Email Organization

Microsoft Outlook 2010 Tips
December 2013

Imagination at work.

GE Transportation

Overview

1. Space
2. Rules
3. Inbox Zero

Space and Memory

What Is a .pst file?

- PST stands for Personal Storage Table
- Rather than maxing out your inbox. Save all of you Outlook items to a PST folder right on your computer.

What is taking up all my space?

- Too many emails with attachments generally consume an inbox's space
- Search Tab > Has Attachments > Arrange By: Size

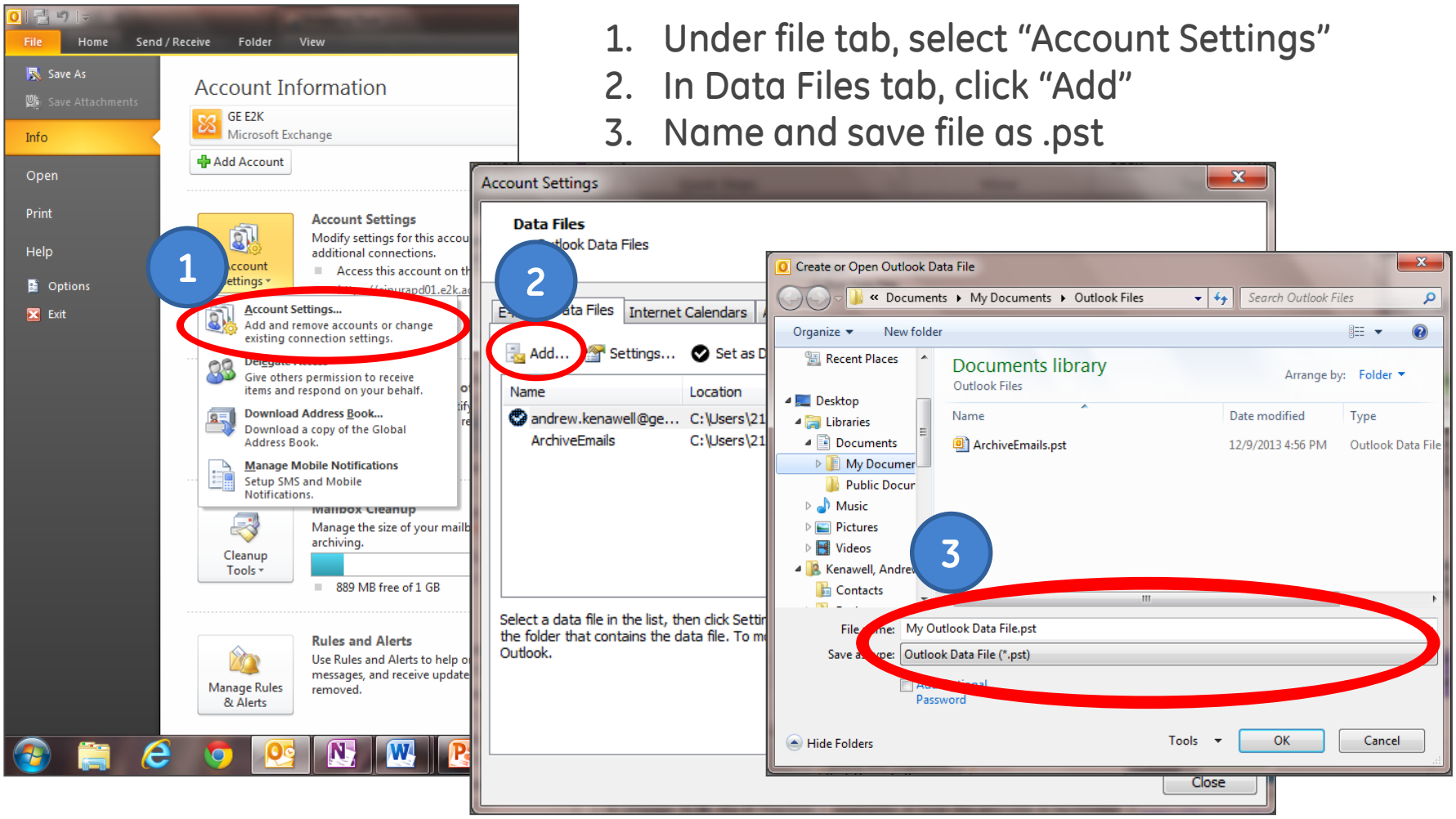
Creating a .pst file.

- File > Account Settings > Data Files > Add

Emptying deleted items.

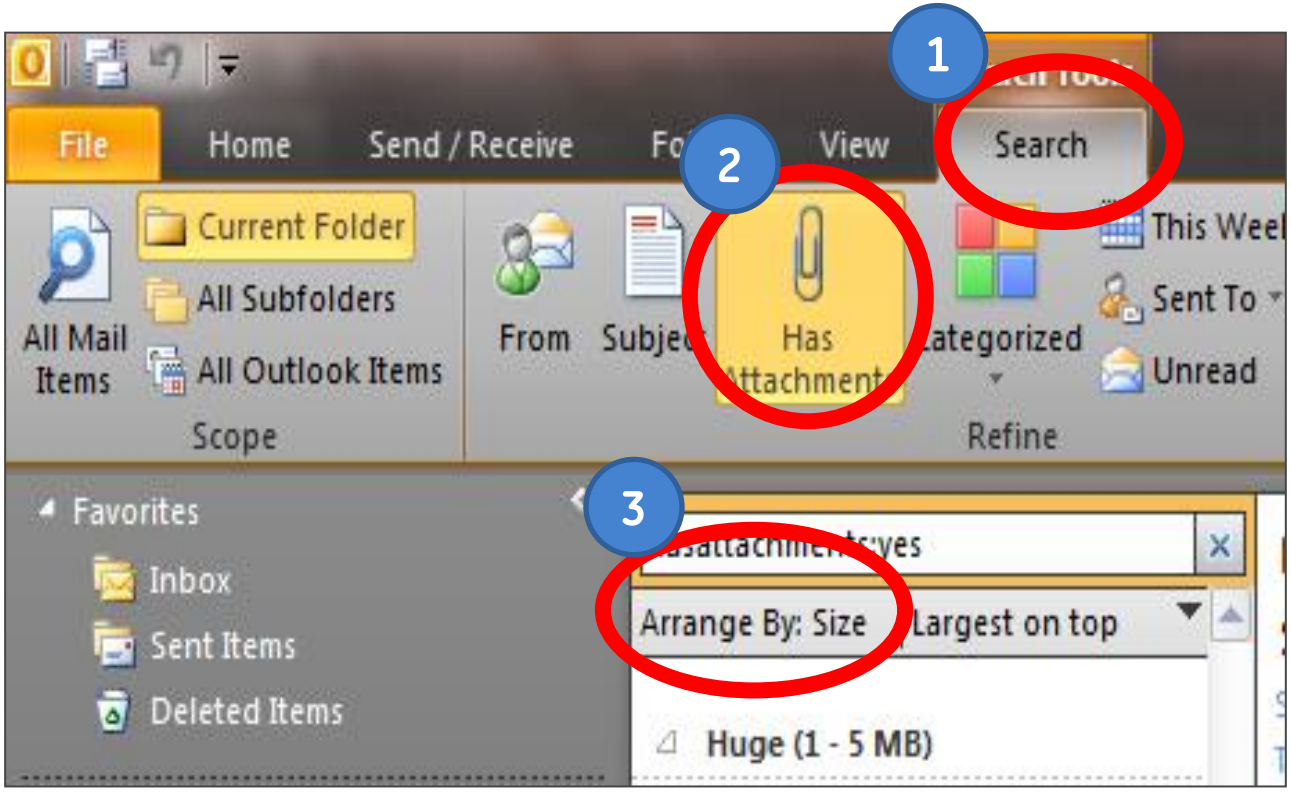
- When you delete an item it is sent to the deleted items folder
- To free up space, permanently delete the items in that folder

Creating a .pst File



1. Under file tab, select “Account Settings”
2. In Data Files tab, click “Add”
3. Name and save file as .pst

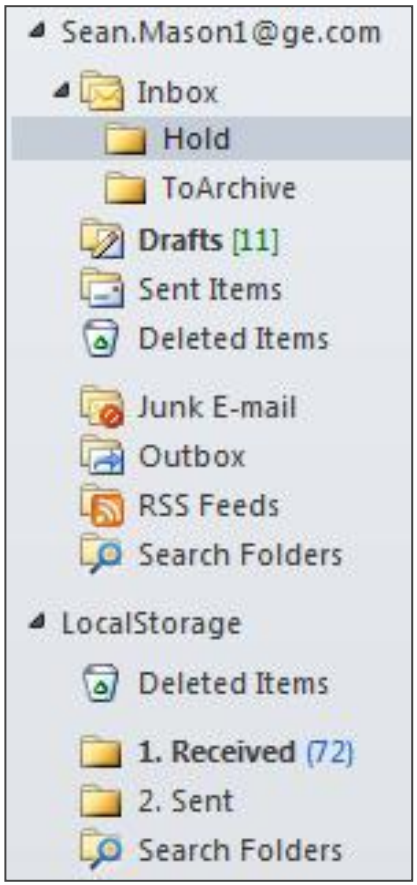
Searching by Attachments



Put your curser into the search box and follow directions below.

