

**Excerpt from Michael Linenberger's
Total Workday Control Using Microsoft Outlook
3rd. Edition (released March 2011)**

Lesson 5: The Bliss of an Empty Inbox

Introduction

I am about to describe an action, the benefits of which are almost magical. I say magical because, whenever I do it, I cannot really explain why it works so well, but it always leaves me in awe. This magical thing is emptying my Outlook Inbox. Even today, every time I do it, I am left feeling amazed. Amazed at what a difference it makes. Amazed at the refreshed feeling I experience each time, the reduction in Inbox stress, and at my resulting eagerness to move forward with my work and even to get new e-mail.

All that joy really does not make sense. After all, all I am doing is dragging a group of e-mail en masse from one folder to another. I usually don't even classify or file it into different folders. I really haven't done anything with that mail, other than having previously extracted tasks from it when I first read it, and making one last scan of titles to ensure that I didn't miss anything.

And yet a remarkable change occurs as soon as I drag the mail. All the tension and uncertainty associated with e-mail I've been getting all day instantly disappears. Questions like Have I read it all? Did I forget to reply to anyone? Is there a time bomb in here? Am I leaving something undone? All those are gone when I glance at my empty or near-empty Inbox. It clears my psyche by clearing one big block of my day's open ends.

That is such a refreshing feeling, to know there is nothing lurking in there. Emptying the Inbox provides that very clear, almost symbolic statement: "I am done with it all, and I can move on."

The Real Purpose of the Inbox

There is some history here. There is a reason why Microsoft called the place where Outlook stores your incoming mail the “Inbox.” You may recall the old two- or three-level tray systems office workers used on their desks to process incoming paper mail. Some still do. While these systems varied, the top box was always called the “In Box” or “In Tray.” And the meaning of this box was simple: it was where new, unprocessed paper mail and memos were placed. And the rules of most of the systems were this: as soon as you picked up and read an item from the In Tray, it never went back to the In Tray. Rather, it was filed, or disposed of, or placed in one of the lower boxes indicating that the item was “in process” or “ready to be filed.” There was great value to these systems and they generally worked well if you knew how to use them.

This idea of using the Outlook Inbox in a similar way, as a place only to receive new unread items, has unfortunately been lost by most users of e-mail. The Inbox now not only has that receiving function but has also become the place to store previously read “in-process” mail that you have additional actions in mind for, as well as being a bulk filing location for old mail. No wonder the Inbox has become so useless for so many people. You just cannot mix all these functions together and hope to make sense of your e-mail.

As I stated in Lesson 1, you really want to get the Outlook Inbox back to the receiving-only function; otherwise the Inbox becomes hopelessly cluttered. A cluttered Inbox represents a congestion of unattended responsibilities. Emptying the Outlook Inbox every day relieves that congestion in a very noticeable way. It also makes you more efficient, because without clearing your Inbox you’ll be constantly glancing through old mail in search of passed over to-do’s and unfiled information. Emptying the Inbox helps prevent responsibilities buried in e-mail items from getting away from you. It saves you time because it allows you to clearly delineate between the mail that needs further processing and mail which you no longer need to read.

Note: Having less mail in your Inbox also helps when later using a mobile device, since it synchronizes faster and leaves you less mail to scroll through when finding new mail.

Four Ways to Empty the Inbox

There are four ways to empty the Inbox daily, only one of which I will cover in this early lesson.

- ▶ The first is to toss it all. This most likely is not an option for you, but I mention it for completeness and because for many people it is a partial solution.
- ▶ The second is to do what most people who file do, and that is to distribute mail among multiple topic-named Outlook folders. It is neat, logical, and matches what we do when we file physical papers in manila file folders.

- ▶ The third is to file all mail, in bulk, into one other location, either ignoring topics or optionally applying topic-like “tags” to the mail in that location. Doing the first part of this is the focus of this lesson. The latter I save for Lesson 8.
- ▶ And the fourth is a combination of some or all of the above.

Focus on Filing in Bulk

In this early lesson, I am only going to teach you the third of these methods, and only the first part of that: how to file in bulk. I feel this is the simplest and most practical way to empty the Inbox. Filing in bulk is a method that nearly everyone can do, and it is the quickest way to empty the Inbox every day. It also can be combined with topic filing into multiple folders, the method that many of you are doing now. And in Lesson 8, I’ll show you a different topic approach that uses topic-named Outlook tags added to the bulk-filed mail. But that comes later. The very first step is simple: how to empty your Inbox every day, and declutter your life.

If You Are Already Filing Mail

If you have an existing filing system and it is working for you, *and you are emptying your Inbox every day*, you can skip the rest of this lesson and begin reading Lesson 6. You should be proud that you have mastered this and you should stick with it—there is no need to change.

Unfortunately though, many people with seemingly good filing systems in fact find it nearly impossible to empty their Inbox daily, usually because the system takes too long to do it. So if you are unable to empty your Inbox every day using your filing system, I encourage you to read on and give this new approach a try. The benefits of achieving that empty Inbox every day are just too good to pass up.

A Very Simple System: Drag All Mail to the Processed Mail Folder

A Simple Solution

The first step of the Master Your Now! (MYN) e-mail filing system, the step covered in this lesson, is so simple it is almost silly. It is just this: create one folder called Processed Mail, and every day, after you have extracted all tasks from mail in your Inbox (more on that later), and read or replied to those you want to, drag all of your mail from the Inbox to that folder. That’s it! I’ll discuss how to create the folder below.

In its simplest form that really is it; you merely leave all the mail in the Processed Mail folder, and you are done. There are exceptions and complications of course, which I will mention below and in Lesson 8, but they are not so bad. For most users, what I just described—simply dragging all mail to one

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folder — is all you need to do. It is a very quick and simple system. Now let me explain why this is so powerful.

