Email and Calendar Management

Course objectives:

- Setting up rules to sort email
- Filtering
- Flagging
- Using your calendar effectively

Student Training and Support

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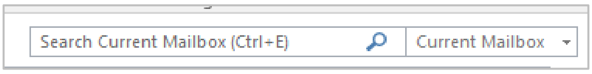
Email management tips

- 5 folder inbox system:
  - Inbox – holding pen to be sorted
  - Today – emails that need a response today
  - This week – email that need a response before the weekend
  - This month – emails that need a longer response or waiting for more information
- Create folder called ‘Respond by Wednesday’ and move emails in there that you want to respond to later
- If you can respond in under one minute, do it. Right now! Otherwise flag it for later
- Create email templates for responses you send a lot of
- Set quick actions
- Set up rules that move emails and mark them as read
- Set a recurring appointment in calendar each week to dedicate to email management

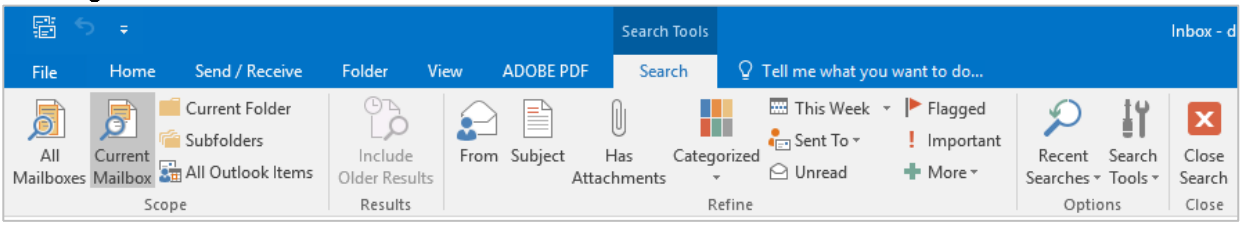
Exercise 1. ***Searching emails***

Locating emails in a crowded inbox is made simple using these search tips…

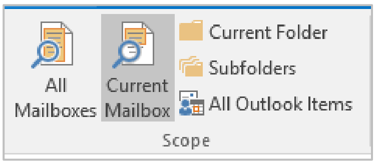
The search area is in the top right of the Outlook window



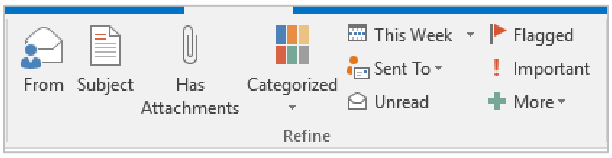
Clicking in the search area activates the Search toolbar



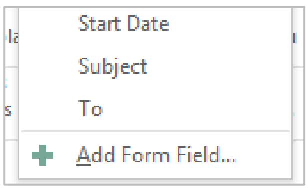
The **Scope** group controls the part of Outlook being searched



The **Refine** group controls what is being searched for



The **More** button in the Refine group allows you to search through many more email properties

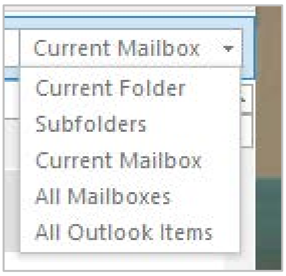


It is possible to search directly in the search area using the correct search parameters

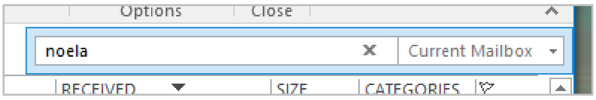
Notes

Use the drop down list to search:

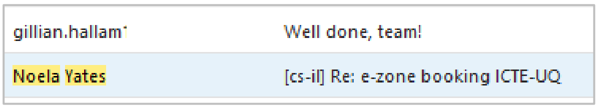
- Current Folder
- Subfolders (of the current folder)
- Current Mailbox
- All Mailboxes (if your Outlook is setup to view multiple accounts)
- All Outlook Items (to search Mail, Calendar, People and Tasks)



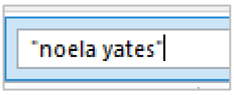
Click in the **Search area**
Enter a search term e.g. the name of your manager
This will locate items containing that name (Not case sensitive)



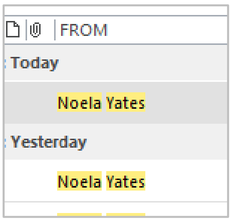
Enter their full name
Locates both names but not necessarily in that order
Results can be in address, subject or body



