CHAPTER 2   ORGANISING MESSAGES

INFOCUS

Outlook provides a number of tools and features for organising your email messages. For example, you can delete messages and move and copy messages to your own custom mail folders. You can also use the new quick styles to perform multiple step functions on your messages with a single click, plus more.

In this session you will:

- ✓ learn how to create a mail folder
- ✓ learn how to move messages into other mail folders
- ✓ learn how to copy messages between folders
- ✓ learn how to delete messages
- ✓ learn how to recover messages from the *Deleted Items* folder
- ✓ learn how to clean up conversations
- ✓ learn how to work with the *Favourites* folder list
- ✓ learn how to delete message folders
- ✓ learn how to recover deleted folders
- ✓ learn how to empty the *Deleted Items* folder
- ✓ gain an understanding of quick steps
- ✓ learn how to customise default quick steps
- ✓ learn how to create a new quick step
- ✓ learn how to use quick steps
- ✓ learn how to archive messages
- ✓ learn how to recover archived messages.

CREATING A MESSAGE FOLDER

A message folder is a repository for mail messages. There are a number of standard message folders in the mailbox including the *Inbox*, *Outbox*, *Sent Items*, *Deleted Items*, and so on. You can create additional message folders to store your messages. For example, if you are involved in several projects, you could create a folder for each project to store messages.

Try This Yourself:

Open File — Before starting this exercise you MUST open the file Watsonia_04.pst...

1. Click on *Inbox* in the *Watsonia_04.pst* folder

   Let's create two new folders for the Amazon and Thames projects…

2. Click on the *Folder* tab to see the commands you can use with Outlook folders

3. Click on *New Folder* 📁 in the *New* group to open the *Create New Folder* dialog box

4. Type **Thames** in *Name*, then ensure that *Inbox* is selected under *Watsonia_04* in *Select where to place the folder*

5. Click on **[OK]** to add the new folder under *Inbox*

6. Repeat steps *2* to *5* to create a new folder called *Amazon* in the *Inbox*
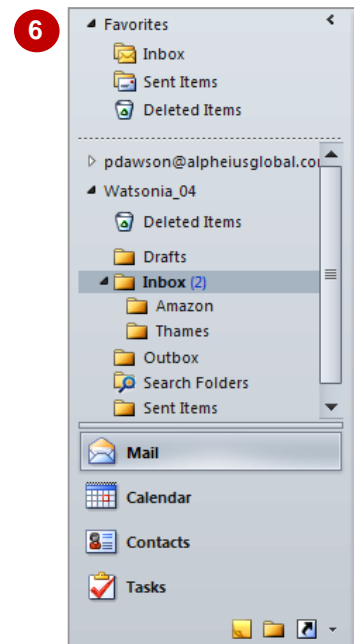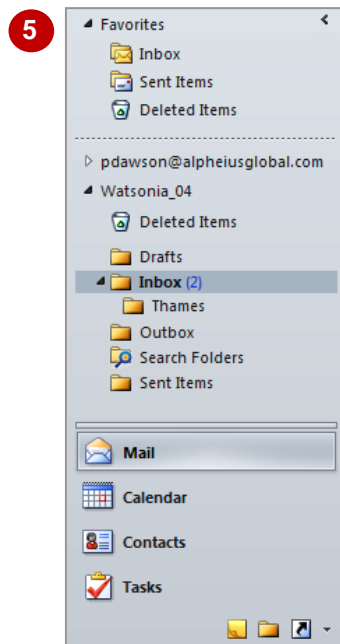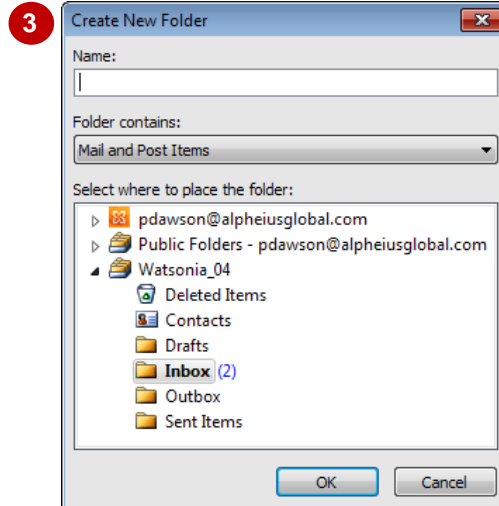
For Your Reference…

To *create* a new *message folder*:

1. Click on *New Folder* 📁 in the *New* group on the *Folder* tab
2. Type the name of the new folder and choose where to place the folder
3. Click on **[OK]**

Handy to Know…

- You can also create a new mail folder by right-clicking on an existing folder in the *Navigation* pane and selecting **New Folder**.

MOVING MESSAGES

Outlook lets you easily move messages between folders, either new folders that you have created or existing ones. There are several ways to move messages from one folder to another. Here we will show you how to use the *Move* command on the ribbon as it allows you to move messages easily into folders anywhere in your Outlook system.


Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1 Ensure that *conversations* is enabled, then click on the *Home* tab

2 Click on *Inbox*, and then click on the *Thames* conversation

3 Click on *Move* 📇 in the *Move* group to display a list of folders that you have visited recently

Your list may be different to the one shown…

4 Click on *Thames – Watsonia_04* to move the message

5 Click on *Thames* in the *Navigation* pane to see the message in this folder

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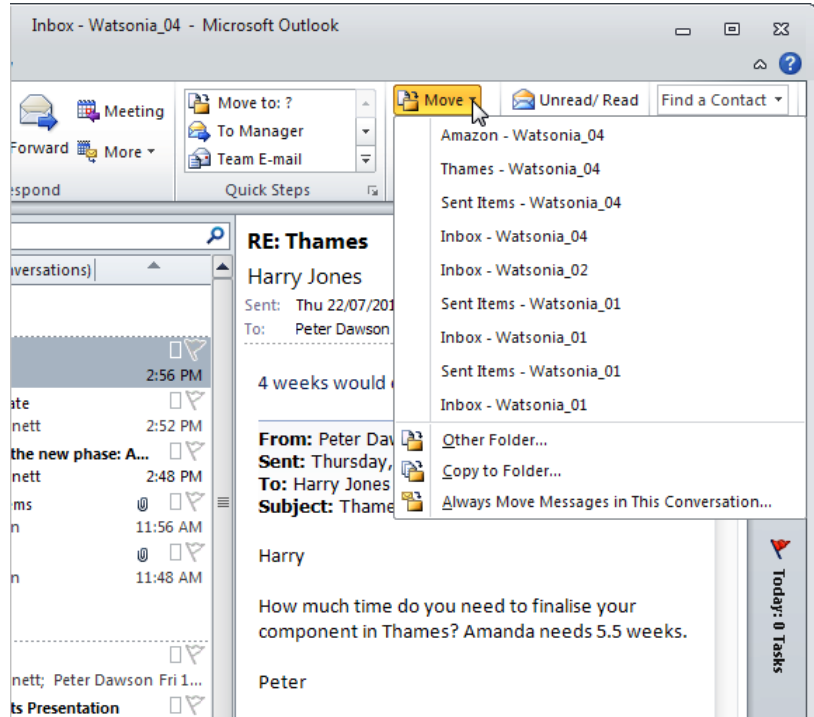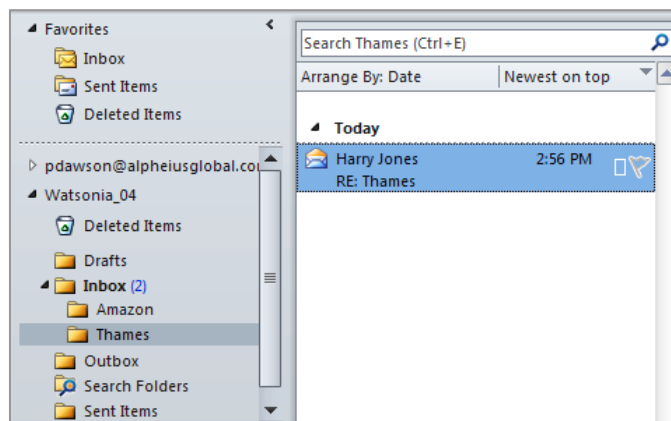
For Your Reference…