- ▶ It's simple and easy to do. This ensures that you will do it every day.
- ▶ It gets you quick results. As you can tell, I am passionate about an uncluttered Inbox and I want you to be able to get there quickly one or more times a day.
- ▶ When you leave all your old mail in the Processed Mail folder, you have all the benefits of a single date-sorted storage location for your e-mail, just like the Inbox (more on that ahead).
- ▶ It sets you up well for filing or tagging topics, covered in Lesson 8.
- ▶ And best of all, your Inbox is freshly emptied, one or more times a day (this is worthy of repeating).

Three Other Reasons to File Mail

Let's step back a moment. I have emphasized filing mail out of the Inbox primarily to achieve a clean and refreshed Inbox and to enjoy the benefits of that. Here are three additional reasons to file mail:

- ▶ To encourage you to do final processing of your Inbox every day. This is important. Just before I file my mail into the Processed Mail folder, I take one last scan of my e-mail titles. I do this to see if I missed anything; when I read new mail on and off during the day it is easy to skip some and I often do. This scan prevents me from dropping important items, whether task conversions, important replies, scheduling events, or anything else important that might arrive by e-mail. The bliss of an empty Inbox is dependent on that scan, so I make certain to do that scan.
- ▶ To solve any space limitations you may be reaching in your Inbox. This is the reason most people want to file or toss mail.
- ▶ To make it easy to find the mail you file, if you need to see it again. This is the reason most people get serious about choosing a good filing system; otherwise they would just toss away all their previously read mail. Let's talk more about this point — finding mail after it is filed — as it's a big topic.

Five Ways of Finding Mail After It Is Filed

I am a pack rat; I tend to save all my business e-mail. My theory on saving most mail is this: storage space is much cheaper than the time it takes me to confidently decide that I can throw an e-mail away. Sure, if the mail is obviously spam or junk, I delete it immediately. But if I have any hesitation about tossing a business-related item, I retain the mail and move on. My time is just too valuable, and I suspect yours is too.

This means when I go looking for mail I have quite a bit of mail to sort through. However, using the Processed Mail single-folder system, I can actually *find mail easier*. With this single-folder system, there are five different ways you can find your mail:

1. You can find it the same way you find mail now when you leave it in your Outlook Inbox: visually. One great advantage to the Processed Mail folder system is that it gives you one long list of all your mail, just like the Inbox, so you can visually scan down your e-mail list, searching backward in time. This is not such a bad way to search for mail, particularly for mail less than two or three weeks old, which is the mail you are most likely to search for on any given day. You can use dates and adjacent e-mail titles to reconstruct events and determine approximately when the mail arrived, and usually find it fairly quickly. Or you can sort on the From column (just click the column header) and search for all mail sent by a sender; that's another way we often search for mail.

The utility of a single list of mail is one reason why I think many people do not file mail out of their Inbox. Even if they want to file it, they unconsciously know leaving it in the Inbox is a pretty good means of keeping recent mail searchable (it is just a bad place to leave mail for other reasons). Losing the power of a single list is also the main reason multiple topic-named folders for filing mail is not my preferred method; they preclude me from doing these sorts of visual one-stop searches (I list other disadvantages of using multiple topic-named folders in Lesson 8).

2. In addition to doing a visual search, you can use Outlook's search engine on the Processed Mail folder. If you use Outlook 2007/10 or Outlook for Mac 2011, this approach is excellent. In those versions, Microsoft integrated a fully indexed search engine into Outlook (called Instant Search in Windows and Spotlight in the Mac). What this means is that searches can be made blindingly fast. But even earlier versions of Outlook's search engine work adequately, albeit slowly, if you're searching in only one mail folder, as here.
3. Use a third-party, fully indexed search engine. If you are using Outlook 2003, which has a slower built-in search engine, add-in software tools are available that enable fast, fully indexed searches of your e-mail. Software like Windows Desktop Search, Google Desktop Search, and Xobni are all excellent and most are free. Or consider a high-end commercial product like X1. However, many organizations will not allow you to install third-party software on your issued corporate computer, so be sure to check with your technical staff.
4. If you are solidly set on using multiple topic-named folders, you can periodically file out of the Processed Mail folder into those folders, and

you can later search visually within those folders. Presumably you will know exactly which folder to go to when you need to.

5. Finally, if you know you need to file by topic, I hope you will consider using the Outlook Categories filing system I teach in Lesson 8 as an alternative to using multiple topic-named folders. Using this, you essentially “tag” mail items in the Processed Mail folder with topic-named categories. The categories system allows you to keep all your mail in one Processed Mail folder, thereby maintaining the visual date-based or sender-based searches described above. But it also allows you, when needed, to view all mail in virtual category groups that you can open and close, as if they were in a folder system. And you can store one e-mail item in multiple categories. To view this mail in category groups you merely click the Categories column heading. You will learn all this in Lesson 8. Other tagging options are presented there as well.

More on Topic-Based Filing

Two of the options above for finding mail rely on topic-based filing, that is, identifying a keyword to associate each mail item with, and either filing it in a folder with that name or tagging it in a bulk location. But remember that filing by topic is optional. And given the large ratio between the time consumed filing mail by topic and how often you probably search for mail, I think topic-based filing all your mail is of questionable value for most users. Given the power of e-mail search tools, especially the newer ones discussed above (and again later in this lesson), I think most people can get by with just dragging all their mail to one folder (the Processed Mail folder) and then using a search tool on it as needed. This saves a huge amount of time, time otherwise spent on topic-categorizing all the mail you get; some people spend an hour a day filing their mail, which just doesn't make sense. And in case you need help using these search tools, I'll show you how to use a few of them at the end of this lesson.

But some people or organizations need topic-based filing. And there are ways to speed up topic-based filing and make it more practical, at least for some of your mail. You can use Outlook rules to automatically tag e-mail with categories based on, for example, sender, subject, or body text keywords. And add-in software can do more intelligent tagging and filing, allowing you to auto-file entire “conversations,” for example. All of that I describe in Lesson 8.

