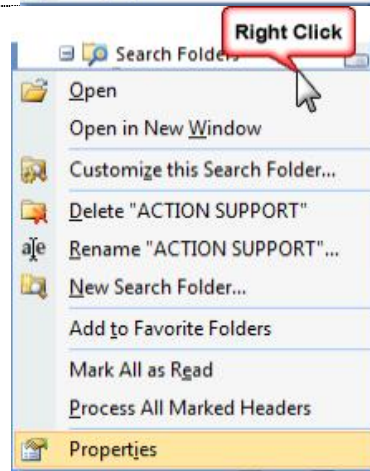
- Now click Ok three times to create your search folder.



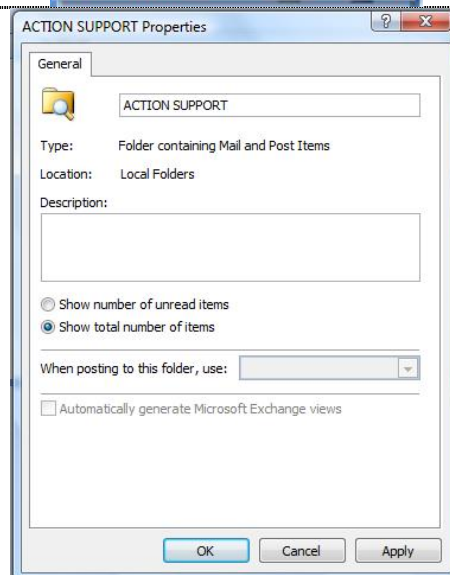
9. Finally, add your search folder to your favourites: By right-clicking on the new search folder (i.e. "ACTION SUPPORT") and choosing "Add to Favorite Folders".



10. Finally, you want to change the behavior of the message counter: Right click on the "ACTION SUPPORT" search folder again, choose properties



11. Now in the ACTION SUPPORT properties, change the option to "Show total number of items" and click Ok.

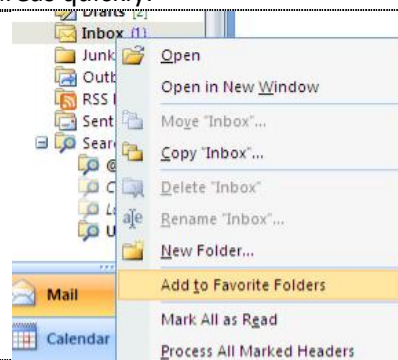




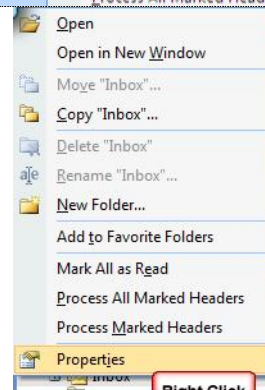
## PART D: Add your InBox to your Favourite Folders

Favourite Folders are a clever way to get in and out of your key areas quickly.

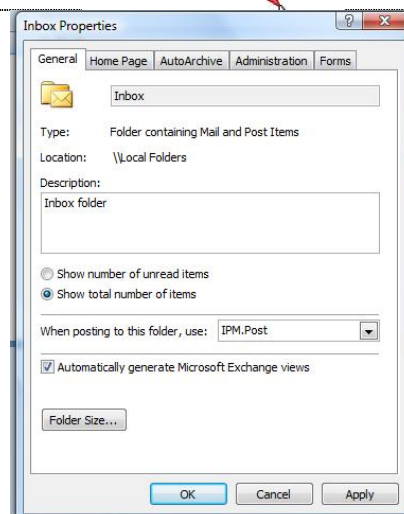
1. Right Click on your InBox and choose “Add to Favorite Folders”



2. Now Right Click on the InBox and choose Properties:



3. Now in the INBOX properties, change the option to “Show total number of items” and click Ok.



## PART E: File your existing e-mail items.

See “Getting your existing folders to “zero””.

