

Organize Your Computer Files & Outlook Email Messages



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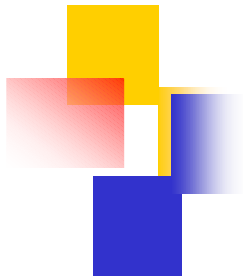
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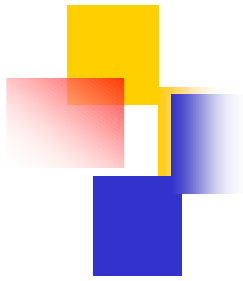
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Time-Tested Truths

- Work expands to fill the time available
- Files expand to fill the space available
- Computer files and email messages multiply much faster than paper files
 - Hard disk size has gotten much larger
 - Windows has an easy-to-use “Find” feature
 - It’s easy to send one email message to many people at the same time



Organizing Truths

- Everything needs a “home”
- If you have a place to put it, it’s easier to put it away
- If you put it away immediately, it takes only a second (if it doesn’t have a “home”, make one now)
- If you don’t put it away now, chances are you never will!



Setting Up A Computer Filing System

Easy!!

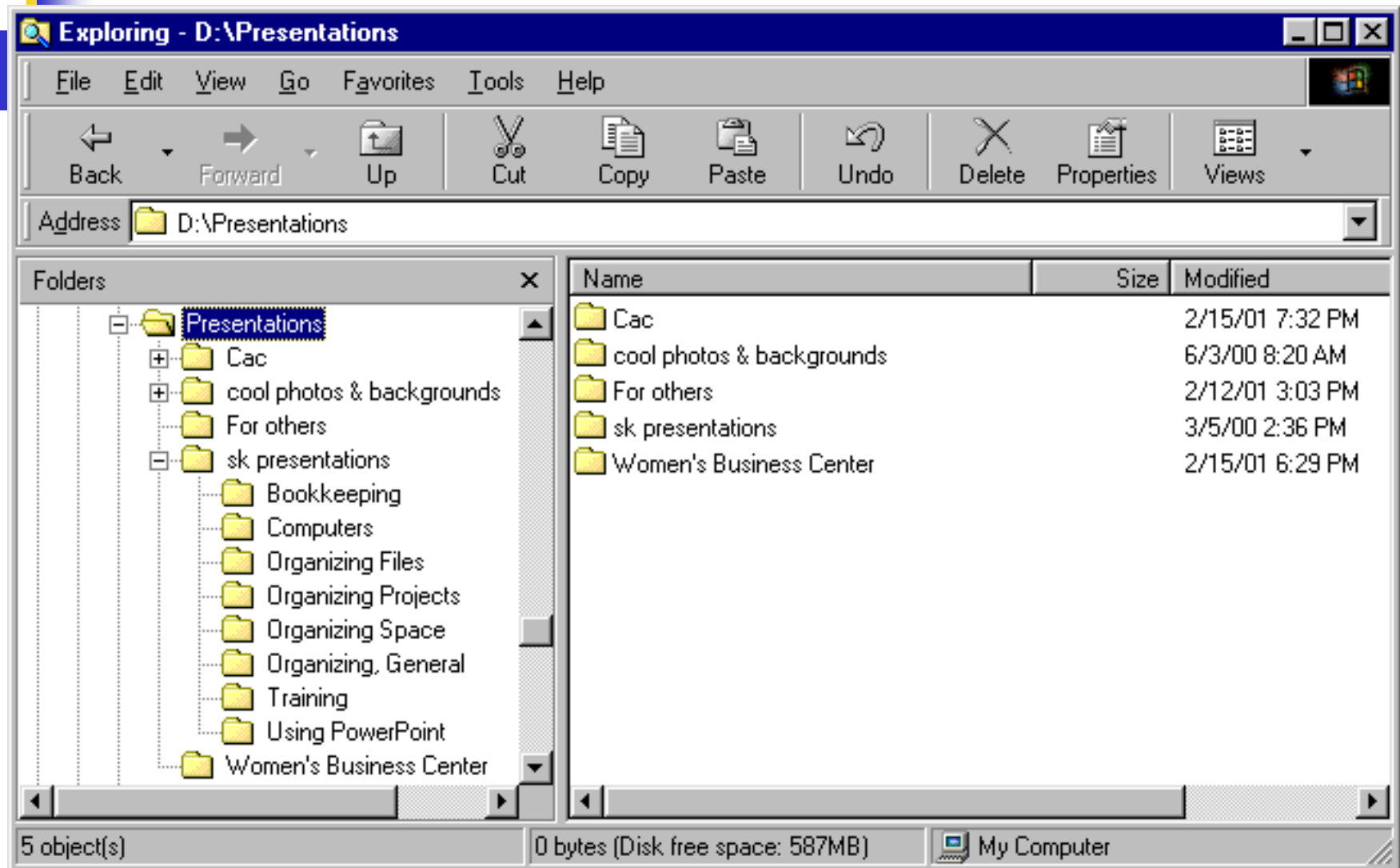
- You don't have the physical papers to handle
- Creating folders is a snap
- It's easy to select multiple files to move to a folder or to delete
- It's easy to move an entire folder
- You can see the overall file structure all at once
- You can accomplish a lot in just an hour



Where Do You Start?

- Start with current files
- Consider back up method
 - Network drive v. Drive C:
 - CD-RW, zip disk, tape backup, diskettes
- Set it up similar to your paper filing system
- File according to subject, not type of document (exceptions allowed)

