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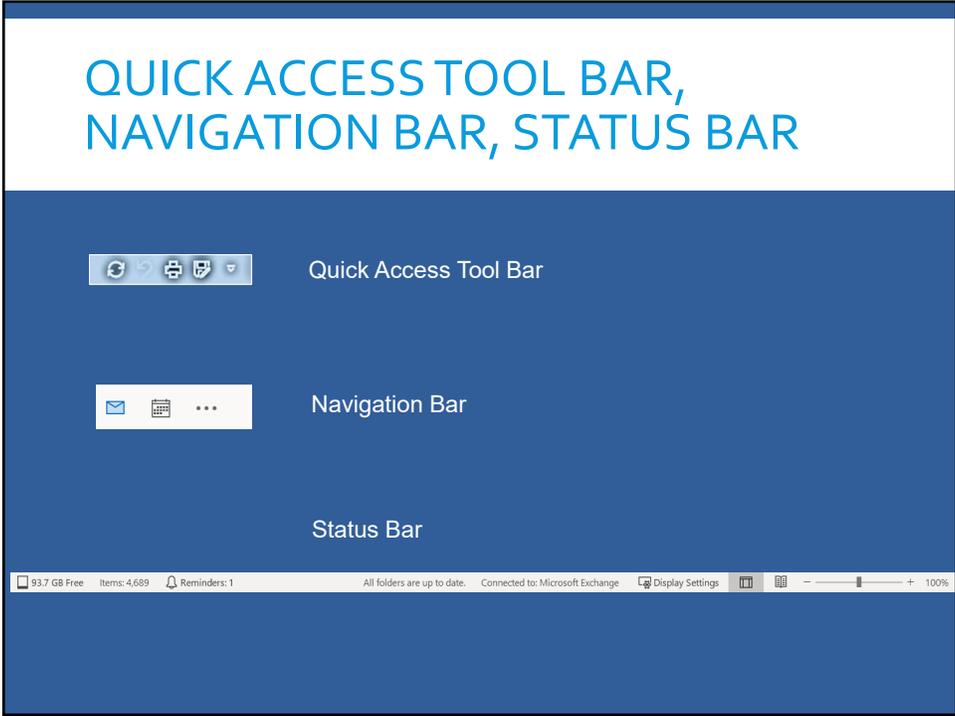
COURSE OUTLINE

In this course, you'll learn some tips to...

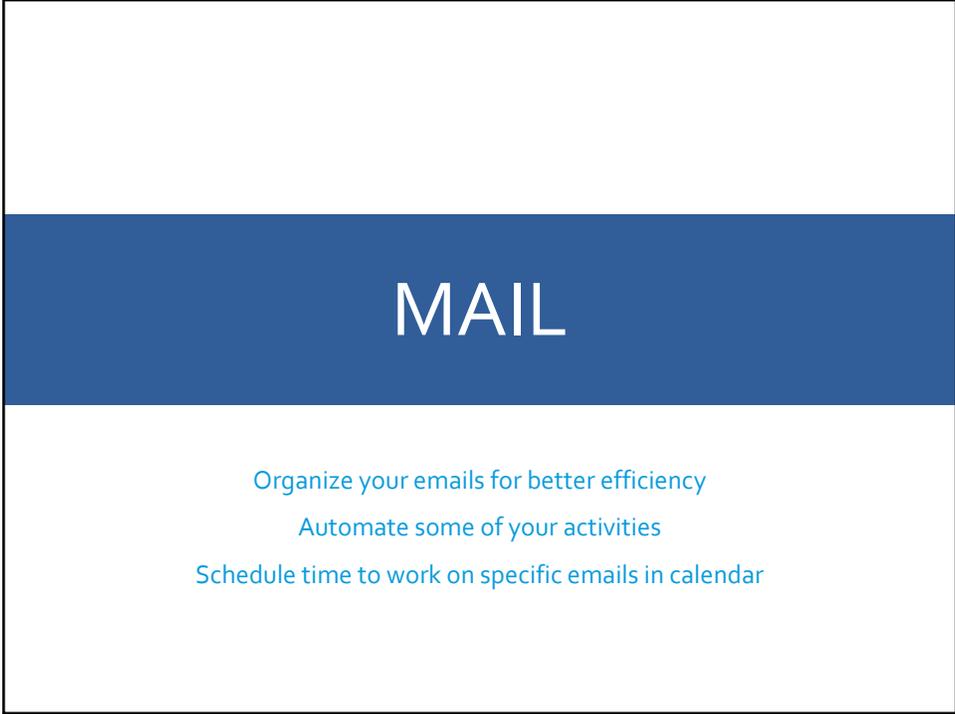
- Organize your emails for better efficiency
- Schedule your time in calendar
- Prioritize & automate some of your activities

And some tricks!

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TAKE CONTROL OF YOUR INBOX

- I. Apply a decision-making model to manage your mailbox
- II. Setup Views to work through volumes of email
- III. Setup a simple and effective folder system
- IV. Assign useful categories with colors to organize emails
- V. Automate your most repetitive tasks



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I. Apply a Decision-Making Model to Manage Your Mailbox

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DEVELOP A SUITABLE APPROACH



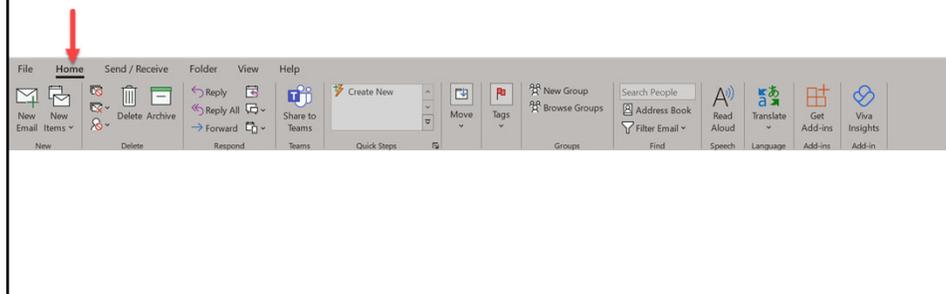
Decide what to do with each message as soon as it arrives, to gain more control and improve response time.

