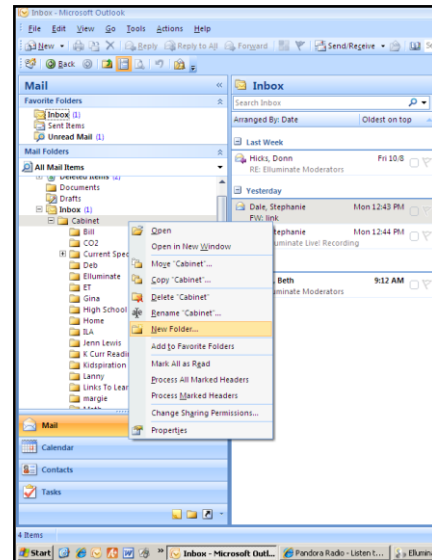
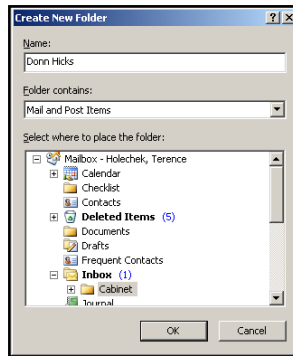
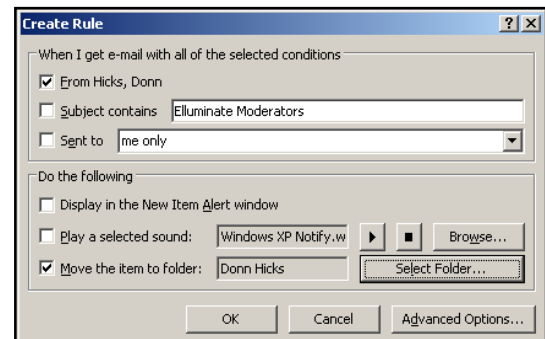
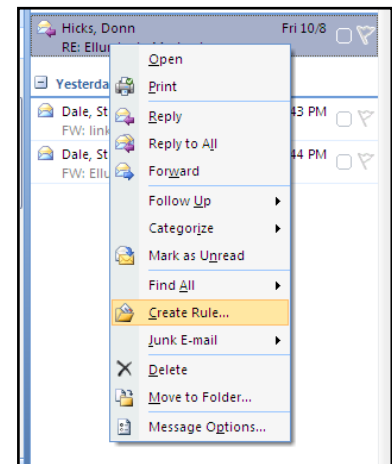


Creating Rules for Folders in the Cabinet

1. Create a new folder in the cabinet to receive the mail messages.
2. Right mouse click on the cabinet folder in the Navigation Pane.
3. Drag to select New Folder and a new window will appear.
4. Type in the needed name for this folder. The cabinet is in alphabetical order.
5. Click OK and then verify that you folder is in the correct location.

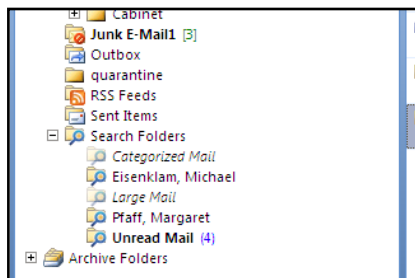
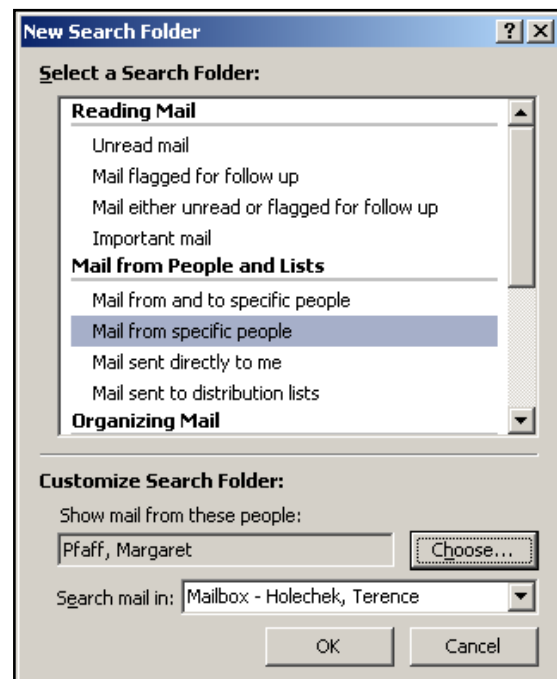
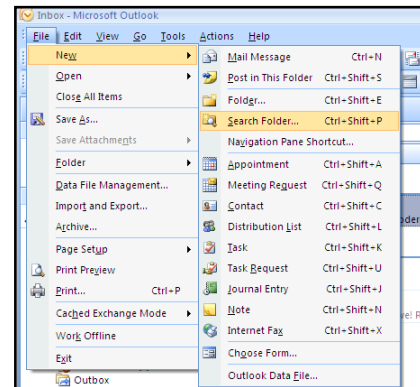


