



MICROSOFT OUTLOOK for LEGAL PROFESSIONALS

Covering Outlook for Windows Versions
2010, 2013, 2016, 2019 and Office 365



MICROSOFT OUTLOOK

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

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Mac users: If you are using this manual with Outlook for Mac, some of the steps will be different. Further, some features available in Outlook for Windows are not available in Outlook for Mac.

The materials in this book were written using Microsoft Office 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Office 365, your software experience may vary slightly from what is seen in this manual.

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MEET OUR TEAM OF OUTLOOK EXPERTS

Meet our team of Outlook experts who have co-authored this manual.



BARRON HENLEY

Barron is an attorney who has over 20 years of experience in legal technology. After earning his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University, Barron discovered his passion for helping lawyers fix problems within their practice. Today, Barron partners with our clients to make law firms and legal departments more efficient. Barron's breadth of knowledge enables him to dive into the details of a firm's operations. He is often the lead on Comprehensive Practice Analysis projects for clients that examine all aspects of making a firm more successful: technology, organizational design, process optimization and financial practices.

PAUL UNGER

Paul teaches and coaches lawyers how to be more efficient with time, task, document & email management, and just as important, distraction management by offering customized time management workshops for lawyers and their staff. Paul is also a national speaker and frequent lecturer for CLE programs. He is the author of PowerPoint in One Hour for Lawyers published by the Law Practice Division of the ABA and Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management.



JOHN FEDERICO

John's specialty is "making technology do cool things it wasn't necessarily intended to do." Having practiced as an attorney, John understands the rigors of practicing law, but he also empathizes with the demands placed on a legal professional's time. With this in mind, he saves time for his clients by leveraging document automation technologies like HotDocs and Microsoft Word, to drastically accelerate the drafting, reviewing, and editing of legal documents.

JEFFREY SCHOENBERGER

Jeff is our resident Apple guru. After practicing law as an Equal Justice Works / AmeriCorps Legal Fellow for the Legal Aid Society of Southwest Ohio, Jeff joined Affinity, and brought his unique ability to discover faster and better ways for clients to do everyday tasks to our team. Because Jeff understands the worlds of both PC and Mac users, clients using any type of system can count on him to help with desktop office software and document assembly needs regardless, of the type of computer an office has. Jeff is also well versed in Apple's iOS, so he can aid clients in making the most of their tablets and mobile devices.



MEET OUR TEAM OF OUTLOOK EXPERTS CONT.



DANIELLE DAVISROE

After working as an attorney in domestic relations for several years, Danielle found her way to Affinity and to this day she is always on the lookout for better ways to do things. She carries new strategies she finds with her as she works with the clients her team supports. Danielle has a Bachelor of Science in Business Administration from The Ohio State University Fisher College of Business and a Juris Doctorate from The Ohio State University Moritz College of Law.

ADAM RINGEL

With four years' experience as a personal injury attorney, Adam is a valuable member of our document automation team. In addition to his skill in helping make legal drafting more efficient through technologies like HotDocs and Microsoft Word, Adam provides training on the Microsoft Office Suite and builds custom data queries for our clients. With the highly collaborative nature of the document automation team based in Columbus, Adam is constantly invigorated by his colleagues. The group consistently helps one another find new insights and perspectives along the path of finding the solutions our clients need.



CYARA HOTOPP

After graduating cum laude with a Bachelor of Arts in Philosophy from The Ohio State University and a Juris Doctorate from The Ohio State University Moritz College of Law, Cyara knew she wanted to use her education to solve problems for legal professionals. She is also currently working on getting an MS in Information Assurance. Cyara works with law firms and legal departments to help streamline the drafting of complex documents. Her technological understanding coupled with her background in law means she doesn't just make a document work properly, but she also advises on truly improving the document from a best practices perspective.

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5 OTHER OUTLOOK TIPS AND TRICKS:

OUTLOOK 2013/16/19/365 QUICK REFERENCE SHEET

See Exhibit A on page 37 below.

CREATE CONTACTS FROM EMAIL

Drag and drop an email to the Contacts button and Outlook will create a new contact card for that email sender.

RIGHT-CLICK EMAIL FOR ALL POSSIBLE OPTIONS

Also known as alternate clicking, this feature will present very handy functions such as Open, Reply, Print, Forward, etc.