Enter their full name in quotation marks
Locates the exact phrase

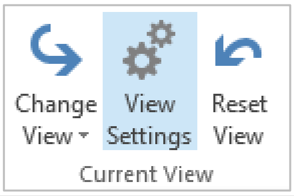


Enter your managers name preceded by From:
e.g.From:Noela Yates
Locates emails sent by that person

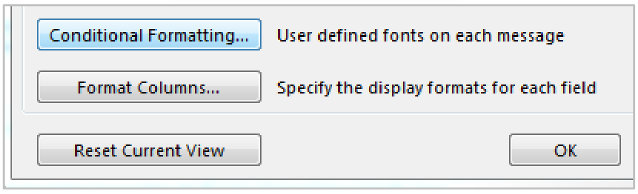


Exercise 2. ***Colour code incoming emails***

It is possible to use conditional formatting to colour code incoming correspondence.

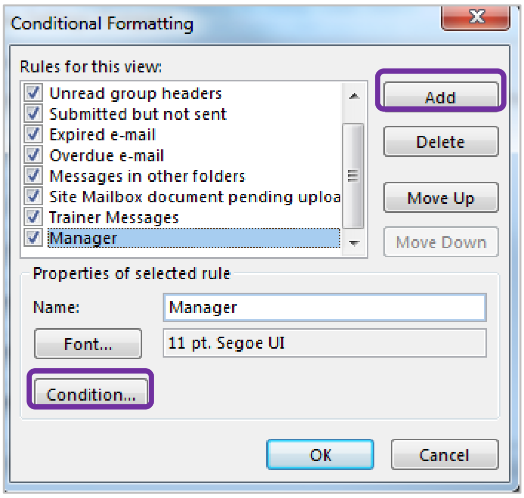


1. Click the **View** tab
2. Click **View Settings**
3. Click **Conditional Formatting**

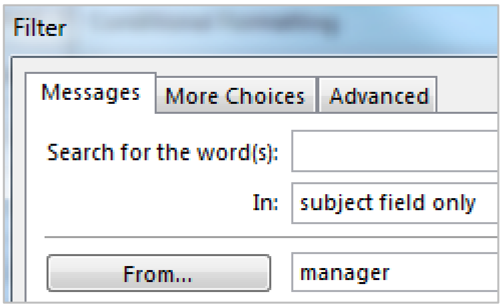


Notes

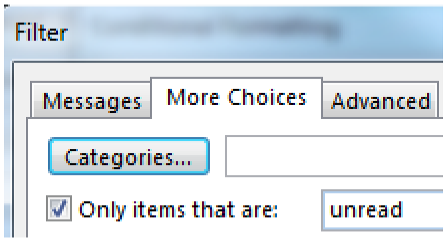
4. Click **Add**
5. Type **Manager** in the Name field
6. Click the **Condition** button



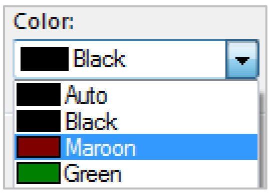
7. Click the **From…** button
8. Search and select your manager's name from the address book then click **OK**



9. Click the **More Choices** tab
10. Check the **Only items that are**: checkbox
11. Set the list item to **unread**
12. Click **OK**



13. Click the **Font** button
14. Choose a font colour
15. Click **OK**
16. Click **OK** to confirm the new condition
17. Click **OK** to confirm the view change



Until you receive a new email from your manager or mark an email as unread no emails will be highlighted according to this rule.

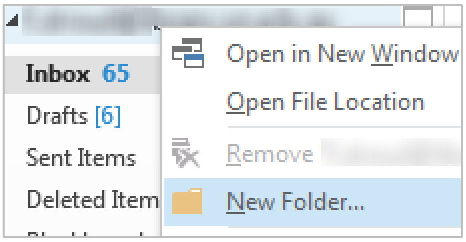
Notes

Exercise 3. ***Filing your emails***

Filing with quick steps

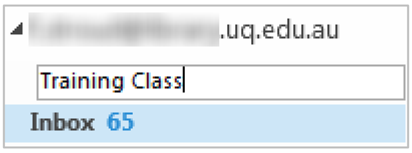
Create new folder

1. Right click your **mailbox** in the Navigation Bar
2. Select **New Folder…**



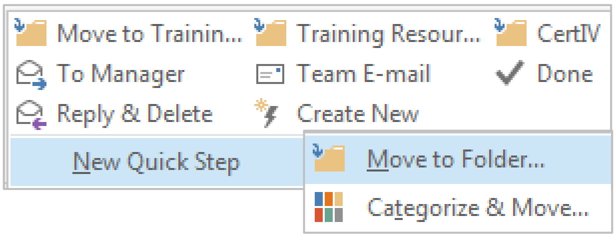
3. Type the name '**Training Class**'
4. Press **Enter** on keyboard

