Quick Reference: Time Management & Sharing

Quick Reference: **Time Management & Sharing**

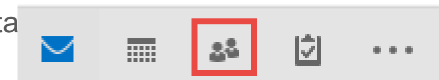
Quick Reference: **Time Management & Sharing**

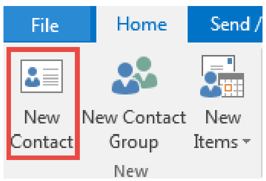
Contacts

The Global Address Book can be used to address e-mails to those with a UMMC e-mail, but UMMC employees and other outside contacts to the contacts list. Then, additional information can be entered for UMMC employees and outside contacts.

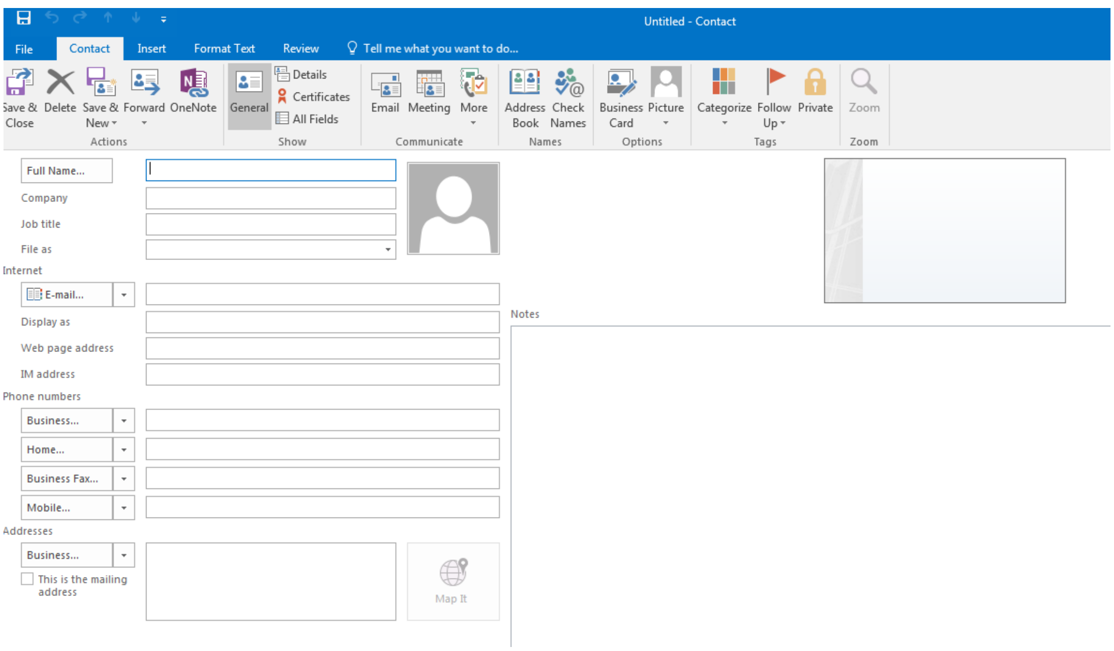
Add a New Contact

1. Click **People** at the bottom of the Navigation pane above the Status bar.
2. Click **New Contact** in the *New* group of the *Home* ta





3. Enter the information for the contact.



4. Click **Save & Close** when done.

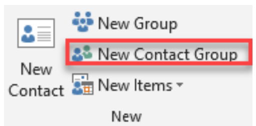
Suggested Contacts Folder

This folder stores addresses entered in the Address fields similar to the AutoComplete as experienced in previous versions of Outlook. When starting to type an address, Outlook matches the typing with addresses in the suggested contacts folder and finishes the address if it finds a match or displays a drop-down list if several matches are found. This folder can be selected to delete multiple addresses or unwanted or incorrect addresses.

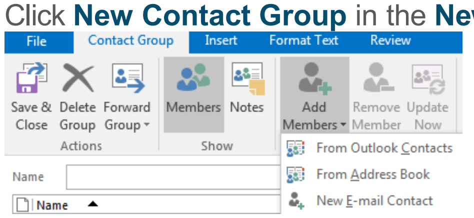
Quick Reference: **Time Management & Sharing**

Create a Group in the Address Book

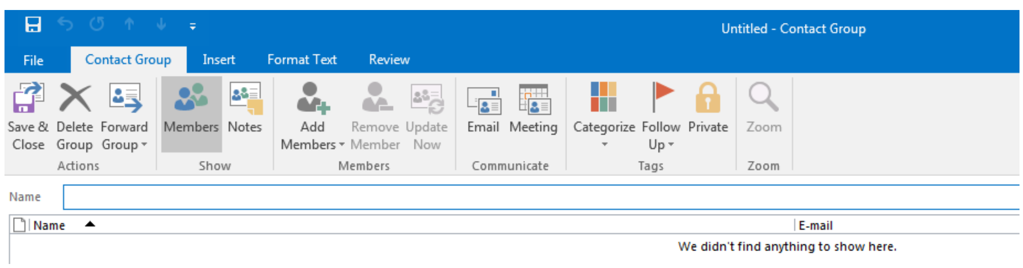
Groups (distribution lists in previous versions) can be created with several contacts who need to be e-mailed together on a regular basis. Those groups are created and edited in Contacts. The contacts can come from the Contacts folder, Global Address List, or addresses or typed manually.



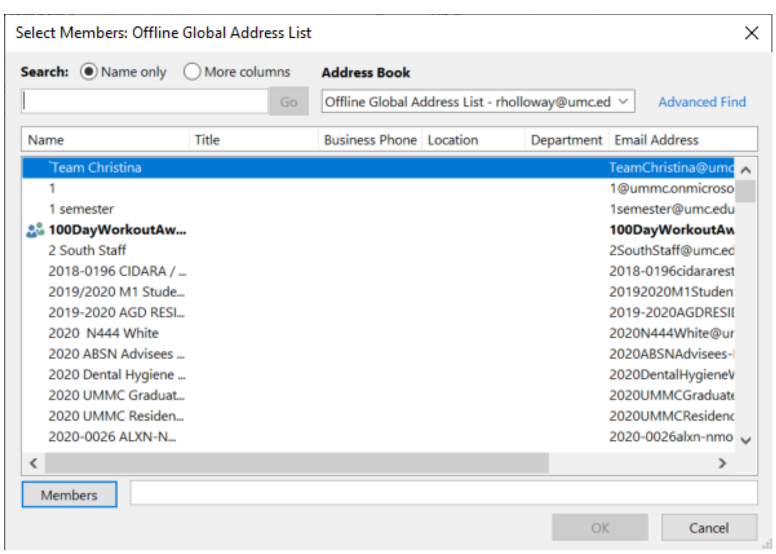
1. Click **People** at the bottom of the Navigation pane.
2. Click **New Contact Group** in the **New** group of the **Home** tab.



3. Type a name for the group.
4. In the **Contact Group** group on the **Ribbon**, click **Add Members**.



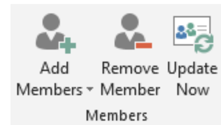
5. Click **From Address Book**. Use the Global Address List or select another Contacts list.

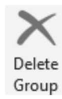


Quick Reference: **Time Management & Sharing**

6. Double-click each name or click **Members->** to add them to the group list.
7. Click **OK** when done selecting members.
8. Click **Save & Close**.

Edit a Group



1. Double-click the group in Contacts to add new members using in the instructions in the previous steps, or select a member name and click **Remove Member** in the **Members** group to delete someone.
2. Do not use 

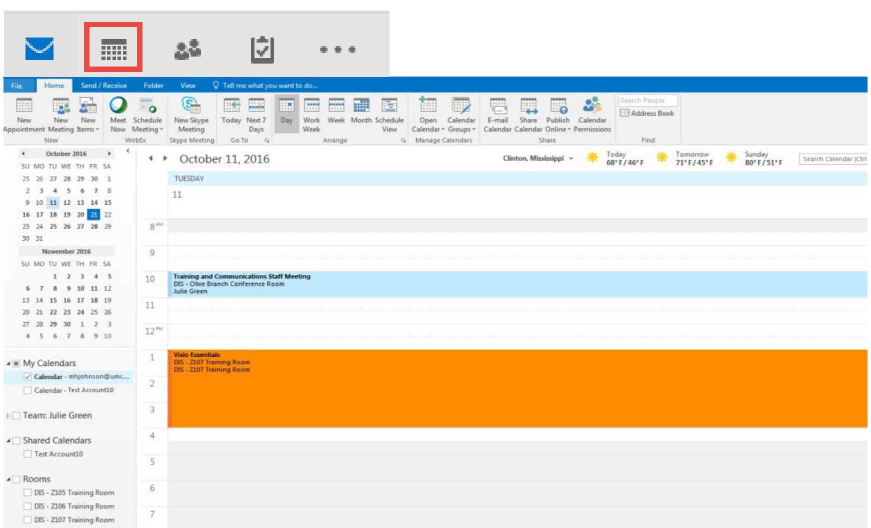
on the ribbon as this deletes the group. The group will be in Deleted Items if the Delete Group Button is clicked accidentally. Just drag from Deleted Items to Contacts to restore a deleted group.
3. Click **Save & Close**.

Scheduling (Calendars)

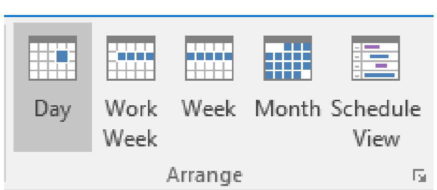
The Microsoft Office Outlook 2019 Calendar is the calendar and scheduling component of Office, and is fully integrated with e-mail, contacts, and other features.

Calendar Views

1. Click **Calendar** at the bottom of the **Navigation Pane**.



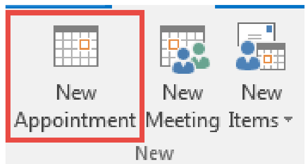
2. To change the view, click the buttons in the **Arrange** group.