6. Now the rule needs to be set for the target mail to be sent to this folder. For this example I have created a folder to hold all email from Donn Hicks.
7. The next time I get an email from Donn I need to use that to set the rule. Right mouse click on that email and drag to select Create Rule.
8. In the create rule window check the box from Donn Hicks in the Selected Conditions section.
9. In the Do the Following section check the Move the Item to folder and click on the Select Folder button to navigate to the correct folder location. In this example the folder name is Donn Hicks.
10. Click OK and you can apply this to that email now and it will send it to the correct folder
11. Now each time mail comes to my Inbox from Donn it will go to his folder and will remain there for 90 days.



Using Search Folders

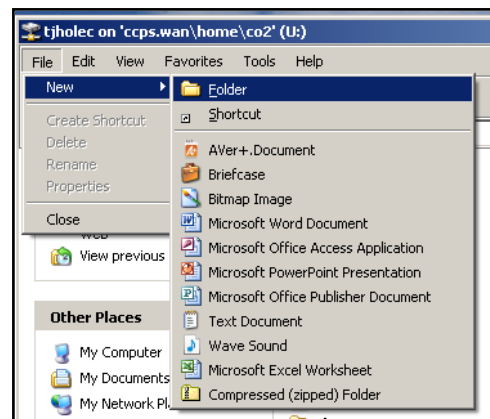
1. Go to File and drag to New and then select Search Folder.
2. Select one of the predefined search folders.
3. In this example I have selected the predefined search folder for mail from specific people.
4. Click on the Choose button and select the person from the Global Address book. MP is my sample.
5. Click OK.
6. Look in the Navigation Pane and at the bottom of the list you will find Search Folders.
7. Click the plus sign to expand the folder and you will find the search folder you have created.
8. This will contain email sent from that person as well as email you have sent them.
9. This folder will remain there until you delete it from the list.
10. To do that right mouse click and drag to select Delete.



Creating and Using Folders on the U Drive

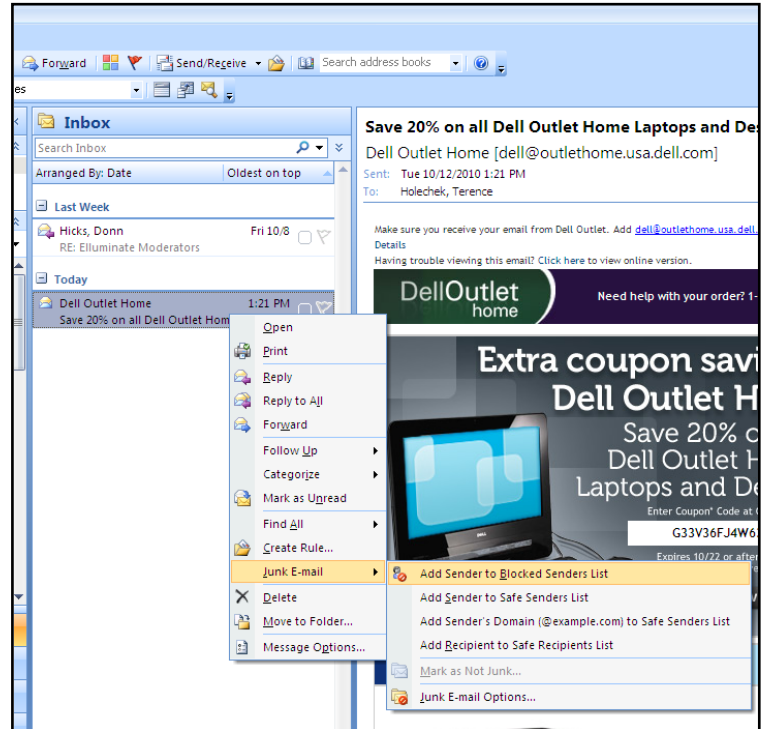
Dealing with attachments on email messages...

