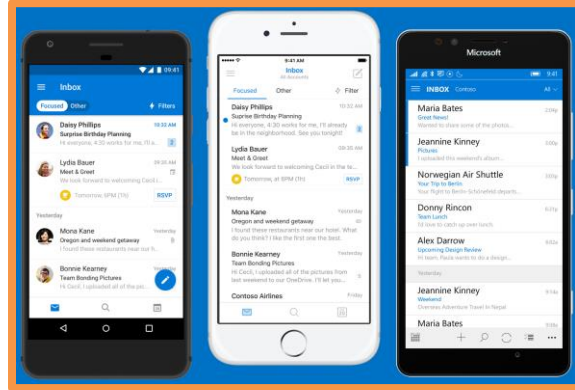
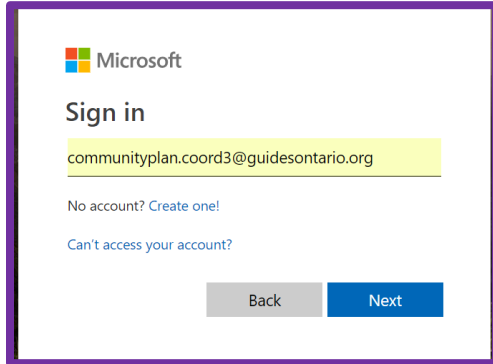


Outlook Tips and Tricks

Platform

- ACL emails are accessible from the Outlook Website and the Outlook App
- Can also set up outlook in your phone's default mail app.



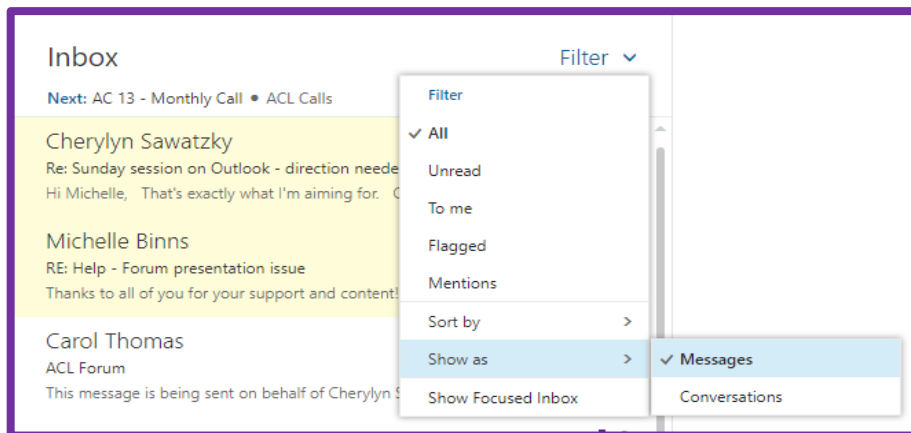
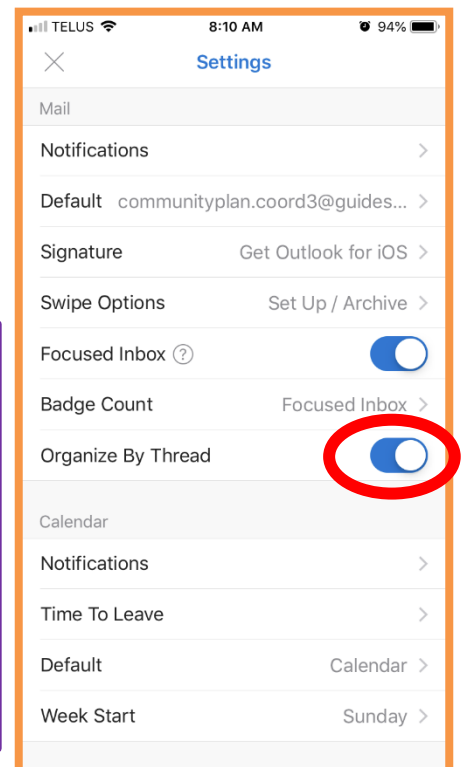
Viewing Emails – Conversation vs. Messages

Messages:

- Each email received will have a separate line in the inbox

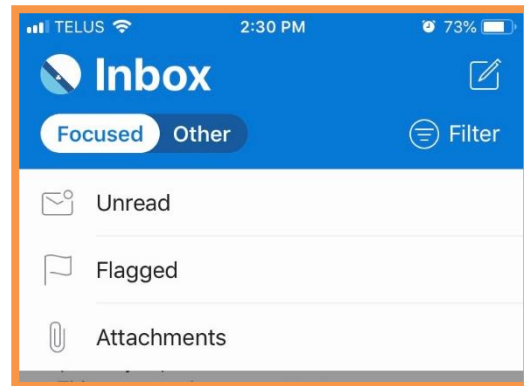
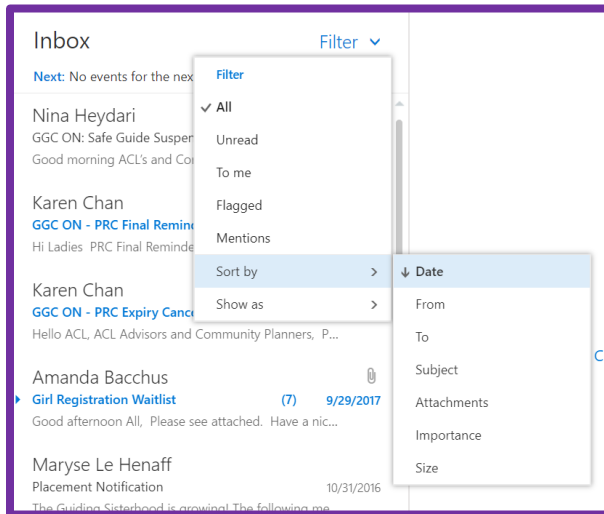
Conversations/Thread:

- Will group by Conversation history to put emails chains together
- May be useful to find the history on an email, or the email chain – as it will pull any related emails regardless of their folder.
- Note: if there are side conversations, or changes to the subject line, it may or may not get pulled in – need to be careful when replying to emails.
- Any mail merged items, such as placement notifications from the CPCs, or any items with the same subject line, may also get pulled into the Conversation view.



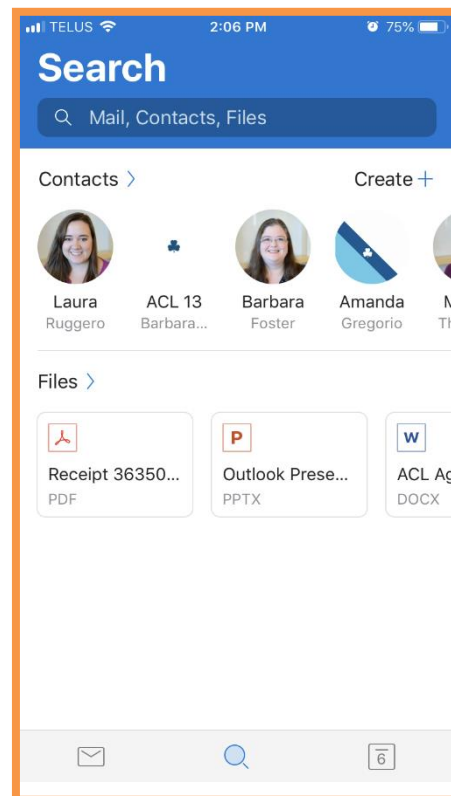
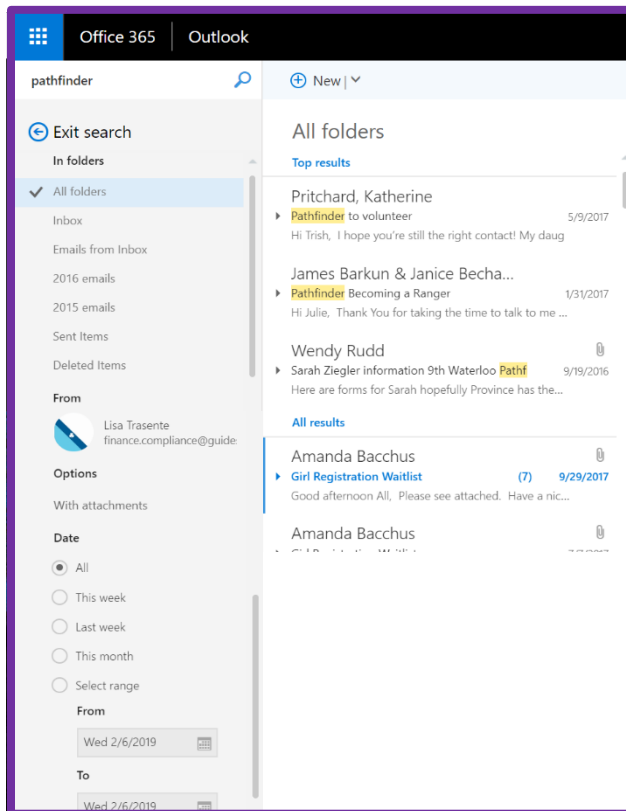
Sort/Filter Emails