And if perhaps you like to store only a small portion of your mail by topic, by all means do that filing either before or after you store the rest of the mail in the Processed Mail folder. That can be a good compromise for those of you who have just a few key topics that need special attention. Again, that too is discussed in Lesson 8.

Emptying the Inbox—Step 1: Creating the Processed Mail Folder

But we are jumping ahead of ourselves. The purpose of this early lesson is to teach the simple art of emptying the Inbox every day. I really want you to experience that simple pleasure before you worry too much about how you are going to use topics, if at all.

The first step in emptying your Inbox is deciding where to create the Processed Mail folder. For now I suggest you make it a subfolder of your Inbox so it looks like this:



Here are the steps:

Windows Outlook

1. Go to the Navigation Pane and click the Mail banner button or icon.
2. Right-click the Inbox.
3. Choose New Folder from the shortcut menu.
4. In the dialog box that opens type “Processed Mail” as the folder name. Leave all other settings as is, and click OK.

Outlook for Mac 2011

1. Go to the Navigation Pane and click the Mail banner button or icon.
2. If you have a small arrow to the left of your Inbox, toggle it so you can see account names or locations below. Find your main account (it’s probably the top one) and use it in the next step. If no account names are below the Inbox, then focus on the Inbox itself in the next step.
3. CTRL-click the item in step 2.
4. Choose New Folder from the shortcut menu.
5. A folder is created with the name Untitled selected; replace that with the name “Processed Mail” and press ENTER or RETURN.

Note: Windows and Mac, if you have many other Inbox subfolders, consider placing an underscore in front of the P, to drive it to the top of the list: “_Processed Mail.” Or use some other symbol.

The above is a quick way to get started on using the Processed Mail folder. For advanced users or those with more time, I invite you to read a full discussion of Outlook folders in Appendix A. There you will find complete coverage of strategies for the best place to put your Processed Mail folder, ones that include getting mail off the Exchange system to beat any space issues you might have there. But try this quick solution for now and start emptying your Inbox into the Processed Mail folder per the points below. I think you will

like it. You can always study Appendix A later. And if you currently have Exchange space issues, see the Note after step 6 in the next section; that may work for now.

Next, you need to copy mail into this new folder. Here's how.

Step 2: Filing into the New Processed Mail Folder

The workflow for sending mail to the Processed Mail folder follows.

As you read mail in your Inbox:

1. If the mail is obviously junk, delete it. If not, just save it; your time is too valuable.
2. If the mail has an action (or appointment) associated with it, copy it to a task (or appointment). You saw a quick way to do that at the end of Lesson 2. I cover it more fully in Lesson 7. If the action is quick (under a minute), like a quick reply, just do it now instead.
3. Repeat the above every time you read new mail, until the end of the day.

Then, at the end of the day:

4. Optional: if you are using Outlook Categories (Lesson 8), apply categories to mail in the Inbox.
5. All users, take one more scan through your e-mail titles to make sure you did not miss anything important.
6. Drag all mail to the Processed Mail folder.

That's it, your mail is filed, and your Inbox is empty! Do this every day. I do it several times a day.

Note: Since for this introduction you created the Processed Mail folder as a subfolder of the Inbox, here's an important point: if your Exchange mailbox has size limits you will periodically need to drag mail from the bottom of the date-sorted Processed Mail folder to some off-server location; perhaps create a folder there called Older Processed Mail to drag into. Do this just as you are doing now for your Inbox. Or read Appendix A to explore more complete alternatives.

Start Storing Mail in the Processed Mail Folder Now

I cannot emphasize enough how important and powerful emptying your Inbox every day is. Get started on this today. If after doing that you are eager to include a topic filing system, feel free to skip ahead to Lesson 8 now to learn how to use Outlook Categories as your topic-based filing system within the Processed Mail folder. You can also read about other approaches there. Then come back and study the rest of this lesson.

If instead you want to save time and use a search tool approach within the Processed Mail folder (my current favorite method), read on; I explain those below. Or if you already know how to use the search tools built into Outlook and are happy with them, you can skip the remainder of this lesson and move on to the next.

Assuming you do want to use this single-folder filing system (with or without categories), how do you transition from what you are doing now?

Transitioning

From a Multiple-Folder-Based Filing System

If you are already using a multiple-folder-based filing system for e-mail, you may wonder what my recommendations are for transitioning to a single folder-based system. My primary recommendation is this: start fresh. There is no reason you cannot add a Processed Mail folder to your existing multiple-folder system and start using it with mail that is currently in your Inbox. Then retain your current system for the old mail you have already filed.

I realize this splits your stored mail for a while, but note the useful life of most old mail passes fast; in no time the only old mail that you'll be looking at will be the mail filed in the Processed Mail folder, and your old multifolder-based filing will be a rarely touched system. At some point you will feel confident to archive that system and refer only to your Processed Mail folder.

From No Filing System

If you do not have a filing system, chances are good that your Inbox is quite overcrowded with months of old mail. How do you get started? Do you need to commit to extracting tasks from all of your months of old mail before dragging it to the Processed Mail folder? My answer is no.

Again, what I recommend is to take a fresh start. In this case, I recommend picking a date one week ago and dragging all mail older than that to the Processed Mail folder immediately. Mail newer than that you should commit to processing into your Processed Mail folder immediately, extracting tasks as you do so. Now you have an empty Inbox! Make a note of that processing cutoff date.

Then, as time allows in the days ahead, dip into the older mail in the Processed Mail folder and extract more tasks, doing at least one full day at a time, and note the date on which you stop again each day, so you can start below that the next time you come back to this task.

But doing this additional processing is purely optional; it is likely that embedded tasks older than a few weeks have diminished in importance anyway, or have been communicated again.

These steps enable what is most important: that you empty your Inbox quickly, start extracting tasks, and start experiencing the benefits of an empty Inbox. Then keep emptying the Inbox every day.