Folder will be placed in alphabetical order with current folders in mailbox

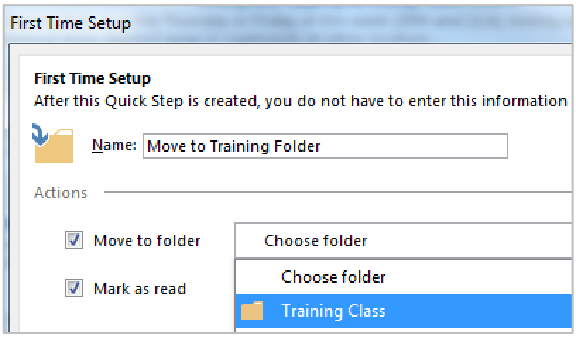


Quick step – move to folder

1. Click the **More** button in **Quick Steps** group
2. Select **New Quick Step** > **Move to Folder…** in the **Quick Steps** group on the **Home** tab



3. Enter the name '**Move to Training Folder**'
4. Select the **Training Class** folder
5. Click **Finish**

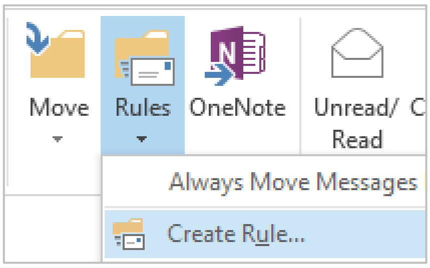


6. Select the **Timesheet Reminder** email
7. Click on the new quick step '**Move to Training folder**'

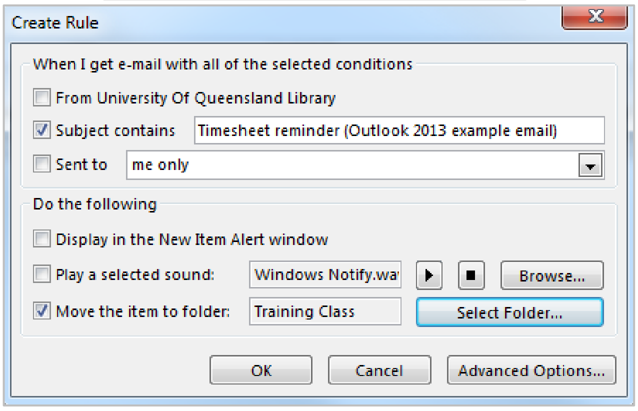
Filing with email rules

Rules can be setup to file or delete emails as they arrive, for example, when you receive: automated reminders from enterprise systems, emails about staff absences or irrelevant emails from mailing lists.

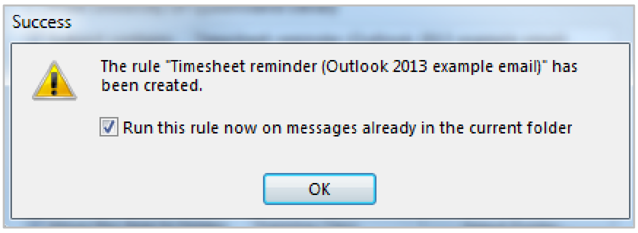
Notes



1. Go to **Training Class** folder
2. Select the **Timesheet reminder** email
3. Click **Rules** button in **Move** group
4. Select **Create Rule…**



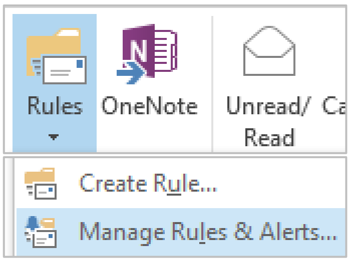
5. Check **Subject contains…** button
6. Check **Move the item to folder**
7. Click **Select folder…** button
8. Select **Training Class** folder
9. Click on **OK** to confirm folder
10. Click **OK** to confirm rule settings



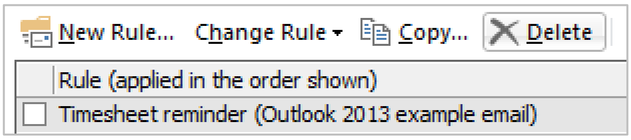
11. Check '**Run this rule now**'
12. Click **OK**

Check the Training class folder to ensure the messages moved are as intended

View, edit and delete rules



1. Click the **Rules** button > **Manage Rules & Alerts…**



- Clear tick alongside rule to switch it off
- Click on Delete button to remove rule

