# Take your Inbox by the Horns: Being More Productive with Outlook

Although it is thought of as your "email software," Microsoft Outlook does much more than give you a way to read and answer email. Major tools included are Mail, Calendar, Tasks, Notes, and Contacts. This is just a few of the features that can help you to be more productive and organized. A link to a page with step-by-step instructions for most features can be found at the end of this handout.

## Tip 1: Organize

There are several ways to use Outlook to stay organized.

1. Organize your Outlook folders to match your paper and digital folders. This makes it easier to remember where you file things.
2. Naming folders is a completely personal preference, unless you are sharing files with other people. You should file according to how you would look for something. Use whatever naming system that works for you.
3. **Search folders:** Create custom search folders to help you pull mail based on specific criteria. Search folders do not actually hold your email messages. They hold search results. The beauty of Search Folders is that one email can actually be pulled up in several search folders. If you receive an email from Ima Boss that concerns Project XYZ and two co-workers, Willie Makit and Betty Wont, you do not have to stress about where to file it. You simply make a search folder for each of the projects and people, and the same email will appear in each of their search folders.
4. **Four Ds:**
   a. Do it: Read the email. If you can take care of it in two minutes or less, just do it.
   b. Delete it: If the email is something you will not need again, delete it.
   c. Delegate it: If the email is something that should be passed along to another person, do it now.
   d. Defer it: If the email is about something that will take some time, defer it until you can take care of it. Be sure to schedule time in your day to take care of deferred email.
5. **Categorize:** The Categories tool allows you to customize color codes. These are especially useful in the Calendar tool, but they are useful in Mail as well. You might use blue for meetings, green for committees, or red for important matters. You choose the color and the category name, then you assign the category as needed. See the Categories handout for more information and instructions on using and customizing the Categories tool.

## Tip 2: Automate

1. Create a signature line with your contact information.
2. Use Quick Parts for text blocks you use often.
3. Create rules for where automatically dealing with your mail.
4. Use filters to locate only email that fit particular criteria.

## Tip 3: Use the Calendar

Outlook's calendar tool has a ton of features to help you stay organized and to work more productively.

1. Share your calendars with those who need access to it. You can share some of the details or all of the details. You can even give permission for others to add or edit events.
2. Use the calendar to schedule meetings. Assuming those you are inviting use Calendar, you can quickly check for conflicts before you schedule a meeting.
3. Set up reminders for events or projects. Reminders can be set for as few as five minutes to two weeks before the event.
4. If you have meetings that occur on a regular basis, set them up as recurring.  Calendar has features that let you select everything from the first Friday of every month to the same date every year.
5. The Calendar tool allows you to create multiple calendars. You might want to create one for personal events, one for a committee, and/or one for a training calendar.
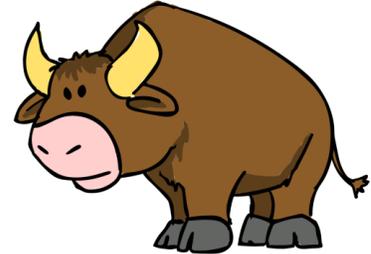
## Tip: 4 Save Steps

To save steps, spend time learning the shortcuts available. Many applications use the same shortcuts, thus multiplying the effectiveness of learning them.

1. A right-click produces different results, depending on where your cursor is located Right-click on an email message, and you are presented with a list of actions you can do to the message, such as reply, delete, flag, and categorize. Right-click on the Mail window and you get options for sorting, filtering, and arranging your messages.
2. Use the pane under the message. This panel will display information on people included in the message.  Clicking on a picture of one of the recipients or sender will provide you with links to previous Outlook interactions, such as emails, attachments exchanged, and meetings. This panel is sometimes closed or nearly closed. Just drag up on the separator bar at the bottom of your email to open the panel larger.
3. Learn the ribbons. Spend some time clicking through the ribbons at the top of Outlook (or any application, for that matter). You may find valuable tools to help you accomplish more with less.

## Instructions and Information on Tools Covered in this Session

- Jayne Pyle, director, Professional Development Institute
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- Link to Handouts for Individual Tools Mentioned:
  http://libguides.pulaskitech.edu/content.php?pid=699724
- Or http://tinyurl.com/jpyle
- Or use the QR code to the right to access the handouts.