Microsoft Outlook 2010

Getting the Most Out of Your Email System
University of Virginia Health System
Learning & Organizational Development

Overview of Inbox.......................................................... 3
Program Fundamentals...................................................... 3
Modify column headings.................................................... 5
Arrange or group for quicker searches................................. 6
Flag your email so it can be reminded to work with it at a later date.................................................... 6
Personal Folders.................................................................. 7
Saving an attachment to the F or O drive................................ 8
Saving an email and it’s attachment to the F or O drive.......................... 9
Attaching a document to an email.............................................. 10
Features in the “Options” toolbar icon..................................... 10
Recall an email.................................................................. 11
Drag and drop SPAM to a Helpdesk filtering system...................... 11
Overview of the Calendar .................................................... 12
Scheduling an Appointment or Meeting................................... 12
Change a Meeting Time........................................................ 13
Cancel a Meeting Time.......................................................... 13
View Other People’s Calendars or Meeting Room Calendars............. 14
Using the Task Feature.......................................................... 14
Deleting and Snoozing Tasks.................................................. 15
Contacts Lists.................................................................. 15
Preexisting Contact and Distribution Lists................................. 16
Out of Office Assistant......................................................... 17
Creating an Auto Signature.................................................... 17
Go Paperless!.................................................................. 19

Health System Computing Services Help Desk:  924-5334
Overview of Inbox

The Outlook 2010 program screen may seem confusing and overwhelming at first. This lesson will help you become familiar with it.

Quick Access Toolbar: Contains common commands such as Send/Receive and Undo. You can add and remove commands as desired.

Inbox: Lists all of your e-mail messages and can be arranged according to your specifications.

Instant Search: Enter key words to search the current folder or location. Displays results in real-time results appear as you enter each search term.

Title bar: Displays the name of the program you are currently using (Outlook) and the item you are currently working with.

Reading Pane: Displays the contents of the selected message.

Close button: Click here to exit the Outlook program.

Help button: Click here to open the Outlook Help window.

Ribbon: The tabs on the Ribbon replace the menus and toolbars found in previous versions of Outlook.

To-Do Bar: Keep tabs on your calendar, appointments, and tasks all in one place. The To-Do Bar can also be displayed in a minimized format.

Zoom Slider: Click and drag the slider to zoom in or out of an item or view. You can also use the + and – buttons.

People Pane: Displays information regarding the person(s) associated with the selected item.

Status bar: Displays information and reminders about Outlook items. Right-click the status bar to specify what information is shown.

Navigation Pane: Contains buttons and icons you can click to move among Outlook’s folders and tools.

File tab: Click here to access common commands (Open, Print, Save) as well as more advanced ones (Automatic Replies, Mailbox Cleanup, Rules and Alerts).
### Table 0-1: Outlook Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail Message</td>
<td>Compose a message to be sent by e-mail.</td>
</tr>
<tr>
<td>Appointment</td>
<td>Add an appointment to your calendar.</td>
</tr>
<tr>
<td>Meeting Request</td>
<td>Set up an appointment to which you invite other people or reserve resources such as a conference room.</td>
</tr>
<tr>
<td>Contact</td>
<td>Enter information about a person including their name, company, job title, and e-mail address.</td>
</tr>
<tr>
<td>Contact Group</td>
<td>Create a collection of contacts that allows you to quickly send mass e-mails.</td>
</tr>
<tr>
<td>Task</td>
<td>Enter to-do items that can be tracked until completion.</td>
</tr>
<tr>
<td>Task Request</td>
<td>Inform someone else of a task you would like them to perform.</td>
</tr>
<tr>
<td>Journal Entry</td>
<td>Keep track of interactions and files that you create—such as e-mails or Word documents—in a timeline view.</td>
</tr>
<tr>
<td>Note</td>
<td>Jot something quickly in a note. Can be sorted using color categories.</td>
</tr>
</tbody>
</table>
Modify column headings

Add a column

- To add a column, right-click on Column Headings bar and select “Field Chooser”.

Left click, drag and drop the field into the Column Heading bar. Add to the bar wherever information you would like to know about emails you have received. It is recommended that you keep the basic information of Importance, Attachments, Icons, From, Subject, Received, Size and Follow up Flag (if you use the flags).
Arrange or group for quicker searches

Arranging in groups gives you a different way to organize your emails.

Outlook will group according to the field you have selected in the sorting bar.

If “Received” was the last sort selected, emails would be grouped according to date.

Flag your email so it can be reminded to work with it at a later date.

To add a flag reminder, on the Home ribbon under tags (Follow Up) option or right click the flag on the right side of the inbox

- Choose a flag color (will not give a pop up reminder). Click the column header to sort all flagged emails and group them at the top of your inbox.

  OR

- Choose “Add Reminder” and complete the information in the pop up to select the date and time you want the email to automatically remind you to respond.
Personal Folders

Personal Folders sit in your Folder List but take space from your “F” drive, not Outlook. This saves space on your Outlook account so you get fewer “your inbox is full” messages. Mail messages can not be seen from the “F” drive and you can not see your Personal Folders if working in web mail or on a home computer. The first time, you have to go through several steps to create this Personal Folder; this is a one-time process – once you have created it, it will stay till you delete the folder. If you work on multiple computers, you will need to create your Personal Folder on each computer you use.

