

Helpful tips for improving productivity in Microsoft Outlook

Also showcasing inMailX, a popular Outlook plugin

31 July 2018

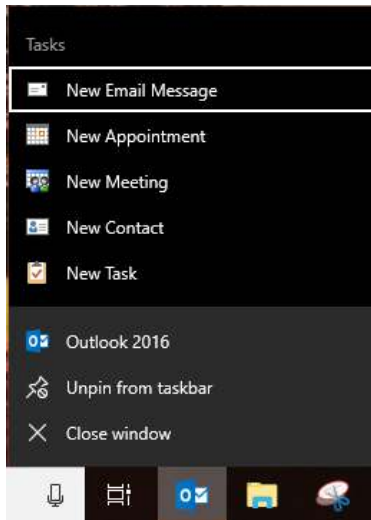
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Outlook Webinar

Jumplist

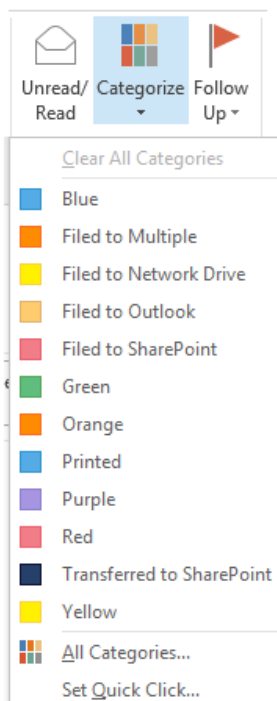
Instantly create new emails and appointments, without having to actually go into Outlook each time.



Right-click on Outlook's icon on the taskbar to open a Jumplist

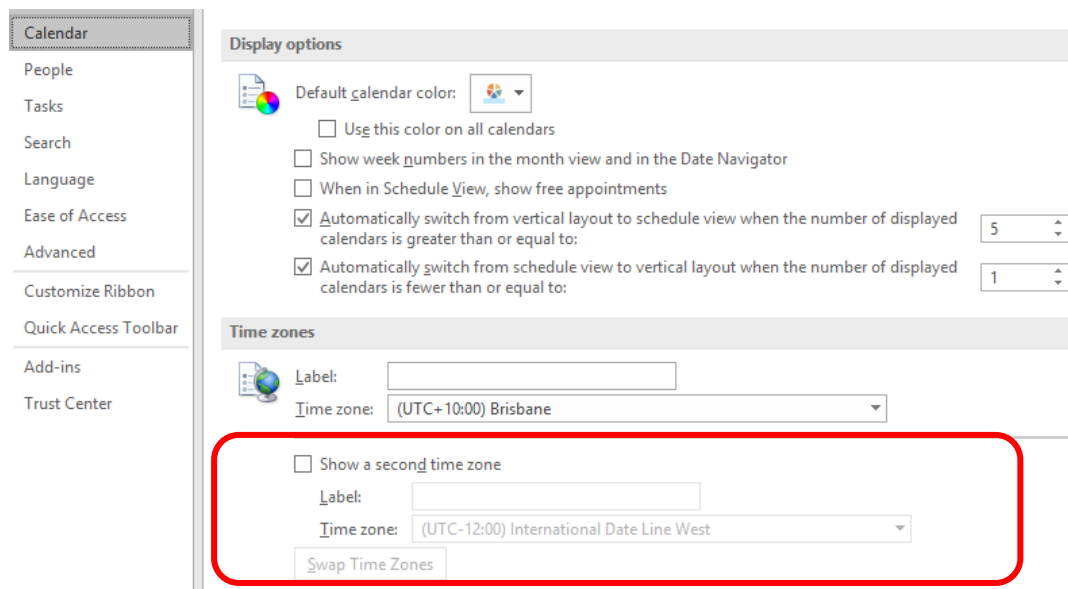
Categorise by Colour

You can categorise your emails by colour. **Home > Tags tag > click on dropdown.** You can rename them to suit your needs.



Time zones

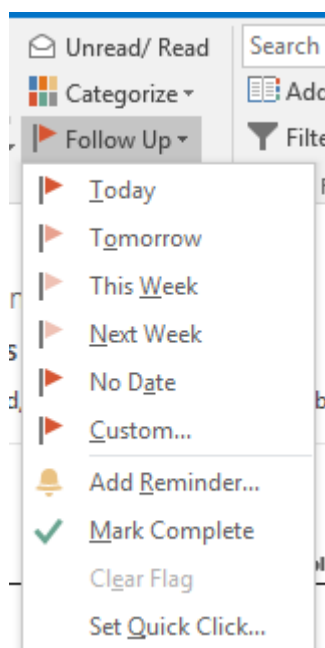
If you travel for work, or if you have colleagues overseas, you may want to show a second time zone. Under **File > Options > Calendar** you'll find the option for setting a second time zone.