- Schedule a dedicated time for processing emails
 - Morning 1 hr, midday ½ hr and end of day 1 hr
- Read it once and act on it
 - If you cannot delete or take care of it in less than 2 minutes, then place it in an Action folder with appropriate categories (Do/Delegate/Defer)
 - Transform the email into a contact, an appointment in your calendar, or a task by dragging it to the icon in the navigation bar
 - Reply with a meeting | Reply with an instant message (Teams chat) | Forward as an attachment

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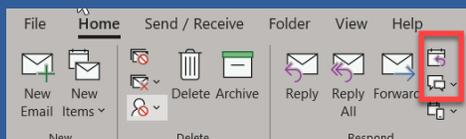


HOME RIBBON



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Home > Respond



- Reply with meeting
- Reply to this item with an instant message (Teams chat)

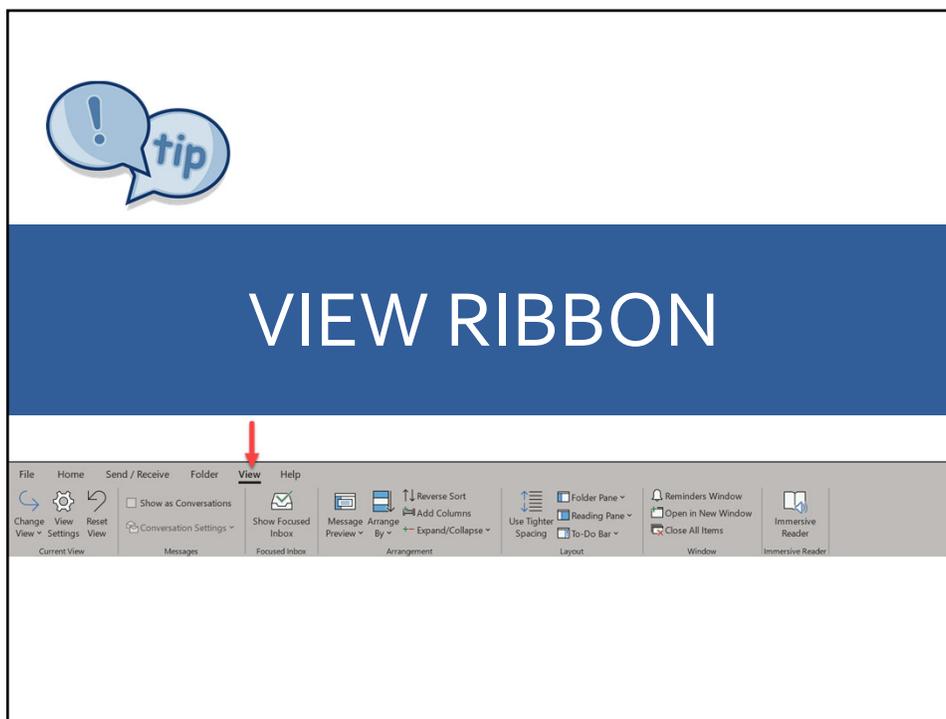


- Forward as attachment

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II. Setup Views to Work Through Volumes of Email

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A. View > View Settings Create, Change, Or Customize

The image shows the Outlook ribbon with the 'View' tab selected. The 'View Settings' option is highlighted. To the right, the 'Other Settings' dialog box is open, showing options for Column Font, Row Font, Grid Lines and Group Headings, Message Preview, Reading Pane, and Other Options.

- Change the font or font size in the message list
- Select **View > View Settings**.
- Select **Other Settings** in the Advanced View Settings box.
- Select Column Font or Row Font.

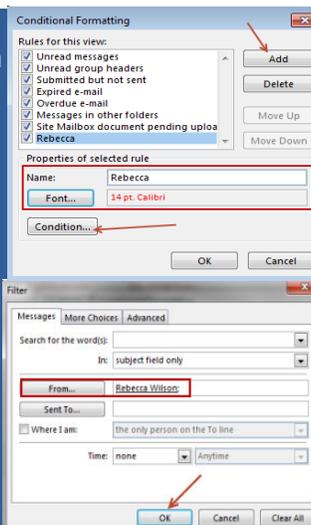
12

A. View > View Settings Conditional Formatting



To automatically color code all messages from a particular person:

1. View > View Settings > Conditional formatting > Add
2. Enter a name
3. Select a font color and Condition (specify the From name)
4. Click OK



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B. View > Show as Conversations



A conversation is a complete set of emails with the same subject from the first message through all responses. It is most useful on conversations with many responses back and forth with multiple recipients.

Conversation View:

- View > Messages > Show as Conversations

To ungroup Conversations:

- From View tab, deselect Show as Conversations.

 You are not responding to the latest message in this conversation. [Click here to open it.](#)

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C. View > Show Focused Inbox



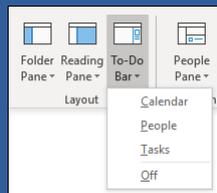
The screenshot shows the Outlook interface. The 'View' ribbon is active, and the 'Show Focused Inbox' button is checked. Below the ribbon, the search bar for the 'Current Mailbox' is visible, with 'Focused' selected. To the right, a context menu is open, showing options like 'Copy', 'Quick Print', 'Reply', etc. The 'Move to Focused' and 'Always Move to Focused' options are highlighted with red boxes.

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D. View > To-Do Bar

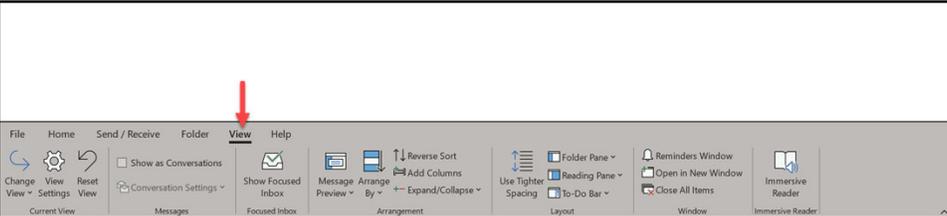


- To display the To-Do Bar, select **View > To-Do Bar**.
- Select **Calendar, Tasks, or People**. You can pick one type of the items to display in the To-Do bar, two types of items, or all three.
- To turn the To-Do Bar off, select **View > To-Do Bar > Off**.



The screenshot shows the Outlook To-Do Bar. At the top, there is a calendar for March 2019. Below the calendar, there is a section for tasks. The tasks are listed with checkboxes and due dates. The tasks are: 'No Date', 'How to add a task.', 'Contact caterer', 'Prep for team meeting', 'Today', 'Do we have access to the Hel...', and 'Need a couple of servers...'. Below the tasks, there is a 'Search People' section and a 'FAVORITES' section.

