









General Outlook Tips

1. Display Outlook Today
 - a. Mail | Click on the top-level email account address to display a customizable "Day at a Glance" view of Outlook
2. Change Outlook's default starting location
 - a. File | Options | Advanced | "Start Outlook in this folder:" | Browse to desired folder
 - i. Select the top-level email account address if you wish to open Outlook to the Outlook Today view
3. Change Navigation Pane Options
 - a. Click the small down-pointing triangle  ("Configure buttons") at the bottom of the Navigation Pane from any Outlook screen | select Add or Remove Buttons | click on any buttons you want available in the Navigation Pane (i.e. Folder List, Journal, etc.)
 - b. Journal is "Off" by default
4. Check out the other Outlook components you may not be familiar with: Tasks, Notes, and Journal
 - a. Tasks – a digital Task List and/or To Do List that integrates well with Outlook and OneNote!
 - b. Notes – Digital "post-it notes"
 - c. Journal – Automatically track and/or time spent on specific digital activities
5. Change the default Address Book location(s)
 - a. On the Home tab from any Outlook screen | select Address Book
 - b. Select Tools | Options
 - c. Select the desired order to check address lists when sending e-mail
 - d. Select the desired address list to show first when opening the address book
6. Searching the Address Book
 - a. Select the "Name Only" option (if necessary), enter the first few letters of the **Last Name** in the Search: box – DO NOT press Enter!
 - b. Double-click the correct name, OR
 - c. Select the "More columns" option, enter any part of the **first or last name** in the Search: box – Click Go to complete the search
7. View all Outlook folders (Mail, Calendar, Notes, Tasks, Contacts, Journal)
 - a. On the Navigation Pane from any Outlook screen | click the Folder List button (all of your Outlook folders appear – not just Mail or Calendar folders!)
8. Quick Access Toolbar
 - a. Appears above the Ribbon by default – click the down-pointing triangle next to the Quick Access Tool bar | select Show Below Ribbon 
 - b. Right-click any tool in the Ribbon | select Add to Quick Access Toolbar
 - c. See File | Options | Quick Access Toolbar for more customization options

9. Send/Receive All Folders – to check for new Mail or new Calendar entries
 - a. Keyboard Shortcut = F9
 - b. Click Send/Receive All button on Quick Access Toolbar,  OR
 - c. Click the Send/Receive tab | Send/Receive All Folders
10. Create Local Folders (offline storage)
 - a. File | Account Settings | Account Settings | Data Files | Add | Select "Outlook data file (.pst)" | OK | enter a File name: | OK – see the local folder at the bottom of the folders list in Mail or Folder List – local folders are not available from any other computer
11. Customize the Ribbon
 - a. File | Options | Customize Ribbon
 - b. Click a tab | New Group | Rename | Click on the group | select a command | Add, OR
 - c. Click New Tab | Rename | click the New Group | Rename | select a command | Add



Outlook E-mail Tips

1. Color code your Inbox
 - a. Click the View tab | View Settings | Conditional Formatting | Add | enter a Name:
 - b. Click the added option in the "Rules for this view:" list
 - c. Click Condition . . ., then choose the appropriate condition(s) to format selected messages automatically | OK
 - d. Click Font . . . | select the options you want to make selected messages 'stand out' from the rest of the messages in the Inbox | OK | OK
2. Collapse/Expand Date: Groups 
 - a. Click on each date grouping to collapse or expand individual groups, OR
 - b. Click the View tab | Expand/Collapse | select desired option
3. Change Mailbox Grouping
 - a. Click the View tab | View Settings | Group By. . .
 - b. Uncheck "Automatically group according to arrangement" if you don't want to group mail by "Date: Today:, Date: Yesterday, Date: Last Week, etc.
4. Find Related Messages – quickly finds all messages with the same Subject: or from that same Sender
 - a. Right-click a message | Find Related | Messages in this Conversation/Messages from Sender
5. Use Conversation View – View all messages in a message "thread", regardless of where they're stored!
 - a. Click the View tab | check Show as Conversations | This Folder 
 - b. Click a white triangle to the left of each conversation to expand it 
 - c. Click a message in the conversation to see lines indicating which message is being replied to
 - d. Uncheck Show as Conversations | This Folder to return to the normal view

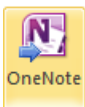
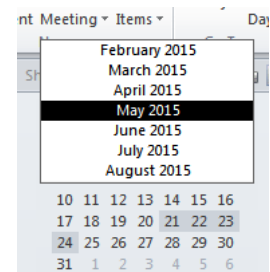
6. Ignore Messages in Conversations – stop receiving future messages with this topic!
 - a. Select a message | click the Home tab | Ignore | Ignore Conversation
 - b. All messages in this conversation will be moved to the Deleted Items folder, including any future messages with that same Subject
7. Clean Up Conversations
 - a. Click the Home tab | Clean Up | Clean Up Conversation/Clean Up Folder /Clean Up Folder & Subfolders
 - b. All redundant messages in this conversation will automatically be moved to the Deleted Items folder – only the last message in the conversation which contains all copies of all of the messages in the conversation(s) will remain
8. Quickly Include Screenshots in Messages – inserts captured screenshot directly into the e-mail message body
 - a. Open the application(s)/screen(s) you want to capture into another window
 - b. Click the Home tab | New E-mail
 - c. In the new message window, click the Insert tab | click in the message body | click Screenshot | click on the desired window to capture, OR
 - d. Click Screenshot | click "Screen Clipping" | click and drag the cross-hair mouse pointer to select the desired portion of the screen to be captured – **great for documenting 'error messages' when requesting help!**



Outlook Calendar Tips

1. Appointments vs. Meetings
 - a. An appointment automatically becomes a meeting when you Invite Attendees
2. Quick Appointments
 - a. Click in the Calendar on the correct Date/Time | Type the Appointment Subject | press Enter
3. Quickly Set the Appointment or Meeting Time Before Opening the Appointment/Meeting Window
 - a. Click on the Start Date/Time in the Calendar and drag through the End Date/Time to select that time block
 - b. Right-click the selected cells | click New Appointment or New Meeting Request – the Date/Time will already be complete in the request form
4. Change the Calendar View
 - a. Click the View tab | Time Scale – to select desired time intervals (60 min., 30 min., 15 min., etc.)
 - b. Click the View tab | Overlay to lay a calendar on top of another calendar
 - c. Click the View tab | Daily Task List to display Tasks below the personal calendar
 - d. Click the View tab | Color to select different colors for each calendar you open
 - e. Click the View tab | click the dialog launcher (small arrow) in the Arrangement group to make changes to the Calendar Options

5. "Other" Calendar Views (not available as buttons on the Ribbon!)
 - a. To view a specific number of days (i.e. 3 days rather than 5 or 7!) – open a calendar to the first day you want to display
 - b. Press ALT + 0 – 9 (0=10 days, 5=5days, etc.) for the number of consecutive days to display
 - c. Click on Day, Work Week, or Week to return to the normal view
6. To view non-consecutive days "Side by Side"
 - a. Click the first date in the Date Navigator (at the top of the Navigation Pane or the To Do Bar)
 - b. Hold down the CTRL key, then click on the next date, CTRL+click additional dates until all needed dates appear in the Calendar
7. Recurring Meetings **with a Difference** - Use this tip to create Recurring meetings where the location and/or day of the week or time must be different for some of the meeting occurrences!
 - a. Meetings created with "Recurrence" selected will all have the same Location and the same Time scheduled for all meetings in the series
 - b. Create the first instance of the meeting – **DO NOT** select "Recurrence"
 - c. Select the meeting in the Calendar (click on it)
 - d. Copy the meeting (Ctrl+C)
 - e. Navigate to the next date/time in the series, click in the Calendar where you want to schedule the meeting and Paste (Ctrl+V)
 - f. See Tip #3b above to display non-consecutive dates side by side for easier copy/paste operations
 - g. Double-click the copied meetings to Edit the meeting, add/change any necessary details | Save & Close or Send
8. Quickly Select Different Months/Years in the Date Navigator (the small monthly calendar)
 - a. Locate the Date Navigator at the top of the Navigation Pane or the To Do Bar
 - b. Click and hold down the left mouse button on the current Month displayed
 - c. Drag the mouse above or below the Date Navigator until the desired Month/Year appears in the scrolling list – click the Month/Year to set it
 - d. You can use this trick to schedule recurring meetings years in advance!



OneNote 2010 – Outlook Integration Tips

1. Send selected e-mail messages to OneNote for easy storage and retrieval later – then delete the message from Mail
 - a. In Mail, click a message to select it
 - b. Click the Home tab | OneNote | select a Notebook and/or Notebook Section to store the message in | OK
 - c. Use OneNote's Search box to search across notebooks, sections, and pages to find the copied e-mail message easily

2. Linked Meeting Notes (Meetings scheduled on Calendar and Notes taken in OneNote are linked together for easy access and search functions later)
 - a. In Calendar, click a meeting to select it
 - b. The Calendar Tools | Meeting contextual tab appears on the Ribbon – click OneNote |select a Notebook and/or Notebook Section to store the linked meeting notes in| OK
 - c. Once the linked Meeting Notes page is created in One Note, enter any notes you need
 - d. To **open** the linked OneNote notes **from Outlook**:
 - i. In Outlook, click the meeting in Calendar | click the Home tab | OneNote
 - e. To **open** the linked Meeting in Outlook Calendar **from OneNote**:
 - i. Open OneNote, open the Notebook, Section and Page where the linked meeting notes are stored (or use OneNote's Search tool to find the linked meeting notes)
 - ii. Click the "Link to Outlook item" link in the notes page
3. Create Outlook Tasks from OneNote notes – automatically adds a task to the Outlook Tasks and the To Do Bar and flags the note in OneNote
 - a. Open or create a note in OneNote
 - b. Place the cursor in the note where you wish to add an Outlook "Flag"
 - c. Click the Home tab | Outlook Tasks | select a date flag
 - d. Open Outlook | Tasks – the task should be added in the Tasks list – it will also appear in the To Do Bar in Mail and Calendar as a Flagged Task
4. Open a flagged Outlook Task from OneNote
 - a. Locate the flagged note in the appropriate notebook (use the Search tool, if necessary)
 - b. Right-click on the Flag symbol in the note | select "Open Task in Outlook", OR
 - c. Click the Home tab | click "Find Tags" | scroll through the tagged items until you see the Flagged Items | click on the item in the Tags task pane
5. Add Meeting Details from Outlook Calendar to Notes in OneNote (Subject, Date/Location, Attendees, and Notes)
 - a. Position the cursor in a OneNote note page
 - b. Click the Home tab | Meeting Details | select a current day's meeting, OR click "Choose a Meeting from Another Day" | click on the meeting | Insert Details

Please note: These Outlook Tips 'n Tricks may not all apply directly to Outlook 2011 for Macintosh – the menus, Ribbon tabs, and command buttons may be different. Many of the same options will be available, but may be accessed in different ways.

These Tips DO NOT apply to Outlook 2008 or Entourage for the Macintosh.