

Outlook and Organizing Your Real Life: A Guide

By Drew Brown

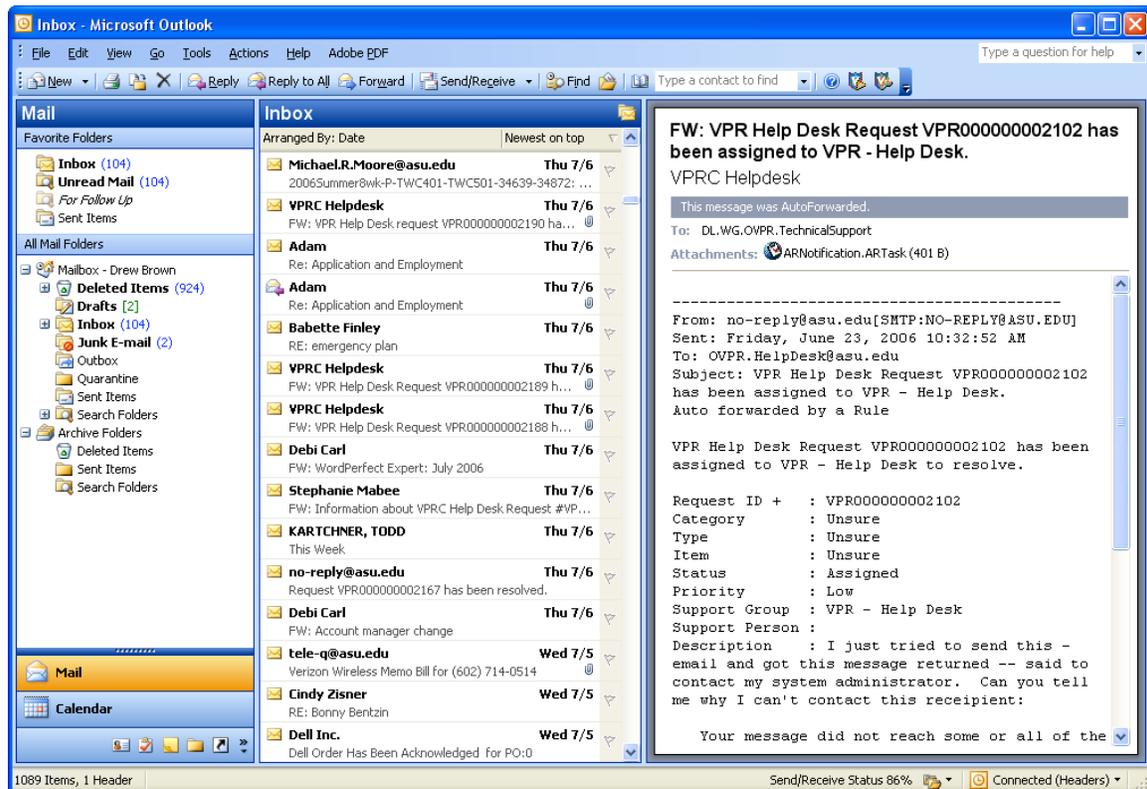
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Introduction

Computers can make your life more complicated and full of stress, or they can work for you and organize your free time. The choice is yours. With a little effort you can choose the latter and be highly productive. The key to using the computer as a tool is getting organized. "I have my system" you say? "I get the important things done." I am sure this is true, but wouldn't you like some additional time for that other project or for some stress relief?

There are many tools and methods for getting organized. This paper will walk you through organizing your work and your life using the popular but under utilized tool Microsoft Outlook. You may use Outlook every day and not realize how much more it can be doing for you. We will discuss advanced rule usage, categorizing, and color coordination. We will then use these tools to set goals and prioritize. This document is intended for users that already have and use Outlook.

This is a screenshot of my Outlook screen before doing anything to organize it.



