CHAPTER 3   SEARCHING

INFOCUS

Because email can be used to communicate about any number of different subjects, Outlook provides a powerful search feature that you can use to quickly and easily locate messages and other Outlook items.

In this session you will:

- ✓ learn how to use the *Instant Search* feature
- ✓ learn how to expand a search
- ✓ gain an understanding of the search query syntax used for finding messages
- ✓ gain an understanding of the search query sysntax that will find messages by either date or file size
- ✓ learn how to run a recently-used search
- ✓ learn how to use the search options
- ✓ learn how to search for other *Outlook* items
- ✓ learn how to use a search folder
- ✓ learn how to add a predefined search folder
- ✓ learn how to customise predefined search folders
- ✓ learn how to create a custom search folder.

USING INSTANT SEARCH

Instant Search helps you to quickly find items in Outlook. You don't even need to type the exact term you're looking for in the **Instant Search** box, just part of it, and Outlook will highlight each

instance of matching text as it finds it. This is known as performing an incremental search. **Instant Search** is available in all areas of Outlook including Mail, Calendar, Contacts and Tasks.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file Watsonia_05.pst...

1 Ensure **Show as Conversations** is not ticked in the **View** tab, then click on **Inbox**

Let's search this folder…

2 Click on **Search Inbox (Ctrl + E)** which is located above the message list and type **prod** – this box is the **Instant Search** box

All messages containing 'prod' will be listed. Let's append additional search criteria to narrow-down the search...

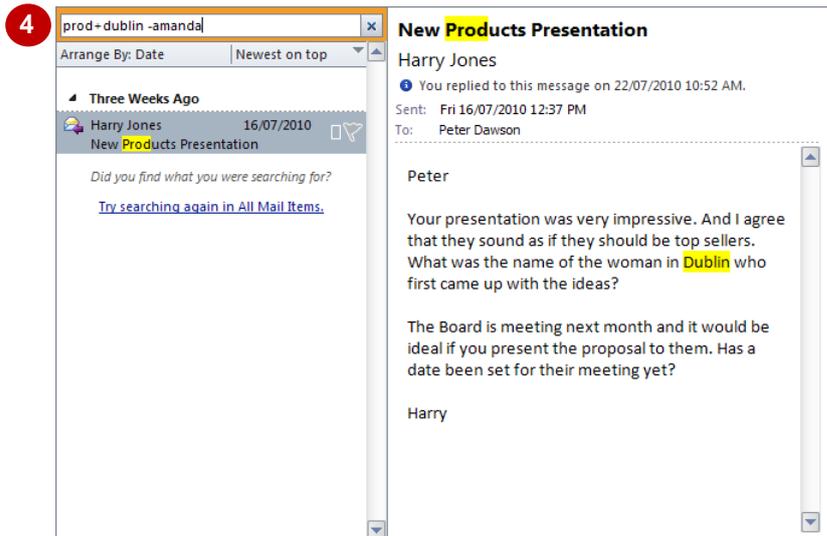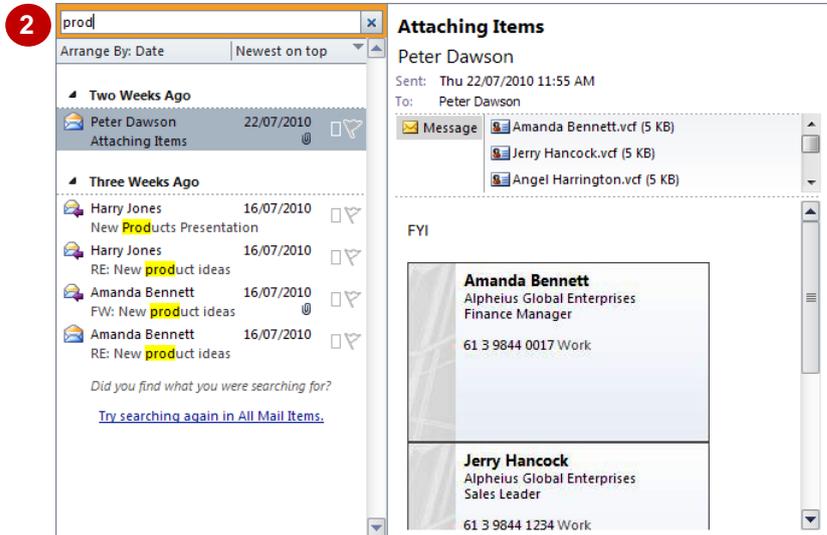**3** Type **+dublin** – now only the messages with both terms will be listed

4 Press ⌴Space⌴ and type **–Amanda**

You must press ⌴Space⌴ *prior to the minus sign. Now only messages containing both 'prod' and 'dublin' but not 'amanda' will be listed…*

5 Click on **Close Search** ☒ to turn off **Instant Search**

For Your Reference…

To **use Instant Search**:

1. Select the folder you wish to search
2. Type the search criteria in the **Instant Search** box
3. Click on the desired item