To *move messages*:

1. Select the messages to move
2. Click on *Move* 📇 in the *Move* group on the *Home* tab
3. Click on the desired folder

Handy to Know…

- You can drag messages between folders in the message list and from a folder to a folder icon in the *Navigation* pane.
- You can drag and drop folders to new locations in the same way that you can drag and drop mail messages. Any items within a moved folder will move with the folder.

COPYING MESSAGES

If you want to place a copy of a message in more than one location, Outlook allows you to copy messages between folders. And just like many other functions, there is more than one way in which you can perform this feat. You can use the ribbon, drag and drop, or the keyboard shortcut combination − Ctrl + C and Ctrl + V.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1 Click on *Inbox*, and then click on the *Introducing the new phase* conversation

2 Click on *Move* in the *Move* group, then select **Copy to Folder** to open the *Copy Items* dialog box

3 Ensure that *Thames* is selected under *Inbox*, then click on **[OK]**

Because this is a conversation, a message may display…

4 Click on **[OK]** to copy the conversation to the folder

5 Click on *Thames* to see the messages there

2

3

5
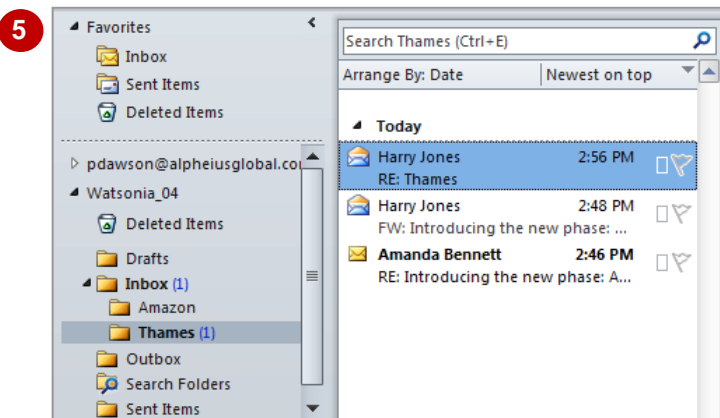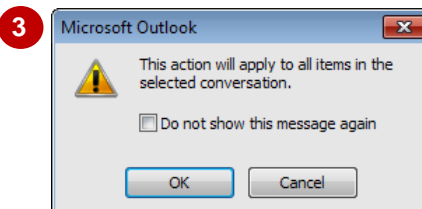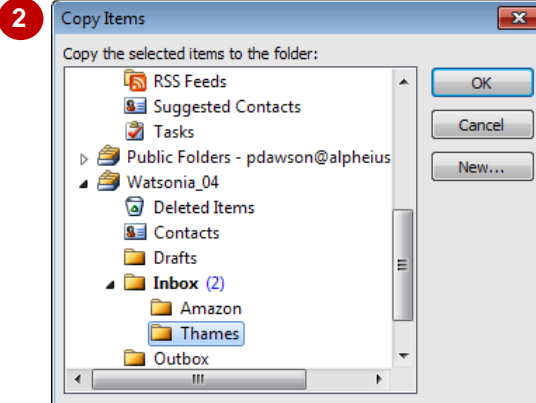
For Your Reference…

To *copy messages*:
1. Select the messages
2. Click on *Move* in the *Move* group, then select **Copy to Folder**
3. Click on the name of the destination folder
4. Click on **[OK]**

Handy to Know…

- You can copy messages between folders using the drag and drop method. To do this, select the messages to be copied in the message list, and then press Ctrl while you drag them to a new folder in the *Navigation* pane.

DELETING MESSAGES

It is good housekeeping practice to purge your folders of unwanted messages. You can do this by *deleting* them. Deleting messages works a little like the *Recycle Bin* in Windows – when you delete a message, or in fact anything in Outlook, the deleted item is moved into a special *Deleted Items* folder rather than being actually deleted.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

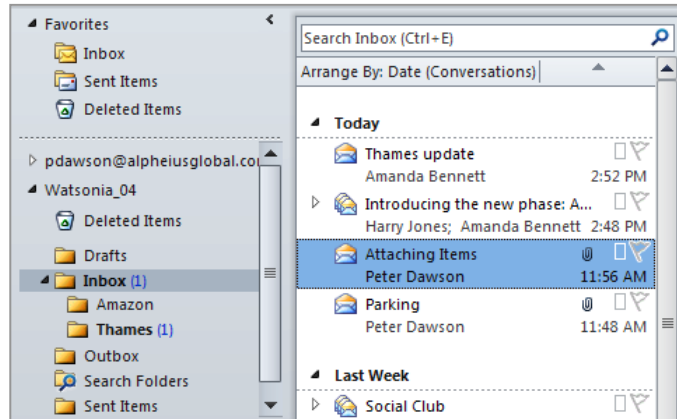1. Click on the **Inbox**, then click on the **Attaching Items** message

2. Click on **Delete** ☒ in the **Delete** group

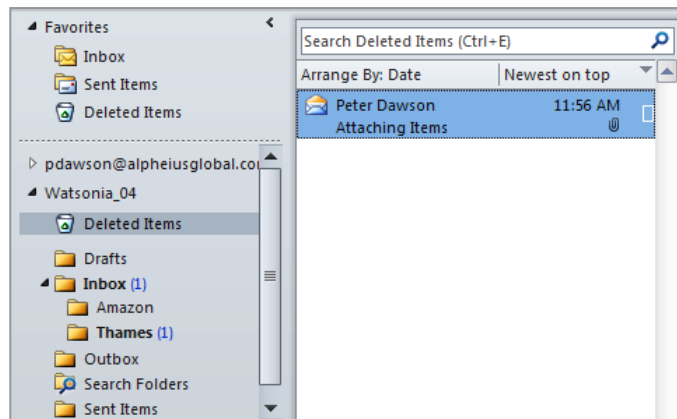   *The message will be deleted from the Inbox...*

3. Click on **Deleted Items** to see the deleted message

①
Favorites
- Inbox
- Sent Items
- Deleted Items

▷ pdawson@alpheiusglobal.co
▲ Watsonia_04
- Deleted Items
- Drafts
▲ Inbox (1)
 - Amazon
 - Thames (1)
- Outbox
- Search Folders
- Sent Items

Search Inbox (Ctrl+E)
Arrange By: Date (Conversations)

▲ Today
- Thames update — Amanda Bennett — 2:52 PM
▷ Introducing the new phase: A... — Harry Jones; Amanda Bennett — 2:48 PM
- Attaching Items — Peter Dawson — 11:56 AM
- Parking — Peter Dawson — 11:48 AM

▲ Last Week
▷ Social Club

③
Favorites
- Inbox
- Sent Items
- Deleted Items

▷ pdawson@alpheiusglobal.co
▲ Watsonia_04
- Deleted Items
- Drafts
▲ Inbox (1)
 - Amazon
 - Thames (1)
- Outbox
- Search Folders
- Sent Items

Search Deleted Items (Ctrl+E)
Arrange By: Date | Newest on top

Peter Dawson — 11:56 AM
Attaching Items

For Your Reference…

To *delete* a *message*:

1. Select the messages you wish to delete
2. Click on **Delete** ☒ in the **Delete** group on the **Home** tab

Handy to Know…

- If you delete items from the **Deleted Items** folder, they will be permanently removed from Outlook.