1. Open your U drive on the network via My Computer.
2. To create a new folder go to File and drag to New and select Folder.
3. A new untitled folder will appear on the U drive, type in its name and then click off in the white.
4. Use this folder to hold important Word, PDF, Excel documents indefinitely.



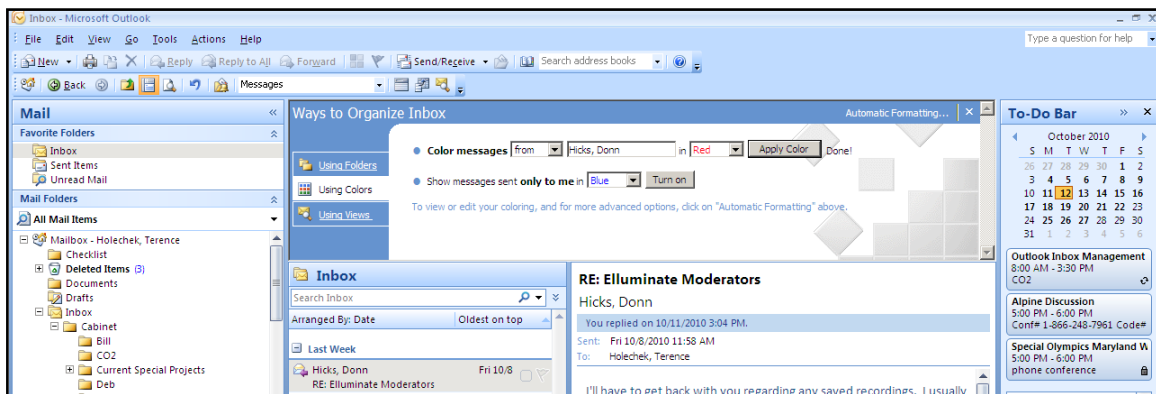
Junk Mail & Blocking Senders

1. Right mouse click on the offending email.
2. Drag to select Junk Email there you will find five possibilities..
 - a. Add Sender to Blocked Senders list
 - b. Add Sender to Safe Senders List
 - c. Add Sender's Domain
 - d. Add Recipient to Safe Senders List
 - e. Junk Email Option
3. Make the correct selection knowing that it can be undone if needed.
4. To Undo click on the Junk Email Option and a window will open allowing you access to the Safe Senders and Blocked Senders list to make the needed changes.



Coloring Incoming Email Messages

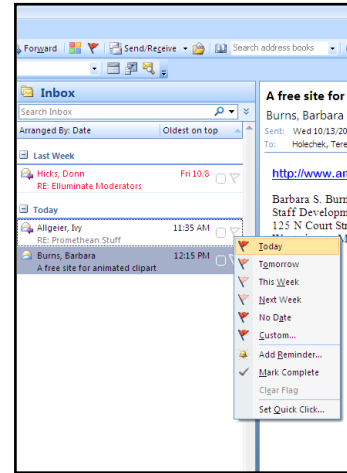
1. Click on the email from the sender you are wanted to color.
2. Go to Tools and drag to select Organize.
3. Select Using Colors.



4. Pick the color needed for the sender and click Apply.
5. It will indicate you are done and all emails from that sender will now be that color.

Flagging Messages

1. Flagging a message will allow you create to do items that appear in the To Do Pane. Right Mouse click on the blank flag at the end of the message and a drop down menu will appear.
2. You can select when the due date for the task is by selecting the appropriate flag.
3. Select Custom to get a calendar to be more specific.
4. Once it is selected the flag at the end of the message will be colored and it will be added to the tasks at the bottom of the To Do Pane.
5. The flag color reflects when it is due.