Handy to Know…

- Press `Ctrl` + `E` to access **Instant Search**.
- Attachments are searched but matching phrases aren't highlighted in the results.
- If **Close Search** ☒ appears red, Outlook is still performing the search. You can click on it while it is red to stop the search.
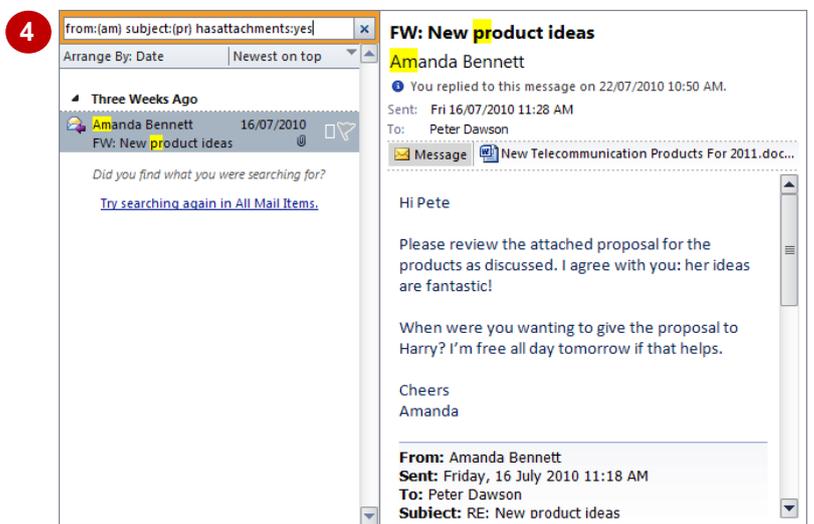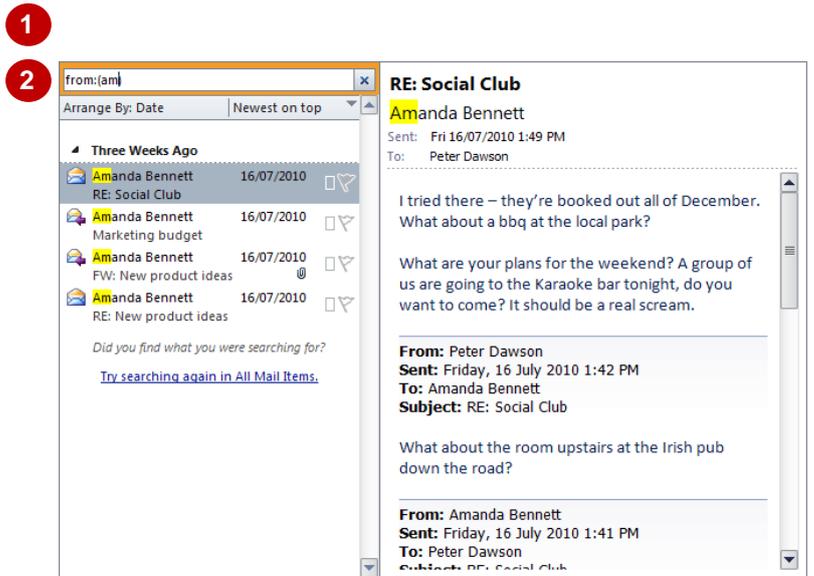

EXPANDING THE SEARCH

You can make an Outlook search quite specific using the commands on the ribbon. You can change the scope of the search to check **All Mail Items** or **All Outlook Items** for instance. You can also specify more advanced criteria such as who the item is **From**, whether it is **Unread**, and so on. By expanding the search you can see how useful and powerful the **Instant Search** feature can be.

Try This Yourself:

Continue using the previous file with this exercise...

1 Click in the **Instant Search** box

The Search Tools: Search tab will open. Let's find all messages from Amanda with attachments and 'product' in the Subject…

2 Click on **From** 🖼 in the **Refine** group and type **am**

These two characters are enough to find all messages from Amanda…

3 Click on **Subject** 📄 and type **pr** (this will find 'product')

The message list will reduce further…

4 Click on **Has Attachments** 📎

Let's check for messages conforming to these criteria in all other mail folders now…

5 Click on **All Mail Items** 🔍 in the **Scope** group

There is only one message conforming to the criteria…

6 Click on **Close Search** ❌

For Your Reference…

To specify more advanced search criteria:

1. Click in **Instant Search**
2. Click on the desired option in the **Search Tools: Search** tab of the ribbon

Handy to Know…

- If you want to perform a very specific search, you may find it useful to use the **Advanced Find** dialog box. To display this, press `Ctrl` + `E` to initiate **Instant Search**, then click on **Search Tools** ✳ in the **Options** group and select **Advanced Find**.

SEARCH QUERY SYNTAX

As you become familiar with Outlook's search query syntax, you can type your query directly into the **Instant Search** box rather than using the commands on the ribbon. The table below shows examples of searches you might find useful. Note that you can use logical operators such as AND, NOT, OR, <, >, =, and so on to refine your search, but they must be typed in uppercase.

