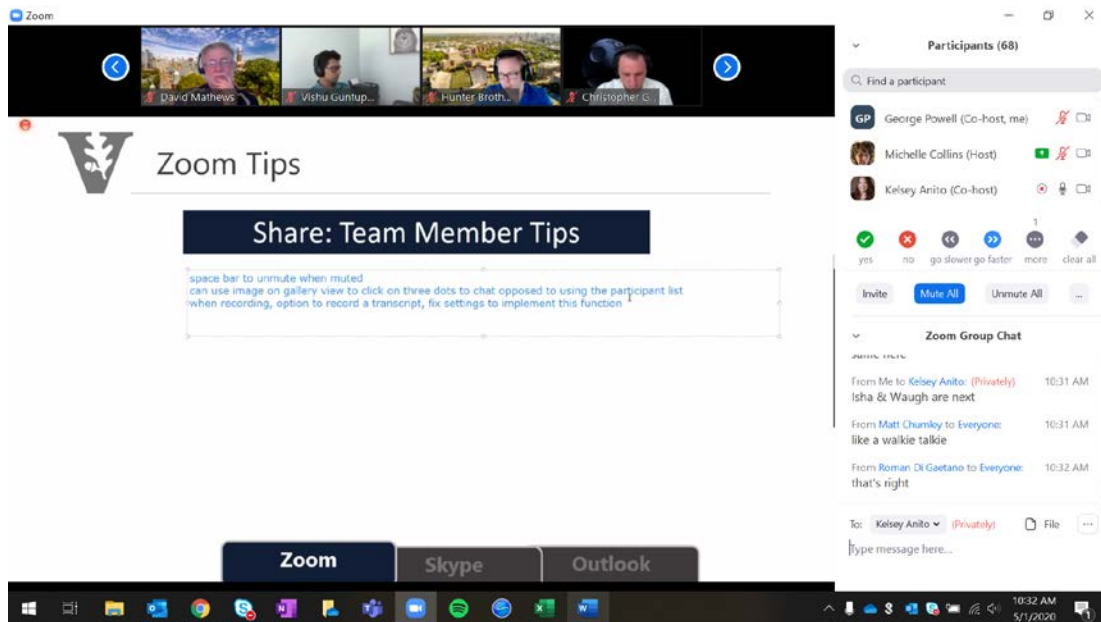


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Tools: Tips, Tricks, and Etiquette

