UFHealth
INFORMATION TECHNOLOGY TRAINING

Office

Microsoft Outlook How do I…?

training@health.ufl.edu

Microsoft Outlook - How do I…?

1.0 hours

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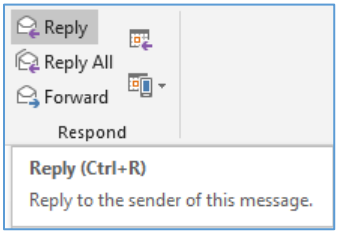
Common Shortcuts

When you hover over a button, it will often give you the shortcut keys in the Screen tip. If you press the Alt key on the keyboard it will open the ribbon and show you further shortcut options.



These are the ones I found most useful. See the shortcuts handout for a more complete list.

Email

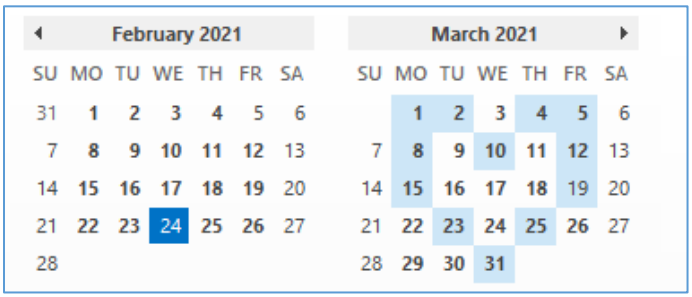
Ctrl-Shift-M	New email
Ctrl-R	Reply
Ctrl-Shift-R	Reply All
Ctrl-F	Forward
Ctrl-K	Check Names
Alt-S	Send
Ctrl-1	Switch to Mail view
Ctrl-.	Next Message
Ctrl-,	Previous Message ….(Think < and >)
Ctrl-E	Search box
Ctrl-M	Check for new messages

Calendar

Ctrl-Shift-A	New Appointment
Ctrl-Shift-Q	New Meeting
Ctrl-G	Go to Date
Next week	Alt-↓
Previous week	Alt-↑
Daily view	Ctrl-Alt-1
Work Week	Ctrl-Alt-2
Full Week	Ctrl-Alt-3

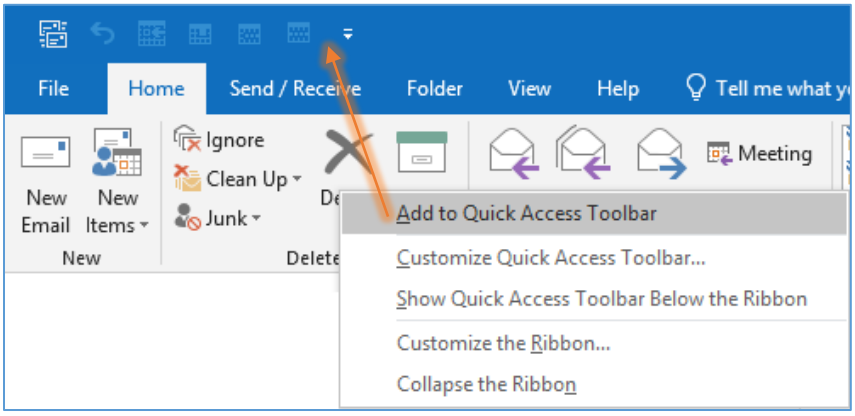
Select Multiple Dates

You can open the Navigation Pane on the left side of the window so it shows up to a full year. Click on a date and use the Shift key to grab Consecutive days. Use the Ctrl key to add and remove days from your selection.

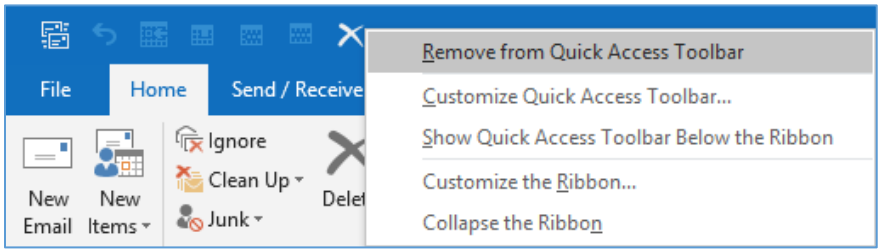


Add Buttons to the Quick Access Toolbar

The Quick Access toolbar is the area at the top of the window where the Save and Undo buttons live. You can right-click on any button and choose **Add to Quick Access Toolbar**.

