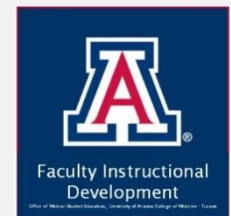


# A GUIDE TO MICROSOFT OFFICE\* --- OUTLOOK

Karen Spear Ellinwood, PhD, JD, EdS  
Director, Instructional Development  
UA College of Medicine  
Assistant Professor, Obstetrics & Gynecology



\*Microsoft Office is a Registered Trademark of Microsoft Corporation

# 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.

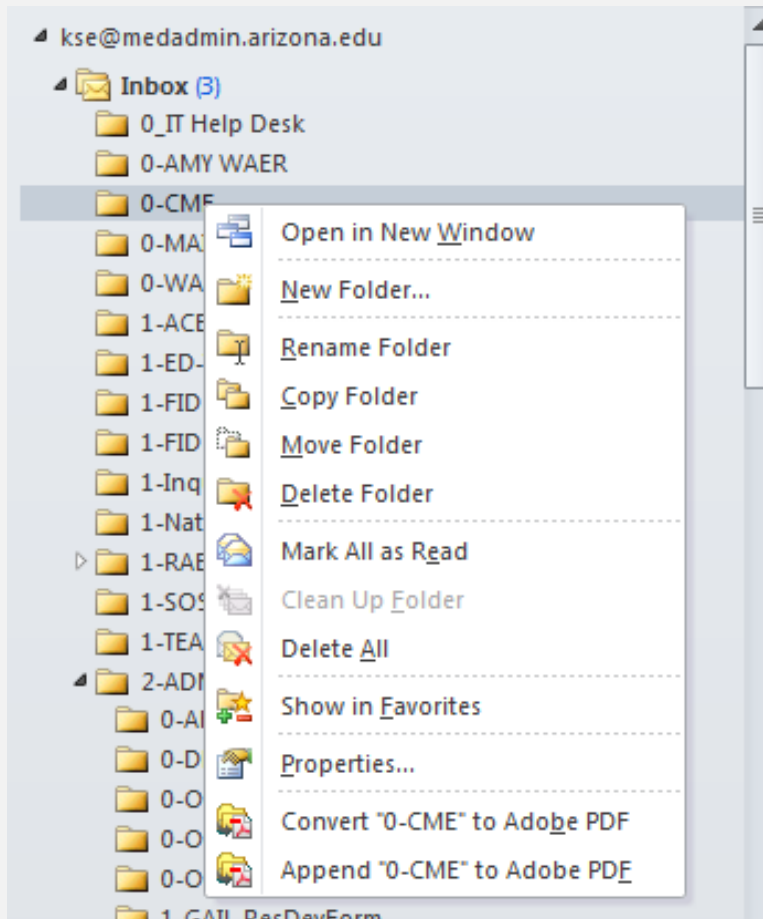
# MAIL

---

Folders, Rules & Filters

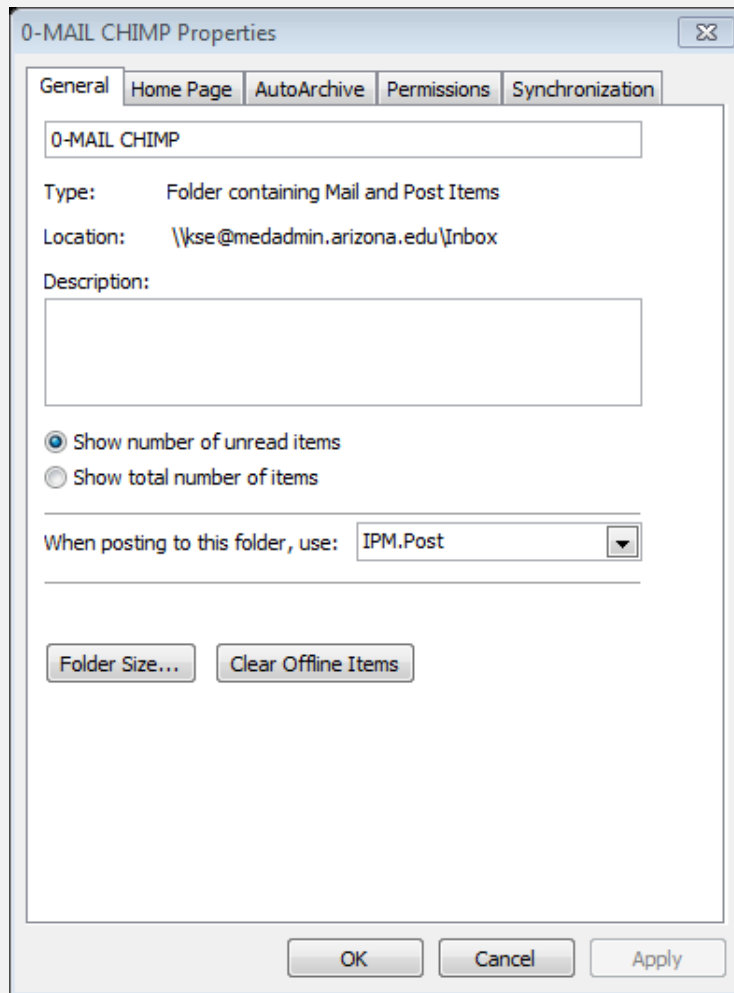


# Create and Manage Folders



- 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

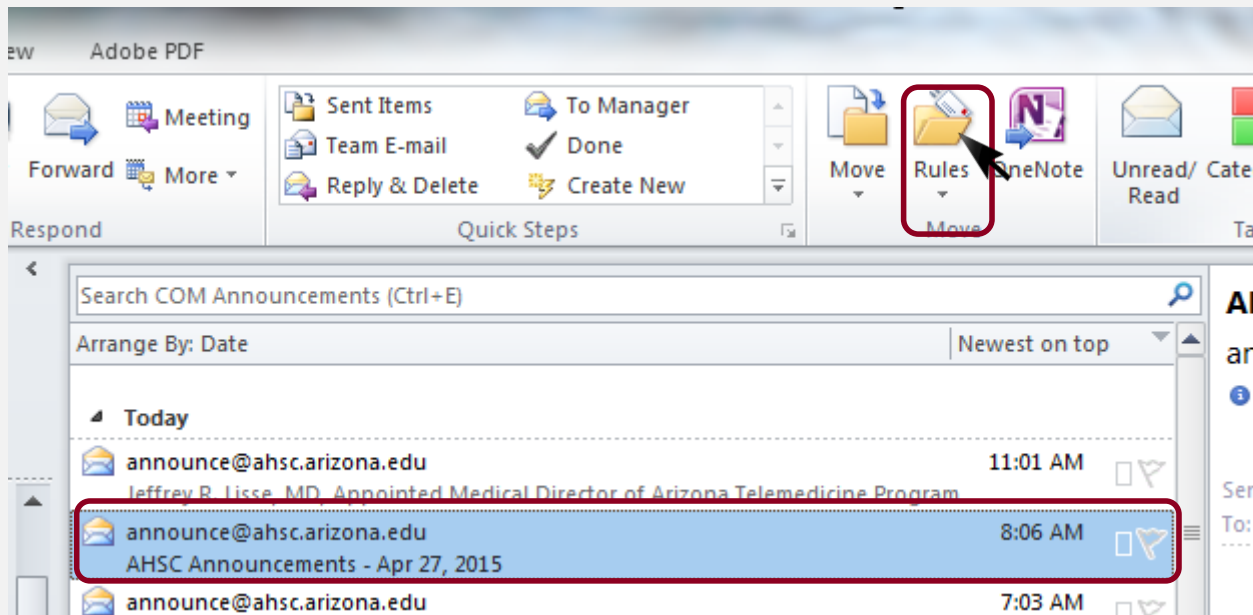


- Select PROPERTIES from the pop-up menu
- Manage settings for individual folders
- Change folder name
- Change settings, such as, whether the contents of this folder will be archived or deleted (emptied) and how often

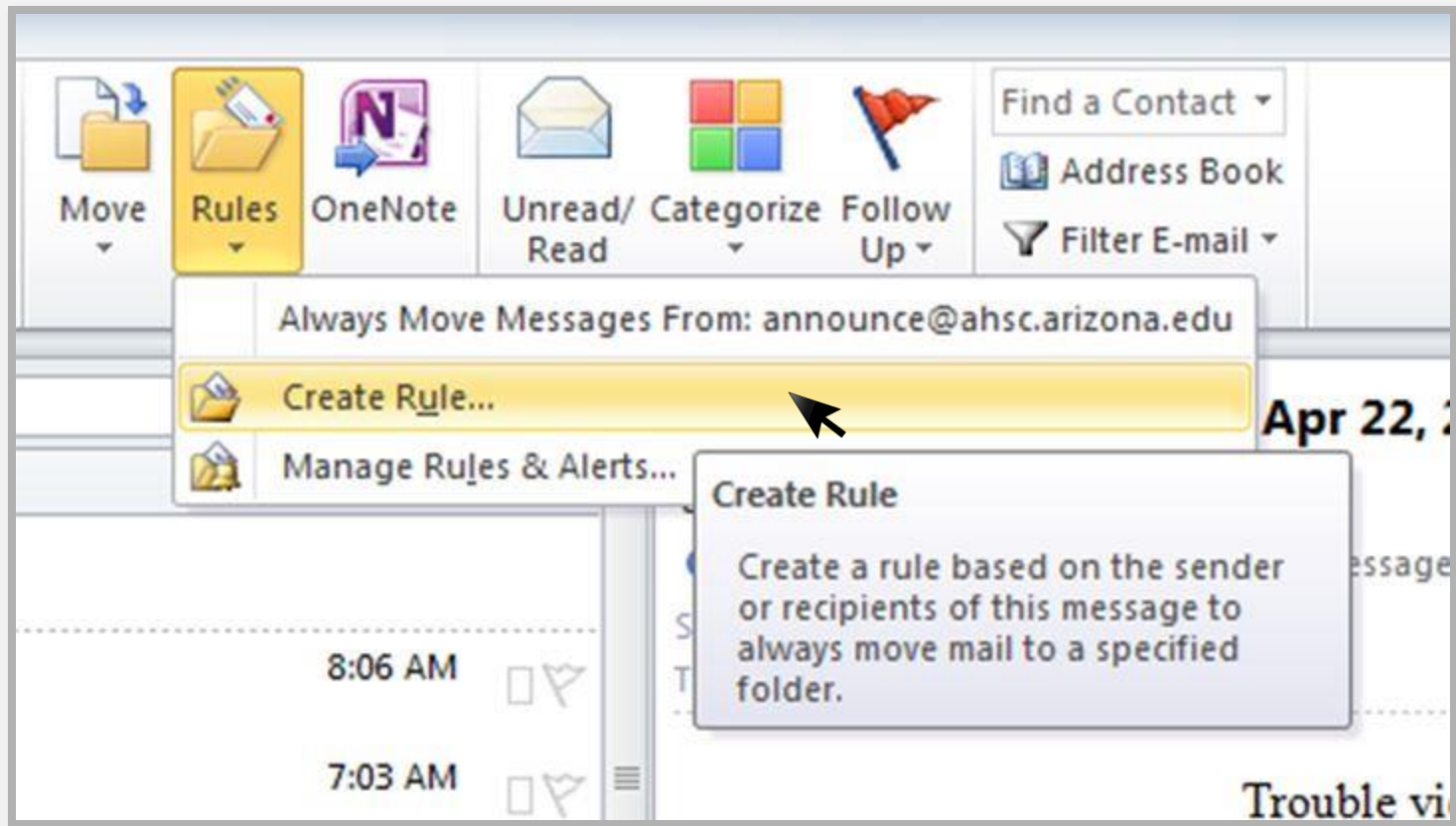
# Create & Manage Rules to Filter Emails



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



Create Rule if you are creating a rule for a folder, then click the box to the left

When I get e-mail with all of the selected conditions

From announce@ahsc.arizona.edu

Subject contains AHSC Announcements - Apr 22, 2015

Sent to me only

Do the following

Display in the New Item Alert window

Play a selected sound: Windows Notify.wav ▶ ■ Browse...

Move the item to folder: 1-FID Series Select Folder...

