

Introduction

[My blog post](#) explained my system for managing email, which seems to work reasonably well for me. It is less of a commitment to a new way of working than the full-on '[Getting Things Done](#)' approach, for which there is specialist software. My approach uses functions already built into Microsoft Outlook, so if you use Outlook you don't need to buy or install any extra software: this note explains how to set it up.

You can also optionally use a paid-for plugin for Outlook to speed up filing of emails, if your system administrator allows you to install plugins; and you can use a paid-for email app that lets you do the triage your mobile phone (again, if your system administrator allows it), but the system does not depend on you using either of these.

Setting up Outlook for the triage system

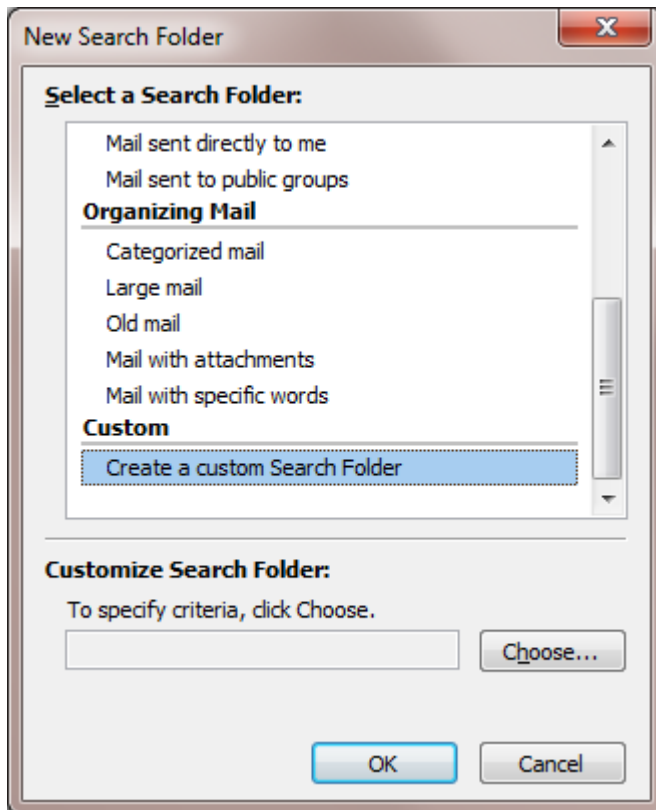
The instructions here are for Outlook 2010 – you can do nearly all of this in earlier versions of Outlook but it may look a little different. It should take about ten minutes to set up.

This guide describes how to (a) set up the three folders; (b) add them to your favourites; (c) change the way they are displayed; (d) set Outlook to open into your 'Today' folder; (e) use the new folder for email triage.

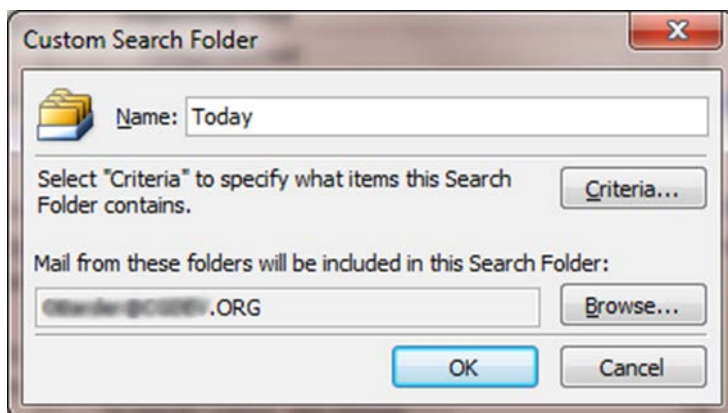
Setting up the three folders

The first thing we are going to do is set up three folders: **Today**, **Future**, and **Inbox (for triage)**. These are all actually 'Search folders' on your inbox. (If you use this system, you won't use the actual inbox in Outlook any more, though all your unfiled emails are in fact still sitting there behind the scenes).

