**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