

# Best practices for Outlook for Mac 2011

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This article was written by the product team that created Outlook for Mac 2011 for the best possible reason — our customers asked. Outlook for Mac 2011 is designed to be used by a wide audience with many work needs and styles. Although there's no one "right way," there are a few ways of working in the program that we know to be easier than others. We hope that by being aware of the best practices, you will have the best experience possible using Outlook for Mac 2011.

This guide represents our advice on how to get the most out of Outlook for Mac 2011. However, it is not a comprehensive guide. A few core scenarios are covered to help you leverage Outlook for Mac 2011 into your information management needs.

This guide is intended for people who:

- Work for a large company with an IT department.
- Receive more than 30 email messages a day.
- Spend lots of time every day using Outlook for Mac 2011 to send and receive messages and to set up or attend meetings.
- Are using Outlook for Mac 2011 with a [Microsoft Exchange Server account](#) .

Regardless of your server setup or organization size, this document will be useful to you. In this article, you will learn:

## Basic principles of good time management

Outlook for Mac 2011 is a tool to help you manage your email messages, calendar, contacts, and tasks. As such, it is at the center of not only your communications but also your time-management. To get the most out of Outlook for Mac 2011, we suggest a few basic principles:

- Reduce the number of places where you read messages. Filter all of the messages that you need to read into one place — your Inbox by using a series of rules.
- Let some messages pass by. Use rules to send the messages that you need to read into your Inbox, and then let the rest flow untouched into your Contact Group (also known as, distribution lists in your corporate Global Address Group. You can create Contact Groups in Outlook for Mac as well but these Contact Groups are saved to your local computer and should be used for contacts outside your company. See the Contacts section below for rules about working with local Contact Groups) folders. You don't need — and in high volume situations probably can't — read every message sent to you. Only the important ones should go to your Inbox. Remaining messages can be useful to keep — in case you become involved on an issue, for example.
- Reduce the number of places where you manually file messages. Reduce the mental tax of filing by relying on search to locate messages.
- Process your messages by using the Four Ds. When reading your messages, decide whether to: Delete it. Do it (respond or file for reference). Delegate it (forward). Defer it (using categories and flags) for a second review in your task list.
- Reduce your to-do list to one list. Use a single to-do list and a single calendar to manage what you need to do.

- Work in batches. Use categories to help you group similar tasks together.
- Use good judgment when sending messages. Follow the do's and don'ts of writing great messages.
- Review your calendar and tasks regularly.

Even if you don't use all of the best practices described here, following only a few will improve your experience with Outlook for Mac 2011.

## Setting up Outlook for Mac 2011: The layout

The first step in following these best practices is to set up a system to optimize how you use Outlook for Mac 2011. It is considered best practice to have:

- The [Navigation Pane](#)  open on the left.
- Your messages in [Conversations view](#) .
- The [Reading Pane](#)  on the right.

For details on how to set up the recommended layout, see the FAQ section at the end of this paper.

## Folders

It is considered best practice to have:

- An Inbox for messages that you need to process (deal with). Your Inbox is for messages sent directly to you or that could be important for you to read. If you receive many messages that go back and forth among several different people, change to Conversations view. Otherwise, use the date arrangement (the default arrangement).
- A single reference folder, under the Inbox, for all reference material that you might want to refer back to later. Nothing is automatically filed (i.e., with a rule) into this folder. Name this folder **1-Reference**. (Adding the 1- will cause it to be the first item under the Inbox.) This folder is created under the Inbox so that you can collapse the Inbox and remove it from view.

 **Note** If this folder becomes too large (10,000 items or more), Outlook for Mac 2011 might become slow when switching to this folder.

- A folder for career-related, private, and personal messages. Having a separate folder for personal and career-related information gives you the freedom to search for a message while someone is standing over your shoulder without worrying that a personally sensitive message will appear. Name this folder **2-Personal**.

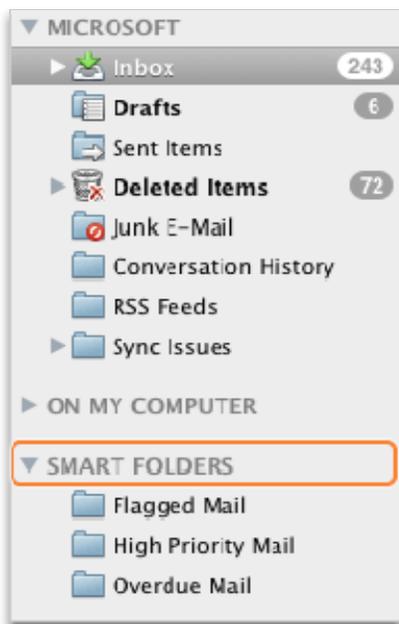
Managers might have a single folder for feedback on their employees called **3-Management**.

- A set of folders for Contact Group messages. All messages sent to Contact Groups (also known as list servers, or mailing lists, or distribution lists) don't necessarily need to be read. This set of folders is the repository for all of the Contact Group messages that are not automatically delivered to your Inbox. Create a single, top-level folder under your Inbox called **Contact Groups**, and then create a subfolder for each topic of Contact Groups. Usually, one folder per Contact Group is enough, but if you are on several related Contact Groups, consider having all of the messages delivered to the same folder. Collapse the top-level Contact Group folder so that you aren't distracted by the unread messages in the folders beneath it.

 **Note** If you need to read every message on a Contact Group, don't create a folder for it. These messages should go directly to your Inbox.

## Smart Folders

Smart Folders, also known as search folders, are useful for gathering information from across different mail folders. Smart Folders can be especially useful when you need to gather information that is saved in different folders — for example, when preparing for a quarterly meeting.