You can Click **Swap Time Zones** to easily switch from one location to the other.

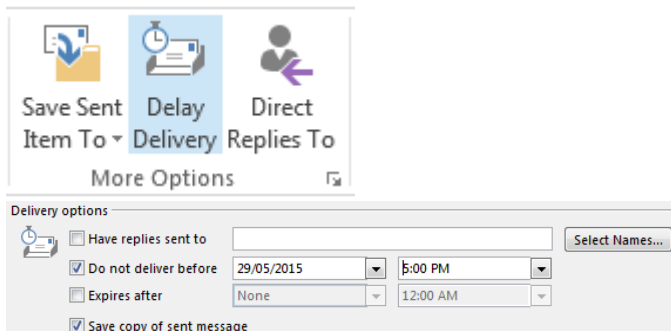
Follow Up Flags

Keeping track of emails using Follow Up Flags. **Home tab > Tags > Follow Up** and Select the drop-down arrow



Delayed sending

If you have an email you don't want to send immediately, you can defer delivery to a specified time. Write your email. Click on the **Options** tab > Select **Delay Delivery**



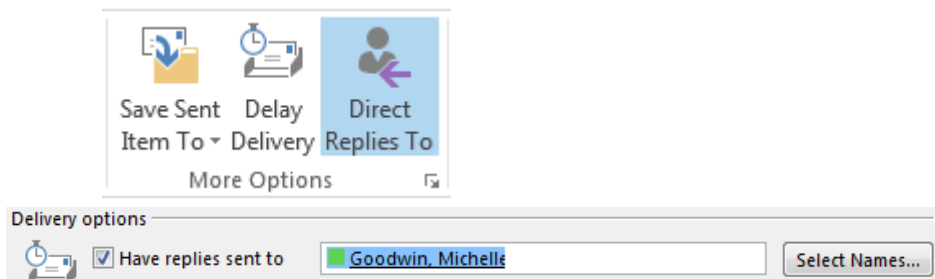
- Enter the date and time > **Close**

The mail will not send until the time specified. It stores it in your Outbox

NOTE : You can close Outlook, and it will still send it as specified. Check your settings with the IT Team, as some organisations disable this ability once Outlook is closed.

Send Replies to

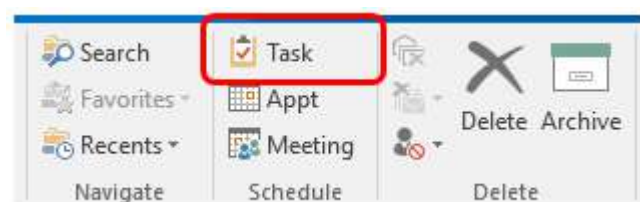
You may wish to divert replies on an email to someone else. Write your email. Click on the **Options** tab > Select **Direct Replies To**



You can enter names here, and it can be more than one name.

Create Tasks from Emails

Sometimes flagging a message is not enough. You can create a task from email. Highlight or open the email. Click **Task** in the Ribbon.



i Due today.

Subject:

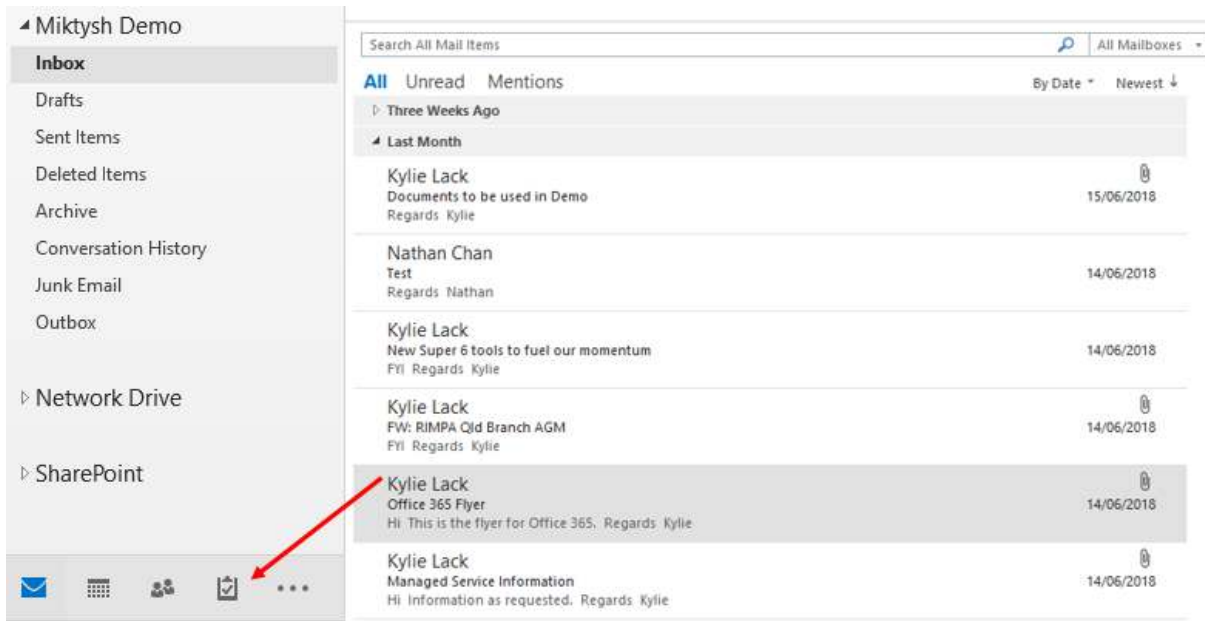
Start date: Status:

Due date: Priority: % Complete:

Reminder: Owner: Michelle Goodwin

OR

Drag and drop the email into the task icon.

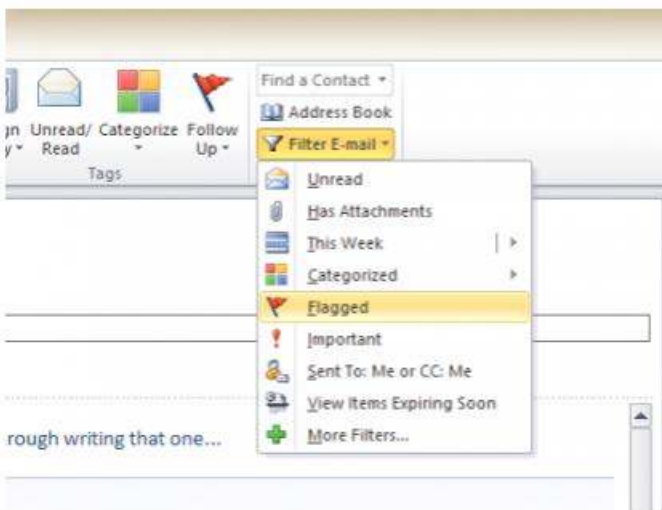


The screenshot shows the Outlook interface with a sidebar on the left containing folders like 'Inbox', 'Drafts', and 'SharePoint'. The main pane displays a list of emails. A red arrow points to the task icon (a calendar icon with a checkmark) in the bottom left corner of the Outlook window.

From	Subject	Date
Kylie Lack	Documents to be used in Demo	15/06/2018
Nathan Chan	Test	14/06/2018
Kylie Lack	New Super 6 tools to fuel our momentum	14/06/2018
Kylie Lack	FW: RIMPA Qld Branch AGM	14/06/2018
Kylie Lack	Office 365 Flyer	14/06/2018
Kylie Lack	Managed Service Information	14/06/2018

Filter

Once you have set up tasks, and categories, you can use the Filter option to screen what is displayed.



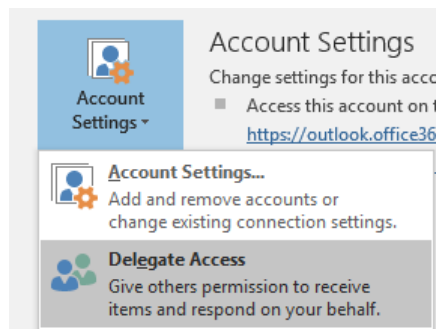
The screenshot shows the Outlook interface with the 'Filter E-mail' dropdown menu open. The menu options are: Unread, Has Attachments, This Week, Categorized, Flagged, Important, Sent To: Me or CC: Me, View Items Expiring Soon, and More Filters...

Delegate access to your mail and calendar

File tab > Account Settings dropdown and select Delegate Access.

Click **Add** and enter the name of the person (or people) to whom you want to grant access.

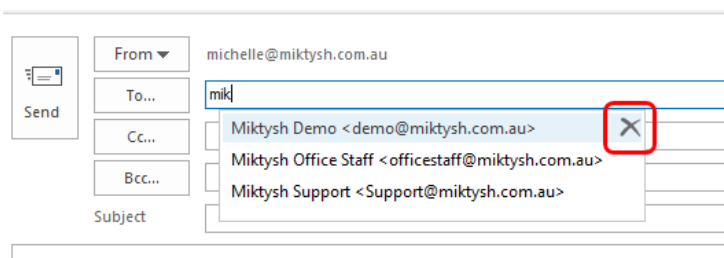
You'll see a set of dropdowns for permissions: by default, your delegate can access and update your calendar and task list, while email and contacts remain private.



