

Sabella's Outlook Tips

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E-mail

1. In Microsoft® Outlook you can **find all related messages** to one that you sent or received relating to a "conversation." To do this right click on any message in your message list and chose Find All > Related messages.
2. **Forward a contact** to someone: Insert on the menu, then Item, navigate over to Contacts, choose the contact you want to forward, make sure Insert as Text Only is turned on, click Okay. The contact info will be pasted into your e-mail as text. A big time saver.
3. **Use e-mail merge to send pesonalized emails!**



Create a Simple Mail Merge

1. Open the Contacts folder and set up your filtering criteria (View the "Define the Criteria" section below).
2. On the Tools menu, click Mail Merge. If Mail Merge is not visible, hover the mouse pointer over the chevrons at the bottom of the menu. After a couple of seconds, all of the menu options will be visible. Click Mail Merge; it will be available from now on.
3. In Mail Merge, click to select the appropriate options, and then click OK. Word will be started and the Word Mail merge toolbar will be visible. From this point on you will be working in Word.
4. Type your letter, and then click Insert Merge Fields to reveal the Outlook contact fields. Click to select the fields one at a time to place them in your document.
5. Once the merge fields have been placed in the document and the letter is finished, on the Tools menu, click Mail Merge, and then click Merge, or click the appropriate merge button on the toolbar, such as Merge to New Document, Merge to Printer, or Mail

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Merge. If you merge to a new document, you can save the new document for later use.

4. **Recall a message:** Every now and then I send an e-mail that I regret. Is there any way to get it back or unsend it? Maybe you can. If you use Microsoft Exchange Server as your e-mail server, and the recipient uses Outlook, you can recall the message before the person has a chance to read it:
 1. Open your Sent Items folder.
 2. Double-click the message you want recalled.
 3. On the Actions menu, click Recall This Message.
 4. To recall the message, click Delete unread copies of this message. To replace the message with another one, click Delete unread copies and replace with a new message, click OK, and then type a new message.
 5. To be notified about the success of the recall or replacement for each recipient, select the Tell me if recall succeeds or fails for each recipient check box.
 6. Click OK.
5. **Voting:** Microsoft Outlook with the Corporate Workgroup/Other or Exchange Server option (ask your IT folks), you can send survey-type messages with voting buttons to a group of recipients. By clicking a button, each respondent can express a preference and generate a response message to vote. Outlook logs Vote messages to the original message's tracking page. See an article at <http://support.microsoft.com/?kbid=197420> that describes the conditions and requirements for proper operation of the Voting feature. This feature works best if you have only one question per e-mail.
6. **Flag an E-mail for Follow-up.** As you make your way through your inbox, you encounter an e-mail that requires follow-up. Flag the e-mail with a Microsoft Outlook Flag. The next time you're reading an e-mail that requires follow-up:
 1. Right click over the message.
 2. Select Follow Up
 3. Select a reason from the drop-down Flag to: list (e.g., call, read, forward)
 4. Select a Reminder date. (Optional, but I strongly encourage it.)
 5. Click OK.
7. **Sort e-mail messages** using grey bars above the messages. And, Use

Automatic Formatting to make certain messages stand out with color. Once you select a message and click the Organize command on the Tools menu, you're just a few quick steps away from color-coded messages.



8. Use an e-mail to **hold your phone messages**. Edit that original message as you need to (Right click, edit original message). Put a follow up flag on it for easy reference.
9. **Saving All Attachments.** When you receive an attachment in Outlook 2002, you can save it to your computer. When you receive an e-mail that has multiple attachments, you can open the message and save each one individually. You also have the option of saving all the attachments at the same time, eliminating the need for you to save them one at a time.
 1. Within Outlook, select the e-mail message that contains the attachments.
 2. Click File, point to Save Attachments, and click All Attachments.
 3. The Save All Attachments window will appear where you can pick the attachments you want to save (use the CTRL button to select multiple attachments).
 4. Click Ok.
 5. Browse to the folder where you want to save all the attachments and click OK.
10. **Send mail in RTF format**
 - a. Actions
 - b. New Mail Message Using ...
11. **Use templates for common message (e.g., about your program).**

Contacts

1. **Find a Contact While Reading an E-mail.** You can look up information about a contact from an e-mail message. The contact must be in your original contact list.
 1. Right click on the person's name in the To, Cc, or Bcc boxes of the e-mail

message.

2. Click Look up Contact on the shortcut menu.

Similarly, you can add someone to your address book very quickly by choosing Add to Contacts in step #2.

Calendaring

1. Q: Using Microsoft Outlook, how do I set up a **re-occurring reminder** for myself (e.g., to back up my computer once per month).