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The screenshot shows the Outlook ribbon with the 'View' tab selected. A red arrow points to the 'View' tab label. The ribbon includes options like 'Show as Conversations', 'Show Focused Inbox', 'Message Arrangement', 'Use Tighter Spacing', 'Folder Pane', 'Reading Pane', 'Reminders Window', 'Open in New Window', 'Close All Items', and 'Immersive Reader'.

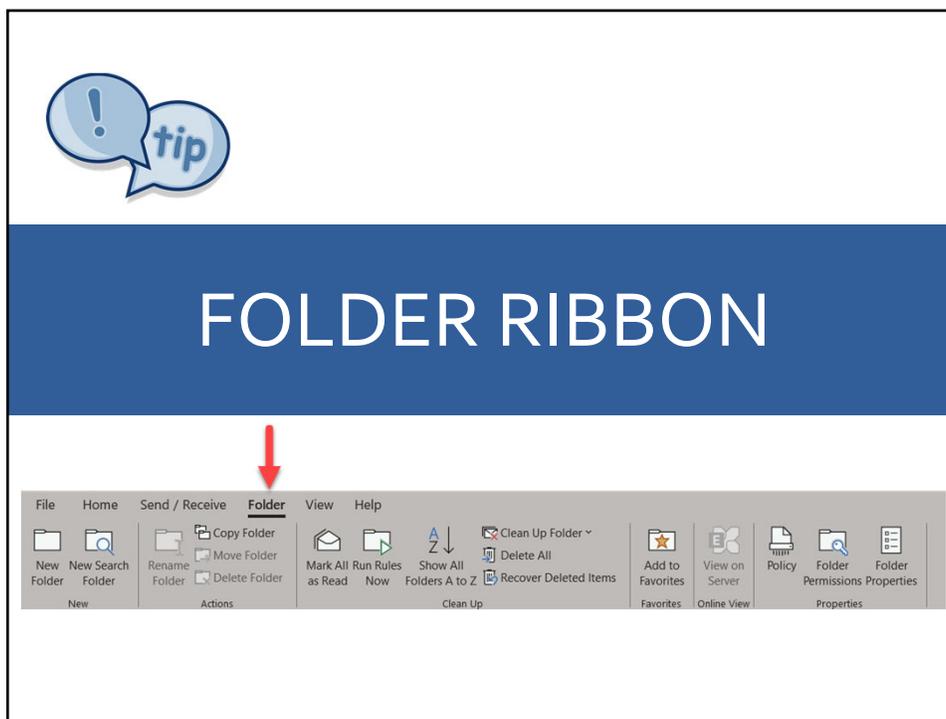
tip VIEW RIBBON

- ✓ View Settings > Other Settings (font size) + Conditional Formatting
- ✓ Show as Conversations
- ✓ Show Focused Inbox
- ✓ To-Do Bar

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III. Setup a Simple and Effective Folder System

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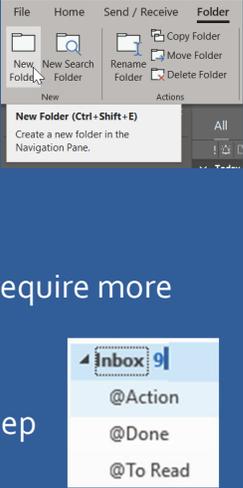
19

A. Folder > New Folder



For example: create 3 folders

- **@Action** – for emails that need to be taken care of
- **@To Read** – informative emails which require more time to read
- **@Done** - emails that are done and to keep

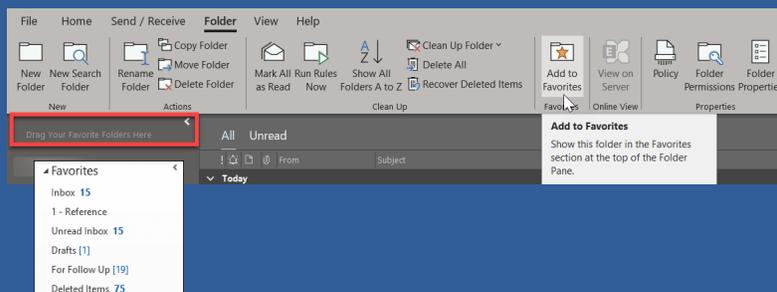


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B. Folder > Add To Favorites



- **Favorites** give visibility to folders that are otherwise buried in your mail folder list.



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MAIL - PRACTICE

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MAIL Tips – Read it once and act on it

Apply a Decision-Making Model to Manage Your Mailbox

ACTION	What to do/which menu option to use
From an email, create: a contact, appointment, or task	Select and drag the email to the icon in the navigation bar (bottom left-hand pane of the screen)
Respond to an email with a meeting	Home Ribbon > [Respond] Reply with Meeting
Respond to an email with a chat in Teams	Home Ribbon > [Respond] IM
Respond to an email by forwarding it as an attachment	Home Ribbon > [Respond] More Respond Actions

MAIL Tips – View Ribbon

Setup Views to Work Through Volumes of Email

ACTION	What to do/which menu option to use
Change the font size in the message list, the Reading Pane, or when composing a message	View Ribbon > [Current View] View Settings > Other Settings
Add a conditional formatting rule for your Inbox	View Ribbon > [Current View] View Settings > Conditional Formatting > Add
Use the conversation view in your Inbox	View Ribbon > [Messages] Show as Conversations (check-box)
Turn Focused Inbox on and off	View Ribbon > [Focused Inbox] Show Focused Inbox
View the To-Do Bar	View Ribbon > [Layout] To-Do Bar