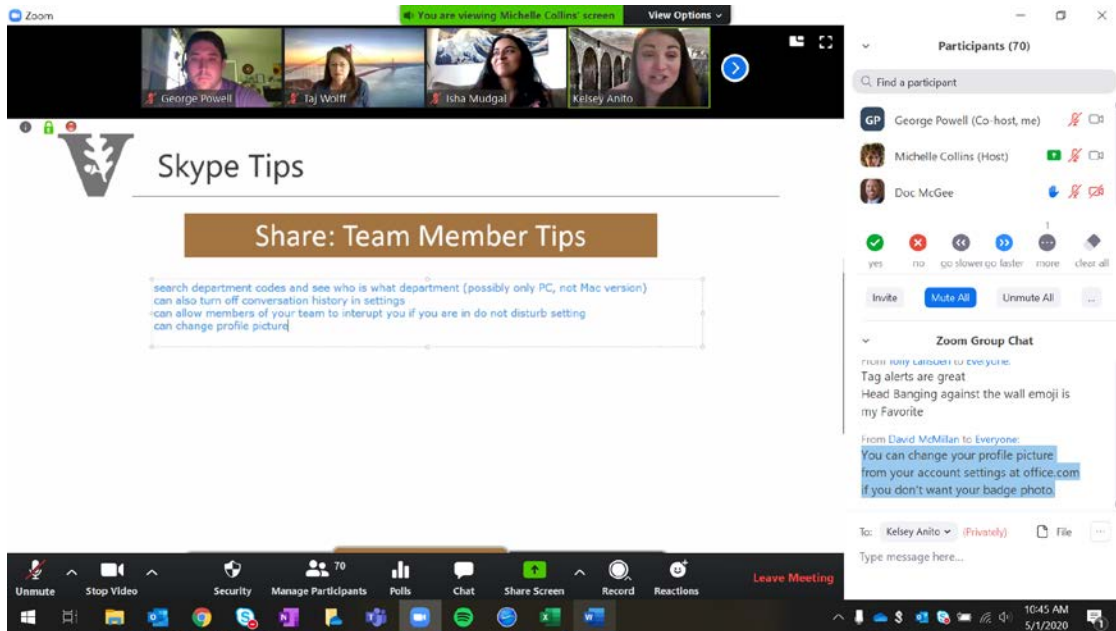


- Use the lobby setting to pause when people can enter a meeting you have scheduled
- If you are a host of a meeting, you can assign a co-host from the 'manage participants' tab
- You can get a list of the people who attended your meeting by exporting in CSV (Click on report Find the meeting in the list and click on the number under participants. That will open a window with the list and you can click export)
- To have your skype status reflect your zoom meetings, use this plugin:
<https://support.zoom.us/hc/en-us/articles/204481169-Zoom-Skype-for-Business-Lync-Plugin>
- When on mute, holding the space bar will temporarily unmute you
- Private messages, to someone in the same meeting, will be seen by the host if they are exported
- Slack users can also add a zoom plugin and outlook plugin to make it easier to join meetings

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- If a participant wants to record the meeting, a request is sent the host for approval
- If presenting, try to look at the camera and not focus on the people so that it will come across as a face to face conversation
- Keep mic muted during calls, unless you are talking, to help with feedback issues
- If you cannot do a virtual background, any colored 'screen' will allow you to if you set it up behind you.
- If you experience network issues, you can join the audio and meeting separately.
- HD is not enabled by default, but can be turned on in video settings
- The host can disable and enable annotations, as well as assign annotations to show the name of the annotator.
- The Host and Co-host cannot participate in the zoom polls
- Try turning off your video if your audio is not working
- You can change your name in the video window by hovering over and selecting 'change name'
- Hosts can disable the ability of participants to change their name
- 615-343-9999: the Tech Hub folks can help teach you how to use Zoom, too

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- You can set alerts to let you know when someone comes available
- Search by department code
- Change your profile picture from your account settings at office.com
- Conversation history is not available if using the Mac client
- If you are on a call on your computer, you can transfer the call to your mobile if necessary
- You can share only certain applications if you do not want to share your entire screen
- Files can be saved from previous conversations – they remain in your documents in a specific folder titled 'received files'
- You can set skype to call your cell phone anytime someone calls your work number
- If you bring someone in mid-way through a chat, they will only see the conversation from the time they joined

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- Teams/Skype both reference the outlook calendar
- If you manually change your status, don't forget to change it back
- If you need to invite another person to a Skype conversation, you can hit Ctrl R to see the members of the conversation, and you can then drag and drop people from your contact list into the participants list. (You can Ctrl Click to select multiple people and drag/drop them all at once as well)
- Adding a security group in lync instead of individuals and join your meeting directly from lync instead of the outlook client. Ctrl+S would force saving the conversation in the lync client

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A screenshot of a Zoom meeting. The main window shows a presentation titled "Outlook Email Tips" with a green header "Share: Team Member Tips" and a list of tips. The Zoom interface includes a top bar with participant thumbnails (Ankita Jadhav, ondreyes, Allen Karns, Isha Mudga), a bottom bar with Zoom, Skype, and Outlook buttons, and a right-hand sidebar with a "Participants (68)" list and a "Zoom Group Chat" window. The chat window shows a message from "Hunter Brothers to Everyone" with a highlighted portion: "if you set your rules in the web browser instead, they'll run all the time and will work on your mobile app instead of working when outlook is running on your desktop".

- Use OneDrive for attachments; you can set an email for scheduled follow up; explore mailbox rules capabilities... they are very powerful for sorting and controlling mailbox; Everyone has personal OneDrive space. It is a great space for controlling access to attachments, expiring access, and generally distributing large attachments which tend to fill user mailboxes.
- If you need to follow up on an email at a later day convert it to a calendar appointment. This way you won't forget and have all the information you need in the calendar appointment.
- set your rules in the web browser not in outlook; if you set your rules in the web browser instead, they'll run all the time and will work on your mobile app instead of working when outlook is running on your desktop
- The mailbox rules can also be used to cleanup your inbox using the desktop app because you can run the rules retroactively; Also, if you accidentally delete something from your deleted items mailbox, you can use the recover deleted items option by clicking the deleted items folder and looking at the toolbar.