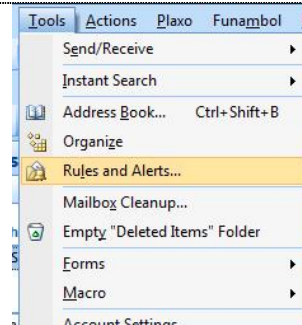


## Outlook Setup (Advanced – Option 1)

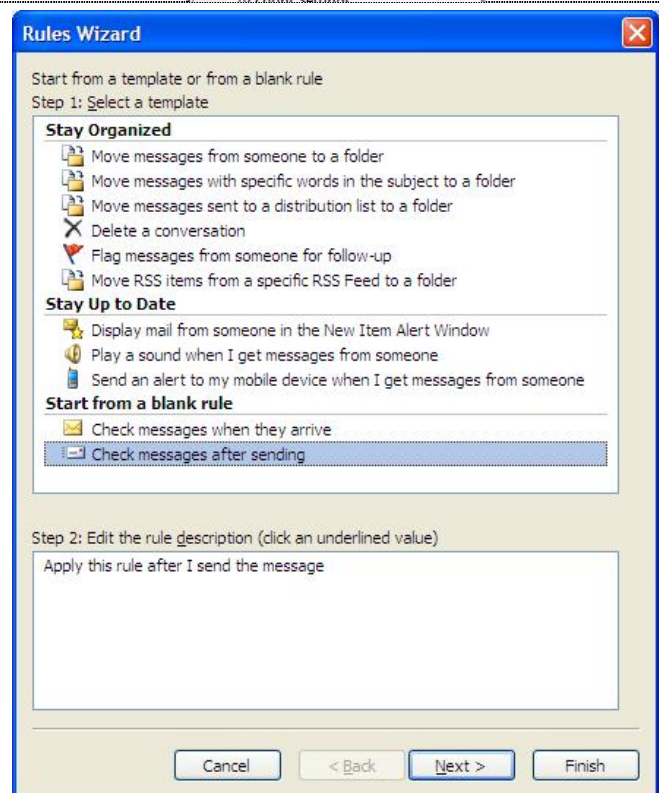
The steps below provide ideas relating to an extension to basic setup outlined above. This advanced setup is useful if you wish to file send items also.

### PART A: Create a rule to automatically flag sent items

1. In Outlook, choose 'Rules and Alerts...' from the Tools menu.



2. Select "Check messages after sending":



3. Click Next> and then again click Next> (and choose yes to process every message).



- Now define what to do: Check “assign it to a \_\_\_\_\_ category”



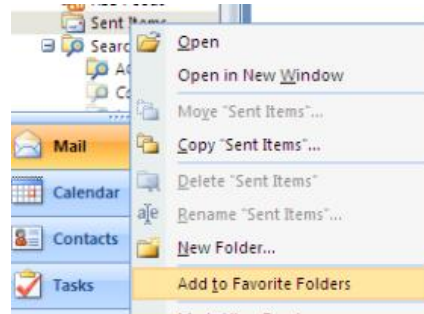
- In Step 2, click the high-lighted “category” item and choose “@DONE”.
- Click Next
- Click Next (there are no exceptions)
- Name it “Categorise Sent Items as @DONE”



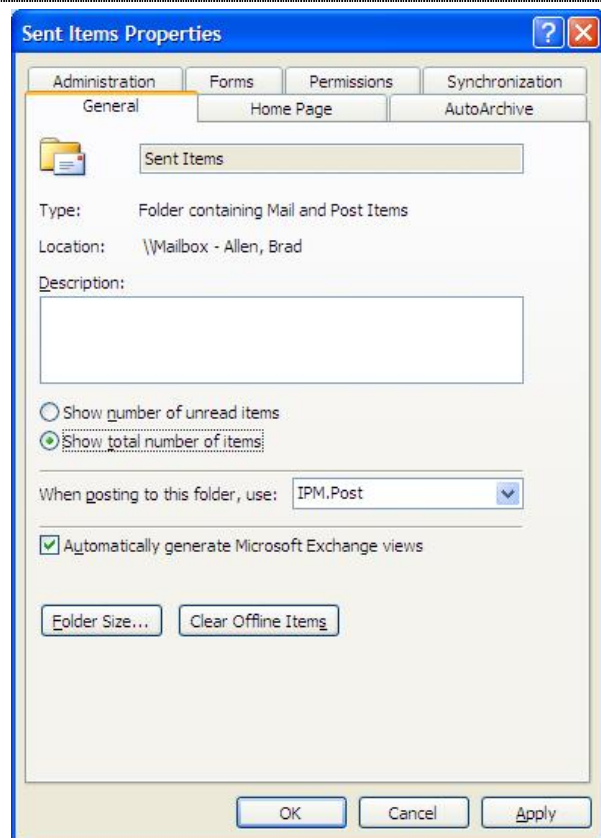


## PART B: Add your “Send Items” to your favourites.

1. Right-click on Sent Items, and choose “Add to Favorite Folders”.



2. Right Click on the Sent Items folder and choose “Show total number of items”:



## PART C: File your existing sent items.

See “Getting your existing folders to “zero””.



