

Managing Email with Personal Folders

- I. Create Personal Folders
- II. Create custom folders for specific messages
- III. Automatically deliver messages to custom folders
- IV. Deal with Junk mail
- V. Using the Calendar

This document contains information to help you manage the growing amount of email that you have to deal with on a day to day basis. It is critical that the individual user take the appropriate action in dealing with email overload.

A full inbox is stressful to look at, filled with weeks or months of old work to accomplish, messages to reply to (including an apology for being so late), and irrelevant messages to weed out. Especially large inboxes are more likely to crash, losing all contents.

The first objective is to empty the **Inbox**. We can create **Personal Folders** to store messages on your hard disk or on a network drive separate from your **Outlook Today** folder and your **Inbox**.

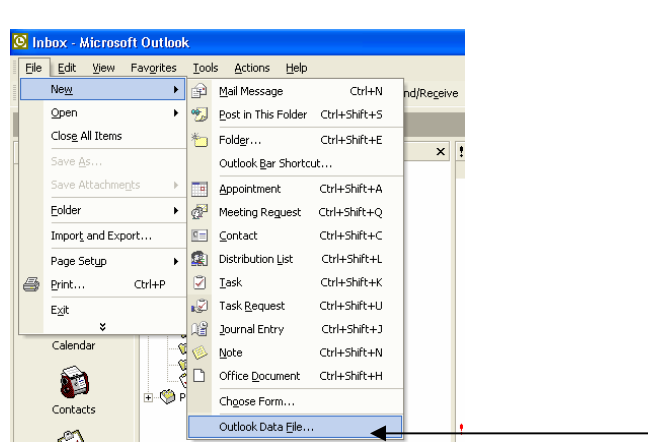
After we create the **Personal Folders**, we can set up some custom email folders and some rules that will automatically deliver your messages to the desired folders. By managing and organizing your email in this way you will be able to prioritize, designate, or assign email to various destinations and deal with it accordingly.

Note: if you create the **Personal Folder** on a network drive it will be placed in a separate store and it will be backed up regularly. **This is recommended.**

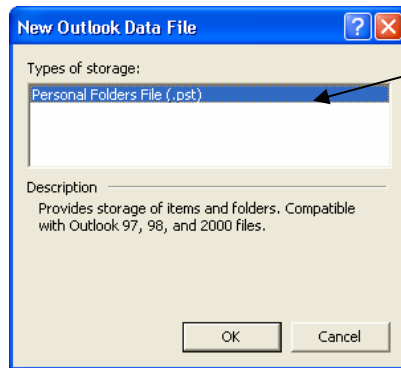
If you create a **Personal Folder** on your local hard drive you will be able to access your messages whether or not you are connected to the server.

I. To create a Personal Folder on a network drive:

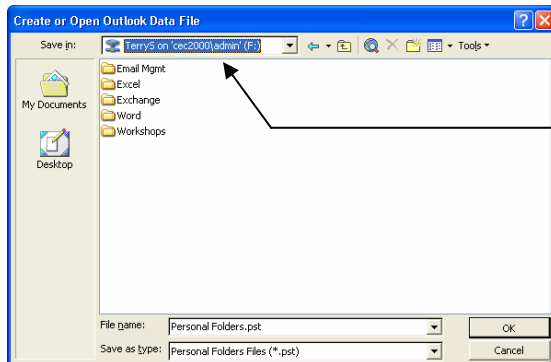
1. Log on to Microsoft Outlook.
2. On the **File** menu, point to **New**, and then click **Outlook Data File**.



