A GUIDE TO MICROSOFT OFFICE*

OUTLOOK

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Learning Objectives

By the close of this workshop, participants will know or be able to do the following:

- **MAIL**
  - Create and manage folders
  - Create & manage rules and filters for emails
- **SEARCH**
  - Use advanced search functions
- **TASKS**
  - Create task lists & reminders
  - Manage contacts, create and edit groups
- **JOURNAL**
  - Track productivity

Features to Practice

By the close of this workshop, participants will know or be able to do the following:

- **MAIL**
  - Create a new folder intended to contain all the email on a specific project (or whatever category you'd like to create)
  - Create a RULE to send incoming emails to that folder
  - TEST the rule (Apply it to your inbox or have someone send a test email)

- **SEARCH**
  - Use advanced search functions to locate emails that…
    - contain certain text in the **Subject Heading**
    - Are TO/FROM specific emails or names
    - Would have been sent/received by particular dates, date range

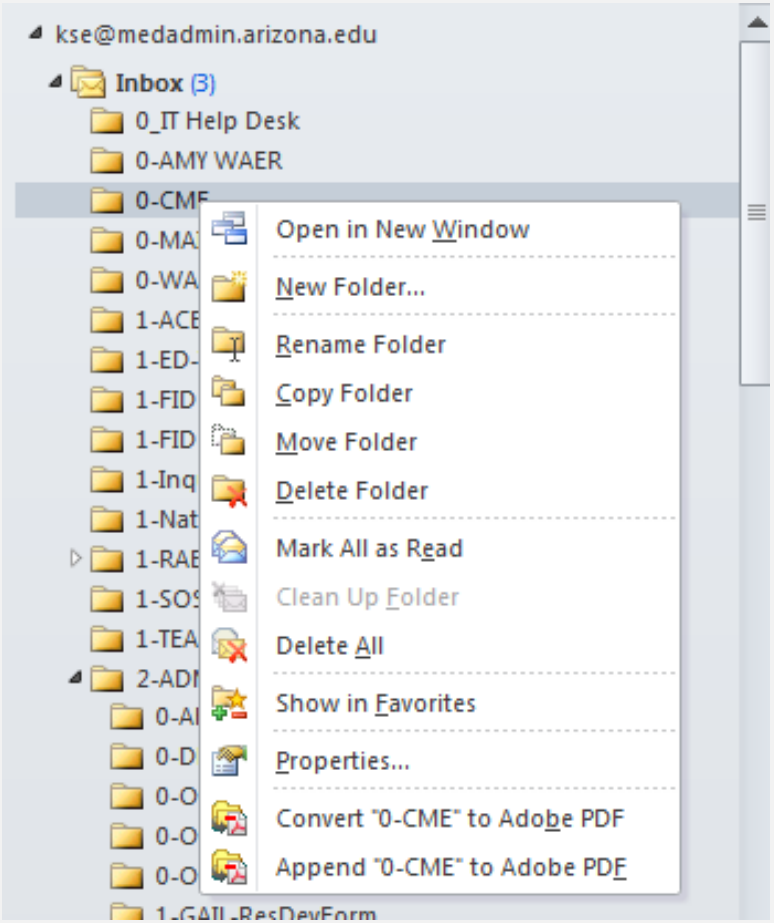
- **TASKS**
  - Create a task with a reminder
  - Create a group of contacts for a project you're working on, by office group of employees or physicians, coordinators etc. who are collaborating on a particular project

- **JOURNAL**
  - Open the JOURNAL in Outlook
  - If Journal was already ON, review for documents attached to the timeline. Open Journal entries and review the type of information recorded there.
  - If Journal was not turned on, turn it on. Create a couple of new blank documents and save them by dummy names. Return to the journal and see the type of information recorded in the entries for those files.
  - Tracking time - Create a new journal entry for a supposed conversation, etc.

MAIL

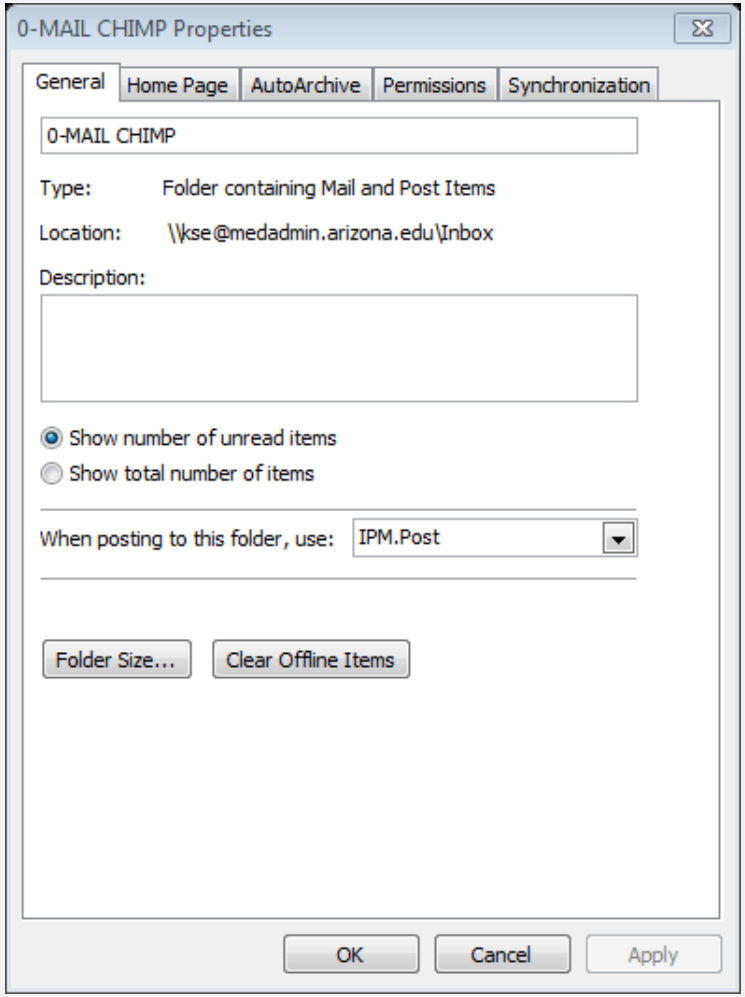
Folders, Rules & Filters

Create and Manage Folders



- Right click anywhere on the folder name
- If you have no specialized folders yet, right click on the **Inbox**
- Select **New Folder** from the pop-up window
- You can use this menu to rename, copy, move, delete and create folders

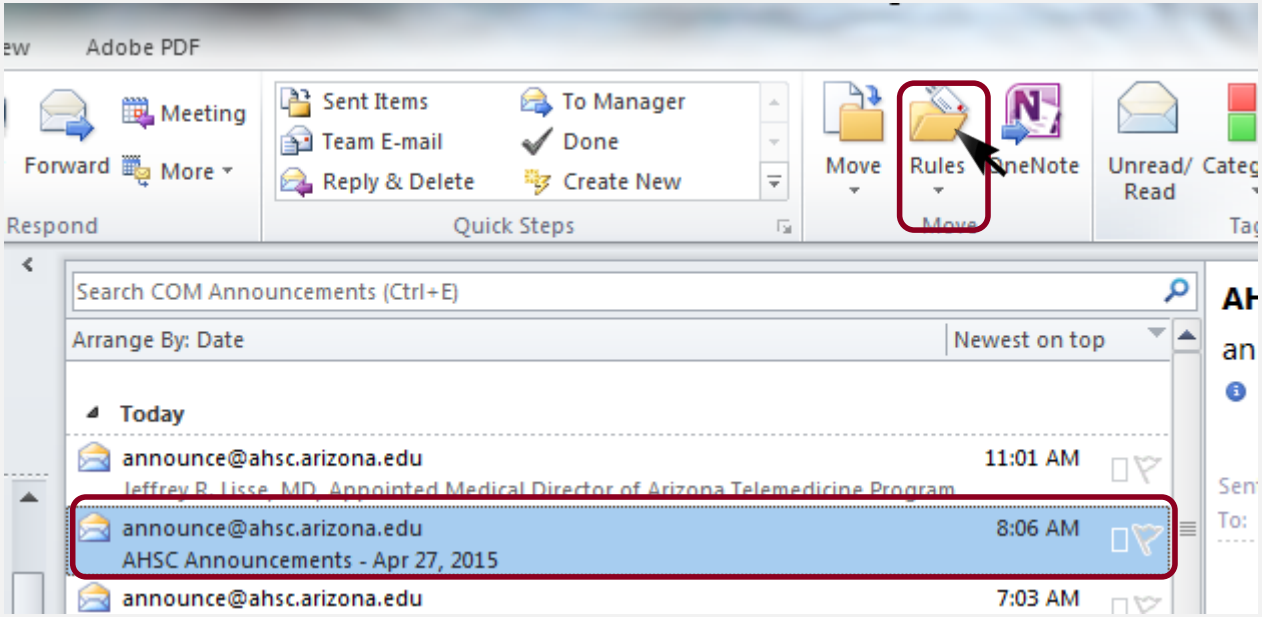
Create and Manage Folders



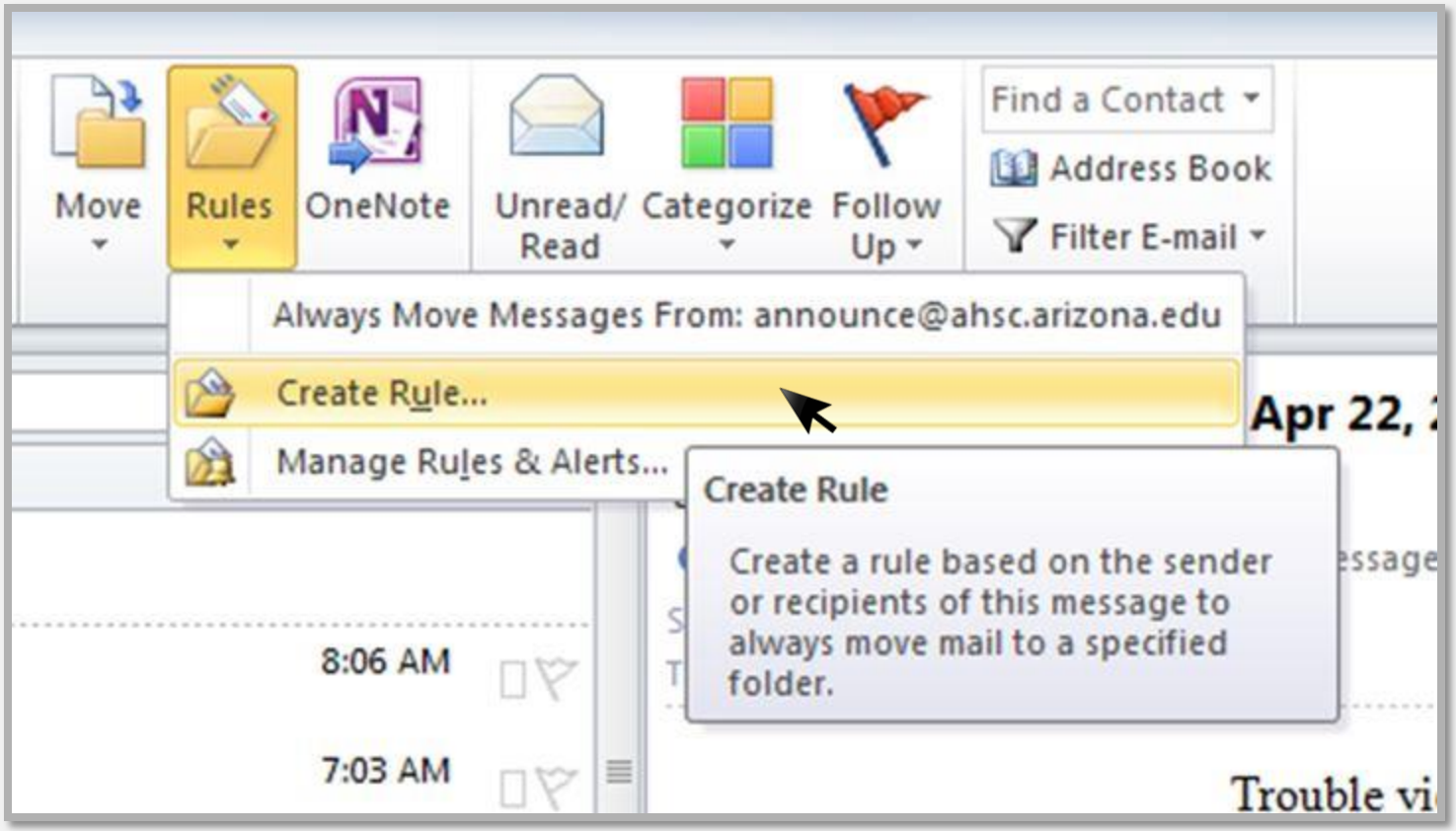
- Select PROPERTIES from the pop-up menu
- Manage settings for individual folders
- Change folder name
- Change settings, such as, whether the contents of this folder will be archived or deleted (emptied) and how often

Create & Manage Rules to Filter Emails

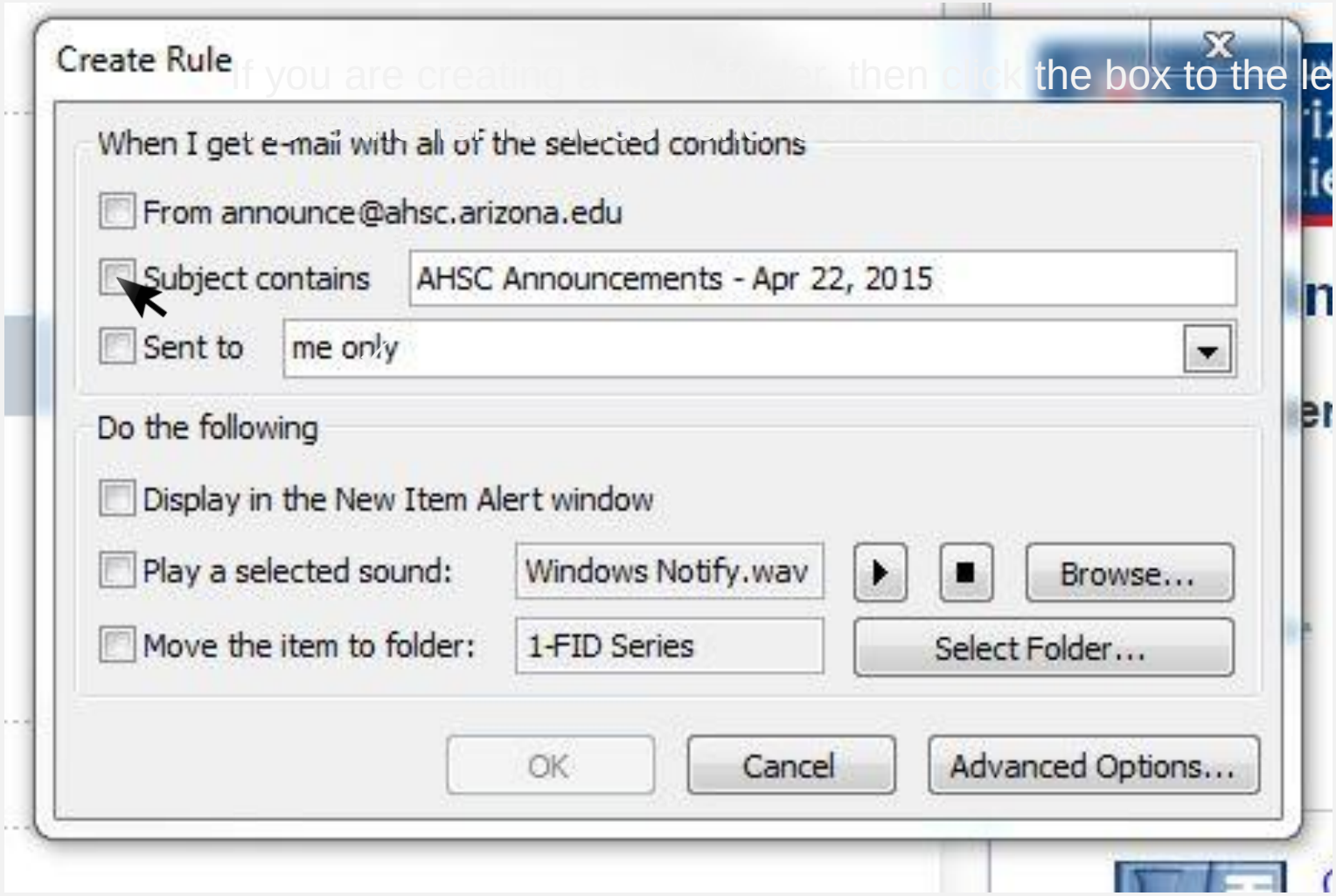
Select an email that you would like to filter so it is sent directly to a folder in your inbox. Click on “Rules” in menu bar.



