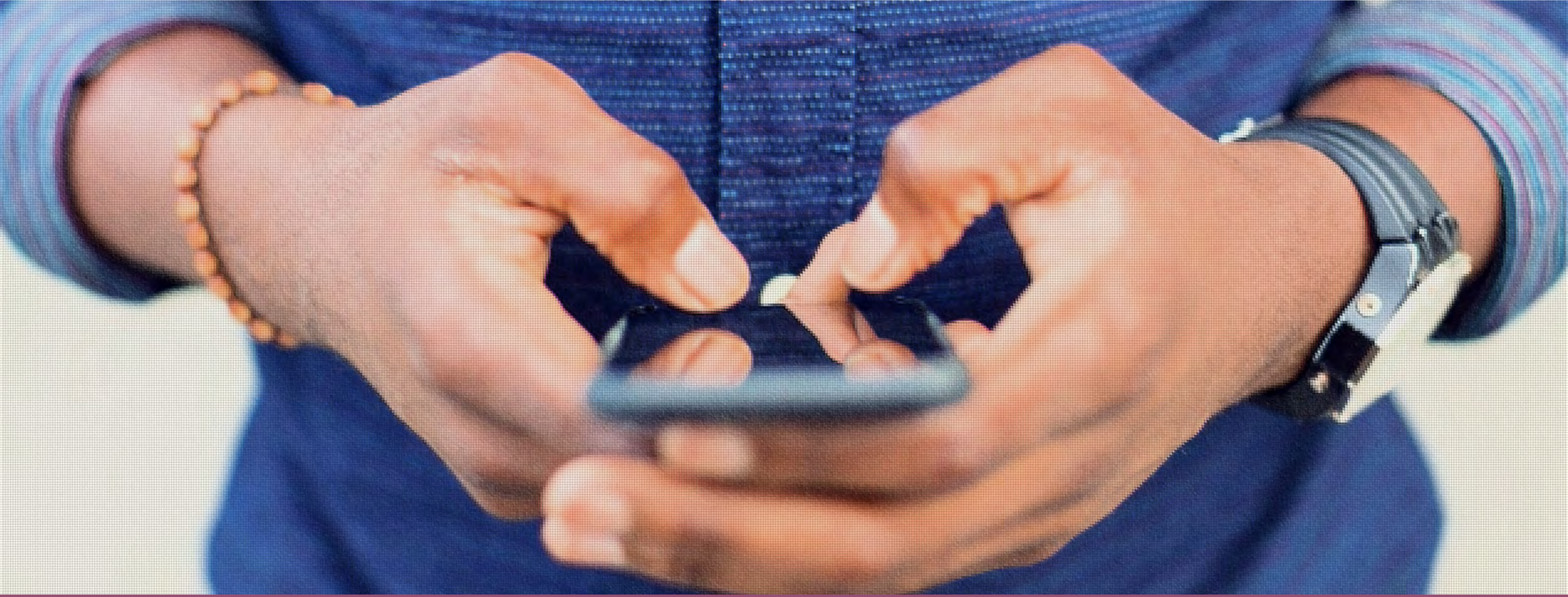


Tech Tips 101: Sanity Savers for Supervisors

Efficiencies in Outlook, Teams, and Mobile

Introduction

Amber Perez

Office Support Supervisor

Meeker County Social Services

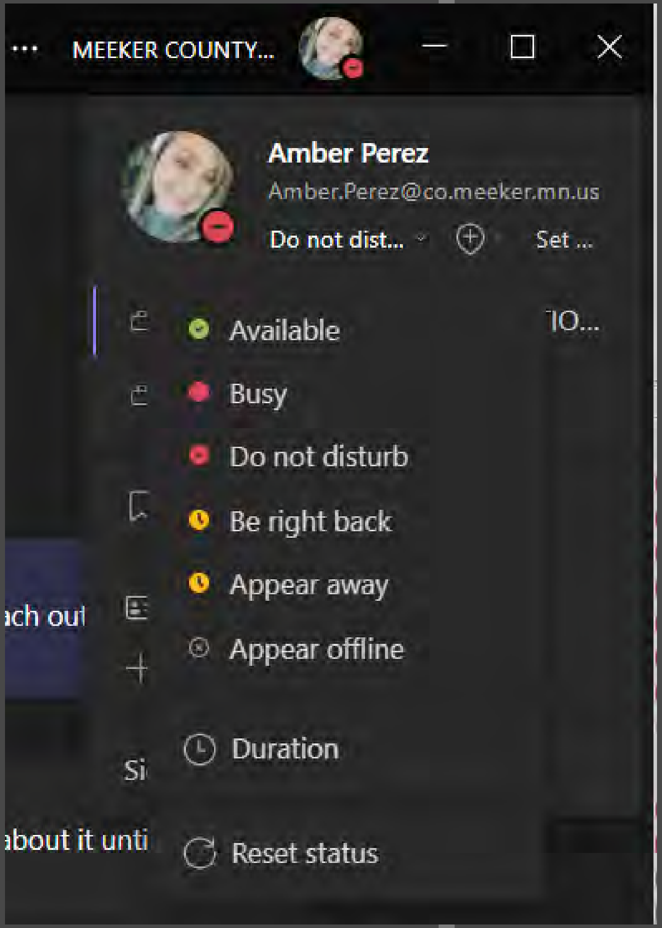
Amber.Perez@co.meeker.mn.us

320-296-0010

LinkedIn www.linkedin.com/in/amber-perez-71594112a

Give yourself permission to be a learner for the next hour

Get the most out of the time spent here


MEEKER COUNTY...
Do not dist...
Set ...
Available
Busy
Do not disturb
Be right back
Appear away
Appear offline
Duration
Reset status

Amber Perez

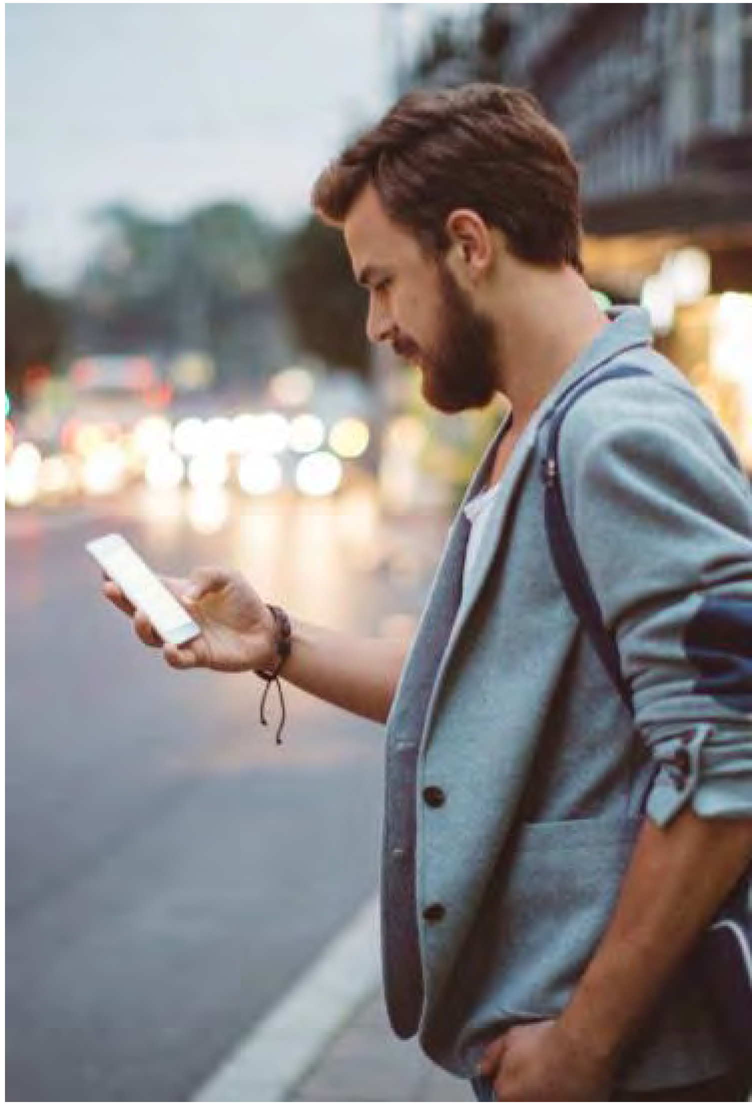
Amber.Perez@co.meeker.mn.us

Who is in the room?

