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Technology Track – Session 7

Getting the Most Out of Outlook

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GETTING THE MOST OUT OF OUTLOOK

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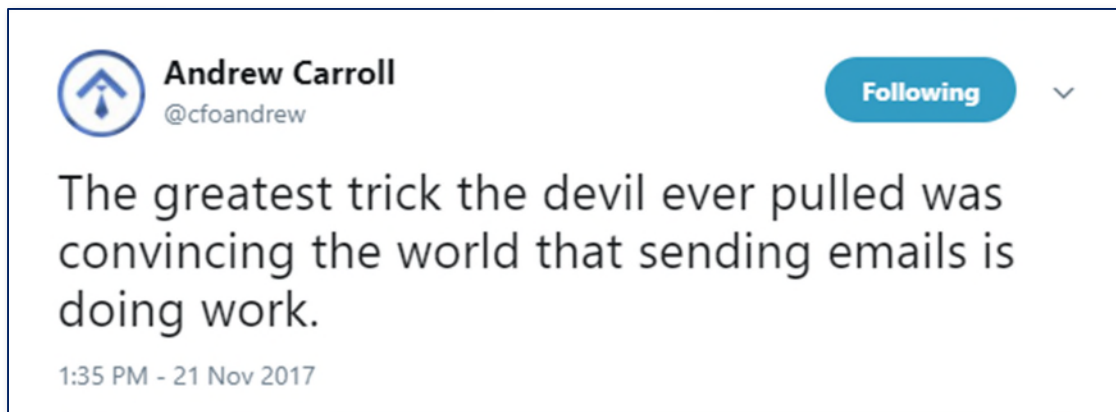
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It's tempting to think of email as a necessary evil. It can be an effective communications tool. However, getting control over it is often an exercise in frustration. Why not make Microsoft Outlook work for you? In this session, you'll learn strategies and techniques for powering through your email, as well as the features, security settings, and add-ins that will bring you closer to that elusive state of email nirvana.

1. Introduction

Email has become ubiquitous. Without question it has provided us with great benefits. The ability to easily communicate with people, virtually instantaneously, from all over the world is a great benefit. Similarly, the ability to easily share documents in the same manner is something that not that long ago would have been impossible.

However, people often confuse email with work. Without question we can get work done in email. However, you should think of email as a tool rather than the actual work product. A tweet from @cfoandrew perfectly illustrates this idea:



When thinking about email, keep in mind that it is a tool. Email should make you more productive. Email should make you more efficient. Email should improve your workflow. Email should improve your communications. However, email should not be your focus. It is not the work. It is one of many tools that allow you to accomplish your work.

Email is generally accessed either through a web-based interface or through an email program or app (often referred to as an "email client") that is installed on your computer or mobile device. Examples of computer email programs include Microsoft Outlook (<http://bit.ly/2AT4Hob>), Mozilla Thunderbird (<https://www.thunderbird.net/en-US>), and MacOS Mail. Email apps include MS Outlook

(<http://bit.ly/2AS9GFG>) , Gmail, and ProtonMail (<https://protonmail.com>). While there are many good email clients for computers and mobile devices, in the business world, Outlook is the predominant product being used.

In these materials, I talk specifically about Outlook as your email client. The purpose of the materials is to allow you to get a better understanding about how the program works and how you can best use it to accomplish your tasks.

2. What's Your Outlook?

As with any other program, specific features in Outlook, or specific menu items vary depending on which version you are using. The examples provided in these materials are based on the most recent version of Outlook available with an Microsoft 365 subscription. If you are using an older version of Outlook, the features described here may be located somewhere else, may be hidden, or may not exist. Further, those of you using Outlook for Mac may notice a difference in the features discussed; Outlook for Mac still lacks some of the features of the Windows version.

3. Email is Not and Should Not Be Free

To state this politely, attorneys are frugal. We understand why. Every dollar that goes out the door is a dollar that does not go into your pocket. If you don't watch where you spend your money, you will quickly end up with none to put in your pocket.