Select “Create Rule”

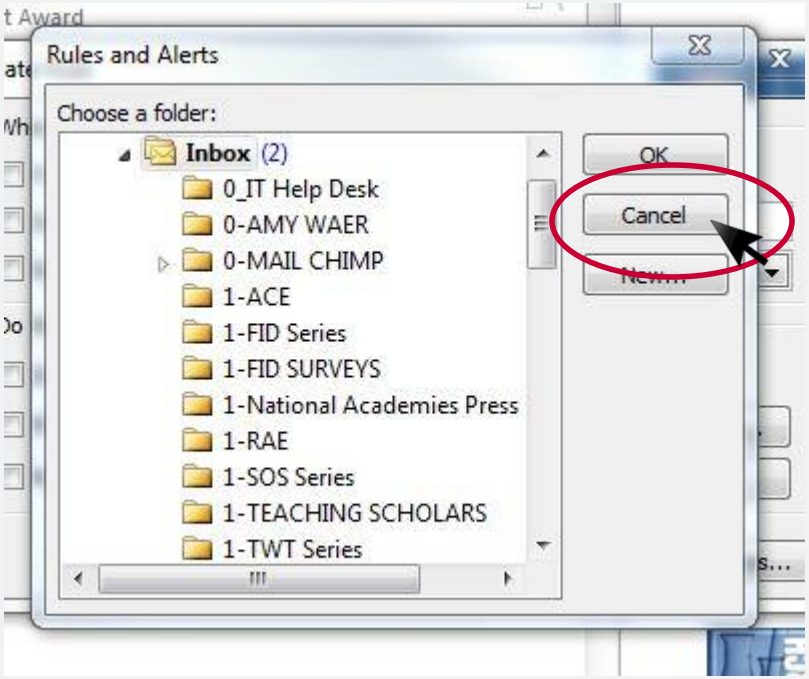


Select HOW you want the email to be filtered

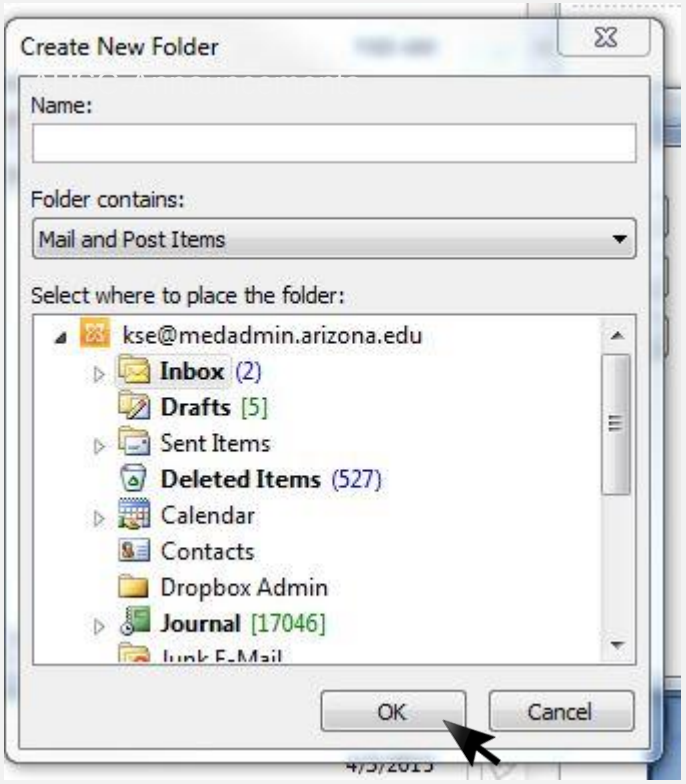


Select the folder to send emails that satisfy this rule

Choose a folder or Create one by clicking New

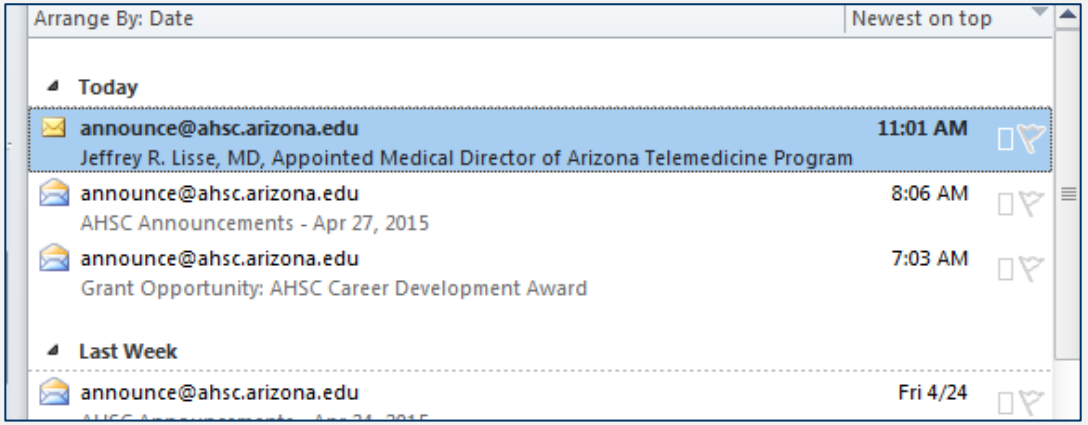


Type the new folder name, Click OK



Where to find your newly filtered emails

- After that, all emails that come in to your inbox from the email designated, or with the subject heading identified (or however you filtered the email) will be placed automatically into the folder you created.
- In the example on previous slides, the emails from announce@ahsc.arizona.edu will be placed into a folder called “AHSC Announcements”.



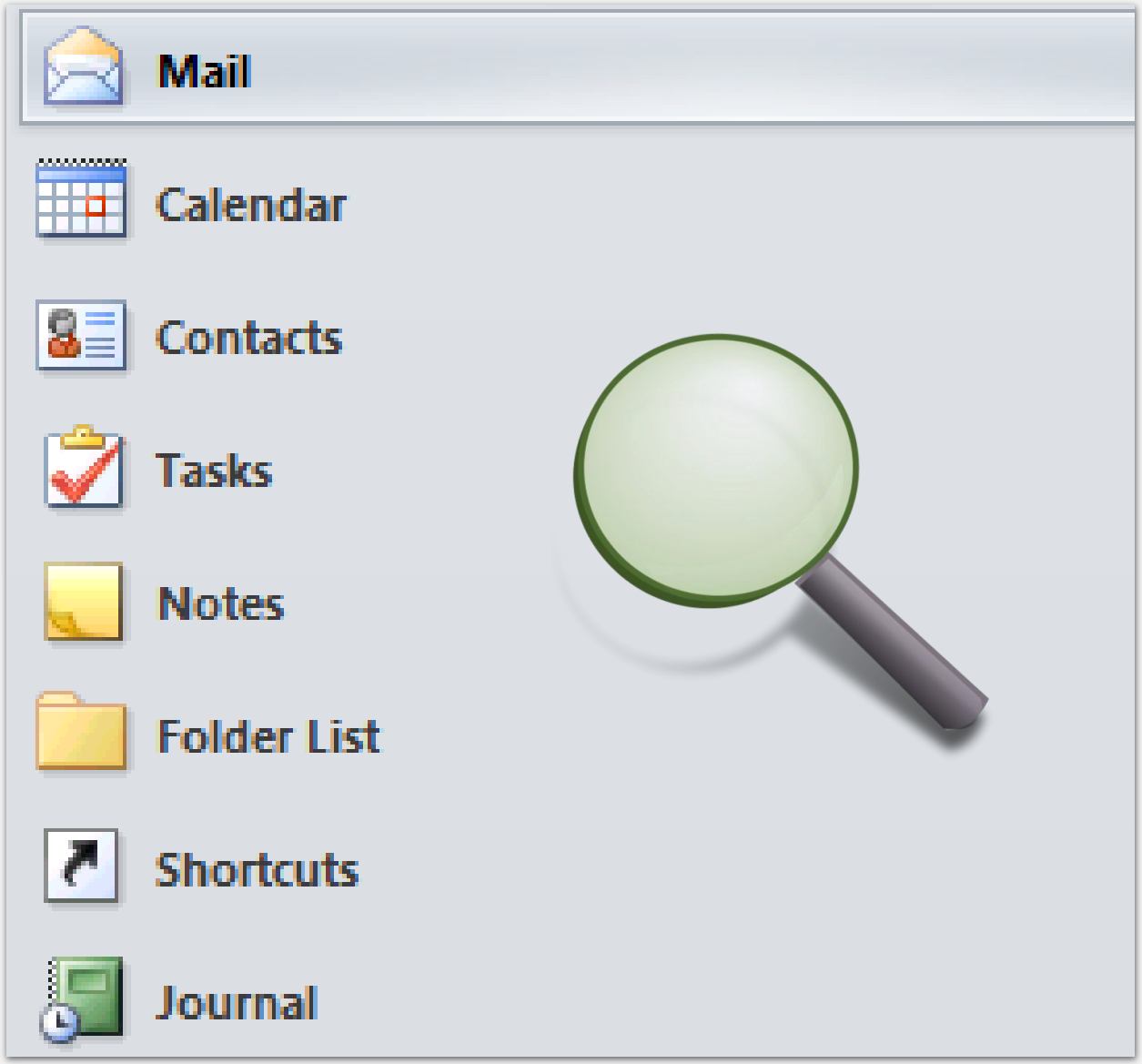
- You will not see these in your inbox.
- You will need to remember to check your folders for email.
- When folders contain new emails the name of the folder is in bold font and the number of emails appears in parentheses (usually in blue font).

ADVANCED SEARCH FUNCTIONS

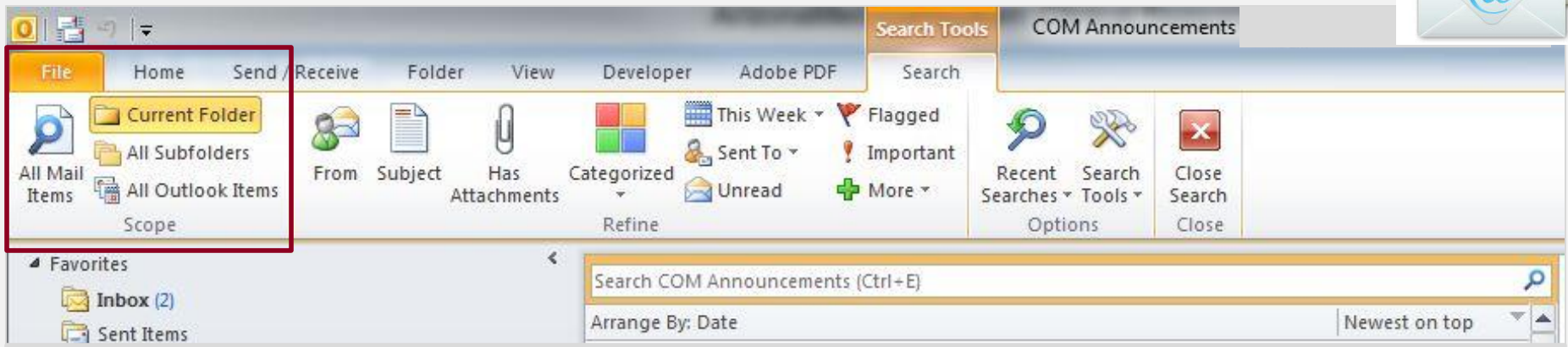
Email, Contacts, Tasks

Advanced Search Functions

- Can be used with MS Outlook
  - Mail
  - Tasks
  - Contacts
  - Calendar
  - Journal



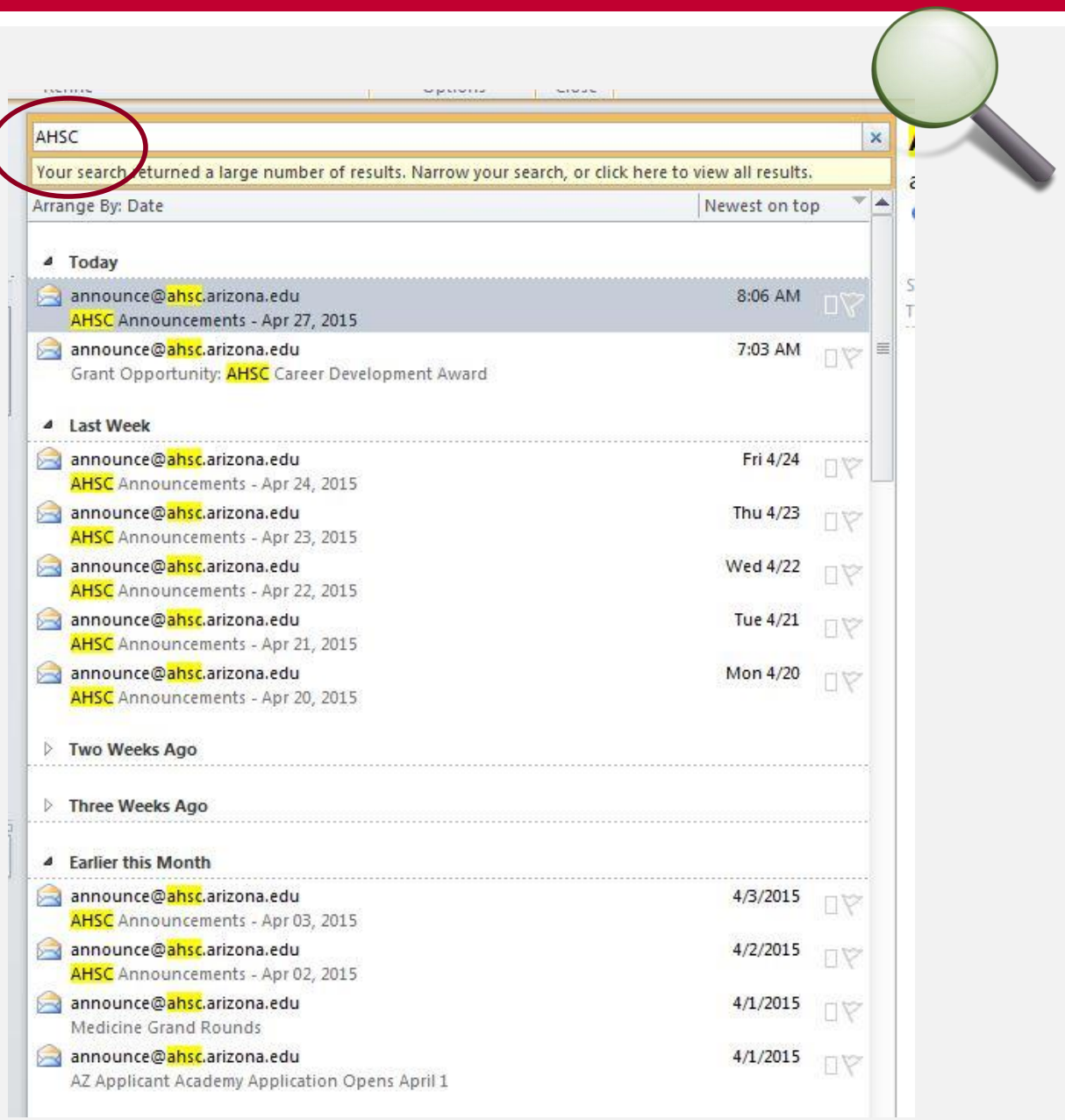
Advanced Search functions



- Select WHERE you want to search.
- The Search Tools Menu enables you to select CURRENT folder
- ALL Subfolders, ALL Outlook Items, All Mail items
- It also enables you to search only for emails with attachments or without; by date; to whom sent; whether it is unread or read, whether you have previously flagged it as important or at all, by category and from whom you received it!