3. In the **New Outlook Data File** dialog box, click **Personal Folders File (.pst)**.



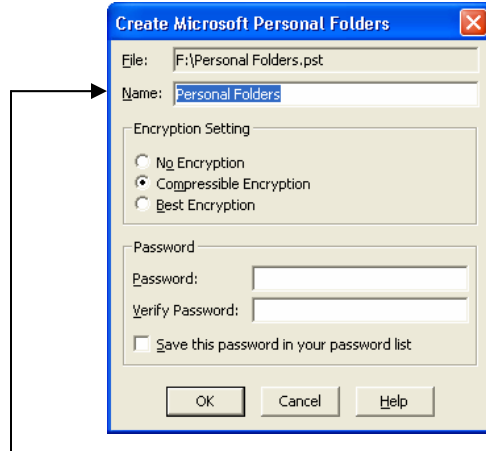
4. Click **OK**. The **Create or Open Outlook Data File** dialog box opens.



Select the network drive or the hard drive where you want to store the Personal Folder.

5. In the **File name** box, type a name for the file, or leave the default, then click **OK**.

6. The **Create Microsoft Personal Folders** dialog appears.

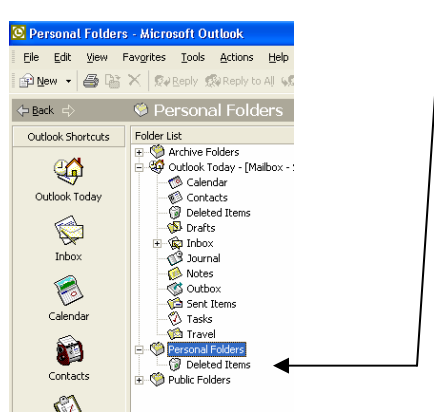


In the **Name** box, type a display name for the .pst folder, or leave the default.

(If you wish, you can add a password of up to 15 characters. If you select the **Save this password in your password list** check box, make a note of the password in case you need to open the .pst on another computer.)

7. Click **OK**.

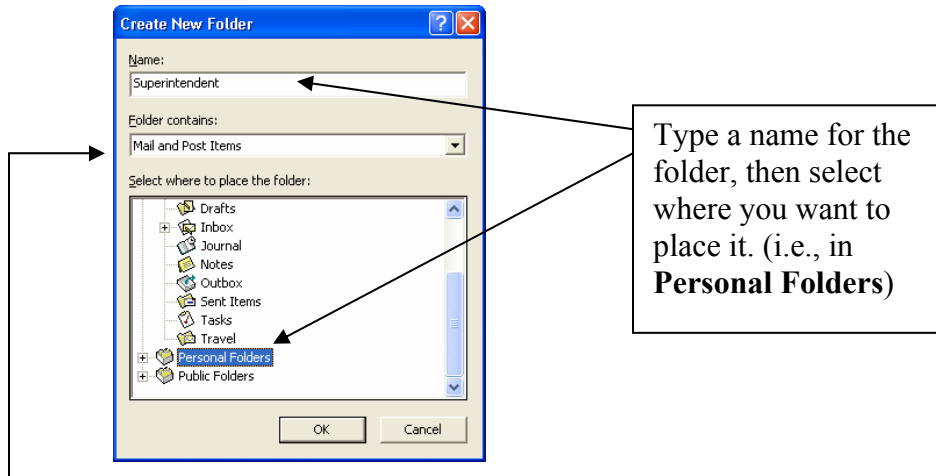
The name of the folder associated with the data file appears in your **Folder List**. When you expand it, you will see that a **Deleted Items** folder is attached to it.



II. Creating Custom Email Folders.

You may want to create a folder to store messages from the **Superintendent**, a folder for messages from other **Principals**, a folder for **To-Do's**, and a folder for **Junk mail**. Then you can have the incoming mail delivered into the appropriate folder.