Nevertheless, there are times when you really need to spend money in order to comply with best practices. You are a business. Businesses spend money on mission critical items. Without question, the emails that you use to communicate with your clients, opposing counsel, and the courts are mission critical ego, your email client is a mission critical piece of software for your practice. As such this is something that you should pay for.

In our opinion, you should not be using a free email account for your professional work email account. This means that, if your email ends with @yahoo.com; @gmail.com; @hotmail.com; or something similar, you are placing all of your emails in the hands of a company that can destroy them without notice and without regard to you.

Quite simply, with a free email account, you basically have no rights. With a paid account, you have rights. For those that treat this as a non-issue, we urge you to read the news stories about artist Dennis Cooper. You can find information about Cooper's story at <http://tinyurl.com/hyrlbfn> and <http://tinyurl.com/h3flwqy>. For our purposes, the important part of his story is that Google deactivated his blog (which was hosted for free on Blogger) and his free Gmail account.¹

¹ In the materials below, I examine terms of service from Google. Although obviously not exactly the same, similar differences exist in the terms of services between the free and paid accounts of almost all other services.

After the deactivation, Cooper could not access either. After significant negotiations, Cooper was eventually able to obtain access to his data. However, this cost him significant time and, in likelihood, significant funds. See <http://tinyurl.com/zl454vo>.

When Cooper's blog was deactivated, it had 14 years' worth of information that he had stored nowhere else. Similarly, he lost access to his email that had sent and received via Gmail.

Google's actions here may sound arbitrary. However, they are squarely within the agreement that Cooper, and everyone else who has a free Gmail address, has agreed to. The terms of service, which can be found at <https://www.google.com/intl/en/policies/terms/>, specifically provide: "You can stop using our Services at any time, although we'll be sorry to see you go. **Google may also stop providing Services to you, or add or create new limits to our Services at any time.**" Emphasis added.

Thus, at any time, Google can choose to stop providing services to you. This is obviously not what you want to have happen if the email that Google is controlling access to is email communications with your clients, opposing counsel, and the court.

Before we look at the alternatives, let's first address the reasonableness of Google's position. Google is providing you a free service. Further, given that you are not paying Google any money,² they are giving you essentially no rights to the service. By using the service, you are agreeing to those terms. Are they good terms of you? Absolutely not. However, if you want something different, you shouldn't expect to get that for free.

If you look at the terms of services for Google's paid email, however, you will find that they are quite different. See https://gsuite.google.com/intl/en_in/terms/2013/1/premier_terms.html.

For example, the following terms are found in the paid version. These terms are not available to you in the free version.

1.1 Facilities and Data Transfer. All facilities used to store and process Customer Data will adhere to reasonable security standards no less protective than the security standards at facilities where Google stores and processes its own information of a similar type. Google has implemented at least industry standard systems and procedures to ensure the security and confidentiality of Customer Data, protect against anticipated threats or hazards to the security or integrity of Customer Data and protect against unauthorized access to or use of Customer Data. As part of providing the Services Google may transfer store and process Customer Data in the United States or any other country in which Google or its agents maintain facilities. By using the Services Customer consents to this transfer, processing and storage of Customer Data.

Thus, Google agrees to use reasonable security standards that are based upon "industry standard systems and procedures to ensure the security and confidentiality of Customer Data." In fact, Google

² This, of course, does not mean that Google is not making money off you, but that is a different discussion.

agrees that the security it uses for you is the same it uses for itself for similar type of data. This certainly sounds like something that most attorneys would want a cloud provider to agree to.

3.4 Suspension for Non-Payment.

a. Automatic Suspension. Customer will have thirty days to pay Google delinquent Fees. If Customer does not pay Google delinquent Fees within thirty days, Google will automatically suspend Customer's use of the Services. The duration of this suspension will be until Customer pays Google all outstanding Fees.

We should all pay our bills on time. However, Google at least gives you 30 days to pay up before it discontinues your service.

5. Suspension

5.1 Of End User Accounts by Google. If Google becomes aware of an End User's violation of the Agreement, then Google may specifically request that Customer Suspend the applicable End User Account. If Customer fails to comply with Google's request to Suspend an End User Account, then Google may do so. The duration of any Suspension by Google will be until the applicable End User has cured the breach which caused the Suspension.

