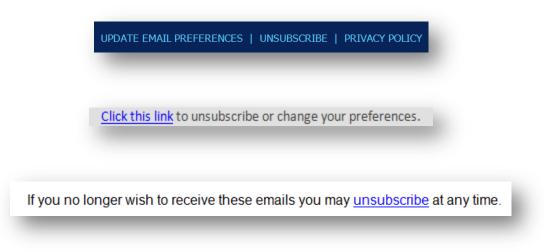
Too much email. The sheer volume is a distraction. Below is a system to reduce the volume of email received, triage the remainder, and eliminate much of the unnecessary waste associated with a full inbox. It is a system, not magic. It will require some effort. But it will be worth it. The system has two components. Though they are complements, either alone should prove useful in improving your Outlook.

REDUCE

Start in your unread folder. [*If you don't have an unread folder, instructions <u>here</u>]. Sort your unread messages by oldest first [<u>instructions</u>]. The older the email, the likelier it is that it can be deleted without consequence. Don't delete it yet. These long-ignored emails are an important source of data about your reading habits. Never-read email cluttering up your inbox should be used to reduce the amount of email that makes it to your inbox in the future.*

Unsubscribe is a method for telling a commercial sender that you are no longer interested in receiving a particular communication. Unsubscribing is an important part of reducing the volume of email you receive. Use it liberally. Look for links like these at the bottom of marketing emails:



When you do unsubscribe, you should also **purge your mailbox of similar email**. Search by the sender and then mass delete [*instructions*]. **Rules** are a more flexible, user-side version of unsubscribe. Unsubscribe creates a sender-side rule to not to send emails to you. Outlook Rules tell your mailbox what to do with defined categories of email you receive. Rules allow you to still receive routine emails without having them clutter up your inbox. For example, someone in your company may send a daily report that you only need to look at on occasion. You can create a rule to move those emails to a prescribed folder. Instructions for creating move-to-folder rules are here. Examples of email types that are amenable to rules that keep your inbox clean:

- Regular reports
- Company-wide emails
- Routine notices & confirmations (e.g., meetings, travel)
- Newsletters & updates

As with purging emails after you've unsubscribed, you will want to remove from your inbox all the emails for which you create rules. While the default is for Outlook to run rules based on new incoming or outgoing mail, you also have the option of running rules on your existing corpus of emails [*instructions*].

If your rules are being run across a large population of email, this initial organization will take the machine some time. Regardless, for folks tackling a significant accretion of email, the Reduce process can be time consuming. Rather than do it all at once, develop a new habit. I would recommend moving all old unread mail to a new folder. I would name the folder "Reduce". But call it whatever you want. Instructions on creating a new folder, moving the email to the new folder, and marking the email as read are here.

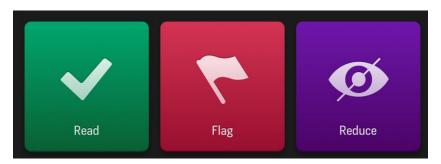
At first, I would suggest you get in a habit of going into your Reduce folder twice a day. Once before lunch and once before you leave at night (or before a meeting—whenever you can just let the machine run). Each time, go in <u>unsubscribe and</u> purge, mark as <u>Junk</u>, <u>Ignore</u>, etc. for 5 minutes or until you reach an email that calls for a <u>rule</u>. If the latter, <u>create the rule</u> and <u>run it in your mailbox</u>. Let the machine run while you are not in the office. Repeat until you run out of either type of email—i.e., candidates for (i) unsubscribe or (ii) a rule. At that point, cut

down your frequency to once a day. The first day you find the Reduce folder empty, calendar a reminder to perform a Reduce session for once a week. Maintain once a week until you are comfortable with some other interval—but do calendar the reminder for whatever interval you select.

TRIAGE

Some may find the Triage setup slightly daunting (especially pre-Outlook 2010). Get help. The setup only needs to be done once.

Further, I am going to suggest you buy something [*instructions*]. All the purchase options—a new keyboard, mouse, or app for your tablet—have the same functionality. They connect to your desktop and allow you to program a sequence of steps to a single button. These buttons will allow you to fly through your email in record time. As an example, here is the top row of a computer-connected keyboard app on my tablet:



Quick Steps are very similar to Outlook Rules. Quick Steps permit you to assign a series of steps to a single key combination (e.g., *CTRL+SHIFT+1*) [*instructions*]. These key combinations are then programmed to the keyboard, mouse, or app so that instead of having to remember *CTRL+SHIFT+1*, you just hit one button. The Quick Steps I recommend you create and program to a separate device are:

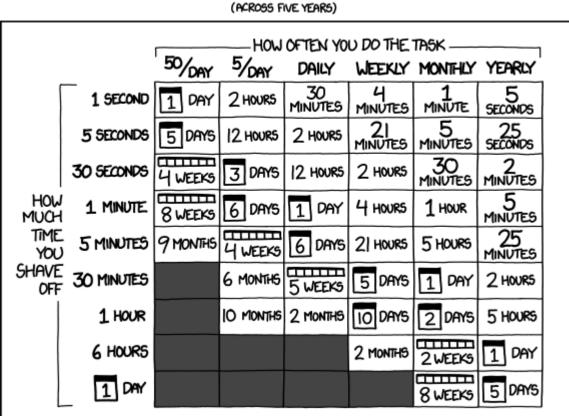
- READ: marks an email as read and moves it to a folder entitled Read
- REDUCE: marks an email as read and moves it to the Reduce folder
- FLAG: flags an email for follow-up in addition to marking it as read and moving it to the Read folder
- COMPLETE: marks a previously flagged email as complete

Though they will still be searchable, you should no longer have to deal with the READ and COMPLETE emails. The REDUCE emails you can attack on whatever <u>schedule</u> you have set for yourself. Thus, you only need to be concerned with your inbox and flagged emails. Importantly, the flagged emails can all be collected in a custom search folder [*instructions*].

Combining a commitment to <u>Reduce</u> with this <u>Triage</u> technique will result in far less email getting through and you sifting through the remaining email much quicker than you ever have.

