Microsoft Outlook
Favorite Tips

Presented by Joanne Swensrude

Know it Sooner
Computer Training

COPYRIGHT

Copyright ©2013 by ***EZ-REF Courseware,*** Ladera Ranch, CA http://www.ezref.com/ All rights reserved. This publication, including the student manual, instructor's guide and exercise files, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic or mechanical, without prior written permission of *EZ-REF Courseware.*

©2014 Know it Sooner Computer Training

TRADEMARKS

EZ-REF is a trademark of *EZ-REF Courseware.* All other products or brand names mentioned are trademarks or registered trademarks of their respective holders.

DISCLAIMER

While *EZ-REF Courseware* has taken care to ensure the accuracy and quality of these materials, all material is provided without any warranty whatsoever, including, but not limited to, the implied warranties of merchantability or fitness for a particular purpose. Any persons or businesses mentioned in the text of this manual are strictly fictitious. Any resemblances to existing or deceased persons, or existing or defunct businesses, is entirely coincidental.

TABLE OF CONTENTS

1. Sorting Messages _______ 1

2. Searching _______ 1

3. Managing your Inbox _______ 1

3.1 Do it! _______ 2

3.2 Delegate It! _______ 3

3.3 Date It! _______ 3

3.4 Delete It! _______ 4

4. Automating Steps _______ 4

4.1 Quick Steps _______ 4

5. Conversation view _______ 6

6. Dragging Items to Folders _______ 6

7. Send It Again! (Sending the same message to the same recipients again) _______ 7

8. Find Related Items _______ 7

9. Adding Email Addresses to Contacts _______ 7

10. The Check Names Feature (CTRL K) _______ 8

11. Shortcut Keys _______ 9

1. Sorting Messages

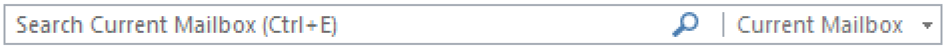
To quickly sort the messages by any one of the columns, simply click on the desired column heading and the messages will be sorted in that order. A small triangle is displayed in the currently sorted column. By default, the “From” and “Subject” columns are sorted in ascending sequence (A-Z) while the “Received” column is sorted in descending order.

There may be times when working with Outlook that you will need to reverse the order of the sort. You can quickly switch the sort order by clicking the column heading a second time.

If you sort by a text field such as FROM or SUBJECT, then you will be able to just start typing what you’re looking for and it will take you to that place in your list of emails. For examples, if you were looking for all emails from “JOANNE”, then sort by FROM and then just start typing JOANNE and you will see that it will take you to the first email from JOANNE.

2. Searching

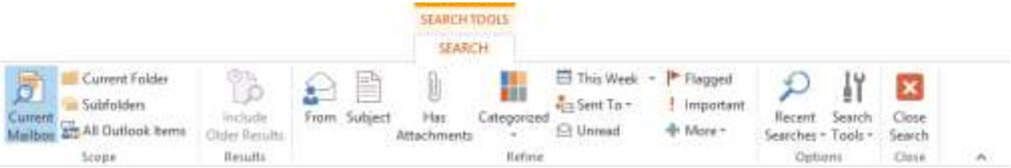
To locate a message stored within Outlook, use the Search feature as shown below:


Search Current Mailbox (Ctrl+E)
Current Mailbox

(a) Click in the box shown above (located above the columns headers of the Inbox).

(b) Enter the keyword(s) you are searching for. As you begin typing, Outlook will immediately start searching for messages based on what you are typing.

Notice a new ribbon appears for more advanced search requests:


SEARCH TOOLS
SEARCH
Current Mailbox
Current Folder
Subfolders
All Outlook Items
Scope
Include Older Results
Results
From
Subject
Has Attachments
Categorized
This Week
Sent To
Unread
Flagged
Important
More
Refine
Recent Searches
Search Tools
Options
Close Search
Close

If you want to perform a more detailed search, use this ribbon to fine tune what you want to look for.