If you receive a large volume of messages (more than 200 messages a day), search folders might be a good way for you to parse mail from different senders.

For details on how to set up Smart Folders, see the [FAQ section](#) at the end of this paper.

## Rules

The goal of organizing your Outlook is to reduce the amount of unnecessary "noise" in your Inbox and to make the most important items bubble to the top. Rules help this process by moving messages into folders based on criteria that you set. Rules filter the messages coming into your Inbox for must-read items only.

It is considered best practice to have the following rules (details on how to set up these rules are in the FAQ at the end of this paper):

- **To: Me** Any message sent directly to you or with you on the Cc line is sent to the Inbox and is not processed by other rules, even if it is also sent to a Contact Group.
- **Contact Groups** Any email message sent to a Contact Group is sent to a Contact Group folder — unless its keywords suggest that it's important to you, in which case it is sent to your Inbox. Multiple Contact Groups that are similar should use the same rule and be filed in the same folder. If you are a member of a Contact Group for which you need to read every message, don't create a rule for it. Any messages that you must read should go directly into your Inbox.

## Notifications

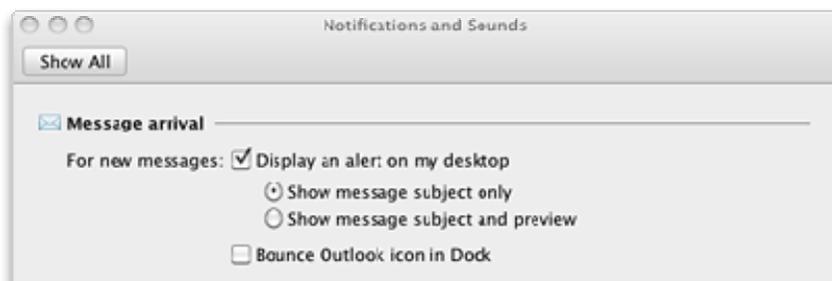
If you receive a lot of messages or are easily distracted by the notification sound that plays for incoming messages, we recommend turning off the following options:

- The mail [desktop alerts](#) 
- The bouncing icon in the Dock



- The sound that accompanies all of the above settings

To change these settings, on the **Outlook** menu, click **Preferences**, and then click **Notifications & Sounds**. Under **Message arrival**, clear all of the check boxes.



# Categories

Categories in Outlook for Mac 2011 allow you to manage items in many different ways. There are three main types of categories that we recommend creating:

- Project (can include people)
- Topic
- Location or activity

Categories are not a required aspect of this system, but they will make your life easier if you are diligent about using them. For example, they can help you more easily identify what you can do now and help you group similar tasks so that you can do them all at once.

To create categories, do the following:

- On the **Home** tab, click **Categorize**, and then click **Add New**.

It is considered best practice to have a category for:

- Each of your direct reports and your manager for items that you want to review the next time you meet (for example, a category named **1:1 Manager**).
- Each of the major locations or types of activities that you do, so that you can perform bulk actions (a useful part of managing your tasks), for example:

**@Commute** for tasks that you can do on the way home from work.

**@Email** for tasks that involve email messages, meetings, or any other aspect of Outlook for Mac 2011.

**@Home** for tasks that you can do only at home.

**@Meeting** for items that you need in order to prepare for a meeting.

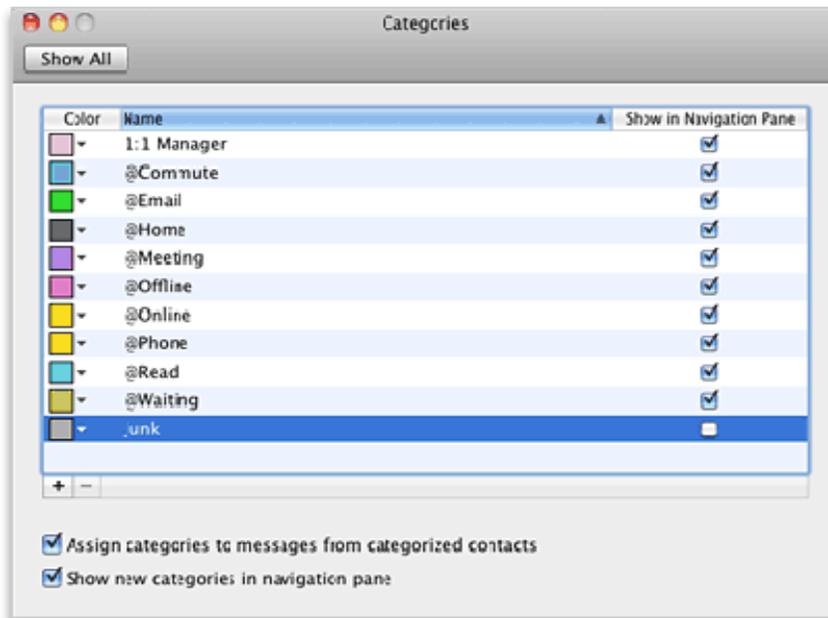
**@Offline** for tasks that take you away from the computer, such as making a copy of a document.

**@Online** for tasks that you can accomplish only online or through a Web browser.

**@Phone** for calls you have to make or receive.

**@Read** for tasks that involve just reading — not responding. This category is useful for long messages or attachments that you need to read but cannot get to right away.

**@Waiting** for messages or tasks for which you are awaiting a response, but there is no explicit next action for you.



**Note** Using the @ symbol makes the categories stand out in your category list. Marking @ before certain categories helps to keep these categories at the top of your category list and reminds you of where you should be when you are performing this task (for example, @Phone is "at the phone").