PUTTING IT TOGETHER AND GOING BEYOND

Studies suggest that the average worker checks email 36 times per hour, sends and receives 105 emails per day, and loses more than an hour per day to email interruptions. There are major productivity gains to be had in reducing email and modifying our email habits. The productivity gains are best captured in this graphic from the incomparable <u>XKCD</u>:



HOW LONG CAN YOU WORK ON MAKING A ROUTINE TASK MORE EFFICIENT BEFORE YOU'RE SPENDING MORE TIME THAN YOU SAVE? (ACROSS FIVE YEARS)

source: XKCD

Once setup, execution of my system is simple. You will sort your email rapidly with the press of a few buttons and make regular progress in reducing the email that makes it to your inbox in the first instance. My system is bare bones by design. It is limited to two folders, four Quick Steps, and two actions, triage and reduce. The arrangement is not inviolate. Reduce and Triage are flexible techniques that you can adapt to your environment and preferences. For example, your mobile email client may militate towards having a flagged items moved to separate folder (because you can't run a search for flagged items and want all your to-do's in a single folder). You may prefer a different rapid-foldering approach, such as <u>GTD</u>. Make whatever modification you want.

Further, the system is not intended to be comprehensive. Rather, it is supposed to be a baseline approach to be built upon based on your work needs and habits. I, for example, stopped using lots of folders (except as repositories for routine

emails) once I upgraded to an Outlook version with <u>Instant Search</u>. The foldering took time, and I had so many emails in each folder that I ended up using search anyway. But there are readers who will need to maintain comprehensive folders (e.g., lawyers with specific case or client files). Such individuals can still use Triage to get through their inbox in the first instance but they have further opportunity to improve the subsequent foldering of read emails with <u>Rules</u>, <u>Search Folders</u>, <u>Conversations</u>, etc. And while I heartily recommend training to become an Outlook Ninja, I also have to warn against letting the perfect be the enemy of the good. The system outlined above will not get you to email Nirvana, but it should still take you to a much better place.

After getting in a Reduce habit and setting yourself up for Triage, if you want to learn more, I recommend exploring:

- Quick Parts
- <u>Templates</u>
- <u>Auto-Archive</u>
- <u>Rules</u>
- Search Folders
- <u>Conversations</u>
- Instant Search
- Flags

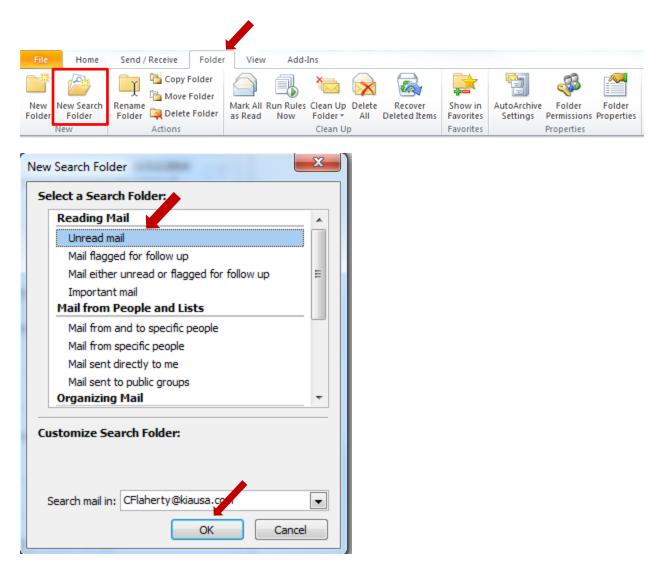
But, most of all, let me recommend trying to break the email addiction. This may be impossible. For many, it is their job to monitor for important email and react immediately. But, if you are in an environment that allows it, I heartily recommend treating email as just another project to which you allocate set amounts of time at regular intervals. When it is not email time, shut it down. Focus. Mono-task.

Add Search Folders to Favorite Folders in Outlook

(The below is Outlook 2010, for 2007 click here and for 2013 click here).

The Unread Folder

Go to the *Folder* tab and click on *New Search Folder* and select *Unread mail* from the popup menu.



You'll automatically be taken to the search folder. Select *Show in Favorites* either on the *Folder* tab or after right-clicking the folder in the Navigation Pane.

This



File Home	Send / Receive Folder View	Add-Ins		
💕 🔊	Copy Folder			🔁 🎺 🊰
New New Search Folder Folder	Customize This Rename Search Folder Folder 🙀 Delete Folder	Mark All Run Rules Clean Up Delete Recover as Read Now Folder All Deleted Item:		utoArchive Folder Folder Settings Permissions Properties
New	Actions	Clean Up	Favorites	Properties
Favorites	<			

Or

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🔎 Categori	zed Mail				
💢 Large M	ail				
🔎 Missed C	alls				
🧔 Missed 🖗	Conversations				
嫴 Tagged	[14]				
📮 Tags: To	do				
🧔 Unre					
🧔 Unre 🗎	Gpen in New Window				
📮 Unrei 📄	New Folder				
🧰 Sent Si	Rename Folder				
Tagloc	. –				
🚞 TeamF Ӵ	<u>C</u> opy Folder				
🔺 🚞 z-Corp 償	Move Folder				
🖂 Mail	Delete Folder				
	Mark All as Read				
🔢 Calendar 🐐	Clean Up <u>F</u> older				
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	Properties				

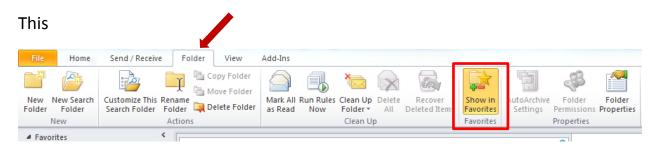
The Flagged Folder

Go to the *Folder* tab and click on *New Search Folder* and select *Mail flagged for follow up* from the popup menu.