3. Managing your Inbox

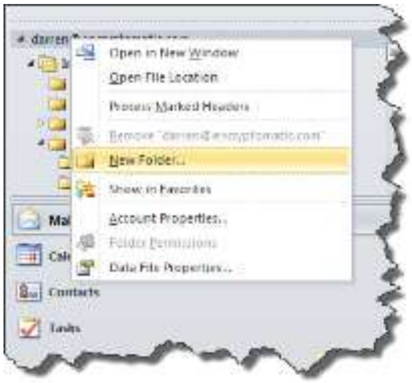
If you would like to keep your Inbox clean, we suggest to do at least one of the 4 D’s with every email.

Do it!
Delegate it!
Date it!
Delete it!

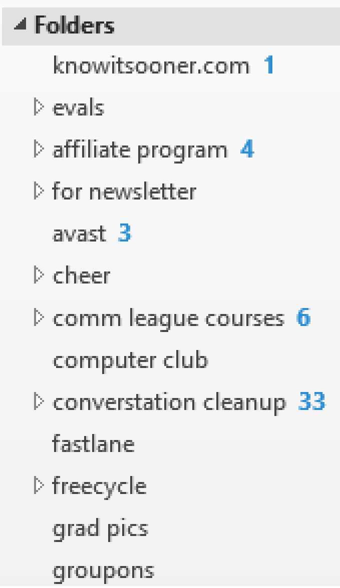
3.1 Do it!

If you deal with your email immediately, then delete it or file it in a folder for easy reference later. You may need to create a folder.

3.1.1 Creating a Folder

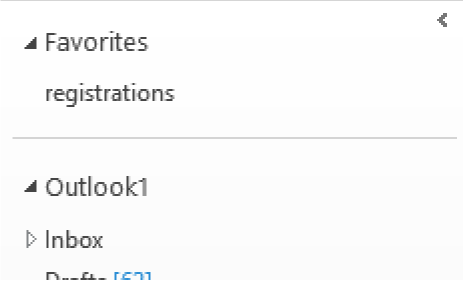

Open in New Window
Open File Location
Process Marked Headers
Remove "darren@..."
New Folder...
Show in Favorites
Account Properties...
Folder Permissions
Data File Properties...
Mail
Calendar
Contacts
Tasks

Simply Right click on the left hand side of the mailbox where you want your folder to appear. It is suggested to create a main folder first, then create subfolders inside.


Folders
knowitsooner.com 1
evals
affiliate program 4
for newsletter
avast 3
cheer
comm league courses 6
computer club
converstation cleanup 33
fastlane
freecycle
grad pics
groupons

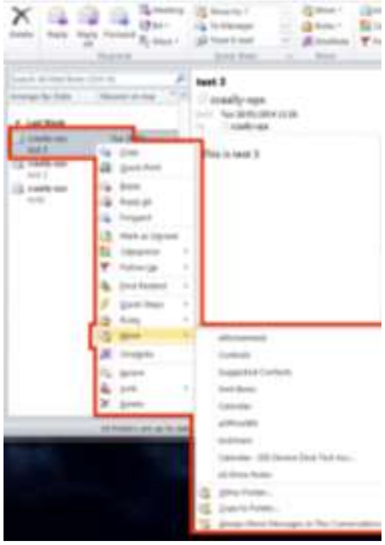
3.1.2 Add to Favorites

If you would like quick access to it, right click on it and you can add it to your favorites so it will appear at the top of your mailbox.


Favorites
registrations
Outlook1
Inbox

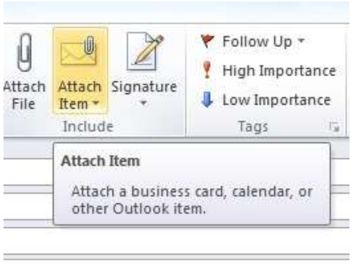
3.1.3 Move it to a Folder without Dragging it

You can see a list of your most recent folders by clicking on the Move button. This button is available from the main ribbon as well as by Right clicking on the message. You can access all your folders or create a new folder by choosing Other Folder.



