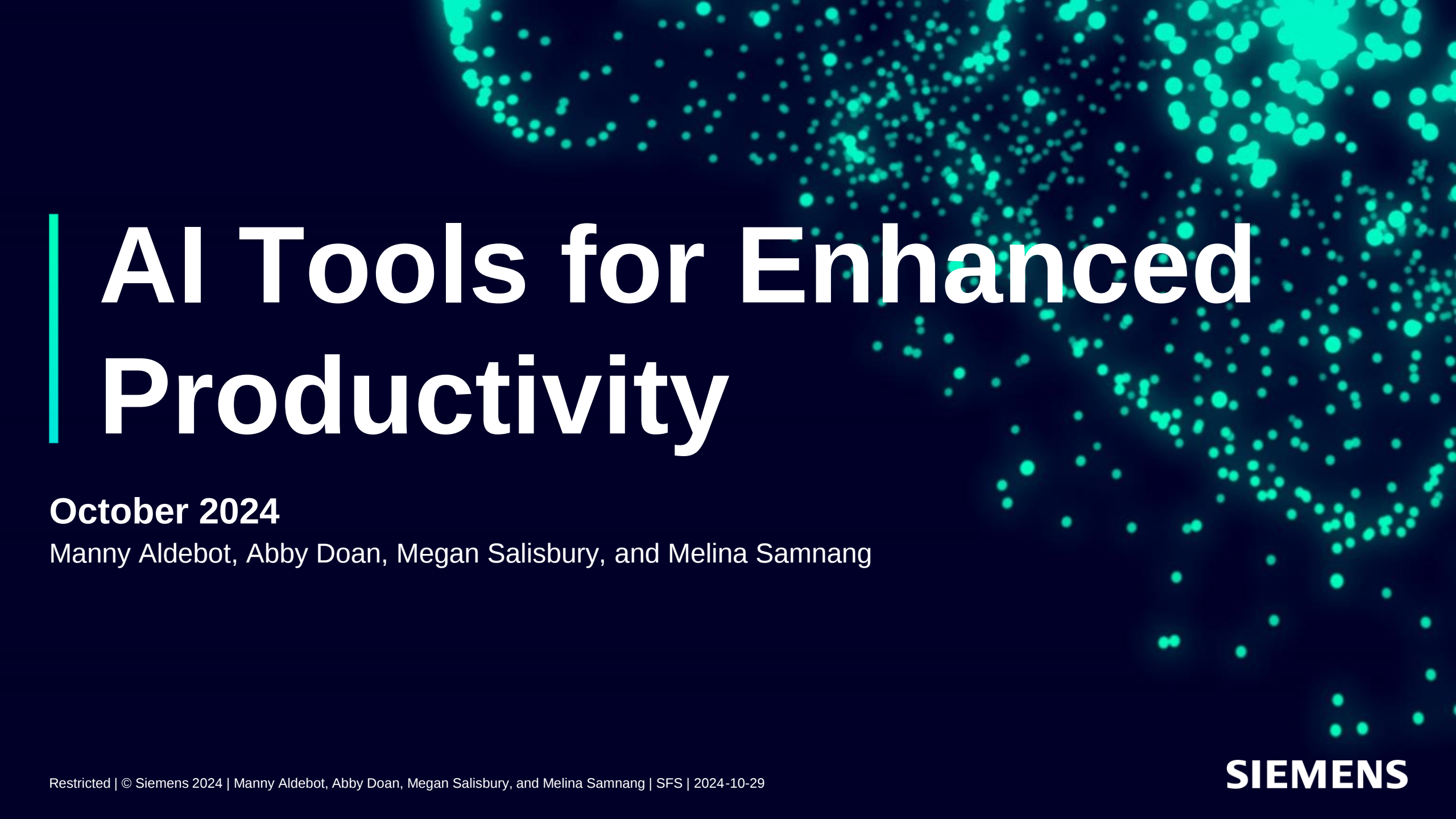


How many unread emails are in your
inbox?



AI Tools for Enhanced Productivity

October 2024

Manny Aldebot, Abby Doan, Megan Salisbury, and Melina Samnang

Our Team



Manny Aldebot

Past Rotations:

- SI RSS PC
- SI EA FP&A
- DI PA FP&A
- SFS PS-AM PF

About Me:

- Penn State Class of '22
- Energy Policy and Automation Enthusiast



Megan Salisbury

Past Rotations:

- SFS AC PF AM CA

About Me:

- University of Arizona '24



Abby Doan

Past Rotations:

- SI EP Project Execution
- SMO RI FP&A
- SFS PS-AM BD & CLE

About Me:

- UNC Chapel Hill Class of '23
- Kenan-Flagler Business School



Melina Samnang

Past Rotations:

- SI RSS PC
- SI EP FIN
- SFS PS-AM BC

About me:

- University of Central Florida Class of '23

AI Tools for Enhanced Productivity

Does This Bother You?

So many unread emails!

The screenshot shows the Microsoft Outlook interface. On the left, the 'Favorites' sidebar is visible, with 'Inbox' highlighted and showing 1669 unread emails. A red arrow points from the text 'So many unread emails!' to the 'Inbox' folder. The main pane displays a list of emails under the 'Today' group. The emails are as follows:

From	Subject	Received	Size
IT M365 Notifications	Salisbury, Megan (CF R NAM US FLDP) wants t...	Thu 10/10/2024 3:34 PM	172 KB
IT M365 Notifications	I'd like access, please. Accept or decline this request		
IT M365 Notifications	Salisbury, Megan (CF R NAM US FLDP) wants...	Thu 10/10/2024 3:34 PM	134 KB
IT M365 Notifications	I'd like access, please.		
IT M365 Notifications	Salisbury, Megan (CF R NAM US FLDP) wants...	Thu 10/10/2024 3:32 PM	129 KB
IT M365 Notifications	I'd like access, please.		
Discount Programs [External]	AT&T's Signature Program: Save More, Stay C...	Thu 10/10/2024 12:04 PM	275 KB
Discount Programs	Save \$10 per line each month		
Gleitsmann, Gerh... [External]	Updates from All Company, Siemens OpenAI ...	Thu 10/10/2024 2:30 AM	739 KB
Gleitsmann, Gerh...	Siemens AG		
Optum Financial [External]	Take your HSA to the max	Wed 10/9/2024 5:22 PM	162 KB
Optum Financial	Put more into your HSA — for your health and your wealth.		
Discount Programs [External]	Save Up to \$50 on Ikon Pass Save Up to 40...	Wed 10/9/2024 1:06 PM	535 KB
Discount Programs	Shop these exclusive savings while they last		

AI Tools for Enhanced Productivity

Whose Inbox is the Cleanest?