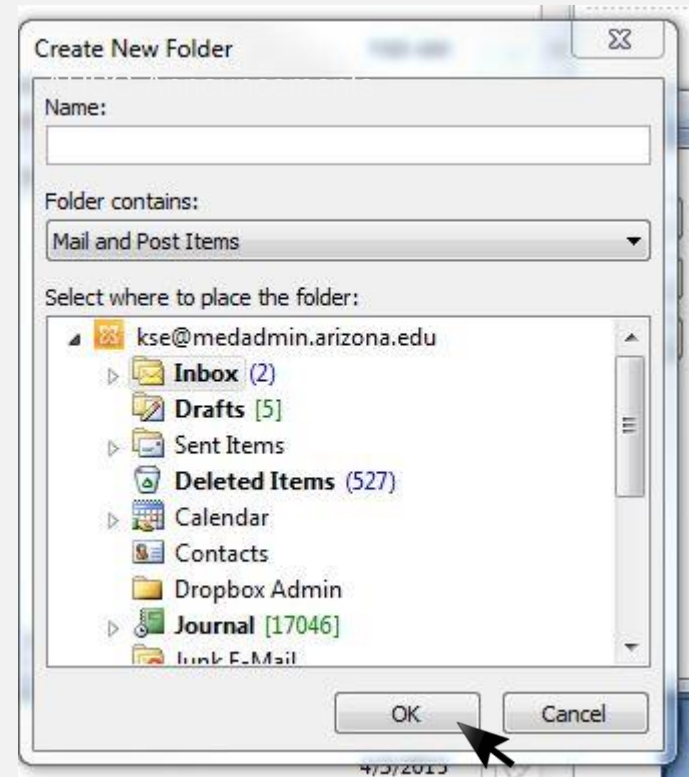
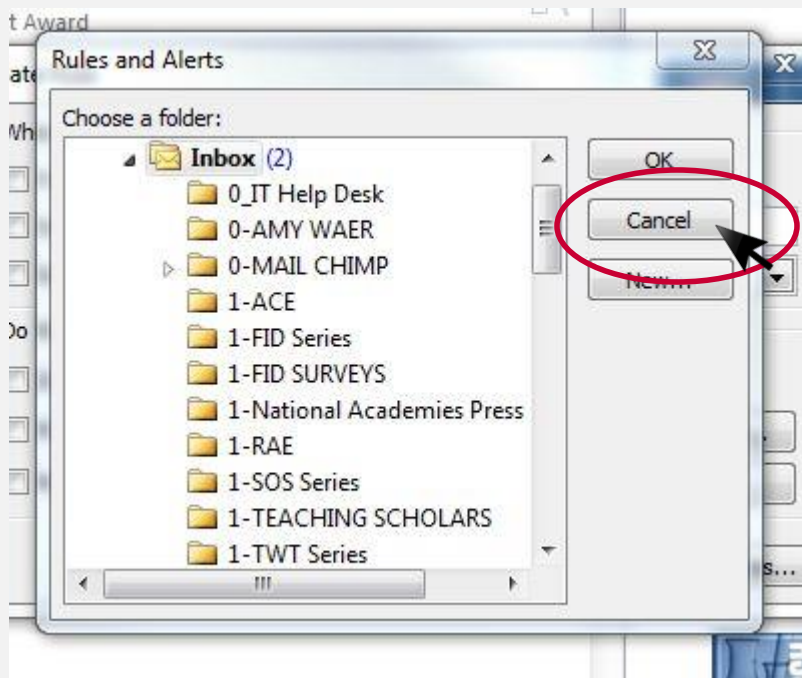
OK Cancel Advanced Options...

# 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

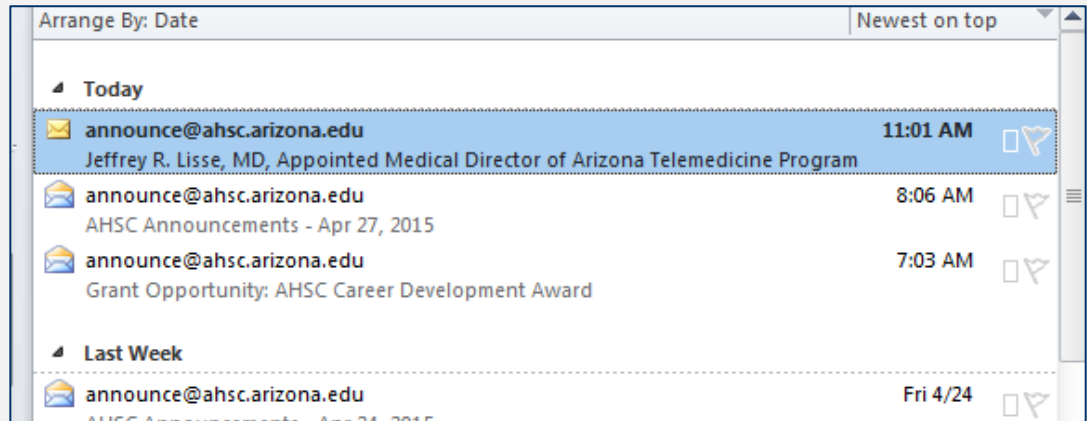


# Where to find your newly filtered emails



- 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](mailto: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

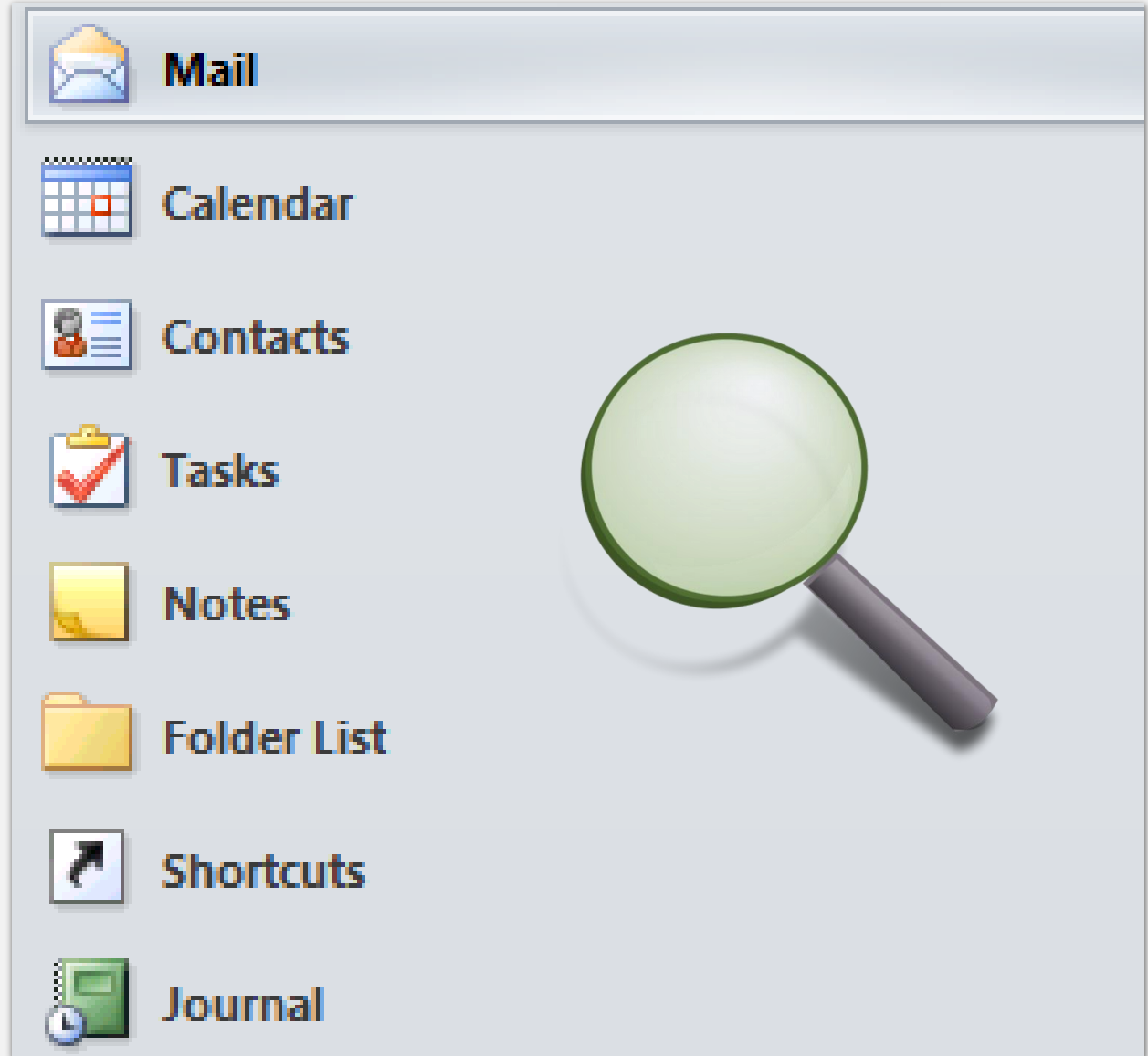


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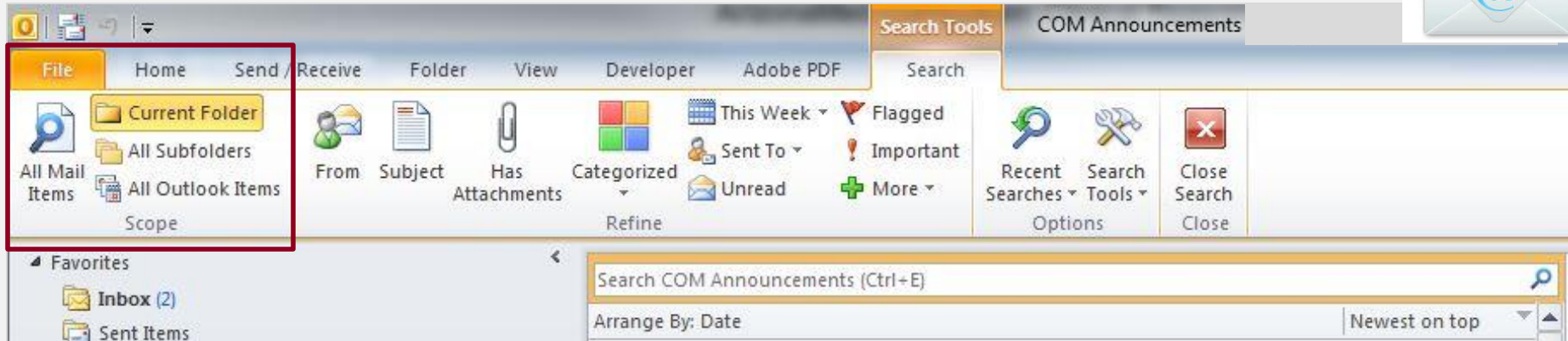
Email, Contacts, Tasks

