

Outlook 2016 Tips & Tricks



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Course Outline

In this course, you'll learn some tips to...

- Organize your emails for better efficiency
- Schedule your time using the calendar
- Prioritize & automate some of your activities

Email Best Practices

- Customize inbox to your specific needs
- Decide what to do with each message as soon as you browse it
- Focus on what is important to you
- Schedule dedicated time for processing your emails
- Turn off popups or customize them

Develop a suitable approach

Decide what to do with each message as soon as it arrives, to gain more control and improve response time.

- Schedule a dedicated time for processing emails
 - Morning 1 hr, midday ½ hr and end of day 1 hr
- Read it once and act on it
 - If you cannot delete or do it in less than 2 minutes, then place it in the Action folder with appropriate categories. (Do/Delegate/Defer)

Take control of your Inbox

- Setup Views to work through volumes of email
- Setup a simple and effective folder system
- Assign useful categories with colors to organize emails
- Automate your most repetitive tasks
- Apply a decision making model to manage your mailbox

Screen view Tools

- Screen Layout
 - Folder pane
 - Reading pane
 - To-Do Bar
 - View by Fields
- Navigation Bar
- Quick Access Toolbar
- Status Bar

Conversation Views

A conversation is a **complete set** of emails with the **same subject** from the first message through all responses.

It is most useful on conversations with many responses back and forth with multiple recipients.

Conversation View:

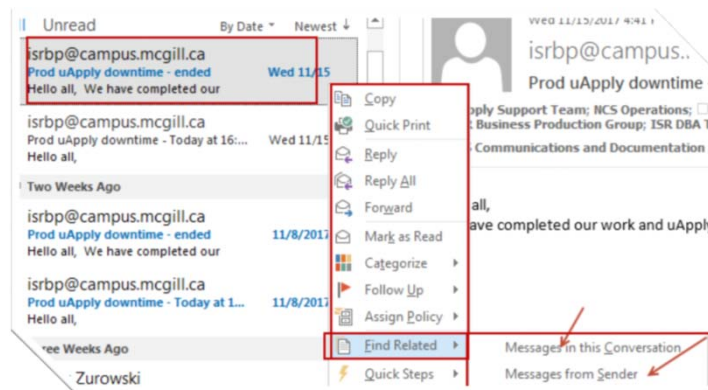
- **View > Messages > Show as Conversations**

To ungroup Conversations:

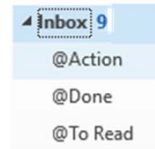
- From **View** tab, deselect Show as Conversations.

Find Related Messages

Right click on a message and select **Find Related** and then select messages in this conversation or from the sender option.



Folders



For example: create 3 folders in the Inbox.

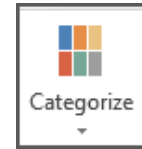
- **@Action** – for emails that need to be taken care of
- **@To Read** – informative emails which require more time to read
- **@Done** - emails that are Done and to Keep

Categories



- A color and/or phrase to group related items together
- The same category can be assigned to all Outlook items such as a calendar entry, a contact or a task (useful to find all items related to a project)
- More than one category can be assigned to an item (R2R, budget, support, training etc.)
- Much more efficient than using separate folders.

Categories cont'd...

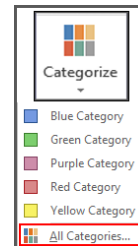


Create 3 categories to manage the **Action** folder.

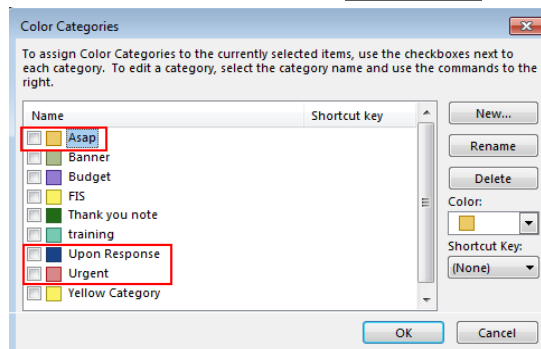
1. **Urgent**
 - Actionable within 24 hours
2. **ASAP**
 - Actionable within 2,3 days
3. **Upon Response**
 - Actionable only after receiving a response

Assign Color to Categories

Categorize > All Categories



- **Red** color to **Urgent**
- **Orange** color to **ASAP**
- **Blue** color to **Upon Response**