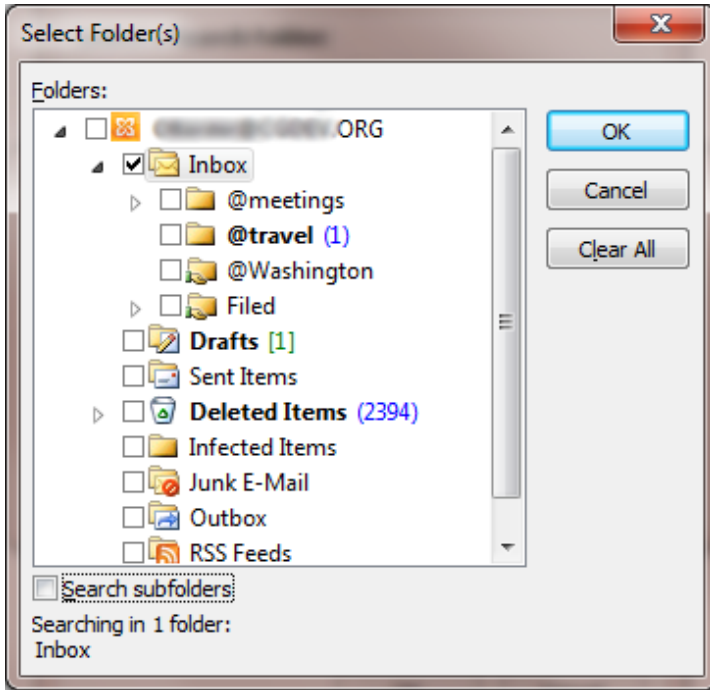
To set up your '**Today**' box: choose the 'Folder' tab in the Outlook ribbon bar, then 'New Search Folder'. Go to the bottom of the list and highlight 'Create a custom Search Folder'



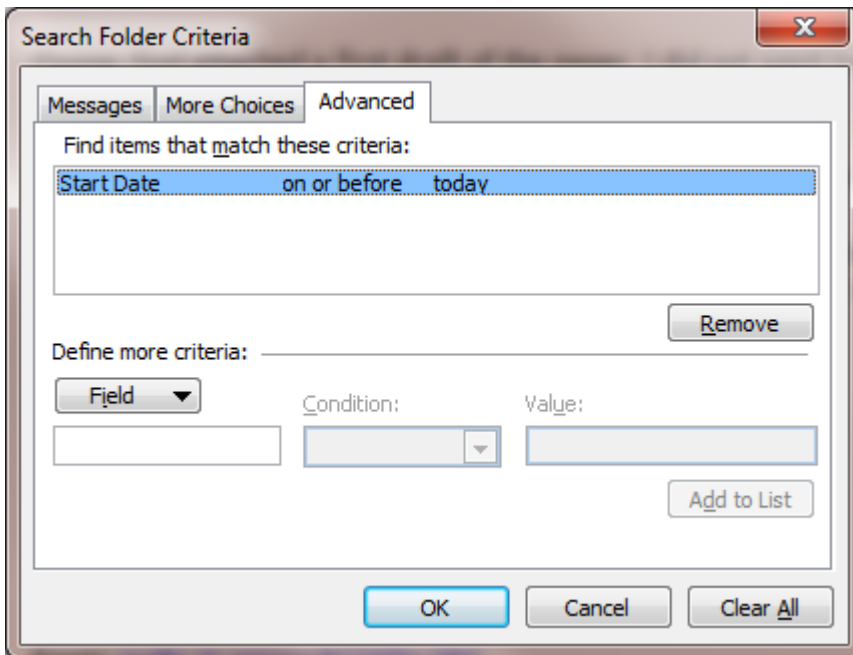
Press the 'Choose' button and give the folder a name such as 'Today':



Then choose 'Browse' under 'Mail from these folders will be included in this Search Folder' and select your inbox. Uncheck 'search subfolders' so that it looks like the diagram below.

