

# Outlook 2003 Quick Resource Guide

## Trim The Email Fat: ACT

### COLOR CODE INCOMING EMAILS FOR ALERTS

1. In your Inbox view
2. Go to the Tools Menu
3. Click the Organize Button (square yellow button)
4. Select "Using colors" (second tab)
5. Select an Email from a particular person
6. Select a color from drop down menu
7. Apply color

### MOVE ACTIONABLE EMAILS TO TASK LIST

1. Select Email
2. Right click and hold
3. Drag to the Task icon
4. Select "Copy with attachment" or "Move with attachment"
5. Rename the subject line to begin with a verb.
6. Select a due date and priority if appropriate

### STORE SUPPORTING INFORMATION WITHIN A TASK

1. In the Note section of a task, click "insert" from the toolbar
2. File = My documents (Word, Power Point or Excel)
3. Item = Email from Inbox or Personal Folder List
4. Object = graphic

### CREATE STEPS WITHIN A TASK: MINI PROJECT OR GOAL

1. Open a new task
2. In Notes section list each step within the project or goal
3. Select your next do-able action step
4. Identify due date and priority
5. Save and close
6. Once completed, open task again
7. Select next step: rename subject with the next step
8. Change due date and priority
9. Save and close.
10. Repeat process until project or goal is completed

### BREAK DOWN A LARGER PROJECTS TO CATEGORIES

1. Open a new task
2. In the subject line, identify your next do-able step
3. Click the "Category" box in lower right-hand corner
4. Choose from available categories
5. Or click "Master Category" list to add your own
6. Other tasks associated with this project can be categorized accordingly
7. View all tasks within a category by clicking

### DELEGATE VIA TASK LIST

1. Open a task
2. Identify task in subject line
3. From the toolbar or "Action" drop down menu, select "Assign task"
4. Select "To" and choose from your contact list
5. Check "Keep an updated copy of this task on my Task List"
6. Create due date and priority
7. Send it

## Email Best Practices

### TURN OFF YOUR ALARM FEATURE

In Outlook on the Tools menu,

1. Select Options
2. Select Advanced Email Options
3. Uncheck the box "Play a sound when an Email arrives"

### USE "VOTING" FOR QUICK RESPONSE

1. Open a new Email message
2. Click "Options" button from toolbar
3. Click "use voting button"
4. Within "Voting and Tracking Options" select "Use Voting Buttons"
5. Select from drop down menu or insert your own options separating each with a semi-colon
6. Explore other valuable tools within this "Message options"

### ADD A PROFESSIONAL "SIGNATURE"

1. In your Inbox screen, select "Tools" menu
2. Select Options
3. Select Mail format
4. Select Signatures
5. Select New
6. Enter name for your signature
7. Follow prompts

### USE RULE WIZARD TO PROCESS EMAILS

1. Select an Email you want to create a rule for by right clicking on it
2. Click "Create a Rule"
3. The "Create a Rule" box will appear
4. In the section titled "When I get an Email with all of the selected conditions"
5. Check one or more of the following options:
  6. "From" (Sender's name will be displayed)
  7. "Subject contains" (Subject line will be displayed)
  8. Or "Send to" (Me only will be displayed)
9. In the section titled "Do the following," Check "move an Email to certain folder"
10. The default is Junk Email folder.
11. To choose another folder click "Select Folder," your Outlook Personal folder list will appear
12. Select OK
13. Select "Run this rule now on messages already in the current folder."
14. Select OK

- Be careful when forwarding message with the Rules Wizard. All meeting related message must arrive in the Inbox to auto process.
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- Amgen policies disallows use of an Outlook Rule to forward your mail to an outside Internet Service Provider or web based Email provider (such as Hot Mail).

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## Contact Management

### GATHERING EMAIL ADDRESSES

1. Select Email and drag to contact icon
2. Outlook will capture contact's name, Email address, and "File as"
3. Many individuals have a signature that contains all other relevant information
4. Highlight information and drag to appropriate field (no need to cut and paste)

### ADD CATEGORY TO DISTINGUISH FROM OTHER CONTACTS

1. Click the "Category" box in lower right-hand corner
2. Choose from available categories or click "master category" list to add your own
3. View contacts within a category by manipulating contact view:
4. Go to View Menu
5. Select "Arrange by"
6. Select "By category"

### SEND EMAIL TO AN ENTIRE CATEGORY OF CONTACTS

1. Select your contact list
2. Go to View Menu
3. Select "Arrange by"
4. Select "By category"
5. Scroll to appropriate category
6. Highlight 1<sup>st</sup> contact name in that category
7. Hold Shift and highlight last name in that category
8. Select Action button
9. Select "New message to contact"
10. The entire selection of names will be entered in the "To" field a new Email message

### MANIPULATE THE CONTACT LIST VIEW

1. Select View button
2. Explore "Arrange by" options
3. Select view which enables you to quickly find your contacts information

### ELECTRONICALLY MAP A CONTACT LOCATION

1. Select the Yield Sign (yellow button) on the Tool Bar
2. Outlook will "map" the address on an online mapping site
3. You can select "directions to, from this location..."

### ADD BIRTHDAY OR SPECIAL EVENT TO CONTACT

1. Open a contact
2. Select the Details tab
3. Enter birthday or special day in the Anniversary spot
4. Save and close

## Calendaring Techniques

### CREATE AN APPOINTMENT RECEIVED VIA EMAIL

1. Select Email and drag to calendar icon or the word "Calendar" in your folder list
2. Change subject line to appointment name
3. Select date, time, etc.
4. Save and close

### CREATE A RECURRING APPOINTMENT

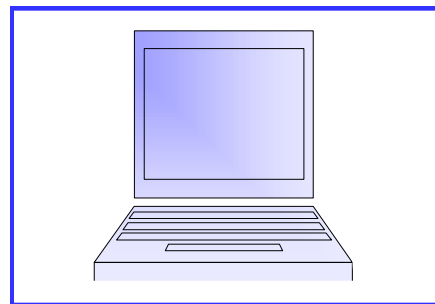
1. Within an appointment, select *Recurrence* from toolbar.
2. Select applicable options.
3. Show how to mark appointment "private" by clicking in the box on the lower right.

### COLOR CODE APPOINTMENTS

1. In your Calendar
2. Select Edit from the toolbar
3. Select Label
4. Select Edit Labels
5. A list of pre-labeled colored boxes will appear
6. Highlight any color and type a label name, i.e. Conference calls, meetings on campus but in another building, travel...

### STORE RELEVANT INFORMATION WITHIN AN APPOINTMENT

1. In the note section of the appointment,
2. Click Insert from the toolbar.
3. File = My documents (Word, Power Point or Excel).
4. Item = Email from Inbox or Personal Folder List.



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