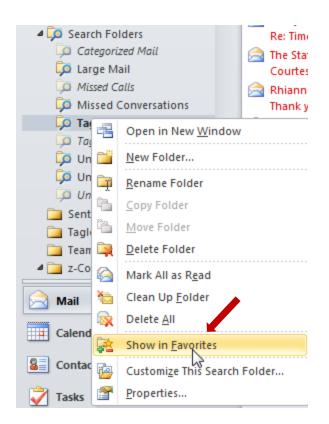
File	Home	Send / Receive Fold	r View Add-Ins	
New Folder	New Search Folder	Copy Folder Move Folder Rename Folder Polder	Mark All Run Rules Clean Up Delete as Read Now Folder All Deleted Items	Show in Favorites AutoArchive Folder Folder Folder Settings Permissions Properties
	New	Actions	Clean Up	Favorites Properties

Unread mail	
Mail flagged for follow up	
Mail either unread or flagged for follow up	E
Important mail	
Mail from People and Lists	- 11
Mail from and to specific people	
Mail from specific people	
Mail sent directly to me	
Mail sent to public groups	
Organizing Mail	-

You'll automatically be taken to the search folder. Select *Show in Favorites* either on the *Folder* tab or after right-clicking the folder in the Navigation Pane.



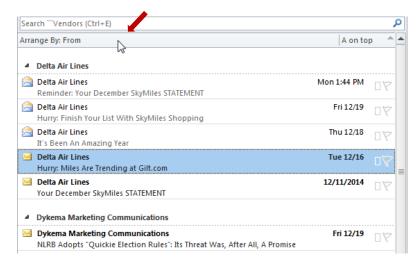
Or



Sort by Date

(The below is Outlook 2010, for <u>2007 click here</u> and for <u>2013 click here</u>. Also, video <u>here</u>).

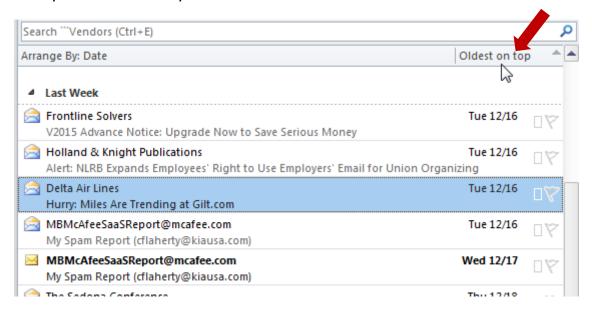
Step 1: Go to the bar above your email.



Step 2: Right-click on the left side (Arrange By) of the bar and select Date.

Search ```Vendors (Ctrl+E)		
Arrange By: Date		
The Cowen Group Your Access To Our 9th An	Erom Date	
Delta Air Lines It's Been An Amazing Year	<u>To</u> Group and sort b	by date and time.
Nuix Team One tool solves all your er	Cat <u>e</u> gories Fla <u>q</u> : Start Date	
Alert: NLRB Adopts Expedi	Flag: D <u>u</u> e Date	
The Sedona Conference Introducing The Sedona C	<u>S</u> ize Subject	ection of Privileged
MBMcAfeeSaaSReport@n My Spam Report (cflaherty	Туре	
MBMcAfeeSaaSReport@m My Spam Report (cflaherty	<u>A</u> ttachments Acc <u>o</u> unt	
Delta Air Lines Hurry: Miles Are Trending	Importance	
Alert: NLRB Expands Emple	Show as Conversations Show in Groups	il for Union Organiz
Frontline Solvers V2015 Advance Notice: Up	<u>V</u> iew Settings	ney

Step 3: Then left click on the right side of the bar so that it changes from *Newest* on top to Oldest on top"



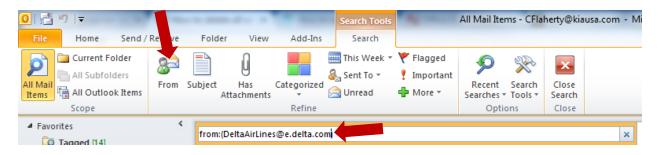
Search by Sender and Delete

(The below is Outlook 2010 and works the same in 2013, for 2007 click here)

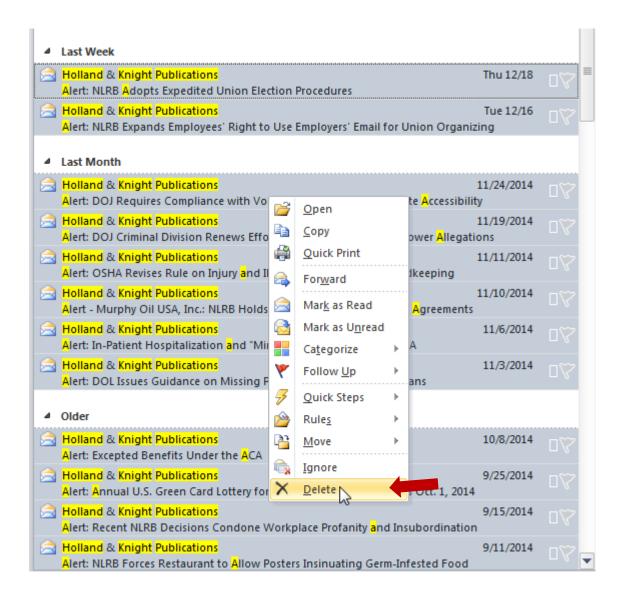
Step 1: Run a search by right-clicking on the email and going to *Find Related>Messages From This Sender*

Monday					
Delta Air Lines Reminder: Your December SkyMiles	i	<u>C</u> opy Quick Print		Mon 1:44 PM	70
 Last Week Delta Air Lines Hurny: Finish Your List With SkyMile 		<u>R</u> eply Reply <u>A</u> ll Forward		Fri 12/19	07
Delta Air Lines It's Been An Amazing Year		Mark as U <u>n</u> read		Thu 12/18	٥Ÿ
Delta Air Lines Hurry: Miles Are Trending at Gilt.coi	••••••••••••••••••••••••••••••••••••••	Ca <u>t</u> egorize Follow <u>U</u> p	+	Tue 12/16	۵Ÿ
Two Weeks Ago	Ð	<u>F</u> ind Related	•	Messages in This <u>C</u> onver	sation
Delta Air Lines Your December SkyMiles STATEMEN	7 A	Quick Steps	×	Messages from Sender	
Delta Air Lines Presenting The New Delta Experien	//////////////////////////////////////	Rule <u>s</u> <u>M</u> ove	•	12/8, 14	۵Ÿ
▲ Three Weeks Ago	N	One <u>N</u> ote <u>Ig</u> nore		12/5/2014	
Last Chance To Earn Up To 1,500 M	20	Junk	+	12,5,2014	UΥ