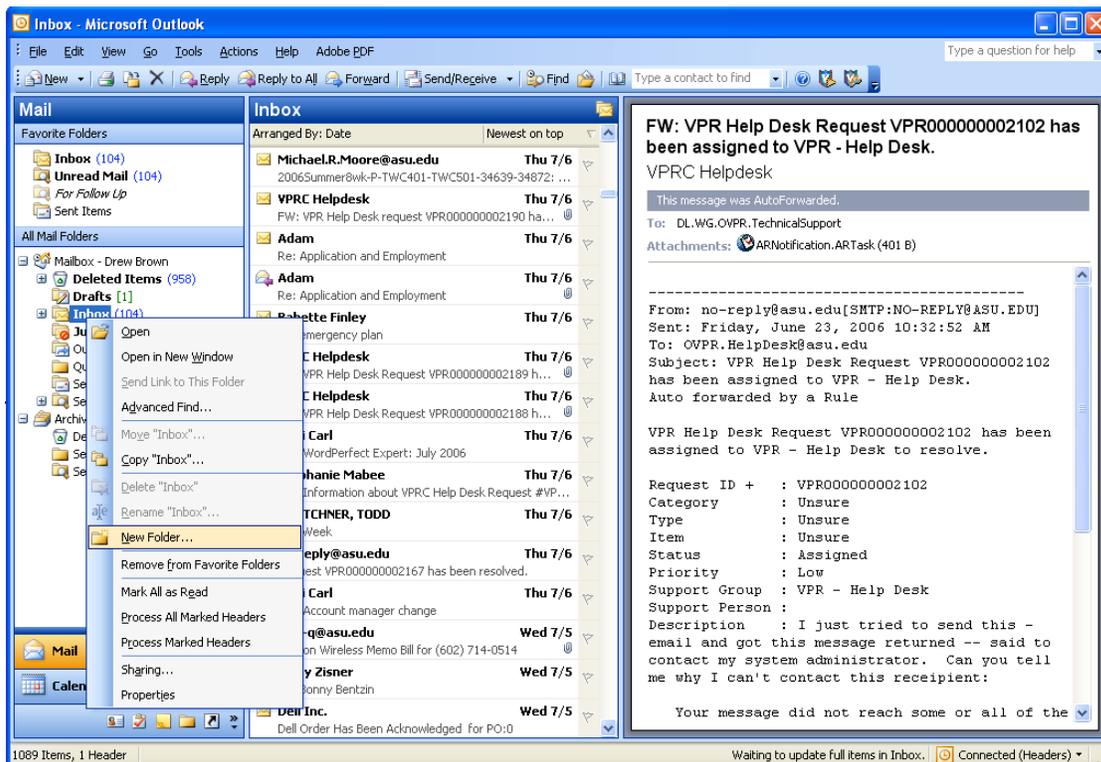
It looks just like a long list of work to me. What I need is to get directly to what is most important and most urgent. Come with me through the following sections as I get myself more organized.

- Rules to the rescue!
- Categorizing is fun
- Color Coordination
- Prioritize your Goals

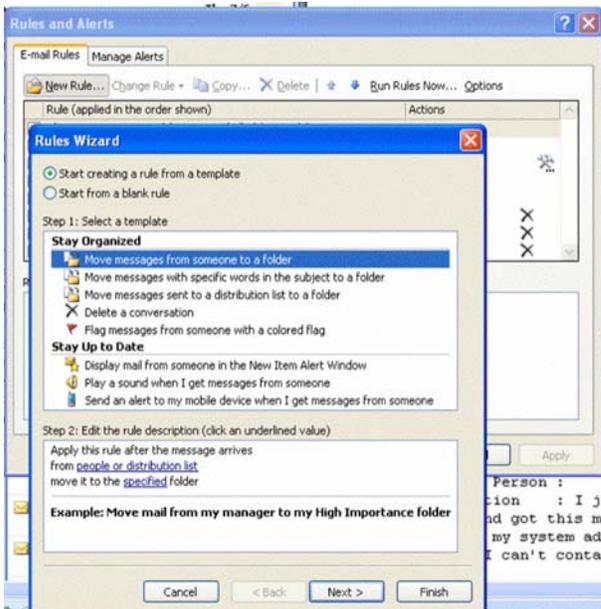
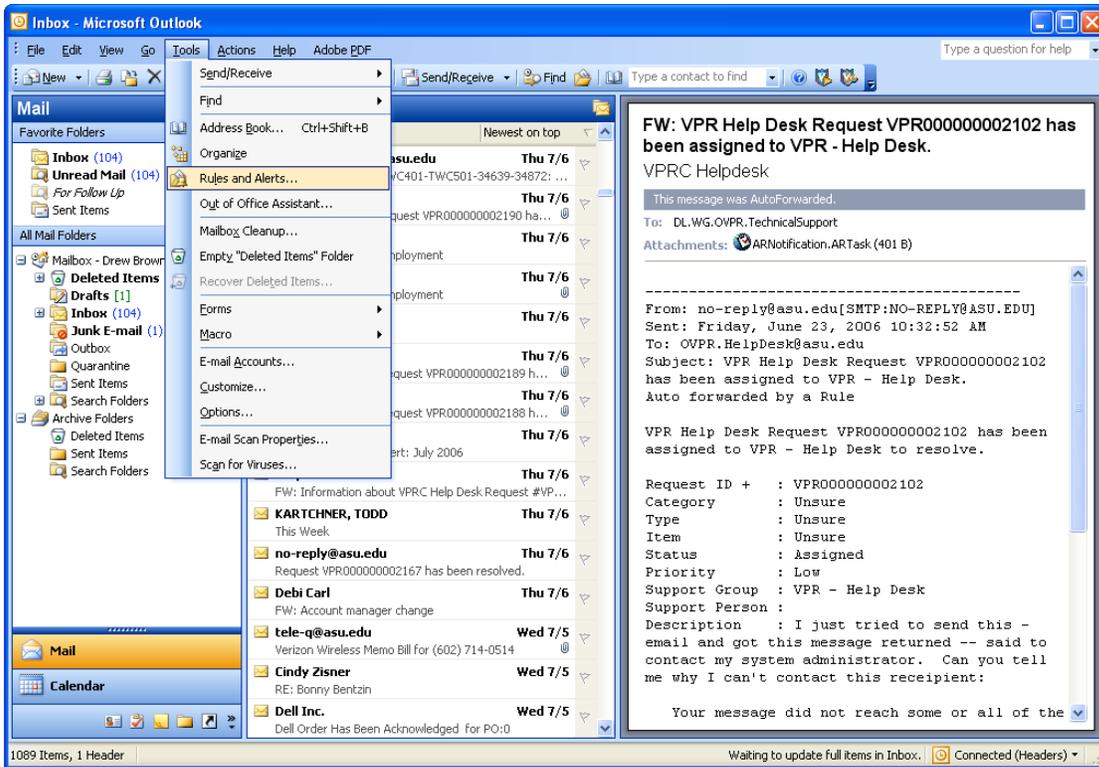
Rules to the rescue!