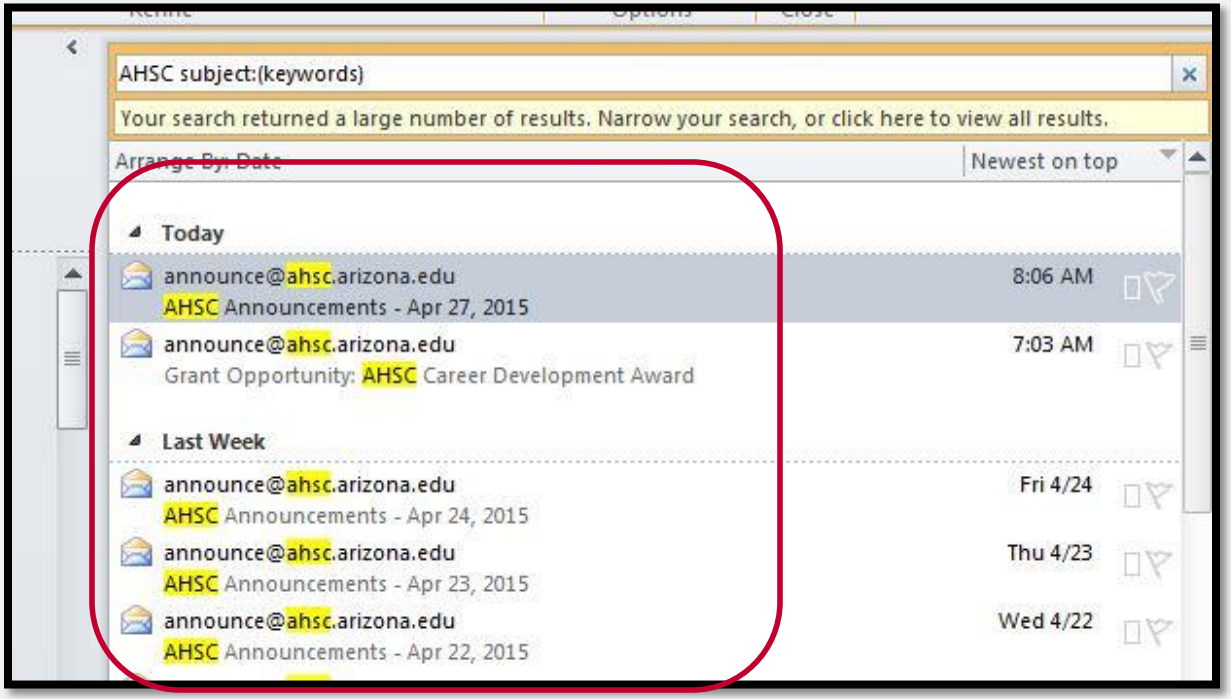
Search by Keyword

- Type the keyword
- Click, ENTER
- Search results highlight keywords



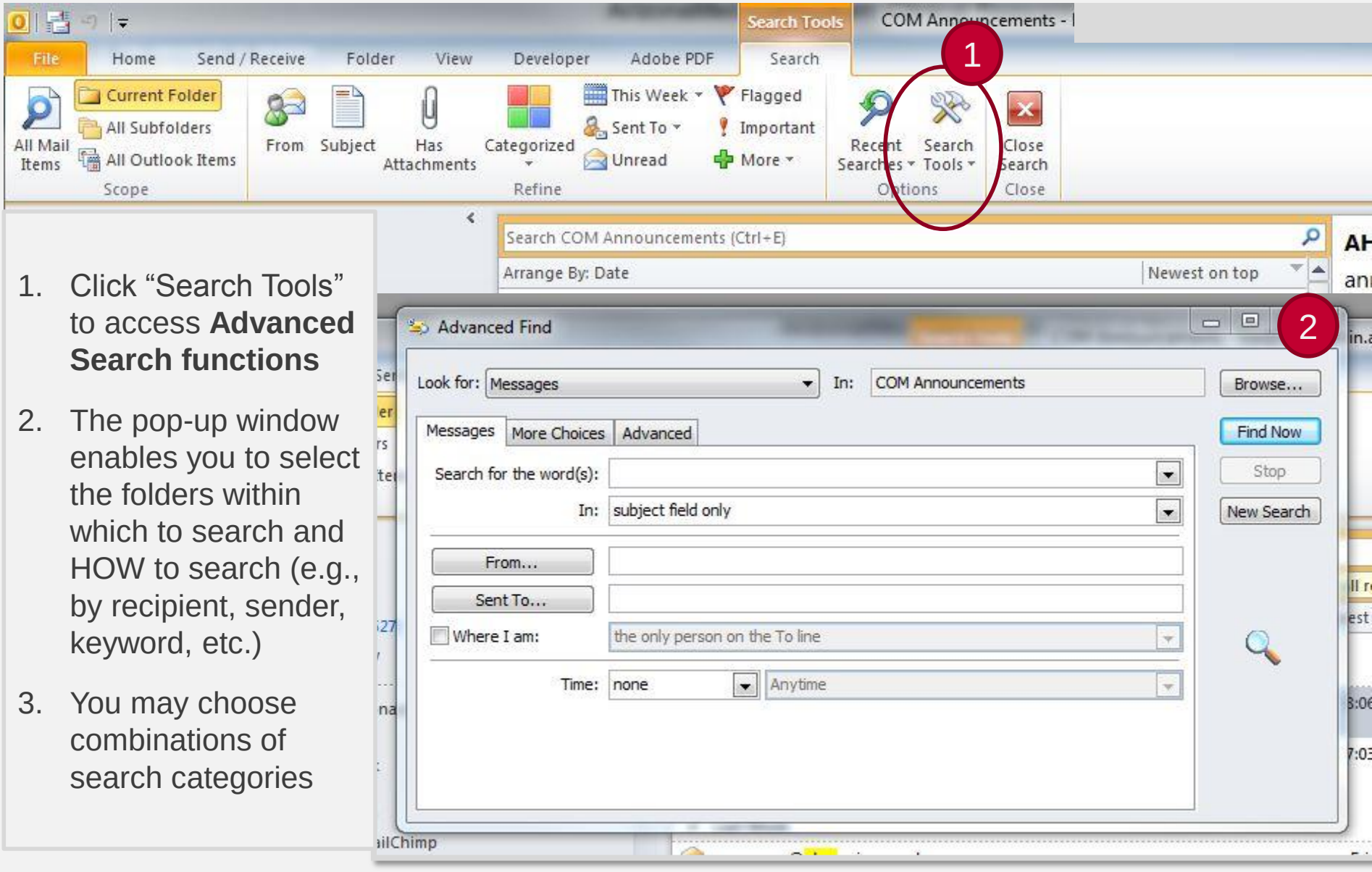
Sift through Keyword Results

- Note that the keyword could be found anywhere in the email, unless you restrict the search
- In the example, the keyword (AHSC) appears in the **email address** and the **subject line** of search results



Access All Advanced Search Tools at once

1. Click “Search Tools” to access **Advanced Search functions**
2. The pop-up window enables you to select the folders within which to search and HOW to search (e.g., by recipient, sender, keyword, etc.)
3. You may choose combinations of search categories



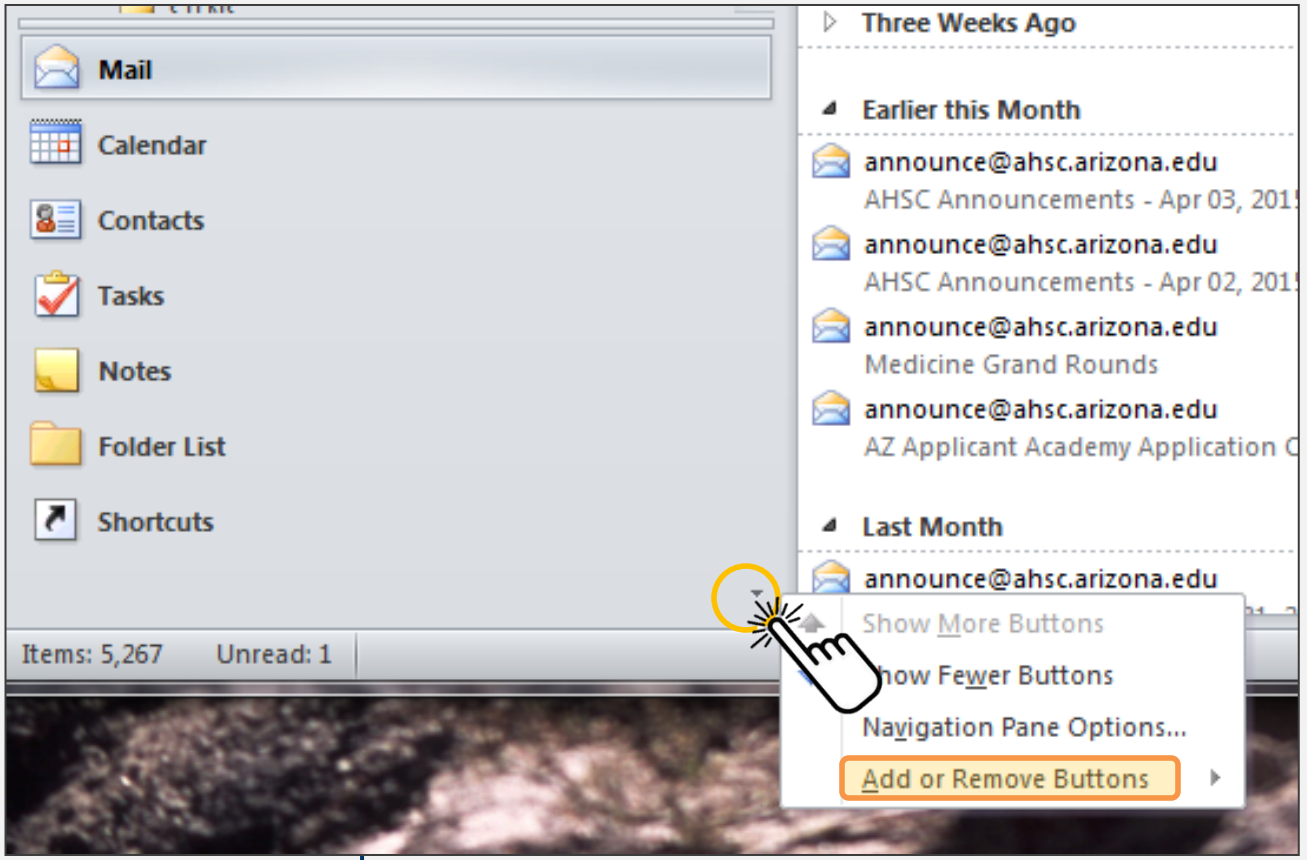
JOURNAL TOOLSET

Track Productivity, Search Office Files via MS Outlook Advanced Search Features

Journal

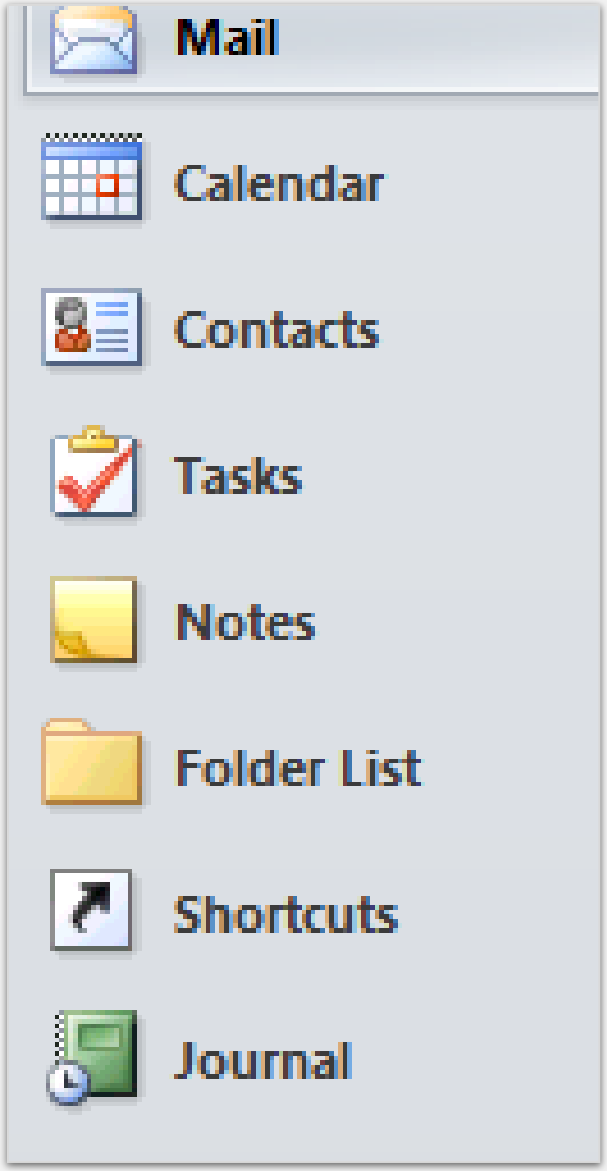
How to Start the Journal Function

- **Go to the list** of folders at the bottom left of your Outlook window
- **Click** on the upside down triangle at lower right of this region of the window
- On the menu that pops up, click on "**Add or Remove Buttons**"

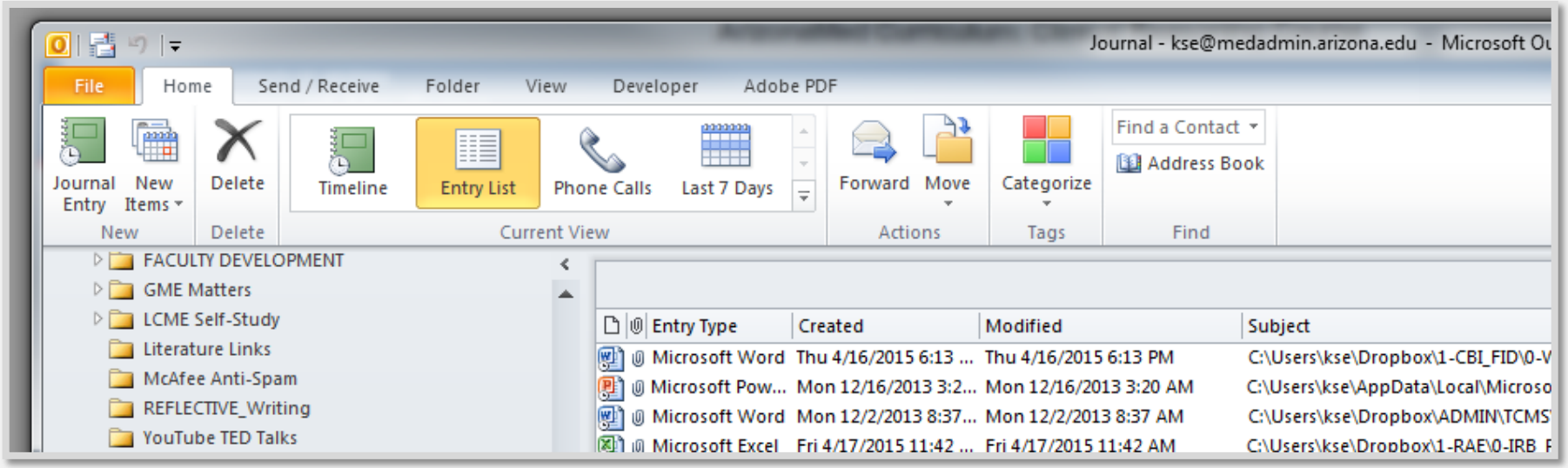


Once you turn on the Journal…

- It will then appear in your FOLDER list
- The Outlook Folder list is NOT your EMAIL folder list; it appears below your EMAIL folders.