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- If you use a generic title with no invite details, your participants will not be prepared.
- You can turn off invite forwarding in the calendar invitation.
- Be sure to provide enough time for meeting participants to complete any actions items you are expecting them to bring to the meeting.
- Avoid acronyms for meeting locations
- If you put time reminders your calendar mark the event as "free" so it doesn't look like you are "busy" at that time
- Microsoft 'to-do' will create a to-do list automatically from items flagged in your inbox
- You can change 15 minutes default to another setting if you want. (File > Options > Calendar > Default reminder time)
- Drag and drop an email to the Calendar icon to quickly create a personal reminder
- Create a Outlook signature "Please Do Not Forward!" and select Insert from top tool bar then "signature" to auto add this to calendar meetings
- Use scheduling assistant feature to avoid double and triple booking your colleagues
- Take care to read RSVPs. Often times when folks accept or decline your meeting, they will pass along important information.
- If your attachment is hosted in OneDrive - you can see who read it ahead of your meeting.
- Leaving many unaccepted meeting invites in your mailbox, contributes to slow mailbox performance; the more of your schedule you load into your calendar, the more accurate/effective your weekly analytics report is
- If you block time and provide specifics about what you're working on it can help you track things like, hours spent on COVID-19 efforts
- From the Files tab, you can go to Settings -> Delegate Access to set up a delegate. That delegate can then manage a calendar that you've shared with them on your behalf. If someone has shared a calendar with you and asked you to manage it for them for whatever reason and you can't, chances are they have neglected to add you as a delegate.

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- Try to clean obsolete contacts from my Outlook Recipient Cache, helps prevent sending to wrong people accidentally.
- Email is a passive communication. Emails do get buried so if it is really important pick up the phone and call them. Assume emails may be passed along. Internal & External responses available for Out of Office messages
- Quick Parts - Great for replying with common answers. <https://www.ablebits.com/office-addins-blog/2019/04/03/outlook-quick-parts-autotext/#Outlook-quick-parts-intro>
- Learn to utilize email rules for better organization
- Clear your 'junk folder' every once and awhile
- Using the 'flagging' function can help with follow-up- you can see them all under 'tasks'
- Forwarding meetings can cause issues. If the organizer makes an update to a meeting, people who have received a forwarded meeting will not receive that update. Most of the time, I'd recommend asking the original organizer to add additional people rather than forwarding it.
- Use the 'signature' to create standard templates if you find yourself sending the same email multiple times a week
- You can set your settings to automatically 'BCC' yourself
- You can schedule delivery of your emails in advance
- In some email clients spell check doesn't work in the window where you create your OOO message. Copy it out into Word to make sure you've not misspelled anything
- If you use the full 10-digit number, it makes it a clickable/callable link if you are looking at the appointment on your cell phone. That makes it easier to call so you do not have to manually specify the area code in your dialer
- If you block time on your own calendar it shows your status as 'busy'. If you invite yourself, it shows you as 'in a meeting'
- When requesting the admin team to schedule a meeting on behalf of a leader you should include the Subject, Attendees, Optional Attendees, duration of the meeting, timeframe of when the meeting should occur and any documentation required for the meeting

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- Email is a great communication mechanism but after 7 emails back and forth, you might consider picking up the phone/zoom call
- If your inbox is flooded, create categories to separate emails and keep emails organized
- use kB shortcuts! Ctrl + R to reply, Ctrl + F for forward; ctrl+alt+f for reply all; ctrl+ e for search
- CMD + J to forward on the Mac
- choosing the calendar appointment and then clicking on OneNote would let you collect your notes related to that appointment which is great for following up.
- Quick steps can make your life easy - they are great for creating a template of an email that gets sent out such as work from home, or VUIT alerts
- For those who have rules and cannot find an email, you can search your mailbox with the option "received = today" this will automatically find all email received that day
- If you use @ and the person's name it will: highlight the person's name in the email, add them to the To line, and will indicate they were mentioned in their email and in Teams
- Use 'OOO' as opposed to 'busy' in skype status when you are out of the office
- Schedule travel time - even for Zoom meetings
- You can add SharePoint calendars in Outlook
- you can open a second outlook window to see your calendar and email, super helpful if you have multiple screens
- Meeting coordinator should give as much warning as possible for upcoming meetings
- For future PTO please be courteous and decline the meeting and explain why
- You can add your Google calendar and IOS calendar to Outlook to keep your calendars in the same spot but also keep your personal and work separate vs adding it all on one calendar that you might need to share
- Schedule your breaks/busy time
- Use Categories to indicate in what area of campus the meeting would be held