MICROSOFT OUTLOOK
FOR LEGAL PROFESSIONALS

Covering Outlook for Windows Versions
2013, 2016, 2019, 2021 and Microsoft 365

Affinity
CONSULTING

MICROSOFT OUTLOOK

FOR LEGAL PROFESSIONALS

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Mac users: If you are using this manual with Outlook for Mac, some of the steps will be different. Further, some features available in Outlook for Windows are not available in Outlook for Mac.

The materials in this book were written using Microsoft 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Microsoft 365, your software experience may vary slightly from what is seen in this manual.

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Version 4.02

MEET OUR TEAM OF OUTLOOK EXPERTS

Meet our team of Outlook experts who have co-authored this manual.

BARRON HENLEY

Most people wouldn’t relish the idea of spending a day in a conference room, teaching Microsoft Outlook. Barron is not most people. There are few things Barron enjoys more than teaching all-day software training classes.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training people on Word or helping transition organizations transition from WordPerfect, he focuses on automating documents and teaching CLE classes for attorneys across North America.

PAUL UNGER

While most people understand the day-to-day struggle of keeping up with email, Paul knows how to tackle the problem better than anyone. Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of Tame the Digital Chaos – A Lawyer’s Guide to Time, Task, Email and Distraction Management, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.

DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.

MICROSOFT OUTLOOK FOR LEGAL PROFESSIONALS
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CHAPTER 1
MANAGING EMAIL IN A LEGAL ENVIRONMENT

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

This manual would be remiss not discuss why legal professionals need to be more efficient in using Outlook in the first place.

The Email Problem

Email Overload

Studies indicate that lawyers receive around 120 and send roughly 40 emails per day.[1] Without question, email is one of the most important technological communication advancements of the past 100 years. It has fundamentally changed the way we communicate with clients and do business. Major corporations and law firms are run via email communication instead of face-to-face communication.

For lawyers, emails present a wide array of issues that most of the business world and ordinary consumers will never face. In this seminar, we will discuss these issues and teach you how best to deal with them.

These issues or problems range from ethical considerations to email overload and time-management. While there is no perfect solution, there are many methods to effectively handle email.

The first step to any problem is to understand the problems that exist. We must get our arms around all the email issues that face lawyers. The second step is to isolate each problem and tackle each problem, without forgetting how that might affect other email problems. For instance, controlling spam email may prevent you from getting an important email from a client if your spam filter inadvertently catches an email from a client. In other words, when you solve one problem, it may open up a different can or worms.

Torrent of Interruptions

In an eight (8) hour workday, if we receive 100 emails, that equates to receiving one email every 4.8 minutes. Sound familiar? It should, because that is the world most of us live in. Combine that with instant messages, phone calls and what I call email curiosity interruptions, that equates to one interruption every 2-3 minutes! What can you do to minimize the distraction?

Take the following quick survey:

[1] See https://www.templafy.com/blog/how-many-emails-are-sent-every-day-top-email-statistics-your-business-needs-to-know/

1. **Interruption Survey:**

- Average number of emails you get per day: _______
- Average number of Instant messages per day: _______
- Average number of phone calls you get each day: _______
- Average number of curiosity email or internet breaks each day: _______
- Total Interruptions Per Day _______

2. **Other Questions to Ask Yourself:**

- How many times do you look at your email each day? _______
- What percentage of interruptions really need immediate attention? _______
- Has technology simplified your life? ☐ Yes ☐ No
- Does technology control your day? ☐ Yes ☐ No

Email Storage

What do we do with all of this email? There are several problems related to this:

- How should you archive old email?
- How do you deal with attachments and keep from losing them?
- How do you search for old conversations quickly and efficiently?
- How do you keep your email but not run out of server space? Why does the IT person keep telling you that you have too much email in your inbox and you're clogging up the server?

Too Much Legitimate Email to Deal with Effectively

Many people simply receive more email than they can read and keep up with. How do you sort, store and track all of this email?

No Expectation of Privacy

The old saying goes: You should never send an email that would embarrass you were it to appear on the front page of tomorrow's paper. Is there anything you can do to create an expectation of privacy?

Spam Getting Through

There are lots of ways to avoid SPAM, and yet it still manages to get into our mailboxes. What can you do about it?

Are You Using Outlook Effectively?

Probably not. Although millions of people use Outlook, most do not use all of its functionality to their advantage. In this seminar, we'll give you some great tips for making better use of Outlook.

Email Storage Problems

Disorganization

Many legal users have hundreds or thousands of unrelated messages in their inboxes. This is equivalent to taking all of the paper out of your files and throwing it on the floor of the file room. The point is, if it's not organized, then it's mostly useless.

Storage Space Limitations

You may have been scolded by your IT folks about this. If you're using Microsoft Exchange on your server, then it can get overloaded with the quantity of emails and attachments you keep in your inbox and Outlook folder structures. If you don't have Exchange, then all of those emails (and contacts, and appointments and tasks) are stored in a PST file on your hard drive or the server. The bigger that database, the slower your computer will run. Of course, the database can also over-run your storage capacity.

No One Else Can See Your Email but You

In most cases, if you have an important client communication in Outlook, no one else in your office can see it. In many cases, lawyers want to share this information, but don't know how to do it.

Difficulties Searching

Many people complain that it's nearly impossible to efficiently search old emails for a particular conversation. What can you do to make this task easier?

Dealing With the Overload

Deal with Email at Set Times

The first problem that we want to deal with is the reduction of interruptions so one can be more focused and productive. After all, how on earth can anyone get anything done with an interruption every 2-3 minutes?

Ask yourself the following question: 10 years ago, would you have let someone walk in your office every 2-3 minutes offering to sell you a sexual enhancement product… or asking you for a favor?

Of course, you wouldn't! So, why do you let it happen now with your email? Why do you drop everything that you are doing to read and/or respond to that email that just arrived?! You have invested thousands of dollars in this wonderful technology that is supposed to make you more efficient, but instead it has created an interruption hotline going straight to your brain.

Some time management experts suggest checking email 2 times a day. While this may sound like a good plan, it is probably unrealistic. When email was just becoming popular, there wasn't an expectation of that email would be dealt with immediately, so 2 times per day was probably okay. However, in today's age that has changed to some degree. Entire companies communicate via email … it's a way of life and the way everyone communicates. Checking email twice a day isn't enough. I think 3-5 times a day is more realistic … more satisfying to senders … and just as important, will make it easier for you to prevent your inbox from growing out of control.

A good way to handle this is deal with email at the same time every day. For example, you could follow this schedule **and limit yourself to 10-15 minutes**.

1. Upon arrival at the office: 8:00 am
3. Mid-morning: 10:30 am
4. After lunch: 12:30 pm
5. Afternoon: 3:30 pm
6. End of day: 5:00 pm

Turn Off Outlook's Notifications About Email

You see that little envelope in the bottom, right corner of your screen and you can almost hear it saying, "read me!" The constant notifications of new email are one of the primary distractions for most people. So, turn them off! It's amazing how more focused you can be when your computer isn't announcing incoming email every few minutes (or seconds). **File** ➔ **Options** (left side) ➔ **Mail** (left side) ➔ clear all of the boxes under Message Arrival.

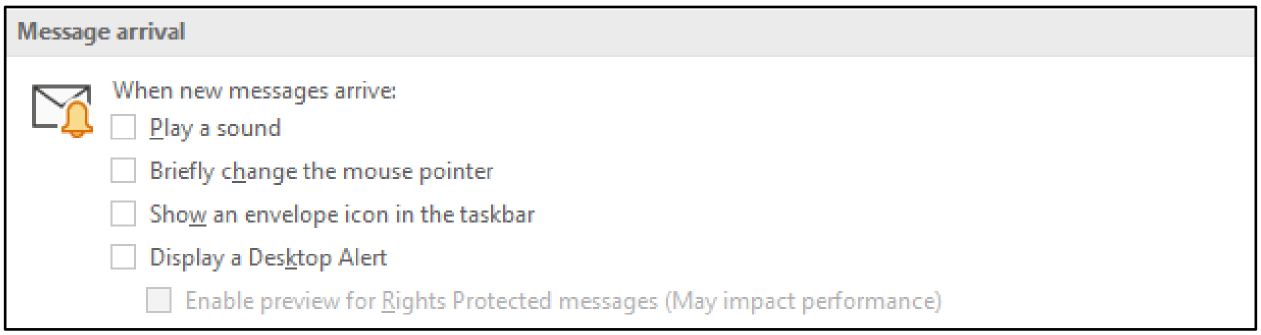

FIGURE 1-1

Treat Email Inbox like you U.S. Mailbox – Keep it Empty!

Would you ever keep your U.S. Mailbox in this condition? Of course, you wouldn't. So, don't let your inbox get that way! However, for most people, maintaining email is the weakest link in their system of organization primarily because of volume and frequency. They use it as a holding bucket for undecided and unresolved tasks.

The key to mastering your inbox is to keep it empty – or under 20. You certainly don't need to keep it at zero. In fact, if you tried, you would probably be wasting time, not saving time. Not to mention, you will also be developing bad obsessive/compulsive habits. Every time an email landed in your inbox, you would drop everything and try to deal with it. That would be horribly inefficient.

The truth is that to process email efficiently, you must be able to see your emails in a single screen (or close to it). It is very difficult and overwhelming to process emails and tasks when you are staring at a screen with 500 emails.

So, what do you do with your U.S. mailbox? One of the best time management/organization tips that I learned and implemented nearly ten years ago is this: Throw away your (U.S.) junk mail and advertisements before you get into the house. Only bring mail into your house that you intend to do something with!

Delete Whatever You Can Immediately!

Learn how to use the DELETE key. That could be the first thing that you do before you start dealing with email … just like not bringing junk mail and annoying advertising into your home. Delete the following:

- All the email that gets past your SPAM filter.
- Interoffice SPAM that is irrelevant to you.
- Jokes from annoying friends and c-workers.
- Email from people you don't like (unless it's important, of course)

TIP: Sort email based on the **From** field (by hitting the **From** column header). You can often get rid of tons of email sent from the same person. Remember that you can select a chunk of email by single left clicking on the first email – holding the Shift-key down and single left click on the last email.

If You Can Deal with It in Under 3 Minutes, Do It Now

The 3-minute rule is gold! Any email that can be responded to or dealt with (saved in a client file, forwarded, deleted, etc.) within 3 minutes should be dealt with immediately – the first time you lay eyes on it. This rule is based on the premise that the 2nd time you have to deal with the email, it will take you longer than 3 minutes navigate to it, open it, read it, comprehend it, re-familiarize yourself with the topic and then handle it. So, why not just respond to it if you have the 3 minutes to deal with it!

TIP: Don't forget that you may be able to deal with it more quickly by picking up the phone or walking around the corner.

Remember, you are still supposed to be handling these emails only at scheduled/set times during the day! This will be a difficult temptation to overcome – especially if you have email notification turned on and see an email that you can dispose of quickly.

Finally, if it is an email that is going to take a while, you should dispose of it in under 3 minutes by adding it to your task list (or calendar) and then saving it into the appropriate client/matter file.

Delegate If Appropriate

If someone else should be handling the task or issue in the email, then hand it off appropriately. Don't let someone else put "the monkey" back on you, in the words of *The One Minute Manager Meets the Monkey* by Kenneth Blanchard. Do this immediately unless it is going to take you more than 3 minutes to delegate. You can make this easy to track by setting up the Delegated Email rule described under Keep Track of Delegated Email on page 45 below.

Delay If Necessary

Already mentioned in the 3-minute rule above, if it is an email that is going to take a while, you should simply dispose of it in under 3 minutes by adding it to your task list (or calendar) and then saving it into the appropriate client/matter file.

- Do not use Outlook as your to-do list by leaving unresolved email in your inbox.
- If you keep a paper-based task list, simply write it in and save the email in appropriate place.

- If you use Outlook to manage your task list, simply drag it over to your **Task button** in the Outlook navigator.
- In some circumstances, it is okay to set up subfolders under your inbox. Clean them out on a weekly basis.
- If you schedule your tasks as appointments, add it to your calendar.

CHAPTER 2

OUTLOOK'S "FLUENT USER" INTERFACE

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Outlook is Organized into Folders

All items in Outlook are stored in Folders. Clicking on the navigation buttons in the bottom left Mail, Calendar, People, or Tasks changes the view to that folder.

Outlook 2013/16

To see all Outlook folders, click the **three dots** and choose **Folders**.

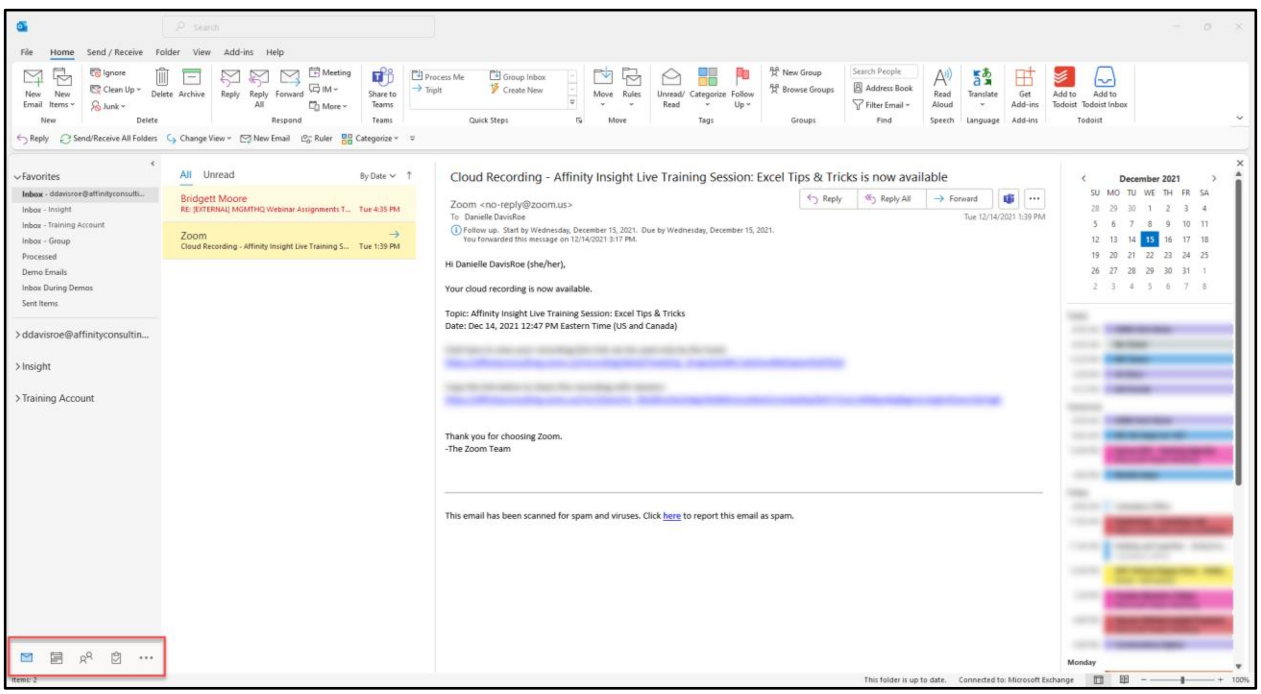

FIGURE 2-1

Outlook 2019/21/365

To see all of the Outlook folders, click on the **More apps button** and choose **Folders**.

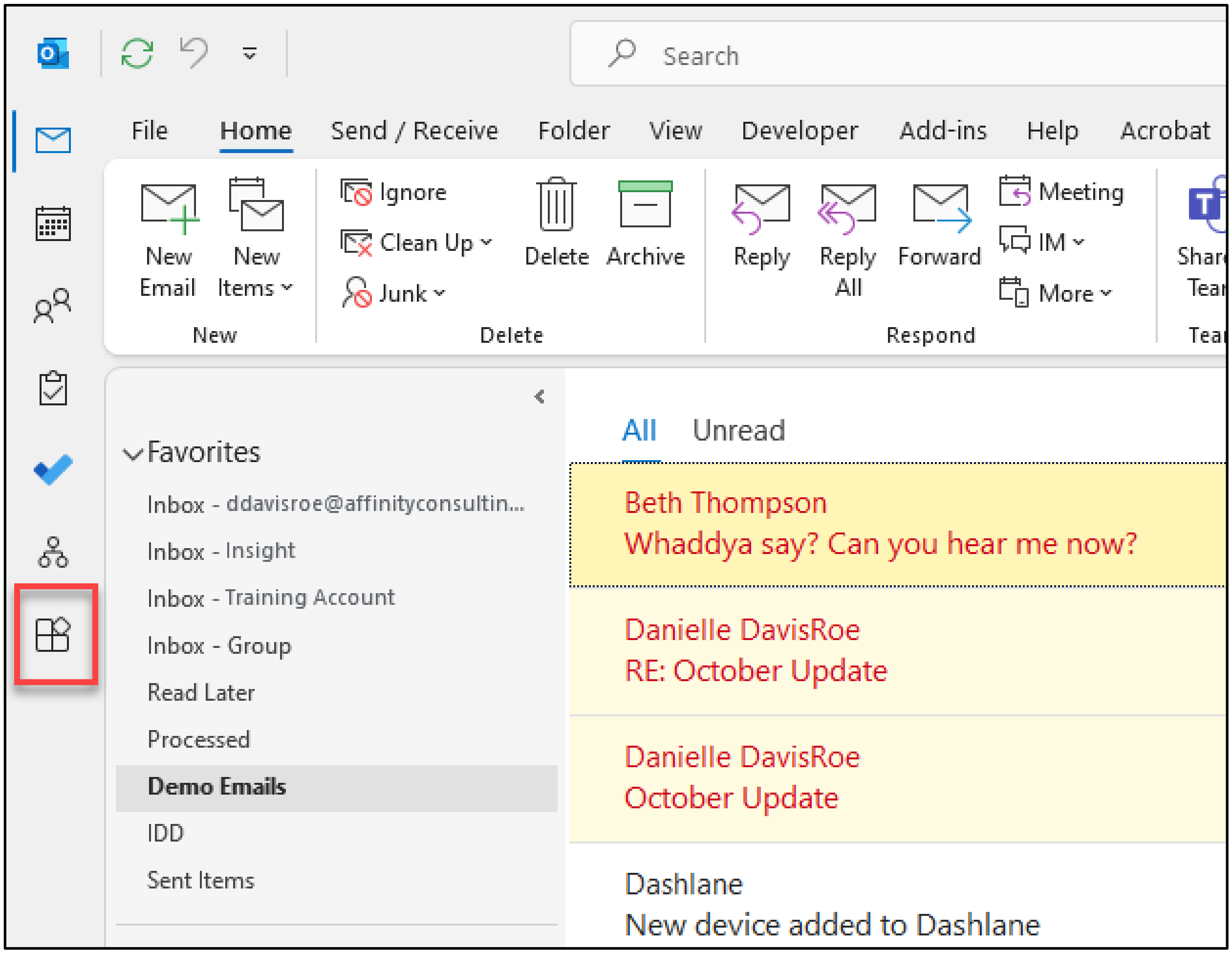

FIGURE 2-2

Opening Folders in New Windows

To open a folder in a new window, right-click on the navigation button, and select **Open in New Window**.

Quick Access Toolbar

Use and modify the Quick Access Toolbar ("QAT") to store your most frequently used commands. By default, the QAT is configured with a few commands.

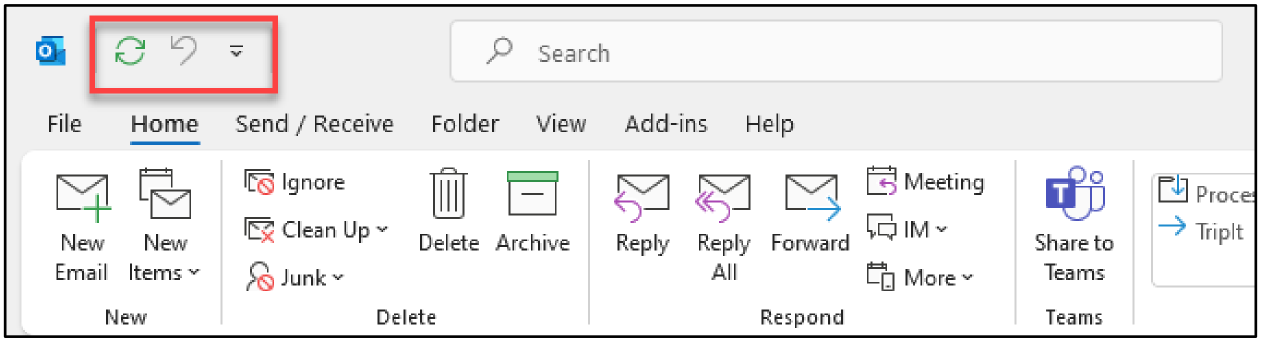

FIGURE 2-3

In 2019/21/365, the QAT is hidden by default. To show the QAT, right click on the ribbon and click on **Show Quick Access Toolbar**.

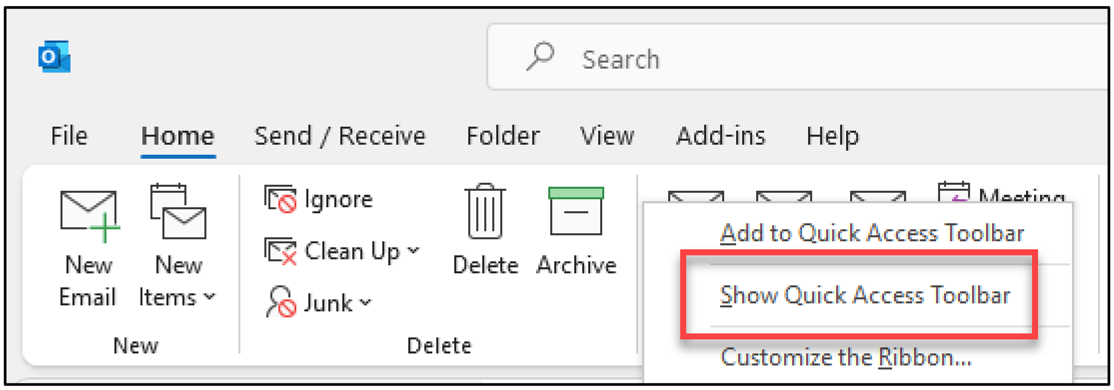

FIGURE 2-4

See page 18 for instructions on how to customize the QAT.

Tabs

The tabs are located at the top of the screen, immediately below the title bar. They change the ribbon.

Ribbon

The ribbons contain (almost) all of the commands that are used to work in Outlook. Each ribbon contains a group of related commands and functions. While many of the tabs are the same between email, calendar, and contacts, the ribbons are different.

Email Reading Pane

The Reading Pane shows emails in the main Outlook window without having to double-click on the email to open it.

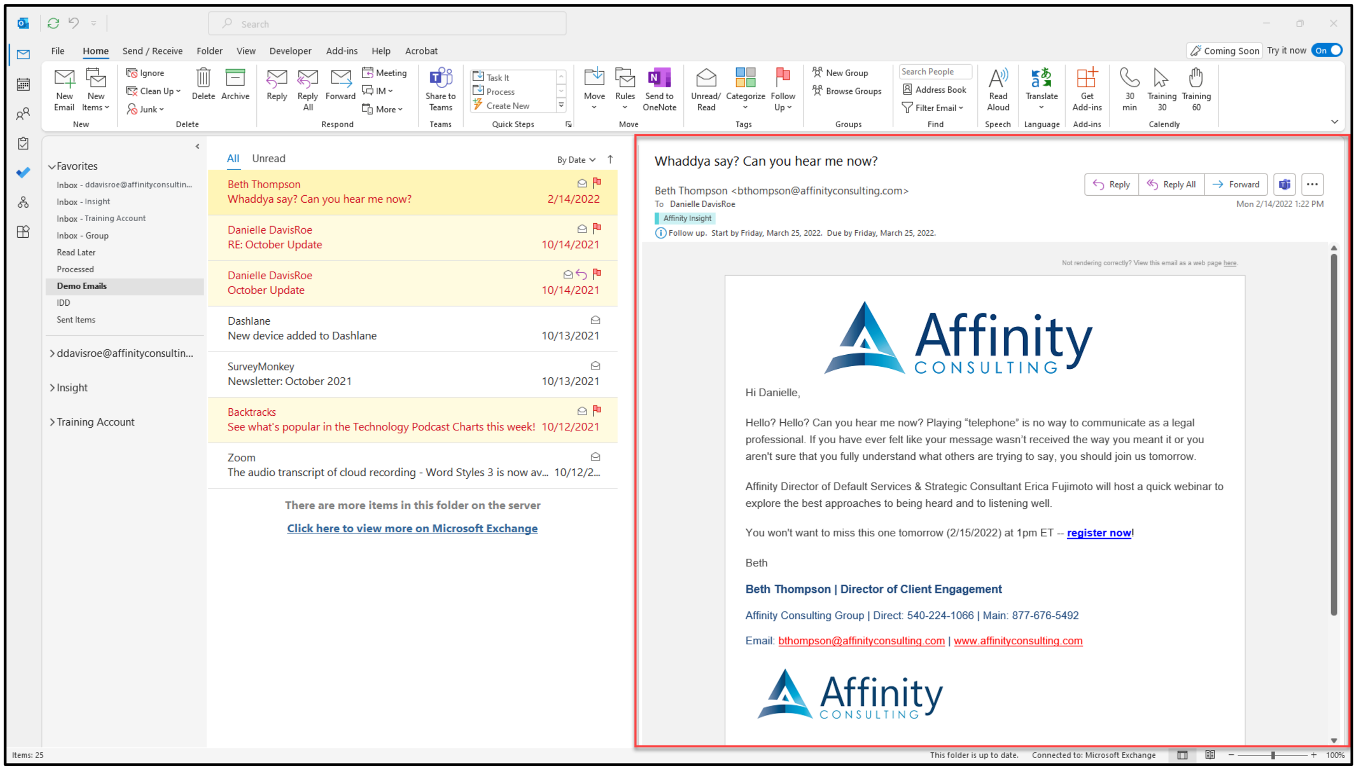

FIGURE 2-5

Convert One Type of Item to Another

For example, you can create a contact from an email by dragging the email onto the **Contacts button**. You can drag emails or tasks to the **Calendar button** to make appointments. If you drag emails onto buttons, it will leave the email where it was.

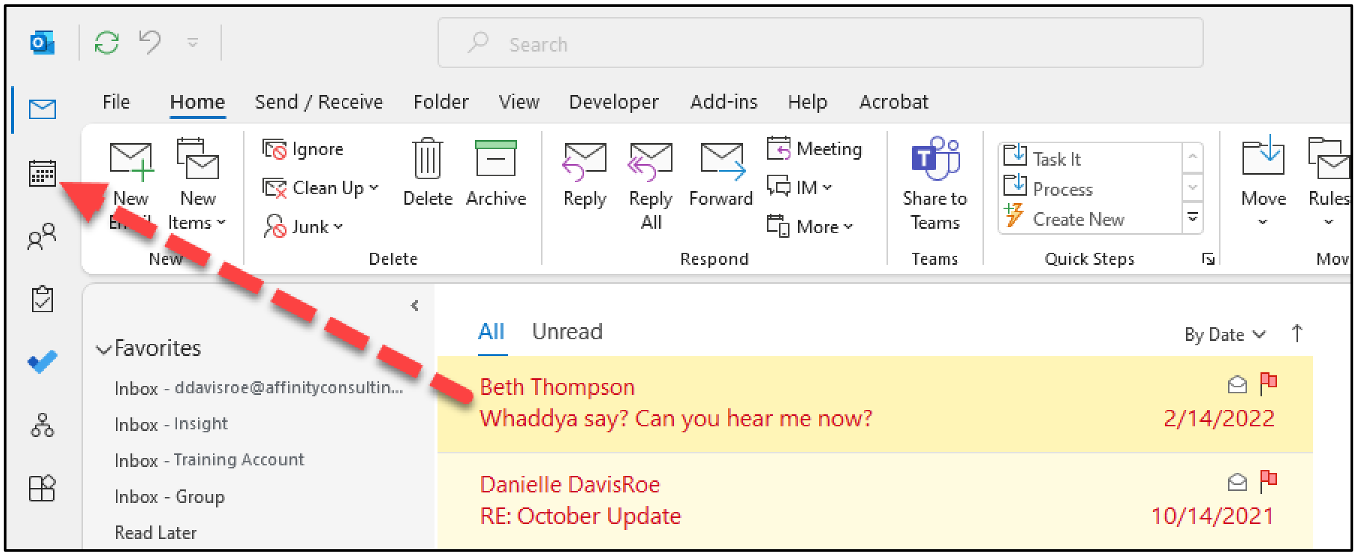

FIGURE 2-6

CHAPTER 3

DEFAULT SETTING CHANGES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

General Settings

This setting is found under the **File menu → Options → General**. Uncheck **Show Mini Toolbar** if you'd rather not the mini toolbar that popups when you select text.

Mail Settings

All of these settings are found under the **File menu → Options → Mail**.

Format

Under **Compose messages in this format**, select HTML.

Check Spelling Automatically

If you want Outlook to spellcheck your email before sending, under **Compose Messages,** check **Always check spelling...**

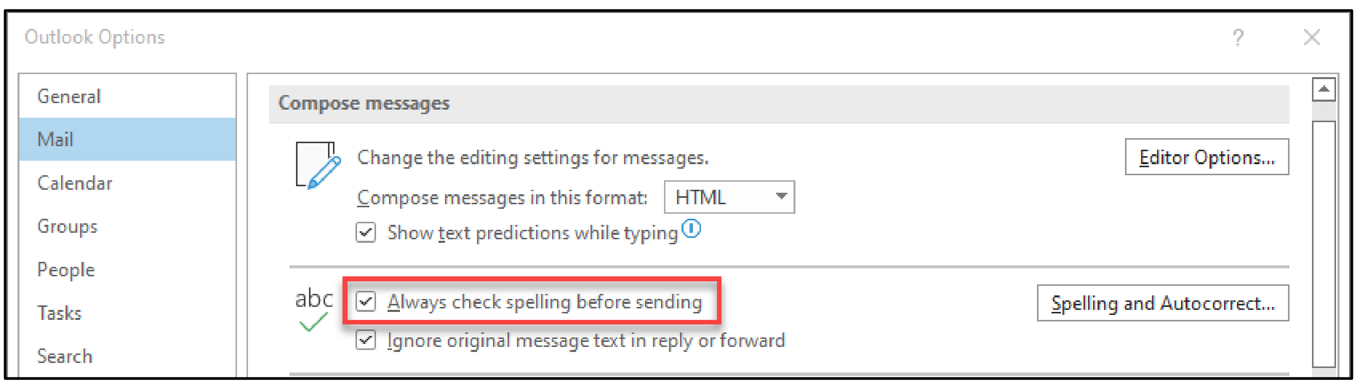

FIGURE 3-1

Click on the **Spelling and Autocorrect... button** and uncheck **Ignore Words in UPPERCASE**.

Set Up Your Signature

Under **Compose Messages**, click on the **Signatures... button** to setup your email signatures. It is recommended that you have an email signature automatically attached to every new message and every reply/forward. However, the reply/forward signature doesn't need to be as detailed as the one you use for new messages.

To create a new email signature:

1. Click on the **New button** to create a new email signature.
2. **Type a name for the signature** and click **OK**.
3. In the empty text box, create your email signature.

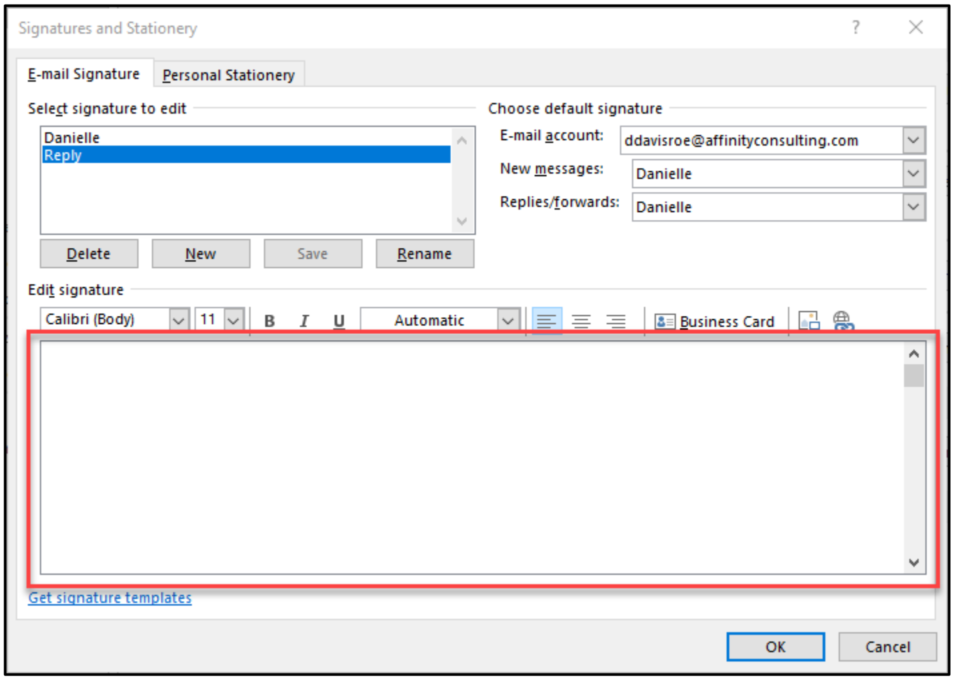

FIGURE 3-2

4. Click on the **Save button**.

To set your default email signatures for new messages and replies/forwards, select the desired signature under **Choose default signature**.