# Advanced Search Functions

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



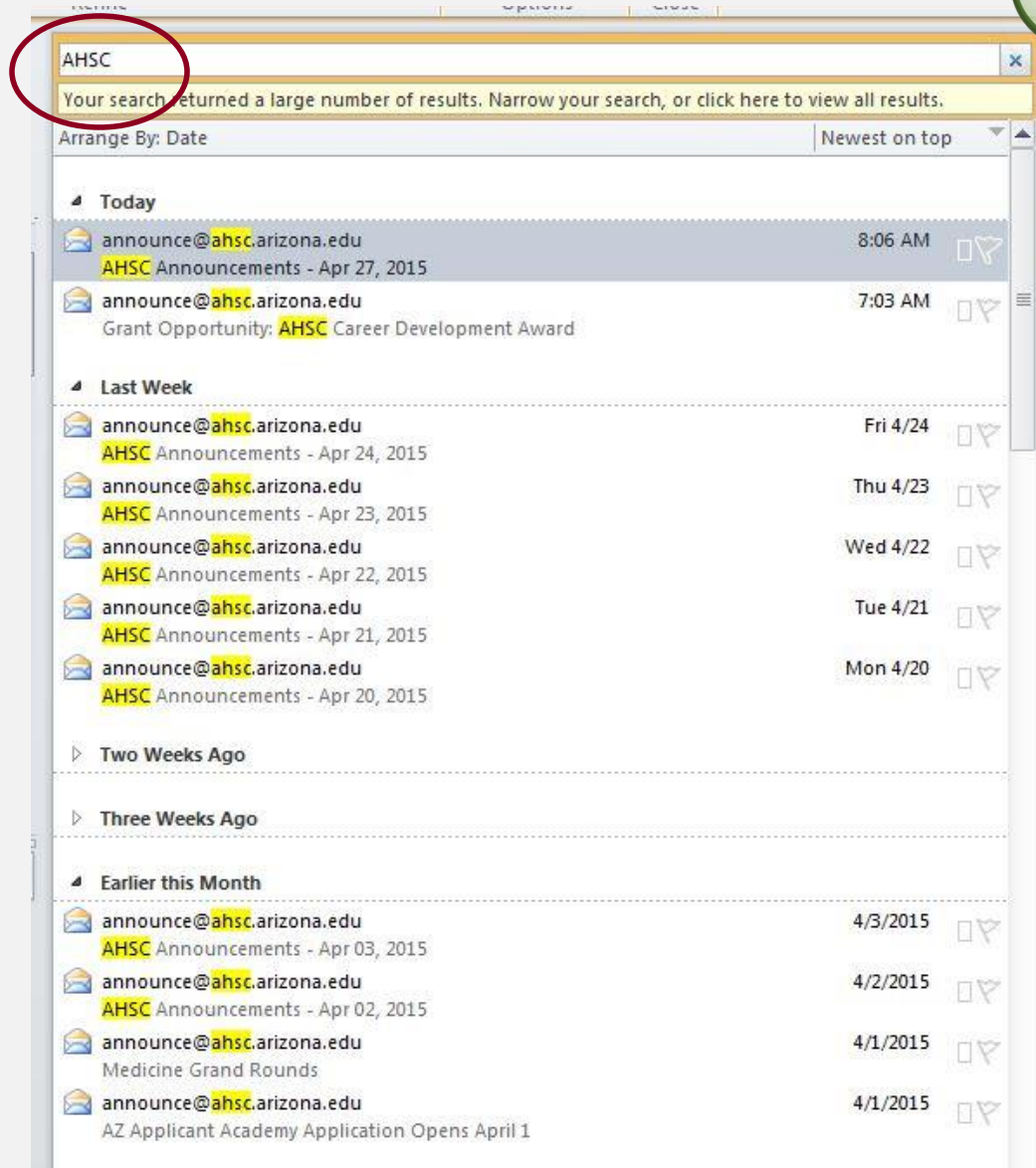
# Advanced Search functions



- 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





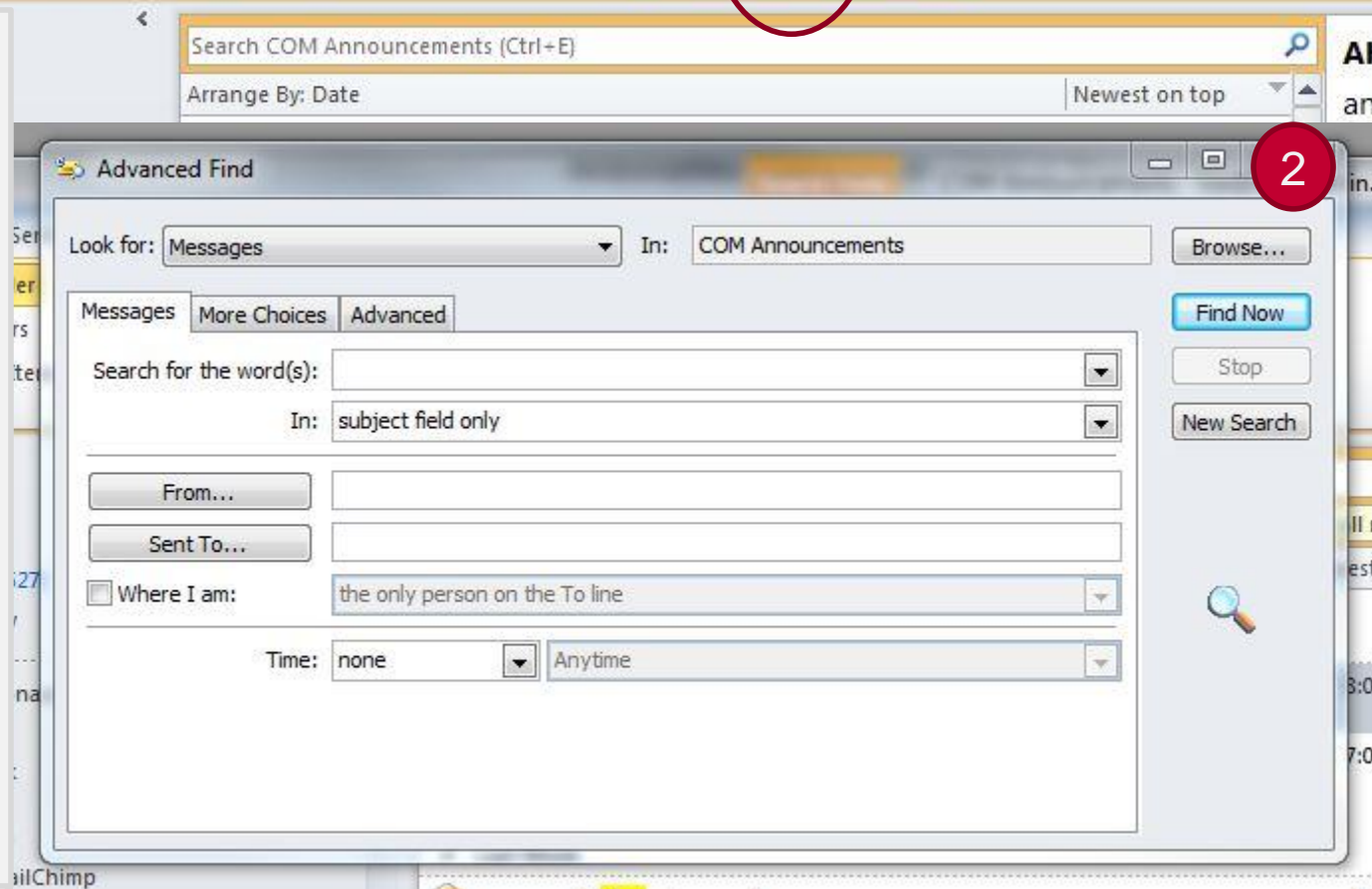
# Access All Advanced Search Tools at once



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

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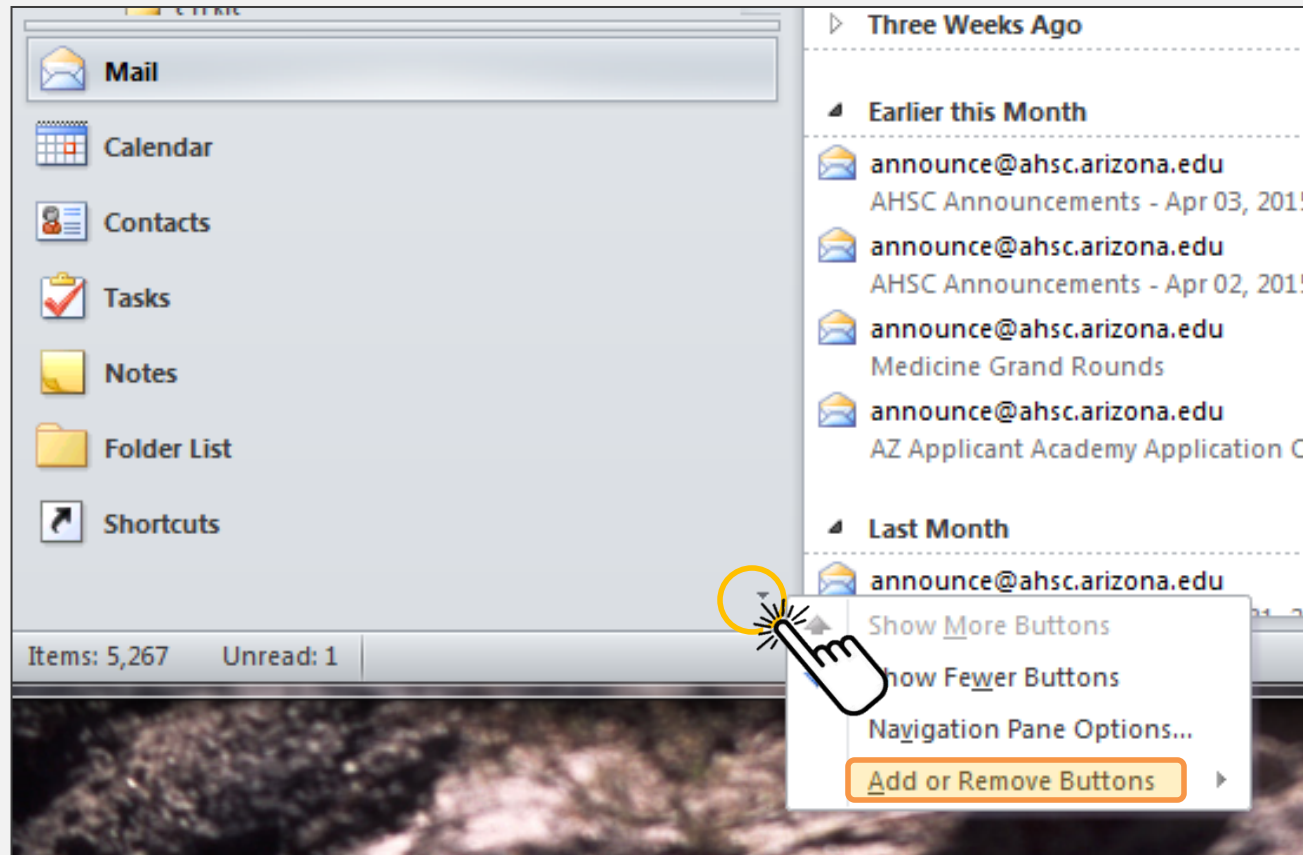
Track Productivity, Search Office Files via MS Outlook  
Advanced Search Features



# Journal

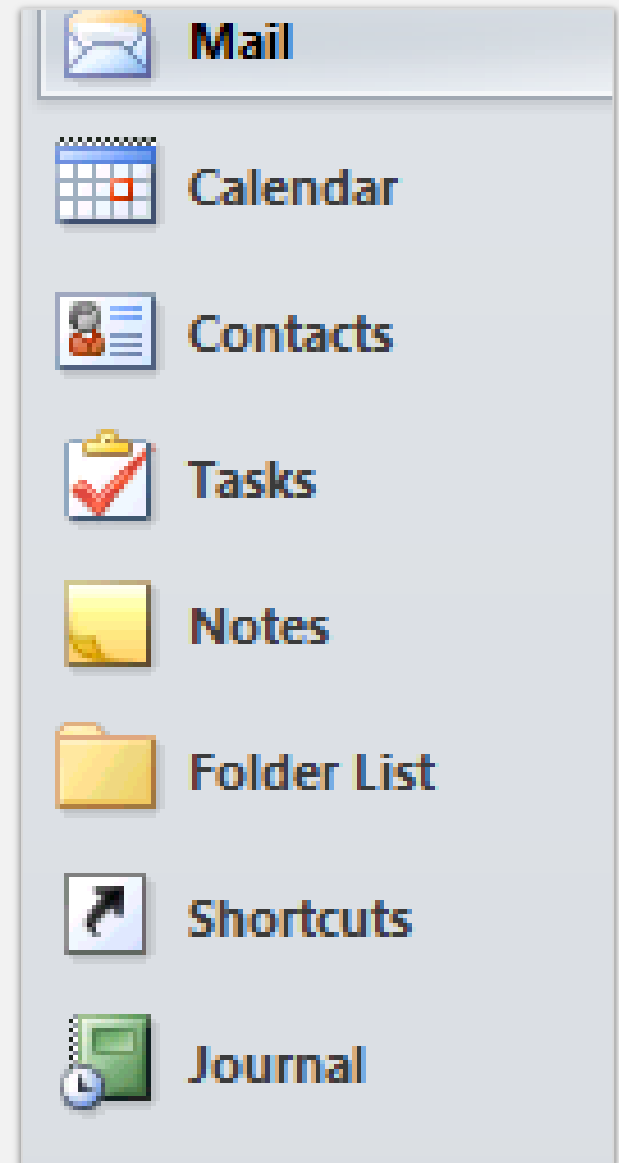
## How to Start the Journal Function

- **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”**

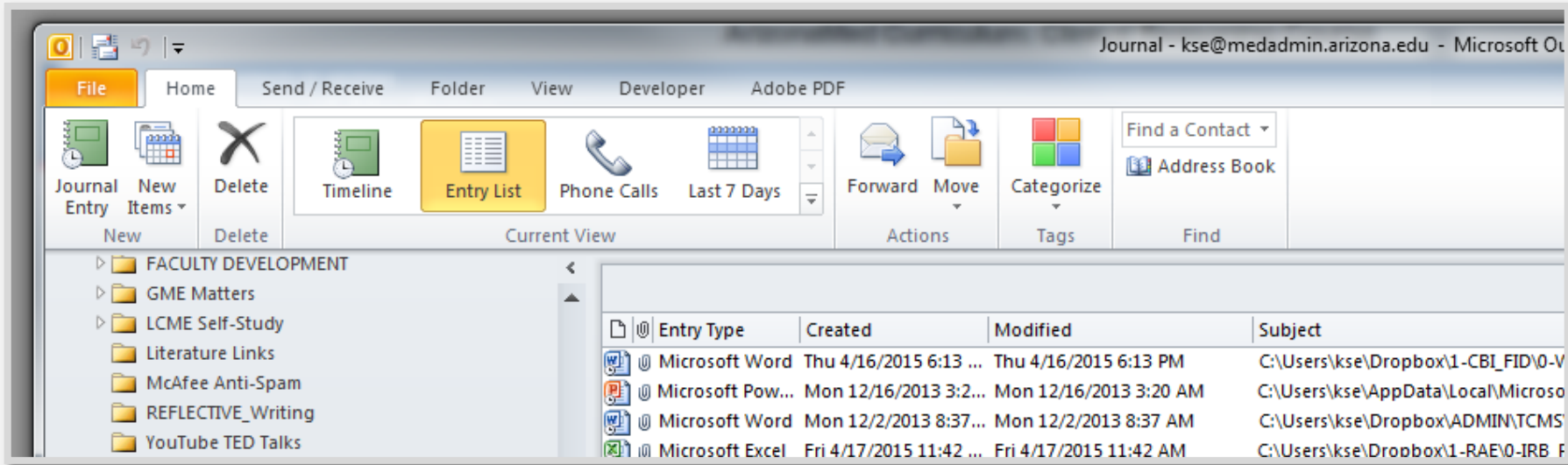


## Once you turn on the Journal...

- 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

The screenshot shows a software interface for managing journal entries. At the top, there is a toolbar with several icons and labels: 'Journal Entry', 'New Items', 'Delete', 'Today', 'Day', 'Week', 'Month', 'Timeline', 'Entry List', 'Phone Calls', and 'Last 7 Days'. Below this is a secondary toolbar with 'Timeline', 'Entry List', 'Phone Calls', 'Last 7 Days', 'Forward', 'Move', 'Categorize', 'Find a Contact', and 'Address Book'. The main area displays a calendar for April 2015 with a list of journal entries below it.

