

Technology and Tools

Time Management

Microsoft Outlook Basics to Manage Your Days

- Email management
- Calendar management
- Task management

Technology allows the virtual work environment to exist. Let's take a look at Microsoft Outlook, an application that is available to you. It can help you to work more efficiently by helping you manage your time and stay organized.

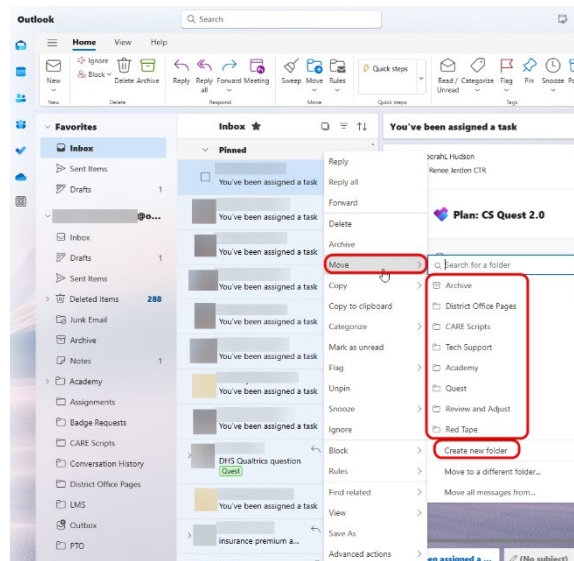
Microsoft Outlook is not just a vehicle for email. This application contains many features to help organize and prioritize your email, calendar appointments, and tasks.

Email Management

- Creating folders
- Setting rules

Let's talk about two tools that can help you organize and prioritize your emails. They are creating folders and setting rules.

Creating Folders



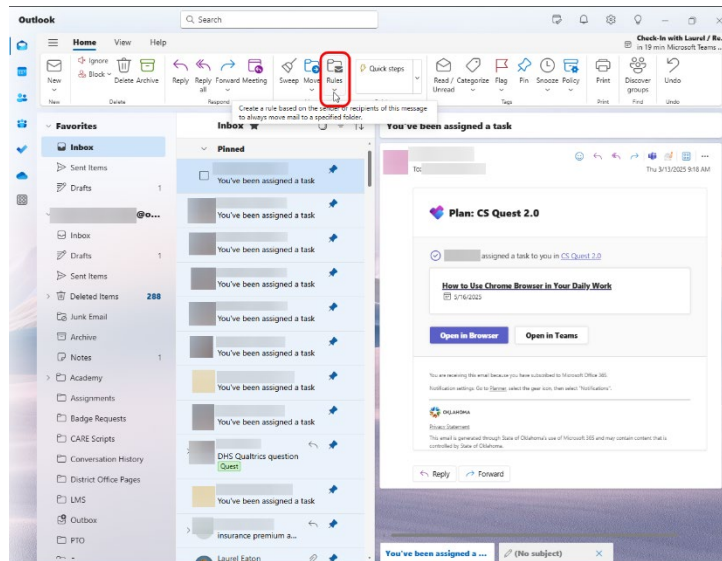
Creating folders can help you organize your e-mails. You can create folders for specific individuals and move e-mails from these individuals to these folders. You can also create folders by category, topic, or events, and move e-mails for quick retrieval . Some examples of folders by category may be policy, meeting minutes, vehicle modification, billing, referral process, plan development, and administrative information.

If personal folders are permitted on your system, you can also create these to store e-mails you would like to keep. If you need assistance setting up personal folders, ask a coworker or your supervisor; or, you can also contact your IT Support Contact at the Indiana Office of Technology (IOT) if you experience a technical issue.

To create a new folder, right-click the email you wish to move into the new folder. Click Move. You can then either move the email to a folder that already exists or create a new folder.