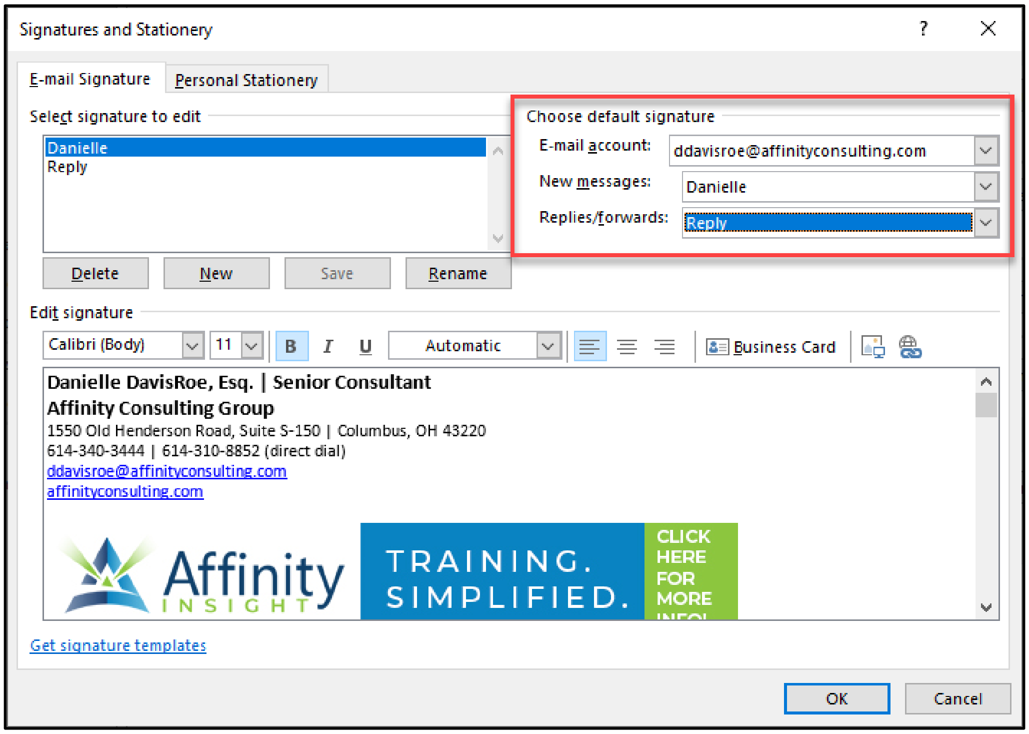

FIGURE 3-3

Default Fonts

Under **Compose Messages**, click on the **Stationery and Fonts... button**. New messages, replies/forwards, and plain text messages all have separate font settings. Click on the **Font... button** to change the default font for each message type.

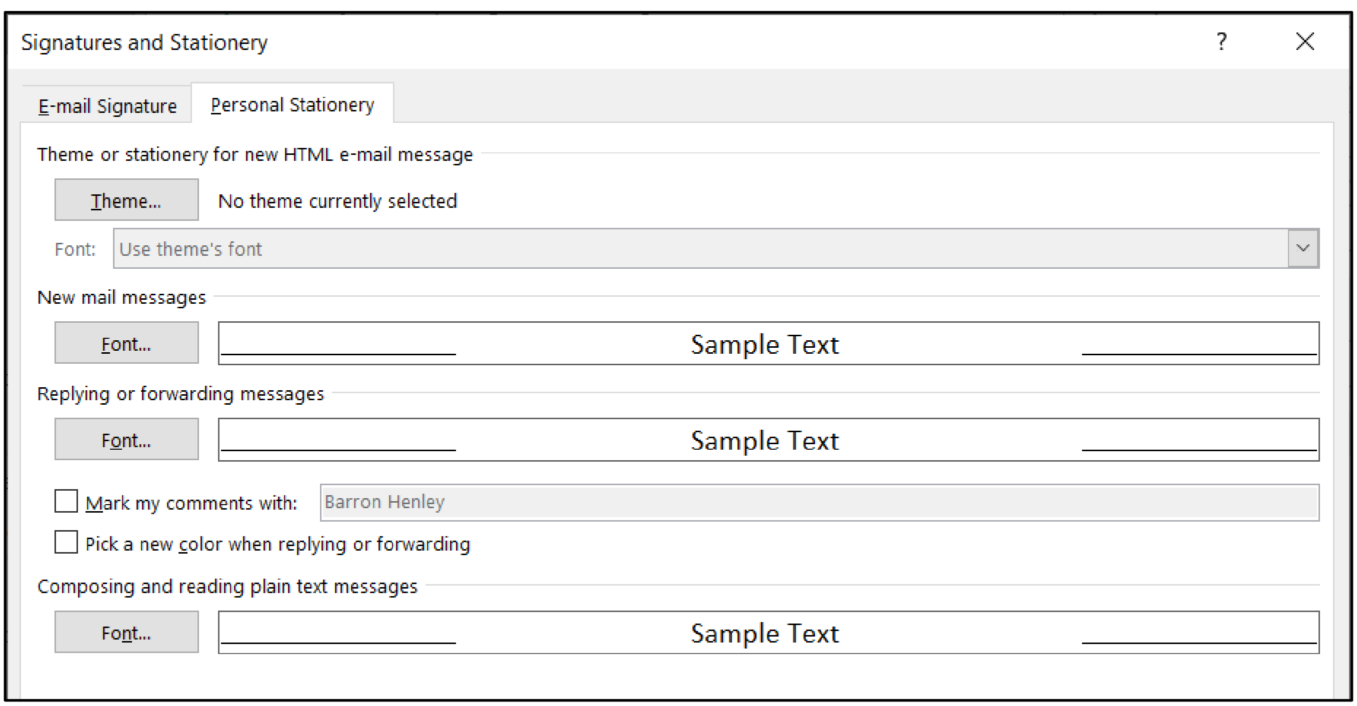

FIGURE 3-4

Stop Marking Emails as Read When Viewed in Reading Pane

By default, Outlook marks emails as read when they are viewed in the Reading Pane. To retain the unread status until emails are double-clicked to open, under **Outlook panes**, click on the **Reading Pane button**. Uncheck **Mark items as read when viewed in the Reading Pane** and **Mark item as read when selection changes**. Then click **OK**.

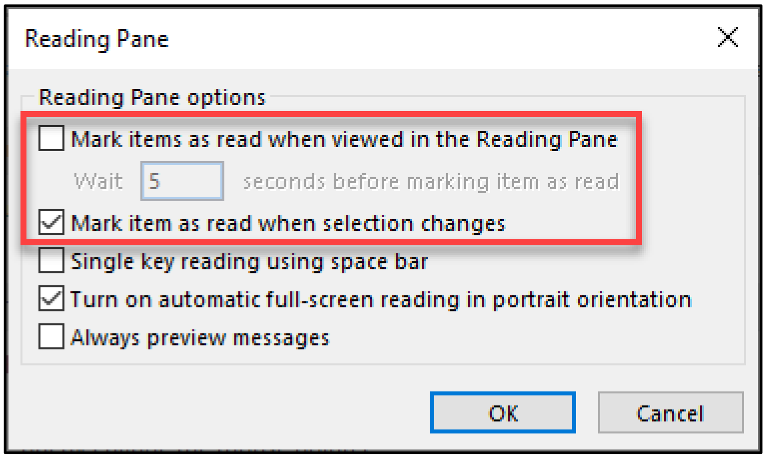

FIGURE 3-5

Turn Off Message Notifications

As described above, you can turn off email notifications and we strongly recommend that you at least try this. Under **Message Arrival**, uncheck all of the boxes.

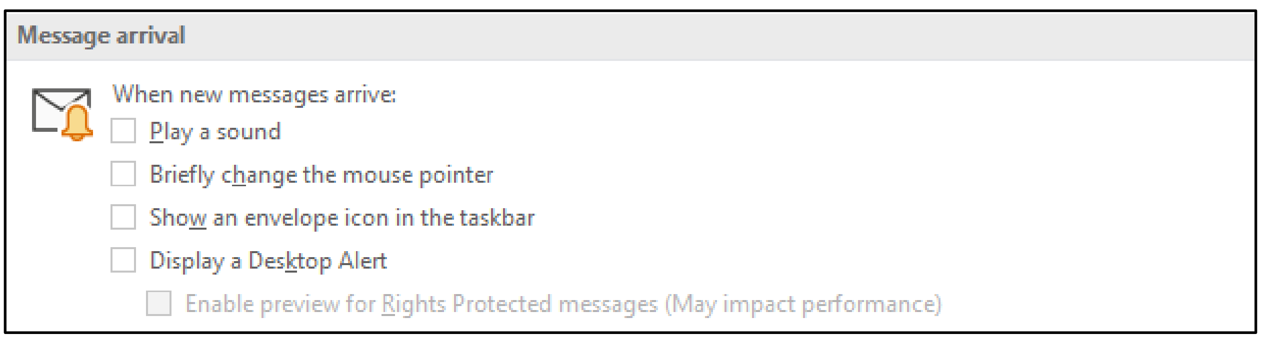

FIGURE 3-6

Automatically Open Replies and Forwards in a New Window

Depending upon what version of Outlook you have, when you click on the Reply or Forward button in the navigation pane, it may open the reply/forward in the reading pane rather than as a separate window. While you can click on pop-out to move the reply/forward out of the reading pane and into a new window, you can change your settings to do this automatically. Under **Replies and Forwards**, check the box to **Open replies and forwards in a new window**.

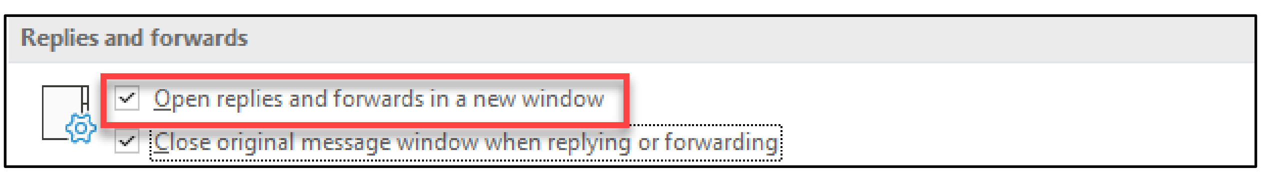

FIGURE 3-7

Close Original Messages When Replying or Forwarding

When replying to or forwarding an email that was opened in its own window (by double-clicking on the email), Outlook can automatically close the original email. Under **Replies and forwards**, check the box to **Close original message window when replying or forwarding**.

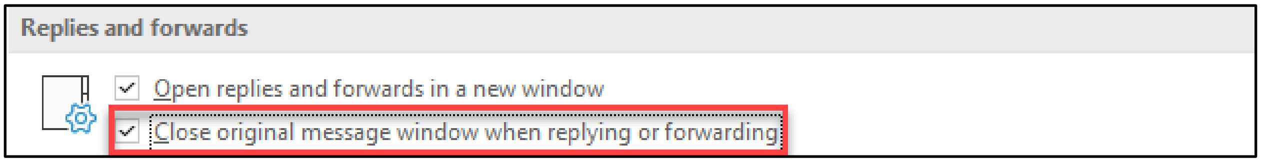

FIGURE 3-8

Mark Messages as Read When Deleted

If you dislike having a bunch of email in your deleted items identified as unread, check the box below under **Other**.

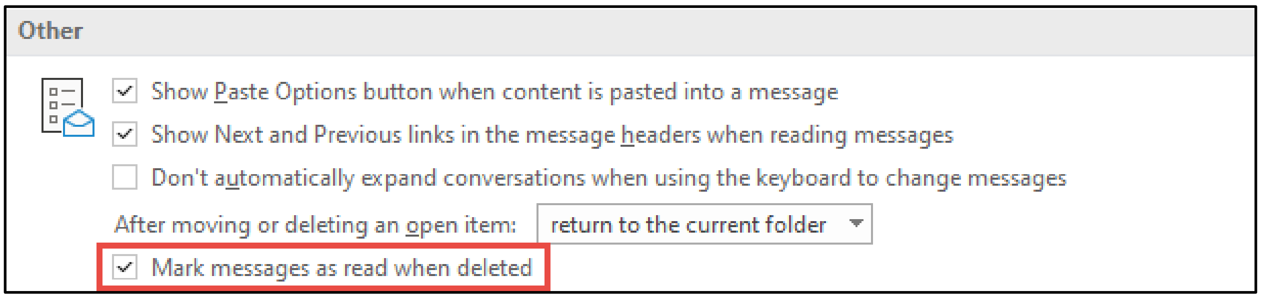

FIGURE 3-9

Calendar Settings

All of these settings are found under the **File menu → Options → Calendar**.

Change Work Start and End Hours

If you work different hours or days than Outlook's defaults, you can change them under **Work time**.

Default Duration for Appointments and Meetings

When adding a new appointment on your calendar, Outlook defaults to a 30-minute duration. You can change the default reminder time under **Calendar options**.

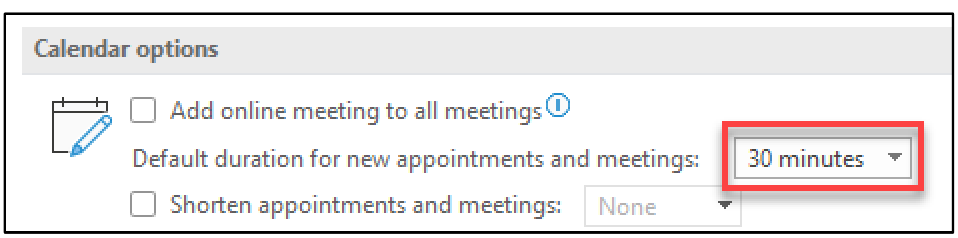

FIGURE 3-10

Default Reminder Timing

Outlook will add a 15-minute reminder to all calendar appointments by default. You can change the default reminder time under **Calendar options**.

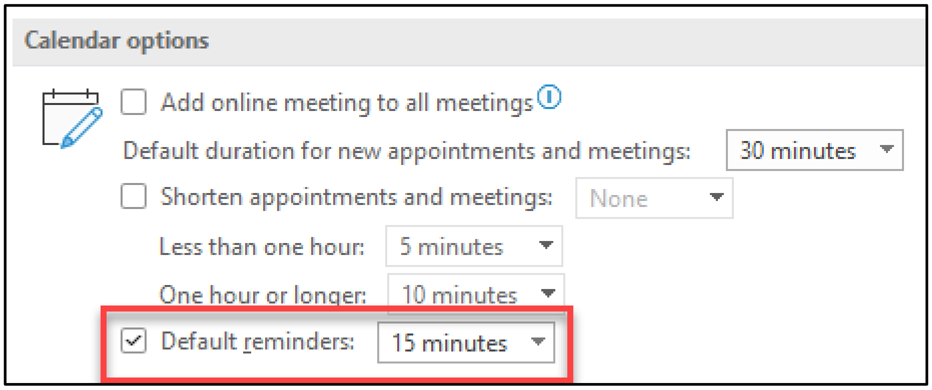

FIGURE 3-11

Change Calendar Color

To change the default color of your calendar, select a new color under **Display Options**.

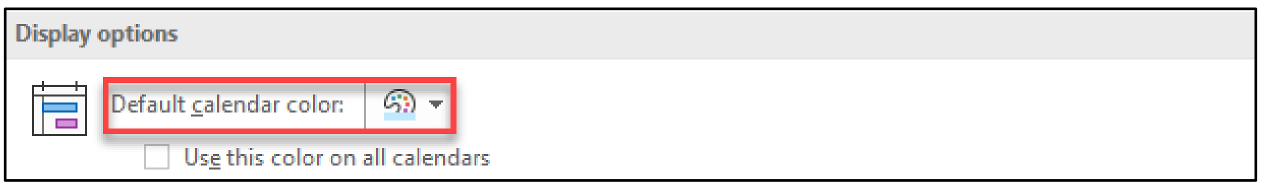

FIGURE 3-12

Show Multiple Time Zones in Your Outlook Calendar

Under Time Zones, you can add one or two additional time zones to your calendar (which will display side-by-side).

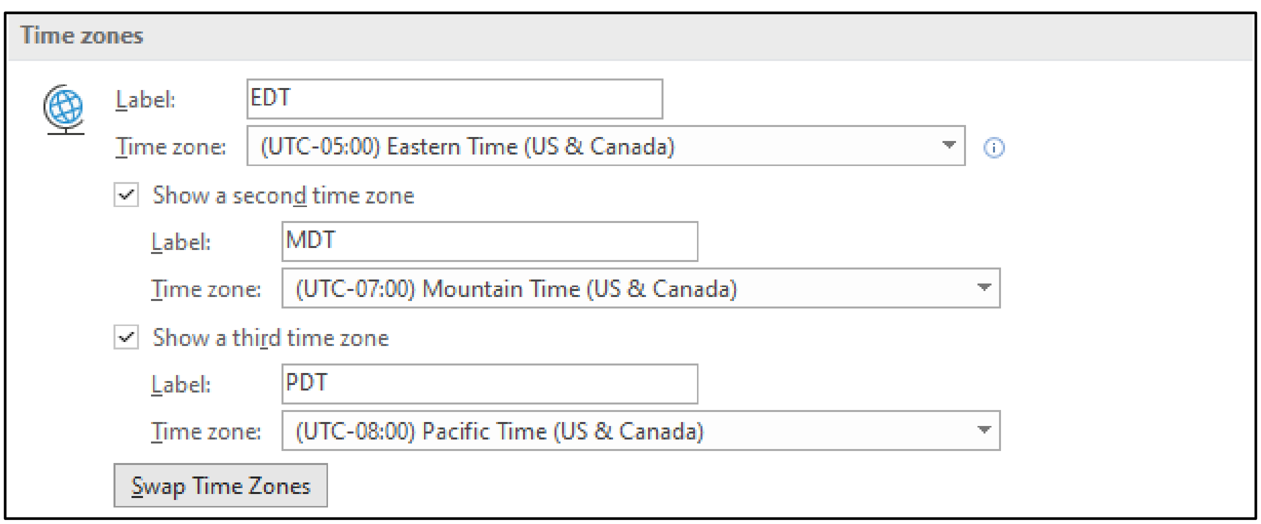

FIGURE 3-13

People Settings

This setting is found under the **File menu** → **Options** → **People**. We recommend using the settings below.

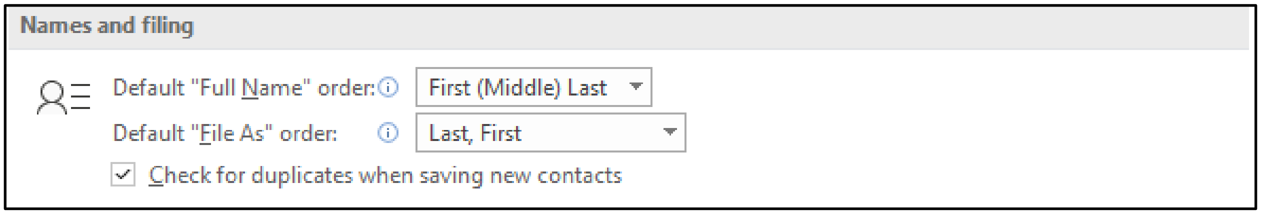

FIGURE 3-14

Advanced Settings

This setting is found under the **File menu** → **Options** → **Advanced**.

Change Your Reminder Sound and Avoid Missed Reminders

If you would prefer another sound as a reminder, you can make the change under **Reminders**. Furthermore, many people have missed reminders in Outlook because they can hide behind other applications. There's now a solution for that. Under **Reminders**, just check **Show reminders on top of other windows**.

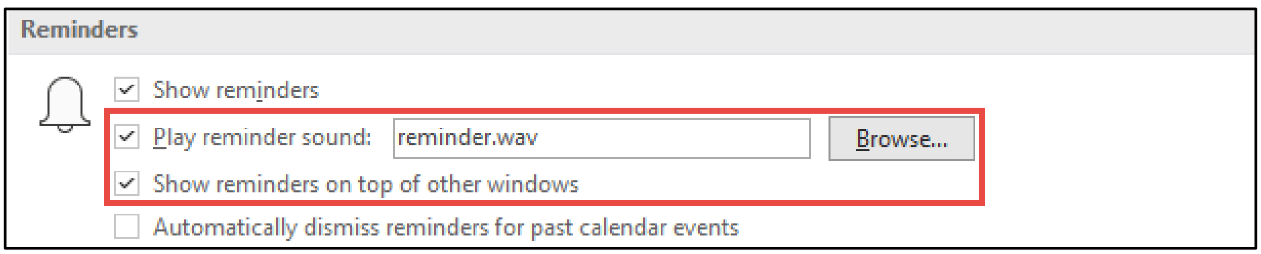

FIGURE 3-15

Changes to the Quick Access Toolbar

You can add commands through the Quick Access Toolbar ("QAT") menu by clicking on the icon on the right edge of the toolbar, then choosing **More Commands**. The menu contains items for the most common commands.

Select one of the common commands to add it to the toolbar. If your toolbar becomes too long for the top of the screen, right-click the **QAT**, and select **Show Below the Ribbon** to have it appear below the Ribbon. To add other commands or to change the order of the icons on the toolbar, select **More Commands...** to bring up the customize options (you can also get to this window from **File menu** → **Options** → **Quick Access Toolbar**).

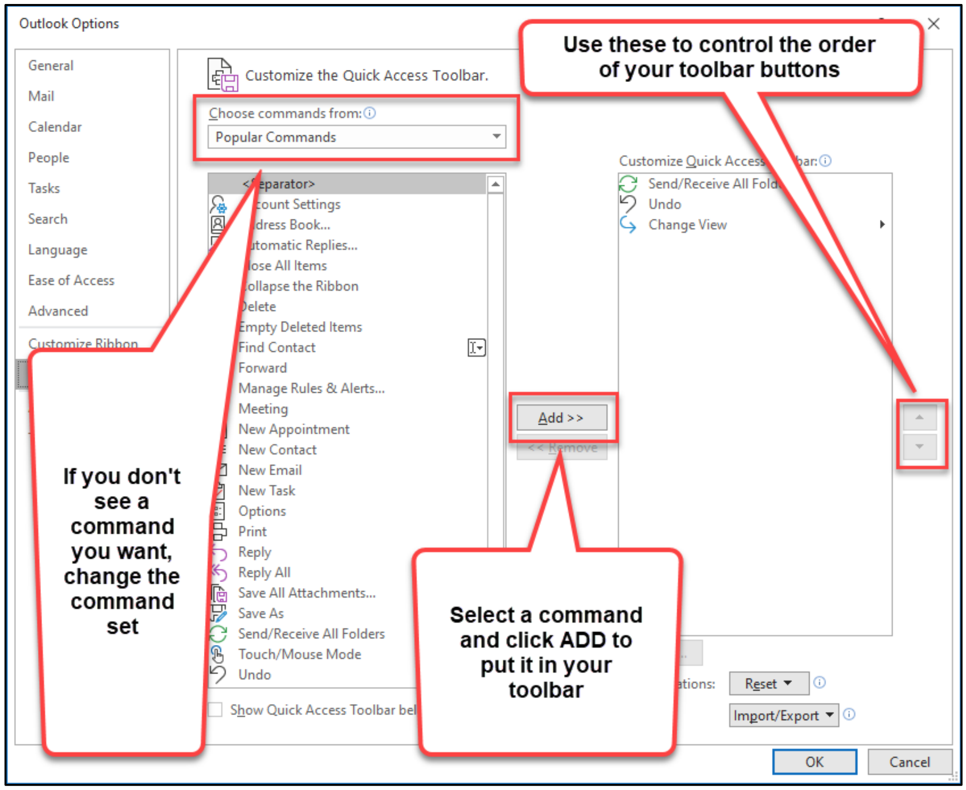
Outlook Options
General
Mail
Calendar
People
Tasks
Search
Language
Ease of Access
Advanced
Customize Ribbon
Customize the Quick Access Toolbar.
Choose commands from:
Popular Commands
Use these to control the order of your toolbar buttons
Customize Quick Access Toolbar:
Send/Receive All Folders
Undo
Change View
Add >>
<< Remove
If you don't see a command you want, change the command set
Select a command and click ADD to put it in your toolbar
Empty Deleted Items
Find Contact
Forward
Manage Rules & Alerts...
Meeting
New Appointment
New Contact
New Email
New Task
Options
Print
Reply
Reply All
Save All Attachments...
Save As
Send/Receive All Folders
Touch/Mouse Mode
Undo
Reset
Import/Export
OK
Cancel

FIGURE 3-16

CHAPTER 4

EMAIL: VIEWING AND READING EMAIL

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Reading Emails

Double click on an email message, or single click the message with the reading pane open, to read the email.

Emails with Attachments

Switch to viewing an attachment by left clicking on the attachment.

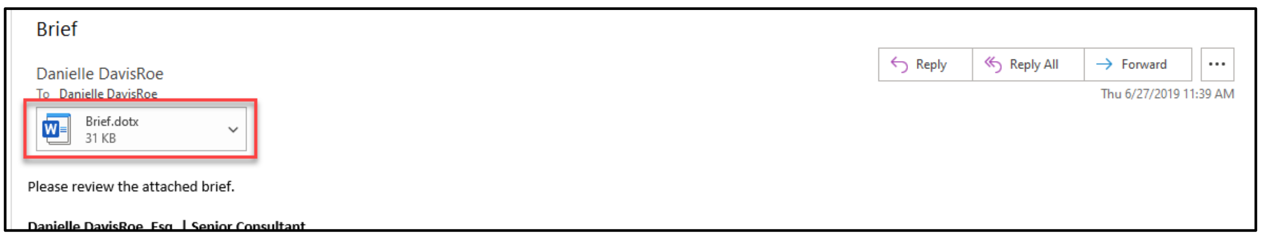

FIGURE 4-1

Switch back to the message by clicking on **Back to message**.

FIGURE 4-2

Conversations

To read emails as conversations, in the **View tab**, check the **Show as Conversations box**. This groups email messages in a chain of emails and displays them as an expanding list.

Ignore Button

****Warning** use this sparingly or not at all. Clicking this will automatically move all future emails in a thread to the deleted items.**

See More Email at Once

If you tend to have a lot of emails in your inbox, you may want to see as many emails on the screen as possible. If an email slides off the bottom of the screen, it is easy to forget about it. The changes below will maximize the number of emails you can see at once.

Reading Pane

If the Reading Pane is at the bottom of the screen, it takes up space that could otherwise show more email. To turn it off or move it, click on the **View ribbon → Reading Pane button → Off or Right**.

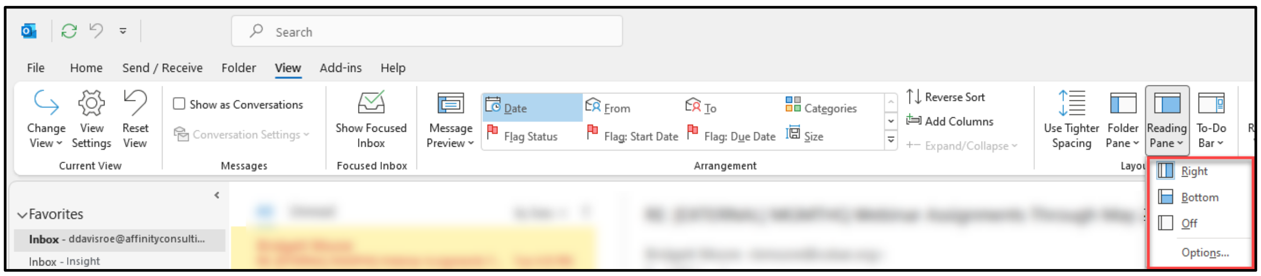

FIGURE 4-3

Date Grouping

By default, Outlook groups your email by date received. The date bars that run across your screen take up space that could be used to show more email.

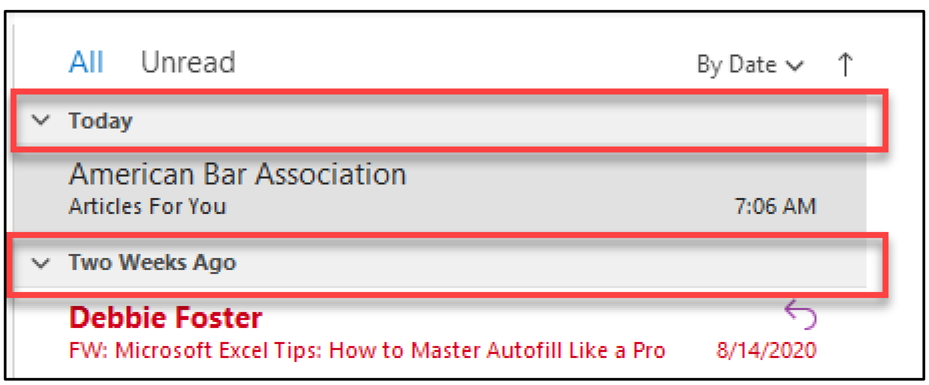

FIGURE 4-4

To turn it off the date bars, click on the **View ribbon → View Settings button → Group By... button → uncheck Automatically group** according to arrangement.

Message Preview

The message preview shows the first 1-3 lines of each email under the subject.

FIGURE 4-5

Turning off the message preview allows you to see significantly more email on one screen. To turn it off, click on the **View ribbon → Message Preview button → Off**.

Tighter Spacing (2021/19/365)

Using tighter spacing tightens up the spacing between emails, allowing you to see more emails at once. **View ribbon → Layout group → Use Tighter Spacing**.

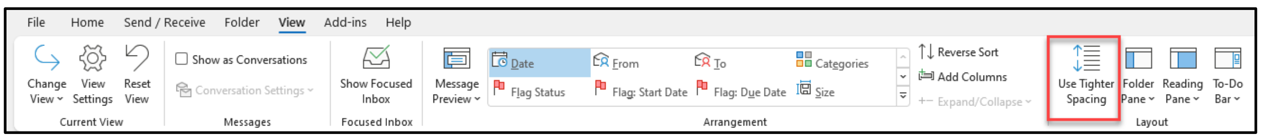

FIGURE 4-6

Compact Layout

If your email list is too narrow (either because your Outlook window is narrow or your Reading Pane is fairly wide), Outlook switches to the compact layout by default. The compact layout shows the sender in a larger font on the first line and the subject on the second line in a smaller font.

FIGURE 4-7

Turning off compact layout maximizing the number of emails you can see on one screen by moving the sender's name and the subject to the same line. To turn off compact layout, click on the **View Ribbon** → **View Settings button** → **Other Settings button** → Uncheck **Use compact layout...** → tick the radio button for **Always use single-line layout** → **OK button**.

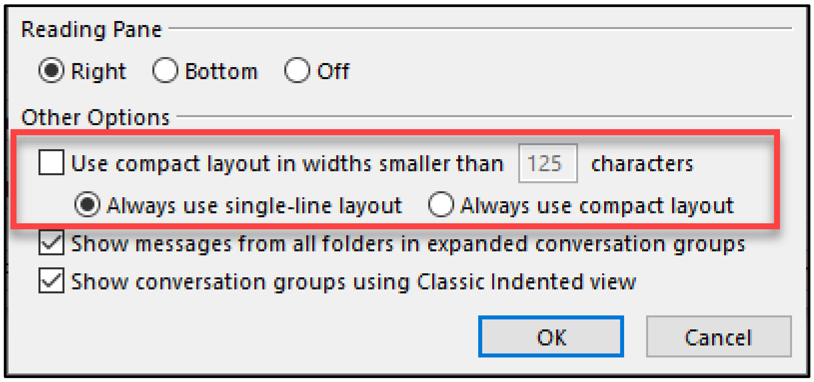

FIGURE 4-8

Compact Your Navigation Options (2016)

Outlook 2016 can use words at the bottom left corner of the email screen for allowing users to switch between functions in Outlook.

FIGURE 4-9

These words take up space that could be used to show more email. If you'd like to change the words to smaller icons, click on the ••• **button** adjacent to the big words → **Navigation options** → **check Compact Navigation** → **OK button**. This will convert the big words to little buttons as follows:

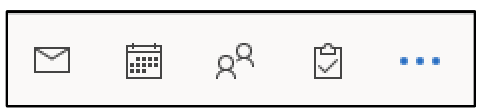

FIGURE 4-10

Unpin the Ribbon (2013/16)

Unpinning the Ribbon hides it when you are using it, allowing you to see more email at once. To unpin the ribbon, click on the ^ **icon** in the bottom right-hand corner of the ribbon.

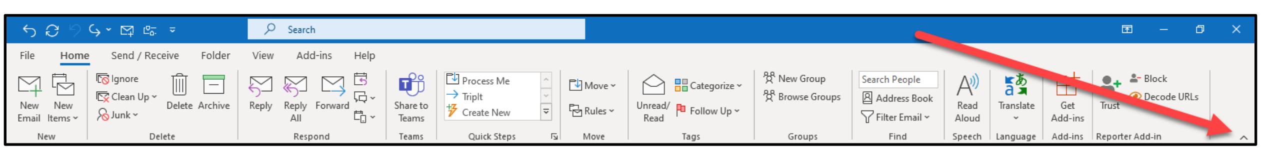

FIGURE 4-11

To open the ribbon back up, click on a tab:

FIGURE 4-12

To pin the Ribbon open again (so that it stays open), click on the **push pin icon**.

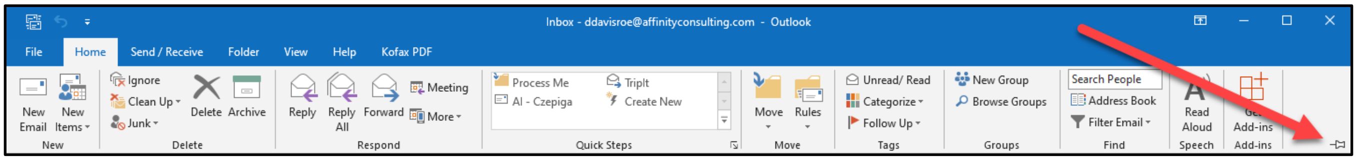

FIGURE 4-13

Simplified Ribbon (2019/21/365)

Click on the arrow in the bottom right-hand corner of the ribbon to switch between the classic and simplified ribbons.

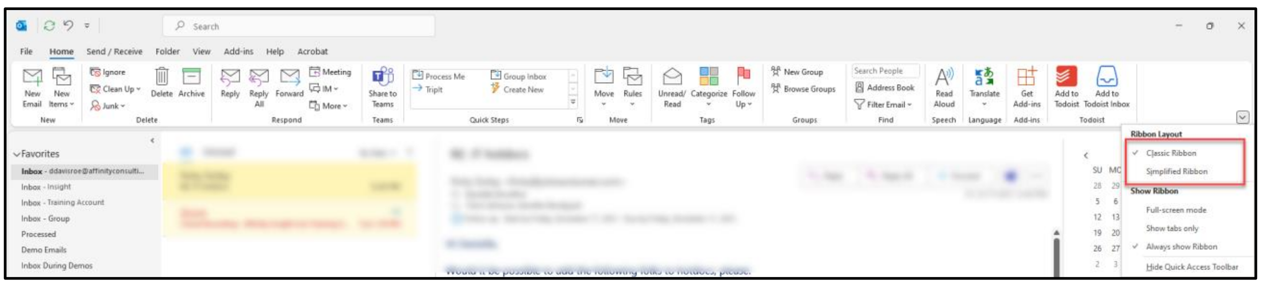

FIGURE 4-14

Columns

Columns are useful for seeing information about your email at a glance (such as the sender's name, the subject, and whether there is an attachment). Email can be quickly sorted based on the columns and you can customize the columns to meet your needs.