Use the search query syntax...	To find...
sales	Items containing *sales*, *SALES*, *Sales*, *saLEs* or any other combination of uppercase and lowercase. **Instant Search** is not case sensitive.
sales europe	Items containing both *sales* and *Europe*, including *European*, but not necessarily in that order. You can also type **sales AND europe** to get the same results.
sales NOT europe	Items containing *sales*, but not *Europe*.
sales OR europe	Items containing *sales*, *Europe* or both terms.
"european sales"	Items containing the exact phrase *European sales*. Note the use of double quotation marks (" ") – the search results must match the exact phrase within the quotation marks.
from:"brad"	Items sent from *Brad*.
from:"brad" about:"markets"	Items sent from *Brad* where the term *markets* appears in the subject line, body or attachment contents.
hasattachment:yes	Items that have attachments. You can also type **hasattachments:true** to get the same results.
attachments:budget.xlsx	Items that have the attachment called *budget.xlsx* or if the attachment contains *budget.xlsx* within its contents.
subject:"sales in europe"	Items whose subject line contains the phrase *sales in Europe*.
subject:sales europe	Items with *sales* in the subject line and *Europe* anywhere else in the contents.
cc:"brad harris"	Items that display *Brad Harris* in the Cc line.
cc:brad.harris@watsoniapublishing.com	Items that include the email address *brad.harris@watsoniapublishing.com* in the Cc line.
bcc:brad	Items that include *Brad* in the Bcc line.

SEARCH QUERY SYNTAX – DATES AND SIZE

The table below shows examples of *Instant Searches* that you can perform to find messages based on their size or the date when they were sent or received. You can also use the *More*

Choices tab of the *Advanced Find* dialog box to find messages based on their size. To open this dialog box, click on *Search Tools* 🔍 and select *Advanced Find*.

Use the search query syntax...	To find...
messagesize:<20 KB	Items that are less than 20 kilobytes. Note the use of the 'less than' comparison operator (<).
messagesize:>4 MB	Items that are greater than 4 megabytes. Note the use of the 'greater than' comparison operator (>).
messagesize:tiny	Items that are less than 10 kilobytes.
messagesize:small	Items that are between 10 and 25 kilobytes.
messagesize:medium	Items that are between 25 and 100 kilobytes.
messagesize:large	Items that are between 100 and 500 kilobytes.
messagesize:verylarge	Items that are between 500 kilobytes and 1 megabyte.
received:=1/1/2010	Items that arrived on 1/1/2010. Note the use of the 'equals' comparison operator (=).
received:yesterday	Items that arrived yesterday. *Instant Search* also recognises the following date values: *Relative dates* such as today, tomorrow, yesterday *Multi-word relative dates* such as this week, next month, last week, past month, coming year *Days* such as Sunday, Monday and so on *Months* such as January, February and so on.
received:>=10/1/10 AND received:<=10/5/10	Items that arrived between 10/1/10 and 10/5/10.
received:>10/1/10 AND received:<10/5/10	Items that arrived after 10/1/10 but before 10/5/10.
from:brad (received:1/7/10 OR received:1/8/10)	Items from *Brad* that arrived on either 1/7/10 or 1/8/10. Note the use of parentheses to group the dates.
sent:yesterday	Items that you sent yesterday.
due:last week	Items that are flagged for follow up last week.

USING RECENT SEARCHES

If you perform the same few queries in Outlook on a regular basis, you'll love the fact that Outlook remembers the ten most recently-performed searches. This means that you can quickly and easily repeat any of these searches again with just a few clicks of the mouse.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_05.pst...
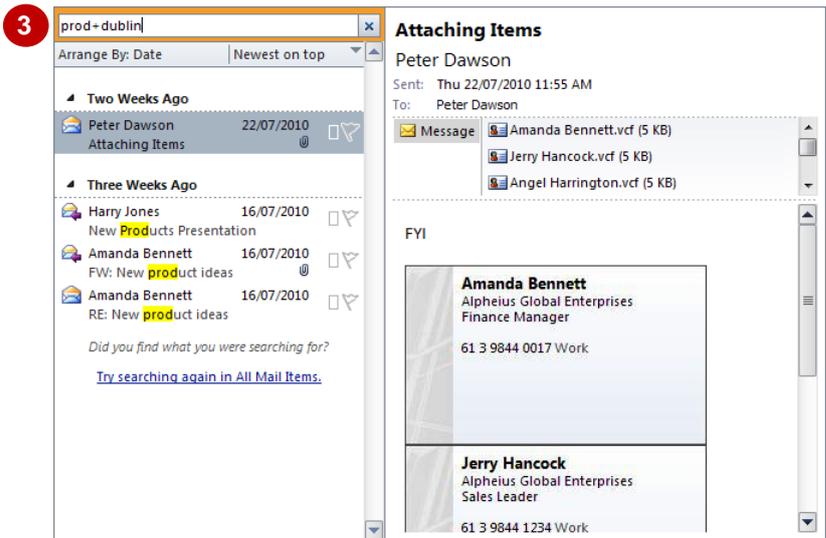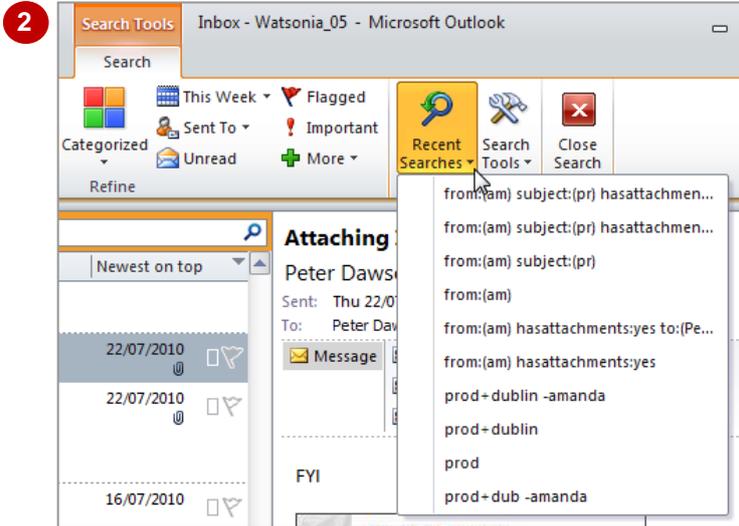
1. Click in the *Instant Search* box to display the *Search Tools: Search* tab