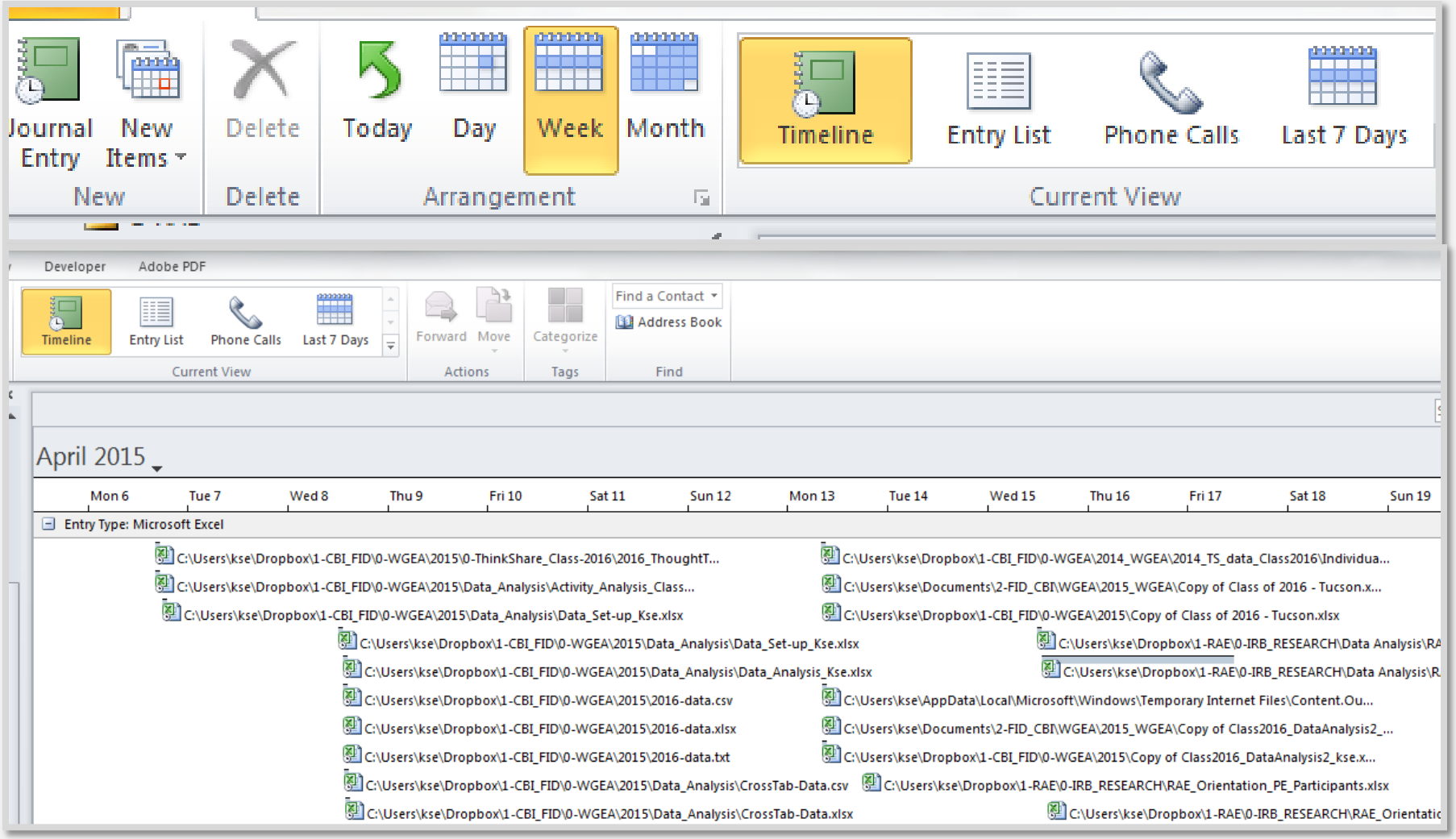


View Journal Entries as an Entry List



- When you set up the Journal for the first time, Outlook will open a **dialogue box** that asks you to select the programs or Outlook features you would like to document in your journal (e.g., Microsoft Office Excel, Appointments, etc.).
- These will be logged AUTOMATICALLY in your Journal.
- Then you may sort by any column, e.g., entry type (program or manually created category), date created, date modified, subject, or category

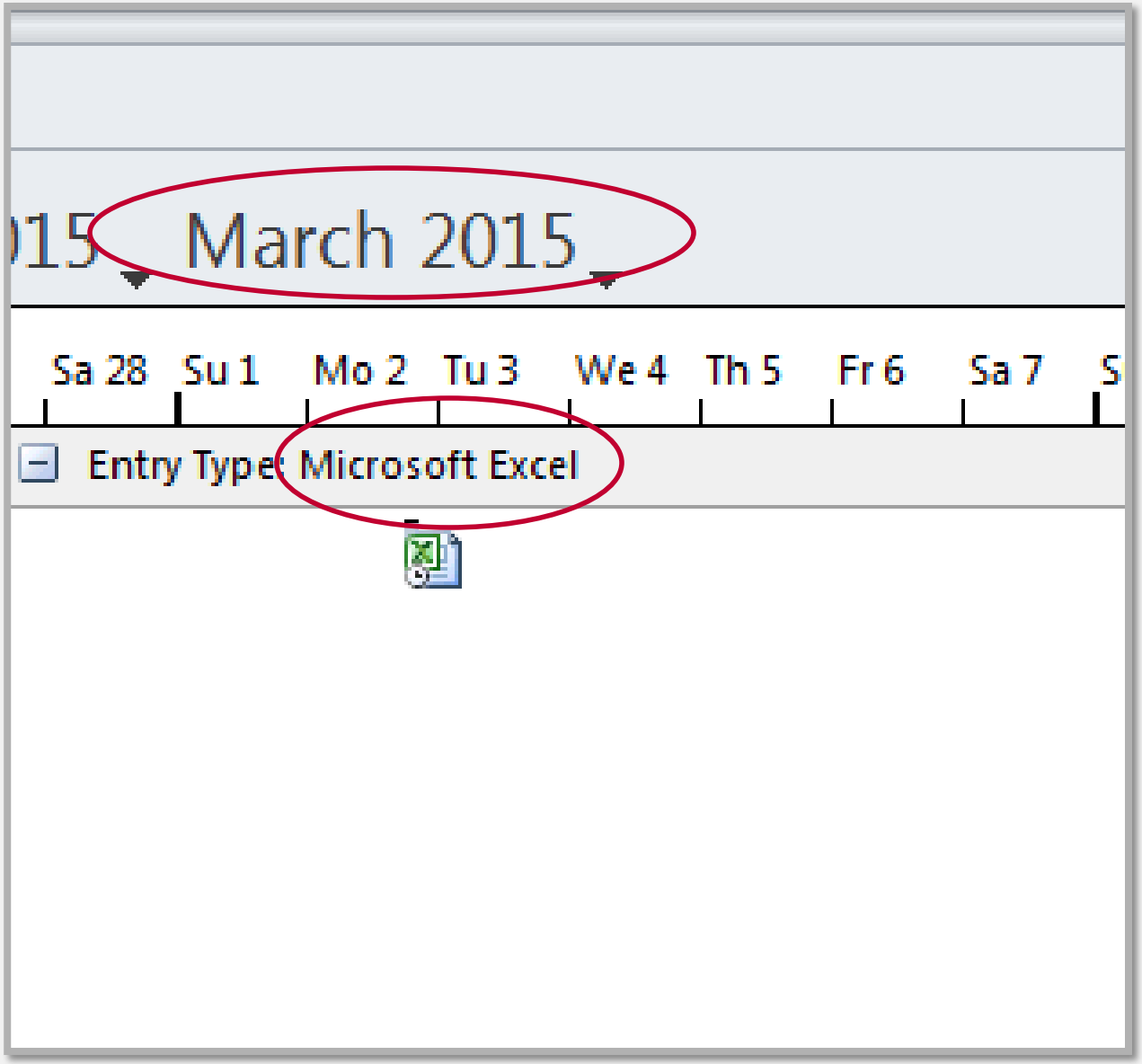
Journal Entries as a Timeline



Select Timeline view and then choose time period (day, week or month)

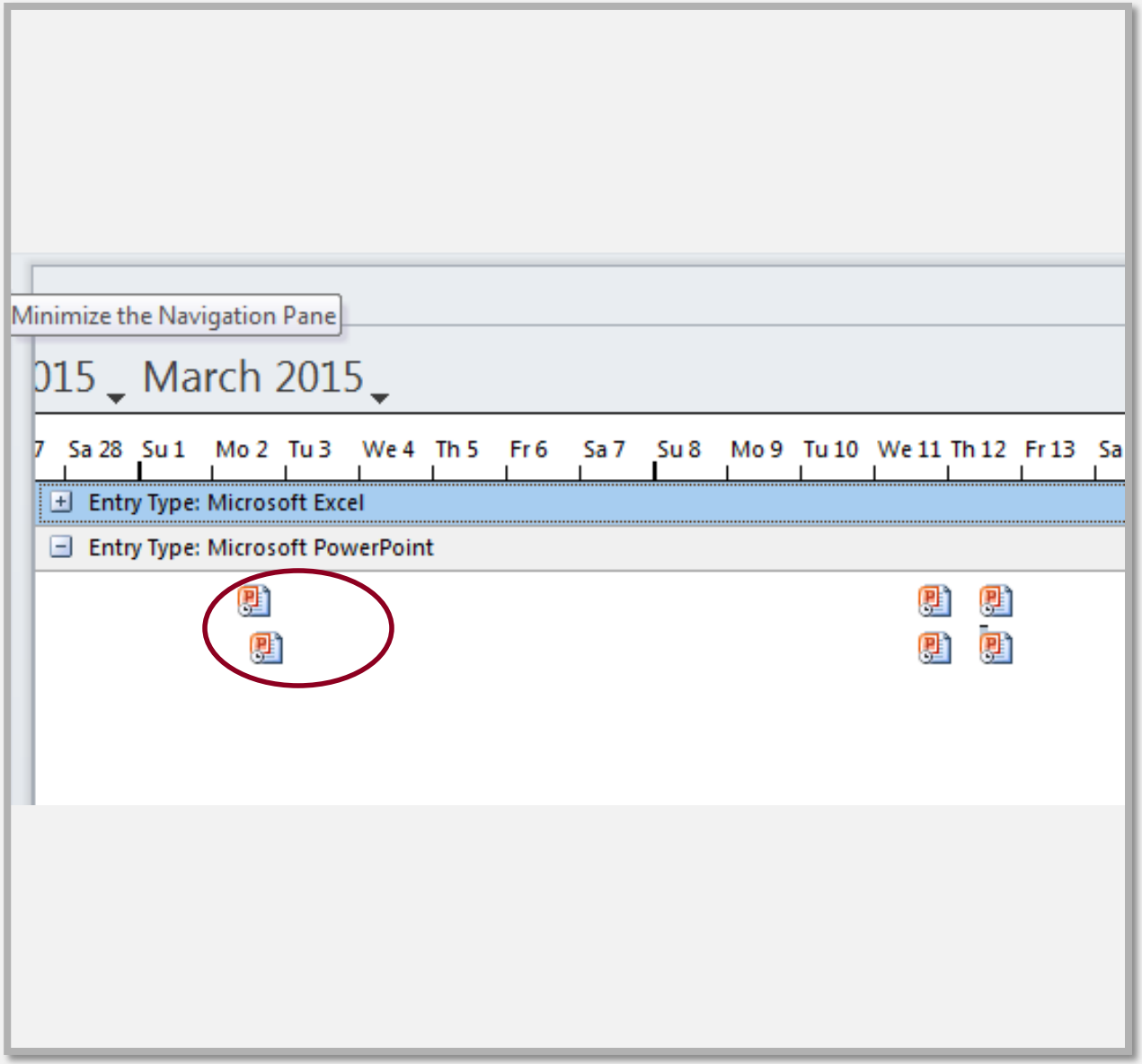
Journal Entries may be sorted by…

- Date
- MS Office Program
- Manually created entries (e.g., phone calls)



Filter by Microsoft Office Program

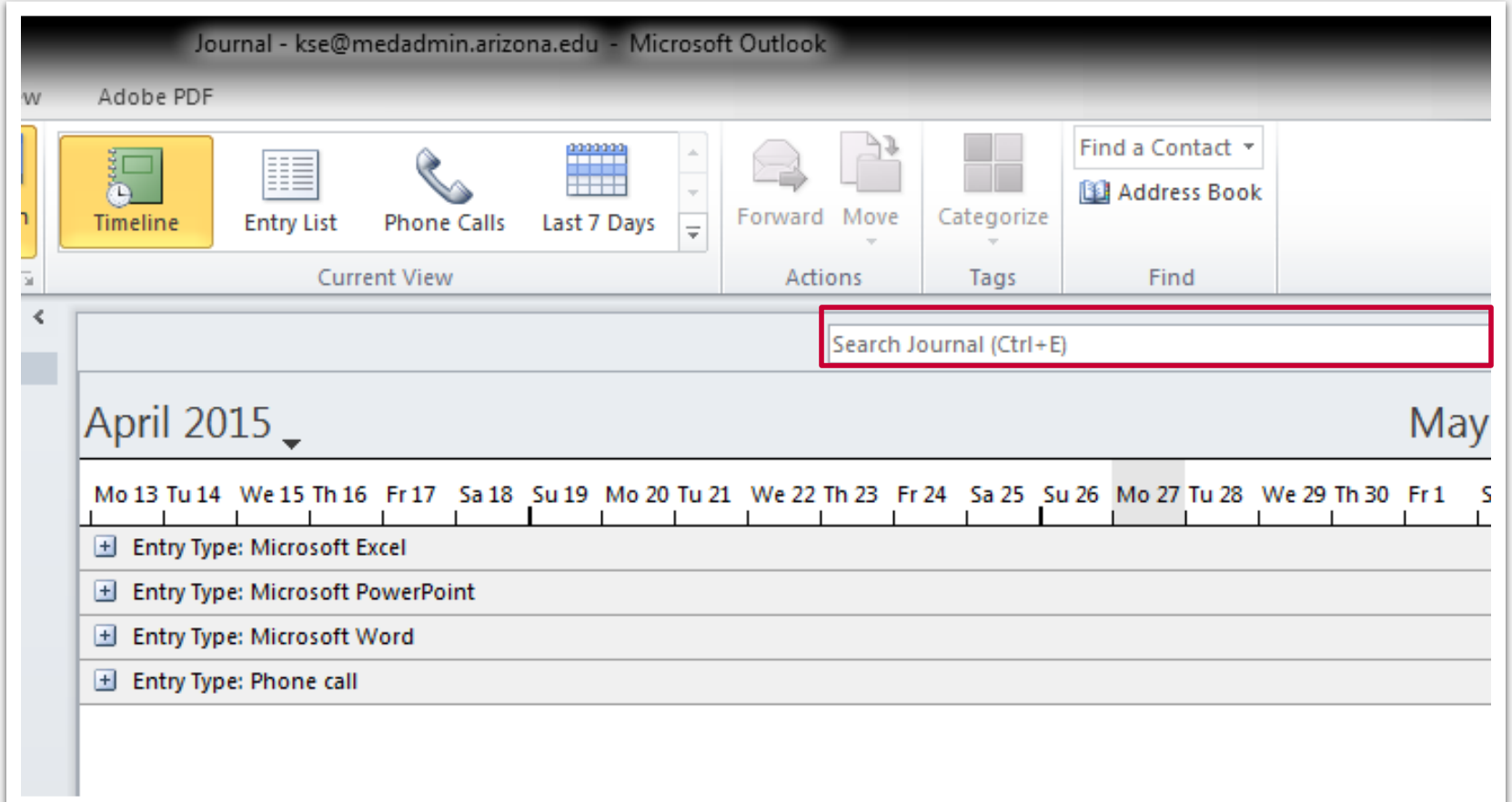
- Excel
- PowerPoint
- Visio
- Word
- Example – Journal shows only PowerPoint files when you select Microsoft PowerPoint