Quick steps



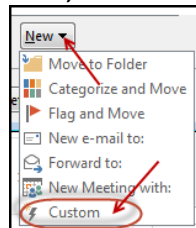
Quick Steps is an outlook feature that allows you to:

- quickly and easily perform multiple actions with a single click of your mouse
- spend less time managing your email

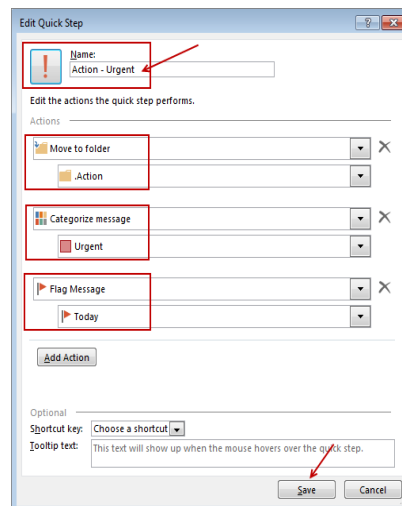
From the **Home** tab, click the '**Quick Steps**' dialog box launcher, to create quick steps.

Quick steps cont'd...

1. From the **New** drop down list, select 'Custom'



2. Type in a name and specify the actions to do.
3. Create 5 different Quick Steps.

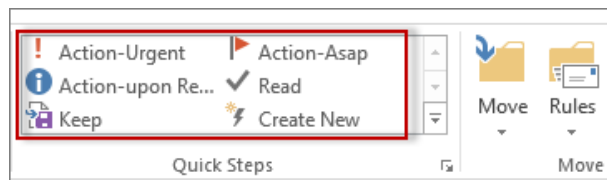


Quick Steps cont'd...

Name	Actions
Action ! Urgent	Move to folder - Action Categorize message - Urgent Flag message - Today
Action ▶ Asap	Move to folder - Action Categorize message - Asap Flag message - this week
Action i Upon Response	Move to folder - Action Categorize message - Upon Response Flag message - No date
Read ☑	Move to folder - Read
Keep 📁	Move to folder - Keep Mark as read Categorize message - Clear all Flag message - Clear all flag

Using Quick Steps

The Quick steps will appear in the email ribbon as below:



- Go through the Inbox, decide what to do with each email (Action, Read or Keep) using the quick steps.
- View and arrange emails in Action folder by categories.
- From the Action folder respond to emails.

Signatures

Creating signatures

1. File>Options>Mail>Signatures>New
2. Enter the signature text in the box .
3. Select the signature for new messages.

Manually adding signature

- From the **Message** tab, **Include** group, click **signature** and select the signature to insert.

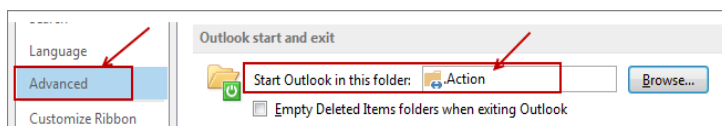
Customizing

Scheduling Action Items

- Work from the Action folder, for all your priority messages.
- Any email that require some of your time, drag it to your calendar and schedule time for it.

Outlook's Start folder

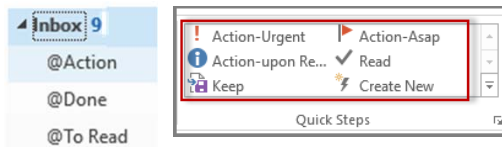
- **File> Options> Advanced> Start outlook from Action folder**



More Options...

- **Voting Buttons**
- **Delayed Delivery**
- **Direct Replies To**
- **Display Bcc and From fields**
- **Automatically empty Deleted items folder**
(File> Options> Advanced...)

Recap



There are many ways and best practices to organize an Inbox and effectively manage emails.

Following are the ground works that we did now.

- Organize emails with few folders
- View actionable emails at a glance
- Use quick steps to do repetitive tasks
- Use voting buttons to create polls and tracking
(Options > Tracking group, Use Voting buttons)

Magic of Rules

Rules will:

- make it easy to sort / route emails
- process the emails, before it arrive in your Inbox
- de-clutter your Inbox of 'graymail'
- act as an electronic receptionist
- help you stay organized to use your time more efficiently

Rules cont'd...

To filter messages based on:

- Who the sender is
- To whom it is addressed to
- specific words in subject or message etc.

To do something with it, such as:

- Move or delete
- Reply or forward
- Flag it for follow up
- Assign a category etc.