One last point. If you are going to process much of your older mail, you might want to skip ahead and study Lesson 7 completely before spending too much time. There you will find thorough coverage of all the various ways to convert action e-mails to tasks. Also, study the end of that lesson for more transitioning suggestions. But first, read on below to see how to *search* your newly filed mail.

Using Search Tools with the Processed Mail Folder

I discussed above the five ways to find mail once you store it in bulk in the Processed Mail folder. For most of us, using a search tool will be all you need to know. The tool built into Outlook 2007/10 and 2011 is nearly perfect. So in the rest of this lesson, I am going to describe how to use Outlook's built-in search tools: Instant Search (Outlook 2007/10) and Spotlight (Outlook for Mac 2011). If you already have a search tool in use, and are happy with it, you can skip the rest of this lesson.

I am also going to cover Find for Outlook 2003. But if you are using Outlook 2003, I hope you can and will add a third-party indexed search tool like I mentioned earlier. Here is a list of popular ones for your reference; sources for each are listed in Appendix C:

Third-Party Tools for Outlook 2003 Search

- ▶ X1 (paid)
- ▶ Windows Search (free)
- ▶ Google Desktop (free)
- ▶ Xobni (free and paid version)

Still, if due to company policy you cannot install such software, using the Find search tool built into Outlook 2003 may do the job for you.

Using the Outlook 2007/10 Instant Search Tool

Let's start with my favorite, the Outlook 2007/10 Instant Search tool. Mac and Outlook 2003 users, note this section on Outlook 2007/10 is long, so skim ahead until you find the write up for your version.

History of Windows Outlook 2007/10 Instant Search

A little history on this tool is in order. Microsoft introduced Instant Search as a totally new Outlook search engine in Outlook 2007. Actually, it was not completely new since it was based on the same search engine used in Windows Desktop Search, which came out well before Outlook 2007. Windows

Desktop Search was an optional add-in to the older PC operating system Windows XP. It is still available under the name Windows Search, and it enables searching all files and e-mail on your Windows XP computer. Before Outlook 2007 and Vista came out, I used Windows Desktop Search regularly, and it worked relatively well, but I never really liked the user interface. In Outlook 2007 and 2010, however, Microsoft has integrated the e-mail portion of that search engine very effectively into Outlook. Microsoft also integrated the file search portion of Windows Desktop Search into Vista and Windows 7. In fact, these days it's all one tool again; the indexing service engine built into later versions of Windows is used by Outlook for its searches. And in the midst of this evolution, Microsoft also improved the user interface considerably. You will now see search boxes throughout the latest versions of Windows and a search box inside the latest versions of Outlook, and they are really the same indexed search tool, just searching for different things. And with the unified interface they are now a pleasure to use.

Note: While Instant Search is included with every Outlook 2007/10 package, in some circumstances it must be activated. Look for the command [Click Here to Enable Instant Search](#) just below the Search box in Outlook. If it's not there, and you see no search box, check with your IT department. Also note that if you are using Windows XP and try to activate Instant Search in Outlook 2007/10, you may be directed to install Windows Desktop Search first, since it provides the core indexing engine in XP. Vista and Windows 7 users, make sure you have not turned off Indexing Service on your computer for some reason; that will disable Outlook Instant Search.

How to Use Windows Outlook 2007/10 Instant Search

In Outlook 2007, the tool sits inconspicuously to the right of the folder name at the top of the current folder contents; you might not even notice it is there. In Figure 5.1 it is the box with the words Search Inbox inside.

In Outlook 2010, Instant Search sits above the current folder contents, and depending on how wide your Outlook window is, it can occupy the full width of that space (see Figure 5.2).

Like all good modern search engines, the tool works by first indexing your mail, which means it builds invisible tables of the locations of every word in every e-mail; that's why searches are so fast. Building this table ahead of time takes time, so when you first install the program it will spend hours working in the background doing this indexing. Mine took almost a day to complete, since I save so much old mail. Don't worry, this will not slow your computer significantly, and it automatically stops when you start using the computer. After it is complete, as you add more mail, it indexes only the new mail as it comes in, almost instantly. However, if you rearrange all your folders one day, it will take quite a while to re-index everything in their new locations.

Figure 5.1
Outlook 2007
Instant Search
box.

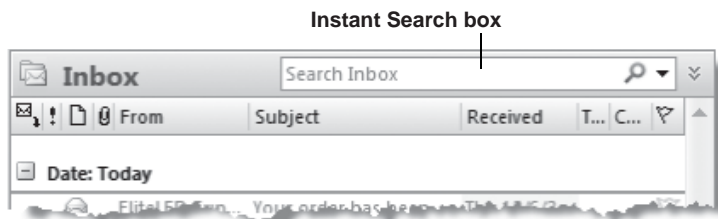
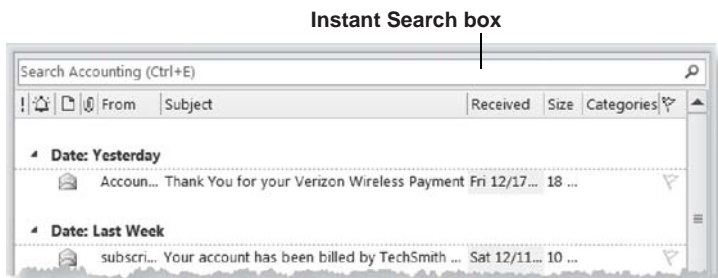


Figure 5.2
Outlook 2010
Instant Search
box.



Using Instant Search for Basic Searches in Windows Outlook 2007/10

Once you click inside the search box, the entire folder header lights up in orange, indicating the search tool is ready for you to use. And in Outlook 2010, the Search Ribbon tab becomes visible. Type your search term in the box, and depending on the settings (discussed below), the results either show up immediately when you pause typing, or when you click the magnifying glass icon at the right end of the search field. The results *replace* the mail previously displayed in the folder. To clear the results and see all your mail again, click the Close button (x) that replaces the magnifying glass after a search; the orange coloring goes away to confirm that you are back to your full folder contents again.