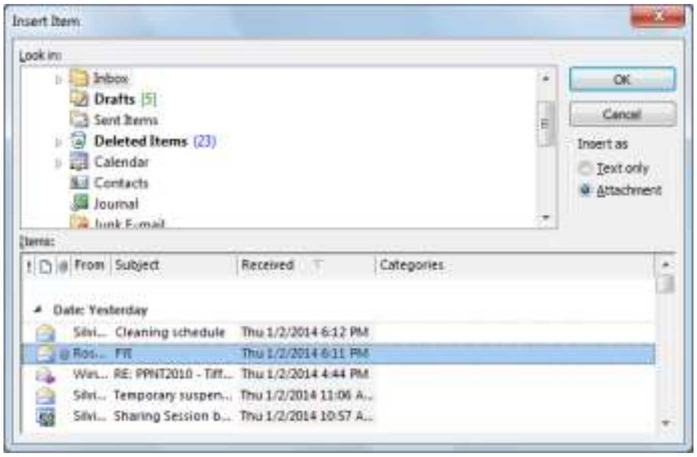
3.2 *Delegate It!*

If you forward an email to someone, you can simply just hit the Forward button and it prompts you to enter the recipient's name. If you have several items to forward, look for the Attach Item button and you will be able to include several emails. Use the CTRL key to select more than one.


Attach File
Attach Item
Signature
Include
Follow Up
High Importance
Low Importance
Tags

Attach Item

Attach a business card, calendar, or other Outlook item.

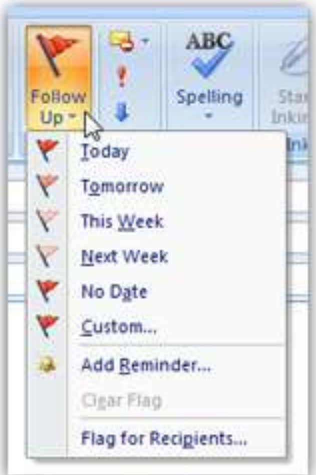

Insert Item
Look in:
Inbox
Drafts [5]
Sent Items
Deleted Items (23)
Calendar
Contacts
Journal
Junk E-mail
OK
Cancel
Insert as
○ Text only
● Attachment
Items:

From	Subject	Received	Categories
Date: Yesterday			
Silvi...	Cleaning schedule	Thu 1/2/2014 6:12 PM	
Ros...	FR	Thu 1/2/2014 6:11 PM	
Win...	RE: PPNT2010 - Tiff...	Thu 1/2/2014 4:44 PM	
Silvi...	Temporary suspen...	Thu 1/2/2014 11:06 A...	
Silvi...	Sharing Session b...	Thu 1/2/2014 10:57 A...	

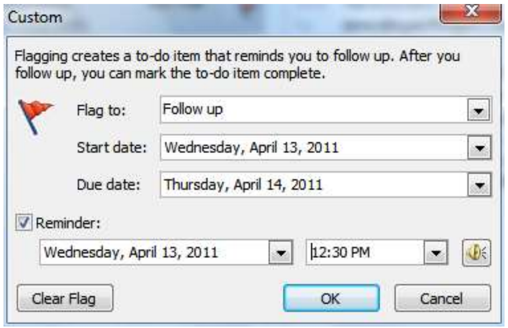
3.3 *Date It!*

If you want to flag a message for follow-up within a specific number of days, Outlook provides several predefined flags from which to choose. For example, you can add an instruction to call, reply or follow up on the message you are sending or receiving.

(a) Click on the Follow Up tool (located within the **Tags** section on the **Message** ribbon) to set a flag for the current message. A pull-down list of options will be provided:


Follow Up
ABC
Spelling
Today
Tomorrow
This Week
Next Week
No Date
Custom...
Add Reminder...
Clear Flag
Flag for Recipients...