I will start with the currently displayed email. It is from a person at work and is sent to some technicians I manage. I don't directly need this email but I get a copy because I am the manager. I will create a folder and a rule to move this, and others like it to that folder for me. That way I have them if I need them but they don't get in my way.

To create the folder, right click on "Inbox" and click "New Folder". (Shown below.) Enter a name and click "OK." I will call my folder Helpdesk.

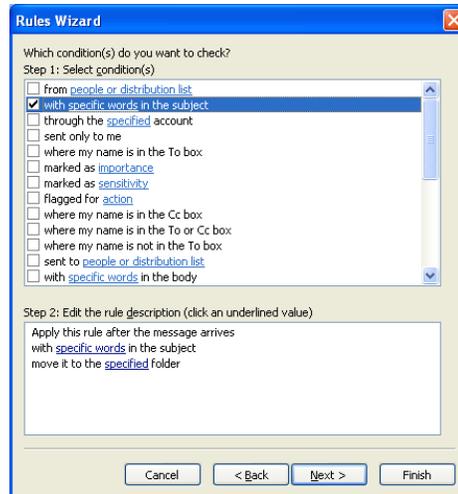
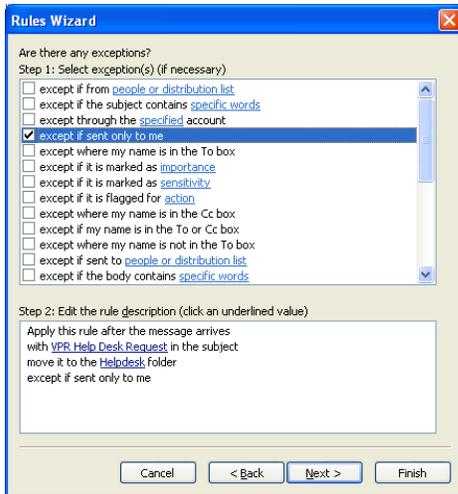


The next step is to make the rule that will move email into the folder and optionally mark it as read. First click on the tools menu and then click "Rules and Alerts..."

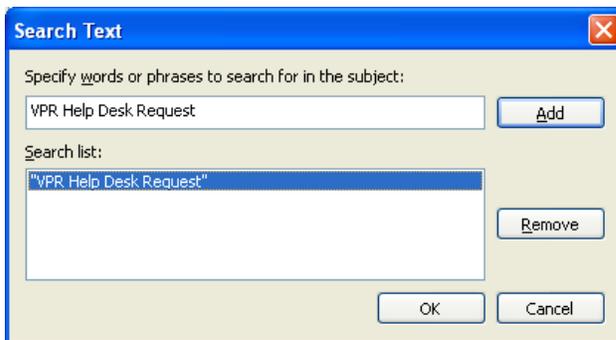


Next click the **“New Rule button”** and the Rules Wizard will start. For this instance I will use the default selection of **“Move messages from someone to a folder”** and click Next.

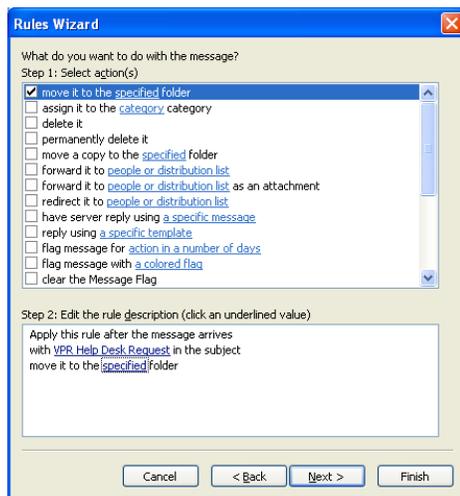
These emails always come with the same words in the subject line so I will select the second option as shown in the image below. The confusing part here is that I must now look down on this screen to the section called Step 2 and click on the underlined words **“specific words”** in order to enter them.