Quick Steps vs Rules

- Quick steps are flexible, you can choose to apply them when you want to use them.
- Use quick steps, when you need to do certain actions only after seeing the message.
- Rules are less flexible, once the rules are setup, they are applied automatically.
- Use rules when you can identify a message that should be handled in a specific way always.

Recap

- Organize mailbox using few folders
- Assign categories with color to view priority emails at a glance
- Create and use Quick steps to save time
- Conversation Clean Up
- Using Voting buttons
- Create rules to organize emails as it arrives

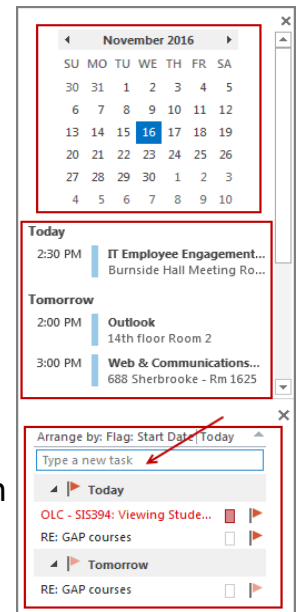
View > To-Do Bar

To-Do Bar displays a snapshot of your work day, including:

- calendar
- appointments &
- tasks

while you are in the email view.

Can create a new task by simply typing in the To-Do bar column

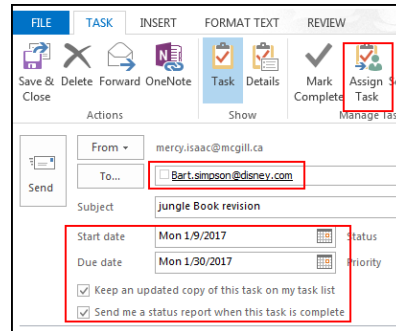
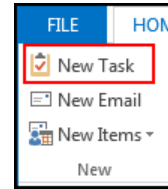


Calendar & Tasks

- Calendar blocks off a period of time to do something (a meeting)
- Tasks is like a checklist for you to do something (pick up laundry)
- Calendar and Tasks can have reminders
- Calendar item stick to the assigned date. It will not reappear each day
- Tasks stay on your list of things to do until you do it

Assigning tasks to others

- Can delegate task to others and keep track of its progress.
- Click on New Task and then Assign Task.
- Assign a category, due date and any notes to the task.
- Check to keep updated and status report options.



Outlook Calendar

Calendar techniques helps you to:

- Plan your day more effectively
- Customize settings to show exactly what you want
- Use shortcuts to navigate and view your schedule
- Share your availability with others

Viewing Calendar

- View calendar by day, week or month
- Highlight multiple days to see those calendar days
- To find your availability on random days: (8, 17, 29):
 - Select Day view, hold down Ctrl key and click on 8,17 & 29.
- To view a particular day:
 1. Press Ctrl+G
 2. Then specify a date or even enter in normal language like , '2nd Monday in December'

Calendar Settings

- File > Options> Calendar:
 - Work hours - start/end time
 - Uncheck default reminders
 - Add holidays, time zones etc.
- Show weather on the calendar
- Use categories with color to recognize your days activities
- Set appointments as private, out of office (eg. Vacation)
- Set up recurring meetings in one step

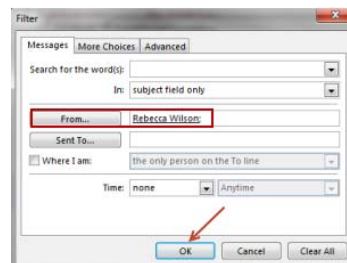
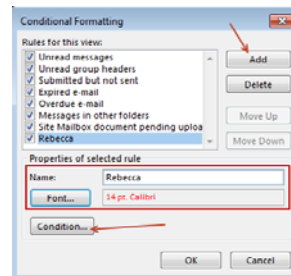
Calendar Options

- Change an email to a calendar item
 - Simply drag the email from the mailbox to the calendar. Specify the date and time for the appointment.
- Can create multiple calendars (e.g. a calendar for work and another one for personal appointments)
 - From calendar **Home** tab, Manage calendars group, click **Open calendar**, select **Create New Blank Calendar** and enter a name for the new calendar.