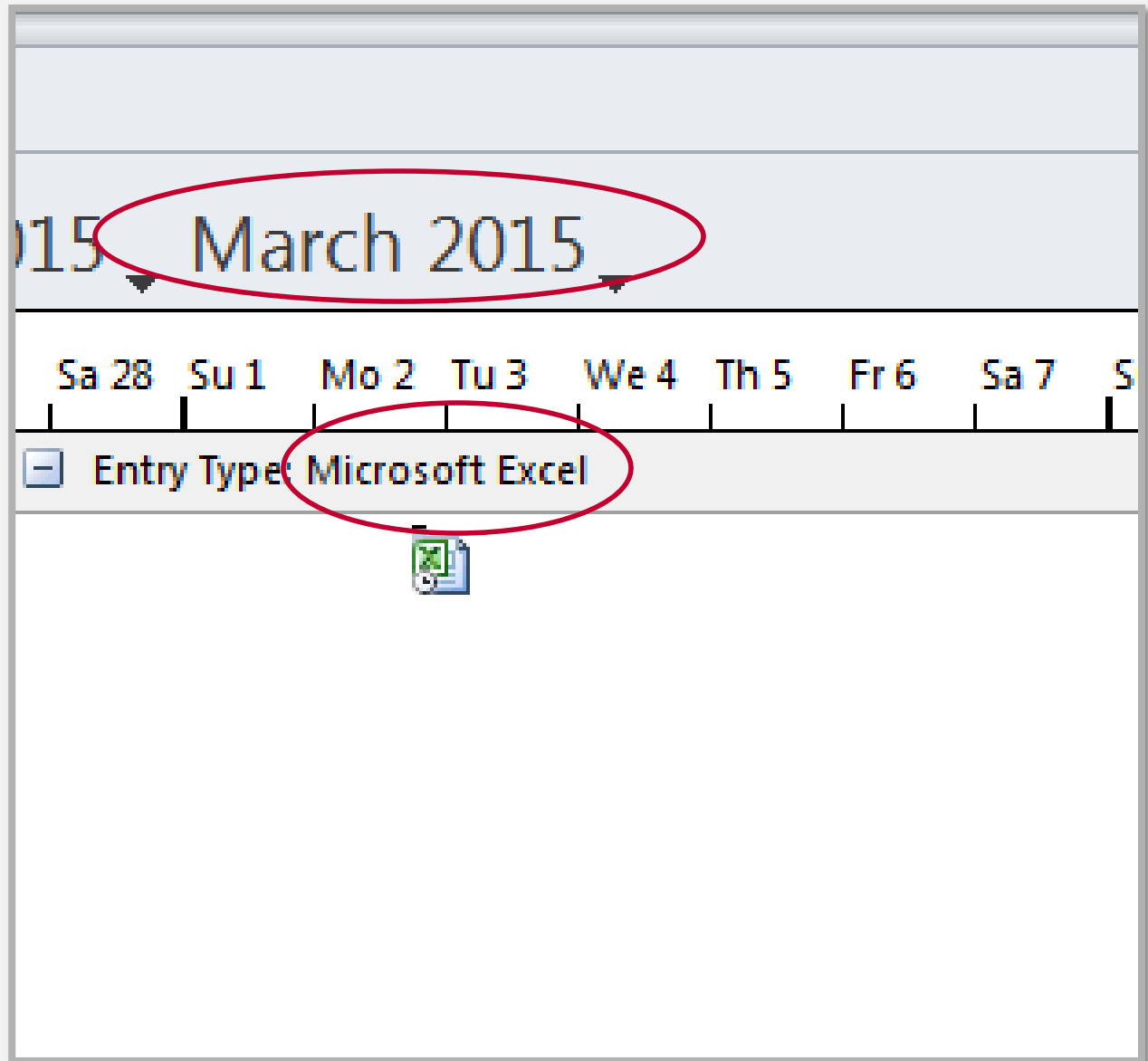
April 2015

Mon 6	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11	Sun 12	Mon 13	Tue 14	Wed 15	Thu 16	Fri 17	Sat 18	Sun 19
Entry Type: Microsoft Excel													
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\0-ThinkShare_Class-2016\2016_ThoughtT...						C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2014_WGEA\2014_TS_data_Class2016\Individua...							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\Data_Analysis\Activity_Analysis_Class...						C:\Users\kse\Documents\2-FID_CBI\WGEA\2015_WGEA\Copy of Class of 2016 - Tucson.x...							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\Data_Analysis\Data_Set-up_Kse.xlsx						C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\Copy of Class of 2016 - Tucson.xlsx							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\Data_Analysis\Data_Set-up_Kse.xlsx						C:\Users\kse\Dropbox1-RAE\0-IRB_RESEARCH\Data Analysis\RA...							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\Data_Analysis\Data_Analysis_Kse.xlsx						C:\Users\kse\Dropbox1-RAE\0-IRB_RESEARCH\Data Analysis\R...							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\2016-data.csv						C:\Users\kse\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Ou...							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\2016-data.xlsx						C:\Users\kse\Documents\2-FID_CBI\WGEA\2015_WGEA\Copy of Class2016_DataAnalysis2_...							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\2016-data.txt						C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\Copy of Class2016_DataAnalysis2_kse.x...							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\Data_Analysis\CrossTab-Data.csv						C:\Users\kse\Dropbox1-RAE\0-IRB_RESEARCH\RAE_Orientation_PE_Participants.xlsx							
C:\Users\kse\Dropbox1-CBI_FID\0-WGEA\2015\Data_Analysis\CrossTab-Data.xlsx						C:\Users\kse\Dropbox1-RAE\0-IRB_RESEARCH\RAE_Orientatic							

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

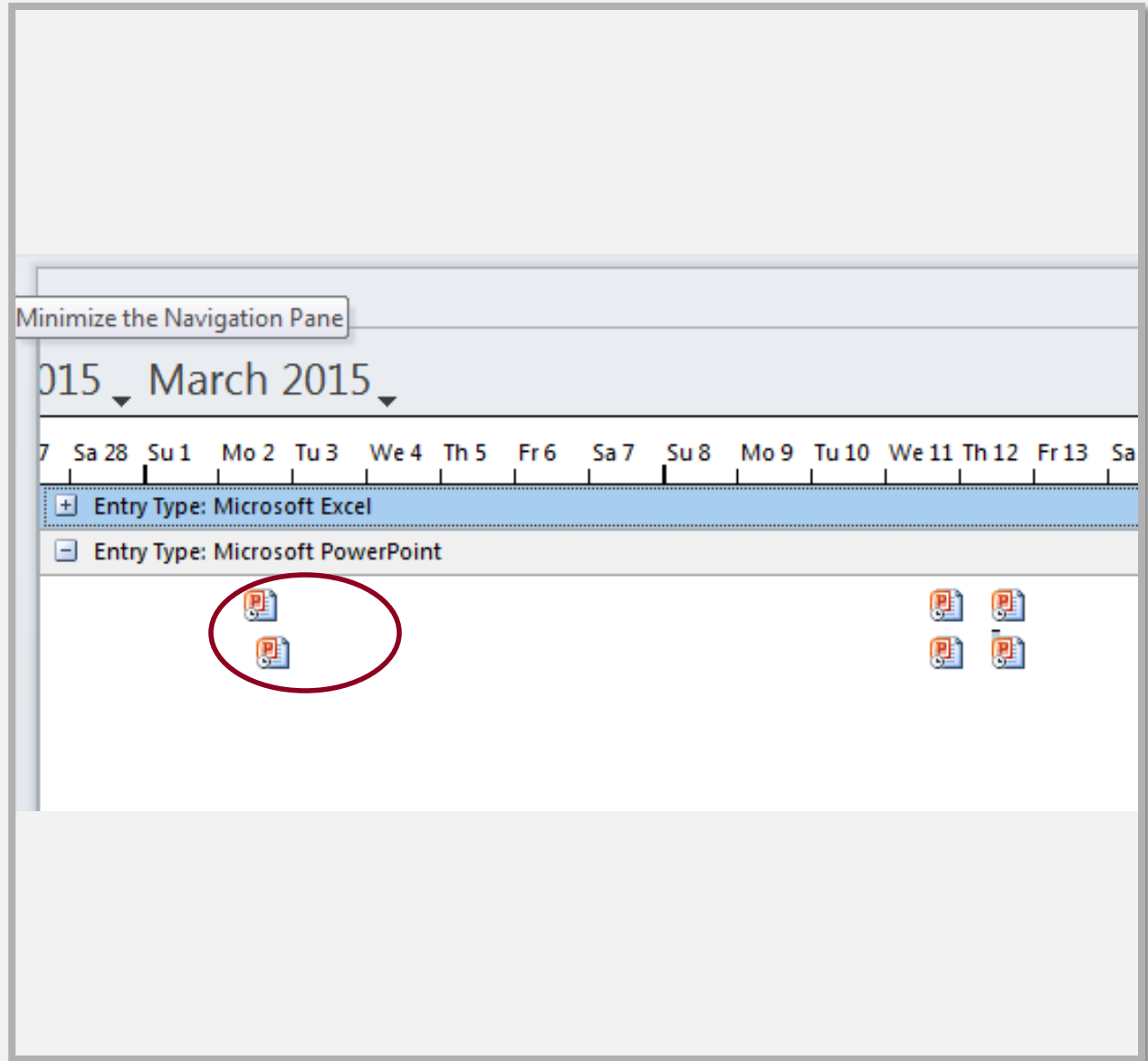
Journal Entries  
may be sorted  
by...

