Tips and tricks
for becoming an Outlook power user

One of the best tools available to help lawyers better manage their practices and prevent claims is practice management software. Although not the ultimate in practice management programs, Microsoft Outlook also serves this purpose. Many lawyers use Outlook for e-mail, calendaring, contact management, to do's, and for tracking miscellaneous information. This article describes some configuration changes and work-arounds you can use to make Outlook a more practical practice management tool.

General tips

These five general tips will help you move around and work with items more quickly within Outlook:

1. **Learn keyboard shortcuts** for completing the more common tasks. The essential Outlook keyboard shortcuts include:

   - Ctrl+Shift+M to create a new message
   - Ctrl+Enter to send a message
   - Ctrl+Shift+I to jump to the Inbox
   - Ctrl+Shift+B to jump to the address book
   - Ctrl+Shift+K to create a new task
   - Ctrl+Shift+N to create a new note

(If you are not familiar with the syntax for describing keyboard shortcuts, simply remember that a plus sign (+) between two keys means that you press the listed keys, almost simultaneously, moving from left to right. For example, a capital B would be described as Shift+B.)

2. **Use plain English dates:** Outlook understands plain English entries in date fields, and will enter the next occurrence of the described date. For example: typing "tomorrow" will enter tomorrow's date, "nov 4" will enter the next occurrence of this date, "one week" will enter the date one week from today, and "2 days" will enter a date two days from the current date.

3. **Drag and drop items of one type to create another** – and save time. For example, dragging an e-mail message to the taskbar Calendar icon will open a new appointment. Dragging an e-mail to the Contacts icon will create a new contact. Information from the original item will automatically be transferred to the new item so you do not have to retype it.

4. **Use a "right click" for format and configuration settings.** In Outlook many options or features available with a simple right mouse click, including formatting and configuration settings. These options and features are "context sensitive" – in other words, you will be presented with a list of choices that are relevant to the item, field or text you are right clicking on.

   For example, right clicking on an e-mail in your Inbox presents you with Open, Print, Reply, Reply all, Forward etc. Right clicking on a blank spot on your calendar will let you create new appointments, and configure the calendar. You can right click on almost everything - try it!

5. **Sort items to quickly find the information** you want. In all views you can sort items listed in a column with a click on column title bars. Clicking a column heading a second time will reverse the order. This sort feature works the same on column style information in all Microsoft Office applications.

Coping with e-mail

These Outlook-specific tips will help you better manage the e-mail tide:

- To avoid having to type out or copy long e-mail addresses, enter contact information in your Address book, and configure Outlook so that it automatically looks-up e-mail addresses. Outlook will search your Address book and fill them in automatically when it recognizes a complete name.

- Put full names in your Address book, not just a generic e-mail address. Using generic addresses such as "fred123@aol.com" increases the likelihood that you will unintentionally send something to the wrong person.

- Be extra cautious before you hit Send. Make it a habit to double-check that the e-mail is addressed to the correct person.

- To help you keep your Inbox to a manageable size, use the Rules feature to

automatically forward, move to another folder, or delete incoming messages, especially those from e-mail lists. Click on Tools, then Rules Wizard to create a new Rule.

- To more effectively manage messages that you regularly send to large groups of people (such as client newsletters), create Distribution Lists. They are collections of internal and/or external e-mail addresses within the Outlook address book that allow you to send a message to multiple people by using a single e-mail address. To create a Distribution List, go to your Contents folder, select File, then New, and Distribution List.
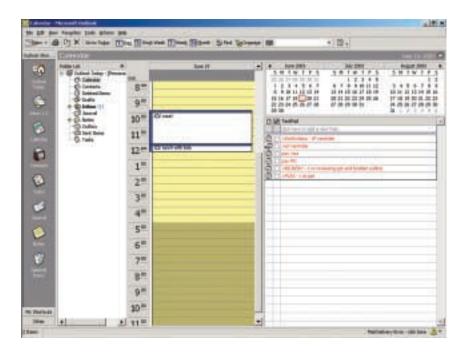
For even more e-mail related tips, see the *Surviving the E-mail Onslaught* article from our December 2002 LawPRO Magazine (www.lawpro.ca/LawPRO/surviving email.pdf).

Get organized with folders

Create folders to organize and separate items of the same type – for example, e-mail folders for individual clients with whom you exchange e-mails frequently, a generic folder for others, even individual archive folders for various e-mail lists to which you subscribe. For quick access to your most frequently used folders, create a link to them on the shortcut bar. To do this drag a folder from the Folder list and drop it on the shortcut bar. Select View, then Folder List to see your folders. Use different folders as your "files", rather than printing items and storing them in separate physical client files.