- You can permanently delete a selected message from any folder by pressing Shift + Del . A message asking you to confirm your intention will appear.

RECOVERING DELETED MESSAGES

When you delete a message from all folders except **Deleted Items**, they will be automatically removed from the folder and added to the **Deleted Items** folder. If you change your mind or if you realise that you deleted the wrong message, you can recover a message from **Deleted Items** and move it back to the original folder.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1 Click on **Deleted Items** in the **Navigation** pane, then click on the **Attaching Items** message to select it

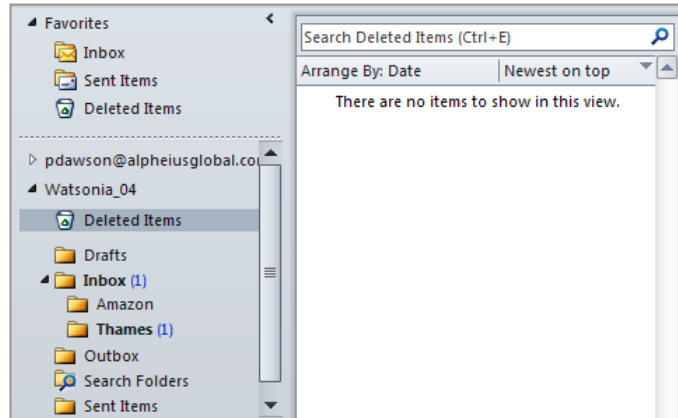*Let's return this message to the Inbox...*

2 Right-click on the **Attaching Items** message and select **Move** > **Inbox – Watsonia_04**

If Inbox – Watsonia_04 isn't listed, click on Other Folder, select Inbox under Watsonia_04 and click on [OK].
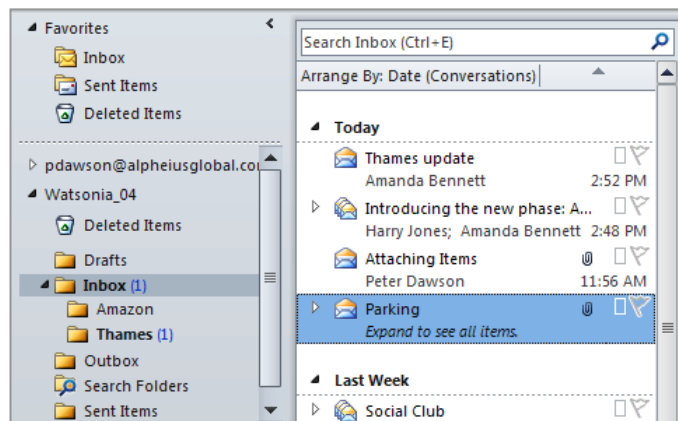
The message will disappear from the Deleted Items folder...

3 Click on **Inbox** to ensure the message has reappeared again

For Your Reference…

To **recover** deleted messages:

1. Select the messages in **Deleted Items**
2. Right-click on a selected message and select **Move** > *folder name*

Handy to Know…

- You can delete or recover multiple messages simultaneously. To do this, click on the first message, then press Ctrl and click on the desired messages. Press Del to delete them or right-click on them and select **Move** > *folder name* to recover deleted messages.

CLEANING UP CONVERSATIONS

Because each message in a conversation includes earlier messages, all messages other than the most recent one (or one for each branch if a conversation has split) are redundant. The

Clean Up function moves to the *Deleted Items* folder all redundant messages in a conversation except for messages that have not been read, are flagged or include attachments.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1 Click on the *Inbox*, then expand the *Social Club* conversation

It has five messages…

2 Collapse the conversation, then click on *Clean Up* in the *Delete* group on the *Home* tab and select **Clean Up Conversation**

A message may appear…

3 Click on **[Clean Up]**

Another message may appear…

4 Click on **[OK]**

Now only the final message in the conversation remains in the Inbox...

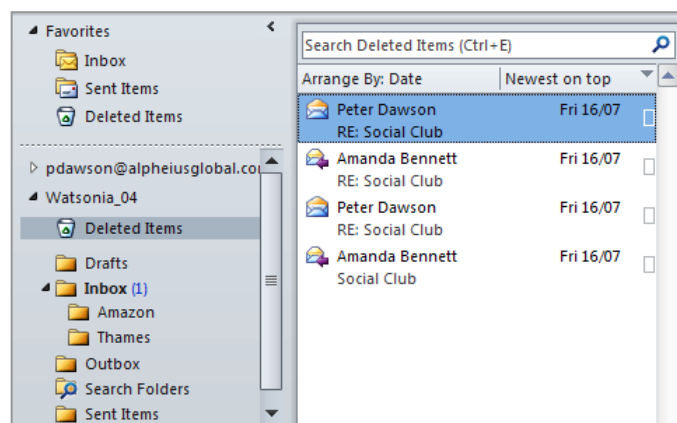**5** Click on *Deleted Items* in the *Navigation* pane to see the redundant messages
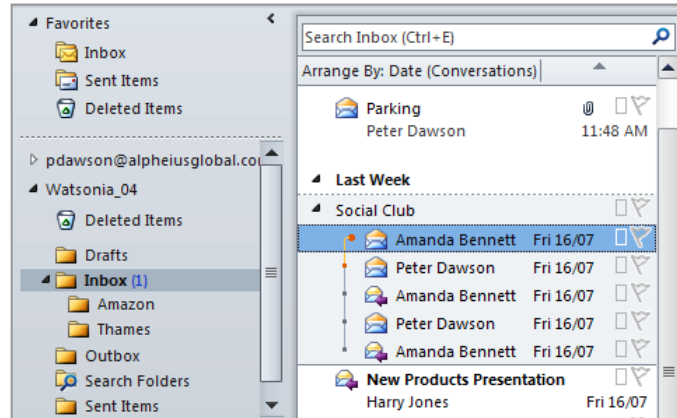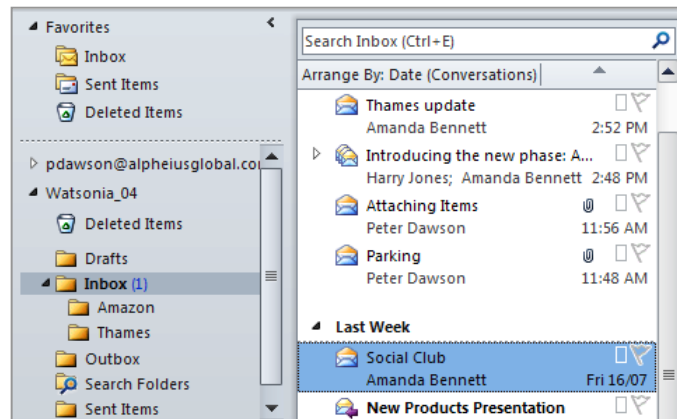
For Your Reference…

To *clean up* a *conversation*:

1. Click on the conversation
2. Click on *Clean Up* in the *Delete* group on the *Home* tab
3. Select **Clean Up Conversation**

Handy to Know…

- If you have numerous conversations in a folder, you can use the *Clean Up Folder* or *Clean Up Folder & Subfolders* options on *Clean Up* to clean them simultaneously.