MAIL Tips – Folders

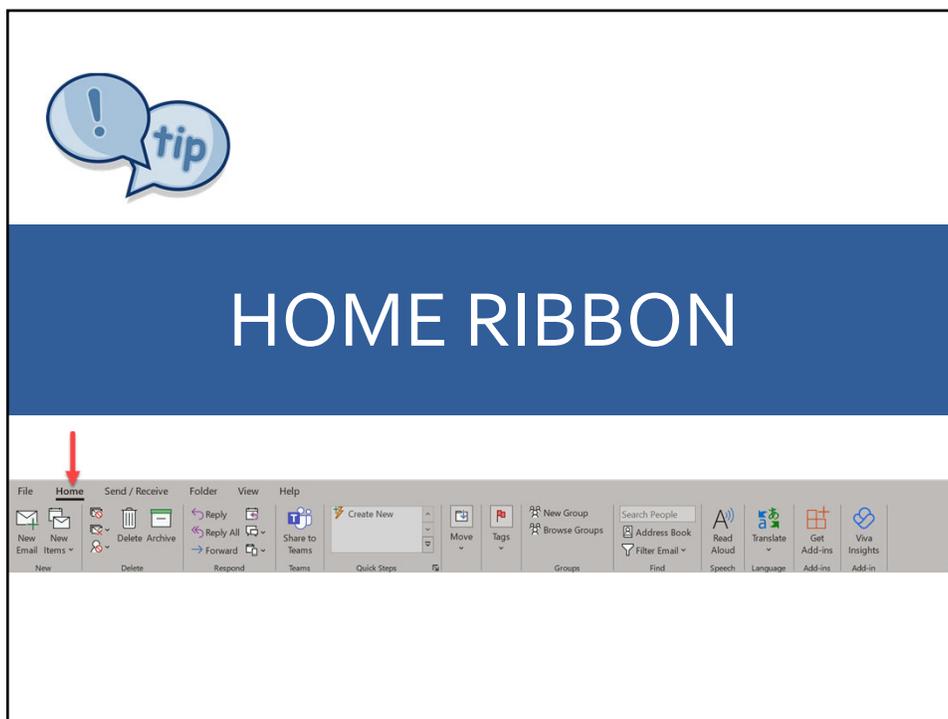
Setup a Simple and Effective Folder System

ACTION	What to do/which menu option to use
Create folders	In the left pane, right-click where you want to add the folder, and then click New Folder OR use the Folder Ribbon > [New] New Folder
Add folders to Favorites	Click a folder and drag it to Favorites (top of the left pane) OR Right-click the folder you want to add > Show in Favorites

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IV. Assign Useful Categories with Colors to Organize Emails

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Home > Categorize

- A color and/or phrase to group related items together
- The same category can be assigned to all Outlook items such as a calendar entry, a contact or a task (useful to find all items related to a project)
- More than one category can be assigned to an item (R2R, budget, support, training etc.)
- Much more efficient than using separate folders.



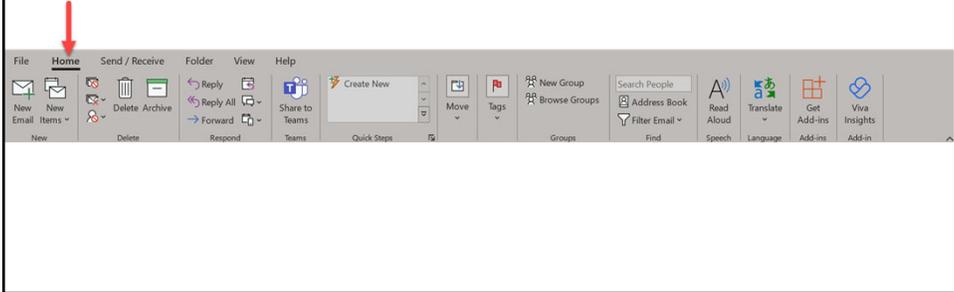
26

V. Automate your Most Repetitive Tasks

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HOME RIBBON



The image shows a screenshot of the Microsoft Outlook ribbon interface. A red arrow points to the 'Home' tab label, which is highlighted. The ribbon contains various groups of icons for email management, including 'New Email', 'Delete', 'Reply', 'Forward', 'Move', 'Tags', 'New Group', 'Browse Groups', 'Search People', 'Address Book', 'Filter Email', 'Read Aloud', 'Translate', 'Get Add-ins', and 'Viva Insights'.

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A. Home > Quick Steps



Quick Steps allows you to:

- quickly and easily perform multiple actions with a single click
- spend less time managing your email



From the **Home** tab, select the **More** arrow at the side of the Quick Steps box

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A. Home > Quick Steps

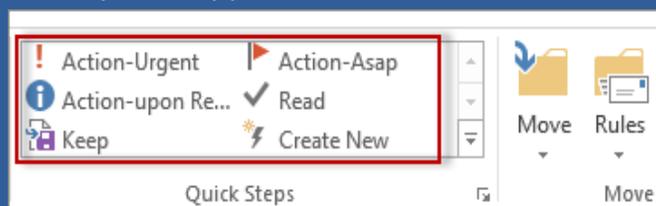
Name		Actions
Urgent		Move to folder - Action Categorize message - Urgent Flag message - Today
Asap		Move to folder - Action Categorize message - Asap Flag message - this week
Upon Response		Move to folder - Action Categorize message - Upon Response Flag message - No date
Read		Move to folder - Read
Keep		Move to folder - Keep Mark as read Categorize message - Clear all Flag message - Clear all flag

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A. Home > Quick Steps



The Quick steps will appear in the email ribbon as below:



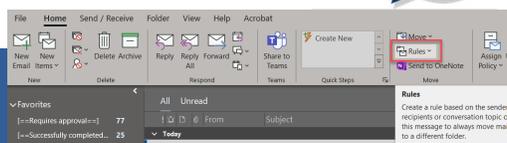
- Go through the Inbox, decide what to do with each email (Action, Read or Keep) using the quick steps.
- View and arrange emails in Action folder by categories.
- From the Action folder respond to emails.

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B. Home > Rules



Rules will:



- Make it easy to sort / route emails
- Process the email, before it arrives in your Inbox
- De-clutter your Inbox of 'graymail'
- Act as an electronic receptionist
- Help you stay organized to use your time more efficiently

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B. Home > Rules cont'd



Apply rules based on:

- Who the sender is
- To whom it is addressed to
- Specific words in subject or message etc.

Take some action:

- Move or delete
- Reply or forward
- Flag it for follow up
- Assign a category etc.

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QUICK STEPS vs RULES



- Quick steps are flexible, you can choose to apply them when you want to use them.
 - Use quick steps, when you need to do certain actions only after seeing the message.
- Rules are less flexible, once the rules are setup, they are applied automatically.
 - Use rules when you can identify a message that should be always handled in a specific way.

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C. Home > Signatures



Creating signatures

1. File > Options > Mail > Signatures > New
2. Enter the signature text in the box .
3. Select the signature for new messages.

Manually adding signature

- From the **Message** tab, **Include** group, click **signature** and select the signature to insert.