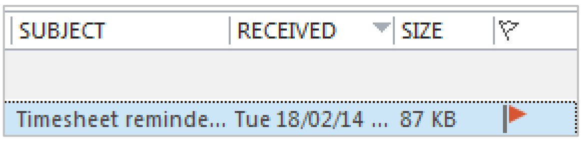
Exercise 4. ***Applying flags and categories***

Email flags

Use flags as a follow up reminder

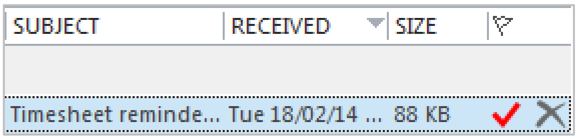
- Left click the **Flag** icon on any email

Flagged emails are automatically listed as To-Do items in Tasks.

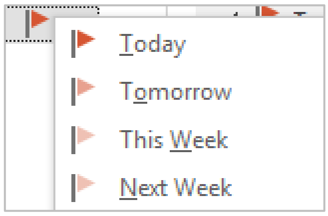


Notes

- Left click again to indicate complete



- Right click the **Flag** icon on any email for specific timeframes or to schedule a reminder



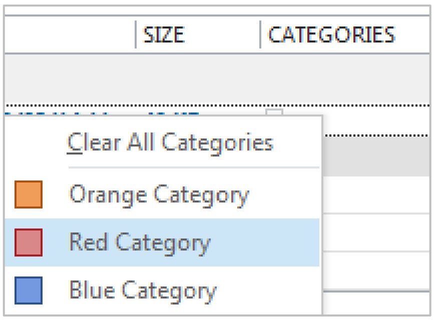
Categories

Establishing categories for managing mail will only apply to your own account. Other users will be able to define and apply their own account

Apply categories

1. Right click in **CATEGORIES** section to access category menu
2. Click on a category to apply

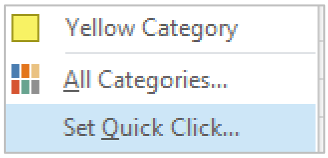
This can be repeated to apply multiple categories.

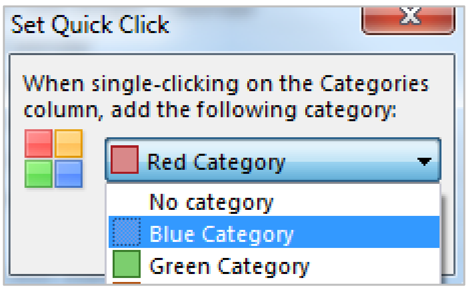


Apply a category with one click

1. Right click in **CATEGORIES** section to access category menu
2. Select the **'Set Quick Click…'**
3. Choose a category to be applied
4. Click **OK**
5. Left click on an email in the Categories section

The defined category will be applied to selected messages





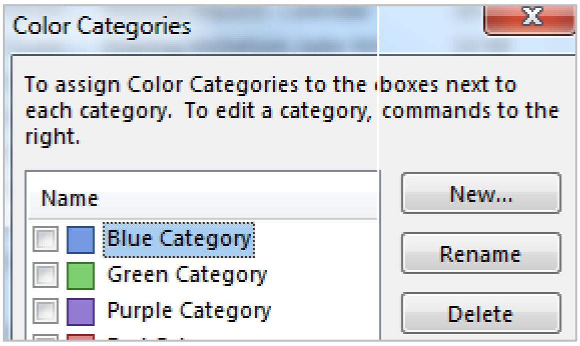
Notes

Customise Categories

1. Right click an email > **All Categories**

OR

- Click the **Categorize** tool in the **Tags** group on the **Home** tab
- Select **Rename** or create **New** categories as required



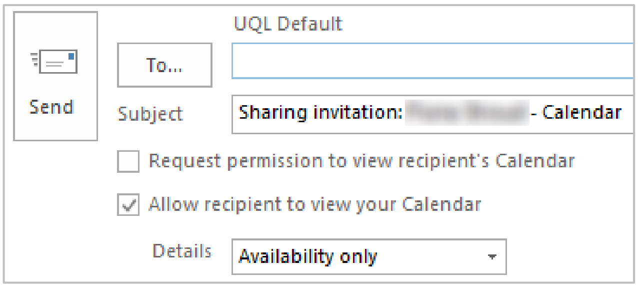
Notes

The Outlook Calendar

Exercise 5. ***Share your calendar***

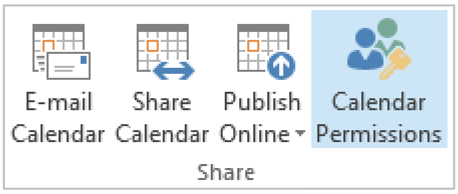
1. Go to **Calendar** section of **Outlook**
2. Click **Share Calendar** in the **Share** group