Alternatively, you can run a manual search in the search box:



Step 2: Delete the email by selecting it all (hit *CTRL+A*) and then pressing *DELETE*



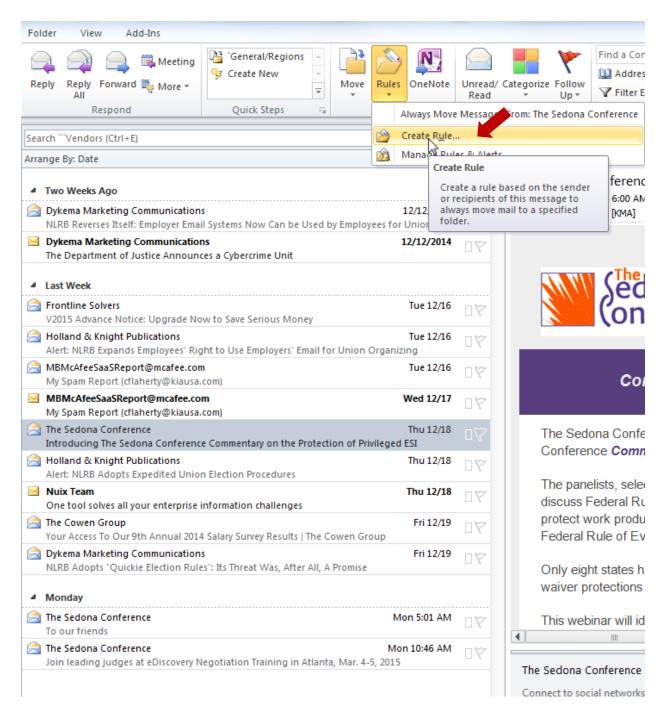
Rules

(The below is Outlook 2010. For 2013 click here, for 2007 click here)

Right-click on the email on which the rule will be based and go to *Rules>Create Rule*

from:Bistro										×		
		-	~	Deate					_		_	Bistı
Flag Status			×	Body					_			istro
Attachments		-	×	То					3			Mon
Subject			×	From		Bistro			3	× To		@ KI Baek
Arrange By: Date							Olde	st on to	op 🔺		🖂 Me	essag
4 Older												
📄 Kia <mark>Bistro</mark> [KMA	-						8/8	8/2011	$\Box \nabla$			
	kly Menu 8/8 - 8/13				Þ	<u>C</u> opy		U	_ 、			
📄 Kia <mark>Bistro</mark> [KMA	-					Quick Print		/2011	٥Ÿ			
<u> </u>	kly Menu 8/15 - 8/19					Reply		0				
Kia Bistro [KMA]					Reply All		<mark>/2011</mark>	$\Box \nabla$			
friday bbq								-				
Kia Bistro [KMA bistro menu 8/	-				2	For <u>w</u> ard		/2011	$\Box \nabla$			
Kia Bistro [KMA						Mark as U <u>n</u> rea	d	/2011				
new york steak	•					Ca <u>t</u> egorize	►	0	۵Ÿ			
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bistro menu 8-	•				-			0	۵Ÿ			
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📄 Kia <mark>Bistro</mark> (KMA]								Wanage	Rujes	CC AIL	
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📄 Kia <mark>Bistro</mark> [KMA	-				X	_ Delete		/2011	07			
bistro menu 9-	26-2011					Dente		0				

Alternatively, you can go to the *Rules* button in the *Move* section of the *Home* ribbon:

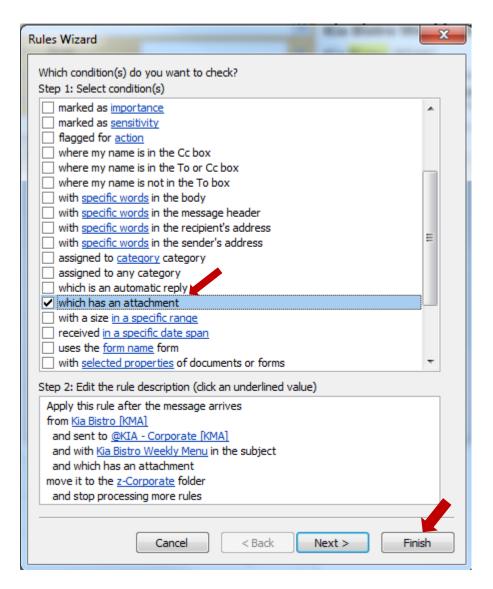


Either way, you will be given a choice of how to treat emails based on similar characteristics. For example, if you always want emails from a particular sender to be placed in a particular folder check the box *From* under the heading *When I get e-mail with all of the selected conditions*, as well as *Move the item to folder* under the heading *Do the following* (click on *Select Folder...* to select the folder to which the emails will be moved). Then click *OK*.

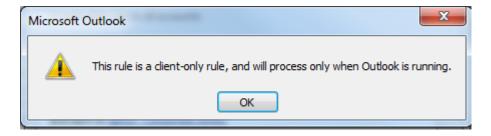
Create Rule	23
When the e-mail with all of the selected conditions	
From Kia Bistro [KMA]	
Subject contains Kia Bistro Weekly Menu 8/8 - 8/13	
Sent to @KIA - Corporate [KMA]	-
Do the following	
Display in the New Item Alert window	
Plane selected sound: Windows Notify.wav	Browse
Move the item to folder: z-Corporate Select Fo	older
OK Cancel Advance	ed Options

In certain instances, you may not want all mail from a particular sender to go to a folder. You may, for example, only want emails from that sender that have a particular subject line, are sent to a particular group, and include an attachment (a standard set of conditions for a regularly distributed report). For this Rule, however, you will need to go to *Advanced Options* to select *includes an attachment* before hitting *Finish*.