If you select **Custom** OR **Add Reminder** you will be taken to a dialog box where you can then choose what type of follow-up you are creating (call, forward, read, reply, etc.). This will show up with your tasks and if you set a reminder, it will come up with a reminder box at that time if you have Outlook open.

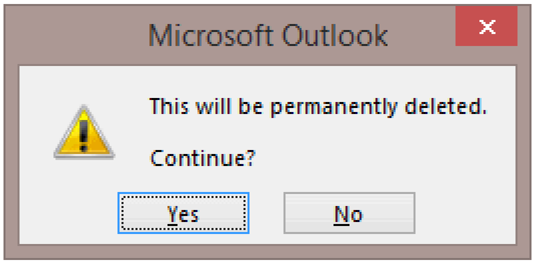

Custom

Flagging creates a to-do item that reminds you to follow up. After you follow up, you can mark the to-do item complete.

Flag to: Follow up
Start date: Wednesday, April 13, 2011
Due date: Thursday, April 14, 2011
☑ Reminder:
Wednesday, April 13, 2011 12:30 PM

Clear Flag
OK
Cancel

3.4 Delete It!


Microsoft Outlook
Yes
No

This will be permanently deleted.

Continue?

The traditional way to delete it to use the Delete key or click on the Delete button on the Ribbon. This puts it into the Deleted Items in case you need to retrieve it later.

If you know for sure you will not need to retrieve it, you can use the **SHIFT DELETE** key combination to completely bypass the Deleted Items folder. This saves time storage and time later deleting it. You will be asked to confirm your action but you will NOT be able to retrieve it later so have caution using the feature.

4. Automating Steps

Do you always want to move a message from a specific person or subject line to a folder? Create a quick step or a rule.

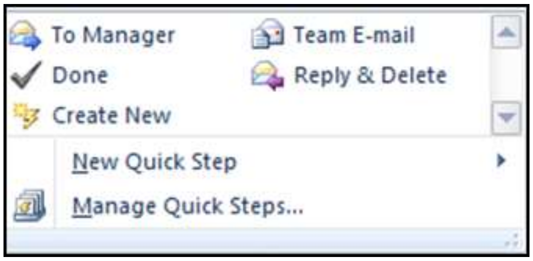
4.1 Quick Steps

Quick steps is a new feature to 2010 to enable you to do regular things more easily within your mail folders. We will look at how to use them and create your own quick steps to make your use of Outlook quicker and easier. Quicksteps are like small macros (stored procedures) and only need a click to activate that procedure.

A number of quick steps have already been built into outlook some you may use straight away and some you will have to edit.

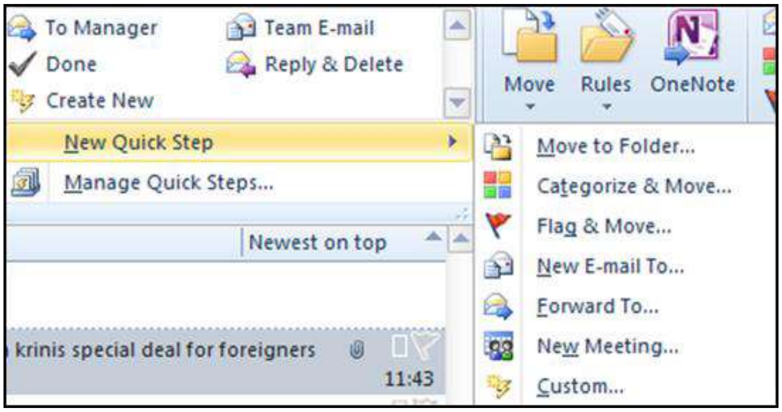
4.1.1 To use a quickstep

(a) Click on a quickstep to run task.


To Manager
Team E-mail
Done
Reply & Delete
Create New
New Quick Step
Manage Quick Steps...

4.1.2 To create a quick step

Creating a quickstep needs you to think of time consuming things that you wish done easily.