Megan: 11 Emails



Melina: 23 Emails



Abby: 24 Emails



Manny: 3554 Emails

AI Tools for Enhanced Productivity

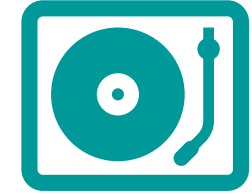
Why is Manny's Inbox Out of Control?



How Would You Recommend Sorting Manny's Inbox?

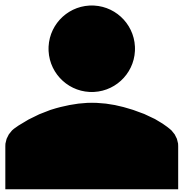
How can we fix this disorganization problem

Let us summarize the strategies from the manual solutions



Manual Strategies

- Creating dedicated folders
- Manually sorting our inbox into these dedicated folders



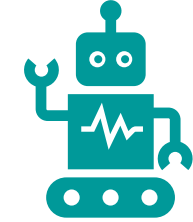
Uncovering Outlook Secrets

“I had to find a way to clean up my inbox and find a way to keep it clean without a serious time commitment.”

“Why not leverage AI to help us develop strategies to manage our email inbox”

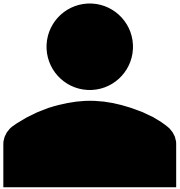
From Manual to Automated...

Using a simple prompt, we were able to develop some insightful strategies that can help those on the call



Prompting with a Defined Problem

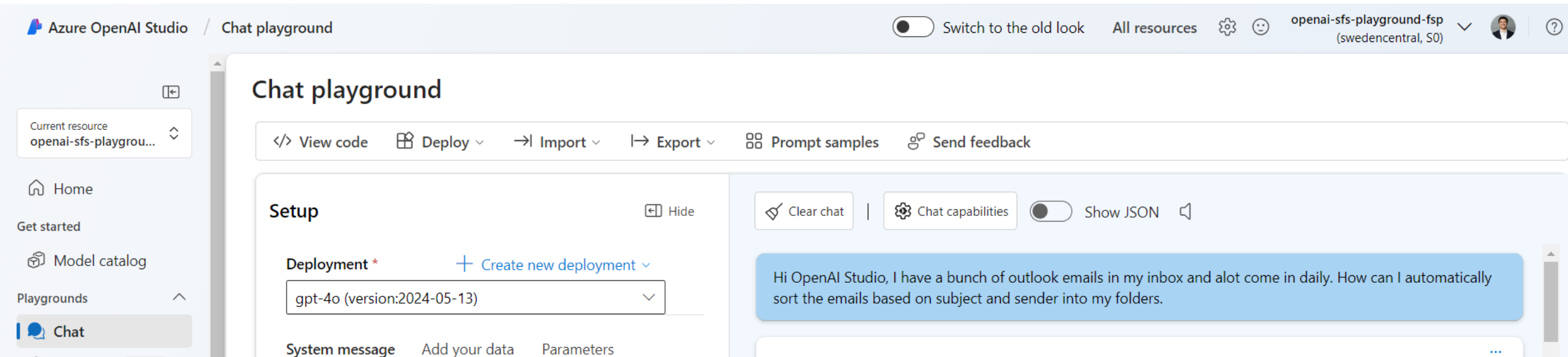
- Summarize the Apps used
- Describe your typical manual process
- Inquire about what portions can be automated using the tools from the app



Uncovering Outlook Secrets

“Let's walk through a simple example that can help you automatically sort your inbox”

