

Outlook 365 Desktop: Time and Task Management

Everyone gets the same Outlook application, but not everyone manages information in the same way. Are there ways to be more efficient and productive when using Outlook? 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. Time is saved by setting up Outlook features that manage and organize items, then using techniques that leverage Outlook's strengths to streamline your activities.

Outlook Mail

Process messages by using *Groups and Views, Folders, and Rules*, to only read the messages that are important to you.

Use Groups and Views to sort mail

By default, Inbox mail is displayed in *Compact View* and organized by *Date* into *Groups* (Today, Yesterday, etc.).

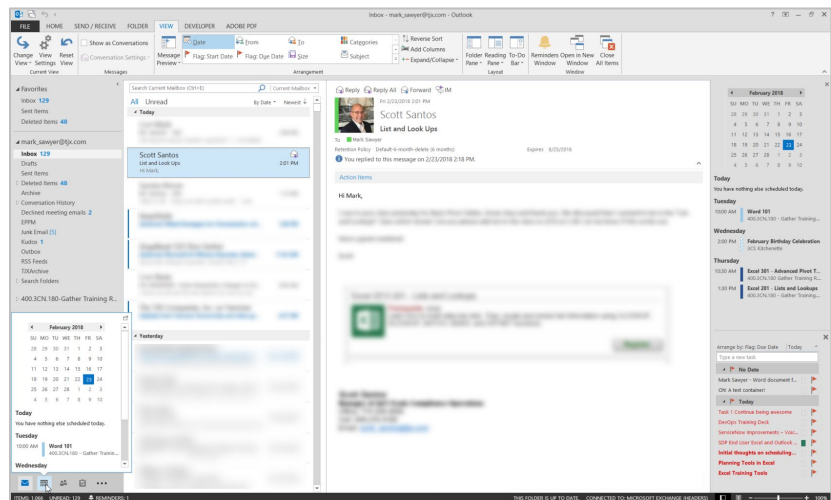
- *To change the grouping:* At the top of the **Messages List**, click **By Date**, then select a grouping from the menu. Popular groupings include From and Attachments.
- *To sort the groups:* At the top of the **Messages List**, click the menu command to the right of the “By” menu.
- *To collapse the groups:* right-click on the group title in the **Messages List** and choose **Collapse All Groups**.

Create Folders to organize mail

By default, the Inbox holds all mail. Subfolders can be created to store specific messages away from the Inbox.

- *To create a subfolder:* In the **Folder List**, right-click on the Inbox and select **New Folder**. In the text field that appears, type a folder name and then press **ENTER**.
- *To add emails to the subfolder:* In the **Inbox**, manually drag one or more messages over to the folder title and release. *Alternative:* create a Rule (see right).
- *Can't see the subfolder?* Click the triangle at the left of the >Inbox to expand the subfolders.

TIP: Some people keep all messages in the Inbox, then use categories and flags. Some use as few folders as needed, then create rules and route messages into them. The bottom line: messages important to you should be easily seen in your Inbox.



An “Inbox-centric” workflow (from left to right): the Compact Navigation with Calendar Auto-Peek above, Messages organized into groups, Reading Pane with Action Buttons at top, Calendar and Tasks panes in the To Do Bar.

Create and apply Rules to manage mail

A *rule* is a set of instructions that Outlook uses to route mail. Based on specific properties of the incoming message, Outlook can perform certain actions like route or delete messages.

- *To create a rule for one sender:* In the **Messages List**, right-click on the message. From the menu, select **Rules -> Create Rule**. In the **Create Rule** dialog, select the appropriate options. (For additional conditions and actions, click the **Advanced Options** button.)
- *To manage all rules:* In the **Home** tab, **Move** group, click **Rules**, then click **Manage Rules and Alerts**.
- *To create a new rule using the Rules Wizard:* In the **Home** tab, **Move** group, click **Rules**, then click **Manage Rules and Alerts**. In the **E-mail Rules** tab, click **New Rule**.

TIP: Outlook's Rule Wizard has some rules templates to choose from, or create a custom rule by clicking **Apply rule on messages I receive** in the “Start with a blank rule” section.