2. Click on *Recent Searches* 🔎 in the *Options* group to display a list of searches that you've recently performed

   Your list may look different to the one shown here…

3. Click on one of the searches in the list to re-do the search

4. Click on *Close Search* ☒ to close *Instant Search*

For Your Reference…

To *perform* a *recent search*:

1. Click in *Instant Search*
2. Click on *Recent Searches* 🔎 in the *Options* group
3. Select the desired query

Handy to Know…

- Outlook displays the search query syntax (such as *Europe − sales*) that was used to perform each of the searches that are included on the *Recent Searches* list.
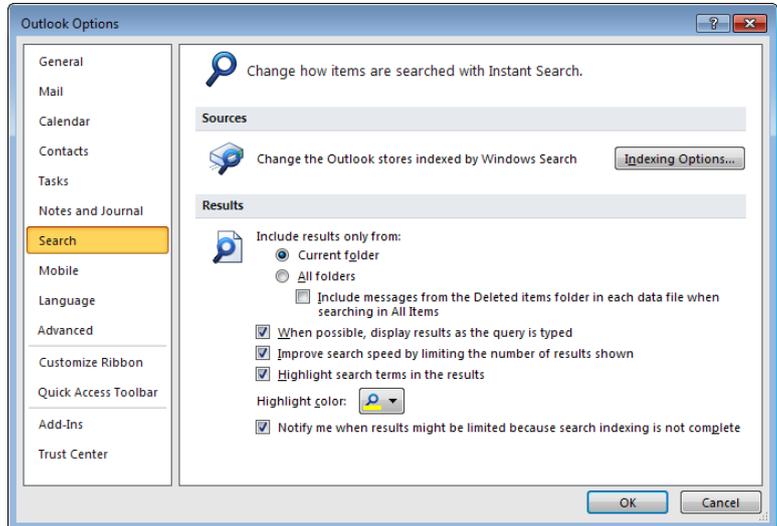
SEARCH OPTIONS

The *Search Options* control how Outlook uses the *Instant Search* feature. For instance, the search results appear automatically by default as you type criteria into the *Instant Search* box.

This is helpful as you can see immediately whether or not you have found the desired information. In this exercise you'll change two settings to see how they work, and then you'll change them back again.

Try This Yourself:

Continue using the previous file with this exercise...

1 Click in *Instant Search*, then click on *Search Tools* and select *Search Options* to open the *Search Options* dialog box

2 Remove the tick from *When possible, display results as the query is typed* under *Results*

3 Click on *Highlight colour* to display a *Colour* box, then click on the pink swatch

The Highlight colour tool will appear pink...

4 Click on **[OK]** to apply the changes

5 Type **prod** in *Instant Search*

Nothing will happen – the search results no longer appear automatically as you type...

6 Press Enter or click on *Search* to activate the search

Product will be highlighted in pink. Let's reset the settings...