An Example of an Exception – All Presentations Together



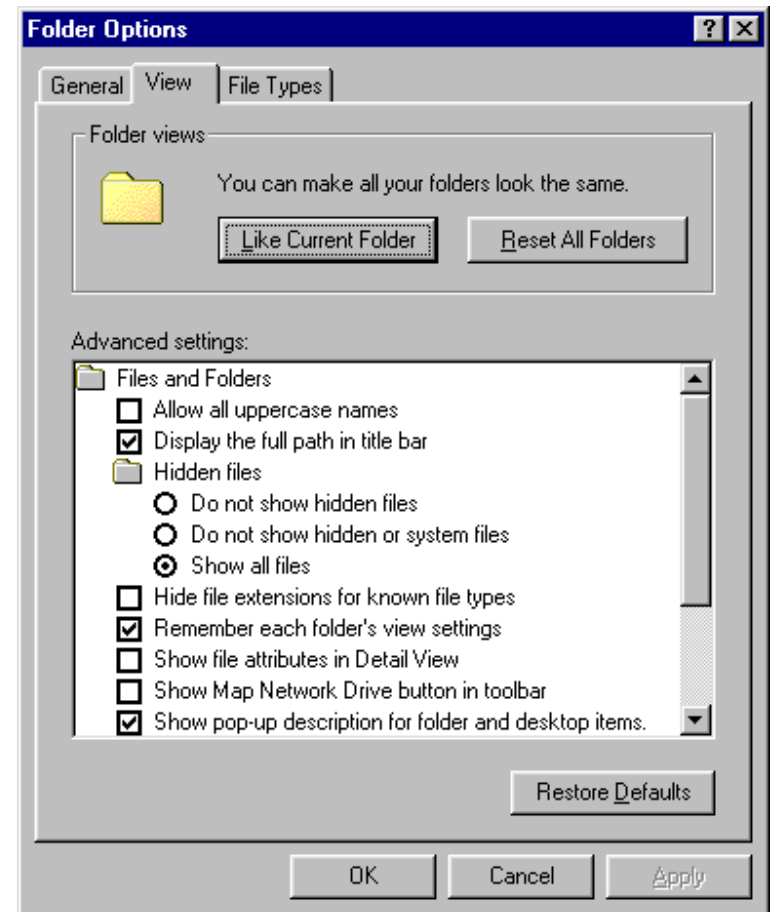


Computer Filing Tips

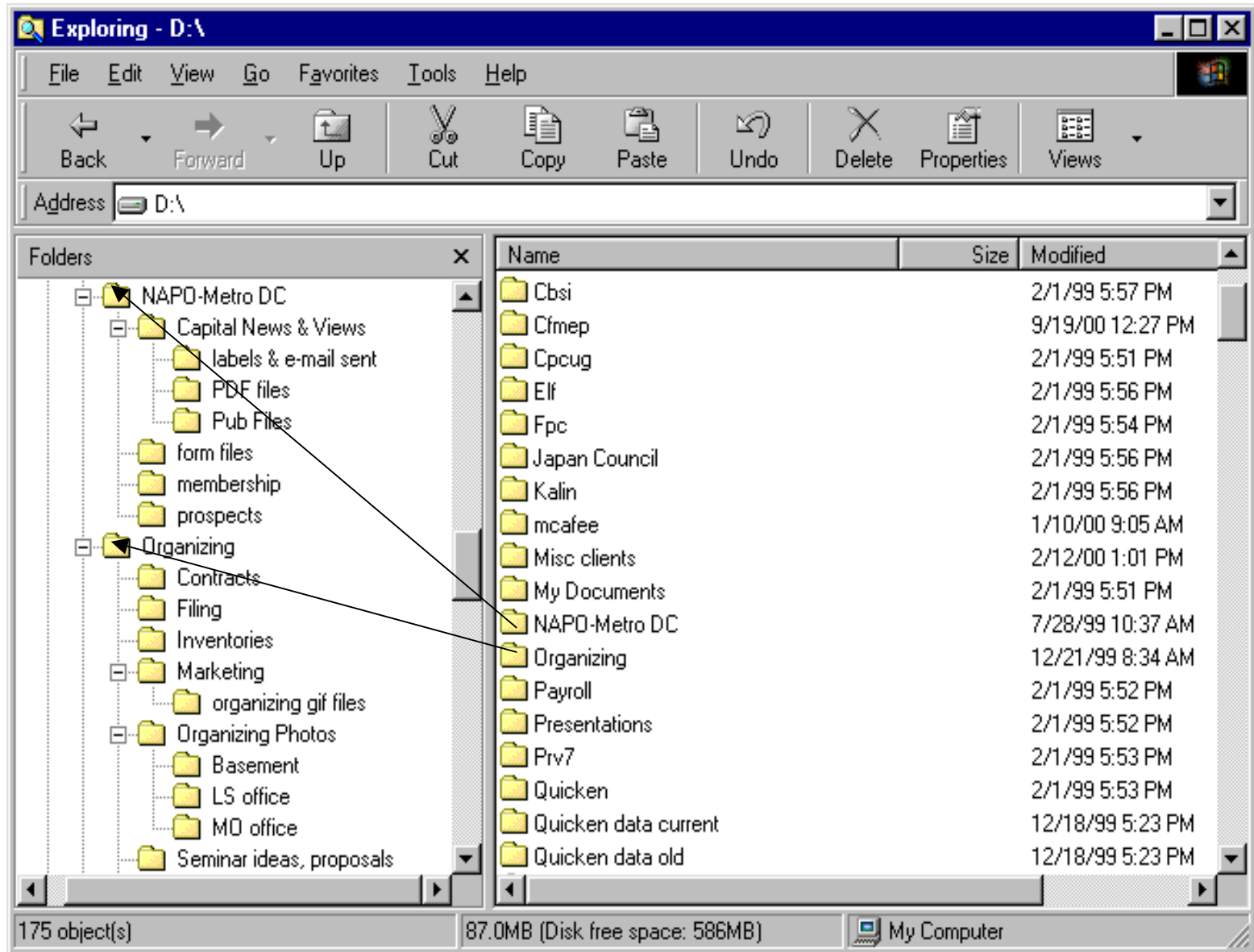
- Decide on folder/subfolder names
- Use descriptive names for folders and files
- Use C:\data as the default. Put your other folders under it
- Keep data separate from programs
- When saving a document, put it in its proper folder immediately
- If a document doesn't have an appropriate folder, make one!
- Limit the number of files in your default "save" folders

Windows Explorer Tips

- Use a shortcut to open Explorer – right click the Start button, select Explore
- Change the default settings – select the menu item View, Folder Options. On the View tab, remove the check mark on “Hide file extensions for known file types”



Folder/Subfolder Examples



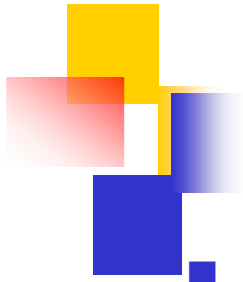
The screenshot shows a Windows Explorer window titled "Exploring - D:\". The address bar shows "D:\". The left pane shows a folder tree with "NAPD-Metro DC" selected. The right pane shows a list of files and folders with columns for Name, Size, and Modified. The status bar at the bottom indicates "175 object(s)", "87.0MB (Disk free space: 586MB)", and "My Computer".