If you violate their terms of service, you get the opportunity to handle the problem yourself and the opportunity to cure the breach. With the free service, if Google determines that you have violated the terms of service, Google can disable your account and preclude you from ever accessing it again.

6. Confidential Information.

6.1 Obligations. Each party will: (a) protect the other party's Confidential Information with the same standard of care it uses to protect its own Confidential Information; and (b) not disclose the Confidential Information, except to Affiliates, employees and agents who need to know it and who have agreed in writing to keep it confidential. Each party (and any Affiliates' employees and agents to whom it has disclosed Confidential Information) may use Confidential Information only to exercise rights and fulfill its obligations under this Agreement, while using reasonable care to protect it. Each party is responsible for any actions of its Affiliates' employees and agents in violation of this Section.

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6.3 Required Disclosure. Each party may disclose the other party's Confidential Information when required by law but only after it, if legally permissible: (a) uses commercially reasonable efforts to notify the other party; and (b) gives the other party the chance to challenge the disclosure.

Here both parties agree to keep Confidential Information confidential. That is a good thing. Further, Google agrees that, if it must disclose your information to a third party (such as pursuant to a

subpoena or a warrant), that if it is permitted, Google will provide you with notice of the attempt and give you the opportunity to challenge the disclosure. We can all agree that this sounds like a nice right to have.

10.2 Services Term and Purchases During Services Term. Google will provide the Services to Customer during the Services Term. Unless the parties agree otherwise in writing, End User Accounts purchased during any Services Term will have a prorated term ending on the last day of that Services Term.

An actual term of service. Again, this is great. If you pay Google, they will provide you services until the end of the term. This means that Google can't just stop providing services to you simply because it wants to.

11. Termination.

11.1 Termination for Breach. Either party may suspend performance or terminate this Agreement if: (i) the other party is in material breach of the Agreement and fails to cure that breach within thirty days after receipt of written notice; (ii) the other party ceases its business operations or becomes subject to insolvency proceedings and the proceedings are not dismissed within ninety days; or (iii) the other party is in material breach of this Agreement more than two times notwithstanding any cure of such breaches.

11.2 Effects of Termination. If this Agreement terminates, then: (i) the rights granted by one party to the other will cease immediately (except as set forth in this Section); (ii) Google will provide Customer access to, and the ability to export, the Customer Data for a commercially reasonable period of time at Google's then-current rates for the applicable Services; (iii) after a commercially reasonable period of time, Google will delete Customer Data by removing pointers to it on Google's active servers and overwriting it over time; and (iv) upon request each party will promptly use commercially reasonable efforts to return or destroy all other Confidential Information of the other party. If a Customer on an annual plan terminates the Agreement prior to the conclusion of its annual plan, Google will bill Customer, and Customer is responsible for paying Google, for the remaining unpaid amount of Customer's annual commitment.

If Google believes that you have breached the agreement, you have a 30-day cure period. Further, if your services are terminated, Google agrees to provide you "access to, and the ability to export, the Customer Data for a commercially reasonable period of time at Google's then-current rates for the applicable Services." Thus, even after your service is terminated, you still can access and retrieve your data.

We will not tell you that, even if you pay a provider for service, that you will get terms of service that favor you. However, we can tell you that the free versions give you few or no rights. That is not what you want. You want a paid version that has terms of service that set out the rights and responsibilities of each party to the agreement and at least provide you with some safeguards and obligations on the part of the provider.

4. Flavors of Outlook

In this section we discuss the differing ways in which you can use Outlook (but not the differences between versions i.e., Outlook 2010 vs. Outlook 2019).

Outlook is an email client (software program) that allows you to manage your email. For the most part, Outlook does not care which email provider or email protocol is used to deliver your email: if it can connect to your email account, Outlook is happy to help you with it.

Email is delivered to your Inbox usually in one of the following ways: 1) POP (Post Office Protocol); 2) IMAP (Internet Message Access Protocol); or 3) MAPI (Messaging Application Programming Interface) via Microsoft Exchange Server.³ Let's explain the differences so you can better understand the pros and cons of each one.