- Social Work
- Eligibility
- Child Support
- Public Health
- Office Support
- Fiscal

Why manage your Inbox differently?

- ✓ The average office worker receives 121 emails per day.
- ✓ Email fatigue is a major contributor to burnout and job dissatisfaction.
- ✓ Employees spend an average of 28% of their workweek managing their email inbox.
- ✓ 55.6% of email users read emails on a mobile device
- ✓ A Michigan State University study reveals that email overuse hinders managers' leadership ability.



References: Gitnux.com & Sciencedaily.com

How do we start our day?

Checking Email first thing creates distraction and disconnection off the bat.

- Checking email first thing in the morning can start the day off with unnecessary distraction. Being pulled in multiple directions before you can set your intention and map for the day.
- This can end up with us feeling like we are chasing our tail for the majority of the day and not accomplishing anything but responding to and sending emails.

- As a leader, setting aside time first thing in the morning to connect with your team- either by checking in one on one, taking time for a 15-minute huddle to start the day, or asking about their weekend fosters connection. This can also be done via Teams It opens the door to work-related conversation, leaving space for team building and getting questions answered. An agenda isn’t necessary.

So where do we start?

Setting up how your inbox operates and how views and shortcuts are organized can save clicks that add up to saved minutes everyday. Many tools in Outlook allow you to set up the most efficient view of all of the important pieces of your email. We will cover…..

-Using the View Tab for efficient view

-Task and Calendar Views

-Inbox detox

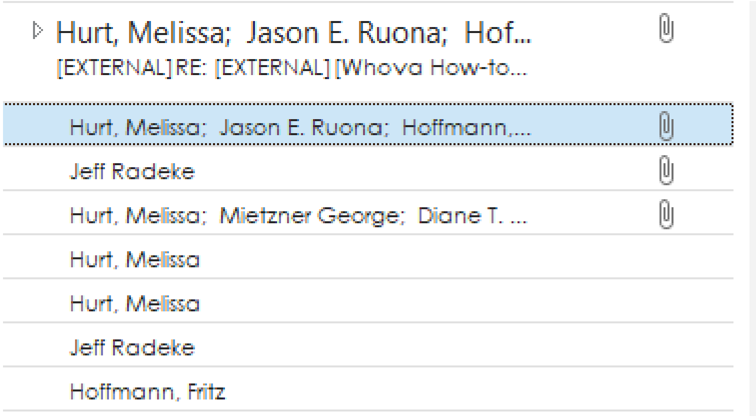
Mailbox Views

Conversation Thread Setting

-Click the View Tab at the top of your Outlook home Screen

-Check the box that says “Show as Conversations”. To turn it off instead, uncheck the box.

-Select the folder you want to apply Conversations view to



▷ Hurt, Melissa; Jason E. Ruona; Hof...
[EXTERNAL] RE: [EXTERNAL] [Whova How-to...

Hurt, Melissa; Jason E. Ruona; Hoffmann,...
Jeff Radeke
Hurt, Melissa; Mietzner George; Diane T. ...
Hurt, Melissa
Hurt, Melissa
Jeff Radeke
Hoffmann, Fritz

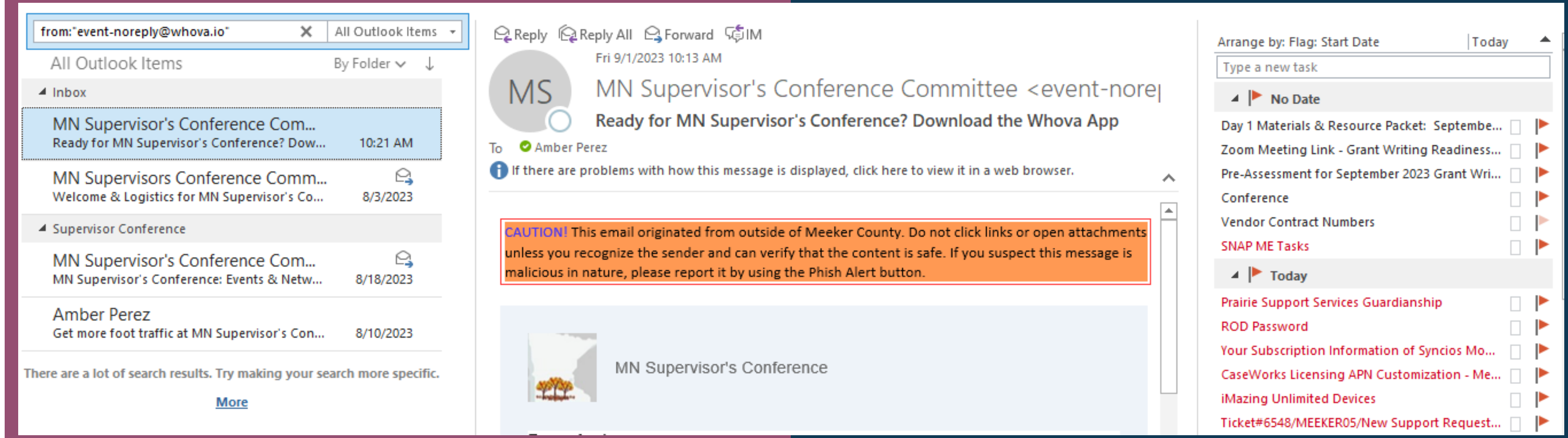
Reading Pane

- Allows you to preview messages and disposition/reply/forward without having to open the email in a separate window. Saves clicks!

Reading Pane

To-Do Bar

- Always have easy view of your flagged items that need follow up so they don’t get buried.



from:"event-noreply@whova.io" ✕ All Outlook Items

All Outlook Items By Folder ↓

◢ Inbox

MN Supervisor's Conference Com...
Ready for MN Supervisor's Conference? Dow... 10:21 AM

MN Supervisors Conference Comm...
Welcome & Logistics for MN Supervisor's Co... 8/3/2023

◢ Supervisor Conference

MN Supervisor's Conference Com...
MN Supervisor's Conference: Events & Netw... 8/18/2023

Amber Perez
Get more foot traffic at MN Supervisor's Con... 8/10/2023

There are a lot of search results. Try making your search more specific.

More

Fri 9/1/2023 10:13 AM

MS

MN Supervisor's Conference Committee <event-nore

Ready for MN Supervisor's Conference? Download the Whova App

To Amber Perez

If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION! This email originated from outside of Meeker County. Do not click links or open attachments unless you recognize the sender and can verify that the content is safe. If you suspect this message is malicious in nature, please report it by using the Phish Alert button.

MN Supervisor's Conference

Arrange by: Flag: Start Date | Today

Type a new task

◢ No Date

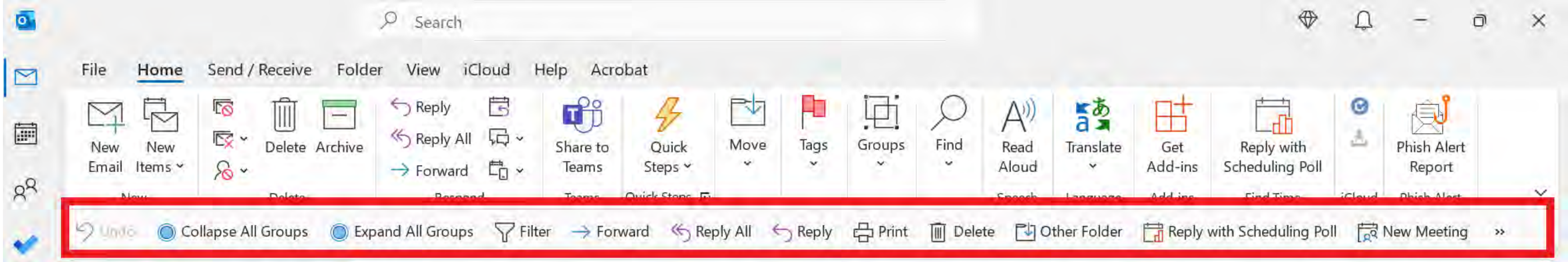
Day 1 Materials & Resource Packet: Septembe... ☐
Zoom Meeting Link - Grant Writing Readiness... ☐
Pre-Assessment for September 2023 Grant Wri... ☐
Conference ☐
Vendor Contract Numbers ☐
SNAP ME Tasks ☐