Changing the Index Settings

If you have lots of old mail in many different Personal Folders groups, one thing you may want to do is expand or restrict the personal folders being indexed. Restricting it can save time during the initial installation, which can help you get started on searching more quickly that day. And it reduces subsequent indexing efforts if you move folders around.

To do that in Outlook 2007, first click the drop-down arrow at the right edge of the search box, and the menu shown in Figure 5.3 appears. This is the main Instant Search menu. From that menu choose Search Options... and a dialog box called Search Options opens. At the top of that dialog box (in the section called Indexing) you can control which data files are indexed. This will list your Exchange mailbox if you have one, and then any personal folders file

groups you might have. It may even include SharePoint servers if your organization has those. Select or clear the check boxes to suit your search needs, keeping them to the smallest set you may need.

In Outlook 2010 it's more complicated. First, click once in the Instant Search box to activate the Search tab in the Ribbon, and then click the Search Tools drop-down menu at the right end of the tab as shown in Figure 5.4. From that menu select Search Options... and in the window that opens click the Indexing Options button. This opens an Indexing Options dialog box that applies to all of Windows. Select Microsoft Outlook in the list and then click the Modify button near the bottom of the window. In the next window toggle the arrow to the left of Microsoft Outlook, and then add or remove check marks next to the file stores you want to index. Click OK all the way out when done.

Note: After you confirm which check boxes are selected and click OK, Outlook may ask you to restart Outlook before continuing.

The Outlook 2007/10 Search Options control described above is also where you can turn on and off the “search while typing” feature (look for the check box with that phrase). Experiment selecting or clearing that check box to see whether you like it. I find that given all my old mail, if I include too many data stores in my scope of search (described below) I don't like having the search-while-typing feature on—it makes the search a bit “jumpy.”

Figure 5.3
Outlook 2007
Instant Search
main menu and
Search Options.

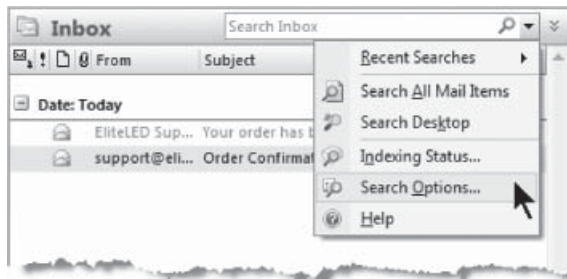
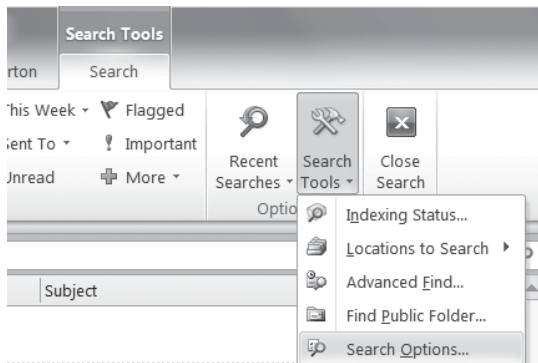


Figure 5.4
Outlook 2010
Search Tools
menu and Search
Options.



Particularly when using More fields in 2010 (discussed ahead). But with simple, one-folder-at-a-time searches, it is usually fine.

Controlling Scope of Search

Selecting a wide *index* scope as described above does not mean that all files are automatically searched at once when you actually do a search. By default, Instant Search only searches the currently open folder. This default is perfect for our MYN Processed Mail folder system, where all mail is stored in one folder.

If you do not find what you are looking for and want to search beyond the current folder, once the search is complete, Instant Search gives you an option to expand the search to more items (you'll see the phrase Try Searching Again in All Mail Items – click it to expand the search).

Instead of indicating which folders to search, another way to control the scope is to indicate which data stores and data types you want to search selectively. Here's how.

Controlling Scope of Search in Outlook 2007

In Outlook 2007 you control which data stores and types are searched using a control installed near the top of the Navigation Pane. It is separate from the main search box, so you may not notice it. Figure 5.5 is how it looks when Mail is the active data type in the Navigation Pane; note the All Mail Items banner in the middle of that figure.

That may look like a label, but it is actually an Instant Search control. Also note the magnifying glass icon to its left; that's how you know this control is associated with Instant Search. The label of this control changes when you change which data type is active in the Navigation Pane. If you want to search across all Outlook data types (Mail, Contacts, Calendar, and so on), click the Folder List button at the bottom of the Navigation Pane; doing so will change the mode of the Navigation Pane to show all Outlook data types. *Then* click that new control; it will now be labeled All Outlook Items. If you want to search on all contacts (only), click the Contacts banner button or icon first in the lower portion of the Navigation Pane to enter Contacts mode, and so on. For a discussion of the Navigation Pane and its various data type modes, see the second half of Appendix A.

This Instant Search scope control bar in the Navigation Pane also lights up in orange when you start using Instant Search. Note as soon as you click this control, whether you open it or not, you immediately expand the scope beyond the currently active folder, and your search speed will slow noticeably if you have lots of other mail. That also changes the title at the top of the search results window on the right (for example, to All Mail Items if the Navigation Pane is in Mail mode), reminding you of your search scope.

If you click the solid arrow at the control's right edge in the Navigation Pane, the list of data stores is exposed, and you can select or clear those you want included in the upcoming search (see Figure 5.6). If you do this *after* running a search, it will start the search again and update the search results in the search window.

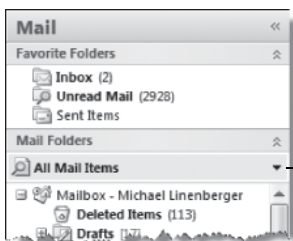
If you find this a bit complicated, I agree. In Outlook 2010 Microsoft simplified these controls greatly.