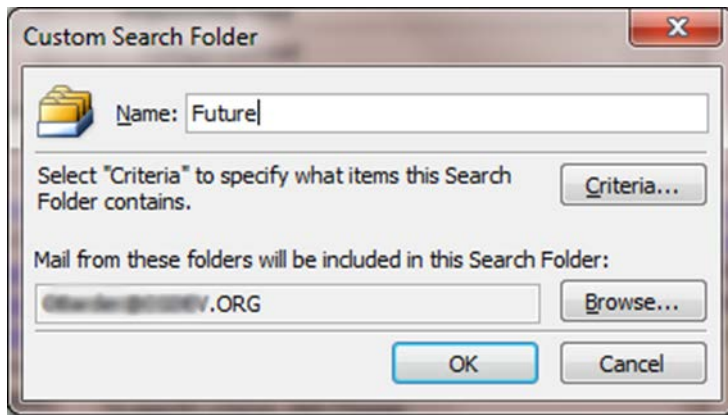


Then choose *Criteria* and the *Advanced* tab, and use the *Field* button to add the condition 'Start Date is on or before today'. Click OK and your search folder criteria should look like this:

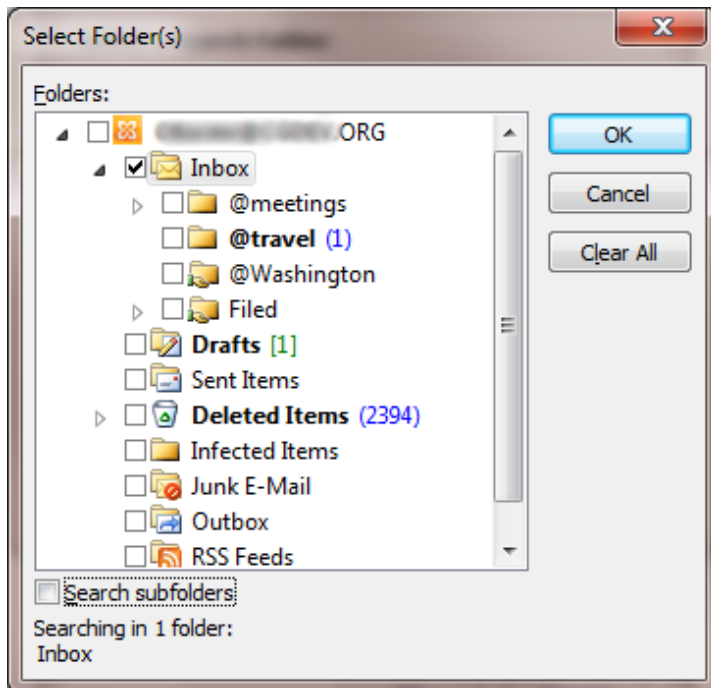


Press OK to create your **Today** folder.

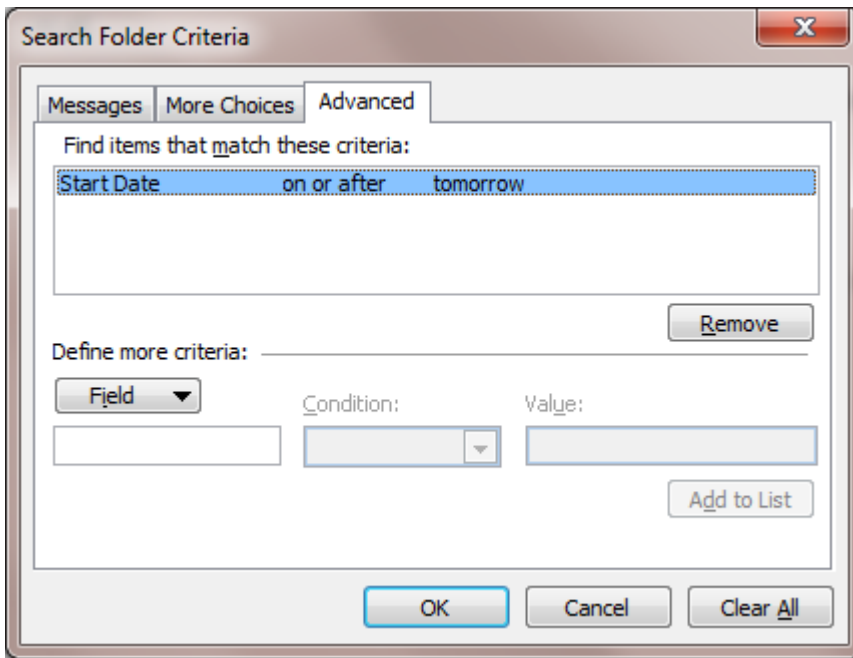
Second, we need to create your folder for emails for future action. As before, create a *Custom Search Folder*, and call it '**Future**' (or whatever you want).