WORKING WITH FAVOURITES

The *Favourites* folders provide a useful way to ensure that the folders you use regularly are easily accessible. They appear at the top of the *Navigation* pane. Another nifty thing about the

Favourites folders is that you can organise the folder list in an order that suits you – the folders are not automatically positioned in alphabetical order as they are in the other panes.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1   Ensure the *Favourites* folders list is expanded at the top of the *Navigation* pane

   Notice that three folders are included under Favourites in our sample...

2   Right-click on *Amazon* and select **Show in Favourites**

   Amazon will appear at the bottom of Favourites as well as in the original location...

3   Repeat step *2* to add *Drafts* to *Favourites*

   Let's re-order the folders in the Favourites list...

4   Drag *Drafts* to the top of the folders list in *Favourites*

   You can remove folders just as easily...

5   Right-click on *Amazon* and select **Remove from Favourites**

6   Repeat step *5* to remove *Drafts* as well
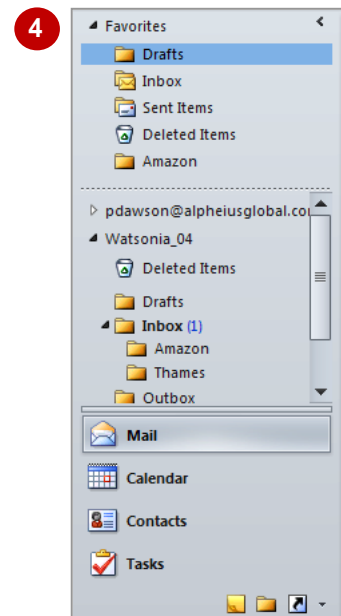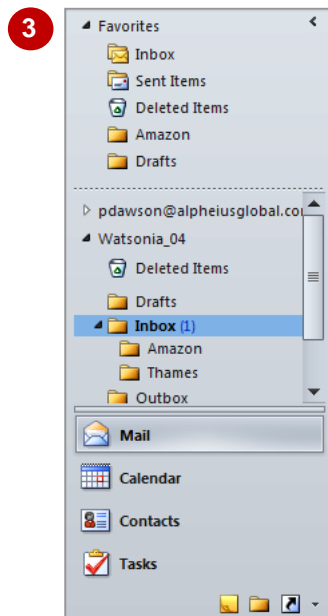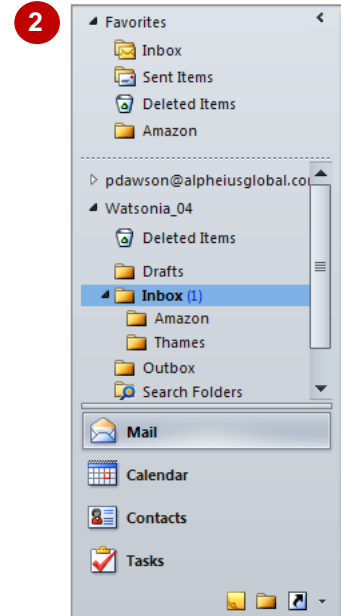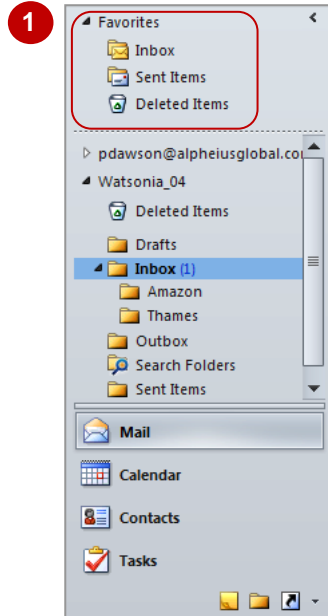
For Your Reference…

To work with the *Favourites* folders list:
- Right-click on a folder and select **Show in Favourites**
- Drag the folder to the desired location in the folder list
- Right-click on a folder and select **Remove from Favourites**

Handy to Know…

- The *Favourites* folders list can have top-level folders only, not subfolders.
- When the *Navigation* pane is minimised each folder in *Favourites* will appear in its own vertical folder button. The length of each button is determined by its folder name so keep them short.

DELETING MESSAGE FOLDERS

Just like managing your messages, you should take care that the folders you create don't get out of hand. Otherwise, you'll spend a significant amount of time looking for emails that you think you've kept – somewhere! You can tidy up your mail storage area by deleting unwanted and redundant folders

Try This Yourself:

Same File

*Continue using the previous file with this exercise, or open the file Watsonia_04.pst...*

1 Double-click on **Thames** in the **Inbox** to ensure that the folder is selected

The folder name must be highlighted in blue to be selected, not grey...

2 Click on the **Folder** tab, then click on **Delete Folder** 🗑 in the **Actions** group

Outlook will ask you to confirm your intention of deleting the folder...

3 Click on **[Yes]** to delete the folder − actually, the folder plus its messages are simply relocated to the **Deleted Items** folder
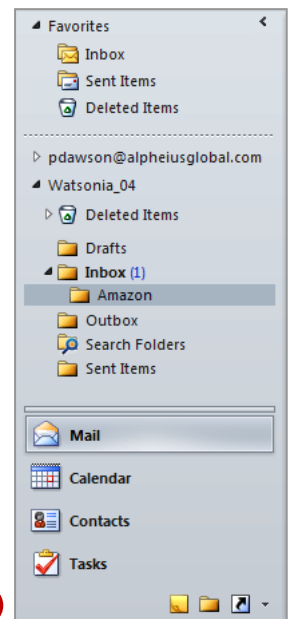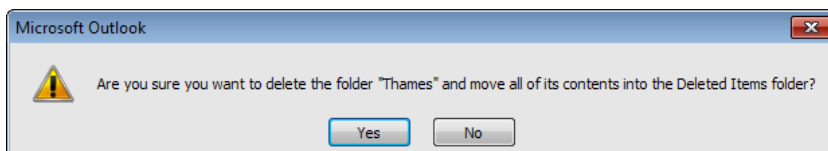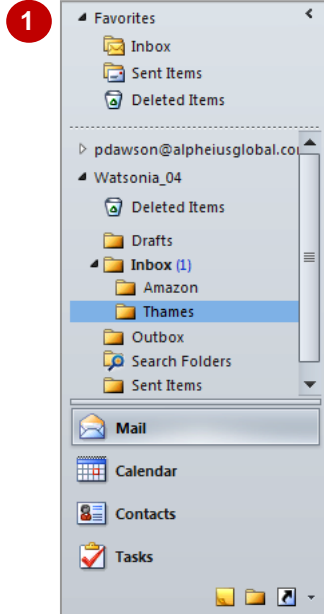
For Your Reference…

To **delete** a **message folder**:

1. Double-click on the folder in the **Navigation** pane
2. Click on **Delete Folder** 🗑 in the **Actions** group on the **Folder** tab
3. Click on **[Yes]**

Handy to Know…

- You can also delete a message folder by right-clicking on it in the **Navigation** pane and selecting **Delete Folder**.