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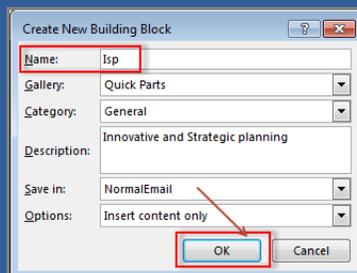
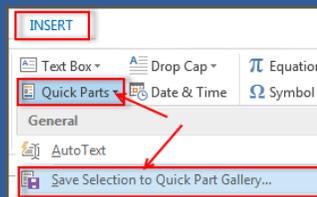
D. Home > New Email > Insert > Quick Parts



Quick part is to create and store reusable pieces of content (auto text).

To create a Quick Part:

1. Open a New mail, type the text you want to save & highlight it.
2. **Insert > Quick Parts > Save selection to quick part gallery**
3. Enter a short name in **Name** box
4. Click **OK**



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USING QUICK PARTS / AUTO TEXT

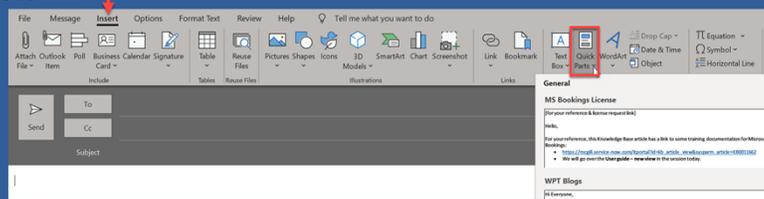


To use a Quick Parts:

- Start typing the name of the Quick Part in the body of the email, a preview will appear – press ENTER to insert (prompt will be displayed)

OR

- Click Insert > Quick Parts and then click on a saved quick part item.



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E. Home > New Email > File > Save As > Save as type: Outlook Template



A template is a message that you save to reuse it later.

To create a template:

1. Open a New Message form and create the template the same way you create an email.
2. **File > Save As.**
3. Select **Outlook Template (*.oft)** from **Save as Type** box.
4. Enter a name in **File name** box.
5. Click **Save.**

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USING TEMPLATES



1. From **Home** tab > **New Items** >
2. **More Items** > **Choose Form...**
3. Select **User Templates in File System** from the **Look in** drop-down list
4. Select the Template to use and click **Open**
5. Finish creating the message
6. Click **Send** to send the message

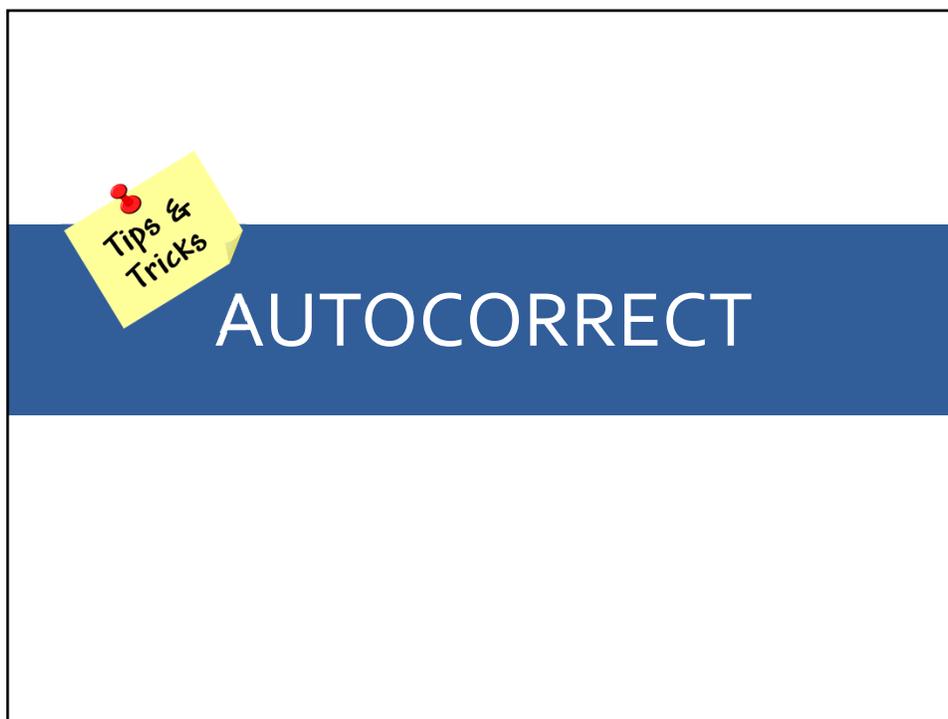
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MAIL

[Autocorrect](#)
[Find related messages](#)
[Share an email to Teams](#)
[Search](#)

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TO REPLACE TEXT AS YOU TYPE

File > Options > Mail > Compose messages: Spelling and Autocorrect > Autocorrect options: Autocorrect options
 Enter the abbreviation text in the **Replace** box, Click **Add**

Replace:	With:
mtl	Montreal is a multicultural city
maintenance	maintenance
makeing	making
managment	management
may of been	may have been

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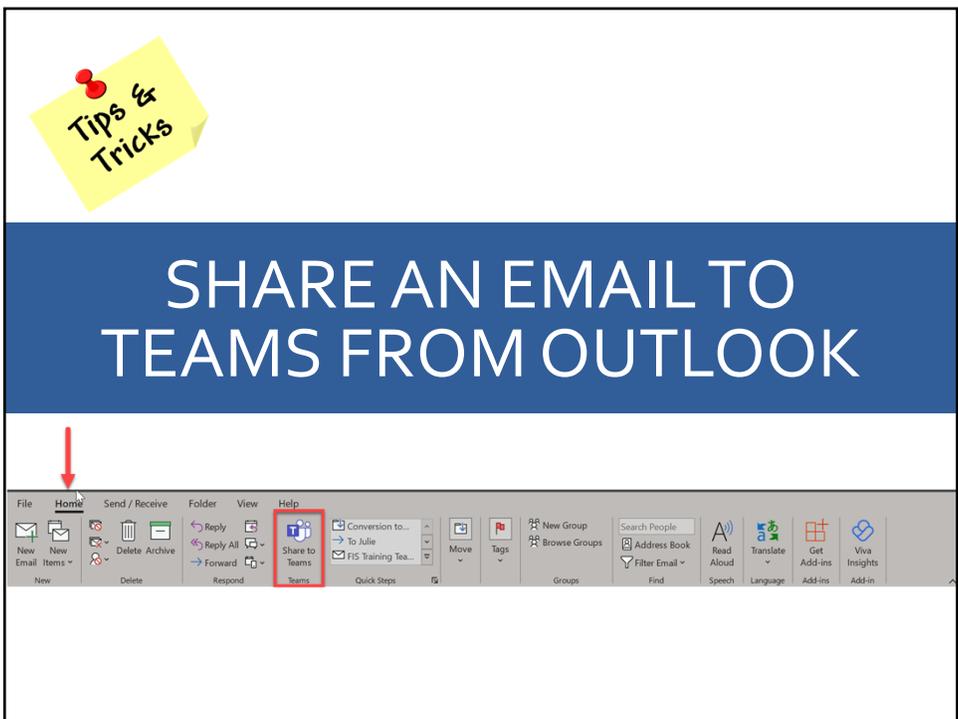
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FIND RELATED MESSAGES