◢ Today

Prairie Support Services Guardianship ☐
ROD Password ☐
Your Subscription Information of Syncios Mo... ☐
CaseWorks Licensing APN Customization - Me... ☐
iMazing Unlimited Devices ☐
Ticket#6548/MEEKER05/New Support Request... ☐

[View Settings ScreenShare]

2


Search
File
Home
Send / Receive
Folder
View
iCloud
Help
Acrobat
New Email
New Items
Delete
Archive
Reply
Reply All
Forward
Share to Teams
Quick Steps
Move
Tags
Groups
Find
Read Aloud
Translate
Get Add-ins
Reply with Scheduling Poll
Phish Alert Report
Undo
Collapse All Groups
Expand All Groups
Filter
Forward
Reply All
Reply
Print
Delete
Other Folder
Reply with Scheduling Poll
New Meeting

Quick Access Toolbar

Favorite Quick Access Buttons

Reply with Meeting or IM

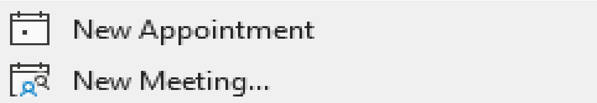
Need to have a deeper conversation or just a quick response?

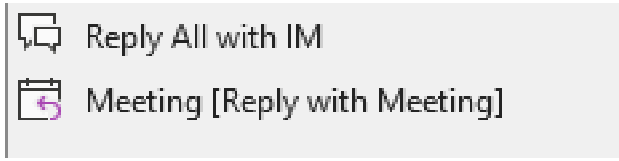
How To

Collapse All Groups & Expand All Groups

This feature is great for when you are doing your Inbox Detox!

Arrange by From/ Collapse all Groups and start deleting!

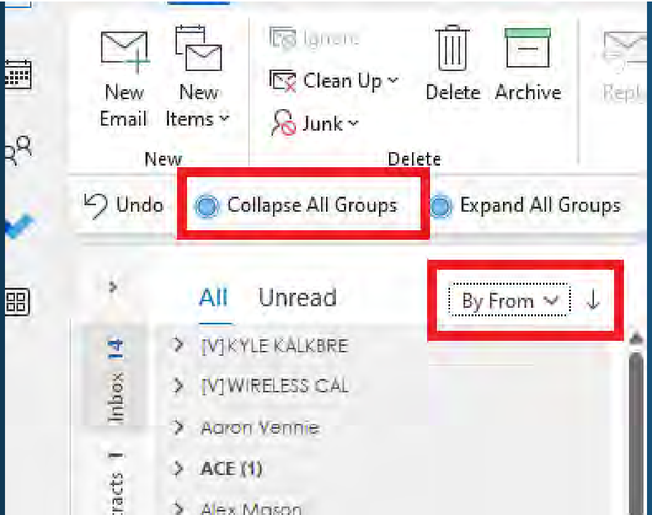

New Appointment
New Meeting...


Reply All with IM
Meeting [Reply with Meeting]

Reply with Scheduling Poll

Reduce the back and forth of aligning calendars for a meeting.

How To


New Email
New Items
Ignore
Clean Up
Junk
Delete
Archive
Repl
New
Delete
Undo
Collapse All Groups
Expand All Groups
All
Unread
By From
Inbox 14
[V]KYLE KALKBRE
[V]WIRELESS CAL
Aaron Vennie
ACE (1)
Alex Mason

New Meeting & New Appointment

Instead of having to navigate to the calendar view in Outlook- block off time on your calendar or schedule a new meeting from the main view

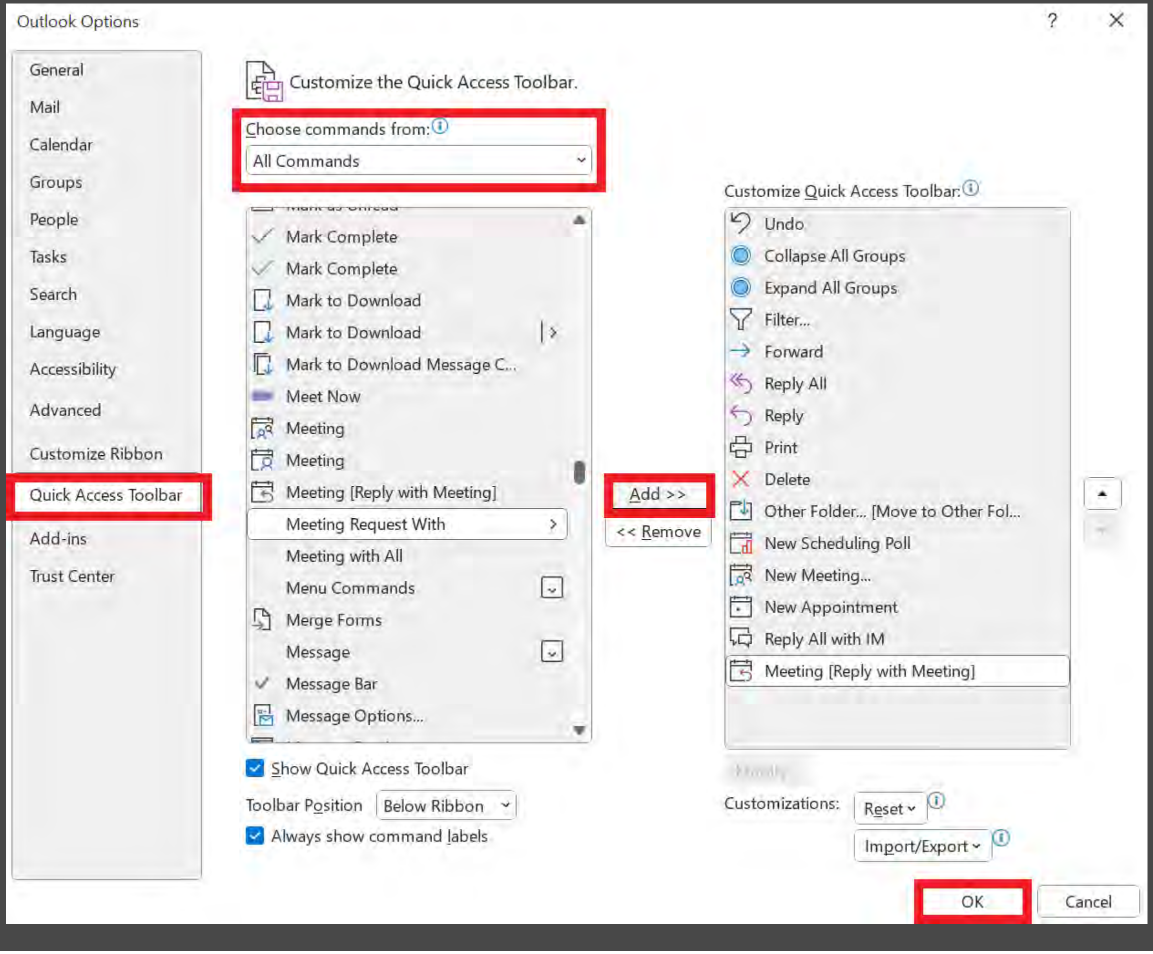
1

Quick Access Toolbar

File/Options/Quick Access Toolbar

Select Choose commands from: All Commands

✓ Check Show Quick Access Toolbar and select the position



Customize the Quick Access Toolbar.