Removing email contacts

Don't waste time sorting through 10 addresses or send to someone by mistake.

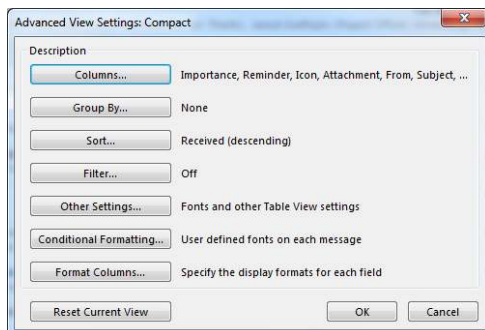
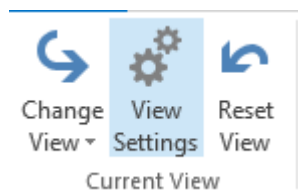
Get rid of the old autocompleted addresses by clicking the **X** in the dropdown window.



Views

You can change the views in Outlook to suit the way you like to work, by adding or removing columns, and even Grouping emails.

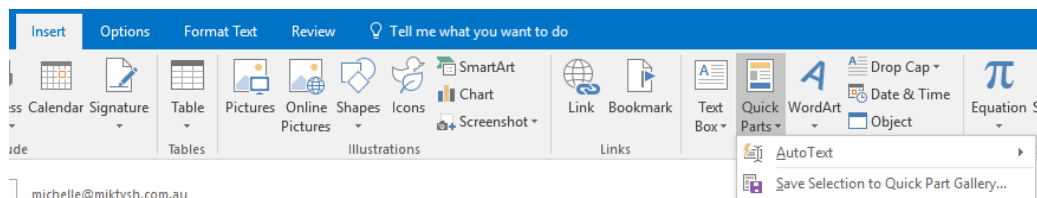
View tab > Select View Settings



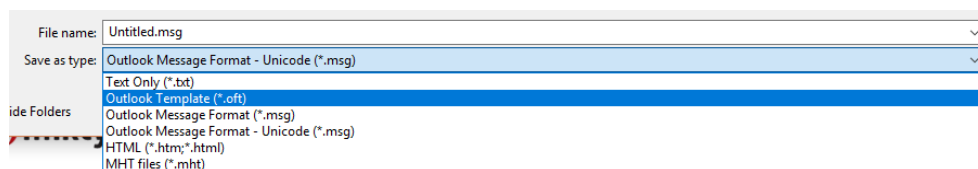
Quick Parts and Templates

If you respond to emails with the same piece of information, you could use Quick Parts to add the information to the email. Create a New email, and type the content into the message window, highlight the content you want to use as Quick Part.

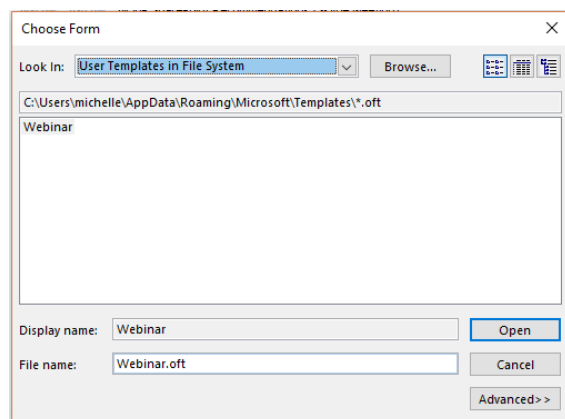
On the **Insert Tab** > select **Quick Parts** > **Save Selection to Quick Part Gallery**



If you send out a weekly or monthly report that has the same basic information with only a few details updated, you could create a Template. Create a New email, select **File > Save As >**. Name your template and remember to select **Outlook Template (*.oft)**.



When you want to use it, go to **New Items > More Items > Choose Form**, and select your template from the **User Templates in the File System** section.



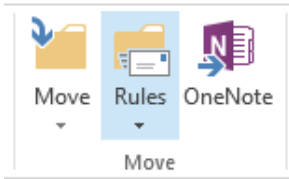
Quick Steps vs Rules

You might wonder why you would use a Quick Step rather than a Rule?

- Quick Steps are flexible so you can choose to apply them when you want to use them
- Rules are less flexible and once they are set up they are applied automatically.

