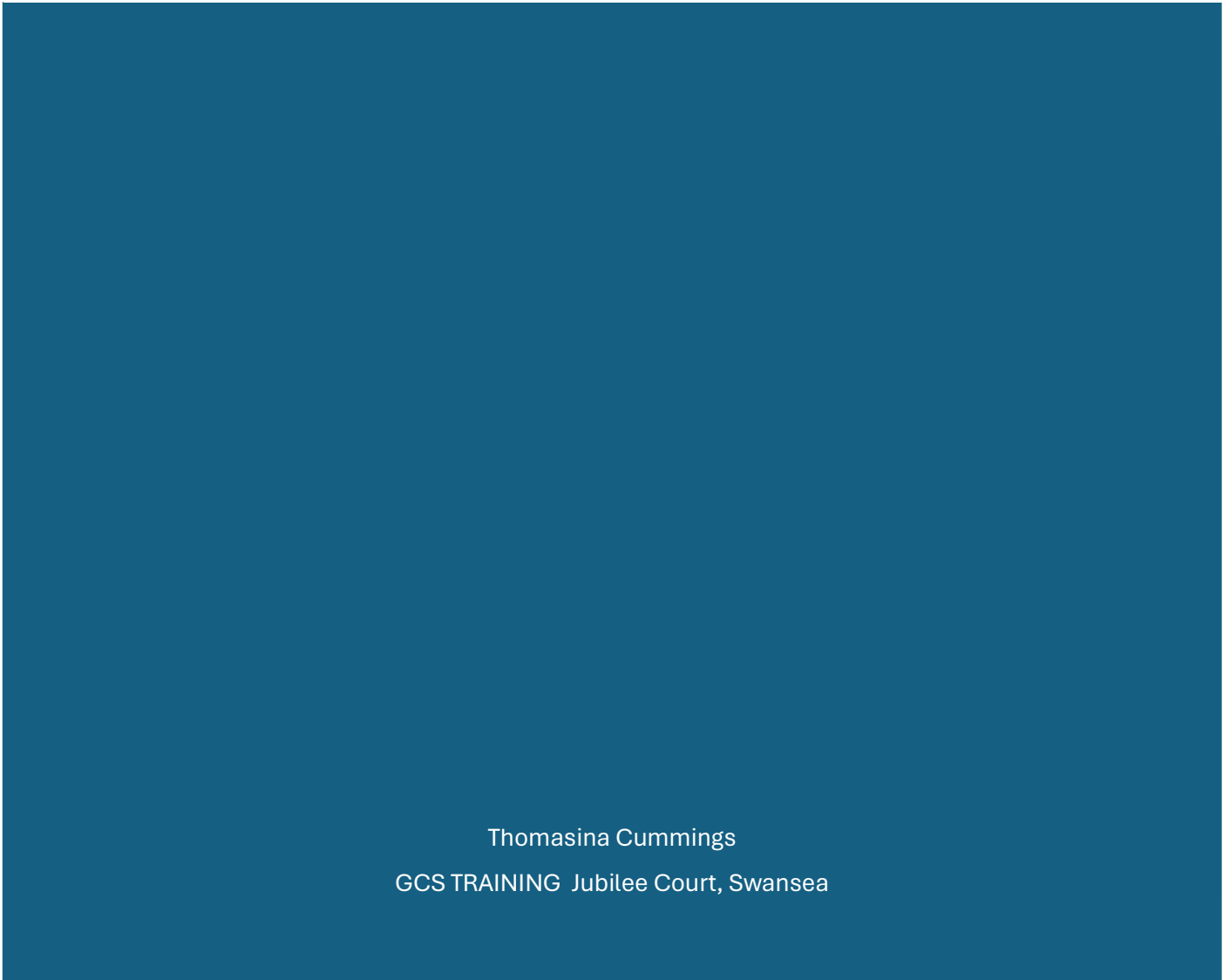




# PRODUCTIVITY AND TIME MANAGEMENT - OUTLOOK

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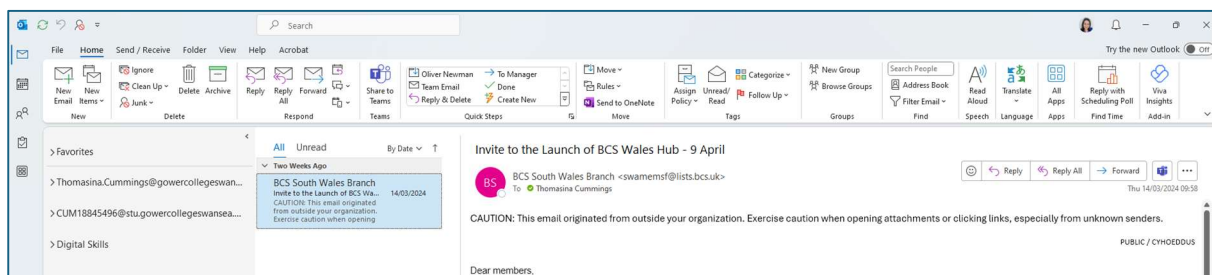