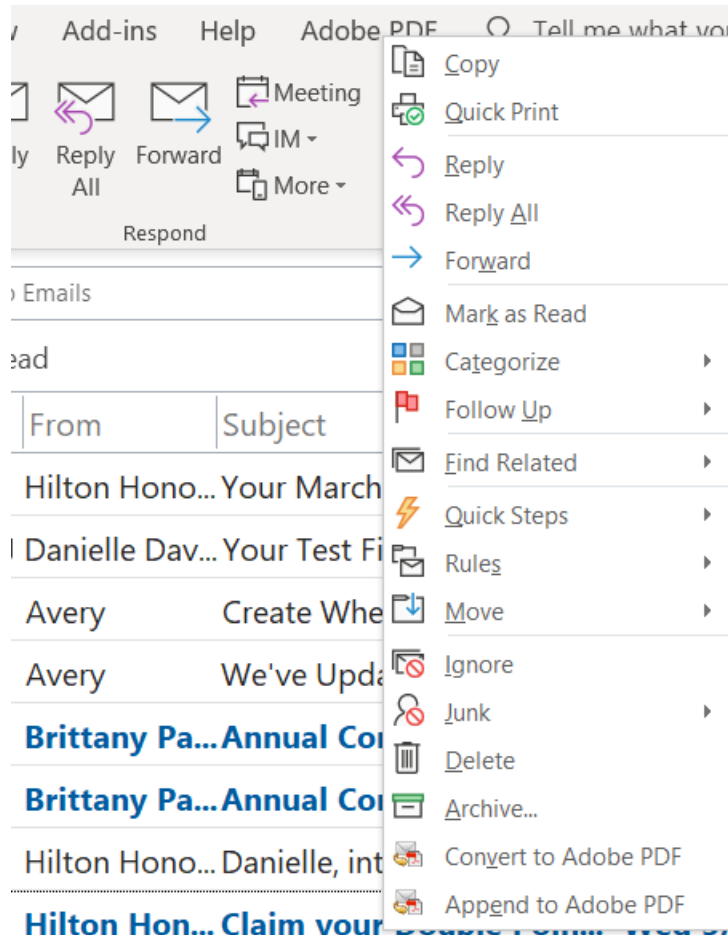


FIGURE 5-1

RULES CREATING FLAGS AND ALERTS

You can manage multiple email accounts or large numbers of emails from an important client by setting up a Rule that tags the email with a colored flag/alert or plays a special sound upon arrival. This will enable you to quickly view and group emails from a particular source.

AUTOMATIC REPLIES

If you're going to be out of the office, this is a way to automatically notify people who send you email. However, if you're receiving email from a listserv, this may be a problem because every time someone sends a post to the listserv, everyone on the listserv is going to get your out of office message. In any event, to turn on this feature in **File menu → Info (left side) → Automatic Replies button**.