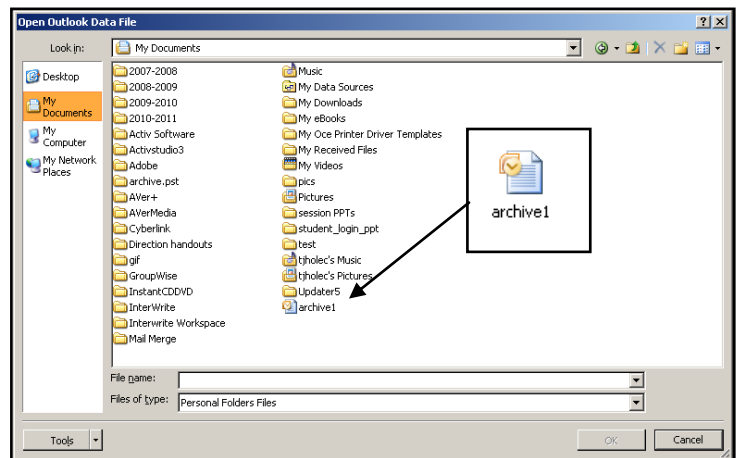


Archiving Beyond the 90 Day Rule

**** Archive only what you need.

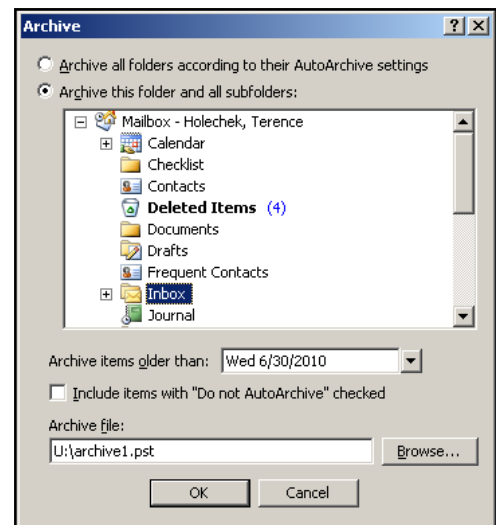
GroupWise

1. If you archived in GroupWise it is best that you connect to that archive because it should be currently housed on your U drive.
2. Go up to File and drag to select Open.
3. Drag to Outlook Data File.
4. The window to the right appears; click the My Document button on the left.
5. Find the Outlook icon that has your username and double click there.
6. This will then place your archive in the Navigation Pane on the left side near the bottom.
7. NOTE: It will be labeled GroupWise Archive, but it will work in Outlook as well.



Setting Up an Archive in Outlook

1. Go up to File and drag to select Archive and this window will open.
2. Select the second radio button and Inbox should be selected
3. In Archive File we need to set the location to the U drive. Click Browse.
4. Click My Documents and you should see your U drive.
5. It defaults to **archive1**, but you may rename it here using your username so it can be easily located.
6. Click OK and it will then place your archive in the Navigation Pane on the left side near the bottom.