- 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

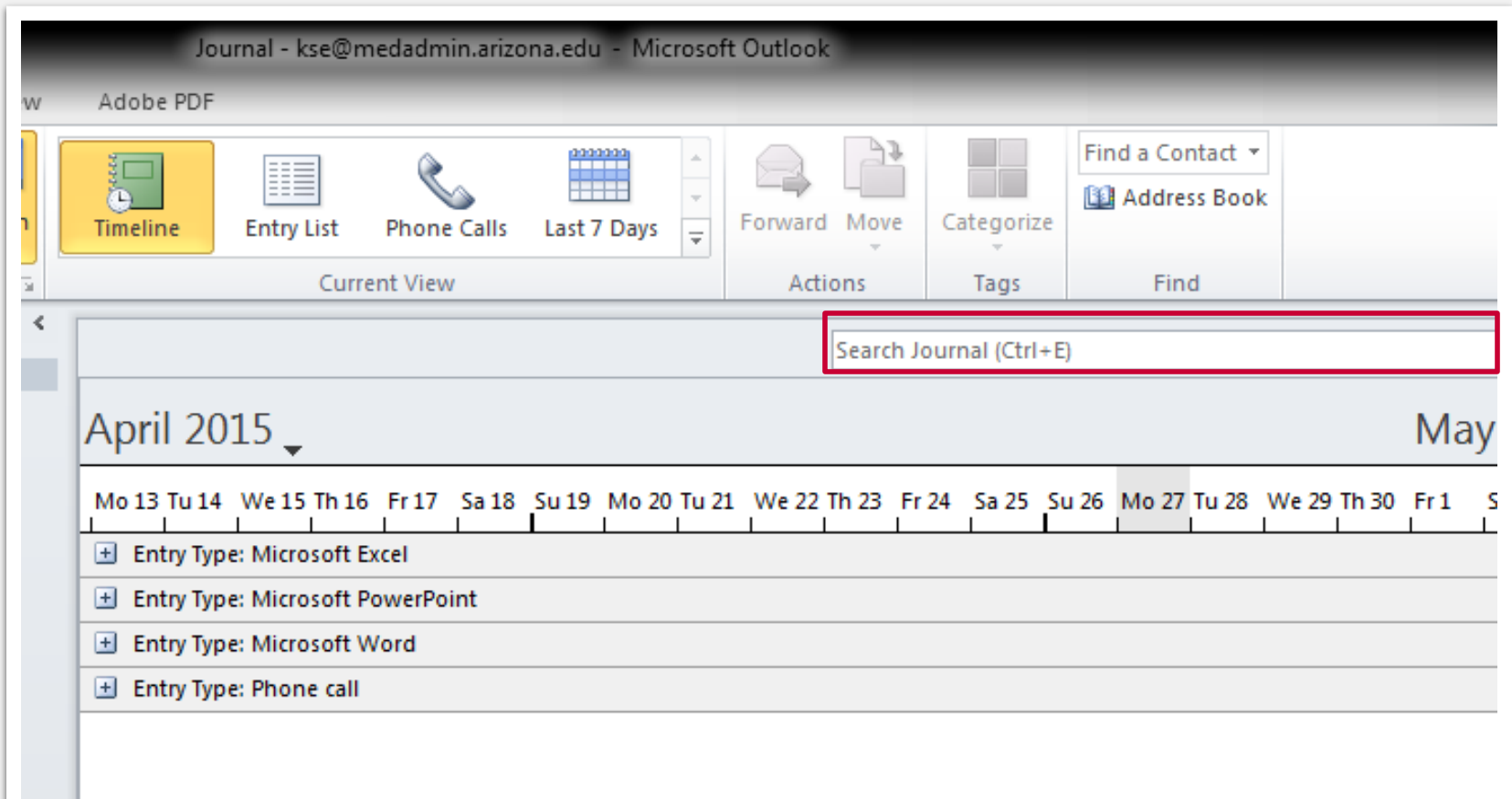




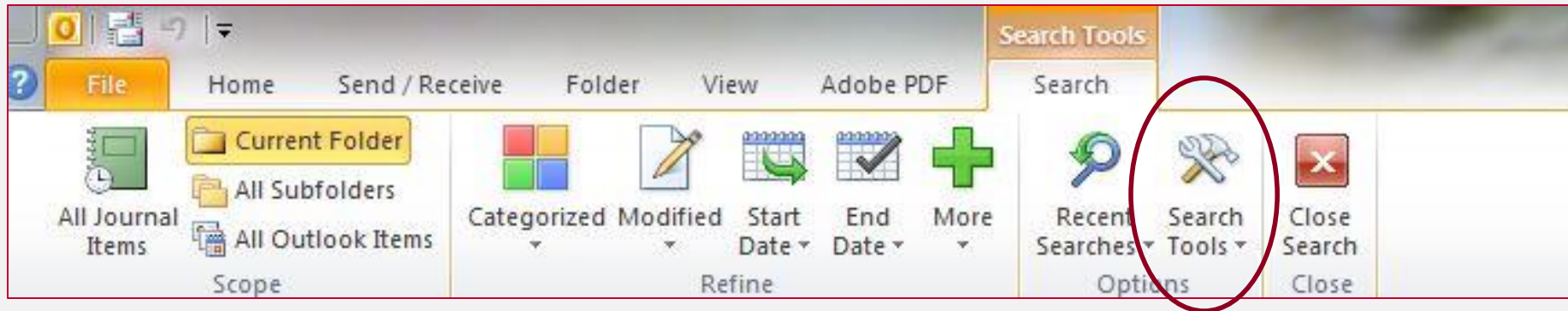
# Search Journal Entries

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...**

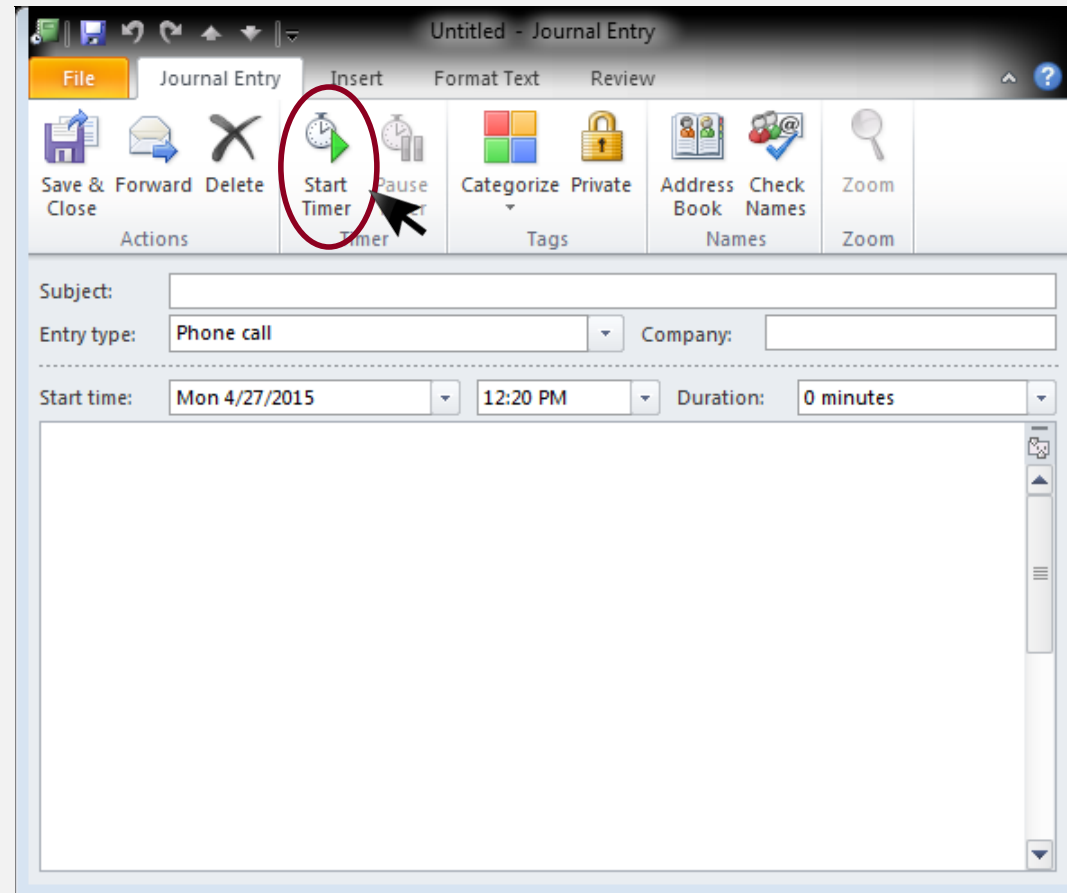
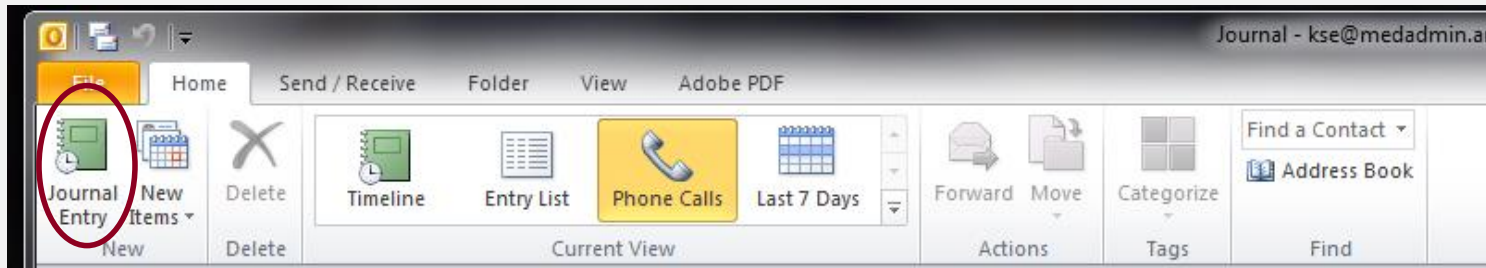


# Search Journal Entries



- 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?**

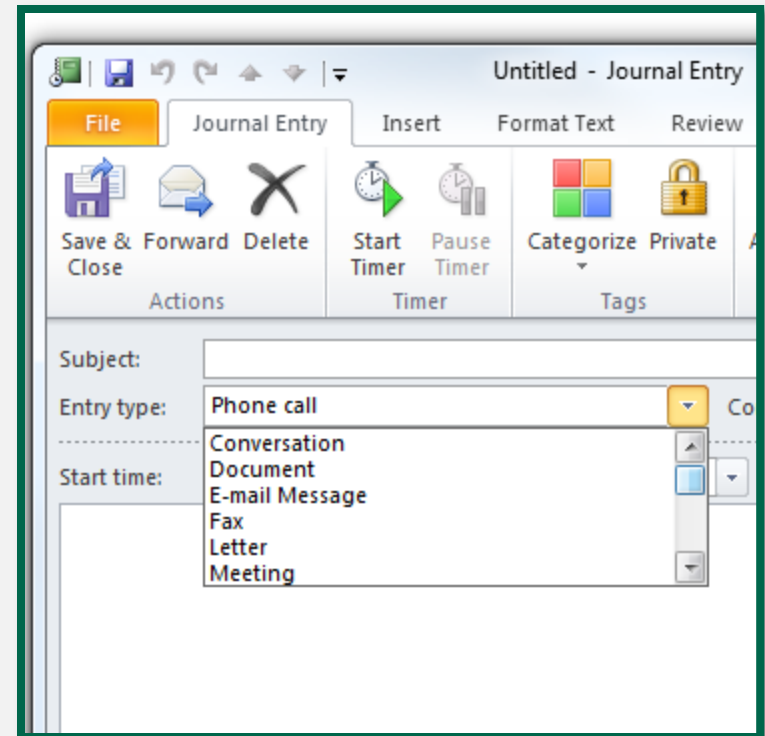
If you're tracking the time you spend on a task that is NOT automatically tracked by MS Outlook.

- **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

Manage All Views

Views for folder "Journal":

View Name	Can Be Used On	View Type
<Current view settings>	All Journal folders	Table
Timeline	All Journal folders	Timeline
Entry List	All Journal folders	Table
Phone Calls	All Journal folders	Table
Last 7 Days	All Journal folders	Table

Description  
Fields: Icon, Attachment, Entry Type, Subject, Start, Duration, Contact,  
Group By: None  
Sort: Start (descending)  
Filter: Journal Entries: Advanced

Only show views created for this folder

OK Apply View Close

2

Create a New View

Name of new view:  
Draft Documents

Type of view:  
Table  
Timeline  
Card  
Business Card  
Day/Week/Month  
Icon

Can be used on  
 This folder, visible to everyone  
 This folder, visible only to me  
 All Journal folders

OK Cancel

3

Advanced View Settings: Draft Documents

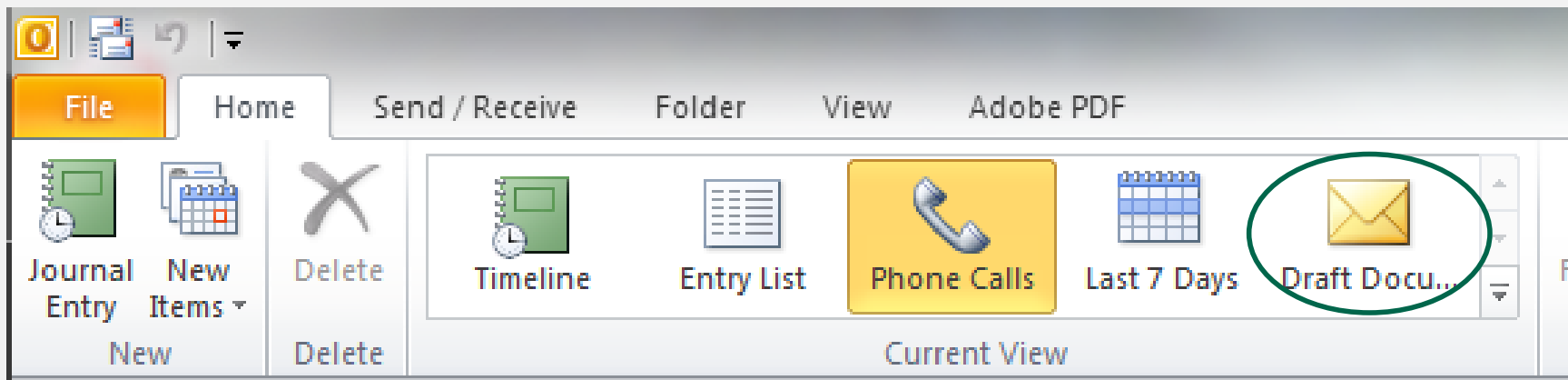
Description  
Columns... Icon, Attachment, Entry Type, Subject, Start, Duration, Co...  
Group By... None  
Sort... Start (descending)  
Filter... Off  
Other Settings... Fonts and other Table View settings  
Conditional Formatting... User defined fonts on each message  
Format Columns... Specify the display formats for each field