## Outlook Setup (Advanced – Option 2)

The steps below provide ideas relating to an extension to basic setup outlined above. This advanced setup is useful if you wish to process (i.e. file) received items and send items together and at the same time.

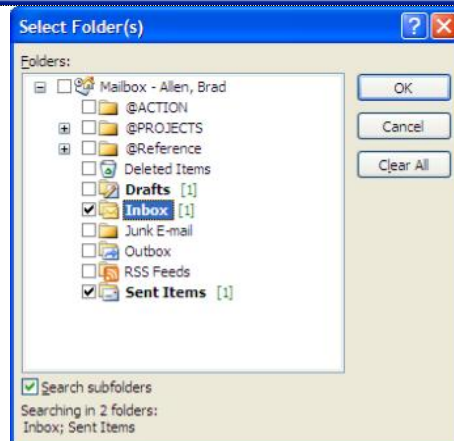
### PART A: Create a custom search folder.

1. Create a search folder (as outlined in the Basic setup), called it "In-Basket".



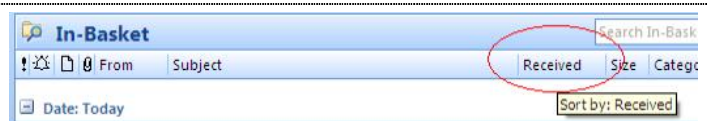
2. When configuring the folders, choose "Inbox" and "Sent Items".

Note: There are no search criteria; you just want to see everything.



### PART B: Customise the search folder so that it groups by date.

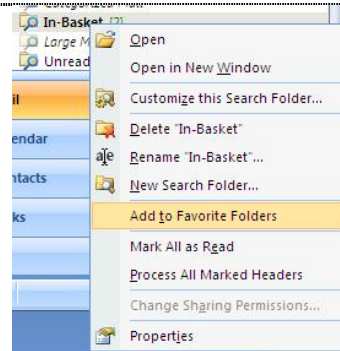
1. In the In-Basket search folder, click the "Received" column heading/title.



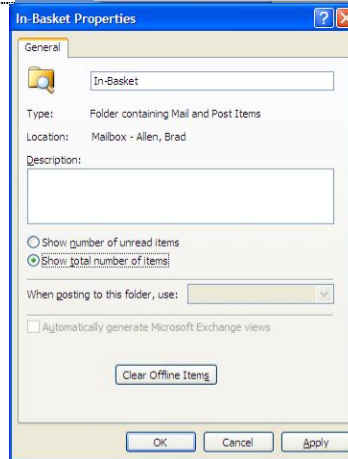


**PART C: Add the new search folder to your favourites and remove Inbox and Sent Items.**

- 1. Right-click on Sent Items, and choose “Add to Favorite Folders”.

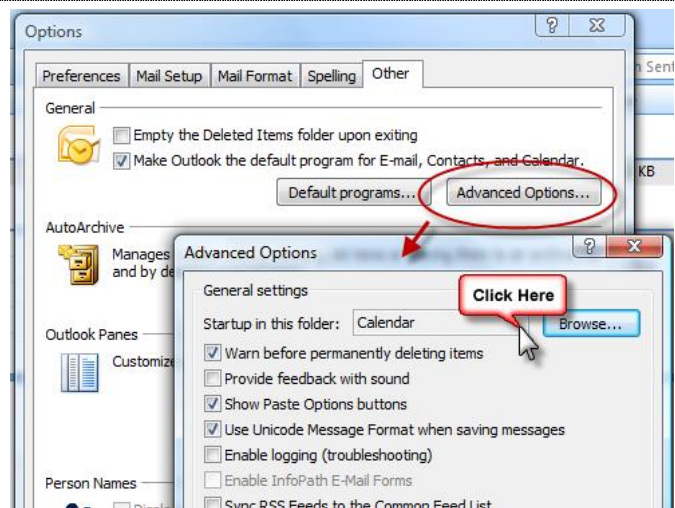


- 2. Right Click on the In-Basket folder and choose “Show total number of items”:



- 3. Now instead of using your Inbox, you use the In-Basket.