## Basic Principles

Although you won't always be able to control what software others use, you will find you can become more efficient if you choose a system and stick to it. This will reduce the number of sources you need to check for information, be less time consuming and reduce the risk of losing key information.

## Setting up Outlook

To get the most out of Outlook, you should ensure you have it set up in the best way possible.



## Areas of significance:

**Tabs** – File, Home, Send/Receive, Folder, View, Help. Each tab opens a related ribbon with buttons and options.

**Ribbon** – The ribbon contains all the related features for a tab. There will be shortcuts that can be taken, and many times there will be more than one way to achieve an action but, for advanced users, the ribbon will contain a more comprehensive set of options.

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**Note:** Outlook can be one of the harder pieces of Office software to master due to the number of ribbons that it contains. Each navigational move you make, will present you with a different ribbon, and beginners can often get confused as to where to find things.

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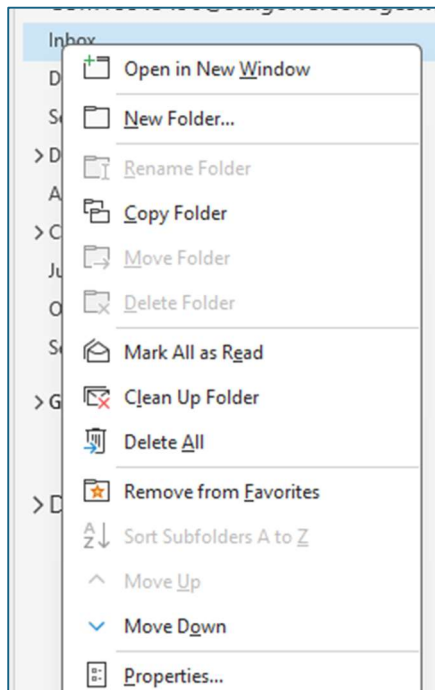
**Quick Access Toolbar** – you can right click on any frequently used button on the ribbon and add it to the quick access toolbar.

**Navigation Pane** – the navigation pane will allow you to switch between Email, Calendar, Contacts, and To-Do list.

**Folder Pane** – The folder pane will have a master folder for each email account or mailbox that you manage. There are default folders under each of these for Inbox, Drafts, Sent Items, Deleted Items, Junk and more.

As well as the default folders, you can create your own. Efficiency can be greatly improved if you create folders for key contacts or activities.

Right Click on any folder and select **New Folder**. Folders can be 'nested' to create subfolders.

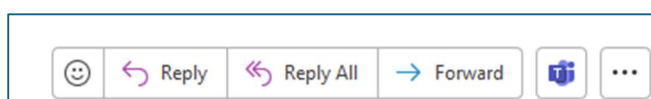


Add regularly used folders to your favourites section by right clicking on the folder and selecting **Add to Favorites**. The action can be reversed by using right click and selecting **Remove from Favorites**.

The messages you receive in an inbox will be added the message **Overview** Pane to the right of the folders.

By clicking on a message in the **Overview** pane, you make it the focus of your attention and will see a preview of the contents in the **Reading Pane**.

Each message preview contains a shortcut for dealing with messages called the **Response Menu**



## Acting on emails

You will be more organised and efficient if you treat your inbox as your to-do list.

As emails come in, follow the following rules.

- **Delete** any emails that are not relevant or do not need to be saved.
- **File** any messages that need to be kept, but do not require a response. To file a message drag and drop it into an appropriate folder. Create one if it doesn't exist.
- **Reply** to any emails where a response can be crafted in two-minutes or less. After replying, file the email in the appropriate folder. Create a folder if one doesn't already exist.
- **Forward** any emails if someone else should deal with it. File the email in the appropriate folder.
- **Defer** emails that require a more considered response, by adding an entry into the diary and scheduling the required time. The email will stay in the inbox as a reminder until it is dealt with. It can then be filed.