Create Rule
When I get e-mail with all of the selected conditions
🔽 From Kia Bistro [KMA]
Subject contains Kia Bistro Weekly Menu
Sent to @KIA - Corporate [KMA]
Do the following
Display in the New Item Alert window
Play a selected sound: Windows Notify.wav
Move the item to folder: z-Corporate Select Folder
OK Cancel Advanced Options



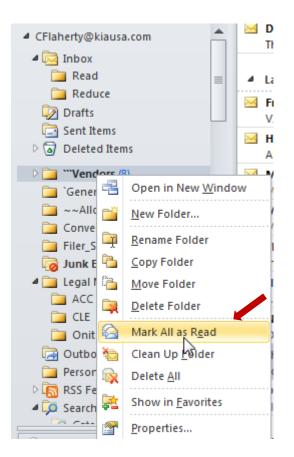
The permutations are considerable. But the functionality is simple. Most routine email has salient characteristics (conditions) that permit automatic filtering. That said, there are certain Rule conditions and actions that will result in the Rule only running when Outlook is on. When you create a "client-only" Rule, you get a message like this:



An example above might be adding *mark email as read* to the Rule created above.

Rules Wizard	×
What do you want to do with the message? Step 1: Select action(s)	
 permanently delete it forward it to people or public group forward it to people or public group as an attachment redirect it to people or public group have server reply using a specific message reply using a specific template flag message for follow up at this time dear the Message Flag dear message's categories mark it as importance print it play a sound start application 	•
mark it as read run <u>a script</u> perform <u>a custom action</u> display <u>a specific message</u> in the New Item Alert window display a Desktop Alert	-
Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from <u>Kia Bistro [KMA]</u> and sent to @KIA - Corporate [KMA]	^
and with <u>Kia Bistro Weekly Menu</u> in the subject and which has an attachment move it to the <u>z-Corporate</u> folder and mark it as read	•
Cancel < Back Next > Finis	sh

Only an email that has actually made it to your inbox can be marked as read. If you use unread email as a kind of reminder system (ill advised), adding this action will be useful. On the other hand, having Rules that run on the server even when your personal Outlook is shutdown can be great for keeping email from buzzing your mobile device when you are at home or traveling on business. Further, once you are sending emails to a prescribed folder, it is really easy to mark all of them as read by right-clicking the folder and selecting *Mark all as read*.



Run Rules

Importantly, you can run rules on your existing pile of email. Click the *Run Rules Now* button on the *Folder* tab or go to the *Rules* button in the *Move* section of the *Home* ribbon and select *Manage Rules & Alerts* and click on *Run Rules Now* in the pop up menu.



or





File Hor	me Send / Receive	Folder View	Add-Ins Se	arch		
New New E-mail Items *	lignore ightarrow Clean Up → Clean Up → Delete ightarrow Junk →	Reply Reply For All	nward 👼 More 🛪	General/Regions	Move	OneNote Unread/ Categorize Follow Read
New	Delete	Resp	ond	Quick Steps 🛛 🖓	<u> </u>	Create R <u>u</u> le
 Favorites Tagged 	< [14]	from:Bistro				Manage Rules & Alerts Bistro Wee
🗟 Inbox		Flag Status		Body		Manage Rules & Alerts
📴 Sent Ite	ms	Attachments		💌 🗶 То		Manage rules and alerts.
📮 Unread	(3)	Subject		× From	Bistro	Rules make it possible to
Deleted Items		Arrange By: Date				Oldesi automatically take action based on the contents of a message.
CFlaherty@kiausa.com Inbox		⊿ Older				
Drafts	=	Kia <mark>Bistro</mark> [KMA] Kia Bistro Weel	l] kly Menu 8/8 - 8/13			8/8/2011 □♡

Rules and Alerts	territe Manufacture of the	×
E-mail Rules Manage Alerts		
🖄 New Rule Change Rule 🗸 🗎 Copy 🗙 Delete 🔺 💌	<u>R</u> un Rules Now <u>O</u> ptions	
Rule (applied in the order shown)	Actions	•
Kia Bistro [KMA] (dient-only)	-	*
StoredIQ	P3	
ADELMAN TRAVEL GROUP		*
Gogo	P3	
Corporate Counsel	P3	
Dykema Marketing Communications		
✓ MBMcAfeeSaaSReport@mcafeesaas.com	P3	-
Rule description (click an underlined value to edit):		
Apply this rule after the message arrives		A
from <u>Kia Bistro [KMA]</u>		
and sent to <u>@KIA - Corporate [KMA]</u>		E
and with <u>Kia Bistro Weekly Menu</u> in the subject and which has an attachment		
move it to the z-Corporate folder		
and mark it as read		-
Enable rules on all messages downloaded from RSS Feeds		
	OK Cancel	Apply

Check the box adjacent to the rule(s) you want run and hit Run Now.

Run Rules Now	×
Select cles to run: Kia Bistro [KMA] StoredIQ ADELMAN TRAVEL GROUP Gogo Corporate Counsel	•
Select All Unselect All Rule Description	
Apply to message from "Kia Bistro [KMA]" and sent to "@KIA - Corporate [KMA]" and with "Kia Bistro Weekly Menu" in the subject and which has an attachment	
Run in Folder: All Mail Items Bro	wse
Apply rules to: All Messages Run Now C	▼ lose

Some additional resources on rules:

Outlook 2010 Tutorial - Creating a Message Rule (Video)

Manage messages by using rules

The Three Most Important Outlook Rules for Processing Mail

Create the best rules in Outlook to boost your productivity

Create a new folder and move unread mail

(The below is Outlook 2010. For 2013 click here, for 2007 click here)

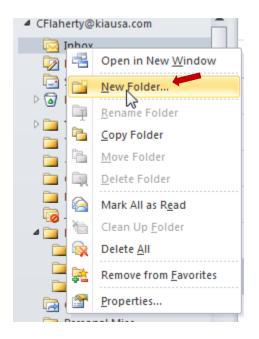
CREATE FOLDER

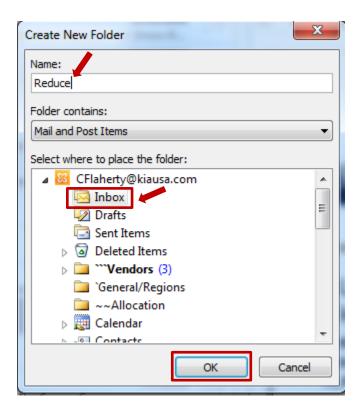
Method 1: Go to the *Folder* tab, click on *New Folder*, name it, and select the folder location.