- Each important topic or project so that you can easily find messages on a given topic — especially if there is no word in the body or subject of the message that would make it appear in a search.
- Important items that must be done today and cannot roll over to another day.

**Note** You can apply multiple categories to a single item — as opposed to filing, where items can live in only one folder at a time. For example, an important message that you want to discuss with your manager before you respond might be categorized with both the @Email category and the 1:1 Manager category.

As you will see, categories help make searching more efficient, and help you get ready for meetings.

**Note** Be very careful about categorizing your outgoing messages — your recipients might be able to see your categories. If your recipients are not using Outlook for Mac 2011 or Exchange Server 2010, they will be able to see the categories you set.

## Tame your Inbox with the four Ds

Once you set up your system, you are ready to begin managing incoming messages. By making your Inbox the central place for receiving important messages, you can go through it with the confidence that each item is something you need to deal with.

For every message in your Inbox:

- If it isn't important, delete it immediately.
- If it can be done in two minutes or less, do it (reply, file, call, etc.).
- If it isn't for you or if you can, delegate (forward) it.
- If you need to do it, but it takes longer than two minutes (including reading), defer (hold off on) it.

If you need it as reference (even if you have decided to defer it), move it into your reference folder. The goal is to reduce the number of times you touch each message.

### Delete it

Delete messages that you don't need to read. If it is junk, delete it.

### Do it: The 2-minute drill

It is amazing what can be done in two minutes. For example, many messages can be responded to in 2 minutes or less. But if a message takes longer than two minutes to deal with, defer it. To get a sense of what two minutes feels like, try timing yourself.

After you have dealt with the message, do one of the following:

- Delete it if it is something of little consequence.
- File it in one of your reference folders (for example, **1-Reference**).

### Delegate it

Sometimes you receive a message that is really meant for someone else to deal with. In these cases, reply and include the person to whom you are delegating the message on the To line.

If you want to follow up later, [flag it](#)  for yourself before sending. Mark the task with the **@Waiting** category.

## Defer it

### WHEN TO DEFER A MESSAGE

Deferring a message means that you will review it later, when you have time, and the reasons to defer a message are:

- It cannot be dealt with in less than two minutes.
- It will take a while to read.
- It will require a carefully crafted response.
- It requires additional action in another program (for example, "Need to add to <name> document")

### HOW TO DEFER A MESSAGE: FLAG IT

When you decide that you don't have time to deal with a message right away, you can flag it:

- If you need to do it today, flag it for **Today** (just click the flag).
- If you can put it off for longer, hold-down ⌘+CONTROL, click the message, and then flag it for follow up for a later date.
- If you will need to refer to the message more than once and you want easy access to it, set the flag **Start Date** on the task to 100 years in the future. (Use this flag rarely so that it does not become an overpopulated catch-all.)
- If it is something you will need in the short term, flag it **No Due Date** so that it appears at the top. Use this group sparingly and clear it out regularly, because it is at the top of your task list.

By flagging it and filing it into your reference folder, you have processed it, and now you can move it out of your view. But because it is in your task list, you can move on to your next message, knowing that you will return to your flagged items later.

### IF YOU WANT TO CATEGORIZE YOUR FLAGGED ITEMS

You can add a category to help you see at a glance where your next action is. A quick glance at your tasks that are categorized lets you know what is immediately actionable (**@Office**), which tasks you are waiting on other people for (**@Waiting**), and what you will be meeting about (**@Meeting**).

### WHEN DO YOU DEAL WITH THE TASKS YOU HAVE DEFERRED?

After you process your messages, you can tackle your task list. This is when you respond to those messages that you have deferred.

### JUST FILE IT

Sometimes you receive a message that you don't need to act upon, but which you might need at a future date. A good example is a message with instructions. File these messages in your reference folder (**1-Reference**). Adding a category will make the message easier to find later if you need it (for example, **@Project**). Do this before filing.

After you finish processing your messages, you should have a clean Inbox and can switch your focus to your calendar and tasks.

## Daily review: Managing your time and tasks

It is considered best practice to set aside time every morning to manage your task list and your calendar. This includes:

- Reviewing your appointments and meetings for the day and week ahead.
- Reviewing your tasks and making adjustments.
- Adding appointments to your calendar to make time to get your work done.

### Saying no

As you review your calendar and your task list, be realistic about what you can accomplish. Sometimes that means saying no. Here are some ways to gain back time by saying no:

- Decline meetings that you don't need to attend. Yes, you can do this.
- Delete tasks that you don't need to do or that you know you will not do.
- Send messages to let people know that you are working on a response (and make sure to flag it for yourself on send). It is better to let someone know that you will respond by a realistic date than have the person think that you forgot about the request.

### Calendar management

The reality is that if you have a day filled with meetings, you have less time to complete tasks and write messages, so move tasks to other days.

If a task is going to take a long time or if it is something you must do (as opposed to tasks you decide you don't need to do), block off time on your calendar.

### Ways to create tasks

As you go through your calendar and tasks, inevitably you will start thinking of more things you need to do. Here are some ways to [create tasks](#)  in Outlook:

- Flag the message.
- In the ribbon, click **New** and then click **Task** to create a new task.
- If you are driving, and it is legal and safe to do so, use the voice memo function on your mobile device or mobile phone to record your tasks and transcribe them later into your Task List.

### Ways to manage tasks

Here are ways you can help yourself deal with your tasks:

- Add tasks as they come to you by clicking **New** and then **Tasks** in the ribbon.
- Clean out tasks that you don't need to do. Your task list is your sacred space — don't let it get polluted, or its utility will be lost. For flagged messages that you want to keep, click **Clear Flag**, otherwise, just **Delete**.
- Mark completed tasks complete so that they are removed from the Tasks list.

