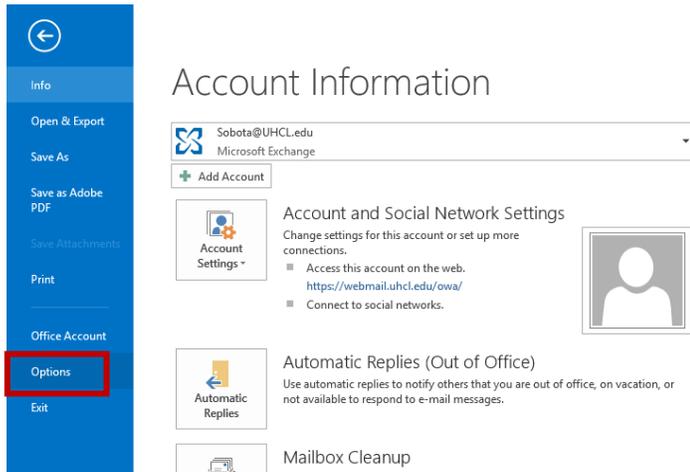


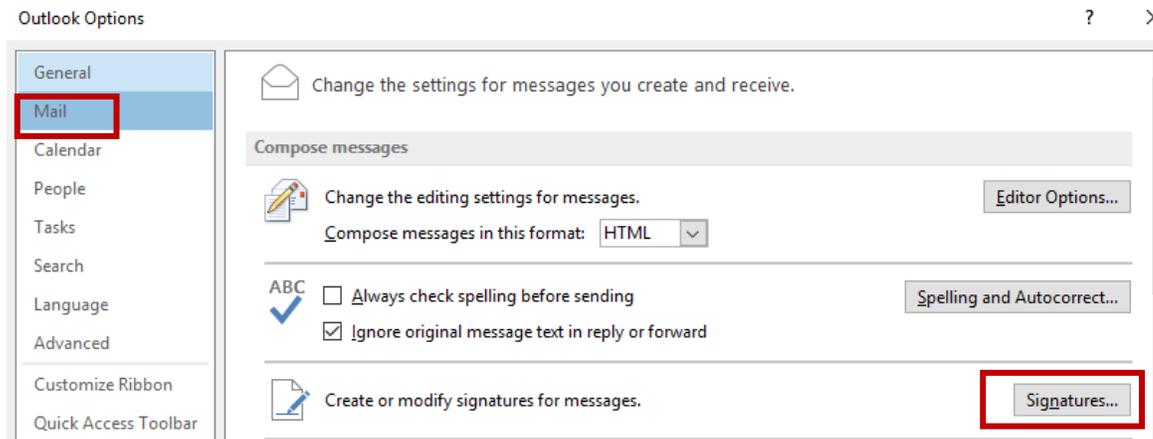
Microsoft Outlook Tips and Tricks

Signatures

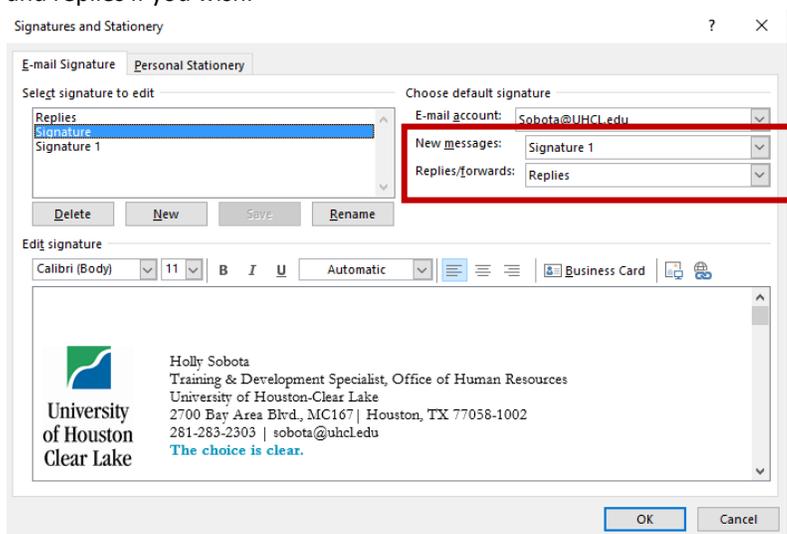
1. Click on "File" at the top left and click "Options" on the left side menu.