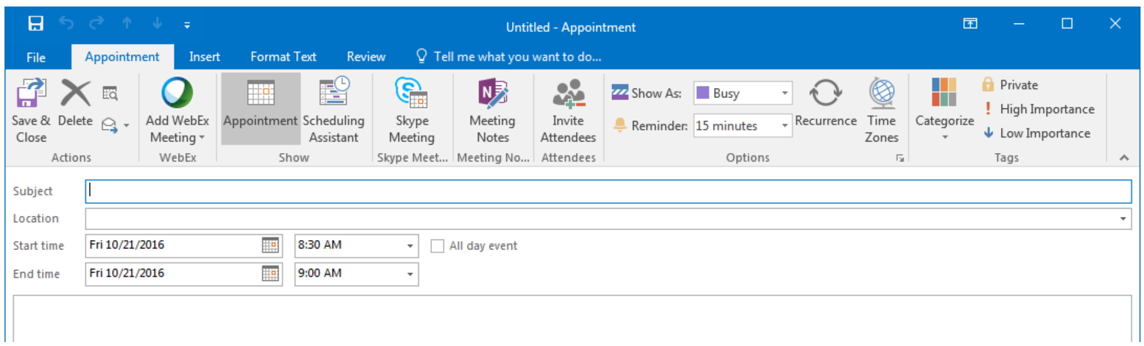


Quick Reference: **Time Management & Sharing**

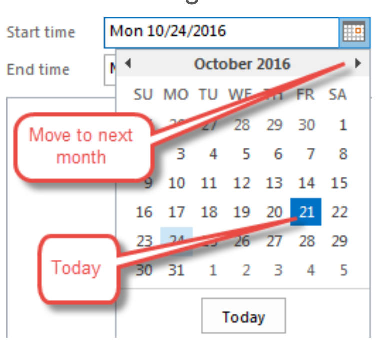
Create a New Appointment

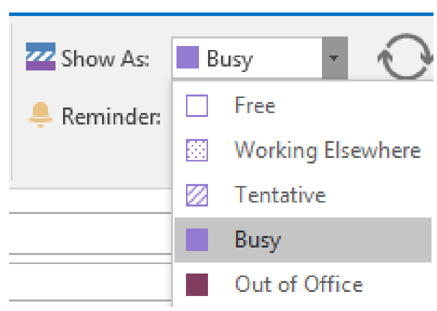
1. Select any time slot in the Outlook Calendar and begin typing or click **New Appointment** in the **New** group of the **Home** tab when in Calendar view.





2. Type a **Subject** and **Location** for the appointment.
3. Enter the Start date and time and end date and time. Use the calendar icon to open the Date Navigator.



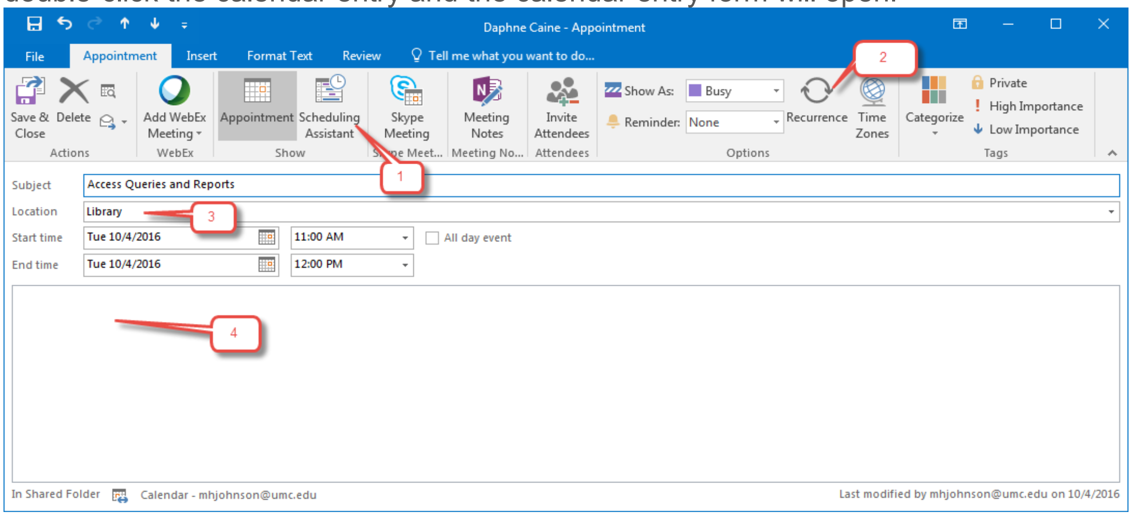


4. Use **Show As:** to mark time as Busy or Out of the Office. This helps those viewing a calendar so they don't book someone for back to back meetings when they are out of the office.
5. Use **Busy** if the appointment is in or near your regular office.
6. Use **Out of Office** or **Working Elsewhere** if the appointment is not near your regular office.
7. In the body area, type any other information needed for reference.
8. Click **Save and Close**.

Quick Reference: **Time Management & Sharing**

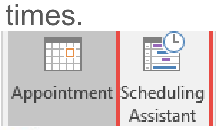
Change Existing Appointment

To add elements to the appointment or change it to an event (an appointment that lasts longer than 24 hours) or a meeting (an appointment with other people invited), simply double-click the calendar entry and the calendar entry form will open.



Change an Existing Appointment to a Meeting

1. Go to the calendar to open an existing appointment by double-clicking to open.
2. Click **Scheduling Assistant** to invite attendees to an appointment and change it to a meeting. If the Invitees are using their calendars to record their schedules, the **Meeting Organizer** will be able to effectively schedule around their busy times.



NOTE The Location field's contents are visible in the calendar view. This is a great place to put the phone-in numbers for conference calls.

3. The text area of the form is useful to enter details of the entry or attach a file by clicking in the text area,
4. clicking on the **Insert** tab, and choosing the **Attach File** Attach File icon.

Mark Appointments as Private

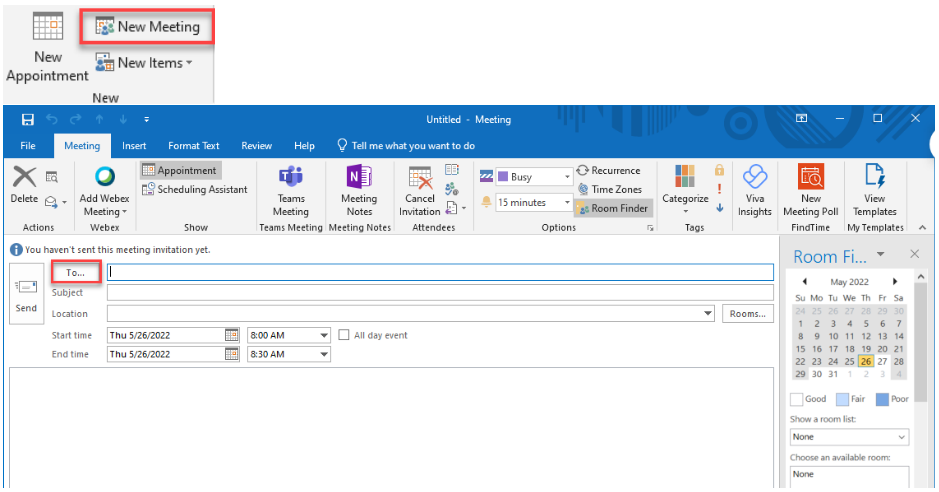
Appointments can be marked as private so that those with whom a user shares their calendar cannot read personal appointments. UMMC encourages everyone to enter all their appointments during working hours, even if personal, because an appointment will affect availability for other **meetings**. Click the **Private** button Private in the **Tags** group on the **Appointment** tab. Also, tasks, contacts, and contact groups can be marked as Private.

Quick Reference: **Time Management & Sharing**

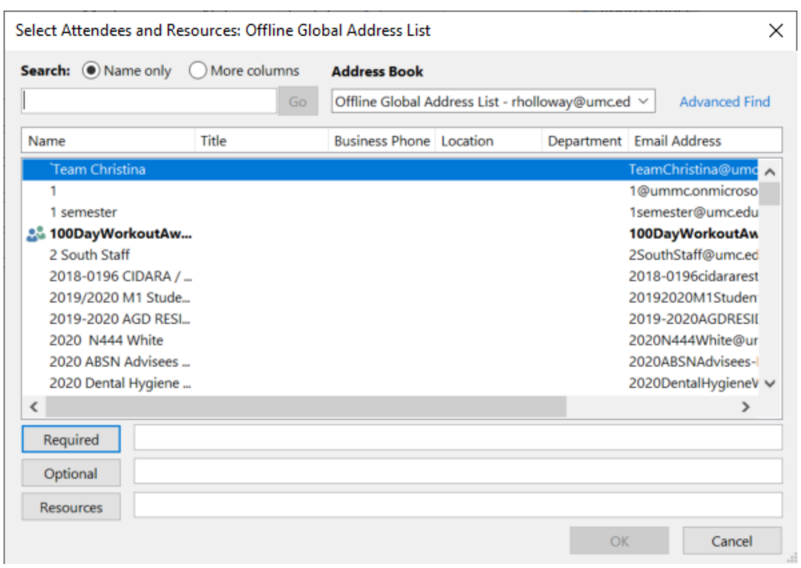
Organize Meetings

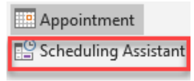
Invite others to a meeting by clicking the **Invite Attendees** on the **Appointment** tab or by starting with a **New Meeting** Invitation

1. Click **New Meeting**, **New Meeting**, in the **New** group of the **Home** tab when in Calendar view.
2. Complete the **Subject**, **Location**, **Start time**, **End time**, and an explanation of the meeting in the body area.

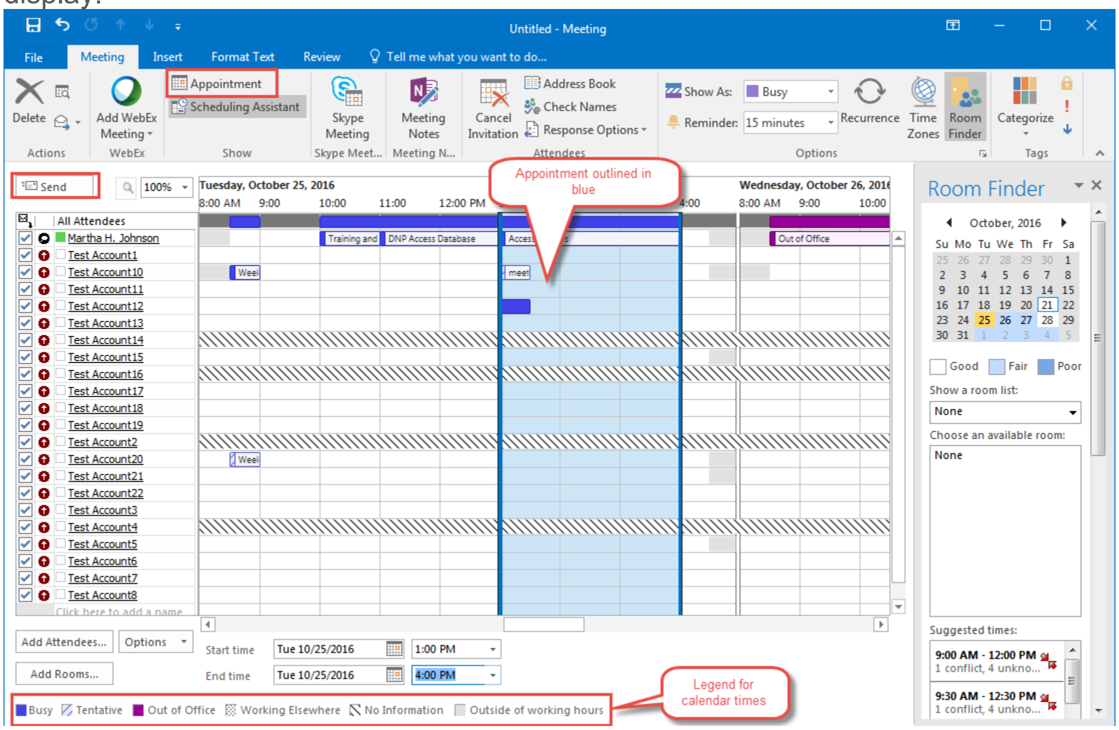


3. Click **To**: and select meeting attendees. Select them as **Required** or **Optional**. A Resource, such as a room, can also be selected.