Name	Size	Modified
Cbsi		2/1/99 5:57 PM
Cfmep		9/19/00 12:27 PM
Cpcug		2/1/99 5:51 PM
Elf		2/1/99 5:56 PM
Fpc		2/1/99 5:54 PM
Japan Council		2/1/99 5:56 PM
Kalin		2/1/99 5:56 PM
mcafee		1/10/00 9:05 AM
Misc clients		2/12/00 1:01 PM
My Documents		2/1/99 5:51 PM
NAPD-Metro DC		7/28/99 10:37 AM
Organizing		12/21/99 8:34 AM
Payroll		2/1/99 5:52 PM
Presentations		2/1/99 5:52 PM
Prv7		2/1/99 5:53 PM
Quicken		2/1/99 5:53 PM
Quicken data current		12/18/99 5:23 PM
Quicken data old		12/18/99 5:23 PM

Exercise

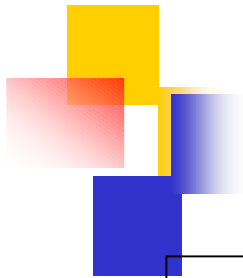
- Create your folder/subfolder structure
- Use outline or mind-mapping
- Left-brained v. right-brained





Decide Upon The Basic Structure

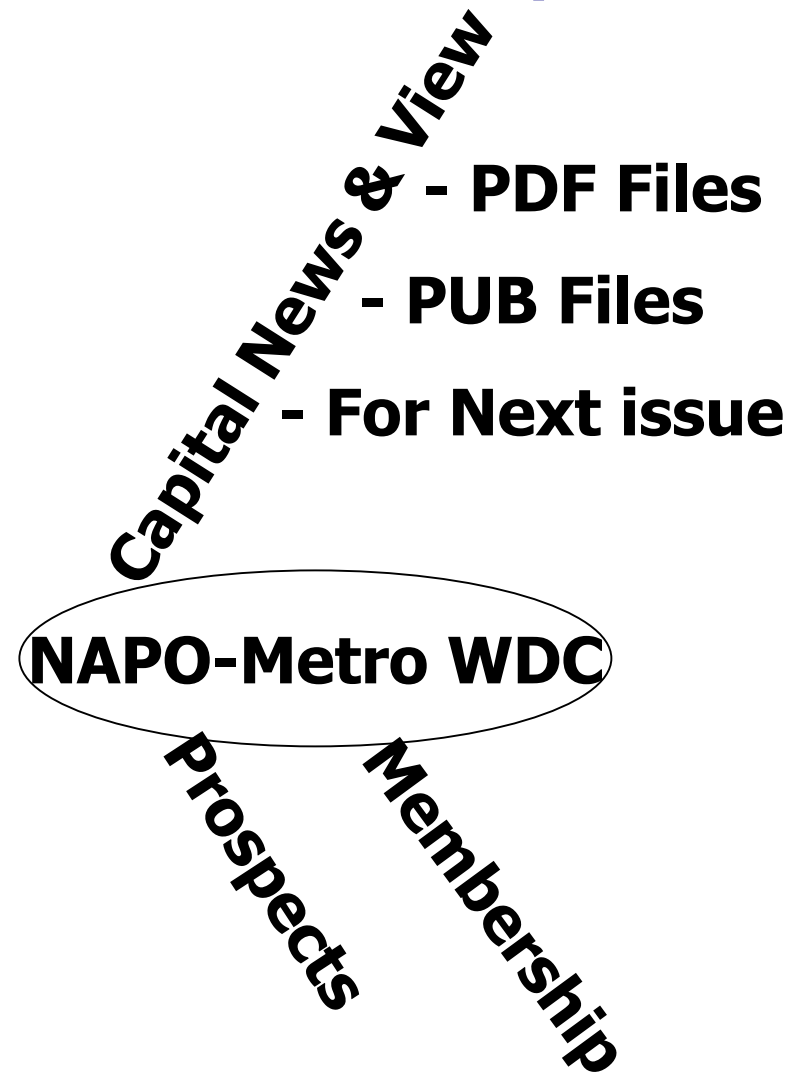
- A. Decide on your major folders
 - General business
 - NAPO
 - Clients
 - Training Manuals
 - Presentations
 - Payroll data
 - Quicken data
 - B. Decide on subfolders
 - General business
 - Marketing
 - Flyer
 - Brochure
 - Networking
 - Contracts
 - Clients
 - CAC
 - ELF
 - Training Manuals
 - WordPerfect
 - PowerPoint
 - Outlook
- Diagram description: Arrows indicate the mapping of subfolders from the major folders. An arrow points from 'General business' to the 'General business' subfolder. An arrow points from 'Clients' to the 'Clients' subfolder. An arrow points from 'Training Manuals' to the 'Training Manuals' subfolder.



Outline or Mind Map

NAPO-METRO WDC

- **Capital News & View**
- **For Next Issue**
- **Pub files**
- **PDF files**
- **Membership**
- **Prospects**





Creating Folders & Subfolders

- In Windows Explorer, select the folder under which you want the new folder
- Select File from the menu, or right click the file area on the right
- Select New, Folder and type the folder name

Create a shortcut on your Desktop to a frequently used file or folder:

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1. In Windows Explorer (not maximized), right drag the file or folder to the Desktop
2. When you release the mouse button, select "Create Shortcut Here"



Files: Drag & Drop or Cut & Paste

- Select multiple files with Shift/click or Ctrl/click
- Drag to a different folder on the left
- Or: Cut. Go to new folder. Paste