Add or Remove Columns

To add or remove columns, click on the **View Ribbon** → **View Settings Button** → **Columns... button**.

To remove columns:

1. Click on the column to be removed on the right side.
2. Click on the **< - Remove button**.

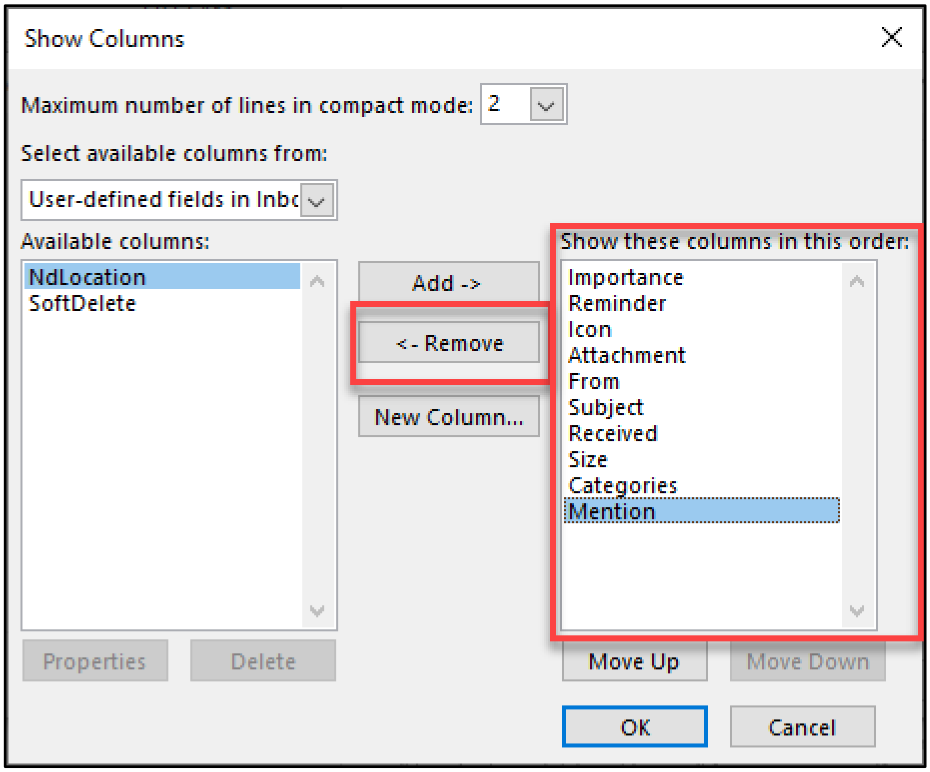

FIGURE 4-15

To add columns:

1. Click on the column to be removed on the left side.
2. Click on the **Add -> button**.

Reorder Columns

Reorder columns by click on the **View Ribbon → View Settings Button → Columns... button**. Use the Move Up and Move Down buttons on the left side.

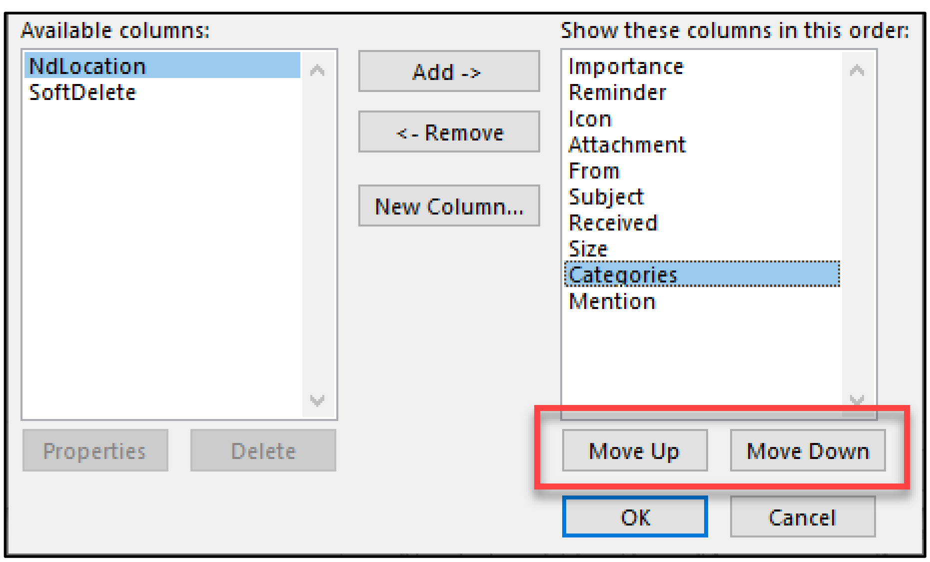

FIGURE 4-16

Sorting Email

Sort by Column

If you click on a column name, it will sort your email by that criterion. If you click the same column name again, it will sort in reverse order.

Sort by Arrangement

You can also change how email is sorted by clicking the appropriate buttons in the **Arrangement group** on the **View Ribbon**.

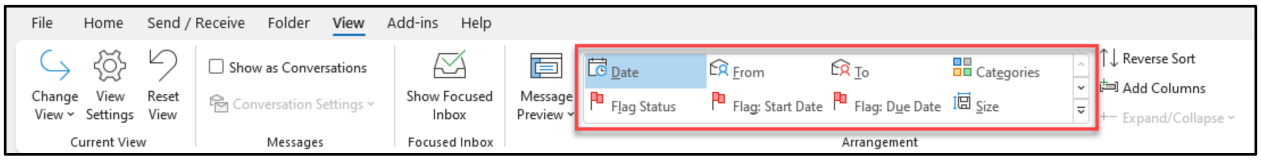

FIGURE 4-17

Filtering Email

All/Unread (2019/21/365)

Click on **Unread** at the top of your list of emails to quickly filter your inbox for unread emails only. Click on **All** to show all emails - whether read or unread.

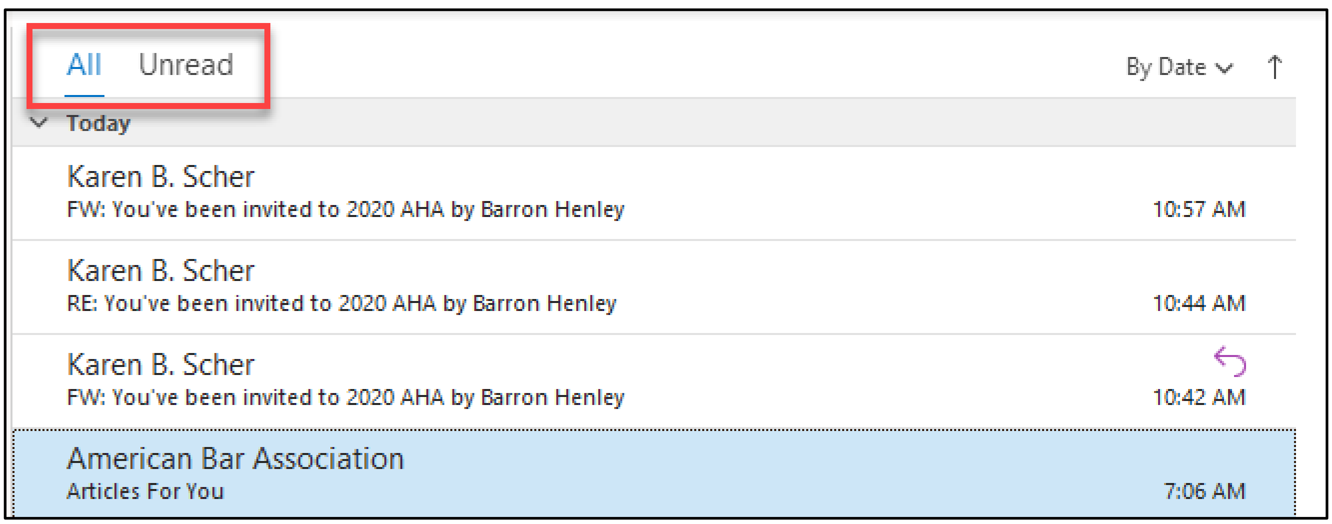

FIGURE 4-18

The All/Unread filters are unavailable if you are using the focused inbox. To turn off the focused inbox, open your inbox by clicking on the inbox in your folder pane, then go to the **View ribbon** and toggle off **Show Focused Inbox**. The button to toggle the focused inbox on and off only appears when you are in your inbox - it does not appear if any other folder is open.

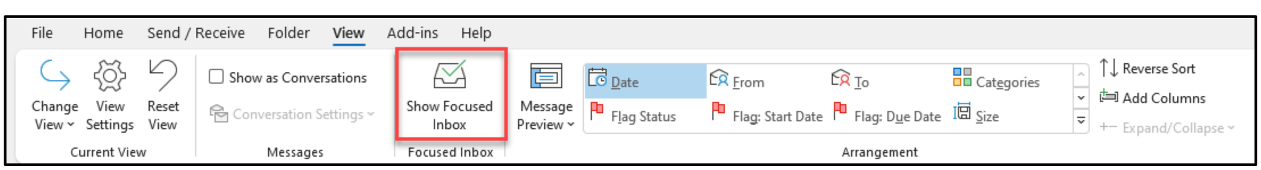

FIGURE 4-19

Focused/Other (2019/21/365)

The focused inbox filters email into two tabs: Focused and Other. Microsoft uses rules to determine where to place emails. To turn on the focused inbox, click on the inbox in your folder pane, then go to the **View ribbon** and toggle on **Show Focused Inbox**. The button to toggle the focused inbox on and off only appears when you are in your inbox - it does not appear if any other folder is open.

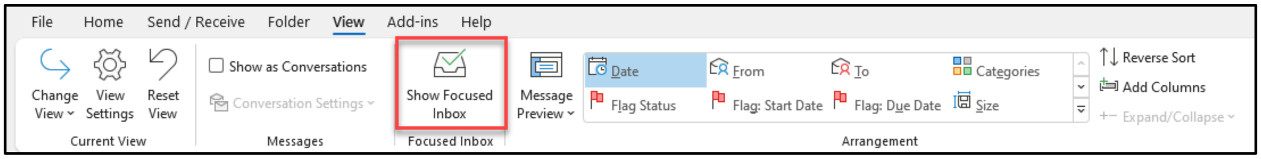

FIGURE 4-20

Click on **Focused** and **Other** at the top of your inbox to flip between the two inboxes.

FIGURE 4-21

You can move emails between the focused and other inboxes by right-clicking and selecting **Move to Focused** or **Move to Other**.

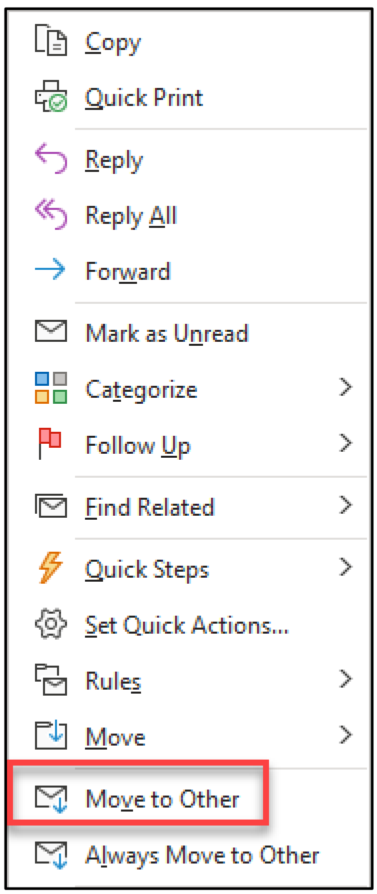

FIGURE 4-22

You can change the rules to always send emails from a particular sender to either inbox. Right-click on an email from that sender and select **Always Move to Focused** or **Always Move to Other**.

Conditional Formatting

Conditional formatting allows you to change the format of emails based upon certain conditions (for example, if the email is from a certain person or group of people, you could have those emails automatically turn red and bold the second they hit your inbox). The conditional formatting settings are found by clicking the **View Ribbon** → **View Settings button** → **Conditional Formatting button**.

Unread emails are blue and bold by default due to conditional formatting. To change how unread emails appear:

1. **View Ribbon** → **View Settings button** → **Conditional Formatting button**.
2. Select **Unread messages**.
3. Click on the **Font... button**.
4. Select the desired font, styles, size, and effects.
5. Click **OK**.

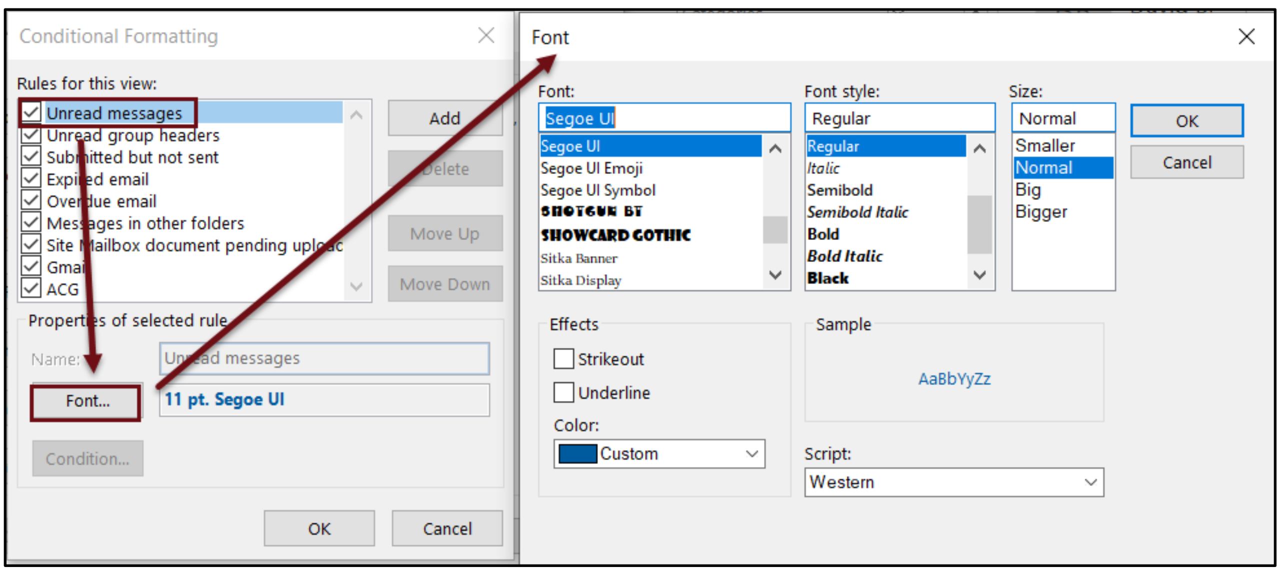

FIGURE 4-23

You can also create your own conditions, such as emails from a particular sender. Conditional formatting can be used to draw attention to emails from important senders.

1. **View Ribbon** → **View Settings button** → **Conditional Formatting button**.
2. Click on the **Add button**.
3. Name the condition.
4. Click on the **Font... button**.
5. Select the desired font, styles, size, and effects.
6. Click **OK**.
7. Click on the **Condition... button**.

8. On the **Messages tab**, enter the person's email address in the **From** box.

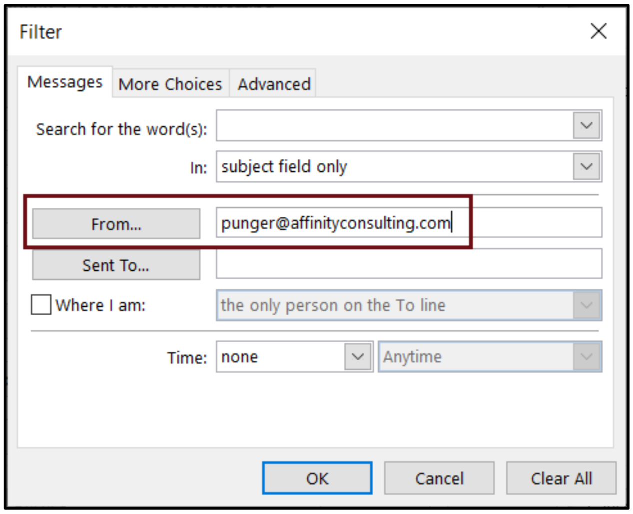

FIGURE 4-24

Folders

Email folders allow you keep your email organized. Legal professionals often create folders for clients or matters to keep related emails together.

Create Folders

To create a new subfolder under your Inbox:

1. Right-click on your Inbox and select **New Folder**.

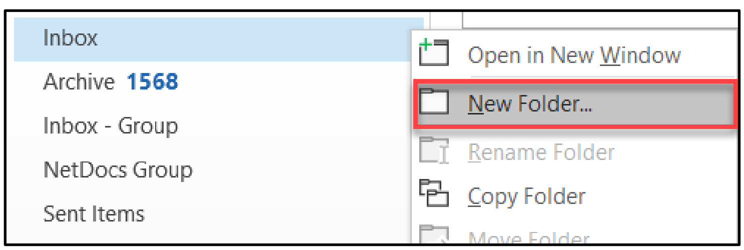

FIGURE 4-25

2. Give it a name.

To create a folder nested under another folder, right-click the name of the parent folder and select **New Folder**.

Reorder Folders

To reorder the folders, drag and drop them in the folders pane.

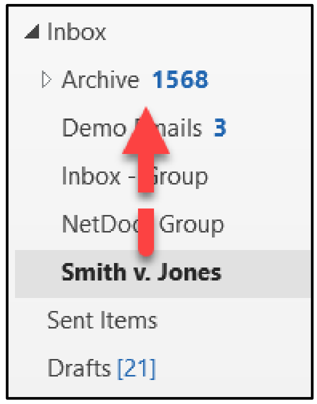

FIGURE 4-26

Managing Multiple Inboxes

You might have multiple inboxes if you have access to someone else's inbox, have access to a shared inbox, or have added additional email accounts (such as a personal email account) to Outlook. Managing multiple inboxes can be a bit tricky but gets a lot easier with favorites.

Favorites appear at the top of your Folder Pane. If you don't see them, enable them under **View ribbon → Layout group → Folder Pane → Favorites**.

Adding each inbox to your favorites will make them easier to access and help you notice when there are unread emails in them. Right-click on each inbox and select **Add to Favorites**.

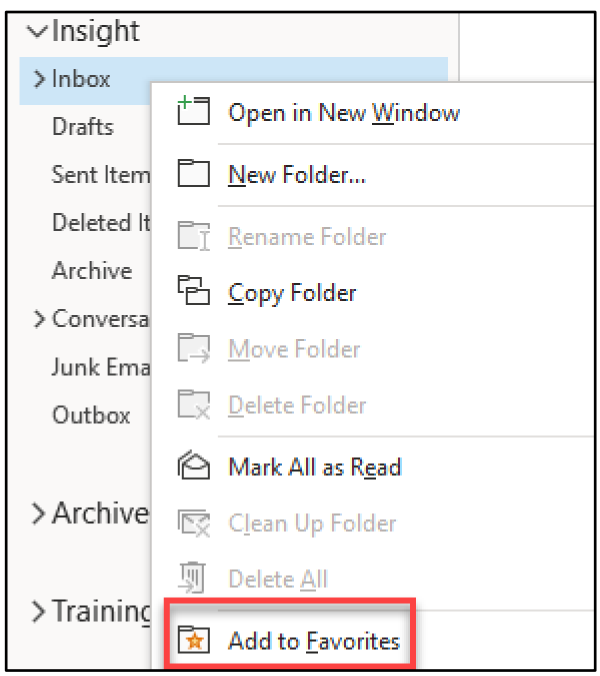

FIGURE 4-27

You can add any other folders that you frequently access to your favorites as well for easy access.

Right-Click Emails for All Possible Options

Right-click on an email to see a full range of options.

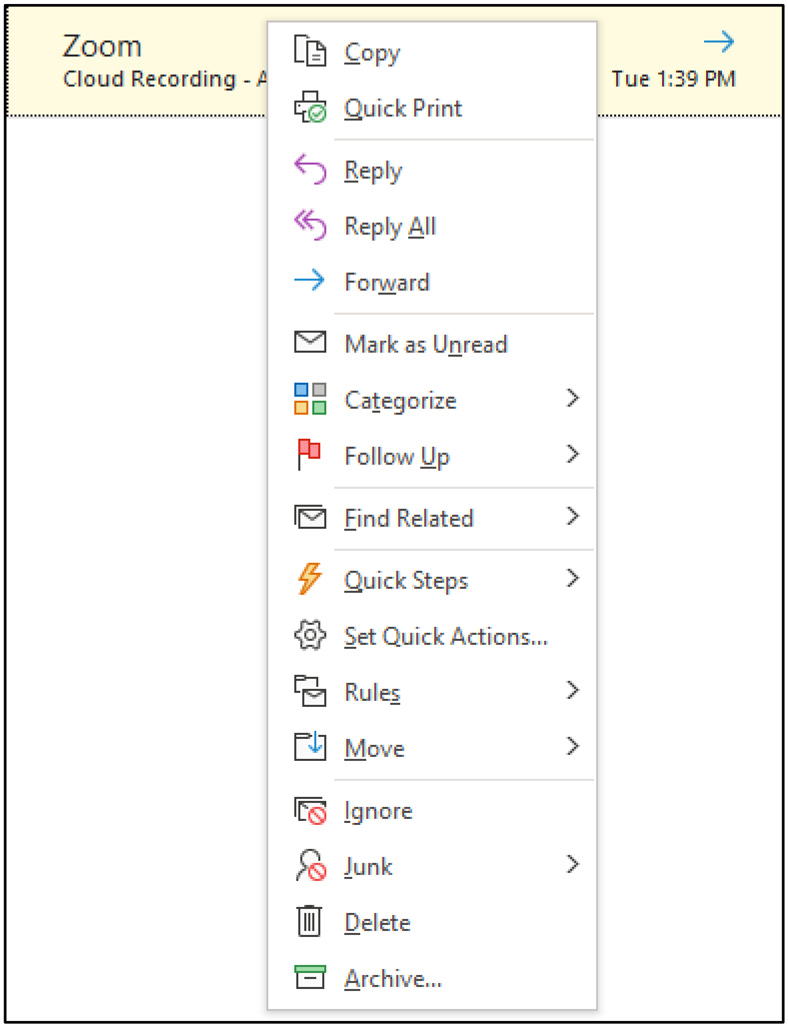

FIGURE 4-28

Add-In: Translate (2019/21/365)

Outlook 2019/21/365 can automatically translate emails.

To use Translate, on the **Home ribbon**, click on **Translate**.

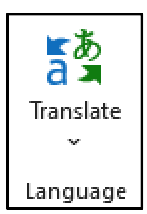

FIGURE 4-29

CHAPTER 5

EMAIL: SENDING EMAIL

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Types of Emails

New Messages

To start a new email message, on the **Home ribbon** ➔ **New group** ➔ **New Email button** (KS: Ctrl + N).

A blank email will appear with your default signature (if one is set up). To setup your default signature, see page 12.

Replies

There are two options when replying: Reply and Reply All. When replying to an email sent to you (regardless of whether you were included on the to, cc, or bcc line), Outlook will send the reply to only the sender of the email you are replying to. When replying all to an email sent to you, Outlook will send the reply to the sender and everyone who receive the email you are replying to (excluding anyone who was emailed using bcc).

If you reply to an email you sent someone else, the reply will go to you. However, if you use reply all, the email will go to everyone on the original email and Outlook will not copy you on your reply.

If there was an attachment on the email you are replying to, Outlook will not include the attachment on the reply. If you add new people to the email thread with a reply, they will not have access to the attachments to any prior emails in the thread.

Forwards

Use forwards to send emails and their attachments to people who were not copied on the original email. Forwards automatically include any attachments from the email being forwarded.

Recipient Fields

There are three recipient fields you can use when drafting an email: to, cc, and bcc. You can add more than one recipient to each field.

To

Use this for the main recipient(s) of your email - those you expect reply to your email.

Cc

Use cc (carbon copy) for anyone who needs to be kept in the loop, but you aren't expecting to reply to your email.

Bcc

Use bcc (blind carbon copy) to copy anyone on the email without others knowing they were copied on the email. If you don't see the bcc field, click on **Options → Show Fields → Bcc button**.

Edit The Auto-Complete List

Outlook stores a list of people you've emailed as an Auto-Complete list. When you start typing someone's name in a recipient field, Outlook gives you a list of options to choose from. You can remove people from that list by clicking on the X to the right of their name in the list.

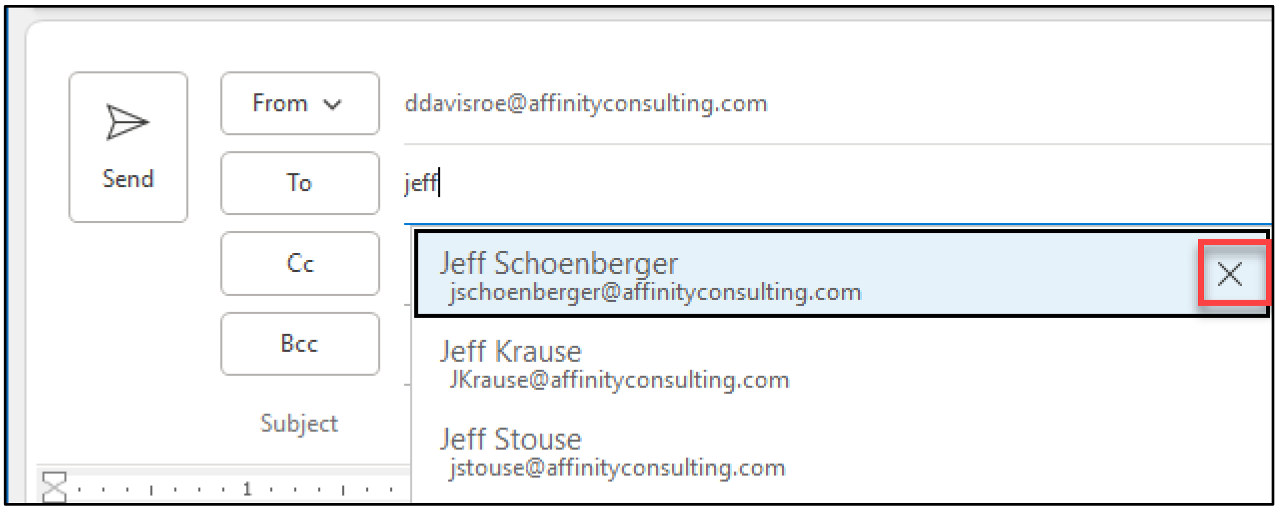

FIGURE 5-1

Changing Your Email Signature

Outlook automatically adds your default email signature default signature (if one is set up) to new emails, replies, and forwards. To setup your default signature, see page 12. You can set up additional email signatures and change email signatures as needed on an email-by-email basis. Right-click on your signature and select the desired signature from the list.

FIGURE 5-2

If you don't have a signature in your email, click on the **Insert ribbon** → **Include group** → **Signature button** to add a signature.

Email: Frequently Used Text

AutoText

AutoText provides an easy way to insert repetitive blocks of text into your emails quickly.

Accessing AutoText

When drafting an email message, AutoText is found at **Insert ribbon** → **Text group** → **Quick Parts button arrow** → **AutoText**. Adding it to your Quick Access Toolbar makes it much faster to access:

1. Click in the body of your email.
2. On the **Insert ribbon**, in the **Text group**, click on **Quick Parts**.
3. Right-click on **AutoText** and select **Add to Quick Access Toolbar**.

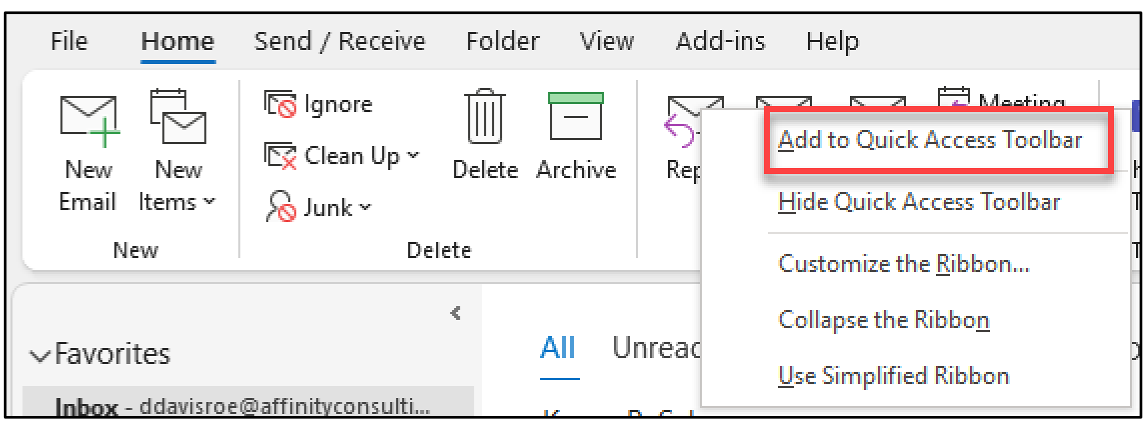

FIGURE 5-3

If you add AutoText to your Quick Access Toolbar, you can create AutoText or use existing AutoText from there.

Create AutoText Entries

1. Type the text you commonly re-use (or find it in an existing email).
2. Select (highlight) the text.
3. Click on the **Insert ribbon** → **Text Group** → **Quick Parts button arrow** → **Auto Text** → **Save Selection to AutoText Gallery**.
4. Give the AutoText entry a name and click **OK**.

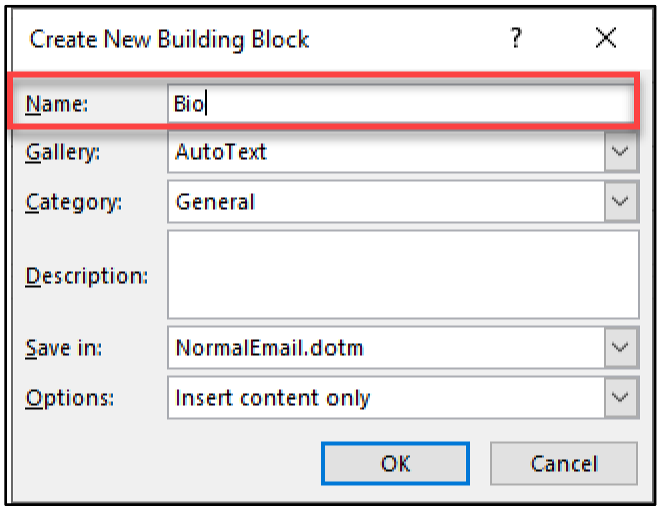

FIGURE 5-4

Use AutoText Entries

There are two ways to do this:

- Click the **Insert ribbon** → **Text Group** → **Quick Parts button arrow** → **Auto Text** → then click the appropriate AutoText entry.

or

- Type a few letters of the name of the entry→hit **F3** or **Enter.**

Add-In: My Templates (2019/21/365)

Use email templates to avoid having to re-write frequent emails. Some good use-cases include new matter request forms, sending instructions to a client, directions to your office, etc. They aren't super sophisticated, but they are very easy create and helpful!

Create Templates

To create an email template:

1. Create a blank new email.
2. Select **View Templates** from the **Message** ribbon.

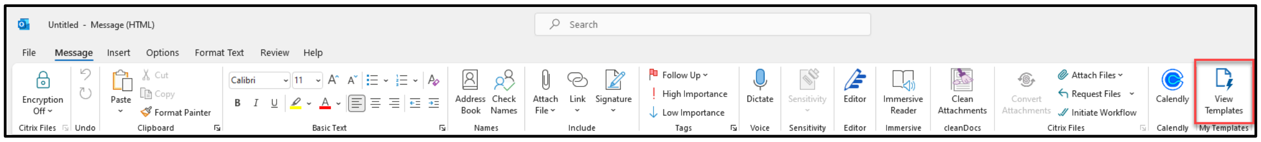

FIGURE 5-5

3. Scroll to the bottom and select **+ Template.**

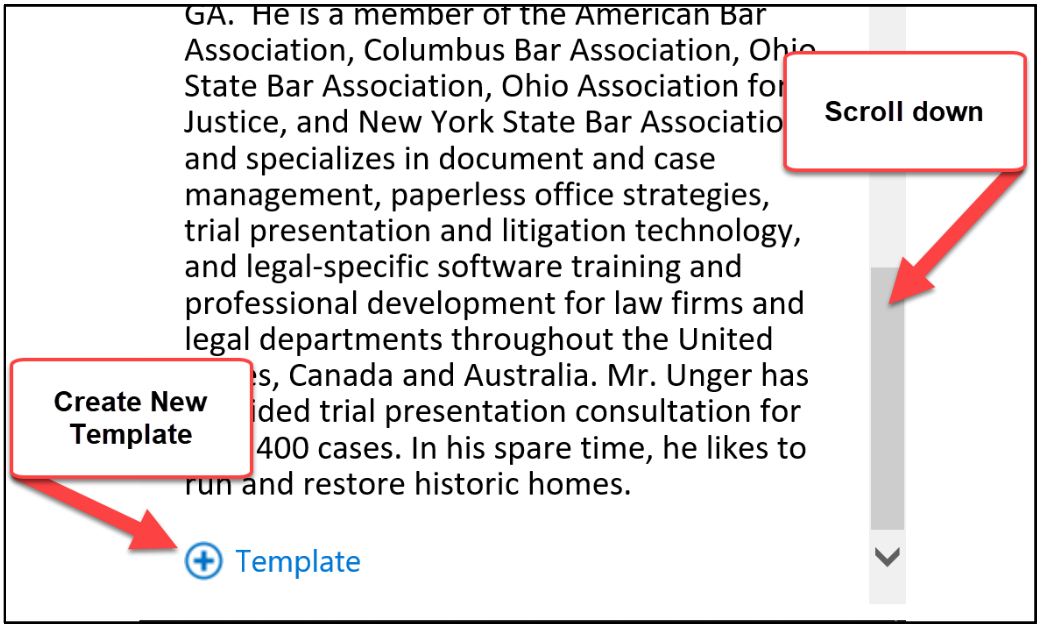

FIGURE 5-6

4. Name the template in the first field and paste your desired text in the second field and hit **Save**.

Use Templates

To use/apply your email template, open a new email, select the **View Templates** button, and simply left click on the desired template.