1. Select Search
2. Choose “Has Attachment”
3. Click “Arrange By” and select “Size”
4. Delete or move biggest files to .pst

Inbox Zero



"An email management approach aimed at keeping the inbox empty or close to empty"

Folders

- **Inbox:** Only actionable items and meetings
- **Hold:** Travel info, news articles and for reference
- **To Archive:** When on mobile device move emails to this folder to move to local storage

Local Storage (.pst)

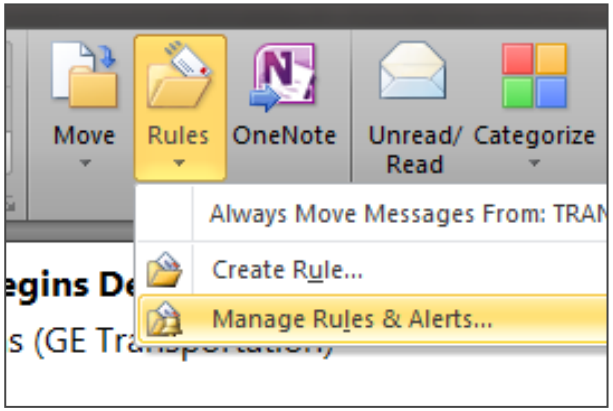
- **Received:** All emails eventually end up here in your local storage
- **Sent:** All sent emails – periodically saved here to save memory

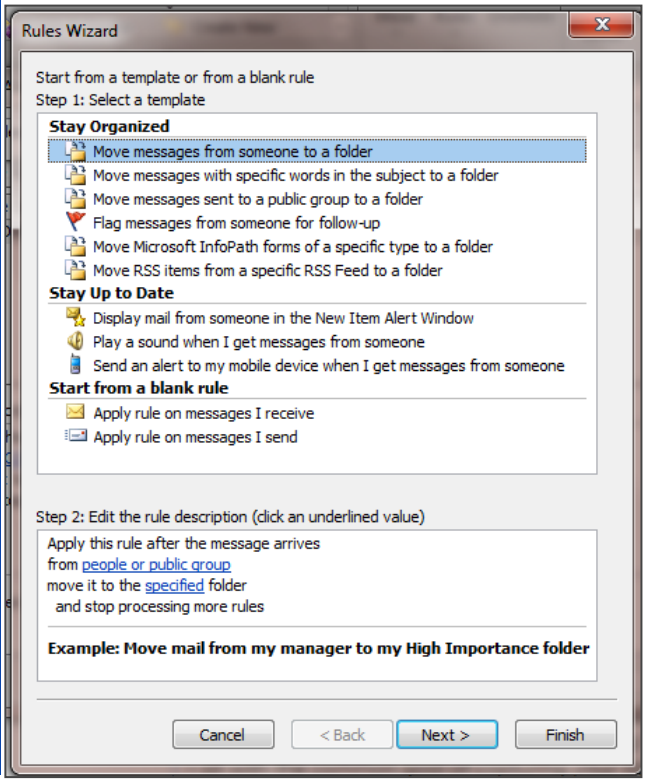
Rules

A rule is an action that Microsoft Outlook takes automatically on an arriving or sent message that meets the conditions that you specify in the rule

Navigate to “Manage Rules & Alerts” to create custom rules

The Rules Wizard will guide you through creating rules





Email Functionality

Microsoft Outlook 2010 Tips

December 2013

Imagination at work.

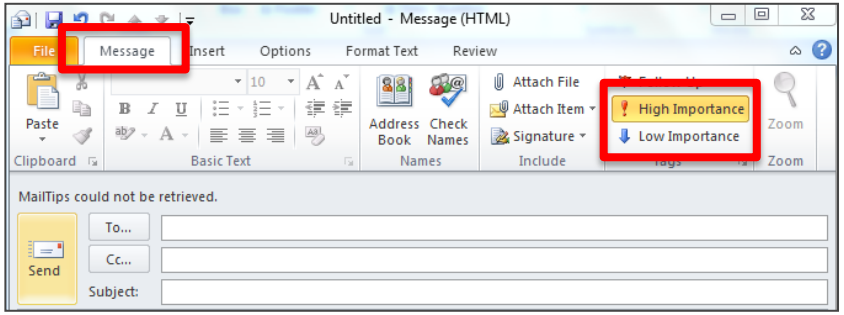
GE Transportation

Overview

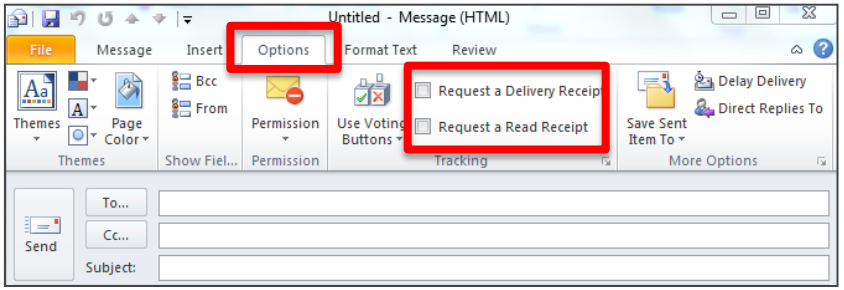
1. Flagging Functionality
2. Email signatures
3. Search email
4. OneNote Integrations
5. Create DL
6. GAL searches
7. Keyboard Shortcuts

Flagging Functionality

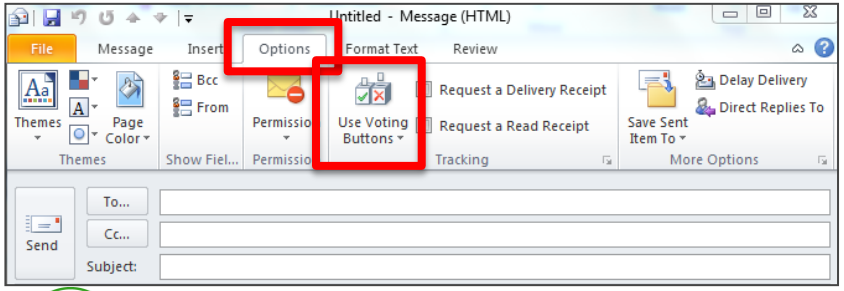
Send a message with high or low importance



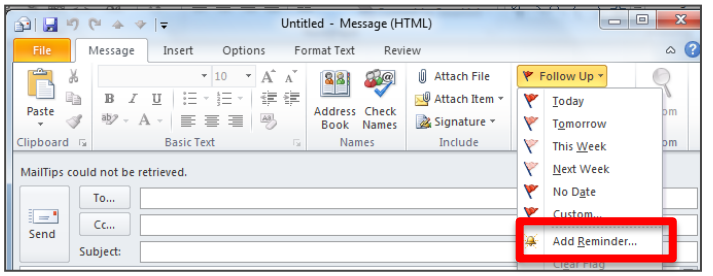
Request a delivery or read receipt



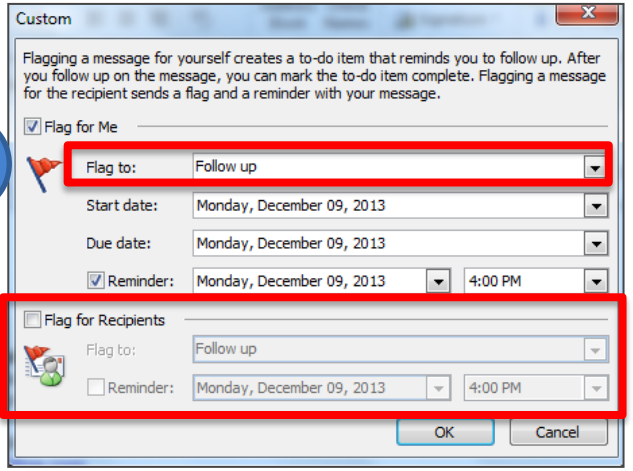
Request a vote from recipient



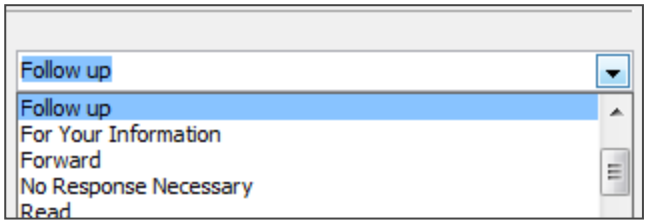
Flag for 1. you or 2. recipients to follow up with reminder



