



superhighways

harnessing **technology** for **community** benefit

# Outlook tips

## Organising your inbox & more

# Digital Foundations programme

There are many ways we can help small community organisations make sound choices about the digital tools and technology they use.



## Communications made easy

Raise your profile using digital tools to engage supporters and fund your future

[Read more »](#)



## Digital basics

Work and collaborate online using free and affordable digital tools and technology

[Read more »](#)



## Websites for communities

Put your website at the heart of your charity or community organisation's story

[Read more »](#)

[Find out more about the Digital Foundations programme](#)



# What we'll be covering today...

- ✓ Settings & views
- ✓ Flagging & categorising
- ✓ Sorting, filtering & search
- ✓ Sub boxes, moving emails & rules
- ✓ Scheduling emails
- ✓ Signatures & Out of office
- ✓ Encrypting emails

*\* And becoming familiar with Settings options and using Help so you can look things up & make changes in future \**



**Part 1** – Outlook web app (online Outlook via a browser)

**Part 2** – Outlook local desktop app (e.g. Outlook 2016, 2019 or M365)



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OneDrive



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# Microsoft cheat sheets

✓ [Outlook Mail on the Web cheat sheet](#)

✓ [Outlook Mail for Windows cheat sheet](#)

✓ [Outlook Calendar on the Web cheat sheet](#)

✓ [Outlook Calendar for Windows cheat sheet](#)

## Cheat sheet - Outlook on the web Mail



### Organize your Inbox

The screenshot shows the Outlook on the web Mail interface. The top navigation bar includes the Outlook logo, a search bar, and buttons for 'New message', 'Delete', 'Archive', 'Junk', and 'Sweep'. The left sidebar shows 'Favorites', 'Folders', and 'Inbox' (with 46 items). The main area displays a list of messages, with the 'Focused' tab selected. A 'Filter' dropdown menu is open, showing options for 'All', 'Unread', and 'To me'. Three callout boxes provide instructions:

- Switch between **Focused** and **Other** inbox.
- Filter, sort, and turn on **Conversations** and **Focused Inbox**.
- See only your **Unread** messages.



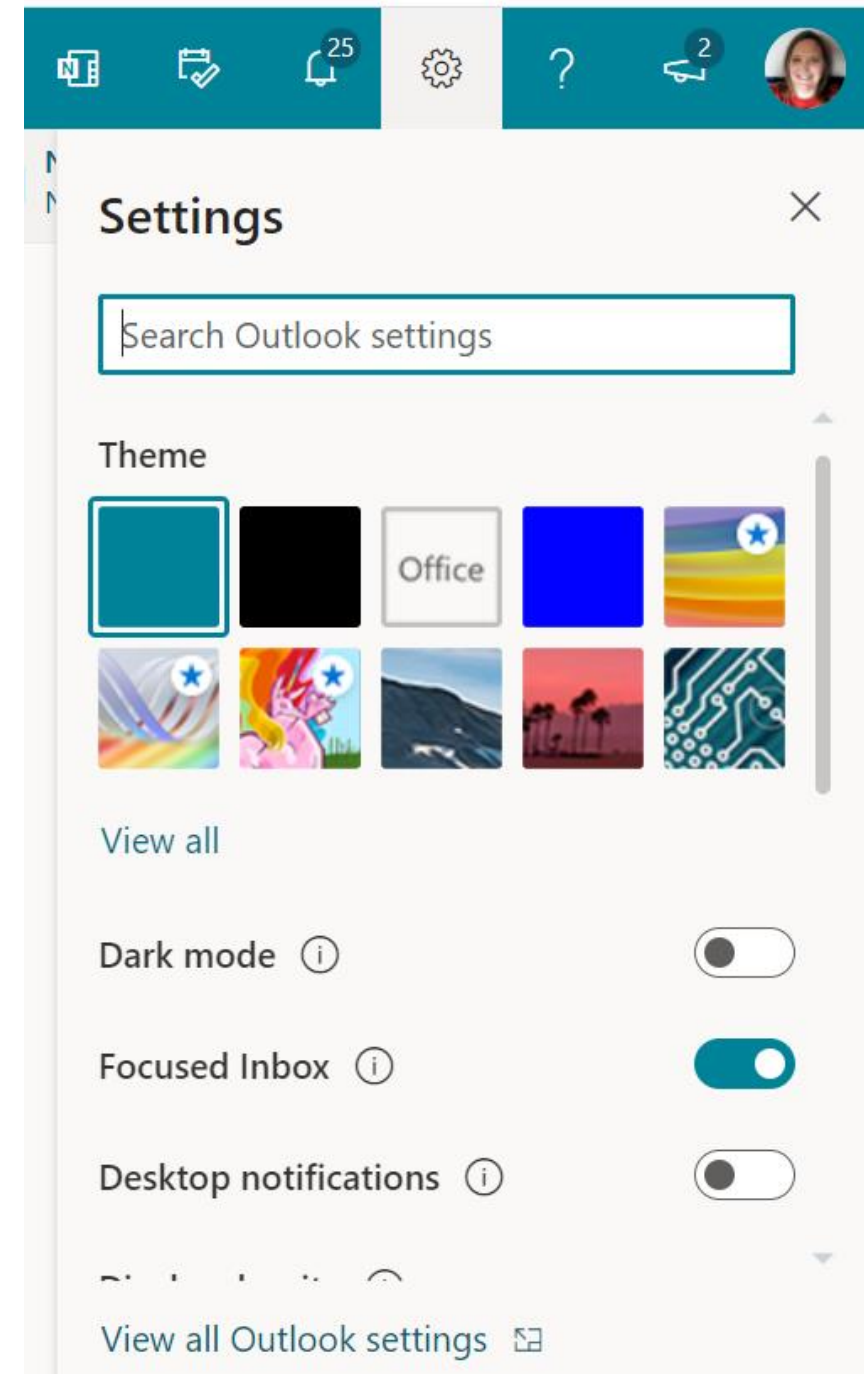
# Part 1

Outlook web app (online Outlook accessed via a browser)



# Outlook Settings

- ✓ Click on the cog wheel at the top right to access Settings
- ✓ Either scroll through or use the Search box e.g. 'Out of Office' will find you the Automated responses settings





# Changing your View

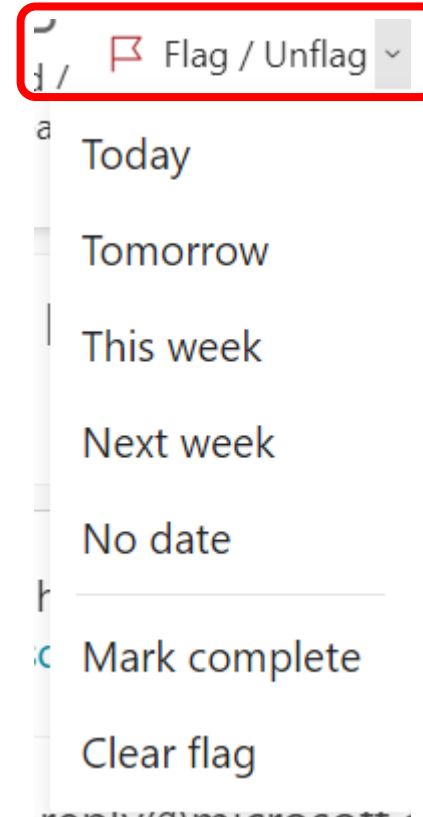
- ✓ Select the View tab
- ✓ Click on e.g. Message preview and Reading pane and choose the options that suit you – e.g. whether you have a preview of emails as well as a list
- ✓ Choose to select (or not) Conversation View (this links email replies in a single thread but allows you to navigate to a specific email when you click the arrow to expand the conversation)
- ✓ Choose how your emails are sorted – e.g. by Date (you can choose which order)
- ✓ Alternatively use the View settings option (top right) for more options including Focused inbox



# Flagging emails for follow up

Useful as a **reminder** to follow up on an email when you don't have time there and then...