4. Click **Scheduling Assistant** 

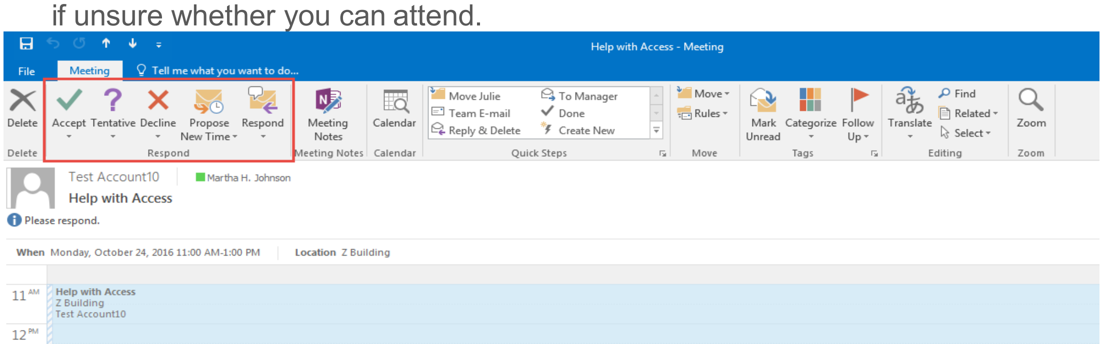
in the **Show** group of the **meeting** tab to see if the attendees are available or busy. A black icon appears to the left of the meeting organizer, a red icon appears to the left of a require attendee, and a blue icon appears to the left of an Optional attendee. A green icon appears to the left of a resource. If an invitee is busy, the times that are scheduled on their calendars display.



5. Click Appointment to return to the appointment or click **Send** when ready to send the meeting invitation. The meeting will appear on the recipient's calendar in **tentative** status until they accept or decline the invitation.

Respond to Meeting Requests

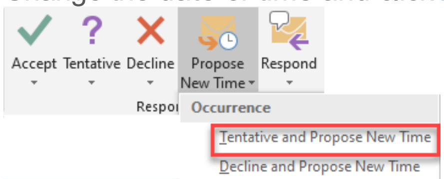
1. When a meeting request is received, in the **Response** group, click **Accept** to put the meeting on the calendar, click **Decline** to reject the invitation, or click **Tentative** if unsure whether you can attend.



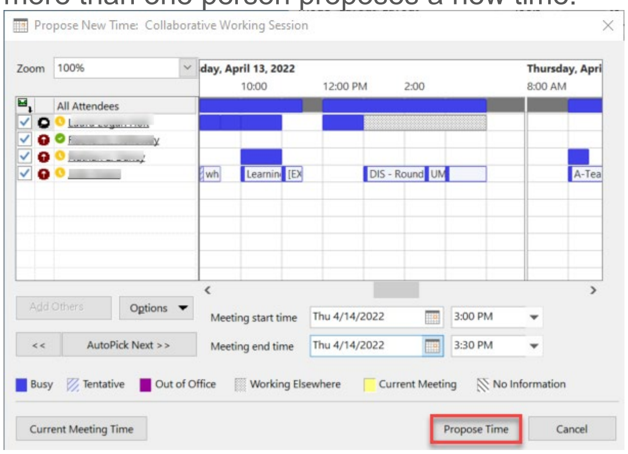
Outlook will show that section of the calendar which contains the new meeting so you can see if you have conflicts that day.

Quick Reference: Time Management & Sharing

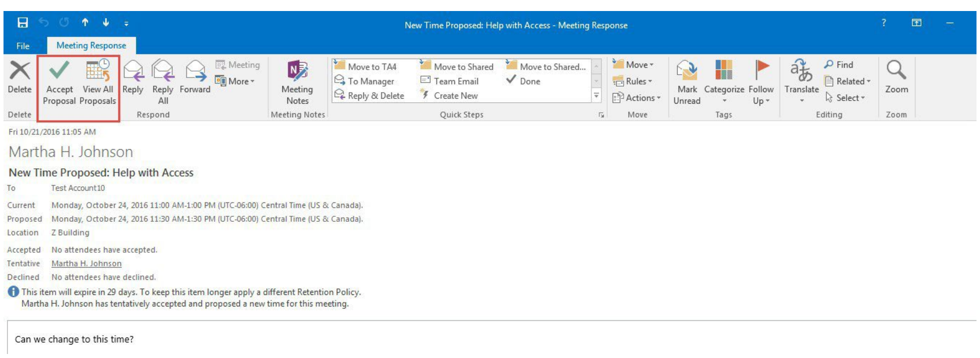
2. If you Accept, you can choose to send a response or not.
3. If the meeting organizer allows it, the invitee can accept as tentative or decline and propose a new time by clicking **Propose New time** in the **Respond** group. Change the date or time and click **Propose Time**.

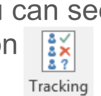


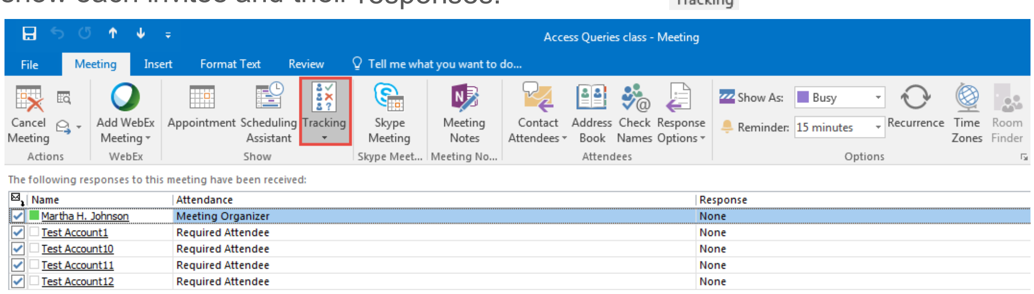
4. If the invitee proposes a new time, the meeting organizer can either **Accept Proposal** and send an update to the other invitees or **View All Proposals** when more than one person proposes a new time.



5. The organizer will receive the reply and can **Accept the Proposal**, **Delete**, or **View All Proposals** when a group has been invited.



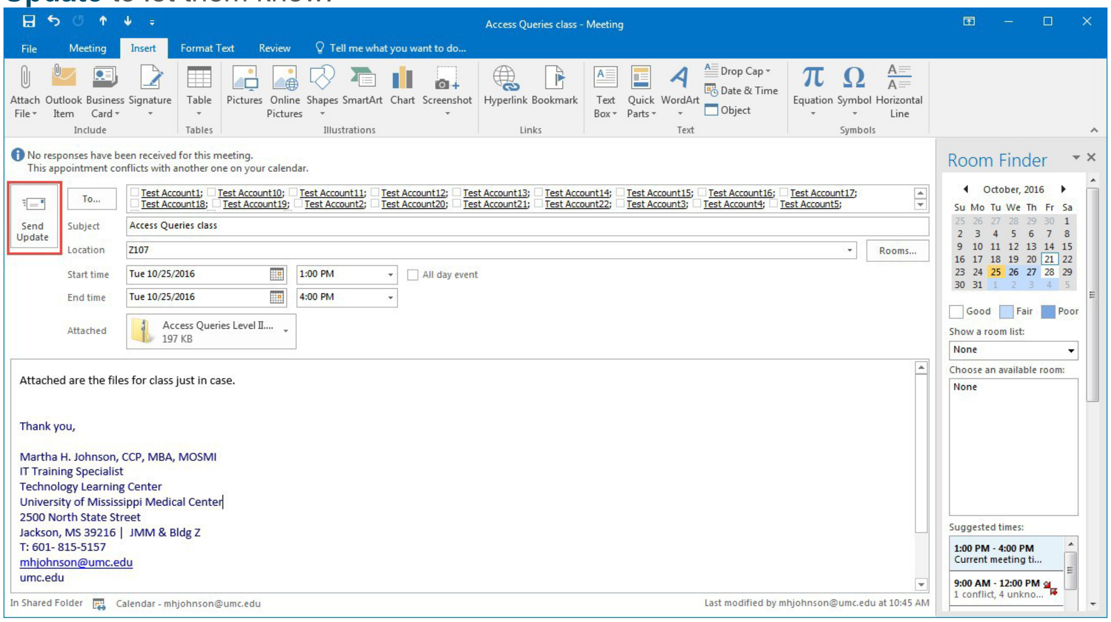
When you open the meeting on your calendar, you can see how many have accepted, declined, or marked tentative. The **Tracking** button  of the meeting form will show each invitee and their responses.



Quick Reference: Time Management & Sharing

Reschedule a Meeting

To change a meeting you have organized, locate the meeting on your calendar and double-click to open it. If you make changes that affect others, be sure to click **Send Update** to let them know.

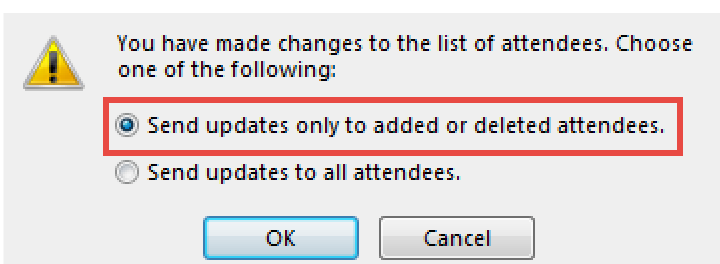


Change a Recurring Meeting to Add or Remove an Invitee

When multiple attendees are invited to a recurring meeting, care should be taken when other attendees are added or previously invited attendees are removed.

1. Double-click the recurring meeting in the calendar of the meeting organizer.
2. Add an attendee or remove an attendee from the **To:** line.
3. Click **Send Update**. 