Controlling Scope of Search in Outlook 2010

In Outlook 2010 all the search scope controls are located in the Search tab in the Ribbon menu. For simple control, look at the left edge of the Search tab and find the Scope group (see Figure 5.7). The selection there defaults to Current Folder; but you can change it in individual searches by selecting the other choices: All Subfolders, All Mail Items, or All Outlook Items. The phrase All Mail Items changes depending on whether you are in a mail, tasks, contacts, or calendar folders. Selecting All Outlook Items searches across all those data types. This is a major improvement over the Outlook 2007 interface.

If you know you always want to search all folders within a given data type (and do not want to wait until after the first search attempt to expand your search), then open the Search Options dialog box (using the menu shown in

Figure 5.5
2007 Instant Search control on the Navigation Pane.



Search scope control

Figure 5.6
2007 search scope control.

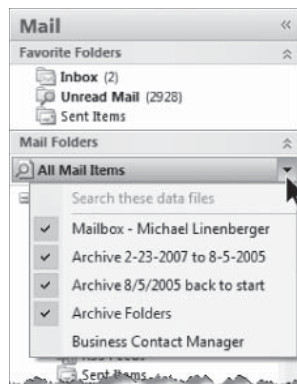


Figure 5.7
2010 Search tab

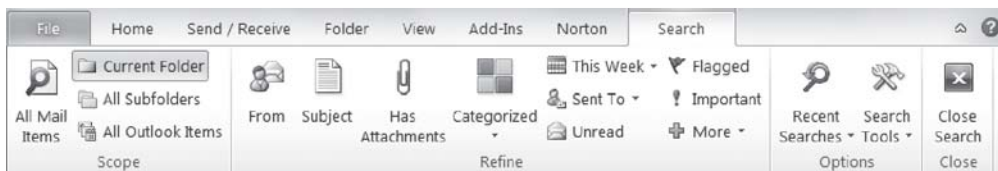


Figure 5.4) and change the Include Results Only From setting to All Folders. From now on all searches will start with a search of all folders.

To selectively change which data stores are searched do the following. From the Search tab click Search Tools, and then select Locations to Search... and then add or remove check marks against the various data files or accounts listed there. Those settings are permanent until you reset them later.

Next, I want to cover how to enhance the logic of the item terms you are searching on.

Narrowing Your Search

If all you do is type a word or phrase in the search box, you can get a pretty wide search with too many hits. If you want to narrow the logic of the search, you need to use additional controls.

In Outlook 2007 you narrow your search by opening the Query Builder; you reach it by clicking the down-pointing chevron at the right of the search box—that results in Figure 5.8. Here you can limit the search by entering additional search terms specific for various e-mail fields. For example, in the search in Figure 5.8, I want to find all mail with “Intermedia Exchange” anywhere in the message, and I want the word “Intermedia” to be in the Subject field. The default field list you see may be different from that in Figure 5.8; you control that either by using the Add Criteria button at the bottom, or by changing the title of any existing field using the drop-down arrow next to each. I recommend you play around with this query tool and teach yourself how to search on various field combinations; it’s fairly intuitive.

In Outlook 2010 you can narrow your search by using the commands in the Refine group on the Search tab (see Figure 5.7). There you can limit the search to certain senders, subjects, date ranges, and so on, but you need to edit the values in the search box and that can be confusing. I prefer using the older Outlook 2007 interface that gives you a separate box for each search criterion (as in Figure 5.8); you can get to that in Outlook 2010 by clicking the More button at the lower right of the Refine group on the Search tab. Click that More button as many times as needed to add fields to narrow the search. If you use More fields a lot in Outlook 2010, I recommend turning off the “search while typing” that was discussed above, as that feature can lead to frustrating behavior when entering field values (if you pause too long, the cursor jumps out of the box you are entering).

Note: If you preferred the Advanced Find interface of Outlook 2003 for this type of query creation, it is still available for use with the indexed search engine in 2007/10. To access the old interface in Outlook 2007, on the Tools menu choose Instant Search and then Advanced Find.... In Outlook 2010, on the Search tab of the Ribbon choose Search Tools and then Advanced Find.... Note, however, that using this interface you can only search one data store at a time.

Figure 5.8
Instant Search Query
Builder.

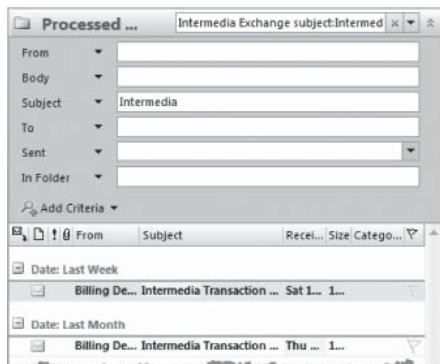


Figure 5.9
Query syntax, sample
documentation.

Type this	To find this
bobby	Items containing <i>bobby</i> , <i>BOBBY</i> , <i>BoBby</i> , or any other combination of uppercase and lowercase letters. Instant Search is not case sensitive.
bobby moore	Items containing both <i>bobby</i> and <i>moore</i> , but not necessarily in that order.
bobby AND moore	Items containing both <i>bobby</i> and <i>moore</i> , but not necessarily in that order. Note that logical operators such as AND, NOT, and OR must be in uppercase letters.
bobby NOT moore	Items containing <i>bobby</i> , but not <i>moore</i> .
bobby OR moore	Items containing <i>bobby</i> , <i>moore</i> , or both.
"bobby moore"	Items containing the exact phrase <i>bobby moore</i> . Note the use of double quotes so that the search results match the exact phrase within the quotes.
from:"bobby moore"	Items sent from <i>bobby moore</i> . Note the use of double quotes so that the search results match the exact phrase within the quotes.

In Outlook 2007/10, narrowing the search as described above (using Query builder in 2007, or the More fields in 2010) actually edits the search phrase itself in the search box. You'll see a phrase like "iPad received:this week" where iPad is the search term, Received refers to the date field, and This Week is the date value. What you are doing is building a text-based query; the various fields and controls you click are just helping you do that. You can then edit that query directly. In fact, you could build that full query manually, just by typing the query directly in the search box, using the Instant Search query syntax. I cover that next.