7 Repeat steps *1* to *4* to tick *When possible…* and change *Highlight colour* to yellow

8 Click on *Close Search*

1
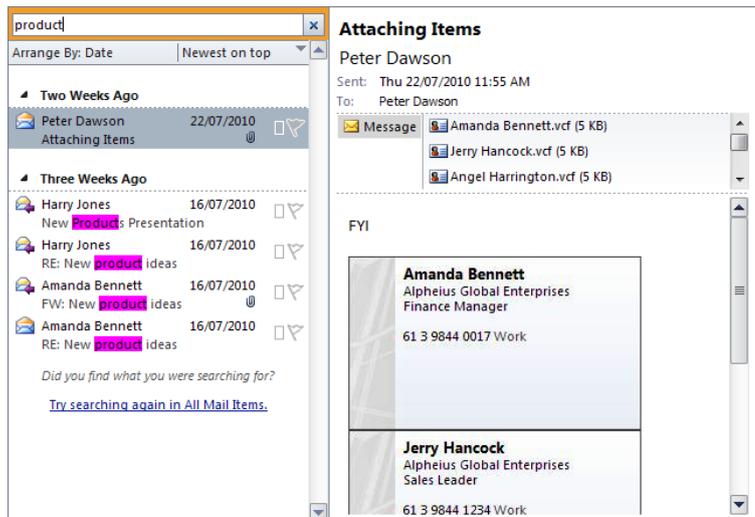
6

For Your Reference…

To *change* the *search options*:

1. Click in *Instant Search*
2. Click on *Search Tools* and select *Search Options*
3. Make the desired changes
4. Click on **[OK]**

Handy to Know…

- If you click on *Try searching again in All Mail Items* at the bottom of the search results, the *Deleted Items* folder will not be searched by default. To include this folder, tick *Include messages from the Deleted Items folder in each data file when searching All Items* in the *Search Options*.

SEARCHING OTHER OUTLOOK ITEMS

In addition to using *Instant Search* to find specific mail messages, you can use this feature to search in other Outlook folders such as Calendar, Contacts, Journal, and so on. Although you use the same method as when you are searching for Mail items, some of the options on the ribbon will change slightly depending on the folder that is currently active.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_05.pst...

1. Click on *Contacts* in the Navigation pane, then click on *Contacts – Watsonia_05* under *My Contacts*

2. Click in the *Instant Search* box and type **lead**

   All contacts who are Leaders will be listed...

3. Type **+leg**

   Now only the Legal Services Leader will be listed...

4. Click on *Close Search* ☒ to clear the search criteria

   Let's find contacts in a specific company...

5. Press Ctrl + E, click on *More* ➕▾ and select **Company** to insert a search field

6. Type **agm**

   We don't have a contact from this company but you can create a new one by double-clicking on the link…

7. Click on *Remove* ☒ to the right of the *Company* field, click on *Close Search* ☒, then click on *Mail* in the *Navigation* pane
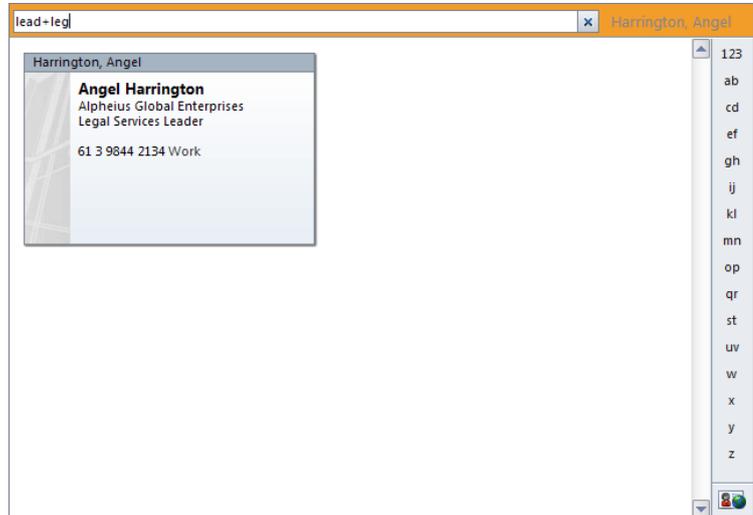
For Your Reference…

To *search* for *other Outlook items*:

1. Open the desired folder by clicking on its button in the *Navigation* pane
2. Click in the *Instant Search* box
3. Type the search criteria

Handy to Know…

- If a search doesn't find what you're looking for, try widening it by clicking on *Try searching again in All Items* at the bottom of the search results.
- If you don't remove a search field prior to closing a search, it will appear the next time you activate *Instant Search*.

USING A SEARCH FOLDER

Search folders are special folders that group together messages from your mailbox that conform to specific criteria. For example, all unread messages will appear in the *Unread Mail* search folder. Search folders are *virtual* folders. This means that they don't store another copy of the messages, they merely *point* to the folder storing the messages such as the *Inbox*.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_05.pst...

1 Click on the *expand* icon ▷ for *Search Folders* in the *Navigation* pane to see the three default search folders, then click on *Unread Mail*

Currently, this folder is empty...