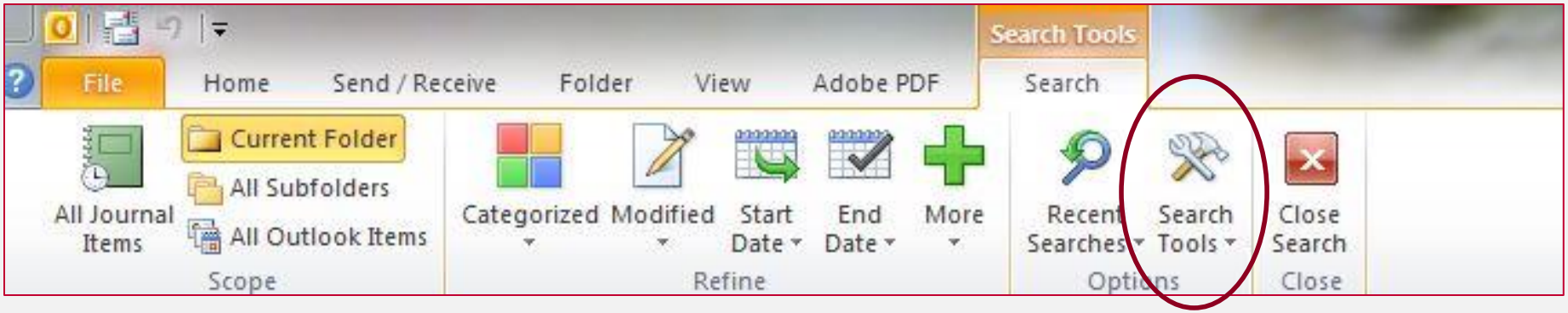
Search Journal Entries

Advanced search tools are available with the Journal as they are with other aspects of the MS Outlook program

Just start typing in the search Journal text box (upper right of window), OR…

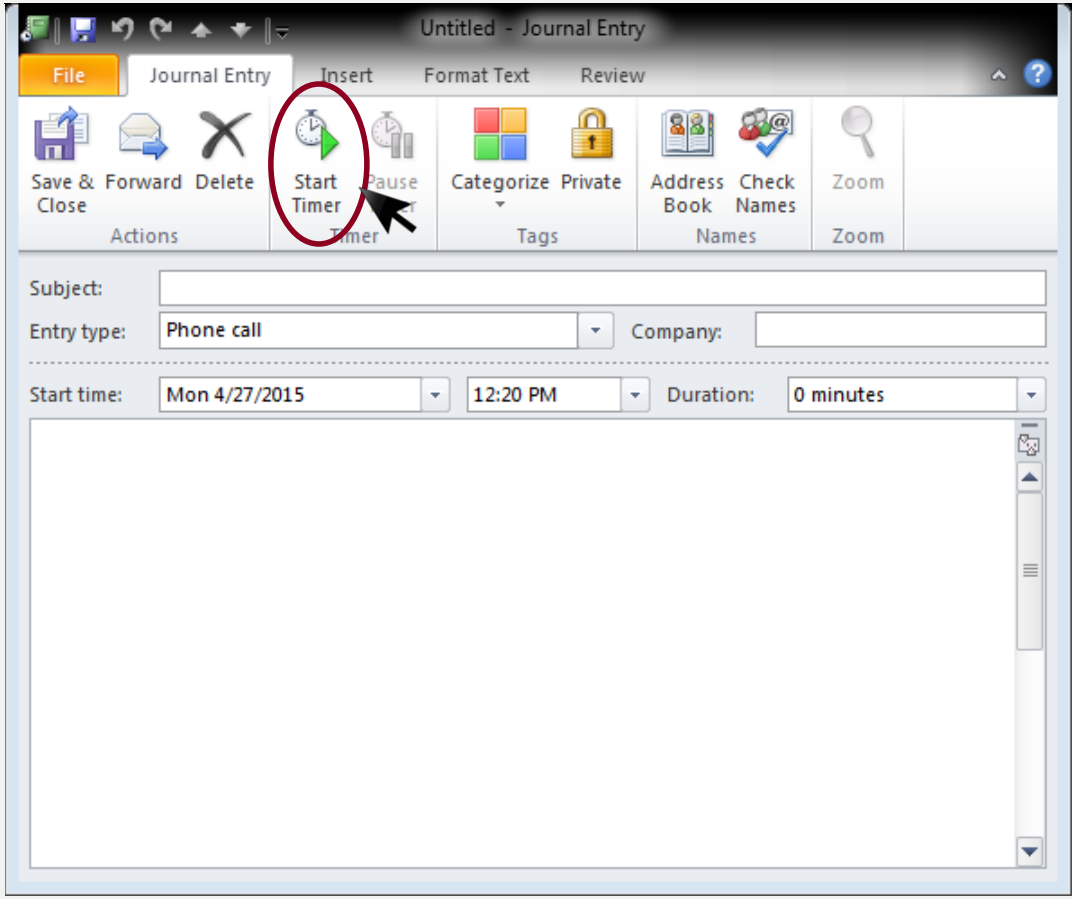


Search Journal Entries



- Click the Search Tools tab on the MS Outlook Menu that runs along the top of the program window and then select the advanced search tools you want

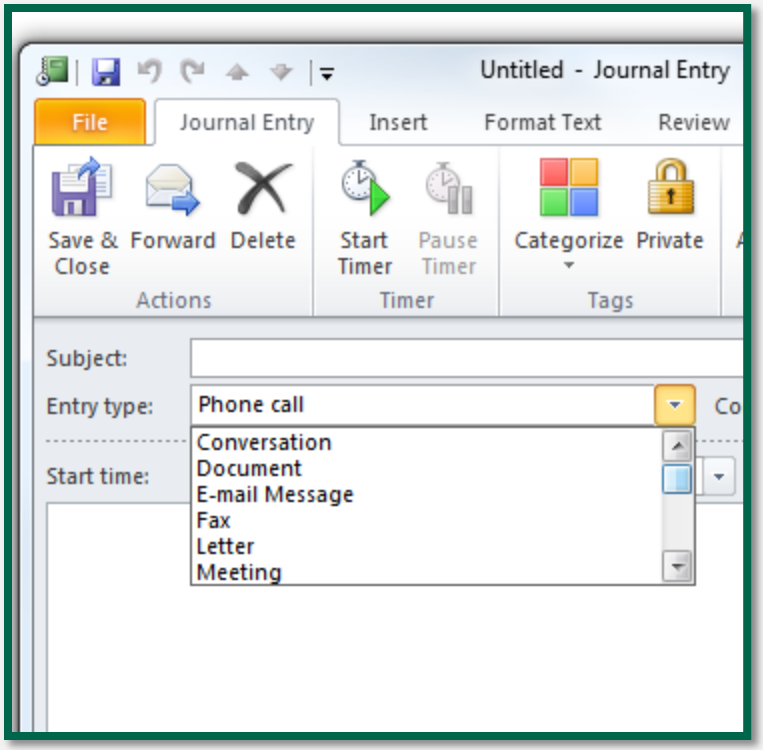
Manually Create Journal Entries to Track Time



- **Why would you want to do this?**
  If you're tracking the time you spend on a task that is NOT automatically tracked by MS Outlook.
- Example: Tracking time spent on grant funded projects

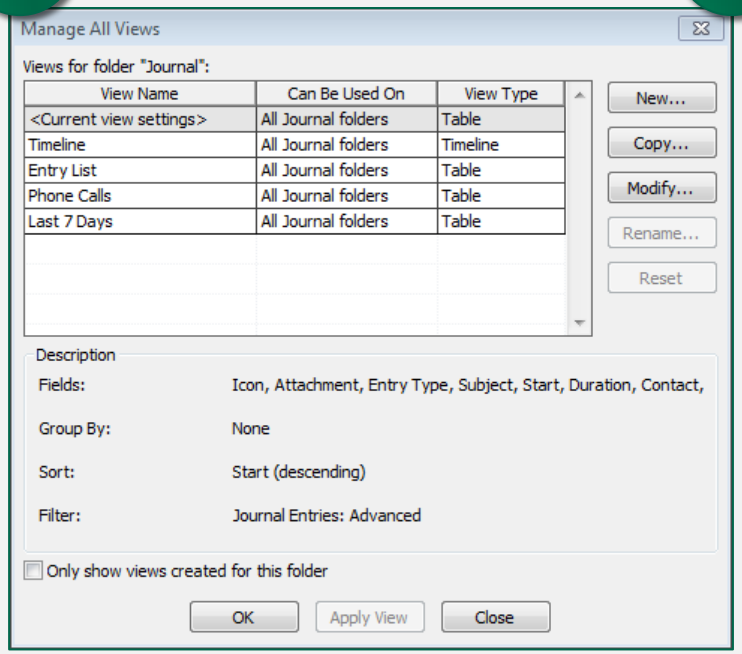
Manually Create Journal Entries to Track Time

- You can select a journal entry type (above) when creating a new entry.
- Or, select from types of tasks not shown in the Current View on the menu toolbar →



Manually Create Other Journal Views

1



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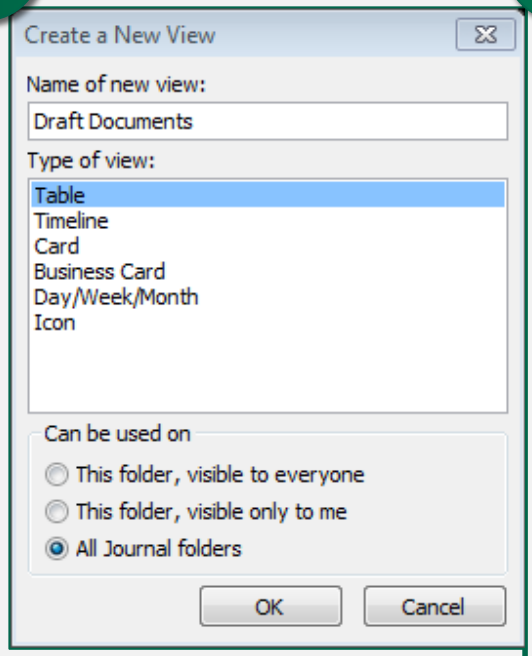

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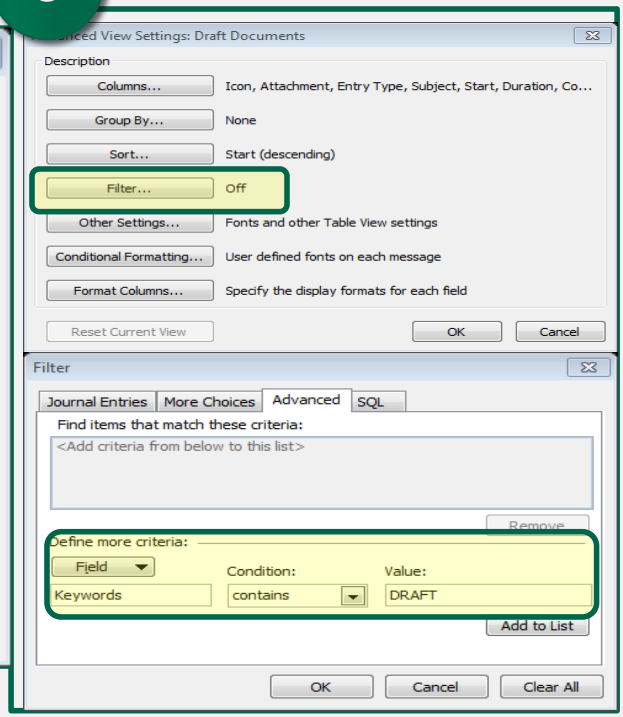
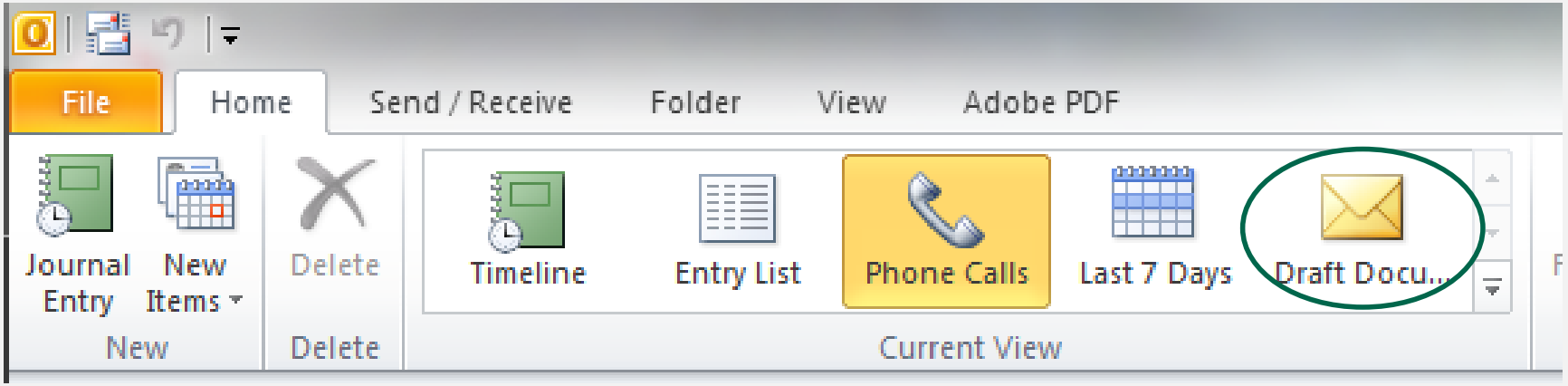
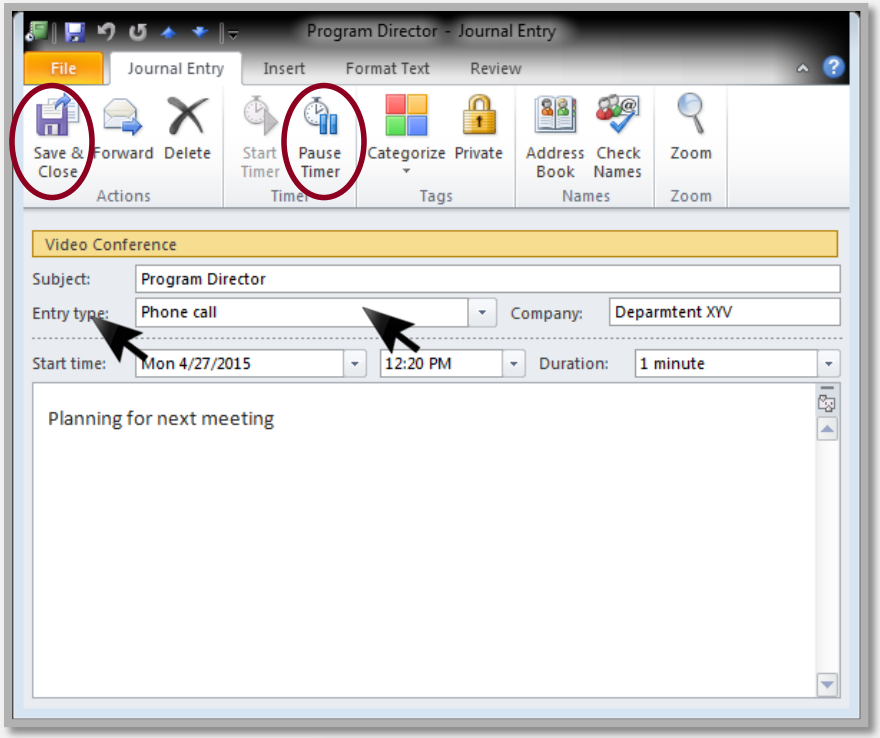




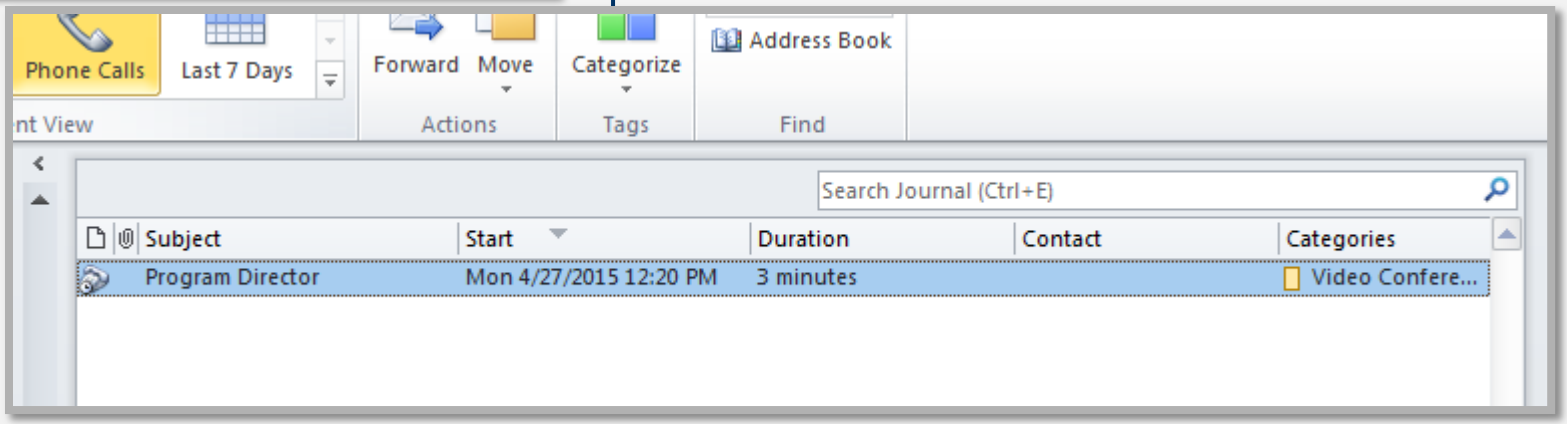
When you're done with the phone conference or other event…

Click Pause Timer



Add Information to the Journal Entry

- When you're done with the event, click "Pause Timer"
- Make any additional notes you need to, then click "Save & Close"
- The Journal will reflect your phone call.