RECOVERING DELETED FOLDERS

Sometimes, you inadvertently delete the wrong folder or you simply just want to access a folder that you previously deleted. Whatever the reason Outlook allows you to recover previously deleted folders and their content, providing they are still in the *Deleted Items* folder.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1   Double-click on *Deleted Items* to expand the folder
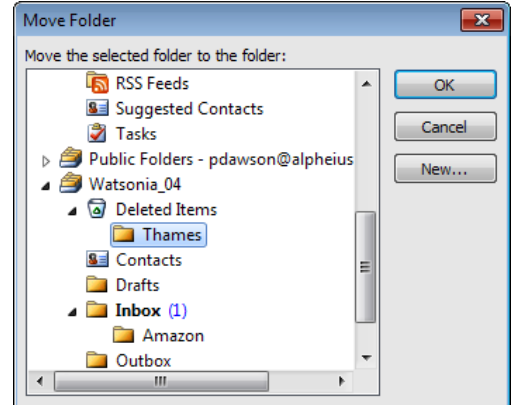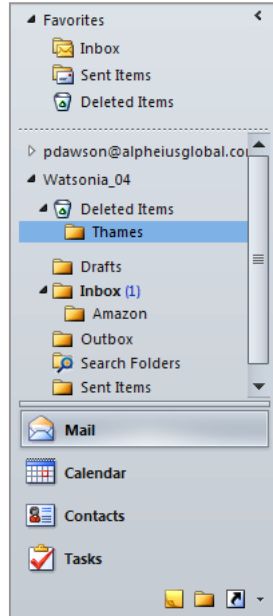
2   Double-click on *Thames* under *Deleted Items* to select the folder

   The folder name must be highlighted in blue to be selected, not grey...

3   Click on *Move Folder* 📋 in the *Actions* group to open the *Move Folder* dialog box

4   Click on *Inbox* in the *Watsonia_04* folder to nominate it as the destination folder and click on **[OK]**
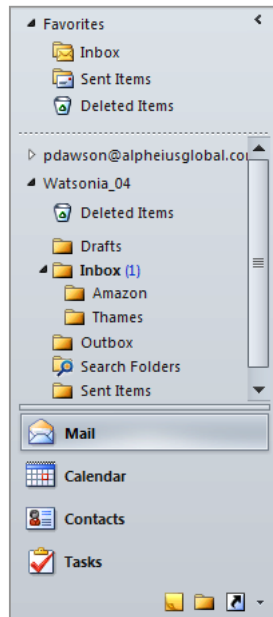
For Your Reference…

To *recover* a deleted folder:

1. Double-click on the folder in *Deleted Items*
2. Click on *Move Folder* 📋 in the *Actions* group
3. Click on the destination folder
4. Click on **[OK]**

Handy to Know…

- When you recover a deleted folder, all messages in the folder will be recovered as well as the folder itself.

EMPTYING DELETED ITEMS

When you delete a message (or most other items for that matter) it is normally placed in the *Deleted Items* folder. This is like the last staging post where you can, if necessary, recover deleted items. But, without regular maintenance this folder will become full of unnecessary items and should be emptied periodically.

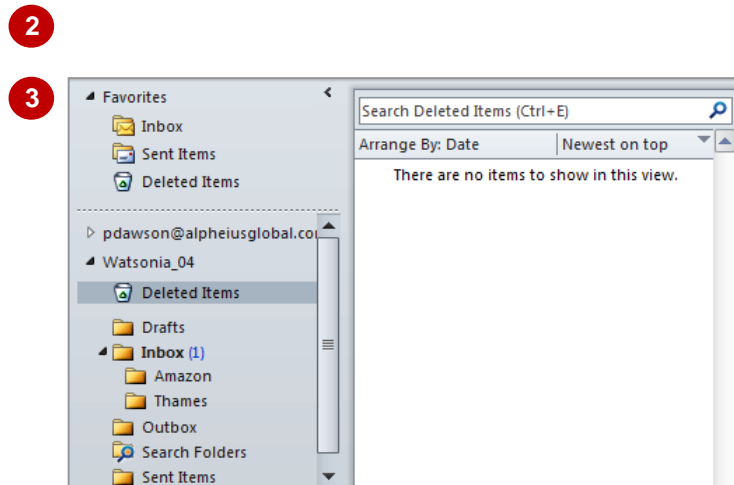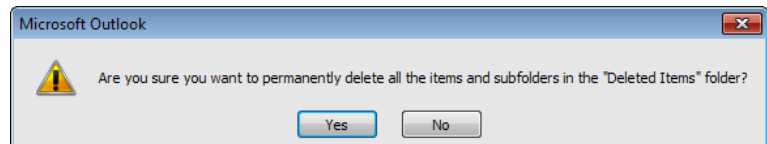## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1   Click on *Deleted Items* to see the contents in this folder

2   Right-click on *Deleted Items* and select **Empty Folder**

Outlook will ask you to confirm your intention of emptying the folder...

3   Click on **[Yes]** to permanently delete the files in *Deleted Items*

1

2

3
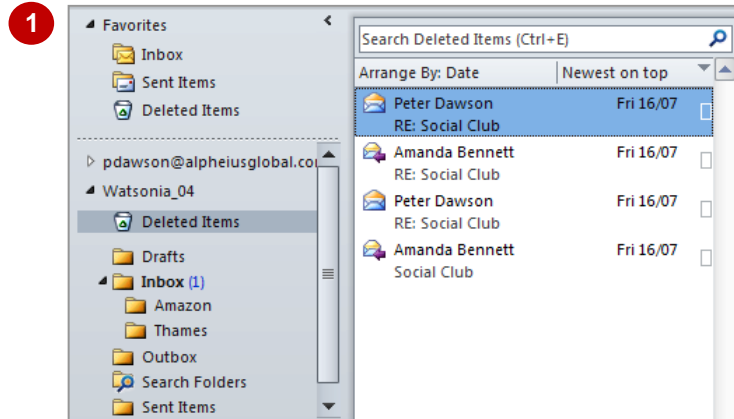
For Your Reference…

To *empty* the *Deleted Items* folder:

1. Right-click on *Deleted Items*
2. Select **Empty Folder**
3. Click on **[Yes]**

Handy to Know…

- You can set Outlook to automatically delete *Deleted Items* whenever you exit Outlook. Click on the *File* tab, click on *Options* to open the *Options* dialog box, then click on the *Advanced* category. Tick *Empty Deleted Items folder when exiting Outlook* under *Outlook start and exit*.

AUTOMATING COMMON TASKS WITH QUICK STEPS

Many emails you receive involve more steps than simply reading them and leaving them in your Inbox. Sometimes you may need to move them to another folder, create a meeting or

appointment, forward them to other members of your team, or any combination of a number of tasks. Using Outlook's *Quick Steps*, you can perform multiple tasks with a single click.

Outlook's Default Quick Steps

Outlook 2010 ships with a set of five default quick steps in the **Quick Steps** gallery on the *Home* tab as shown to the right. You can customise these, plus create your own custom quick steps.

The default quick steps allow you to perform the following actions.

Move to   Moves the selected message to a mail folder you specify and marks the message as read.

To Manager   Forwards the message to your manager. If your company uses Microsoft Exchange Server, your Manager's name will be detected in the global address list and inserted into **To**, or you can specify the recipient.