쿱키=			***Vendors - CFlaher	ty@kiausa.com - Microsoft Outle
File Home Send / Receive Folder	View Add-Ins			
New Search Folder New New Search Folder New Search Folder Actions	Mark All Run Rules Clean Up Del as Read Now Folder * A Clean Up	I Deleted Items	Show in Favorites Favorites	
Create New Folder	×			
Name:				
Reduce				
Folder contains:				
Mail and Post Items	-			
Plair and Post Items				
Select where to place the folder:				
CFlaherty@kiausa.com	*			
Drafts	E			
Sent Items				
Deleted Items				
Vendors (3)				
`General/Regions				
~~Allocation				
Calendar				
N - 101 Contacts	•			
	Cancel			
		-		

CFlaherty@kiausa.com
 Inbox
 Reduce

Method 2: Right-click on the folder location in the Navigation Pane, select *New Folder*, click on *New Folder*, name it, select the folder location, and name the new folder.

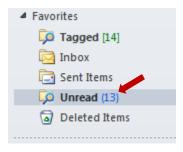


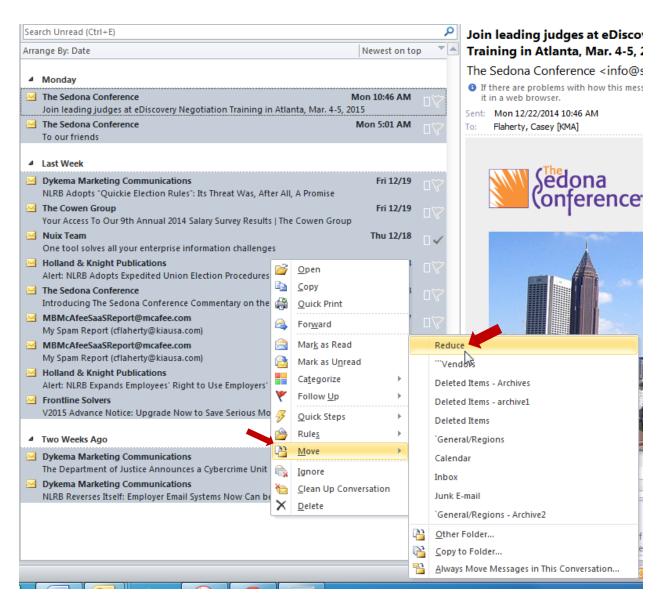




MOVE UNREAD EMAIL TO NEW FOLDER

Go to the Unread search folder [*instructions*]. Select all unread email by hitting *CTRL+A*. You can drag and drop the files to your new folder. Or you can right-click, select *Move>Other Folder*, and then select the folder you just created (which should be one of the quick options).





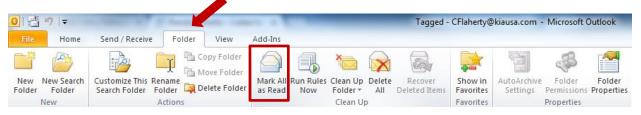
MARK EMAIL IN FOLDER AS READ

Method 1: Go to the new folder. Use the *Mark All as Read* button on the *Folder Ribbon*

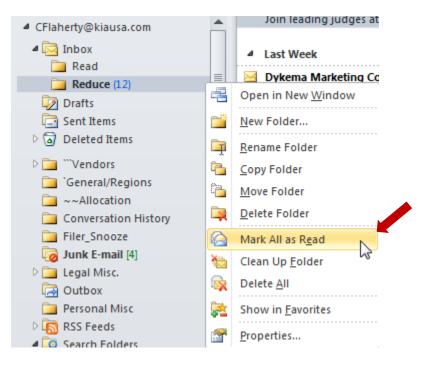
Method 2: Right-click on the folder in the Navigation Pane and select *Mark All as Read*

Method 3: Go to the new folder. Select all the email by hitting *CTRL+A*. Mark it read by hitting *CTRL+Q*

Method 4: Go to the new folder. Select all the email by hitting *CTRL+A*, right-click and select *Mark as Read*.



OR



OR

rrange By: Date			Newest on to	p `
4 Monday				
The Sedona Conference		N	lon 10:46 AM	пV
Join leading judges at eDiscovery Negotiation Train	1	<u>O</u> pen		- v
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	_	<u> </u>		
Last Week	2	For <u>w</u> ard	.	
Dykema Marketing Communications		Mark as Read	12/19	
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The Cowen Group Your Access To Our Oth Appund 2014 Salary Suprey B		Categorize	12/19	
Your Access To Our 9th Annual 2014 Salary Survey R Nuix Team			12/10	
 One tool solves all your enterprise information chail 	7	Follow <u>U</u> p	▶ 12/18	~
Holland & Knight Publications	5	Quick Steps	12/18	
Alert: NLRB Adopts Expedited Union Election Proce		Rules)	
The Sedona Conference		Move	▶ 12/18	
Introducing The Sedona Conference Commentary o		imove		
MBMcAfeeSaaSReport@mcafee.com	1	Ignore	12/17	
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MBMcAfeeSaaSReport@mcafee.com	X	Delete	12/16	
My Spam Report (cflaherty@kiausa.com)	-		_	
Holland & Knight Publications			Tue 12/16	
Alert: NLRB Expands Employees' Right to Use Emplo	yers'	Email for Union Orgai	nizing	
Frontline Solvers			Tue 12/16	
V2015 Advance Notice: Upgrade Now to Save Serio	us Mo	ney		
Two Weeks Ago				
Dykema Marketing Communications			12/12/2014	
The Department of Justice Announces a Cybercrime	Unit			
Dykema Marketing Communications			12/12/2014	

Triage Purchase

I recommend you purchase a device that enables you to add additional keys to your computer setup so that those keys can be programmed to execute a series of steps with one click. If you find this intimidating, get help. Call in the IT person or the individual on your team who takes pride in their tech savvy. The setup only needs to be done once.