Although, best practice with Outlook is NOT to have the “Inbox” as your start-up page, i.e. it should be your calendar, if you aren’t using your calendar; you could configure it to be your new processing place. This is done by choosing “Options” from the tools menu, changing to the “Other” tab, clicking “Advanced Options” and changing the “Startup in this folder” option:





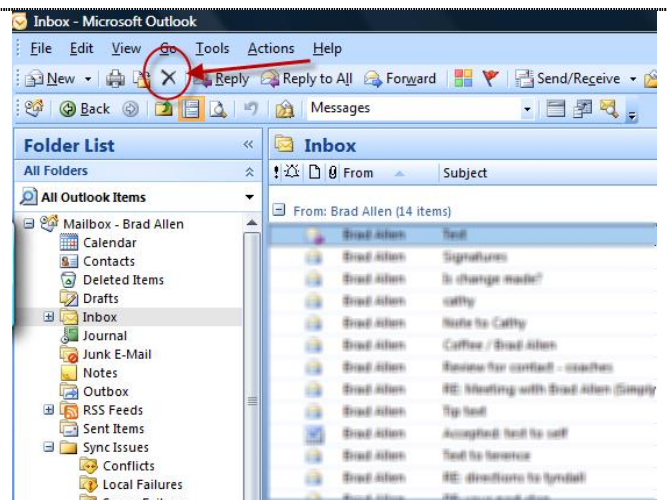
## Getting your existing folders to “zero”

Now that you system is configured, you need to get your folders to “zero”. Depending on the volume of e-mail, you might need to give this a good chunk of time and also employ a few tricks. Here is what is generally considered best practice for getting your e-mail to a manageable place.

### PART A: Cleanse your e-mail.

Before you start, you should clean out rubbish e-mails.

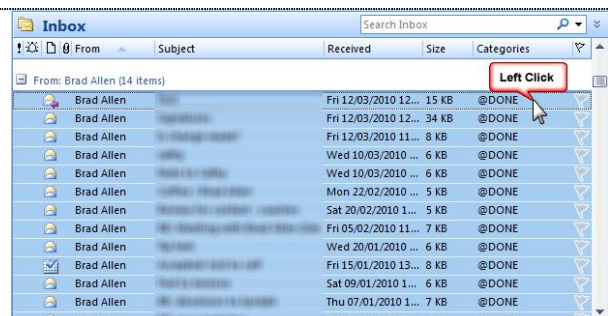
1. In your “InBox”, sort by sender, then browse through and delete everything that really isn’t needed.



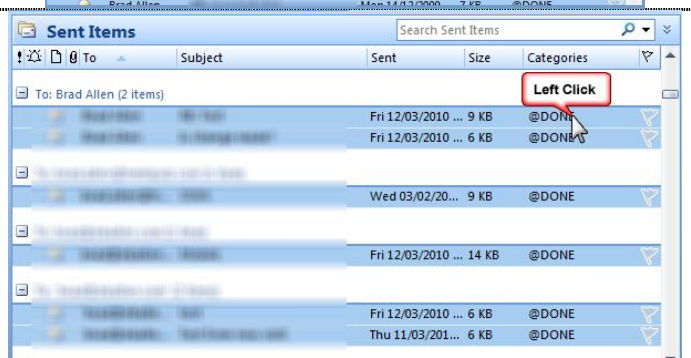
### PART B: Mark everything “done” (for now).

Before you move e-mail to your action, project or reference folders, you want to minimise the amount of “processing” you need to do.

1. Open the “Inbox” folder, click CTRL-A and click the “Categories” column to all e-mail tag as @DONE



2. If you plan to file your sent items (as per the “Advanced” setup, repeat step 1 for “Send Items”.

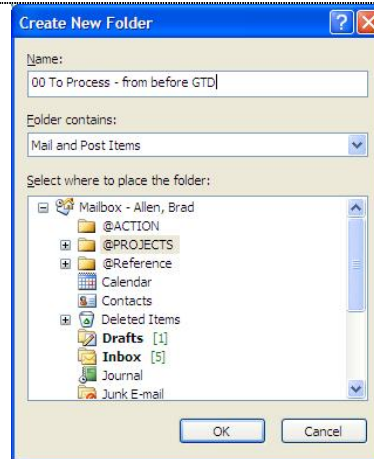




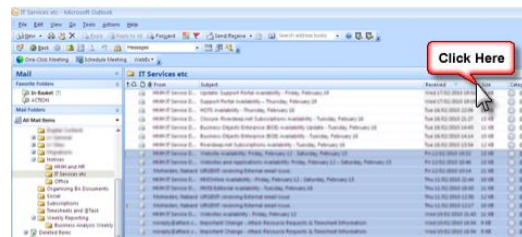
**PART C: Defer older e-mails.**

If you have hundreds of e-mails, it may be unwise to attempt to process them all right now. A good idea is to create a temporary folder, move older e-mails there and then give yourself a next action to process them later.