- Make tasks more actionable by changing the task subject. For example, a task with the subject line **Cannot change group membership via keyboard** should be renamed **Reply to Ryan**, which is the next action for this task. To change the task subject, double-click the task, and then type a new subject.
- [Apply categories](#)  to help you identify where you need to be to take the next step and to make some tasks stand out.
- Rearrange your tasks to group together similar tasks, such as tasks with the same category. In this way, you can work on similar tasks together.

Although it is good to be organized, don't spend a lot of time prioritizing and managing your task list. The process of managing your task list shouldn't take over your life!

## Use your calendar: Create appointments for managing your time

Remember: There is always more to do than time to do it.

As part of good time management, you need time to deal with your messages, manage your appointments and tasks, and reflect on what you have to do.

You can schedule this time for yourself with regular appointments and meetings on your calendar. Your calendar should be treated as your real plan for your time — if you have scheduled it, then that is what you are committed to doing at that time.

Set aside time to:

- Deal with your messages. Setting aside time to deal with messages is especially important if you receive a lot of messages. Even if you have rules set up so that only the important messages appear in your Inbox, you still need time to deal with those messages.  
 **Tip** When processing and reading your messages, remove visual clutter by minimizing the navigation pane and ribbon.
- Do a daily and weekly review of your tasks and appointments. Look at your calendar and tasks, and evaluate your appointments and tasks against your priorities. If you have a busy calendar, this is the time for:
  1. Clearing out conflicting appointments, because you can't be in two places at once.
  2. Scheduling time to do work.
  3. Reflecting on what you're doing, whether it's a valuable use of your time, and whether you're setting the right priorities.
  4. Meet regularly with your manager. Regular meetings with your manager can help you explain what you are working on and reset priorities where needed. To set up a recurring meeting, click **Recurrence**.



# Tasks: Doing your work

## Weekly review

Looking at the whole picture of your time and your tasks will help you to prioritize important work over less urgent tasks. It will help you to make it clear to others what can and cannot be realistically expected of you to accomplish. Reviewing your past week and upcoming week is also a useful way to help you prepare for a weekly meeting with your manager or help you prepare a status email message.

## Where to do your work

After you have processed your messages, the best place to do work in Outlook (reply to messages and so on) is in Tasks. By switching to Tasks, you won't be distracted by messages arriving in your Inbox.

## Bulk process your tasks

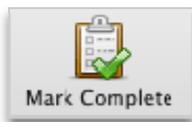
As you go through your task list and your calendar, do similar tasks together. For example, if you have only a few minutes, make all of your phone calls (if you have just a few). Tackle energy-intensive tasks (for some, that might be responding to messages) when you have more energy. Deal with your low-energy tasks, such as reading status messages, later in the day or whenever your energy is lower. By "bulk processing" your tasks, you will make progress on all of your projects simultaneously.

One way to bulk process tasks is to change the arrangement from **Start Date** to **Categories**. To do this, click the **Categories** column heading.

 **Note** If you have tasks that are blocking other people from getting their work done, do those tasks first.

## Finishing your tasks

As you finish your tasks, mark them complete. Outlook for Mac 2011 keeps the list of your completed tasks automatically. This can be a useful summary of what you've accomplished. If you don't need to keep a record of the task or the message, delete it or clear the flag.

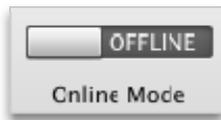


## Working offline

If you have a lot of work to do, consider going offline to stem the tide of incoming message distractions. When you switch between working online and offline, all email accounts within your Outlook profile are changed.

- On the **Outlook** menu, click **Work Offline**.

The **Online Mode** toggle on the **Tools** ribbon shows that you are working offline.

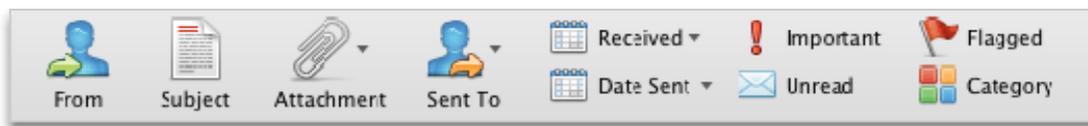


Click the **Online Mode** toggle to return to Online mode.

## Find that message: Searching effectively

### How to find a message from a particular person

If you want to find a message from a particular person, click in your reference folder (for example, 1-Reference), click in the **Search** box, and then on the **Search** tab, click **From**.



Type the person's name.



**Note** You can also click in the **Search** box, type **ryan**, and then in the list, click **from ryan**.

### How to find a message with an attachment

To find a message with an attachment, click in the **Search** box, and then on the **Search** tab, click **Attachment**.



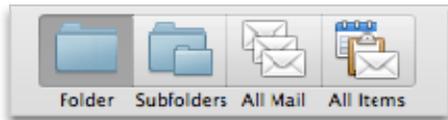
All search terms are additive, so if you want to find a message from someone with attachments, click on the commands on the ribbon (**From**, **Attachment**) to build your search.



## To find messages across your whole mailbox

Sometimes you can't find a message by only searching in your reference folder alone — it could be a message that you sent or it could have been misfiled. In these cases, start by searching in any folder (**Inbox**, **1-Reference**, etc.) and then click **All Mail**.

If you suspect that what you are looking for might be in an accepted meeting request (and therefore is on your calendar), try upscoping to All Items.



## To stop searching

Once you have found the item that you are looking for and are ready to move on to your next task, on the **Search** tab, click **Close**.



# Write great email messages

The following rules will help you look professional and get your message across.