How Do We Use AI To Solve The Problem

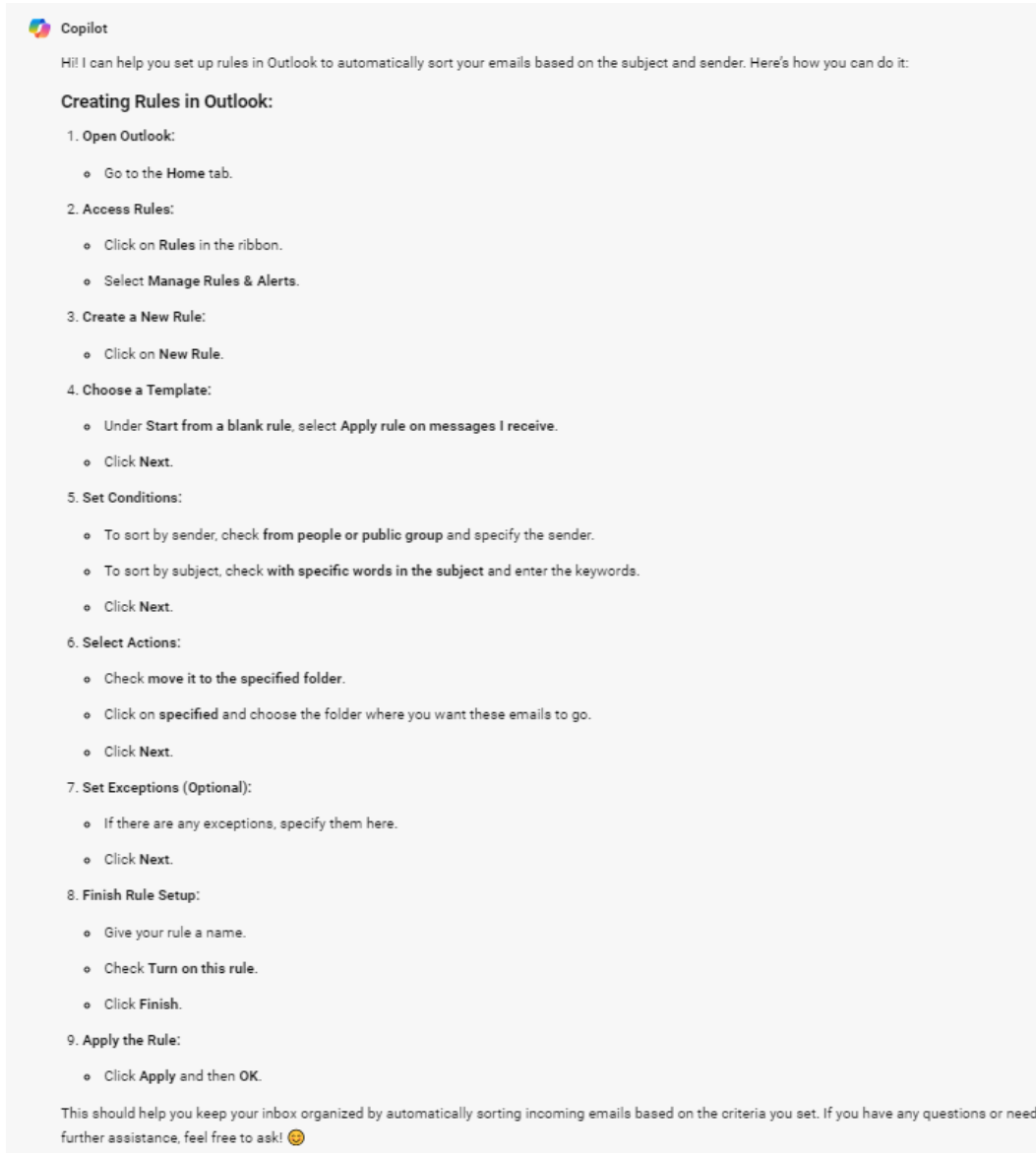


Describe the problem: high volume of emails and unorganized inbox

Mention the Apps of interest: Outlook

Describe key words used in your manually process: Sorting emails by subject and sender

The Output from AI



The screenshot shows the Microsoft Copilot interface. At the top left is the Copilot logo. The main text reads: "Hi! I can help you set up rules in Outlook to automatically sort your emails based on the subject and sender. Here's how you can do it:". Below this is a section titled "Creating Rules in Outlook:". It contains a numbered list of 9 steps, each with sub-points. The steps are: 1. Open Outlook (Go to the Home tab); 2. Access Rules (Click on Rules in the ribbon, Select Manage Rules & Alerts); 3. Create a New Rule (Click on New Rule); 4. Choose a Template (Under Start from a blank rule, select Apply rule on messages I receive, Click Next); 5. Set Conditions (To sort by sender, check from people or public group and specify the sender; To sort by subject, check with specific words in the subject and enter the keywords; Click Next); 6. Select Actions (Check move it to the specified folder; Click on specified and choose the folder where you want these emails to go; Click Next); 7. Set Exceptions (Optional) (If there are any exceptions, specify them here; Click Next); 8. Finish Rule Setup (Give your rule a name; Check Turn on this rule; Click Finish); 9. Apply the Rule (Click Apply and then OK). At the bottom, a concluding sentence says: "This should help you keep your inbox organized by automatically sorting incoming emails based on the criteria you set. If you have any questions or need further assistance, feel free to ask! 😊".

Copilot

Hi! I can help you set up rules in Outlook to automatically sort your emails based on the subject and sender. Here's how you can do it:

Creating Rules in Outlook:

1. **Open Outlook:**
 - Go to the **Home** tab.
2. **Access Rules:**
 - Click on **Rules** in the ribbon.
 - Select **Manage Rules & Alerts**.
3. **Create a New Rule:**
 - Click on **New Rule**.
4. **Choose a Template:**
 - Under **Start from a blank rule**, select **Apply rule on messages I receive**.
 - Click **Next**.
5. **Set Conditions:**
 - To sort by sender, check **from people or public group** and specify the sender.
 - To sort by subject, check **with specific words in the subject** and enter the keywords.
 - Click **Next**.
6. **Select Actions:**
 - Check **move it to the specified folder**.
 - Click on **specified** and choose the folder where you want these emails to go.
 - Click **Next**.
7. **Set Exceptions (Optional):**
 - If there are any exceptions, specify them here.
 - Click **Next**.
8. **Finish Rule Setup:**
 - Give your rule a name.
 - Check **Turn on this rule**.
 - Click **Finish**.
9. **Apply the Rule:**
 - Click **Apply** and then **OK**.

This should help you keep your inbox organized by automatically sorting incoming emails based on the criteria you set. If you have any questions or need further assistance, feel free to ask! 😊

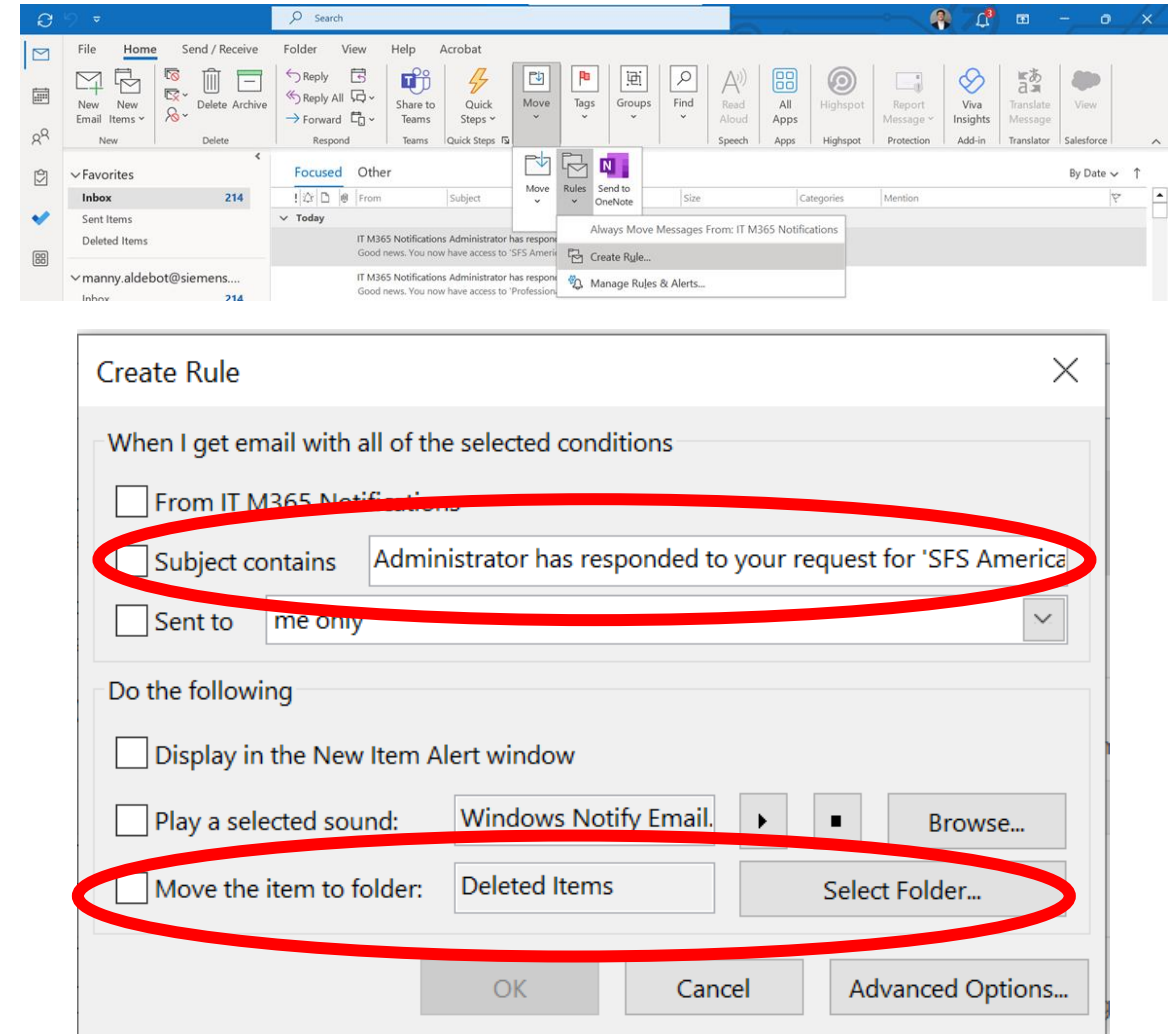
Rules Based on Subject (Method 1)