Choose commands from: All Commands

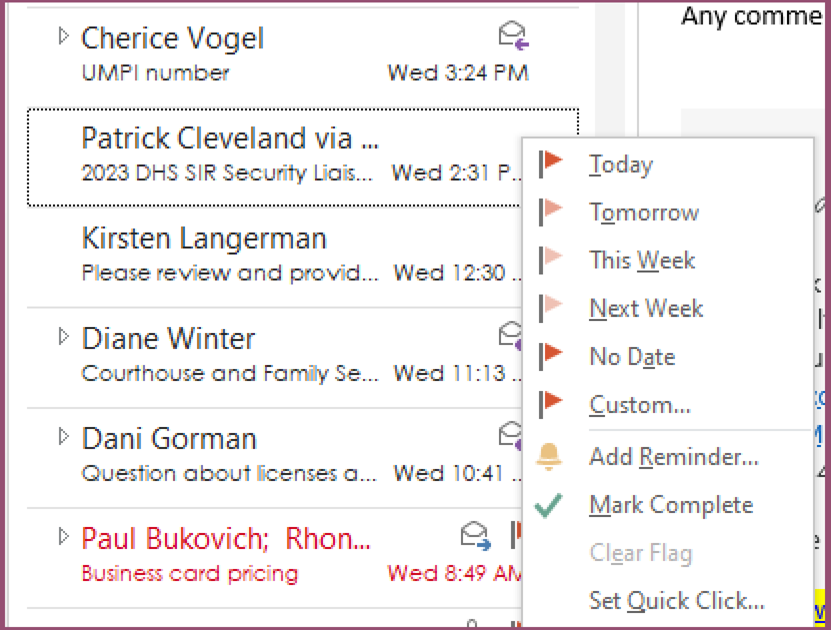
☑ Show Quick Access Toolbar

Toolbar Position: Below Ribbon

☑ Always show command labels

Outlook Options
?
General
Mail
Calendar
Groups
People
Tasks
Search
Language
Accessibility
Advanced
Customize Ribbon
Quick Access Toolbar
Add-ins
Trust Center
Mark Complete
Mark Complete
Mark to Download
Mark to Download
Mark to Download Message C...
Meet Now
Meeting
Meeting
Meeting [Reply with Meeting]
Meeting Request With
Meeting with All
Menu Commands
Merge Forms
Message
Message Bar
Message Options...
Add >>
<< Remove
Customize Quick Access Toolbar:
Undo
Collapse All Groups
Expand All Groups
Filter...
Forward
Reply All
Reply
Print
Delete
Other Folder... [Move to Other Fol...
New Scheduling Poll
New Meeting...
New Appointment
Reply All with IM
Meeting [Reply with Meeting]
Modify
Customizations:
Reset
Import/Export
OK
Cancel

Using Flags and Tasks



Cherice Vogel
UMPI number Wed 3:24 PM

Patrick Cleveland via ...
2023 DHS SIR Security Liais... Wed 2:31 P...

Kirsten Langerman
Please review and provid... Wed 12:30 ...

Diane Winter
Courthouse and Family Se... Wed 11:13 ...

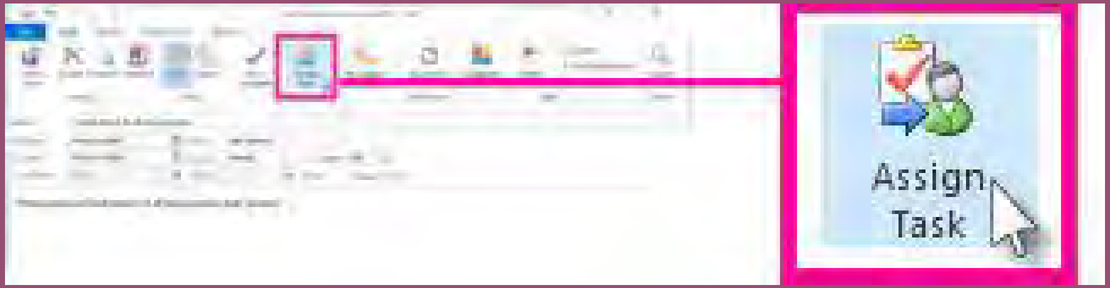
Dani Gorman
Question about licenses a... Wed 10:41 ...

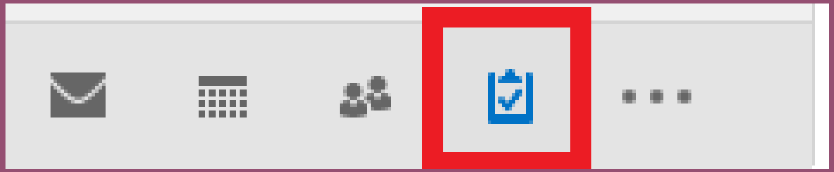
Paul Bukovich; Rhon...
Business card pricing Wed 8:49 AM

Any comme

Today
Tomorrow
This Week
Next Week
No Date
Custom...
Add Reminder...
Mark Complete
Clear Flag
Set Quick Click...

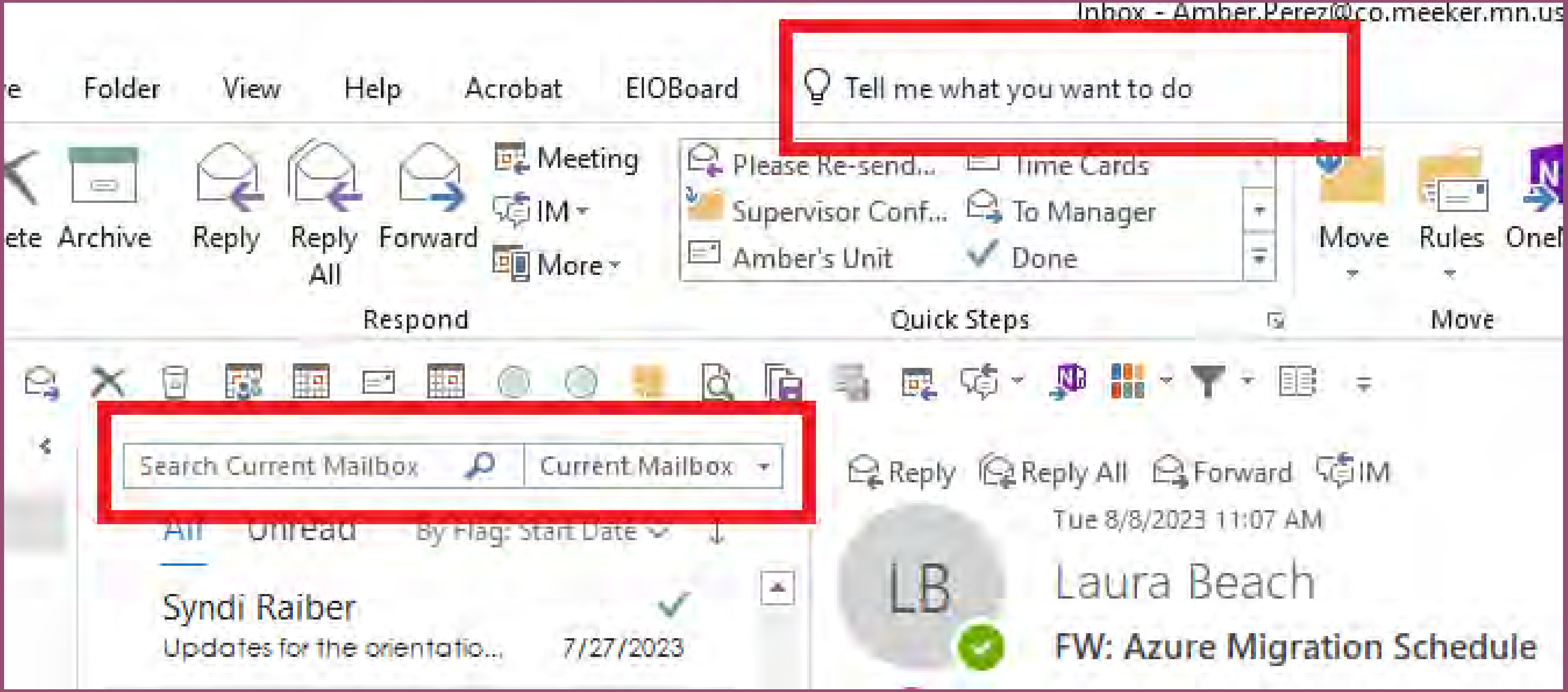
- Flagging an email
- Assigning tasks
- Setting a reoccurrence
- Reviewing completed tasks


Assign Task



Outlook Search Bars

Two Bars- Two Purposes


Inbox - Amber.Perez@co.meeker.mn.us
Folder
View
Help
Acrobat
EIOBoard
Tell me what you want to do
Archive
Reply
Reply All
Forward
Meeting
IM
More
Respond
Please Re-send...
Time Cards
Supervisor Conf...
To Manager
Amber's Unit
Done
Quick Steps
Move
Rules
Move
Search Current Mailbox
Current Mailbox
All
Unread
By Flag: Start Date
Reply
Reply All
Forward
IM
LB