- Outlook online: allows you to sort and filter the emails in your inbox, or folders, in a variety of ways depending on your need – subject, sender, date, etc...
- Outlook App: sorted automatically by date received – with new emails on top. You are able to filter these to show only unread emails, or only “flagged” emails



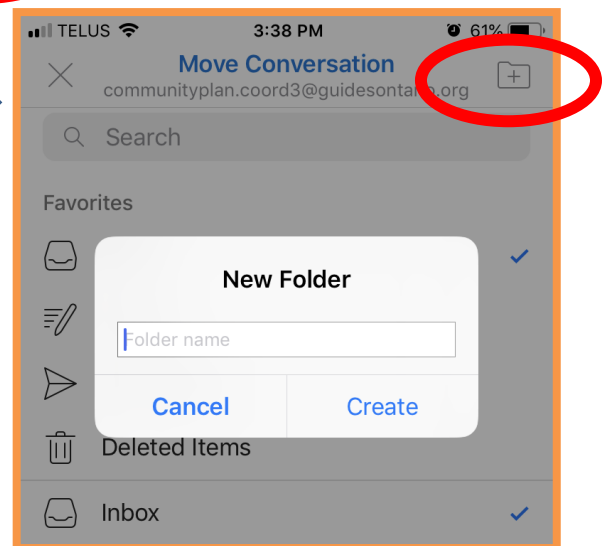
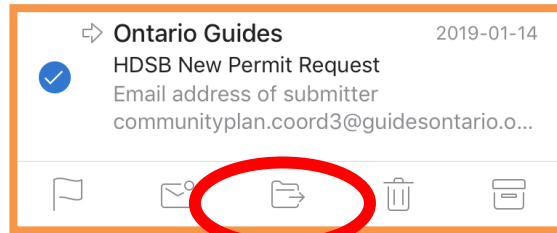
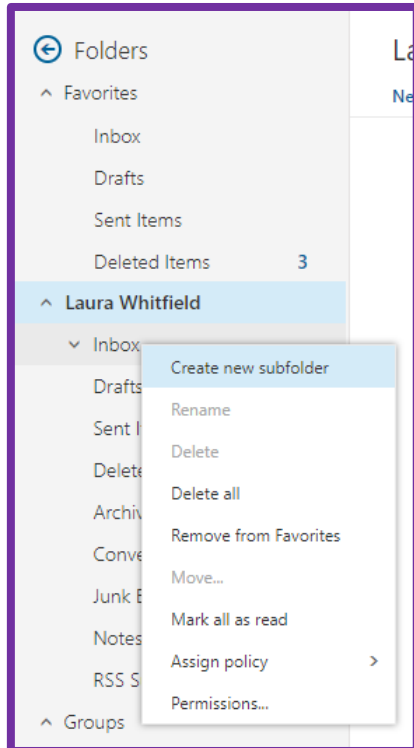
Search

- Can search for an email by: key word, iMIS number, Unit name, Guider name, etc
- Outlook Online: the results can be filtered in a variety of ways - including the folder they are in, who the message is from, if there is an attachment, as well as a date range.
- Outlook app: the only filter you can apply is the presence of an attachment or flag



Setting up folders and sub folders

- Folders and subfolders can be set up to help keep the email account organized, and move items out of the inbox
 - BEST PRACTICE: Only items requiring action are stored in the inbox.
- Some ideas: by unit, by town, by theme (Safe Guide suspensions, PRCs, events, eNews, Issues), or a combination of these)
- Outlook App: Setting up and moving folders is more difficult in the App – select an email – select the folder image to file, create a new folder from this screen.
- Outlook Online: right click on the location you wish to create a new folder. Folders can be moved by dragging and dropping within other folders.