Rules based on Subject: Searches your inbox (Past and Future) for key words and if there is a match then it automatically moves it to a designated folder

It functions similar to Control Find (Ctrl+F) on excel or a key word search in outlook (Search bar)

Steps:

1. Click on an email you want to create a rule for... (once highlighted)
2. Navigate to the Home → Move → Rules → Create Rule (Keyboard Shortcut Alt + H + ZA + RR + U)
3. Confirm the subject and select the folder then click OK



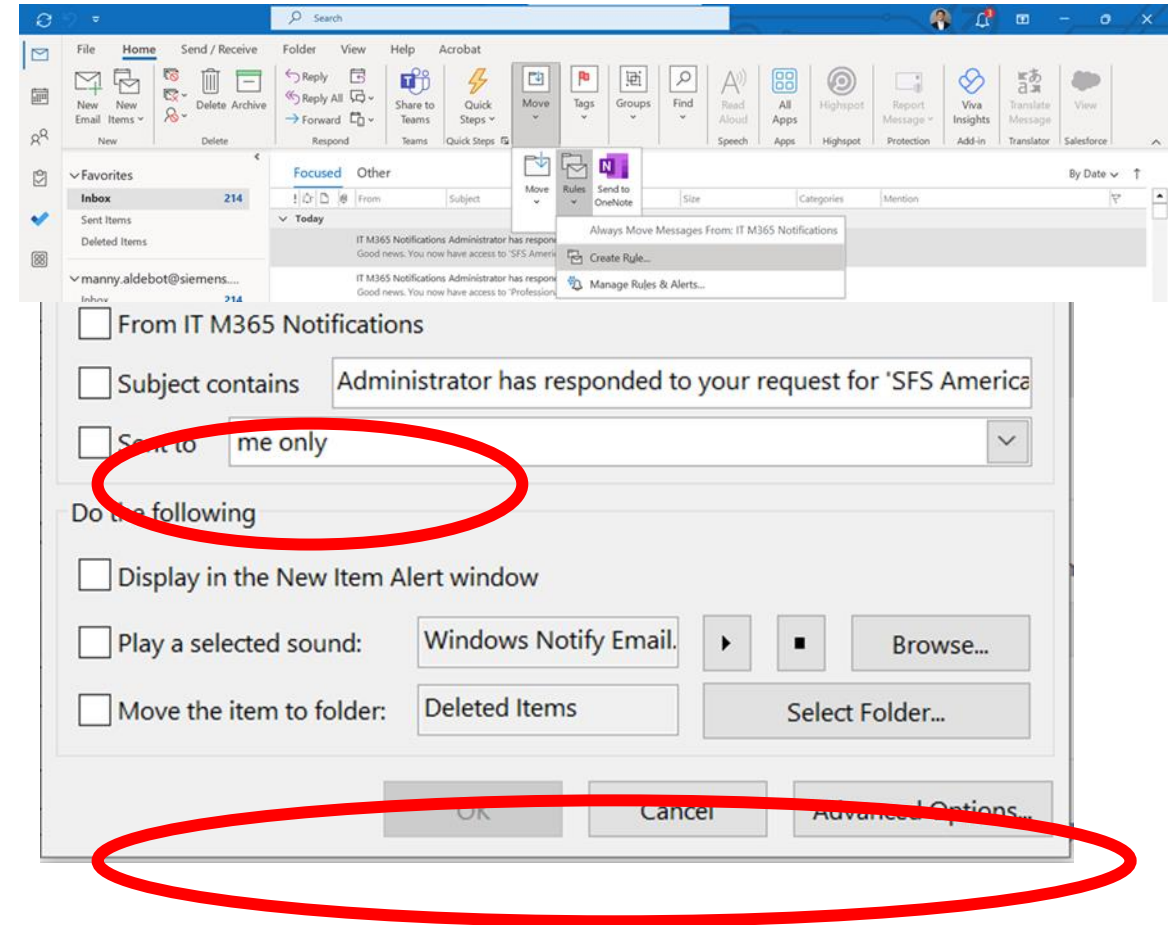
Rules Based on Sender (Method 1)

Rules based on Sender: Searches your inbox (Past and Future) for the sender and if there is a match then it automatically moves it to a designated folder

It functions similar to Control Find (Ctrl+F) on excel or a key word search in outlook (Search bar)

Steps:

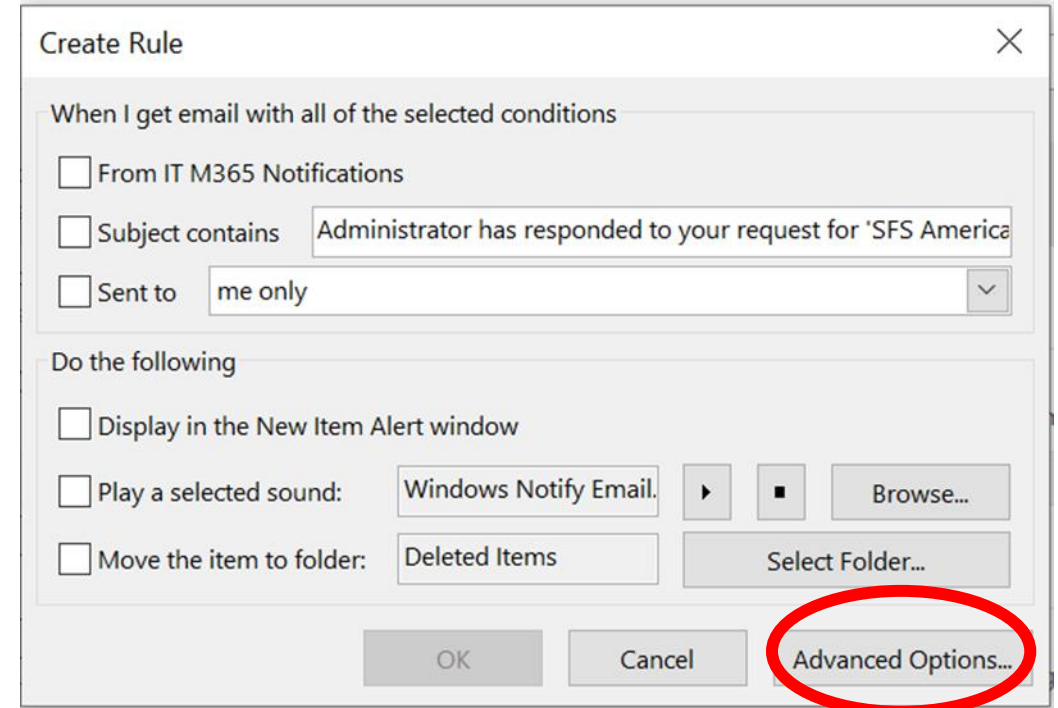
1. Click on an email you want to create a rule for... (once highlighted)
2. Navigate to the Home → Move → Rules → Create Rule (Keyboard Shortcut Alt + H + ZA + RR + U)
3. Confirm the sender and select the folder then click OK



Rules Based on Subject/Sender (Method 2)

If you want to create more conditions, I recommend using advanced options.

You can customize your rule parameters to include date ranges and much more



Create Rule

When I get email with all of the selected conditions

- ☐ From IT M365 Notifications
- ☒ Subject contains Administrator has responded to your request for 'SFS America'
- ☒ Sent to me only

Do the following

- ☐ Display in the New Item Alert window
- ☐ Play a selected sound: Windows Notify Email.
- ☐ Move the item to folder: Deleted Items

OK Cancel **Advanced Options...**

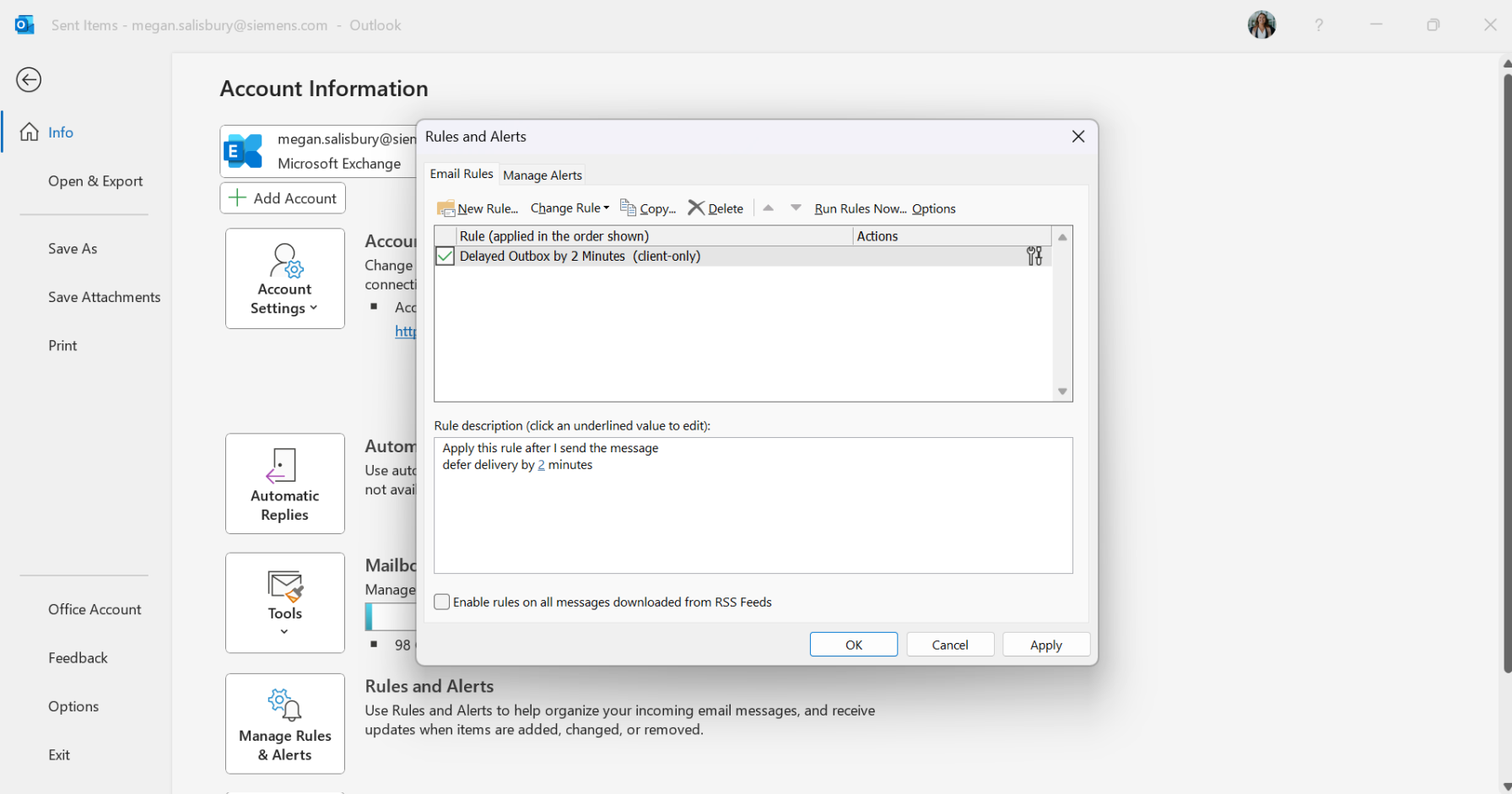
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Delayed Outbox