Drag to another folder on the same drive = **move**

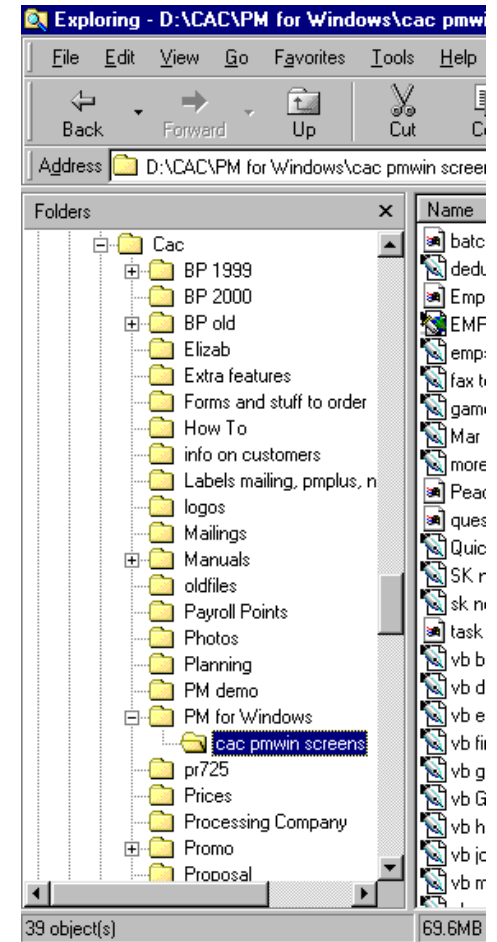
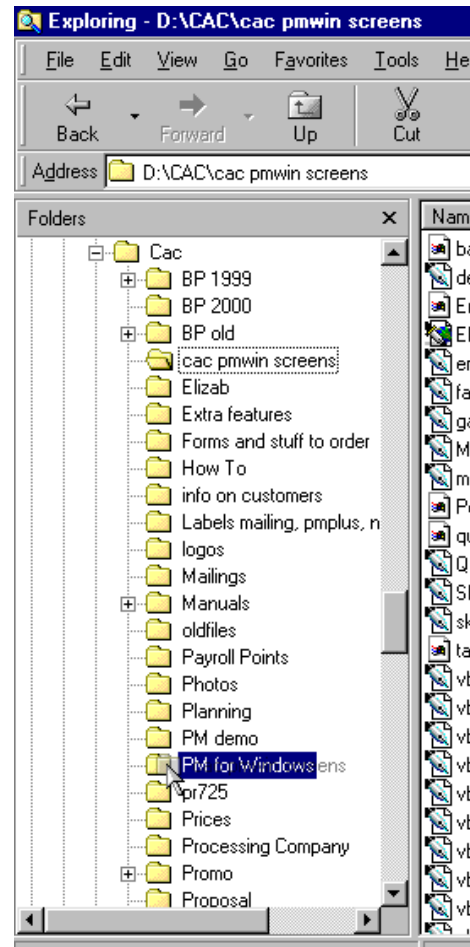
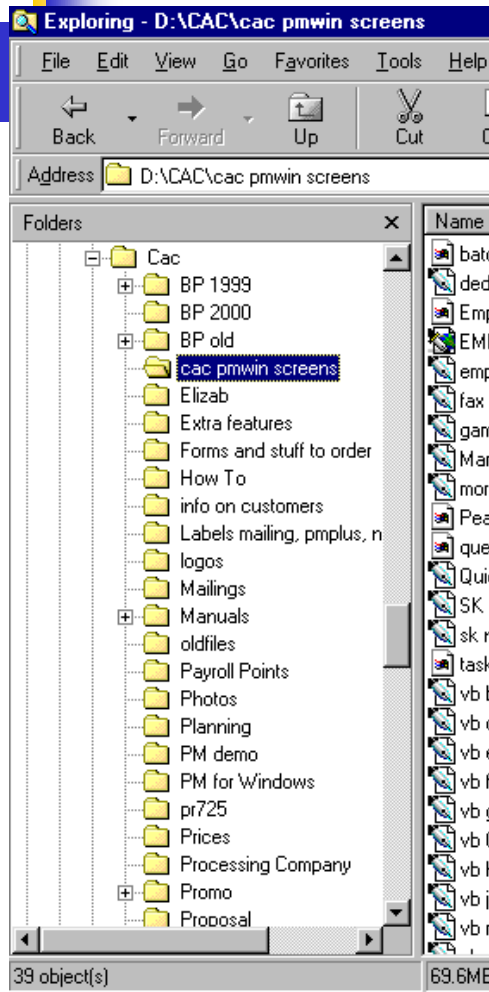
Drag to another folder on a different drive = **copy**

Right dragging gives you a choice of **move** between drives

You have **one** “undo”

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Folders: Drag & Drop or Cut & Paste



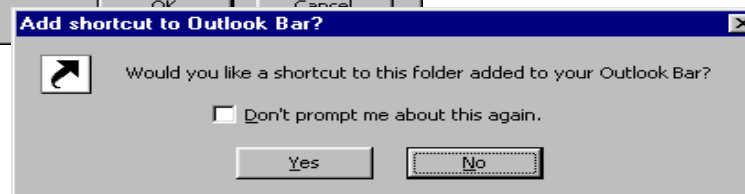
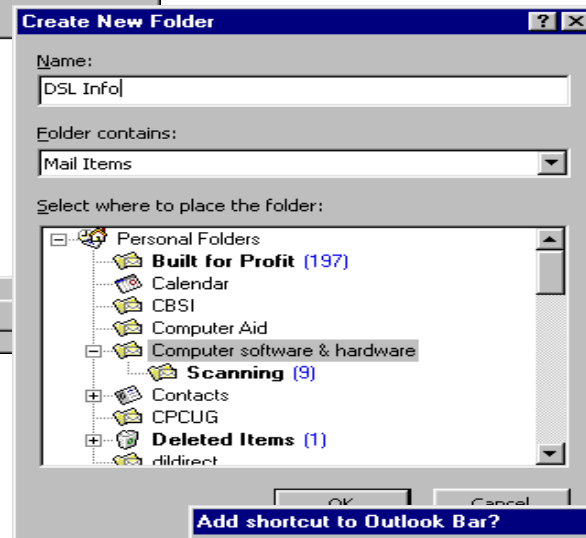
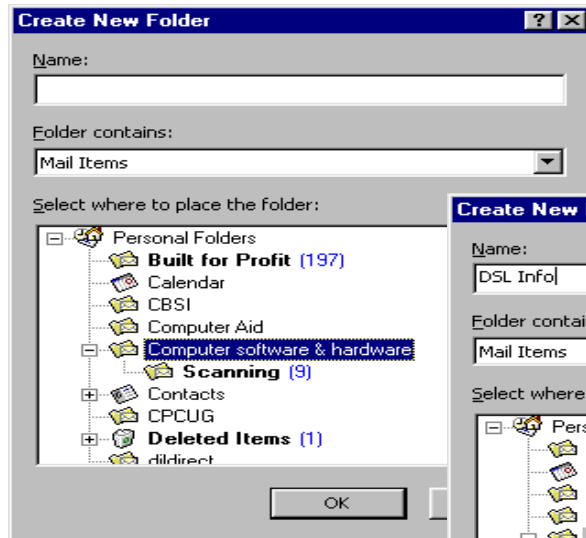


