

Outlook Tutorial and Recommendations:

We'll cover some tips and tricks for customizing your Outlook and streamlining your email process. All instructions are for Outlook 2016 – if you're running Outlook 2013 or Outlook 2011 for Mac, instructions might be slightly different.

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Paper Pushing

Reduce the amount of time you spend filing and organizing your email.

Create Rules

Automate your work (especially your folder organization), and color-code emails by importance, sender, or category.

- From the **Home** tab, click on **Rules** and then select **Manage Rules & Alerts**.
- To create a new rule, click on **New Rule**, or select an email already in your inbox.

Example 1: Create a Rule from an email already in your inbox.

Create a rule to automatically send emails from me to a specific folder.

- Select the email you want to use to create your rule.
- Click on **Rules** and select **Always Move Messages From: Williamson, Rebecca**
- Choose an existing folder to move the email to, or create a new one. Click **OK**.

Example 2: Create a New Rule without using an existing email.

Create a rule to color-code emails sent only to you.

- **Rules > Manage Rules & Alerts > New Rule**
- Select a template – click on **Apply Rule on Messages I Receive**, click **Next**
- Click **Sent only to me**, and click **Where my name is in the To box**, click **Next**.
- Click **Assign it to the category category**, and in the text below, click on the underlined **category** to select (or create) a category. Click **OK**. Click **Next**.
- Add in any exceptions to the rule, and click **Next**.
- Enter a name for your rule. Choose whether to run the rule now (applies it to messages currently in your inbox) or to turn it on (applies it when new emails arrive but does not apply it to emails currently in your inbox). Click **Finish**.

Use Quick-Steps

One-click for several steps such as “Mark as done and Move email to a folder.”

Outlook has some Quick-Steps already created. *Note that Quick Steps are not available on older versions of Outlook for Mac.*

Example: Create a Quick Step

Create a Quick Step to mark a message as Complete, move it to a specific folder, and email your Manager that the task is complete.

- From the **Home** tab, scroll through the **Quick Steps** and click **Create New**. Enter a name for your Quick Step.
- From the dropdown, select **Mark Complete**, then click **Add Action**.
- From the dropdown, select **Move to Folder**, then select the appropriate folder, or select “Always Ask for Folder”. Then, click **Add Action**.
- From the dropdown, select **Forward**, and then add your Manager’s email address to the **To** field.
 - Click **Show Options** to add CC’s or BCC’s, or to edit the subject or body text.
- You can create a short-cut key for this Quick Step if you’d like. Click **Finish**.

Type Less

Reduce the amount of time you spend typing the same thing over and over again. Give those fingers a break! *Templates and Quick Parts are not available for Mac.*

Templates

Create an email template for messages that you send over and over again.

- Creating a template:
 - Write the body of the email you'd like to save as a template.
 - Click **Save As** and save the email as an **Outlook Template**.
- Using the template:
 - From the **Home** tab, click on **New Items**, select **More Items > Choose Form**.
 - Select **User Templates in File System** and select the appropriate template.
 - Edit the message as necessary – editing the message DOES NOT change the template.

Signatures

Create an email signature to use as a template instead.

- Create a signature:
 - Open a new message, and click on **Signature**. Click on **Signatures**, then **New**.
 - Enter in the text of your email here, and a name to your signature. Click **OK**.
- Using a Signature
 - Open a new message, and click on the body.
 - Click on **Signature** and select the appropriate signature.
 - Edit your message as necessary (DOES NOT change the signature itself).

Quick Parts

Think of Quick Parts as reusable building blocks. If you want to mix-and-match standard parts to easily create a “customized” email, this is for you!

- Create a Quick Part:
 - Open a new message, and type the text you want to create into a Quick Part.
 - From the **Insert** tab, click on **Quick Parts** in the **Text** area.
 - Click **Save Selection to Quick Parts Gallery**, give it a name, assign it a category, etc., and click **OK** when you're done.
- Using a Quick Part:
 - Open an email message and start typing the beginning of the Quick Part. Click **Enter** to insert.
 - Or, from the **Insert** tab, click **Quick Parts** and select the appropriate option.

AutoCorrect

Add in your common typing mistakes, or customize to automatically replace Questrom with Questrom School of Business.

- From **File**, click on **Options**. Select **Mail**. Click **Spelling and AutoCorrect**.
- Click **Proofing**, and then the **AutoCorrect Options** button.
- Under **Replace Text as you Type**, enter in the text you want replaced, as well as what you want Outlook to automatically change it to. Click **Add**, and then **OK**.

Be Less Distracted

Turn off your email notifications (either selectively or wholesale) so you're less distracted when you work. This is also a great idea for your phone and other mobile devices!

Turning off notifications:

- From the **File** menu, click on **Options**, then **Mail**.
- Go to the **Message Arrival** section.
- Uncheck all or some of the notification options.

