Outlook and OneDrive Tips

Presented Sept. 4, 2024 by Walker MacBeath

Core Tasks in Outlook

https://support.microsoft.com/en-us/office/outlook-training-8a5b816d-9052-4190-a5eb-494512343cca

Using Task lists

https://www.microsoft.com/en-us/microsoft-365-life-hacks/organization/outlook-taskmanagement-features

Other hints and tips

Signatures should be set up using the standard provided by communications.

Signatures are not just for signatures. You can use them as templates for emails you send frequently. Just remember to add your actual signature at the bottom of the template.

Outlook desktop application versus online version – You need to set up your signatures separately for the desktop and online.

You can recall an email message sent internally by going to the email in your sent items and using the recall button. You can attempt to recall one sent externally but it will just be an email message sent indicating that you want to recall the message.

Using subfolders of your inbox folder is one way to organize your correspondence. Remember any retention policies set by the City will still apply to emails in folders.

You can easily convert an email to a calendar appointment using the "Meeting" button. Remember to delete out addresses in the "To" unless you intend to invite them.

When creating a meeting, using the scheduling assistant tab will allow you to see the schedule of those are you are inviting and to search for a room's availability.

When working with contacts, do not save critical information in notes. It is a known bug that this information is sometimes lost.

If there is information about a contact that you want to capture, you can check the add fields function to see if a specific field exists.

Sync Symbols

Blue cloud icon

A blue cloud icon next to your OneDrive files or folders indicates that the file is only available online. Online-only files don't take up space on your computer.

You can't open online-only files when your device isn't connected to the Internet. Learn more about OneDrive Files On-Demand

Green tick icon

OneDrive locally available file

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When you open an online-only file, it downloads to your device and becomes a locally available file. You can open a locally available file anytime, even without Internet access.

If you need more space, you can change the file back to online only. Just right-click the file and select "Free up space."

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Solid green circle with the white check mark

OneDrive always available file icon

Files that you mark as "Always keep on this device" have the green circle with the white check mark.

These always available files download to your device and take up space, but they're always there for you even when you're offline.