Some tips for organizing mail using subfolders

- Use the least number of subfolders possible.
- Create a distinct folder naming system.
- Consider creating a Rule for a subfolder so that Outlook automatically routes incoming mail to that subfolder.
- Keep the subfolders nested inside the Inbox.
- Consider using the **TJX Archive** folder - if available - for longer-term storage (up to two years). The Inbox holds a message for only six months.

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Create a rule to delay sending your messages

Delay sending your messages now, rather than trying to *Recall* them later (which is difficult and potentially embarrassing). Send the message immediately if marked High Importance.

1. In the **Home** tab, **Move** group, click **Rules**, then click **Manage Rules and Alerts**.
2. In the **E-mail Rules** tab, click **New Rule**.
3. Click **Apply rule on messages I send**.
4. Click **Next**. At the prompt, click **Yes**.
5. In the **Select action(s)** list, select **defer delivery by a number of minutes**.
6. In the **Edit the rule description**, click “a number of” link.
7. The default is 1 minute. Click **OK**, then click **Next**.
8. In the **Are there any exceptions?** select **except if it is marked as <importance>** Below, **Edit the rule description** to **High**.
9. Click **Next**, then specify a name for this rule.
10. Click **Finish**. At the prompt, click **OK**.
11. Use the *Rules and Alerts Manager* to edit the rule, turn it on or off. or delete it.

Use Conditional Formatting to identify your mail

A classic *Conditional Formatting* rule is to highlight all incoming mail sent only to you using the color **BLUE**.

1. If needed, on the **Navigation Bar** click **Mail**.
2. If needed, on the **View** tab, **Current View** group, under **Change View**, select **Compact**.
3. Click **View Settings**.
4. In the **Advanced View Settings: Compact** dialog, click **Conditional Formatting**.
5. Click **Add**. Type a Name for the rule.
6. Click **Font**. Under **Color**, click **Blue**. Click **OK**.
7. Click **Condition**. Select **Where I am:** the only person on the **To** line.
8. Click **OK** as needed to close all dialogs.

“Stop Processing More Rules”

When creating rules for incoming messages, note that Outlook applies every rule in your rules list to the incoming message. If it can run the rule, *it will* – sometimes producing undesired results. To avoid this, select **stop processing more rules** as your rule’s last condition. In this way only certain rules are applied to a specific message; once the rules stop Outlook ignores the rest of the rules in your rules list that could be applied to that specific message. *Learn more in Outlook Help.*

Outlook Contacts

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

Create a custom Search folder to find mail

Create a *Search Folder* to quickly find information filed in different email folders based on criteria you select.

1. If needed, on the **Navigation Bar** click **Mail**.
2. On the **Folder** tab, **New** group, click **New Search Folder**.
3. Select **Create a custom Search Folder**.
4. Under **Customize Search Folder**, click **Choose**.
5. In the field, type a name for your custom Search Folder.
6. Click **Criteria**, and then select the options that you want from the **Messages**, **More Choices**, or **Advanced** tabs.
7. Click **Browse** to select the folder(s) that you want to be searched.
8. Click **OK** as needed to close all dialogs.

Outlook Calendar

The more meetings there are, the less time you (and fellow attendees) have for other work. Call a meeting only when there’s been more than five emails exchanged, you need collaboration/brainstorming, or when it’s the only clear way to proceed on a project.

Organize related information using Categories

Categories allow you to tag Outlook information using colors. Group by categories to view related items for ease of action. Consider categorizing by projects, or topics, or locations.

1. If needed, on the **Navigation Bar** click **Mail**.
2. On the **Home** tab, **Tag** group, **Categorize** menu, click **All Categories...**
3. From the dialog, click **New** to create a new category.
4. Type a name for the category, then pick a color and optional shortcut key. (It’s common practice to use **RED** to denote **Urgent**.)
5. Click **OK** as needed to close all dialogs.

Outlook Tasks

A *task list* focuses you in on what needs to be done, since it takes you away from the Inbox (which can be a distraction). Remember that in the To-Do folder view, there are *two* locations: the **To-Do List** which shows only the upcoming tasks, and **Tasks** which shows all tasks completed or not.

- Create a meeting-related task, and set the Due Date for the day before the meeting.
- Consider organizing tasks by Start Date; not every task needs (or has) a Due Date.
- If your task impacts another’s task, do that task first.
- *To set a task on one or more emails:* select the email(s) and then press the **INSERT** key. The task is due today.