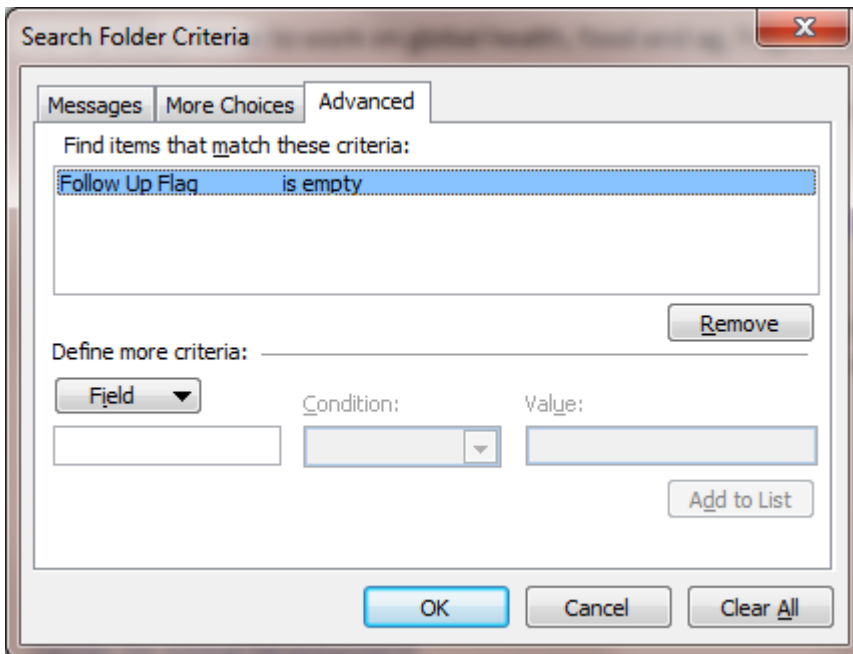
Again, choose your inbox and uncheck the subfolders:



For this folder, set it to include items which meet the *Search Folder Criteria*: 'Start Date is on or after tomorrow'. It should look like this:

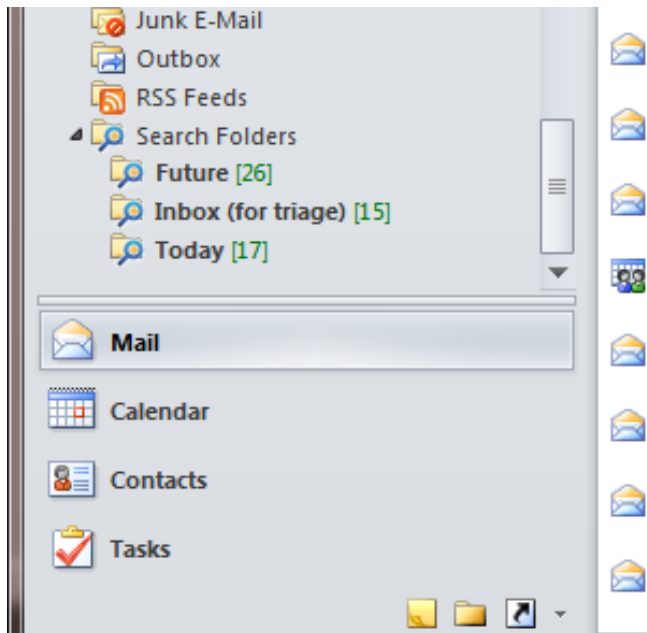


Third, are now going to create a new customized search folder, called **'Inbox (for triage)'**. For this, again you should choose your inbox, and uncheck the sub-folders; and the *Search Folder Criteria* is 'Follow up Flag is empty':