Reset Current View OK Cancel

Filter  
Journal Entries More Choices Advanced SQL  
Find items that match these criteria:  
<Add criteria from below to this list>  
Remove  
Define more criteria:  
Field Condition Value  
Keywords contains DRAFT  
Add to List  
OK Cancel Clear All

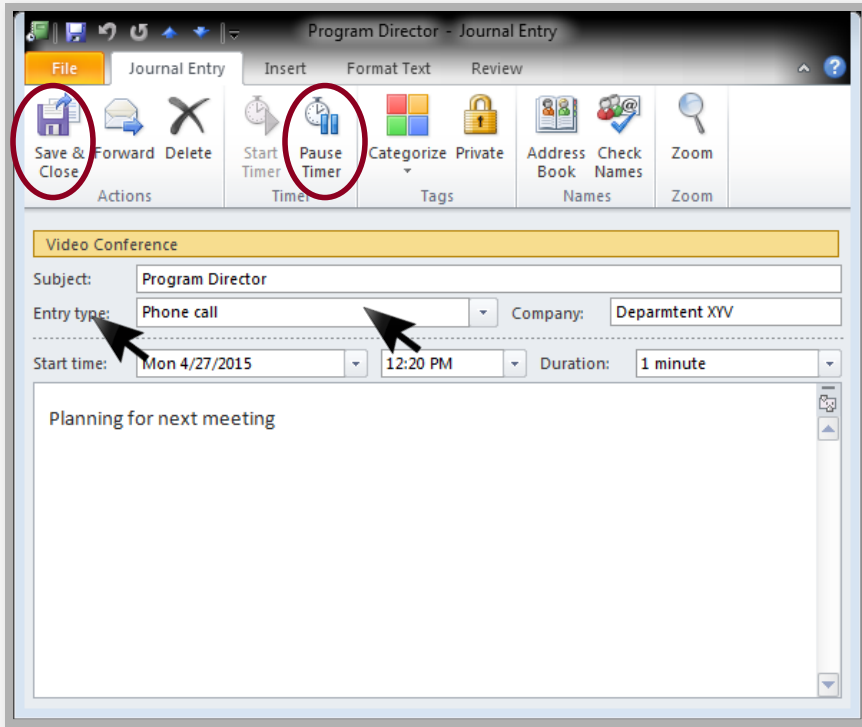
File Home Send / Receive Folder View Adobe PDF

Journal Entry New Items  
Delete  
Timeline Entry List Phone Calls Last 7 Days Draft Docu...  
Delete  
Current View



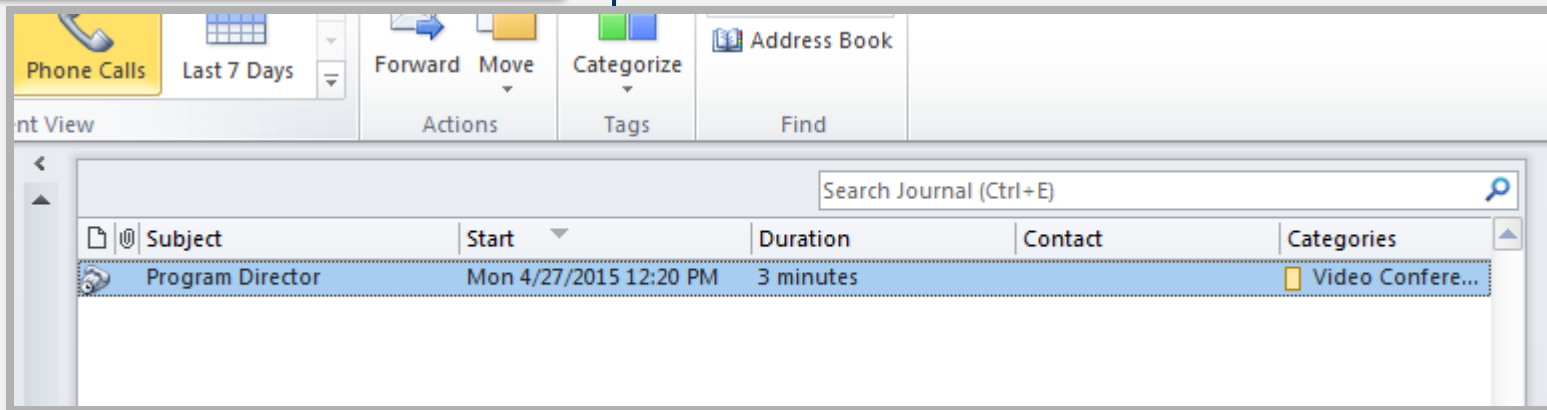
When you're done with the phone conference or other event...

## 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

The screenshot shows a task list application interface. At the top, there are columns for 'Task Subject', 'Created', and 'Categories'. Below the header, there is a link 'Click here to add a new Task'. The tasks are grouped by priority: 'Priority: Low (2 items)', 'Priority: Normal (2211 items)', and 'Priority: High (79 items)'. Each group is further categorized. For example, under 'Priority: High', there are categories like 'Categories: CBI (2 items)', 'Categories: FID (1 item)', 'Categories: FID Series (4 items)', 'Categories: LCME (3 items)', 'Categories: OMSE (1 item)', and 'Categories: Teaching Scholars Program (4 items)'. Each task entry includes a checkbox, the task subject, the creation date and time, and a small colored square representing the category.

Task Subject	Created	Categories
Click here to add a new Task		
Priority: Low (2 items)		
Categories: (none) (2 items)		
<input checked="" type="checkbox"/> Med/Ed eNews before I leave	Mon 5/19/2014 3:13 PM	
<input checked="" type="checkbox"/> SOS guide for excel basics and pivot table	Mon 5/19/2014 3:11 PM	
Priority: Normal (2211 items)		
Priority: High (79 items)		
Categories: (none) (64 items)		
Categories: CBI (2 items)		
<input checked="" type="checkbox"/> Revise I&I, DMH 1& 2, MSS Visio drawings	Wed 3/4/2015 9:31 AM	CBI
<input checked="" type="checkbox"/>	Tue 12/11/2012 5:05 PM	CBI
Categories: FID (1 item)		
<input checked="" type="checkbox"/>	Wed 3/4/2015 9:31 AM	FID
Categories: FID Series (4 items)		
<input checked="" type="checkbox"/> SEND out AHSC MEMO for AMES\OMSE seminar and workshop!!!!	Wed 2/20/2013 3:23 PM	FID-Series
<input checked="" type="checkbox"/> Create ebook of Teaching Scholars program with learning objectives for each Semin...	Fri 8/17/2012 10:36 AM	FID-Series
<input checked="" type="checkbox"/> AMES\OMSE FID e Newsletter August	Wed 8/8/2012 11:50 AM	FID-Series
<input checked="" type="checkbox"/> Live Webinar on: Measuring Resident Competence and Outcomes to improve patien...	Wed 7/18/2012 12:09 PM	FID-Series
Categories: LCME (3 items)		
<input checked="" type="checkbox"/> send enewsletter via mail chimp to listservs	Tue 12/18/2012 5:15 PM	LCME
<input checked="" type="checkbox"/> EDIT FA 05	Thu 12/6/2012 5:09 PM	LCME
<input checked="" type="checkbox"/> RECONCILE FA 04/FA 11	Thu 12/6/2012 5:08 PM	LCME
Categories: OMSE (1 item)		
<input checked="" type="checkbox"/> REMINDER: Chief Proctor Information for Web Based Examination Admin ID: A06967	Sun 5/20/2012 9:38 PM	OMSE
Categories: Teaching Scholars Program (4 items)		
<input checked="" type="checkbox"/> Set meeting with Rick Friedman - PE	Tue 3/5/2013 10:18 AM	Teaching Scholars Program
<input checked="" type="checkbox"/> SEND out AHSC MEMO for AMES\OMSE seminar and workshop!!!!	Wed 2/20/2013 3:23 PM	Teaching Scholars Program
<input checked="" type="checkbox"/> Create ebook of Teaching Scholars program with learning objectives for each Semin...	Fri 8/17/2012 10:36 AM	Teaching Scholars Program
<input checked="" type="checkbox"/> Teaching Scholars e Newsletter August	Wed 8/8/2012 11:50 AM	Teaching Scholars Program

# CONTACTS

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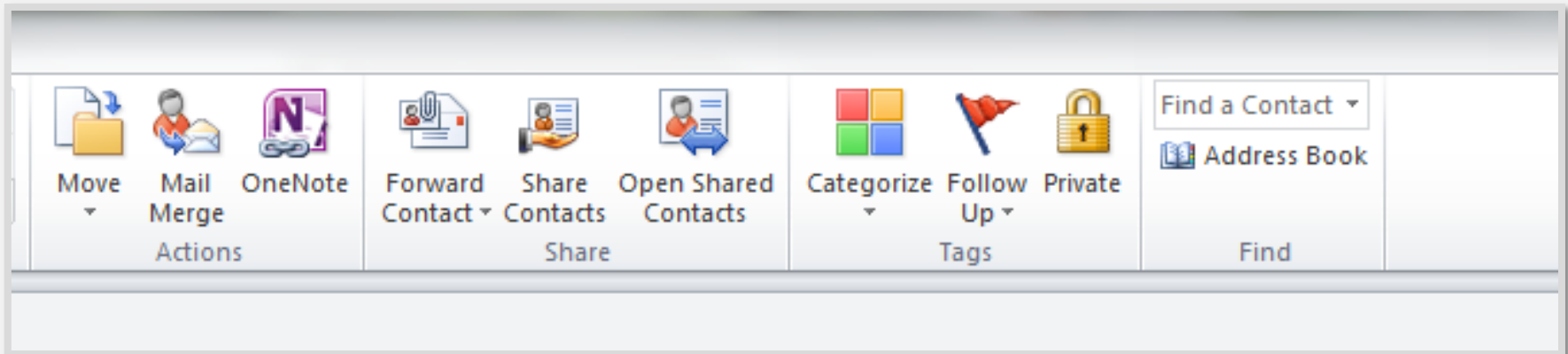
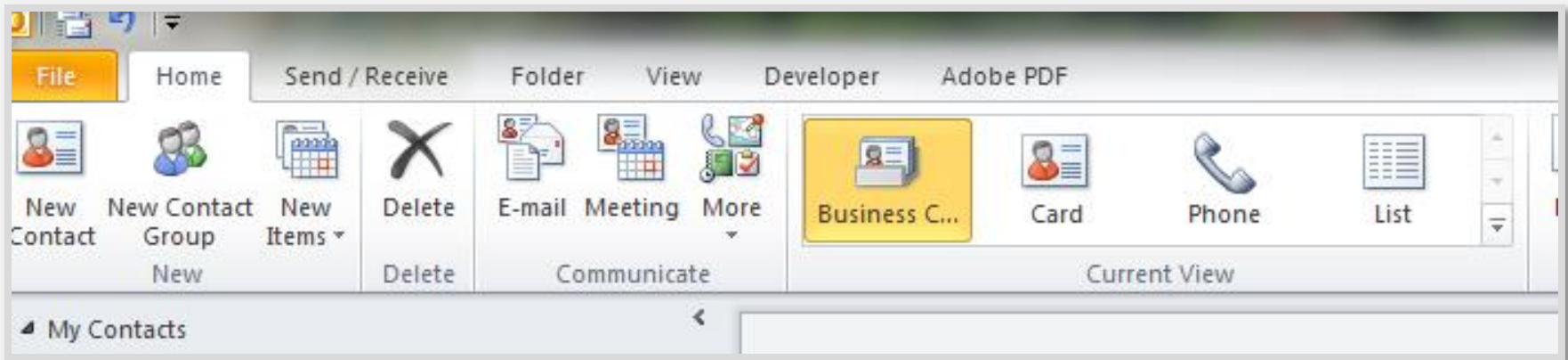
Create and manage contacts; Groups