4. Be sure to select to send the update to **only** the affected attendee.

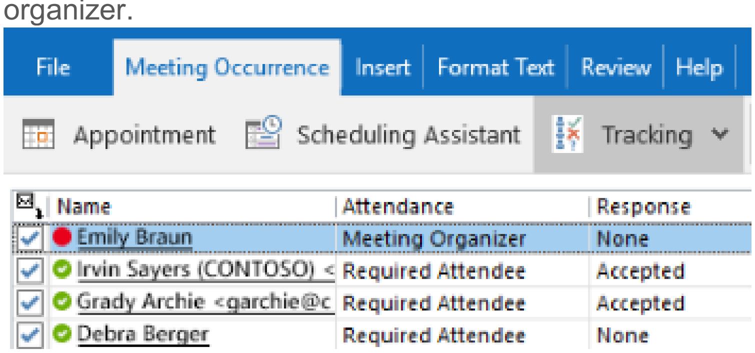


5. Click **OK.**

Quick Reference: **Time Management & Sharing**

Know Who You'll be Meeting With

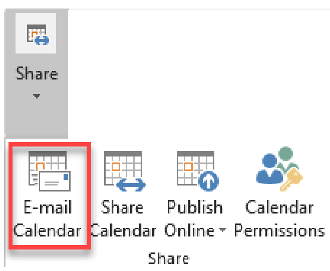
See people's responses to a meeting request, even if you aren't the meeting organizer.



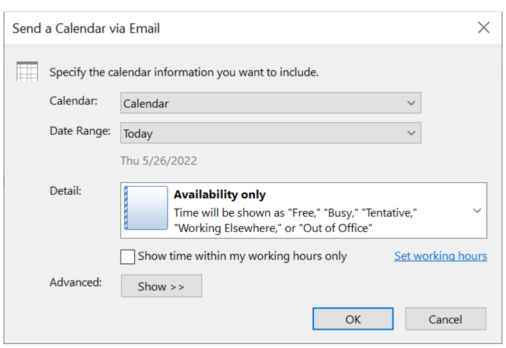
Send Calendar to Anyone Through E-Mail

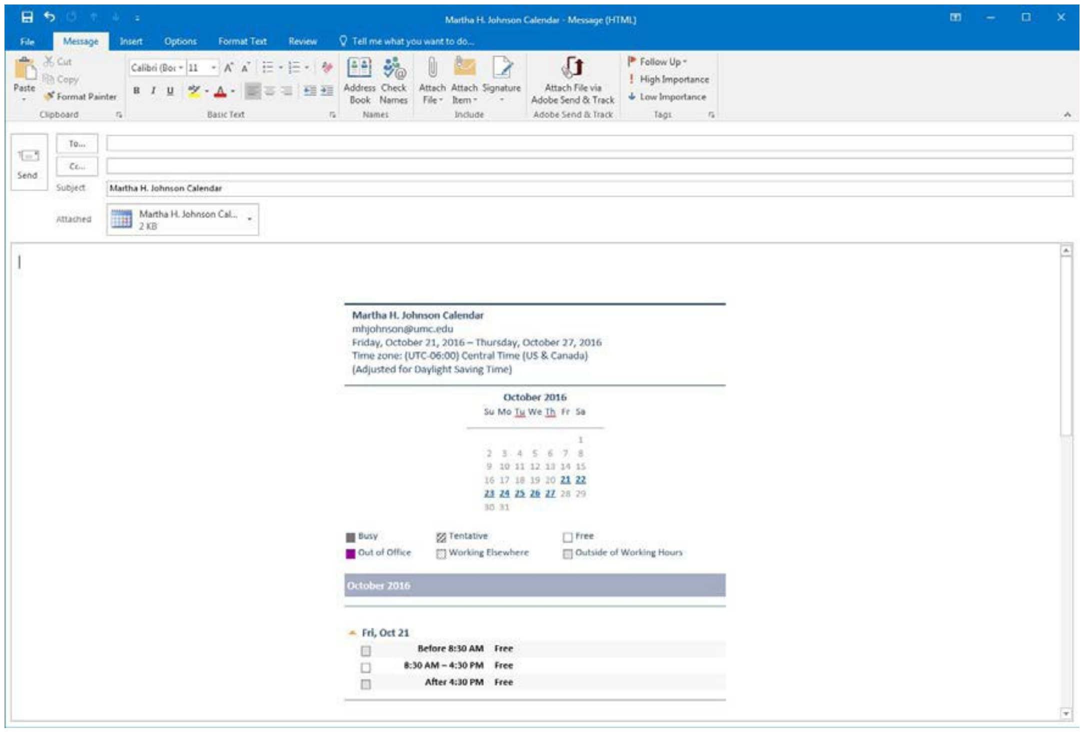
In Calendar view, you can send your calendar to a mail recipient as an Internet Calendar, while retaining control over how much information is shared. Your calendar information appears in the body of the e-mail message and as an Internet Calendar attachment that the recipient can open in Outlook.

1. Click Share Calendar on the Share group.



2. Select the Calendar; select the Date Range, Detail, etc. and click Ok when done.



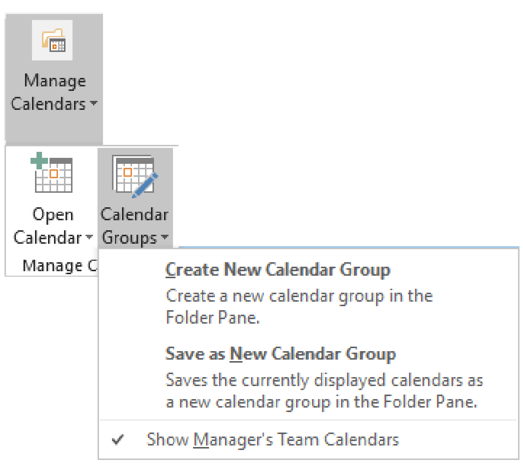


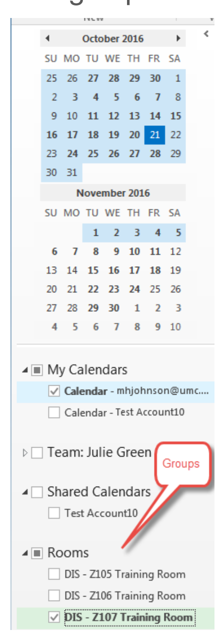
3. Fill in the To box and click Send.

Add a New Calendar Group

By default, in the Navigation Pane, Outlook 2019 organizes your calendars into groups, such as, **My Calendars** and **Shared Calendars**. You can rename these groups or create additional calendar groups to organize the calendars in a way that fits your work style better.

1. Click Calendar Groups in the Manage Calendars group of the Home tab when in Calendar view.



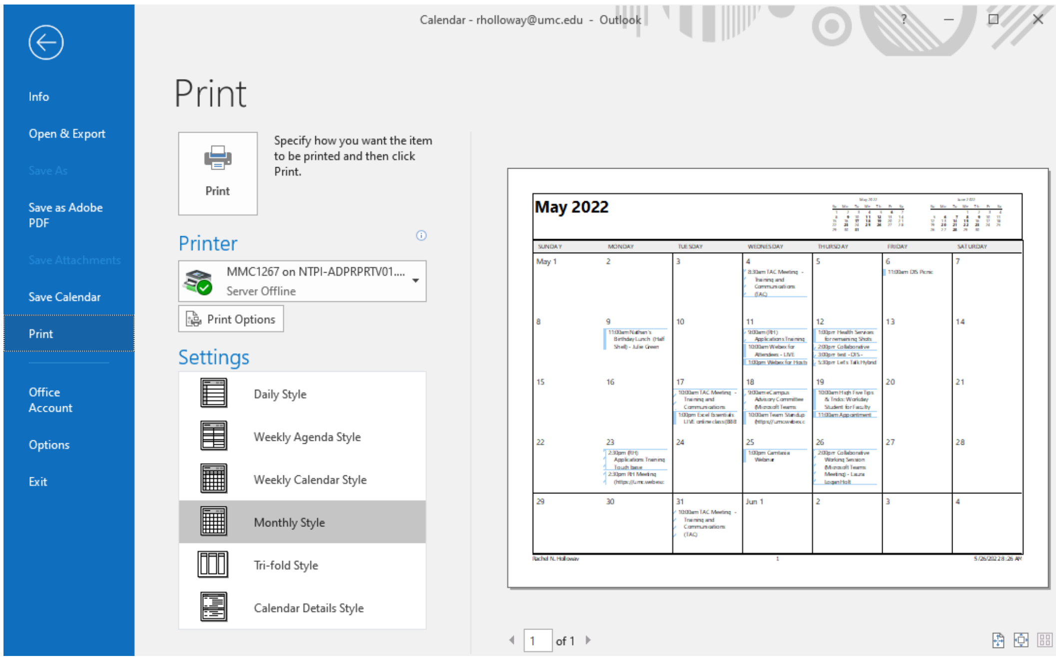


2. Click Create New Calendar Group.
3. Type a name for the group and click OK.

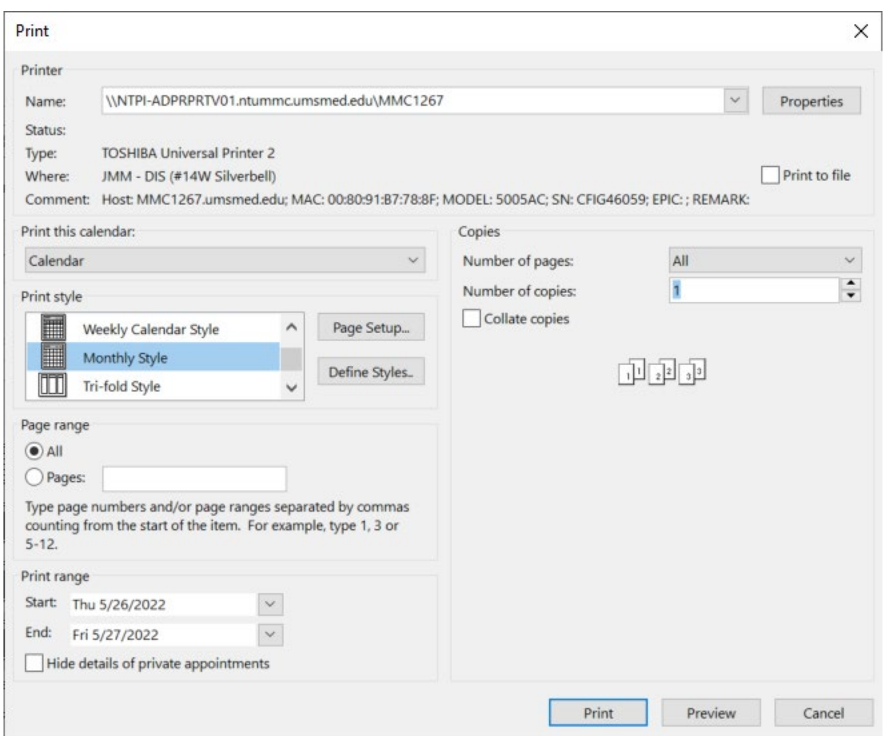
Quick Reference: Time Management & Sharing