Team E-mail   Forwards the message to others in your team. If your company uses Microsoft Exchange Server, your team members' names will be detected in the global address list and inserted into **To**, or you can specify the recipients.

Done   Moves the message to a specified mail folder, marks the message as complete and then marks the message as read.

Reply & Delete Opens a reply to the selected message and then deletes the original message.

Create New   This tool lets you create a new quick step to execute any sequence of commands and name it.

The first time you click on the default quick steps, other than **Reply & Delete**, a dialog box will display allowing you to customise the quick step to suit your needs.

Customising Quick Steps

You can customise any quick step – not just the default quick steps. You do this by selecting **Manage Quick Steps** in the expanded *Quick Steps* gallery to open the *Manage Quick Steps* dialog box (as shown below). From this dialog box you can create new quick steps and edit, duplicate and delete existing quick steps.
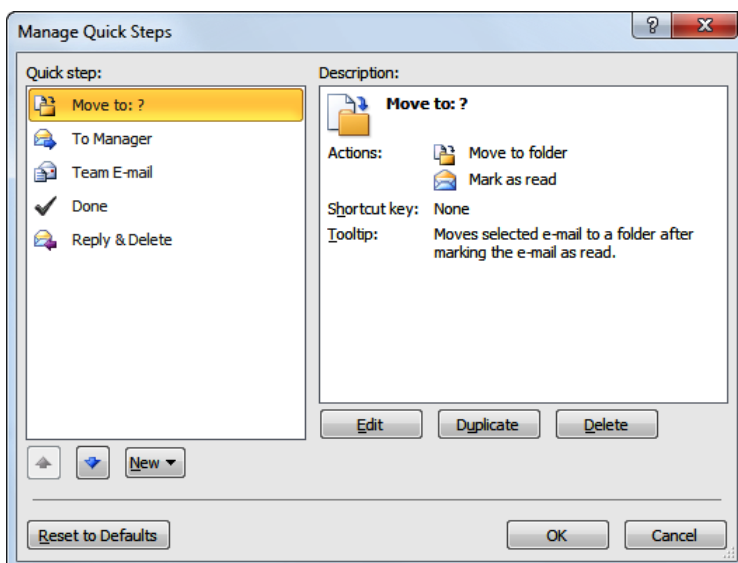
CUSTOMISING A DEFAULT QUICK STEP

Outlook 2010 has introduced *Quick Steps* to help you manage and organise your messages. To get you started they have provided five default quick steps (plus *Create New*) for performing some of the most common Outlook tasks. When you first click on a default quick step, other than *Reply & Delete*, you will be prompted to customise it to best fit your working style.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1. Click on the *Home* tab, then click on *Move to* in the *Quick Steps* gallery to open the *First Time Setup* dialog box

2. Click on the drop arrow ⏷ for *Move to folder* and select *Amazon – Watsonia_04*

    The folder you select here will automatically appear in Name. Let's change it to something more appropriate since this is the name that will be listed in the Quick Steps gallery…

3. Select the contents in *Name*, then type **Amazon**

4. Ensure that *Mark as read* is ticked, then click on **[Save]**

    The default Move to quick step will now appear as Amazon
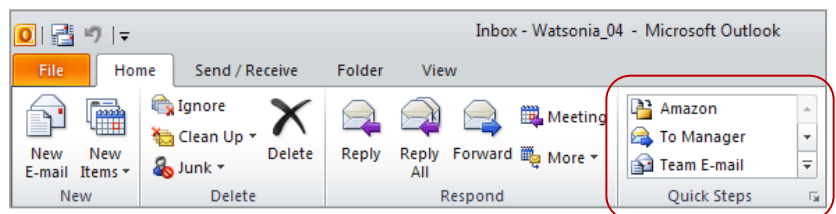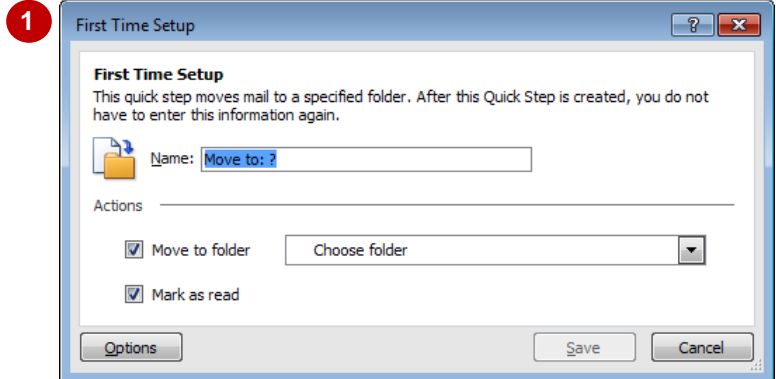
For Your Reference…

To *customise* a *default quick step*:

1. Click on the default quick step on the *Home* tab
2. Set the options as desired
3. Click on **[Save]**

Handy to Know…

- You can customise any quick step by clicking on the *More* button ⏷ for *Quick Steps* and selecting *Manage Quick Steps* to open the *Manage Quick Steps* dialog box. Here you can choose to edit, duplicate or delete an existing quick step, or create a new quick step.

CREATING A QUICK STEP

Quick steps enable you to simultaneously apply multiple actions to a selected message. This can help you to quickly manage your mailbox. Creati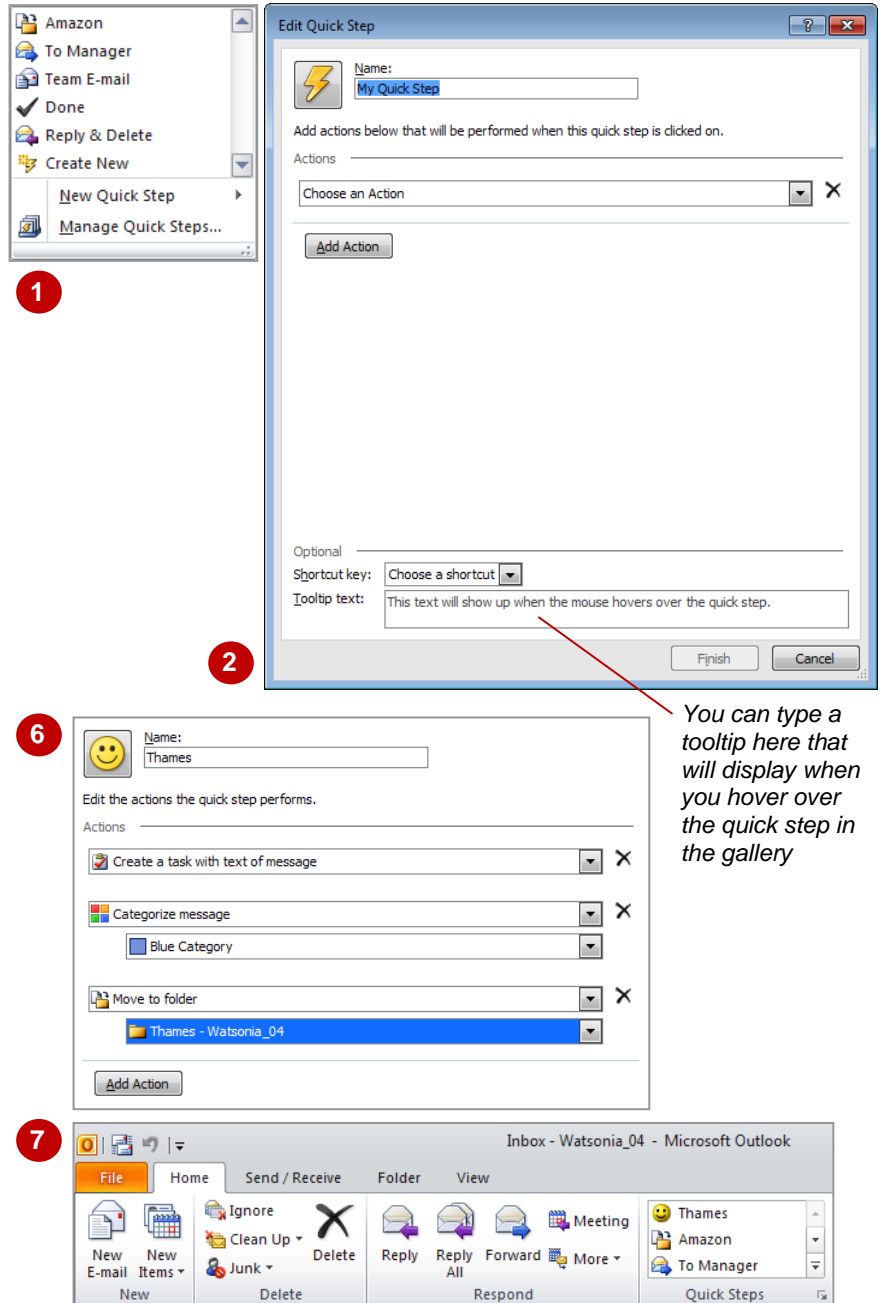ng new quick steps is simple. You can create them by specifying all actions (as you will do in this exercise), by selecting a particular type of quick step to create (such as a *Forward To*), or by duplicating and changing an existing quick step.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Click on the *More* button for *Quick Steps* to open the *Quick Steps* gallery