Rules (Online Only)

- Rules can be created to automatically move emails to other folders
- Email will appear in the new folder as unread
- This may be beneficial for emails that come in regularly, and may not require immediate ACL attention

The image shows two parts of the Outlook interface. On the left, a list of emails is displayed. A context menu is open over one of the emails, with the 'Create rule...' option highlighted. On the right, the 'New inbox rule' dialog box is shown. The 'Name' field is set to 'E-NEWS'. The conditions section is configured with three criteria: 'It was received from...' set to 'Girl Guides - Ontario', 'and it was sent to...' set to 'ACL 7', and 'and it includes these words in the subject...' set to ''Guide ON' or 'Guide ON Event News''. The actions section is set to 'Do all of the following' with 'Move the message to folder...' set to 'Reference'. There is also an option to 'Stop processing more rules' which is checked.

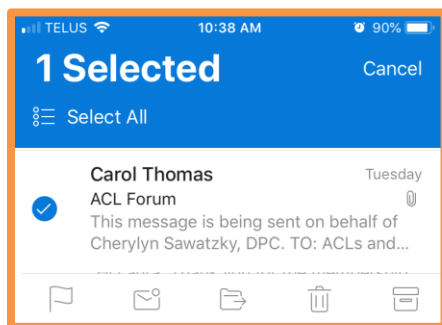
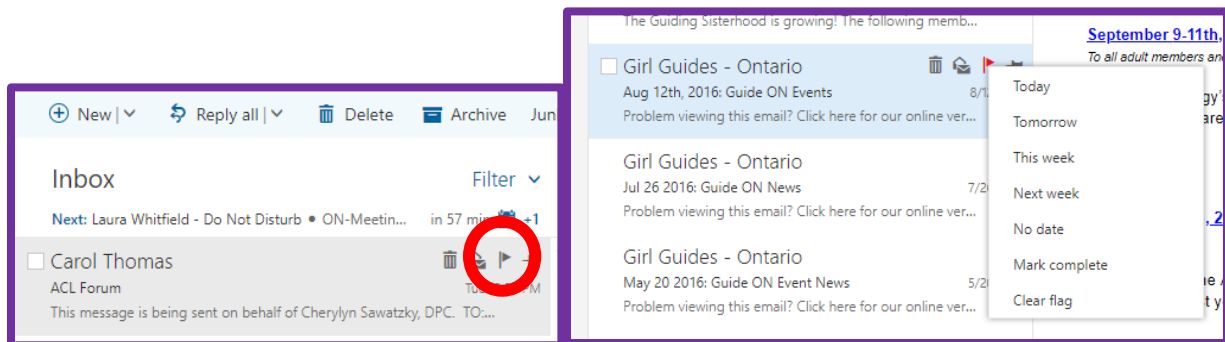
Categories (Online Only)

- Can be used to identify pending items, or items under a similar topic/theme
- Not available in the app

The image shows the Outlook interface with the 'Categories' dropdown menu open. The menu lists several categories with corresponding color swatches: 'ACL forum' (dark blue), 'Action Required' (red), 'Follow up' (yellow), 'Pending - ACL' (orange), 'Pending - Manager' (green), 'Pending - UA' (purple), 'Pending Response' (grey), and 'User Space/Permits' (dark green). Below the list are options for 'New category', 'Clear categories', and 'Manage categories...'. The background shows an email in the 'Inbox' with a filter applied.

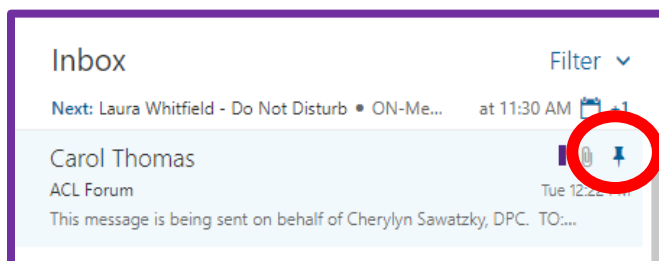
Flags

- Can be used to highlight important emails
- Can be used to highlight emails that require action
- Can be used to identify yourself emails that you need to follow up on
- Outlook Online: Hover over email to show the flag option – click to turn on. Right click to set follow up time. Click flag icon again to mark as completed (good if there are co-ACLs)
 - Can change the follow up timing (default is 1 day) – helpful when you need to action something on a specific day
- Outlook App: press an hold on an email until it is selected – click on the flag in bottom left of screen to apply flag