To Manager
Team E-mail
Done
Reply & Delete
Create New
Move
Rules
OneNote
New Quick Step
Manage Quick Steps...
Move to Folder...
Categorize & Move...
Flag & Move...
New E-mail To...
Forward To...
New Meeting...
Custom...
Newest on top
krinis special deal for foreigners
11:43

(a) On the **HOME** ribbon in the **QUICK STEPS** group click on the down arrow to the right of the box to display all quick steps and further options
(b) Click on CREATE NEW QUICK step

From the side bar that opens up decide what you would care to do (we will create a new email to someone (or group)
(c) Select **NEW EMAIL TO…** a dialog opens
(d) Enter a name for the Quick step

(e) In the **TO** box use the to button to select names from the address books

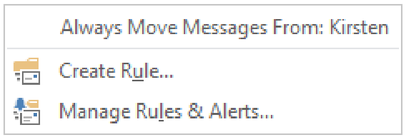
(f) Click **FINISH** to create the Quick Step
The Quick Step will appear in the Quick Step menu
Click on it to run.

4.1.3 Creating a Rule

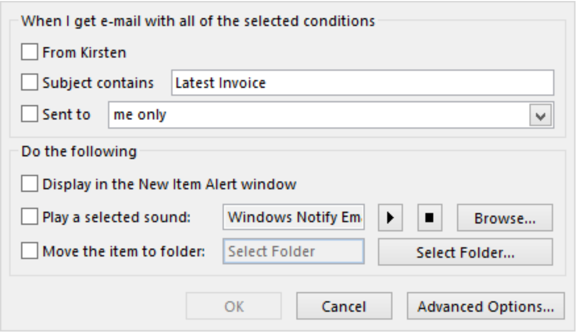
To quickly create a rule that automatically moves a message based on who it is from or who it is being sent to, follow the steps outlined below. You can also use the Subject line to determine where it should be filed.

(a) Click on the Rules tool from the Home ribbon or from the main Outlook window within the message window.

(b) Choose “Always Move Messages From” if you always want to move messages from a certain person. If you want to specify a specific subect line or specify other criteria, choose Create Rule…



The following dialog box will be displayed:


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

☐ From Kirsten
☐ Subject contains: Latest Invoice
☐ Sent to: me only

Do the following

☐ Display in the New Item Alert window
☐ Play a selected sound: Windows Notify Em
☐ Move the item to folder: Select Folder

This dialog box is divided into two sections.

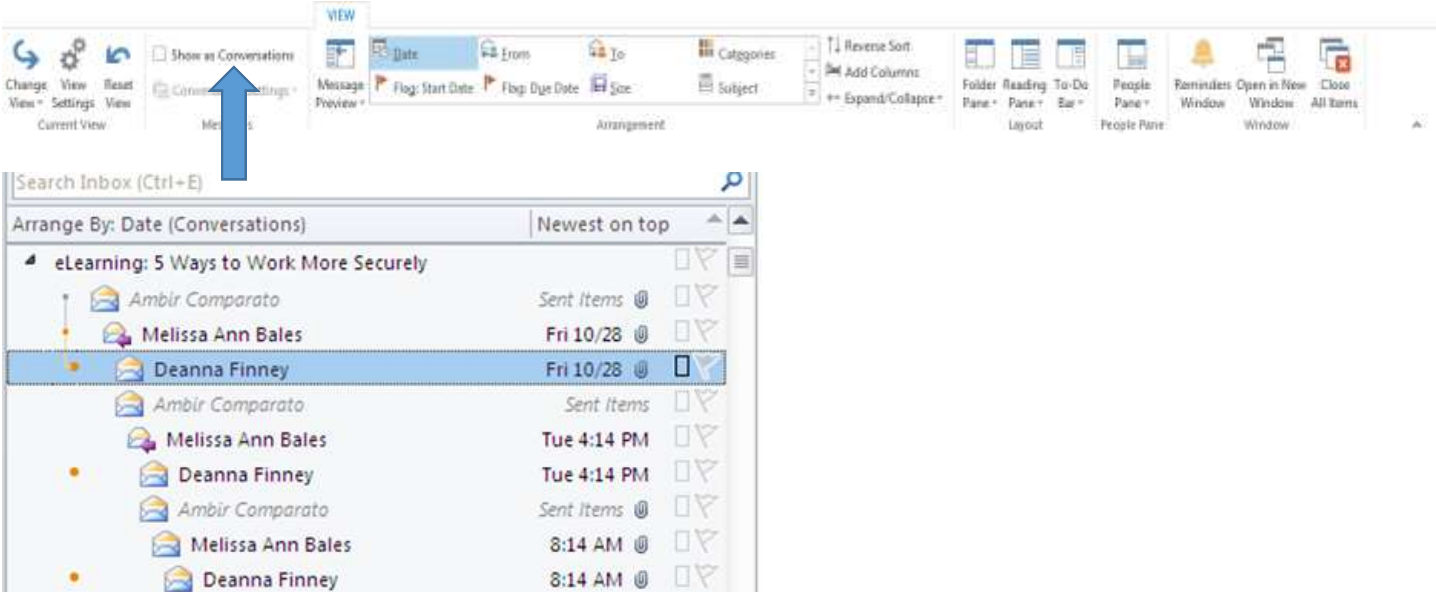
The top portion allows you to specify exactly which messages should be affected by the rule while the lower portion allows you to specify what action should be taken.