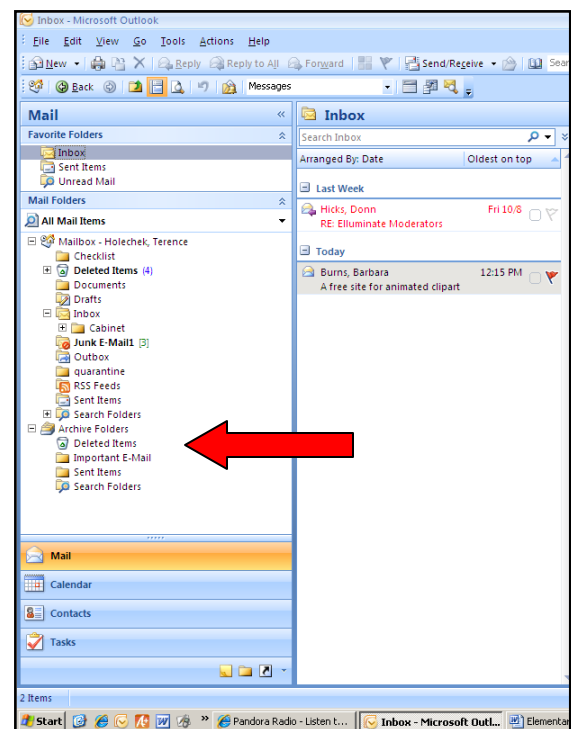


Using Your Archive

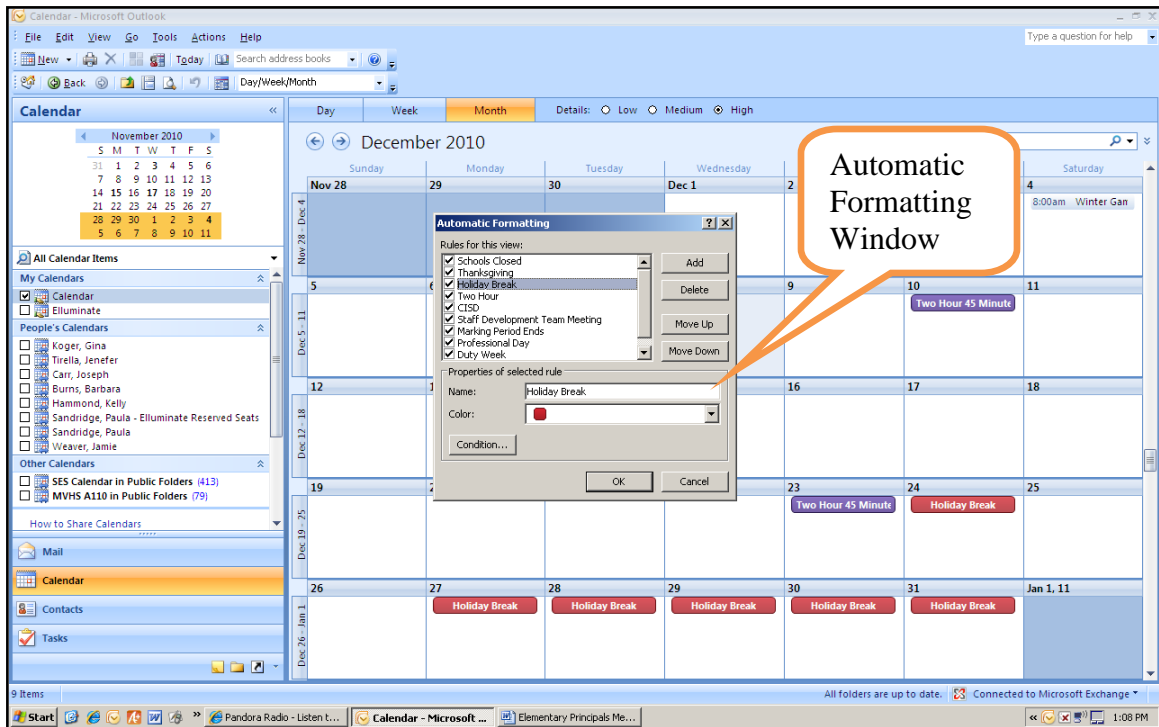
1. Make sure to turn off auto archive. To do this go to Tools>Options>Other Tab>Auto Archive button> Remove the first check in run auto archive> Click OK twice. This will allow you to manually archive only what you need.