Working remotely

If you are using a laptop, you can configure Outlook to keep a full duplicate copy of all your data on its hard drive. This will allow you to work outside the office, reviewing e-mails, setting dates etc. Any additions or changes you make while at court or elsewhere will be updated in the main database when you next synchronize. You can also set Outlook up to allow you to send or receive e-mail remotely. The time is takes to set this up is well worth your ability to have full e-mail access while away from the office.

Leverage the power of outlook with a PDA

For those who don't want or need a laptop, taking all your key contact and calendar information on the road with you is easy with a Personal Data Assistant (PDA). Most PDAs include software that will transfer all of your key information from Outlook to a PDA. Although you can spend and do more on a fancy wireless PDA, a basic $150 model will suffice for basic calendaring and contact management. With Outlook and a PDA, you can eliminate the need to keep any paper-based diaries.

Calendar View

Using the Calendar in day/week/month view shows you both your calendar and a task list on one screen. In this view (shown above) you can edit or change either Tasks or appointments. To do more in calendar view try these ideas:

- At the beginning of each day, print out of your calendar in Daily Style. This gives you a one-page hard copy of that day's appointments and tasks, and a handy central place to make miscellaneous notes as the day progresses. Review it at the end of the day to make sure you complete all necessary tasks.

- To see the entire day without scrolling, make the default appointment length 1 hour (right click on the time column, and pick 60 minutes).

- Share your Calendar with your assistant so he/she can add or edit appointments in it. This will eliminate the need to keep and synchronize a traditional paper-based date book.

- To gain some extra space on your desktop, make the Outlook Shortcuts bar narrower once you learn what the various buttons are. To do this, drag and drop the double-headed arrow when over right side border of the of Short Cuts bar. Leave just left part of the button labels visible so you can see enough of the label to differentiate similar types of folders.

- To gain even more space, turn the Folders list off. To view it again, click on Folders toolbar button.

- Use the group scheduling feature which uses shared calendar info to display free/busy times for everyone that has their data in Outlook. This is great when you have to schedule meetings.

- For things that repeat, create recurring appointments, events, or tasks. Do this at the time you create the item. Click on the Recurrence button to access the dialog box that has the parameters for setting the timing of recurring items. Note that you can edit individual instances of recurring items if you need to.

Managing matters by taking tasks to Task

You can use Outlook Tasks to help manage your files and make sure you complete all necessary tasks by required deadlines. Keeping in mind that only today's and overdue Tasks appear by default in Calendar view, you can do the following to systematically track your client matters:

- Create one main task for every matter, and indicate in point form in the subject area what is to be done, what you are waiting for, what dates are coming up etc. You can also create other separate Tasks for other matter related tasks or deadlines.

- Start the subject in all work related Tasks with a ">", followed by the client name in capitals. This makes individual client matters easy to spot. Create personal items without the ">", and they will appear at the bottom of the task list.

- In Calendar set your Tasks to be sorted alphabetically by subject (right click on the column heading, and chose this sort type).

- As you complete the current work on any particular matter, edit its subject to add a description of what is to be done next, and enter a due date on the appropriate future date when the next step on the matter must be done. Doing this will make you trip over each matter at the appropriate time. As well, a quick review of the subject of any Task lets you know the exact status of every client matter.

- Set alarms on Tasks when you want to be reminded of a limitation period or other important deadline. These alarms will pop-up reminder windows on the time and/or date specified.

Limitation periods

To keep track of limitation periods in Outlook, create events on the set dates and set alarms on those events that warn you – via a popup window – of upcoming limitation period deadlines days, weeks or months ahead. You can also run a separate card system as a backup.

Virtual sticky notes

The Outlook Notes folder contains individual "Notes" items, which are the electronic equivalent of a paper scratch pad or sticky notes. You can add text to these Notes by any of the conventional means. Use them to jot down questions, ideas or for any text or information that you may want to access in the future.

Make Outlook work the way you do

To get the most out of Outlook, you have to tweak features and change settings to match your own needs and preferences. To make some changes to Outlook's configuration, select the Tools menu bar item, then Options. The Options dialog box contains dozens of configuration settings that may make Outlook work better for you.

Training is key

Outlook is a complex program, and the interface is not terribly intuitive at times. To get the most out of Outlook, you must spend some time formally educating the people who will be using it.

If you like self-paced learning, check Keystone Learning Systems (www.keystonelearning.com). A set of Basic, Intermediate and Advanced tapes for Outlook 2000 costs US$160.

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