Setting Up An Email Filing System

- Create and use folders and subfolders
- Don't leave items in your in-box
- Toss what you can immediately
 - Delete button on open message toolbar
- Move to folder as you read messages
 - Move to folder button on open message toolbar
- Filter junk mail & non-critical messages
- Color-code incoming messages
- Use the "Flag" feature and set deadlines

Creating Folders & Subfolders

- Right click the folder in which you're creating the new folder
- Select New, Folder
- Type the folder name

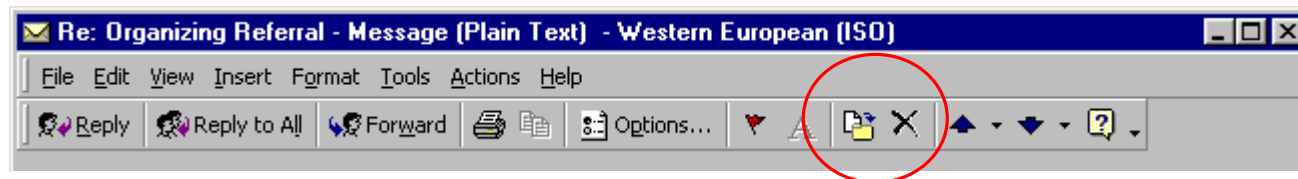


Tips for Organizing Email

- Click on "From" or "Subject" column heading to sort for easy moving to folders or deleting



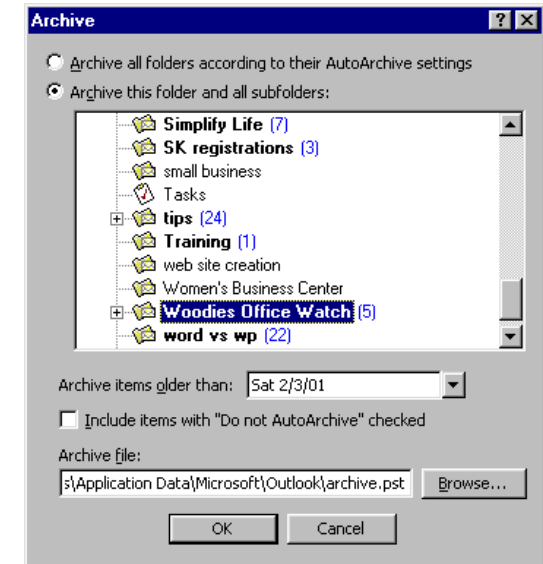
- Use Shift/click or Ctrl/click to select multiple items and drag selected items, or Cut & Paste
- As you read each message, move it to folder or delete by using icons on toolbar



- As you read a message, right click the sender's email address and "Add to Contacts"

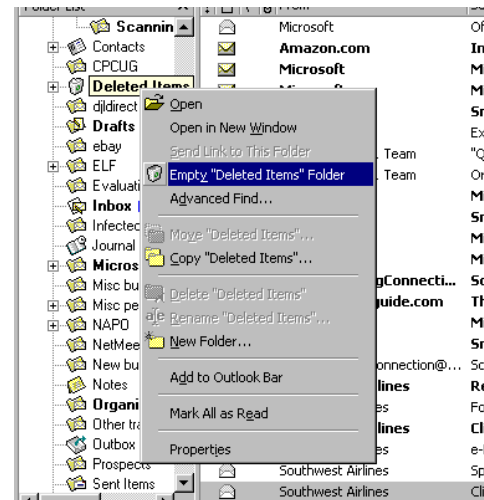
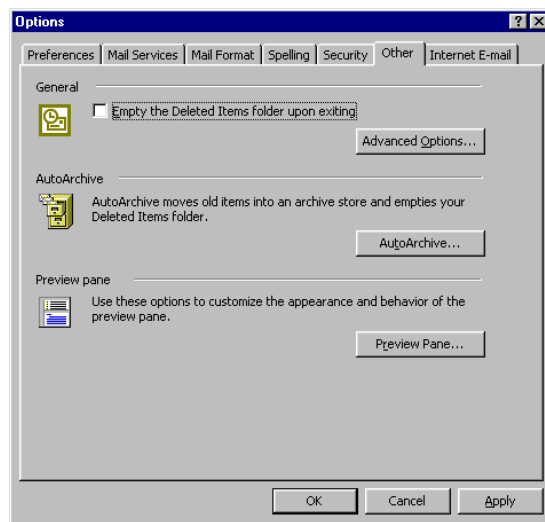
Archive & Back Up Email Messages

- Auto Archive, or
- Manual archive:
 - File, Archive (select date)
 - Notice where it stores the archive.pst file
- To display archive files:
 - File, Open, Personal Folder Files
- Back up your Outlook files
 - Outlook.pst
 - Archive.pst



Empty Deleted Items Folder

- Automatic: Tools, Options on the menu. On the "Other" tab, check "Empty the Deleted Items folder upon exiting"
- Manually: right click the Deleted Items Folder, and empty it.



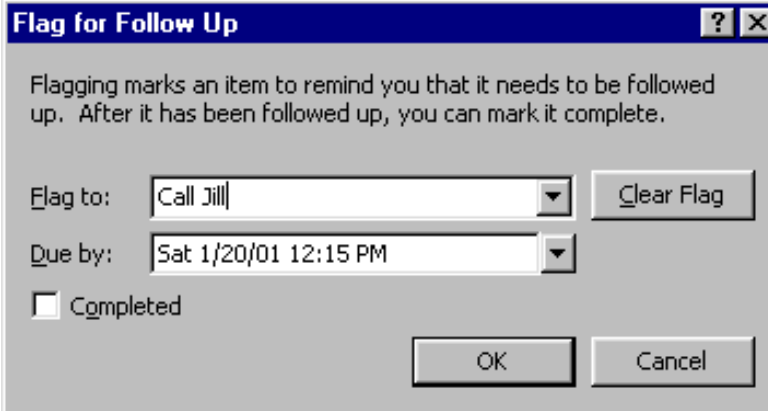


Sent Items Folder

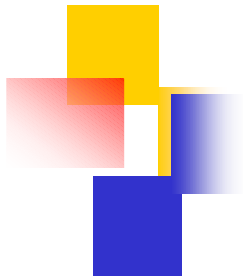
- Delete items periodically
- Sort by "To" column
 - Shift/click or Ctrl/click to select multiple items
 - Drag to other folder to save or press the "Delete" key on the keyboard to delete