Calendar Printing

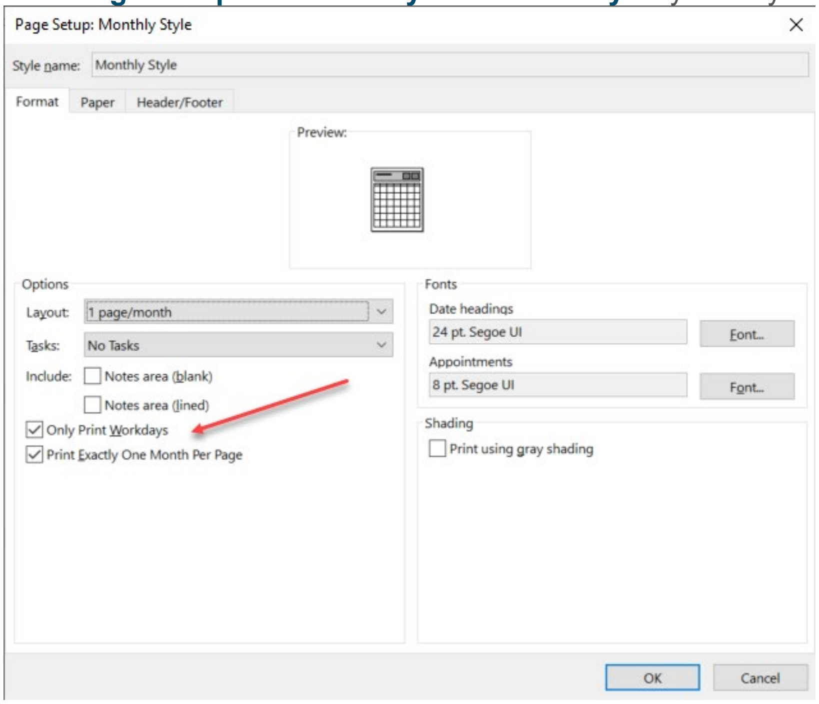
1. Select the calendar view you want to print, such as day, month, etc. or you can select after step2.
2. Click the **File** tab and **Print**.



3. Select a printer.
4. Click **Print Options** to set a date range or other options.



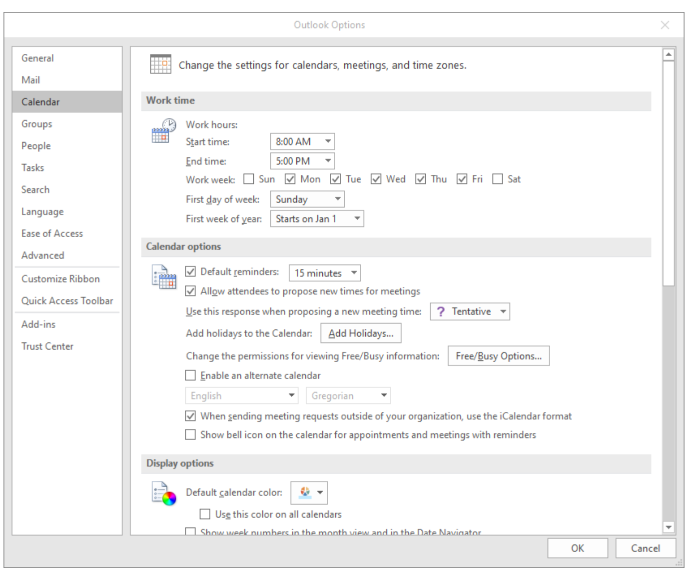
5. Click **Page Setup** to select **Only Print Workdays** if your days off are showing.



6. Click **Preview** to return to preview.
7. Click **Print** when ready to print.

Set Calendar Default Options

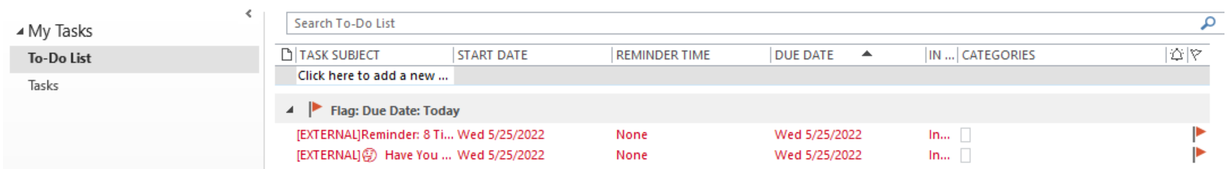
1. Click the **File** tab and click **Options**.
2. Click **Calendar.**
3. Select the work week days and times and other options.
4. Click **OK** twice when done



Quick Reference: **Time Management & Sharing**

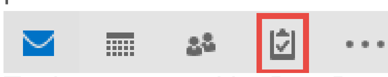
Tasks

A task is an item that should be completed by a specified date and time which you can assign to yourself, another Outlook user, or a group of users. Tasks can be recurring if they are performed at regular intervals. You can attach files to tasks you send to other users. You can click **Follow-up** in an e-mail to make it a task. Past due tasks display in red in the Task list. Completed tasks will have a line drawn through them.

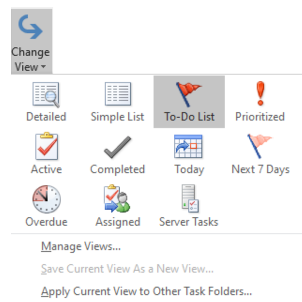


View Your Task

1. Click **Tasks** in the bar below the Navigation pane.

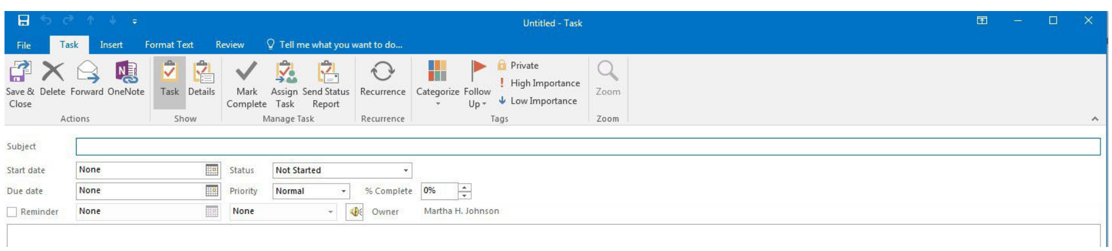


2. Tasks are sorted by Due Date. Use the **Current View** group to change the Task view.



Create a Task

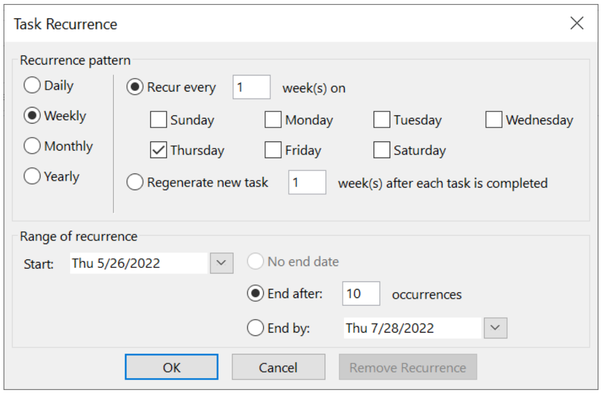
1. Click the **New Task** button  in the **New** group on the **Home** tab of Task view.



2. Enter the **Subject**, **Start date, Due date**, set a **Reminder**, add a **Category**, **importance** and a **Priority**, if needed.
3. Click **Recurrence** for tasks that will be repeated on a regular basis and regenerate the task, if needed.

Quick Reference: **Time Management & Sharing**

4. Type an explanation of the task in the body area, especially if you plan to assign this task to someone.

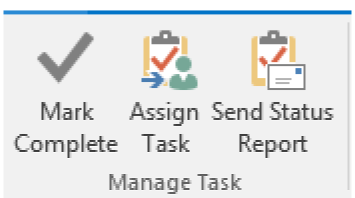


5. Click **Save & Close**.

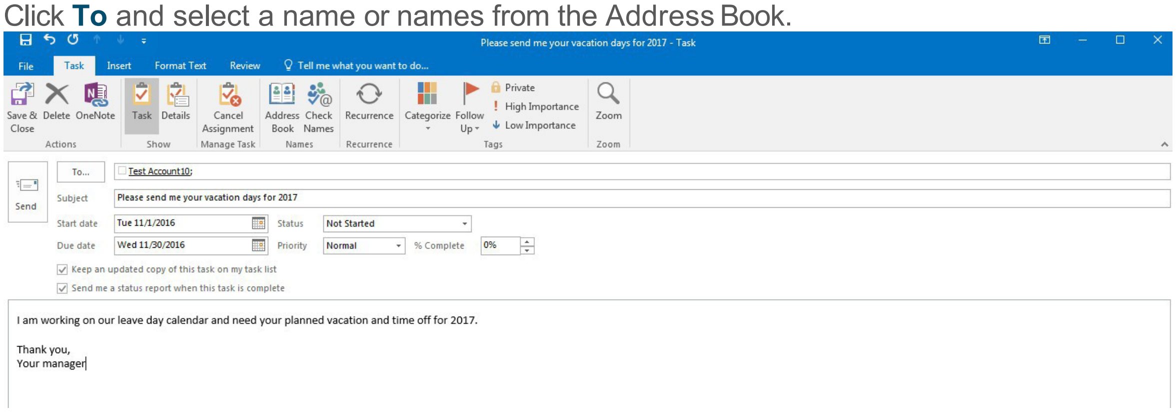
Assign a Task

The main benefit of using Outlook to assign tasks is that you can receive status reports on assigned tasks and view these status reports in your Tasks folder. Also, the activities of sending task requests and processing responses to those requests is automated.

1. To assign a task to another user, click **Assign Task** in the **Manage Task** group once you have created the Task. Once accepted, the assignee will become the **Owner** of the task.