Many of the device options are designed for gaming. Gamers program the extra keys to execute a series of actions at the press of a single key. "Macro" and "hot keys" are semi-familiar terms that may shed light on the objective. But an example might be highlighting a term or phrase in something you are reading on screen and then pressing a button that (i) copies it, (ii) opens your web browser, (iii) goes to a specific research site (e.g., Google, Wikipedia, FindLaw, GPO, etc.), (iv) pastes the text into the search bar, and (v) executes the search. In our context, a single button press will, for example, (a) mark an email as read, (b) flag it for follow up, and (c) move it to a prescribed folder.

The first option is an entirely new keyboard that has extra, programmable keys. The keyboard with programmable keys I've used is <u>here</u> with other options <u>here</u> and <u>here</u>. You can see the additional, built-in keypad in the picture below:



Very similar is a separate, programmable mini keypad. The keypad I've used is <u>here</u>, and other options are <u>here</u> and <u>here</u>.



Because there are not many keys, a user should learn them pretty quickly. But you can create a legend, use <u>inexpensive stickers</u>, <u>print custom stickers</u>, or even have <u>custom keycaps made professionally</u>. Labels are also very easy to create if you decide to use an app on a tablet. The app I've used is <u>here</u> with an alternative <u>here</u>. And here is an example of what the tablet interface can look like when the app is open:



The app is probably the easiest to use at the outset. In the long run, a keyboard is probably more of a time saver because it is always there, always on, and faster in terms of both input and response. Another physical option with which I've only had limited success is a programmable mouse. Same concept. Personally, the buttons were just too small for me to achieve speed or accuracy (though they work great for other things, like switching applications). The mouse I've used is <u>here</u> with other options <u>here</u> and <u>here</u>.

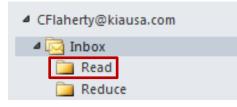


Finally, if you are comfortable with scripting, it is fairly easy to use something like <u>AutoHotKey</u> to remap the number pad (including an on/off command) to achieve the same goal.

Quick Steps

(The below is Outlook 2010. For <u>2013 click here</u>. Unfortunately, Quick Steps doesn't exist in Outlook 2007 and before. You can achieve the same functionality but it involves writing <u>macros</u>. Since I do not have Outlook 2007, I have not created a guide for doing this.)

Before creating your first Quick Step, you will want to create a new folder for processed email. Name it whatever you want; I would recommend "Read" or "Processed". <u>Again, instructions for creating a new folder are here</u>.



The Quick Steps you will be creating are:

- <u>READ</u>
- <u>REDUCE</u>
- <u>FLAG</u>
- <u>COMPLETE</u>

Program each of the associated shortcut keys to whatever <u>external</u> <u>programmable device</u> you decide to try.

READ

The first Quick Step will be mark email as read and move the email from the Inbox to the Read folder.

Step 1: Click on *Create New* in the *Quick Steps* menu on the *Home* ribbon.

01391-	11 - and - And	an March & State of		Inbox - CFlaherty@kiausa.c	om - Micr <mark>os</mark> oft Outlook		· · · · · · · · · · · · · · · · · · ·
File Hor	ne Send / Receive	Folder View Add-Ins					
	🚔 Ignore 🛛 🗙	A Meeting	General/Regions	📑 🖧 💦	📄 📕 🎔	Find a Contact 👻	28.2 5
	Clean Up 🔹 🥂		🈼 Create New 👻			Address Book	T X
New New E-mail Items *	🍇 Junk ≠ Delete	Reply Reply Forward 🌉 More 🛪 All	7	Move Rules OneNote	Unread/ Categorize Follow Read VD V	🛛 Filter E-mail 🔹	SCOPIA Settings Meeting
New	Delete	Respond	Quick Steps 🛛 🖓	Move	Tags	Find	SCOPIA Desktop

Step 2: Name the Quick Step "Read".

Edit Quick Step	? ×
Read Name:	
Add actions below that will be performed when this quick step is clicked on.	
Actions	

Step 3: Select *Mark as Read* from the *Choose an Action* dropdown menu.

Edit	Quic	k Step	?	x
	Add ac	Name: Read tions below that will be performed when this quick step is clicked on. s		
	M	ark as read	•	×
-	Filir	lg	-	
	<u></u>	Move to folder		
	P	Copy to folder		
	×	Delete message		
	\times	Permanently delete message		
	Cha	nge Status		
		Mark as read		
		Mark as unread	Ε	
	2	Set importance		
	Cat	egories, Tasks and Flags		
		Categorize message		
		Clear Categories		
	٣	Flag Message		
S	٣	Clear flags on message		
⁻	\checkmark	Mark complete		
	2	Create a task with attachment		
	2	Create a task with text of message		ncel
. cor	Res	pond		
	P	New Message		
	2	Forward		
	2	Reply	Ŧ	works to

Step 4: Click on Add Action

ſ	Edit Quick Step 🛛 😵 🔀
	Name: Read
	Add actions below that will be performed when this quick step is clicked on. Actions
	Aark as read
	Add Action

Step 5: Select *Move to Folder* from the *Choose an Action* dropdown menu.

Edit Quick Step	x
Name: Read	
Add actions below that will be performed when this quick step is clicked on. Actions	
Mark as read	×
Choose an Action	×
Choose an Action	<u> </u>
Move to filder	
Copy to folder	
X Delete message	=
× Permanently delete message	
Change Status	
? Set importance	
Categories, Tasks and Flags	
Categorize message	
d Elear Categories	
s 🚩 Flag Message	
I 🚩 Clear flags on message	
✓ Mark complete	
Create a task with attachment	- ncel

Step 6: Select the Read folder.