Make a Personal Folder:

Step 1: Click “File” then “Data File Management”.

Step 2: Select “Add” when the Outlook Data Files box appears.

Step 3: Select Office Outlook Personal Folders Files(.pst) and click OK.

Step 4: You will be asked to name your folder. It is recommended that you name it your sign on, i.e. st5t. Click OK and then click OK again. You will see the folder in your folder list.
Saving an attachment to the F or O drive

Make space in your email account by saving needed attachments to your F drive or an O drive folder. If you are saving emails because you need the attachment, you can save just the attachment to a drive.

Right click on the attached document.

The command box for saving will appear. Select either the F or O drive as your designated folder.

Rename the document.
Saving an email and its attachment to the F or O drive

Sometimes you will want the attachment as well as the information in the body of the email. You can save an email to a drive so that it retains email functionality when you open it on the F or O drive.

Click “File” on your email toolbar then select “Save As”. The next steps are very important in retaining the email functionality.

Do not click “Save”! The next steps are important for later retrieval of the file.

Once you have selected either the F or O drive and given the email an understandable File name, you must change the “Save as type” to “.msg”. It does not matter which.

In response to the Employee Engagement Action Team’s recommendation, the Center for Organizations Employee Assistance Program (EAP) are offering a series of personal financial management classes.

Get the latest on:
- How long to keep bills before shedding...
**Attaching a document to an email**

To attach a document, start a new email and click on the paperclip icon or “Insert” & click on the paperclip.
Locate the file you want to attach and click on it.

**Forwarding an attachment**

If you received an attachment and want to send it to anyone (even the person who sent it to you), you must the email. If you select “Reply” the email will go but the attachment will be lost.

**Features in the “Options” toolbar icon**

Start by opening a new email to find the Options Ribbon and click on Request a Delivery Receipt box or click on the little box on the right side Tracking.

- **Request a “read receipt” message to be sent to you.**
- **Schedule an email to go out when you are not on Outlook.**
- **Have replies go to a different person than the person sending the email.**
- **Use Select Names to open the Global Address List and locate the employee.**
Recall an email

You can pull an email back after it has been sent and if needed, correct information and resend quickly. If the receiver has already read the message, they will get a notice that you are trying to recall. If the message has not been read, it will be deleted from the recipients’ inbox without notice.

1. Start from “Sent Items”
2. Find and open the email you want to recall
3. Using the email’s toolbar, select “Actions”.
4. Select either “Recall This Message” then a Recall
5. This Message window pops up. Then make your selections.

Drag and drop SPAM to a Helpdesk filtering system

Opening or replying to SPAM can send cookies to the originator of the SPAM email. This signifies that they have found an authentic email address and can then sell the address to other SPAMers of PHISHERS, causing you to receive more SPAM. The Helpdesk provides a folder that lets you dispose of SPAM safely.

In your Folder List:

Go to Public Folders and click the + sign
Click the + sign next to All Public Folders
Drag the SPAM email to the “Report Spam” folder
Overview of the Calendar
You can view your calendar or meeting room calendar. You can view your coworker’s calendars as long as you have given each other permissions to do this. Contact the Helpdesk to set this up 4-5334.

Scheduling an Appointment or Meeting
Schedule a meeting with several people without having to check with them to see if they are available (only works if everyone uses their calendar to mark when they are busy).

Steps:
1. Double click in background area of calendar
2. Select the Scheduling tab
3. Select “Add Others” This is the Global Address List. Pick the people you want to invite to the meeting.
4. Click “AutoPick Next” The appointment time will jump to the next time everyone is free. You can also scroll to find desired times.
5. Select the Appointment tab

Go to next screen shot.
Change a Meeting Time
The simplest way to reschedule an appointment or meeting you have made is to left click on the border of the meeting and drag the meeting to the desired time. Another way is to double click the meeting to open it and then use the drop down dates and times to make the change.

Cancel a Meeting Time
The simplest way to cancel an appointment or meeting is to left click on the blue border and select the delete key or click the X in the toolbar.

If you change or delete a recurring meeting when others have been invited, you will receive the following questions:

With Appointment tab selected:
- Enter the subject of the meeting
- Enter the location
- Select the color label (if used)
- Enter any notes in the text box. This could be instructions, the meeting agenda, requests for items that need to be brought, etc.
- Click “Save and Close”
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View Other People’s Calendars or Meeting Room Calendars
Allows you to view co-worker’s busy times (will not see details of meeting just blocked time). Co-workers must first grant permission (call Helpdesk) for you to view their calendar. This also allows you to look at the availability of a meeting room before calling to reserve.

Once you have viewed a calendar, it will remain on your list of most recently viewed items for easy repeat access.

Using the Task Feature
The task feature gives you individual or repetitive personal reminders. Reminders will pop up on the date and time you select no matter what you are working on with your computer. Remember to word your task carefully if there will be a long span of time before receiving the reminder.