1. In **Outlook**, from the menu click **File > New > Folder**.



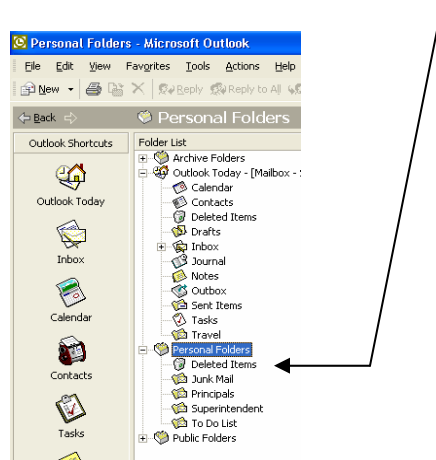
Make sure you also specify that the folder will contain mail items. (This will be the default if you create this new folder while your **Inbox** is open).

2. Click **OK**.
3. In the dialog box asking you if you want a shortcut to this new folder placed on your **Outlook Bar**, click **No**, and it will appear in the **Folders List** under **Personal Folders**. Now it's a simple matter to drag and drop messages from the **Inbox** to custom folders, which keeps them organized and much easier to find.



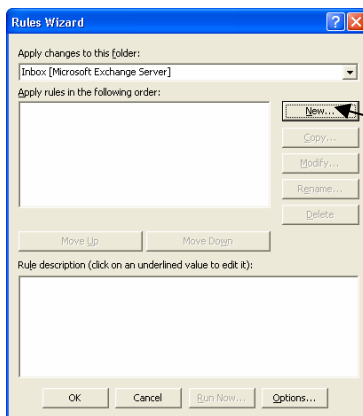
(Click **Yes** if you want it to appear in the **Outlook Bar** on the left hand side of the screen, under **My Shortcuts**.)

4. Your **Folders List** may look something like this:



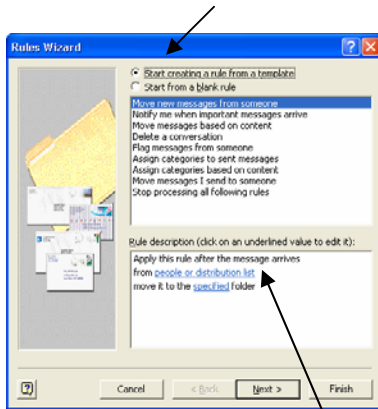
III. To automatically deliver email to the custom folder.

1. Click on **Tools > Rules Wizard...** to display the following dialog box.



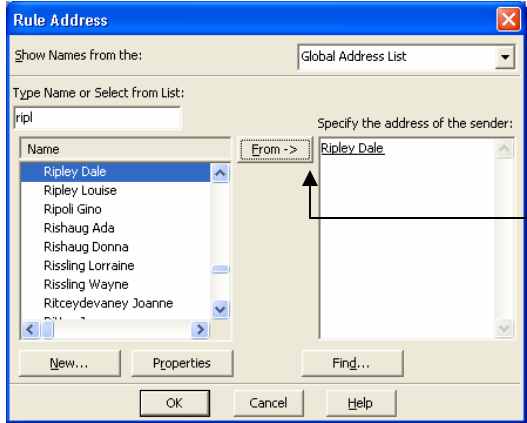
Click **New** to create a new rule.

2. You can start creating a rule from a template or you can create your own rule. Here, we will use the template.



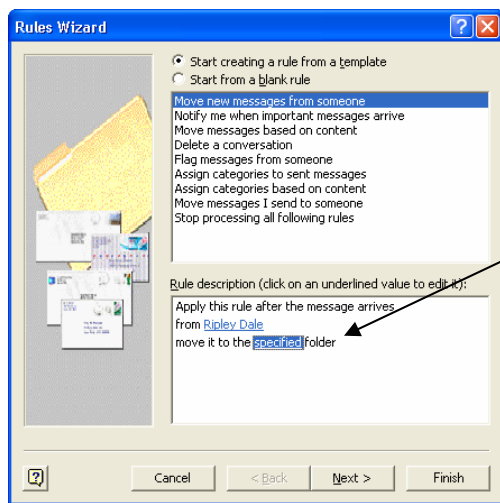
Select **Move new messages from someone**