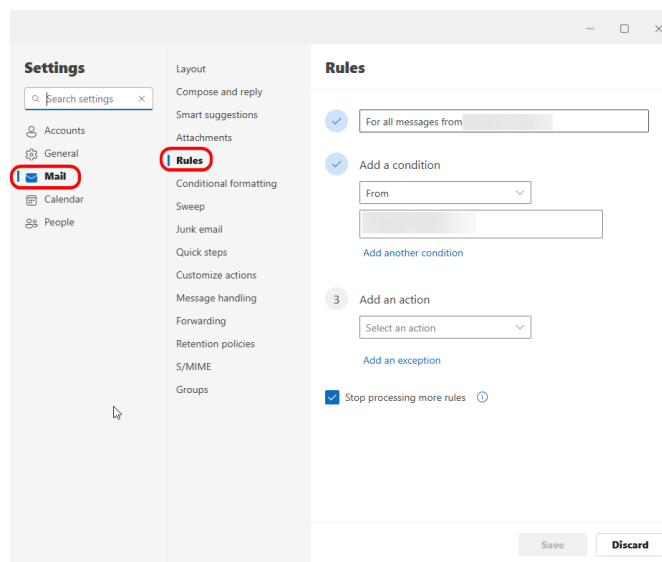
Once folders are created, they appear under the folder they were created in on the list in the left side panel on the Mail screen. You can move e-mails to the folders manually, or set a rule for e-mails to be placed in the folder automatically.

Setting Rules



You can set rules to recognize incoming e-mails and place them in folders automatically.

To start, click the Rules drop-down menu from the Mail screen.



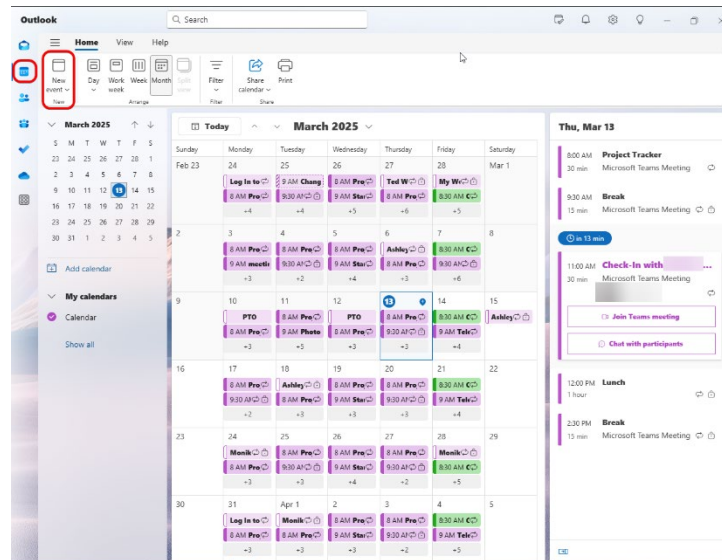
Select the Create Rule option and follow the steps in the dialog boxes.

Calendar Management

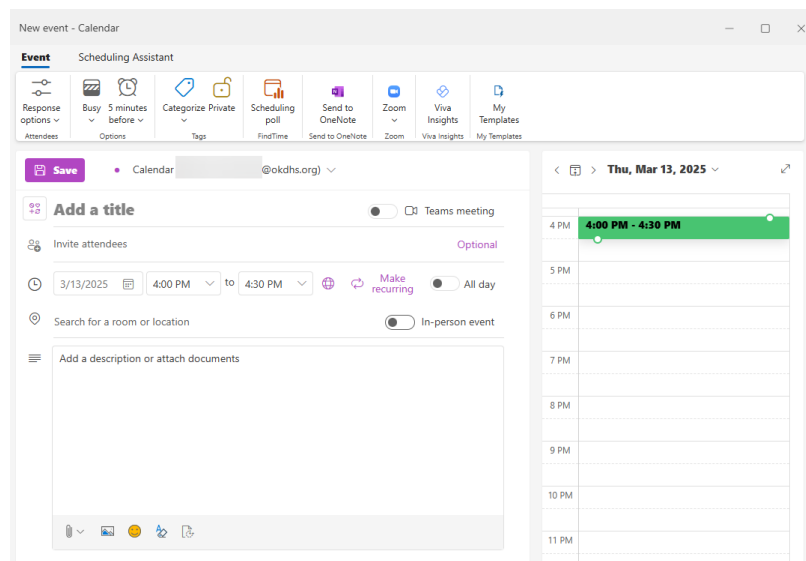
- Setting up an event/appointment
- Updating and deleting an event

Next, we will cover some basic calendar features to help you stay organized. We'll quickly cover how to set an appointment and how to update and/or delete an appointment.