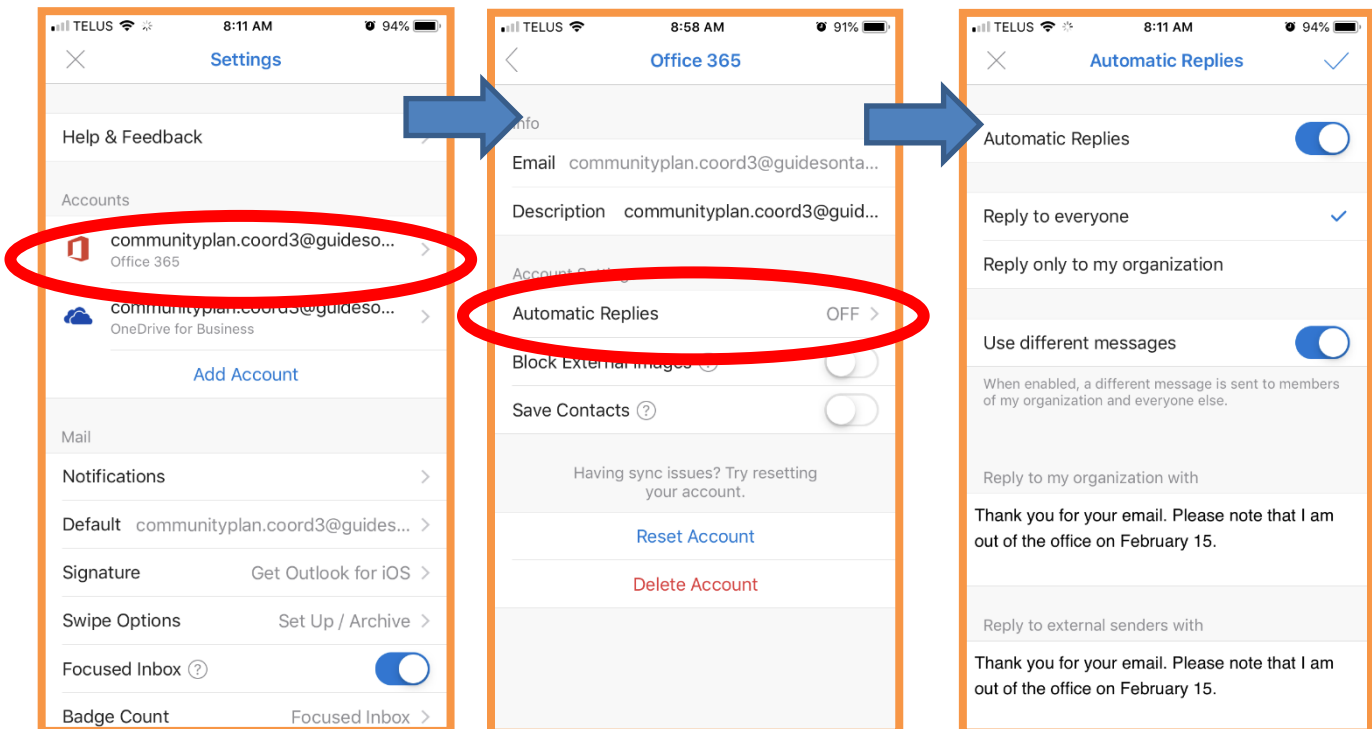
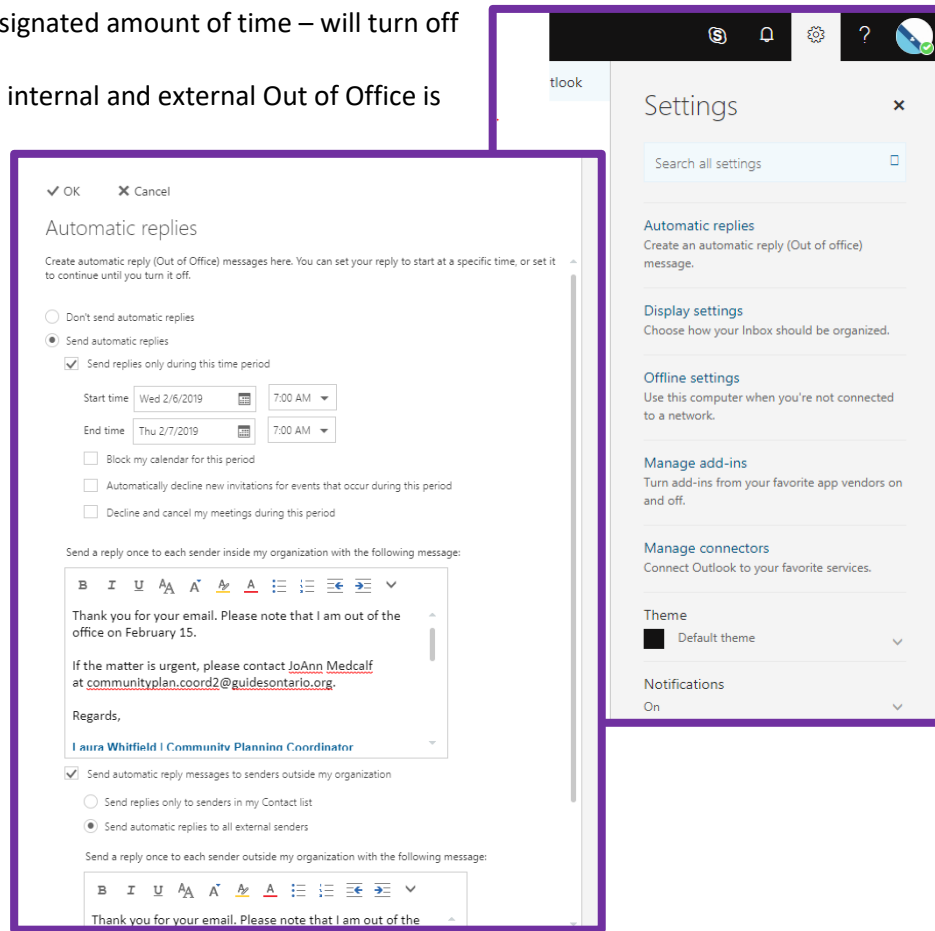
Pinning Emails (Online Only)