3. Click people or distribution list to display the following dialog.

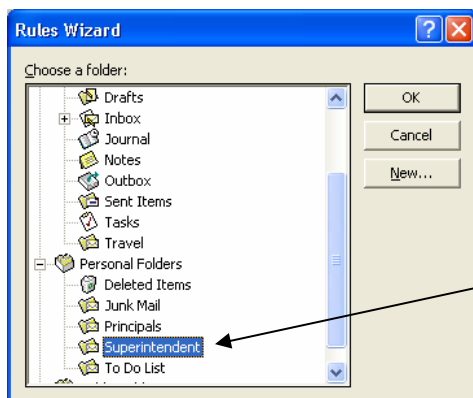


Select the desired person or group then click **From >**. Click **OK**.

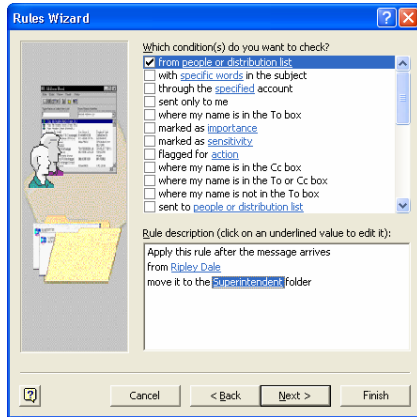
4. You will return to the **Rules Wizard**. Click on specified folder.



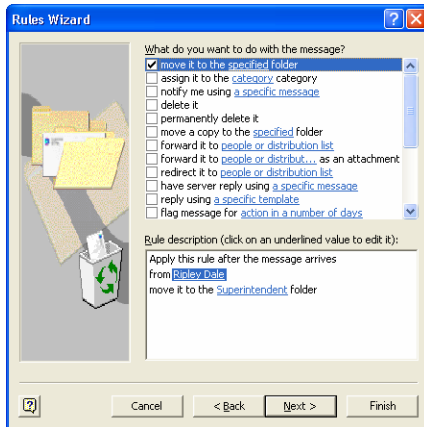
5. Click the folder that you want as a destination for the desired messages. Click **OK**.



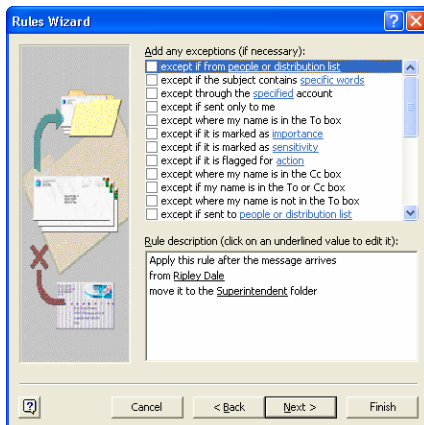
- Click **Next**. Click check marks beside any conditions that you feel may be necessary for this email to meet.



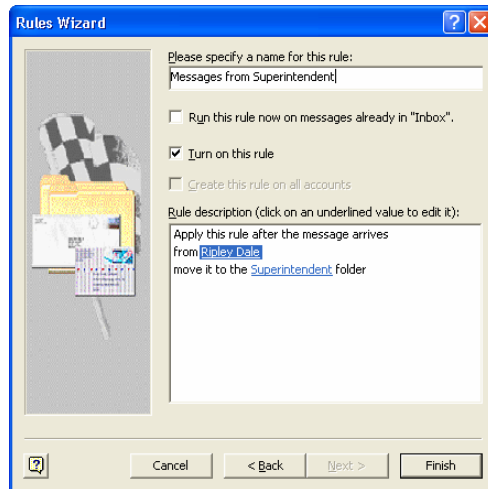
- Click **Next**. Click check marks beside any desired options. You can have the message moved to a certain folder, forwarded to another address, deleted, etc., by scrolling through all the choices and selecting one to apply in this rule.