1

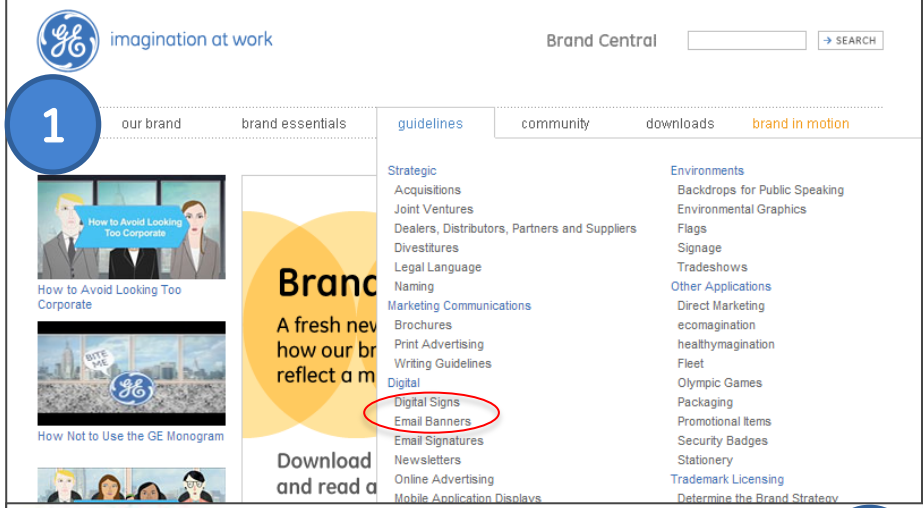


2



Email Signatures

1. Go to brand.ge.com
2. Click Email Signatures
3. Format signature per guidelines



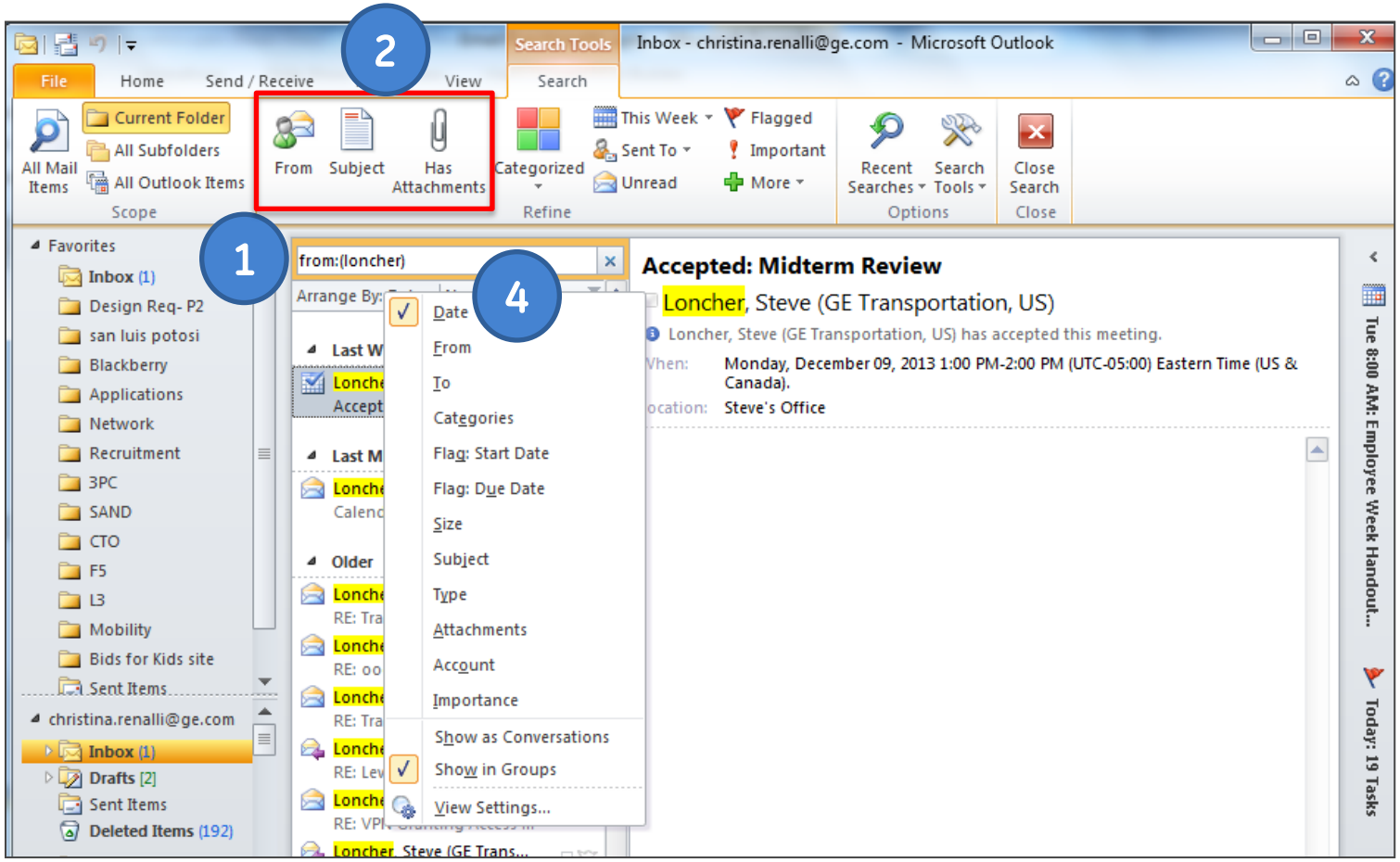
Notes

- Use Arial font (not GE Inspira)
- Use the Email Signature Tool
- Review the detailed Guidelines

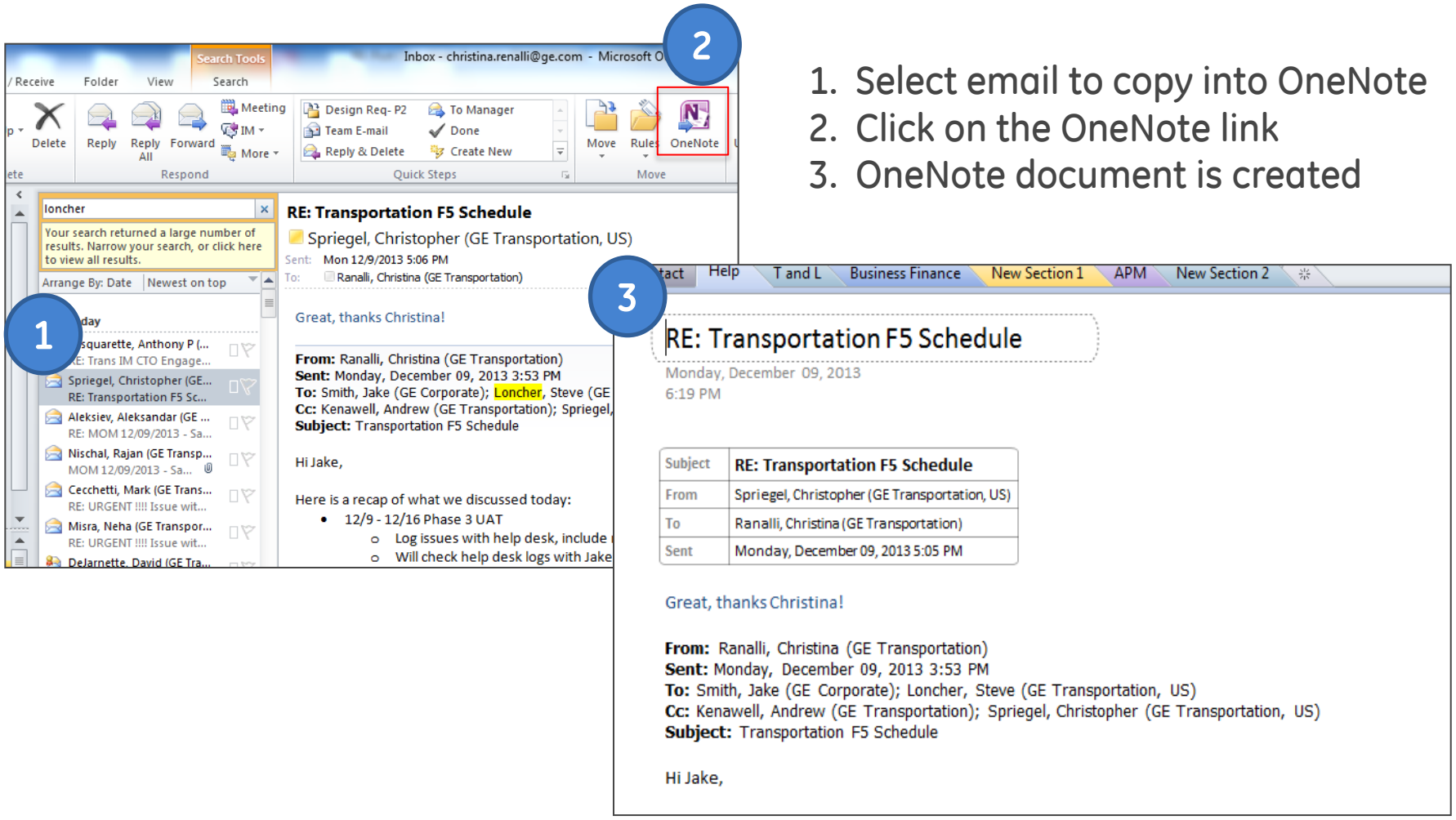
Email Search

By sender, subject, attachments, size, etc.

1. Click in search box
2. Choose search criteria
3. Enter into search box
4. Right click "Arrange by" and choose criteria



OneNote Integrations

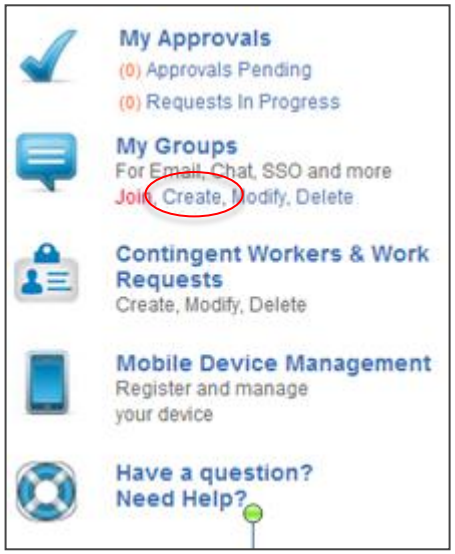


1. Select email to copy into OneNote
2. Click on the OneNote link
3. OneNote document is created

How to Create a Distribution List

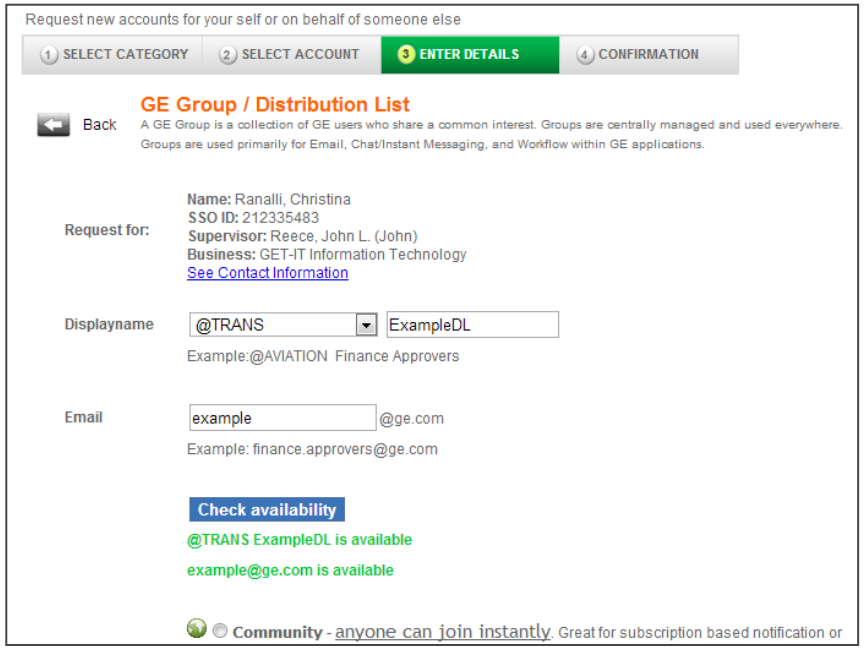
1. Go to idm.ge.com
2. Choose “Create” under “My Groups”
3. Click “Next”
4. Complete details for DL list
5. Confirm

2

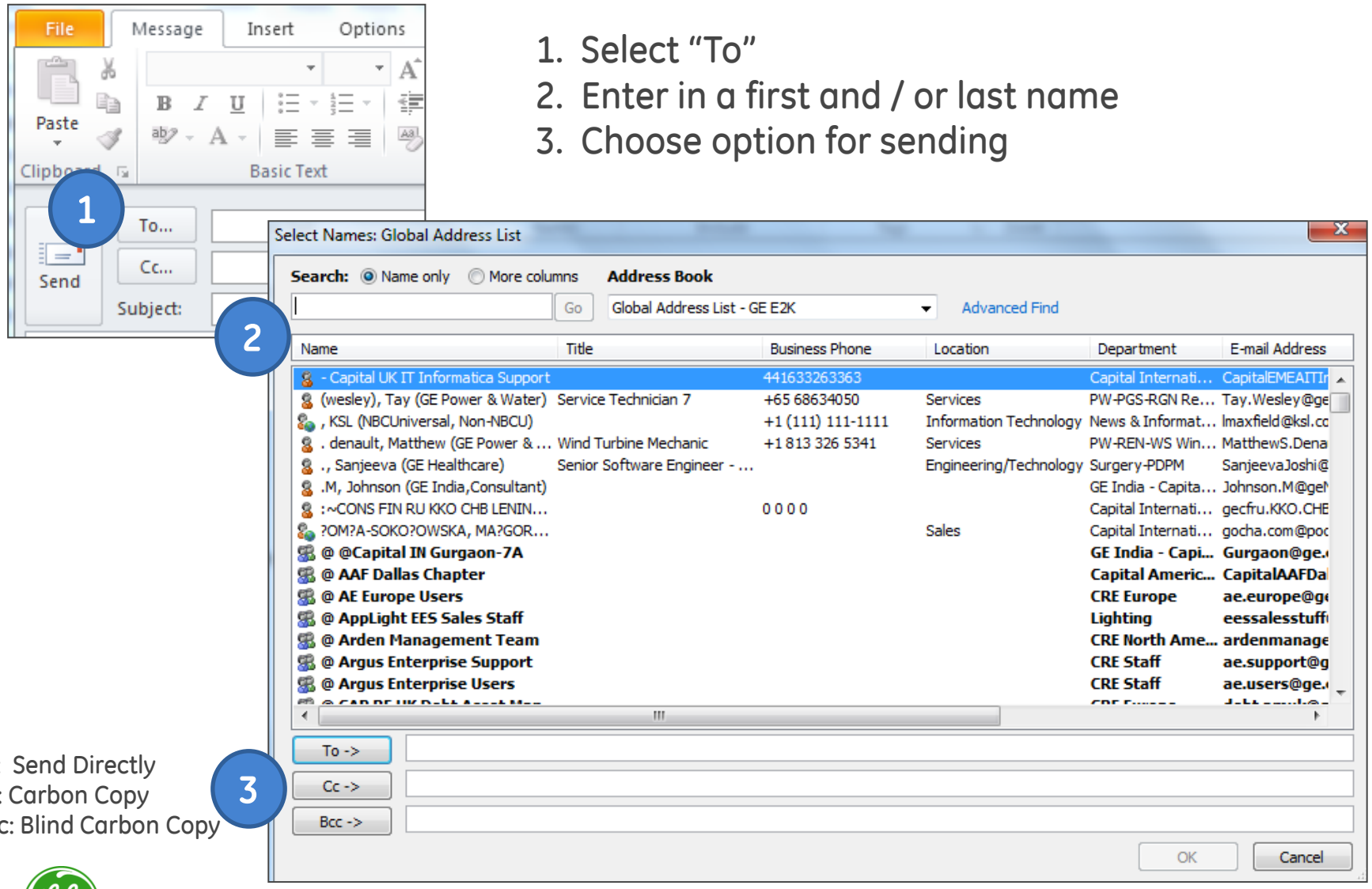


3

4



GAL Search



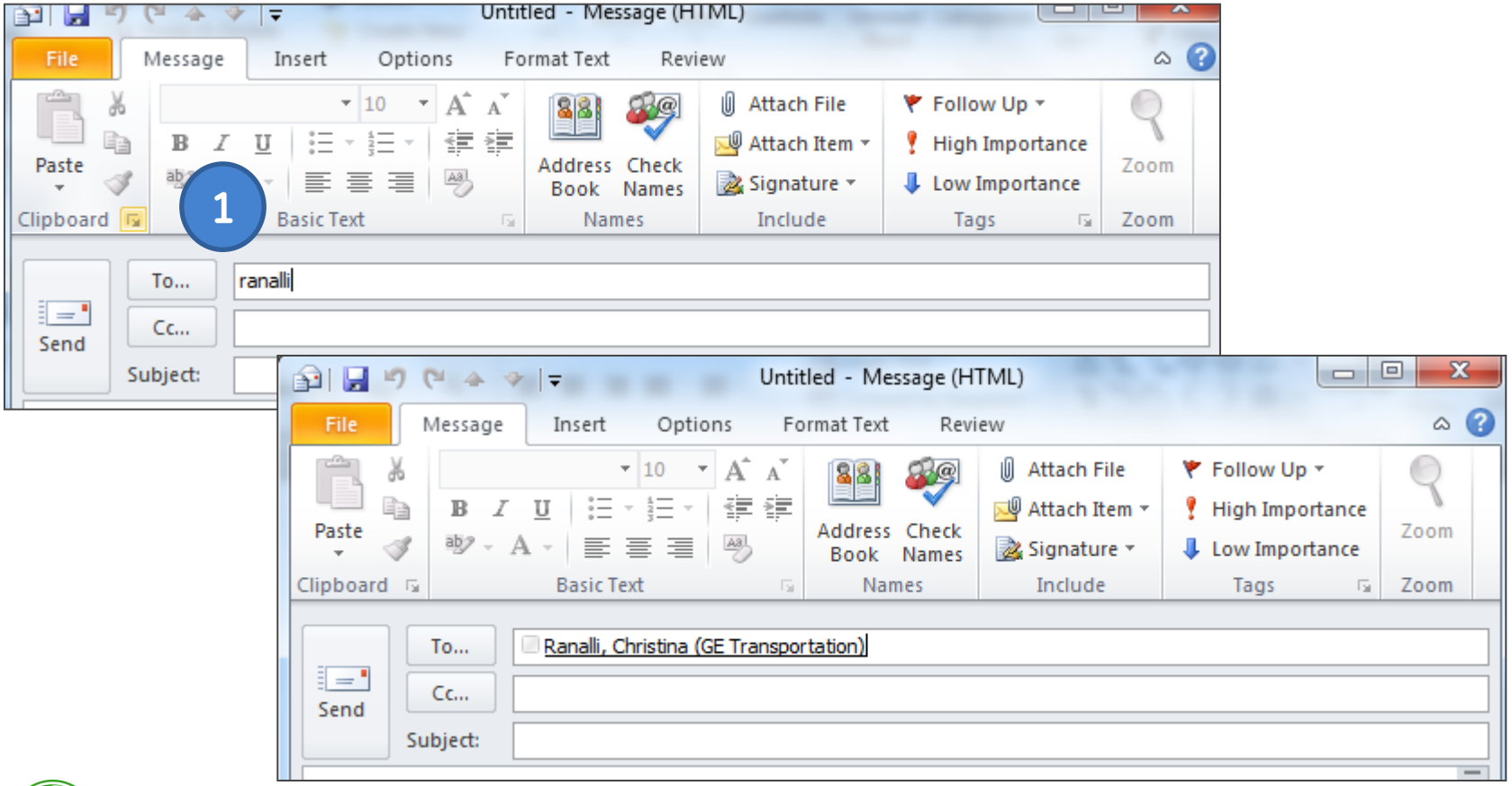
1. Select “To”
2. Enter in a first and / or last name
3. Choose option for sending

To: Send Directly
Cc: Carbon Copy
Bcc: Blind Carbon Copy

Keyboard Shortcuts

To search and populate a name… Ctrl+K

1. Type a first name, last name, or SSO
2. Hit Ctrl+K on keyboard



Calendar Organization

Microsoft Outlook 2010 Tips
December 2013

Imagination at work.

GE Transportation

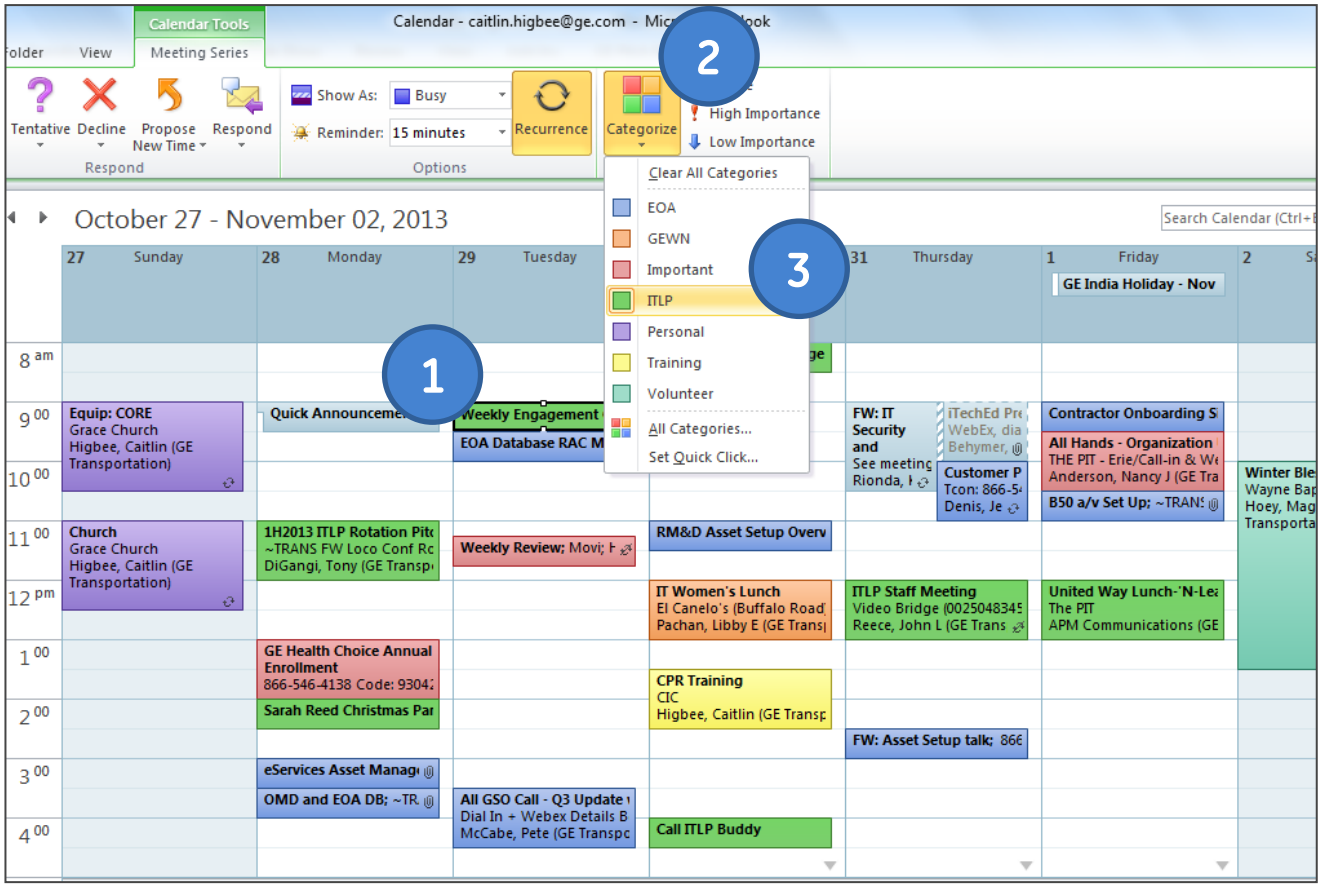
Overview

1. Color coding
2. Search
3. Reserve conference rooms
4. Insert meeting in email
5. View fiscal weeks
6. Manage time zones
7. Sharing calendars

Color Coding

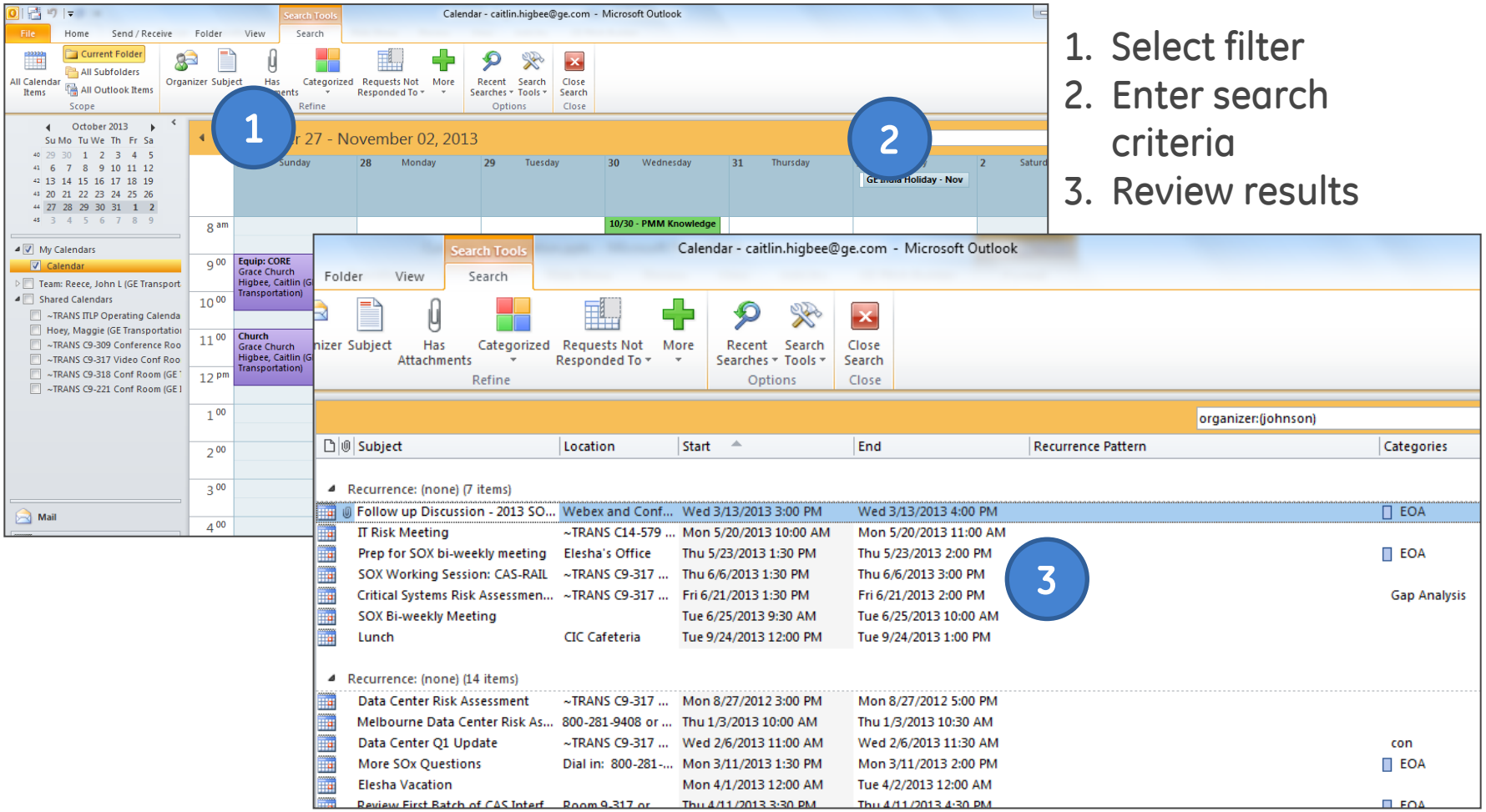
Use colors to group meetings (i.e. Projects, Training, Personal, Volunteering)

1. Select meeting
2. Click Categories from Ribbon
3. Choose categories



Search

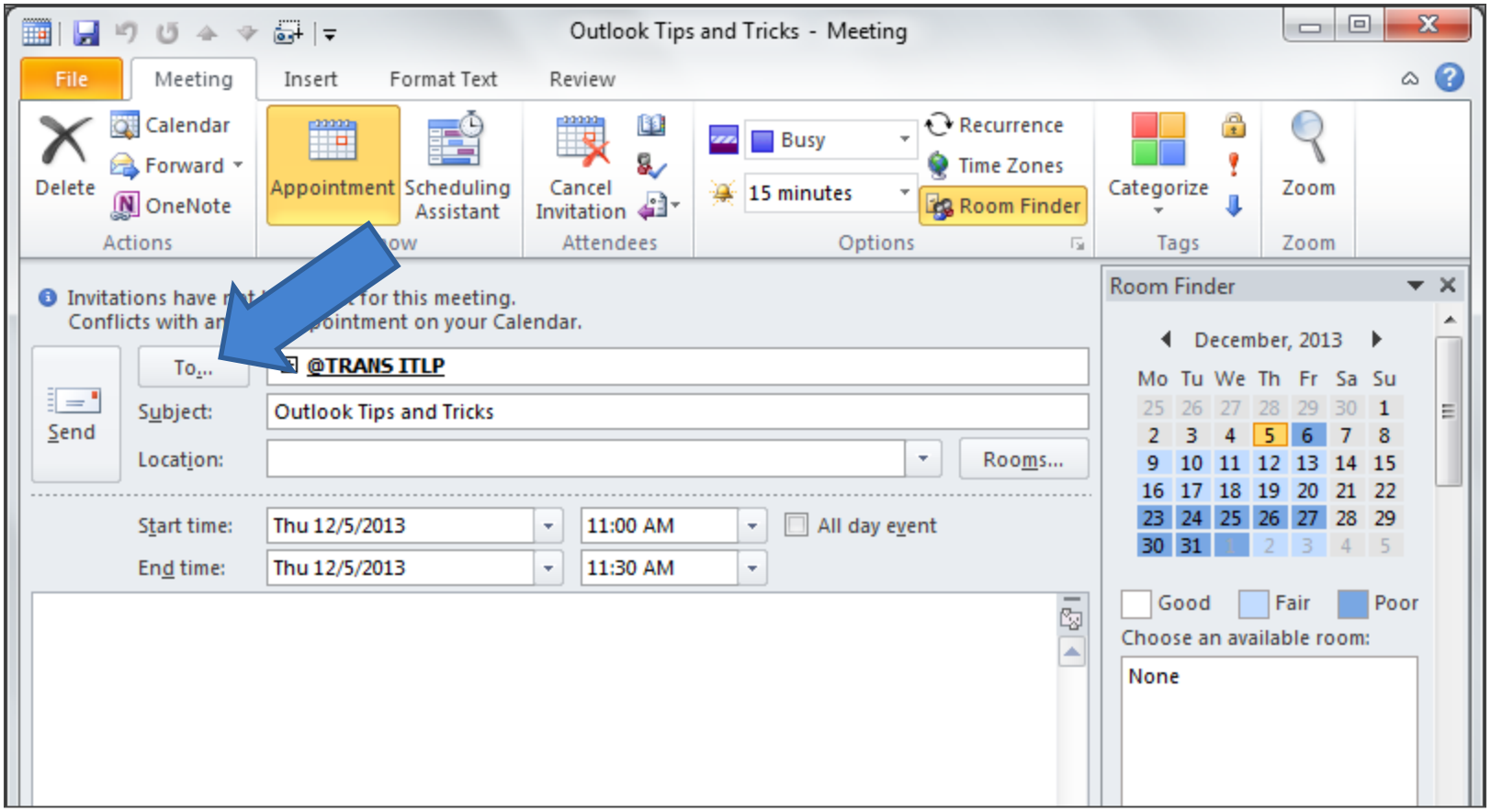
By organizer, subject, attachments, categories, etc.



1. Select filter
2. Enter search criteria
3. Review results

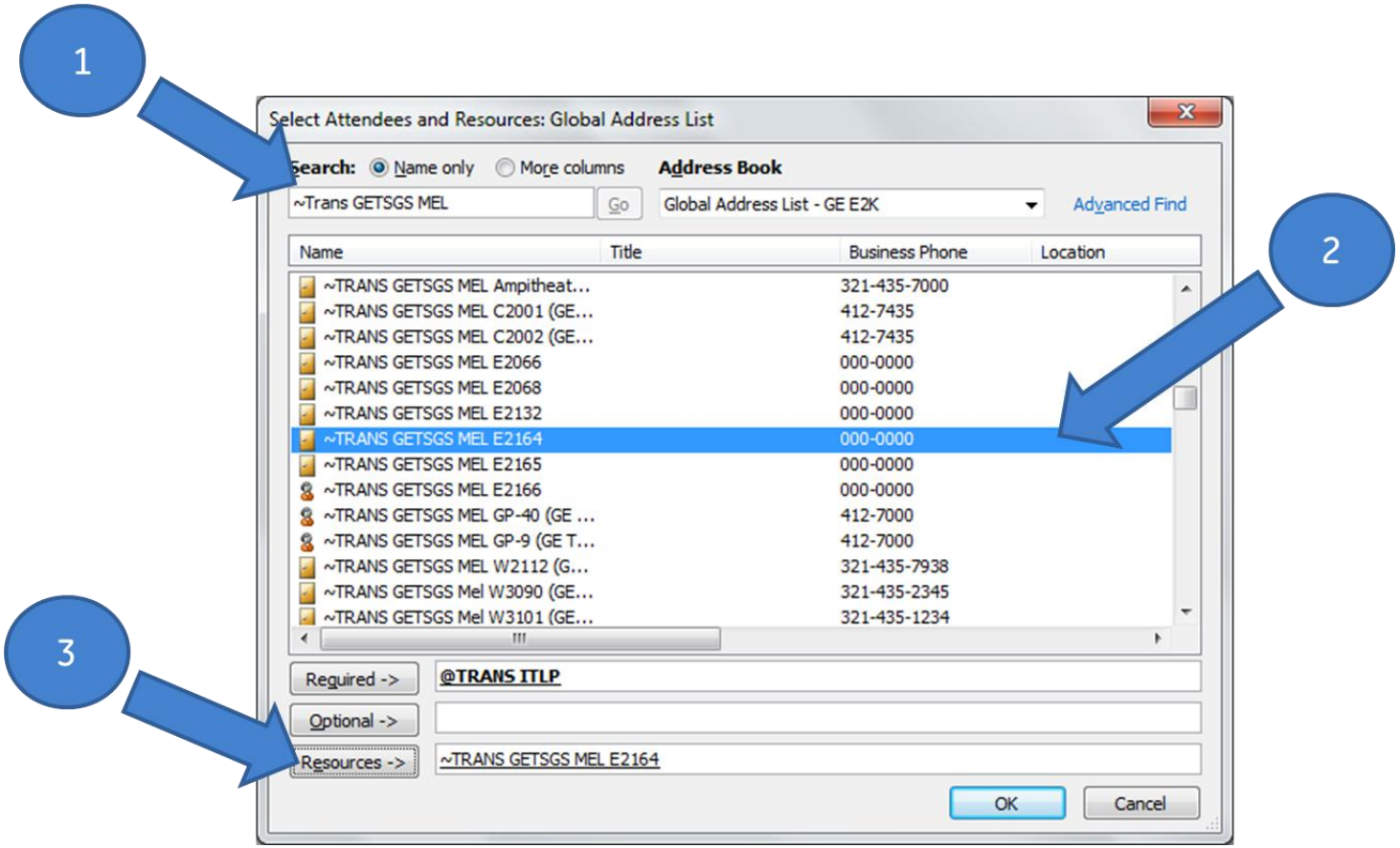
Reserve a conference room

Don't just put the room in the "Location field". Click the "To" button on your email screen.



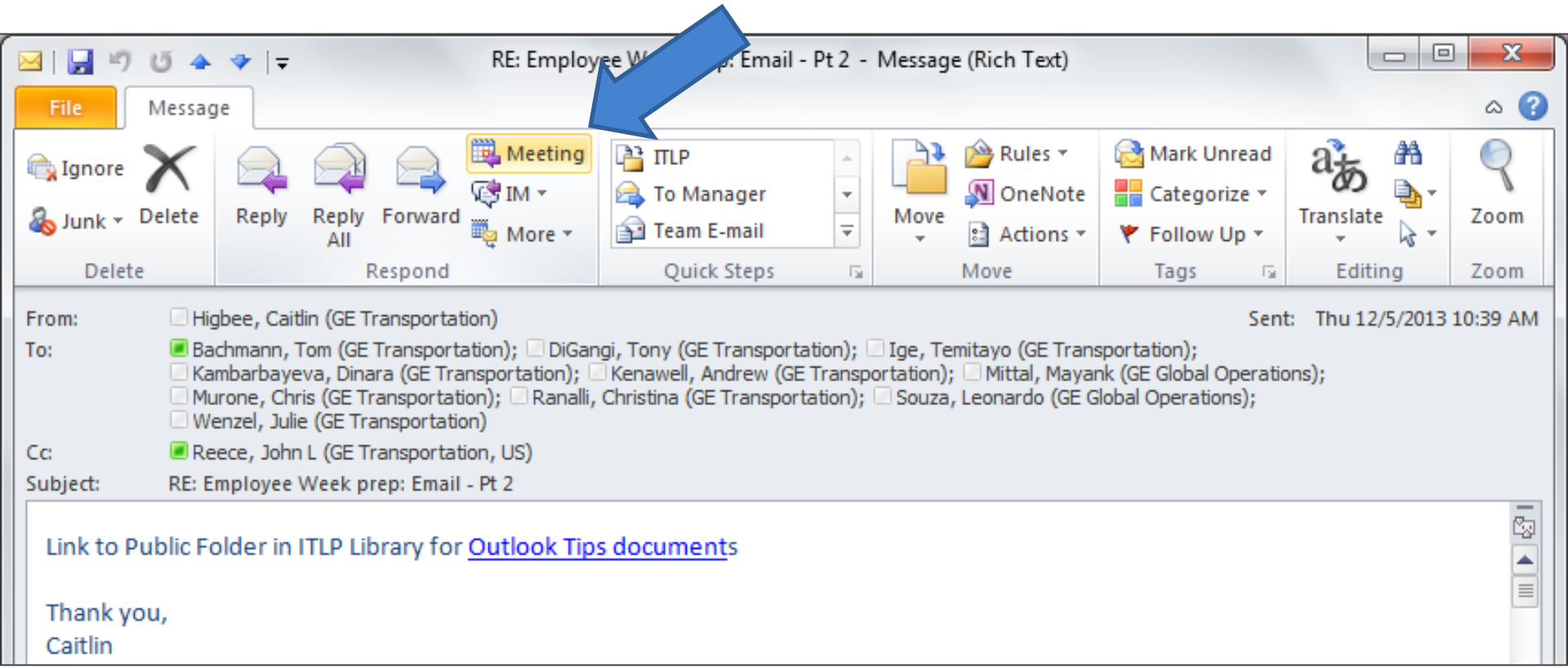
Reserve a conference room

1. Type the name of your conference room
   a) ~TRANS CX – 317 (Replace X with “Building #” – “Room #” for the Erie Plant)
   b) ~TRANS Chicago(Select the desired conference room)
2. Select your conference room
3. click the “Resources” button



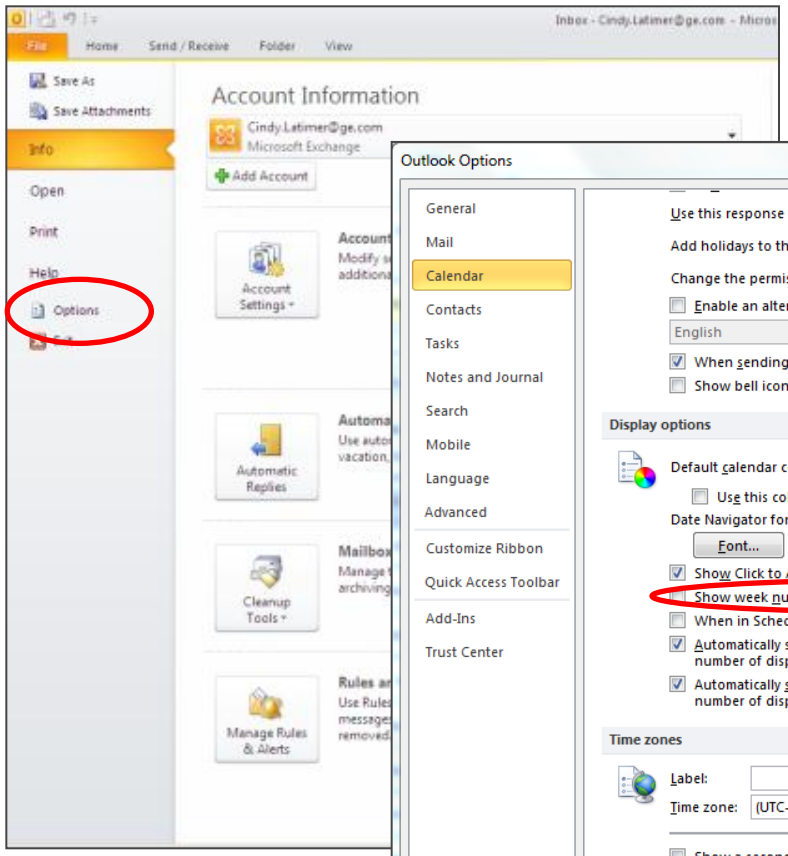
Insert meeting into email

Quickly create a new meeting request that will invite all of the people that received the email, and will pull the email conversation history into the meeting request.

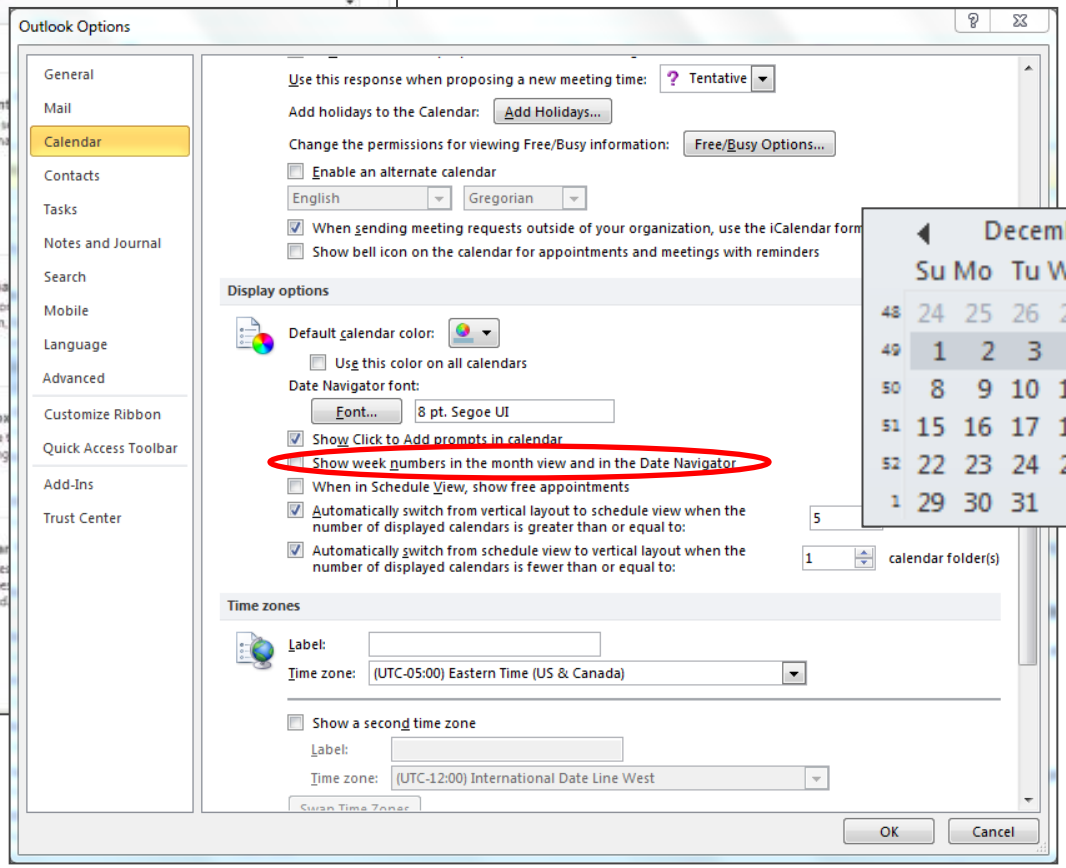


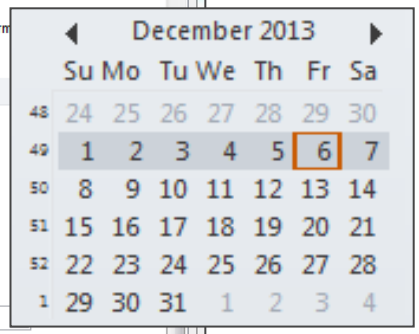
View Fiscal Weeks

1 Options under File tab



2 Under the calendar section, find the Display options, and click Show week numbers.





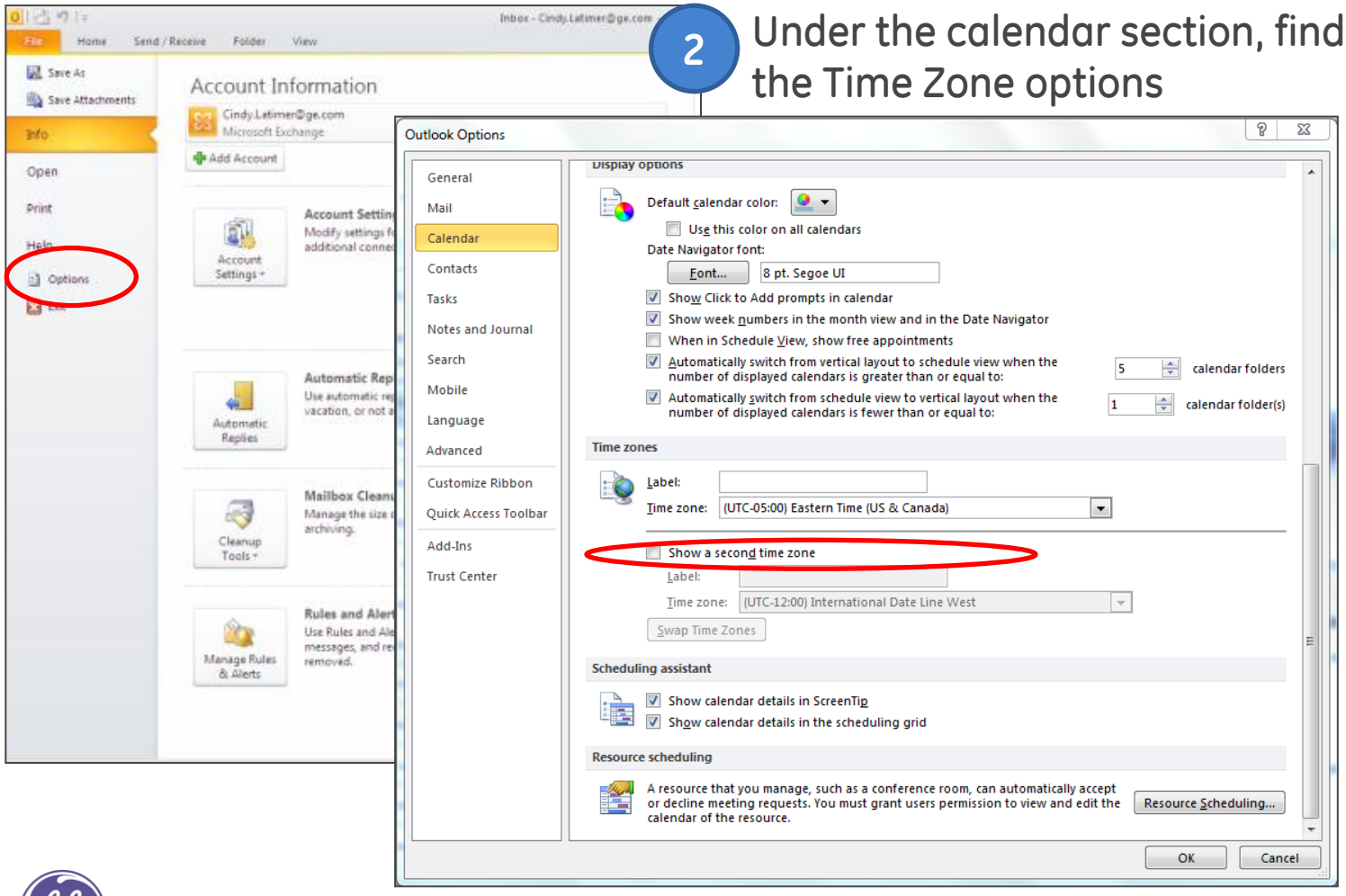
3 You will now see Fiscal weeks in your calendar

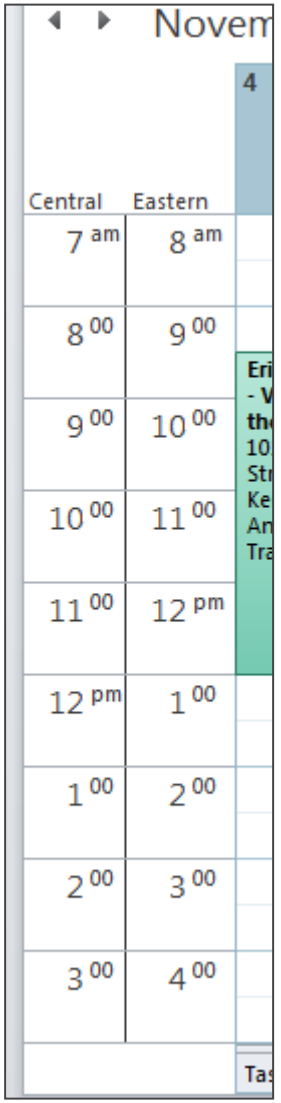
View Multiple Time Zones

1 Options under File tab

2 Under the calendar section, find the Time Zone options

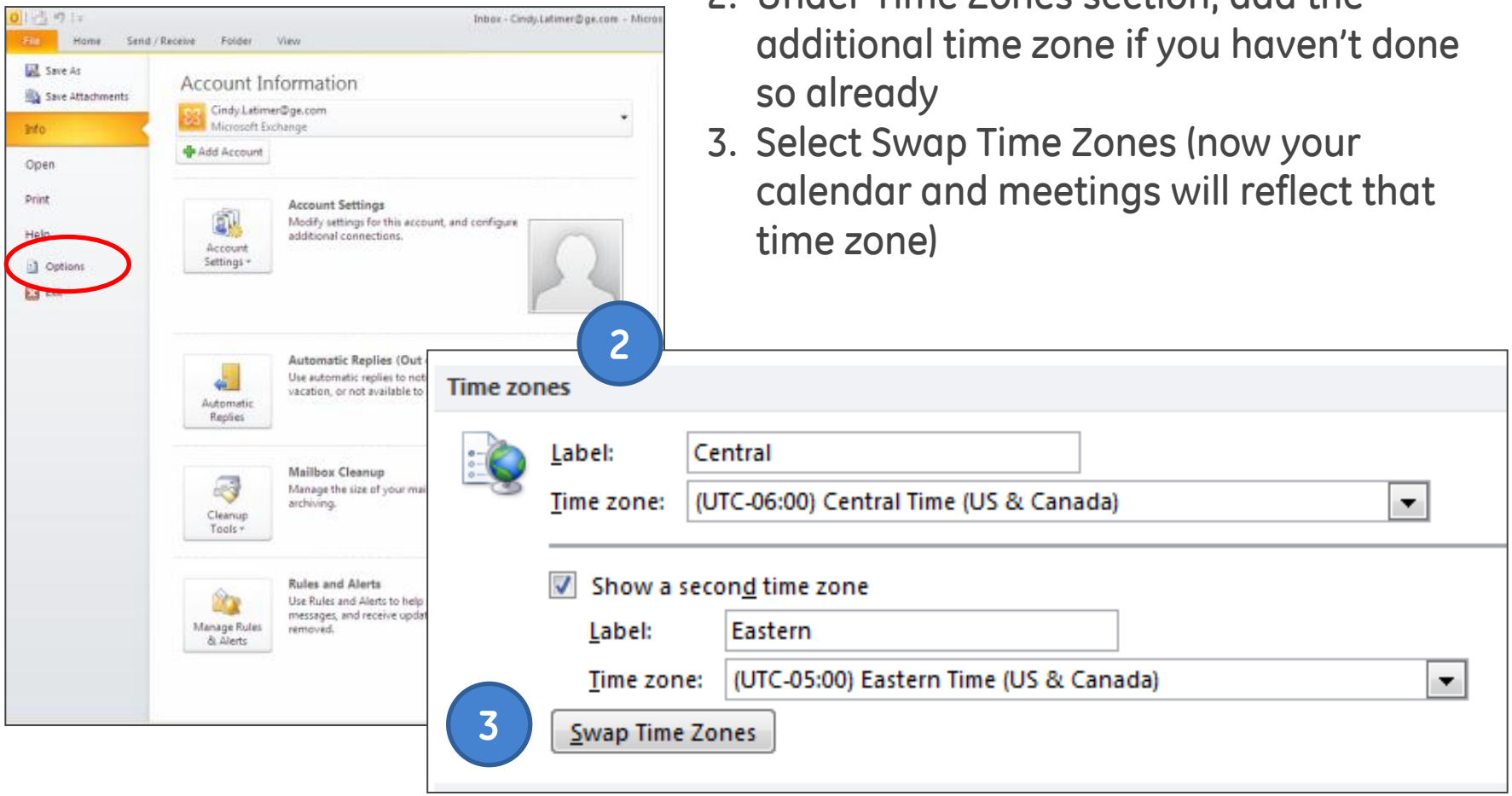
3 You will now see both time zones in your calendar





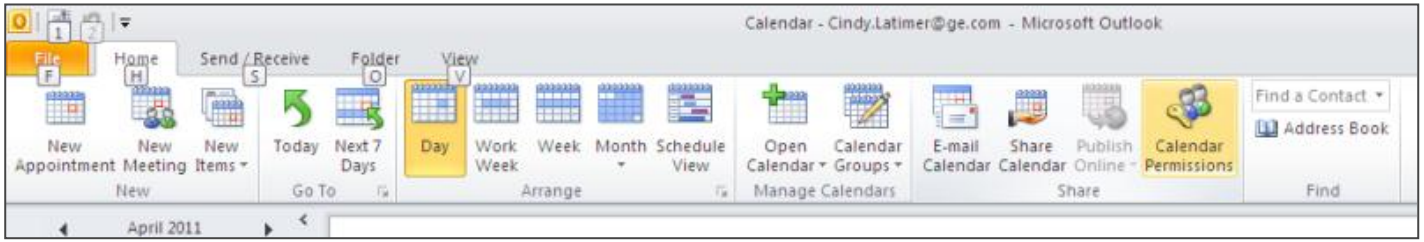
Change Time Zones

1. Selection Options from File tab
2. Under Time Zones section, add the additional time zone if you haven't done so already
3. Select Swap Time Zones (now your calendar and meetings will reflect that time zone)

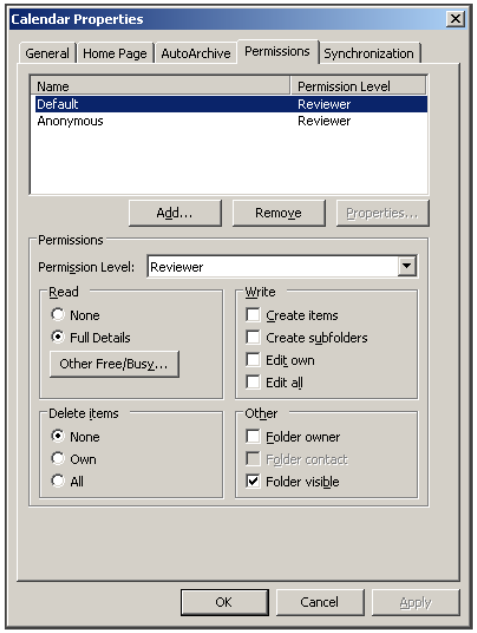


Sharing Availability

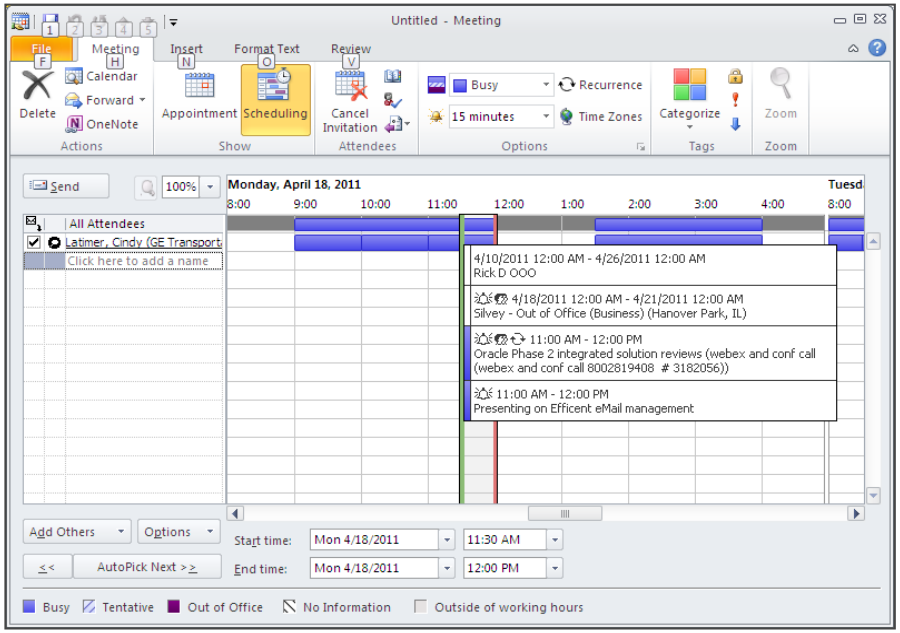
1 Choose Calendar Permissions in the Home Ribbon



2 Allow for 'Default' to see full details

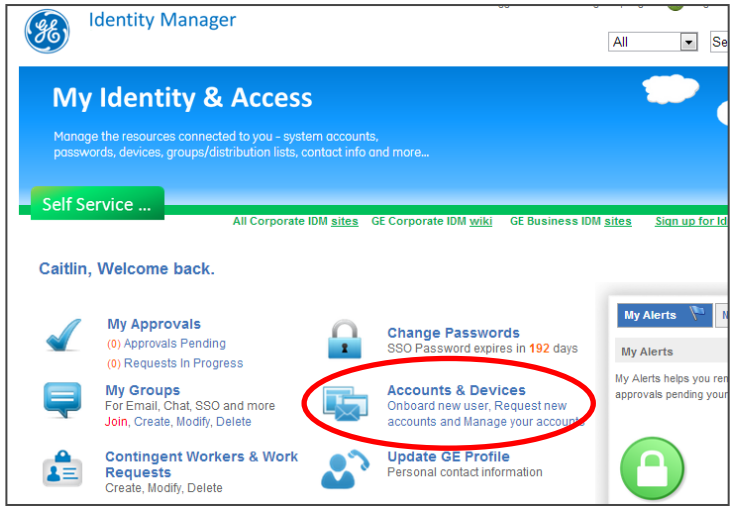


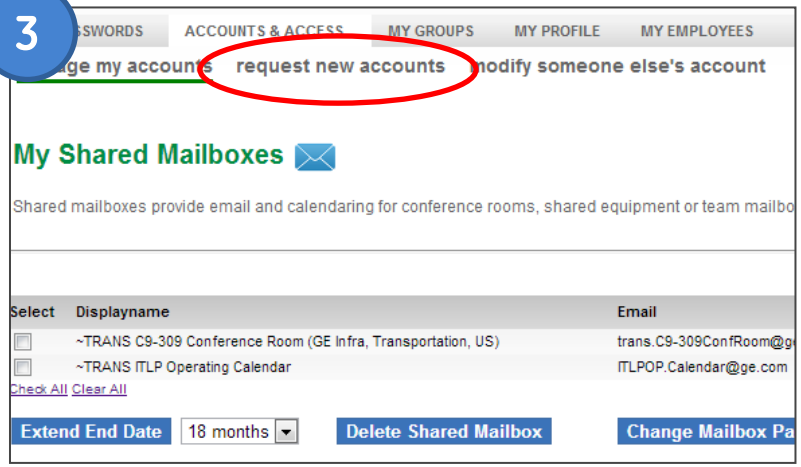
3 People can now see the details of your calendar appointments



Shared Calendars

1 Go to: www.idm.ge.com



2

3