Setting up an Event



From the calendar view in Outlook, click the New event drop-down menu and click Event.



The New event screen appears. Type in the event title, attendees, date, and time. You can also add a description or instructions in the white panel of the screen. Click the Save button. The event appears on your Outlook calendar.

If you invite attendees, they will receive an e-mail with the event request. They can accept or decline the event, and you will receive notification of their attendance status.

To update a meeting, double-click on the event marker on your Microsoft Outlook calendar. The event screen will open. Make the necessary changes to the event and click the Save & Close button. If you want to remove the event, click the Delete button.

If you invite others to the event and make changes to the event, the event attendees will receive notice of the update.

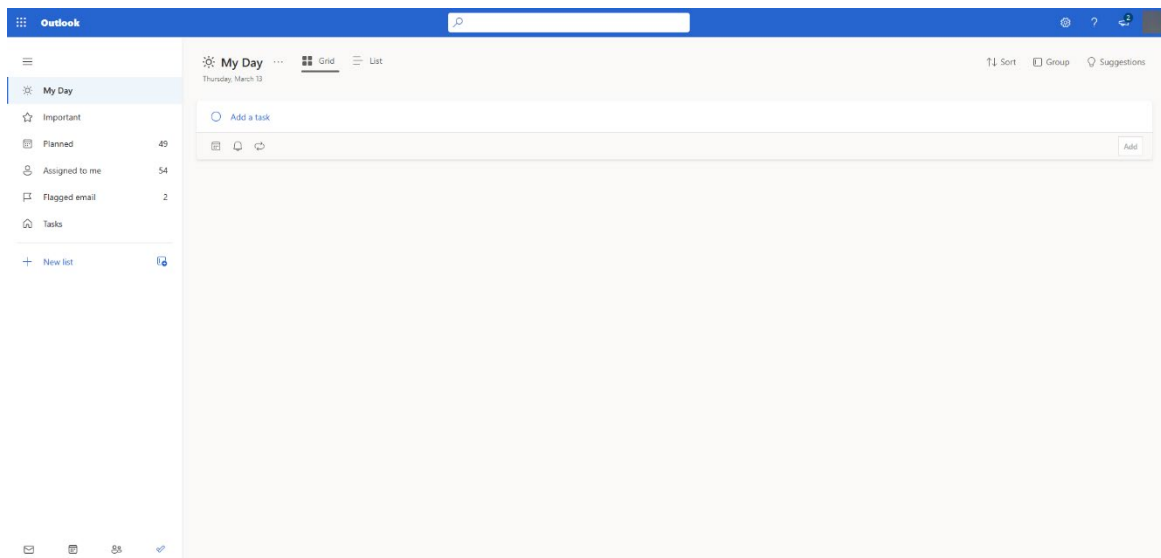
Task Management

- Entering
- Color Coding

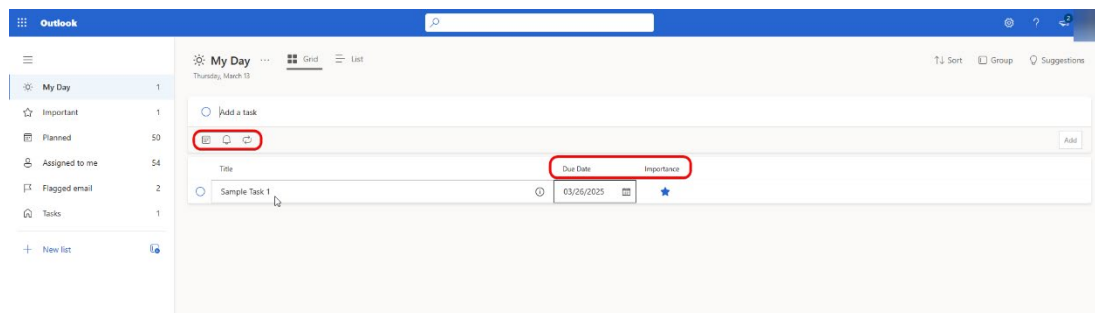
Entering tasks in Outlook can create an electronic “to do” list. Tasks can also be color coded to help prioritize or categorize them.

You can also flag e-mails and move them to your task list to help you remember to respond to them.