Email: Out of Office Replies

Outlook can automatically respond to any email messages you receive with an automatic reply. Be warned that if you receive email from a listserv, this may be a problem because every time someone sends a post to the listserv, everyone on the listserv is going to get your out of office message.

Manage Automatic Replies

To manage your automatic reply to anyone who contacts you while you are out of the office, go to **File menu → Info (left side) → Automatic Replies button**.

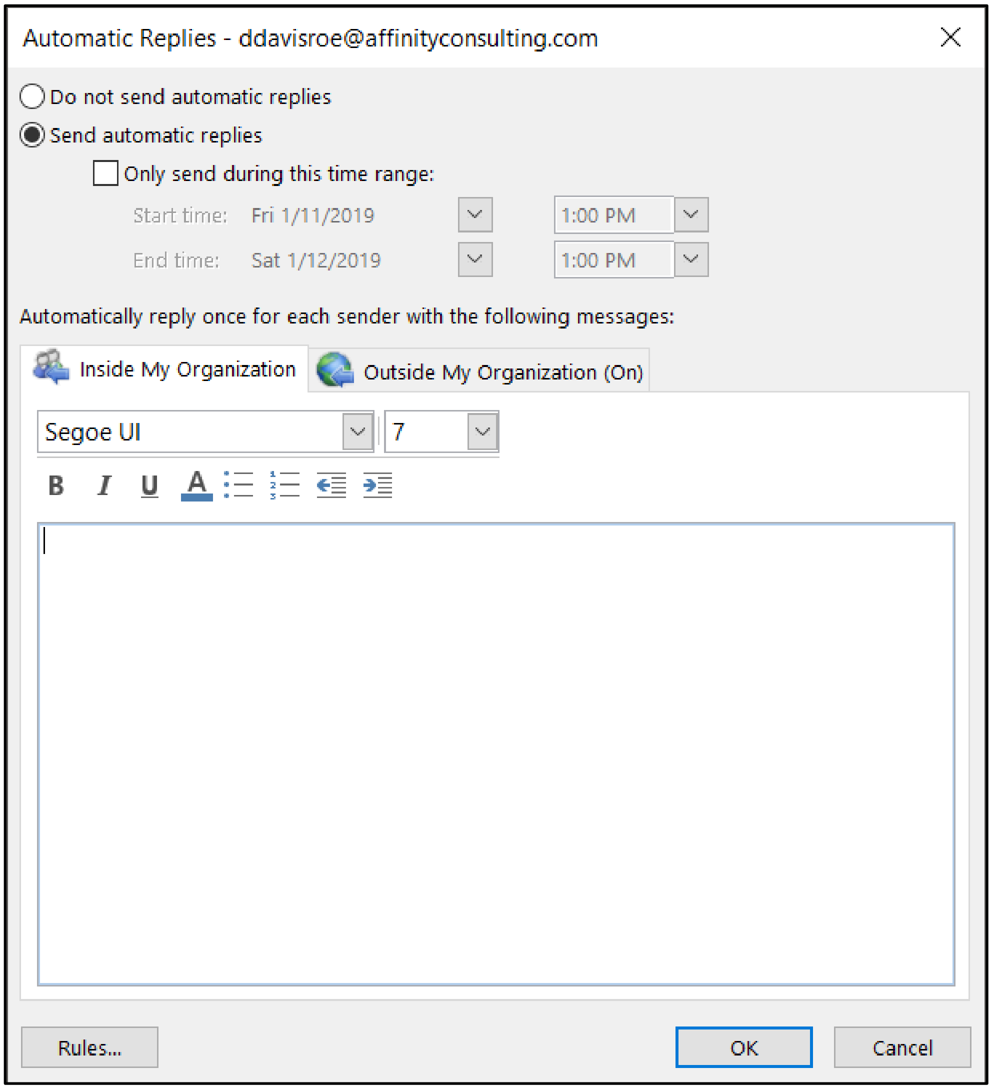

FIGURE 5-7

Turn On Automatic Replies

Click on the radio button next **Send automatic replies** to turn on automatic replies. By default, automatic replies turn on immediately and you must manually turn them off. To set it and forget, check the box to **Only send during this time range**. You can then select the start and end times.

Turn Off Automatic Replies

When automatic replies are turned on, Outlook will show a yellow bar across the top of your email. To turn off the automatic replies, click on the **Turn Off button**.

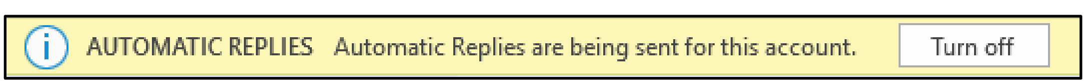

FIGURE 5-8

Attachments

To add an attachment, either click the attachment button or drag and drop the attachment into the email.

Always save the attachment first before editing. Double clicking the attachment and opening it from Outlook creates a **temporary** copy of the file. If you edit the file and just click "save" (as opposed to "save as"), the changes will only be saved to the temporary file. You may or may not be able to recover those changes later.

Polls (2019/21/365)

Polls can be used to quickly collect information from email recipients using simple Microsoft Forms.

Creating Polls

To create a poll in an email message:

1. On the **Insert ribbon**, click on **Poll**.
2. In the **Poll panel**, add your question and options.

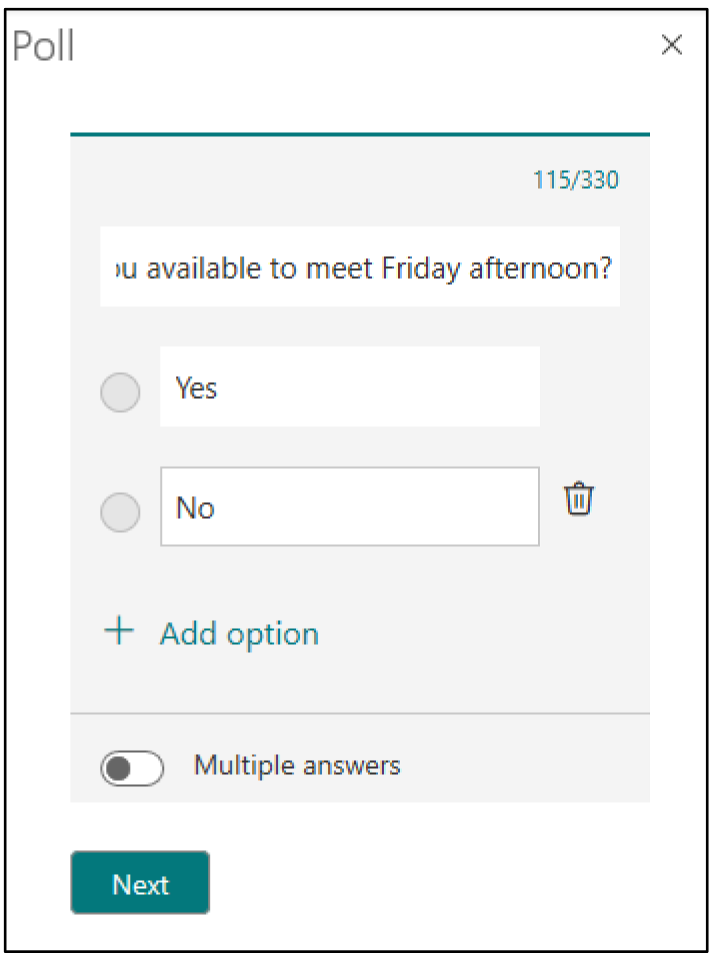

FIGURE 5-9

3. Click **Next**.
4. Click on **Add to email**.

Responding to Polls

The poll recipients can respond to the polls by click on an option and clicking on the **Vote button**.

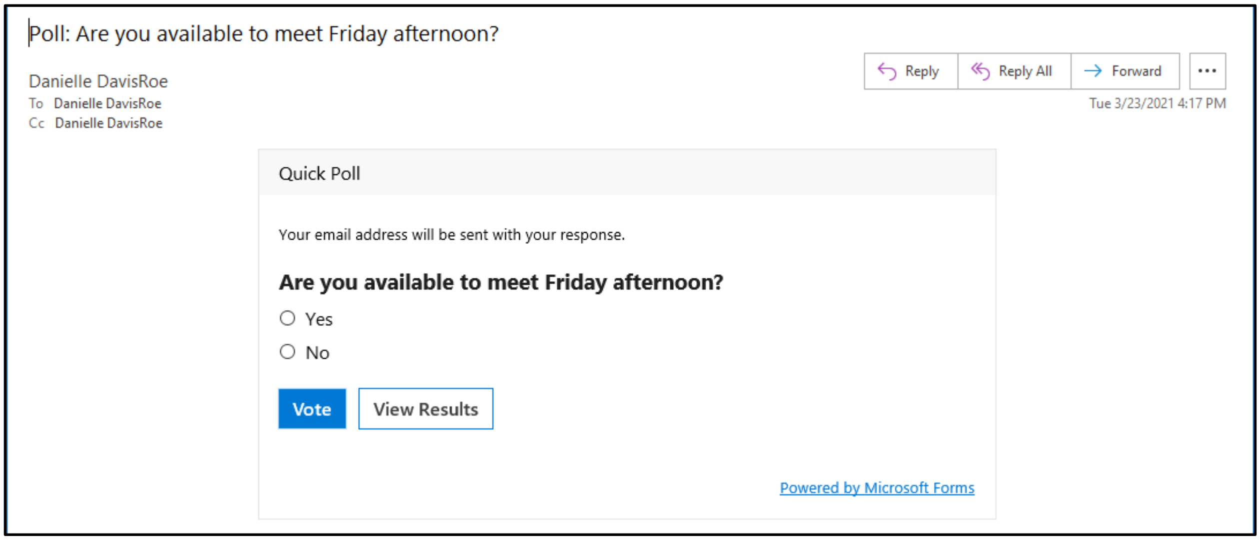

FIGURE 5-10

Viewing Responses

Open the email with the poll and click on **View results** to see the responses.

CHAPTER 6
EMAIL: RULES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Rules automatically take actions when certain conditions are met. For example, rules can be used to auto-file incoming email into specific folders. Rules are very powerful and can save you a lot of time. However, because they happen automatically, you need to be careful about creating rules that make it so you may miss incoming emails.

Rule Parts

Rules have 3 parts:

- **Condition** (Optional): Use conditions to determine when to the apply the rule. If no conditions are set, the rule is applied to every incoming email. Conditions include things like emails from particular senders, with particular subjects, sent only to you, and with specific words in the email. <u>If no conditions are set, the rule will be applied to every incoming email.</u>
- **Actions**: The action is what happens when the condition is met. Actions include things like moving to a specified folder, categorizing the email, deleing the email, forwarding the email, and flagging the email.
- **Exceptions** (Optional): Exceptions to the conditions prevent the rule from being applied to certain emails. Exceptions include things like emails from particular senders, with particular subjects, sent only to you, and with specific words in the email.

Rules Wizard

The Rules Wizard walks you through creating simple rules based on templates.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click on the **New Rule** button.
3. Select the desired template and click on the **Next > button**.

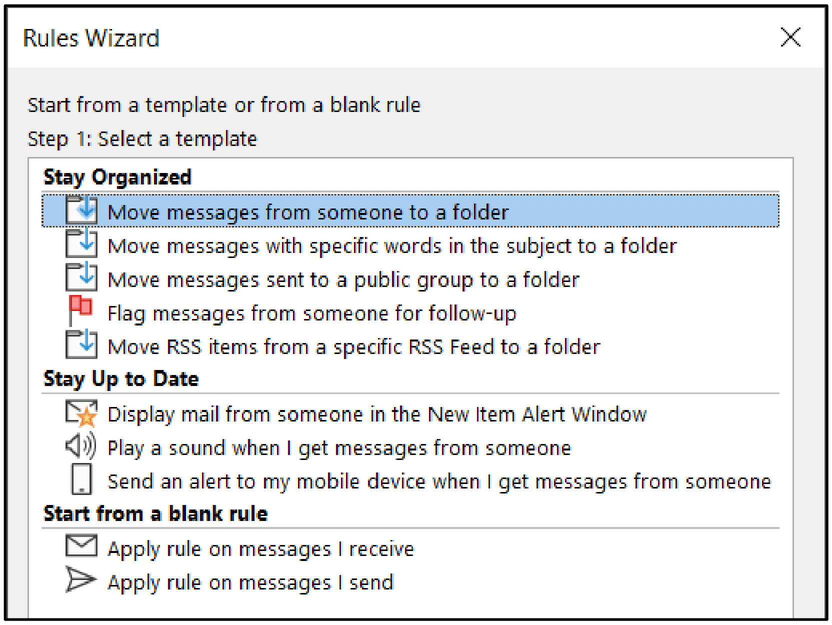

FIGURE 6-1

4. Under **Step 1**, check the boxes to add additional conditions, if any.
5. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.

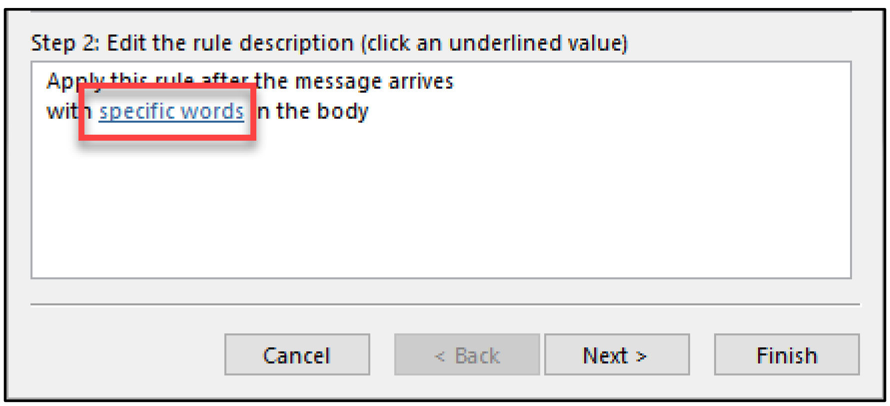

FIGURE 6-2

6. Click on the **Next > button**.
7. Under **Step 1**, check the box(es) next any additional action(s), if any.
8. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.
9. Click on the **Next > button**.
10. Under **Step 1**, check the box(es) next the desired exception(s), if any.
11. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.
12. Click on the **Next > button**.
13. Name the rule.

14. Optionally, to apply the rule to all emails in your inbox, under **Step 2**, check the box for **Run this rule now on messages already in "inbox."**
15. Click **Finish**.

Create Rules from Existing Emails

You can also create rules from existing emails. Doing so pre-populates many of the fields for you.

Simple Rules

The simplest rules to create use sender, subject, and/or recipient as the condition and move the email into a specified folder or create an alert as the action.

1. Find an email that meets your conditions.
2. Right-click on the email and select **Rules → Create Rule...**
3. The Create Rule dialog will pre-populate with information from the email, including the sender, the subject, and the recipients. Check the box next to the desired condition(s).
4. Check the box next the desired action(s).
5. Click **OK.**

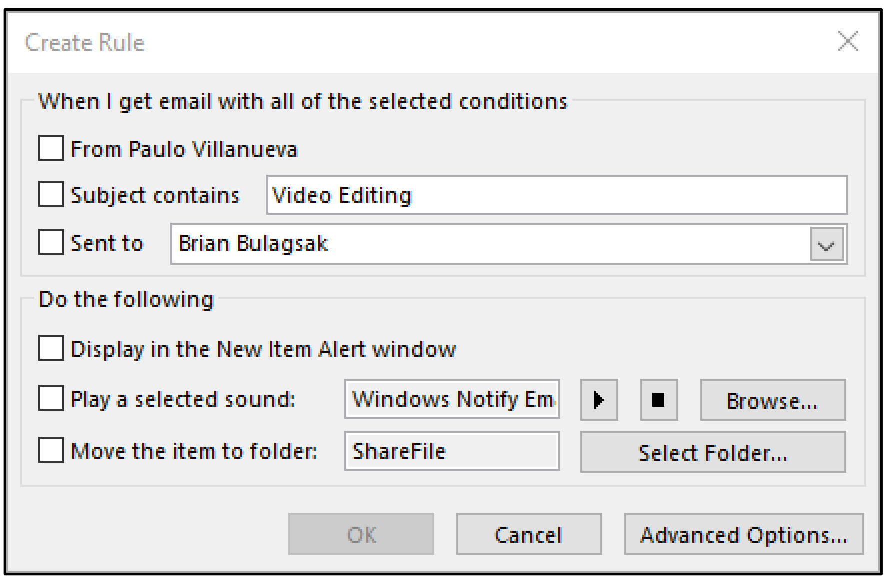

FIGURE 6-3

More Complex Rules

You can create more complex rules from existing emails, you just need to use the advanced options.

1. Find an email that meets your conditions.
2. Right-click on the email and select **Rules → Create Rule...**
3. Click on the **Advanced Options... button**.
4. Under **Step 1**, check the box(es) next the desired condition(s).

5. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.

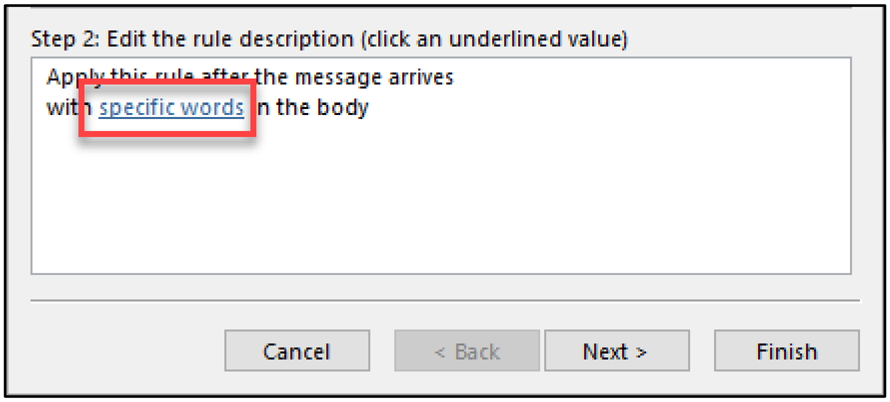

FIGURE 6-4

6. Click on the **Next > button**.
7. Under **Step 1**, check the box(es) next the desired action(s).
8. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.
9. Click on the **Next > button**.
10. Under **Step 1**, check the box(es) next the desired exception(s), if any.
11. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.
12. Click on the **Next > button**.
13. Name the rule.
14. Optionally, to apply the rule to all emails in your inbox, under **Step 2**, check the box for **Run this rule now on messages already in "inbox."**
15. Click **Finish**.

Example Rules

Delay Send Email by One Minute

Instructions to set up a rule to delay sending mail by one minute (in case you change your mind):

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click the **New Rule** button.
3. Select **Apply rule on messages I send** and click **Next**.

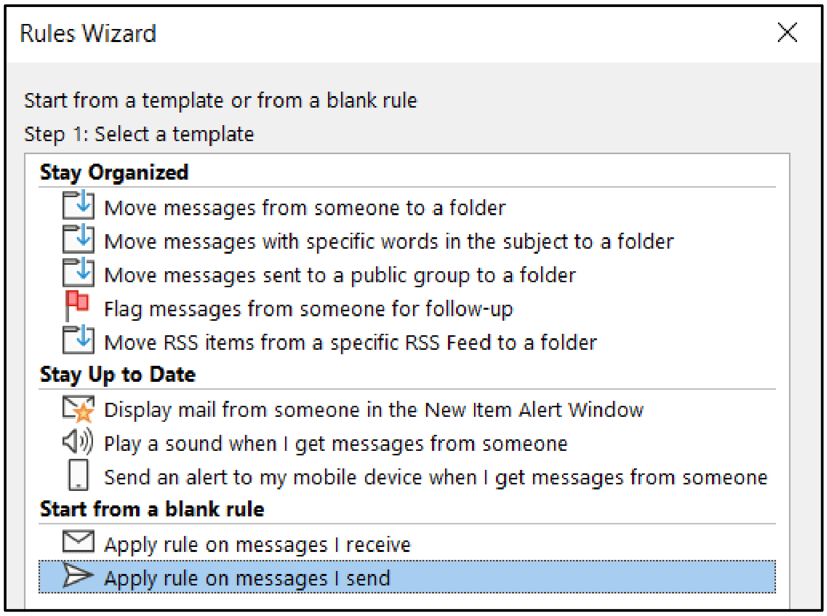

FIGURE 6-5

4. On the next screen ("which conditions do you want to check"), don't check anything (you want this rule to apply to every email you send) and click the **Next** button at the bottom. You'll see the following dialog (click **Yes**):

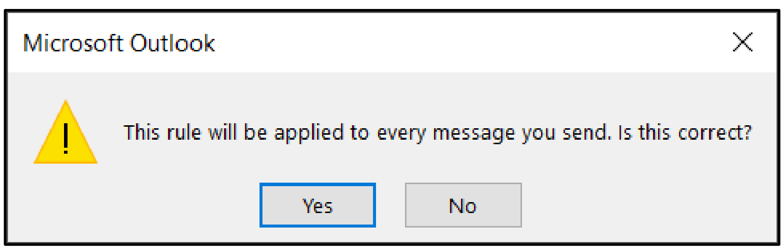

FIGURE 6-6

5. In the next screen, check **defer delivery by a number of minutes**, and then click the hyperlink for **a number of** at the bottom of the screen and enter the number of minutes you want to delay your email. Click **OK**.

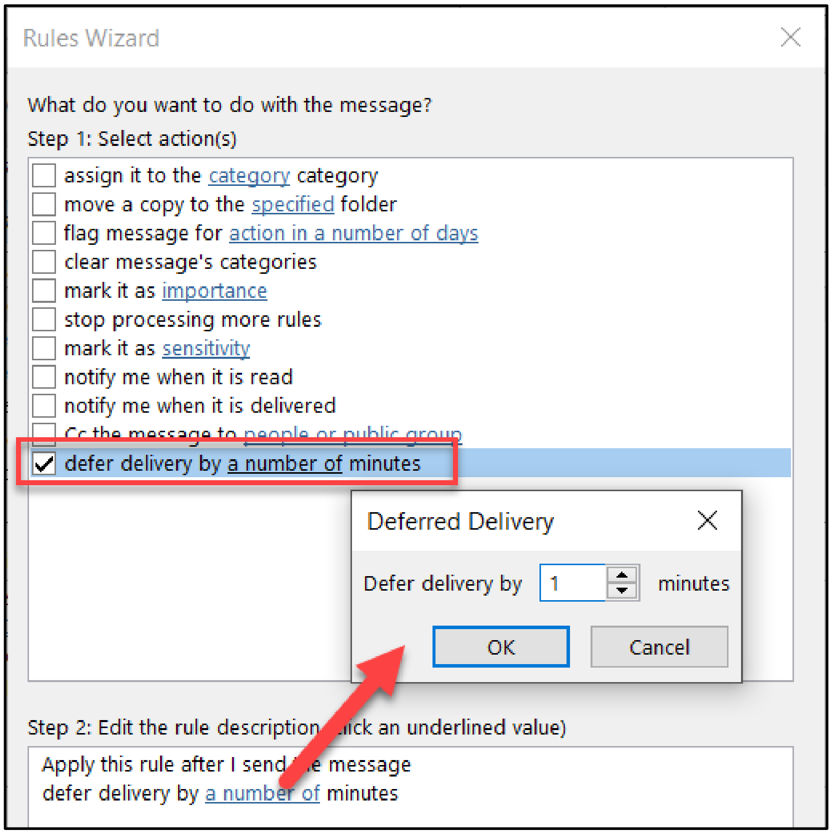

FIGURE 6-7

6. Click **Next** and add any exceptions (for people you don't want to delay email to).
7. Click **Next**, name your rule "Delay" (or anything else you want to name it) and click **Finish**.

Keep Track of Delegated Email

Many people forward email to others to deal with but have a difficult time remembering what they delegated for follow up purposes. Here's a rule that will help.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click the **New Rule** button.
3. Select **Apply rule on messages I receive** and click **Next**.

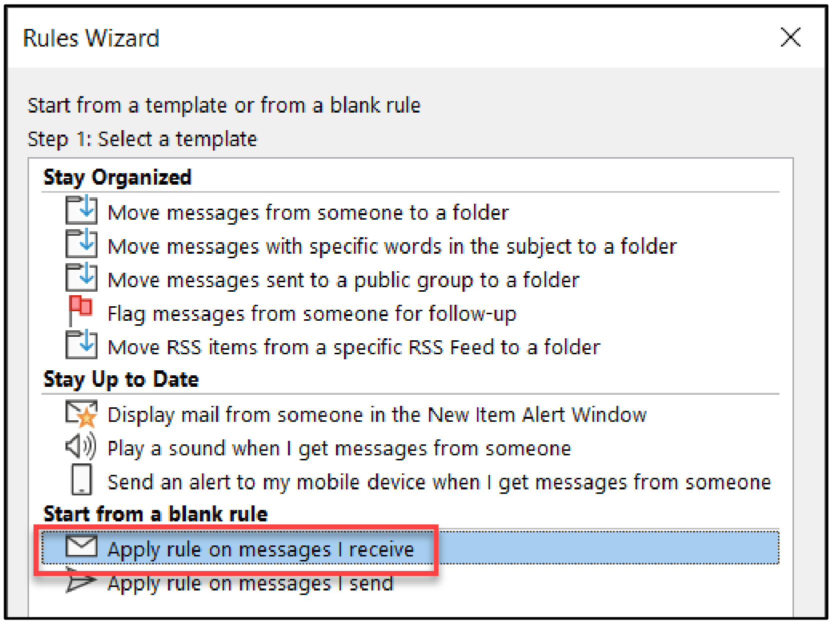

FIGURE 6-8

4. Under "Which conditions do you want to check?," check BOTH **from people or public group** and **where my name is in the CC box**. At the bottom of the dialog, click the hyperlink for **people or public group** and add your email address. We're basically creating a rule that will look for emails from you and copied to you. Click **Next**.

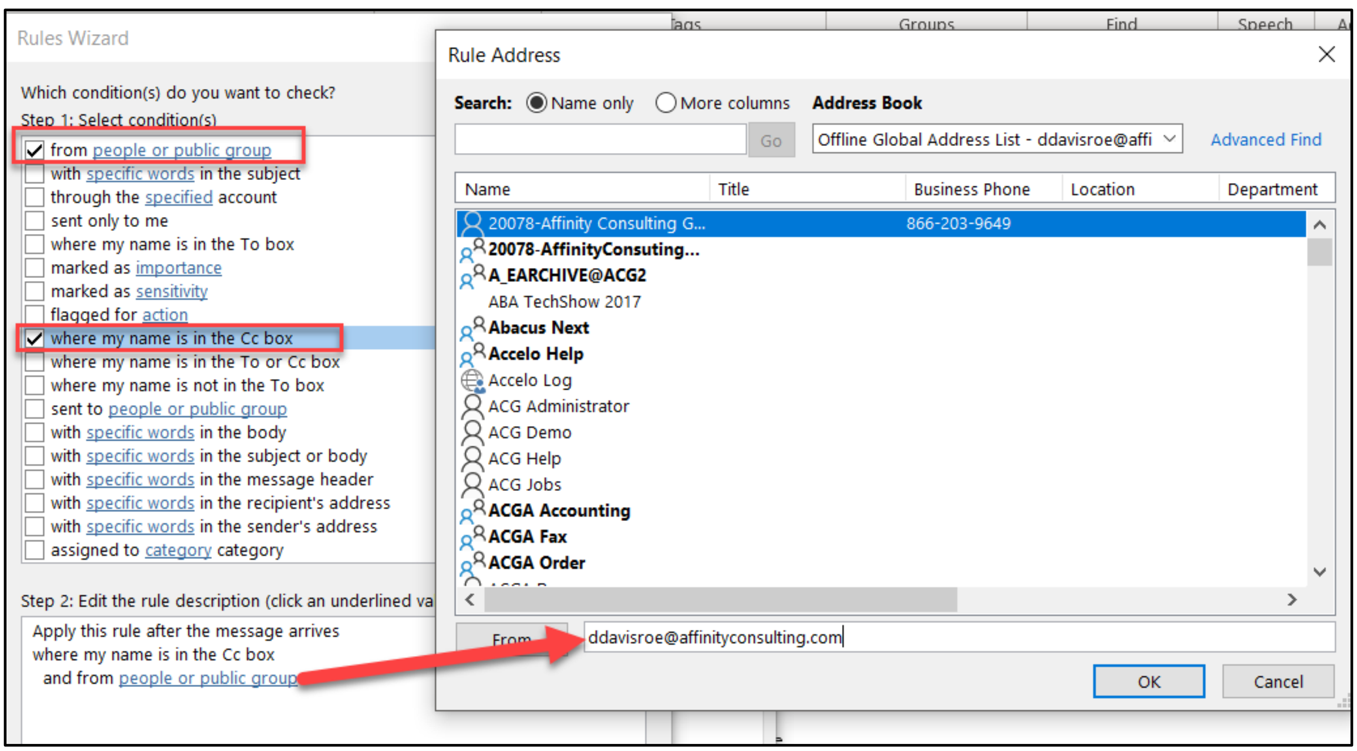

FIGURE 6-9

5. Under "What do you want to do with the message?" choose **move it to the specified folder**. Make the specified folder your Delegated Mail folder. Click **Next** and add any exceptions. Click **Next**, name it and click **Finish**.

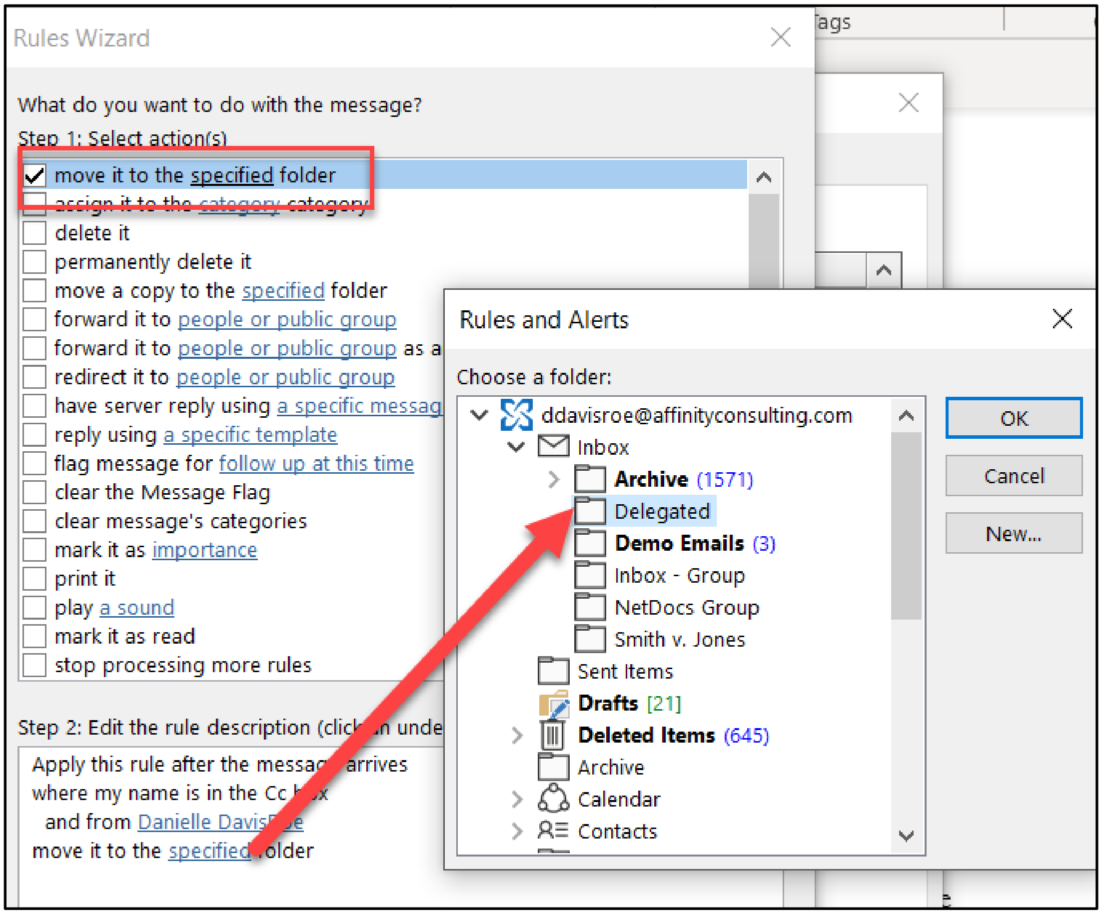

FIGURE 6-10

Manage Rules

Turning Off Rules

Turn rules off by un-checking them in the Rules and Alerts dialog.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Uncheck the boxes next to any rules you want to turn off.

Reordering Rules

Rules are processed in the order in which they are listed in the Rules and Alerts dialog. The order may make a difference if more than one rule applies to an incoming email.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Use the up and down arrows to reorder the rules.

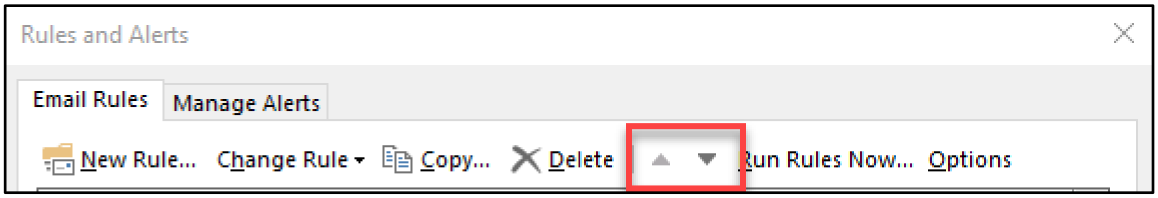

FIGURE 6-11

Stop Processing Rules

Sometimes, when a condition is met and a rule is applied, you want to stop processing other rules. Stop processing rules is an action that can be added to any rule. See below for instructions on how to edit any existing rules.