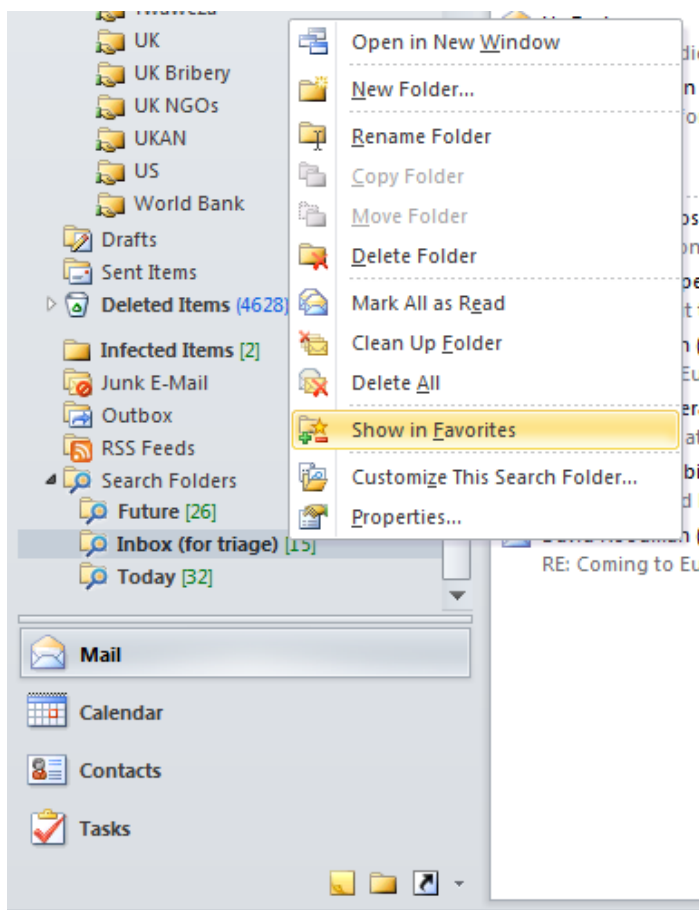


Changing how you view your three mailboxes

If you scroll down to the bottom of your mailbox, you should now see the three new Search folders that you have created:

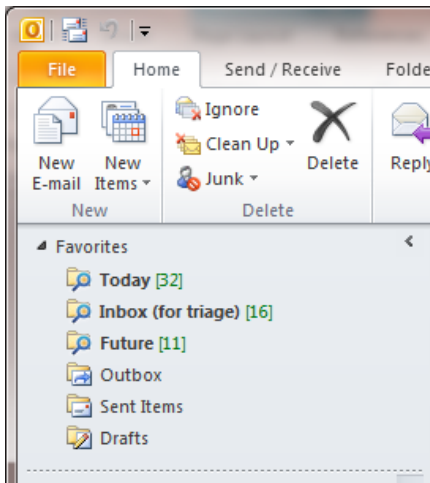


Now right click each of the folders, and choose 'Show in favorites':

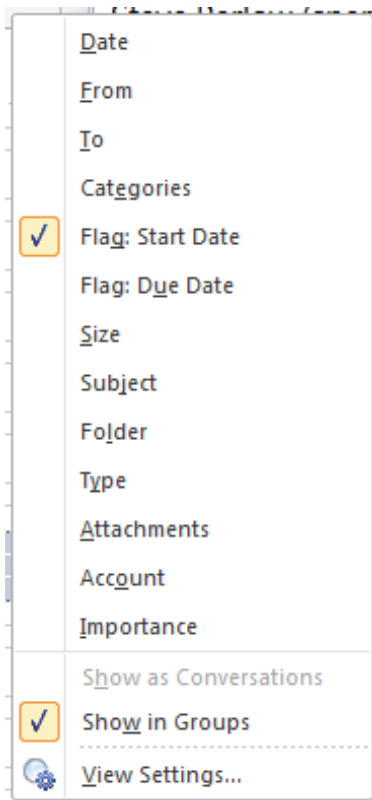


When you have marked all three of the new folders to appear in your favourites, scroll back up to the top of your email, and you should see them there. Use drag and drop to rearrange the folders

