

# Outlook Tools (Windows)



A Quick Start Guide by MET IT

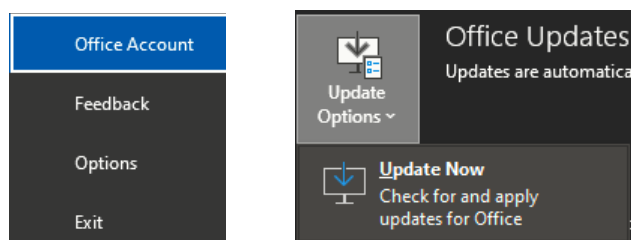
Archiving E-mails • Rules & Quick Steps • Accessing SharePoint Calendar • FindTime Add-in

## Archiving E-mails (Archive Folder)

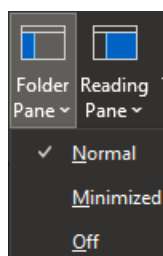
Each Microsoft 365 account comes with a cloud-based Archive folder that can be used to store important e-mails for future use.

Although the folder should be available by default, if you do not see the folder, you can do the following:

1. Go to **File > Office Account > Update Options > Update Now**.



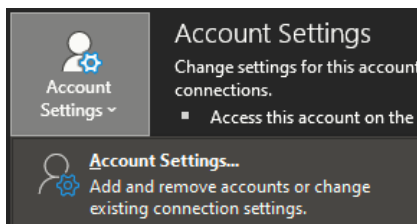
2. Go to **View > Folder Pane > Normal** to see all standard e-mail folders.



## Archiving E-mails (Local Archive)

Users can also create a local archive file by following these steps:

1. Go to **File > Info > Account Settings > Account Settings...**



2. Go to **Data Files > Add...** and pick a name and location for the new file.

**NOTE:** Please do not save your file into your OneDrive folders as this is known by Microsoft to cause syncing issues.

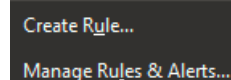
See our training portal for further guidance  
<https://www.bu.edu/metit/training-portal>

## Using Rules & Quick Steps

The Rules and Quick Steps features allow users to perform common e-mail tasks by either automating them entirely (Rules) or making a simple shortcut for them (Quick Steps).

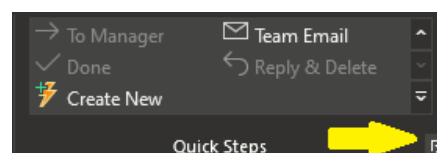
### Rules Instructions:

1. Go to **Home > Move Section > Rules**. You can then choose to:
  - a. Create a new Rule for the current selected e-mail.
  - b. Manage all existing rules and create new ones from scratch.
2. When creating a new rule (from a template or blank), you will be presented with three groups of options:
  - a. Conditions – What triggers the rule?
  - b. Actions – What should you do?
  - c. Exceptions – What avoids/breaks the rule?
3. You can now name your rule, run it immediately, and shift its priority among all your rules.



### Quick Steps Instructions:

1. Go to **Home > Quick Steps Section**.
2. Click on the “Manage Quick Steps” button in the lower right-hand corner of the Quick Steps Section.



3. Click on the “New” drop down and select the type of Quick Step you would like to create.

In general, use Rules for tasks that you do not want to do manually and use Quick Tasks for compound actions you perform regularly (e.g. – Reply & Delete).

Contact MET IT for helpdesk support  
 metit@bu.edu • 617-358-5401

# Outlook Basics (Windows)



A Quick Start Guide by MET IT

Archiving E-mails • Rules & Quick Steps • Accessing SharePoint Calendar • FindTime Add-in

## SharePoint Group Calendar

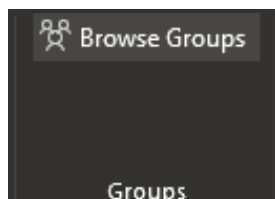
Each departmental SharePoint site comes along with a shared Calendar that can be accessed in Outlook. This Calendar is not listed as part of the BU Address Book but functions in a similar way once added to Outlook.

To add the SharePoint Group Calendar to your Outlook:

1. Go to your Calendar View in Outlook.



2. Go to **Home > Group Section > Browse Groups**.



3. Using the search field in the pop-up window, search for your SharePoint group.

4. Once you have located your SharePoint group in the resulting list, click "Join" on the right-hand side of the pop-up window.



5. After joining, go into your list of Calendars and scroll down to the "All Group Calendars". You should see your group's calendar and can select it/edit it as needed.



## FindTime Add-in

The FindTime Add-On adds a helpful utility to your e-mails that polls recipients about the best time to meet.

### FindTime Add-in Installation:

1. Go to **Home > Add-ins Section > Get Add-ins**.

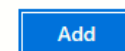


2. In the Search Bar enter "FindTime". Click on the result and select "Add".



FindTime  
Microsoft Corporation

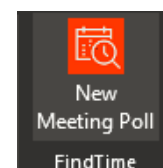
By clicking on add,



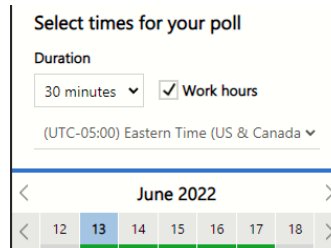
### FindTime Add-in Use:

1. Open a new blank e-mail.
2. Add all recipients you wish to attend the meeting in the To & Cc sections.

3. Go to **Message > FindTime Section > New Meeting Poll**.



4. In the new side bar, select the length of the meeting and the days/times you would like to offer.



5. Click next, adjust poll settings, and review your selections. Click "Add to Email" to add the poll to the body of the e-mail.

