**Outlook Training**

**Productivity**

* 2-minute rule
* 3 folders: to do; follow-up; someday
* Schedule time
* Rules
* Clean-Up folder
* 4 d’s: delete, do, delegate, defer
* Touch it once

**Email Guidelines—see handout**

**Email Netiquette**

* Don’t address until ready to send.
* Wait 24 hours if answering a rude one.
* Acknowledge an email if it is going to take time to answer.
* One subject per email; with unique and informative subject.
* Don’t use old email with unrelated subject.
* Be thorough in request and reply.
* File emails!
* Pick up phone if easier and will take multiple emails.
* Spell check
* Double-check attachment before sending.
* Don’t assume they have received it.

**Outlook – 5 components. EM me if want tasks/note training**

**Email Basics**

* Overall
	+ Sorting by columns – reading pane bottom; Sorting by arrow – reading pane right. (view t– layout gr)
* In a new message window
	+ Home tab
		- Check Names – names group
		- Attach file – include group
		- Attach Item – include group
		- Signature – include group
		- Importance – tags group
	+ Options tab
		- Adding BC line. Difference between CC & BC. – show fields group
	+ Format tab
		- HTML/Plain text – format group
* In the email window
	+ Home tab
		- Delete. Permanently delete – delete group
		- Reply vs reply all – respond group
		- Meeting – respond group
		- Move – respond group
		- Follow-up – respond group
	+ View tab
		- Reading pane – layout group. Stay in BOTTOM
		- Folder pane – layout group
		- To-do bar – layout group
		- Message preview – arrangement group
		- Add columns – arrangement group.
	+ Miscellaneous
		- Right-click folder to…
			* Make folders – rename, delete, move
			* Make favorite
		- RC email to…
			* Junk
			* Categorize (teach later)
			* Create a rule (Teach later)
* Options:
	+ Out of office replies – file tab
	+ Creating a signature – file tab; options – mail

**People Basics**

* Global Address List (GAL) – not automatically in people
	+ Address book set-up for students
	+ Make new email – click on to - go to the list & RC to add to contacts. Can add multiple.
* In the people window
	+ Different views – current view group. STAY IN PHONE. Can sort by columns same as email
	+ Add a contact – save & new; save & new same company – new group
	+ Create a contact group – does not automatically sync if changes. – new group
	+ Email from contact – multiple ones – communicate group
	+ Meeting from contact – communicate group
	+ Forward contact – share group
* In the new contacts windows
	+ Picture
	+ Categorize

**Calendar Etiquette**

* Answer invites – so organizer can track replies
* Keep it up-to-date
* Show as

**Calendar Basic**

* In Calendar Window—home tab
	+ Appointment vs meeting – new group
	+ Views – arrange group
	+ Open calendar – new blank calendar or RC – manage calendars group. Make a new one
	+ Email calendar – share group
	+ Sharing calendar – share group
	+ Calendar Permission – share group
* In Calendar Window – view tab
	+ Time scale – arrangement group
	+ Color – color group
	+ Reading pane and others – layout group
	+ Show two calendars – RC on tab to overlay
* New Meeting – home tab; new meeting
	+ Scheduling assistant – show group
		- Address book; check names
		- Click appointment to go back to meeting invite
	+ Show as – options group
	+ Reminders – options group
	+ Recurring – options group
	+ Room finder – options group. See handout
	+ Categorize – tags group
	+ Importance – tags group
	+ Response options - attendees
	+ All-day
* Miscellaneous
	+ Drag appointments in calendar

**Email Advanced**

* In email windows—home tab
	+ Search email. Have reading pane at bottom.
	+ New Items – new group
	+ Meeting from email – respond group
	+ Quick Steps – quick steps group
	+ Rules – move group
	+ Categories – tags group
	+ Follow-Up – tags group
* In email window—folder tab
	+ Search folders – new group
* In new email window—options tab
	+ Voting buttons – tracking group
	+ Delivery/read receipt – tracking group
	+ Delay delivery option – tracking group
	+ Direct reply feature – tracking group
* In email window—insert tab
	+ Quick parts – text group
* Miscellaneous
	+ RC folder – show number of items
	+ Make received EM important – open email; tags group – open it.
	+ EM to task

**Overall**

* Desktop vs web version
* You can download Outlook for free!

**Short-Cuts**

* Ctrl+N
* Windows Key + D
* Ctrl + Home
* Ctrl + End
* Ctrl + mouse roller
* Ctrl + A
* Ctrl + R
* Ctrl + S
* Ctrl + P
* Ctrl + Z
* Alt + S