If you want to be notified when emails arrive from a certain person / group of people, you can always create a rule specific to that person / group.

Turn off notifications on your phone or other mobile device

You likely don't need your phone to buzz every time you get a new email. Maybe you do – I don't know your life.

- You can also turn off repeat notifications. For example, if your phone buzzes when you get a text message and again a few minutes later for the same message, you can turn off that second notification.
- Think about what distracts you from your work – how can you prevent your phone from keeping you from doing whatever it is you need to do?

Color-code Yourself

You already color-code your calendar, so why not do it with your email, too?

Color-coding

Color-coding emails that are sent only to you, or emails that come from certain people / groups gives you quick visual clues about what's in your inbox.

Example 1: Color-code emails sent only to you

Chances are, these are most important, so make them stand out! You can also do this by creating a rule.

- From the **View** tab, click on **View Settings**, and select **Conditional Formatting**.
- Click **Add**, and give your new rule a name such as **Emails to only me**.
- Click **Font** – select a color, font, format, etc., and click **OK**.
- Click **Condition**. Check the box next to **Where I am** and select **the only person on the To line** and click **OK** (multiple times).

Example 2: Color-code emails sent by your boss.

Make sure you know which emails to read first!

- Navigate to the **Conditional Formatting** menu, as above.
- Click **Condition**. Add your boss (or multiple people) to the **From** section.
- Change the **Font** as above.
- Click **OK** enough times to save all your changes.

Search like a Pro

Searching can be a lot more effective using some of the features built into Outlook.

Using Advanced Search Features

Use the Advanced Search to search emails by:

- Folders or subfolders
- Category
- Subject
- Sender
- Attachment
- Time sent
- Field (CC, BCC, To)
- Save your searches if you often look for the same things.

Use Advanced Find

Look for messages, appointments, calendar events, tasks, etc.

- Go to the **Search Tools** tab > **Options**> **Search Tools** > **Advanced Find**

Create a Search Folder

Create a special folder for mail you flag for follow up, mail from specific people, etc. This saves your most common searches so you can find them easily (without re-doing the same search over and over again).

- From the **Folder** tab, click **New Search Folder**.
- Select the type of Search Folder you want to create, or create a custom Search Folder. Click **OK**.
- Your Search Folder will appear in the Navigation Pane.

Keyboard Shortcuts

Use keyboard shortcuts to streamline your workflow.

There are lots of keyboard shortcuts you can use to streamline your workflow in Outlook. Here are links to a few lists of shortcuts:

- Comprehensive list of keyboard shortcuts from Microsoft:
<https://support.office.com/en-us/article/Keyboard-shortcuts-for-Microsoft-Outlook-2013-and-2016-3E1090F6-A616-42DB-ABF5-269CA3D553EE>
- 25 Outlook shortcuts (PDF): <http://cheat-sheets.s3.amazonaws.com/for-mobile/outlook-shortcuts.pdf>
- Keyboard shortcuts to boost productivity: <http://www.makeuseof.com/tag/25-outlook-keyboard-shortcuts-make-productive/>

Other Tips:

Respond When you Want

Write or respond to an email whenever you want, but sent it later.

- Draft your email. On the **Options** tab, click on **Delay Delivery**.
- Under **Delivery Options**, check **Do Not Deliver Before**, and set the date/time you want your email to be sent. Click **Close**.

Change the Subject Line of an Email you Receive

This helps with your filing / organization, especially if you have apply rules or color-coding to your emails.

- Open the desired message, and click to edit the subject. If that doesn't work:
 - From the **Move** section, click on **Actions** and then **Edit Message**.
- Make your edits, and close the email – make sure to save your changes!

Save Important Emails

Save important emails for posterity and to get them out of your mailbox.

- Click on the appropriate email, and drag and drop it to your desktop or wherever you'd like to save it.

Add a Second Time Zone to your Calendar

This is great if you do a lot of collaboration with people across multiple time zones.

- **File > Options > Calendar > Time Zones > Show a Second Time Zone**

Housekeeping:

Customizing your Outlook is quick and means you'll never have to be distracted by options you don't need.

Customize Outlook

As with all Microsoft Office products, you can customize the buttons and tabs that appear on your ribbon.

- From the **File** tab, select **Options**, then **Customize Ribbon**
- Here, you can choose which commands to show on the Ribbon, and where. You can add a new tab or group, or remove features that you don't use.
- Click **OK** when you're done.

Customize your View

Customize how your inbox looks to use all available space and reduce distractions.

- From the **View** tab, select **Change View** and select the view you prefer.
- Use the **Layout** features on the ribbon to adjust your Panes.
- Select **View Settings** to change settings. Adjust column widths by clicking and dragging on the column dividers.
- Save your view by going back to **Change View** and click **Save Current View as New View**.