POP is a simple, standardized protocol for delivery of email. POP allows you to access your email messages online or download them to your computer via an email client such as Outlook. POP works well for temporary connections (remember dial-up) as you can read, draft and reply to emails while you are offline; then when you re-connect, the emails are downloaded or sent. The downside to POP is that it pre-supposes that you are only using one device or computer to retrieve your email: when you download your email messages using POP, all the emails are downloaded to whatever device you are using, and then are deleted from your email server. This means that by default, you cannot access your emails from another device or online as they have already been deleted from the server once downloaded. Most email providers include an option to leave a copy of the emails on the server, but most users do not know about this until they try to access their emails a second time. POP email is more complicated to backup or archive as well.

Most current email providers (such as Gmail, GoDaddy, InMotion Hosting, etc.), let users decide if they want to use POP or IMAP as the delivery protocol. For modern attorneys, we do not recommend using POP for email but rather use IMAP for the reasons described next.

IMAP accesses email directly from the server using a real time connection. An IMAP email client will create a copy of everything on the server and synchronize it between the email client and the server. Emails are not deleted once downloaded to a device and the emails are kept on the email server as well as the user's device or devices until the user deletes the email. So, if you use Outlook to connect to your email account using IMAP, you can download your email to your computer, iPad and check it via the web interface as the emails all stay on the server until you delete them.

MAPI is a proprietary protocol created by Microsoft that is used to leverage the capabilities of Exchange Server for email and much more. Think of MAPI as IMAP with some other bells and whistles that Microsoft has added, which in conjunction with Exchange allows synching and viewing of folders and subfolders, calendars and contacts across all your devices. Exchange and MAPI extend the

³ Pretty much every commercial email service uses SMTP (Simple Mail Transfer Protocol) to send email messages. That is why you have to designate both the incoming protocol such as POP or IMAP AND the outgoing SMTP protocol when setting up your email client.

capabilities of IMAP and works with Outlook, Outlook Express and even other email clients. Unless you are using hosted MS Exchange, Microsoft 365 or an in-house Exchange server, you will not deal with MAPI.

This leaves essentially two options: Hosted email that uses POP or IMAP such as Gmail, InMotion Hosting, GoDaddy, BlueHost, etc. or Microsoft 365 or on on-premises or hosted Exchange server.

Hosted email works well if you are the only person using it or for small offices that do not want to share calendars and contacts. If you do elect to use hosted email, then you need to ensure that you use IMAP as your email protocol. Outlook will work fine as your email client with this type of email service and most hosting companies provide instructions for how to configure Outlook to access your email from them. Instructions for how to configure Outlook to work with email hosting from InMotion Hosting can be found at <https://www.inmotionhosting.com/support/email/2016> .

With GMail, you can get business class email via the G Suite (<https://gsuite.google.com/>), Google's suite of office programs, shared calendars, and 30GB of storage per user for \$6 per user per month. Most people who use G Suite for email, use the Gmail interface for their email. However, you are not obligated to: you can use Outlook as your email client to access your G Suite email. Instructions for how to do this can be found at <https://support.office.com/en-us/article/Import-Gmail-to-Outlook-20fdb8f2-fed8-4b14-baf0-bf04b9c44bf7>.

If you don't want to use hosted email or G Suite, then you are probably looking at using a hosted Exchange server. A Microsoft Exchange Server is software that sits on a server, it hosts your email, calendar, contacts, and tasks, and allows you to share any or all of those within your organization, as you wish. This is what most people think of when they think of corporate email.

The problem with having an Exchange server is that you have to buy the server, maintain the server, buy the software, and maintain the software. This is not an insignificant expense nor is maintain Exchange for the faint of heart. With a hosted Exchange server, however, an expert buys and maintains all of the hardware and software, and then leases you a portion of that to use for your purposes. This makes it a cost-effective way to get the same benefits that large organizations have.

You can get a hosted Exchange server from a bunch of other providers as well. You can also get it from Microsoft via Microsoft 365. If you don't want to do business with Microsoft, an internet search will reveal more possible providers than you even want to consider. You can also purchase Microsoft 365 plans through local providers via Cloud Service Providers (CSP's) who resell and often add other valuable additional services. For a cost example, however, we will use the products offered directly by Microsoft.