2. Click **To** and select a name or names from the Address Book.

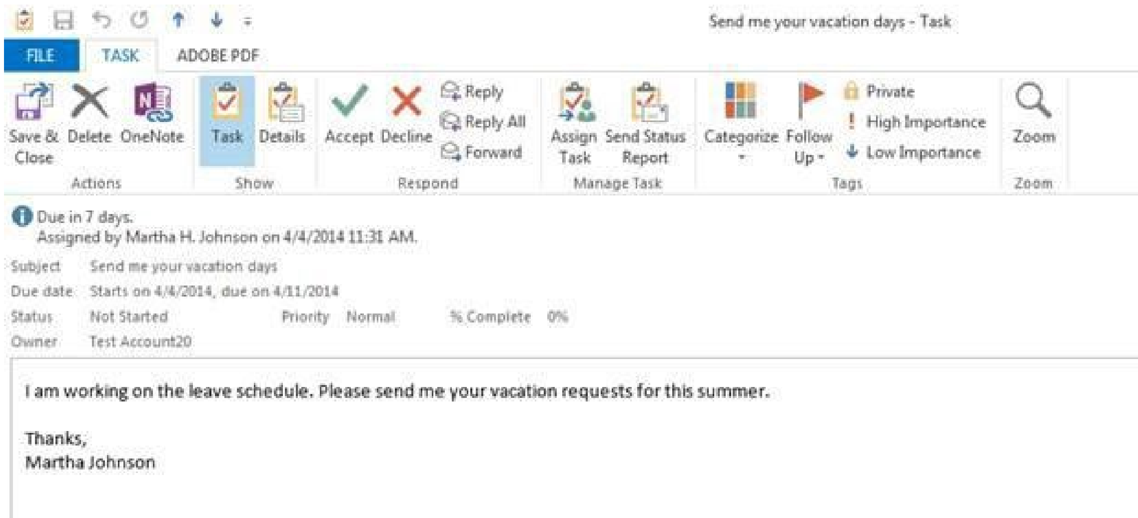


3. Click **Send**.

Quick Reference: **Time Management & Sharing**

Accept or Decline a Task From Another User

1. Open the task in either your Inbox or by double-clicking the line in your calendar.
2. Click **Accept** to accept the task and place it in your task list.

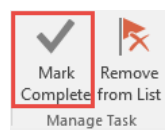


3. Add a **Priority** or **Category**, if needed.
4. Click **Decline** 

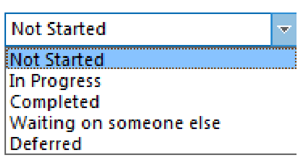
to delete the task from your Calendar. As a courtesy, be sure to send a message giving a reason.

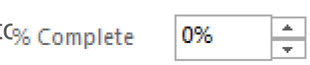
Mark a Task Complete

You can mark a task complete in several ways:



- Select the task and click the **Mark Complete** button on the Ribbon
- Select **Completed** in the Status drop-down list on the Task page



- Set the **% Complete** box to 

- About Task Ownership

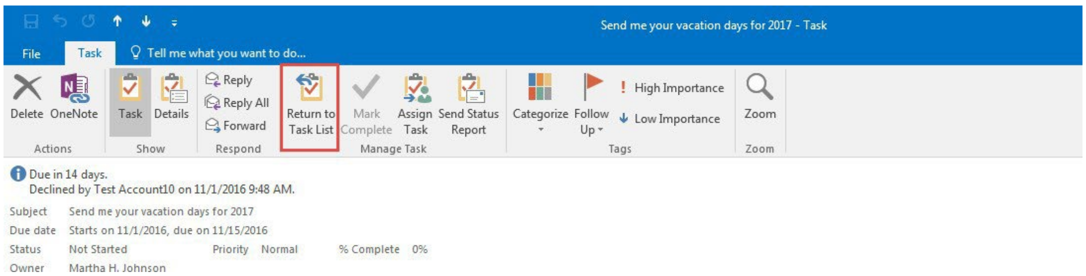
If you create a task, you initially own the task. Only a task's owner can make changes to the task. This means that the owner can modify the properties (the percent complete, the status, the start date, and so on) of all tasks that the owner creates and owns. When a task is assigned to someone else and that person accepts the task, the assignee becomes the owner of the task. The creator can then view the task's properties, but can no longer change them – only the current owner can make those changes.

Quick Reference: Time Management & Sharing

Reclaiming Ownership of a Declined Task

If a task you assigned is rejected, you will need to reclaim the ownership of the task if you plan on assigning the task to someone else or modifying and completing the task yourself.

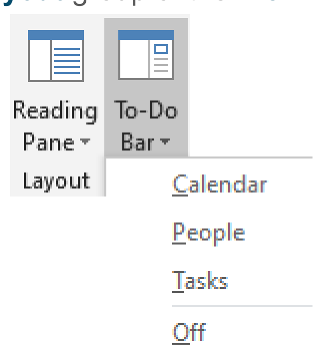
1. Open the message containing the declined task request.
2. Click **Return To Task List** on the **Task** tab of the **Ribbon**.



3. Click **Save & Close**.

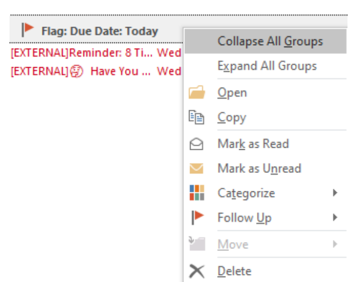
Work with Task in the To-Do Bar

The To-Do Bar (task list) is a feature that you can show or hide. The primary benefit of the task list is that it allows you to work with your tasks in a single window along with the other tools in view. To show or hide the task list in the To-Do Bar, choose **To-Do Bar** from the **Layout** group of the **View** tab, and choose **Tasks** from the menu.



You use the same methods to create a new task in the task list as you use to create tasks in the Tasks folder.

1. Right-click in the empty area of the task list.
2. Choose **New Task** or **New Task Request** (depending on whether you are creating the task for yourself or assigning it to someone else).



To change the task list view in the To-Do Bar, right-click in an empty area of the task list, choose **Arrange By**, and then select a view. You can also right-click on a column header in the task list and choose a view from the list.

NOTE

Applying a flag to a message or a contact makes the item appear in the To-Do Bar and in the Tasks view. Flags create a visible reminder that an action is due.

The To-Do Bar (and hence the task list) can be made visible in the **Mail**, **Calendar**, **People**, and **Tasks** folders. To change its settings or decide whether it is even visible, go to the **View** tab and select the **To-Do Bar** button. The drop-down menu will allow you to display any or all of the three sections of the To-Do Bar. You may want to customize the display of the To-Do Bar for each of the folders. For instance, you probably will not want to display the Task List while in the Task folder or the Date Navigator while in the Calendar folder.

Creating Rules

Because we are in an **Exchange environment**, Outlook can evaluate your incoming and outgoing e-mail messages and take various actions on them based on a set of instructions you set up, called **rules**. For instance, you might create a rule that tells Outlook to move all messages from a specific sender or with a certain subject into a specified folder rather than leaving them in your Inbox. These rules can be constructed with a myriad of parameters, such as the message sender, content, attachments, recipients, etc. Based on the criteria (conditions) you set, Outlook can automatically move, copy, delete, forward, reply to, and many other things. Keep in mind that you can define a rule to function either when a message is received or when it is sent. There is a collection of standard rules you can choose from or you can create your own from scratch. You also can import or export a set of rules.

There are two types of rules in Outlook — server-based and client-only.

- **Server-side rules** If you are using a Microsoft Exchange Server account, some rules that you create are server-based rules. These rules run on your **mailbox** on the Exchange mail server, even when Outlook is not running on your computer. The Automatic Replies (Out Of Office) is a good example of this.
- **Client-side rules** Client-side rules are rules that run only on your computer and are stored there. A client-side rule is needed when you're moving messages to a local folder instead of to a folder on the computer running Exchange. For example, if messages from a specific sender that arrive in your Inbox must be moved to one of your personal folders, the rule must function as a client-side rule because the Exchange Server is not able to access your personal folders – in fact, your computer might not even be turned on when a message arrives with that kind of criteria.

When you create a rule, Outlook examines its logic to determine whether it can function as a server-side rule or a client-side rule. If it can function as a server-side rule, the rule will be stored on the Exchange Server and run from there. If the rule must function as a client-side rule, Outlook stores it on your hard drive and appends the name of the rule with the words ***(client only)*** to designate it as such.

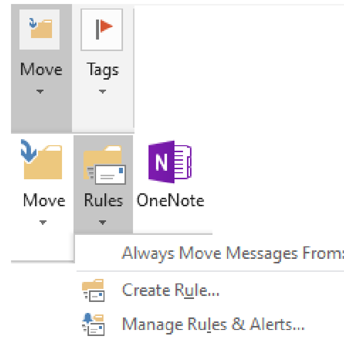
If your list of rules contains both kinds of rules, the server-based rules are applied first, followed by the client- only rules.

Quick Reference: **Time Management & Sharing**

Create a Rule from a Selected Message

Create a Rule to Move a Message from a Sender When Message Is Received

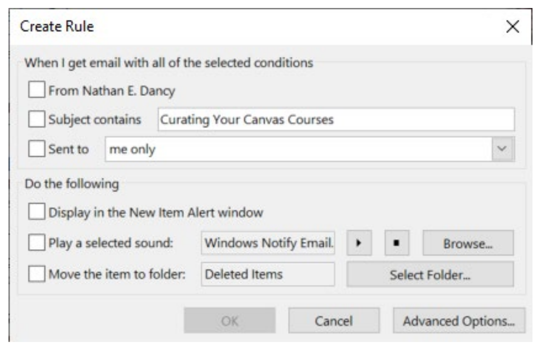
1. Click a message in the Inbox, and on the **Home** tab, click **Rules** in the **Move** group.
2. Click **Always Move Messages** From to move messages to a folder when they are received.
3. Choose a folder and click **OK**.



Create a New Rule for a Selected Message

You can create a new rule for the currently selected message with different actions other than just move when received, such as creating a rule based on the subject of the message.

1. Click the message in the Inbox.
2. Click **Create Rule** to open the **Create Rule** dialog box, offering properties based on the selected message; including sender, subject, and recipient.
3. Choose the criteria for your rule using any combination of the three, and then choose an action from the **Do The Following group** of controls.
4. Click **OK** to create the rule. Outlook will create a rule to move messages based on your selections.



