

# WORKING SMART WITH OUTLOOK

1 DAY

This course focuses on the users who are working with Outlook but could use tips and tricks to work smarter in Outlook.

## COURSE CONTENT

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### SETTING UP OUTLOOK

#### Views

- Creating a view
- Resetting a view
- Adding Columns to a view
- Opening the Advanced View Settings Dialog
- Managing Views
- Applying a View to Other Folders

#### Managing Folders

- Creating Folders
- Renaming Folders
- Moving Folders
- Deleting Folders
- Moving Messages to Folders

#### Using Rules and Cleanup Tools

- Creating a simple rule
- Modifying Rules
- Using the Rules and Alerts Wizard
- Marking a Message for Follow-Up
- Cleaning up a Folder or Conversation

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### INCREASE FOCUS AND PRODUCTIVITY

#### Using the Outlook Panes

- Using Outlook Today, the Navigation Pane
- Using the Reading Pane & the To-Do Bar

#### Changing Message Options

- Setting Message Priority
- Marking a Message for Follow Up
- Using Quick Click Flags
- Showing and Hiding Fields



- Working with Multiple E-Mail Accounts
- Requesting Delivery and Read Receipts

#### Setting Advanced Message Options

- Adding Voting Options
- Changing the Reply-To Address
- Delaying Delivery
- Saving Messages as Draft

#### Configuring Categories

- Setting up Categories
- Assigning a Category to an Item
- About Quick Click
- Upgrading Categories
- Using Categories in a View
- Creating Category Search Folders

#### Using Quick Steps

- Using Quick Steps
- Creating Quick Steps
- Managing Quick Steps
- Resetting Quick Steps

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## **APPLY STRATEGIES TO EFFECTIVELY MANAGE EMAIL**

### Tame Your Inbox with the Four Ds

- Delete it
- Do It: The 2-minute drill
- Delegate it
- Defer it
- How to defer a message: Flag it
- Just file it

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## **STAY ON TOP OF EVERY SINGLE FOLLOW-UP TASK**

### Daily Review: Managing Your Time and Tasks

- Saying No
- Calendar Management
- Ways to create tasks
- Ways to manage tasks
- Use your calendar: Create appointments for managing your time
  - Let INSIGHTS organize your time efficiently for you
- Set Aside Time

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## PRIORITIZE YOUR EMAIL TIME WITH "IMPORTANT" VS "URGENT" Tasks:

### Doing Your Work

- Weekly review
- Where to do your work
- Bulk process your tasks

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## FIND EMAILS AND INFORMATION QUICKLY AND EFFECTIVELY

### How to Find a Message from a Person

- Creating Default Search Folders
- Creating Custom Search Folders
- Using Search Folders
- Modifying Search Folders
- Using the Search Box
- About the Search Tools Tab
- Setting Search Options
- Searching for Contacts
- Filtering Emails

### Great Email Message Practices

- Basic rules of great messages: The do's
- Follow up: Flagging on send
- Basic rules of great messages: The don'ts
- How to redirect people
- How to be removed from a Contact Group
- When to use BCC

### Contacts

- Opening the Contacts Folder
- Understanding the Home Tab
- Creating a New Contact
- Editing Contacts
- Using the Contacts Navigation Pane
- Customizing Contacts Views
- Advanced Contact Management Options
- Showing Additional Fields
- Marking a Contact as Private
- Using the Communicate Group
- Changing the Contact Options

### Calendar and Meetings

- Opening the Calendar
- Understanding the Home Tab
- Understanding the Calendar Tools Tab
- Creating and Editing Appointments
- Using the Daily Task List
- Using the Calendar Navigation Pane
- Customizing Calendar Views
- Managing Your Calendar
- Sharing a Calendar
- Responding to a Calendar Sharing Request
- Viewing Another User's Calendar
- Using Schedule View
- Scheduling a Meeting
- Using the Scheduling Assistant
- Responding to a Meeting Request
- Tracking Responses
- Adding and Removing Attendees
- Contacting Attendees
- Cancelling a Meeting
- Creating a New Contact Group

### Eliminate Interruptions and create a constant focus on priorities

- Know your schedule and structure your day
- Be Firm, Friendly and Make Eye Contact with Visitors
- Reference What You're Already Doing
- Keep Up on Your Communication