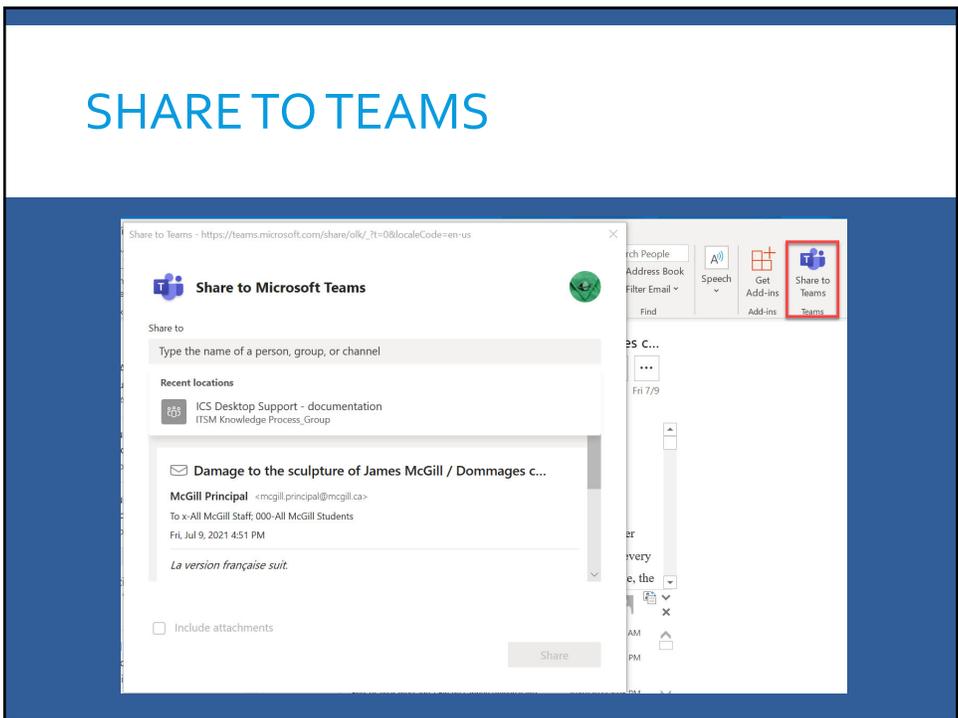
Right click on the message and select **Find Related** and then select messages in this conversation or from the sender option.

The screenshot shows an Outlook inbox with several messages from 'isrbp@campus.mcgill.ca'. A right-click context menu is open over the top message. The 'Find Related' option is highlighted in red, and its sub-menu is open, showing 'Messages in this Conversation' and 'Messages from Sender' also highlighted in red. Other options in the menu include Copy, Quick Print, Reply, Reply All, Forward, Mark as Read, Categorize, Follow Up, Assign Policy, and Quick Steps.

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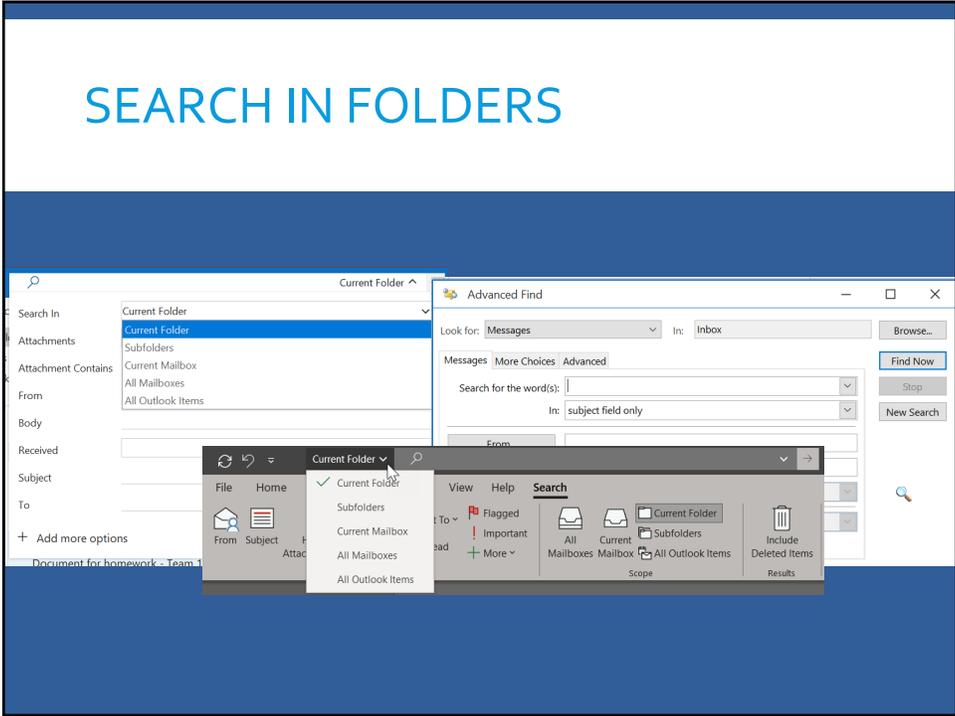
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MAIL - PRACTICE

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MAIL Tips – Home Ribbon > [New] New Email

Automate your Most Repetitive Tasks

All of these options work when creating a new email, replying to an email, or opening a draft email

ACTION	What to do/which menu option to use
Create a personalized signature	Insert Ribbon > [Include] Signature > Sigr
Create a Quick Part (or Autotext)	Ent Qui Inse
Create a template	Sele Hor As : Sav To t lten Use