Archive Items Manually

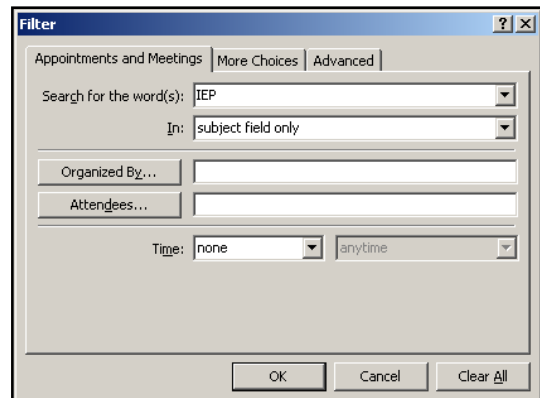
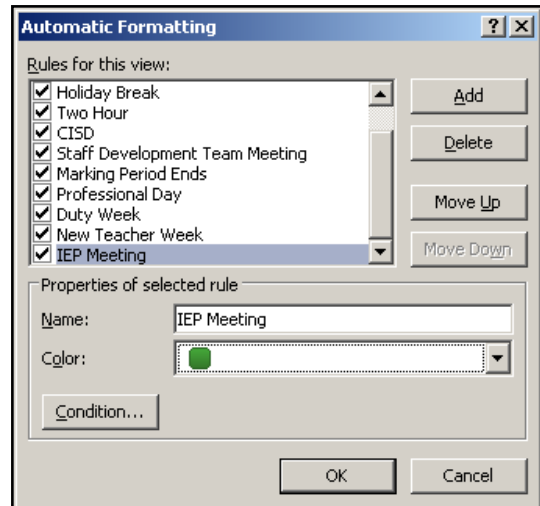
2. Click on the + sign in front of the archive and it will open showing the folders contained within.
3. If you need additional folders right mouse click on the main archive folder and drag to select New Folder and name it accordingly.
4. To use the archive manually simply click and drag the message into the archive and release and it will be taken from its original location and placed into that archive folder.
5. It is now on your U drive and not subject to the 90 day rule of deletion.
6. You need to maintain this like you do with your inbox meaning delete any old and unwanted emails. This does count towards your U drive space.



Automatic Formatting and the Calendar



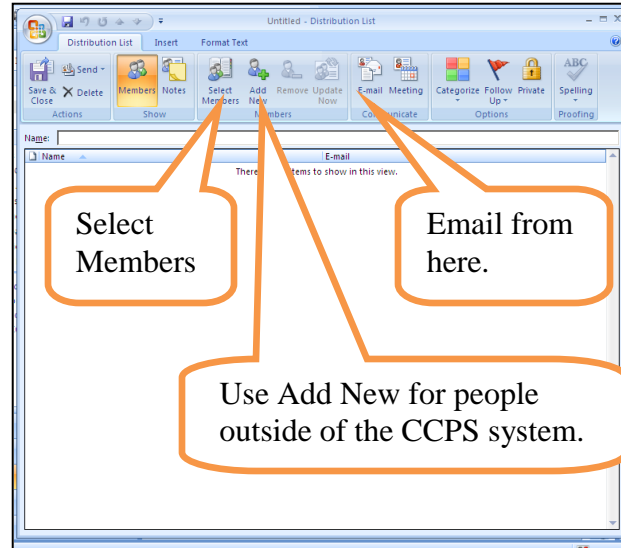
1. You can use color to keep your calendar easy to read.
2. In this example all holidays are colored red and this is done automatically by setting up the rule. You do not need to touch every appointment.
3. Go to Edit and drag to select Auto Formatting and that window will appear.
4. Click on Add on the right and a new untitled will appear in the Name line. Name it accordingly and in this sample I have typed IEP Meeting and selected green as the color.
5. Click on the Condition button.
6. The Filter window now appears and in the Search for the words field type those words you will filter or sort for... in this sample I have typed IEP.
7. Click OK twice and the rule is set, now when you get an appointment with IEP in the subject line it will be green on your calendar.



Creating Distribution Lists

In GroupWise they were simply called Groups, in Outlook they are called Distribution Lists.

1. Click on the Navigation Button called Contacts.
2. Go to File drag to New and then to Distribution List, the window to the right will appear.
3. In the Name field type the name of the list.
4. Click on Select Members and the Global Address List opens.
5. Search for the people you want to include. Double click on their name and do this for each person needed.
6. Click OK. The name and email addresses will appear in the window.
7. Finished? Click on Save and Close.