Double click to open a task.
Enter the “Subject” information.

If the task is repetitive, select “Recurrence” and fill in the type of recurrence you need.

It is not recommended that you assign tasks to others as the task can not be edited by the recipient.

Add a reminder if you are not going to check your task list on a daily basis.

Use the notes field if the task is complex.
Deleting and Snoozing Tasks
If you have set a reminder on your task, it will appear as in the example. You have several options to deal with the reminder:

1. Open it. Double click to open the task. Review the task or notes field.

2. Delete it. Open the task and click the “X” in the task tool bar. Selecting the Dismiss button does not delete the task from your task list, it just dismisses the reminder.

3. Snooze it. Choose the length of time you want to snooze the reminder (up to two weeks) and click “Snooze”.

Contacts Lists
Create a contact when the Global Address list does not have the information you need. Once in contacts, click “New Contact Group” from your toolbar. Fill in your preferences for information and then save. If you have an extensive list, use the search bar on the right side of the screen to jump to the first letter of your contact person.

Step 1:
- Type in a name for your Contact list.
- Add names from the Global Address List (GAL). Also add non-UVA names and email addresses.
Preexisting Contact and Distribution Lists

The Global Address List has preexisting distribution lists. Click on the address book or the “To” field in an email to see all distribution lists. Contact the Helpdesk for initial set up of either distribution list. You will need to designate a person to maintain lists as employees come and go.

Step 2:

- Open a new email
- Click the “To” field that opens the GAL.
- Use the drop down field and scroll to the very bottom to find “Contacts”. Some computers have this at the very top of the list.
- Your contact list will appear. Select your distribution list and click “To” at the bottom of the box. Click OK and complete your email.

The next time you wish to use the distribution list, simply type the name of the list into the “To” field of your email. The computer will remember and auto fill the list.

This list is departmentally based. Select a department and you will see all individuals on the list.

Type “CL” in the search field. This list can be of departments or work groups that crosscut departments. Right click a group and select “properties” to see who is in the list.
Out of Office Assistant

Use the Out-of-Office Assistant feature any time you will be out of the office for a half-day or more. An out-of-office message should say when you will return and who to contact if assistance is needed immediately. Example: “I will be out of the office until Monday, April 28. If you need assistance, please call the main department number at 924-2502.”

Click on File, then select the Info option.
Click on the Automatic Replies.

Creating an Auto Signature

Auto signatures include your contact information on every email. Everyone should create an auto signature. To make an auto signature, go to “Tools” in the toolbar. Select “Options” at the end of the list. In the options box, select “Mail Format”.

Select “New”.
Fill in the pertinent information seen to the left.
It is not recommended that you insert quotes or images within your auto signature.
You can change the font or color of your text:
- Highlight your text
- Click “Font”
- Select the style and color you desire
- Consider NOT using italicized fonts because they are difficult to read.
Click OK, Finish and OK again to save your changes.
Dealing With the “Mailbox Full” Message

When you receive the Helpdesk email that your mailbox is full, click on the link they provide or click on “Tools”, then “Mailbox Cleanup. This tool can tell you where the bulk of your emails are, in the Inbox, Sent Items, Deleted Item, or folders you have created. Use the search features you have learned about starting on page two to look for large sized emails such as emails with attachments as they will take up more space in your account.

- Clear your “Sent” folder regularly. It is suggested to keep 30 days of sent mail (sort by date). Anything over 30 days old should be deleted or moved to a folder off the email server.
- Clear your “Deleted Items” regularly as above or set your account to purge your deleted items every time you exit the Outlook program.
Email Etiquette

A. Respond to all emails within 24 hours, even if it’s just to say, “I’ll get back to you.”
B. If you are cc’d in an email you should not respond to the sender, only those directly emailed.
C. Avoid using wallpaper in your outgoing emails. What is enjoyable to you may be distracting or problematic to the recipient.
D. Don’t use “reply all” unless everyone needs to see your answer (Reply all - Ctrl key, Shift key and R key)
E. Consider personal quotes or inspirational messages for your personal email not the workplace.
F. Check your spelling, punctuation and grammar, better yet, use the editor found in File/Options
G. Be aware of your electronic tone - It is hard to interpret meaning with just words; emails can easily be taken the wrong way. Example - All Caps is equated with yelling.
H. Reread your emails before sending to ensure brevity, accuracy, and understandability.

Go Paperless!
Establish a fax account in your computer and bypass the machine. Store faxed documents electronically and share them easily. Call the Helpdesk and have them set this system up for your entire department. If you are using Shortcuts, you can have a shortcut to your fax account just as with any other folder.

Perks of a FAX Account

- Can fax documents to yourself that you want to store electronically
- Takes up less space than scanning
- Has no cost
- Is shared by department so all have access to the account.
- Easier to manage incoming faxes because you can email directly to the recipient.

More Go Paperless!

- Send an electronic document to someone’s fax machine without printing and feeding to your fax machine.
- Attach the document to an email (see page 7)
- You need to include the square bracket, a person’s name, and the fax number without dashes.

Email Etiquette