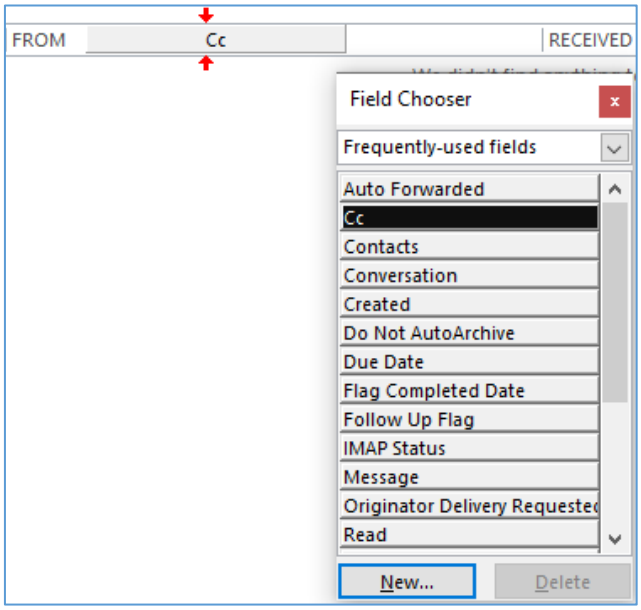


To remove the button, right-click on it in the Quick Access toolbar and choose Remove from Quick Access Toolbar.



Customize Columns in Mailbox

In your list of emails, right-click on any column heading and click on **Field Chooser**.



Drag the field you want to add into the title bar with the other column headings, watch for the red arrows.

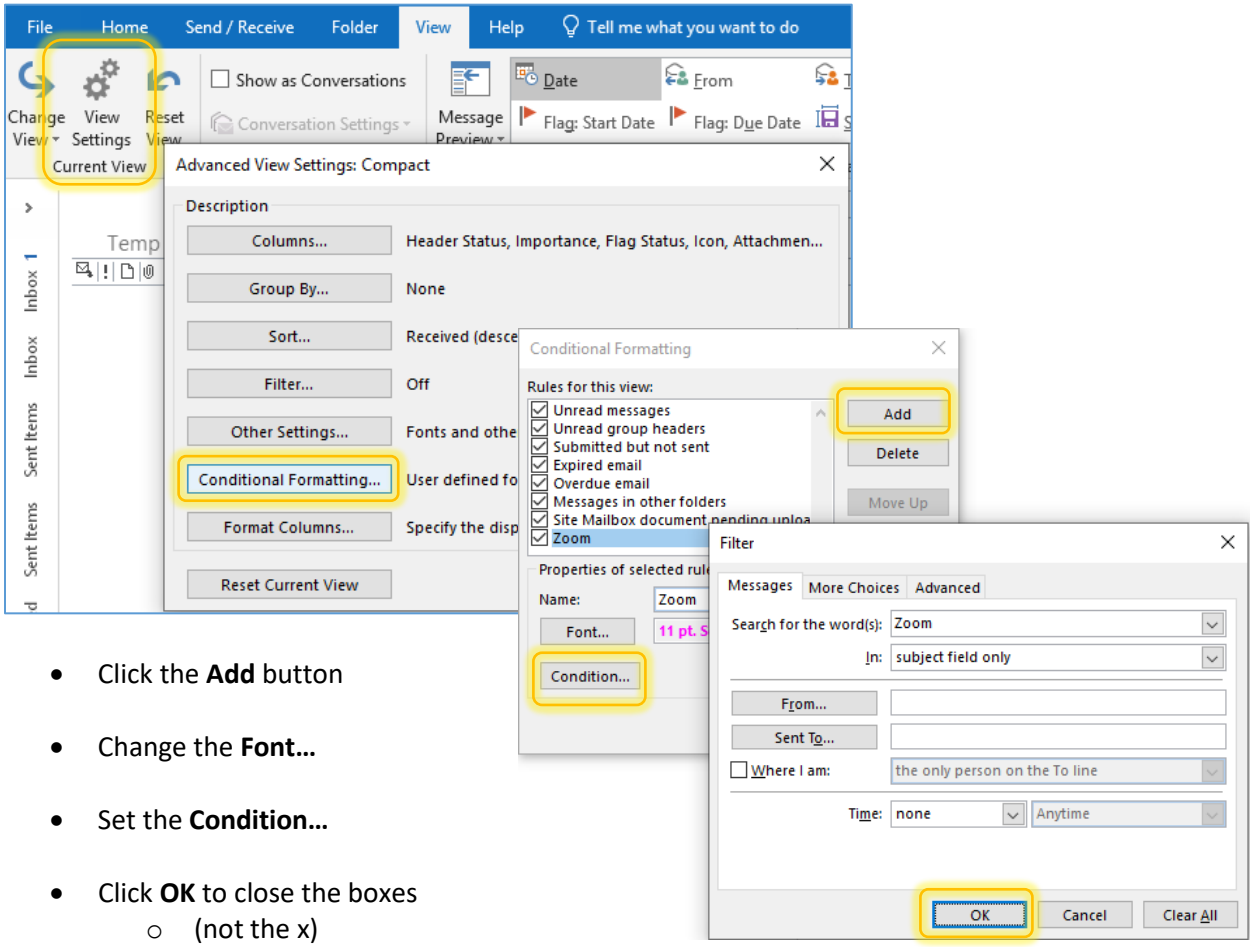
You do not have to be in the field chooser to rearrange and delete columns.

