

# PRODUCTIVITY TIPS USING OUTLOOK 2016

Washtenaw  
Community  
College

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# EMAIL MANAGEMENT

## 1. CREATE A RULE:

Rules are a great way to re-route messages into folders as they come into your inbox. You can create a rule from a template, from a message, or using your own conditions.

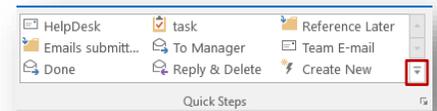
- From the **Home** tab, click **Rules**
  1. Click **Manage Rules & Alerts**.
  2. Click **New Rule**. The Rules Wizard will appear.
  3. Select the type of rule you want to create.
  4. Select the hyperlink **people or public group** and pick the name or group you want to apply the rule to.
  5. Select the hyperlink **specified** and select which folder you want it to go to.
  6. Click **Next**.
  7. Select the checkbox next to the condition you want to set.
  8. Edit the rule description as you did in *step 6*.
  9. Click **Next** or **Finish**.

Apply this rule after the message arrives from **people or public group** move it to the **specified** folder and stop processing more rules

## 2. QUICK STEPS

Automate common or repetitive tasks by applying multiple actions at the same time to email messages. For example, if you forward messages to your manager or colleagues a Quick Step can help simplify the task.

1. In **Mail**, on the **Home** tab, in the **Quick Steps** group click the more arrow
2. Click **Manage Quick Steps**
3. Under Actions, change or add the actions you want the quick step to do
4. Click **ok**



## 3. ADD A FOLDER TO YOUR FAVORITES

If you use A LOT of folders in Outlook to keep your email messages organized, you may find yourself scrolling up and down the list to locate a particular folder. (If you use rules, you may miss new messages if a particular folder is out of your view)

To find the folder you need quickly, (instead of scrolling) you can add your frequently accessed folders to the favorites section in the Outlook Navigation pane.

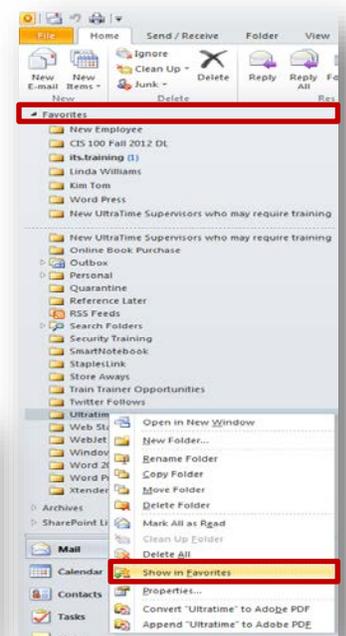
### TO SHOW FOLDERS IN YOUR FAVORITES

- **Right-click** the folder you want to add, and then on the shortcut menu, click **Show in Favorites**
- Repeat this for each folder that you want to add.

#### Example:

- I want to add UltraTime to my Favorites.
- I scrolled down the list until I found the UltraTime folder.
- I right clicked on the UltraTime folder and then I clicked Show in Favorites.
- UltraTime has now been added to my Favorites list.

*Note: When you add a folder to the Favorites area, the folder doesn't physically move, it just creates a shortcut*

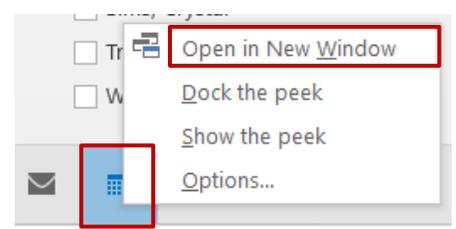


## 4. OPEN YOUR CALENDAR AND EMAIL AT THE SAME TIME

Instead of switching back and forth from your Inbox to your calendar. You can view your mail and the calendar at the same time.

To view your Calendar while in your mail:

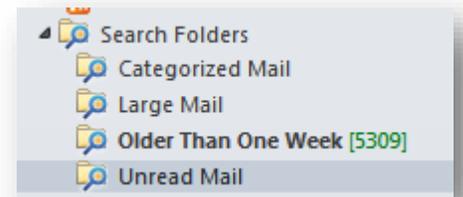
- **Right click** the **Calendar** button in the Navigation Pane and choose **Open in New Window**.



## 5. CREATE A SEARCH FOLDER:

Search folders- Quickly allow you to locate messages located in other folders based on specific search conditions. The results are displayed in a "virtual" folder (meaning they don't actually contain the messages, the actual messages are located in another folder) it's just a way to group the messages into one location.

Outlook provides the following default Search Folders: These default search folders look for email messages in all of your mailbox folders and will display them in the search folder.



### TO USE AN EXISTING SEARCH FOLDER:

1. Click the Mail button in the Navigation pane
2. Click the arrow next to Search Folders to Expand view.
3. Click Large Mail
4. All of the messages that are larger than 100KB in file size are displayed in the message pane

### CREATE A NEW SEARCH FOLDER:

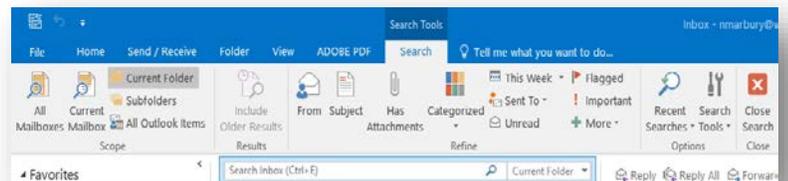
1. Click the Mail button in the Navigation pane
2. Click the Folder Tab on the Ribbon
3. Click New Search Folder
  - a. The New Search Folder dialog box appears
4. Select a condition
5. Follow Steps
6. Click Ok
7. The New search folder will appear in the Navigation pane

## 6. INSTANT SEARCH

Click the search bar above the contents of your inbox

Enter your search criteria. An additional toolbar appears allowing you to quickly add criteria such as from, with attachment, etc.