2. Click on "Mail" on the left and then click on the "Signatures" button.



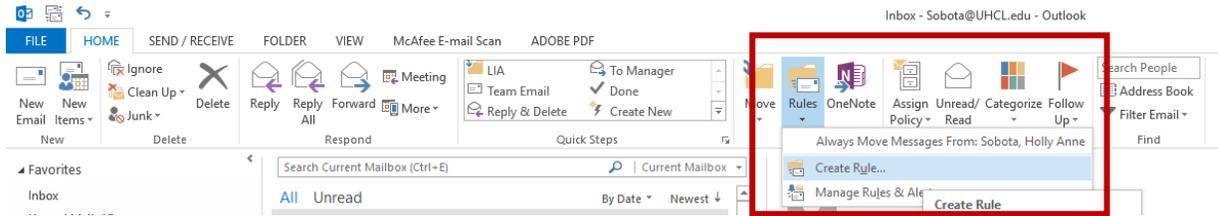
3. Create your signature as fits you within our brand guidelines. You can have separate signatures default for new messages and replies if you wish.



RULES

“Rules” are a function of Outlook where it can essentially organize your inbox for you.

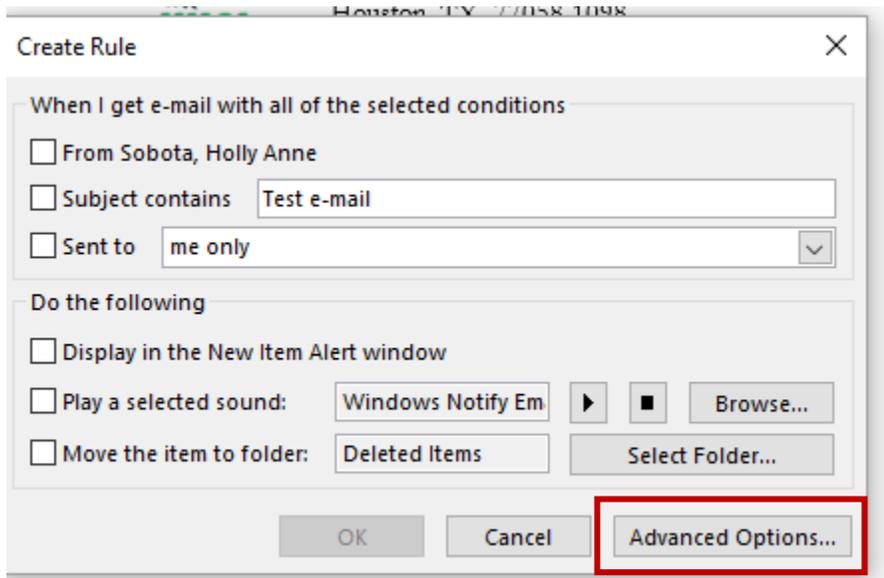
1. When you open your inbox, click on “Rules” on the top. Select “Create Rule.”