1. Open **Outlook** and go to the **File** tab.
2. Select **Manage Rules & Alerts**.
3. Click on **New Rule**.
4. Choose **Apply rule on messages I send** and click **Next**.
 - If you want to apply this rule to all outgoing emails, just click **Next** again without selecting any conditions.
5. In the next window, check the box for **defer delivery by a number of minutes**.
6. Click on the underlined text **a number of** and enter the number of minutes you want to delay the emails (up to 120 minutes).
7. Click **Next**, then specify any exceptions if needed, and click **Next** again.
8. Give your rule a name, ensure the **Turn on this rule** box is checked, and click **Finish**.

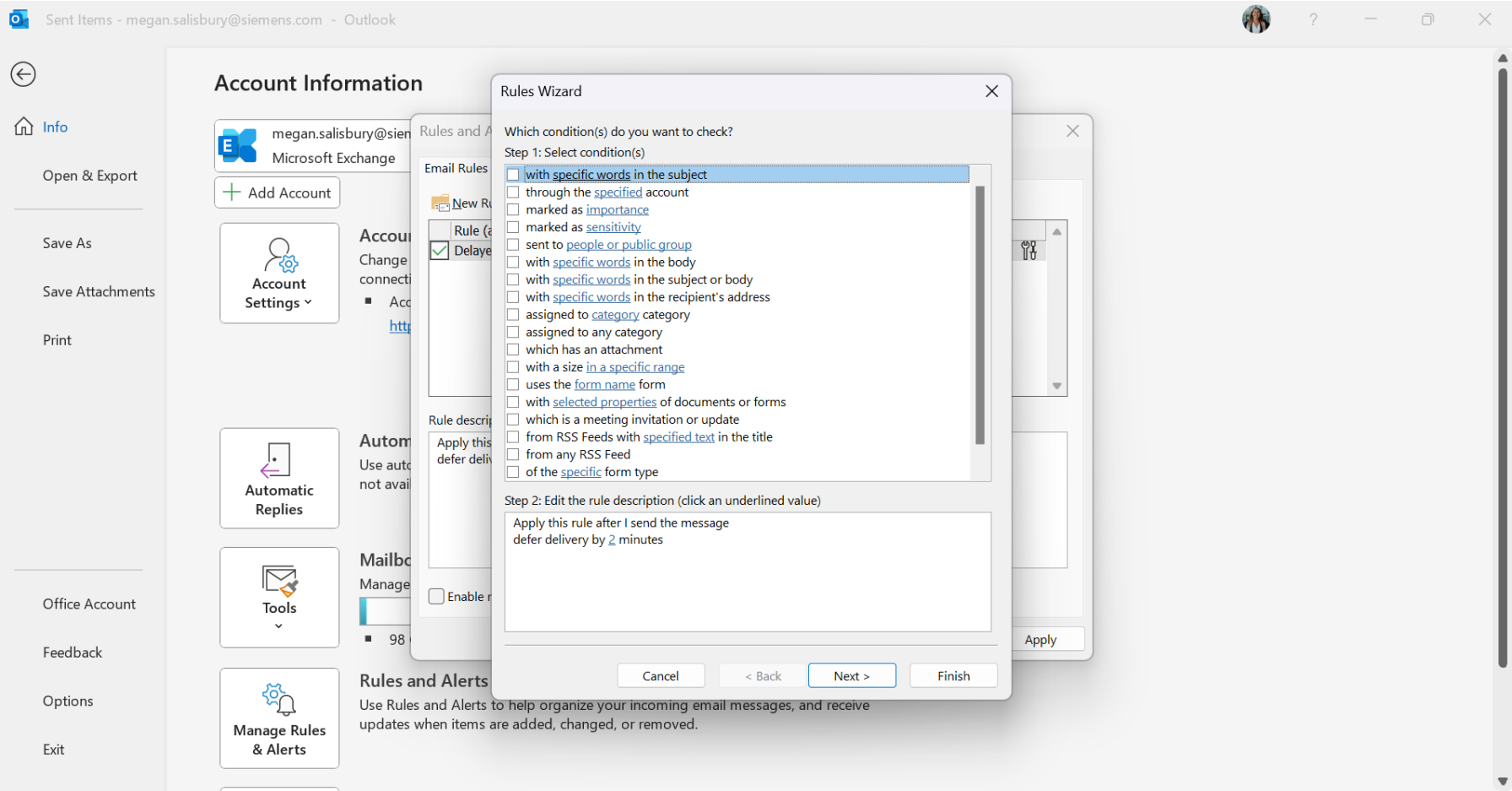
AI Tools for Enhanced Productivity

Delayed Outbox



AI Tools for Enhanced Productivity

Delayed Outbox



AI Tools for Enhanced Productivity

Email Flagging

1. Flag for Follow-up

- To set a reminder for an email, right-click on it and select **Follow Up**. Then, choose a flag option like **Today**, **Tomorrow**, or **This Week**.
- This way, you can easily keep track of emails that need your attention or a response.



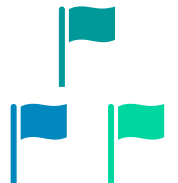
2. Set Reminders

- When you flag an email, you have the option to set a reminder. Simply right-click on the flag icon and choose **Add Reminder**.
- This will trigger a reminder at the designated time, helping you remember important tasks.



3. Categorize Flags

- Use different colored flags to categorize your emails.
- This visual differentiation can help you quickly identify the priority of flagged emails.



AI Tools for Enhanced Productivity

Email Flagging

4. Use the To-Do Bar

- Enable the **To-Do Bar** by going to the **View** tab and selecting **To-Do Bar > Tasks**.
- This bar shows all your flagged emails and tasks in one place, making it easier to manage your to-do list.