(c) Check the appropriate boxes.

(d) When done, click .

5. Conversation view

You may move your emails into different folders as you read and respond to them within your mail folders. A new feature of 2010 is conversations and it allows you to keep a track of any ongoing conversations (Replies and replies to replies etc.) irrespective of where you place them a track is kept of where they were moved to. To turn this feature on tick the SHOW AS CONVERSATIONS box in the CONVERSATIONS group of the View Ribbon tab.


VIEW
Change View
View Settings
Reset View
Current View
Show as Conversations
Message Preview
Date
From
To
Categories
Flag: Start Date
Flag: Due Date
Size
Subject
Reverse Sort
Add Columns
Expand/Collapse
Arrangement
Folder Pane
Reading Pane
To-Do Bar
Layout
People Pane
Reminders Window
Open in New Window
Close All Items
Window
Search Inbox (Ctrl+E)

Arrange By: Date (Conversations)	Newest on top
eLearning: 5 Ways to Work More Securely	
Ambir Comparato	Sent Items
Melissa Ann Bales	Fri 10/28
Deanna Finney	Fri 10/28
Ambir Comparato	Sent Items
Melissa Ann Bales	Tue 4:14 PM
Deanna Finney	Tue 4:14 PM
Ambir Comparato	Sent Items
Melissa Ann Bales	8:14 AM
Deanna Finney	8:14 AM

6. Dragging Items to Folders

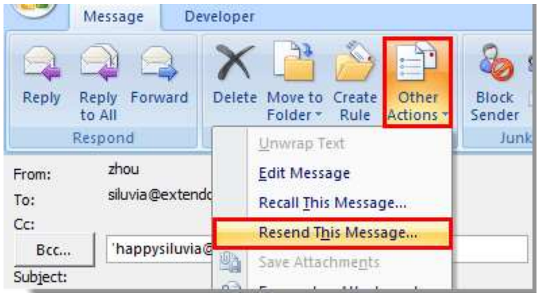
In addition to dragging an email to a folder you've created (File, New Folder), you are able to create different types of Outlook items by dragging the email message to a different kind of folder. In most cases, this copies the email into the destination folder so you still have the email to reply to or file or delete.

If you drag an email to:	**You will:**
Calendar	Create an Appointment
Tasks	Create a Task
Notes	Create a Note
Contacts	Create a Contact for the Sender and the Email contents goes into the notes section
Deleted Items	Delete the Email

7. Send It Again! (Sending the same message to the same recipients again)

Sometimes you want to resend a message to the same person or even a different person or maybe you forgot to attach a file.