Now I can enter the text that will trigger the rule. I enter VPR Help Desk Request and click "Add." If you don't see your text listed in the Search list area you still need to click Add. Next I click "OK."



Click next on the wizard to make your screen look like the one below. Notice "move it to the specified folder" is already selected. While you are here take note of some of the other options. One that I like is "mark it as read" so that my total unread emails does not include these messages. Once you have selected your folder and any other options you want, click "Next."



But, but, but, what if someone sends me and only me an email with those words in the subject line? Don't worry your digital pilgrims. The next step is to configure exceptions to the rule. I select the exception "except if sent only to me." Pick your exceptions and click "Next."



The last step is to give the rule a name and turn it on. Since I have a lot of these I will also make the selection "Run this rule now on messages already in 'Inbox.'" I click "Finish" and the gerbil in my computer starts running.

After some work all emails with VPR Help Desk Request in the subject line are moved to the Helpdesk folder unless they were sent only to me. This will happen to all future email as well.

More advanced rules

I know you get the gist of it now so try some of these on for size. Try to make a rule that will delete that annoying spam you get almost every day. You know the one, "Real fake watches" or those pills that you are just not interested in. If you are like me a certain number of spam messages are the same thing over and over. Have your rule delete it or move it to a spam folder.

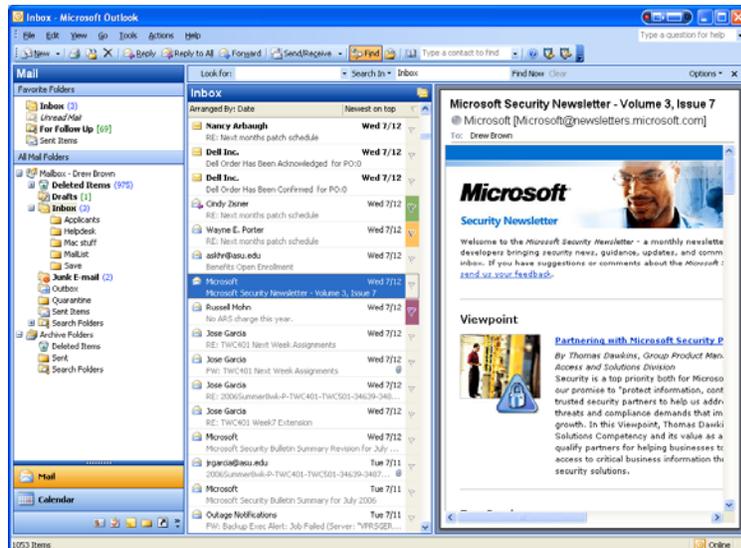
Challenge me you say? Make a rule that will have your computer play a sound when a message from your boss arrives. No not the theme for the death star, just something to get your attention on an important message.

Deal with more people that just one boss? Make rules to apply a colored flag to messages from those you need to see. I mark some clients with orange, purple, and yellow flags so they stand out to me.

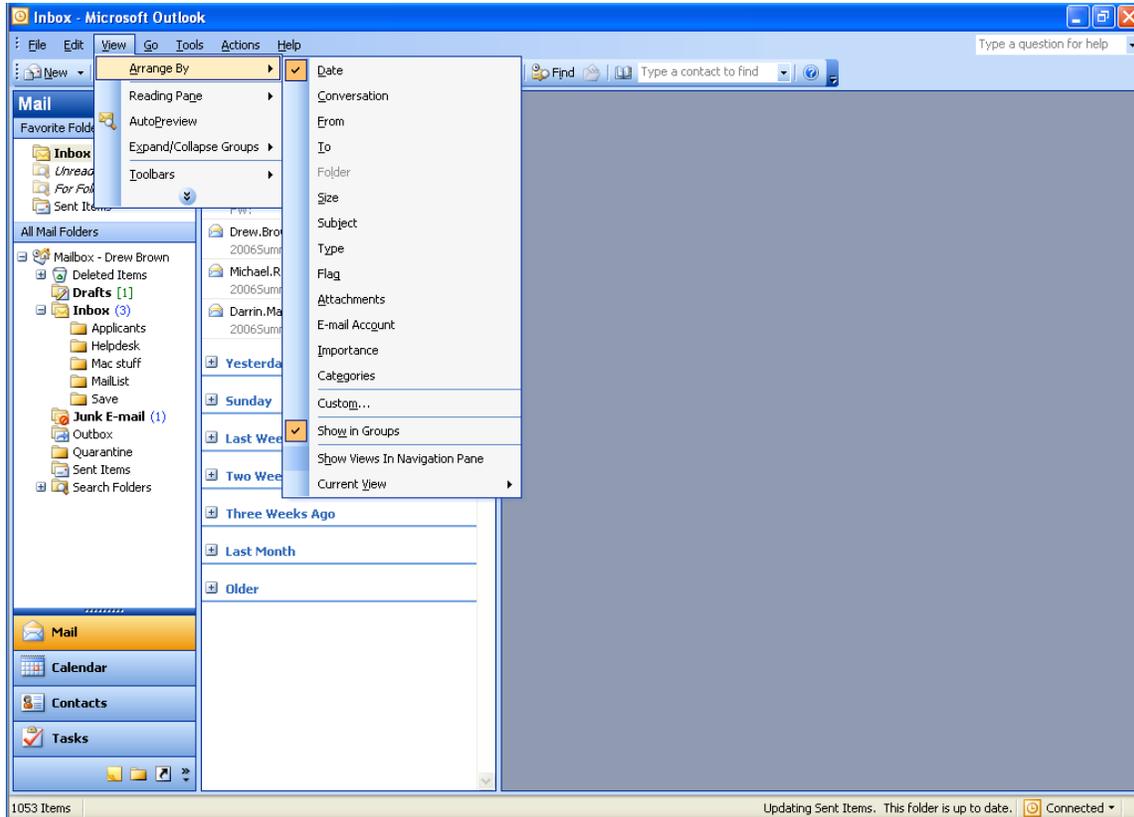
Here is another look at my Outlook. I have added some folders under my inbox, and made rules to sort my mail for me. It looks a little more manageable but we are still not done.