## Basic rules of great messages: The dos

- Read your message before you send it.
- Make your subject descriptive and action-oriented. For example: **Sales Team, Please send proposed Board Retreat Dates**, where **Sales Team** is the name of the group, and **Please send** is the action. Other useful prefixes include **FYI**, and **Action Required**.
- If action is required, state what you want in the **Subject** box.
- Change the subject of the message if the topic of the conversation changes.
- Keep all messages short and to the point.
- Organize the content of your message from most important to least.
- Consider bolding important information.
- Put action items or questions on separate lines so that they stand out and get noticed.
- Bold people's names when asking questions. For example: **"Ryan: What is the status of the project?"**
- Limit the number of people to whom you send a message to those who need to read it.
- Put people who need to be informed on the Cc line.
- Put people who need to respond or take action on the To line.

- Use a signature when appropriate, but keep your signature simple, short, professional, and if possible, free of graphics.
- If you want an immediate response, don't send a message. Phone or send an instant message.
- If you are on an email conversation that has more than 10 messages without a resolution, consider setting up a [meeting to discuss](#) the issue. Email is not always an efficient medium for resolving complex issues. With the message selected, on the **Home** tab, click **Meeting**.



- Acknowledge messages that require a more extensive response. If you are too busy to respond with a full answer right away, let the sender know that you are looking into the issue and will respond by a certain time or date. Flag it for yourself to do later.
- Use **High Priority** sparingly.



- If you are asking a question and there are several people who could respond, choose just one person rather than sending your question to a group.

## Follow up: Flagging on send

When you are sending a message to someone from whom you need a response, do the following:

- Flag it for yourself on send.
- Mark it with the **@Waiting** category.
- When you take these steps, you know that your next action is to send another message or watch for a response.

 **Tip** Reminding yourself to send another message is often more effective than flagging the message for your recipient. Similarly, when you promise to do something in a message, flag it for yourself so that you have a task in your Task list to remind you.

## Basic rules of great messages: The don'ts

- Don't include your manager on every message you send.
- Don't send a message when you are angry. Better to write it, save it to your drafts folder, and come back to it later.
- Don't expect a quick response when sending long messages (more than two paragraphs).
- Don't send a follow-up message less than a day after the first message. If you don't hear back in a timely manner, try using the phone or Instant Messaging.
- Don't attach flags to every message you send. Your recipients will learn to ignore them.
- Don't use ALL CAPS.
- Don't send attachments — send links instead. This rule applies especially to meeting requests, where attachments can contribute significantly to server quotas.
- Don't expand contact groups (distribution lists). Expanding contact groups (distribution lists) makes messages harder to read and causes them to go into the wrong mail folders for people using rules.
- Don't use sarcasm. Your humor might be misunderstood.
- Don't write something you wouldn't want everyone in your company to read. You never know where your message might end up.
- Don't use cursive or "funny" fonts that are hard to read.
- Don't use red fonts, because they are hard to read and can be interpreted as being critical.
- Don't use Reply All to a Contact Group asking to be removed.

## Advice for Contact Groups (also known as Distribution Lists)

If you are responding to a large Contact Group, follow all of the message Do's and Don'ts.

If you need more information or are investigating the issue separately, respond to the whole Contact Group to let everyone know that you are responding and then reply to the individual separately. Make sure to respond to the Contact Group after the issue is resolved with the resolution. In this way, the resolution can be referenced by other people on the Contact Group.

## How to redirect people

If someone sends a message to a Contact Group that you are a member of and the message would be better answered by someone else or another Contact Group, do the following:

- Reply with the correct Contact Group or person on the **To** line.
- Have replies sent to the correct Contact Group or person.
- Don't put the original Contact Group on the **Bcc** line, because your message will not be filtered by other people's rules. Rather, leave the Contact Group on the **To** or **Cc** line.

## How to be removed from a Contact Group

If you receive mail from a Contact Group that you don't want to be on, send a message to your network administrator or to the owner of the Contact Group and ask to be removed. Don't reply to the whole Contact Group.

## How to use inline comments

Adding inline comments to a message that you receive is a convenient way to answer questions and respond directly to issues. It is considered a best practice to do the following:

1. In your message, mention that you are commenting inline. For example, include "See additional comments below."
2. Differentiate your text from the original message. Some suggestions include:
  - o Changing the font color.
  - o Pre-pending your name or initials in brackets, for example, [Scott Mitchell].



- o Changing the font to italic or bold or both.
3. Don't delete anything you did not write.

If you only want to comment on a small part of a longer message, copy that section of your message into your response, using a different color and prefixing the quote with quotes, and then type your response.

## When to use Bcc

If you add a recipient's name to the blind carbon copy Bcc box in a message, a copy of the message is sent to the recipient, but the recipient's name is not visible to the other recipients of the message.

Use the Bcc feature to remove extra people from an email conversation when you deem that they no longer need the extra email or if the conversation topic has changed.

For example, if you are one of five people who receive a question and you want to answer it, move the other four people to the Bcc line and write something such as "**Bcc'ing Joe, Jeff, James, and Jennifer. Here's the answer...**" Future messages will then be between only you and the original sender.

Don't use Bcc to let a third party (such as your manager) know about a sensitive message. The Bcc recipient might not realize that he or she has received a Bcc and might respond to everyone, exposing that he or she received a Bcc message. This might come across as sneaky behavior on your part.

Rather than using Bcc to inform a third party of an issue, forward the message after you send it.

# Calendar and meetings

## When is it appropriate to call a meeting?

Call a meeting when:

- A new group of people is working together for the first time.
- More than 10 relatively long messages have gone back and forth among several people.
- Discussion, brainstorming, or collaboration is needed.
- Call a meeting when it is the most efficient way to move forward, and be clear what the objective of the meeting is before you call the meeting.

