Work smarter in Outlook

Individual mail governance and task handling

How-To-Descriptions

Outlook 2016, UK user interface (menus are in English)

OBS!
This is your *How-To-Description Paper*, an addition to your *Working Paper*.

BestPerformance
overblik & effektivitet

Control your inbox!

To be archrived?

- Use as FEW and general folders as possible, page 6

- Use search function in stead of folders, page 6

- Use a miscellaneous mail folder

- Drag the most used folders to the top

- Use the Favorite window for the most commonly used folders, Search folders and shared inboxes

- Use Search Folders to filter out specific mails (unread or categorized), page 6

To be deleted?

- Permanent deleting (Shift+Delete)

- Automatically delete future mails in a specific mail thread that don't concern you (Ctrl+Delete)

Keep in inbox?

- All mails (use read/ unread)
- All active mails (use marking)
- 24 hour mails

Marking possibilities
- Read/ unread, page 6
- Category (importance, type) p.6
- Own comments, page 7
- Flagging – see tasks.

Marking
Quick Click, page 6
Automatic coloring of mails, page 7
(Cc-mails, senders, code words)

Automatic moving (Rules)
Move mails to folders, page 7
(non time critical mails, meeting acceptances, specific senders, code words in subject)

Show as conversations, page 8
- View all mails in a thread, from all folders (also sent mails)
- Clean up conversations

Setup, page 8
- Reading pane?
- Column or compact layout?

Overview of your tasks

What's in your task list?

- Mails, incomming and sent
- Small reminders
- Recurring tasks
- Projects

Flag or task?
Advantage of flagging: easy from phone
Advantage of tasks: add note, possible to delete mail

Sort by date or category?
Or a combination? Page10

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Follow up on sent mails
Flag mails you are sending.

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Planning and the calendar

Planning
Book time for a task?
Preparation time for appointments?
Drag and drop, page 16

Book meetings, page 13
- Organizer:
  Find next free time (Room Finder)
- Attendee:
  ALWAYS send a quick response

Setup
- Reading pane? Page 20
- Task view? Page 9
- More days view (ALT+number)
- (Automatic) coloring: Desk time, meetings, private, page 18

Folders, archiving and searching

Your folder structure is efficient if you quickly and easily can find the mail your are looking for. At the same time we recommend to use as FEW folders as possible!

Do you sometimes need to save an email in another folder than your Sent mail folder

If you regularly send one type of email (e.g. invoices) that always need to be archived in a special folder, you can set up a Rule to copy it into that folder automatically every time.

Move your folders in the order you want them to be: The ones you use the most should be on top.

> **Save your sent emails into another folder:**
> Go to the Option pane in an open email, and before you send it press the button *Save Sent Item to* > Choose *Other Folder*. New window > Pick the folder you wish to save the email in. The latest folders you have archived in will be on top of your list next time.

You should be searching – not looking

- Setup your advanced search fields: From, Subject, Body, Attachment, Attachment contains – See how to under Common features on page 15.

- Use search folders for frequent searches, and also use search folders if you need a regular overview of e.g. unread, flagged or categorized mails, Cc-mails or mails received from specific persons.

> **How to create a search folder:**
> Roll down to the bottom of your folder list and find *Search Folders* > Fold it out: Here you have some standards to use. Activate them by marking them. You can also create your own search folders > Right click the search folder icon and create a new search folder. Define your own criteria > *Ok*.

Marking *possibilities*

- **Read/ unread**
  Roll down over your mails without having them marked read and use short cut to mark them as read = Ctrl+Q & unread = Ctrl+U or double click the mail.

  NB! This setup does not work on the phone. If you read your mails on the phone you need to mark them unread again.

> **Setup emails not to be marked read:**
> Go to the File pane > Options > Choose Advanced > Find the heading Outlook panes and click Reading Pane > Remove the upper two ticks > OK

- **Category:** Mark chosen mails with a category
  Examples: Use it as a quick marking of a high priority mail, or mails you want to return to later.

  It's also possible to sort your mails by category (picture), search on categories and setup a search folder that filters out categorized mails. See more on page 17 under common features.

▲ ■ Categories: 1. prority: 3 item(s)	
Use the inbox for NEW incomming e-mails - not fo...	■ 1. priority
E-mails staying in the inbox should be handled wit...	■ 1. priority
Move the rest to another folder or the task list.	■ 1. priority
▲ ■ Categories: 2. priority: 4 item(s)	
SV: Help	■ 2. prior...
SV: Outlook - question	■ 2. prior...
OneNote training	■ 2. prior...
supervision	■ 2. prior...

- Set up **Quick Click** with the category that you use the most.
  NB! This only works if you use the column view in your inbox – see how on page 17.

- **Add a comment to mails in your inbox**
  (this demands a column view setup)

  Create a column where you can add your own comment
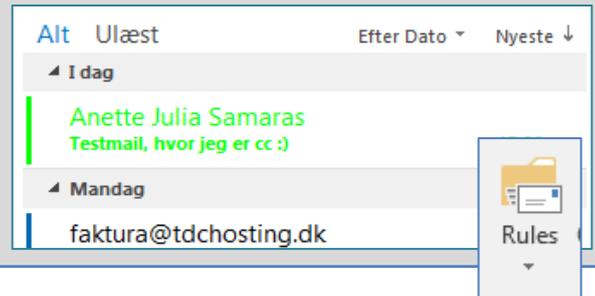 – to yourself only, or to your colleages, if you share an inbox.

Automatizing *possibilities*

- Use **Automatic formatting**
  to automatically highlight the email font on emails from selected senders, words in the subject line, a category or if you are Cc on an email (or other generic criteria). See how to under Common features on .

- Use **Rules** for automatic email handling:

  o   Automatically move non time critical emails away from the inbox into another folder. E.g. from specific senders, news letters, Cc-mails. They can also be set up to automatically being marked as read, so they don't flash as unread in the subfolders, once moved.

  o   Move emails with specific words in the subject (both received and sent mails) to a folder.

  o   Only have a pop up on selected emails.

  o   Add categories to selected emails.

 **How to create a Rule:**
  From the Inbox press *Rules* button on the *Home* pane > *Manage rules and alerts*. New window: Choose *New Rule* to the top left and either pick a pre-defined frame or choose *Apply rule on messages I receive* > Next > Tick off the criteria(s) that should activate the rule > *Next* > Now tick off what should happen (e.g. move mail and mark as read). In the bottom of the window you specify the folder, etc. > *Next* > Tick off any exceptions and/ or press *Next*. Choose *Run Rule* and *Ok*.

  Tip: All the time you can see the rule being built in the bottom of your window.

- Use **Quick Parts** (and AutoText) when you write the same text several times.
  See how on under Common features.
  If you write many standard texts we recommend AntText – search the internet for info.
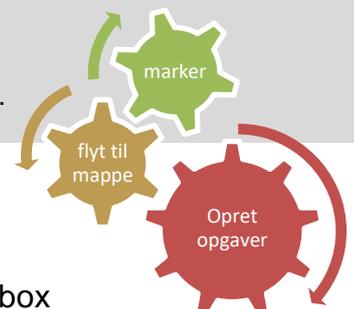
- Use **Quick Steps** easily to administrate your mails in and out of your inbox
  – and for archiving and to send to your task list. 5 best tips for Quick Steps are:

  1. Mails your often mark with a category
  2. …or move to an often used folder (marked a).
  3. if you often create appointments based on a mail
  4. …or create a new task based on a mail.
  5. Mails you often send to the same group of people.
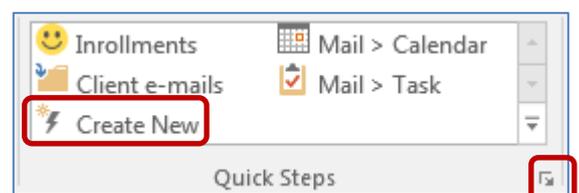
  Quick Steps can do all this one at a time or with one click only.
  Click *Create New* or the little handle in the right corner to administrate your Quick Steps.

Views – possible settings:

- **Reading pane**
  Would you like to add a reading pane? To the right or at the bottom?
  See how on page 20 under common features.

- **Columns or compact layout?**
  Is your inbox workflow best with columns or compact view?
  See how on page 19 and 20 under common features.

- **Conversation view or sort by category?**
  How is the best way to sort your mails? By date, sender, category (priority/ type) or conversatin?

  Sort your mails by conversation to create an overview of all mails in a conversation. Or have Outlook to clean up your conversation threads by using the *Clean Up* button (picture):

  Tip: Setup your folders individually so that you e.g. only use conversation view in one or all of your sub folders.
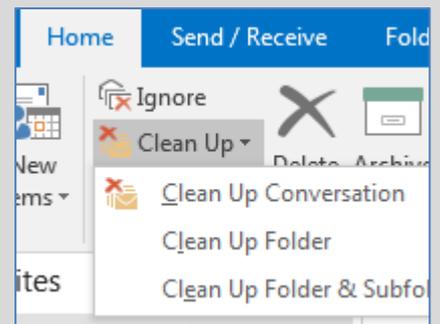
Extra tips:

- **Would you like to switch off the automatic Pop Up? And mayb only enable it on emails from specific senders?**

  In Rules you can choose specific criteria (e.g. senders or words in the subject line) that activate the Pop Up although it is switched off by default.

  > **Remove the pop up window:**
  > Go to the *File* pane > *Options* > Choose *Mail* > Find the heading *Message arrival* and remove the tick from *Play a sound* and *Display a Desktop Alert* > OK

- **Use drag and drop (both right and left click) to copy elements in Outlook.**
  This featue is especially useful when wanting to create a new contact based on a mail and when creating a task with more mails attached. See more on page 16 under common features.

- **Use short cuts** – View more on page 21 under common features.

- **Decide on specific subject code words with your colleagues**
  Specific words or coding concerning a specific project could for example:
  - With a rule automaticially be set up up to move in to a wanted folder.
  - And/ or automatically have a category added (to automatically show in a search folder).
  - With ar rule set up to create a pop up or a sound.
  - With automatic formatting automatically to show with a different color, so it differs out.

6 different ways to create a new task
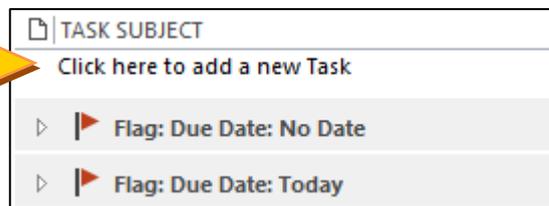
1. Drag a mail to the task button (right or left click)
2. Use the short cut key Ctrl+Shift+K
3. Go into tasks and press *New Task*
4. Write directly in your task list
5. Double click in the task list
6. Write the task in the task list under your calendar on the relevant date

TASK SUBJECT
Click here to add a new Task
▷ ⚑ Flag: Due Date: No Date
▷ ⚑ Flag: Due Date: Today

When creating a new task
- Give the task a relevant name (with action words, e.g. PRINT, CALL, CONTACT)
- Set a *work date* (NB! Use only 1 date and that should be when you plan to work on your task)
- Write or attach relevant info into the task
- And consider if you need a reminder some days or hours before deadline?

Move more mails into a task:
- Choose the mails you want to copy into the task > right click and drag and drop to the task button.

Add one or more mails to an existing task:
- Choose the mail, press Ctrl+C. Go into task, find the task (search with F3) > open the task > place the cursoren where you want to paste the mail > press Ctrl + V or

- Go into tasks, find the task (search with F3), open it, go to the *Insert* pane > choose *Outlook Item* > pick the folder where the mail is located > choose the mail in the lower window > press *OK*

Recurrence on task:
When you complete a recurring task, it will appear again on the next upcoming deadline

↻ Recurrence

How to setup a task with a recurring deadline: Open a new task > choose *Recurrence* > set the time interval > *Ok*

View your tasks more places in your Outlook

- To the right of your mails
Go to your mail > *View* pane > *To-do-bar* > pick *Calendar* first > *To do bar* again and then pick *Tasks*.

- At the bottom of your calendar (this does not mean that they are visible to others)
Go to your calendar > *View* pane > choose the button *Daily Task List* > pick *Normal.*

- It is also a possibility to view your tasks to the right of your calendar
Go to your calendar > *View* pane > choose the button *Task List* > pick *Normal.*

- And if you right click the top bar "Show tasks on:" in your calendar, you can choose if you want to see completed tasks

Show tasks on: Due Date		
Jesper Sch... 🟨 ✓		By Start Date
Registrer k... 🟪 ✓	✓	By Due Date
OPdater ku... 🟪 ✓	✓	Show Completed Tasks
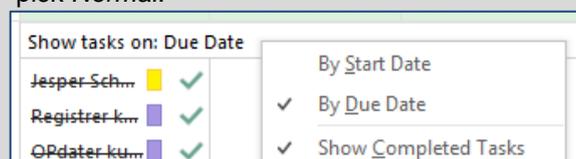
Task overview – give your tasks visual identity
…to make them easier to prioritize:

Use categories, grouping and automatic formatting to get at good overview of your tasks!
See more below and on page 17, common features.

Time
When is the task to be solved?

Importance
How important is this task compared with others?

Size
How much time do I need?

### View your tasks – different views with one click:

The advantage of different views is to have a quick overview of specific tasks or completed tasks.

The good default views that already exist in Outlook are:
- Completed tasks
- Today
- Next 7 days

And you can create your own defined view if you need
- A special view (e.g. more or less columns) or
- one or more filters, to see one type of tasks at a time.
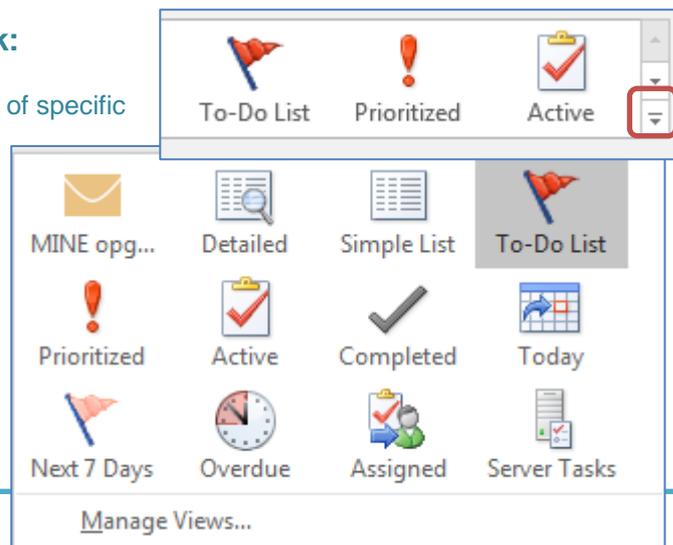
Create your own view:
There are more ways of doing this. The easiest way is to choose a view that already exists and that you use and prefer the setup for (or set it up as you want it). If you need more views you can copy this preferred view to a new one.

To copy a view click the little arrow in the right bottom corner of your Current View menu > Choose *Manage Views* > New window: Mark the view you wish to copy > *Copy* > name your view > *Ok* > new window with many possibilities. The options mentioned above are to be found here:
- *Columns*: Add, delete and define the order of the columns you want.
- *Group by:* Se description right below.
- *Filter:* Filter specific tasks to get an overview of the wanted ones.
- *Other Settings:* Setup whether it should be single line or compact layout.
- *Automatic formatting:* Automatize color and text font changes.

Press *Ok* > *Ok* > *Ok* and your new view will be visible in your Current View window.

Group your tasks
Grouping of tasks can be used as an alternative to the Views above: Grouping gathers your tasks in more overcoming views. The advantage by grouping, instead of using Views, is the possibility to jump between groups, and that you can view more groups at a time. With a grouped view you can open and close (collapse and expand) each group.

A use scenario on how tasks can be viewed when setup in layered groups (pictures):

Sorted by:
1. Completed / not completed
2. Hereafter by client
3. and then by responsible.

How to setup in groups:
Choose the task folder and the view you wish to change the setting for. Go to the *View* pane > *View settings* > *Group by* > New window: Define what you want to group by > *Ok* > *Ok*.

Share your tasks – 5½ different ways of sharing tasks in Outlook

1. Assign tasks – to a colleague (or your self from a shared list).

   - Create a new task > Choose *Assign Task*. Add receiver in the To field, name your task and set an action-date.

   - The receiver needs to Accept the task to add to his or her own *Task list*. Now you (task assigner) cannot edit the task any longer. Task assigner receives an orientation every time the task owner edits the task or completes the task.

   - Task sender is always able to follow the task status in his or her list of shared taks: *Tasks* > *Assigned tasks* in *Current View* window.

2. Share a task folder with a colleage
   - Start by creating a new task folder: Right click the folder *Task* > *New folder* > Name it and press *Ok*. From this folder you can create a new task or drag tasks from other folders into this new folder

   - To share the folder, Right click the new folder > go to *Properties* and *Permissions*. *Add* the colleague you wish to share the folder with and set the permission level you want him/ her to have below > *Ok*.

   - Send a link to the shared folder by right clicking the folder > *Share* and *Share tasks*. Add the wanted email address. Your colleague will now receive an email with the text 'Open this folder' written in the top of the mail. Clicking this text the folder will be visible for him/ her under Other tasks in his/ her tasks folder view.

Get permission to another account, including tasks
This is a strong solution if you have a 'neutral' team account. The benefit of this setup is that the team has permissions to work in the same team task list. Everybody has rights to create, change and delete tasks, or you can setup different permission levels to all depending on individual roles and work processes.

With the right set up, it is possible to assign a task to oneself or to a colleague. It will then be visible to all who the responsible is and the task will be active in the task owner's own task list, and all changes made from here will be visible back in the shared group task list. Once the task is assigned to someone, no one else will be able to change or edit the task, since it is only editable by the task owner (see also description 1).

The alternative solution: It is also possible to setup a 'neutral' account as a personal account on every team member's pc's, so that everybody has full rights to work in the team account as if it was their personal profile. Using this setup, the personal task list will be a mix one's own and the shared tasks. Filters can be used to view only a shared task list, a personal task list, only tasks with a category or a view with only one person responsible, etc. With this setup, everyone has full rights to create, edit and delete tasks.

3. Shared task list using Sharepoint Online (Office365), that you can work with from Outlook
This is the ultimately most elegant and efficient way to share tasks. Create a group (via Outlook) or a teamsite in 365. Create a shared task list and add the relevant members. All members can now syncronise this shared task list with their individual Outlook and work with the shared list under *Other tasks*.

In the shared task list it is possible to create an overview of the shared tasks and who the responsible is. When assigning a task to someone from the shared list the task will appear in the his or her personal task list and can be handled from here, and all changes will synchronize back up into the shared task list.

4. Or use OneNote
A OneNote file can be shared when located on a shared site. In OneNote it is possible to flag own tasks and they will appear in his or her Outlook task list.
It is a great tool for shared meeting minutes, project teams, leaders… 😊

Calendar and contacts

juni 2017

More ways to create a new appointment:

1. Drag and drop an email on the calendar button
2. Use short cut Ctrl+Shift+A
3. Go into your calendar > *New appointment*
4. Write directly in your calendar
5. Or drag a task up into your calendar

Calendar

Add an email to an existing appointment:

- Choose an email > Ctrl+C. Go to *Calendar* and find the relevant appointment (search by using F3) > open the appointment > place the cursor where you want to paste the email > Ctrl+V. Or
- Find your appointment > go to the Insert pane > choose *Outlook item* > find the folder you want to copy the mail from > mark the mail in the window below > *OK*

Set ups and visual overview

- Use "Show as" (Free, Working Elsewhere, Tentative, Busy, Out of office) actively.
- Use categories (colors) to create an overview of the types of activities (this can slo be agreed to on a team basis). See more under Common features. The coloring can also be automated based on e.g. sender or Skype meeting.
- Use the short cut ALT+[number] for the number of days you wish to look ahead. It is a strong planning view.
- Make the tasks visible at the bottom of your calendar (week view) – see more under Tasks.
- Use the Reading Pane, if you often look into appointments – then you don't need to open them.

Planning and cooperation

➢ Don't book meetings directly after one another – give yourselves 10 minutes between meetings.
➢ Mark private appointments with a locker (Private). Then your colleagues only see that you are occupied.
➢ Add transportation time before and after meetings to inform your colleagues about when you can attend a meeting – and when you are reachable by phone ☺
➢ Always answer promptly on meeting invitations (24 hours) and **ALWAYS** send a response to the inviter!
➢ Setup your working hours (e.g. 7-15 or 8-16) so it is visible for colleagues. Go to *File* > *Options* > *Calendar* and set your working hours > *Ok*.

Create calendar groups (people or rooms) > New meeting with all
Collect the people you often invite in a calendar group. With one click you can see all their calendars and with two clicks you can invite them all. And create a calendar group with your favorite meeting rooms, and include them all in the invitation to pick the best ☺
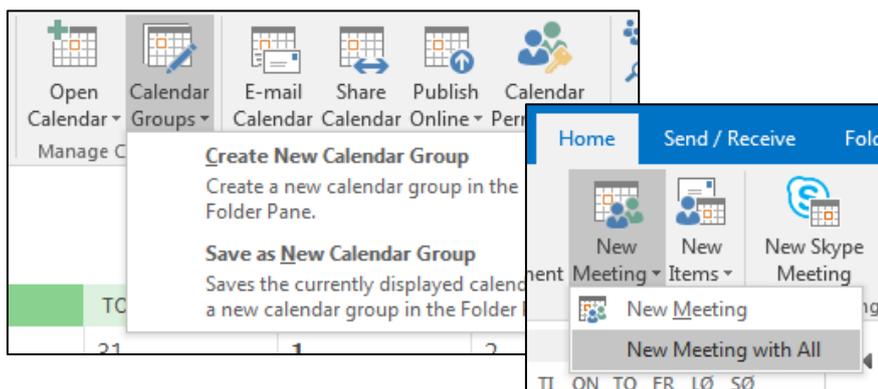
Tip: Do you use the calendar reminder that by default pops up 15 minutes before a meeting?
Consider turning it off and only set it on when you actually need to be reminded!

How to: Go to *File* > *Options* > *Calendar* > remove the tick from *Default reminders*.

Efficient and easy booking of internal meetings with many attendees:
1. Create a meeting with the wanted time duration and add recipients in the To-field.
2. Choose *Scheduling Assistant* to get an overview of everybody's calendars.
3. In the *Room Finder* window to the right, the free dates will show with white coloring.
4. Choose date (white = free, blue = busy).
5. Pick the time of the day from the suggestions below in the Room Finder pane.
6. Invite ALL meeting rooms and choose your favorite free room right above.

2 tips: When inviting many people, it is possible not to receive acceptances and declines. Choose this setting before sending the invitation. It is also possible automatically to move acceptances into a specific folder using rules (and still receive declines).

Room Finder

◄ september 2017 ►

ma	ti	on	to	fr	lø	sø
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

☐ Good   ☐ Fair   ☐ Poor

Choose an available room:

None
Kontoret
Lokale 3
Lokale 2
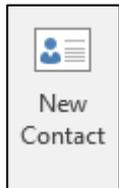Lokale 1

Suggested times:

08:00 - 15:00
4 available rooms

08:30 - 15:30
4 available rooms

Contacts

Ways to create a new contact:

New Contact

1. Drag an email to the People button and drop
2. Use short cut Ctrl + Shift + C
3. Go into People and press *New contact*

People

Create a new distribution list / contact group:

New Contact Group

1. Go to People and press New Contact Group.
2. Name your distribution something that can easily be remembered, as this name is the one you'll write in the to-field when sending to all.
3. New window: Press Add members and choose whether you want to pick from the company list, your own contact list – or simply write in a new email address.

- It is easy to add or remove members in your Contact groups.
- The first time you send an email to your Contact Group you need to find the name in your contact list, and afterwards Outlook will automatically remember the name, as with other emails.

Attach a mail, a document or just write your own notes into a contact:

When you open a new contact, there is a text box to the right. Both mails and documents can be copied into this text box or you can use it to write notes for yourself regarding this person.

- Copy a mail into a contact: Mark the email, copy with Ctrl + C. Find the contact (search with F3), open it, place the cursor in the text field where you want to place the email and paste with Ctrl + V.

Which view suits you best?

- People (vises som en liste i kompaktform)
- Business Card (navn mail, telefon og adresse)
- Card (her ses lidt af al tekst)
- Phone (kolonnevisning med telefonfelter)
- List (kolonnevisning med diverse kolonner)
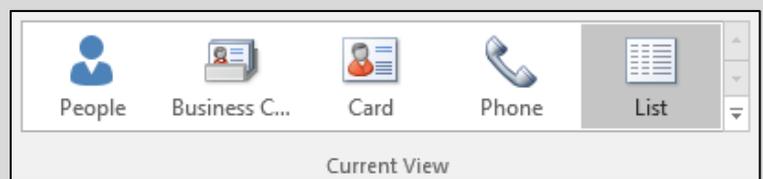
Different views quickly give you different types of overview. Unless you are an advanced user of contacts just choose one view, set up as you like. We recommend List View, and that you remove the columns you don't need, to make it an optimal view (just drag away the columns you don't want).

Categorizing contacts

It is possible to group your contacts in categories – see more about how to under Common functions.

Suggestions to categories could be clients, suppliers, network and private contacts.

Two advantages by grouping contacts in categories:
1. It gives a better overview when looking in your contact list.
2. It is easy to send an email to all people grouped in one category – and a little more about that here:

An alternative to the distribution list/ the Contact Group:

This functionality is an alternative to the distribution list; and especially an advantage if you often need to add or remove members.

It is extremely easy to drag a member in or out of a category (simply drag and drop), or into another category, or into no category.

Another advantage is that a person can be added to more categories, and be a member of several groups.

Looking at a contact person, you can then also easily see which groups he or she is a member of.

How to send an email to people in the same category group:

First sort you Contacts by category > now mark the category heading on the group you wish to send the email to > Press the *Mail* button > Pop Up: Informs you that you are about to create an email with all members of this category > Press *Ok* > a new email will open, including all the email addresses.

Common features

Search – don't look

Search Mail:
When searching for emails in the inbox your Outlook will search both the inbox AND all your subfolders (apart from deleted post). When searching in a subfolder, Outlook only searches here.
- It's easy to change the search area by using the buttons in the search pane, or the little drop down menu next to the search field. Or change the standard setting: *File > Options > Search >* pick your choice *> Ok*

Search Tasks, Contacts and Calender:
In tasks, calendar and contacts, the search function work exactly the same way as in Mail:
- Search tasks: Go to tasks > Activate your search field and write your search word.
- Search calendar: Go to your calendar > Activate your search field and write your search word.

This is how you should search:
- Enter your Search Field
- Use help search words (see page 22) to narrow your search right away.
- Use the search pane (it shows once you enter the search field) to specify your search: e.g. From and write the name of the sender.
- Setup your advanced search fields by adding the fields From, Subject, Body, Attachment, Attachment contains uing the +more or Add more options button and pick the default buttons you want to use.

NB! The Search Field is developing these days, and can look something like these examples:
The newer versions sadly need an extra click on the drop down arrow to the right to show the advanced fields
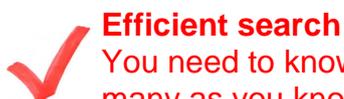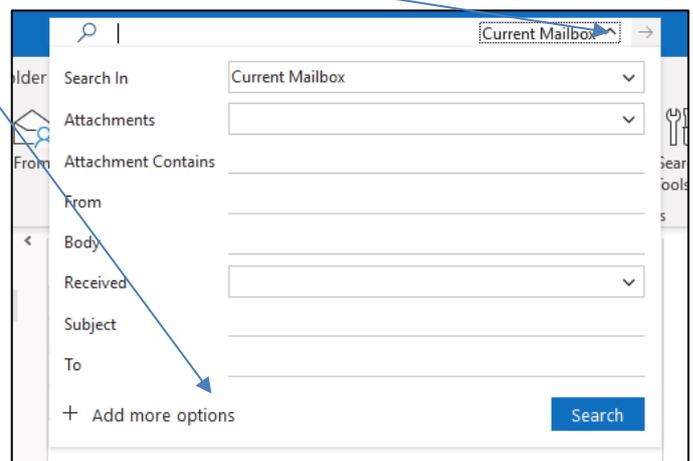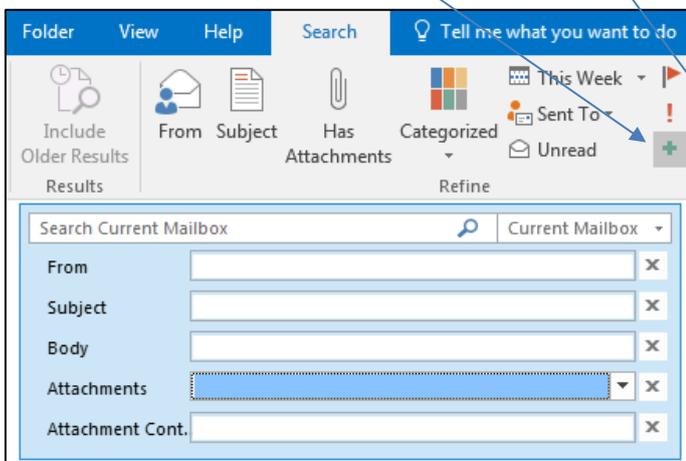
✔ Efficient search
You need to know your search criteria. Start with the criteria you are certain of, and add as many as you know to narrow your search.
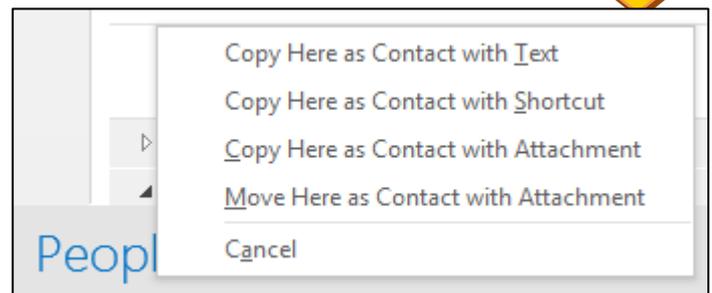Use the helping search words – see them on page 22.

☺ **Drag and drop elements everywhere in Outlook**

Mails from the Inbox:
Drag and drop an email down to one of the bottom buttons (calendar, people, tasks, notes) to convert (copy) it.

- ➢ Right click (hold it!) > drag and drop > a menu appears with different possibilities, e.g. > to task:
- ➢ Left click > drag and drop > only the mail text is copied over (NB! No attachments).

| Copy Here as Contact with Text |
| Copy Here as Contact with Shortcut |
| Copy Here as Contact with Attachment |
| Move Here as Contact with Attachment |
| Cancel |

Peopl

Drag and drop a mail down on to…

People	**Calendar**
Create a new contact by dragging an email from the wanted sender down on the contact button > now you can drag the relevant info from the signature to the correct fields.	Right or left click an email and drag and drop it on the calendar button > New appointment with the mail text (left click) or with the mail attached (right click).
Notes	**Tasks**
Create a new contact by dragging an email with the wanted text down on to the notes button > Adjust the size of the note and edit the text if needed. The top text is the heading. Close on the X in the right top corner.	Right or left click an email and drag and drop it on the tasks button > New task with the mail text (left click) or with the mail attached (right click). Then you don't have to search for the mail when solving the task, or replying on the email.

Drag and drop from calendar (week view) with daily task list visible at the bottom:
Drag and drop a task from the task list up to the calendar, or from the calendar down to the task list:

- ➢ Book time in the calendar for task solving – also more times, if needed.
- ➢ Create a task based on an appointment, if you need to e.g. prepare something before a meeting.

Drag and drop from a contact from People
- ➢ To the mail button, to send him or her an email (new email).
- ➢ To the calendar button, to invite him or her for a meeting (new appointment).
- ➢ To the task field, to send (assign) him or her a task (new task).

Automatizing *possibilities*
- categorizing, standard texts and conditional formatting:

Categorizing: Add a color to your elements to make them differ out
The categories are the same everywhere in Outlook. You can choose only to use them for emails,
for appointments, for tasks and/ or create some that can be used everywhere, e.g. Important or Client.
You can create as many as you like, but only 15 are visible with the first click.

Advantages:
- ✓ The color makes the mail/ contact/ appointment/ task stand out.
- ✓ It is possible to sort by category – especially useful in mails, tasks, people and notes.
- ✓ Categories are good search criteria – and useful all over Outlook.
- ✓ In Mail you can create a category search folder.
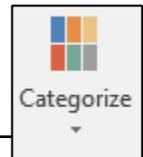
In Mail, Calendar, People, Tasks and Notes:
- Right click the email/ appointment/ contact/ task/ note > Choose *Categorize* and mark the wanted category.

- Mark the email/ appointment/ contact/ task/ note > Choose *Categorize* and add the wanted category.

Extra advantages in Mail:
- Set up a quick step to categorize the marked email with the category you often use (see how under Mail handling).

- Set your **quick click** to be your favorite category. If your Mail is setup in a column view, then with one click in the category column, you can add your favorite category to the email. See how to set up a column view on .

How to change category names and colors:
Press the button *Categorize* and go down to *All categories* in the bottom of the drop down menu. New window: Now mark the category name (don't tick it) > press *Rename* to the right > and also change color to the right. You can also create new ones and delete the ones you don't use any more.

How to set your Quick Click:
Press the button *Categorize* and go down to *Set Quick Click* in the bottom of the menu. New window: Pick your favorite category > *Ok*.

Use standard texts (Quick Part og AutoText):
Paste the standard texts that you write several times into your Quick Parts…

Advantages:
- ✓ Use quick parts for mails often sent with the same text bites.
- ✓ Use standard text as a frame for your meeting invitations to ensure you have a heading, an agenda, etc.
- ✓ Or use it in tasks if you want the information to be equally located and ensure you fill out what you need.

Create a Quick Part:
- ➢ Open a new mail/ task/ appointment and write
- ➢ Mark the text
- ➢ Go to the *Insert* pane > Choose *Quick Parts* >
- ➢ Pick *Save selection in quick part gallery* >
- ➢ Name it something saying and press *OK*

Use one of your Quick Parts:
Open a new mail, task, appointment
Place the cursor in the text field
Go to the *Insert* pane > Choose *Quick Parts*
Select the wanted text from the gallery.

OR do as described above, just place it under **Auto Text** instead. Then you can just write the name of your Auto Text and press *Enter*, then the text will appear.
A tip: Name your Auto Text with a * before the name. Then you won't ever write the name by mistake 😊

Automatic formatting – automatic change of color and -size.

Very useful in both Mail, Calendar, Tasks and Contacts.

Outlook can automatically change the look of your email, your appointment, or your task, based on specific criteria.

The advantage is that you automatically have a better overview.
- ✓ The automatic coloring ensures that the element stands out without you having to do anything.
- ✓ The automatic change of font size makes it obvious where to put your focus.

Possibilities in Mail:
- Your email can automatically change color when for instance
  - o You give an email a category (could be important, for example).
  - o If you are only Cc-receiver of the email.
  - o The email is from your boss or an important client.
  - o It says something specific in the subject line or in the mail body.
  - o The mail is older than one week, one month, or you set a time limit.

Possibilities in Calendar:
- Your appointment automatically changes color, when for example:
  - o It is an internal meeting (the criteria could be that your meeting rooms are in the location field, or that the meeting inviter is an internal email).
  - o It is a Skype meeting.
  - o It is a recurring meeting, e.g. department meetings, board meetings, management meetings…
  - o There is a locker on it = marked Private.
  - o It is an appointment created from a task, dragged up from the task list (= task solving time, not a meeting).

Possibilities in Tasks:
- Your tasks automatically change color and/ or font size if, for example:
  - o You get closer to task deadline.
  - o You add a category to the task, e.g. important, big task, project X.
  - o It is a mail you have flagged because you want to follow up on it.
  - o It says something specific in the subject.
  - o It is a task flagged in your OneNote.

You need to decide on one or more criteria that define the color or font size change.
It should support you in prioritizing and helping to give you an overview.
Therefore, don't create too many.

How to setup the automatic color and font size change:
Go to either mail, calendar, tasks or people, depending on where you want to set it up. Go to the *View* pane > Choose *View Settings* > New window: Choose *Conditional formatting* > Choose *Add* to the right > name it so you know what it's about (e.g. "Cc") > Choose *Font size* > set the size if you want it bigger and/ or change the color (the *color* button just below) > *OK* > now choose *Condition* > New window: and here you have plenty of possibilities depending on what the criteria is. The ones mentioned above:
- A specific sender, Cc-mails, received date or specific words are all setup on the first pane.
- A specific category is setup under *More choices* pane.
- The rest are to be setup in the *Advanced* pane > press *Field* > Choose the type of field you are searching for (post, task, calendar) and find the field from the list. Now set the condition and define the value that needs to be fulfilled > *Ok* > *Ok* > *Ok*, and the change should be visible.

Setup – columns, reading pane, compact layout

It has a big impact HOW you view your data to keep a good overview. And that is both in mails, in the calendar, in contacts, in tasks and in notes. Some setups are a matter of taste. Others are about what is most efficient and what we need. No matter what the reason is, we often have very different needs and taste; so here we will show you how to set it up and what to consider.

> **Setup a reading pane:**
> Go to the *View* pane, > Pick the Reading Pane button and choose whether it should be to the right or at the bottom of your window.

Columns

This can be used in all parts of Outlook, apart from the calendar, and if you use compact layout in Mail (view next page).

Definér for dig selv, hvilke informationer har du brug for at se.

Useful columns are:
- In mail: Icon, Sender, Subject, Received date, Category, Free text field, Attachment, Flag
- In contacts: Full name, Job title, Address, Business Phone, Mobile phone, Email, Category
- In tasks: Icon, Subject, Responsible, Deadline, Folder, Category, Reminder icon, Flag
- In notes: Icon, Subject, Category

Remove the columns you don't use. Just drag the column away and drop it.

Add column headings in two different ways:

1. Go to the View pane > View Settings > Columns > **New window**: Add them from left to right, or remove them from right to left. Use the arrow buttons in the middle. And define the order of your final column headings.

2. Or right click any column heading and choose *Field Chooser* > Find the wanted heading (you can change types in top drop down menu) > Now mark the wanted heading and drag it up into the header bar and drop it where you want it to be. You can also move around the order of the columns by simply dragging them.
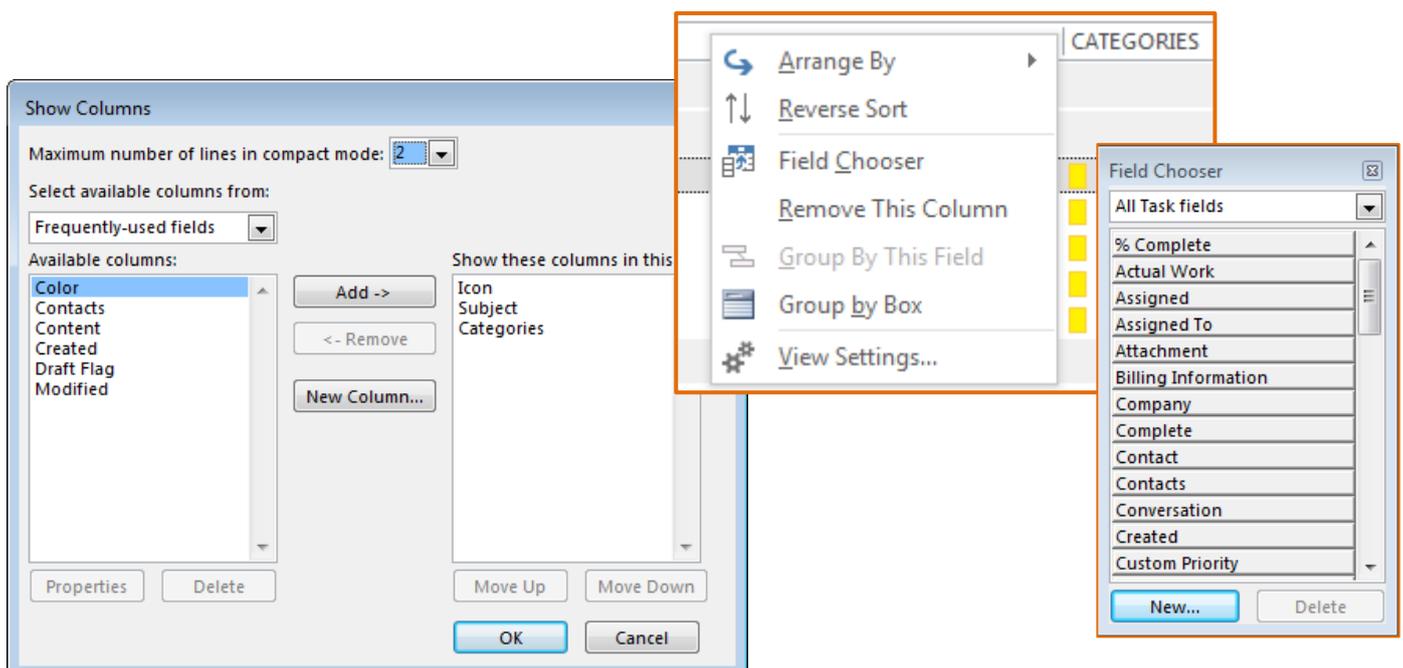
Reading Pane

The reading pane gives to the possibility to look into the element – no matter which – so you don't have to open it and close it again.

This saves time!

The reading pane can be used all over Outlook, but is most useful in mail, tasks and notes. Some use it in their calendar as well (best if you don't use to have many open calendars that takes up all the screen space) to see what the meeting is about.
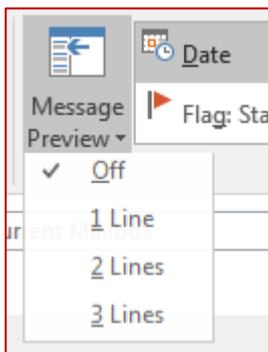
Compact layout
You can choose to see your mails, and your tasks (also the To-do-bar in the right side of the mail) in compact layout or in columns. It's both a matter of taste and efficiency. 3 advantages with column setup:

1. Use Quick Click to add a category to a mail, task, contact or note in the category column.
2. Very easy to sort your items differently by clicking the column heading (e.g. sender, date, category, deadline, etc.).
3. In the task list you'll get a very easy option to change the deadline date, when you click it from a drop down calendar.

Change to column layout
Drag the vertical lines to make your field wider. Then the columns will appear, but they disappear again once you replace the vertical line.

How to setup a permanent compact layout:
For a permanent setup, go the *View* pane (NB! In the to-do-bare this is not an option; here you have to right click in the column heading) > *View settings* > *Other settings* > remove the tick from "Use compact layout in widths smaller than 125 characters" and make sure the "Always use single-line layout" is ticked > *Ok* > *Ok*.

Compact layout in Mail
In your mail setting, you can choose how many lines you want to see, if you use compact layout. *View* pane > *Message preview* and choose number of lines.

3 final cool tips

1. Use **help search words** to nuance your search – see .

2. Use **short cut keys** for the functions you often use – see .

3. Add **the buttons you often use** up into the *Quick Access Toolbar* menu. If you e.g. use standard texts a lot, then right click your Quick Part button and choose Add to Quick Access Toolbar. Then you will have access to your texts with only one click from an open mail – or use the short cut to your quick access toolbar: ALT+[number].

Short cut key list

Handling	Opgave	Genvejstast
Create new	Appointment	CTRL+SKIFT+T
	Contact person	CTRL+SKIFT+C
	Folder	CTRL+SKIFT+E
	Meeting invitation	CTRL+SKIFT+Q
	Mail	CTRL+SKIFT+M
	Mail (from Mail-window)	CTRL+N
	Note	CTRL+SKIFT+N
	Task	CTRL+SKIFT+K
Email	Go to inbox	CTRL+SKIFT+I
	Send	CTRL+ENTER
	Reply mail	CTRL+R
	Reply to all	CTRL+SKIFT+R
	Reply all with a meeting invitation	Ctrl+Alt+R
	Forward an email	CTRL+F
	Send and receive mails (update all folders)	CTRL+M or F9
	Flag mail	INS
	Mark mail as read	CTRL+Q
	Mark mail as unread	CTRL+U
	Forward as an attachment	CTRL+F
Calendar	Show more days in the calendar (week view)	ALT+number of days (0 to 10)
	Go to specific date	CTRL+G
	Shift between calendar views	CTRL+ALT+1 to 4
	Go to next day	Right arrow
	Go 4 weeks back or forth	ALT+ARROW UP or ARROW DOWN
	Go 1 week back	ALT+HOME
	Go to the end of the week	ALT+END
Tasks	Show or hide the to do bar	ALT+F2
	Accept a task request	ALT+C
	Decline a task request	ALT+A
	Forward a task as an attachment	CTRL+F
	Create a task assignment	Ctrl+Skift+Alt+U
	Mark complete	INS
Contacts	Mark all	CTRL+A
	Send a mail to the marked contact	CTRL+F
	Open the contact list	CTRL+SKIFT+A
	Send a contact card	CTRL+SKIFT+F
Other	Save (exept tasks)	CTRL+S or SKIFT+F12
	Save and close (exept mail)	ALT+S
	Save as (only mails)	F12
	Regret	CTRL+Z
	Delete	CTRL+D
	Print	CTRL+P
	Move	CTRL+SKIFT+V
	Mark for follow up	CTRL+SKIFT+G
	Go to previous	ALT + ARROW LEFT
	Search function	F3

Help search words

Write this	To find this
bobby	Items containing *bobby*. Both big and small letters will do.
bobby moore	Items containing both *bobby* and *moore*, but not necessarily in that order.
bobby AND moore	Items containing both *bobby* and *moore*, but not necessarily in that order.
bobby NOT moore	Items containing *bobby*, but not *moore*.
bobby OR moore	Items containing *bobby*, *moore*, or both.
"bobby moore"	Items containing the exact phrase *bobby moore*.
from:"bobby moore"	Items sent from *bobby moore*.
from:"bobby moore" about:"status report"	Items sent from *bobby moore* where *status report* appears in the subject line, body, and attachment contents.
hasattachment:yes	Items that have attachments.
attachments:presentation.pptx	Items that have attachments named *presentation.pptx* or if the attachment contains *presentation.pptx* within its contents.
subject:"bobby moore"	Items whose subject contains the phrase *bobby moore*.
subject:bobby moore	Items with *bobby* in the subject line and with *moore* anywhere else in the document.
cc:"bobby more"	Items in which the display name *bobby moore* is on the Cc line.
cc:bobbymoore@contoso.com	Items in which the email address *bobbymoore@contoso.com* is on the Cc line.
bcc:bobby	Items in which *bobby* is on the Bcc line.
received:=1/1/2006	Items that arrived on 1/1/2006.
received:yesterday	Items that arrived yesterday. You can also use *today, tomorrow, yesterday* or *this week, next month, last week, past month, coming year*. Or days *Sunday, Monday … Saturday* and months: *January, February … December*
received:last week	Items that arrived last week.
received:>=10/1/06 AND received:<=10/5/06	Items that arrived between 10/1/06 and 10/5/06.
received:>10/1/06 AND received:<10/5/06	Items that arrived after 10/1/06 but before 10/5/06.
sent: yesterday	Items that you sent yesterday.
to:bobby	Items that you sent to *bobby* when you are searching in the **Sent Items** folder.
read:no	Items that have not been read.
subject:status received:May	Items received from anyone during the month of May (any year) where the subject contains *status*.
startdate:next week subject:status	Calendar items next week where the subject contains *status*.
is:recurring	Calendar items that are recurring.
organizer:bobby	Calendar items where *bobby* is the organizer.
category:business	Items that are categorized as *business*.
received:=1/1/2006	Items that arrived on 1/1/2006.
received:yesterday	Items that arrived yesterday. You can also use *today, tomorrow, yesterday* or *this week, next month, last week, past month, coming year*. Or days *Sunday, Monday … Saturday* and months: *January, February … December*