Editing Existing Rules

You can edit any existing rules through the Rules and Alerts dialog.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click on **Change Rule**.
3. Select **Edit Rule Settings...**

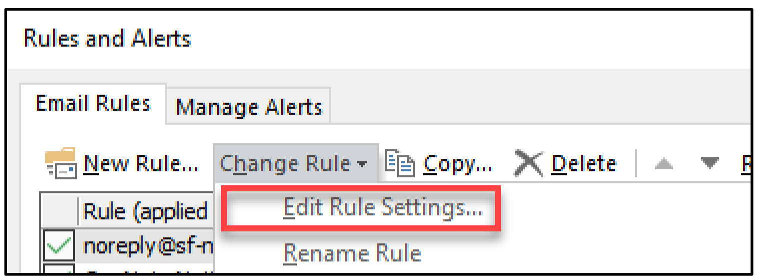

FIGURE 6-12

CHAPTER 7
EMAIL: QUICK STEPS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Quick steps are used to automate repetitive steps. Unlike rules, they are not automatically applied. You must click on a button or use a shortcut key to invoke the quick step. Because they are not automatically applied, there are no conditions or exceptions to set up. Quick steps can be used for things such as moving email to a folder, deleting email, marking it as read, flagging it, categorizing it, creating appointments, or replying/forwarding.

Creating Quick Steps

1. On the **Home ribbon**, in the **Quick Steps group**, click on **Create New**.

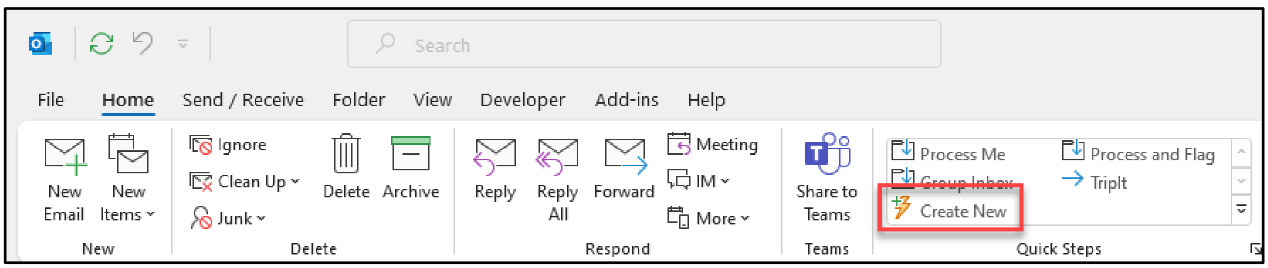

FIGURE 7-1

2. Name your quick step.
3. Choose an Action and complete any necessary fields for that action.
4. Click on the **Add Action button** to add any additional actions.
5. Click **Finish**.

Example Quick Step: Forward Emails

If you frequently forward emails to the same person or group of people, setting up a quick step can reduce the number of clicks it takes to forward emails in the future.

1. On the **Home ribbon**, in the **Quick Steps group**, click on **Create New**.

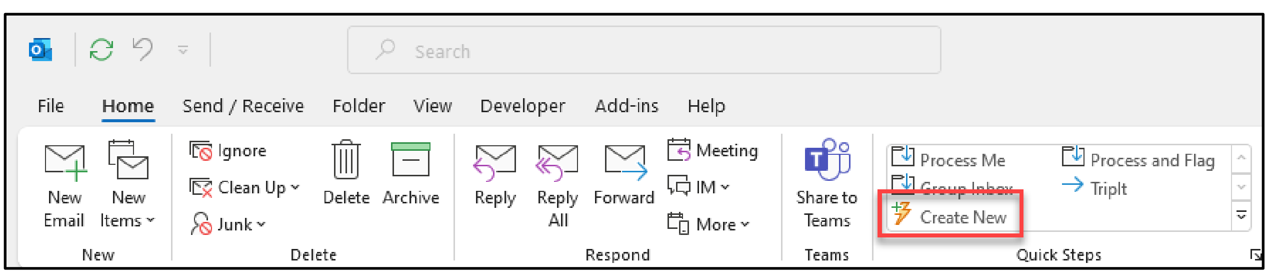

FIGURE 7-2

2. Name your quick step.
3. Under **Choose an Action**, select **Forward**.
4. In the **To field**, enter the emails address(es) of the recipients.
5. Click on **Show Options**.

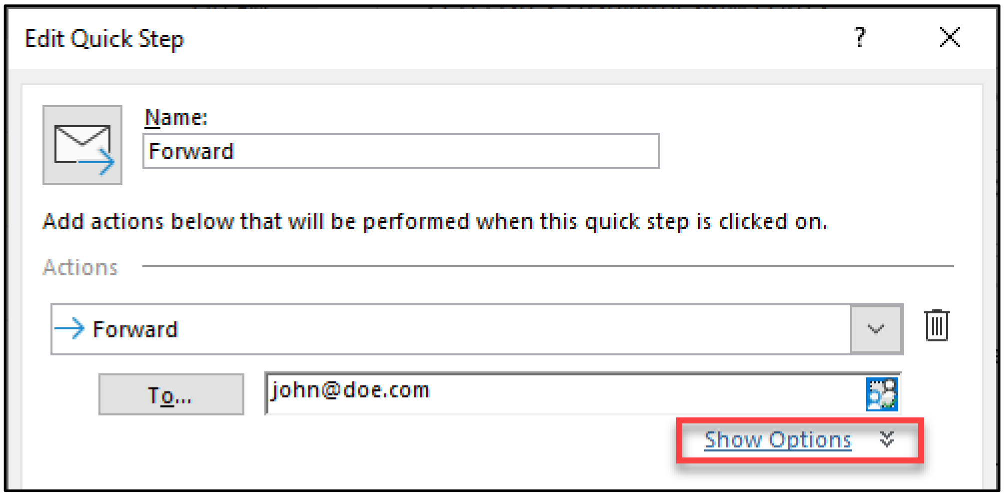

FIGURE 7-3

6. Add cc or bcc addresses, change the subject, set a flag, or mark the importance, if desired.
7. Add default text to the body of your email (if desired) with the **Text field**.

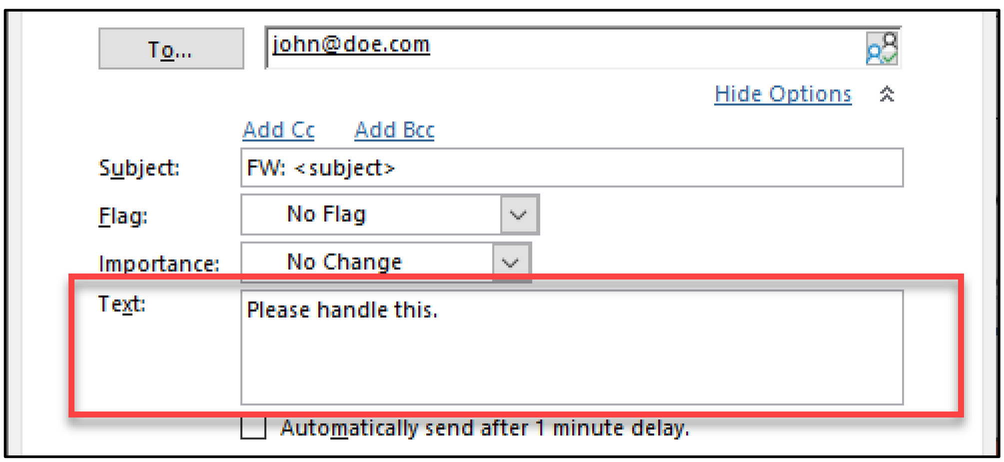

FIGURE 7-4

8. To automatically send the email, check the box to **Automatically send after 1 minute delay**. If you do not check this box, the forward will open. You will have the opportunity to change the email recipients or text, but you must click send to forward the email.
9. To move the forwarded email out of your inbox and into another folder, click on the **Add Action button.**
10. Under **Choose an Action**, select **Move to a Folder**.
11. Under **Choose Folder**, select the desired folder.
12. Click **Finish**.

Using Quick Steps

After the quick steps are set up:

1. Select the email(s) you want to apply the quick steps to.
2. On the **Home ribbon**, in the **Quick Steps group**, click on the name of the quick step.

Assigning Keyboard Shortcuts

You can assign keyboard shortcuts for up to 9 quick steps:

1. On the **Home ribbon**, in the **Quick Steps group**, click on the button, and select **Manage Quick Steps.**
2. Select the quick step and click **Edit**.
3. Under **Shortcut key**, select a shortcut key.

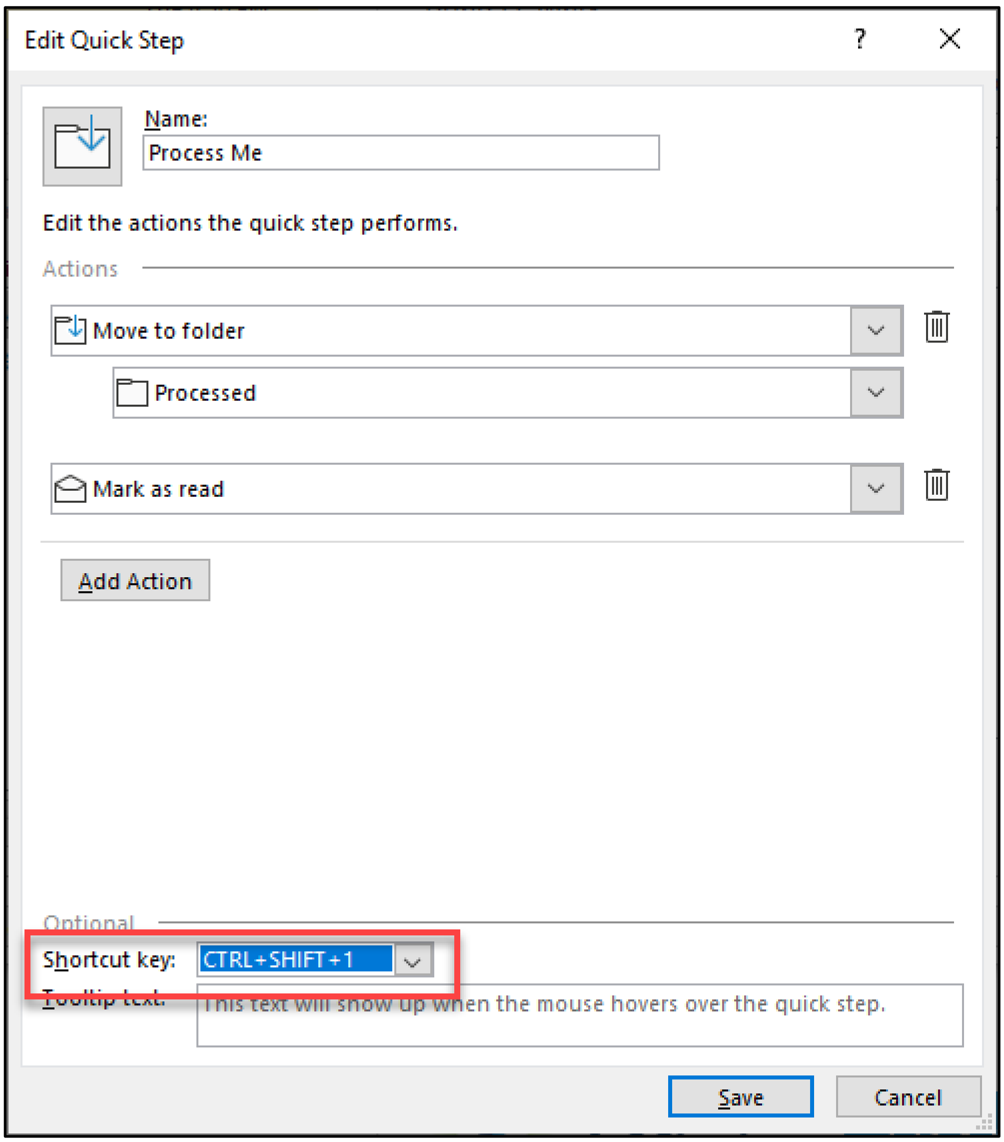

FIGURE 7-5

Managing Quick Steps

To manage your quick steps, on the **Home ribbon**, in the **Quick Steps group**, click on the button, and select **Manage Quick Steps.** From the Manage Quick Steps dialog you can edit quick steps, duplicate them, delete them, reorder them, or create new quick steps.

CHAPTER 8

EMAIL: STORAGE AND INBOX CLEAN UP

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Mailbox Cleanup

Mailbox Cleanup helps you manage the size of your email by find emails of a certain age or size, autoarchiving email, emptying your deleted items folder, and deleting conflicts. Access it by clicking **File menu → Info tab (left side) → Tools → Mailbox Cleanup… button**.

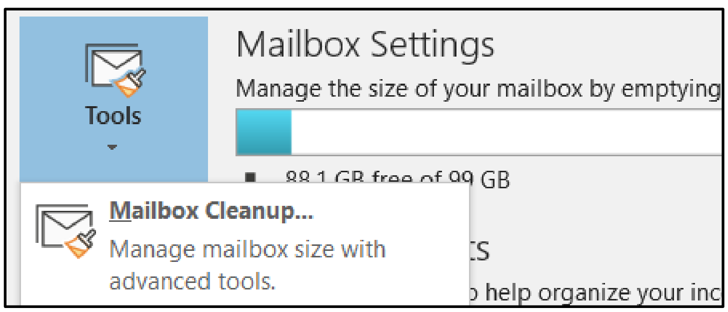

FIGURE 8-1

Removing Redundant Messages

An email conversation is also known as a thread. Many people have multiple emails in their Outlook folders which are earlier pieces of the same thread. The last email in time contains the entirety of the conversation so the older ones aren't needed. Clean can remove the redundant messages from your inbox for you. Any email with a unique attachment will be retained in your inbox. Your sent items will not be affected.

1. On the **Home ribbon**, click the **Clean Up** button in the **Delete group**.

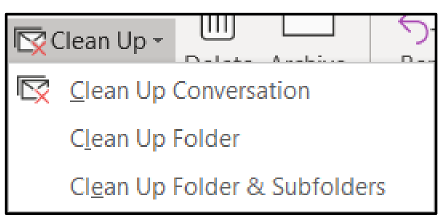

FIGURE 8-2

2. Click one of the following:
   - **Clean Up Conversation**: The current Conversation is reviewed, and redundant messages are deleted.

- **Clean Up Folder**: All Conversations in the selected folder are reviewed, and redundant messages are deleted.
- **Clean Up Folder & Subfolders**: All Conversations in the selected folder and any folder that it contains are reviewed, and redundant messages are deleted.

Archive Old Outlook Email

Outlook users end up with an enormous accumulation of email in their Sent Mail and Deleted Mail folders. Furthermore, some mail is sorted into subfolders and forgotten about. All of this will start to bog down servers and PCs as those databases of emails get larger and larger. Thankfully, Outlook has an excellent way to dealing with this problem - AutoArchive. In a nutshell, AutoArchive will allow you to a) permanently delete expired items, b) delete, or c) archive old items to an archive file (archived database). Conveniently, the first time AutoArchive runs, it creates the archive database for you. It is stored on the C:\ by default so you'll either want to move it to a server folder or back it up directly from your C:\. Once it has established itself, you'll see the Archive folder in your Outlook Folder List. There are two sets of AutoArchive settings: global settings and per-folder settings.

Turning AutoArchive On or Off

1. Click the **File → Options → Advanced → AutoArchive Settings... button**.

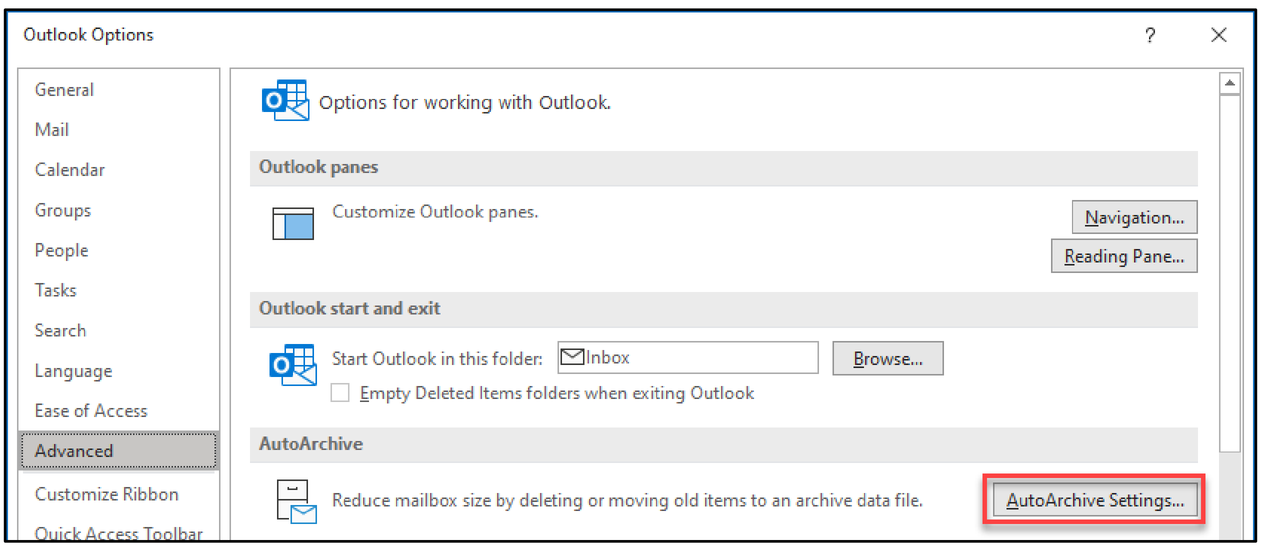

FIGURE 8-3

2. At the top of the following dialog, you'll see **Run AutoArchive every __ days**. If that box is not checked, it will not run. As you can see from the following screen shot, you have many options for this:

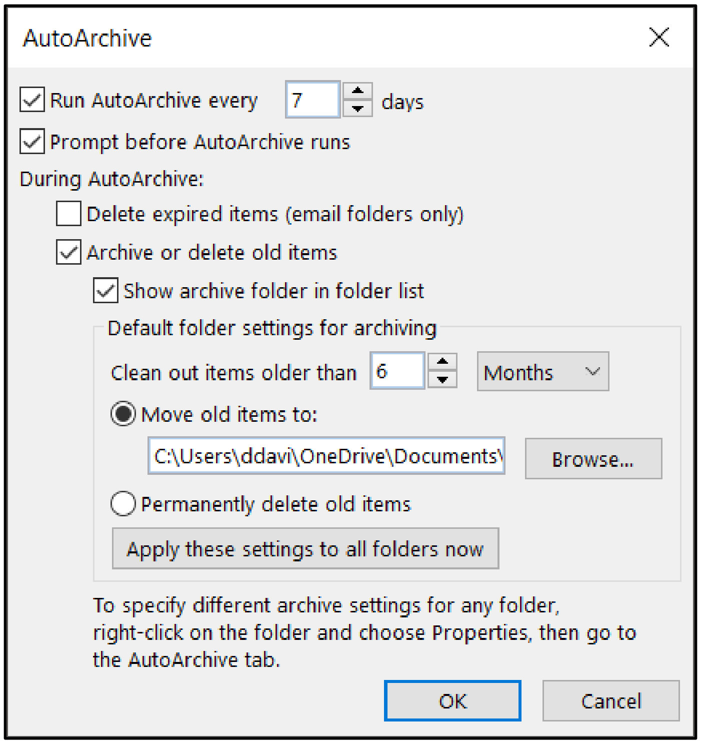

FIGURE 8-4

Controlling the Archive Settings of a Specific Folder

You can control what any folder does in Outlook by following these steps: Right-click the folder → **Properties** → **AutoArchive tab** → Make your changes and click **OK**.

Saving Email Messages Outside of Outlook

When an email message is in your Outlook inbox, it is just a record in a database and *not* a discreet document like a Word file. That fact is a big part of the problem associated with organizing and storing them. Email related to a particular matter is stored in one place; and word processor files related to that matter are stored somewhere else. However, you can create documents out of those emails and those documents can be stored with every other document related to a particular matter or issue.

Saving Email as a Document

The classic problem that law firms have if they do not own a document management system is saving and finding matter-specific email. Why? Because people (1) keep them in their individual inboxes, or (2) save them in subfolders within their own inbox (which no one else has access to), or (3) delete the email altogether. Email is valuable correspondence that in most circumstances should be saved. However, in a law firm or legal department, it should not be saved within one's own individual inbox.

As it turns out, you can save email much like you save a Microsoft Word document clicking the **File** → **Save As**. We recommend that you save as **Outlook Message Format - Unicode (*.msg)** and this is the default file type.

The significant benefit of .msg files is that they also capture any attachments. If you open an MSG file years later and the original email had a Word file and a PDF file attached to it, they will still be there in their native form. Of course, best practice is to separately save all attachments into the public folders where others in your office can find them and not leave them *only* attached to email.

You can also save email as **Text Only** although you'll lose any formatting that was in the email and you'll lose the attachments (if any). Saving as an MSG file will retain the original formatting, look, and feel of the email, while also keeping the attachments.

Saving Email by Dragging into a File Explorer Folder

You can clean out your inbox or subfolders under your inbox by cascading the windows and simply dragging and dropping all of them into the desired folder. This will COPY the emails over into that folder, saving them automatically as MSG (native Outlook Message Format) files, which preserves the metadata and all attachments.

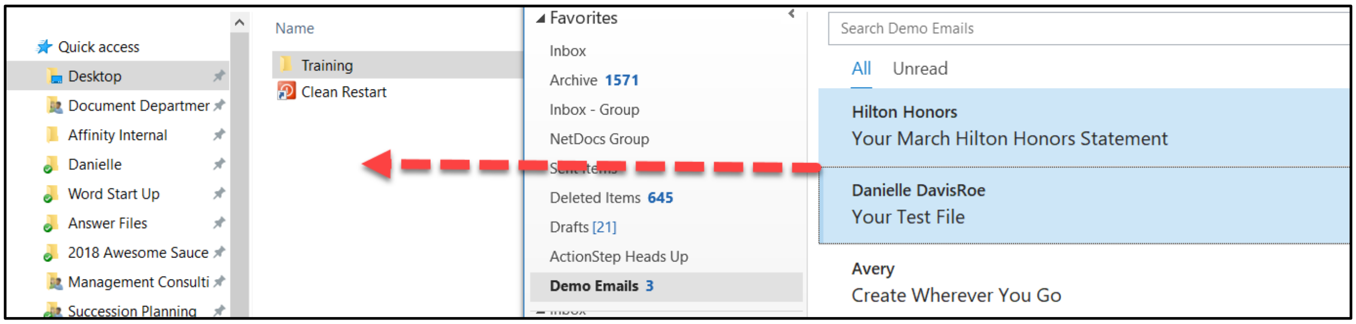

FIGURE 8-5

Saving Email with Document Management Programs (DMS)

While document management programs (NetDocuments, Worldox, iManage, etc.) were originally thought of as only word processing document repositories, that is no longer true. They can now hold just about any type of computer file (word processor, PDF, TIF, email, JPG, etc.).

NetDocuments Example

Using NetDocuments as an example, you can move email into the document management system by dragging and dropping (see below). Once profiled and saved, the emails are stored within the client/matter structure and easily searchable and accessible by anyone who uses the document management system (NetDocuments, in this case). It's also important to note that you can save them one-at-a-time or large quantities of them all at once.

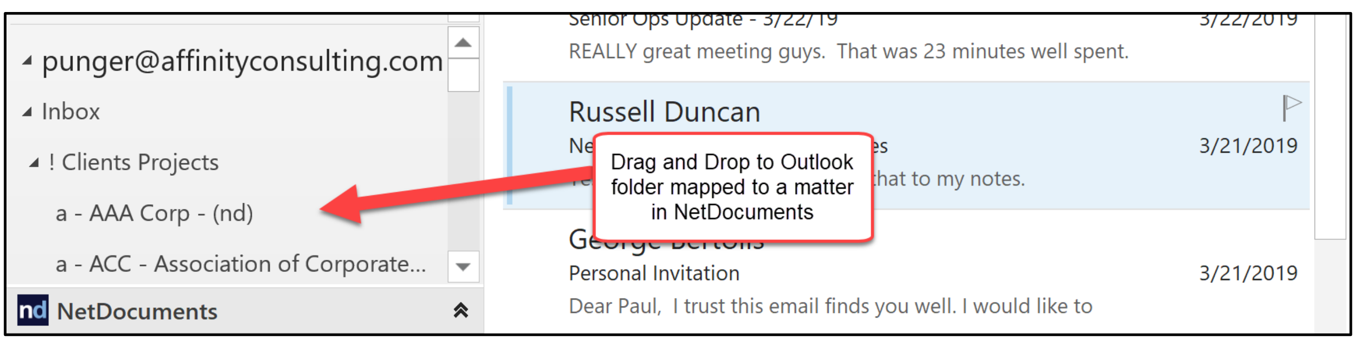

FIGURE 8-6

Saving Email Using a Case/Practice Management Program

This would include programs like Actionstep, Cosmolex, Centerbase, Clio, PracticeMaster, etc. If you have a case management program with Outlook integration, you can streamline the saving of email by saving them directly into the matter within the case management program. You can also auto-associate emails by setting up rules within the practice management program based on the sender.

Saving Email as PDF Files

If you have a PDF program which integrates with Outlook, the PDF program will install a few buttons and an additional menu in Microsoft Outlook that make saving email as PDF files easier, faster and better. For those who wish they had a good way to archive and store emails and attachments, this integration can be a lifesaver.

On some levels, saving emails as PDF files is better than saving as MSG files. That's because Acrobat is an open standard (Adobe released their patent rights to the file format in 2008). As such, you can feel pretty confident that you'll be able to open PDF files in 20 years. Further, if you use an integrated PDF program as described above, it will also capture the attachments just like MSG files do.

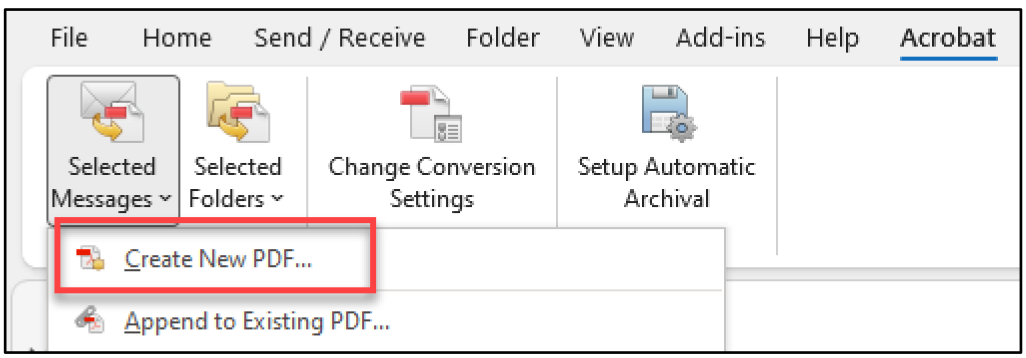

FIGURE 8-7

PDF Programs Which Integrate with Outlook

Adobe Acrobat

- **Acrobat - Creating PDFs from Individual Emails or Entire Folders**: Simply select individual emails (Ctrl + left click) or select entire folders; then click the **Adobe PDF ribbon → Selected Messages → Create New PDF**. This will create a single PDF which contains all of the emails you've selected **and all of the attachments thereto**.
- **Acrobat - Adding Subsequent Emails to Existing PDFs**: If you receive additional emails which need to be added to an existing PDF archive, simply choose **Selected Messages → Append to Existing Adobe PDF**.
- **Acrobat - Automatic Archival**: Using the **Setup Automatic Archival button**, you an also setup folders to automatically archive themselves. This would be particularly useful if you have setup Outlook rules to automatically sort your email into specific folders and then use Acrobat to automatically archive it.

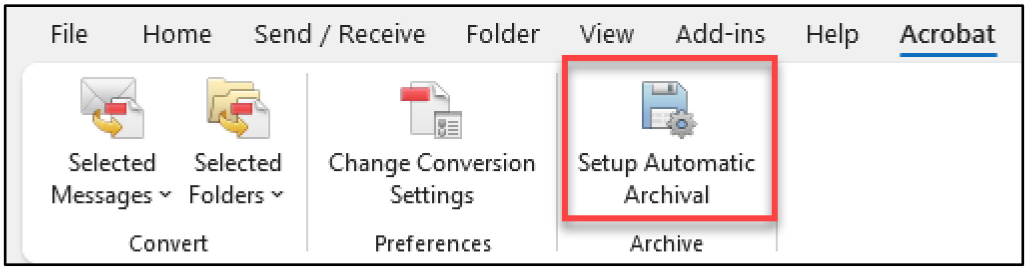

FIGURE 8-8

Saving PDFs Without Acrobat

Other PDF programs that cost a lot less than Acrobat offer similar functionality to that described above with Outlook. For example, all of the following are fantastic:

- **Kofax Power PDF Advanced**: Matches features of Acrobat Professional. Windows only.
- **Kofax Power PDF Standard**: Matches features of Acrobat Standard. Windows only.
- **Foxit PDF Editor Pro**: Very strong feature match with Acrobat Pro. Windows only.
- **Foxit PDF Editor**: Strong match with Acrobat Standard. Windows only.
- **Nitro Productivity Suite**: Nitro Pro (included with the suite, but which cannot be purchased separately) matches the features of Acrobat Professional. Windows only.

If you have Outlook and one of the foregoing programs but *don't* see any special buttons in Outlook, there are several possible causes.

- **Incompatibility**: The first possibility is that your versions of each program aren't compatible. For example, if you have Outlook 2019 and Acrobat 10, you're not going to get the integration because Acrobat 10 isn't compatible with Outlook 2019. Instead, you need to upgrade to Acrobat DC which *is* compatible with Outlook 2019.
- **Installation Order**: The second possible cause is the order of installation. For example, assume you have Outlook 365 and Acrobat DC. Those two versions are compatible for the integration to work. However, if you installed Acrobat first and then Outlook, you're not going to see the buttons. When you install Acrobat, it needs to find Outlook already on your computer in order to install its integration. In this case, you might need to re-install Acrobat so it can find your Outlook installation and add the integration.
- **Add-In Disabled**: Outlook add-ins get disabled sometimes. To re-enable them, go to **File → Options → Add-Ins→ Go…** and check the box to re-enable the add-in.

Email Storage Tips

Store Email with Other Related Files

Store the email in the same location as other electronic files related to any particular matter. Any system that requires you to save email separately from other electronic files related to a matter is inadequate.

Delete or Archive Email Once Stored

After an email is stored into a folder or a document management system, delete or archive it. Keep Outlook as clean as possible.

Always Separately Save Attached Documents

Outlook is NOT a document management system and should not be used as a document repository. Documents attached to Outlook emails are actually stored in a temporary folder structure that is incredibly convoluted and is normally hidden. For example, the attachment to an email I just opened is stored in my hard drive under this folder:

C:\Users\barron\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Outlook\O0T0A5E5

For the record, that's 8 folders deep and the structure from \Temporary Internet Files down is not even visible in Windows Explorer. The point is, it is incredibly easy to lose attached documents that aren't saved separately (unless you have a document management system that saves attachments at the same time the email itself is saved).

Stop Printing Email

If you've saved email digitally, then they're easily searchable and printing them to throw in paper files only makes your paper files fatter, harder to manage and harder to search.

Benefits of Storing Email Outside of Outlook

No Worry About Email Storage Limitations

If you offload the email in your Outlook folder structure and save them as separate files or in other programs, then you can get them out of Outlook. As such, the IT folks will stop complaining that you're overloading the Exchange server and your computer will operate faster.

Everyone Else Can Find Them Too

Once saved as separate files, others in your office will be able to find these important client communications. You're on your way to building a complete digital file.

Searchable Like All Other Documents

If you're saving into a document management system, then the content of all email stored therein is searchable. If the email is stored as separate files (PDFs, MSG files), then there are free or very inexpensive search programs that can help you find any of them by the words contained inside them.

Saving Attachments to Email

Open the email, right click the attachment, and choose **Save As**. To save all attachments once, choose **Save All Attachments.**

CHAPTER 9
EMAIL: DEALING WITH SPAM

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If unwanted emails are flooding your email, you can use Outlook's junk email settings to send emails to your junk email folder.

Junk Mail Options

You'll find the junk mail options on the **Home ribbon → Delete group → Junk button → Junk Email Options**.

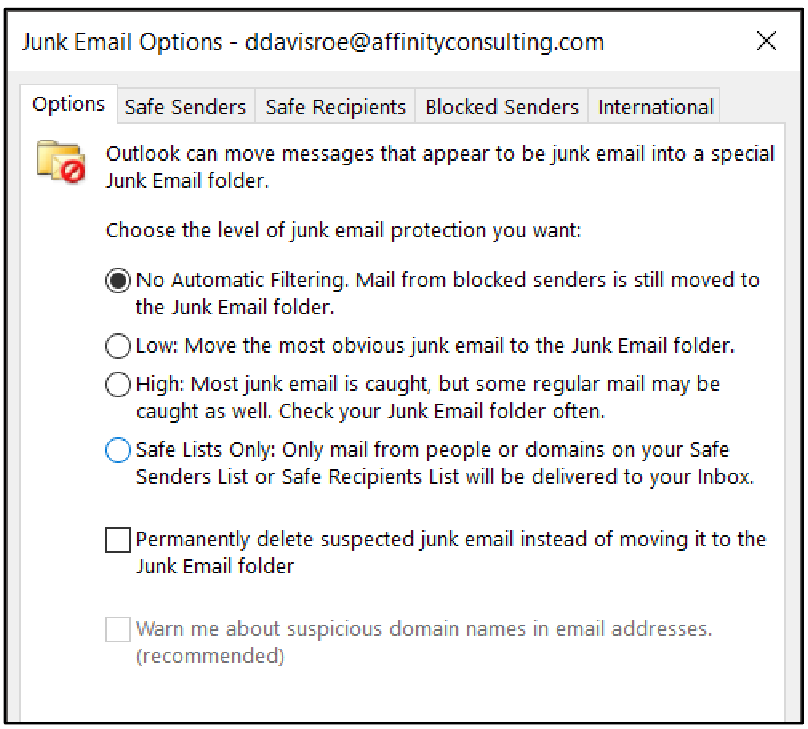

FIGURE 9-1

Select **No Automatic Filtering** if you do not want Outlook to automatically filter suspected spam into your junk email folder. Use this you use another service to quarantine spam for you.