Microsoft 365 Business Essentials provides you with a hosted Exchange server plus One Drive for \$5 per user, per month with an annual commitment. Note that you do not get a version of Outlook for your desktop with this subscription plan. If you want Exchange plus all the Microsoft Office applications that you can download and install on your computers and devices, look to Microsoft 365 Business Premium, which costs \$12.50 per user, per month with an annual commitment.

You might also consider adding Azure Rights Management (\$2 per user, per month) to your Microsoft subscription. This gives you the ability to impose and enforce security policies with your emails,

as well as send encrypted emails. More information about Azure Rights Management can be found at <https://products.office.com/en-us/business/microsoft-azure-rights-management>.

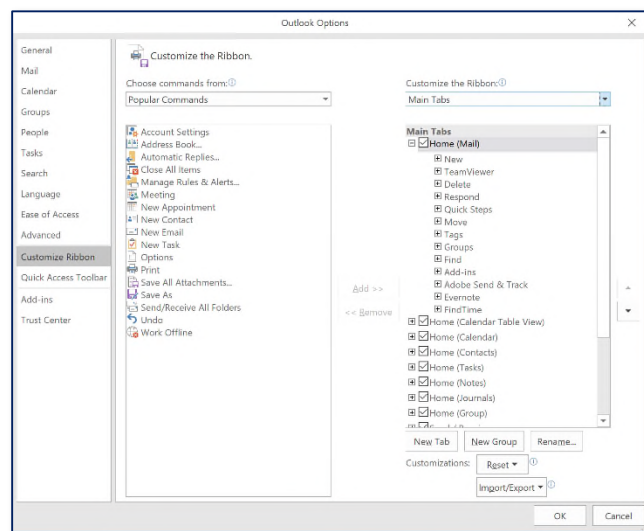
Services from other providers will cost you something similar. For the value provides, the cost from either Microsoft and Google is quite reasonable.

5. Controlling Outlook

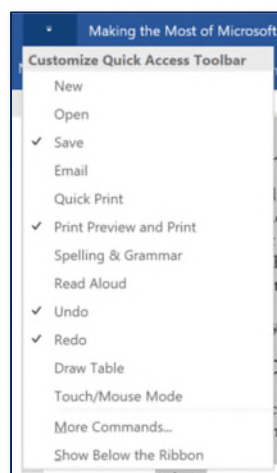
When you first install Outlook, it provides a default set of features, configured in a manner decided by someone at Microsoft who knows nothing about you and how you work. One of the best things about Outlook is that it has dozens of customization features, so you can organize it to work for you in the best manner possible. Below we talk about some of the options available for you to customize Outlook to best suit your workflow.

a. Take Control of the Ribbon and Toolbar

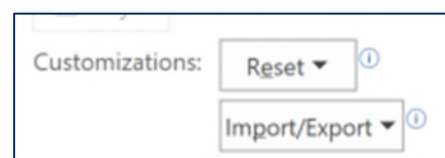
The tools on the Outlook toolbar (called the Ribbon), or any other program for that matter, are not necessarily the tools that you will use the most often. Fortunately, Outlook permits you to customize the toolbar to display only the tools that are most useful to you – or create a Quick Access Toolbar to get to handy commands no matter where you are in the program. To modify the Ribbon, click File > Options > Customize Ribbon. From there you will see all of the commands available to you on each menu of the Outlook Ribbon. On the left side are commands you can add to the ribbon, and on the right are commands that already exist there.



To add or remove a command, simply highlight it and click either the Add or Remove button. You can also add new tabs to the ribbon that will include your own specified set of commands.



The Quick Access Toolbar lies across the very top of the Outlook program and is a great location to place the commands you use most often. Unfortunately, the tools on the toolbar for Outlook, or any other program for that matter, are not necessarily the tools that you will use the most often. The easiest way to modify the toolbar is to click the little arrow at the end of the toolbar and then choose More Commands. From there, you can choose the things that you use most often. You can also control the order that these appear in.