MAIL Tips – Home Ribbon

Assign Useful Categories with Colors to Organize Emails
Automate your Most Repetitive Tasks

ACTION	What to do/which menu option to use
Tag emails with a color category	Home Ribbon > [Tags] Categorize
Create a Quick Step to use when needed (NOT automatically applied when a message is received) <small><i>*once applied, a Quick Step may not be undone</i></small>	Home Ribbon > [Quick Steps] Create New
Set-up a rule that will be automatically applied when a message is received	Based on a selected email: Home Ribbon > [Move] Rules > Create Rule OR Home Ribbon > [Move] Rules > Manage Rules Alerts > New Rule

MAIL Tricks

ACTION	What to do/which menu option to use
Autocorrect – replace text as you type	File > Options > Mail > Compose messages: Spelling and Autocorrect > Autocorrect options: Autocorrect options Enter the abbreviation text in the Replace box, Click Add
Find related messages	Right click on the message > Find Related > Messages in this Conversation OR Messages from Sender
Share an email to Teams	Home ribbon > [Teams] Share to Teams
Search	Search box at the top of the Outlook window – broaden or narrow the search with the pull-down menu

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EMAIL: OPTIONS RIBBON

When creating a new email, replying to an email, or opening a draft email



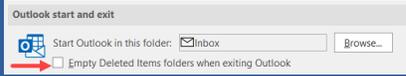
The screenshot shows the Outlook ribbon with the 'Options' tab selected. A red arrow points to the 'Options' tab. The ribbon includes sections for 'File', 'Message', 'Insert', 'Options', 'Format Text', 'Review', 'Help', and 'Tell me what you want to do'. The 'Options' section contains buttons for 'Bcc', 'From', 'Encrypt', 'Use Voting Buttons', 'Request a Delivery Receipt', 'Request a Read Receipt', 'Save Sent Item To', 'Delay Delivery', and 'Direct Replies To'. There are also 'Show Fields', 'Encrypt', 'Tracking', and 'More Options' options.

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MORE OPTIONS



- Use Voting Buttons
- Delay Delivery
- Direct Replies To
- Display Bcc and From fields
- Automatically empty Deleted items folder
(File> Options> Advanced...)



The screenshot shows the 'Outlook start and exit' dialog box. It has a text field for 'Start Outlook in this folder:' with 'Inbox' entered and a 'Browse...' button. Below it is a checkbox labeled 'Empty Deleted Items folders when exiting Outlook' which is currently unchecked. A red arrow points to this checkbox.

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MAIL RECAP

- Organize mailbox using Folders
- Assign Categories with color to view priority emails or actionable emails at a glance
- Create and use Quick steps to save time /perform repetitive tasks
- Create Quick parts and Templates for future use (repetitive text)
- Create rules to organize emails as it arrives
- Conversation Clean Up
- Using Voting buttons (Options > Tracking: Use Voting buttons)

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CALENDAR

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VIEWING CALENDAR



- View calendar by day, week or month
- Highlight multiple days to see those calendar days
- To find your availability on random days: (8, 17, & 29):
 - Select Day view, hold down Ctrl key and click on 8,17 & 29.
- To view a particular day:
 1. Press **Ctrl+G**
 2. Then specify a date or even enter in normal language like , '2nd Monday in December'

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CREATE A NEW CALENDAR

- Create multiple calendars (e.g. a calendar for work and another one for personal appointments)
 - From calendar **Home** tab, Manage calendars group, click **Add calendar**, select **Create New Blank Calendar** and enter a name for the new calendar.



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CALENDAR SETTINGS: File > Options > Calendar



- ✓ Edit Work hours (start/end time) and Work week
- ✓ Uncheck default reminders
- ✓ Add holidays, time zones etc.
- ✓ Change default calendar color
- ✓ Show weather on the calendar

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APPOINTMENTS



Appointment blocks off a specific period of time to do something (meeting, work on a specific task)

- ✓ Create an appointment from an email
(Simply drag the email from the mailbox to the calendar. Specify the date and time for the appointment.)
- ✓ Use categories with color to recognize your activities
- ✓ Set appointments as private, out of office (eg. vacation)
- ✓ Set up recurring appointments in one step
- ✓ May have reminders

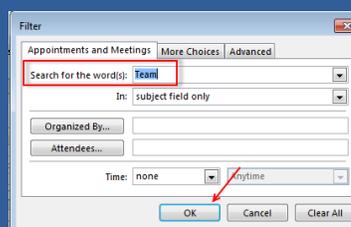
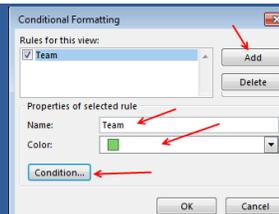
61

CONDITIONAL FORMATTING OF CALENDAR ITEMS



To automatically color code calendar items:

1. Click View > View Settings > Conditional formatting > Add.
2. Enter a name.
3. Select a color and Condition (specify the condition).
4. Click OK.



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CALENDAR

Calendar techniques helps you to:

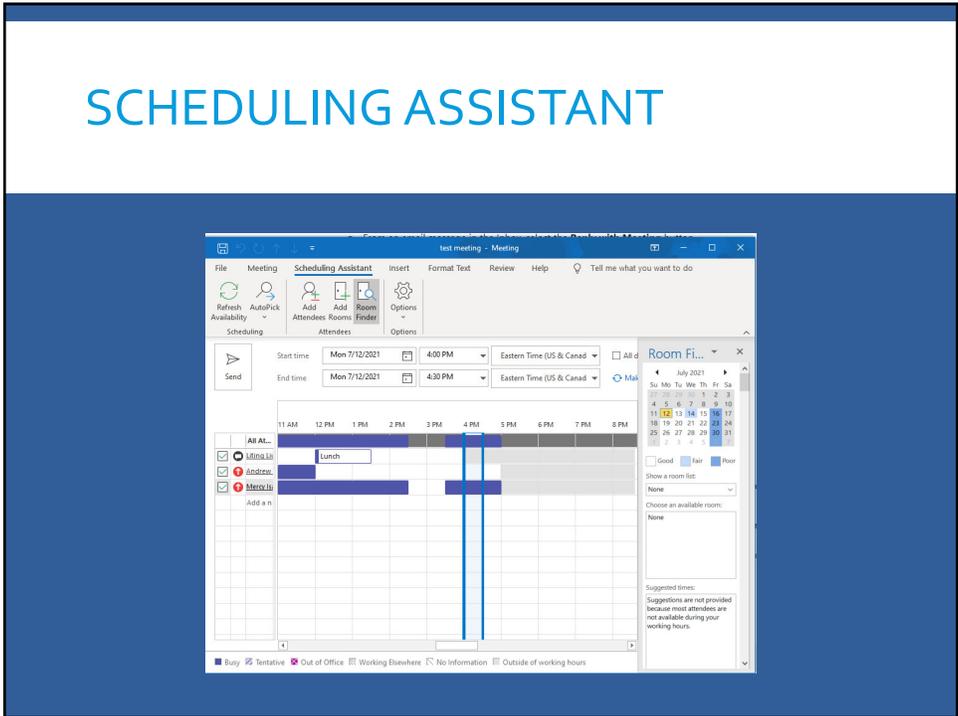
- Plan your day more effectively
- Customize settings to show exactly what you want
- Share your availability with others