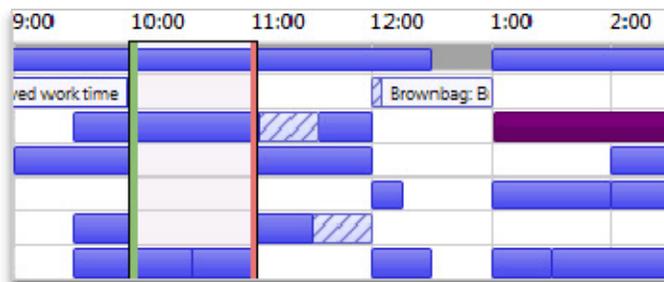
## Whom to invite

Only invite people who need to be involved. Each additional person you invite to a meeting adds to the complexity of the meeting, making it harder to control. On the other hand, if a decision needs to be made, make sure all of the key stakeholders are present, or the meeting will be a waste of time and resources.

## How to choose a time to meet

Choose a time when everyone can meet by looking at the invitees' free/busy information in Calendar. Use **Scheduling** to view all meeting attendees availability.

The free/busy grid shows the availability of attendees. A green vertical line represents the start of the meeting. A red vertical line represents the end of the meeting.



To view Scheduling when composing a meeting request, do the following:

- On the **Meeting** tab, click **Scheduling**.

## When to meet in person versus remotely

Meet in person if:

- It is the first time this group will be working together.
- Non-electronic items will be shown or passed around.
- It is a brainstorming meeting.
- It is a collaboration-intensive meeting.
- Not everyone has a phone or the proper electronic meeting software and equipment.

Otherwise, meet by phone.

 **Tip** If you are traveling to the meeting location, schedule travel time on your calendar before and after the meeting.

## How to handle related documents

In preparing for a meeting, often there are documents to be shared before or during the meeting.

If all of the attendees are connected to your corporate network, put the documents on a SharePoint site or on a shared network drive.

Don't send attachments in your meeting requests.

## Preparing an agenda: Let tasks help

- **@Meeting is your central spot for agenda items.**

Create a single task, mark it with the @Meeting category, and set the Start Date or Due Date to the date of your meeting. As the meeting date approaches and discussion points come up, add comments, bullets, and thoughts to the task as they occur to you. This task will become your agenda for the meeting.

After the meeting, mark the task complete, and create new tasks for your action items.

- **If you want to discuss a set of messages or just one message...**

If you have a message you want to discuss at a meeting, flag that message for the day of the meeting and mark it with the @Meeting category.

If you have more than three messages to discuss, don't flag each one because they will pollute your task list. Instead, create a new task with the name of the meeting: copy each message into the task. Mark this task with the @Meeting category.

## During the meeting: How to collaborate

The tool that you use to collaborate during a meeting depends on the location and access of your participants.

If you are collaborating on a document and everyone is in the same room, use the Track Changes and Comments features in Word.

If you are presenting and some people are remote, you can share your screen with other computer users with the Mac OS System Preferences called Sharing.

## How to end a recurring meeting

When a series of meetings has run its course, rather than cancel the meeting, which will remove all historical instances of the meeting, change the recurrence pattern to end on the last occurrence of the meeting. To do this, click the Recurrence button and change the end date.

## When and how to share your calendar

You might not need to share your calendar, because everyone in your organization can see when you are free or busy but not necessarily see the content or subject of the meetings and appointments. However, you can easily share your calendar with your team if you want them to be able to see all of your meetings and appointments.

You might want someone else to manage your calendar on your behalf, for example, an assistant who can accept or decline meetings for you. In that case, you can delegate your calendar. If you delegate your calendar, choose only one person: Don't make everyone a delegate of your calendar. Having more than one delegate can cause errors in your calendar.

 **Note** Whether your calendar is shared depends on the version of Microsoft Exchange Server your system is running and how your administrator has configured the server.

# Contacts

## When to use Outlook for Mac 2011 Contacts in a corporate environment

Even if you work for a company with a Global Address list, there will be occasions when you want to keep a contact in Outlook for Mac 2011. Create contacts for:

- People who are outside your company.
- People for whom you want to remember something or add information to their contact, such as their birthday.
- People whom you want to sync to your mobile phone, especially if your phone is not connected to your corporate address book, or for cases where you don't have connectivity.

## When to create a Contact Group in Outlook for Mac 2011

Create Contact Groups in Outlook for Mac 2011 when you want to make it easier to send messages to a group of people outside your corporation. For all groups inside your corporation, create a public Contact Group (ask your IT administrator about how to do this).

## Frequently asked questions

### **Why show the Reading Pane on the right and not the bottom (or off)?**

Reading a longer column of narrow text is easier than reading a shorter, wider section of text. This is because it is easier to move your eyes down than left to right over long distances, which can cause you to move your head and neck and lead to fatigue. It is better to have the Reading Pane on, so that you don't have to open each message to read its contents.

### **What to do with folders I don't need anymore?**

The Navigation Pane folder list should be reserved for folders you use often. If it's filled with folders you don't even recognize, move all mail into the reference folder and delete your existing folders.

### **When should I use conversation view?**

Conversation view is useful when:

- You check your messages less frequently, and therefore have more messages to view at a time.
- You have many message threads that have a lot of back-and-forth discussion.
- You need to see the context of who has responded to whom.
- You get a lot of messages.

By viewing your messages in conversation view, you can easily see which conversations have had the most back-and-forth discussion. In those cases, you might want to read and respond to only the last message in the conversation. You can also select an entire conversation and act on it. For example, there might be a lengthy series of messages where the last one simply states, "Thanks, that answers my question," so you can just delete the whole conversation.

