SOS No. 8 Microsoft Office* Outlook [2010]

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SOS Series
(Support for Office Staff)

Office of
Medical Student Education

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Learning Objectives

This Guide addresses features or functionality of Microsoft Office Outlook 2010 to:

- Create and manage filters for emails
- Use Advanced Search functions
- Track productivity with the Journal Toolset
- Create Task Lists & Reminders
- Manage contacts
Create and manage filters for emails

Select an email that you would like to filter so it is sent directly to a folder in your inbox. Click on “Rules” in menu bar.
Select “Create Rule”
Select HOW you want the email to be filtered

If you are creating a NEW folder, then click the box to the left of “Move the item to folder” and “Select Folder”
Create the new folder

Choose a folder or Create one by clicking New

Type the new folder name, Click OK
Where to find your newly filtered emails

• After that, all emails that come in to your inbox from the email designated, or with the subject heading identified (or however you filtered the email) will be placed automatically into the folder you created.

• In the example on previous slides, the emails from announce@ahsc.arizona.edu will be placed into a folder called “AHSC Announcements”.

• You will not see these in your inbox.

• You will need to remember to check your folders for email.

• When folders contain new emails the name of the folder is in bold font and the number of emails appears in parentheses (usually in blue font).
Advanced Search functions

- Select WHERE you want to search.
- The Search Tools Menu enables you to select CURRENT folder
- ALL Subfolders, ALL Outlook Items, All Mail items
- It also enables you to search only for emails with attachments or without; by date; to whom sent; whether it is unread or read, whether you have previously flagged it as important or at all, by category and from whom you received it!
Search by typing a keyword in the search box above your emails in the inbox.
Search by Keywords

AHSC subject:(keywords)

Your search returned a large number of results. Narrow your search, or click here to view all results.

Arrange By: Date

Today
- announce@ahsc.arizona.edu
  AHSC Announcements - Apr 27, 2015
  8:06 AM
- announce@ahsc.arizona.edu
  AHSC Announcements - Apr 27, 2015
  8:06 AM

Last Week
- announce@ahsc.arizona.edu
  AHSC Announcements - Apr 24, 2015
  7:03 AM
- announce@ahsc.arizona.edu
  AHSC Announcements - Apr 24, 2015
  7:03 AM
- announce@ahsc.arizona.edu
  AHSC Career Development Award
  7:03 AM
- announce@ahsc.arizona.edu
  AHSC Announcements - Apr 23, 2015
  7:03 AM
- announce@ahsc.arizona.edu
  AHSC Announcements - Apr 22, 2015
  7:03 AM
Advanced Search Tools in one dialogue box can be accessed by clicking on Search Tools on the Search Menu.
How to Start the Journal Function

• Go to the list of folders at the bottom left of your Outlook window
• Click on the upside down triangle at lower right of this region of the window
• On the menu that pops up, click on “Add or Remove Buttons”
Once you turn on the Journal...

Click Journal

1. It will then appear in your FOLDER list

2. (The Outlook Folder list is NOT your EMAIL folder list; it appears below your EMAIL folders.)
When you set up the Journal for the first time, Outlook will open a dialogue box that asks you to select the programs or Outlook features you would like to document in your journal (e.g., Microsoft Office Excel, Appointments, etc.).

These will be logged AUTOMATICALLY in your Journal.

Then you may sort by any column, e.g., entry type (program or manually created category), date created, date modified, subject, or category.
Journal Entries as a Timeline

Select Timeline view and then choose time period (day, week or month)
Journal Entries are sorted by...

- Date;
- MS Office Program; and
- Manually created entries (e.g., phone calls)
Filter by Microsoft Office Program

- Excel
- PowerPoint
- Visio
- Word
Search Journal Entries
Manually Create Journal Entries

- To create entries for events, such as phone calls, click on the green icon at left on the JOURNAL menu.
- A new entry window will pop up. Type the subject of the entry, then add contact names or type in a summary of the event.
- If you want to time a phone call and make notes during your phone conference, you may use this entry dialogue window to do so.
- Click “Start Timer” on the new entry menu.

You may also categorize journal entries, using the same categories you use for appointments and emails or reminders, or create new categories.
When you’re done with the phone conference or other event…

Click Pause Timer

Adding to the Entry

• When you’re done with the event, click “Pause Timer”
• Make any additional notes you need to, then click “Save & Close”
• The Journal will reflect your phone call 📞.
• Create tasks and reminders from emails
• Create tasks and reminders separately
• Categorize tasks by importance, category or date
• View by priority of importance (low, normal, high), date (most recent, oldest) and category.
• Categories for tasks will be shown in the Task List
• View by category, date, priority
• Create new categories
Managing contacts

- Categorize contacts
- Create contact groups
Categorize Contacts

- These are the choices on the Contacts Menu in Microsoft Office Outlook.
- Select a VIEW, such as “Business cards” or “List”.
Categorize Contacts

Select a Contact
For example, “Oscar Legrouche”

Click the Categories icon
Create new category for contacts

Select or Create a Category

Color Categories

To assign Color Categories to the currently selected items, use the check box next to each category. To edit a category, select the category name and use the buttons to the right.

Name

- Societies
- SOS Program
- STUDENT AFFAIRS
- TCMS
- TEACHING
- Teaching Scholars Program
- T-EPC/EPC
- Time
- TWT Series or activity
- Video Conference
- WGEA
- Preclinical

Buttons:
- New...
- Rename
- Delete
- Color:
- Shortcut Key:
  - (None)
Now the contact reflects the new category

- Full Name: Oscar Legrouche
- Company: 
- Job title: Course Director
- File as: Legrouche, Oscar
- E-mail: Oscarlegrouche@email.edu
- Display as: Oscar Legrouche (Oscarlegrouche@email.edu)
- Web page address: 
- IM address: 
- Phone numbers: 
  - Business: (555) 555-5555
  - Home: 

Notes
Committee Member
Create Contact Groups

- ADD MEMBERS to a group of contacts from Outlook Contacts, Address Book or add new email contact.
- You may categorize your contact groups.

- If you choose OUTLOOK CONTACTS, then you will choose from your own contacts or SUGGESTED CONTACTS – emails on the public server for the organization to which you belong.
Once you have a Contact Group

How Contact Groups Work

- A business card or other entry will appear in your contacts with the name of the group
- To view the members of the group, double click on the contact card
- Send emails to the entire group by clicking on E-mail or Set up a meeting for the group by clicking on Meeting.
How to use the group contact

Click send when ready

If you want to send to only part of the group…

- Click the + sign to the left of the name of the group (left, middle image).
- You will see the “Expand List” dialogue box (bottom left image).
- The individual emails for each member will appear in the TO entry box, instead of the group name. Emails will be sent to each member individually. Or, you may remove members who should not be receiving this particular email.
THANK YOU!

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