Affinity
CONSULTING

MICROSOFT OUTLOOK for LEGAL PROFESSIONALS

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

MICROSOFT OUTLOOK

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

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.

For training or technology assistance, contact us at Affinity Consulting Group LLC - 614.602.5561 or info@affinityconsulting.com. For permission to use materials from this text or product, submit all requests via email to info@affinityconsulting.com.

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.

MICROSOFT OUTLOOK FOR LEGAL PROFESSIONALS
TABLE OF CONTENTS

1 THE PROBLEM

2 EMAIL STORAGE

3 DEALING WITH THE OVERLOAD

4 OUTLOOK INTERFACE IMPROVEMENTS

5 RECOMMENDED SETTING CHANGES

6 OTHER OUTLOOK TIPS AND TRICKS:

7 OUTLOOK 2013/16/19/365 QUICK REFERENCE GUIDE

6 OTHER OUTLOOK TIPS AND TRICKS:

OUTLOOK 2013/16/19/365 QUICK REFERENCE SHEET

See Chapter 7 on page 42 below.

CONVERT ONE TYPE OF ITEM TO ANOTHER

For example, you can create a contact from an email by dragging the email onto the Contacts button. You can drag emails or tasks to the calendar button to make appointments. If you drag emails onto buttons, it will leave the email where it was.

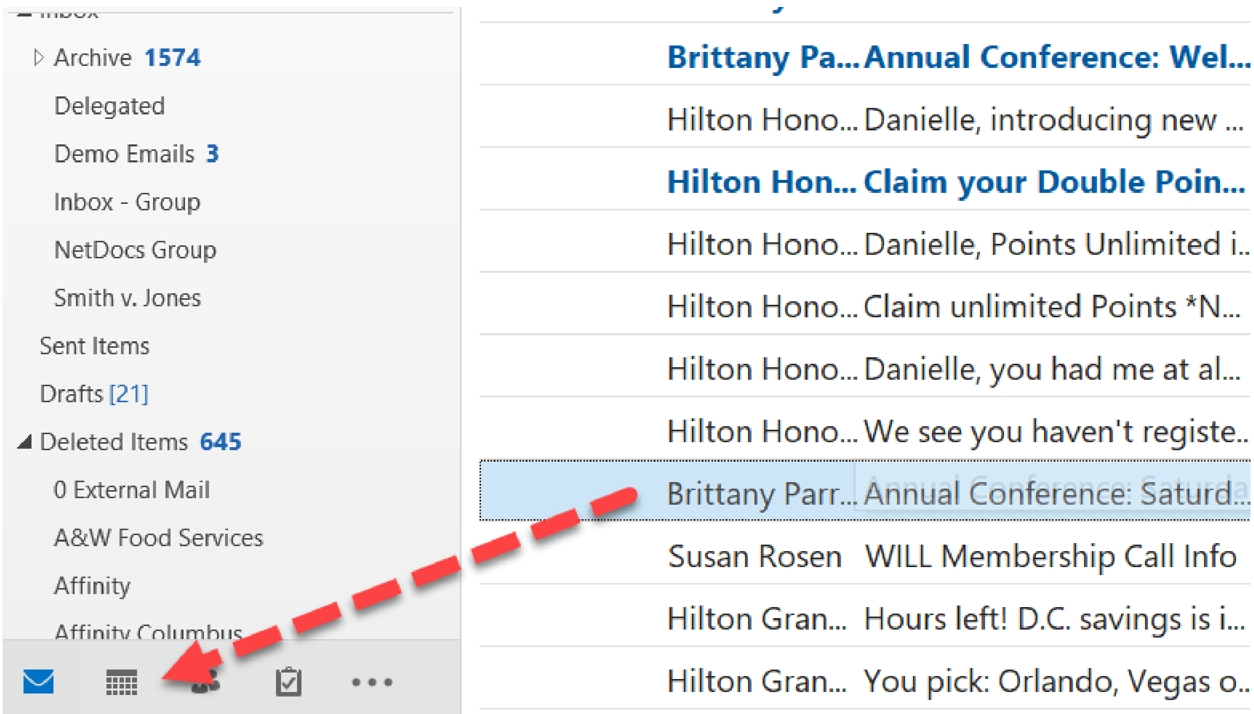

FIGURE 6-1

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.