Outlook's Flag Feature

- While in the message, click the Flag icon
- Or, right click on a message line in the Inbox and select Flag
- Select a reminder from the drop down list or enter your own text
- In the "Due by" field, select a date, and replace "5:00 pm" with appropriate time

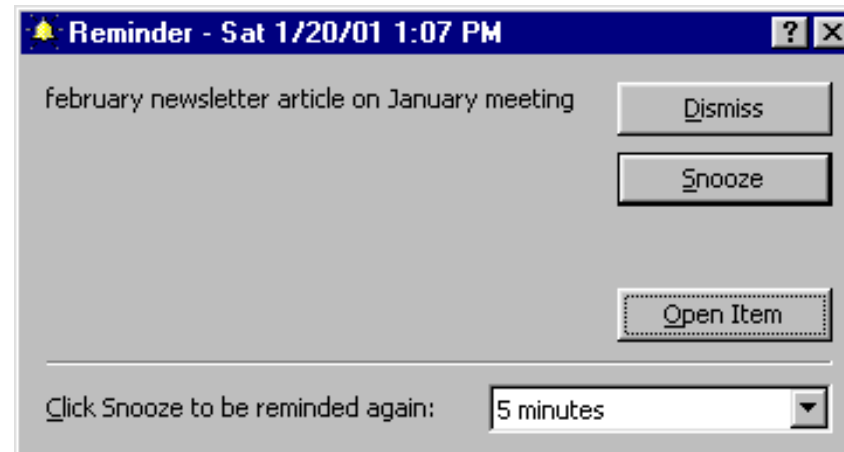


The screenshot shows the 'Flag for Follow Up' dialog box. The title bar is blue with the text 'Flag for Follow Up' and a help icon. The main area has a light gray background with the following text: 'Flagging marks an item to remind you that it needs to be followed up. After it has been followed up, you can mark it complete.' Below this, there are two dropdown menus: 'Flag to:' with the text 'Call Jill' and a 'Clear Flag' button to its right; and 'Due by:' with the text 'Sat 1/20/01 12:15 PM'. At the bottom left, there is a checkbox labeled 'Completed' which is currently unchecked. At the bottom right, there are two buttons: 'OK' and 'Cancel'.



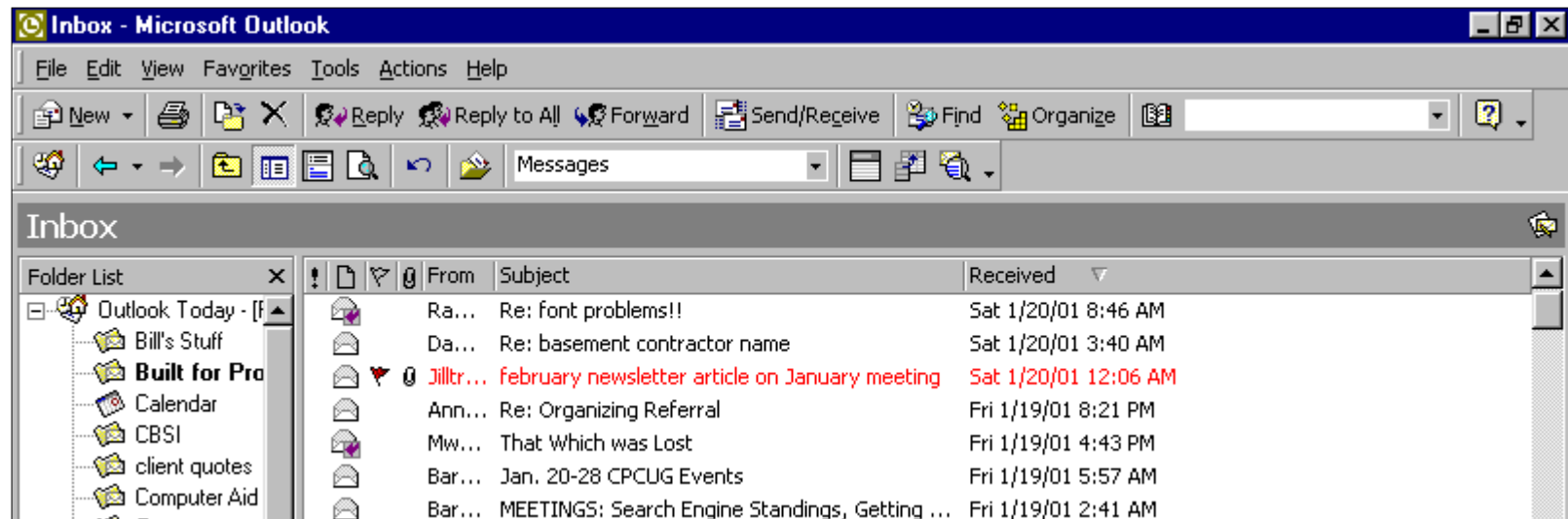
Flag Reminder Pop-Up

- Works only when Outlook is open (can be minimized)
- Displays subject line of email message rather than Follow-Up Flag text
- Gives you option to Dismiss, Snooze, or Open the Item