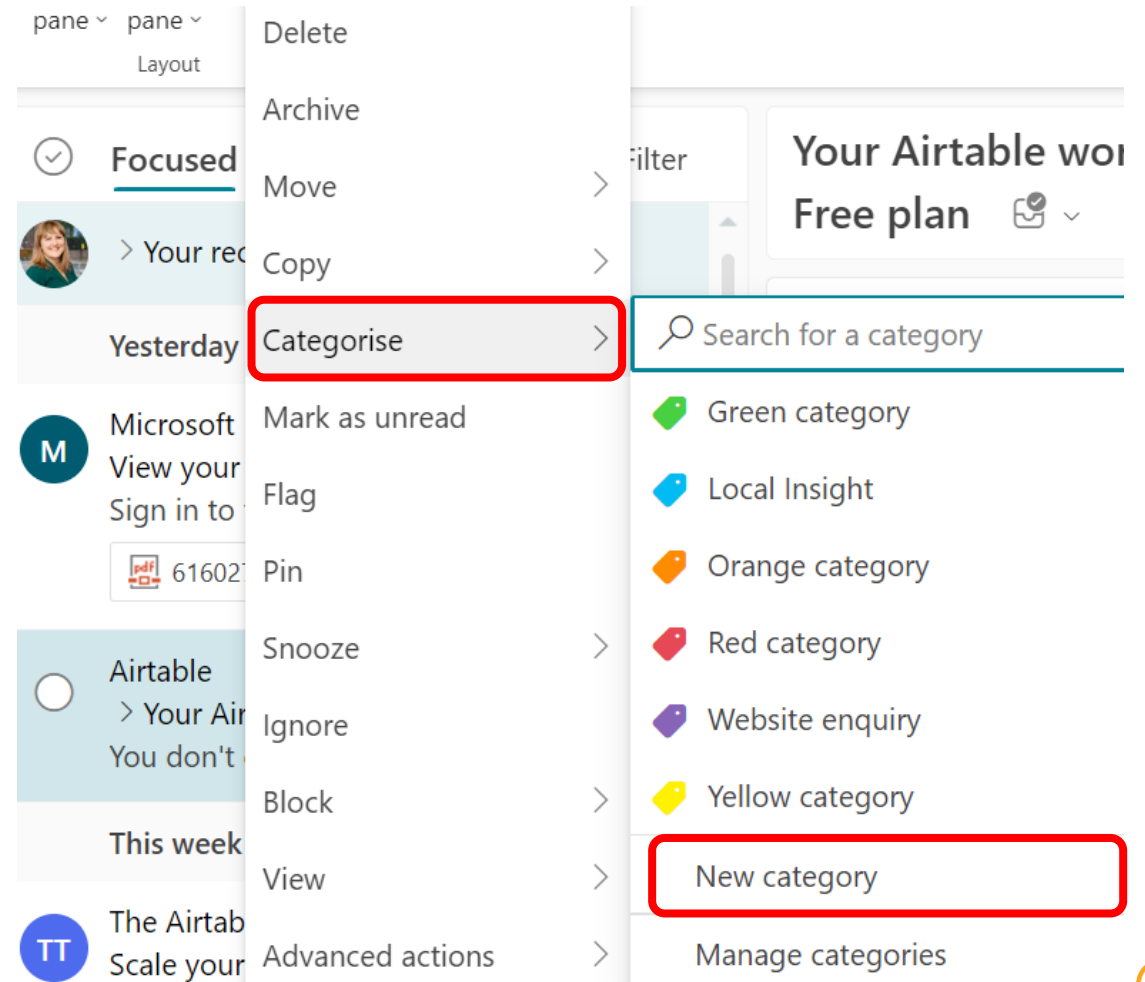
- ✓ Right click on an email
- ✓ Select Flag
- ✓ Or select email and use the Flag/Unflag option in the menu bar, Home tab
- ✓ Here you can choose a timeframe



# Categorising emails

Categorise your emails against standard or custom options – you can then search and filter for quick access

- ✓ Right click on an email
- ✓ Select Categorise & select a Category
- ✓ To add a new Category, select New category





















✓ Choose Manage categories so you can:

- ✓ Create a new category
- ✓ Rename existing ones
- ✓ Change the colours

## Categories

Categorising your emails and calendar can help you organise and track by person. You can create new categories and assign them names and colours.

+ Create category

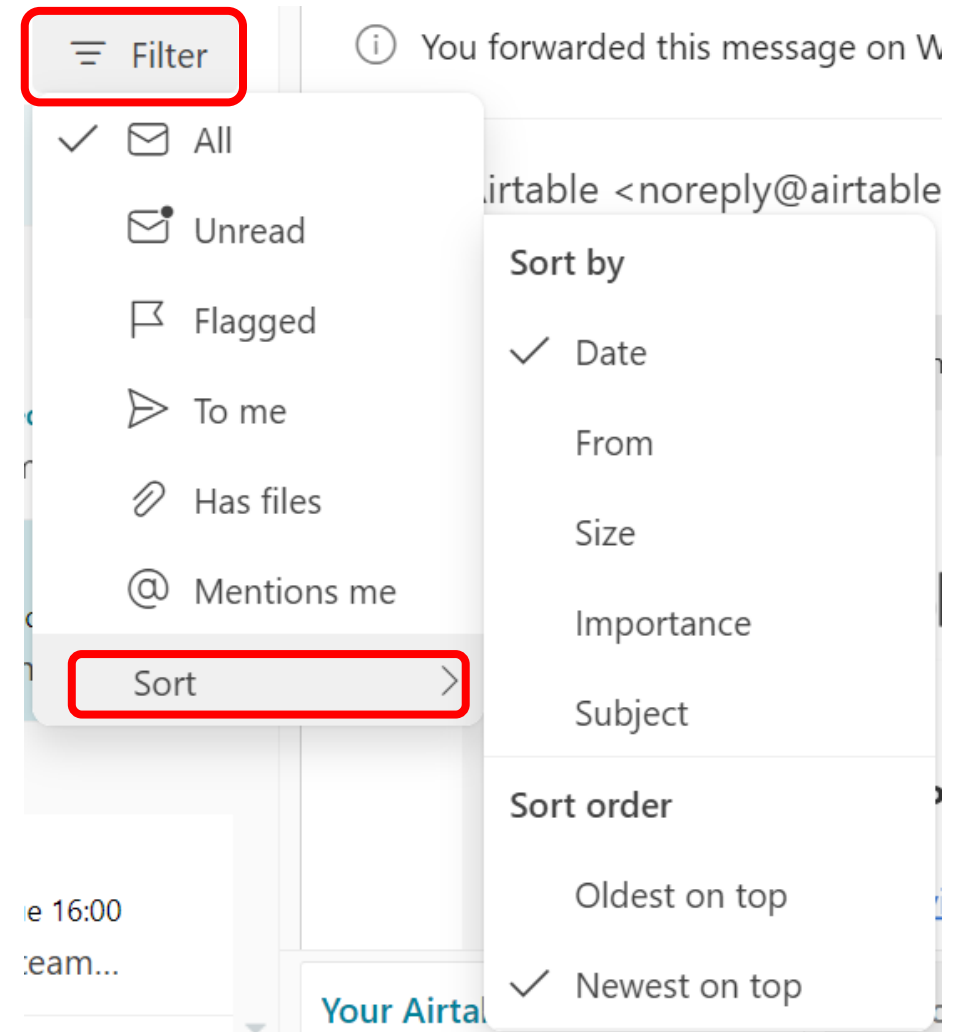
 Green category		
 Local Insight		
 Orange category		
 Red category		
 Website enquiry		
 Yellow category		



# Filtering & sorting

Filtering & sorting can help you quickly find and action an email

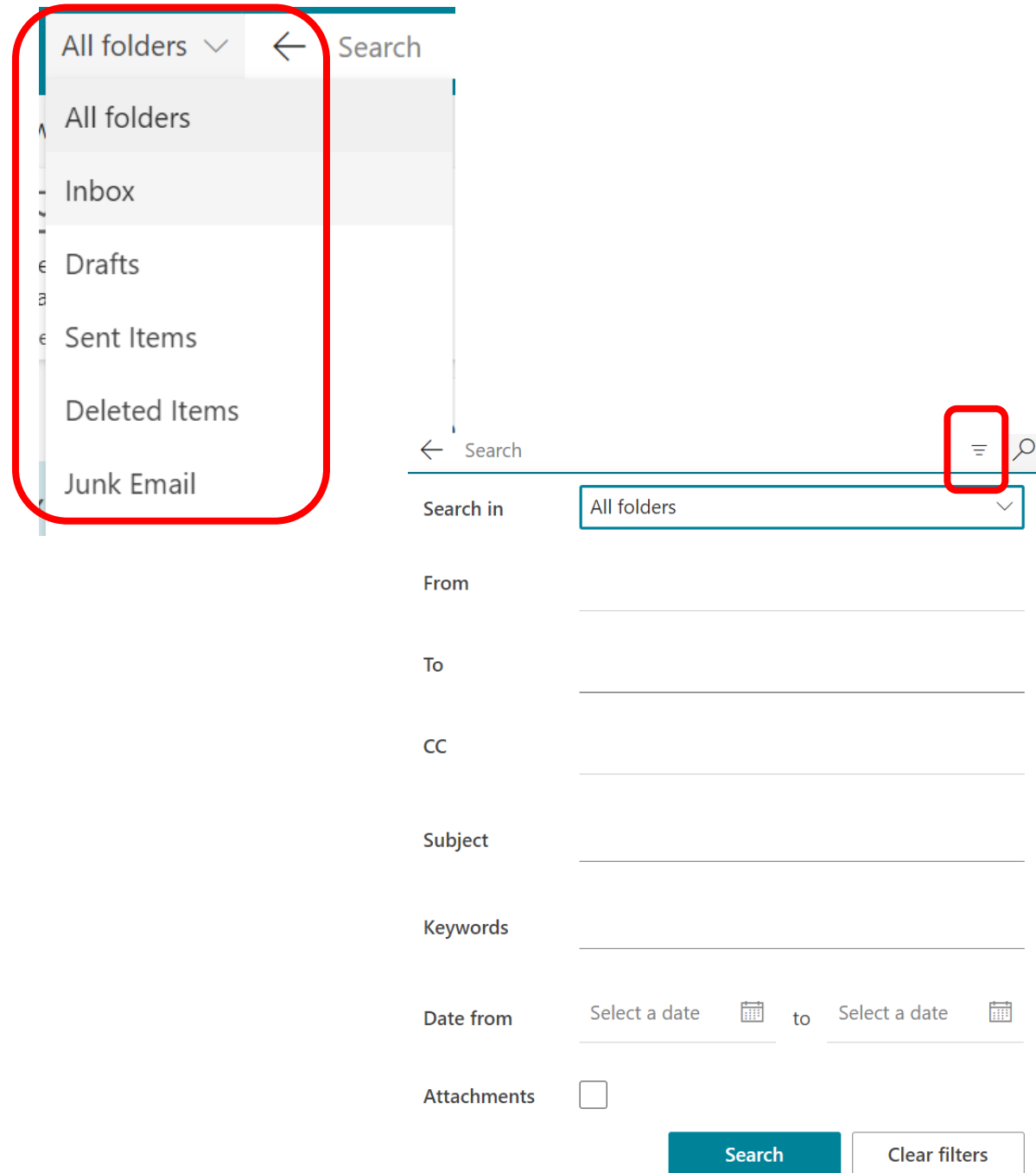
- ✓ Click on the Filter icon at the top right of your list of emails
- ✓ Either Sort on e.g. Size, Date, From (and reverse the sort to suit) and your emails are re-ordered accordingly
- ✓ Or choose one of the Filter options e.g. Flagged, Unread or Has files – and only those email will be shown