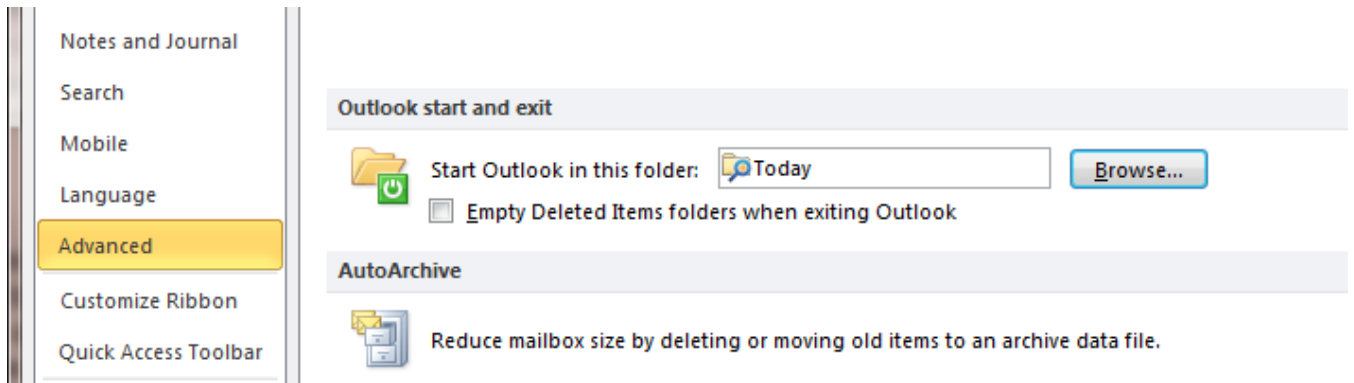
in whatever order you like. I prefer to have 'Today' at the top. Your favourites folder should now look like this:



Now click into the folders to change the way they are sorted when you go into them. In each folder, right click the header bar (just under the search box), and choose Flag Start Date and Show in Groups:



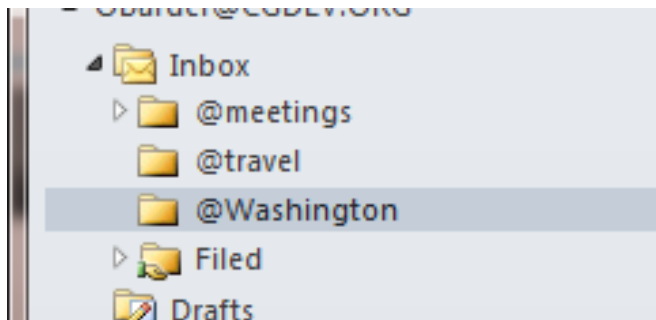
You can set Outlook to open automatically into your 'Today' folder. Go to File, then Options, then Advance, and then use Browse to choose your 'Today' folder as your start and exit folder.



That's it: you have set up your three folders and how they are displayed. Your real email inbox will also be shown in your favourites by default – you can either keep it there (in which case I suggest you have it at the bottom of the favourites) or you can remove it from the favourites list altogether.

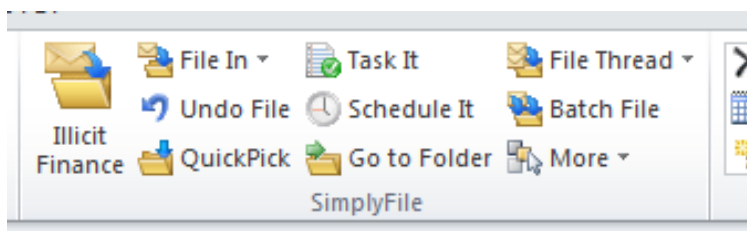
Create context folders

Once you have organised your inbox, you should also create your context folders. Mine include @meetings, @travel and @Washington. Just right click the inbox and choose "Create Folder". Use the '@' sign to ensure that the context folders are at the top.