Outlook 2007/2010 Instant Search Query Syntax

In case you are an experienced search-tool maven and are starting to think the interface described above seems a little lightweight, know that you can

make your searches as elaborate as you want by using a very sophisticated query syntax. Rest assured you can, if you study, find a way to find almost anything. You will want to study Microsoft’s documentation on search syntax to understand all the possibilities. Figure 5.9 shows the first seven commands in one of the query syntax documentation sets; the full list of commands stretches to nearly five pages in length, so there is a lot of power here if you want it. To find this documentation, open a Google Internet search and enter “query searches in Outlook”; find the article titled “Learn to narrow your search criteria for better searches in Outlook.” Other documentation exists as well.

Using Search in Outlook for Mac 2011

The indexed search capability in Outlook for Mac 2011 is based on Spotlight – the search tool used throughout the Macintosh. Compared to Outlook 2007/10, the user interface is much simpler in Outlook for Mac 2011, but just as powerful.

To start a search in Outlook for Mac 2011, click the Search This Folder box shown at the top right of Figure 5.10. Once you stop typing, the results are

Figure 5.10

Outlook 2011 Search tab is activated after clicking in the search box.

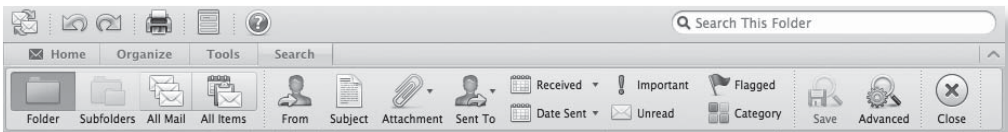


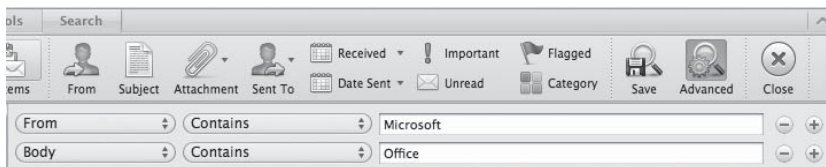
Figure 5.11

Narrow your 2011 search by choosing a column name just after typing.



Figure 5.12

Outlook for Mac 2011 Advanced Search.



displayed in place of the current folder contents. Then, by clicking a choice in the popup shown in Figure 5.11, which automatically appears after you type the search term, you can narrow that search to a particular Outlook column name; or ignore the popup.

You can get more control over those column name searches if you click the buttons in the middle of the Search tab (see From, Subject, Sent To, and so on, in Figure 5.12). Each time you click one, you add a line to the Advanced Search panel just below the Ribbon as shown in Figure 5.12. You can also add or remove lines in that section by clicking the minus and plus signs at the right end of each search line. And you can change the search logic by changing the values in the popup column names and search verbs; the latter usually defaults to Contains. You can show and hide that entire Advanced section by clicking the Advanced button at the right end of the Search tab in the Ribbon.

Controlling the scope of the search is possible as well. By that, I mean controlling what folders or Outlook data types are searched. You do that by using the four buttons at the far left of the Search tab. For example, if you choose All Mail, the search expands to multiple mail files or mail accounts (should you have those). If you choose All Items, Outlook searches through mail, tasks, contacts, calendar, and notes for your search term.

Like Outlook 2007/10, you can gain even more search control by typing complex search criteria directly into the Search box. Do a Google Internet search on “Spotlight Search Syntax” to find documentation on available commands.

Using Find in Outlook 2003

The search tool in Outlook 2003 is called Find, and it has gained a bit of a bad reputation. That’s primarily because it can search only one data store at a time and because it is slow. I know in the past I avoided using this tool due to its slow speed. But if you cannot use an add-in indexed search engine, take another look at it; it’s better than spending hours filing your mail.

How slow is it? Here is a worst-case example. Searching three years’ worth of my saved mail (14,000 items in one Processed Mail folder) on the word “Outlook” (I get a lot of mail with that word in it), it took about two minutes to search titles only; three minutes when I included all text in all messages. Two to three minutes is a long time to wait, but again, this is a worst-case example.

It can be much faster. In a typical corporate environment where the Exchange mailbox is limited in size, if you search only your Processed Mail folder there, your searches will be much faster. And even with large folders, in Outlook 2003 I found that once I did any search, if I searched again during the same Outlook session, the subsequent searches were dramatically quicker, even for different words. For example, my second search of the same 14,000 items, full text of messages, on the word “Microsoft” took only 13 seconds (and the same if I searched on the word “Outlook”); this is pretty reasonable, and no doubt

faster for smaller collections. I suspect a temporary index of some sort is built during the first search and reused on subsequent searches.

As to the data-store scope limit, again, if you limit your searches to the Processed Mail folder, you should be fine.

So give this tool a second try if you have given up on it in the past due to speed or scope limits; you may find it quite usable once you start using a single folder filing system and get past the first search of the day. And compared to hunting through long lists of mail, or spending hours per week filing mail by topic, it has got to be better.

There are two modes of this search tool, Simple Find and Advanced Find; people who use this nearly always use Simple Find.

Simple Find (Outlook 2003)

Simple Find is activated by clicking the Find button on the main Outlook 2003 toolbar, or by selecting Find from the Tools menu. This places a toolbar-like row of commands and fields at the top of the currently open folder (see Figure 5.13).

Using that toolbar, just type your search term into the Look For box at the left and click Find Now in the middle, and the results replace the mail in the folder below. Watch the small document and magnifying glass icon at the left end of the toolbar (not shown in Figure 5.13). If it is moving and circling, the search is still in progress; when it disappears the search is complete.