2 Click on *Inbox*, select the top four read messages, then click on *Unread / Read* 📧 in the *Tags* group

3 Click on *Unread Mail* under *Search Folders* to see the unread messages

4 Ensure that the *Reading* pane is displayed, then click on each message so that you have effectively read each message

5 Click on *Inbox* and notice that these messages have now been read

The Unread Mail search folder will now be empty
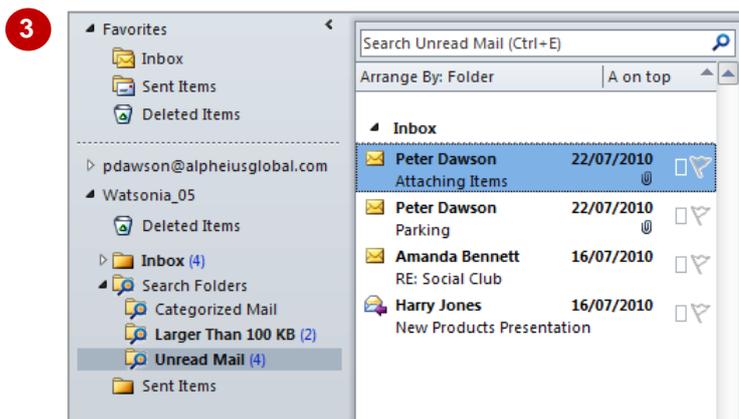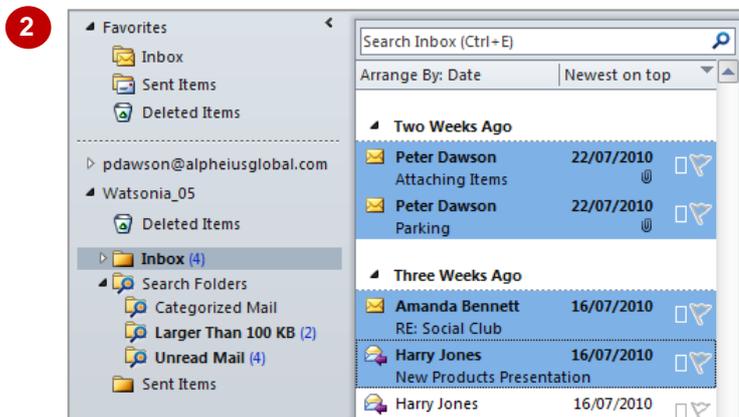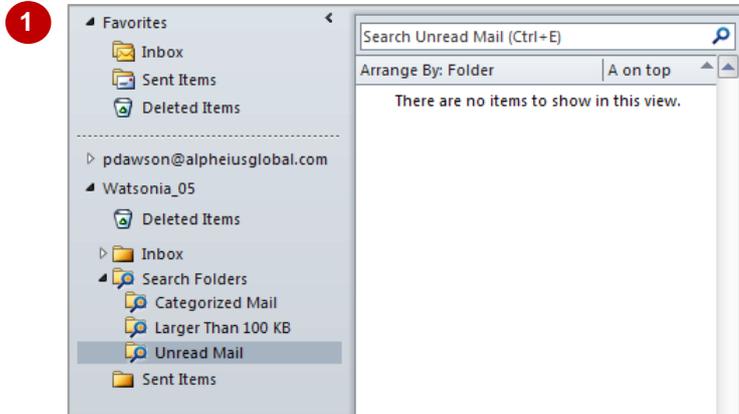
For Your Reference…

To *use* the *Unread Mail* search folder:

1. Expand ▷ *Search Folders* in the *Navigation* pane
2. Click on *Unread Mail*

Handy to Know…

- Although messages can appear in different search folders, they are stored only once in the mailbox.
- Search folders appear with a magnifying glass icon 🔍 to clearly distinguish them from other folders.

ADDING A PREDEFINED SEARCH FOLDER

To help you organise or locate certain messages, you can add predefined search folders to **Mail**. For example, you could add the search folder **Important mail** so that you can quickly and easily view messages that are marked as being of **High Importance**. You could also use a search folder to view messages from or to a specific person or group of people.

Try This Yourself:

Same File

*Continue using the previous file with this exercise, or open the file Watsonia_05.pst...*

1. Click on the **Folder** tab, then click on **New Search Folder** in the **New** group to open the **New Search Folder** dialog box

2. Scroll down to and click on **Mail with attachments** under **Organising Mail**, then click on **[OK]** to add the new search folder

   Notice that there are messages containing attachments in both the Inbox and Sent Items folders...