If you select **Safe Lists Only**, Outlook will send all email to your junk email folder unless the sender has been added to your safe senders or recipients list.

Low or **High** will use AI to determine which emails are likely spam and filter them into the junk email folder accordingly.

Checking the box to permanently delete suspected junk email will skip your junk email folder. If any legitimate email is suspected of being spam, you will not be able to retrieve it.

Block Senders

The easiest way to do this is to right-click on an email from a sender you want to block in the future. Right-click the email, choose **Junk → Block Sender**. You can also block all emails from someone at the sender's domain.

Safe Senders

To add someone to your safe senders list, right-click on an email from them, and choose **Junk → Never Block Sender**. You can also add the sender's domain to your safe senders list, ensuring you never miss an email from someone at that domain.

Managing Blocked and Safe Sender Lists

Open your junk email options: **Home ribbon → Delete group → Junk button → Junk Email Options**.

Open the Safe Senders tab to see a list of safe email addresses and domains. To remove one, click on it and click on the **Remove button**.

Open the Blocked Senders tab to see a list of blocked email addresses and domains. To remove one, click on it and click on the **Remove button**.

CHAPTER 10
CALENDAR

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Configuring the Calendar View

Almost everything in the calendar view can be turned on or off from the controls on the View tab. The diagram below shows the controls for the various panels.

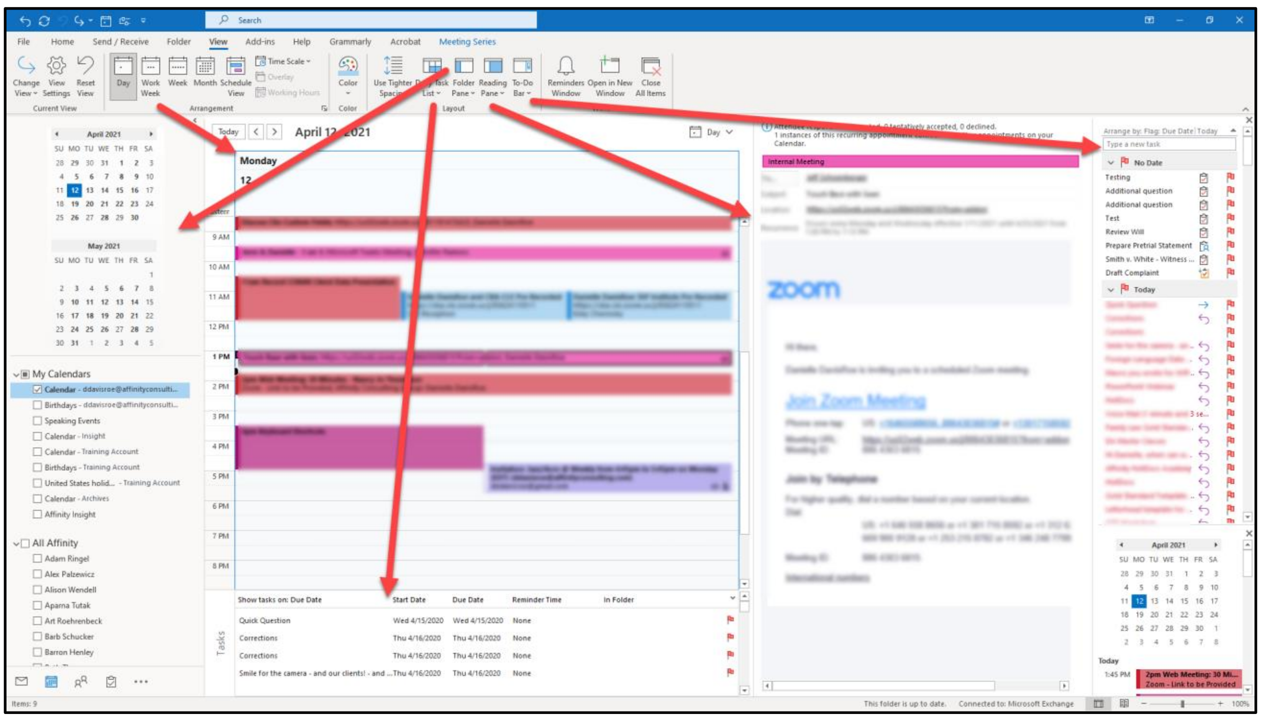

FIGURE 10-1

To see tasks underneath the calendar, activate the “Daily Task List” on the View tab.

Creating Appointments and Meetings

An appointment is an event on your calendar. A meeting is an appointment that others are invited to. Create either from the **Home ribbon** using the **New Appointment** or **New Meeting buttons**. Alternatively, you can click on the start time on your calendar and press **Ctrl + Shift + A.**

Converting an Appointment to a Meeting

You can make an appointment a meeting by clicking on the **Invite Attendees button** on the **Appointment ribbon**.

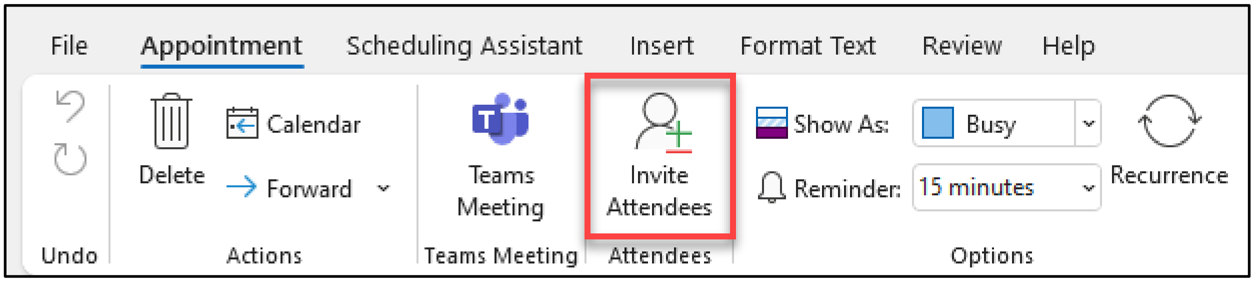

FIGURE 10-2

All-Day Appointments

You can schedule an all-day appointment by checking the **All day box**.

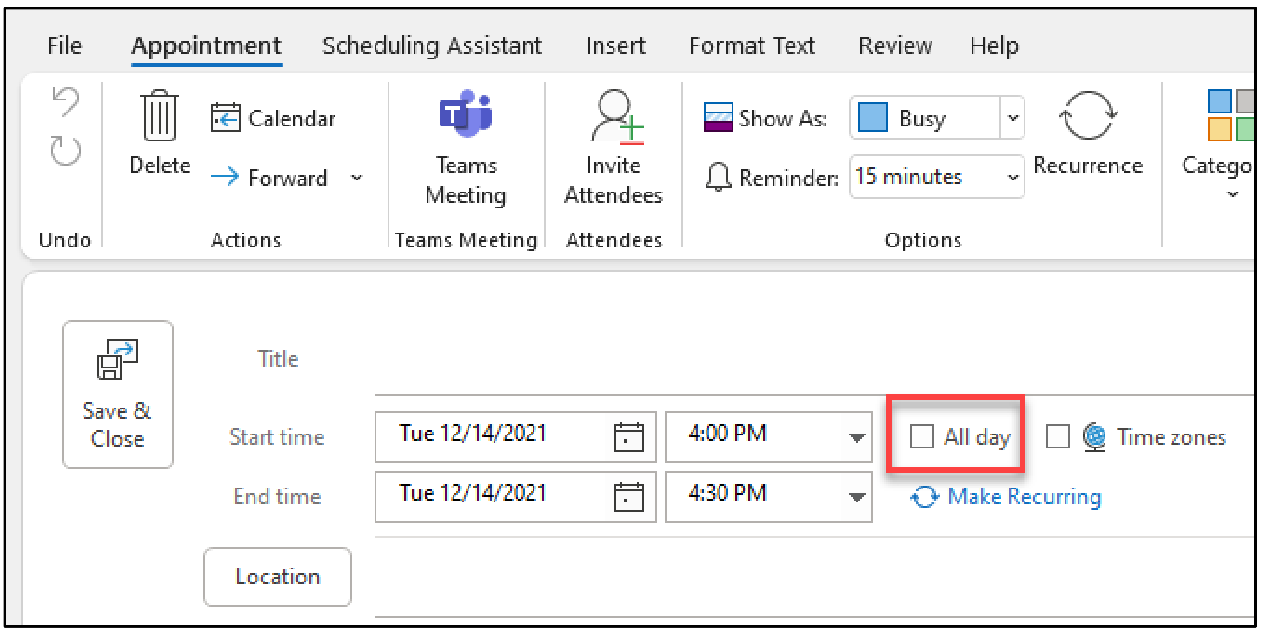

FIGURE 10-3

All day appointments show up at the top of the calendar. If others have access to your calendar, it can be easy for them to miss all day appointments. Therefore, many people schedule all day events from 8 am to 5 pm to make them hard to miss.

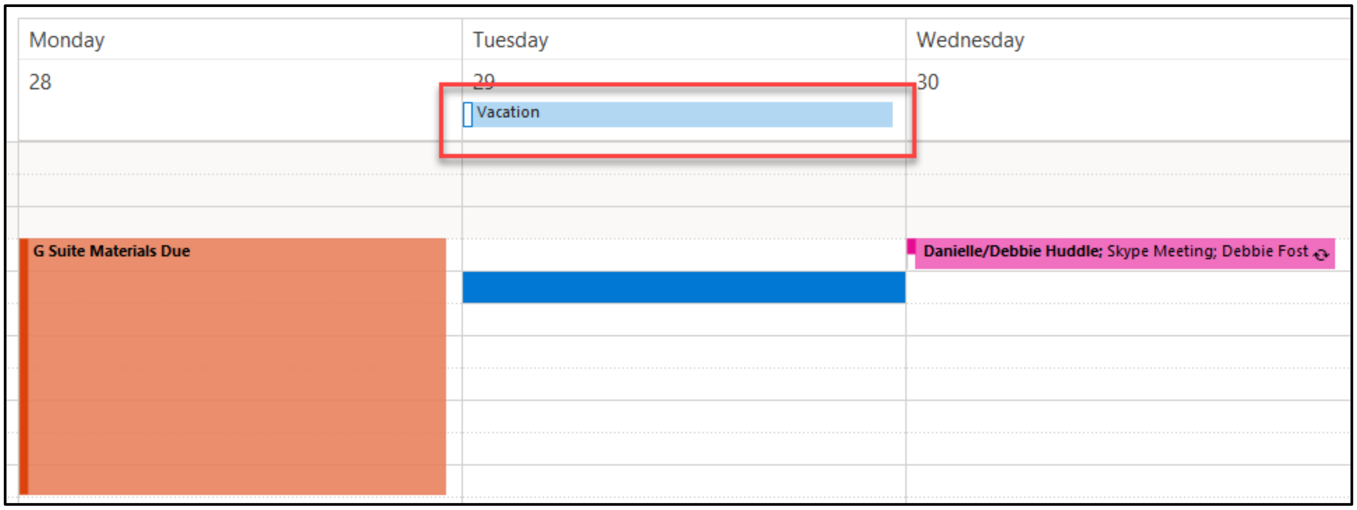

FIGURE 10-4

Making Appointment Private

Right click on calendar and select “Private.” No one you share your calendar with will be able to see the details of the appointment. Outlook will continue to show the time of the appointment as busy.

Adding Attachments to Appointments

You can add attachments to appointments by dragging and dropping files into the Notes field or using the **Attach File button** on the **Insert ribbon**.

Duplicating an Appointment

Hold down the control key and drag the appointment to a different date or use **Ctrl + C** to copy the appointment and **Ctrl + V** to paste it. You will need to then send any meeting invitations on a duplicated appointment.: open the meeting and click on the **Send button**.

Recurring Appointments

Recurring appointments are denoted by a  symbol.

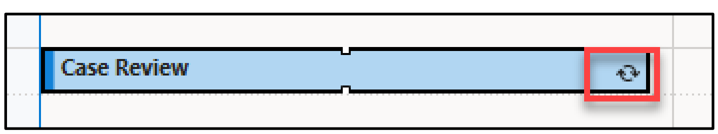

FIGURE 10-5

To make an appointment a recurring appointment, click on the **Recurrence button** on the **Appointment ribbon.**

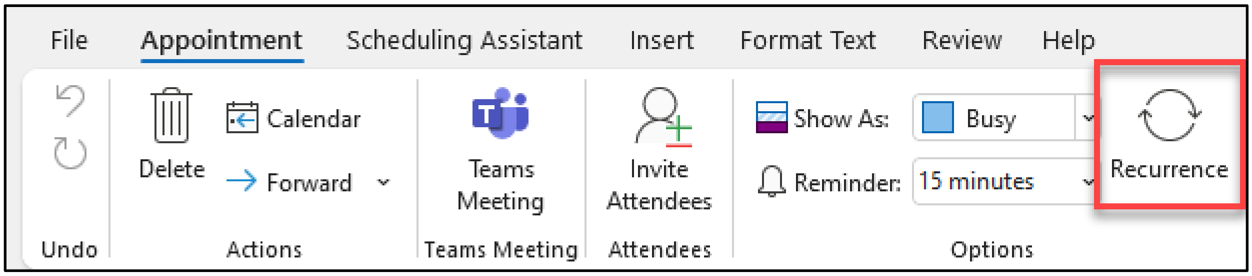

FIGURE 10-6

Recurrence Pattern

Daily recurrence is used for appointments that occur every day, every weekday, or a specific number of days apart.

Weekly recurrence is used for appointments that recur on the same day(s) of the week every week or a specific number of weeks apart.

Monthly recurrence is used for appointments that occur on the same day each month, whether that is the 14th day or the first Friday every month or a specific number of months apart.

Yearly recurrence is used for appointments that occur on the same day each year, whether that is the 14th day of September or the first Friday or May every year or a specific number of years apart.

Range of Recurrence

The recurrence can continue indefinitely or can end after a specific number of occurrences or on a certain date.

Changing Recurring Appointments

When opening a recurring appointment, Outlook will ask whether you want to open just this appointment or the entire series. Open just this appointment to make any changes specific that one occasion. Open the entire series to makes changes to all appointments.

Appointments that differ from the series are denoted with slash through the recurrence symbol.

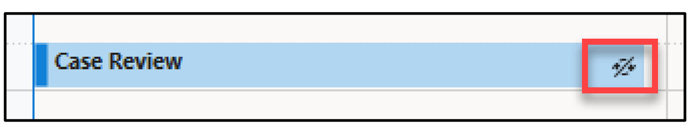

FIGURE 10-7

If you later edit the times or days of the series, any changes you made to specific appointments will be overwritten by the new recurrence.

Scheduling Meetings

Scheduling meetings can be challenging when everyone has a busy schedule. Luckily, Outlook has some tricks you can use to make finding time to meet easier.

Scheduling Assistant

For those whose calendars you are able to see (see page 70), you can use the Scheduling Assistant to see their availability when scheduling meetings.

1. On the **Home ribbon**, in the **New group**, click on **New Meeting**.
2. Click on the **Scheduling Assistant tab**.
3. Click on **Add required attendee** or **Add optional attendee** to add someone's availability.

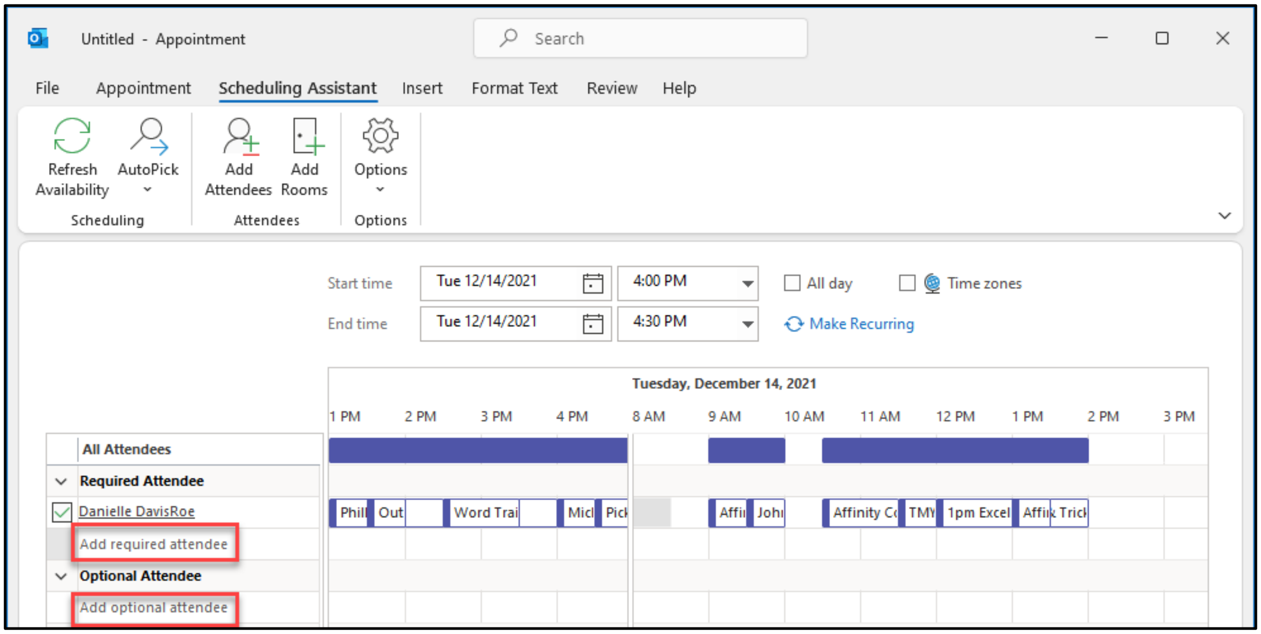

FIGURE 10-8

Add-In: FindTime

FindTime is an Outlook add-in that makes it easier to schedule meetings with people outside of your organization.

Installing FindTime

Start by installing it from the app store:

1. On the **Home ribbon**, click on **Get Add-Ins**.
2. Search for **FindTime**.
3. Click on the **Add button**.

Using FindTime

To use FindTime when drafting an email:

1. Add required attendees to the **To field**.
2. Add optional attendees to the **Cc field**.
3. On the **Message ribbon**, click on **New Meeting Poll**.
4. In the **FindTime pane**, availability will be shown by color. Hover over the silhouette to see the individual's name.
   - Green: Available
   - Red: Unavailable

- Gray: Unknown (people outside your organization or whose calendar you do not have permissions to see)
- Underlined: Required Attendee

5. Click on times to offer them as possible meeting times for the attendees.

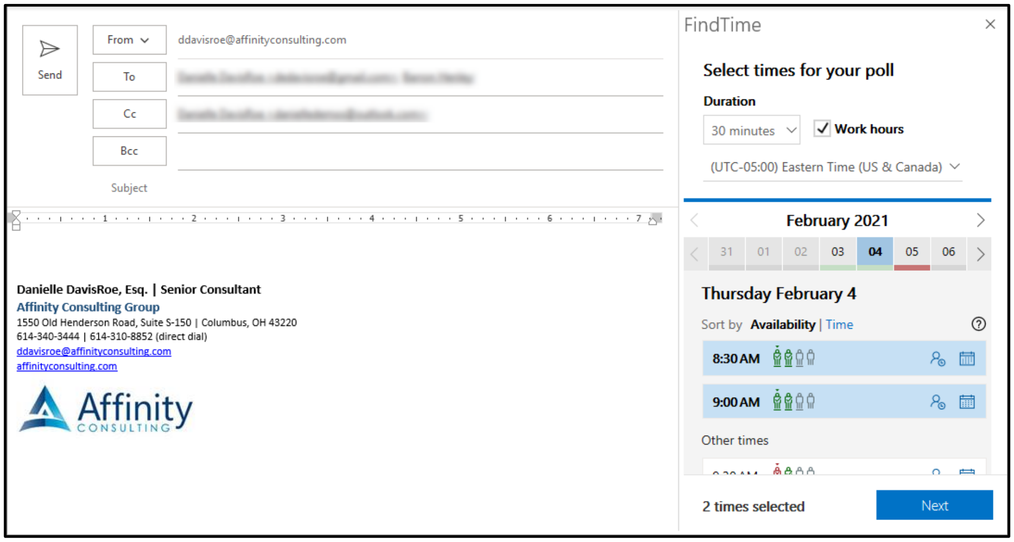

FIGURE 10-9

6. Click **Next**.
7. Change the settings as desired and click on **Add to email**.

Attendees will receive a link with the proposed meeting times. They will be prompted to select their name from the list of attendees and can get specify which times work for them.

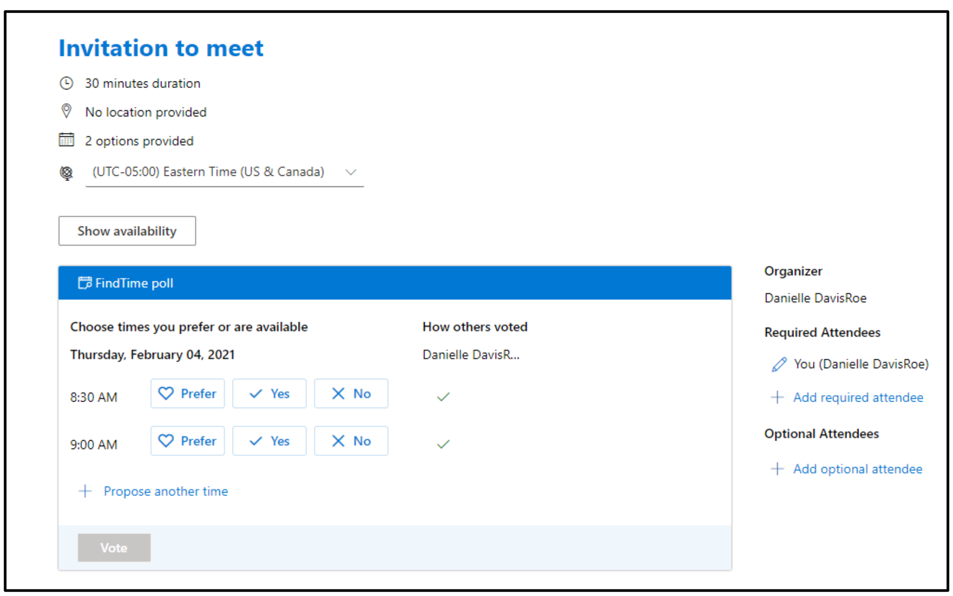

FIGURE 10-10

Rooms

If your organization uses Outlook to schedule conference rooms or other locations, you can add that room directly to your calendar appointment or use the Room Finder to locate an available room.

Scheduling a Room

To schedule a room to an appointment or meeting:

1. Click on the **Location button**.
2. Double-click on the name of the room.
3. Click **OK**.

Checking Room Availability

To check what rooms are available for an appointment or meeting:

1. On the **Scheduling Assistant ribbon**, click on **Add Rooms**.
2. Double-click on the names of the rooms.
3. Click **OK**.
4. On the **Room Finder pane**, see which rooms are available at which times.

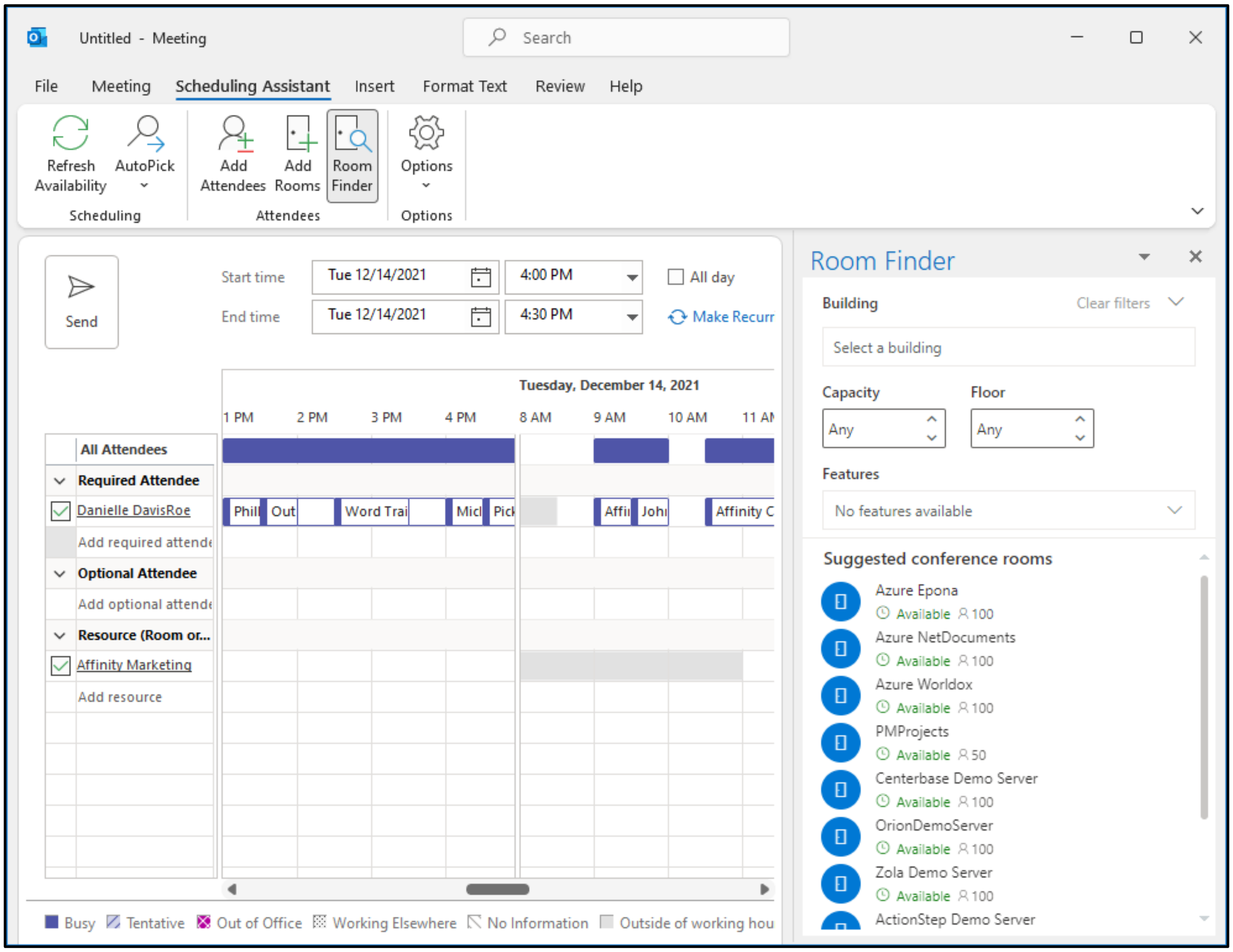

FIGURE 10-11

Viewing Your Calendar

Arrange Options

You can easily switch between a single day view, your work week, the full week, and a month use the arrange buttons found on the **Home** and **View ribbons**.

Go To

The **Home ribbon**'s **Go To** options allow you to quickly navigate to the current day or see the next 7 days.

Viewing Non-Contiguous Days Side-By-Side

To view non-contiguous days side-by-side:

1. Go to your Outlook calendar and click on the **Day button**.
2. Left click on the first day you want to see.
3. Now hold down on the Ctrl key and left click the rest of the days.

Move an Appointment by Dragging It

If an appointment gets moved, the easiest way to make the change on your calendar is by dragging it to the new day. When you're in the calendar in Outlook, the "Folder Pane" on the left side of the screen can be re-sized to show you multiple months. An appointment from the right side of your screen can be dragged to any day you see on the left.

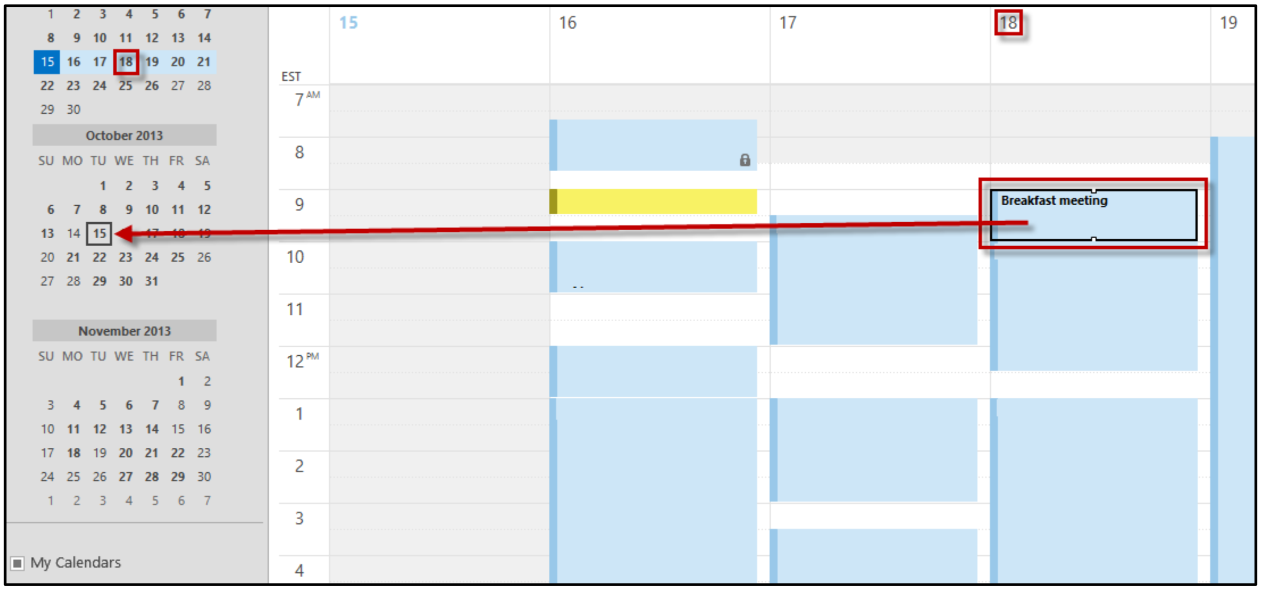

FIGURE 10-12

If you want to copy the appointment rather than move it, follow the steps above, but hold down on the Ctrl key at the same time.

Reminders

Outlook allows you to add one pop up reminder to each appointment. If you need additional reminders, you'll need to create separate appointments to remind you. Alternatively, you can set the reminder for the first time you want reminded and then snooze the reminder when it pops up.

Sharing Calendars

Opening a Shared Calendar

Click **Open Calendar** on the **Home tab** and then **Open Shared Calendar** or **File→Open→Other User's Folder**.

Sharing Your Calendar

Click **Share Calendar** on the **Home tab** to send an invitation.

Giving Elevated Permissions

Click **Calendar Permissions** on the **Home tab**, click the user, then set the permissions and click **OK**.

Creating Calendar Groups

Select **Calendar Groups** on the **Home tab** and **Create new calendar group**. Add calendars or rearrange calendars by dragging and dropping from another group.

CHAPTER 11
PEOPLE

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Creating New Contacts

On the **Home ribbon**, click on **New Contact**, drag and drop email on People button, or right-click on email address and select **add to contacts**.

People View

Outlook defaults to the “new” People view by default. To change back to an older view, just click a different view in the **Current View box** on the **Home ribbon**. The new people view has a streamlined interface and a streamlined editing dialog box for contacts. The people view also tries to aggregate contacts: if the same person is in Outlook twice, the people pane will recognize the same name, link the contact cards, and present them as one card.

Contact Groups

If you routinely send email to a group of people, you can create a distribution list or contact group which will make it much easier. To create one, go to your **Contacts** in Outlook → **New Contact Group button (Home ribbon)** → name the group and add the appropriate email addresses.

Quick Contact Search

For the Quick Contact Search, just hit the **F11** key and type in a first or last name.

Default Outlook to Your Contacts Address Book

When you click the TO button in a new Outlook email, if you have Microsoft Exchange, it defaults to Global Address List which is your internal contact list. This forces you to switch to "Contacts" from the drop-down list every time in order to search your Outlook contacts for an email address. Click **Mail** in Outlook ➔ on the **Home ribbon**, click the **Address Book button** ➔ **Tools menu** ➔ **Options** ➔ under **When opening the address book...** choose **Contacts**.

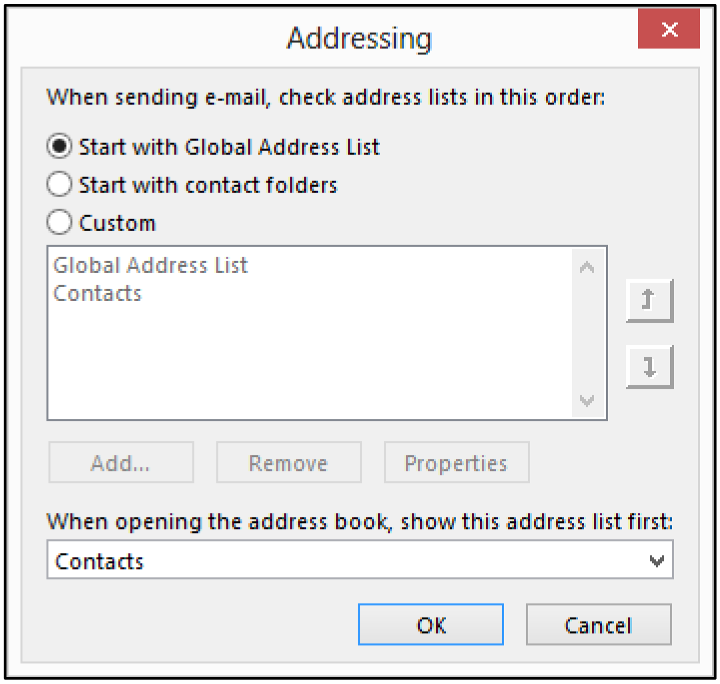

FIGURE 11-1

CHAPTER 12
TASKS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Configuring the Tasks View

Almost everything in the tasks view can be turned on or off from the controls on the View tab. The diagram below shows the controls for the various panels.