# Using search

The Search bar is at the top of your Window

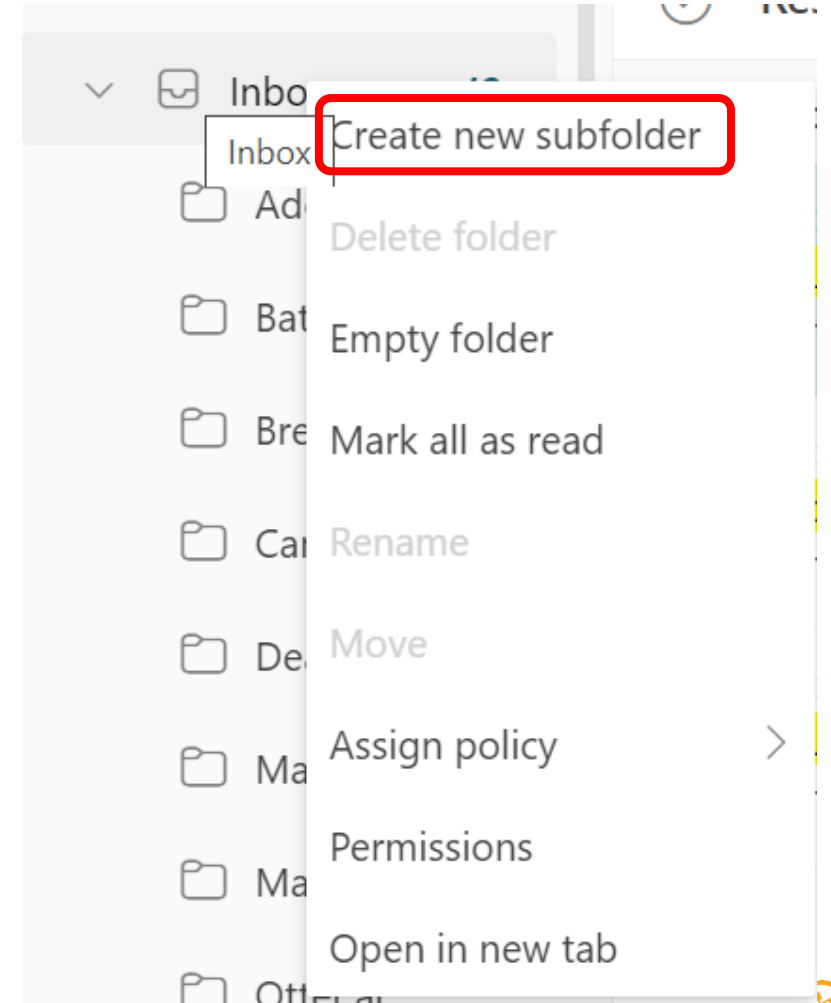
- ✓ By default, search will look in all folders. Click the left arrow to specify a particular folder to search in e.g. Sent
- ✓ Select the Filter icon at the right of the Search bar for more advanced search options as shown



# Sub folders

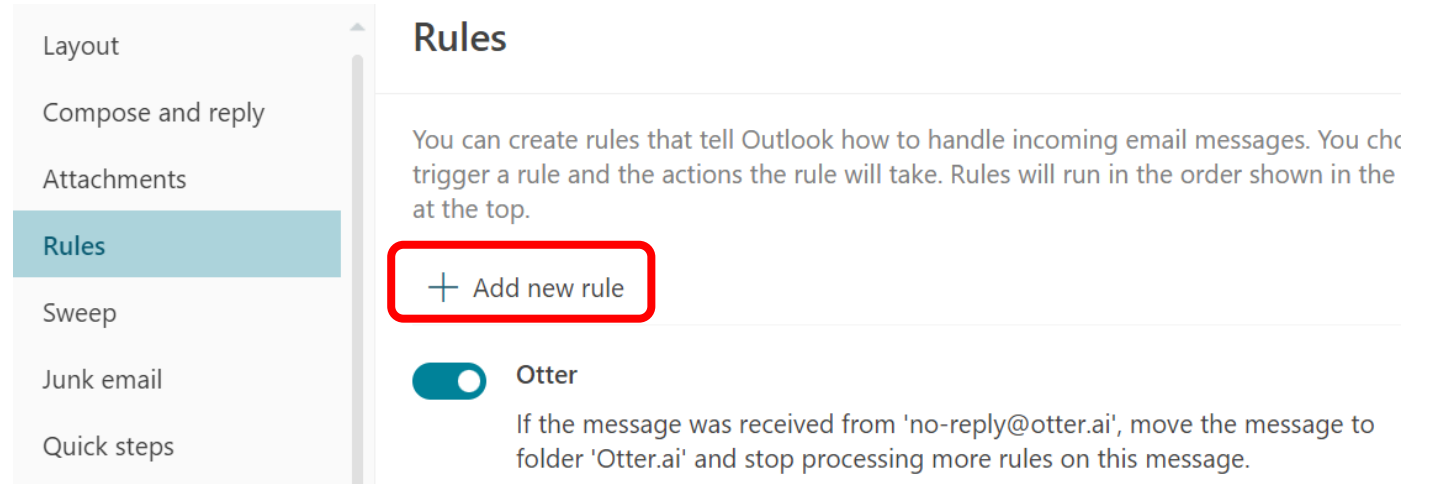
Setting up **sub folders** can help you organise your inbox to find emails you need...

- ✓ Right click on your Inbox
- ✓ Select Create new subfolder
- ✓ Give your folder a name
- ✓ Either right click on emails and choose Move to folder
- ✓ Or drag and drop emails to this folder



# Rules

- ✓ Search for Rules via the Settings cog and select Inbox rules
- ✓ Here you'll see any rules already applied to your account
- ✓ You can also Add a new rule
- ✓ Identify your new rule with a name and then choose the Condition and Action from the options available



Layout

Compose and reply

Attachments

**Rules**

Sweep

Junk email

Quick steps

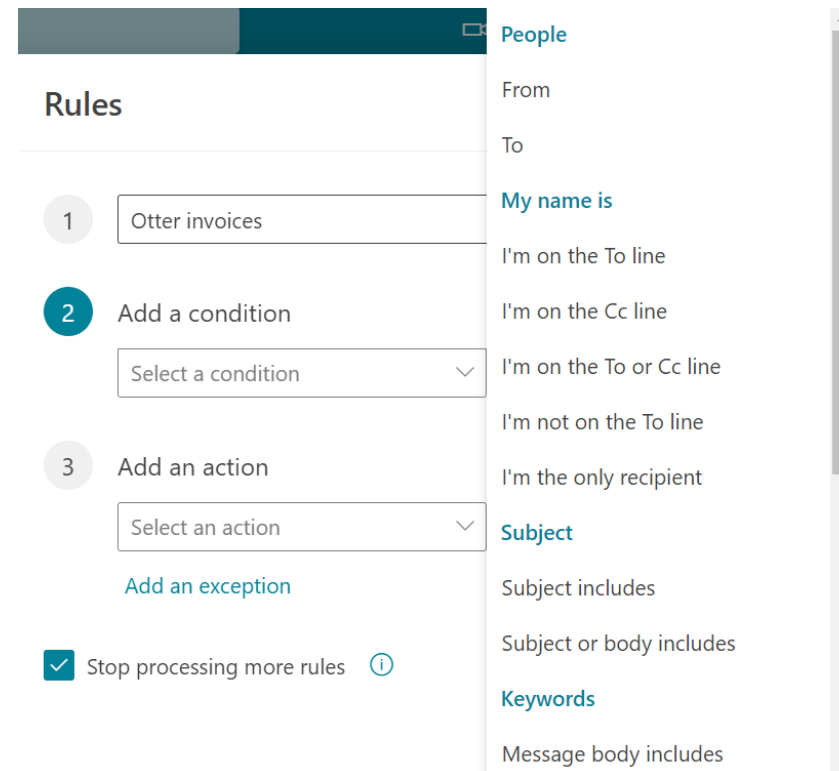
## Rules

You can create rules that tell Outlook how to handle incoming email messages. You can trigger a rule and the actions the rule will take. Rules will run in the order shown in the list at the top.

**+ Add new rule**

**Otter**

If the message was received from 'no-reply@otter.ai', move the message to folder 'Otter.ai' and stop processing more rules on this message.