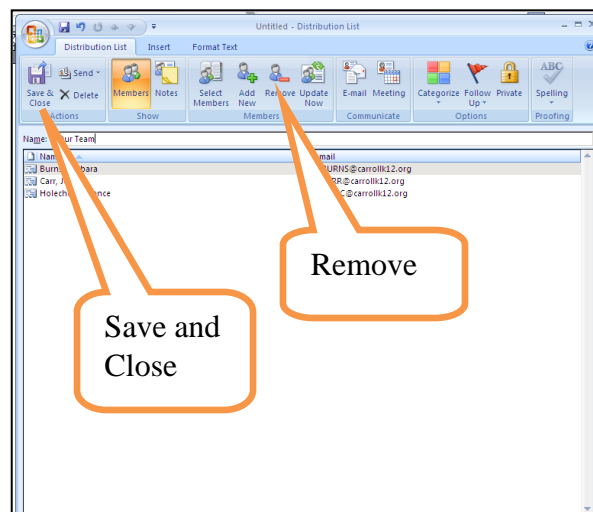


**** Remember you need to train your Outlook account to recognize this new distribution list. You need to send one email for this to happen. There is an email button on the window above to do just that.

Editing an Existing Distribution List

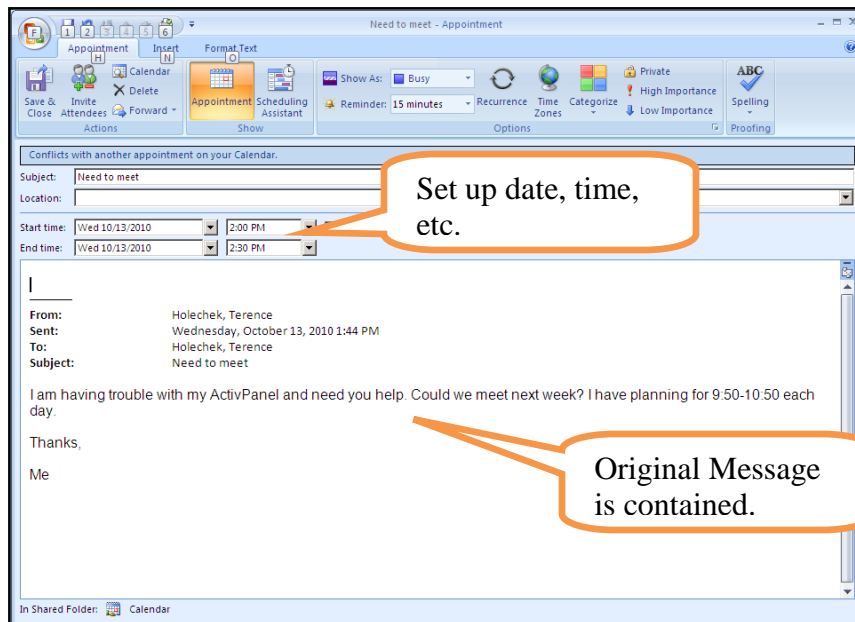
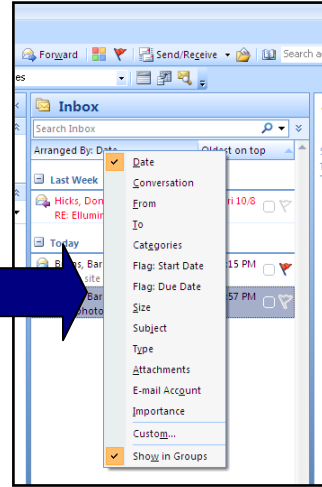
**** **Never click on the Delete X unless you want to get rid of the entire distribution list.**

1. To remove a name from the list click on the name once to highlight it and then go to Remove and click.
2. To add new click on Select Members and search as stated in the above section.
3. Save and Close once you are done.



Helpful Hints Page...

1. To help keep my Inbox organized I have created many folders in the cabinet in the Navigation Pane. I know they will be gone in 90 days, but once I am done with an email I click and drag into the appropriate folder to get it out of my Inbox. If I need to look back to that email I have 90 days to do so, but keeping my Inbox to a minimal number of emails helps keep me organized and above water.
2. Use the Arrange by filter in the Inbox to help find things quickly. It defaults to date and you can change it to oldest/newest on top, or search in many other ways. Click on the Arrange By bar at the top of the Inbox the get the drop down menu.
3. Did you know that you can click and drag a mail message to your calendar? If I have an email that needs to be an appointment I simply click and drag that message to the calendar button on the lower left and let go. The original message is still in the Inbox but an appointment window will open with the message contained. Easy to do and very helpful.



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Staff Development
Carroll County Public Schools
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