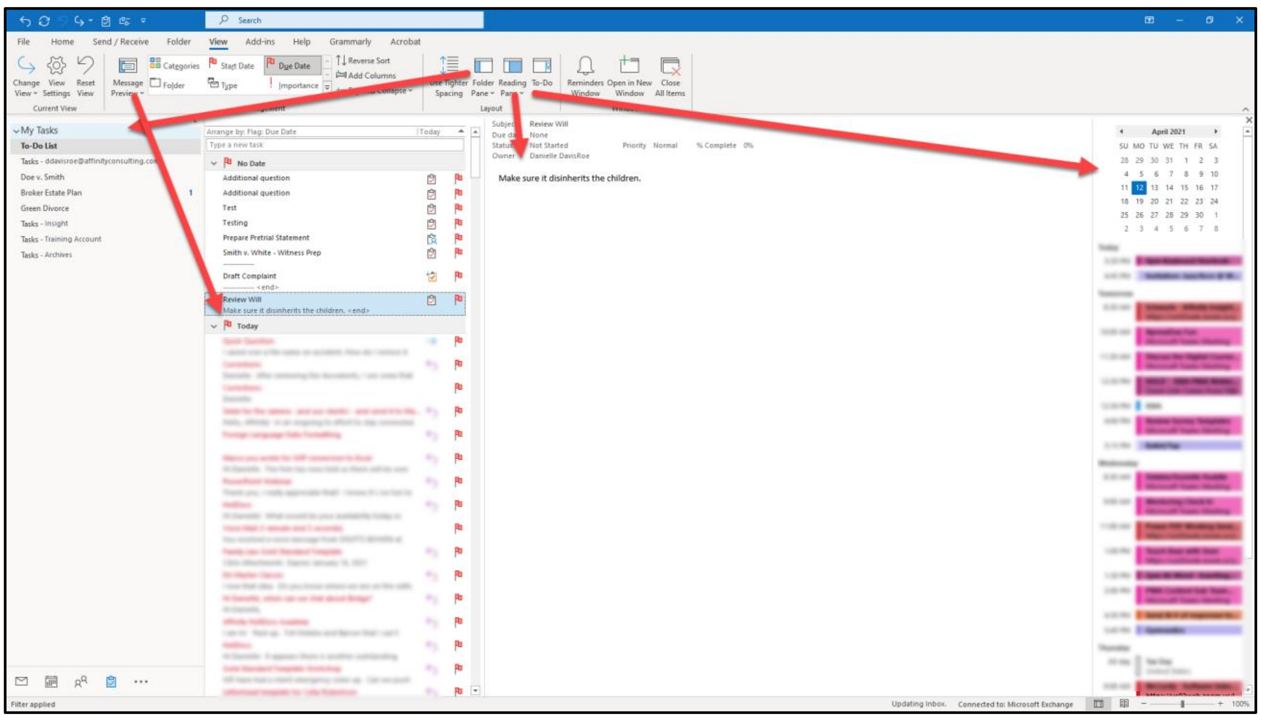

FIGURE 12-1

Tasks vs To-Do List

A task is a separate item in a task folder. One or multiple task folders can be created (for example a task folder could be created for an individual project). The To-Do List aggregates all of the flagged items (emails) and all of the tasks from all of the folders into one list. Think of the To-Do List as a “master task list.”

Creating Tasks

Click **New Task** on the **Home ribbon** or drag and drop email to Task button or screen.

Setting Task Reminder

Check the Reminder box below the task end date and set a reminder date and time.

Hiding Completed Tasks

To hide completed tasks, click **View Settings** on the task **View ribbon**, then **Filter**, then **Advanced**, and add **Complete equals No** to the list.

Assigning Tasks

Open the task, click Assign Task, enter an email address, and click send. The Assignee now becomes the owner of the task and is the only one that can make changes to it. The Assignee can also send status reports back to the Assignor. There is a built-in view under **Change View** to view assigned tasks in a folder.

Flags

Flagging an email will make the email appear in the To-Do list, but that is not the same as creating a task. A flagged email will disappear off the To-Do list if the email is deleted. However, a task created from an email (via drag and drop) creates a separate task item, independent of the email. An independent task item will stay on the task list even if the original email is deleted.

Flags are a great way to alert you to follow up on an important email, especially if your plan is to delay action with the email for a day or so. Simply right click on the desired email and select **Follow Up** and then select the desired follow-up flag.

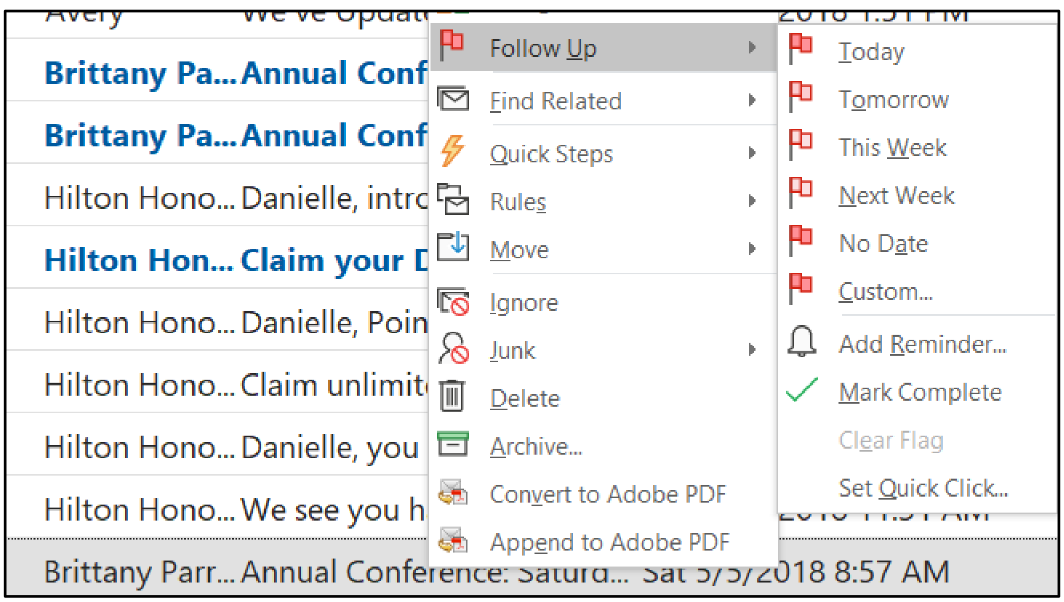

FIGURE 12-2

You can set a custom date as well. Outlook will notify alert you on the date and time specified.

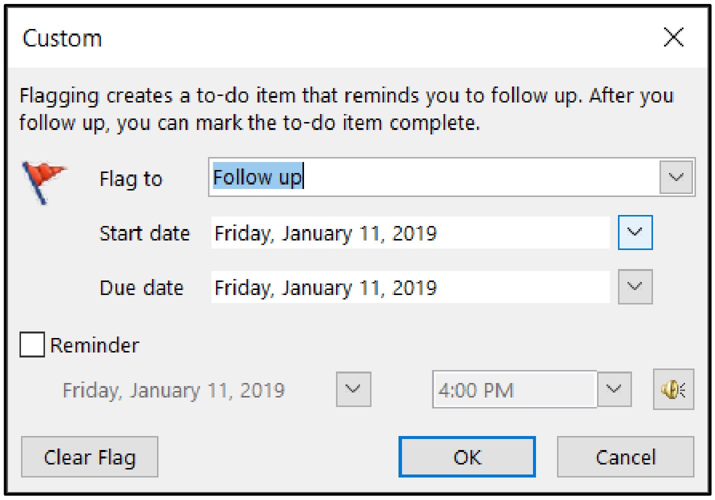

FIGURE 12-3

CHAPTER 13
MICROSOFT TO DO

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Microsoft To Do is the online and app interface for Outlook tasks. Use To Do in tandem with Outlook tasks or without ever using tasks in Outlook. You can access it by logging into office.com, using the Windows app, or downloading the app to your mobile devices. To Do is available within Outlook for 365 users, by clicking on the navigation button.

Interface

To Do is organized into smart lists and lists, available from the navigation pane on the left-hand side.

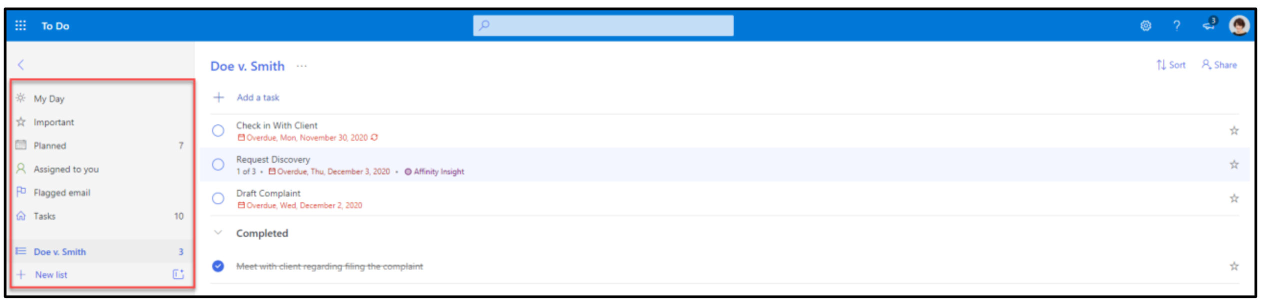

FIGURE 13-1

To collapse the navigation pane to just icons, click on the **< button** at the top of the pane.

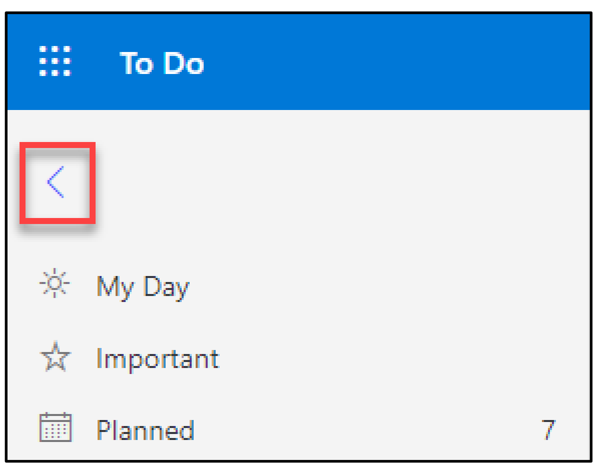

FIGURE 13-2

Task Details

To open the task pane to view details about a task, click on the name of the task.

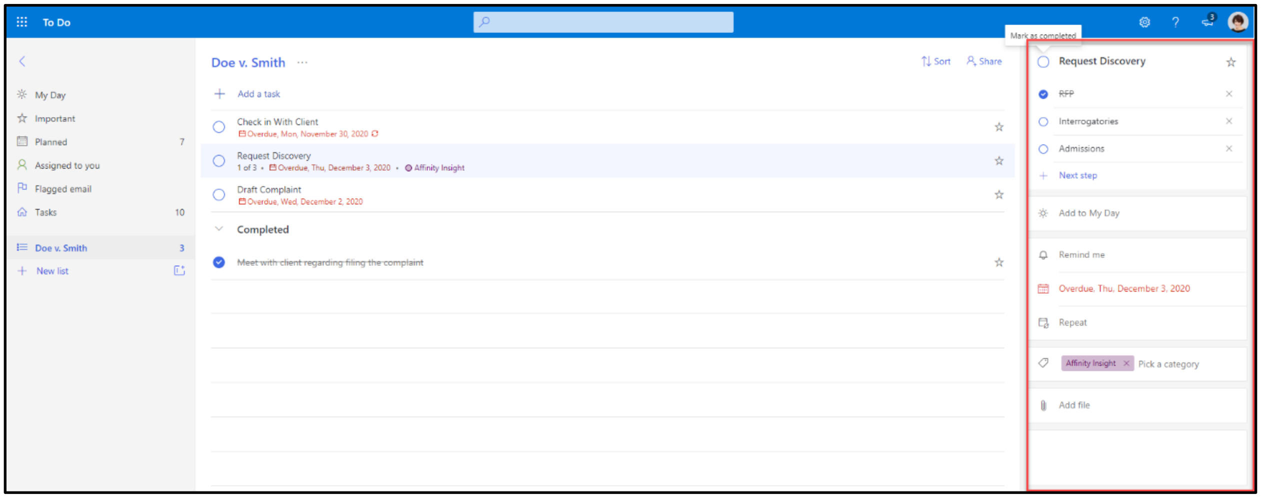

FIGURE 13-3

Sync Between Outlook and To Do

Tasks automatically sync between Outlook and To Do. Tasks added in Outlook will automatically appear in To Do and vice versa. However, not all of the fields and options sync between the two.

What Syncs

The task name, due date, reminder, details, attachments, recurrence, categories, priority/importance, and folder/list sync between Outlook and To Do.

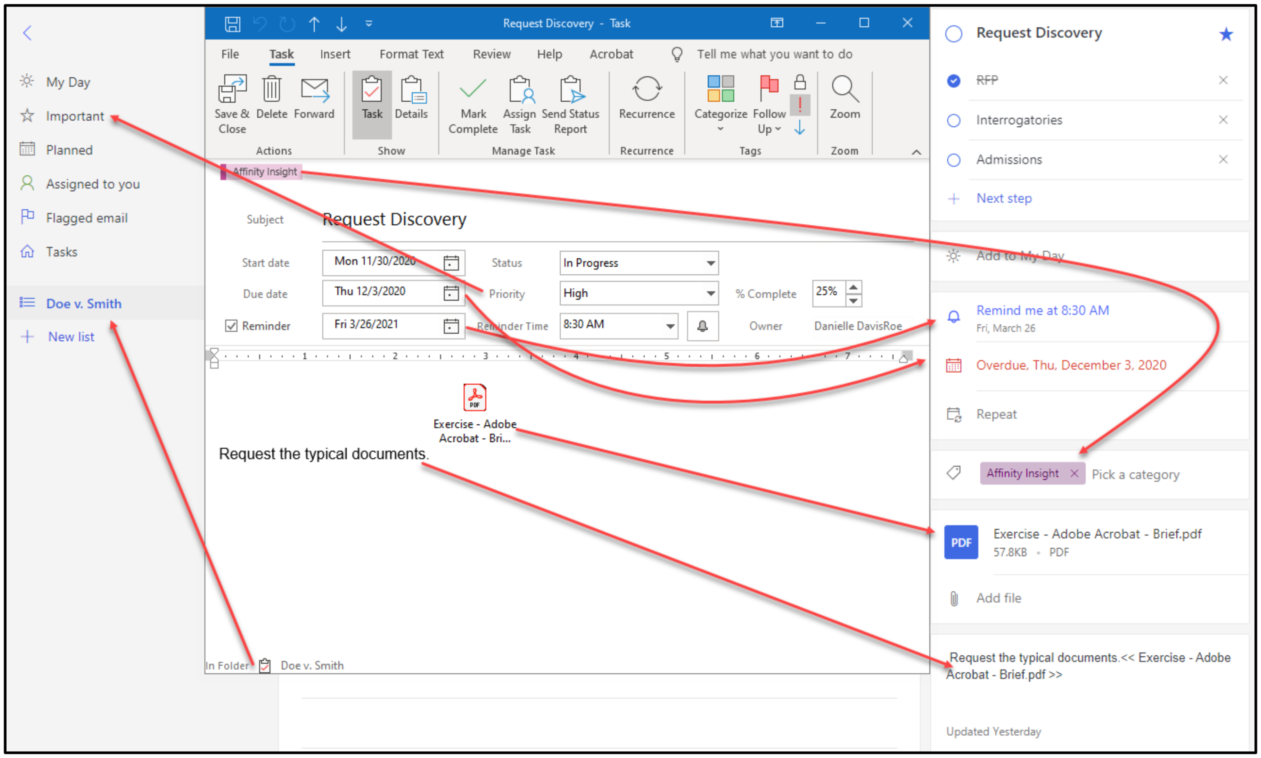

FIGURE 13-4

What Doesn't Sync

Outlook's start date, status, and percent complete do not sync with To Do. To Do's steps do not sync with Outlook.

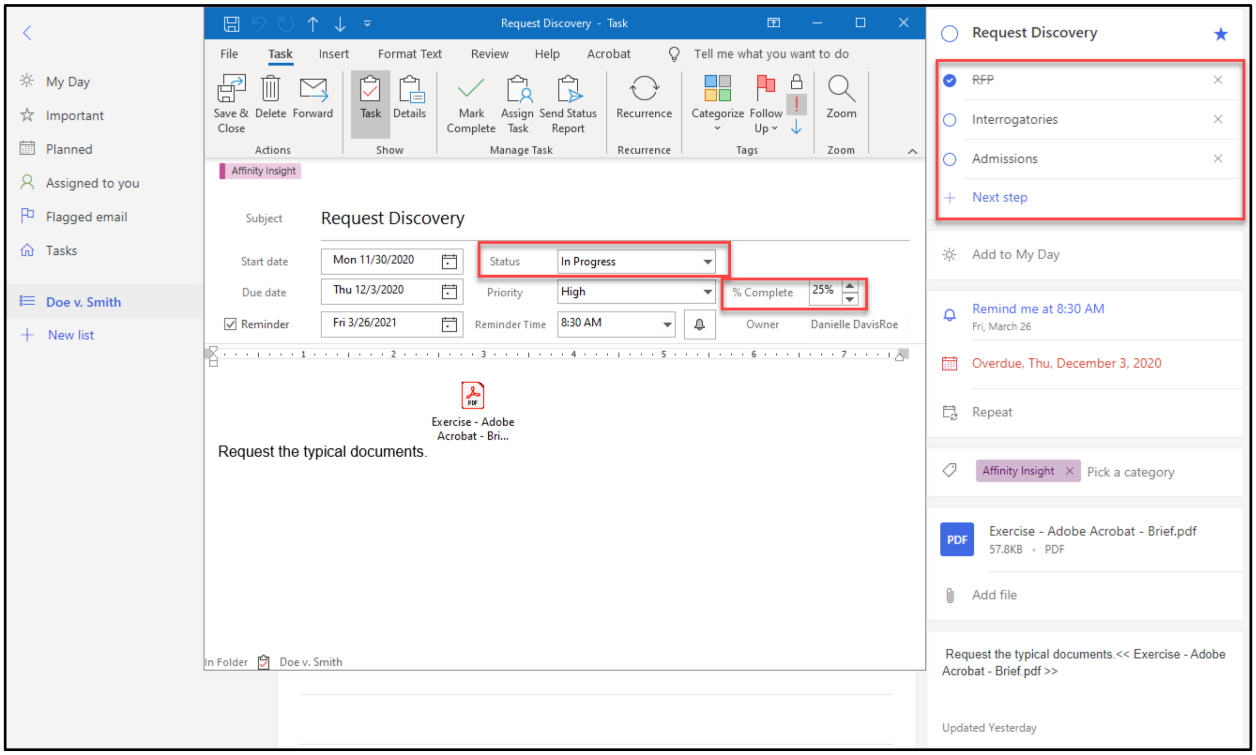

FIGURE 13-5

Right-Click Menu

Right-clicking on a task pulls up a menu that lets you add the task to my day, mark it as important, mark it as complete, set the due date to today or tomorrow, create a new list from the task, move the task, copy the task, or delete the task.

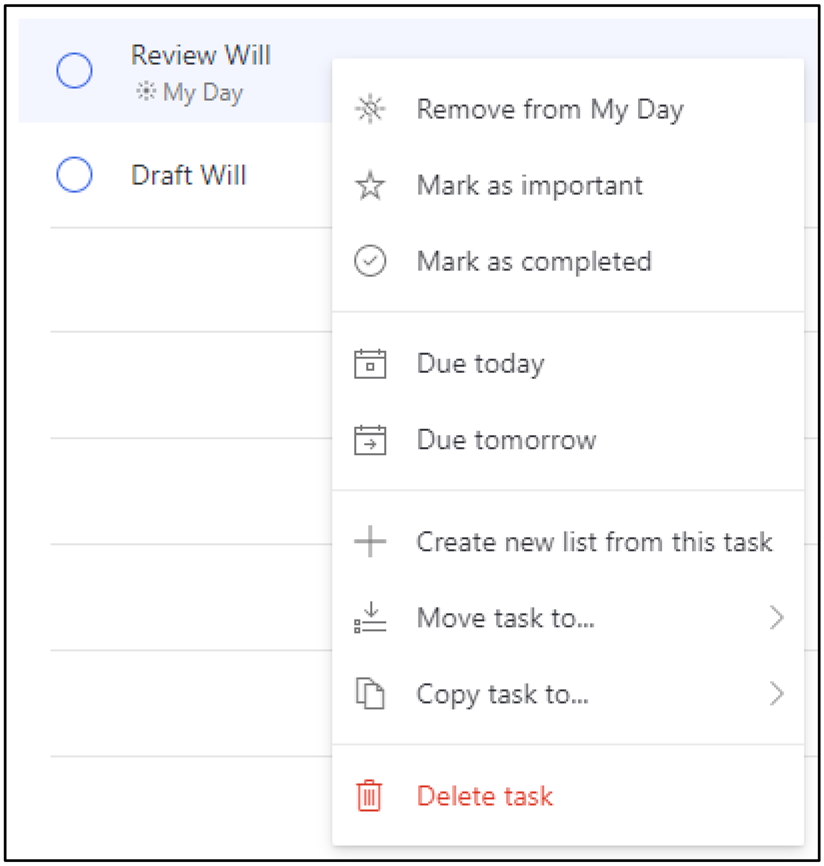

FIGURE 13-6

If nothing happens when you right-click, enable the right-click menu. Click on the **gear icon** in the upper-right corner and open your settings.

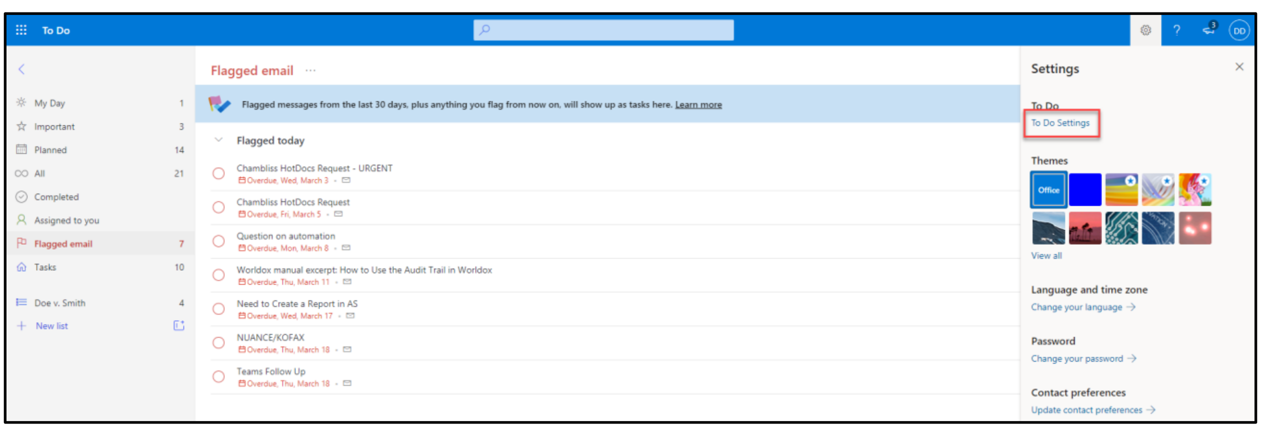

FIGURE 13-7

Under **General**, toggle on **Show right-click menus**.

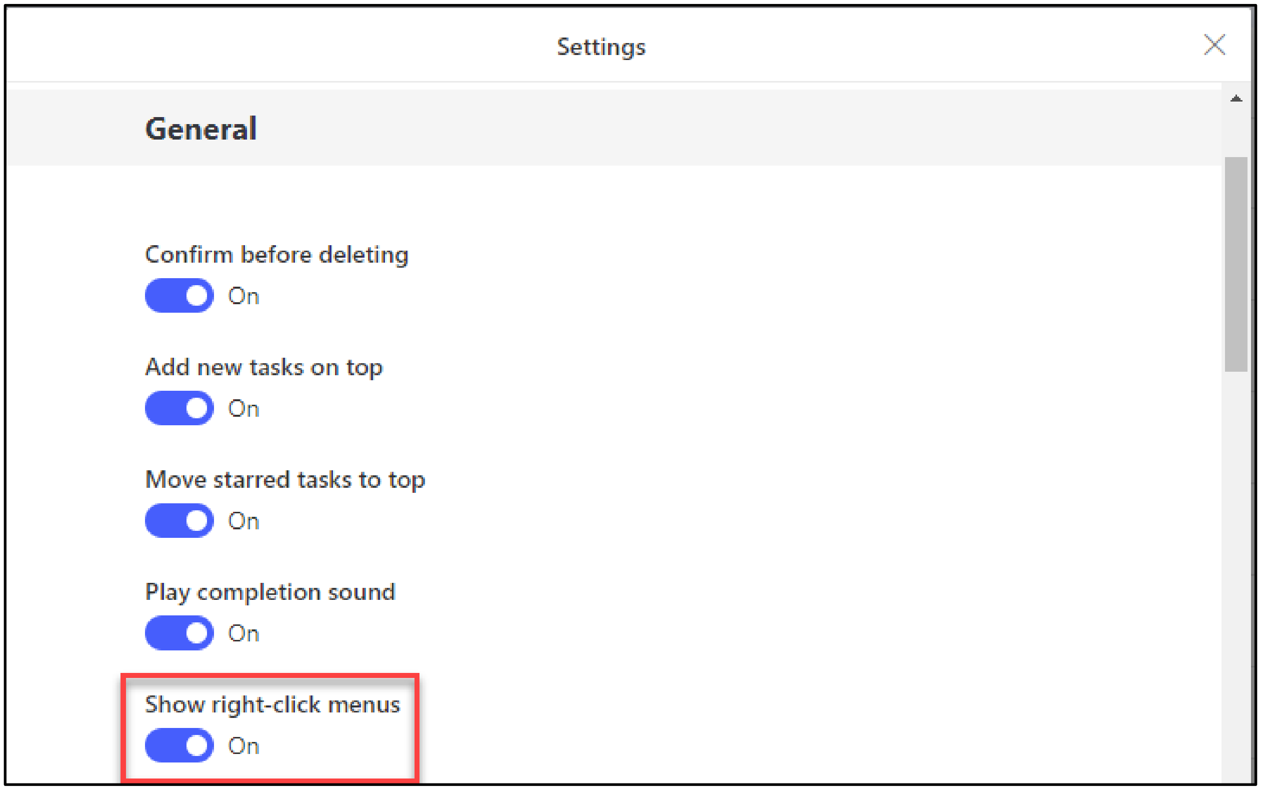

FIGURE 13-8

Smart Lists

If you're unable to all of the smart lists listed below, click on the **gear icon** in the upper-right corner and open your settings.

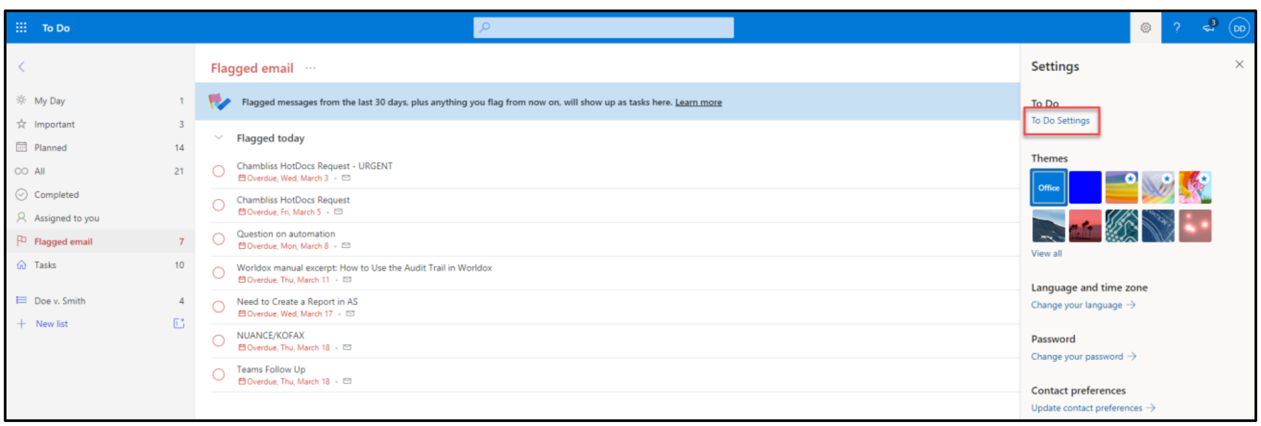

FIGURE 13-9

Toggle on the smart lists you want to see and toggle off **Auto-hide empty smart lists**, if you want to see each list regardless of whether anything is in it (allowing you to drag-and-drop tasks to many of the smart lists).

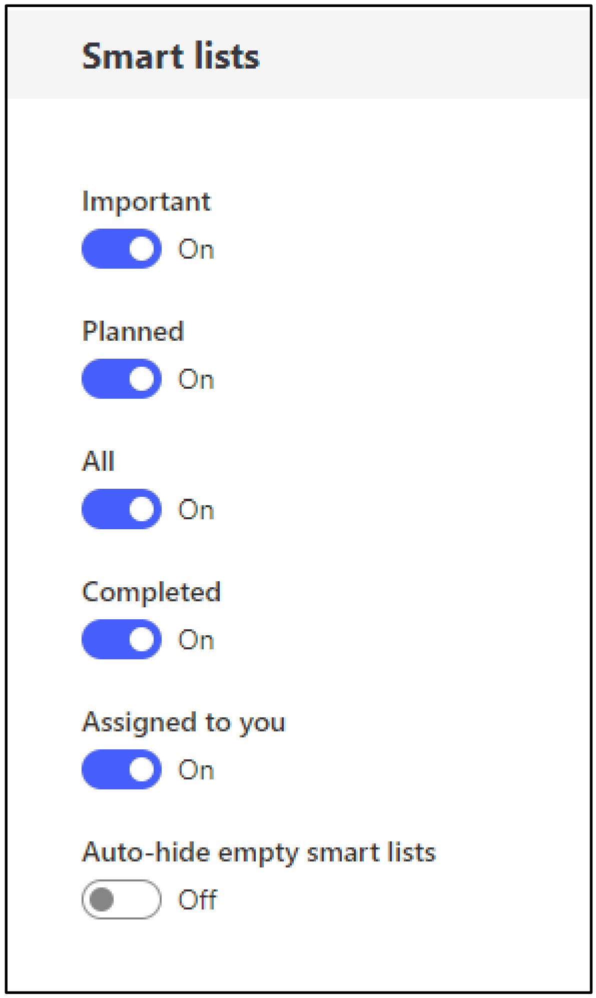

FIGURE 13-10

My Day

My Day resets every day. Start your day by selecting which tasks you want to focus on and adding them to My Day to help you focus on today's priorities. Unfinished tasks remain on the task list, they just disappear from My Day at the beginning of the following day.

To add tasks to My Day, either drag and drop the task onto **My Day** in the navigation pane or click on **Add to My Day** in the task detail pane. You can also right-click on a task and select **Add to My Day**.

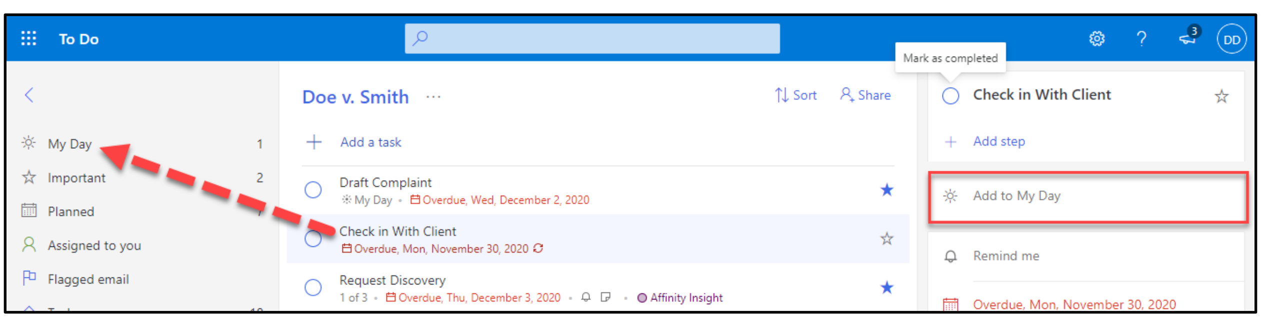

FIGURE 13-11

My Day can be sorted by importance, due date, alphabetically, or creation date by clicking on **Sort**.

Important

Tasks marked as high priority in Outlook show up under **Important** in the To Do navigation pane (as well as under Tasks and a list, if applicable). To add a task to the Important list in To Do, either drag and drop the task onto **Important** in the navigation pane or right-click on the task and select **Mark as important**. You can also click on the **star** to the right of the task.

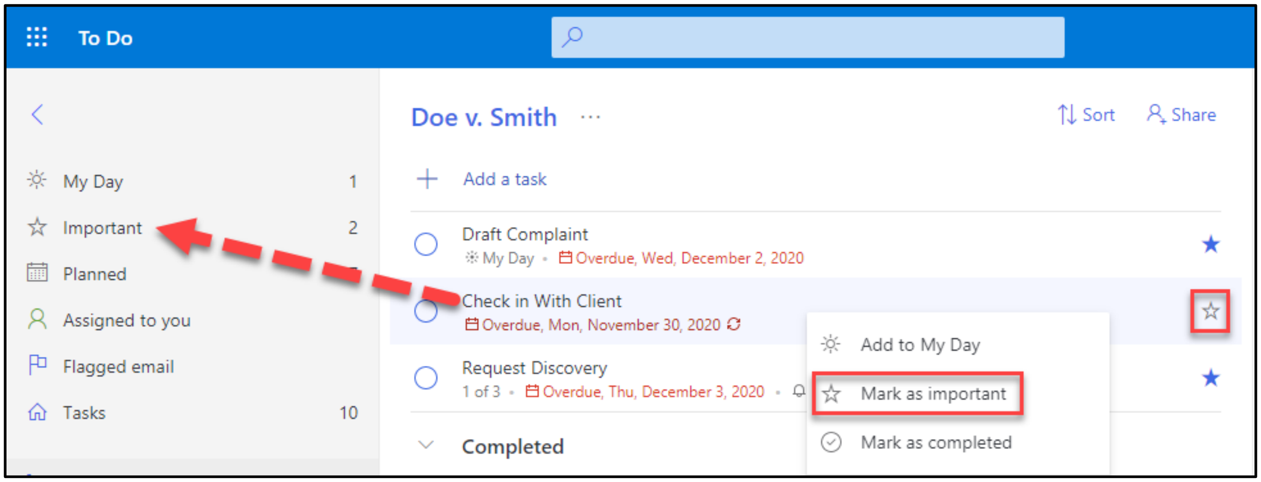

FIGURE 13-12

Planned

Tasks with deadline appear under **Planned** organized by deadline. Overdue tasks appear at the top under **Earlier**. Tasks due today show up under **Today**, tasks due to tomorrow show up under **Tomorrow**, tasks due in the next week (other than ones due today or tomorrow) are under a date range, and everything due father out shows up under **Later**.