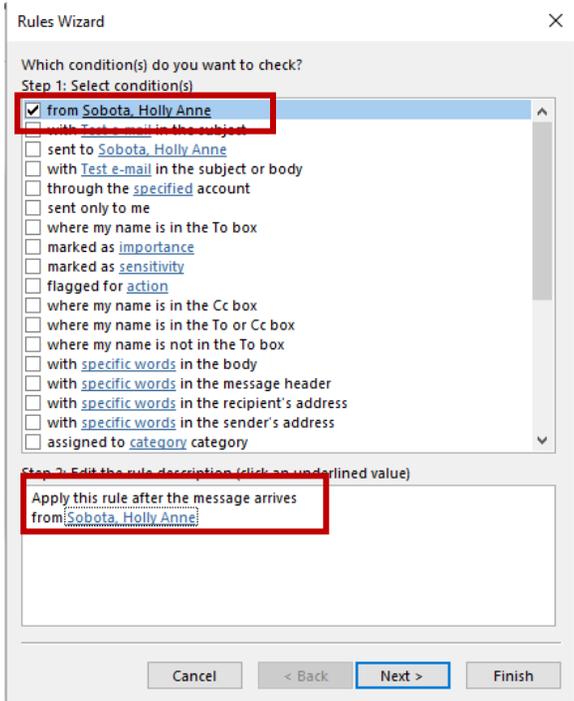
There are many “rules” you can set. You are telling the program that you want it to take certain actions based on different criteria.

Example: “I want Outlook to delete every e-mail from Holly Sobota so I don’t have to see them.”

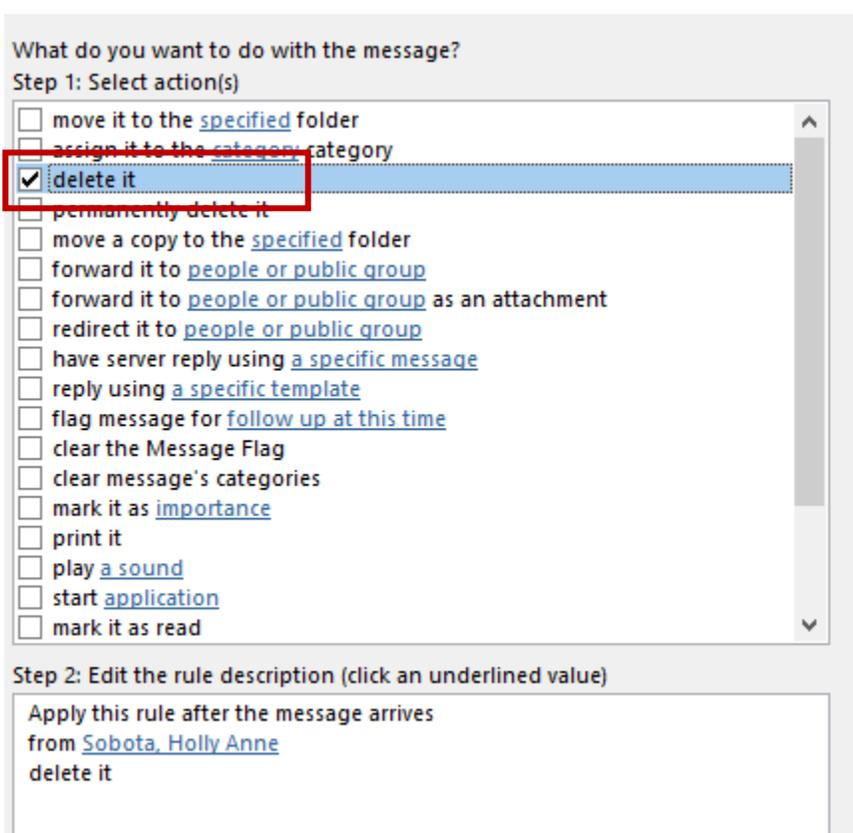
2. A box will pop up with some default options based on the e-mail you have currently selected. If you want to use what is in the default box, that is fine. We, however, will click on “Advanced options.”



3. Now you must decide which e-mails you want to do something with. Is it all e-mails **from a certain person? With a certain subject? With a certain title in the subject?** This is up to you. Back to our example – deleting all e-mails from Holly Sobota:
- 3a. Click on “From.” At the bottom of the box in “Step 2”, it will show the rule with the auto populated name or address.
- 3b. Click on the address in the “Step 2” box and you can search for the person or enter an e-mail address.
- 3c. Click “Next.”