TASKS

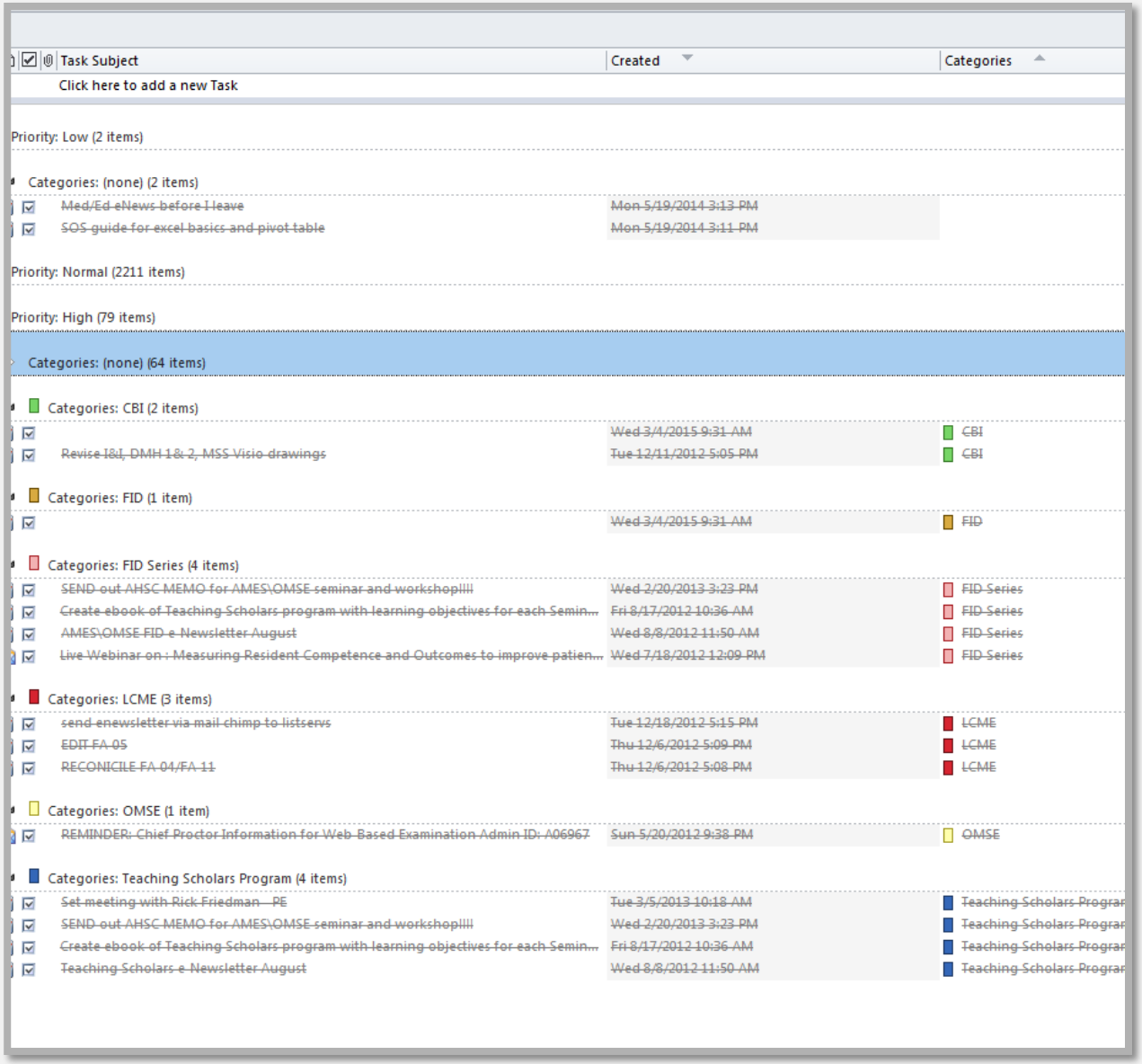
Create and manage task lists; Create reminders; View by categories

Task Lists & Reminders

- Create tasks and reminders from emails
- Create tasks and reminders separately
- Categorize tasks by importance, category or date
- View by priority of importance (low, normal, high), date (most recent, oldest) and category.

View by Categories

- Categories for tasks will be shown in the Task List
- View by category, date, priority
- Create new categories



CONTACTS

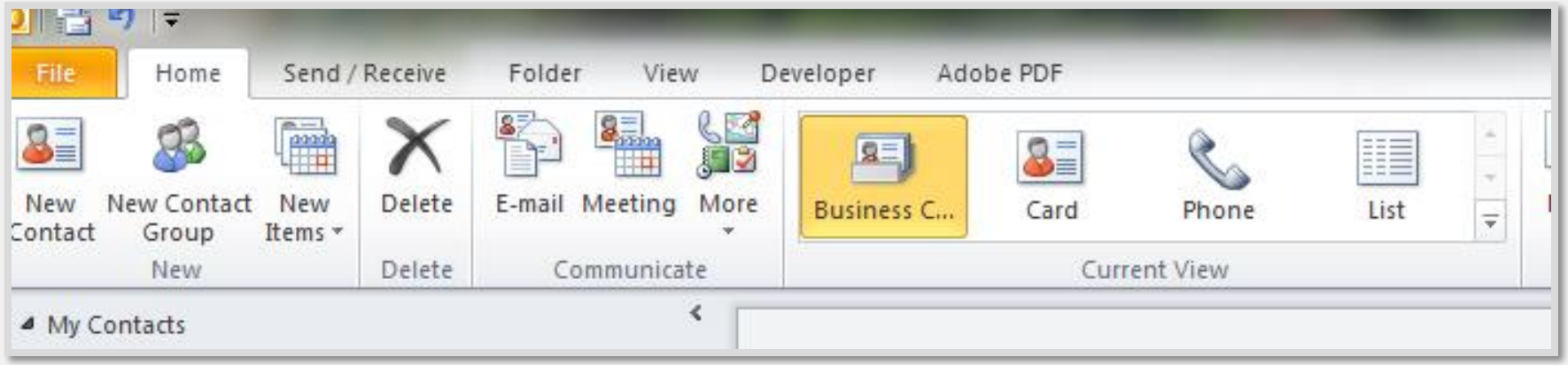
Create and manage contacts; Groups

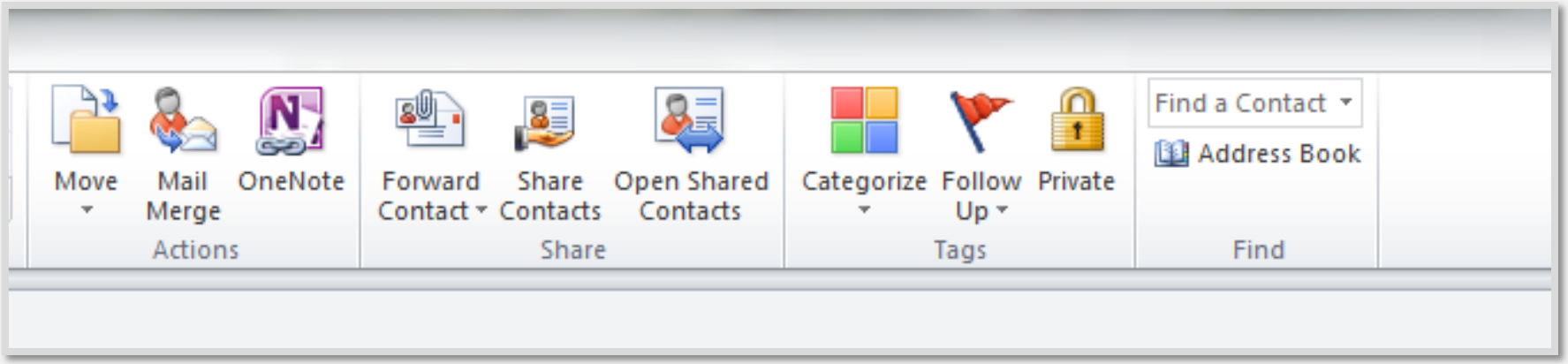
Manage Contacts

- Categorize contacts
- Create contact groups

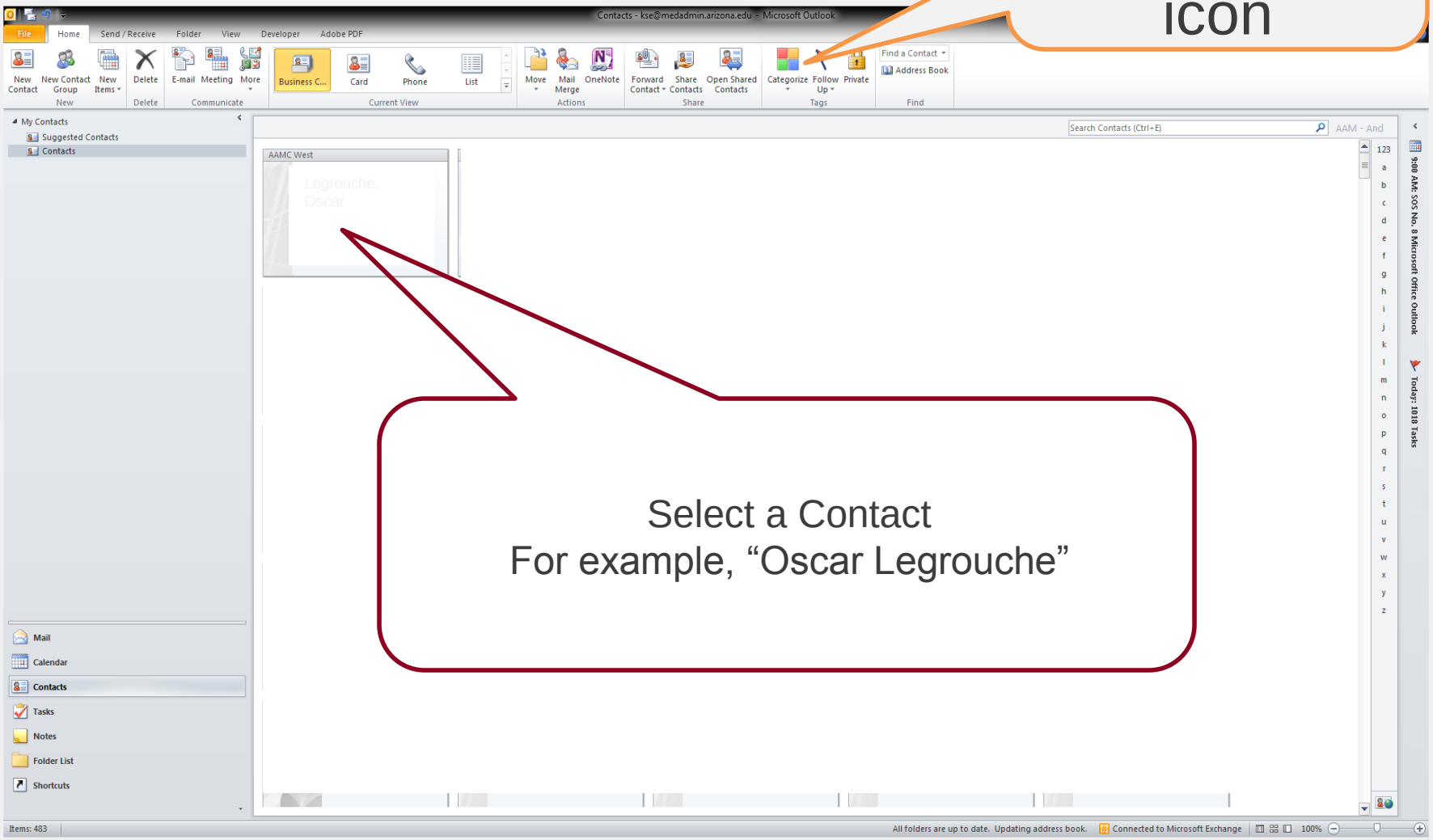
Categorize Contacts

- These are the choices on the Contacts Menu in Microsoft Office Outlook.
- Select a VIEW, such as “Business cards” or “List”.