To remove a column heading, drag it out of the title bar.

To rearrange the columns, drag the heading to the desired location, watch for the Red arrows. If you accidentally remove it from the headings, there's no Undo. You'll have to open the Field Chooser and add it back to your titles.

Highlight Certain Emails

On the **View** tab, open the **View Settings** and choose **Conditional Formatting**.



- Click the **Add** button
- Change the **Font…**
- Set the **Condition…**
- Click **OK** to close the boxes
  - (not the x)

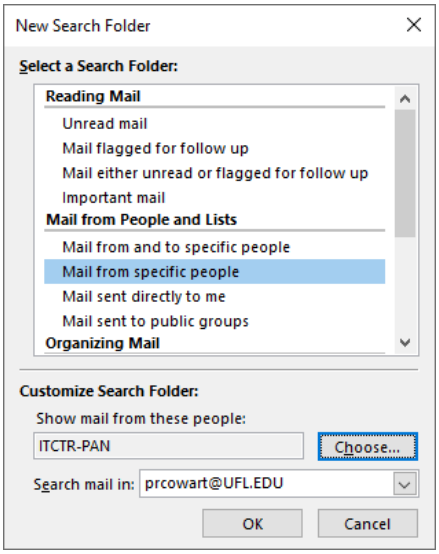
Organizing

To create a folder, in the Navigation pane, right-click on the folder you would like to place your new folder in and choose **New Folder**. Or from the **Folder** tab, choose **New Folder**.

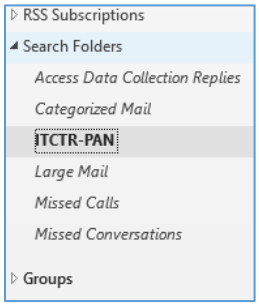
Create a Search Folder

From the **Folder** tab choose **New Search Folder**.

Set the search options. You will need to use the Choose button to find specific people.



You'll find the list of Search Folders at the bottom of the Navigation pane on the left side of the window.