With regards to the defer element, you could flag the email, and add it to your to-do list with a reminder. However, this will become another source you need to check and if time has not been scheduled for the deferral, you may end up putting it off indefinitely.

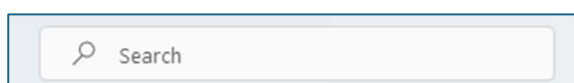
## Setting up contacts for ease of use and security

Typos happun! 😊

To reduce the risk of typing the wrong address and breaching confidentiality, add contacts to your address book. The quickest way to do this is to right click on the sender in the message preview and select **Add to Contacts**.

## Searching

Now that you are using folders, you can easily check conversation history by visiting the appropriate folder. However, sometimes, you will remember the subject or topic more easily than the sender. Search for messages using the search bar.



## Basic rules of great messages

Keep all messages short and to the point.

Re-read your message before you send it.

Make your **subject** descriptive and action oriented. If action is required, state what you want in the Subject box. Change the subject of the message if the topic of the conversation changes.

Organise the content of your message from most important to least.

Consider bolding important information and embolden people's names when asking questions. For example: "**Ryan**: What is the status of the project?"

Put action items or questions on separate lines so that they stand out and get noticed.

Limit the number of people to whom you send a message to those who need to read it. Put people who need to be informed on the Cc line but don't copy in unnecessarily.

Put people who need to respond or act on the To line.

Use a signature when appropriate, but keep your signature simple, short, professional, and if possible, free of graphics, unless they are a company requirement.

If you want an immediate response, don't send a message. Phone or send an instant message.

Acknowledge messages that require a more extensive response. If you are too busy to respond with a full answer right away, let the sender know that you are looking into the issue and will respond by a certain time or date. Defer as described earlier.

Use High Importance sparingly and make use of the tags menu for scheduling.

If you are asking a question and there are several people who could respond, choose just one person rather than sending your question to a group. Let that person forward it if necessary.

## Reply with meeting

If you are having an email conversation that has more than ten messages without a resolution, consider setting up a meeting to discuss the issue. Email isn't always an efficient medium for resolving complex issues. With the message selected, choose meeting from the **Response menu**.

If necessary, open the **Scheduling Assistant** from the meeting tabs to check availability of the invitees.

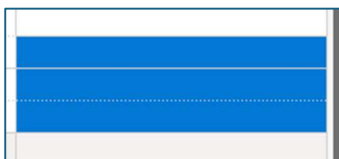
## Calendar invitations

Creating a new meeting that isn't linked to a message, is done from the Calendar window, which you can open from the navigation pane.

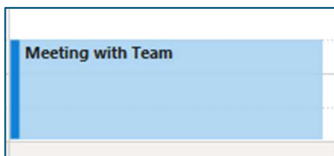
Meetings can be in person or online.

## In Person Meetings and Online Meetings (Method 1)

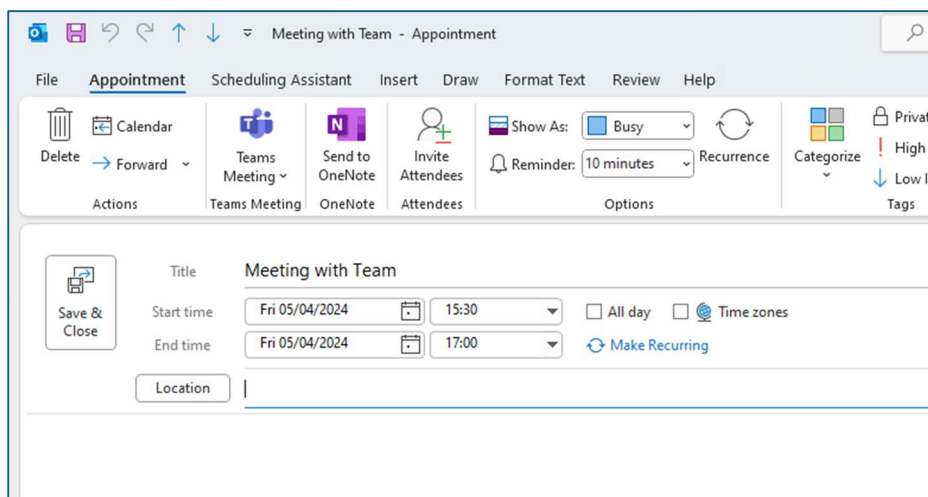
Click and drag across a space in your calendar:



Type a name for the meeting and press ENTER on your keyboard.