3. Repeat steps *1* and *2* to add the **Old mail** search folder (under **Organising Mail**)

   This folder will display messages that are older than one week

1

2
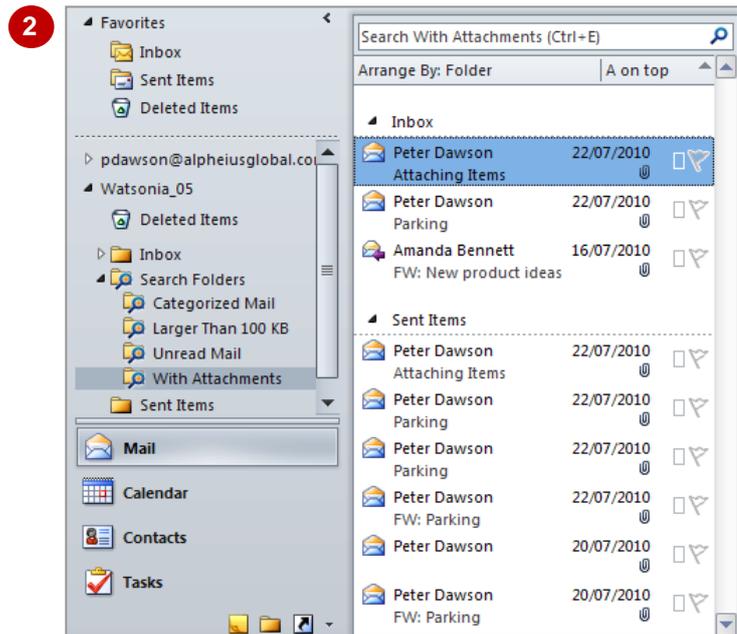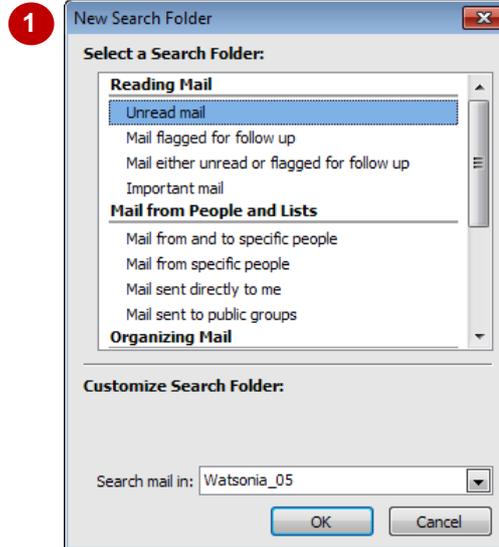
For Your Reference…

To **add** a **predefined** search folder:

1. Click on **New Search Folder** in the **New** group on the **Folder** tab
2. Click on the desired search folder
3. Click on **[OK]**

Handy to Know…

- The predefined search folders have been grouped into three groups in the **New Search Folder** dialog box: **Reading Mail**, **Mail from People and Lists** and **Organising Mail**.

CUSTOMISING PREDEFINED SEARCH FOLDERS

You can change the criteria that will be used by most predefined search folders. In this exercise you will customise the *Old mail* folder so that it will only display messages that are more than one month old. Note that you cannot change the criteria for the search folders shown under *Reading Mail* in the *New Search Folder* dialog box, such as *Unread Mail* and *Important mail*.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_05.pst...

1 Click on *Older Than One Week* under *Search Folders*, then click on *Customise This Search Folder* in the *Actions* group to open the *Customise "Older Than One Week"* dialog box

2 Type **Older Than One Month** in *Name*, then click on **[Criteria]** to open the *Old Mail* dialog box

3 Click on the drop arrow for *week(s)* and select *Month(s)*, then click on **[OK]**

4 Click on **[OK]** to close the dialog box and change the search folder

All messages that were received more than a month ago will display in the Older Than One Month search folder
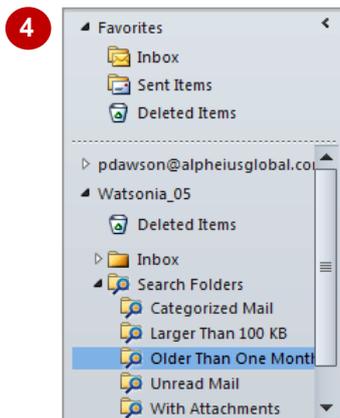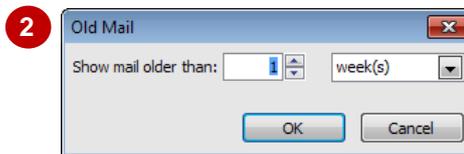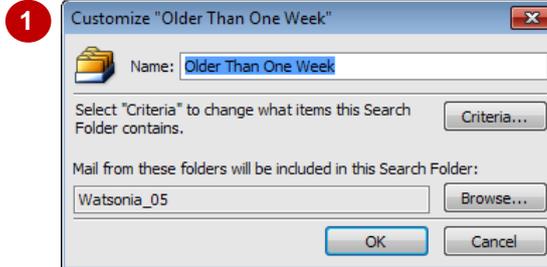
For Your Reference…

To *customise* a *predefined* search folder:

1. Right-click on the desired folder
2. Select **Customise This Search Folder**
3. Change the *Name* and *Criteria* as desired
4. Click on **[OK]** twice

Handy to Know…

- You can *delete* predefined search folders. To do this, right-click on the folder and select **Delete "folder name"**, then click on **[Yes]** to confirm the deletion. Deleting a search folder only deletes the folder, not the messages that are displayed in it.

CREATING A CUSTOM SEARCH FOLDER

Sometimes, you may find that the predefined search folders don't allow you to group messages as you wish. To overcome this you can create your own custom folders that can be structured with fairly detailed criteria. For example, you could create a search folder that will display messages from specific people, containing certain words, within a particular time span, and so on.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_05.pst...