By default Simple Find looks in the currently selected folder. You can expand that by first clicking the drop-down arrow next to Search In. There you can select All Mail folders. Better though, given speed issues, is to click the Choose Folders item and carefully select only those folders you need to search from the Select Folder(s) dialog box, shown in Figure 5.14. Note that subfolders are not automatically included when you select parent folders in this dialog box.

After the search is done, to clear the search results, click the Clear button on the Find toolbar; or click the Close button (x) at the right side of the Find toolbar, which also closes the Find toolbar.

Advanced Find (Outlook 2003)

Advanced Find is activated by clicking the Options drop-down on the Find toolbar, and selecting Advanced Find; or from the Tools menu, click Find, and then Advanced Find. That opens the dialog box in Figure 5.15.

You can see you have much more flexibility in building search criteria here, but understanding this dialog box can be a bit daunting, especially under the Advanced tab.

Advanced Find also looks in the currently selected folder by default. To expand that scope click the Browse... button, and the same Select Folder(s)

Figure 5.13
Outlook 2003 Simple Find.

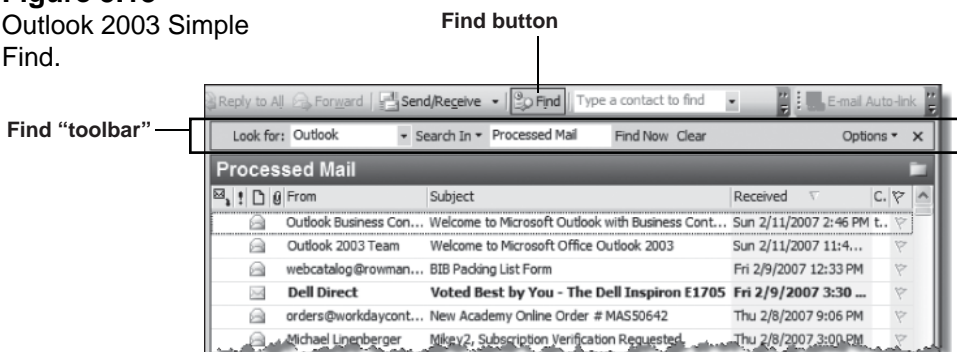


Figure 5.14
Select Folder(s) dialog box in Simple Find.

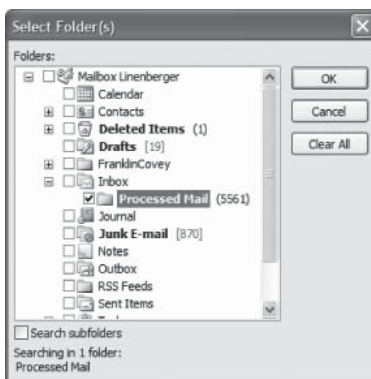
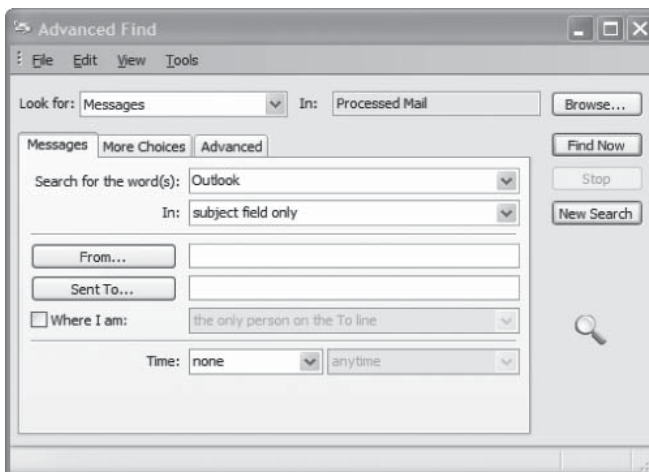


Figure 5.15
Advanced Find.



dialog box used in Simple Find opens, from which you can include more folders to search.

That's all I am going to say about Find. For more features and functions information about Find, I recommend studying any of the excellent Outlook reference books available, listed in Appendix C.

Summary

- ▶ Emptying your Inbox every day is an important way to increase workday control because it clears unattended responsibilities that may otherwise haunt you. It removes clutter from an important area of daily focus. It signals you are ready to move on to new work.
- ▶ The easiest way to empty the Inbox is to first extract tasks and then drag everything to one folder (called the Processed Mail folder), which for now I recommend you create as a subfolder of the Inbox.
- ▶ If you'd like to get started quickly, drag all mail older than a week from the Inbox to this folder now. Then immediately process the mail left in the Inbox into the Processed Mail folder as well, extracting tasks as you go. Make a note of the cutoff date, and when you have time later, extract tasks from mail older than that date. If you are in an Exchange Server environment with tight mailbox size restrictions, you will now be emptying your older mail from your Processed Mail folder as you reach your limits.
- ▶ Consider studying Appendix A for other Processed Mail folder location suggestions (such as using a local folders file).
- ▶ Try using Outlook's built-in search functionality as your way to find older mail in the Processed Mail folder. If you are using Outlook 2003, the one version covered in this book that does not have a fast indexed search engine, install one of the powerful add-in indexed search engines if your IT department will permit that. Many such search tools are available but I recommend X1. If you cannot do that, then give the Outlook Find tool a try; it can work better with a one-folder search.

Next Steps

Congratulations on finishing Part I! You are now using all components of the system in a basic way. You can stop here if you like, and start to enjoy the fruits of your labor. This book was designed so you can do just that: get a relatively speedy start, and then take a break from study if desired.

But better is, if you have time, to plunge ahead into Part II. You have more to learn. For example, if you intend to empty a relatively full Inbox now and

extract tasks, you may want to skip ahead and take Lesson 7, which is the full lesson on converting e-mails to tasks. That way your task creation will be most productive. And if you are eager to apply topic-based filing to the mail stored in your Processed Mail folder, feel free to jump ahead and take Lesson 8 now as well. In both cases come back to Lesson 6 to complete your core training. Lesson 6 will help you understand task management even more.