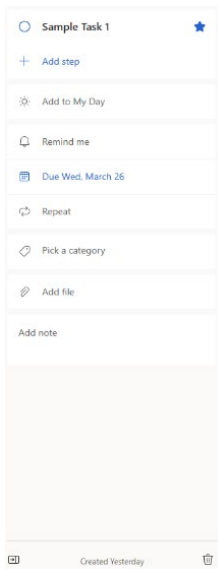
Entering Tasks



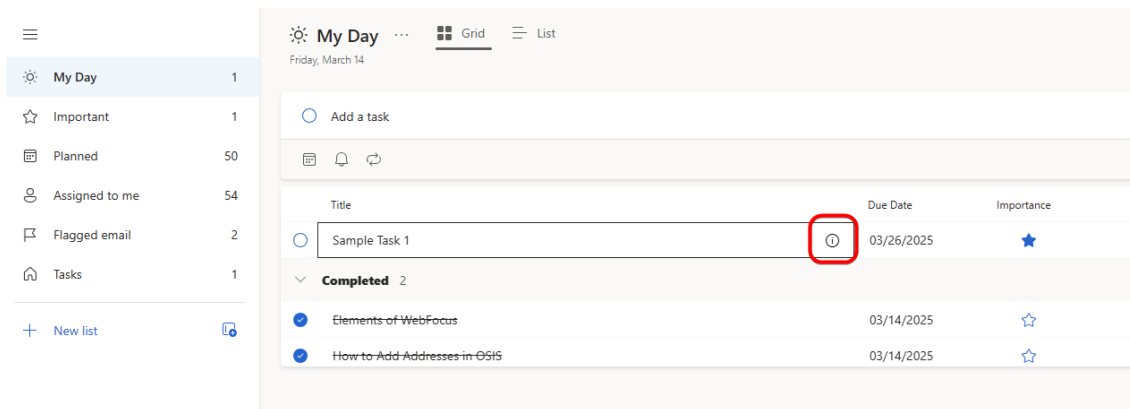
To add a new task to your to-do list, click to open the To Do view in Outlook. This will open a new window to the To Do Office app.



Click Add a task. This will give you the typing cursor to title your task. You can also add a due date, set up notifications, or set the task to repeat. Press Enter and you can now also give your task a priority level.



Right-click the task and get even more options for your task. You can choose a category, attach a file, add notes, and create steps to follow to help complete your task. Click Add to My Day to ensure it appears on your daily tasks list for the day.

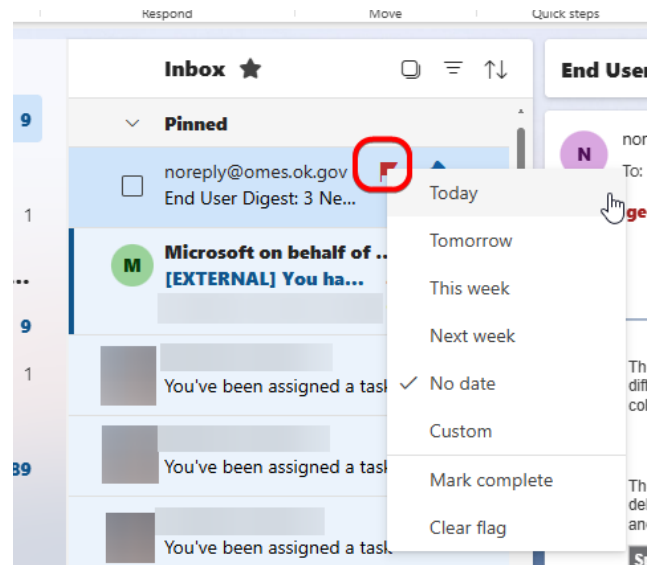


Click My Day on the left panel. If you have added additional information to your task, there will be a small circle with an "i" in it. Click on it and it will show you that additional information.

Here's a helpful tip: you can color-code e-mail and calendar items too. Right-click the e-mail or calendar item and click Categorize.

You can also use your task list to help you keep track of e-mails that require responses or actions. Let's see how.

Flagging Emails



Simply highlight the e-mail that you want to flag. Right-click the Flag icon on the Outlook tool bar, and select when you want to follow up on the e-mail. The e-mail will appear on your task list with the day you selected to complete the follow-up.