Create New Rules Using the Rules Wizard

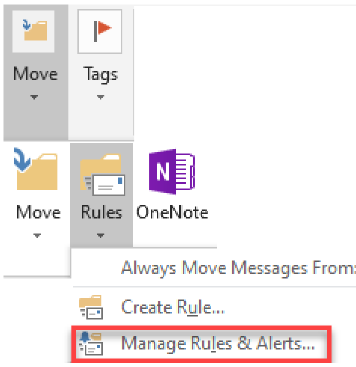
To create more complex rules, perform tasks other than moving messages, or create a rule that is not based on a specific message, use the ***Rules Wizard***. The wizard can be opened in a couple of ways:

Create a General Rule

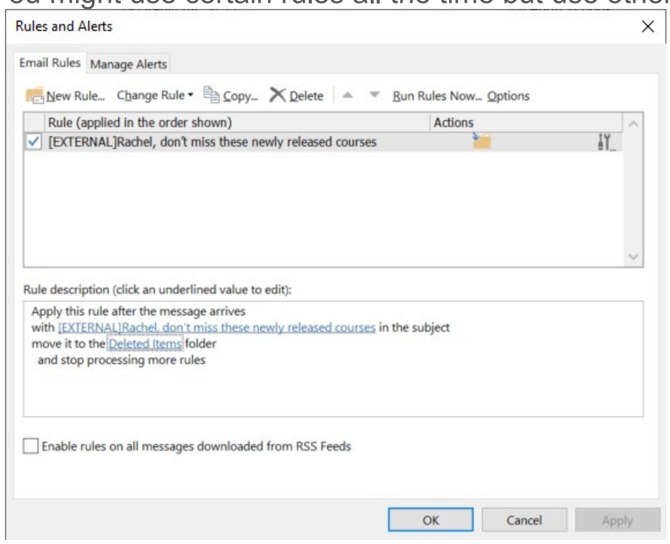
A general rule is one not based on a specific message.

1. On the **Home** tab, click **Rules** in the **Move** group.
2. Choose **Manage Rules & Alerts**. The Rules and Alerts dialog box, E-Mail Rules tab, shows all the existing rules that you have defined. Outlook applies these rules **in the order in which they are listed*,*** an important fact to consider when you're creating rules. Note there are re-sequencing arrows in the toolbar; also, you can select or de-select rules to put them into effect or to take them out of service.

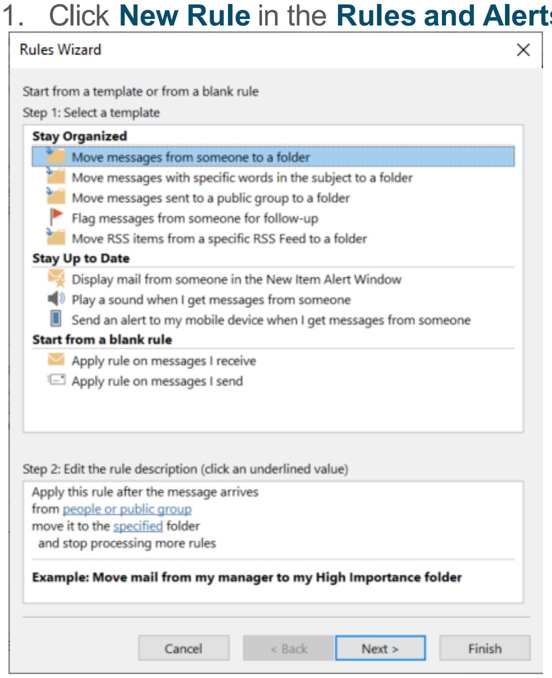
Quick Reference: Time Management & Sharing



You might use certain rules all the time but use others only at special times.



1. Click **New Rule** in the **Rules and Alerts** dialog box.



NOTE

When you create a message rule using the Rules Wizard, you must first specify whether you want to create the rule from a predefined template or from scratch. The templates can save you a few steps because they address common message processing tasks. If you decide to create a rule from scratch, you will set up all the conditions for the rule as you create it. With or without a template, you have full control over the completed rule and can modify it to suit your needs.

General Procedures for Creating Rules

1. Make sure the Inbox to which the rule applies is selected. This will only be necessary if you have more than one e-mail account operating in Outlook.
2. Specify whether the rule applies to messages as they are received or as they are sent.
3. Set the conditions that classify which messages are processed – sender, priority, content, attachment, etc.
4. Indicate the action to take when a message meets the criteria – move, copy, delete, generate a reply, etc.
5. Create other message rules to address other tasks, including those that might work in conjunction with other rules.
6. Set the arrangement of the rules to define the processing order, as needed.

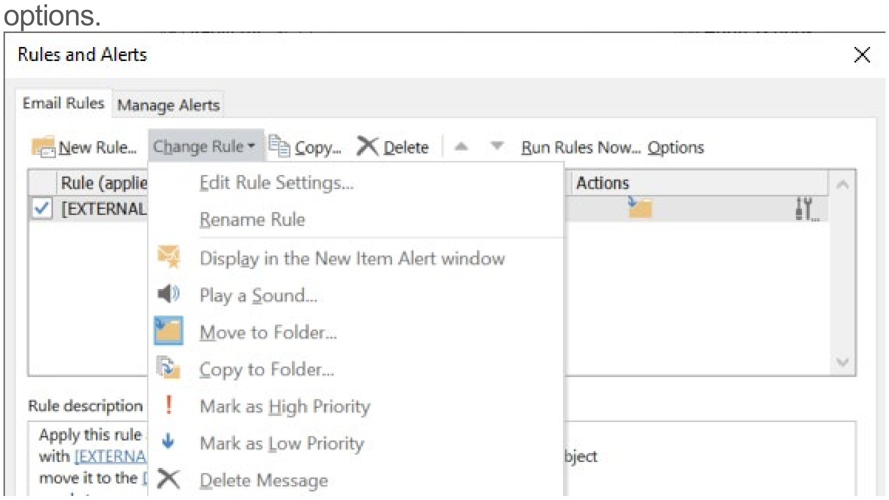
NOTE

If multiple conditions are set for a rule, the rule combines these conditions into a logical AND operation – in other words, the message must meet all the conditions to be subject to the rule. You can also create rules that use a logical OR operation, which says that the message is subject to the rule if it meets any one of the conditions.

Modify a Rule

Modifying a rule is much like creating one.

1. Click **Rules**, **Manage Rules & Alerts** to open the **Rules And Alerts** dialog box.
2. Select the rule to be modified and click **Change Rule** to open a menu of editing options.



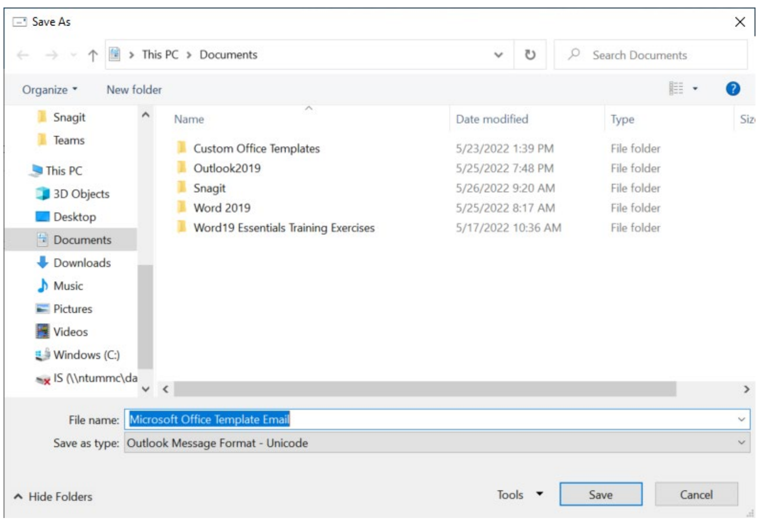
3. Select your choice and click **Edit Rule Settings…** to continue with the changes.

Outlook Templates

If you find you are sending the same message on a regular basis and have resorted to finding the previous message in your Sent Items, modifying it a bit, then resending it, you may find that using Outlook Templates might be a better solution.

Create an Outlook Template

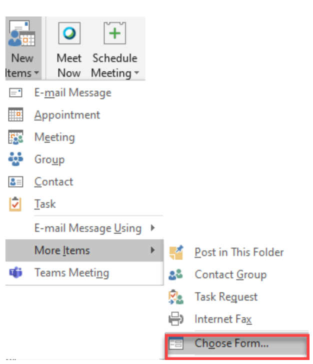
1. Create a message, placing everything in it that you would regularly send; text, addresses, attachments (if they do not change), etc. You can even set options like Read Receipts if you like.
2. Click the **File** tab of the message and click **Save As.**
3. Click the drop-down beside the Save as type: field and choose **Outlook Template (*.oft)**. Leave the location alone – you will want to use the default so that Outlook can easily find it later. However, the template will only be saved on the current computer. Give the template an easily recognizable name – type it in the **File Name** field.



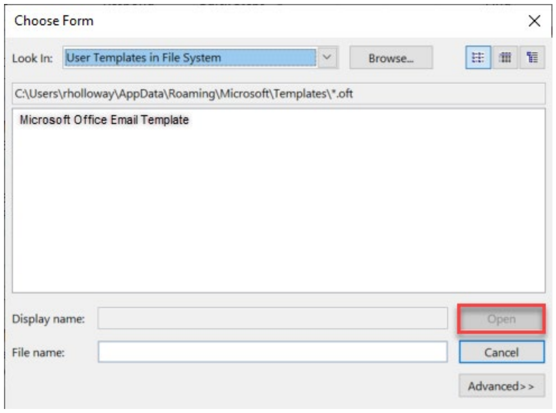
4. Click **Save**. Close the message and do not save it.

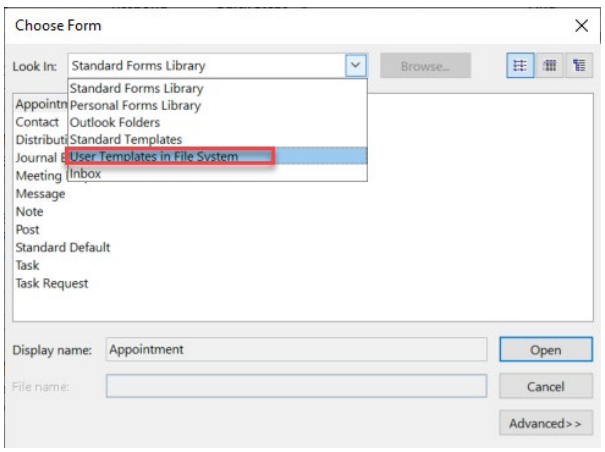
Use an Outlook Template

1. Click **Mail**. On the **Home** tab, select **New Items** from the **New** group.
2. Click **More Items** and then click **Choose Form….**



3. In the **Choose Form** dialog box, select **User Templates in File System** from the **Look In:** field drop- down.





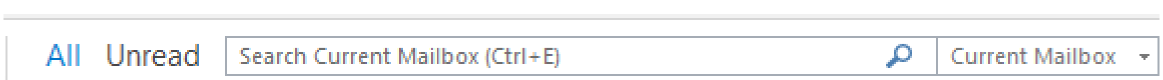
4. Click the template you wish to use and click the **Open** button.
5. Your saved template will generate a new e-mail form with the information you saved in the template. Add any e-mail addresses or other information and click **Send**.