- Click **Next**. Choose any exceptions to the rule, if necessary.




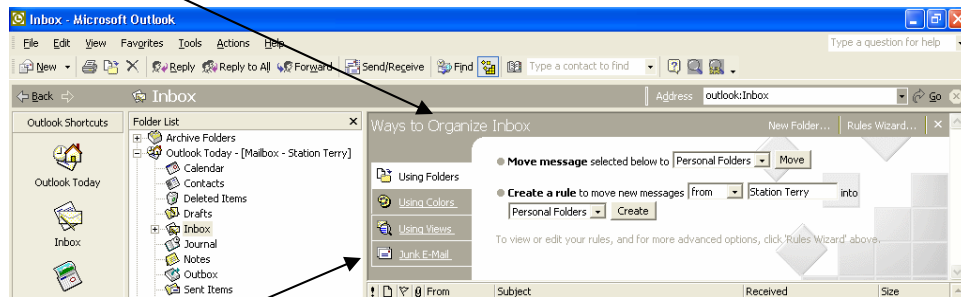
9. Click **Next**. Type a name for your new rule, and make any other choices in the dialog that you wish.



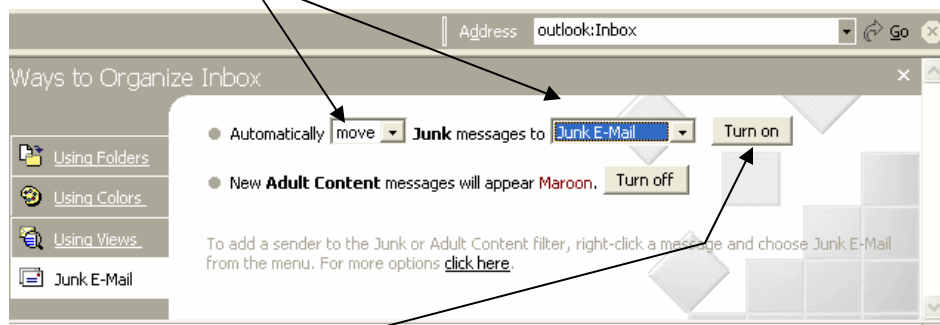
10. Click **Finish**. Click **OK**.
11. Repeat the above procedures to automatically place selected messages into other desired folders.

IV. Dealing with Junk Mail.

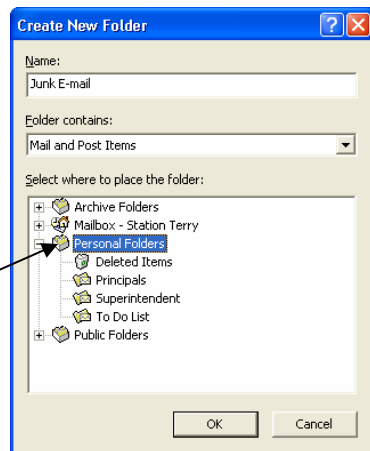
1. Open Microsoft Outlook.
2. Click **Tools > Organize** or click the Organize button  on the toolbar to display the **Ways to Organize Inbox** frame.