Categorizing is fun

I have a lot of email that I would like to keep so I can go back to it later. Placing email and other items into categories will help me find them when I need them. Grouping by



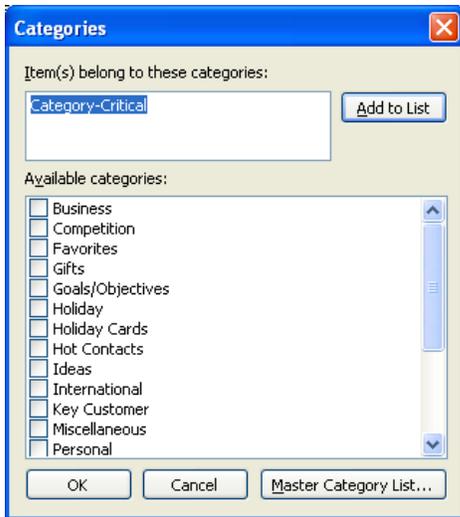
category will simplify how I see all that email. Outlook does some grouping and categorization for you. For example, click on the "View" menu at the top and then click "Arrange By" and then date. Next click on the "View" menu at the top and then click "Arrange By" and then "Show in Groups." Your Arrange By menu should look like the one pictured below.



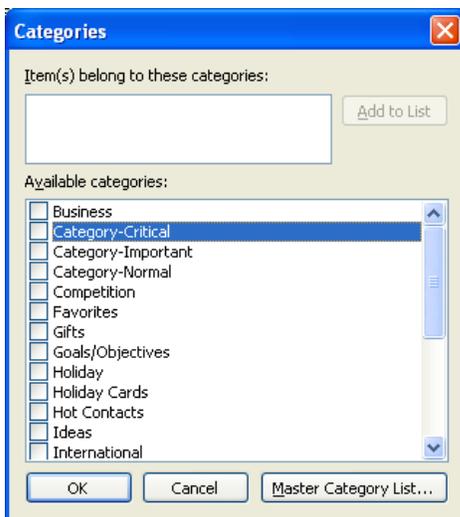
Outlook will add a plus/minus sign next to each set of emails organized by date. Clicking it will expand or collapse the group. Doesn't this look more manageable? Now I only see the email from today. Alternatively, I could make a category called "Done." Then as I am done with an email that I want to keep I add it to that group. It will stay in my inbox but I can click the plus/minus sign and close it from my view.

Making your own categories lets you do more than just group by date. This is the time management piece you have been waiting for. Consider this, at any given moment you have a certain amount of email on your computer. Some email is critical and must be taken care of promptly. Other email is important, but not at the mission critical stage. Lastly a lot of email is not important at all. Not to say that it is junk mail, but it is the background noise around your life. I will label these three categories category-critical, category-important, and category-normal. You will see why I put category- in front in a moment.

In Outlook, click on the "Edit" menu and then "Categories." In the box that opens up type in Category-Critical and click "Add to List."