Find Data in Outlook

It does absolutely no good to put things into Outlook if you cannot find them later. These next few sections will step you through the various features that allow you to search for your Outlook Data.

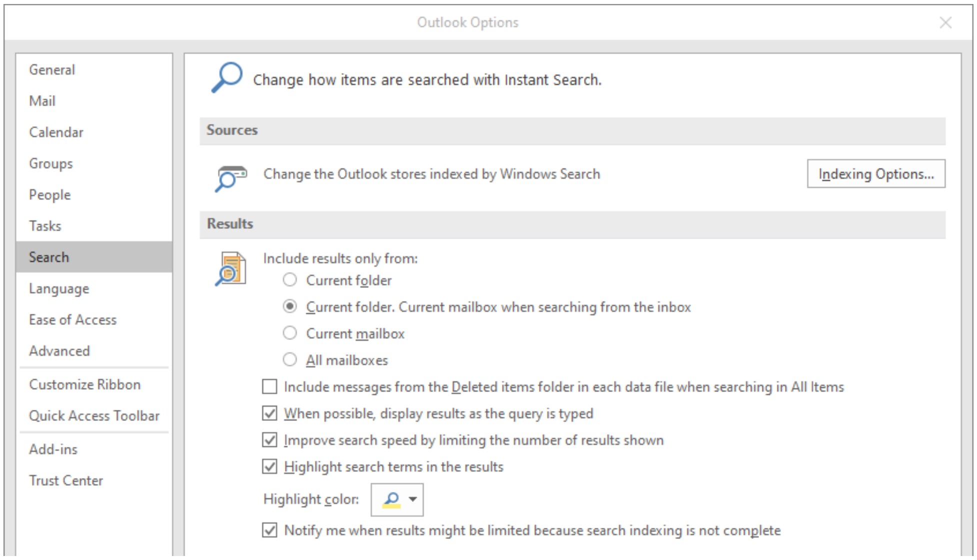
Use Instant Search

The **Instant Search** feature at the top of your item list provides a simple, unified search interface that is the same across all the Outlook folders.



No matter which folder you are in, Outlook will start display search results as you type in the Instant Search box, automatically filtering out older results when there are many items. By default, Outlook searches only the folder that you have open, but this setting can be changed. This default configuration should work in most circumstances; however, you might need to adjust some things to optimize your results.

To configure **Instant Search**, click the **File** tab, **Options**, and **Search** to display the **Search** page of the Options dialog box.



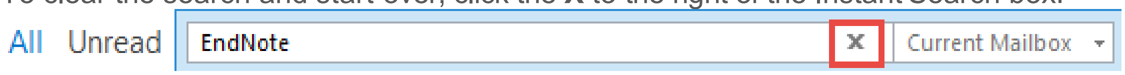
Search Options Available

- To have Outlook show you search results as you type, select **When possible, display results as the query is typed**. If this option is cleared, Outlook does not start searching until you click **Search** or press **Enter**.
- When your search has many results, Outlook 2019, by default, limits the number of items it displays by filtering for the most recent. To view all results of your searches, no matter the number, clear the **Improve search speed by limiting the number of results shown** check box.
- To have Outlook highlight your search terms where they appear in the results, select **Highlight search terms in the results.** You can also set the highlight color.
- If you want Outlook to search mail items that have been moved to the **Deleted Items** folder but not yet actually deleted, select **Include messages from the Deleted items folder in each data file when searching in All Items.**
- To set the default scope of Instant Search, under **Include results only from**, choose either **Current folder** or **Current mailbox**. This may be a setting that you turn **on** or **off** depending on your needs. More than likely, it will remain **off** most of the time.

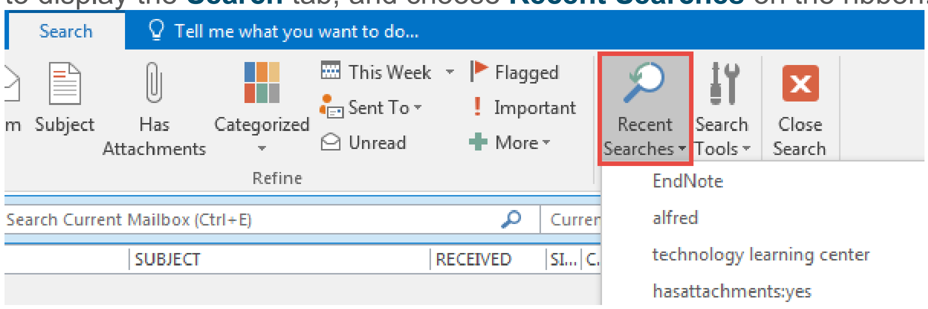
Quick Reference: **Time Management & Sharing**

Perform an Instant Search (WIth the Default Settings)

1. Click in the **Instant Search** box for the folder you are in and type your search text. Outlook will display the results as you type, with the search terms highlighted.
2. To narrow the results, type more text. To widen the results, delete some text.
3. To clear the search and start over, click the **X** to the right of the Instant Search box.



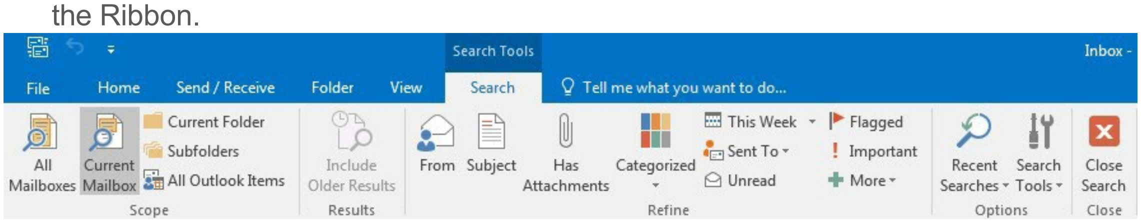
4. To repeat a search that you have performed recently, click in the **Instant Search** box to display the **Search** tab, and choose **Recent Searches** on the ribbon.



NOTE

Remember that searches also look in an item's attachments. This means that sometimes a search may include an item that does not seem to belong – the search term may be contained in the attachment.

5. To refine your search, click in the **Instant Search** box and take notice of the items in the Ribbon.

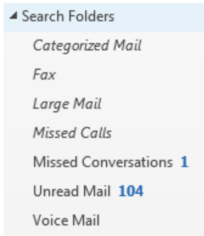


The **Refine** group on the **Search** tab will show you several extra fields that you can search within to refine your results. Each type of folder will display its own commonly used fields for that type of folder, so each one will show a different list of fields by default. You can also add fields to allow your searches to give you exactly the data you want.

Find and Organize with Search Folders

Functionally, a **search folder** is not really a folder at all, but rather a special view that functions like a separate folder. In effect, a search folder is a saved search. You specify conditions for the folder and Outlook displays those messages that meet the conditions in that search folder view. The messages continue to reside in their respective folders, although they appear to have been moved to the search folder.

There is a Search Folders branch of the Folders List which contains a few default search folders, such as:

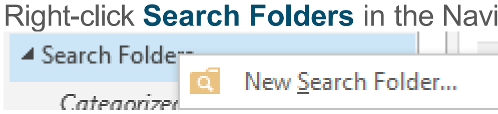


- **Categorized Mail** – shows all messages that have categories assigned to them
- **Unread Mail** – shows all messages that are unread
- **Large Mail –** shows mail larger than 100 KB

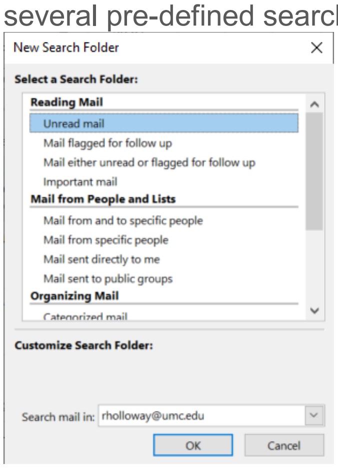
These default folders can be customized by right-clicking on the folder and choosing **Customize This Search Folder** to open the Customize dialog box where the criteria can be modified.

Create a New Search Folder

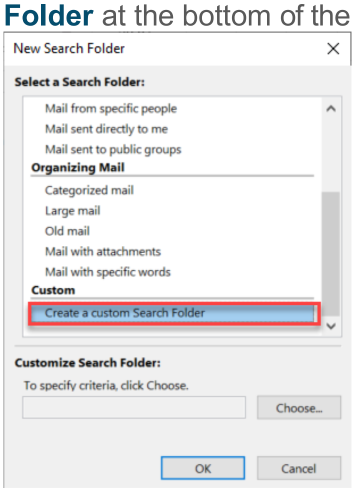
1. Right-click **Search Folders** in the Navigation Pane.



2. Choose **New Search Folder**. The New Search Folder dialog box opens, offering several pre-defined search folders.



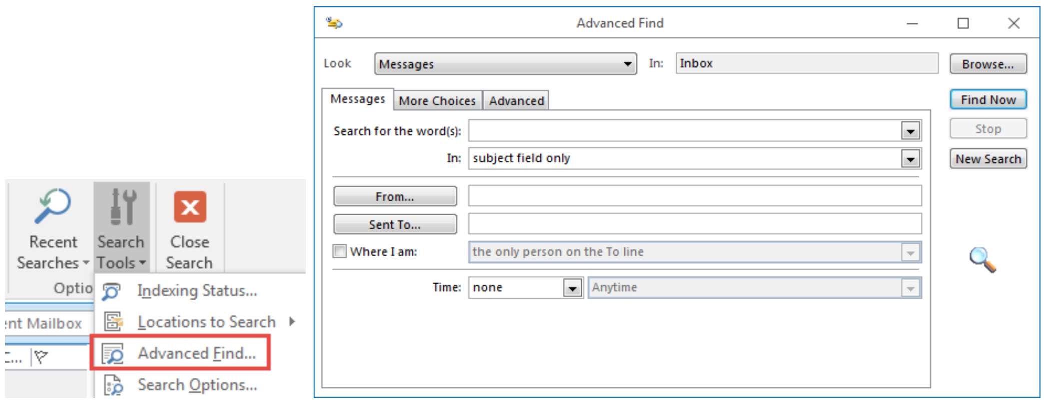
3. Choose one from the list and customize it or choose **Create a custom Search Folder** at the bottom of the list and create your own.



Use Advanced Find

Outlook still provides the **Advanced Find** feature as it has for quite some time now. This feature allows for advanced searches requiring multiple search conditions.

1. To open the **Advanced Find** dialog box, click the **Instant Search** box.
2. Click the **Search Tools** tab**, Search Tools**, and click **Advanced Find**. You may also use the key combination of CTRL+Shift+F



This dialog box can be used to search for any type of Outlook item using multiple search conditions. The options found in the dialog box will change based on the type of item that you select in the **Look For** drop- down box.