Conditional formatting

To automatically color code all messages from a particular person:

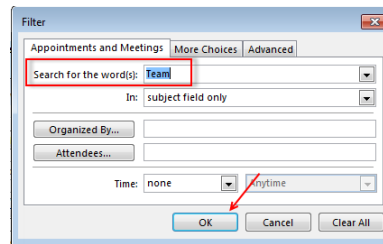
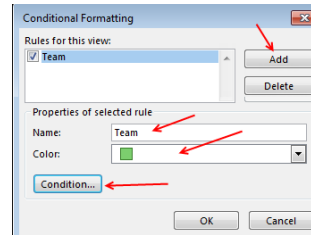
1. View > View Settings > Conditional formatting > Add
2. Enter a name
3. Select a font color and Condition (specify the From name)
4. Click OK



Conditional formatting cont'd...

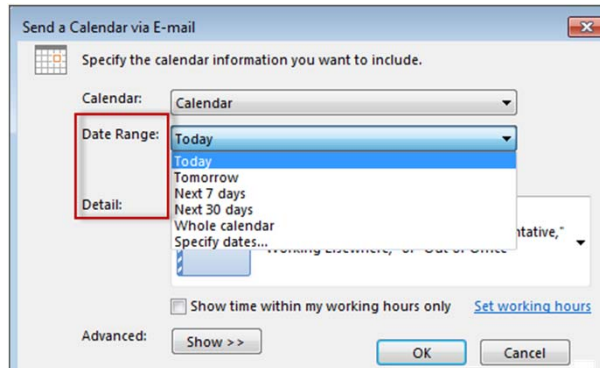
To automatically color code calendar items:

1. Click View > View Settings > Conditional formatting > Add.
2. Enter a name.
3. Select a color and Condition (specify the condition).
4. Click OK.



Send calendar by E-Mail

- Share calendar with others outside your organization
Home > E-mail Calendar > specify date range, details to include etc. and then click Ok.



List of communications

From email view, click the person icon at bottom right corner of reading pane to see a list of emails, meetings, tasks etc. received and exchanged with that person.



Tasks and Contacts

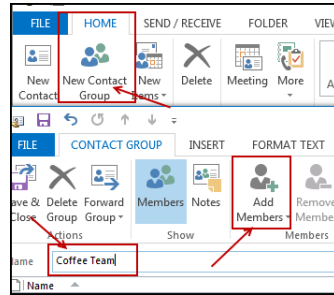
- Can create TODO item from contacts.
- Flagging a contact is an efficient way to attach the contact info to your task item.
- Right click the contact and select a follow-up date.
- The flagged contact will show up in your task list and todo bar.

Contact Groups

➤ Create new contact group:

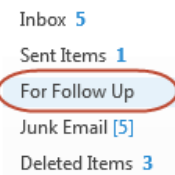
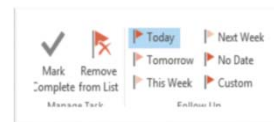
- **Home > New contact group**
- Enter a name for the group
- Click **Add Members** to Add people from the contact list
- Click **Save & Close**

➤ Use the group name to send emails and schedule meetings



Set or remove Reminders

- **Email:** Home > Follow Up > Add Reminder
- **Tasks:** Home > To Do List
 - To add a reminder use **Follow Up** group item
 - To remove a reminder use **Manage Task** item.
- **Calendar:** File > Options > Calendar > Default reminders
- Open Individual item > Options group, Reminder
- To view all flagged messages together, click the 'For Follow Up' preset button.

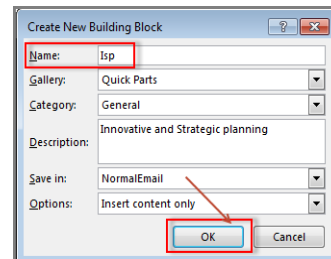
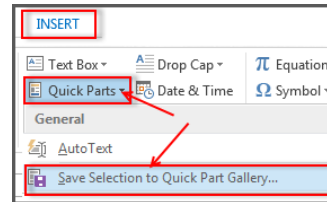


Quick Parts

Quick part is to create and store reusable pieces of content (auto text).

To create a Quick Part:

1. Create a New mail, type the text you want to save & highlight it.
2. **Insert > Quick Parts > Save selection to quick part gallery**
3. Enter a short name in **Name** box
4. Click **OK**



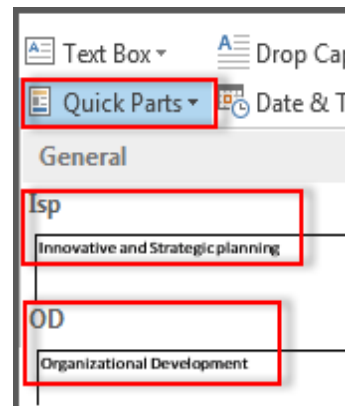
Using Quick Parts / Auto Text

To use a Quick Parts:

- Type the short name (ex. **Isp** or **Od**) and press **F3**.