2 Click on *Create New* to open the *Edit Quick Step* dialog box

3 Type **Thames** in *Name*, then click on the large square to the left of *Name* to open the *Choose an icon* dialog box

4 Click on the smiley face, then click on **[OK]** to change the icon

5 Click on the drop arrow for *Choose an Action* and select *Create a task with text of message*

6 Click on **[Add Action]** and repeat step *5* to add two actions: *Categorise message* (*Blue category*) and *Move to folder* (*Thames – Watsonia_04*)

7 Click on **[Finish]** to add the new quick step to the top of the *Quick Steps* gallery

You can type a tooltip here that will display when you hover over the quick step in the gallery

For Your Reference…

To *create* a *quick step*:
1. Click on *Create New* in the *Quick Steps* gallery
2. Type a *Name* and select an *icon* (optional)
3. Select an action in *Choose an Action*
4. Click on **[Add Action]** as needed
5. Click on **[Finish]**

Handy to Know…

- If you want to create a quick step that is very similar to an existing one, select *Manage Quick Steps* in the gallery, click on the existing quick step and click on **[Duplicate]**. You can then modify the details as desired.

- You can also create a quick step by selecting **New Quick Step** in the *Quick Step* gallery.

USING QUICK STEPS

When you work with your emails, you will find that you tend to do many repetitive tasks. For instance, you might move all messages relating to a specific project to a folder for that project, or you may often forward copies of important messages to your manager. Using *quick steps*, you can perform repetitive tasks such as these, and more, with a single click.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1. Click on the *Introducing the new phases* conversation, then click on the *Amazon* quick step

   Being a conversation, a message may appear…

2. Click on **[OK]**

   All messages in the conversation will be moved to the Amazon folder…

3. Click on *Amazon* to see the two messages

4. Click on *Thames update* in the *Inbox*, then click on the *Thames* quick step

   A task will be created as the first action…

5. Click on *Save & Close* 🖫 in the *Actions* group to close the task

6. Click on *Thames*, then click on the *Thames Update* message to see it in the *Reading* pane

   Notice that the blue category has been applied to the message
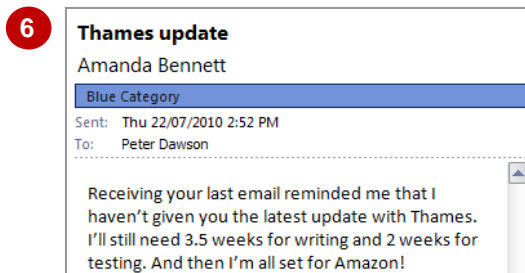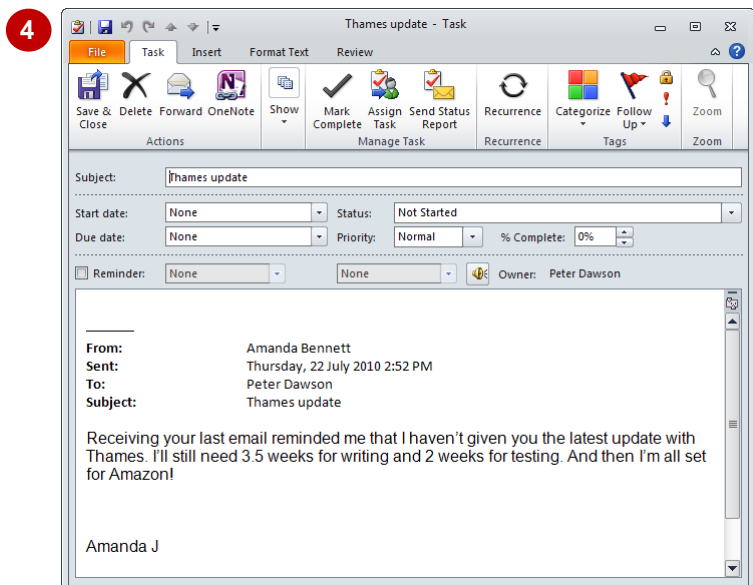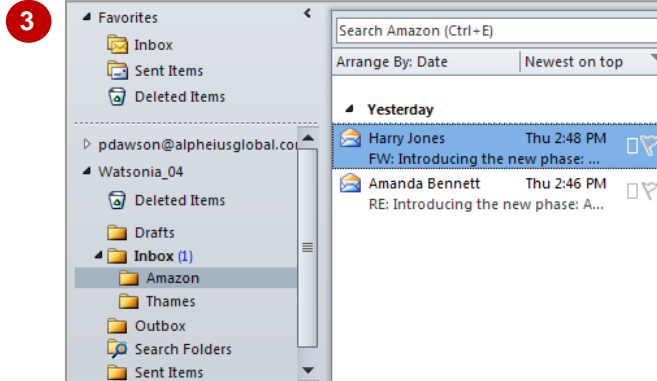
For Your Reference…

To *use* a *quick step*:

1. Select the message in the message list
2. Click on the quick step in the *Quick Step* gallery

Handy to Know…

- To make a quick step's function clearer, you can add a tooltip that will appear when you hover over it in the *Quick Step* gallery. You can do this by typing the desired text in *Tooltip Text* at the bottom of the *Edit Quick Step* dialog box either when you create a quick step or by editing it later.