3. Choose recipients
4. Check **Request Permission to view recipient's calendar** if appropriate
5. Click **Send**

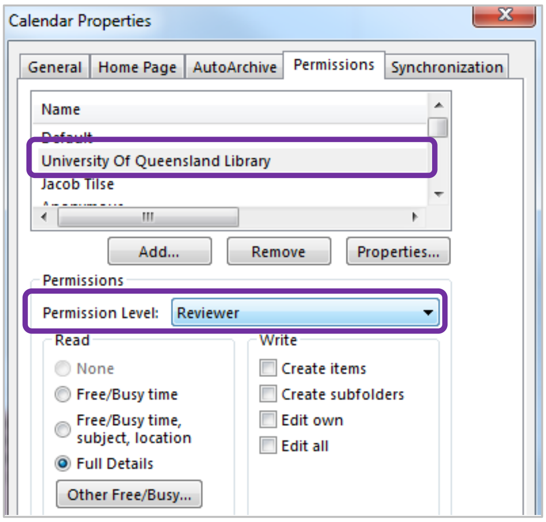


Customise sharing permissions

1. Click **Calendar Permissions** on the **Share** group



2. Select the staff member and update their permissions as required
3. Click on **OK**

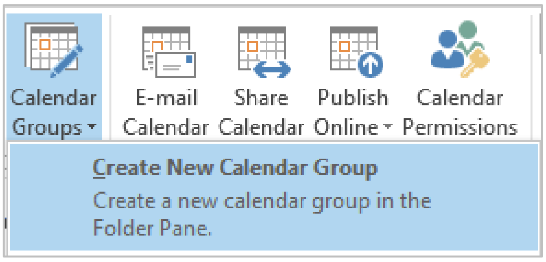


Sharing your calendar enables Read permissions only. You will be required to customise the Write and Delete permissions as required.

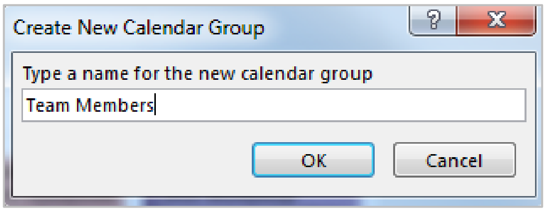
Notes

Exercise 6. ***Group shared calendars***

1. Click **Calendar Groups** > **Create New Calendar Group**

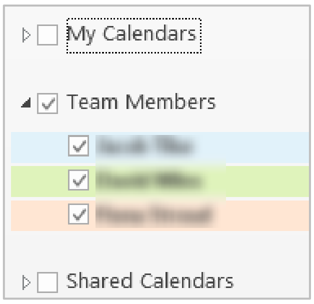


2. Enter a group name and click **OK**



3. Add group members and click **OK**

The group will appear in the navigation bar. Calendars can be turned on and off as required



Appointments and meetings

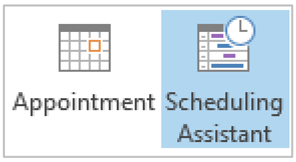
Appointments and meetings are similar in Outlook, with one main difference: meetings have attendees, and generate invitations, appointments do not.

Exercise 7. ***Schedule a meeting***

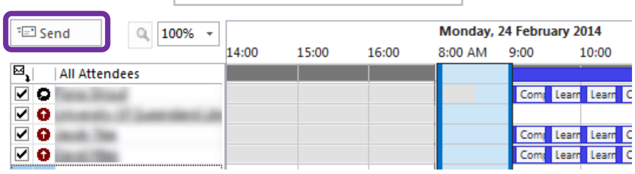
1. Home Tab > Inbox > select any email.
2. Click the **Meeting** button in the **Respond** group

When you click Send – meeting invitations will be sent out to recipients.