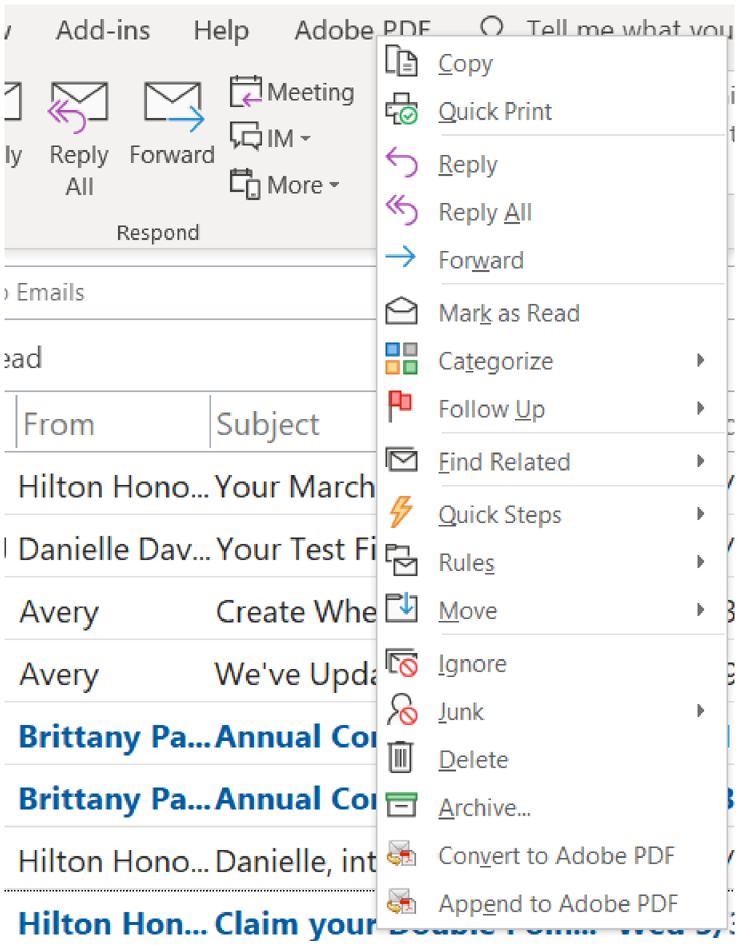

FIGURE 6-2

EMAIL TEMPLATES

You use email templates (Outlook 2019 and Office 365 version) to avoid having to re-write frequent emails. Some good use-cases include: new matter request forms, sending instructions to a client, directions to your office, etc. They aren't super sophisticated, but they are very easy create and helpful! You create and apply email templates by doing the following.

1. Create a blank new email.

2. Select **View Templates** from the **Message** ribbon.

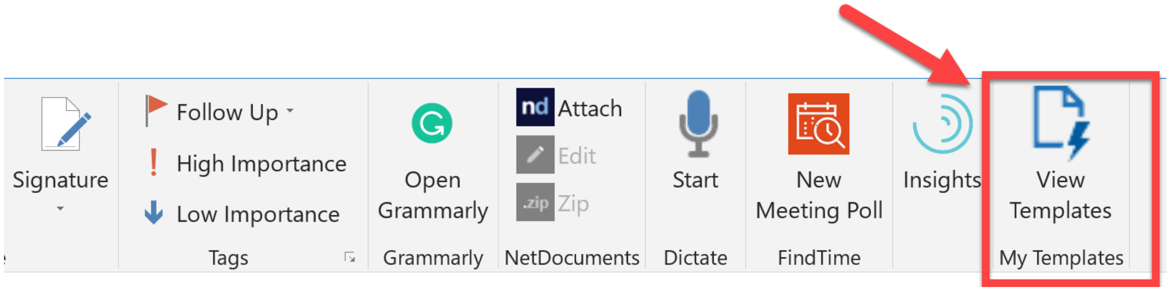

FIGURE 6-3

3. Scroll to the bottom and select **Add Template.**

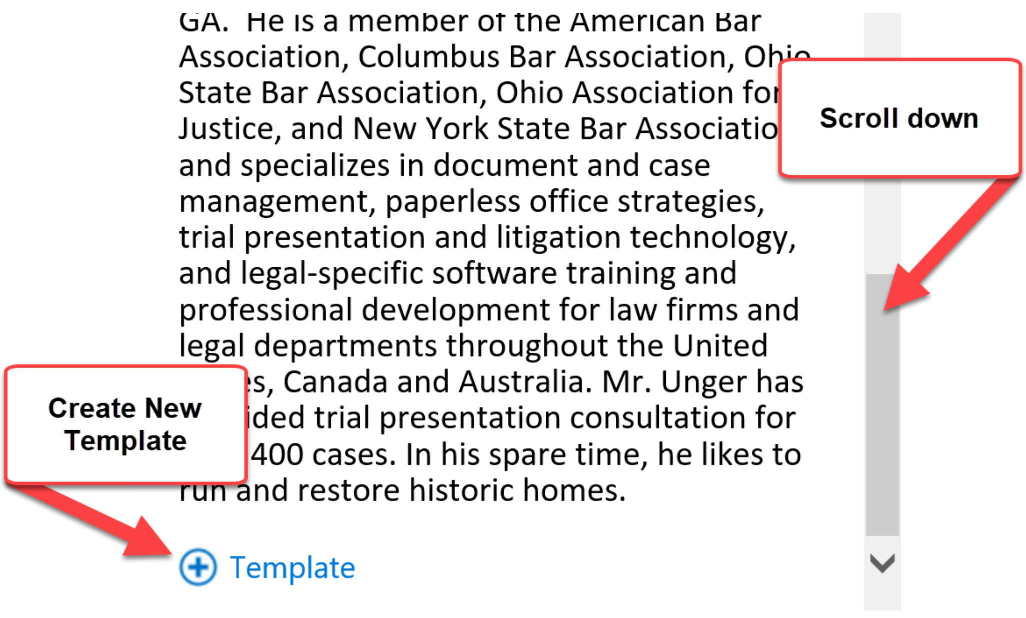

FIGURE 6-4

4. Name the template in the first field and paste your desired text in the second field and hit **Save**.
5. To use/apply your email template, open a new email, select the **View Templates** button, and simply left-click on the desired template.

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**.

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TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

At Affinity, we believe that training should be woven into the fabric of a firm’s culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm’s full potential requires an ongoing investment in training.

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