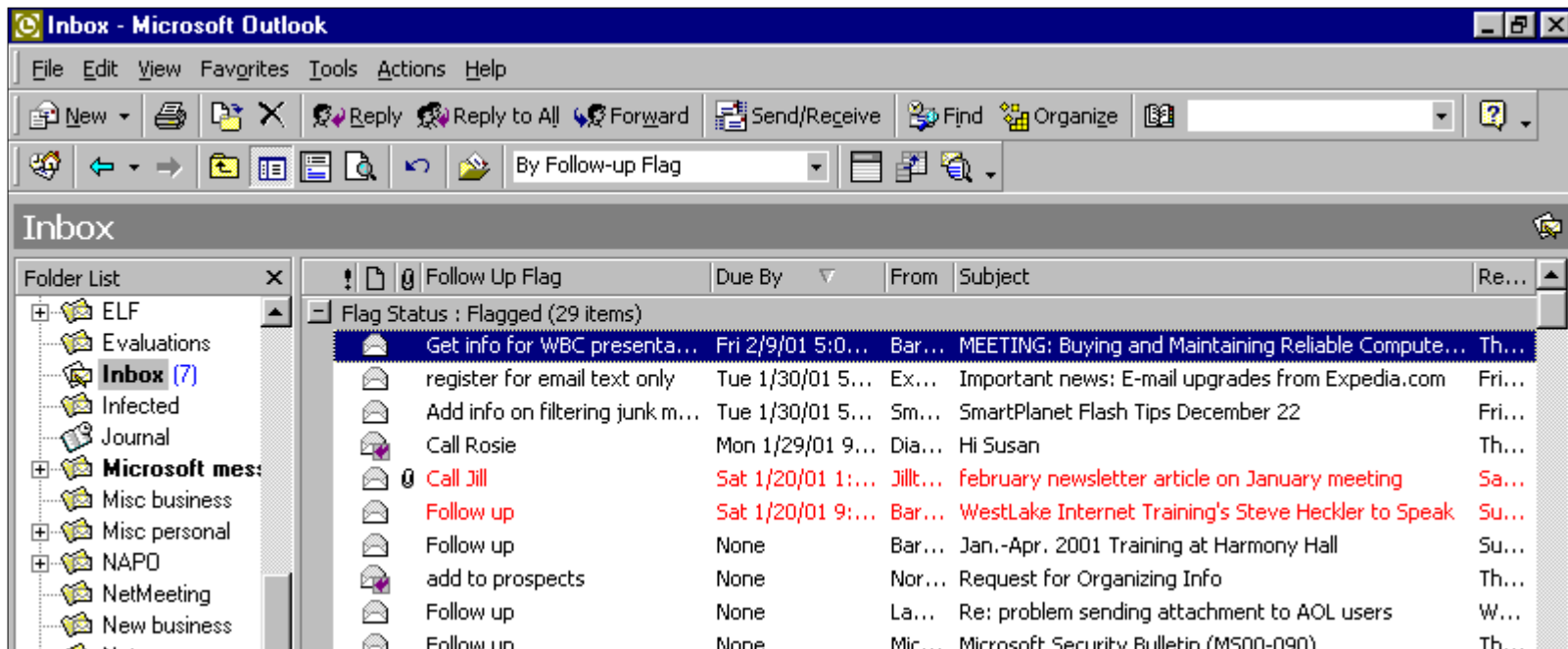
Overdue Flag Message Color Is Red

- Only after exiting and restarting Outlook or switching to another program and back



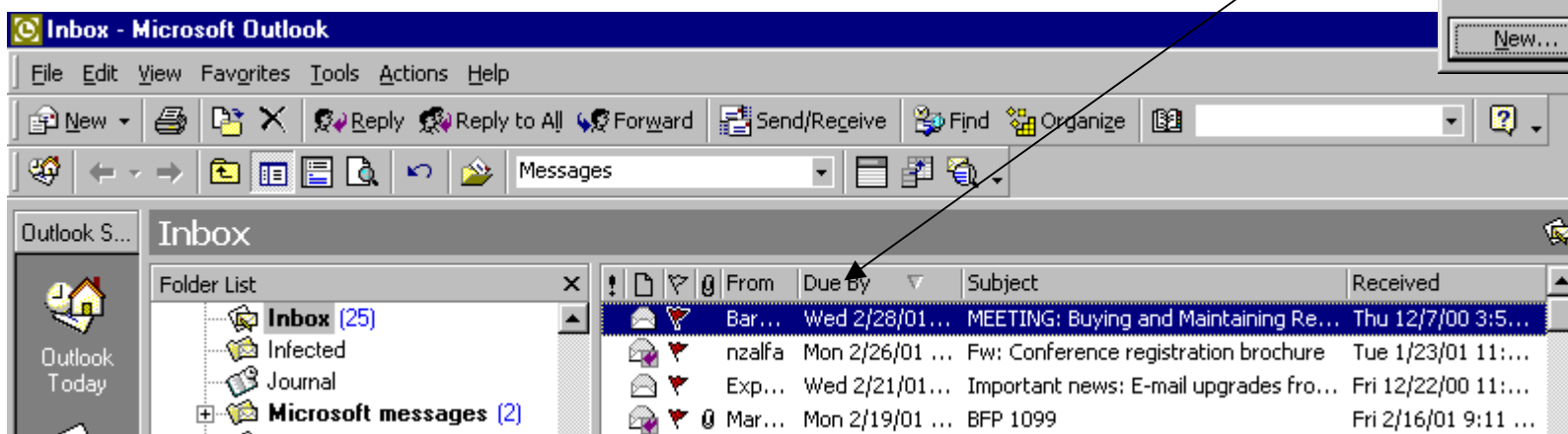
View List of Flagged Items

- From the Outlook menu, select View, Current View, by Follow-Up Flag
- Remember to set back to View, Current View, Messages!



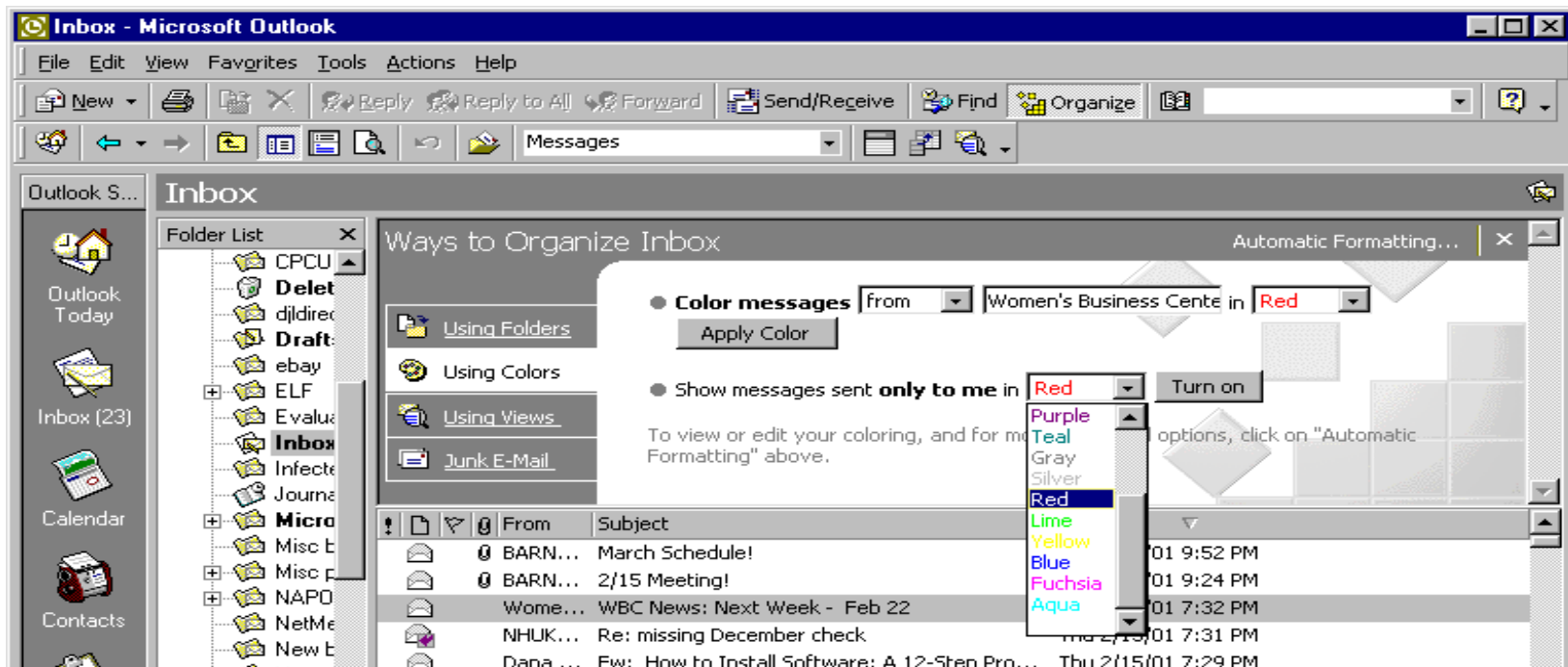
Add "Due By" and Other Fields to Outlook Inbox