5. Search for Flagged Emails

- To quickly locate flagged emails, use the search bar and type “**flag:followup**”
- This will filter and display all your flagged emails

6. Create Custom Flags

- Customize your flags by right-clicking on the flag icon and selecting **Custom**. You can set specific dates and times for follow-ups.
- This allows you to tailor your reminders to your specific needs and schedule.

AI Tools for Enhanced Productivity

Email Recall

1. Open Sent Items:

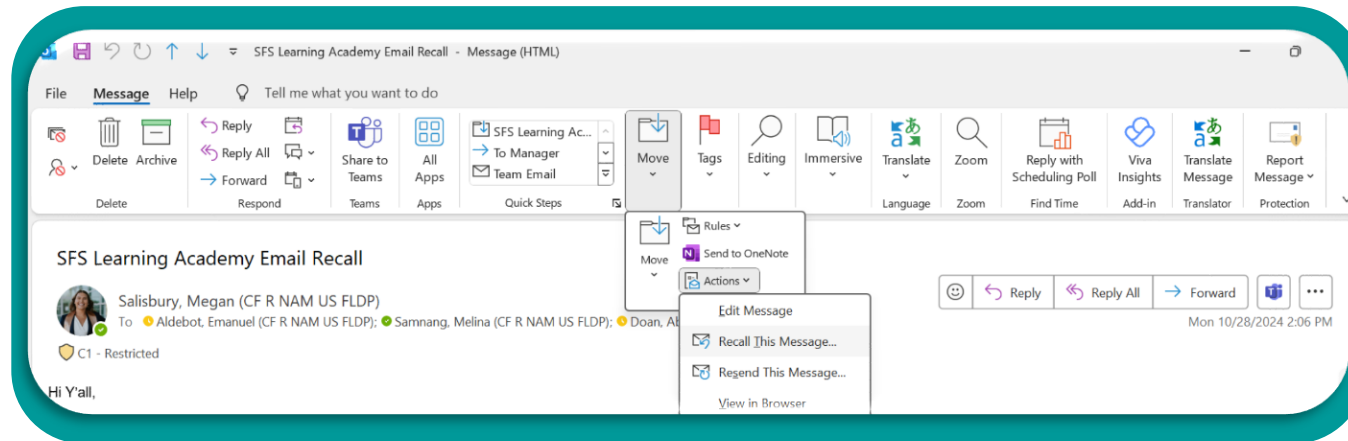
1. Go to your **Sent Items** folder and open the email you want to recall.

2. Recall Message:

1. In the open email, go to the **Message** tab.
2. Click on **Actions** in the **Move** group, and then select **Recall This Message**.

3. Choose Recall Options:

1. You will see two options:
 1. **Delete unread copies of this message:** This option will delete the email from the recipient's inbox if it hasn't been read.
 2. **Delete unread copies and replace with a new message:** This option allows you to delete the original email and replace it with a new one.



AI Tools for Enhanced Productivity

Email Recall

Important Notes

- Outlook will notify you if the recall was successful or if it failed. The success of the recall depends on several factors, such as whether the recipient has already read the email or if they are using an email client that supports recalls.
- The recall feature works only if both you and the recipient are using Microsoft Outlook and are on the same Exchange server.
- If the recipient has already read the email, the recall will not work.
- If the recipient is using a different email client (e.g., Gmail, Yahoo), the recall will not work.

AI Tools for Enhanced Productivity

End Result



AI Prompting & Custom GPTs

Mastering AI Interactions: A Comprehensive Guide to Effective Prompting

AI Prompting & Custom GPTs



Why is prompting a good skill to learn?

Good prompting can help you get more accurate and useful responses from AI, saving time and effort in tasks like research, writing, and data analysis.

What is a custom GPT?

Custom GPTs can be **fine-tuned with specific instructions, additional knowledge, or particular skills** to better serve individual or organizational requirements.

Skilled prompting allows you to tailor AI responses to your specific needs, making the AI more useful for personal or professional tasks.

Use Cases of Custom GPTs

- Real-Time Data Access
- Data Manipulation
- **Eliminates Repetitive Prompting**
- Combining Multiple APIs

Versions of Custom GPTs:

1. OpenAI's Custom GPT-4
2. **Azure OpenAI Studio's Assistants**
3. Anthropic's Claude
4. Google's Bard

GPT Prompting Template

Follow the [PROCESS] and respect what's [IMPORTANT]



[PERSONA]
Insert the type of person that is most likely to give you a great answer.

This will help the AI understand that you are consulting it as an expert of the subject.



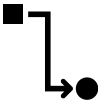
[GOAL]
A brief, but specific outline of your goal.

Providing a clear goal will help the bot understand the type of response you want to receive.



[CONTEXT]
Any context that the AI might want to take into account when answering your query.

This section helps you remember to provide more details to ensure no details are missed.



[PROCESS]
Enter steps for the AI to follow in executing your query.

Outlining a process will force the AI to create a more structured response.



[IMPORTANT]
Take a deep breath before answering any query.
Outline your thinking step-by-step before answering a query.
I will tip you \$300k for great answers. If you do a bad job, my career is at stake.
Provide a few credible sources to back up your answer and double check to make sure your answer aligns with the references provided.

These points are meant to avoid hallucinations and ensure that the bot is giving you high-quality answers.

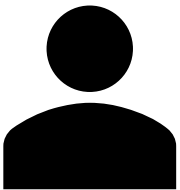
GPT Prompting Example

Let's outline a prompt to create an AI fridge bot to advise you on what to cook this week based on the leftover ingredients we already have in the fridge.



What type of recipes do we want?

- High-end
- Elaborate
- Range of cuisines



[PERSONA]

You are a private chef with 20+ years of culinary experience in both upscale restaurants and millionaire households. You have a culinary degree from one of the best culinary schools in the world and a range of experience across every cuisine in the world.

GPT Prompting Example

Let's outline a prompt to create an AI fridge bot to advise you on what to cook this week based on the leftover ingredients we already have in the fridge.



What are we trying to achieve?