You can also see messages from other folders when you are in conversation view, which is very helpful when you receive a new message on a lengthy conversation — you can see the whole history, including your replies.

### Should I keep personal and business messages together?

Reducing the number of places where you read messages doesn't mean that you should mix your work and personal messages. A best practice is to use separate mail accounts for work and personal communications. You should, however, reduce the number of email addresses that you have to deal with. Fortunately, with Outlook for Mac 2011, you can view multiple accounts simultaneously. You can view your work messages (Exchange Server), your Windows Live Hotmail, and Google Gmail account, all while working in the same profile in Outlook for Mac 2011.

To make it easy to read messages from different accounts, Outlook for Mac 2011 has a unified inbox that groups similar folders, such as inboxes, from all of your accounts. This makes it easier to read all your messages at once, without having to move around between account folders. If you want, you can turn off this feature so that each account and all its folders are separated in the folder list.

We recommend you turn off the unified inbox.

- On the **Outlook** menu, click **Preferences**, click **General**, and then clear **Group similar folders, such as Inboxes, from different accounts** check box.

### How do read and unread states help me?

Read and unread states in Outlook for Mac 2011 help by showing you quickly which messages have been read at least once and which have not. However, the read and unread states of messages can easily be triggered by clicking around your messages so they are not a perfect record — just a tool.

To quickly mark a message as read or unread, open the message and then on the **Message** tab, click the **Read** or **Unread** button. The button changes based on the current status of the message. If you want to see only the unread messages, on the **Home** tab, click the arrow next to **Filters**, and click **Unread**.

### Why isn't read/unread state enough?

Some people try to use the read and unread states to indicate whether a message is new or a reference item. But unread state is unreliable, because as soon as a message loses focus (when you click another message), it is automatically marked as read and far too often other devices (phones, for example) mark messages as read. Inevitably, messages will be reread, and the mental tax of figuring out what you need to do will be paid again. Using unread/read state as the "line" between those items in your Inbox that are "tasks" and those that just haven't been processed tends to break down when you receive many messages, some of which you will never read because you can tell by looking at the subject that you don't need to read them. A far more efficient Inbox plan is to go through your messages and decide what to do with each one. Then it should leave your Inbox — not remain "unread."

### Why should I file my messages?

It is a best practice to have a central repository for your messages, so that you can refer to them after you've "dealt" with them. By having a limited number of folders to look in (**1-Reference** and **2-Personal**), you don't have to worry about misfiling a message or needing to copy it into multiple folders if it applies to more than one topic or project. That's not to say that there isn't a need for browsing through messages that are all on a particular topic or project. Outlook for Mac 2011 provides better tools — such as categories and Smart Folders — so you can search effectively.

### Why should I have only one reference folder?

By having a single folder, you don't have to think about which folder holds which messages, and you know that everything in this folder is something that you have looked at before and wanted to keep.

Having multiple folders means that each time you file a message, you are forced to decide which folder to use. This becomes even more complicated if there is more than one appropriate folder per message. Since many folders go unused when there are multiple choices, this creates clutter.

Although it might not seem like a big deal to leave all of your messages in your Inbox, there is a hidden cost you pay every time you look at a message and wonder, "Is this something I have to deal with or is this just here for reference?" There is also peace of mind gained from having an Inbox filled only with new things. Your Inbox is a place that other people can manipulate; what you put in your reference folder is strictly up to you.

### Why do I need different folders for Contact Groups?

- **Different delete schedules**

You should have different folders for different Contact Groups based on topic and frequency of scheduled deletions. For example, if you are on a carpooling Contact Group, the messages in the Carpool folder should be deleted daily. A Contact Group covering a work-related topic should be deleted less frequently, such as annually.

- **Efficient conversation grouping**

When you have separate folders for topical Contact Groups, you can see entire conversations grouped together. Should you need to, you can efficiently search within a folder.

### Which Contact Groups should go to a folder instead of my Inbox?

Good candidates for a Contact Group rule and folder are Contact Groups that:

- Receive a lot of messages.
- Are directed to many people.

Corporate-level messages with important news (for example, from the CEO) and messages from your IT department about server downtime should not go into a folder. Messages to a Contact Group that only occasionally contain useful or interesting content, regardless of frequency, should have a rule and a folder.

### How do I set up the "To: me" rule?

1. On the **Tools** menu, click **Rules**.
2. In the left pane of the **Rules** dialog box, under **EXCHANGE SERVERS**, click the account name.
3. In the **Rules** dialog box, click **Add a rule** .
4. Under **When a new message arrives that meets all these conditions**, on the first pop-up menu, click **Sent To**, and then on the second pop-up menu, click **To or CC Me**.
5. Under **Do the following**, on the first pop-up menu, click **Move to Folder**, and then on the second pop-up menu, click **Choose Folder**.
6. Type **Inbox**, and then click the **Inbox** that you want.
7. Select the **Do not apply other rules to messages that meet the same conditions** check box.

### How do I set up the “Contact Groups” rule?

For each contact group that you are a member of where you don't have to read every message, create a rule.

1. On the **Tools** menu, click **Rules**.
2. In the left pane of the **Rules** dialog box, under **EXCHANGE SERVERS**, click the account name.
3. In the **Rules** dialog box, click **Add a rule** .
4. Under **When a new message arrives that meets all these conditions**, on the first pop-up menu, click **From**, and then on the second pop-up menu, click **Is**.
5. In the text box, enter Contact Group name and then select it from the list provided.
8. Under **Do the following**, on the first pop-up menu, click **Move to Folder**, and then on the second pop-up menu, click **Choose Folder**.
6. Type the Contact Group folder name, and then click it.
7. Repeat steps for each Contact Group.

