Outlook 365 Time and Task Management

Rev 12/20

Everyone uses Outlook at TJX, but not everyone manages information in the same way. Are there ways to be more efficient and productive when using Outlook 365? The techniques, tips, and shortcuts in this handout may help save time, reduce tasks, and manage Outlook information more effectively.

Some guiding principles

- The Inbox is a temporary storage place to hold messages before you process them
- Don't put everything on your calendar
- Create tasks that are actionable
- Use folder features to organize information
- Use shortcuts to streamline activities

Most importantly: **Process**, then **Take Action**.

The goal is to make Outlook your "Personal Assistant" – helping you process and act on important information. Save time by setting up Outlook features that manage and organize items, then using techniques that leverage Outlook's strengths to streamline your activities.

An "Inbox-centric" view (Outlook 365, *from left to right*): the Compact Navigation in the lower-left corner (with Calendar Auto-Peek); Messages organized into groups; Reading Pane with its Action Buttons at the top; the To Do Bar with the Calendar and Tasks panes showing.

Outlook Mail

Shut off incoming mail "distractors"

Go to **File** tab > **Options** > **Mail** > **Message Arrival**, and shut off everything *except* Display a Desktop Alert.
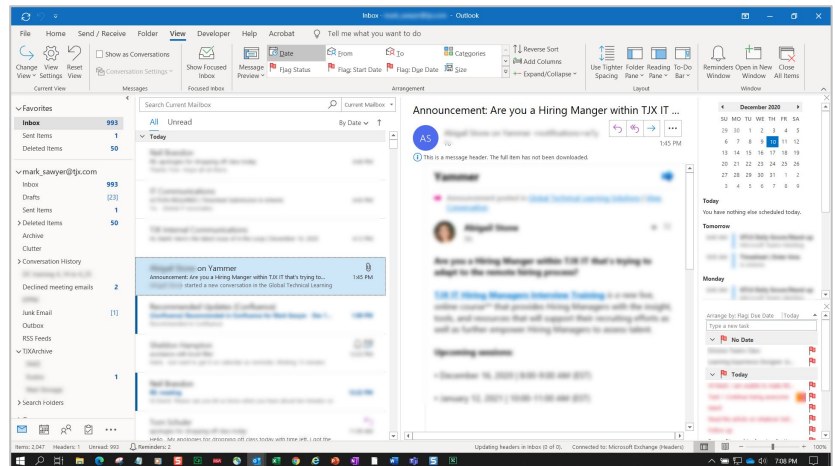
Reduce the number of Desktop Alerts you see

By default, a *Desktop Alert* pops up every time a new message arrives. To reduce them, shut off Display a Desktop Alert (**File** tab > **Options** > **Mail** > **Message Arrival**) and then create a unique *View Alert rule* for each specific person

Quickly work with items in the Messsages list by using keyboard shortcuts
(Messages List is in the default view)

Next/Previous Message	DOWN/UP Arrow
Open	ENTER
Close	ESC
Mark as read	CTRL + Q
Mark as unread	CTRL + U
Cycle Flag/Completed	INSERT
Reply	CTRL + R
Discard Reply	ESC
Delete message	DEL
Undo	CTRL + Z

Before you build rules…

Incoming and sent emails are checked against all the rules stored in the E-mail Rules list. *To prevent issues, familiarize yourself with the "Stop processing more rules" setting.*

Handling meeting requests

Create a rule that automatically sends meeting requests directly to the Inbox. This is helpful if you build rules that route messages from specific senders into other folders.

Handling meeting responses

Create a rule that automatically sends meeting responses *without* message text directly to the Deleted Items folder.

Create a new Item from Clipboard content

In your open application, copy the content you want. Then, go to the Inbox or Calendar and press **CTRL+V**. A new item is created with the pasted content shown in the text area.

Add inline comments when replying

Add inline comments to the original message to clarify your reply. Let the sender know you're using them by typing "note my comments below" at the start of your reply.

Working on an emailed request?

Send an email reply and **Follow up** with an **Add Reminder** for you *and the sender*. This lets the sender know you'll respond by a certain date, rather than think you forgot their request.