People

## Rules

- 1 Otter invoices
- 2 Add a condition  
Select a condition
- 3 Add an action  
Select an action  
[Add an exception](#)

Stop processing more rules ⓘ

From

To

**My name is**

I'm on the To line

I'm on the Cc line

I'm on the To or Cc line

I'm not on the To line

I'm the only recipient

**Subject**

Subject includes

Subject or body includes

**Keywords**

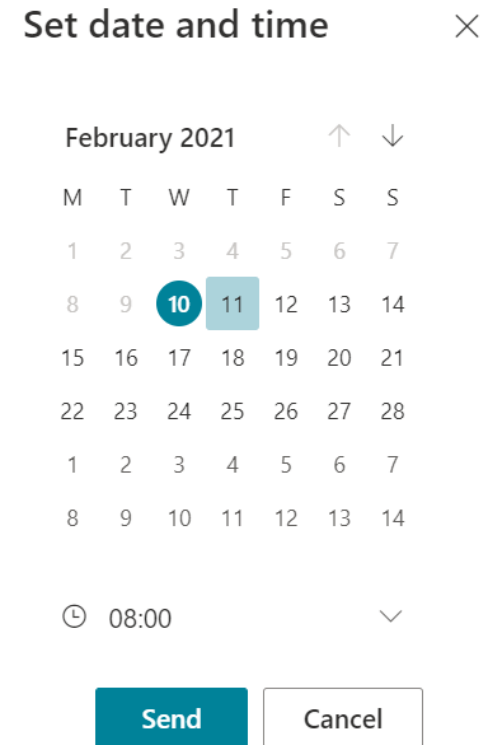
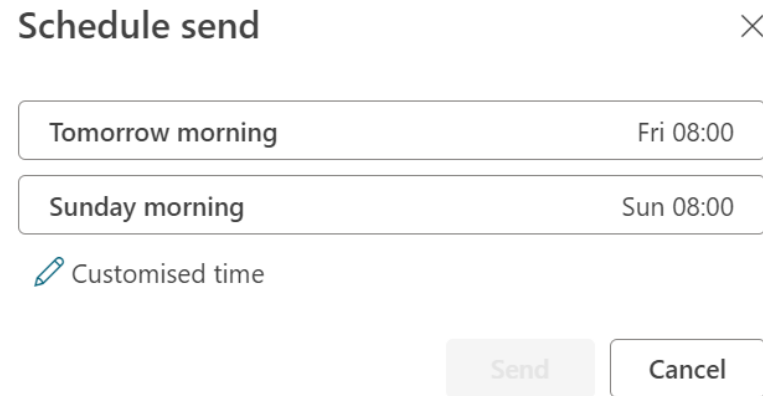
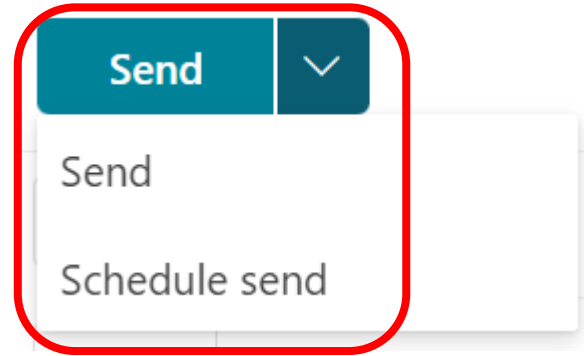
Message body includes





# Scheduling send

- Click the Down arrow next to Send and select Schedule send
- Now choose the date and time from suggested options or choose **Customised time** and choose exactly when you'd like the email to send



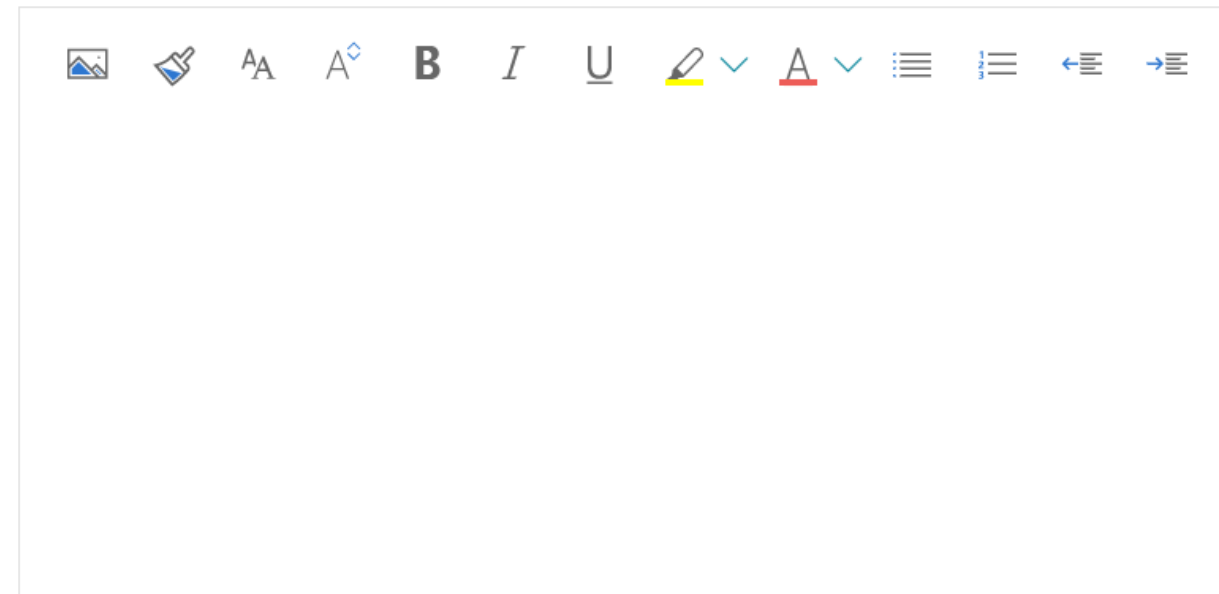
# Adding / editing signatures

- ✓ Search for signature via the Settings cog
- ✓ Add your signature and choose whether to include just in new messages or also for replies and forwards

## Compose and reply

### Email signature

Create a signature that will be automatically added to your email messages.



- Automatically include my signature on new messages that I compose
- Automatically include my signature on messages I forward or reply to

# Out of Office (Automatic Replies)

- ✓ Search for Out of Office in Settings
- ✓ Then choose Automatic Replies
- ✓ Toggle Automatic replies on
- ✓ Set a date range *(or a reminder in your calendar to manually switch this off when you're back!)*
- ✓ You can set a different message to send internally (to your colleagues) and externally

## Automatic replies

Use automatic replies to let others know you're on holiday or aren't replies to start and end at a specific time. Otherwise, they'll continue

Automatic replies on

Send replies only during a time period

Start time 13/04/2023 08:00

End time 14/04/2023 08:00

Send automatic replies inside your organisation

Rich text editor toolbar with icons for bold, italic, underline, link, unlink, list, and indent.

Add a message here

Send replies outside your organisation

Send replies only to contacts



# Open another mailbox via web

- ✓ Click on your profile pic / initials in the top right and select Open another mailbox
- ✓ Type in the mailbox you need to open (this will depend on what you have access to) and click Open. It will open in a new Tab.

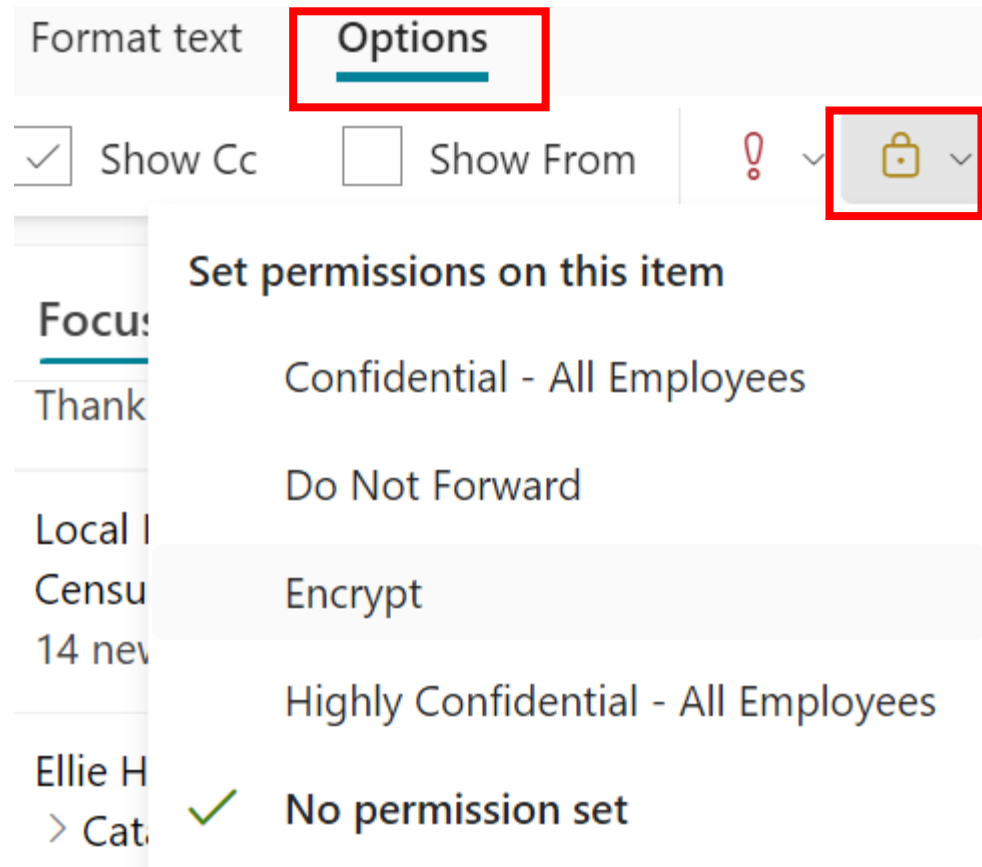
Open another mailbox

Open

Cancel

# Encryption (via Outlook in the browser)

- With Business Premium licences you can also Encrypt emails sent
- Create your email and click on Options
- Then look for the Padlock icon
- Then click on Encrypt. You can additionally add on the Do Not Forward option