3. Click the **Scheduling Assistant** button



4. Add recipients
5. Select a date and time, based on the displayed availability
6. Click on **Send**

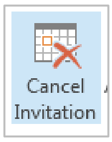


Notes

Converting appointments and meetings

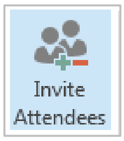
Convert meeting to appointment

- Click **Cancel Invitation**



Convert appointment to meeting

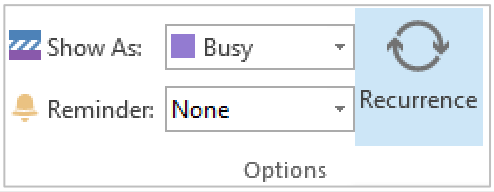
- Click **Invite Attendees**



Recurring appointments

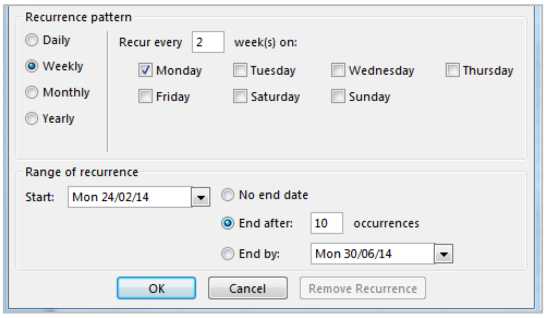
When setting up a meeting:

1. Click the **Recurrence** button in the **Options** group



2. Select recurrence options including frequency and an end date
3. Click **OK**

This offers an invitation to recipients to a series of meetings which will be entered into their calendar.

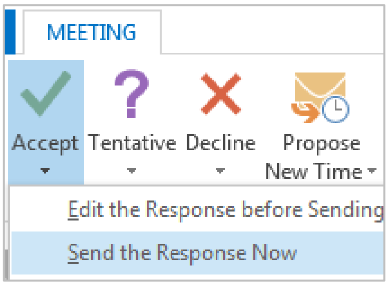


Exercise 8. ***Respond to meeting invitations***

An Outlook meeting invitation is an enhanced email with Yes, Tentative and No buttons on it. It is good practice to answer these invitations and to have Outlook send a response. This ensures that meeting convenors are aware of attendance and can reschedule if necessary.

Click the email invitation:

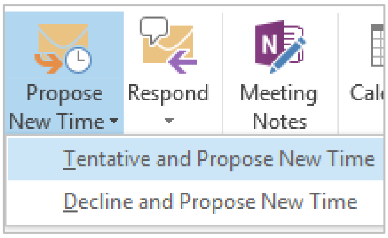
1. Click one of the attendance options: **Accept/Tentative/Decline**
2. Choose the **Send the Response Now** option



OR

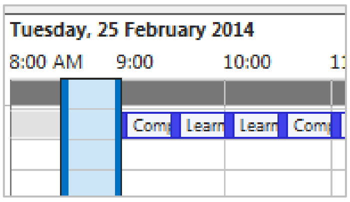
- Click **Propose New Time** with a provisional Tentative or Negative response

If your proposed time is accepted, you then become responsible for the meeting.



Notes

- Alter the start and end times and click **Propose Time**



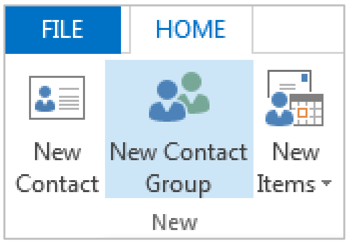
People

Contacts can be found by clicking the People heading. Contacts can be updated or have notes recorded against them. They can be added to email distribution lists and organised in Contact Folders and the folders into Folder Groups.

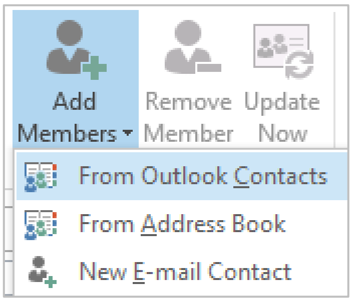
Exercise 9. ***Create a contact group***

A contact group is an email distribution list you can access from any of the address fields when creating an email or meeting.

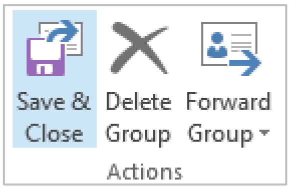
1. Click **New Contact Group**



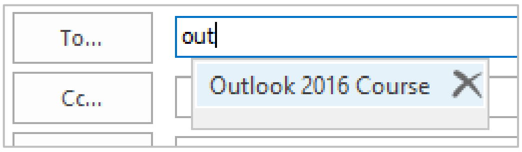
2. Enter the name ‘**Outlook 2016 Course**’
3. Click **Add Members** > **From Outlook Contacts**



4. Select contacts as appropriate
5. Click **Save & Close**



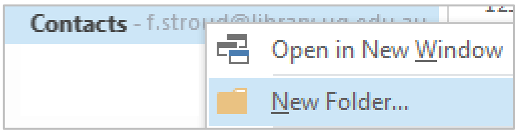
This group will now be available via autocomplete when you start typing a recipient when sending an email.