View messages expiring soon!

In the Inbox, click the search field above the Messages list. In the **Search** tab, **Refine** group, **More** menu, click **View Items Expiring Soon.** *(expires:<= the next month)*

Outlook 365 Time and Task Management

Outlook Calendar

Quickly look ahead/behind the current month
In the Date Navigator, use your mouse to click and hold on the Month Label, move to the desired month, then release.

Use natural language dates in an appointment
In the Appointment Form, click in the date field and type "next Tuesday", "two weeks from now", (etc.) – Outlook will automatically insert the correct date.

Compare two separate dates in one view
In the Date Navigator, click on one date, then **CTRL + click** on another. Both will appear in the window.

Quickly move or copy an appointment
To move the appointment, drag it to another date in the Date Navigator. To copy, hold down **CTRL** while dragging.

Send a meeting request to a non-attendee
Forward the meeting request. When you do, the organizer is notified, but the other attendees are not (the organizer would have to send a meeting update to notify them).

Send meeting information to a non-attendee (without adding them to the meeting request nor notifying the organizer)
Drag the meeting request from your Calendar to the Mail icon in the Navigation Bar. This opens an email with only key meeting information. Complete the email and click **Send**. *NOTE: this technique **does not** notify the organizer.*

Arrive at the meeting *before* the organizer?
In your Calendar, drag the top border of the meeting entry up. This doesn't impact the organizer's (or attendees) entries. *NOTE: If the organizer sends an update, it will change your modifications.*

Handle meeting cancellations from your Inbox
Clicking "**Remove from Calendar**" from the Inbox Reading Pane of a meeting cancellation email sent to you deletes both the calendar entry *and* the message.

Outlook Contacts

Use only one address book if possible
Typically, you should use only one address book (the TJX Global Address List). Only consider using a *Contact List* when you deal with people outside the Company (examples are vendors or suppliers) or when you want to store additional information about an Associate, like a birthday or nickname.

Use a Calendar Group for your Project Team
Constantly meeting with the same group of people? Use a *Calendar Group* to more easily see the team's (and your favorite rooms') free-busy information. The group appears in the Navigation Pane of the Calendar.

Outlook Tasks

Set a task on one or more emails
Select message(s), then press the **INSERT** key. The task flag appers in **RED**, with a Due Date of today (can be edited).

Make tasks actionable
A flagged Message becomes a Task, with the Task name taken from the Message subject. Rename it to the *next action* of the Task. (*Example*: the Message "Weekly reviews aren't complete" sent by Kim becomes the Task "Complete Kim's weekly reviews by Friday").

Show by Due Date? Or by Start Date?
If you set tasks to be completed before meetings, show by Due Date. If you defer tasks into next week, show by Start Date. (*To tame procrastination*, try using a Start Date.)

Sidenote: Have OneNote? Use it for meetings!
Take meeting notes in OneNote, and when you flag an item on the page it appears in Outlook as a new Task. (*Is the task already in Outlook?* Open the Task, then link the task to the notebook using **Task** tab > **Actions** group > **OneNote.**)

Outlook Item management

Use Conversations View for the Inbox
If a message with the same subject travels between many people, consider changing the Inbox view to **Conversations**.

Manage interrelated items with Categories
Assigning one (or more) color category to a message, appointment, task or other item lets you identify and group information. *Caveat*: there are only 25 available colors.

Everything in Outlook is searchable...
Outlook is, essentially, forms information whose common properties are searchable. Click in the search field of your folder, then use **Search** tab > **Refine** group to narrow down the results. Use **Recent Searches** to repeat a search.

Make Folder and Category names work for you
Choose meaningful names. For subfolders, typing a "1,2,3" prefix ahead of the name keeps it at the top of the list (example: 1-Reference, 2-Personal, 3-Management). For categories, consider an "@" prefix (example: @Meeting).

Speed up your Outlook work!
Right-clicking reduces commands to just the essentials. *Voila!*

> *A Final Thought*
> This handout concentrates on *Outlook* time and task management, not general time management techniques. Investing time to enhance your own communication, prioritization, planning, and self-management skills is always time well-spent towards increased productivity.