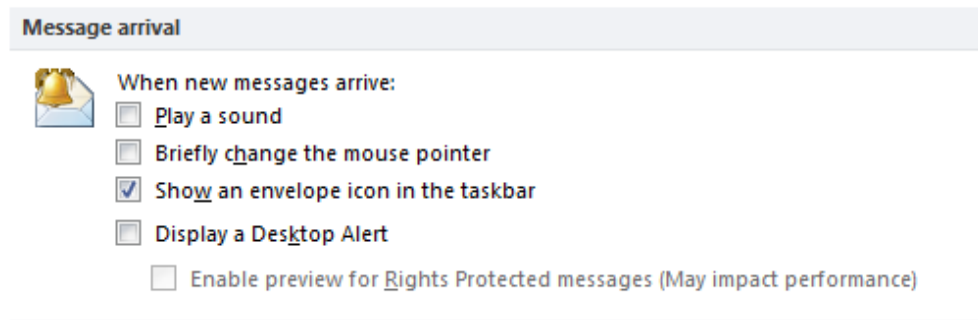
Optional: smart filing – a (paid for) plugin for Outlook

I also use a useful Outlook plugin called [SimplyFile](#) to speed up filing messages in the correct folder. You may not be able to install this if your computer is locked down by your system administrator, and it costs \$50 for a licence (but there is a 30 day trial period). This plugin was worth the money for me: it analyses your mail and makes a good guess about where you are likely to want to file each email. If it guesses wrong, the QuickPick search utility lets you find the right folder more quickly.



Turn off email notifications

You may also want to turn off email notifications, so that incoming emails do not disturb you while you are working on your **'Today'** folder. To do this, go to File on the top menu, then Options, then Mail. My message arrival settings are:

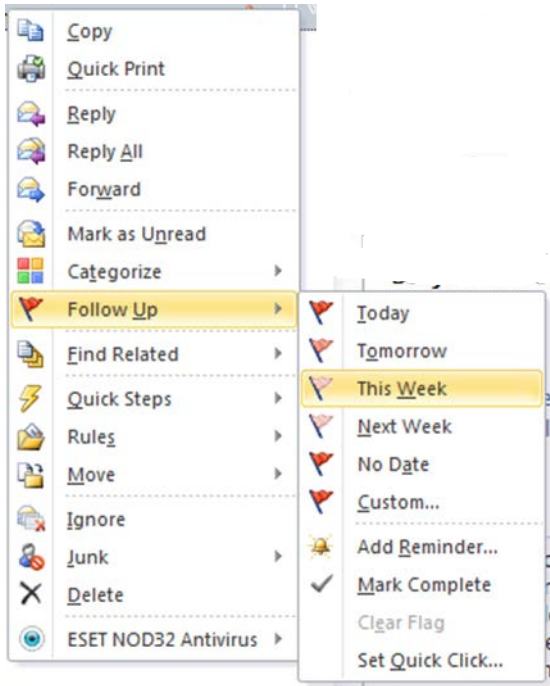


How to triage your emails

When you triage your emails, you are going to choose from one of the four Ds: **deal**, **delegate**, **defer**, or **delete or file**.

- If you can **deal** with an email in less than five minutes, do it right away while you are triaging your emails. Then delete or file the email, or defer it if you want to be reminded of the issue again later.
- If you are going to **delegate** a task, the best time to do so is during your triage. Once you have forwarded the email to the person to whom you are delegating it, with your guidance and deadline if appropriate, you can then defer the original incoming email so that you are reminded of it when the work is due.
- Other emails you can either **delete** or **drop** into a folder. I delete very little – with storage so cheap, I prefer to keep it. I have a simple filing structure with about 200 subject folders, and I use [SimplyFile](#) to speed up filing. Some people swear by putting everything into a single 'Filed' folder and then using search to find what they need afterwards. If your office sets a size limit on your mailbox, use the auto-archive facility to keep down the total size of your email folder on the server.
- Finally, to **defer**, you right click the email, and set the 'Follow Up' flag to the date you want to see it again, as shown in the picture below. This may involve setting the email to deal with 'Today' or 'Tomorrow', or setting a date when you want to look at it. If you want to adopt my habit of deferring some emails for the first Monday of a future month, you can choose the Custom option, and then easily use the date picker for an appropriate Monday in the future.