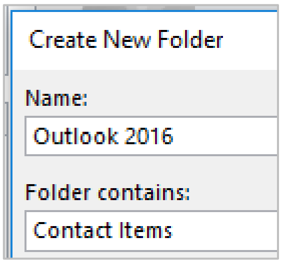
Notes

Exercise 10. ***Create a contacts folder***

Contact folders hold individual and groups of related contacts.



1. In the Navigation Bar right click on the **Contacts** folder
2. Click **New Folder…**

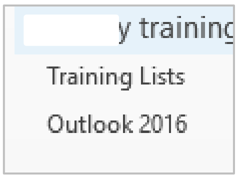


3. Type in the name: '**Outlook 2016**'
4. Select the **Contacts** folder

Ensure a subfolder isn't selected

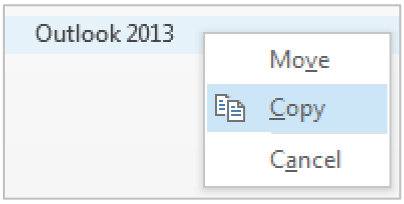
5. Click **OK**

Populate folder with contacts



1. Select the Contacts folder
2. Locate existing contacts and contact groups

Changing the **Current View** to **List** may speed this process.

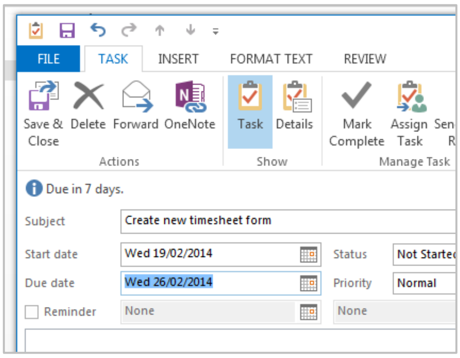


3. Hold down the right mouse button over a contact and drag and drop it into the '**Outlook 2016**' folder
4. Click the **Copy** menu option

Tasks

The Tasks section contains basic functionality for creating, assigning and tracking progress of activities. Its primary benefit is its integration with Outlook. Emails that have been flagged will appear in the To-Do List in the Tasks section.

Exercise 11. ***Create a task***

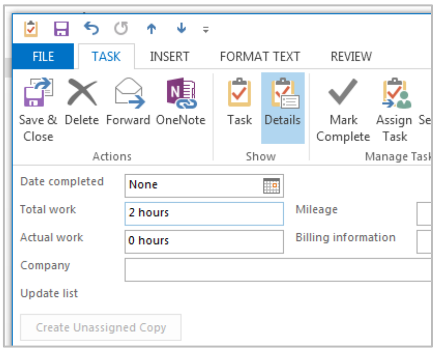


In the Tasks section:

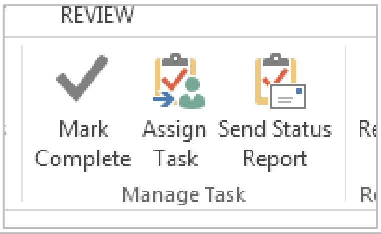
1. Click **New Task**
2. In the Subject field, type: '**Create new timesheet form**'
3. Set the start date as today and the finish date **one week from today**

Notes

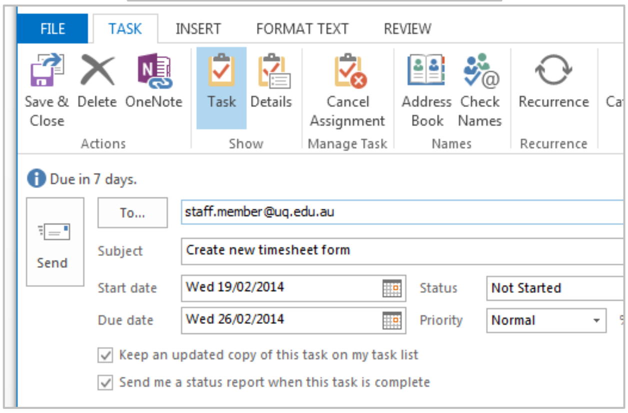
4. Click **Details** in the **Show** group
5. Add ‘**2 hours**’ to the **Total work**: field
6. You can now save this task for completion or assign it to someone.