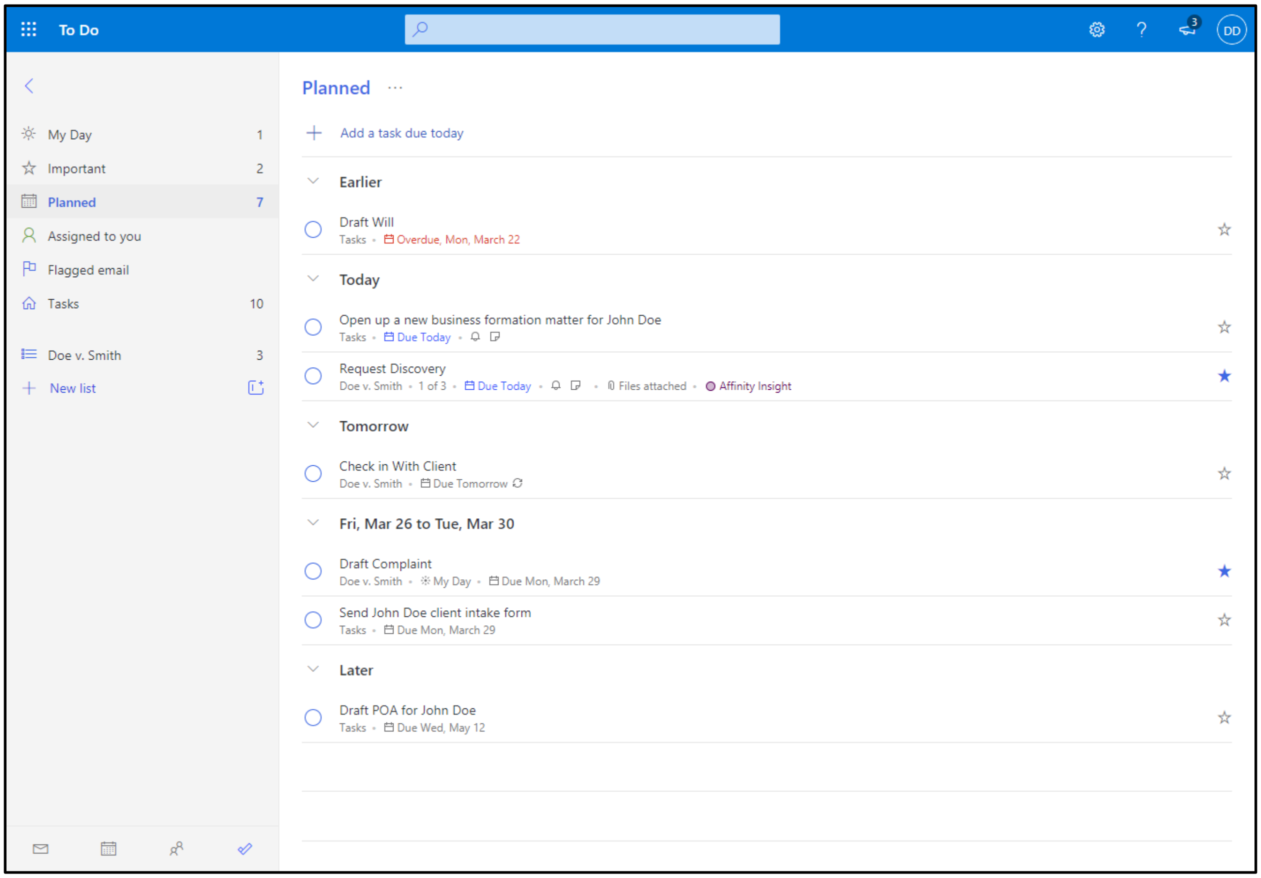

FIGURE 13-13

All

All of your tasks created in Outlook or To Do, tasks assigned to you Microsoft Planner or through a shared list in To Do, and flagged emails show up under **All**, organized by type and list.

Completed

Tasks marked as complete show up under **Completed**, organized by type and list.

Assigned to You

Tasks that are assigned to you in Planner or in a shared task list in To Do, appear in the **Assigned to You** smart list. Tasks delegated to you in Outlook do <u>not</u> show up here - those show up under **Tasks** (see below).

Flagged Email

Emails flagged in Outlook show up under **Flagged email**. Flagged emails can be sorted by importance, due date, added to my day, alphabetically, or creation date by clicking on **Sort**.

Tasks

All Outlook and To Do tasks other than those assigned to by planner or in a shared list, appear under **Tasks**. can be sorted by importance, due date, added to my day, alphabetically, or creation date by clicking on **Sort**.

Lists

Lists allow you to categorize tasks by matter, type of task (ex: business development, active matters, and personal), or team (for shared lists). Tasks on lists also appear in smart lists (as described above).

Creating New Lists

To create a new list, click on **+ New List** at the bottom of the navigation pane, type the name of the list, and hit the enter key on your keyboard.

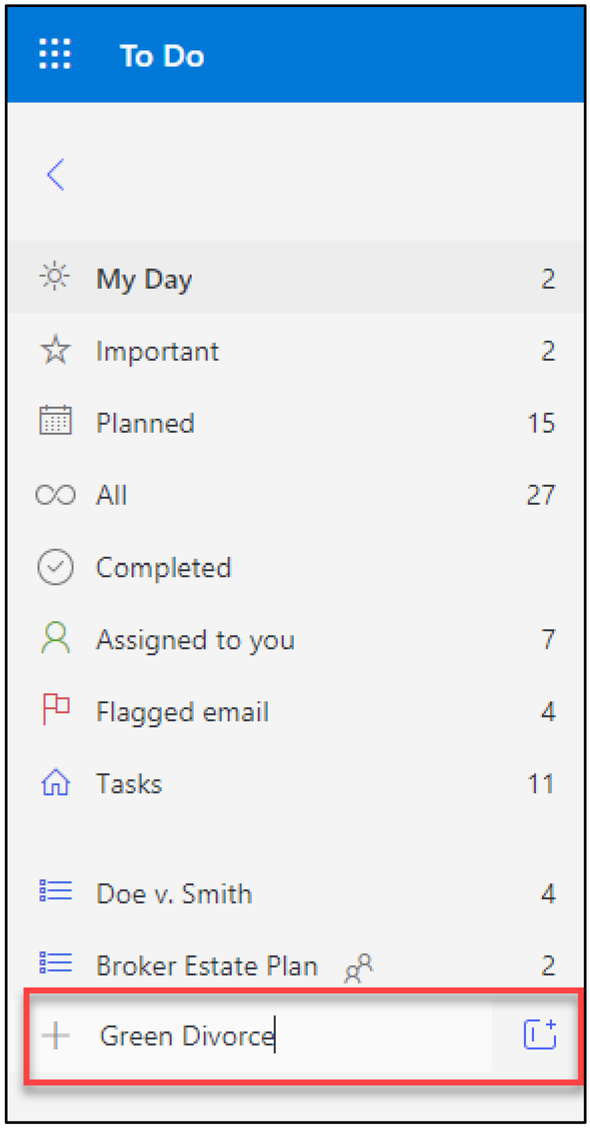

FIGURE 13-14

Sync with Outlook Task Folders

Lists that you create in To Do automatically appear as folders in your Outlook tasks. Folders you create in Outlook tasks automatically appear as lists in To Do.

Shared Lists

Sharing Lists

Lists can be shared with others in your organization, allowing tasks to be delegated through To Do. To share a list:

1. Open the list by clicking on it in the navigation pane.
2. Click on **Share**.

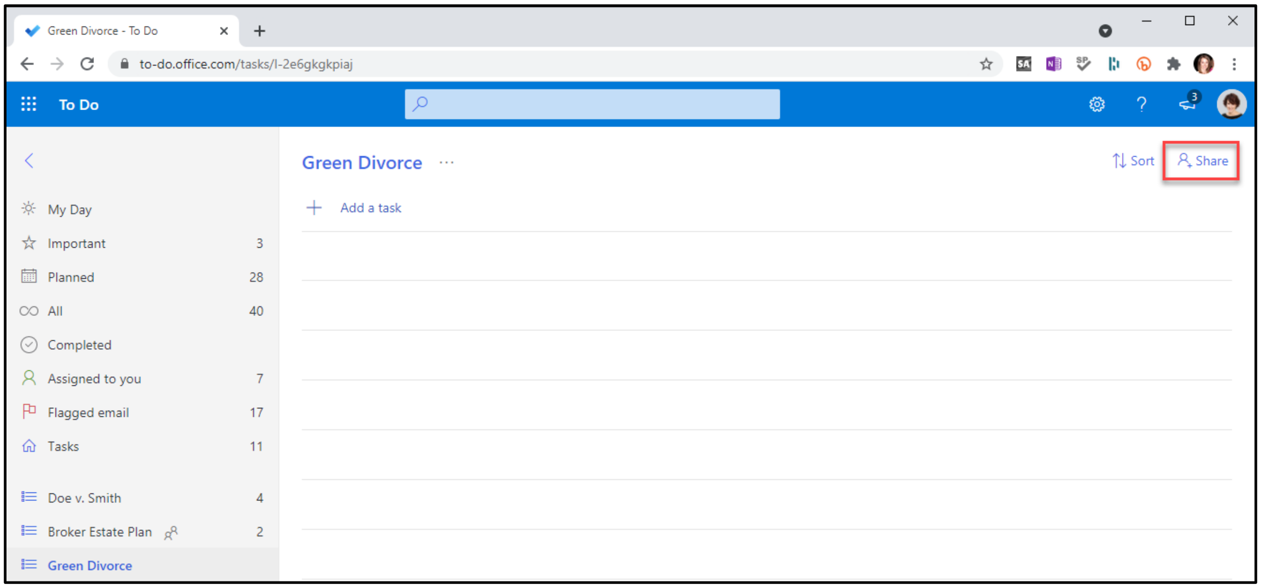

FIGURE 13-15

3. Click on **Create invitation link**.
4. Share the link by inviting people via email or copying the link.

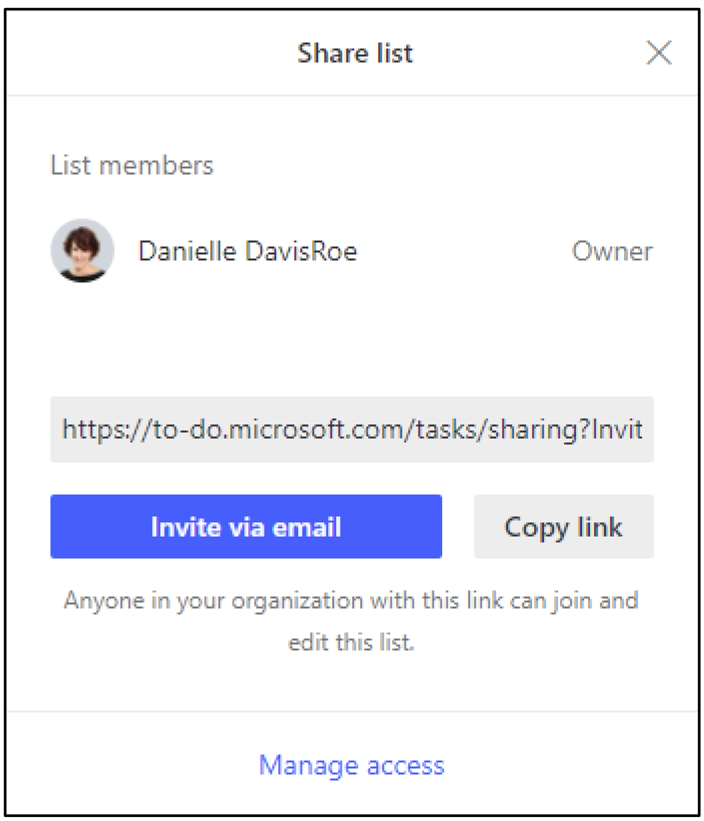

FIGURE 13-16

5. Those who click on the link will be granted access to the shared list.

Once a list is shared, anyone in your organization with the link can join the list.

Remove List Members

To prevent remove members from the list:

1. Open the list by clicking on it in the navigation pane.
2. Click on the sharing button.

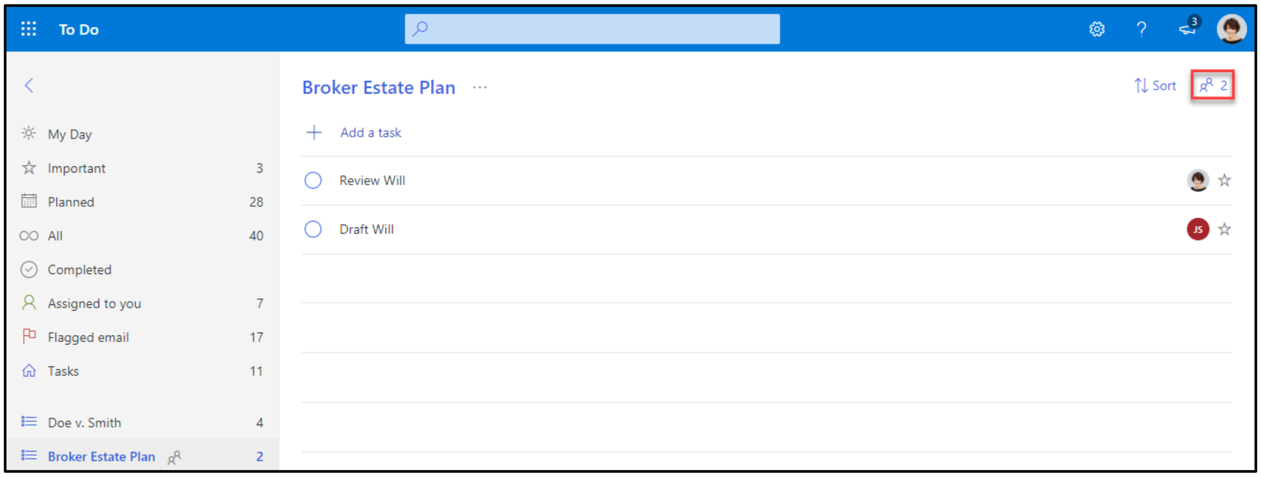

FIGURE 13-17

3. Click on the **x** next to the name of the member to be removed.

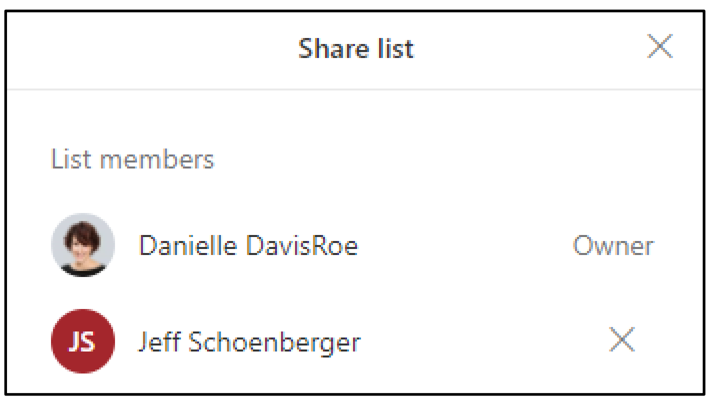

FIGURE 13-18

Prevent New List Members

To prevent additional people from becoming members of a list:

1. Open the list by clicking on it in the navigation pane.
2. Click on the sharing button.

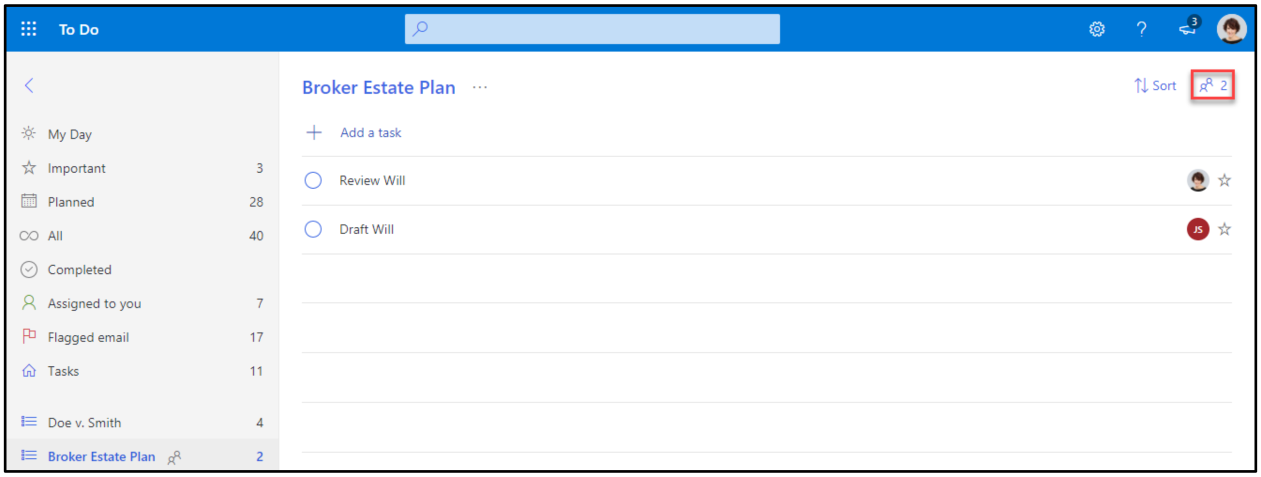

FIGURE 13-19

3. Click on **Manage access**.

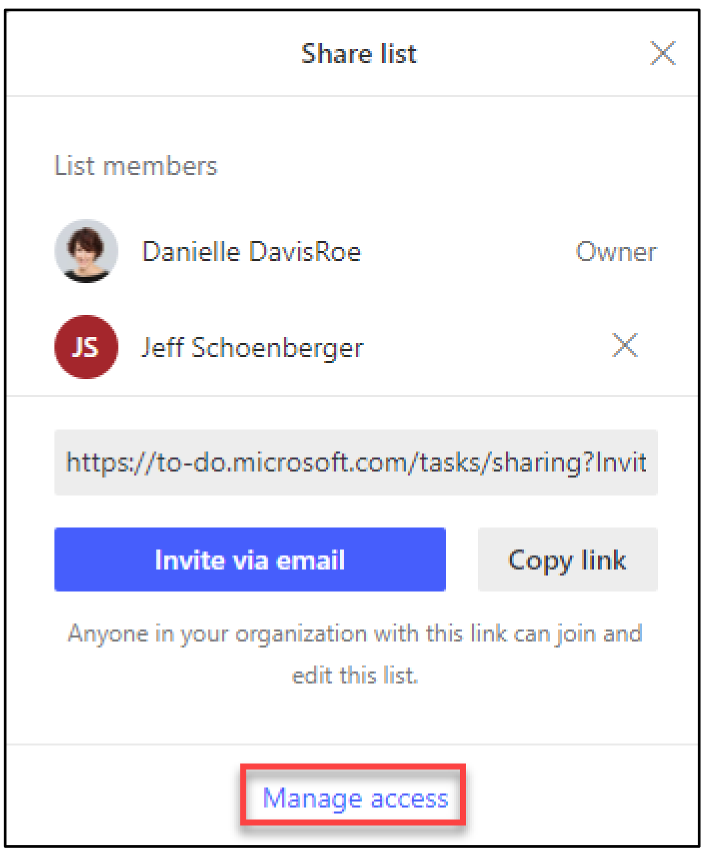

FIGURE 13-20

4. Toggle on **Limit access to current members**.

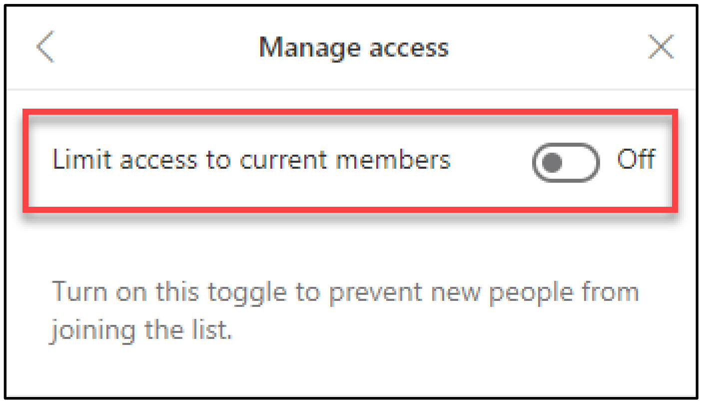

FIGURE 13-21

5. Click **Limit access**.

Stop Sharing

To stop sharing a list altogether:

1. Open the list by clicking on it in the navigation pane.
2. Click on the sharing button.

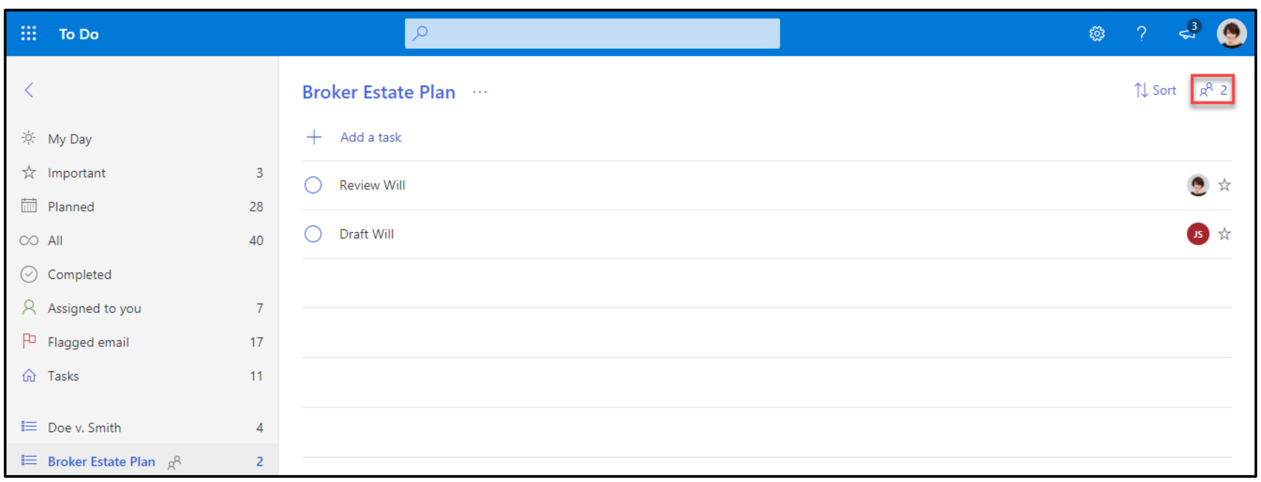

FIGURE 13-22

3. Click on **Manage access**.

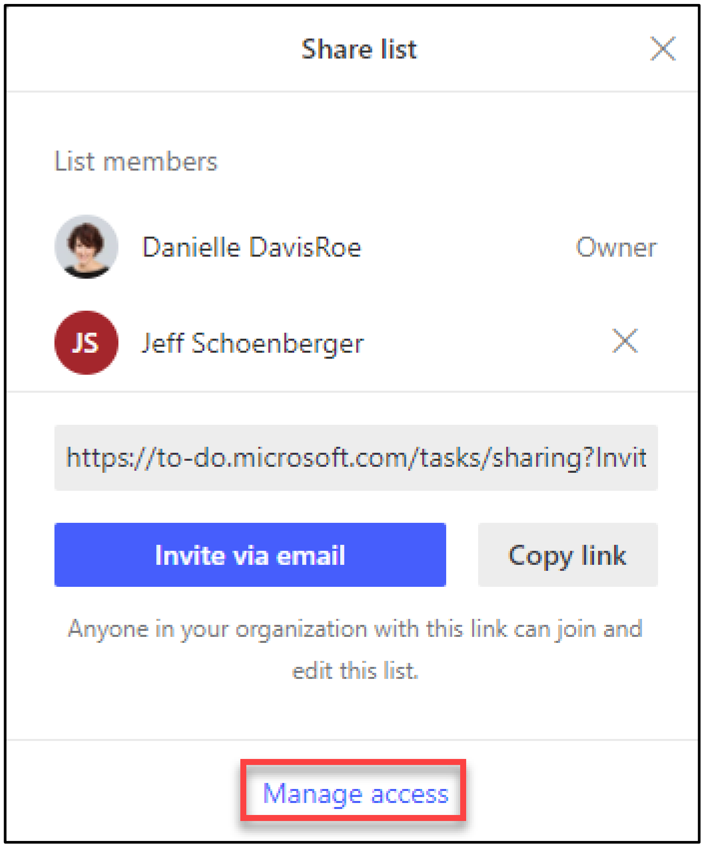

FIGURE 13-23

4. Click on **Stop sharing**.

CHAPTER 14
CATEGORIES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Categories you to color code or tag an appointment, email, contact, or task with a named category which has a color assigned to it. These are particularly helpful with appointments; assigning a category to an appointment turns the entire appointment the color of the category. You can also sort by category which can be useful with email.

Create Categories

Let's say you want to create a category called Billed which you will assign to each appointment on your calendar AFTER it is billed. Just follow these steps:

1. Right-click an appointment you have billed.
2. Choose **Categorize** ➔ **All Categories**.

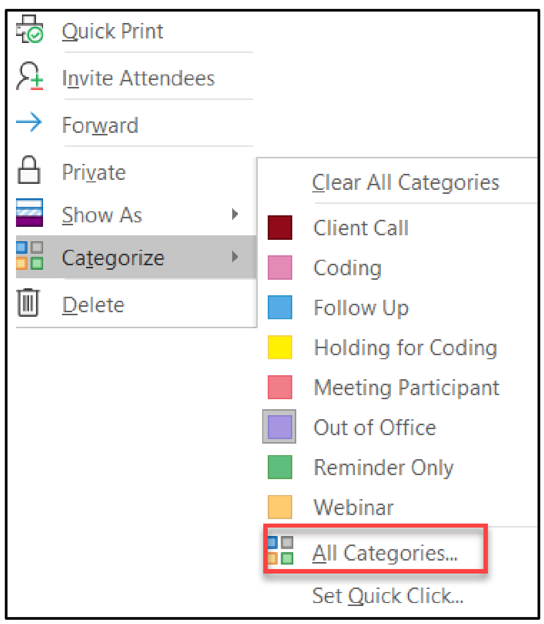

FIGURE 14-1

3. Click the **New... button** and create a category as follows:

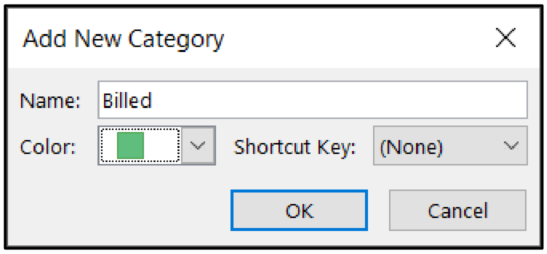

FIGURE 14-2

4. Click **OK → OK**.

Apply Categories

Right-click on an item. Under categorize, select the desired category. You can apply more than one category. If more than one category is applied to an appointment, the additional colors will be shown as small boxes.

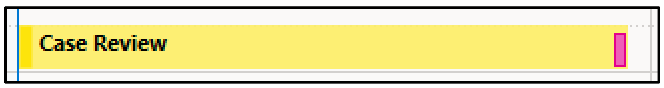

FIGURE 14-3

CHAPTER 15
SEARCHING

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Quick Search

In Outlook 2013/16 At the top of each mail folder, you'll see a box like the one below:

FIGURE 15-1

In 2019/21/365, you'll see a search bar at the top of the application.

FIGURE 15-2

This will search for words you type in the email address or body of any email contained in that folder.

The Search contextual tab will also appear, providing additional options.

Advanced Search Capability

Advanced search gives you a tremendous number of options for searching through Outlook. Hit **Ctrl + Shift + F**.

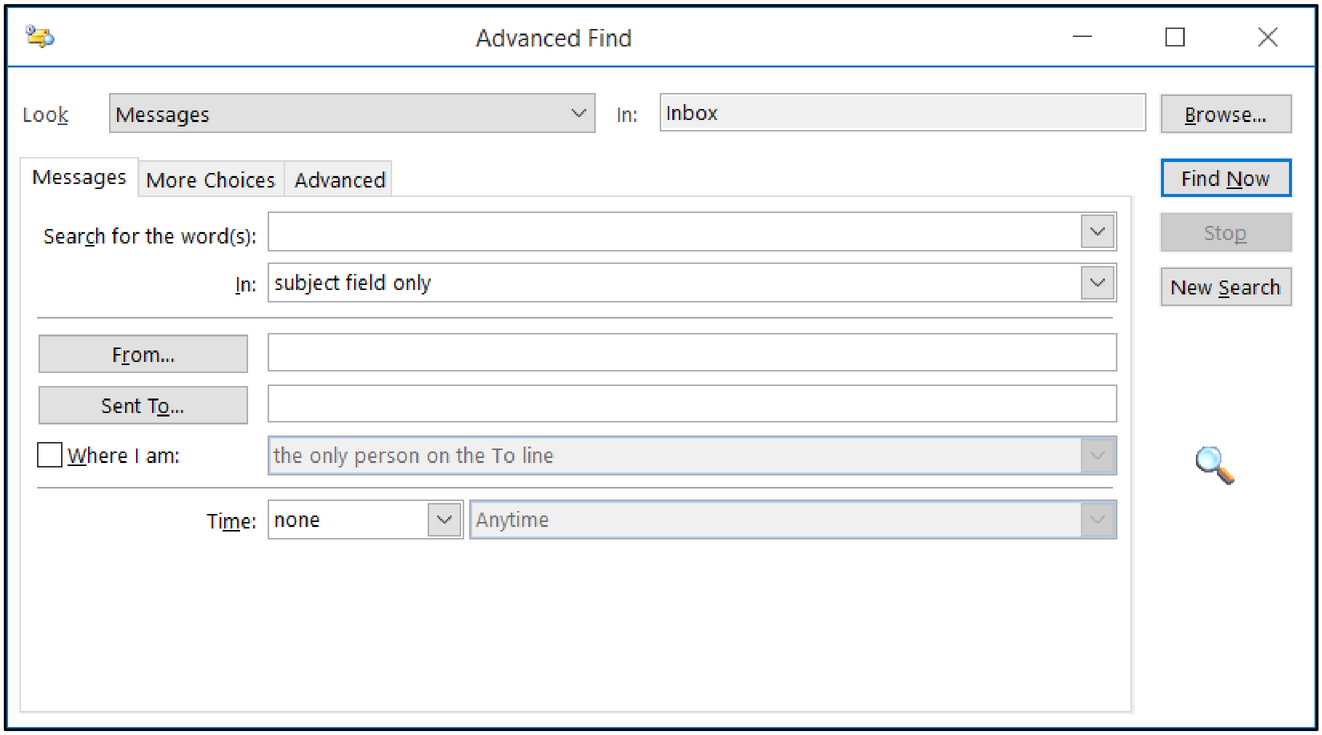

FIGURE 15-3

Search Folders for Repetitive Searches

Use search folders to reuse the same search over and over.

Creating Search Folders

To create a search folder:

1. On the **Folder ribbon**, click on the **New Search Folder button**.
2. Under **Custom**, select **Create a custom Search Folder**.
3. Click on the **Choose... button**.
4. Name the Search Folder.
5. Click on the **Criteria... button** to set up the search.

Using Search Folders

Search folders appear in the **Folder Pane**, on the left-hand side. Click on the folder name to repeat the search.

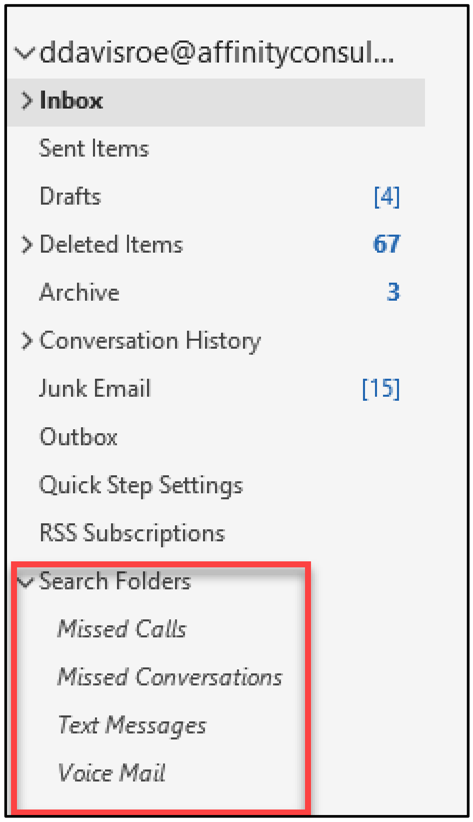

FIGURE 15-4

Editing Search Folders

To edit a search folder:

1. In the **Folder Pane**, right-click on the name of the folder.
2. Click on **Customize This Search Folder…**

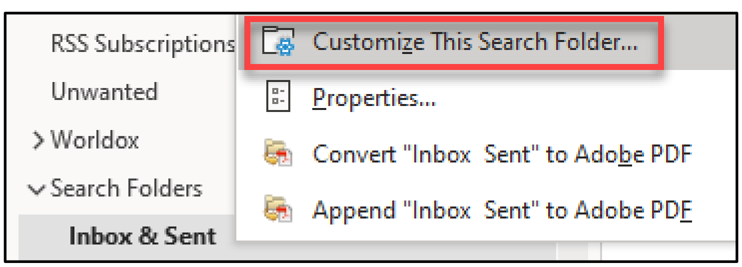

FIGURE 15-5