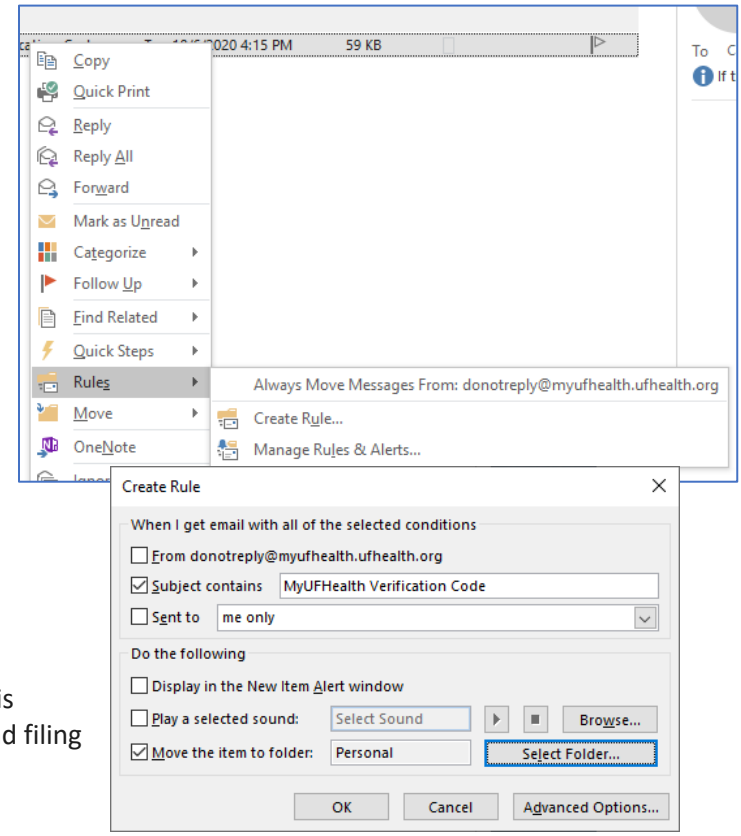


This is not a folder to store emails, it's a saved search so you don't have to go through the search options every time.

Rules

Rules allow you to move, flag, and respond to email messages **automatically**. You can also use rules to play sounds, move messages to folders, or display new item alerts.

The easiest and most common rule to create is one that allows you to move an item from a certain sender or with certain words in the subject line to another folder. You can create this rule directly from a message you've already received.

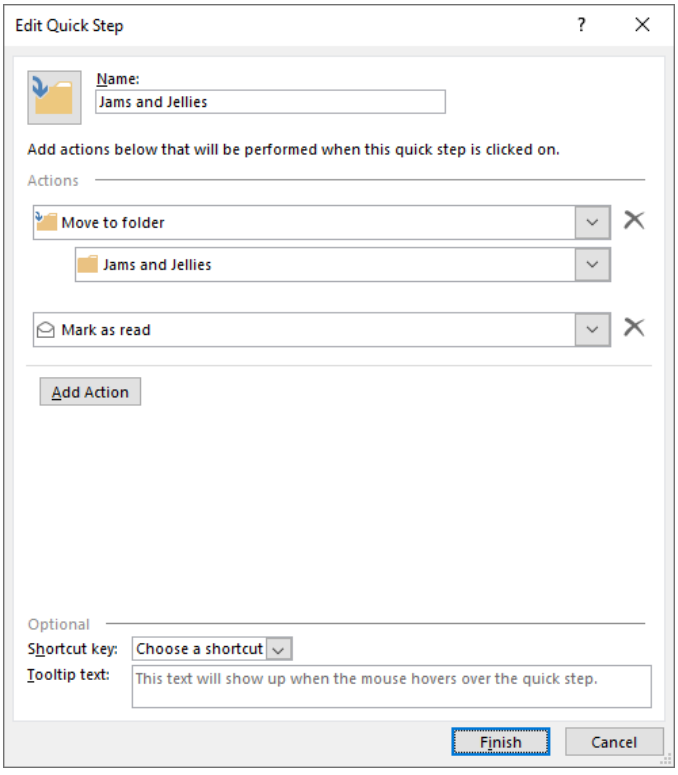


- Right-click a message in your inbox or another email folder and select **Rules**.
- Select **Create Rule**.
- Select the conditions and results. In this example I'm using a specific Subject and filing it into a specific folder.