- In Outlook Online – hover over an email and click on the small pin on the right.
- This will bring an email to the top of your inbox – regardless of your sorting settings
- Beneficial if you refer to an email frequently (process change, OneNote Binder Link)
- If email is moved into a folder – it will remained “pinned” in the folder



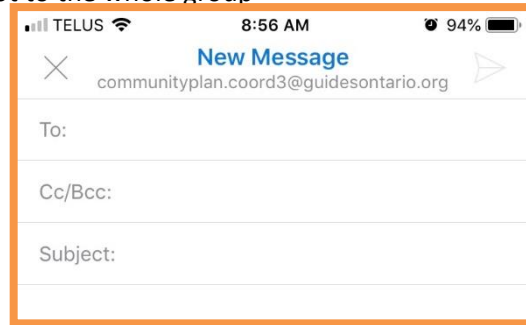
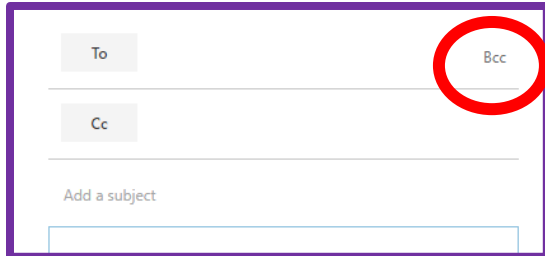
Setting an Out of Office

- Can set for a designated amount of time – will turn off automatically
- Make sure both internal and external Out of Office is set up



Tips and Tricks: Using Blind Carbon Copy (Bcc)

- If emailing a large group, BCC the emails
- Add a note to indicate who the recipients of the email are ie. "To all Community Guiders in Community 21"
- Personal emails are protected
- Saves you from the dreaded "Reply All"
- Helpful if you want everyone to receive the same messaging, but it is not a group conversation.
 - Replies will come directly to you – not to the whole group



Tips and tricks – sending email to yourself

- After a phone call or meeting – it is important to make record of the conversation
- This can be done by emailing yourself details of the interaction (day, time, location, individual, etc)
- Allows future ACLs to have history on past conversations and actions by searching the inbox
 - Paper trail – include as many details as possible.

OneDrive for file storage

- Can be used to store relevant documents, reports, files on the ACL account
- Files can be uploaded from computer onto OneDrive
- Files can also be "edited" online using Word or Excel