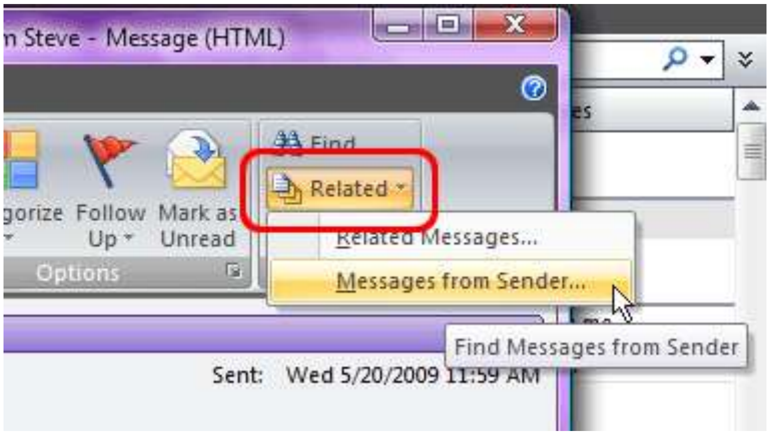
(a) Find the message in your Sent Items folder.
(b) Open the message.
(c) Click the Actions menu.
(d) Click Resend this message... A new message is created and can be altered before sending.


Message
Developer
Reply
Reply to All
Forward
Delete
Move to Folder
Create Rule
Other Actions
Block Sender
Respond
Junk
Unwrap Text
Edit Message
Recall This Message...
Resend This Message...
Save Attachments

From: zhou
To: siluvia@extendc
Cc:
Bcc... 'happysiluvia@
Subject:

8. Find Related Items

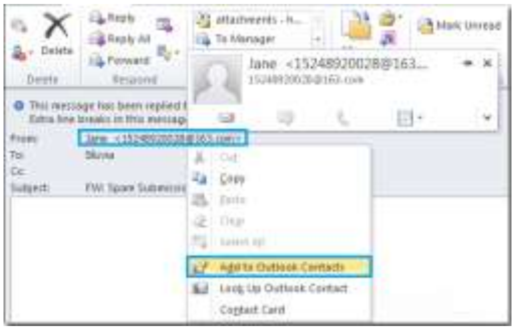
If you are in an email and you'd like to see other emails either in this conversation (with the same subject line) or from the sender, then you can click on the Related button. It will list all the emails that you asked to see.


n Steve - Message (HTML)
Find
Related
gorize
Follow Up
Mark as Unread
Options
Related Messages...
Messages from Sender...
Find Messages from Sender