 **Tip** If you can think of no reason that you would want an email message sent to this contact group to be sent to your Inbox, consider asking to be removed from the Contact Group.

### Why should I use rules?

As time goes on, you will likely receive more and more messages. You cannot read every message you receive — nor should you try to. Rather, just read the messages that are important for you to read. Rules will help you prioritize important messages and minimize distractions.

### What should I do with unused categories?

Delete all of the categories that you don't plan to use. The same category set applies to all items, so if you use a category for contacts, keep it.

### What's the best way to choose colors?

When creating color categories, be thoughtful in your color choices. For example, don't choose the same color for **@phone** as **@email**, but do choose similar colors (shades of green, for example) for all of your 1:1 categories. Over time, you will be able to look at your task list and determine just by color whether the task is presently actionable. For example, if **@Home** is purple, and you are at work, you can't do any purple tasks.

### Why schedule time for myself?

By scheduling time for yourself on your calendar, your free/busy information will be updated and people will be less likely to schedule you for that time. If you have a busy calendar, this might be the only way you can get dedicated time to do your job.

It also helps you to make a commitment to doing work — if you put it on your calendar, you should be committed to doing that work at that time. If someone schedules over your work time, make sure to reschedule your time. Don't cheat yourself!

### **How do I handle the 10,000 messages in my Inbox?**

If you have more than 20 items in your Inbox, process the last week of messages and then select the remaining messages and move them to your **1-Reference** folder. Yes, you can do this, and it will feel great.

### **Why do I get so many messages?**

If you feel overwhelmed by messages, you are probably receiving more than you can possibly handle, and you might need to set up more aggressive rules. Try analyzing where your messages are coming from by arranging your messages by From and then collapse all of the headers. Are you reading Contact Groups that you don't need to read? If so, create a rule. If you change your view, don't forget to change it back!

### **I have 10 minutes: What should I read first in my Inbox?**

If you are short on time, for example, between meetings, you can read the messages with **Any Recipient is Me** – messages sent directly to you. Often these messages are waiting on you for the next step and are the most important.

- On the **Home** tab, click **Filters**, and then click **Any Recipient is Me**.

### **How often should I read my messages?**

For many of us, reading messages is nearly an addiction. Spend 20 minutes in the morning going through your messages, and then turn your attention to doing a daily review of your task list. Then get on with your day! Limiting the time you spend reading messages to once in the morning and once at the end of the day could significantly improve your productivity. Try it for a full week and see for yourself.

### **How can I manage complicated tasks?**

If you just want to remember a few related tasks, list them in the body of the task

### **Should I keep personal and business tasks together?**

If possible, keep your personal and business tasks in one place. Keeping one list reduces the number of places that you need to look for what needs to be done. Even if you already have only one list, use categories to sort your personal from business tasks and manage your list effectively. Your personal tasks will be stored on your company's Exchange Server and could be visible to your IT department, so only put appropriate personal tasks on your list.

### **What's wrong with keeping tasks in my head?**

Keeping tasks in your head doesn't work. It is liberating to depend on Outlook for Mac 2011 instead of your overtaxed brain to keep track of your tasks. You can stop spending brain power reminding yourself of your tasks ("Okay, remember to send John a message about the templates, send John a message about the templates...") and focus on the activity at hand.

### **Why keep my tasks in Outlook for Mac 2011?**

Why a task list in Outlook for Mac 2011 works better than a paper list:

- Paper lists can't automatically be kept up-to-date.
- Paper lists can't be easily rearranged.
- You can use Outlook Web App to view your task list from anywhere.
- Paper lists can be easily lost.

**Advanced: How do I create a Smart Folder for email messages?**

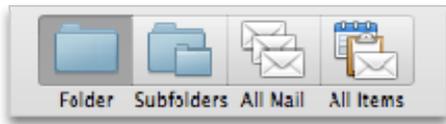
A Smart Folder, also known as a saved search or a search folder, is a virtual folder that dynamically displays a set of search results. For example, you could create a search to find all the items in the Manager category that are flagged for follow up but not yet completed. This search can be saved as a Smart Folder so that you can use these search criteria later without having to manually recreate the advanced search.

1. In the upper-right corner of the Outlook window, click in the search box



The Search tab appears.

2. Define the scope of the search by clicking a scope button on the Search tab, such as **All Mail** or **All Items**.



3. On the Search tab, click **Advanced**, and then define your search criteria.



4. On the Search tab, click **Save**.



The Smart Folder appears in the navigation pane.

5. Type a name for the Smart Folder.

### Notes

- To edit the criteria used for a Smart Folder, hold down CONTROL, click the Smart Folder, and then click **Edit**. When you are done changing the criteria or scope of the search, on the Search tab, click **Save**.
- To delete a Smart Folder, hold down CONTROL, click the Smart Folder, and then click **Delete**. Deleting a Smart Folder does not delete any of the items in the Smart Folder.

## References

There are many excellent books and philosophies of time management from the following sources:

### Books and other resources

- [McGhee Productivity Solutions](#)  offering consulting services and eLearning products
- [The 7 Habits of Highly Effective People Interactive Edition](#)  by Stephen R. Covey
- Getting Things Done (GTD) System, available from [David Allen & Company](#) 
- [Total Workday Control Using Microsoft Outlook](#)  by Michael Linenberger
- [Lifehacker](#)  Tips and downloads for getting things done

### Additional online resources

- [Video: Customize and manage your inbox](#),  Outlook for Mac 2011 training course
- [Tutorial: Outlook basics](#) , Outlook for Mac 2011 training course
- [How Bill Gates Works](#) , Fortune 500 magazine on CNNMoney.com