4. I am going to tell it to delete all messages from Holly Sobota. You can do a million things with your messages – delete them, save them to a certain folder, mark them important, etc. Take some time to read through all the options. Check your item, and then if you are moving it to a certain folder, make sure to address which folder in the “Step 2” box. Click “Next.”



5. Here you can enter exceptions, if you want any. I will not make any exceptions, so I will just click “Next.”

Are there any exceptions?

Step 1: Select exception(s) (if necessary)

- except if from people or public group
- except if the subject contains specific words
- except through the specified account
- except if sent only to me
- except where my name is in the To box
- except if it is marked as importance
- except if it is marked as sensitivity
- except if it is flagged for action
- except where my name is in the Cc box
- except if my name is in the To or Cc box
- except where my name is not in the To box
- except if sent to people or public group
- except if the body contains specific words
- except if the subject or body contains specific words
- except if the message header contains specific words
- except with specific words in the recipient's address
- except with specific words in the sender's address
- except if assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from Sobota, Holly Anne
delete it

Cancel < Back **Next >** Finish

6. Lastly, it will ask you if you would like it to go back and sort all the items in your current inbox based on what you have put in your rules. If you would like it to do so, check the box. Click “Finish.”

Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

Sobota, Holly Anne

Step 2: Setup rule options

- Run this rule now on messages already in "Inbox"
- Turn on this rule
- Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
from Sobota, Holly Anne
delete it

Cancel < Back Next > **Finish**

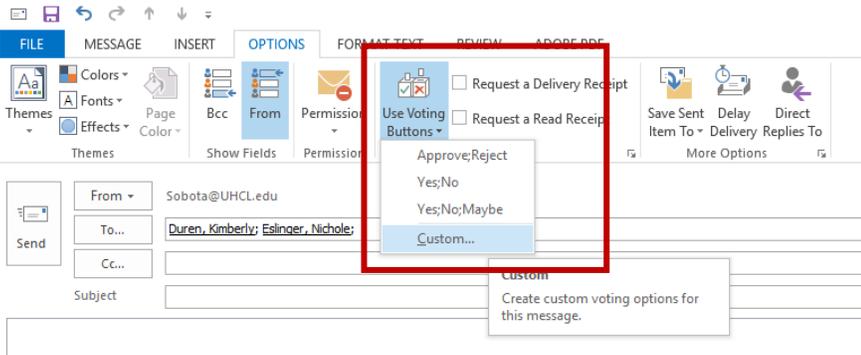
E-mail Message tools

There are many buttons that can help you achieve various tasks. Here are a few:

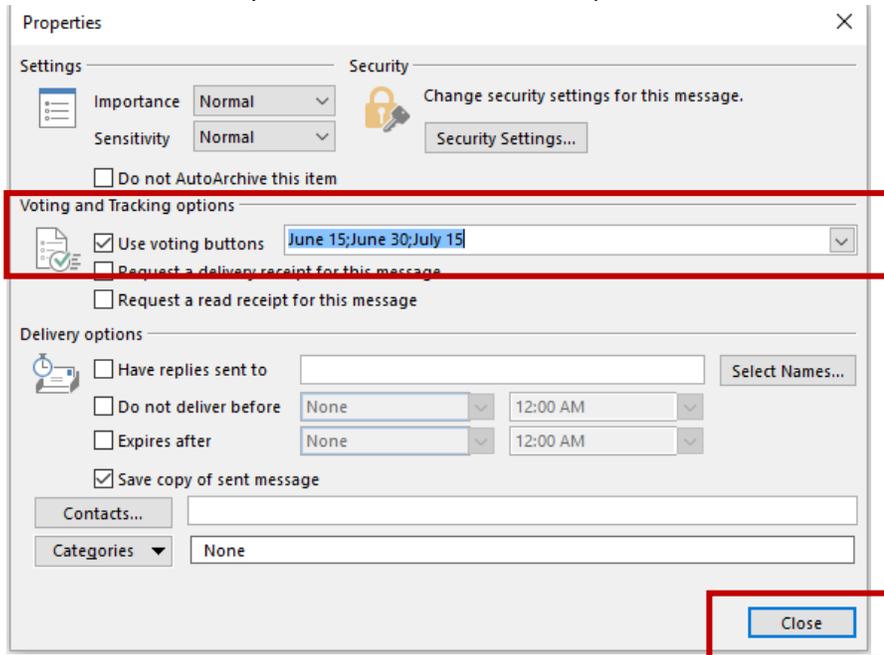
A. Voting

This function allows you to gain opinions, or “votes” from people on the message. Typical uses are: a team choosing a date for a meeting or function, choosing lunch items, etc.

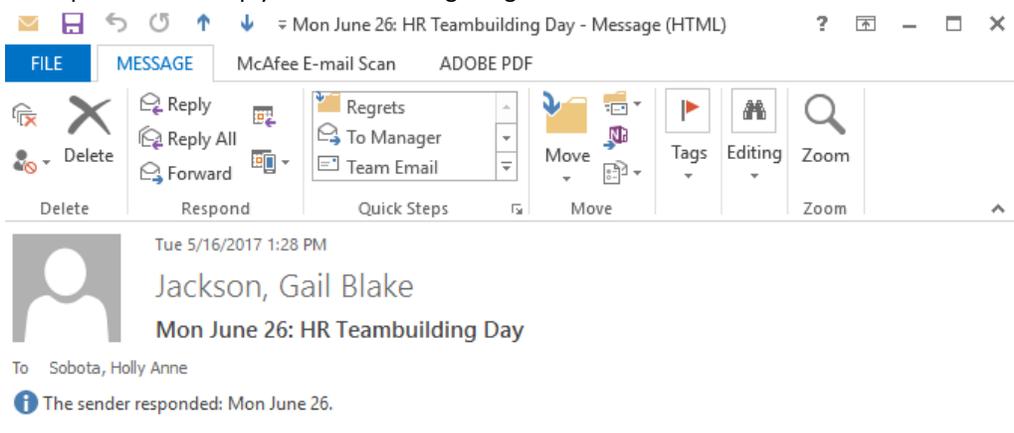
- I. When you click on “Use Voting Buttons,” a few pre-populated options pop up. If you want people to vote on something specific, click “Custom.”



- II. Enter the items you wish to receive votes on, separated with semicolons and click “Close.”

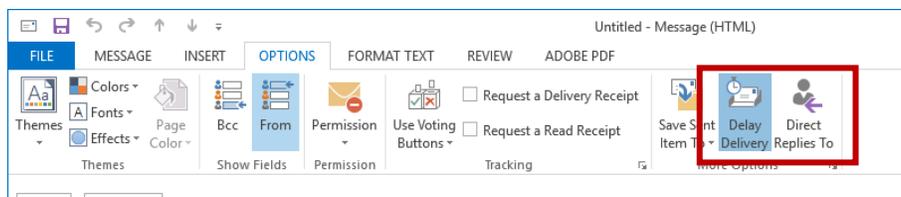


- III. A sample of what a reply from the message might look like:

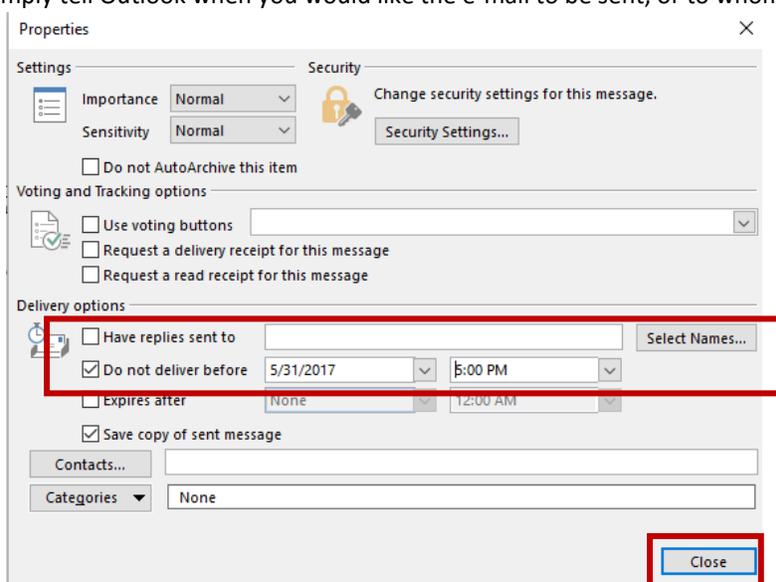


B. Delay Delivery & Direct Replies

If you would like a message sent at a certain time (not right now), you can tell Outlook to send messages in the future for you. (for instance, if you are sending multiple e-mails and want everyone to receive them at once.) You can also tell Outlook to send the replies from that message to someone else – say, if you are going on vacation and would like them directed to a team member.



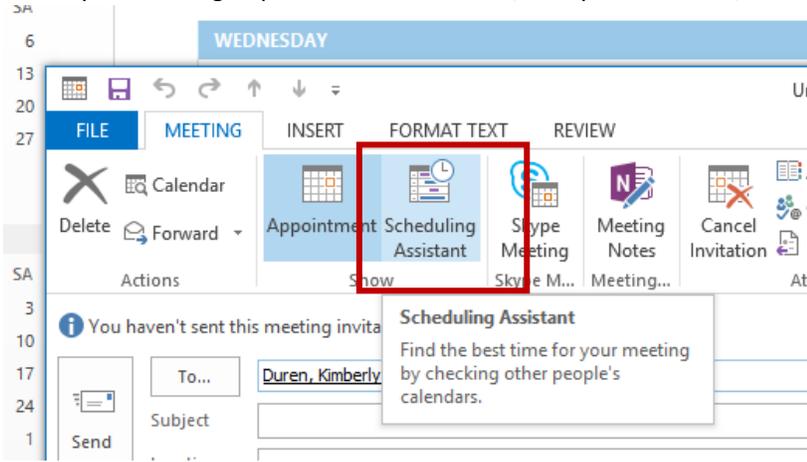
- I. Simply tell Outlook when you would like the e-mail to be sent, or to whom, and click “Close.”



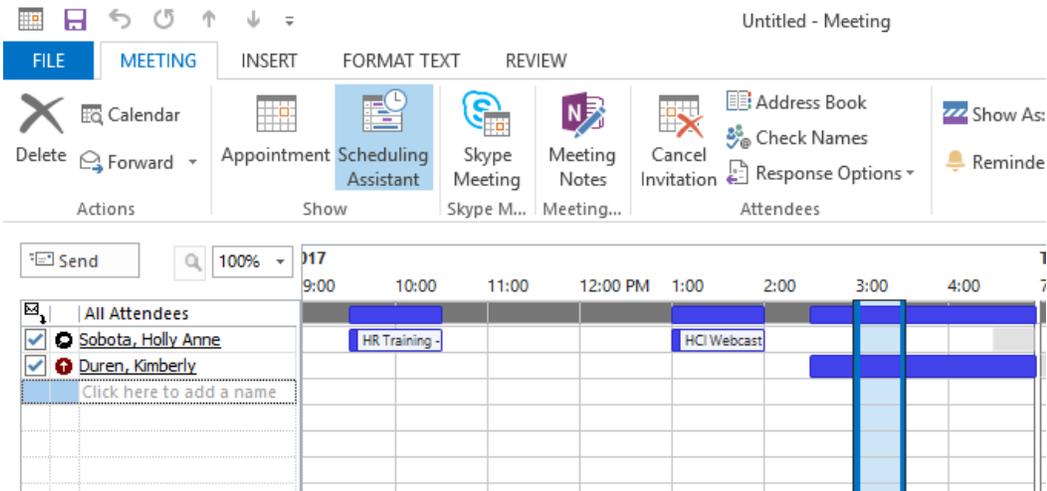
Calendars

A. Viewing whether or not someone else is available

Create your meeting request based on the date/time you would like, and click "Scheduling Assistant."