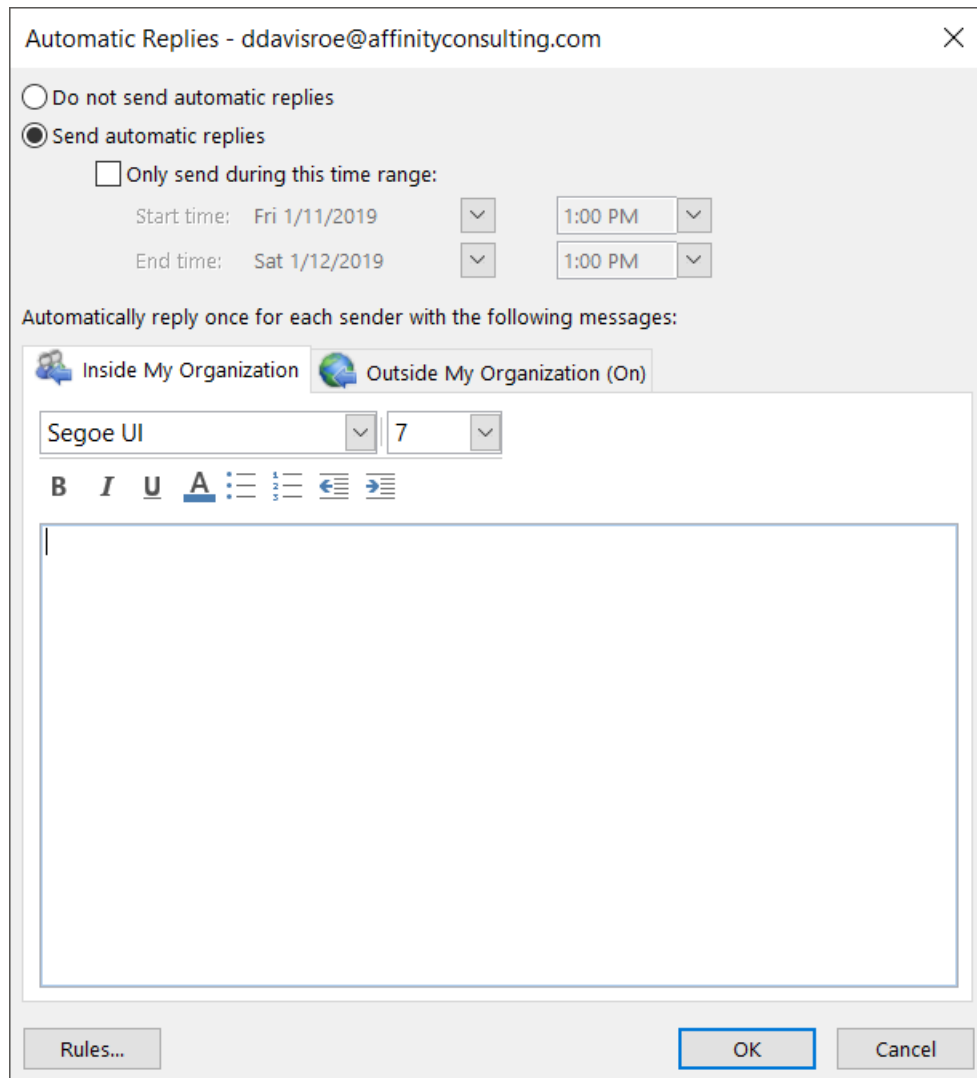


FIGURE 5-2

LEARN TO USE CATEGORIES

This feature allows you to color code or tag an appointment, email, contact, or task with a named category which has a color assigned to it. I find these to be particularly useful with appointments and email. Assigning a category

to an appointment turns the entire appointment the color of the category. You can also sort by category which can be useful with email.

Let's say you want to create a category called Billed which you will assign to each appointment on your calendar AFTER it is billed. Just follow these steps:

1. Right-click an appointment you have billed.
2. Choose Categorize ➔ All Categories.

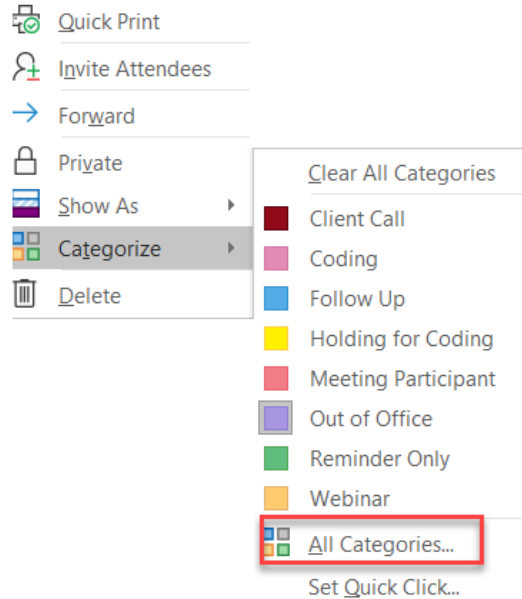


FIGURE 5-3

3. Click the **New...** button and create a category as follows:

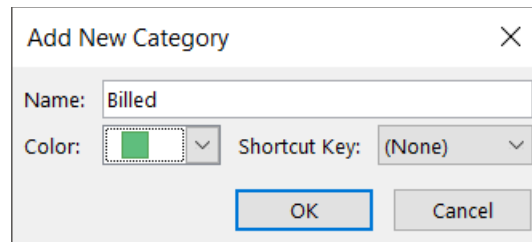


FIGURE 5-4

4. Click **OK** ➔ **OK**.

VIEW NON-CONTIGUOUS DAYS ON YOUR CALENDAR SIDE BY SIDE

A business associate wants to schedule a lunch on a Thursday in October. You want to see your Thursdays side-by-side. Here's what you do:

1. Go to your Outlook calendar and click on the DAY button.
2. Left-click on the first Thursday in October.
3. Now hold down on the Ctrl key and left click the rest of the Thursdays in October. You'll see all of them side-by-side and can easily determine which would work best for you.



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