## Part 2

Outlook local desktop app (standalone  
e.g Outlook 2016 or 2019 or M365)



# Changing your View

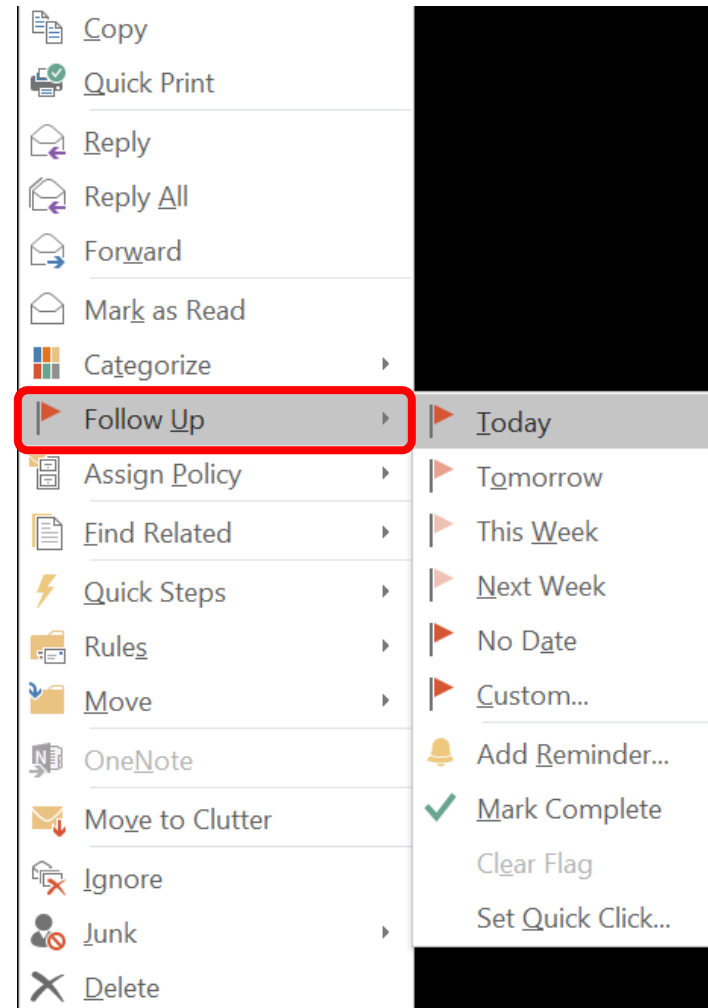
- ✓ Select the View tab
- ✓ Click on Change View and choose the option that suits you – e.g. whether you have a preview of emails as well as a list
- ✓ Choose to select (or not) Conversation View (this links email replies in a single thread but allows you to navigate to a specific email when you click the arrow to expand the conversation)
- ✓ Choose how your emails are sorted – e.g. by Date (you can choose which order)



# Flagging emails for follow up

Useful as a **reminder** to follow up on an email when you don't have time there and then...

- ✓ Right click on an email
- ✓ Select Follow up
- ✓ Choose a time frame or No Date
- ✓ You can then search on Flagged emails

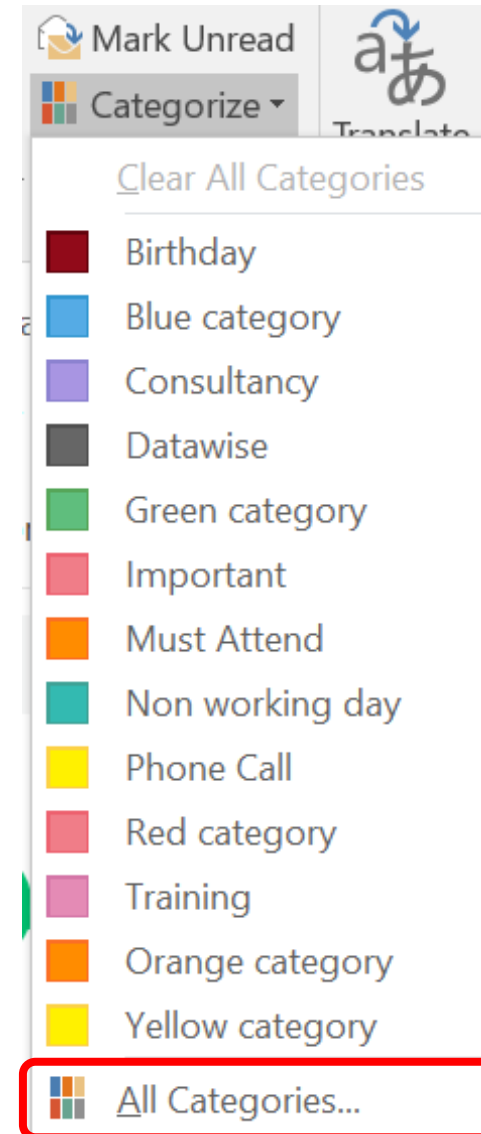
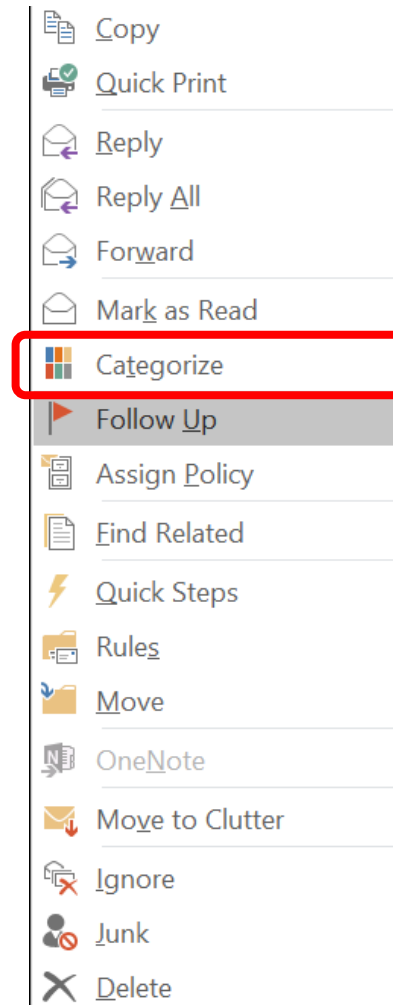




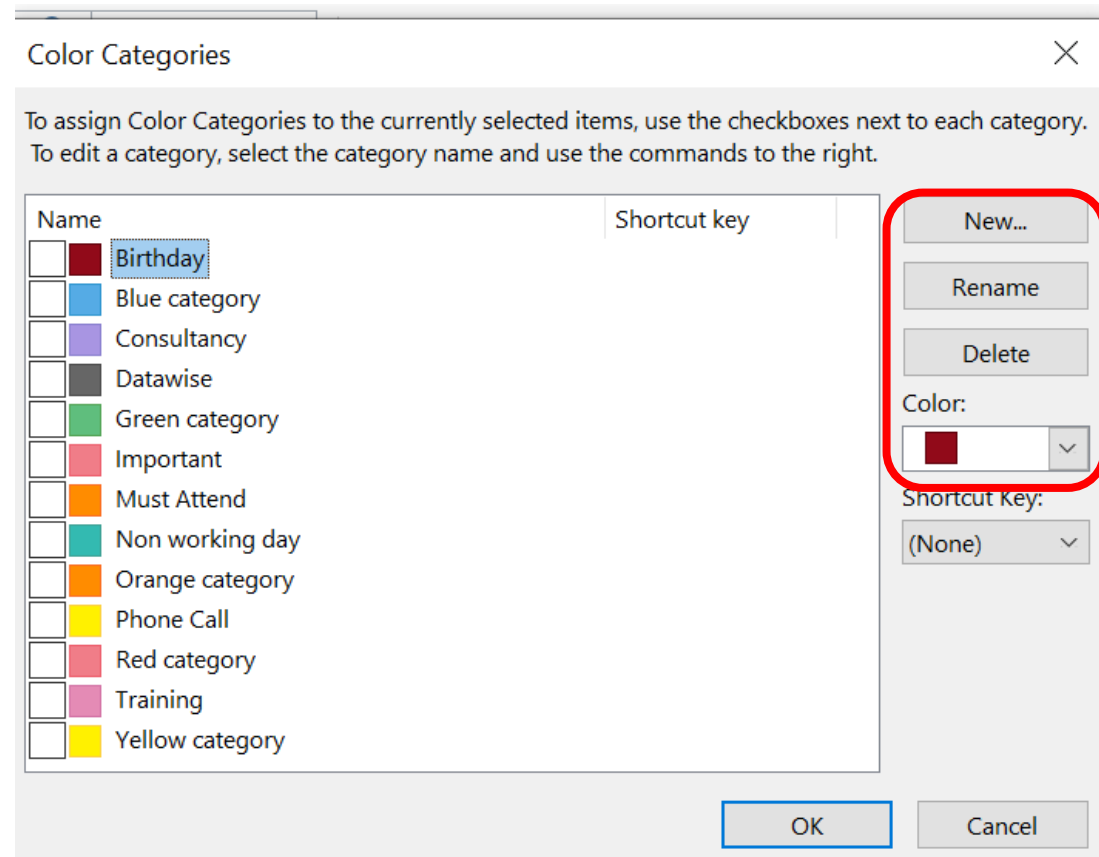
# Categorising emails

Categorise your emails against standard or custom themes – you can then search and filter for quick access