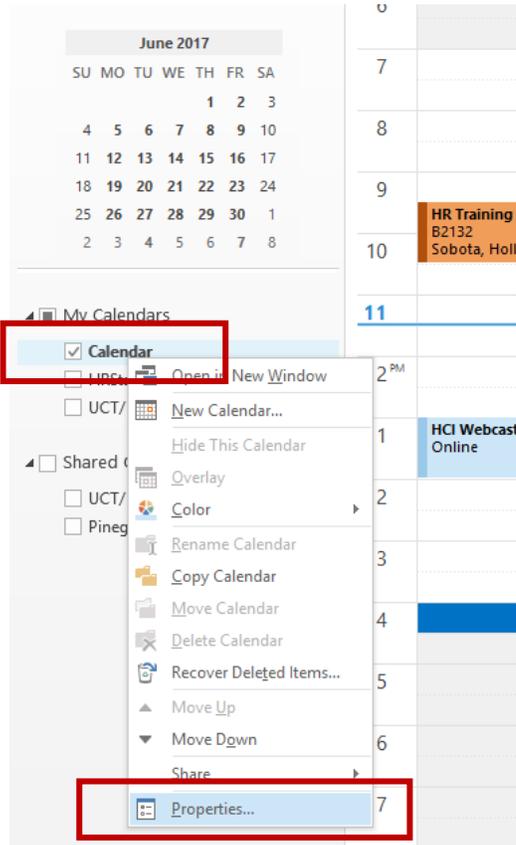
Any white time is available – anything with blue, purple, or shaded boxes is already booked.



B. Granting Calendar Permissions

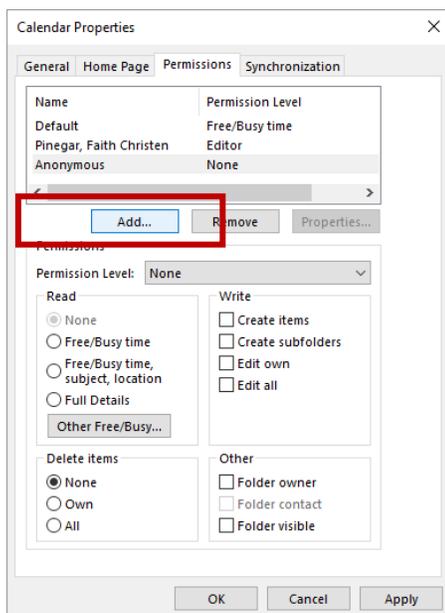
You have the ability to allow others to see more than just busy/free time on your calendar if you wish. For instance – assistants, managers, team members, etc.

- I. On the left side of your calendar view, right click on “Calendar.” Click “Properties.”



From here, you can create a custom view for anyone you like, and dictate whether they can view certain items, add/delete, etc.

- II. Click “Add” and select the person you want from the address list.



- III. Now you can select whichever items you would like to give them ability on. Do you want them to see the full calendar detail? Can they delete items for you? Etc. Make your selections and click “Ok.”

Name	Permission Level
Default	Free/Busy time
Pinegar, Faith Christen	Editor
Anonymous	None

< >

Add... Remove Properties...

Permissions

Permission Level: **None** v

Read

None

Free/Busy time

Free/Busy time, subject, location

Full Details

Other Free/Busy...