Quick Steps

Quick Steps apply multiple actions at the same time to email messages when you click the Quick Step option.

- In **Mail**, select **Home**.
- On the **Home** tab, in the **Quick Steps** group, select the **Create New** Quick Step.
- In the **Name** box, type a name for the new Quick Step.
- Under **Actions**, choose an action that you want the Quick Step to do.
- Select **Add Action** for any additional actions.
    - In this example I am moving the email to a new folder and marking it as Read.
    - When you choose a folder, you'll be given an option to create a new folder, if needed

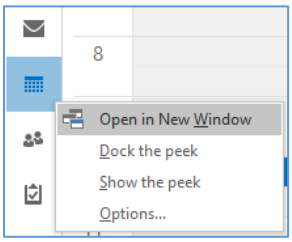


Create a calendar Item from an Email

You can drag an email to the Calendar icon at the bottom of the Navigation pane to copy the email into a new Appointment. You then can change the Date and Time.

Open Calendar AND Inbox

To view both the mailbox and the calendar, while in the Mailbox right-click on the calendar at the bottom of the navigation pane and choose, **Open in New Window**.



Once the Calendar is open you may wish to view the Inbox and Calendar side by side. Use the Windows key and arrow keys to move each window.

⊞-← Move window to the Left Side
⊞-→ Move window to the Right Side

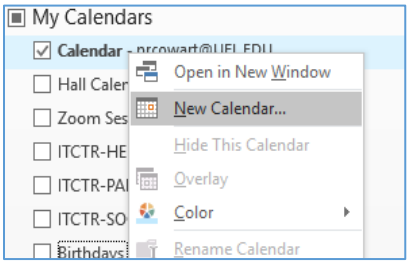
If this doesn't work, you can right-click on the Windows task bar and choose **Show Windows Side by Side**. You may need to minimize your other open windows for this to work properly.

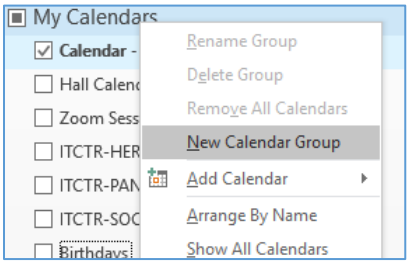
Once you have both the calendar and email views showing, you can drag an email to a specific Day and Time and Outlook will create an appointment with the content of the email and the chosen Date/Time.

New Calendars and Groups

In the Calendar view you can right-click on your calendar in the navigation pane and choose New Calendar. This new calendar can be shared with other people.

To organize your calendars, you can make a new group by right-clicking on the title My Calendars and choose New Calendar Group. You can then drag the calendars between the groups to help organize.

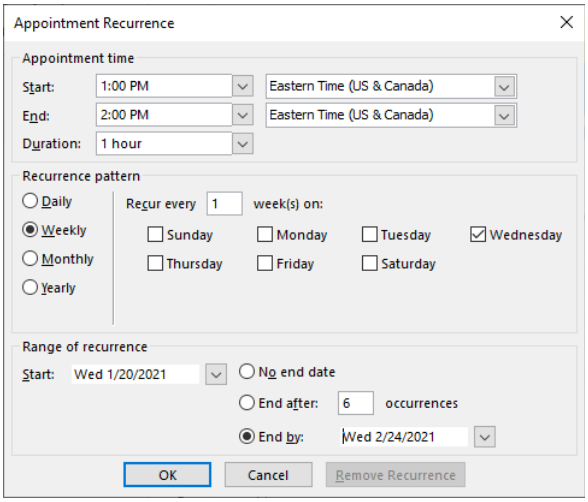




To delete a calendar, right-click on the calendar name and choose Delete. Caution there is no UNDO.

End Recurring Appointments

When you have a recurring appointment/meeting that is no longer going to be held, open the appointment and change the end by date to the current date.

To avoid modifying past appointments, it's usually best to stop the current recurring appointment and make a new one with the new pattern.

The alternative is to create each appointment individually. You can use the shortcuts to copy and paste (Ctrl-C, Ctrl-V), or use the Ctrl key when you drag the appointment to a new time.