- ✓ Right click on an email
- ✓ Select Categorize & select a Category
- ✓ To add a new Category, select All Categories



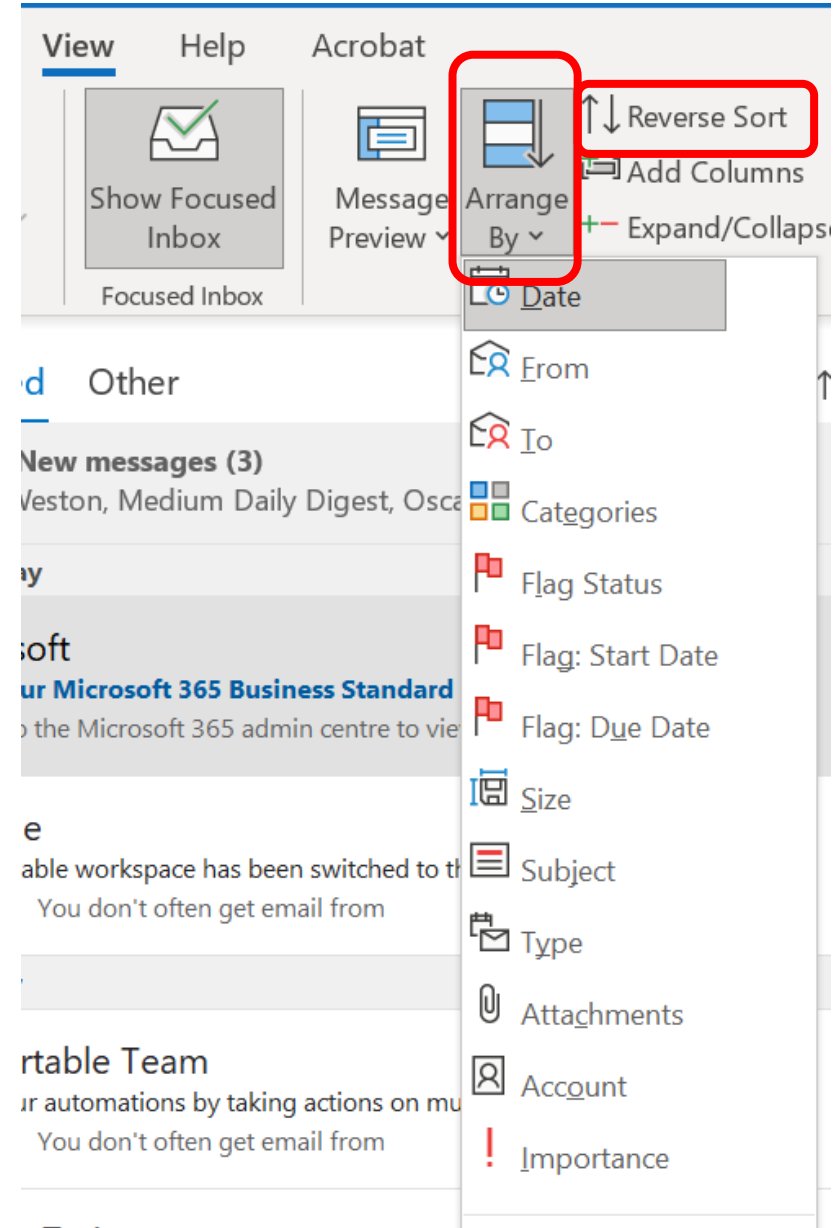
- ✓ Choose New to add a new Category
- ✓ Or Rename existing ones
- ✓ Or change the colours
- ✓ You should then be able to select these when you next choose to categorise an email



# Filtering & sorting

Filtering & sorting can help you quickly find and action an email

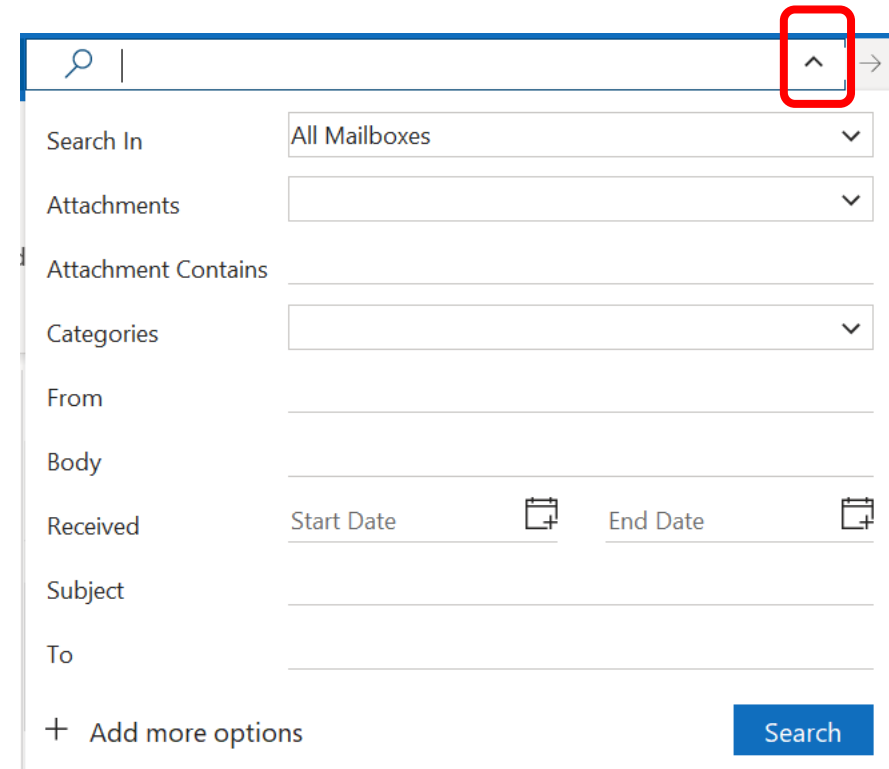
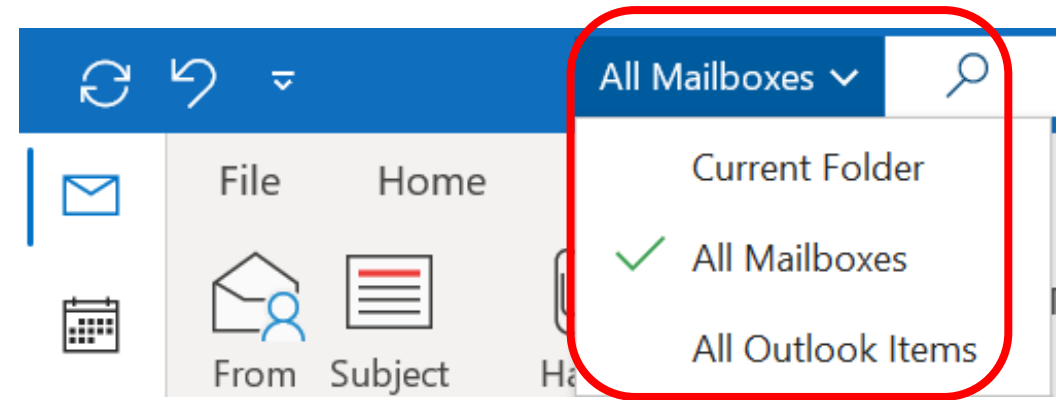
- ✓ In the View tab, select Arrange by
- ✓ Now choose an option for how you want to order your emails
- ✓ Select Reverse sort to suit



# Using search

The Search bar is at the top of your Window

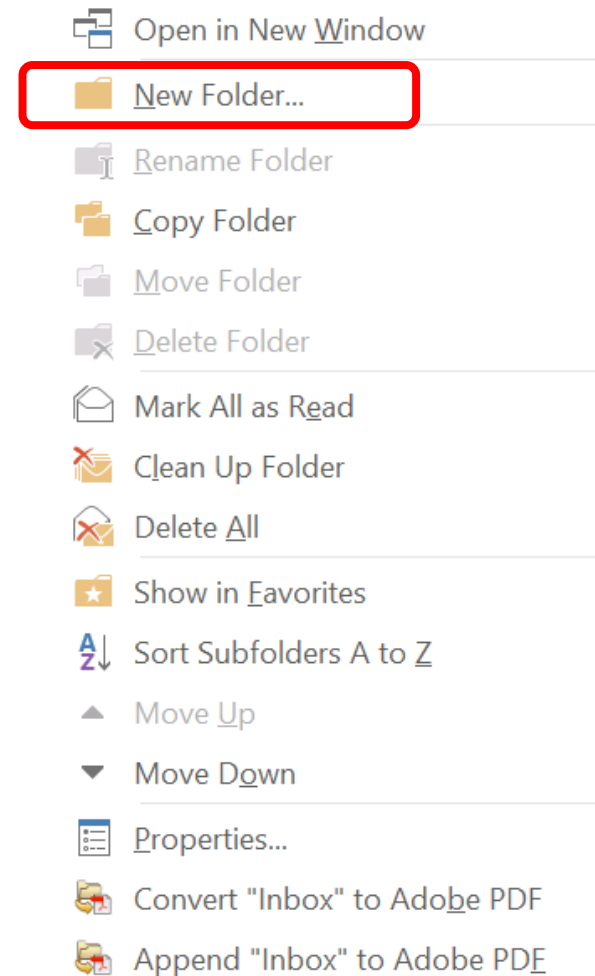
- ✓ By default, search will look in all Mailboxes. Click the drop down arrow to specify a particular Folder
- ✓ Click on the drop down arrow at the bottom right of the Search bar to see the Advanced search options