# 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”.



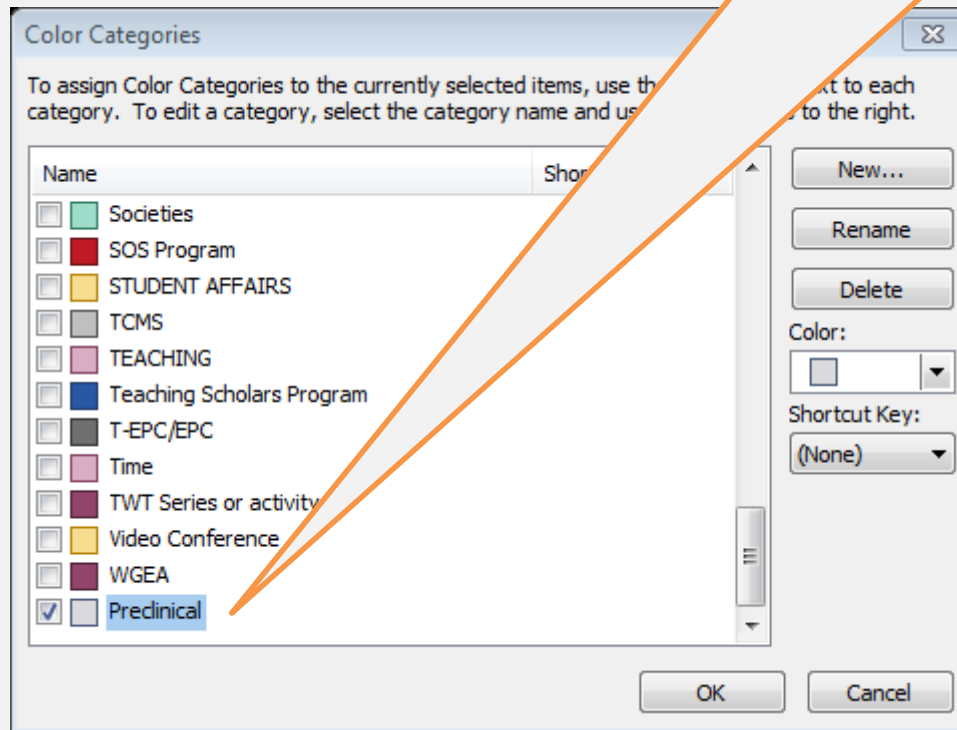
# Categorize Contacts

Click the  
Categories  
icon

The screenshot shows the Microsoft Outlook interface. The ribbon at the top includes the 'Categorize' button, which is highlighted by an orange callout box. The main window displays a contact card for 'AAMC West' with the name 'Legrouche, Oscar'. A red callout box points to this contact card with the text 'Select a Contact For example, "Oscar Legrouche"'. The left sidebar shows the 'Contacts' folder selected. The status bar at the bottom indicates 'Items: 483' and 'Connected to Microsoft Exchange'.


# Create new category for

Select or Create a Category

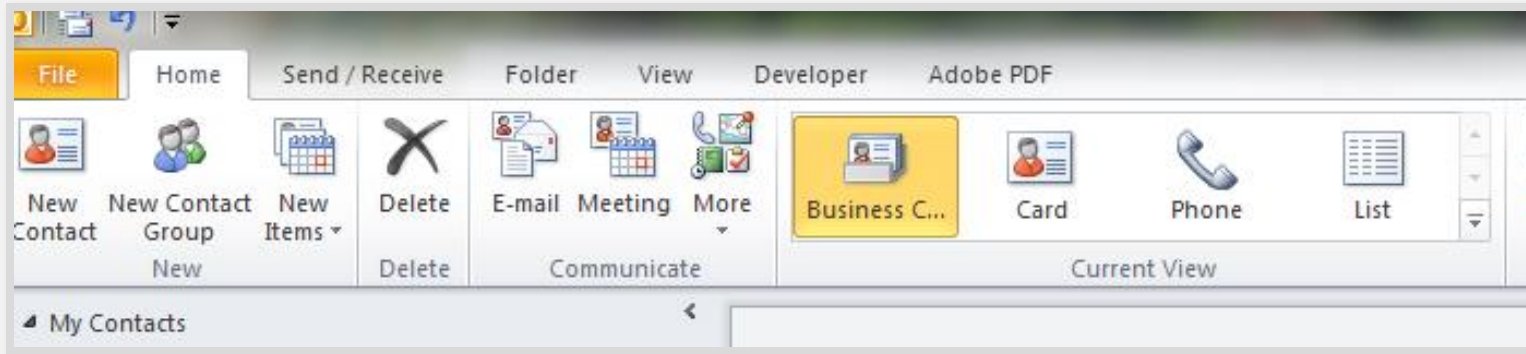


# Now The Contact Reflects The New Category

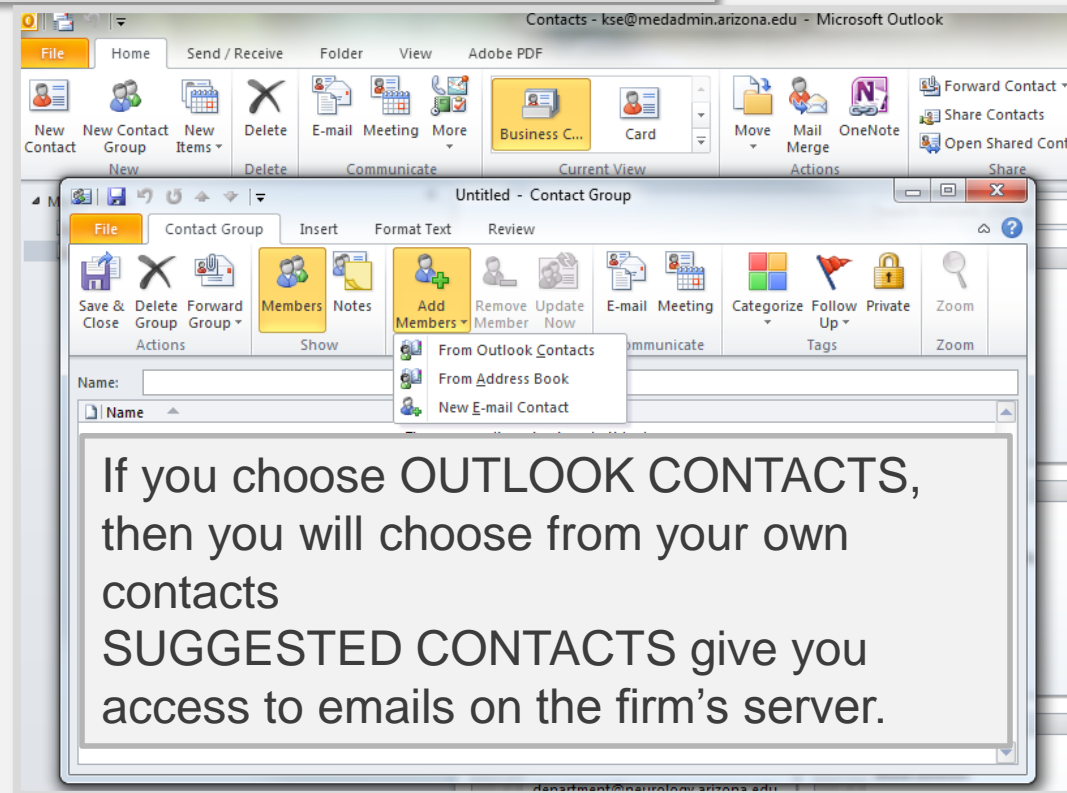
The screenshot shows a contact record in a CRM system. At the top, there are tabs for 'Close', 'New', 'Actions', 'Show', 'Communicate', and 'Name'. Below these is a category dropdown menu with 'Pre-clinical' selected and circled in blue. The contact details are as follows:

Full Name...	Oscar Legrouche	
Company:		
Job title:	Course Director	
File as:	Legrouche, Oscar	
<b>Internet</b>		
E-mail...	Oscarlegrouche@email.edu	<b>Notes</b> Committee Member
Display as:	Oscar Legrouche (Oscarlegrouche@email.edu)	
Web page address:		
IM address:		
<b>Phone numbers</b>		
Business...	(555) 555-5555	
Home		

# Create Contact Groups



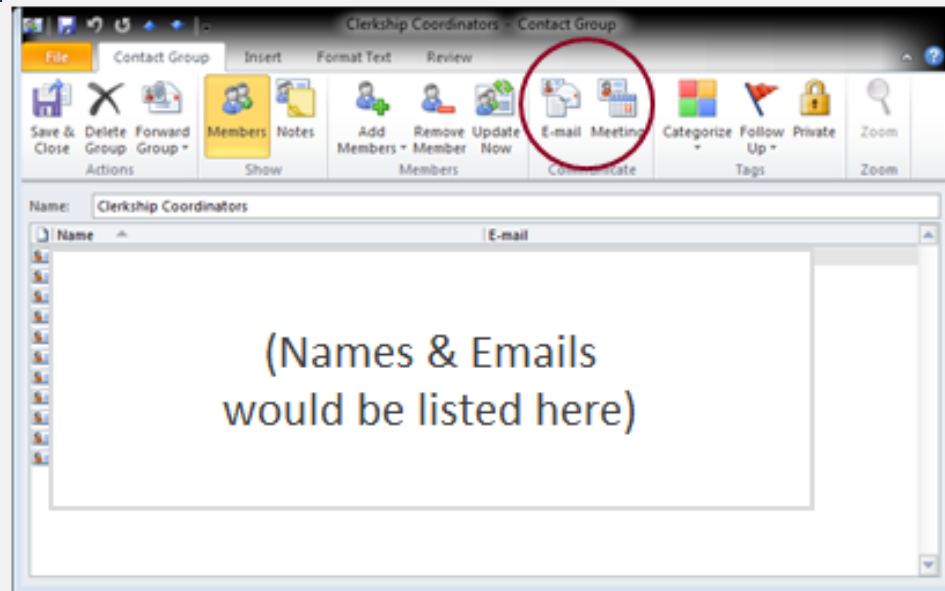
- ADD MEMBERS to a group of contacts from Outlook Contacts, Address Book or add new email contact.
- You may categorize your contact groups.





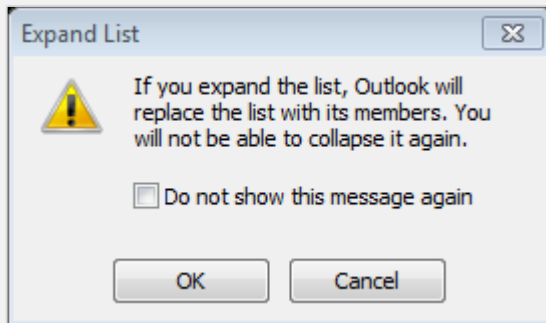
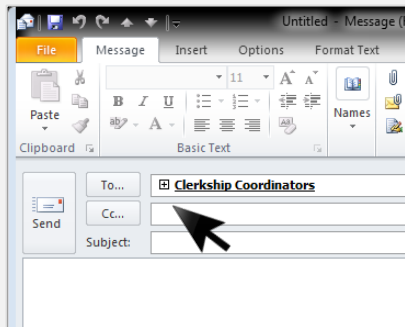
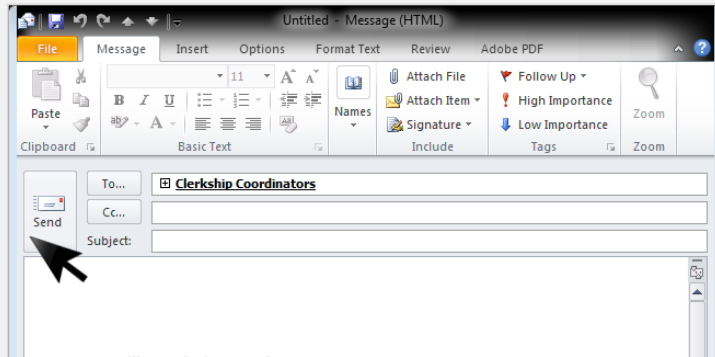
# How Contact Groups Work

- 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

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Outlook 2013


# Manage Multiple Accounts

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

The screenshot shows the 'Account' settings page in Outlook 2013. The page is divided into two main sections: 'User Information' and 'Product Information'. The 'User Information' section includes a profile picture of Venkatarangan Thirumalai, a 'Change photo' link, and links for 'About me', 'Sign out', and 'Switch Account'. Below this are dropdown menus for 'Office Background' (set to 'Calligraphy') and 'Office Theme' (set to 'White'). The 'Connected Services' section lists Facebook, LinkedIn, and Twitter, each with a 'Manage' link. At the bottom, there is a link for 'Venkatarangan Thirumalai's SkyDrive' and an 'Add a service' button. The 'Product Information' section on the right shows the 'Office' logo and 'Product Activated' status for 'Microsoft Office Professional Plus'. It also includes a link to 'About Outlook'.

