Using Quick Steps



Objective

This document provides instructions on how to use Quick Steps in Outlook 2013 (after your LAUSD mailbox has migrated to Office 365).

Part 1 - What are Quick Steps?

Quick Steps are buttons that perform the routine actions you do over and over. For example, you can use Quick Steps to do any of the following actions (and more) with just one click:

- Save event schedules in a specific folder
- Send a weekly reminder to your team to complete their time cards
- Forward a parent's message to your Assistant Principal
- Schedule a department meeting



Each Quick Step has a simple set-up process where you specify the details of the action. By pre-programming these actions, Quick Steps save you time.

Quick Step	Action	Details You Need to Specify
Move to Folder	Moves the selected message to a folder that you specify	Select a destination folder
To Manager	Forwards the selected message to a person that you specify	Rename the Quick StepSelect your manager in the To field
Team Email	Addresses a new message to a list of people that you specify	Rename the Quick StepSelect your teammates in the To field
Done	Marks a message as read, and moves it to a folder that you specify	Mark messages as complete and/or readSelect the destination folder
Create New	Creates a new Quick Step button for a different action	See Part 3 - Create a New Quick Step
Reply & Delete	Replies to the sender of the selected message and deletes the original message or conversation*	N/A (no details are required)

Part 2 - Set Up an Existing Quick Step

1. Select the Home tab in the top left corner, and hover over the Quick Steps buttons to view their descriptions.



2. Click a Quick Step button that you want to set up for your mailbox.



3. This opens a First Time Setup window. Follow the prompts to specify the details of the action.

First Time Setup	First Time Setup
First Time Setup This quick step forwards the currently selected mail message to the people specified below. Click Options to specify extra text in the subject line or body of the message. After this Quick Step is created, you do not have to enter this information again. Name To Manager Actions Forward To Qptions Save Cancel	First Time Setup This quick step forwards the currently selected mail message to the people specified below. Click Options to specify extra text in the subject line or body of the message. After this Quick Step is created, you do not have to enter this information again.
Blank Options (To Manager example)	Selected Options (To Manager example)

4. Click **Save** or **OK** to apply your settings to the Quick Step button.

Move to folder	C To Dan	•
Reply & Delete	 Done Create New 	Ŧ
Quic	k Steps	G.

5. Select a message, and click the Quick Step button.



6. Outlook performs the action according to the details you entered in step 3 above.

E [™] 🖶 ち び ↑ ↓ ∓ FW: Action	required on new partner account - Message (H	ITML)	? 4	3 - E ×
FILE MESSAGE INSERT OPTIONS FORMAT	TEXT REVIEW			
$\begin{array}{c c c c c c c c c c c c c c c c c c c $	Address Check Book Names Include	Follow Up * Assign Policy + Low Importance Tags 5	Q Zoom Zoom	Apps for Office Apps
To Dan Jump Send Subject FW: Action required on new partner accounts	nt			
From: Renee Lo Sent: Tuesday, May 27, 2014 1:26 PM To: Karen Berg Subject: Action required on new partner account				

Part 3 - Create a New Quick Step

1. Select the **Home** tab in the top left corner, and click **Create New** in the Quick Steps section.

o 🗄 🔊	Ŧ		In	box - juliani@sadatraiı
FILE HC	SEND / RECEIVE	FOLDER VIEW		
New New Email Items •	ि Ignore Ignore Clean Up ▼ Delete Junk ▼	Reply Reply Forward More *	Move to folder Team Email Reply & Delete Create New p	
New	Delete	Respond	Quick Steps	ra Mo
▲ Favorites	Favorites Search Current Mailbox (Ctrl+E) Cu Create New Create New Create your own quick step.			
Pipeline		All Unread	By Date (Conversations) *	

2. This opens the Edit Quick Step window. Type a name for this Quick Step in the **Name** field.

Edit Quick Step		? ×
	le: Quick Step	
Add actions be	elow that will be performed when this quick step is clicked on.	-
Choose an A	action	×
<u>A</u> dd Action	<u>\</u>	
Optional —		- 1
S <u>h</u> ortcut key:	Choose a shortcut 💌	
<u>T</u> ooltip text:	This text will show up when the mouse hovers over the quick step.	
	Finish Can	cel