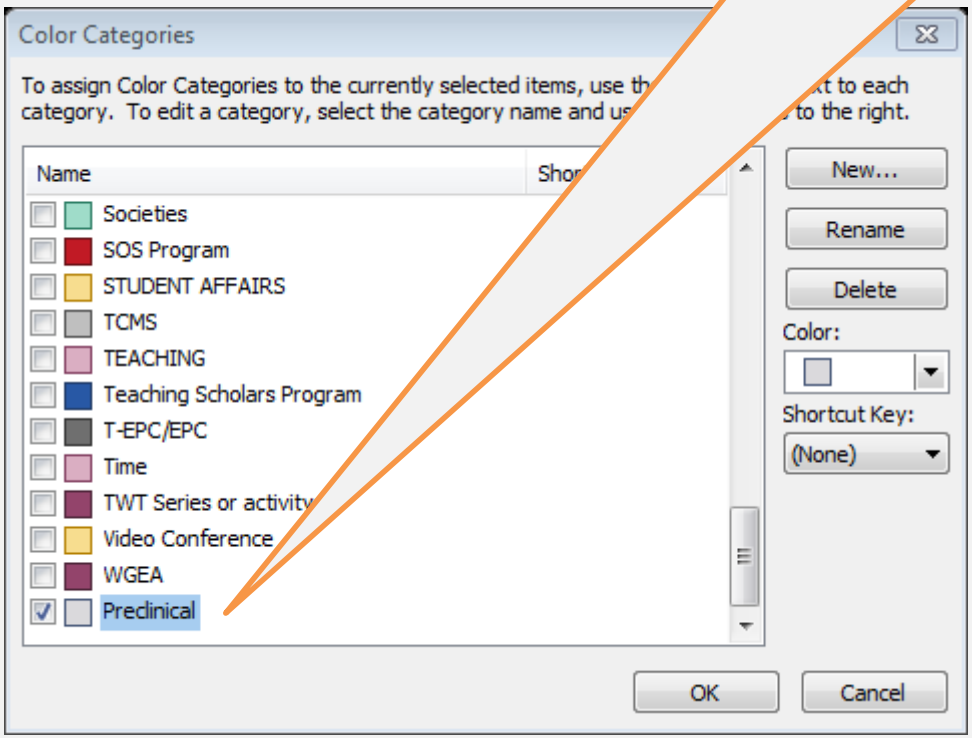


Categorize Contacts

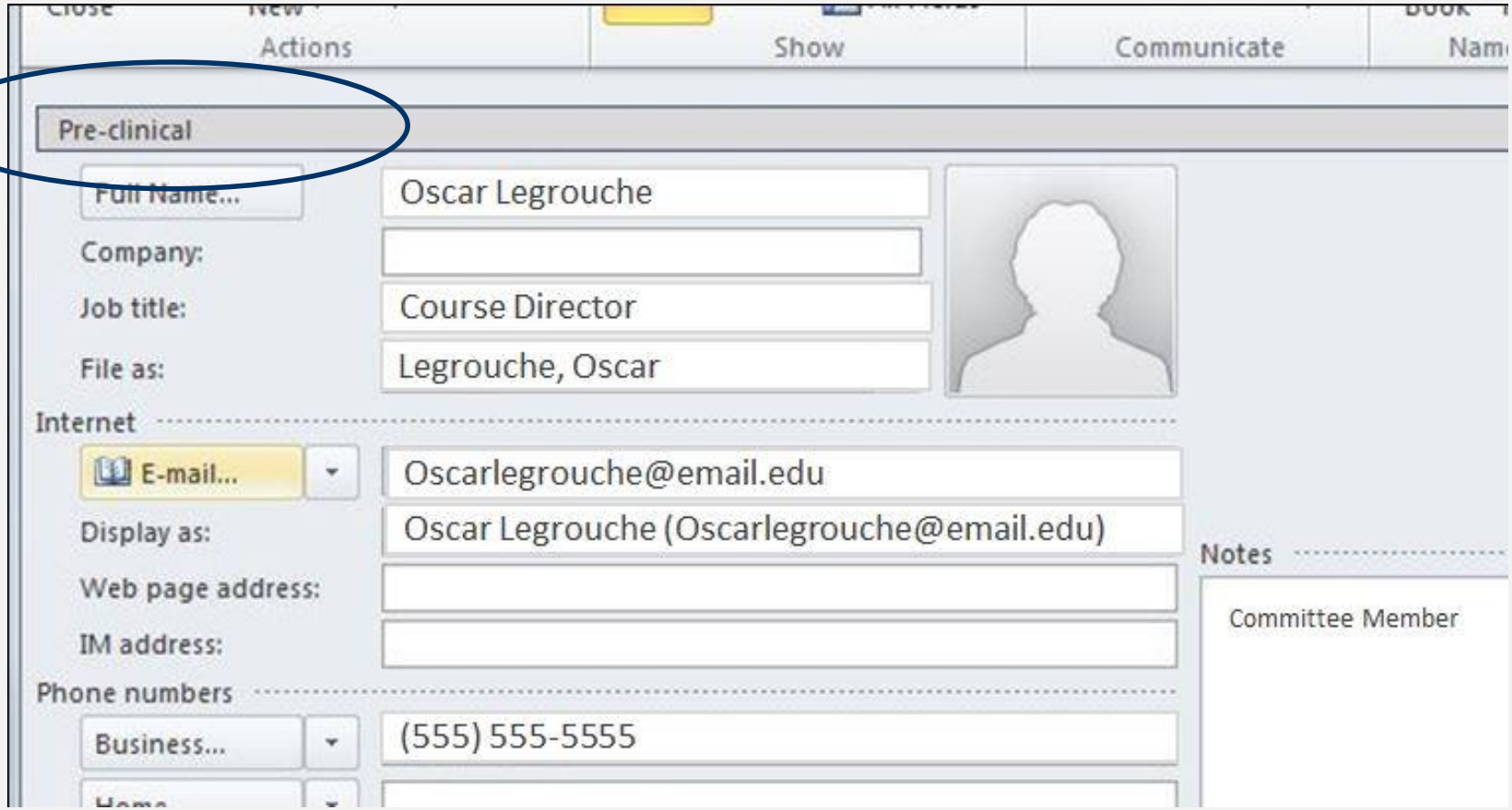


Create new category f

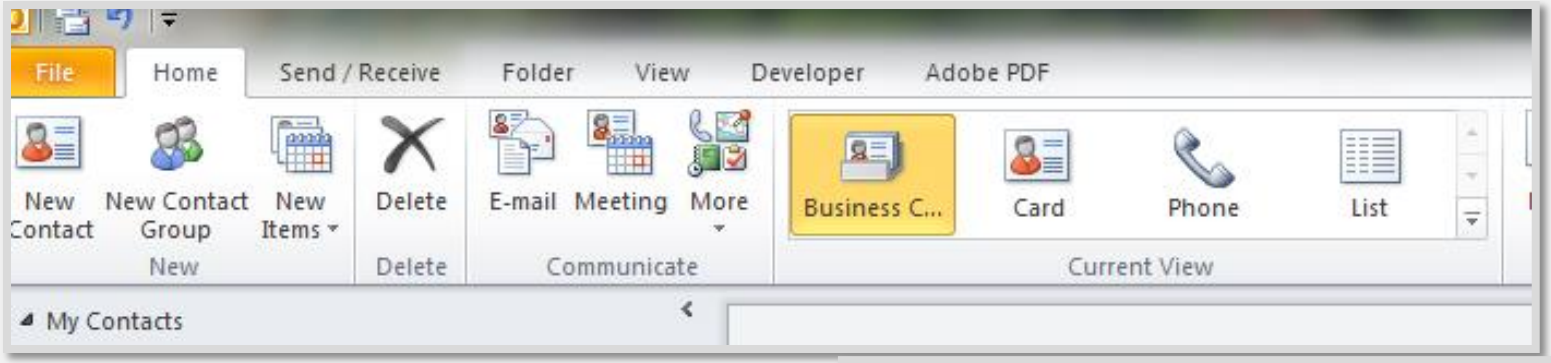
Select or Create a Category



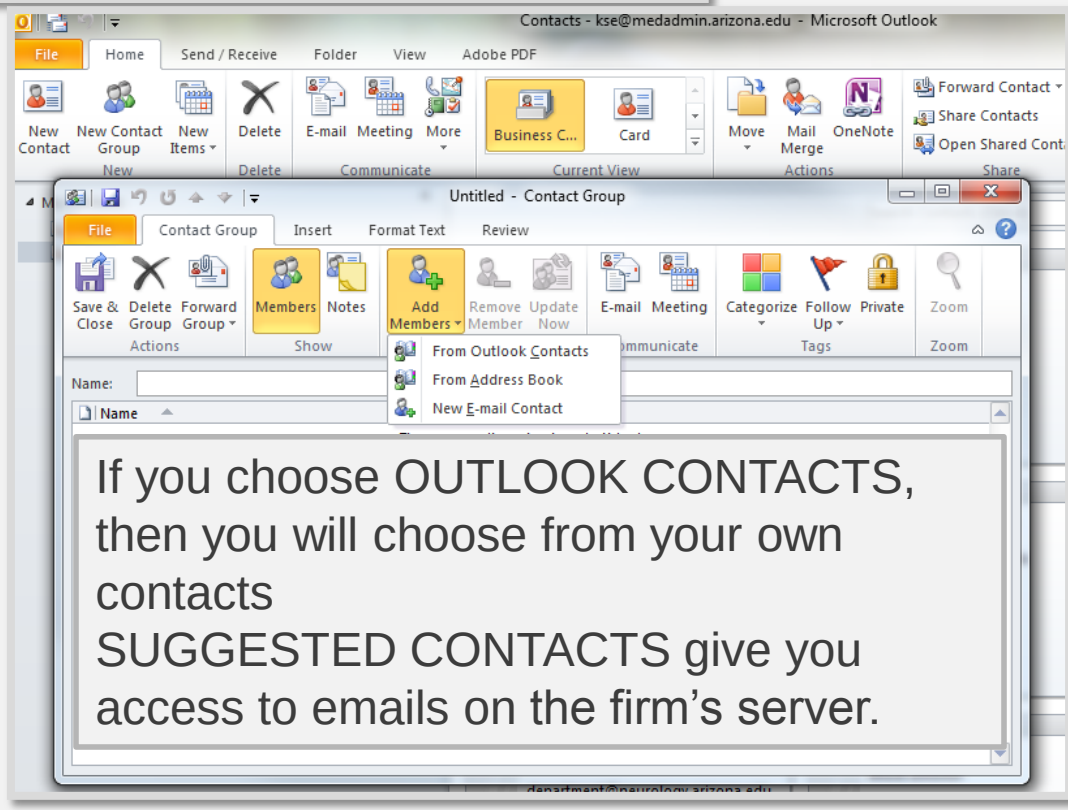
Now The Contact Reflects The New Category



Create Contact Groups

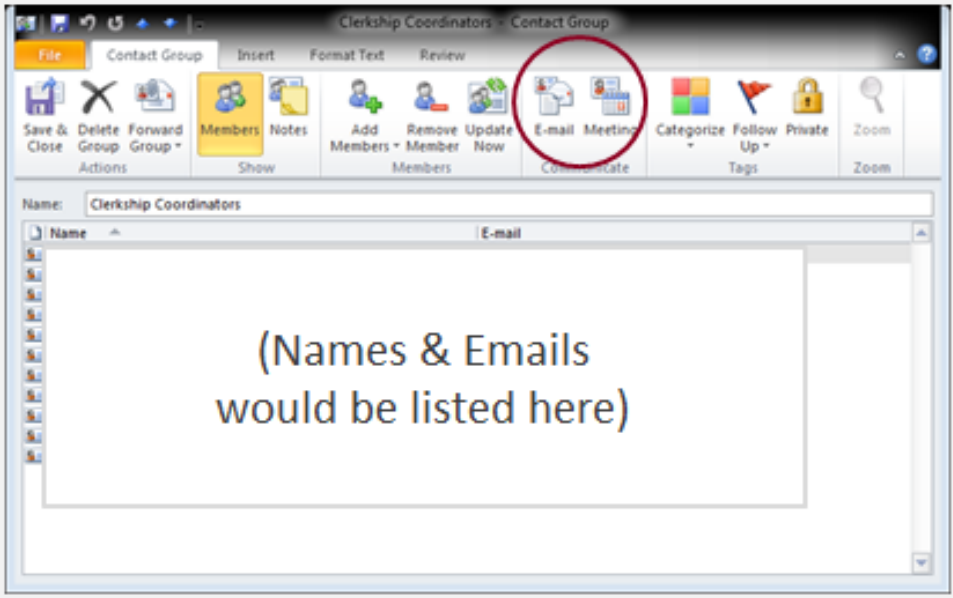


- ADD MEMBERS to a group of contacts from Outlook Contacts, Address Book or add new email contact.
- You may categorize your contact groups.

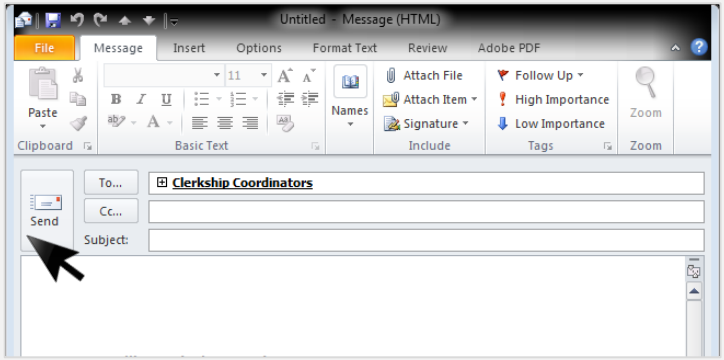


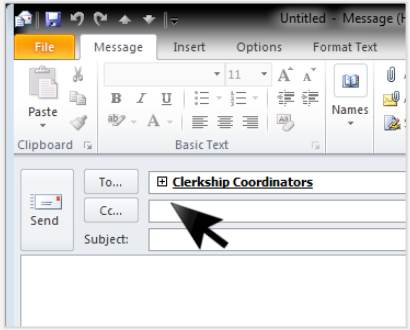
How Contact Groups Work

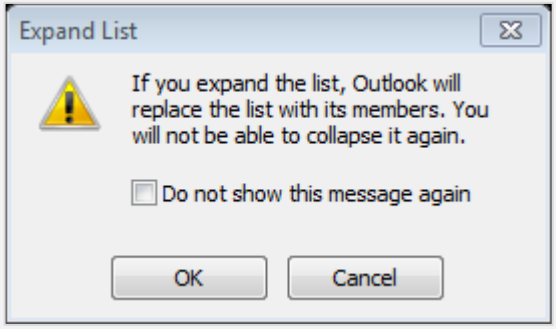
- A business card or other entry will appear in your contacts with the name of the group
- To view the members of the group, double click on the contact card
- Send emails to the entire group by clicking on E-mail or Set up a meeting for the group by clicking on Meeting.



How To Use Group Contacts







If you want to send to only part of the group…

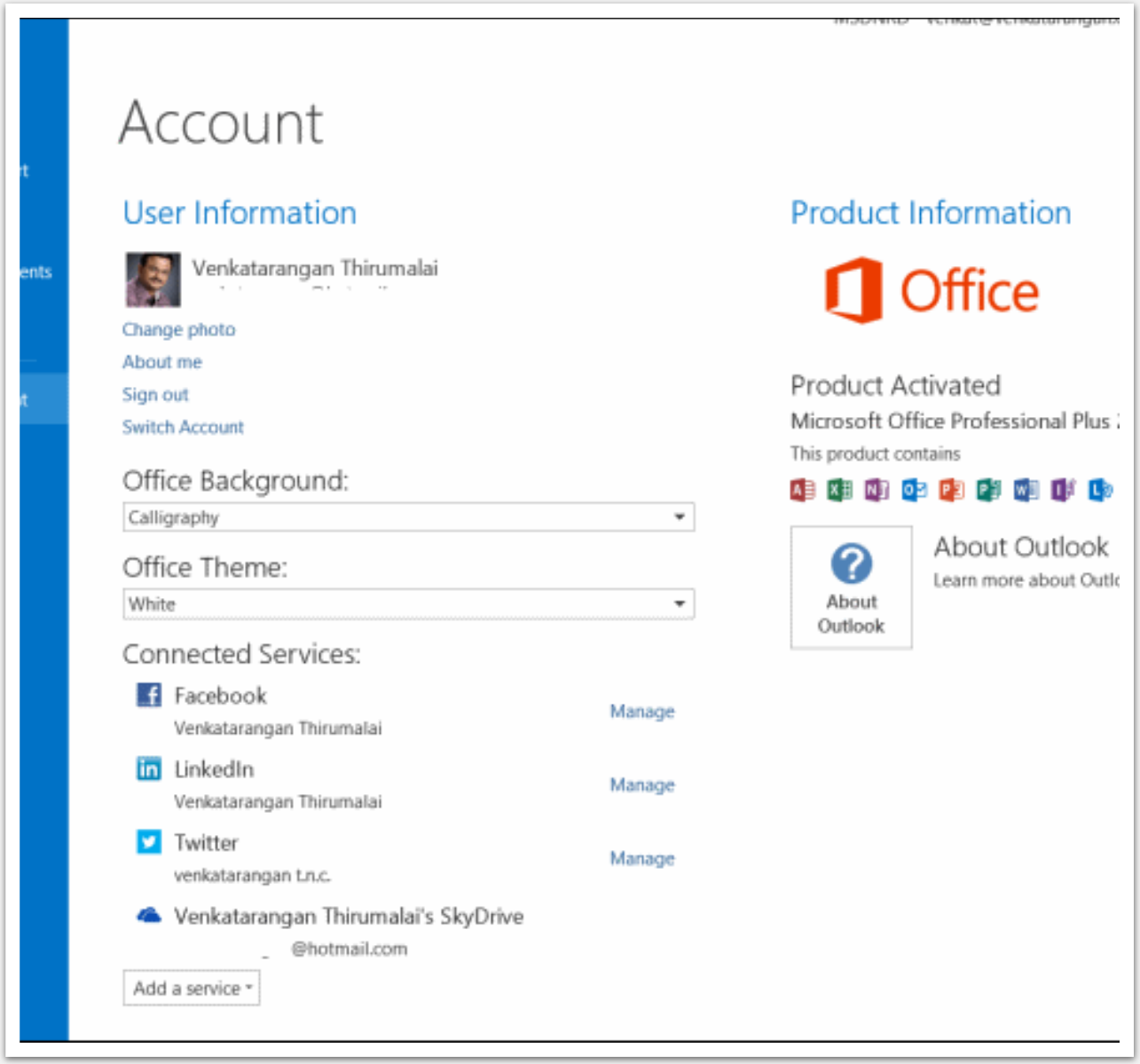
- Click the + sign to the left of the name of the group (left, middle image).
- You will see the “Expand List” dialogue box (bottom left image).
- The individual emails for each member will appear in the TO entry box, instead of the group name. Emails will be sent to each member individually. Or, you may remove members who should not be receiving this particular email.