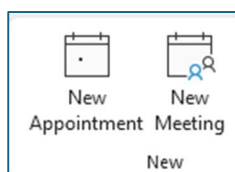


Double click on the newly created meeting and use the Teams Meeting, Invite Attendees and Location buttons to set the details.



## In Person Meetings and Online Meetings (Method 2)

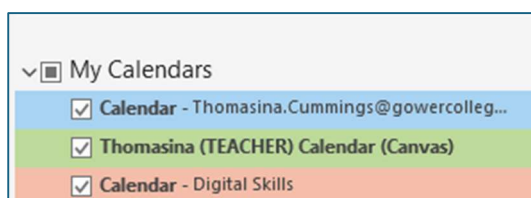
Use the New Appointment (in person) or New Meeting (online) options from the Home ribbon.



Note: even though New Appointment is intended for in person meetings, you can add a Teams Meeting link while editing the details.

## Checking Schedules

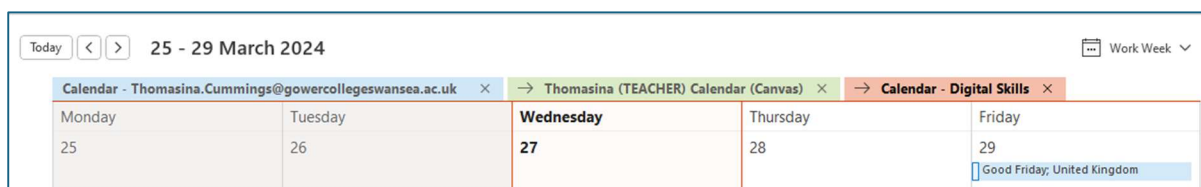
If you manage multiple calendars, you can tick to show more than one calendar before adding a new appointment or meeting. Calendars are usually located bottom left of the screen.



The calendars will open side by side.



The small arrow at the top left of the calendar title bar can be clicked to merge calendars.



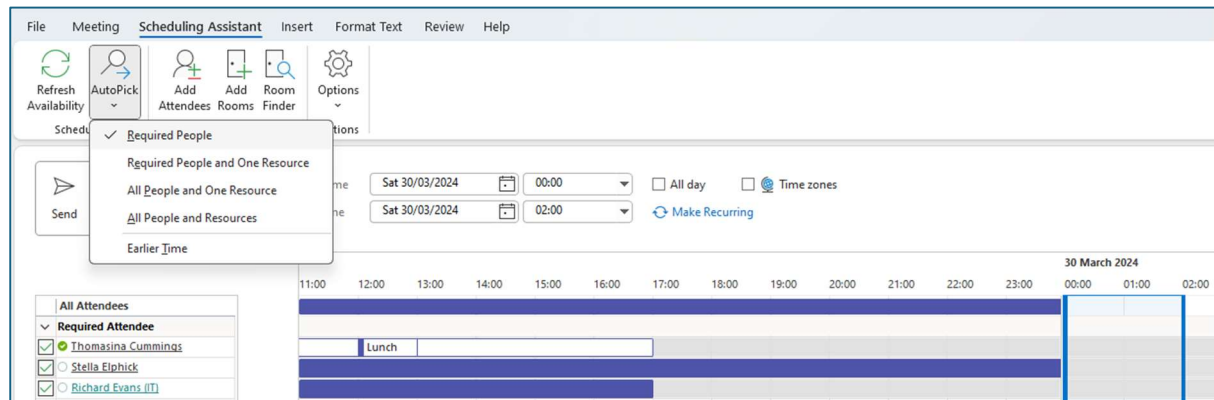
You will now see all appointments overlaid to enable you to quickly find gaps for the new meeting that work for everyone.

Viewed calendars can be removed by clicking the cross in the top right of the calendar bar.

An alternative scheduling method is to add attendees and click the Scheduling Assistant Tab.

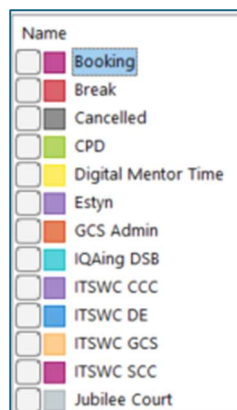
You can manually check for areas that are free or you can use the AutoPick option from the ribbon to select a free time/date.

Note: This will only work for invitees in your organisation.