Write

Create items

Create subfolders

Edit own

Edit all

Delete items

None

Own

All

Other

Folder owner

Folder contact

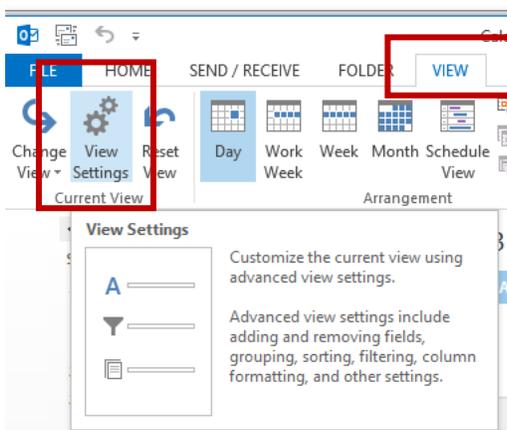
Folder visible

OK Cancel Apply

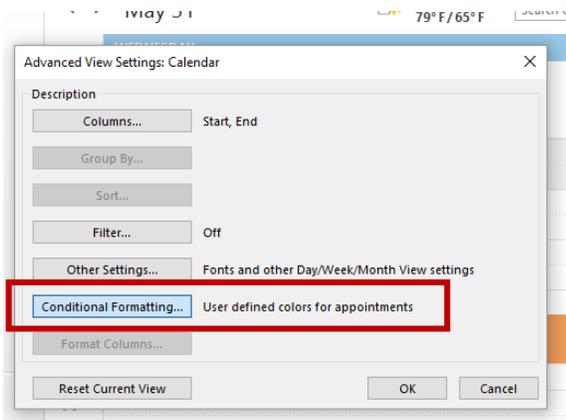
C. Color Coding certain items in the Calendar

If you want to highlight certain items in the calendar, you can color-code them. For example – if you want to highlight the HR trainings you are coming to, or department meetings, or invites from your supervisor, you can have it set so that they will automatically do that every time.

- I. In the calendar, click “View” and “View Settings.”



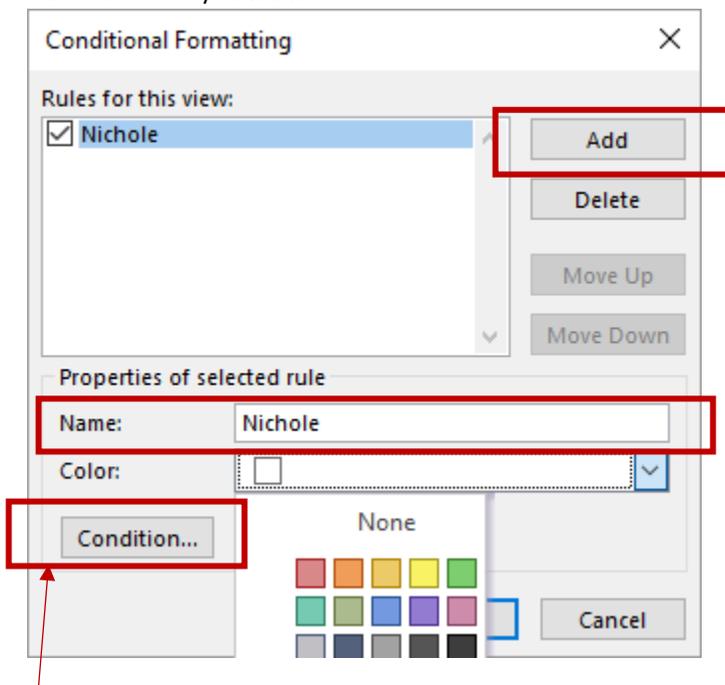
II. Select "Conditional Formatting."



III. Click "Add."

IV. New items will pop up – instead of "Untitled" you can name it if you wish – such as "Nichole" if I want to color code meetings from my supervisor.

V. Select the color you wish.



VI. Click "Condition."

We are going to tell Outlook what to look for when color coding.

You can tell it to color code items from a certain person, or if the invitation has certain words in the title, etc. Enter the categories you would like it to color code and click "Ok."