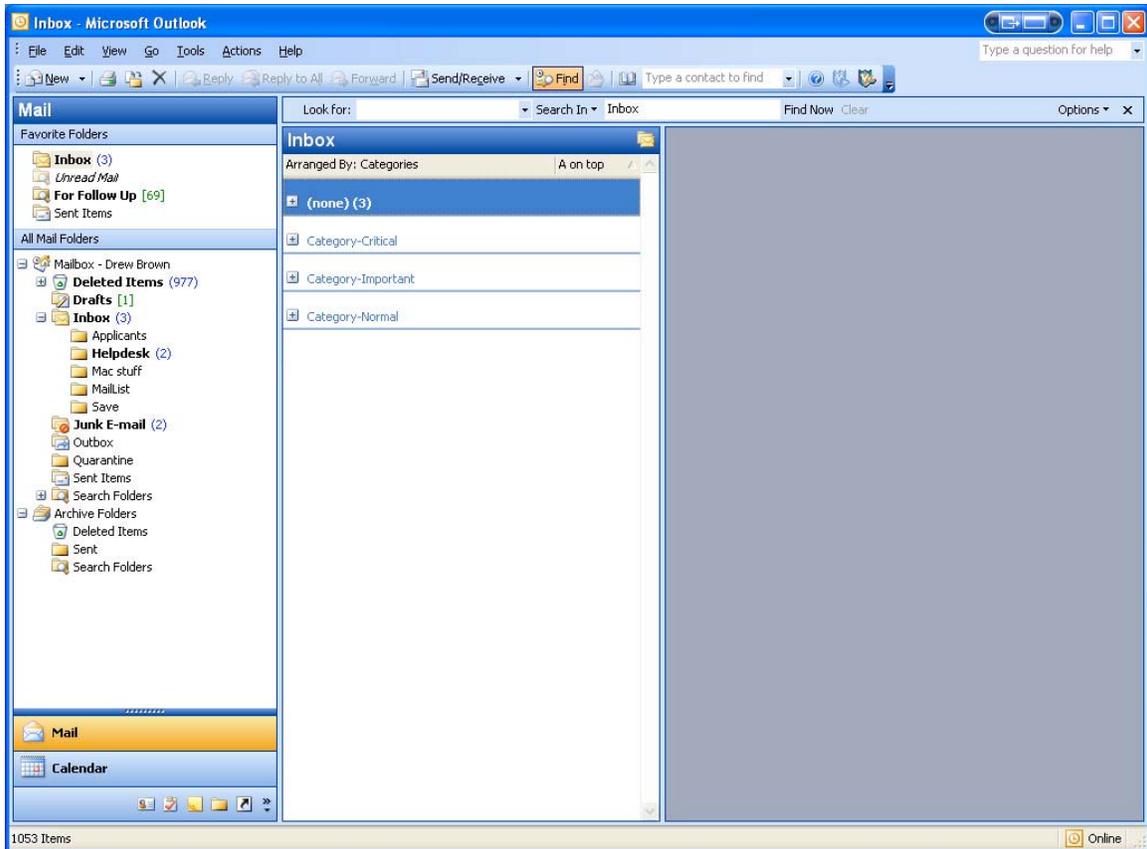


Next type in Category-Important and click "Add to List." Do the same for Category-Normal. When you are done you can remove any that are checked. Your screen should look like the one pictured below. When it does, click "OK."



Notice my Critical, Important, and Normal are listed together because I put Category in front. You could abbreviate this to be C-Critical if you want. Now it is time to label your email with these categories.

Right click a critical email and click "Categories." Then click the Category-Critical selection and click OK. Do the same for an important and normal email. After you have categorized a few to try this out, click on the "View" pull down menu, "Arrange by" and Categories. Your screen should look something like this.