By default, it will search the current folder. Click All Outlook items to expand the search to your



## 7. CONDITIONAL FORMATTING

On the Outlook Ribbon

1. Click on the **View Tab**
2. Click, **View Settings**
3. Click **Conditional Formatting**
4. Click **Add**; give the rule a name
5. Click **Font**,
6. You can change font type, font color, font size, etc...then click ok
7. Click **Condition**
8. Click the **From** box, and find the person in the Global address book.
9. Click **ok**,

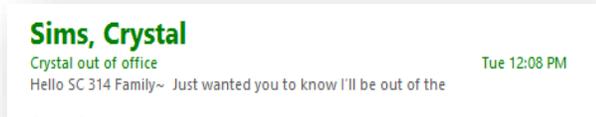
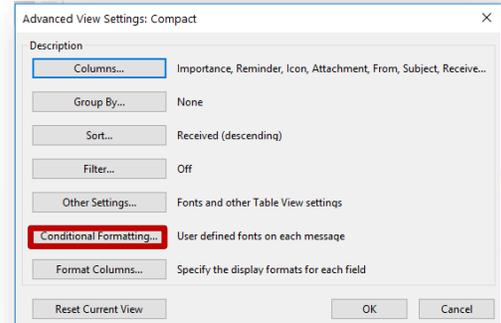
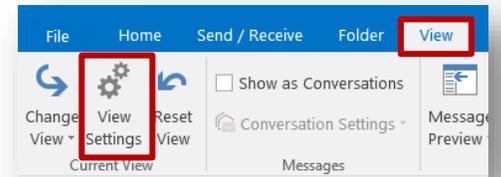


FIGURE 1: EXAMPLE OF CONDITIONAL FORMATTING



## 8. QUICK PARTS

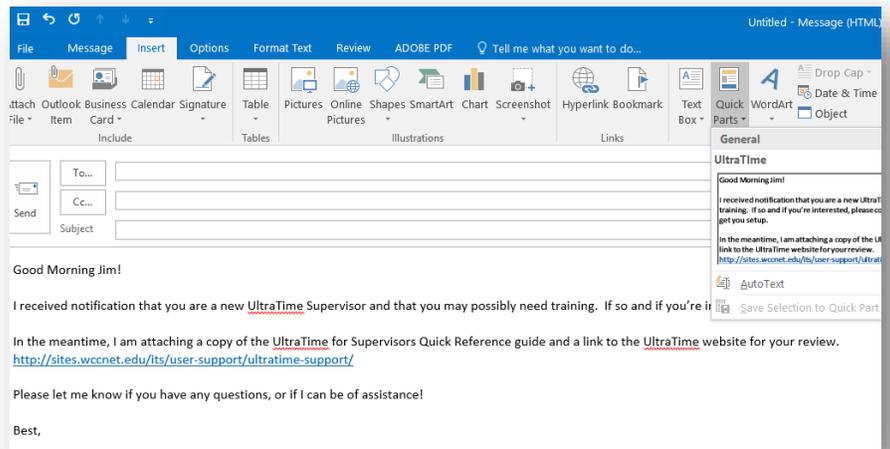
Do you spend time in the sent folder looking for a message to reuse? Instead of creating the same messages over and over, you can create the message one time by creating and using a Quick Part.

To create a Quick Part

1. Type the text you want to use in a Quick Part into a new email message.
2. Select the text block and click the **Quick Parts** icon on the Insert ribbon tab.
3. Select **Save selection to the Quick Part Gallery**, at the bottom of the flyout.
4. Complete the New Building Block dialog and click Ok to save it.

To use a quick part

1. Click the Insert tab.
2. Click Quick Parts.
3. Select the entry



Note: You can also just start typing the entry's name in the body of the email. When you see the screen tip with the beginning of the entry's text press Enter.

## CALENDAR

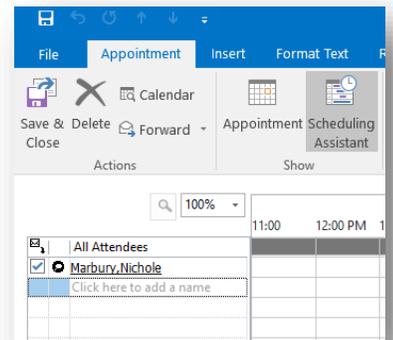
### 9. DRAG AND DROP EMAIL TO CALENDAR TO CREATE A NEW APPOINTMENT

When you want to include the content of an email message to a meeting and or appointment, you can drag the message onto the calendar and then change pertinent details.

## 10. SCHEDULING ASSISTANT

When scheduling a meeting, it is useful to know when your invitees have available times on their calendars. You can do this using the **Scheduling Assistant**, which will allow you to view the availability of others in the Global Address List.

1. Open the **New Meeting dialog box**, or an existing meeting from your Calendar,
2. Select the **Scheduling Assistant** button
3. Type in the names of additional attendees
4. Save and close



## 5. COLOR CATEGORIES

Track items related to a particular project and or meeting request. Categories help with organizing information on your calendar by allowing you to easily identify information.