OR

- Click Quick Parts and then click on any of the saved quick part item from the list.



To Replace text as you type

- **File > Options > Mail > Spelling and Autocorrect > Autocorrect options**
- Enter the abbreviation text in the **Replace** box, Click **Add**

Replace text as you type

Replace: With: Plain text Formatted text

maintenance	maintenance
makeing	making
managment	management
may of been	may have been

Template

A template is a message that you save to reuse it later.

To create a template:

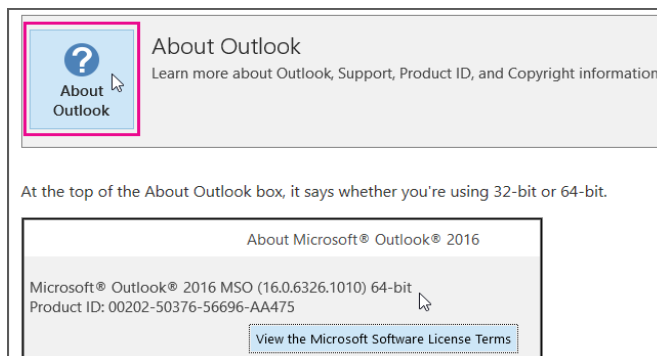
1. Open a New Message form and create the template the same way you create an email.
2. **File > Save As.**
3. Select **Outlook Template (*.oft)** from **Save as Type** box.
4. Enter a name in **File name** box.
5. Click **Save.**

Using Template

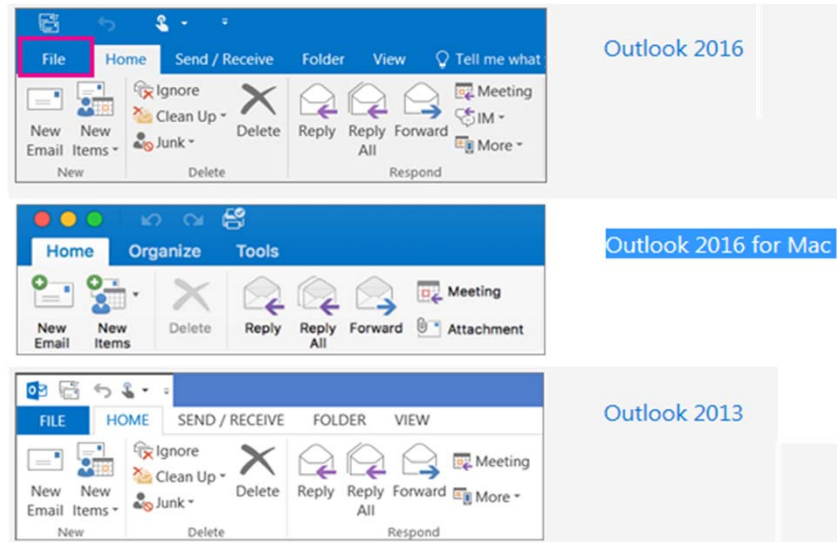
1. From **Home** tab > **New Items** > **More Items** > **Choose form...**
2. Select **User Templates in File System** from the **Look in** drop-down list
3. Select the Template to use and click **Open**
4. Finish creating the message
5. Click **Send** to send the message

Outlook Version?

1. From **File** tab > **Office Account**.
2. To see whether you are using 32bit or 64bit, click **About Outlook**.



Outlook Version?



Final Recap

- Organizing Outlook items with:
 - Folders , Categories and Colors
 - Quick Steps to do multiple actions & save time
 - Rules to automatically process emails
 - Quick Parts (auto text) to save keystrokes
 - Templates to compose similar messages
- Viewing a snapshot of your workday (To-Do bar)
- Using conditional formatting to automatically color code calendar items

Keyboard Shortcuts

Ctrl+Shift+m New Message
Ctrl+Shift+i Moves to Inbox
Ctrl+Shift+k New Task
Ctrl+Shift+e New email folder

Ctrl+N Create new item
Ctrl+S Send a message
Ctrl+R to reply
Ctrl+F to forward
Ctrl+D to delete

Ctrl+1 for Mail
Ctrl+2 for Calendar
Ctrl+3 for Contacts
Ctrl+4 for Tasks
Ctrl+5 for Notes
Ctrl+6 folder list

THANK YOU

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