Rules

Rules provide options to automatically handle messages as they arrive.

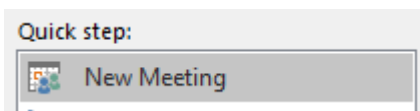


Home > Move tag > Rules

Remember, once a rule is created, it is always applied

Quick Step

An example of a quick step could be New Meeting. Instead of going to Calendar, then selecting New Meeting, you could use a quick step to create the meeting from wherever you are in Outlook.



You can use some Out of the Box Outlook quick steps, and even create your own.

Outlook and OneNote

OneNote's integration into Outlook is awesome. You can take notes on meetings, save emails in OneNote notebooks, and even create flags from OneNote to show up in your Outlook To-Do Bar.

How to Save Emails in OneNote

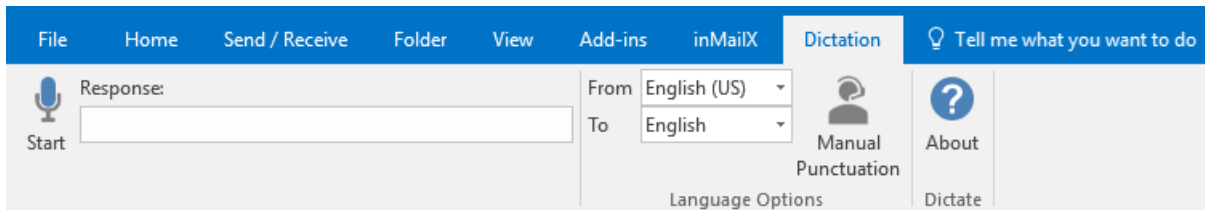
Highlight the email you want to save > click the **OneNote icon** in the Move tag > Save the email



Accessibility

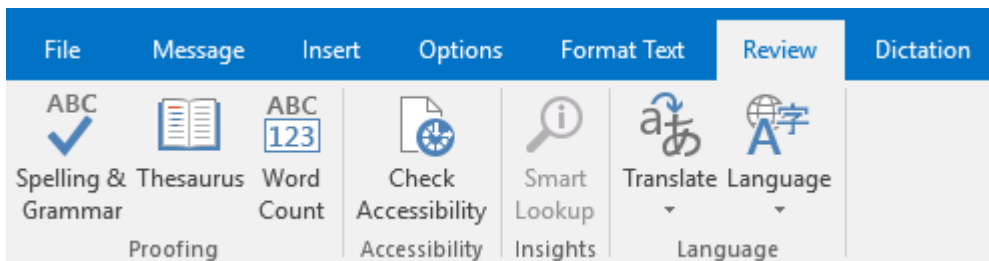
There are ways to help make Outlook more accessible:

Dictation - This works across all of Office too.



Check Accessibility

You can check if your email is accessible to On Screen readers, under the **Review** Tab > **Check Accessibility**



Improving Efficiencies in Outlook with inMailX

Key inMailX Features

Format Email Attachments 'on-the-fly'

- Rename Attachments to personalise file name for recipient, without changing the original name
- Reorder Attachments to set the desired order in which the attachments appear for the recipients
- Convert Attachments to PDF inside Outlook
 - Convert individual attachments
 - Combined multiple attachments into a single PDF – with or without bookmarks
- Clean Metadata to remove confidential information from Word, Excel, PowerPoint, PDF, Image Attachments
- Compress Attachments into ZIP to reduce emails size
- Password Protect PDF & ZIP files to prevent unauthorised access
- Easily undo or redo attachments actions to quickly rectify formatting errors

Simple Email Management

- Streamline the filing of emails and attachments directly into records and document management systems (HPECM, SharePoint, Network & Cloud Repositories)
- Prompt users to file emails on send to improve compliance
- File emails to multiple folders/containers at the same time
- Save attachments separately to single or multiple locations
- Schedule follow up tasks or appointments when filing emails, to ensure that deadlines are not missed

Prevent accidental data breaches and leakage of confidential information

- Recipient and attachments checking (inMailX Send Guard) helps users confirm that emails and attachments are being sent to the right recipients
- Prompt users to clean metadata from email attachments to remove hidden and confidential information
- Prompt users to convert attachments to PDF when being sent externally

Key User Points

- User interface is:
 - Simple
 - Intuitive
 - Efficient
 - Flexible
- Enhance workflows
- Simplify and streamline processes
- Increase productivity
- Enhance email compliance
- Minimal user training requirements
- Make it easier for people to do things
- Reduce the number of Outlook add-ins
- Reduce overheads and running costs

FUN stuff



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