# Sub folders

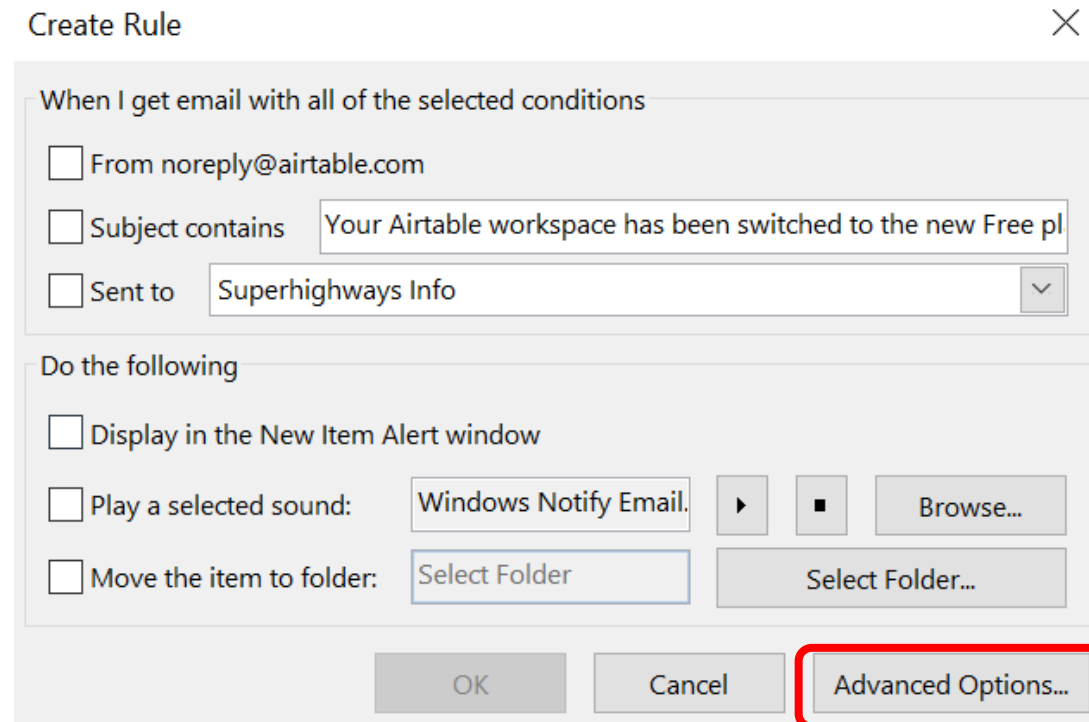
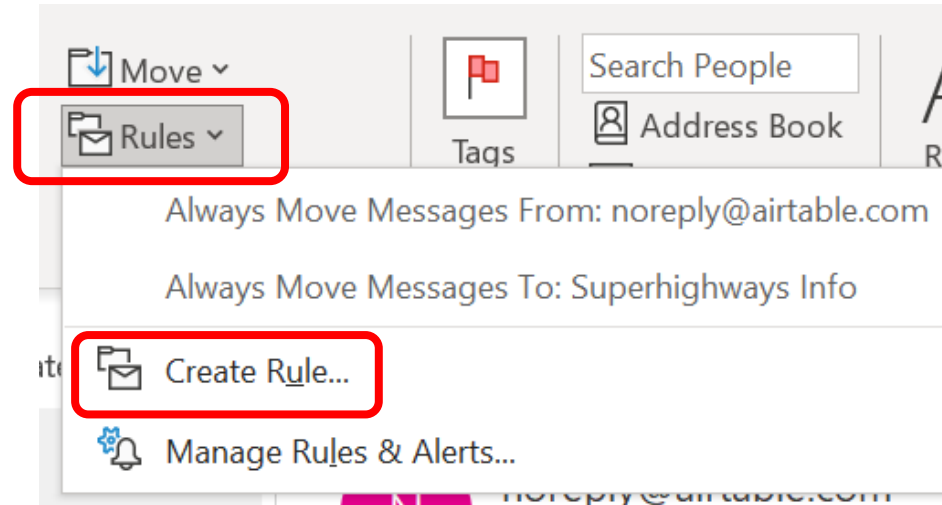
Setting up **sub folders** may help you organise your inbox to find emails you need...

- ✓ Right click on your Inbox
- ✓ Select New Folder
- ✓ Give your folder a name
- ✓ Either right click on emails and choose Move to folder
- ✓ Or drag and drop emails to this folder



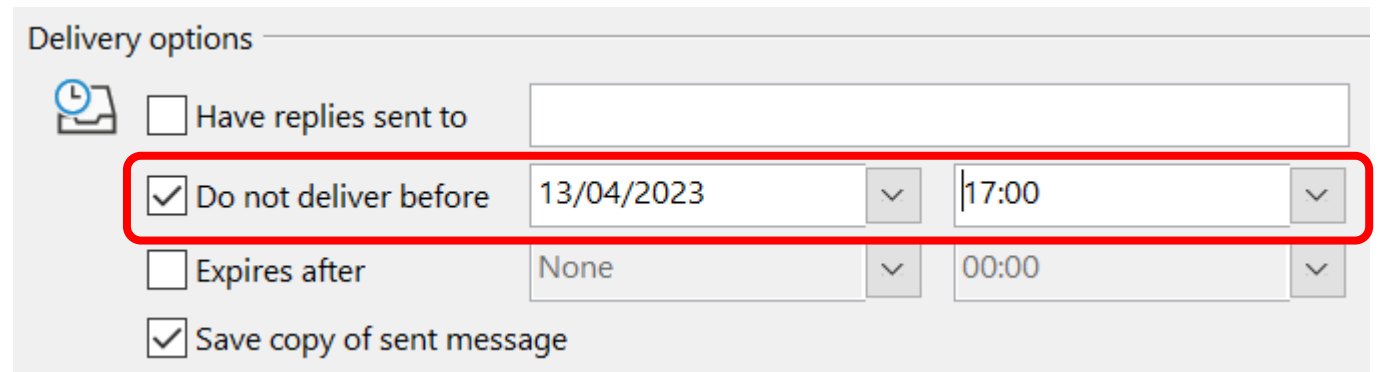
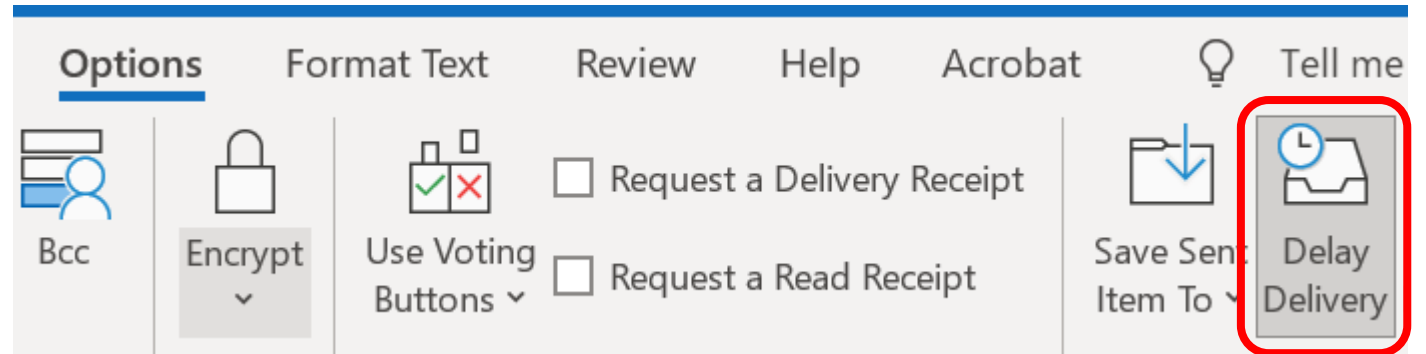
# Rules

- ✓ Look for Rules in the Home tab main menu bar
- ✓ Choose the Always move messages to create a simple rule (e.g. move to a particular sub folder)
- ✓ Or select Create a Rule and build your own using the options in the dialogue box
- ✓ Select Advanced Options for other rule conditions and actions