This is what it looks like when you defer an email:



As you flag each email with a date, it will automatically disappear from your **'Inbox (for triage)'** and appear in either the **'Today'** folder or the **'Future'** folder.

When your triage inbox is empty, return to the **'Today'** folder to work on the emails that have been marked for your attention today. Your Today folder will also contain any emails which were scheduled for the past but which you have not dealt with: they will automatically be highlighted in red.

When you have dealt with an email in your Today folder, you can either delete it, drop it into a folder, or defer it again for a day when you want to be reminded about it (e.g. to follow up if you are expecting a reply).

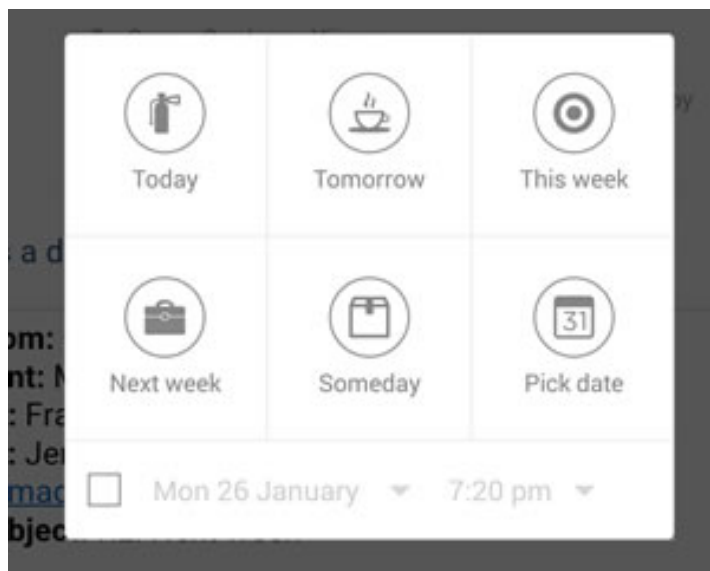
If you manage to empty your **'Today'** folder, you can then start to work your way through the **'Future'** folder instead (or go out for a run!)

If you have hundreds of emails in your inbox doing your triage for the first time may well take a long time. Set aside a few hours, or even a whole afternoon, to do that if necessary. From then on you will only have to spend a few minutes triaging your email a few times each day.

Triage on the Road - Nine

I use an Android mobile phone and an email client called [Nine](#) which connects to our office Exchange server. Your office may or may not allow this kind of thing.

If you are able to use Nine, you can use it to flag the date you want to look at an email, using a dialog that looks like this:



The choices you make in Nine will automatically be carried across to your emails when you look at them in Outlook. So you can use your morning commute, for example, to triage your emails on your phone, and when you get to your computer in the office you can focus on your “Today” folder.

The art of procrastination

I have a fair few emails which I may want to read and think about later, but which I don't have time for at the moment.

All these I defer to a future Monday – usually the first Monday of the following month (or the first Monday of a later month for things I which I really want to leave until later).

This means that on the first Monday of the month my inbox contains a larger-than-unusual range of emails. I usually set aside an hour to go through them more carefully. For some, the moment has passed, and I delete them. For some, I decide that I am going to make time in the coming month to work on the issue: in which case I put a sensible date during the month for the email to come back to arrive in my inbox so I can work on it. And others get deferred for another month or two.

One way to think of this is as a giant conveyor belt of emails arriving in your inbox each day. Some of them you deal with as they arrive: others you pick up and put back on the conveyor belt further back where you see a gap, confident that it will arrive again in front of you at a time when (you hope) you have more time to deal with it.