1. Create a new folder under “Projects”, call it, “To Process – from before GTD”.



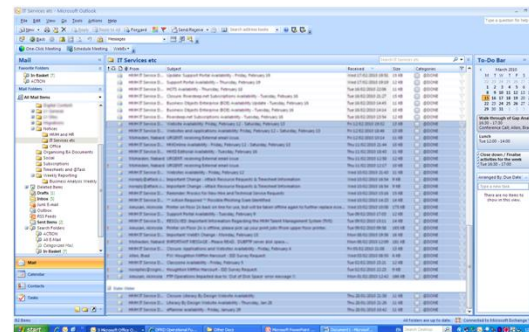
2. Now go to your “InBox”, sort by date (so the oldest item is at the bottom).



3. Click the last e-mail, now hold the SHIFT key down and click the UP ARROW. Keep going up until you start to see e-mails that grab your attention (i.e. you might have some outstanding action) – at this point release the UP ARROW and the SHIFT key.

4. With the older e-mails now selected, choose Move to Folder (from the Edit menu) and pick the folder you created in step 1.

5. If you are filing your sent items, repeat steps 2 to 4 for your “Sent Items” folder.

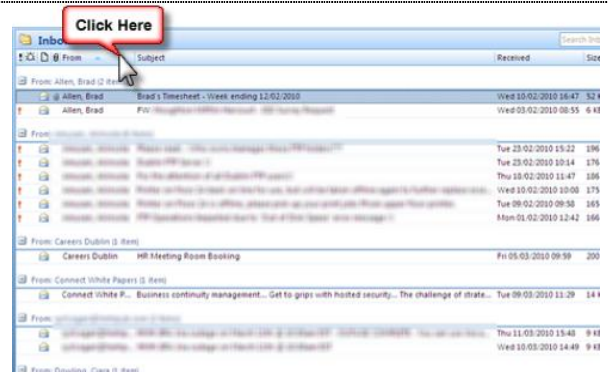




## PART D: Use grouping to eliminate urgent processing.

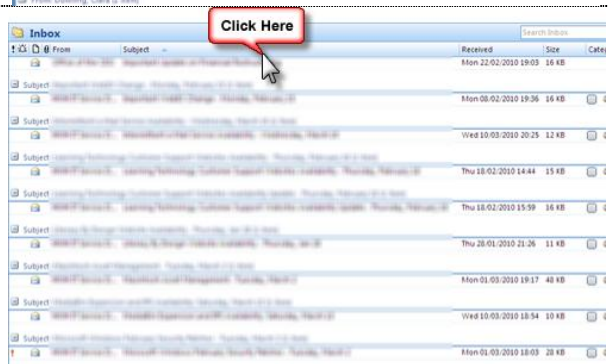
A further trick to reduce your processing time is to group your e-mails by sender and see if you can bulk move items relating to HR policies or IT notices to “reference” for example.

1. In your “InBox”, sort by sender, then browse through the groups, find “reference” items and create **reference folder** for these, then move the related groups of e-mails to these reference folders.



2. In your “InBox”, sort by sender, then browse through the groups, find groups of items related to the same project. Now create a **project folder** for these, and then move the related groups of e-mails to this project folder.

3. In your “InBox”, sort by subject, then browse through the groups, find “reference” items and create reference folder for these, then move the related groups of e-mails to these reference folders.



4. In your “InBox”, sort by subject, then browse through the groups, find groups of items related to the same project. Now create a project folder for these (if it doesn’t exist), and then move the related groups of e-mails to this project folder.

## PART E: Process the rest of your e-mails.

By now you should have a manageable amount of email. The steps to process each are as below.

1. Review the e-mail. If it is “done”, delete or move it to a project or reference folder.
2. If the e-mail is “not done”, clear the category column (removing the “@DONE” category), record the next action in your list manager and then move the item to a project folder. Note: By removing the @Done category, this e-mail will now appear in your “Action Support” search folder so you can easily find it.