A: To set up recurring tasks:

1. Open your Outlook Calendar.
2. Click the Actions menu and click New Recurring Appointment.
3. Under the Appointment time section shown in the figure, select a Start time.
4. Configure the End time to be the same as the start time.
5. Set the duration to 0 minutes.
6. Under the Recurrence pattern section, select the desired options.
7. Click OK.
8. Type in a name for the reminder.
9. Click Save and Close.

2. **Jump to a Date.** To jump to a particular date in your Outlook calendar, select Go | Go to Date from the Outlook menu, or press Ctrl+G to open the Go To Date dialog. Select the date you want from the calendar, or instead of choosing a date, type text describing the date. For instance, type "Last day of the month," or "fourth of July," or even "New Year's Eve" to jump there.

To return to Today, select Go, then Today from the Outlook menu, or click the "Today" icon on the toolbar.

3. When multiple people need to attend a meeting, not all the individuals need to enter the event into their respective calendars. One person can do this and then e-mail the event to the others. This can be done in three different ways:

- a. After entering the meeting or event, click on Invite Attendees. Input their e-mail addresses or use a distribution list. When recipients receive their invitation, they can either automatically schedule the event or click a button to add it to his/her calendar (depending on how their program is customized).
- b. Click on the colored strip next to the event in Calendar View and press Control-F.

An e-mail with an attachment of the event will be ready for sending. When the recipient receives the e-mail, he or she only needs to click on the attachment which brings up the calendar event and click on Save and Close.

- c. If you are using a Handheld device, consider having one person write in the calendar event and "beam" it to the others in the room. Just for fun, start a beaming daisy chain.
4. **Adding Holidays to your Outlook Calendar.** By default, Outlook does not display holidays on the calendar. Most people prefer having holidays listed in their calendar for reminders, planning work schedules, deciding upon holidays, and so on. If you want holidays listed, you can add country specific holidays to your calendar.
 1. From the Outlook tools menu, click Options.
 2. On the Preferences tab, click Calendar Options as shown in the figure.
 3. Click Add Holidays.
 4. Place a check beside the appropriate country/countries.
 5. Click OK.
 6. Click OK to close the Calendar Options dialog box.
 7. Click OK to close the Options dialog box.
 5. Use **natural language** (e.g., 2nd Monday in October).

Other

1. Send others calendar information by dragging the appointment to the e-mail button on the left side.
2. Opening Multiple Windows in Outlook: If you want to have multiple windows open in Outlook (e.g., Inbox and Calendar), right-click on the new item and select Open in New Window. This makes it a lot easier to cut and paste between Outlook applications.
3. I have discovered quite a gem of a program that is relatively inexpensive and has saved me tons of time with entering both calendar and contact information. It's called anagram (<http://getanagram.com>). anagram™ is a tiny and unobtrusive program for your PC that stays out of your way while you work, but is available at a single keypress when needed. The program instantly and intelligently translates the meaningful text from any application into Outlook® Contact,

Calendar, Task and Note items (that's right, you just highlight the text and anagram figures out what it is and then puts it in the right place).

4. Don't forget to **backup the stuff in your e-mail program**. For instance, if you use Outlook 2000 or later version, you can download a free Add-in called **Personal Folders Backup** which creates backup copies of your .PST files at regular intervals, in Outlook 2000 and later versions, making it easy to keep all of your Outlook folders safely backed up (see <http://tinyurl.com/4xwnh>). Or, use the **Archive feature** in Outlook to archive all the emails in your Sent folder (see <http://tinyurl.com/3n3vg>).
5. **Use folders!** Right-click Inbox. Click New Folder.
6. **Viewing Web Pages in Outlook.** Instead of having to open your browser to view a website you previously visited, you can open the web site directly in Outlook. Using the Address Bar in Outlook, you can open a web page and it will appear right in Outlook. This is definitely a simple and quick way to access a web page.
 1. Within Outlook make sure the Web toolbar is visible. To do so, click View, point to Toolbars, and select Web (there should be a check beside this option).
 2. Once the Address Bar is visible, click the down arrow and select the web page that you want to open.
 3. Optionally, you can also type in the URL of the web site you want to visit.
 4. Press Enter or click the Go button.

The web page will automatically appear within Outlook. You can return to the previous folder view at anytime by pressing the Back button. For example, if your inbox was visible just press the Back button to return to it.

7. Use Google Desktop search to search for emails, contacts, etc. ... (desktop.google.com).
8. Use e-mail extractor (<http://coe.fgcu.edu/faculty/sabella/extractor.htm>)