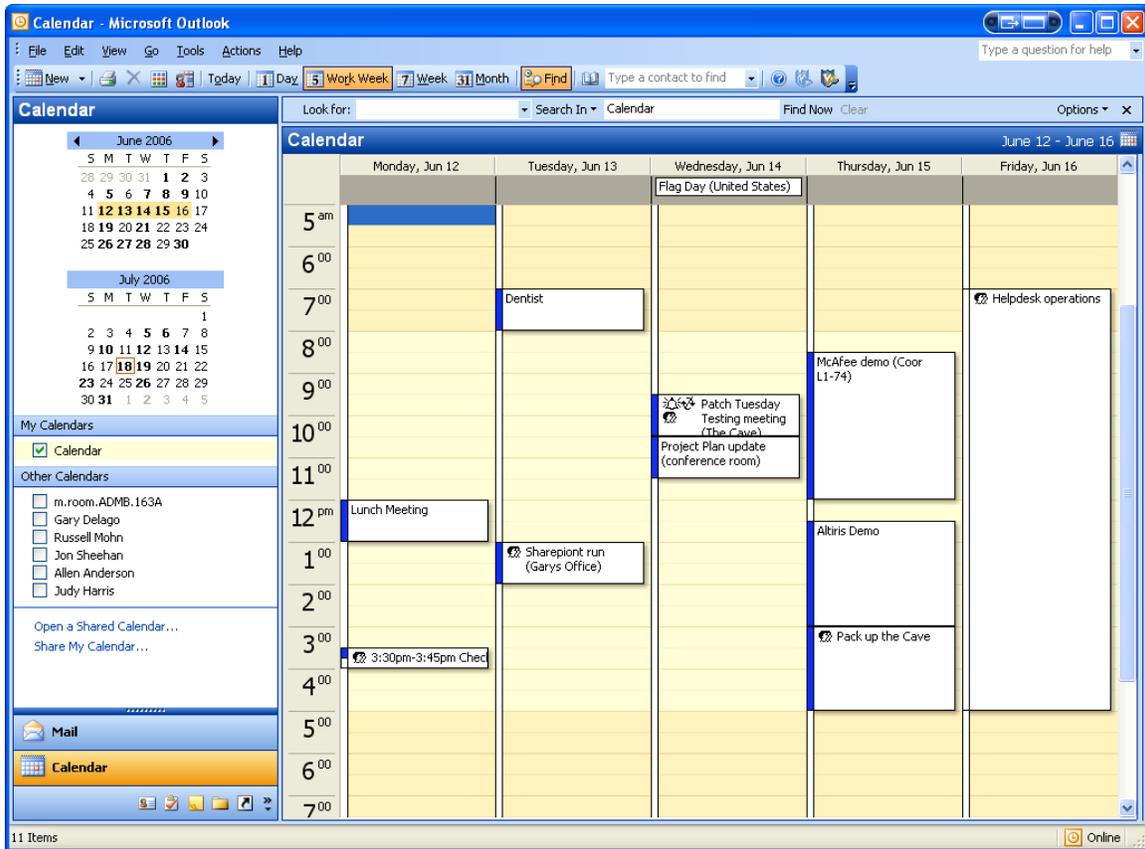
Now at any given time I can look at my email in the order of importance, rather than simply when they arrived. Most of your email will still be in the “none” category. Here is the first of two time saving tips for categorizing email. You can right click on an email and choose “Categories” and then press the “C” on your keyboard once to highlight Category-Critical, a 2nd time to highlight Category-Important, and a 3rd to highlight Category-Normal. When the right one is highlighted, press the spacebar and then the enter key. The next time saving tip is to create a rule that will categorize your email for you. Have it search for project titles, or depending on who the email is from. If a rule sets a category, you can always adjust it later.

I think you get the idea with email, so I will simply say that categories are a huge help for Outlook tasks. Assign each task a category and then when you are planning your day or have some time, tackle the top ones first.

Color Coordination

Use your calendar to schedule time for your important projects. Marking email and calendar items with certain colors will help you see what your day is like at a glance and will also help you know how to handle interruptions.

For example, below is a picture of my calendar without any coloring. A client wants to meet with me on Thursday but as you can see my day is full. This is an important client so I need to make time and I need to make them feel like I don't hesitate to make time for them.

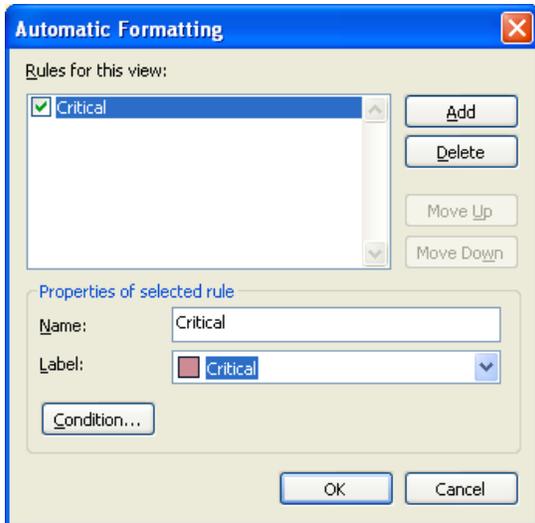


The first step is to categorize the items on my calendar. To do so, I can open each item and click the “Categories” button in the lower left corner of the screen.

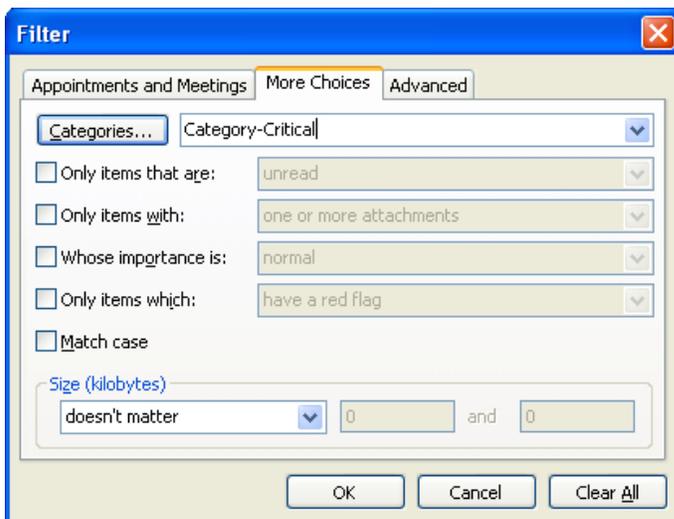
Next I need to decide which color will indicate each of my three major categories. Click the “Edit” pull down menu, then “Label” and then “Edit Labels.” You can see in the example below that I have only changed the names of the top three colors Outlook gives me. I made red Critical, blue Important, and green Normal. After changing the names to how you want them, click “OK.”