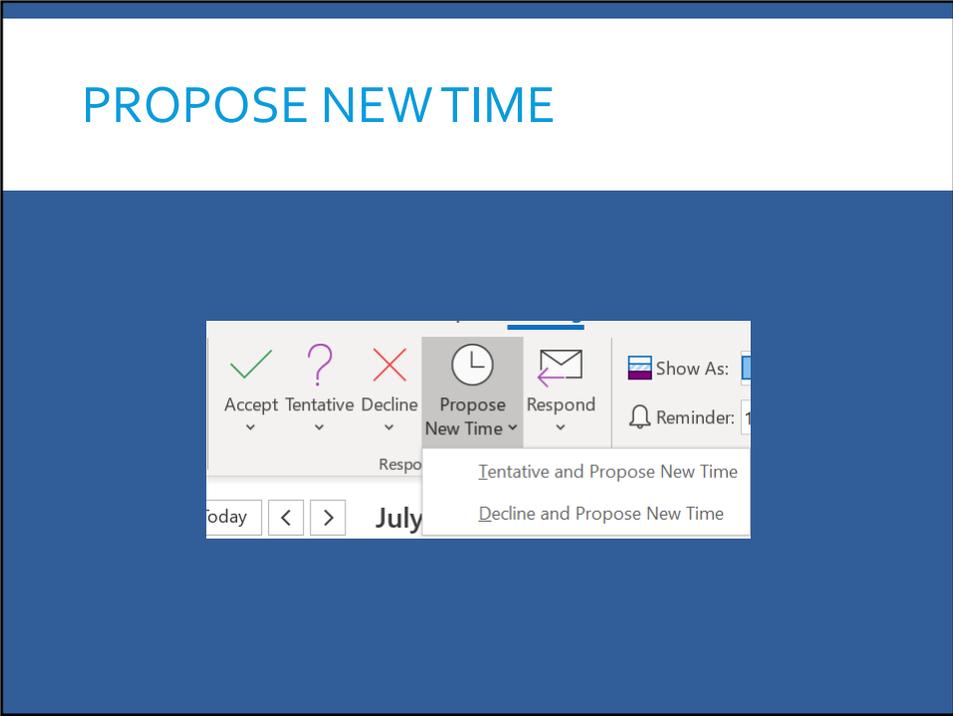
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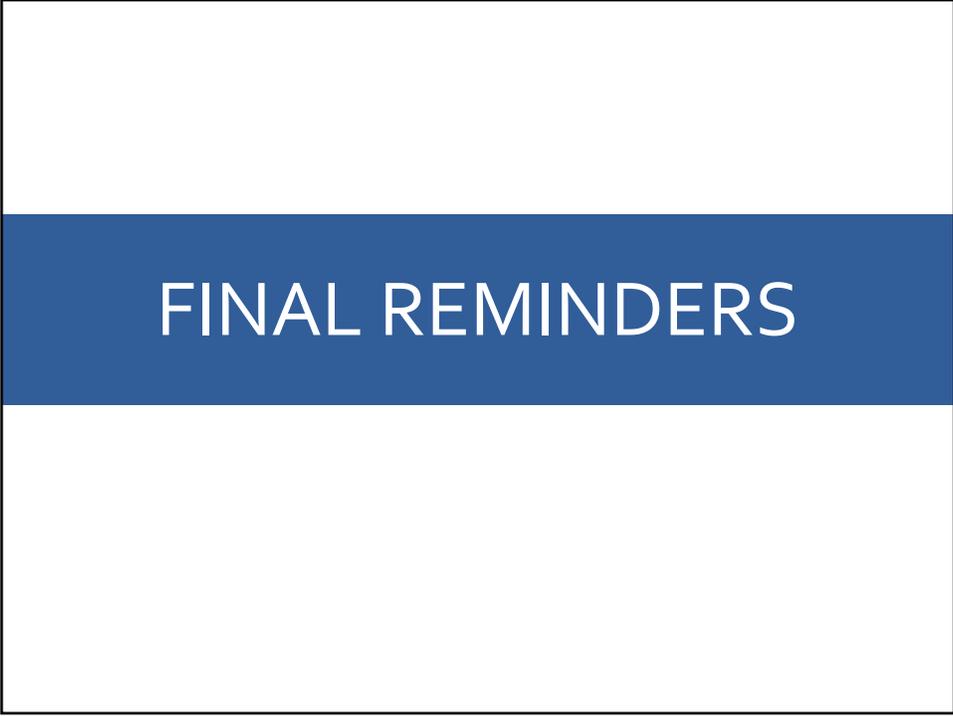
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MCGILL EMAIL POLICY

Policy on Responsible Use of McGill IT Resources: Faculty and staff are **not** allowed to systematically forward or sync McGill email to an external (non-McGill) email server. The only way to manage your McGill email accounts is to set up your accounts on Outlook or another app on your device.

<https://www.mcgill.ca/secretariat/responsible-use-it>

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SHORTCUTS

Ctrl+Shift+m	New Message
Ctrl+Shift+i	Moves to Inbox
Ctrl+Shift+k	New Task
Ctrl+Shift+e	New email folder
Ctrl+N	Create new item
Ctrl+S	Send a message
Ctrl+R	to reply
Ctrl+F	to forward
Ctrl+D	to delete

Ctrl+1	for Mail
Ctrl+2	for Calendar
Ctrl+3	for Contacts
Ctrl+4	for Tasks
Ctrl+5	for Notes
Ctrl+6	folder list

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