WHAT'S DIFFERENT ABOUT

Outlook 2013

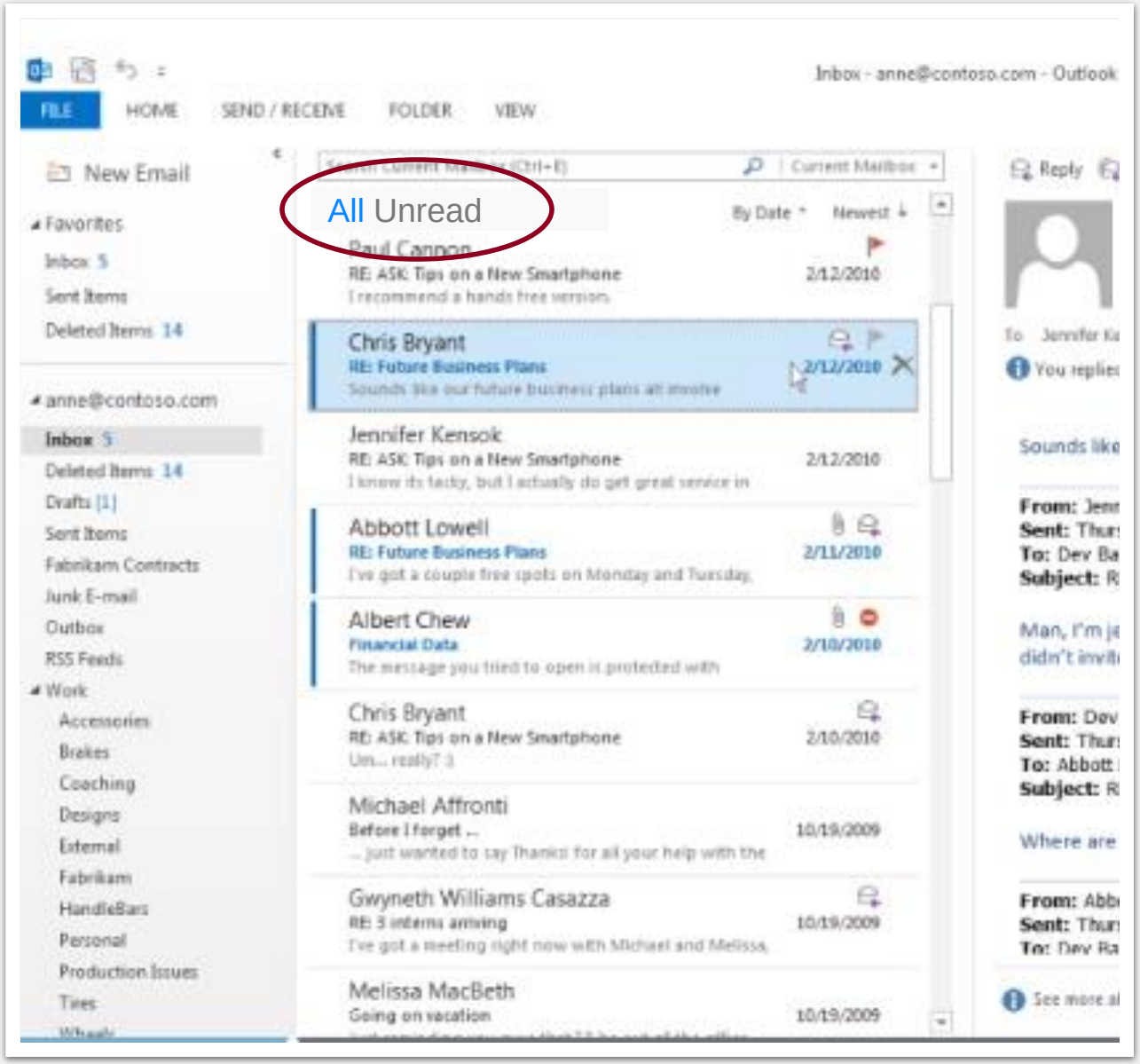
Manage Multiple Accounts

You can still manage multiple email accounts from Outlook 2013, and include multiple social media accounts

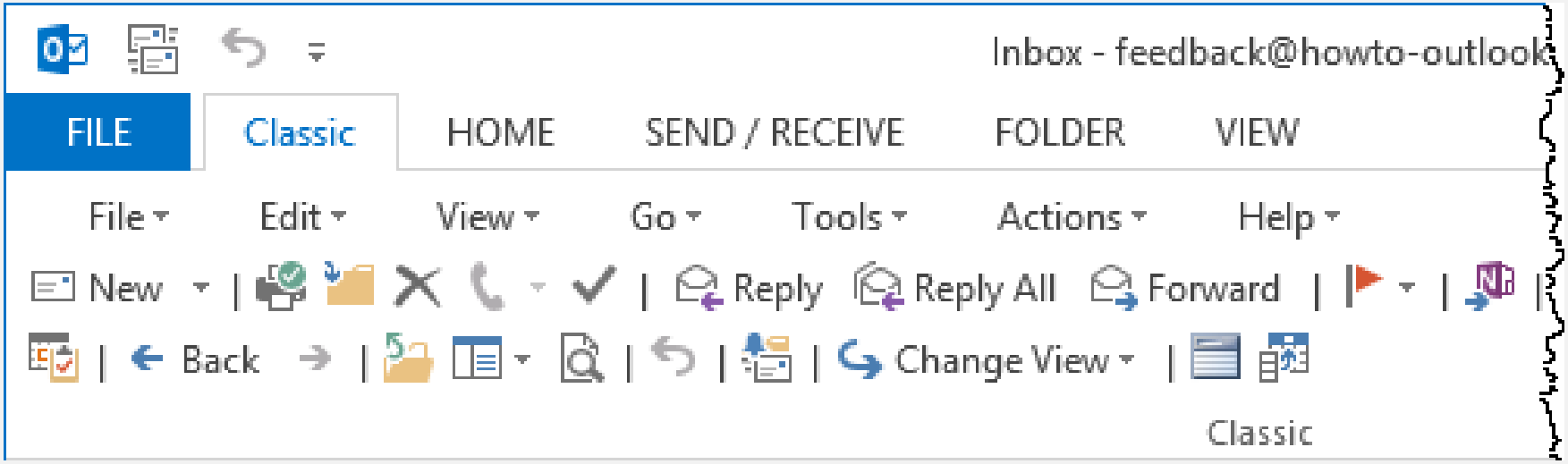


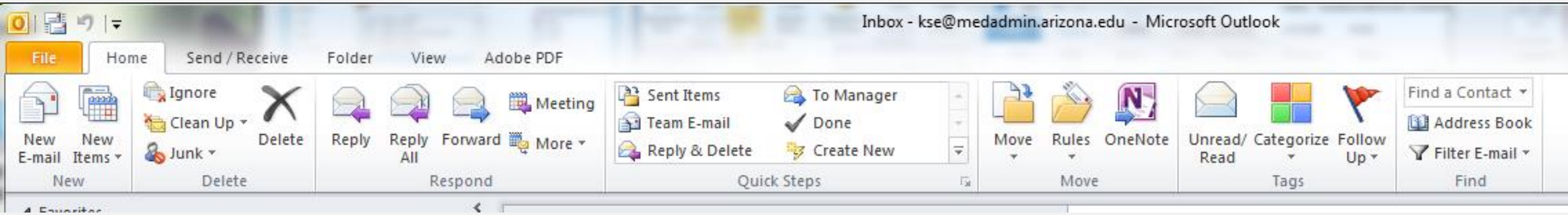
Toggle Filter

Transparent filter to toggle between ALL email in the Inbox or other folder and unopened emails.



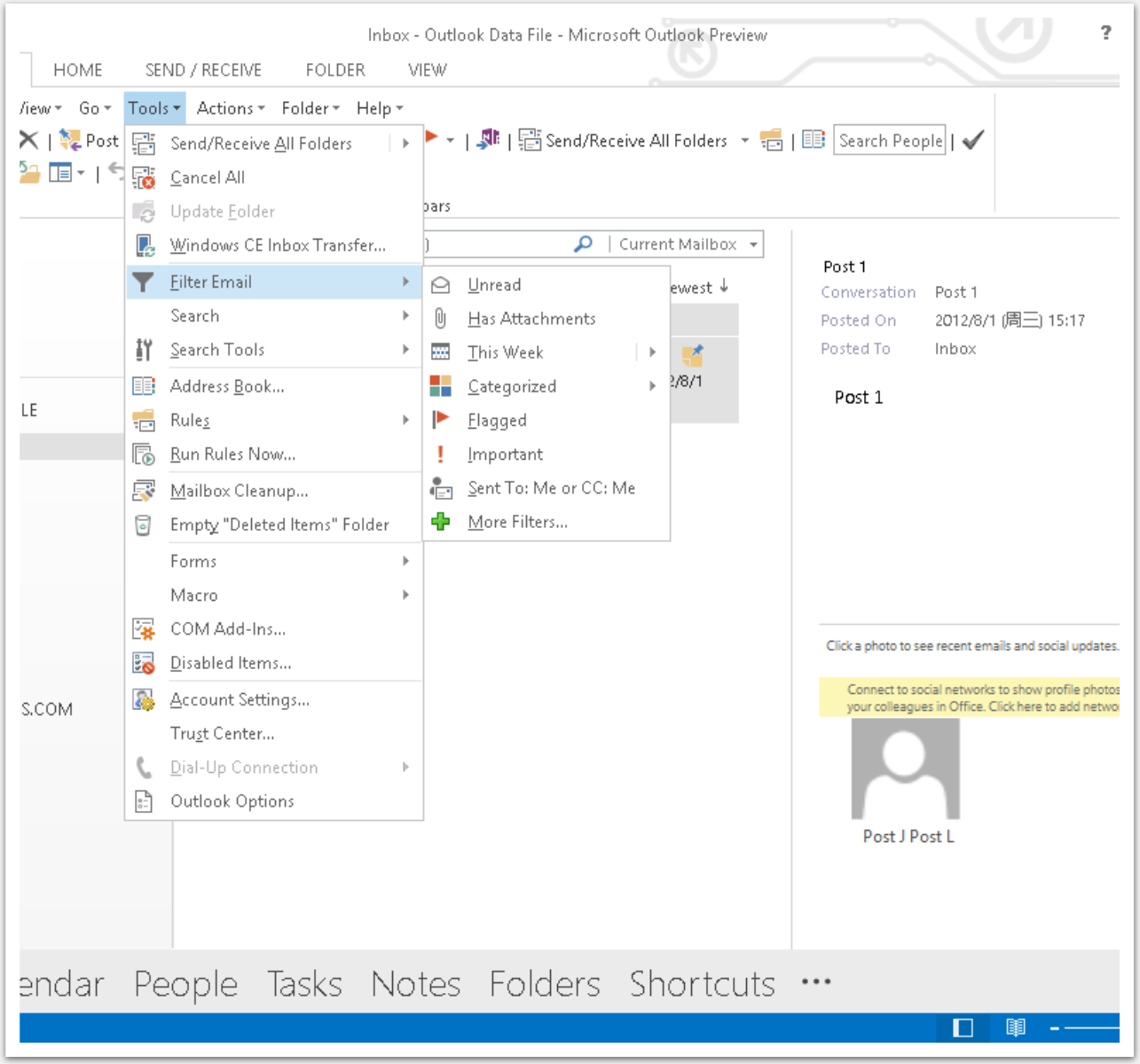
Classic View has all of the 2010 tools



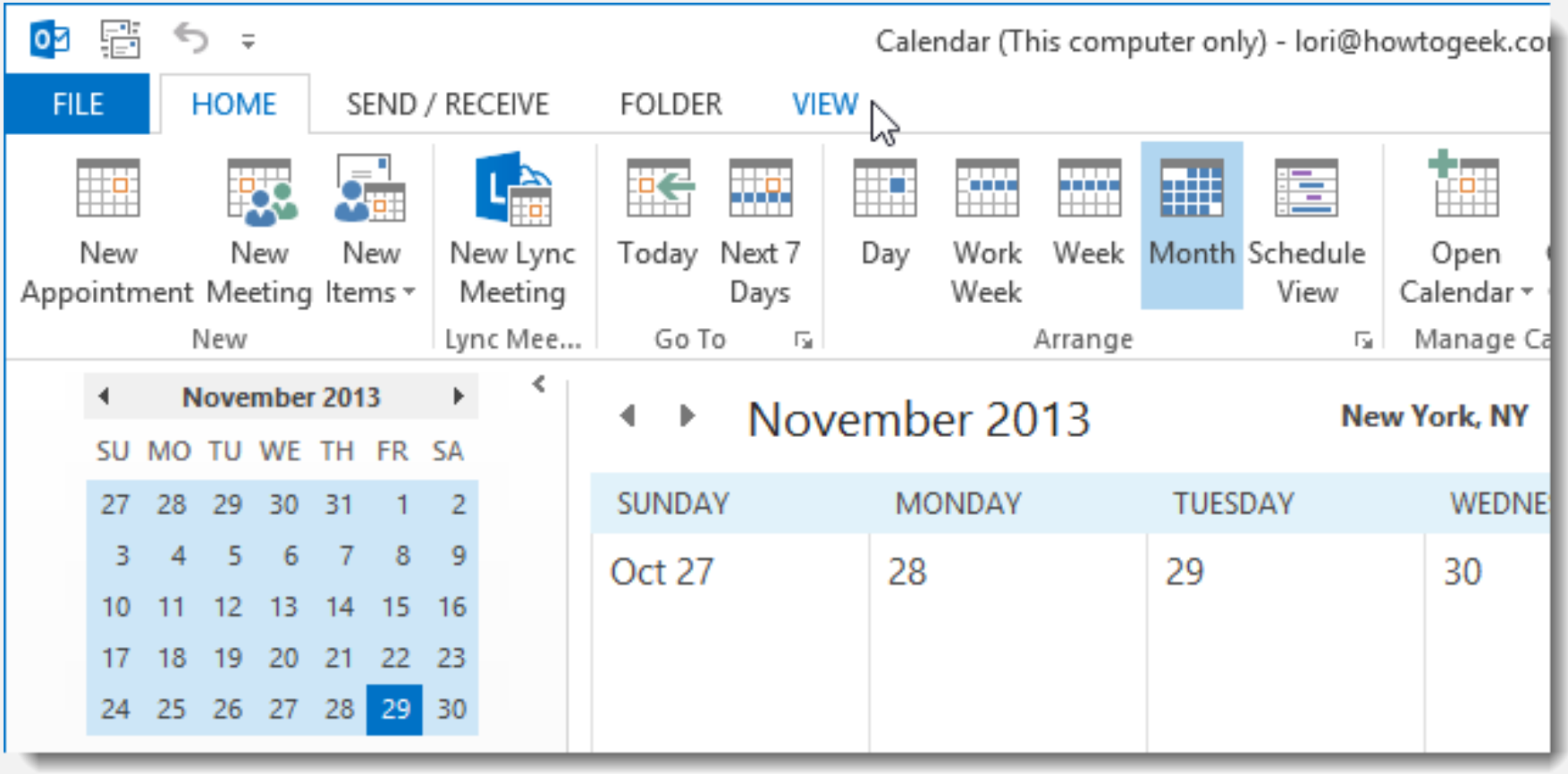


Classic View of Menus

"Tools" on the Classic Menu enables you to FILTER email, access your ADDRESS BOOK, create RULES, RUN rules, clean up your mailbox, and access your ACCOUNT SETTINGS and program OPTIONS.



HOME Menu


Calendar (This computer only) - lori@howtogeek.co
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Appointment
New Meeting
New Items
New
New Lync Meeting
Lync Mee...
Today
Next 7 Days
Go To
Day
Work Week
Week
Month
Schedule View
Arrange
Open Calendar
Manage Ca
November 2013
SU MO TU WE TH FR SA
27 28 29 30 31 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
November 2013
New York, NY
SUNDAY
MONDAY
TUESDAY
WEDNE
Oct 27
28
29
30

THANK YOU!

Karen