Edit Quick Step	
Re	ame: ead below that will be performed when this quick step is clicked on.
Actions -	
🚔 Mark as	read 💌 🗙
A Move to	o folder 💌 🗙
C	Choose folder
	Choose folder
Add 🚞	Read
	`General/Region®
	Reduce
	```Vendors
	Deleted Items - Archives
	Deleted Items - archive1
	Deleted Items
Optiona	Inbox
Shortcu	Junk E-mail
Tooltip	Other Folder
	Always ask for folder
	Finish Cancel

**Step 7**: Now go to the bottom of the menu to *Choose a shortcut*. Any of the shortcuts will do. I recommend *CTRL+SHIFT+1*.

Edit Quick Step	<i>P</i>	? ×
Name:           Read           Add actions below that will be performed	d when this quick step	is clicked on.
Actions		
🚔 Mark as read		• ×
Move to folder		• ×
🔁 Read		•
Add Action		
Optional		
Shortcut key: CTRL+SHIFT+1 💌		
Tooltip text: Choose a shortcut	hen are mouse hovers	over the quick step.
CTRL+SHIFT+1		
CTRL+SHIFT+2		
CTRL+SHIFT+3		Finish Cancel
CTRL+SHIFT+4		
CTRL+SHIFT+5 CTRL+SHIFT+6		
CTRL+SHIFT+6 CTRL+SHIFT+7	5:40 PM	
- CONFIDENTIAL CTRL+SHIFT+8		The Ecology Center
CTRL+SHIFT+9	4:23 PM □♡	Connect to social networks to sl

Step 8: Press Finish.

Edit Quick Step		Second in	? ×
Rea			
Add actions be	low that will be performed when this quick ste	ep is clicked on.	
📄 Mark as re	ead		• ×
Move to f			• ×
Par Rea	əd		•
Add Action			
Optional —			
Shortcut key: Tooltip text:	This text will show up when the mouse hove	ers over the quick step.	
		Finish	Cancel
Shortcut key:	This text will show up when the mouse hove	ers over the quick step. Finish	Cancel

### REDUCE

REDUCE is the same steps as <u>READ</u> except: in **Step 1**, name the Quick Step "Reduce"; in **Step 5**, choose the *Reduce* folder; in **Step 7**, choose *CTRL+SHIFT+3* as the shortcut.

### FLAG

Very similar to <u>READ</u> and <u>REDUCE</u> except that you will be adding another action.

Step 1: Click on *Create New* in the *Quick Steps* menu on the *Home* ribbon.



**Steps 2-3:** Name the Quick Step "Flag" and select *Mark as Read* from the *Choose an Action* dropdown menu.

Edit Quick Step	?	x
Name: Flag		
Add actions below that will be performed when this quick step is clicked on.		
Mark as read	•	×
- Filing	-	
Move to folder		
Copy to folder		
X Delete message		
× Permanently delete message		
Change Status		
🚖 Mark as read 📐		
Mark as unread	Е	

Step 4: Click on Add Action

Edit Quick Step	8 23
Name: Flag	
Add actions below that will be performed when this quick step Actions	is dicked on.
Mark as read	• ×
Add Action	

**Step 5:** Select *Flag a Message* from the *Choose an Action* dropdown menu.

Edit Quick Step
Name: Flag
Add actions below that will be performed when this quick step is clicked on.
Actions
🔁 Mark as read 🔹 🗙
Choose an Action
Choose an Action
Filing
Move to folder
Copy to folder
× Delete message ≡
× Permanently delete message
Change Status
? Set importance
Categories, Tasks and Flags
Categorize message
Clear Categories
s 🚩 Flag Message 📡

**Step 6:** You will be given the opportunity to *Choose flag*. With these options, you can setup multiple flag Quick Steps for varying (here is a <u>resource on using flags</u>). I, however, would recommend against getting too complicated at the outset. For your first FLAG Quick Step, choose *Today*.

Edit Quick Step
Name: Flag
Add actions below that will be performed when this quick step is clicked on.
Actions
Mark as read
🚩 Flag Message 💽 👻 🗙
Choose flag
Choose flag
Add 🚩 Today
۲omorrow کرچ
🕎 This Week
🕎 Next Week
🕎 This Month
🕎 Next Month
🚩 No Date
Optiona. Mark Complete
Shortqut kev: Choose a shortqut

# Step 7: Click on Add Action

Edit Quick Step
Name: Flag
Add actions below that will be performed when this quick step is clicked on.
Actions
🚩 Flag Message 💽 💌 🗙
🚩 Today 💽
Add Action

**Step 8:** Select *Move to Folder* from the *Choose an Action* dropdown menu.

lit Quick Step	<u>१</u> ×
Name: Flag	
Add actions below that will be performed when this quick ste	ep is clicked on.
Mark as read	• ×
🚩 Flag Message	• ×
🚩 Today	•
Choose an Action	- ×
Choose an Action	<u>^</u>
Filing Move to folder	
X Delete message	
X Permanently delete message	E

Step 9: Select the Read folder.

Edit Quick Step
Name: Flag
Add actions below that will be performed when this quick step is clicked on.
Actions
🚔 Mark as read 🔹 🗙
🚩 Flag Message 🔹 🗙
🚩 Today 🔍
Move to folder
Choose folder
Choose folder
Add 🔁 Read
General/Regions
Carl Reduce

**Step 10**: Now go to the bottom of the menu to *Choose a shortcut*. Any of the shortcuts will do. I recommend *CTRL+SHIFT+2*.

Edit Quick Step		₹ <mark>.</mark> ×			
Nam Flag					
Add actions below that will be performed when this quick step is clicked on.					
Actions					
📄 Mark as re	ad	- ×			
Y Flag Mess	age	- ×			
🚩 Tod	ay	•			
Nove to f	older	- ×			
📬 Rea	ad	<b>•</b>			
Add Action					
Optional					
Shortcut key:	Choose a shortcut 💌				
Tooltip text:	Choose a shortcut	hen mouse hovers over the quick step.			
	CTRL+SHIFT+1				
	CTRL+SHIFT+2	Eith Court			
	CTRL+SHIFT43	Finish Cancel			

Step 11: Press Finish.

Edit Quick Step	23
Name: Flag	
Add actions below that will be performed when this quick step is clicked on.	
Mark as read	×
♥ Flag Message ♥ Today	] ×
A Nove to folder	
The ad Image: The ad Image: The addition of t	]
Add Action	
Optional	_
Shortcut key: Choose a shortcut 💌	
Tooltip text: This text will show up when the mouse hovers over the quick step.	
Finish Ca	ancel

### COMPLETE

COMPLETE is the same steps as <u>FLAG</u> except: in **Step 1**, name the Quick Step "Complete"; in **Step 6**, choose *Mark complete* as the flag; in **Step 10**, choose *CTRL+SHIFT+4* as the shortcut.