## Account

### User Information

 Venkatarangan Thirumalai

[Change photo](#)

[About me](#)

[Sign out](#)

[Switch Account](#)





Office Background:

Calligraphy

Office Theme:


White

Connected Services:


-  Facebook [Manage](#)  
Venkatarangan Thirumalai
-  LinkedIn [Manage](#)  
Venkatarangan Thirumalai
-  Twitter [Manage](#)  
venkatarangan t.n.c.
-  Venkatarangan Thirumalai's SkyDrive  
@hotmail.com


[Add a service](#)

### Product Information



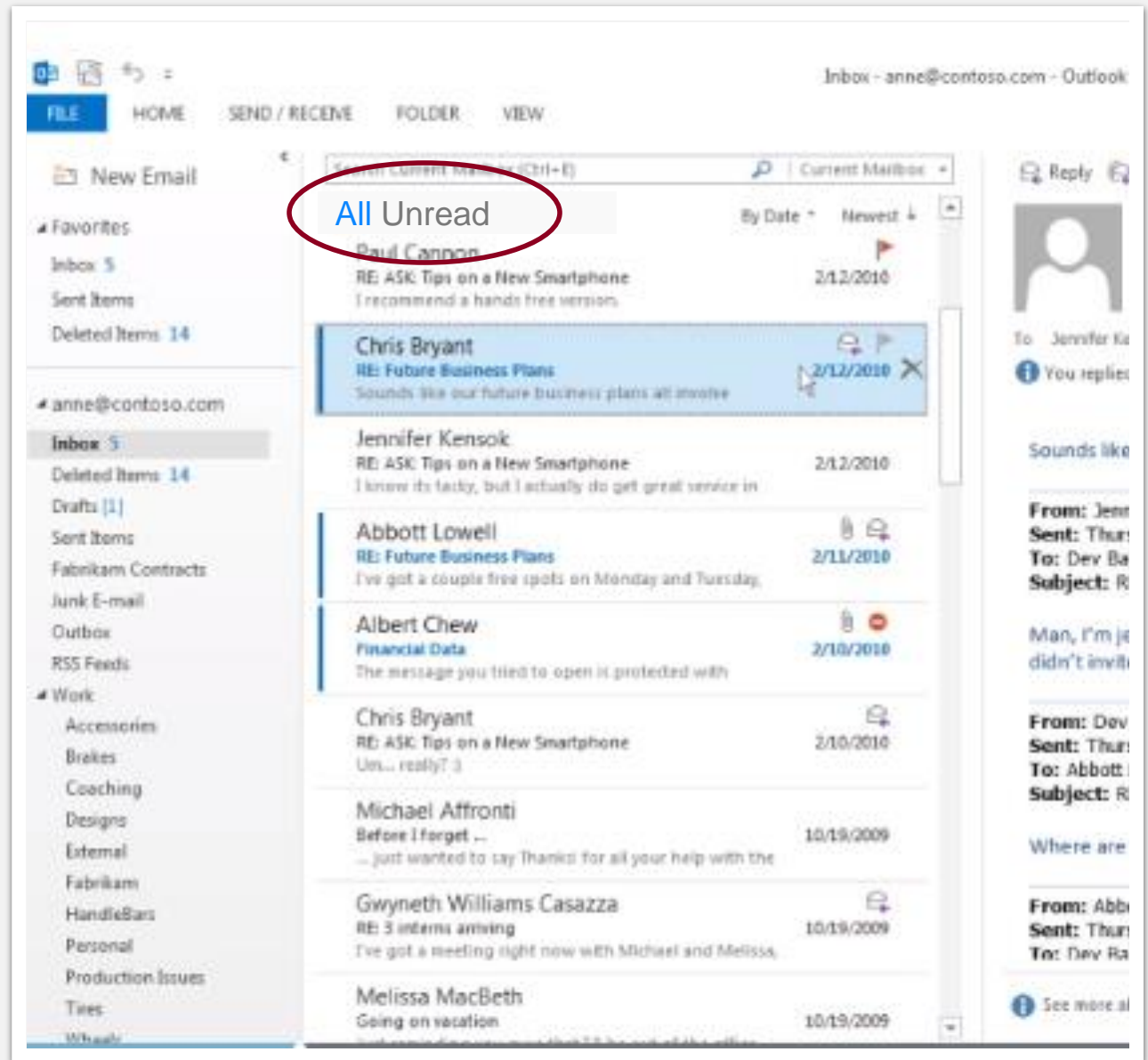
Product Activated  
Microsoft Office Professional Plus ;  
This product contains



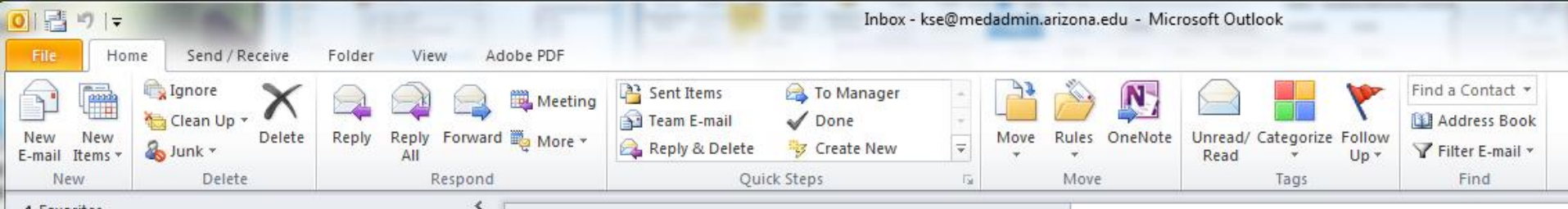
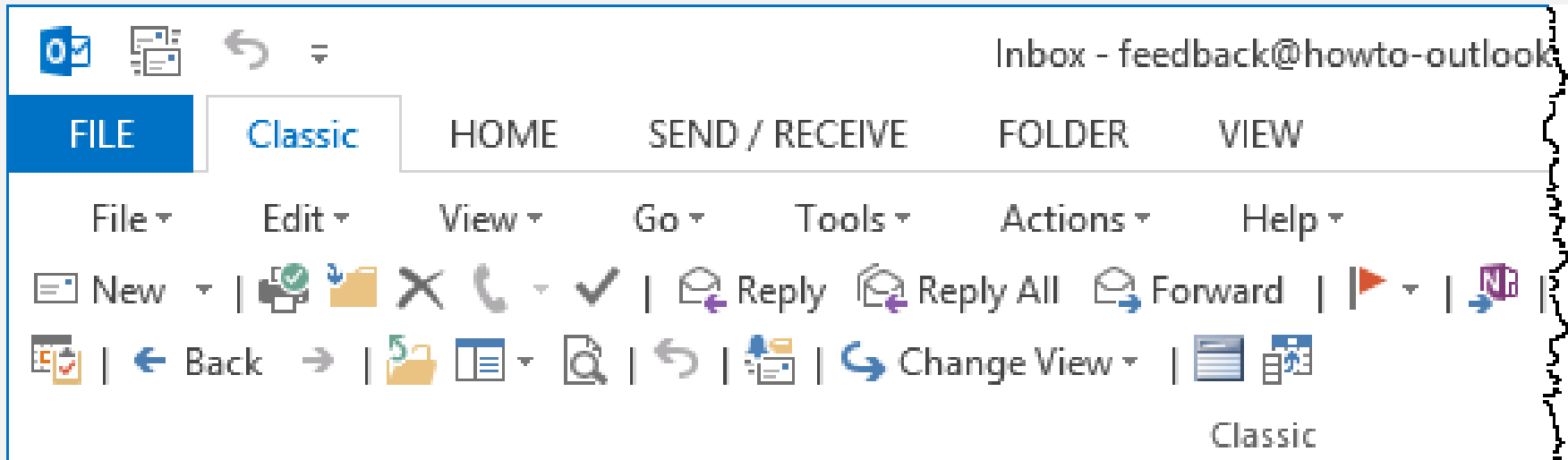
 [About Outlook](#)  
Learn more about Outlook

# Toggle Filter

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

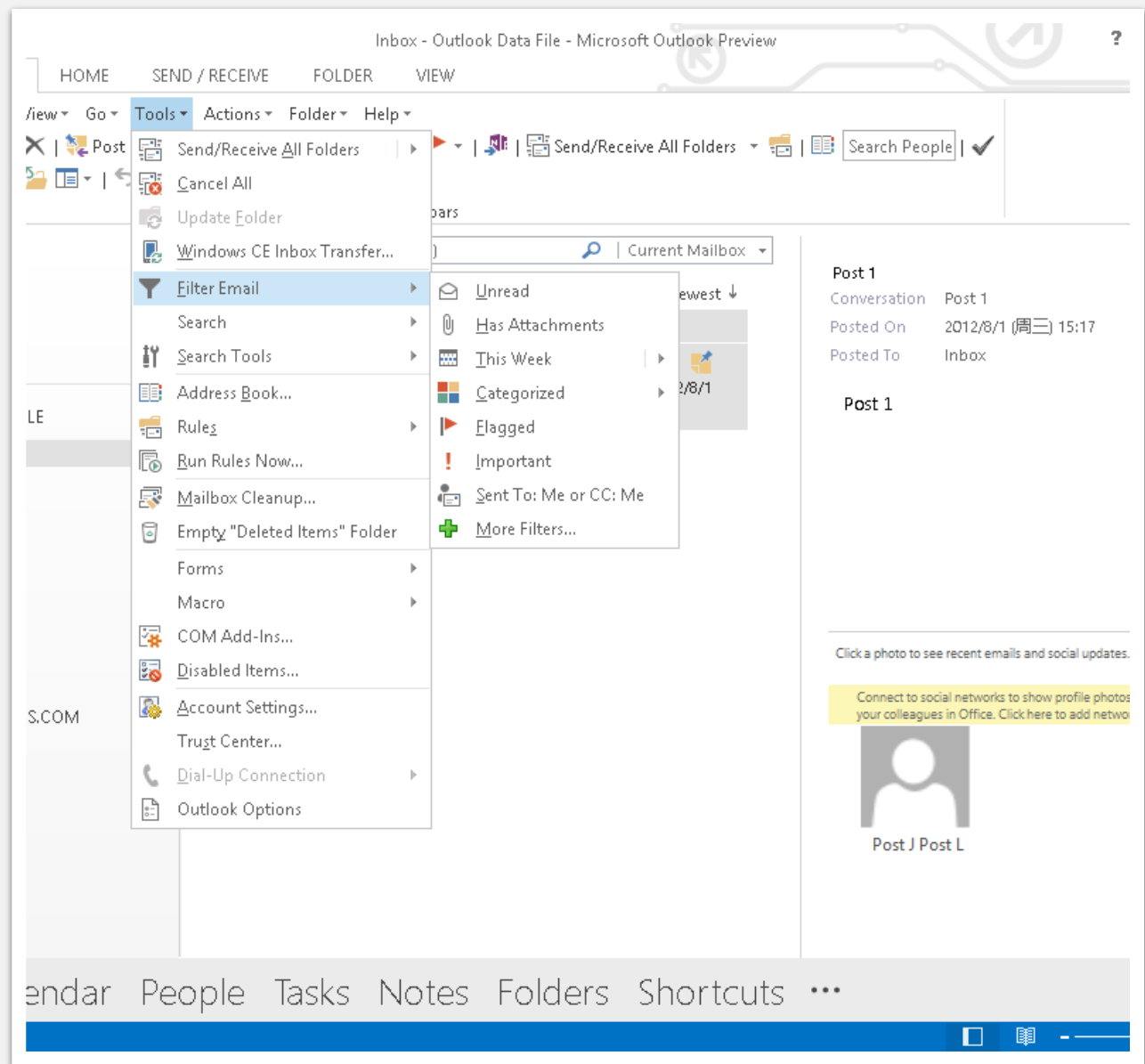


# Classic View has all of the 2010 tools



# 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.com

**FILE** **HOME** SEND / RECEIVE FOLDER **VIEW**

New Appointment Meeting Items ▾ New Lync Meeting Today Next 7 Days Day Work Week Week **Month** Schedule View Open Calendar ▾

Go To Arrange 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	<b>29</b>	30

◀ ▶ **November 2013** **New York, NY**

SUNDAY	MONDAY	TUESDAY	WEDNESDAY
Oct 27	28	29	30



THANK YOU!

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*Karen*