Sent: Wed 5/20/2009 11:59 AM

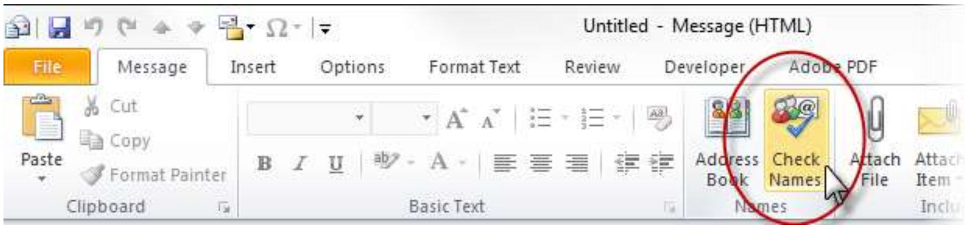
9. Adding Email Addresses to Contacts

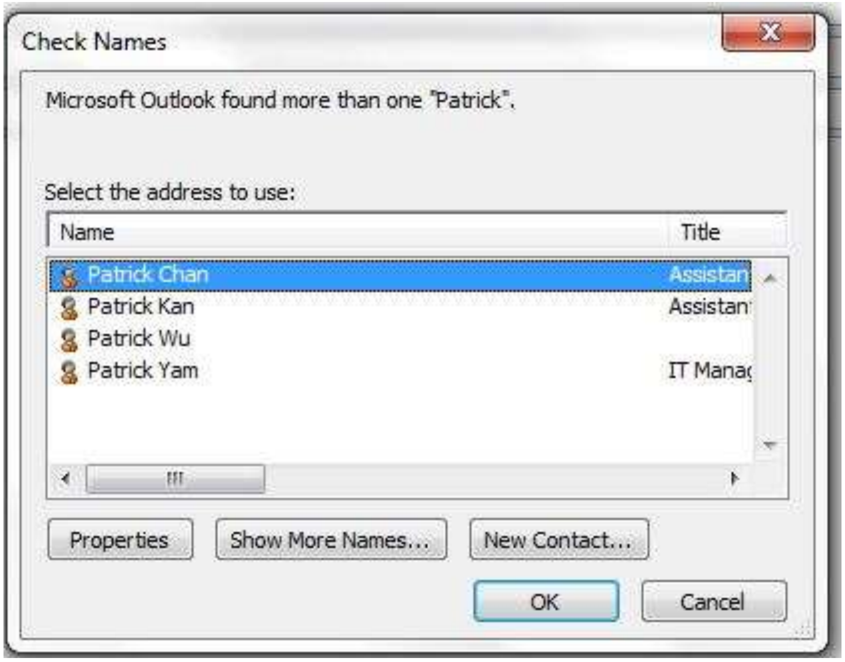
On an incoming or outgoing email, right click on the person's email address and choose Add to Outlook Contacts. This creates a new contact record and allows you to enter additional information if desired.


Delete
Reply
Reply All
Forward
Respond
To Manager
Mark Unread
Jane <15248920028@163...
Cut
Copy
Paste
Clear
Select All
Add to Outlook Contacts
Look Up Outlook Contact
Contact Card

10. The Check Names Feature (CTRL K)

You DO NOT need to enter the full address or name of the recipient of your email message if they are in the global address book or your contacts if you are not on Exchange Server. Simply type part of their name and press Ctrl-K or click the Check Names button on the toolbar to list any matches. If there is more than one match, it will list them, otherwise it will add the contact you specify to the address field you are on.


Untitled - Message (HTML)
File
Message
Insert
Options
Format Text
Review
Developer
Adobe PDF
Paste
Cut
Copy
Format Painter
Clipboard
B
I
U
Basic Text
Address Book
Check Names
Names
Attach File
Attach Item
Inclu


Check Names

Microsoft Outlook found more than one "Patrick".

Select the address to use:

Name	Title
Patrick Chan	Assistan
Patrick Kan	Assistan
Patrick Wu	
Patrick Yam	IT Manag

Properties
Show More Names...
New Contact...
OK
Cancel

11. Shortcut Keys

Press	To
Ctrl+Shift+I	Switch to Inbox from another Outlook folder
Alt+Enter	Display message properties
Ctrl+A	Mark All
Ctrl+Shift-B	Open Address Book
Ctrl+C	Copy selected text
Ctrl+D or Delete	Delete selected message
Ctrl+E	Opens Search Dialog
Ctrl+F	Forward to selected message
Ctrl+Shift+F	Open Message Search Dialog
Ctrl+N	Create new item (depends what folder you're in)
Ctrl+P	Print selected messages
Ctrl+R	Reply to the author of selected message
Ctrl+Shift+R	Reply to author and all recipients of selected message.
Ctrl+U	Marks Message as Unread
Ctrl+<	Display previous message
Ctrl+>	Display next message
Esc	Close window

Press	To create this item
Ctrl+Shift+A	Appointment
Ctrl+Shift+C	Contact
Ctrl+Shift+E	Folder
Ctrl+Shift+L	Distribution list
Ctrl+Shift+M	Message
Ctrl+Shift+Q	Meeting request
Ctrl+Shift+N	Note
Ctrl+Shift+K	Task
Ctrl+Shift+S	Post in this folder