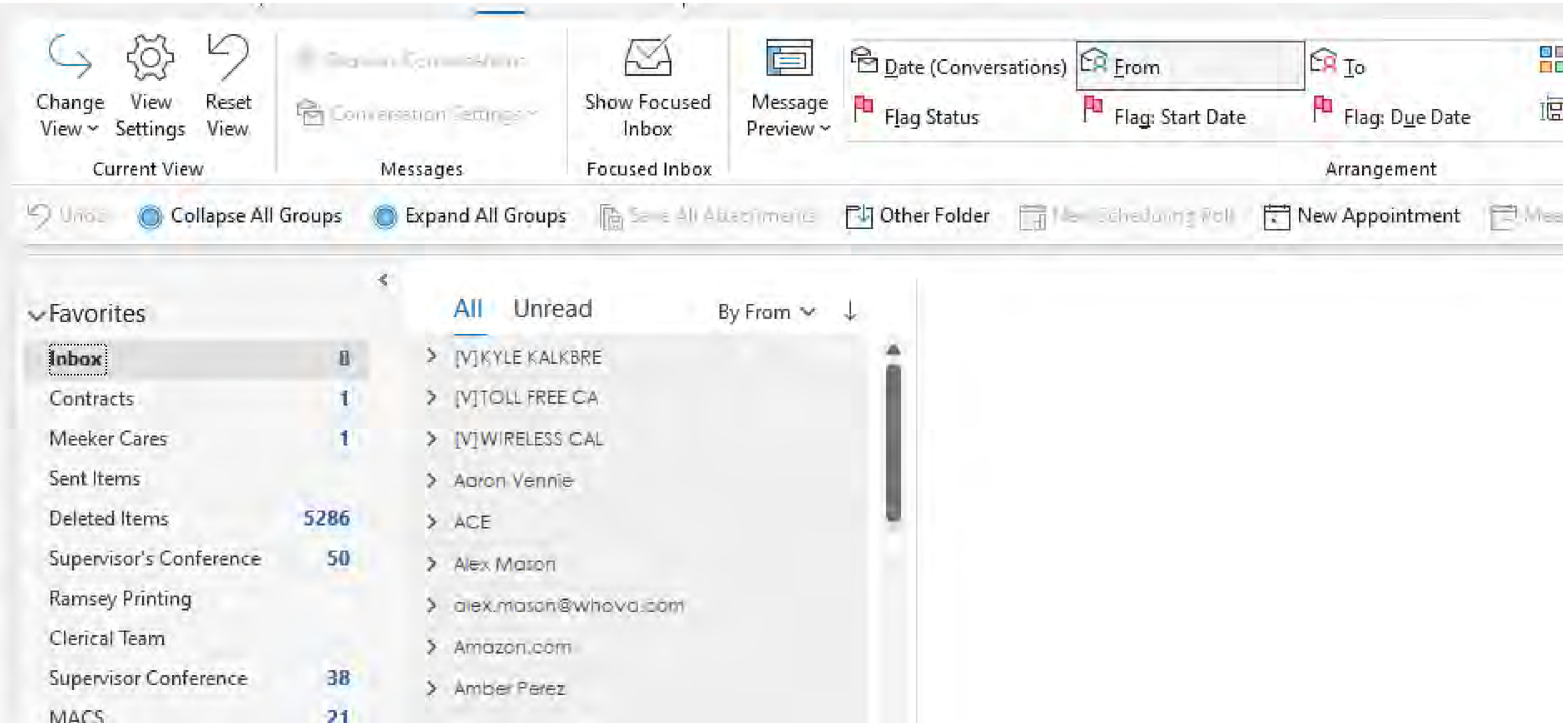
Syndi Raiber
Updates for the orientatio... 7/27/2023

Tue 8/8/2023 11:07 AM
Laura Beach
FW: Azure Migration Schedule

Inbox Detox

The Best View to power through the Detox

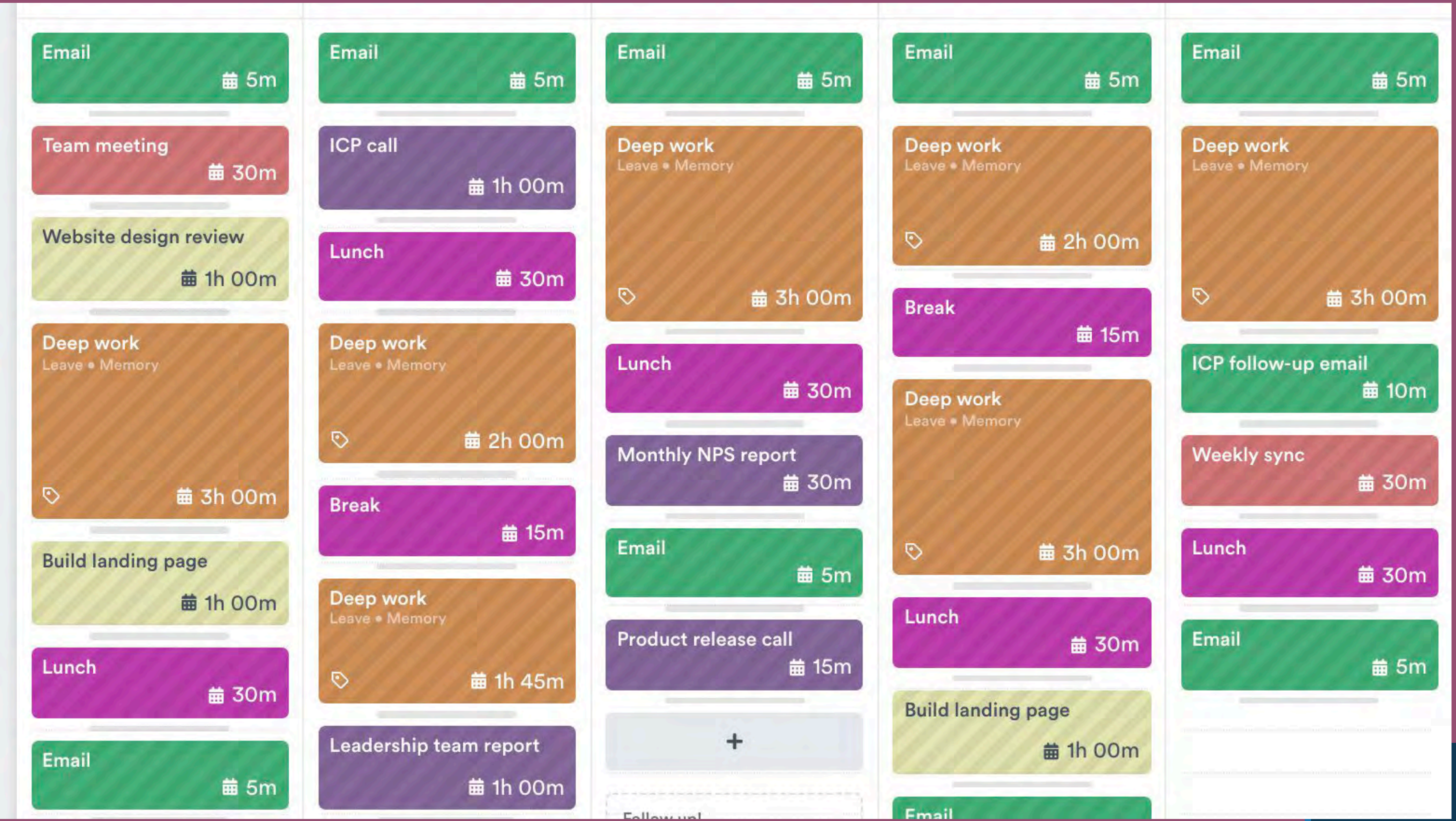
- Organize by “From”
- Collapse All- Quick Access
- Drag and Drop to pinned folders
- Review and delete by contact
- Flag items that need follow-up


Change View
View Settings
Reset View
Current View
Ignore Conversation
Conversation Settings
Messages
Show Focused Inbox
Focused Inbox
Message Preview
Date (Conversations)
From
To
Flag Status
Flag: Start Date
Flag: Due Date
Arrangement
Undo
Collapse All Groups
Expand All Groups
Save All Attachments
Other Folder
New Scheduling Poll
New Appointment
Favorites
Inbox 8
Contracts 1
Meeker Cares 1
Sent Items
Deleted Items 5286
Supervisor's Conference 50
Ramsey Printing
Clerical Team
Supervisor Conference 38
MACS 21
All
Unread
By From
[V]KYLE KALKBRE
[V]TOLL FREE CA
[V]WIRELESS CAL
Aaron Vennie
ACE
Alex Mason
alex.mason@whova.com
Amazon.com
Amber Perez

Calendaring in Outlook

Time-Blocking

DND and Scheduling Work Time



- Email 5m
- Team meeting 30m
- Website design review 1h 00m
- Deep work Leave • Memory 3h 00m
- Build landing page 1h 00m
- Lunch 30m
- Email 5m

- Email 5m
- ICP call 1h 00m
- Lunch 30m
- Deep work Leave • Memory 2h 00m
- Break 15m
- Deep work Leave • Memory 1h 45m
- Leadership team report 1h 00m

- Email 5m
- Deep work Leave • Memory 3h 00m
- Lunch 30m
- Monthly NPS report 30m
- Email 5m
- Product release call 15m
- +
- Follow up!

- Email 5m
- Deep work Leave • Memory 2h 00m
- Break 15m
- Deep work Leave • Memory 3h 00m
- Lunch 30m
- Build landing page 1h 00m
- Email

- Email 5m
- Deep work Leave • Memory 3h 00m
- ICP follow-up email 10m
- Weekly sync 30m
- Lunch 30m
- Email 5m

Why is time blocking so effective?

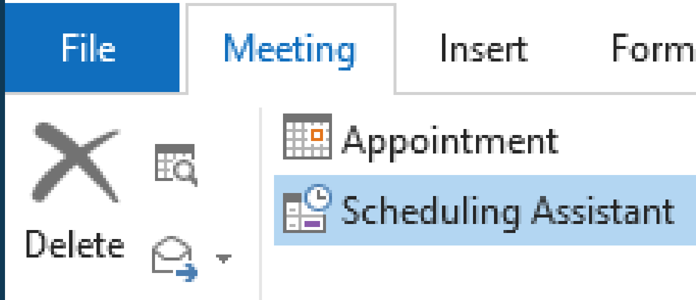
- It promotes focused “deep work”
- It helps you knock out “shallow work” more efficiently

https://todoist.com/productivity-methods/time-blocking

Scheduling Meetings

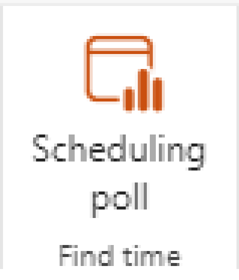
Scheduling Assistant

- Using the Scheduling Assistant feature in Outlook calendar is great for internal meetings or meetings with only a few participants.


File
Meeting
Insert
Form
Delete
Appointment
Scheduling Assistant

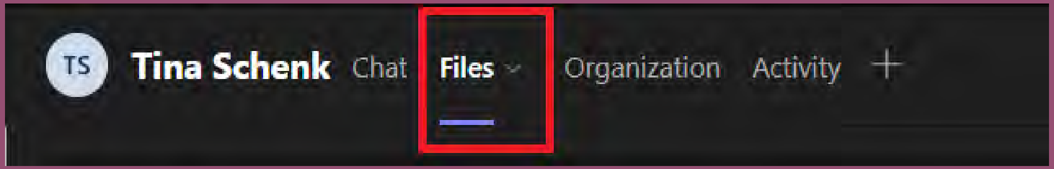
Scheduling Polls

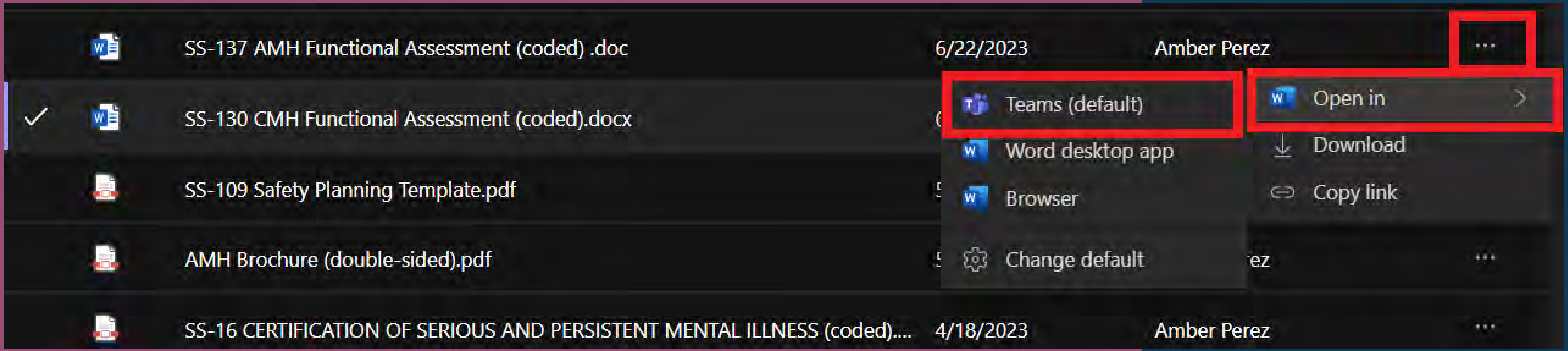
- Great for finding a time that works for large groups
- Also good for participants that haven't shared their calendar with you (external).
- This may only be available in the web version of Outlook depending on your version and IT settings for your Agency.
- For more information about how your agency can get scheduling polls in the desktop version please forward this link to your IT dept. HERE


Scheduling poll
Find time

Microsoft Teams

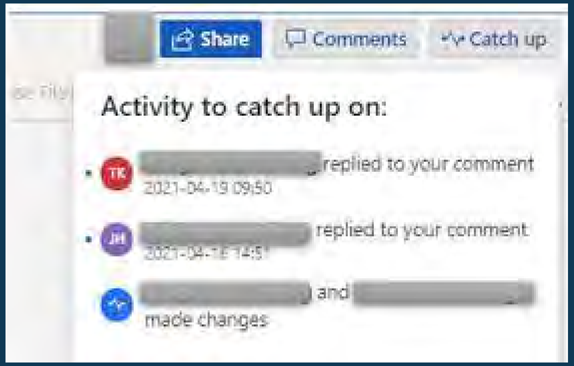
Collaboration at it’s Finest


TS
Tina Schenk
Chat
Files
Organization
Activity
+



SS-137 AMH Functional Assessment (coded) .doc	6/22/2023	Amber Perez
SS-130 CMH Functional Assessment (coded).docx	6	
SS-109 Safety Planning Template.pdf	5	
AMH Brochure (double-sided).pdf	5	ez
SS-16 CERTIFICATION OF SERIOUS AND PERSISTENT MENTAL ILLNESS (coded)....	4/18/2023	Amber Perez

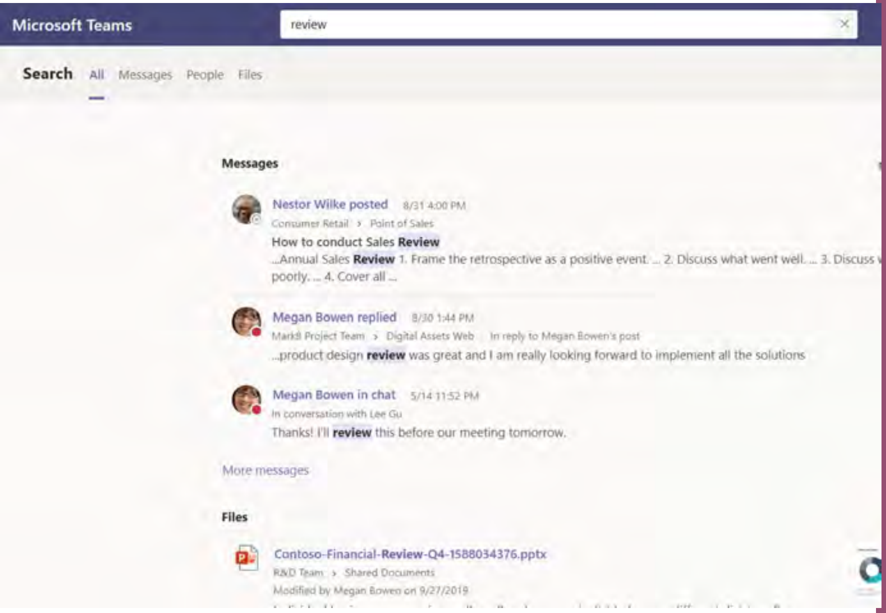
Teams (default)
Word desktop app
Browser
Change default
Open in
Download
Copy link


Share
Comments
Catch up

Activity to catch up on:

- [redacted] replied to your comment 2021-04-19 09:50
- [redacted] replied to your comment 2021-04-18 14:5
- [redacted] and [redacted] made changes

- Collaboration on documents can happen in real time, where everyone can see, there is no saving or sending edits.
- Never have to worry about who has the latest copy of the document.
- Team documents can be housed in a central location without worrying about if shortcuts will break if documents are moved or re-named.
- This function is available in the Chat or Team portion of Teams in the Files tab.
- Files housed here can also be downloaded for use outside of Teams.


Microsoft Teams
review
Search
All
Messages
People
Files

Messages

Nestor Wilke posted 8/31 4:00 PM
Consumer Retail › Point of Sales
How to conduct Sales **Review**
...Annual Sales **Review** 1. Frame the retrospective as a positive event. ... 2. Discuss what went well. ... 3. Discuss
poorly. ... 4. Cover all ...

Megan Bowen replied 8/30 1:44 PM
Mark8 Project Team › Digital Assets Web In reply to Megan Bowen's post
...product design **review** was great and I am really looking forward to implement all the solutions

Megan Bowen in chat 5/14 11:52 PM
In conversation with Lee Gu
Thanks! I'll **review** this before our meeting tomorrow.

More messages

Files

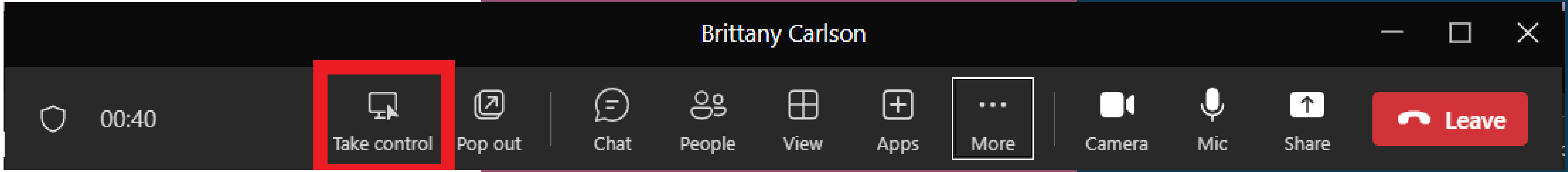
Contoso-Financial-Review-Q4-1588034376.pptx
R&D Team › Shared Documents
Modified by Megan Bowen on 9/27/2019

Using the Search Bar

- You can use the search bar to find people, files, teams, or to search conversations for specific words.
- Enter the keywords you are looking for and hit ENTER- you can sort by what you are looking for.
- It will even search your OneNote and return results from your OneNote notebook.

Take Control of the Screen

- During a Teams Meeting, video, or phone call, if someone is sharing their screen, you can "Take Control" to show them how to do something or fix issues.


Brittany Carlson
00:40
Take control
Pop out
Chat
People
View
Apps
More
Camera
Mic
Share
Leave

Outlook on Mobile

2 Tips to Manage Mobile E-mail

- Set or Change Swipe Options
- Send Availability in Reply

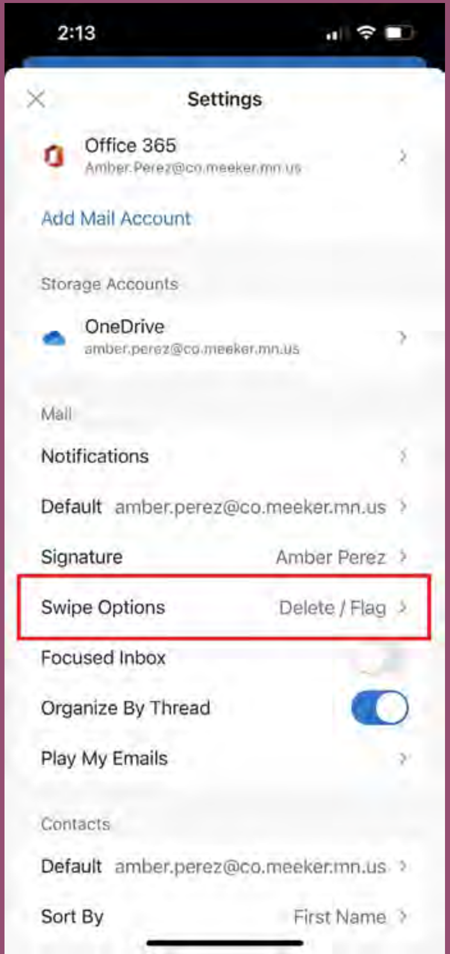
*Must have the Outlook App available in the App Store or Google Play

Set or Change Swipe Options

Click your photo

Settings Wheel

Swipe Options



2:13

Settings

Office 365
Amber.Perez@co.meeker.mn.us

Add Mail Account

Storage Accounts

OneDrive
amber.perez@co.meeker.mn.us

Mail

Notifications

Default amber.perez@co.meeker.mn.us

Signature Amber Perez

Swipe Options Delete / Flag

Focused Inbox

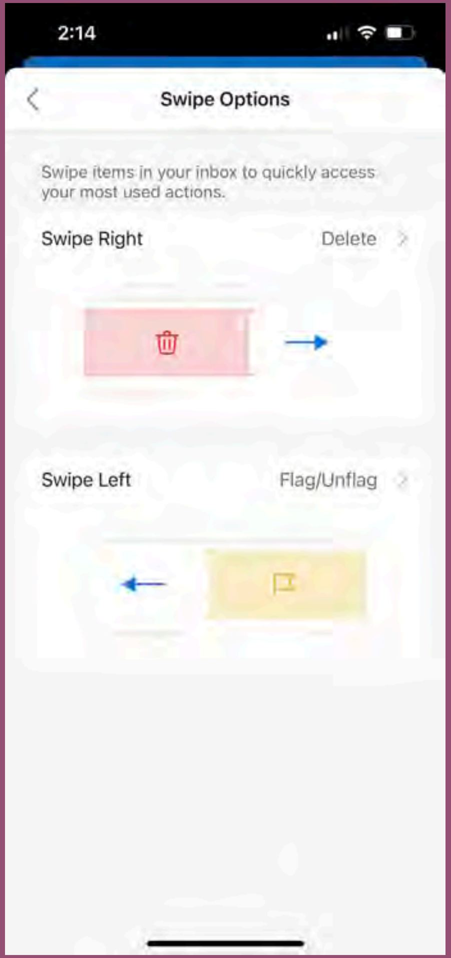
Organize By Thread

Play My Emails

Contacts

Default amber.perez@co.meeker.mn.us

Sort By First Name



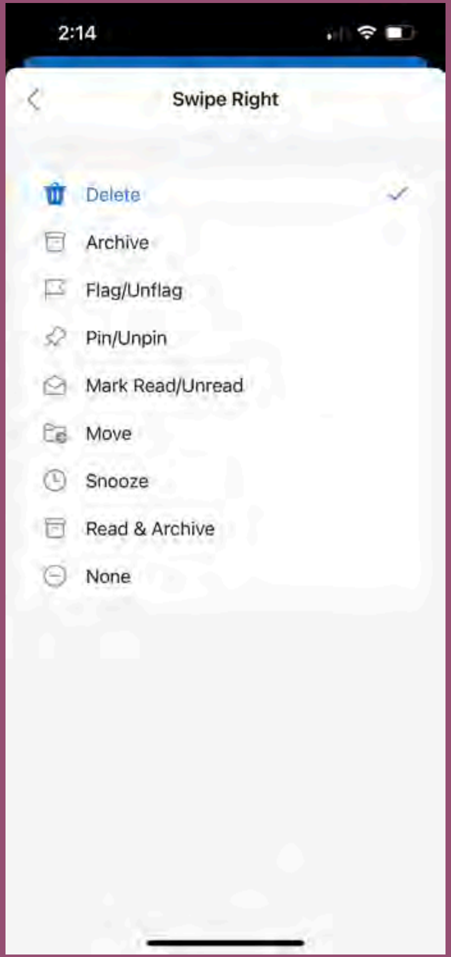
2:14

Swipe Options

Swipe items in your inbox to quickly access your most used actions.

Swipe Right Delete

Swipe Left Flag/Unflag

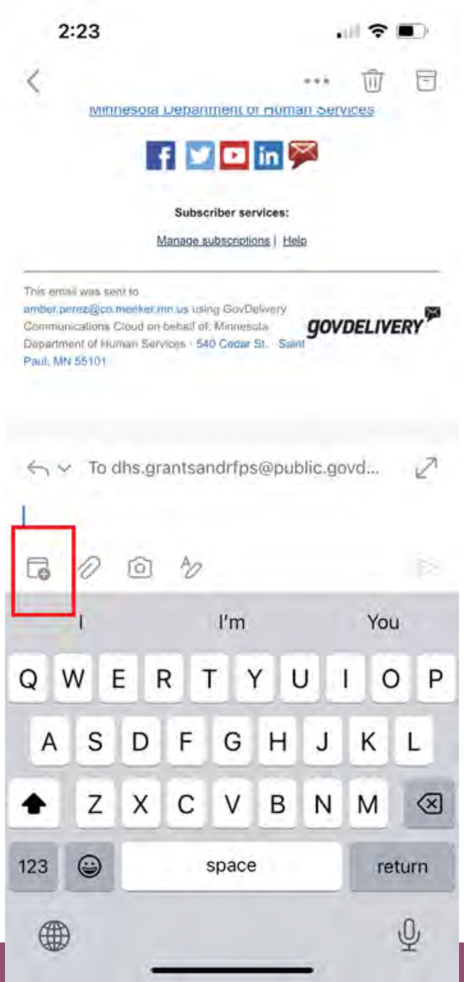


2:14

Swipe Right

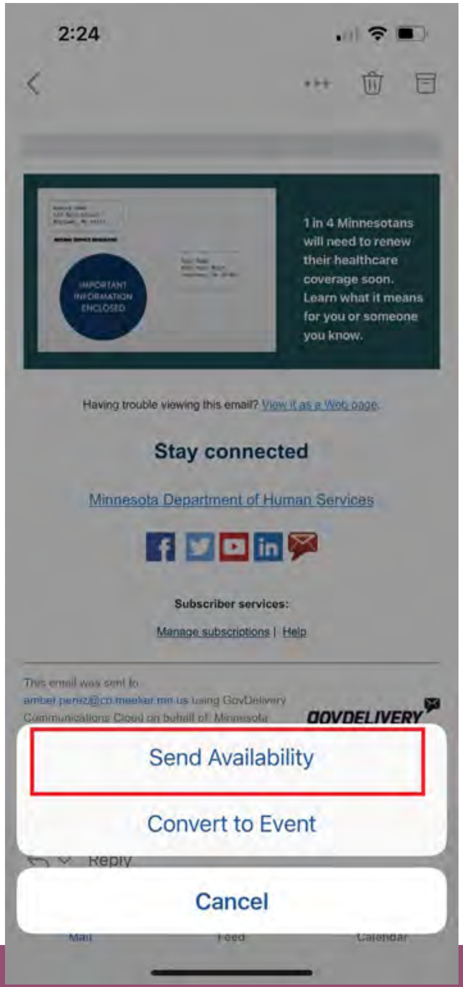
- Delete ✓
- Archive
- Flag/Unflag
- Pin/Unpin
- Mark Read/Unread
- Move
- Snooze
- Read & Archive
- None

- Reply or Reply All
- Choose Calendar Icon
- Create an Event or Send Availability
- Select Time Slots
- Send Availability


2:23
Minnesota Department of Human Services
Subscriber services:
Manage subscriptions | Help
GOVDELIVERY
I
I'm
You
space
return
123

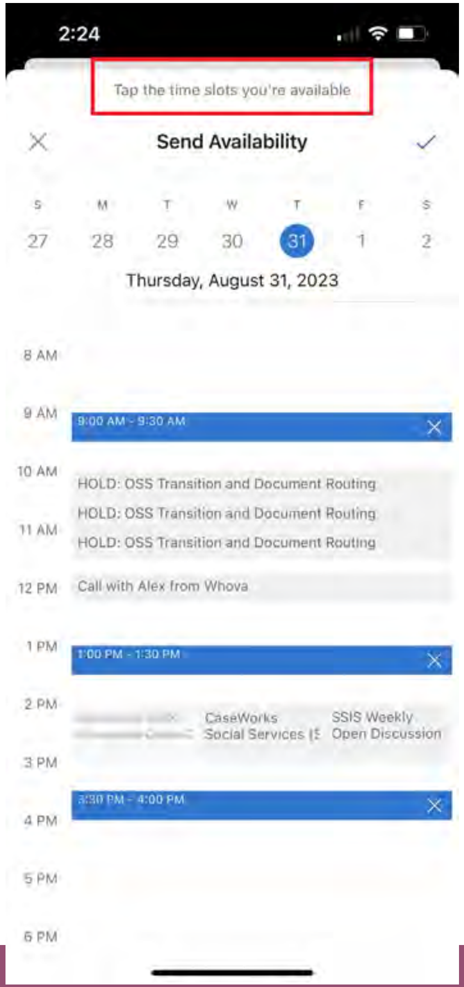
This email was sent to amber.perez@co.meeker.mn.us using GovDelivery Communications Cloud on behalf of: Minnesota Department of Human Services · 540 Cedar St. · Saint Paul, MN 55101

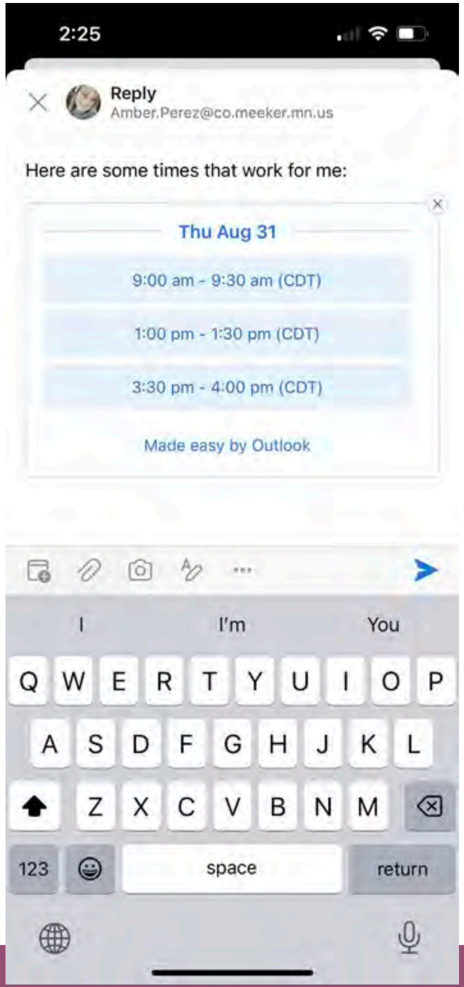
To dhs.grantsandrfps@public.govd...


2:24
IMPORTANT INFORMATION ENCLOSED
Stay connected
Minnesota Department of Human Services
Subscriber services:
Manage subscriptions | Help
GOVDELIVERY
Send Availability
Convert to Event
Cancel
Reply
Mail
Feed
Calendar

1 in 4 Minnesotans will need to renew their healthcare coverage soon. Learn what it means for you or someone you know.

Having trouble viewing this email? View it as a Web page.


2:24
Tap the time slots you're available
Send Availability
S M T W T F S
27 28 29 30 31 1 2
Thursday, August 31, 2023
8 AM
9 AM
10 AM
11 AM
12 PM
1 PM
2 PM
3 PM
4 PM
5 PM
6 PM
9:00 AM - 9:30 AM
HOLD: OSS Transition and Document Routing
HOLD: OSS Transition and Document Routing
HOLD: OSS Transition and Document Routing
Call with Alex from Whova
1:00 PM - 1:30 PM
CaseWorks Social Services (S
SSIS Weekly Open Discussion
3:30 PM - 4:00 PM


2:25
Reply
Amber.Perez@co.meeker.mn.us
I
I'm
You
space
return
123

Here are some times that work for me:

Thu Aug 31

9:00 am - 9:30 am (CDT)

1:00 pm - 1:30 pm (CDT)

3:30 pm - 4:00 pm (CDT)

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Questions???

Amber.Perez@co.meeker.mn.us

thank you