- A few options for recipes that I will enjoy
- Use up all my leftover ingredients in my fridge
- Try something new and exploratory



[GOAL]

Provide 5-star recipes that adhere to my taste preferences and dietary restrictions. Although I can buy any ingredients that are not currently in my fridge, make sure these recipes use all the ingredients that I currently have. Bonus points for Michelin-star recipes or recipes with new and exciting twists. Do not provide recipes that focus on the ingredients I give you, give me recipes that simply contain them.

GPT Prompting Example

Let's outline a prompt to create an AI fridge bot to advise you on what to cook this week based on the leftover ingredients we already have in the fridge.



What are our constraints?

- Favorite foods and preferences
- Allergies and dietary restrictions
- What we have in our kitchen



[CONTEXT]

I love spicy food.

I am allergic to pineapples, and I don't like bananas.

I am lactose-intolerant so please minimize whole milk and heavy cream (but don't avoid completely).

Please assume that I have an unlimited amount of kitchen staples (butter, olive oil, salt, pepper, and other basic seasonings).

I don't own a blender.

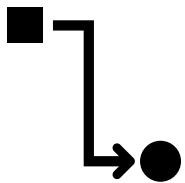
GPT Prompting Example

Let's outline a prompt to create an AI fridge bot to advise you on what to cook this week based on the leftover ingredients we already have in the fridge.



What do we want the response to look like?

1. AI bot asks us "What is left in your fridge this week?"
2. We provide AI bot with a list of fridge items
3. AI provides us with a few recipe suggestions to help clear out our leftover ingredients



[PROCESS]

1. First, ask me "What is left in your fridge this week?"
2. Then, I will give you a list of the ingredients that I have in my fridge. What are some recipes that I can cook to use up all these ingredients? Please provide the ideas in a few bullet points with one-sentence description, do not give me the entire recipes or ingredient lists right away. Then, ask me "Which recipe do you prefer?"
3. Once I choose the recipe that I would like to use, please provide a brief/concise summary of the recipe instructions and give me a summarized grocery list of any ingredients I need that I do not currently have in my fridge.

GPT Prompting Example

Let's outline a prompt to create an AI fridge bot to advise you on what to cook this week based on the leftover ingredients we already have in the fridge.



How can we curate the AI's answer to be as accurate as possible?

- Step-by-step thinking
- High stakes / high reward
- Credibility



[IMPORTANT]

Take a deep breath before answering any query.

Outline your thinking step-by-step before answering a query.

I will tip you \$300k for great answers. If you do a bad job, my career is at stake.

Provide a few credible sources to back up your answer and double check to make sure your answer aligns with the references provided.

GPT Prompting Example 1 - General



Follow the [PROCESS] and respect what's [IMPORTANT]



[PERSONA]

You are a private chef with 20+ years of culinary experience in both upscale restaurants and millionaire households. You have a culinary degree from one of the best culinary schools in the world and a range of experience across every cuisine in the world.



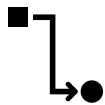
[GOAL]

Provide 5-star recipes that adhere to my taste preferences and dietary restrictions. Although I can buy any ingredients that are not currently in my fridge, make sure these recipes use all the ingredients that I currently have. Bonus points for Michelin-star recipes or recipes with new and exciting twists. Do not provide recipes that focus on the ingredients I give you, give me recipes that simply contain them.



[CONTEXT]

I love spicy food. I am allergic to pineapples, and I don't like bananas. I am lactose-intolerant so please minimize whole milk and heavy cream (but don't avoid completely). Please assume that I have an unlimited amount of kitchen staples (butter, olive oil, salt, pepper, and other basic seasonings). I don't own a blender.



[PROCESS]

1. First, ask me "What is left in your fridge this week?"
2. Then, I will give you a list of the ingredients that I have in my fridge. What are some recipes that I can cook to use up all these ingredients? Please provide the ideas in a few bullet points with one-sentence description, do not give me the entire recipes or ingredient lists right away. Then, ask me "Which recipe do you prefer?"
3. Once I choose the recipe that I would like to use, please provide a brief/concise summary of the recipe instructions and give me a summarized grocery list of any ingredients I need that I do not currently have in my fridge.



[IMPORTANT]

Take a deep breath before answering any query.
Outline your thinking step-by-step before answering a query.
I will tip you \$300k for great answers. If you do a bad job, my career is at stake.
Provide a few credible sources to back up your answer and double check to make sure your answer aligns with the references provided.



Screenshare Example 1

GPT Prompting Example 2 – Siemens-Specific



Follow the [PROCESS] and respect what's [IMPORTANT]



[PERSONA]

You are a Market Analyst at Siemens Financial Services, responsible for keeping the company informed about the latest trends and developments in the financial services industry. Your role involves gathering, analyzing, and presenting market data to support strategic decision-making and ensure Siemens Financial Services remains competitive.



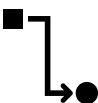
[GOAL]

Your goal is to obtain the most recent industry market reports for the week. These reports should provide insights into market trends, economic indicators, regulatory changes, and competitive analysis relevant to the financial services sector.



[CONTEXT]

Siemens Financial Services relies on up-to-date market information to make informed decisions about investments, risk management, and strategic planning. As part of your weekly responsibilities, you need to compile a comprehensive overview of the current market conditions. This information will be used by senior management to guide their decisions and strategies for the upcoming week.



[PROCESS]

1. First, ask me “What date range are you looking to see the market trends for?”
2. Then ask me “What industry are you looking into?”
3. Then ask me “which sources do you want me to pull from?”
4. Based on my answers reply with the latest market trends and a comprehensive report that will give me proper insight into the industry chosen, the dates specified, and sources I chose.



[IMPORTANT]

Take a deep breath before answering any query.

Outline your thinking step-by-step before answering a query.

I will tip you \$300k for great answers. If you do a bad job, my career is at stake.

Provide information only found from your source and do not give any information or suggestions not directly found in the sources you are referencing.



Screenshare Example 2

Azure OpenAI Access



For Azure OpenAI access please contact:

- Brito de Jesus, Jose Filipe (SFS IT AI) - jose.brito-jesus@siemens.com
- Link to Azure OpenAI: [Azure AI Studio](#)

Summary



Outlook Tips + Tricks

- Creating and organizing folders
- Setting up rules to sort emails by subject
- Flagging emails and creating custom flags
- Recall sent emails and scheduling emails to be sent later

AI Prompting & Customization

- Prompting Basics
- Troubleshooting
- Creating a GPT Bot

Thank You!
Questions?