3. Click **Junk E-Mail** and click the selections as shown below:

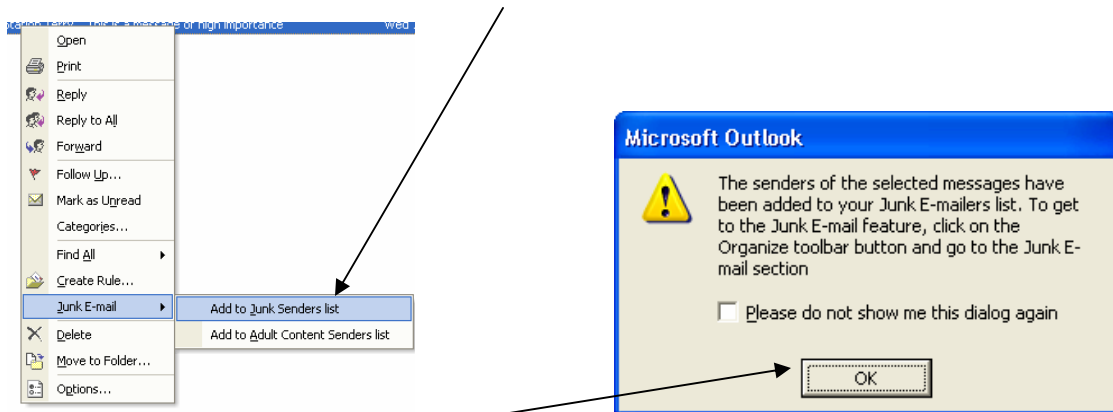



4. Click **Turn on**.
5. The **Create New Folder** dialog appears.



6. Select **Personal Folders**, then click **OK**. Click **No** in the next screen and the **Junk E-mail** folder is created in your **Personal Folders**.

- To send a message to the Junk mail folder, from the **Inbox**, right click on the desired message and choose **Add to Junk Senders list**.



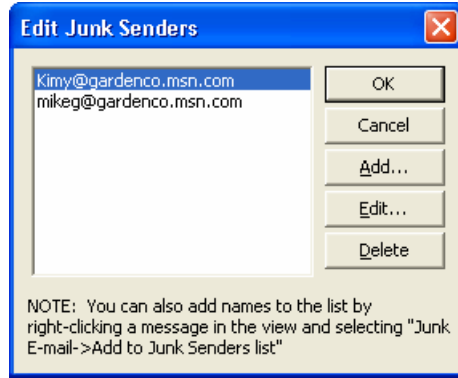
- Click **OK**.
- To edit your Junk email list click the Organize toolbar button  again then click **Junk E-mail**.



- Click **here**.



- Click **Edit Junk Senders** to display the editing dialog box as displayed below.

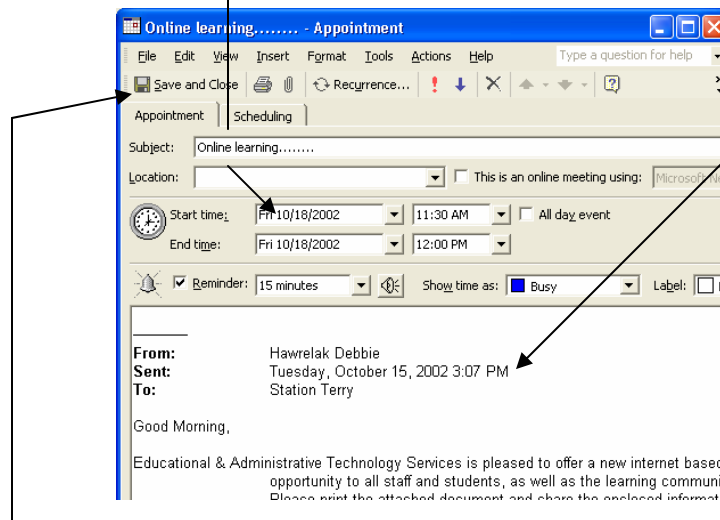


12. Here you can delete a sender from your Junk mail list or perform other editing changes.

V. Adding a message to your Calendar.

If you receive an e-mail message in Outlook and you don't have time to respond to it immediately, you can easily add it to your calendar and schedule a block of time when you will be able to reply. To turn an e-mail message into an item on your calendar:

- 1) Drag the message from your **Inbox** onto the **Calendar** icon on the **Outlook Bar** or onto your **Calendar** folder. This will create a new appointment item similar to the one shown below.
- 2) Enter the date and time you want to reply and specify any additional options you want. (The body of the e-mail message is automatically added to the appointment.)



- 3) Click **Save and Close** to add the appointment to your calendar.