3. Click the **Choose an Action** menu, and select the action you want the Quick Step to perform.

Edit Quick Step	? ×
Name: My Quick Step	٦
Add actions below that will be performed when this quick step is clicked on.	. 1
Actions	
Choose an Action	×
Create a task with attachment	- 1
Create a task with text of message	. 1
Respond	. 1
🖃 New Message	. 1
😋 Forward	. 1
🗣 Reply	. 1
Reply All	. 1
📴 Reply With Meeting	. 1
🕒 Forward message as an attachn	. 1
Appointment	. 1
🕎 New Meeting	. 1
Create an appointment with attachment	- 1
Create an appointment with text of message	. 1
I Conversations	
Always move messages in this conversation	
Ignore messages in this conversation ↓ nce	el

4. Click **Show Options**.

Edit Quick Step	? ×
Name: Reply With Meeting	٦
Actions	- 1
Reply With Meeting	×
Add Action	
Optional Shortcut key: Choose a shortcut 💌	-
Iooltip text: This text will show up when the mouse hovers over the quick step.	
Finish Can	cel

5. This opens fields and menus related to the action. Follow the prompts to specify the details of the action.

dit Quick Step	? ×	Edit Quick Step
Name: Reply With Meeting		Name: Reply With Meeting
Add actions below that will be performed when this quick step is clicked on. Actions	- I.	Edit the actions the quick step performs. Actions
📴 Reply With Meeting	- ×	🕎 Reply With Meeting
To Hide Options Subject: RE: <subject> Location: Importance: Importance: No Change Text: Importance: Automatically send after 1 minute delay. Add Action Optional Shortcut key: Choose a shortcut Iooltip text: This text will show up when the mouse hovers over the quick step.</subject>		To Mide Options Subject: RE: <subject> Location: My Office Importance: No Change Text: Hi, let's discuss the message below.] Automatically send after 1 minute delay. Add Action Optional Shortcut key: Choose a shortcut Ioolitip text: This text will show up when the mouse hovers over the quick step.</subject>
Finish	Cancel	Selected Ontions (Reply With Meeting example)

6. To add an action, click the **Add Action** button, and repeat steps 3-5. To delete an action, click the **X** to the right of the Choose an Action menu.

Edit Quick Step ? >	<
Name: Reply With Meeting Add actions below that will be performed when this quick step is clicked on.	
Actions	
🕎 Reply With Meeting 📃 🗙	
Show Options *	
Shortcut key: Choose a shortcut	
Iooltip text: This text will show up when the mouse hovers over the quick step.	
Finish Cancel	

7. Click **Finish** to apply your settings. The new Quick Step button appears at the top of the Quick Step list.

📴 Reply With Mee	🛀 Move to folder	🕒 To Dan	*
🖃 Tean amail	🗸 Done	🗣 Reply & Delete	-
🌮 Create New			Ŧ
	Quick Steps		Fa

8. When appropriate, click the Quick Step button.

Reply Reply Forward More *	Reply With Mee Move to folder Test ail Creating Done	다 To Dan 오 Reply & Delete	Move Rules Or
Respond	Quick Steps		r _a Move
Search Current Mailbox (Ctrl+E)	🔎 Current Mailbox 👻	🔓 Reply 🛛 🕞 Re	ply All 😋 Forward
All Unread	3y Date (Conversations) * Newest 🎍 📥	67.4 B	Mon 5/26/2014 2:11 PM
Christa Geller	Û		Christa Geller
Internship Program Hello -	5/26/2014		Internship Program

9. Outlook performs the action(s) according to the settings you entered above.

🛱 🖥 🔊 🖻	$\uparrow \downarrow =$		RE: Internship Program - Meeting			
FILE MEETING	INSERT FORMAT T	ext review				
Delete 🕞 Forward 🔹	Appointment Scheduling Assistant	Lync Meeting Meeting Notes	Cancel Invitation	Show As: Busy Reminder: 15 minutes	Recurrence	
Actions	Show	Lync Meet Meeting.	. Attendees	Options	Ga .	
1 You haven't sent this meeting invitation yet.						
То	Christa Geller;					
Subject	RE: Internship Program					
Send Location	My Office				▼ Rooms	
Start time	Mon 6/23/2014	4:30 PM	✓ All day event			
End time	Mon 6/23/2014	5:00 PM	•			
Hi, let's discuss the message below.						
From: Christa Geller Sent: Monday, May 26, 2014 2:11 PM						
Subject: Internship Program						
In Shared Folder 🕎 Calendar						