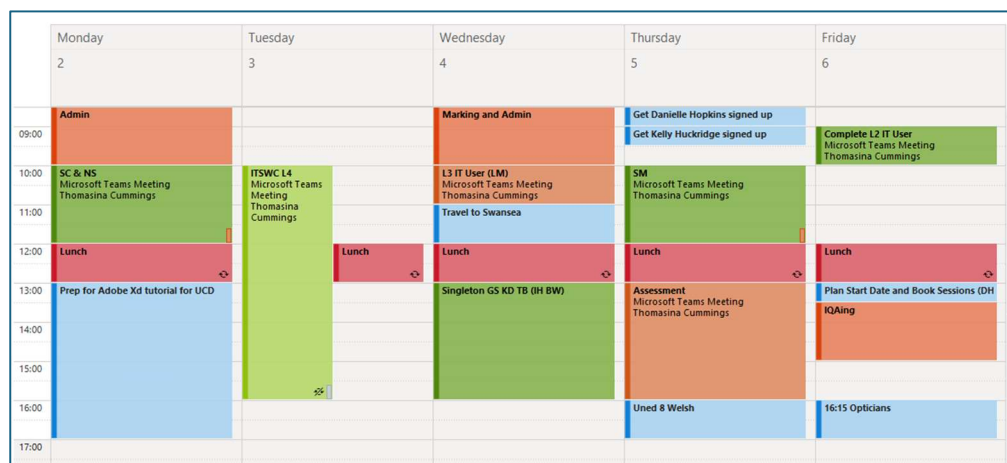


## Adding Categories to the Calendar

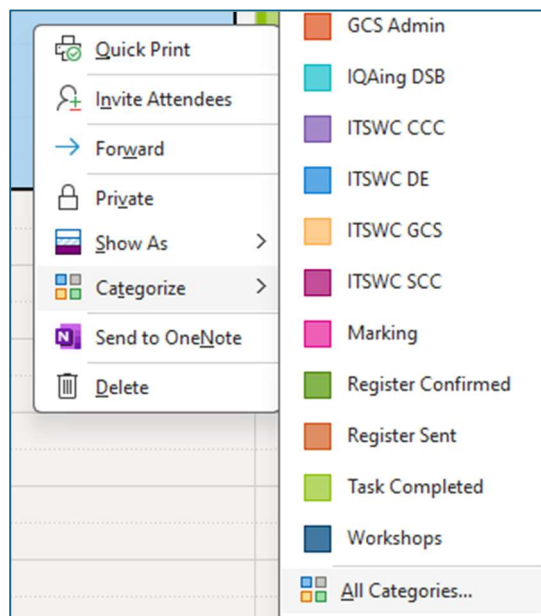
Categories can be used to colour code calendar entries.



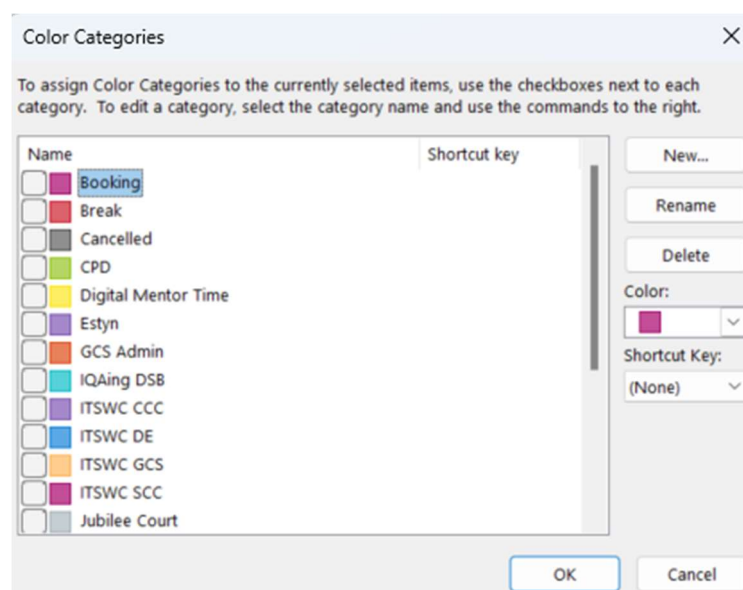
Colour coding can speed up searching and help you track outstanding tasks.



If you right click on a calendar entry, you can apply a category from the Categorize button and fly-out menu.



Alternatively, you can visit All Categories to create your own.



Even if you don't intend to use categories, try creating a few using the New, Rename, Delete and Colour Options