Exercise 12. ***Assign the task***



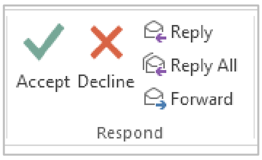
1. Click **Assign Task** in the **Manage Task** group
2. Add a recipient
3. Add any relevant details
4. Click **Send**

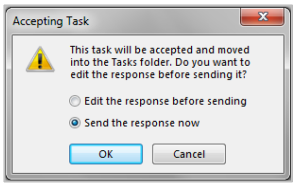


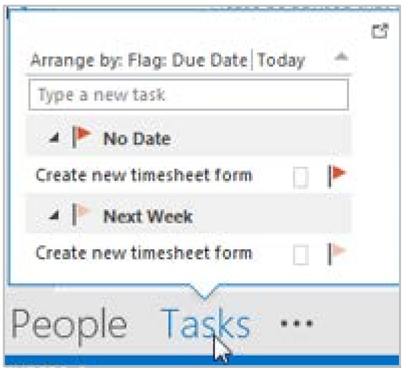
Completing an assigned task

In the Mail section when a task assignment arrives:

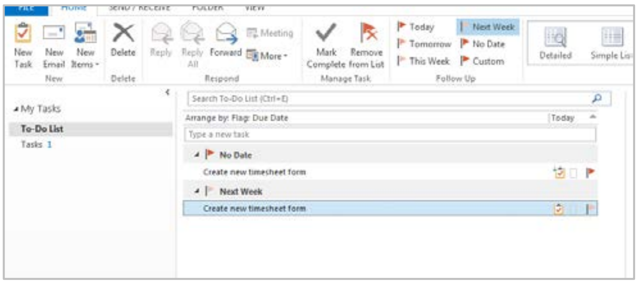
1. Click **Accept** or **decline** as appropriate.
2. Either send a custom response or simply an automated acceptance or rejection notification
3. Hover on Tasks at the bottom to see a quick view of your tasks



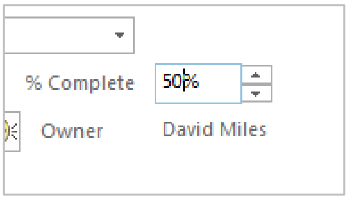


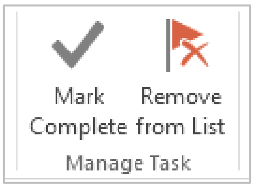


Notes



4. Go to the **Tasks** section and click the **Tasks** list:
5. Double click the **Task** to update it including **% complete**
6. Click **Mark Complete** when the task is completed



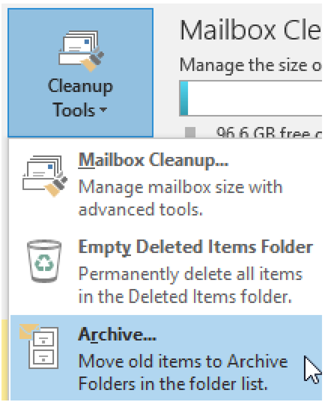


Exercise 13. ***Archiving emails***

Archiving is different to exporting emails. Archiving will move emails out of your account to a file that can be stored on your computer, to import later if needed. For example you can archive emails from last year and call on them if required.

How to archive

1. Go to **File**
2. Click **Cleanup Tools**
3. Select **Archive**

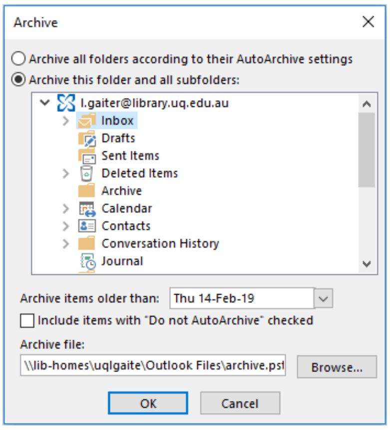


Notes

4. Set a date that you want to archive from

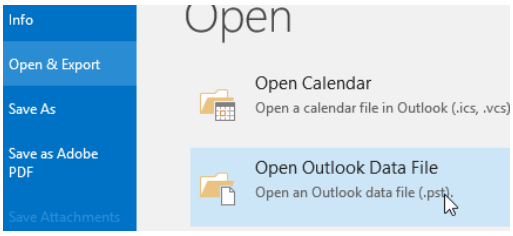
This will remove ALL emails in the selected area older than that date

5. Then select a location to save the file by clicking **Browse**
6. Click **OK**



How to restore archived emails

1. Go to **File**
2. Click **Open & Export**
3. Select **Open Outlook Data File**



4. Locate the archive file on your computer that you wish to restore
5. Click **OK**

Notes