ARCHIVING MESSAGES

Over a period of time your mailbox folders will begin to grow as they fill with messages – especially the *Inbox*. You can of course elect to delete messages. But, as an alternative you can archive messages to a file. This will enable you to retrieve those messages again in the future should the need arise.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1. Click on the *Inbox* then click on the *File* tab to open the *Backstage*

2. Click on **[Cleanup Tools]** and select **Archive** to open the *Archive* dialog box

3. Scroll down to and click on *Inbox* under *Watsonia_04*

4. Click on the drop arrow ⏷ for *Archive items older than* and click on **[Today]**

5. Click on **[Browse]** to open the *Open Outlook Data Files* dialog box, and then navigate to the course files folder

6. Type **Archive_1** in *File name* and click on **[OK]** to return to the *Archive* dialog box

7. Click on **[OK]**

   All messages received before today will be removed from the Inbox and included in the newly created archive file, Archive_1.pst...

8. Press Esc to return to the Inbox, then right-click on *Archives* in the *Navigation* pane and select **Close "Archives"**

3

8
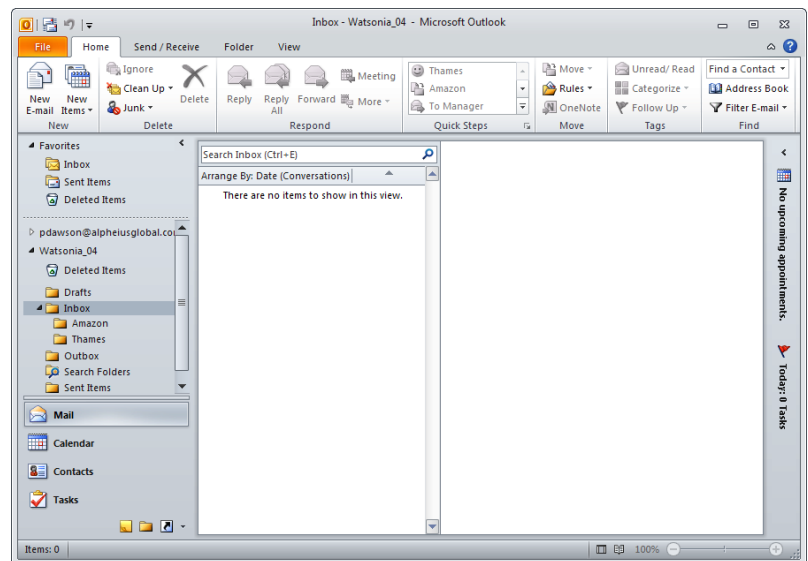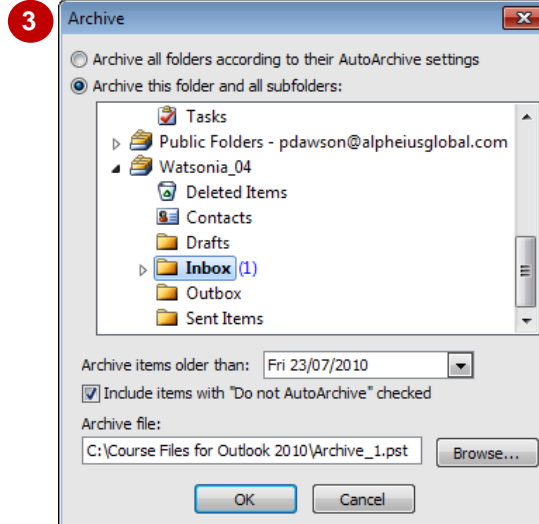
For Your Reference…

To *archive messages*:

1. Click on the *File* tab
2. Select **[Cleanup Tools]** > **Archive**
3. Specify the date
4. Specify the archive file name and location
5. Click on **[OK]**

Handy to Know…

- You can set older Outlook items to be archived automatically on a regular interval. To do this click on the *File* tab, click on *Options* and select the *Advanced* category. Click on **[AutoArchive Settings]**.

RECOVERING ARCHIVED MESSAGES

If you have archived your email messages properly into Outlook archive data files and you know exactly where they are located, it is relatively easy to recover archive files. This might be useful if you need to locate a message from a while ago that may have just recently come into contention again.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_04.pst...

1 Click on *Inbox* then click on the *File* tab to open the *Backstage*

2 Click on *Open* then click on *Import* to open the *Import and Export Wizard*

3 Ensure that *Import from another program or file* is selected, then click on [Next]

4 Scroll down to and click on *Outlook Data File (.pst)* and click on [Next]

5 Click on [Browse] and navigate to the course files folder

6 Click on *Archive_1.pst* and click on [Open]

7 Click on [Next] to specify the folder into which the data will be imported

8 Click on *Inbox* and click on [Finish] to complete the import operation

9 Click on *Inbox* to check that the messages have reappeared
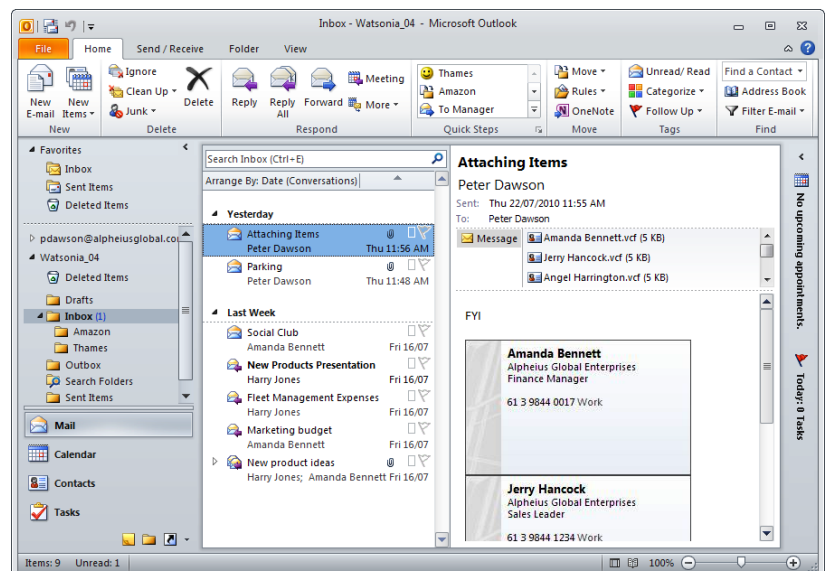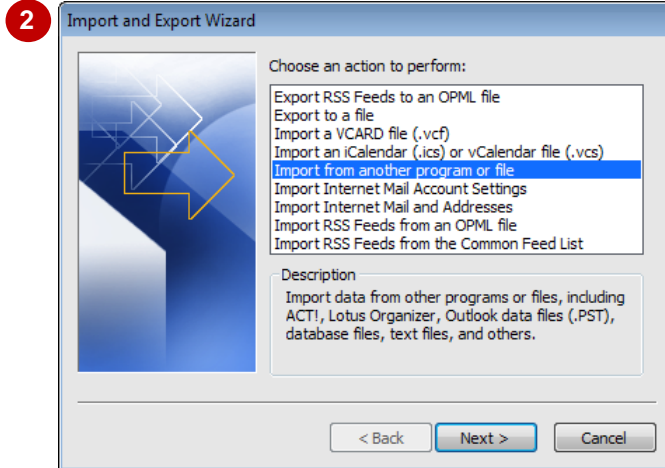
For Your Reference…

To *recover archived messages*:

1. Select **File** > **Open** > **Import**
2. Select *Import from another program or file* and *Outlook Data File (.pst)*
3. Locate and open the archive file
4. Select the folder and click on [Finish]

Handy to Know…

- To ensure you have the best chance for finding the right archive file and as quickly as possible, clearly name all archive files.

NOTES: