THE FLORIDA STATE UNIVERSITY
INFORMATION TECHNOLOGY SERVICES

Outlook 2010 Tips 'n Tricks

General Outlook Tips

1. Display Outlook Today

- 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

- File | Options | Advanced | "Start Outlook in this folder:" | Browse to desired folder
- Select the top-level email account address if you wish to open Outlook to the Outlook Today view

3. Change Navigation Pane Options

- 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.)
- Journal is "Off" by default

4. Check out the other Outlook components you may not be familiar with: Tasks, Notes, and Journal

- Tasks – a digital Task List and/or To Do List that integrates well with Outlook and OneNote!
- Notes – Digital "post-it notes"
- Journal – Automatically track and/or time spent on specific digital activities

5. Change the default Address Book location(s)

- On the Home tab from any Outlook screen | select Address Book
- Select Tools | Options
- Select the desired order to check address lists when sending e-mail
- Select the desired address list to show first when opening the address book

6. Searching the Address Book

- Select the "Name Only" option (if necessary), enter the first few letters of the **Last Name** in the Search: box – DO NOT press Enter!
- Double-click the correct name, OR
- 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)

- 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

- Appears above the Ribbon by default – click the down-pointing triangle next to the Quick Access Tool bar | select Show Below Ribbon
- Right-click any tool in the Ribbon | select Add to Quick Access Toolbar
- See File | Options | Quick Access Toolbar for more customization options

9. Send/Receive All Folders – to check for new Mail or new Calendar entries

- Keyboard Shortcut = F9
- Click Send/Receive All button on Quick Access Toolbar, OR
- Click the Send/Receive tab | Send/Receive All Folders

10. Create Local Folders (offline storage)

- 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

- File | Options | Customize Ribbon
- Click a tab | New Group |Rename | Click on the group | select a command | Add, OR
- Click New Tab | Rename | click the New Group | Rename | select a command | Add

Outlook E-mail Tips

1. Color code your Inbox

- Click the View tab | View Settings | Conditional Formatting | Add | enter a Name:
- Click the added option in the "Rules for this view:" list
- Click Condition . . ., then choose the appropriate condition(s) to format selected messages automatically | OK
- 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

- Click on each date grouping to collapse or expand individual groups, OR
- Click the View tab | Expand/Collapse | select desired option

3. Change Mailbox Grouping

- Click the View tab | View Settings | Group By. . .
- 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

- 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!

- Click the View tab | check Show as Conversations | This Folder
- Click a white triangle to the left of each conversation to expand it
- Click a message in the conversation to see lines indicating which message is being replied to
- Uncheck Show as Conversations | This Folder to return to the normal view

6. Ignore Messages in Conversations – stop receiving future messages with this topic!

- Select a message | click the Home tab | Ignore | Ignore Conversation
- 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

- Click the Home tab | Clean Up | Clean Up Conversation/Clean Up Folder /Clean Up Folder & Subfolders
- 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

- Open the application(s)/screen(s) you want to capture into another window
- Click the Home tab | New E-mail
- In the new message window, click the Insert tab | click in the message body | click Screenshot | click on the desired window to capture, OR
- 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

- An appointment automatically becomes a meeting when you Invite Attendees

2. Quick Appointments

- 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

- Click on the Start Date/Time in the Calendar and drag through the End Date/Time to select that time block
- 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

- Click the View tab | Time Scale – to select desired time intervals (60 min., 30 min., 15 min., etc.)
- Click the View tab | Overlay to lay a calendar on top of another calendar
- Click the View tab | Daily Task List to display Tasks below the personal calendar
- Click the View tab | Color to select different colors for each calendar you open
- 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!)\

- 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
- Press ALT + 0 – 9 (0=10 days, 5=5days, etc.) for the number of consecutive days to display
- Click on Day, Work Week, or Week to return to the normal view

6. To view non-consecutive days "Side by Side"

- Click the first date in the Date Navigator (at the top of the Navigation Pane or the To Do Bar)
- 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!

- Meetings created with "Recurrence" selected will all have the same Location and the same Time scheduled for all meetings in the series
- Create the first instance of the meeting – **DO NOT** select "Recurrence"
- Select the meeting in the Calendar (click on it)
- Copy the meeting (Ctrl+C)
- Navigate to the next date/time in the series, click in the Calendar where you want to schedule the meeting and Paste (Ctrl+V)
- See Tip #3b above to display non-consecutive dates side by side for easier copy/paste operations
- 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)

- Locate the Date Navigator at the top of the Navigation Pane or the To Do Bar
- Click and hold down the left mouse button on the current Month displayed
- 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
- 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

- In Mail, click a message to select it
- Click the Home tab | OneNote | select a Notebook and/or Notebook Section to store the message in | OK
- 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)

- In Calendar, click a meeting to select it
- 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
- Once the linked Meeting Notes page is created in One Note, enter any notes you need
- To **open** the linked OneNote notes **from Outlook**:
    - In Outlook, click the meeting in Calendar | click the Home tab | OneNote
- To **open** the linked Meeting in Outlook Calendar **from OneNote**:
    - 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)
    - 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

- Open or create a note in OneNote
- Place the cursor in the note where you wish to add an Outlook "Flag"
- Click the Home tab | Outlook Tasks | select a date flag
- 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

- Locate the flagged note in the appropriate notebook (use the Search tool, if necessary)
- Right-click on the Flag symbol in the note | select "Open Task in Outlook", OR
- 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)

- Position the cursor in a OneNote note page
- 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:

- **Tips may not all apply directly to Outlook 2011 for Mac –** 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.
- **Tips DO NOT apply to Outlook 2008 or Entourage for the Mac.**