1 Click on the **Folder** tab, then click on **New Search Folder** in the **New** group to open the **New Search Folder** dialog box
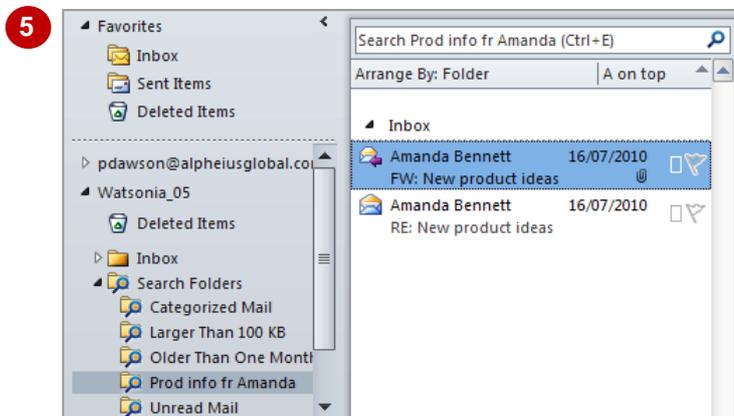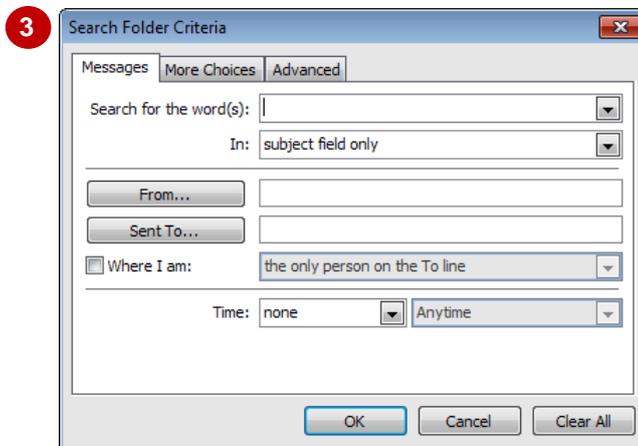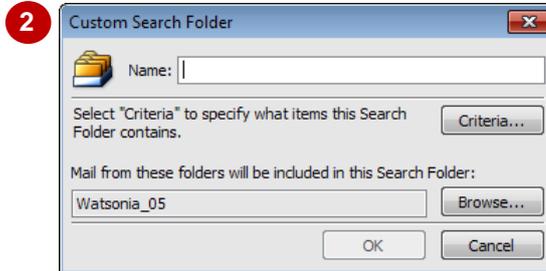
2 Scroll down to and click on **Create a custom Search Folder** under **Custom**, then click on **[Choose]** to open the **Custom Search Folder** dialog box

3 Type **Prod info fr Amanda** in **Name** and then click on **[Criteria]** to open the **Search Folder Criteria** dialog box

4 In the **Messages** tab type **product** in **Search for the word(s)**, select **subject field and message body** in **In**, and type **Amanda** in **From**

This search folder will list all messages from Amanda containing 'product' either in the Subject or body of the message…

5 Click on **[OK]** three times to add the custom search folder

2
Custom Search Folder
Name: [   ]

Select "Criteria" to specify what items this Search Folder contains.   [Criteria...]

Mail from these folders will be included in this Search Folder:

[Watsonia_05]   [Browse...]

[OK]   [Cancel]

3
Search Folder Criteria
| Messages | More Choices | Advanced |

Search for the word(s): [▼]

In: [subject field only   ▼]

[From...]   [   ]

[Sent To...]   [   ]

☐ Where I am: [the only person on the To line ▼]

Time: [none ▼] [Anytime ▼]

[OK]   [Cancel]   [Clear All]

5
⊿ Favorites
  📁 Inbox
  📁 Sent Items
  📁 Deleted Items

▷ pdawson@alpheiusglobal.co...
⊿ Watsonia_05
  📁 Deleted Items
  ▷ 📁 Inbox
  ⊿ 📁 Search Folders
    📁 Categorized Mail
    📁 Larger Than 100 KB
    📁 Older Than One Month
    📁 Prod info fr Amanda
    📁 Unread Mail

Search Prod info fr Amanda (Ctrl+E) 🔍

Arrange By: Folder | A on top

⊿ Inbox
Amanda Bennett 16/07/2010
FW: New product ideas
Amanda Bennett 16/07/2010
RE: New product ideas

For Your Reference…

To **create** a **custom** search folder:
1. Click on **New Search Folder** in the **New** group on the **Folder** tab
2. Click on **Create a custom Search Folder**
3. Click on **[Choose]**
4. Type the **Name** and enter the **Criteria**

Handy to Know…

- Search folders support prefix matching in the text strings that you specify in the **Search Folder Criteria** dialog box. For example, if you type **pen** in **Search for the word(s)**, the search folder will display messages with words like 'pendant' or 'pens', but it won't include words like 'open'.