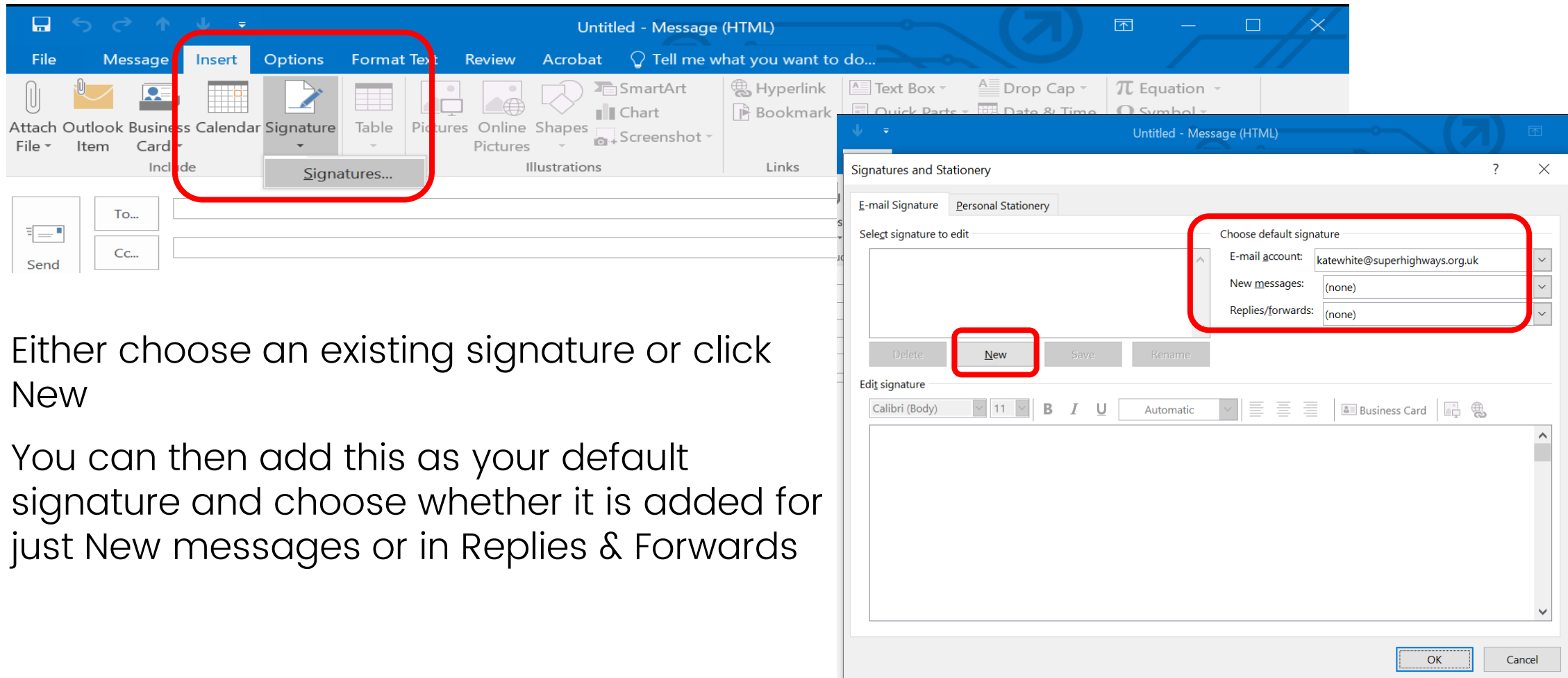
# Delaying delivery

- In the Options tab in the menu, click on Delay Delivery
- In Delivery options choose the Date and Time you want the email to be delivered in the Do not deliver before box



# Adding / editing signatures

- ✓ Create your email and select the Insert tab, then Signature



The image shows a screenshot of the Microsoft Outlook interface. The 'Insert' tab is selected in the ribbon, and the 'Signature' group is highlighted with a red box. Below the ribbon, the 'Signatures...' button is also highlighted with a red box. To the right, the 'Signatures and Stationery' dialog box is open. In this dialog, the 'Choose default signature' section is highlighted with a red box, showing the 'E-mail account' dropdown set to 'katwhite@superhighways.org.uk'. The 'New' button in the 'Select signature to edit' section is also highlighted with a red box. The 'Edit signature' section at the bottom shows a rich text editor with a font set to Calibri (Body) size 11, and bold, italic, and underline options.

- Either choose an existing signature or click New
- You can then add this as your default signature and choose whether it is added for just New messages or in Replies & Forwards



# Out of Office (Automatic Replies)

- ✓ Click on File
- ✓ Then choose Automatic Replies
- ✓ Select Send automatic replies
- ✓ Set a date range (*or a reminder in your calendar to manually switch this off when you're back!*)
- ✓ You can set a different message to send internally (to your colleagues) and externally

Automatic Replies - katewhite@superhighways.org.uk

Do not send automatic replies  
 Send automatic replies

Only send during this time range:

Start time: Tue 09/02/2021 23:00  
End time: Wed 10/02/2021 23:00

Automatically reply once for each sender with the following messages:

Inside My Organization  Outside My Organization (Off)

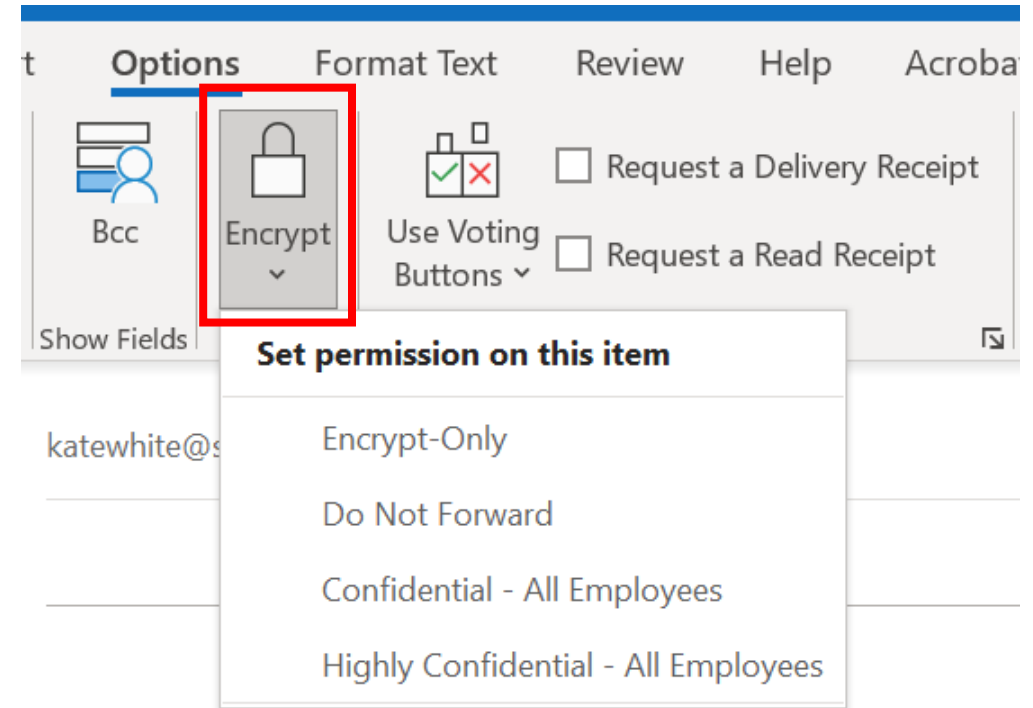
Calibri 12 B I U A: 1/2/3

I'm off now till Mon Jan 4th - have a great break everyone - rest and recharge :)

Rules... OK Cancel

# Encryption

- With Business Premium licences you can also Encrypt emails sent
- Create your email and click on Options
- Then look for the Encrypt & padlock icon and click on the down arrow
- Choose the Encryption and Permission options



# Open another mailbox via local app

✓ If you have permission to view and access another mailbox, it should be listed in the left hand pane underneath your main inbox

✓ Click on the name and the Inbox etc should drop down

The screenshot displays an email client interface. On the left is a sidebar with a mailbox list. The 'Inbox' is selected and highlighted. On the right is the main email view, showing a list of emails with their subjects, senders, and dates. The interface is organized into sections: 'All' and 'Unread' at the top right; 'Last Week' containing two emails; 'Two Weeks Ago' containing two more emails. The selected email is 'Alise from Infogram' with the subject 'Free Dataviz Resources to Get you Inspired'.

**Mailbox List (Left Pane):**

- ✓ Favorites
- Sent Items
- Deleted Items 692
- Connected Kingston
- > Kylie Noble
- > Sue Quilter
- > Superhighways Equipment
- > Superhighways Helpdesk
- ✓ Superhighways Info
  - > **Inbox** 24
  - Drafts [4]
  - Sent Items
  - > Deleted Items 284
  - Archive 1
  - Clutter

**Email List (Main View):**

- All** Unread By Date ↑
- ▼ **Last Week**
  - Alise from Infogram**  
★ **Free Dataviz Resources to Get you Inspired** Thu 13/05  
All the inspiration you'll need to get started. Get inspired right here on Infogram
  - Otter.ai**  
**man-boy-a-positive-story-of-impact (1) - Ready to View in Otter** Wed 12/05  
<https://d28bktgdj10sby.cloudfront.net/email/assets/img/logo-otter@2x.png> Hi
- ▼ **Two Weeks Ago**
  - Alise from Infogram**  
🎉 **Congrats Kate !** Sun 09/05  
Here's how to share your project with your audience. Congrats Kate! Your project
  - Zoom**  
**You've exceeded your cloud recording storage recording limit** 08/05/2021  
Hi Kate White, You have exceeded your cloud recording storage recording limit.
- Alise from Infogram**  
📊 **Kate Add Data and Create Powerful Stories** 06/05/2021  
Use interactive graphics to bring your data to life. Tell stories with interactivity and

# About Superhighways

Providing tech support to small local charities in London for over 20 years

- ✓ Support
- ✓ [Training](#)
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ [Datawise London](#)
- ✓ [See all services](#)
- ✓ [E-news sign up](#)





# Thank you for listening

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#DigitalFoundations