- Right click any column heading and select Field Chooser
- From the drop-down list, select from among the categories of fields
- Drag the field you want to the column heading area



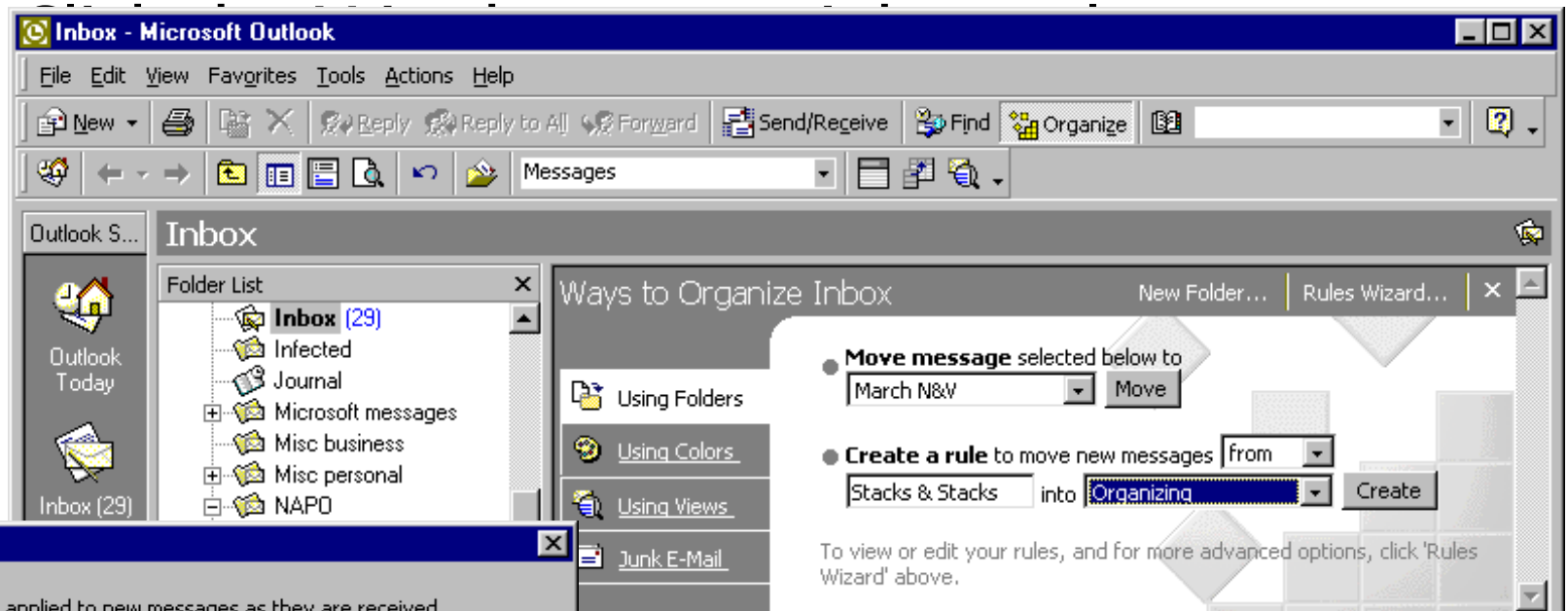
Color-Code Incoming Messages

- Select a message and click the Organize button
- Click "Using Colors"
- Apply a color from the drop down list
- Click the X in the upper right to close



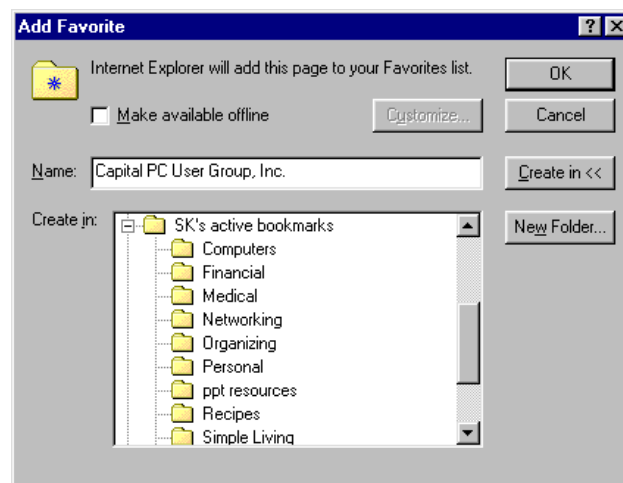
Filter Incoming Messages

- Select a message and click the Organize button
- Click "Using Folders"
- Create a rule



Organize Your Web Site Favorites

- When adding a favorite or bookmark, change the name to something you'll recognize and put it in a folder right away
- To organize Favorites later, select the menu item Favorites, Organize Favorites





Get Organized

- Make a commitment to organize your computer files and email messages
- Decide to spend 2 hours a week until they're organized
- Put it on your calendar
 - 8-9 am, Monday, Feb 19 -- organize computer files
- Send me an email message letting me know how you're doing!
 - skousek@cpcug.org