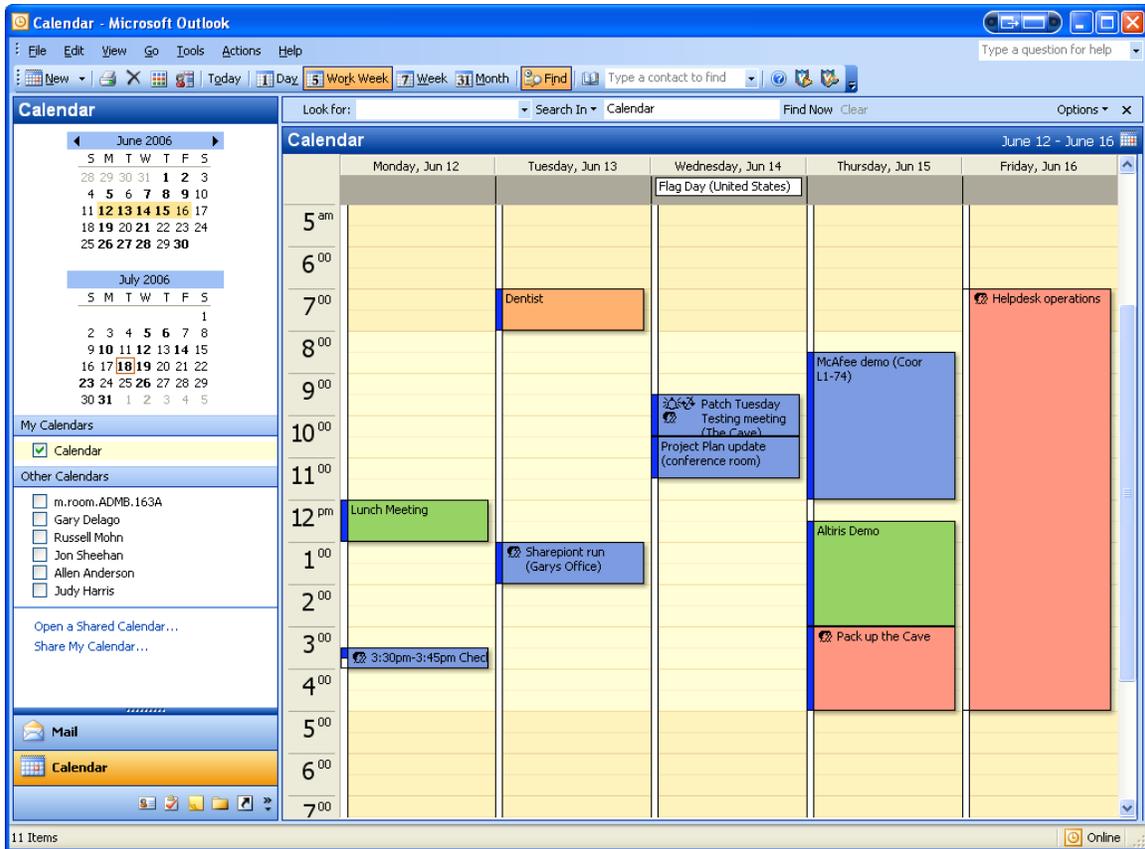
Next I need Outlook to automatically set the color of an item based on its category. To have Outlook color calendar items based on the category, click on the “Edit” and then “Automatic Formatting.” Click “Add” and then enter the name “Critical.” Also set the label as Critical. Your screen should be similar to the one below. (Don’t click “OK” yet.)



Next click the “Condition” button. A new window will open and you will click on the “More Choices” tab. From there click the “Categories” button and select “Category-Critical” as indicated below.



Click “OK” and then do the same for the other two categories. After all three have been added click “OK” to get back to your calendar. Any items you have set to be in one of the three categories should be the color you selected. Here is a picture of my calendar with each item in a category and Outlook applying the colors I selected.



Now back to my client. I need to bump something from Thursday. The item called Altris Demo is a normal priority while the others are important or critical. I can quickly see when I should meet with my client.

Prioritize your Goals

Everything takes time. You should take some time and write down your personal and career goals. Actually write them down, don't just think you know what they are. Enter each goal as a task in Outlook. Then rate each one as Critical, Important, or Normal. Each week schedule on your calendar a planning session for that week (mark it as a critical appointment.) My planning session is normally Sunday night. During your planning session set time you're your calendar to work on your most critical goals. Some goals take years with others may take hours. Spend a little time each week on those bigger goals.

Don't be afraid to change how you categorize your goals. Priorities can change. Be willing to add new goals to your list. And to your life.