As an aside, you should take the time to customize every program that you use. All Microsoft Office applications can be customized in this same way. Often the items that appear on the toolbar are not particularly useful. Don't let the software companies tell you how to compute. Adjust the software to work the way that you do.

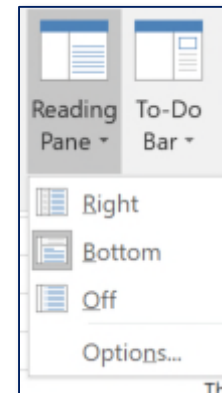
Once you have saved the toolbar the way you want it (by clicking OK), we urge you to export it. Simply return to the same menu and choose Import/Export. Then choose export all customizations. Save this file somewhere that you can access it again in the event that the hard drive on your computer crashes. Cloud storage is a great option for this. This allows you to easily import these same settings into another installation of Outlook

b. Change Your Reading Pane Settings

The reading pane is the portion of your screen in Outlook that allows you to preview a message without actually opening it, and it's an extremely powerful way to triage your email. We do almost all of our email work from within the preview pane. You can change how it appears by clicking View > Reading Pane. You can choose whether you want the pane on the right, or on the bottom. You can also leave the reading pane off, if you wish.

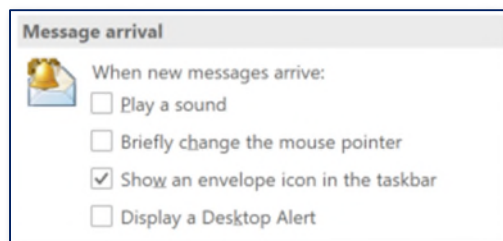
If, from that menu, you click Options, you can choose how and when an email is marked as read. You can also turn on automatic full-screen reading when you are in portrait orientation.

If you do turn off your reading pane, you will likely want to turn on message preview, which will show you 1, 2 or 3 lines of your message. You find this at View > Message Preview.



c. Turn Off Notifications

Microsoft has designed Outlook to immediately draw our attention to the fact that we have received an email and demand a Pavlovian response requiring us to immediately check that email and see what someone had to say to us. This is the worst way to try to get anything accomplished.



Our recommendation is to turn off all 4 of the methods that Microsoft uses to let you know that you have received an email. Yes, 4 different methods. To do this, choose File > Options > Mail. Look in the Message arrive section and uncheck the boxes. This stops Outlook from playing a sound, changing your mouse pointer, displaying a desktop alert, and showing an envelope icon in the taskbar. If you

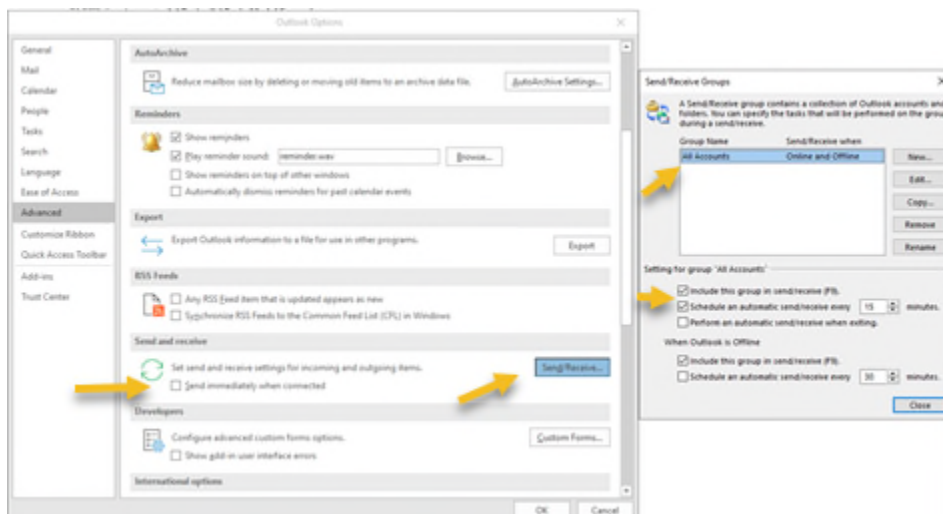
can't find it within yourself to uncheck all 4 of these, you can leave the envelope icon selected. This is relatively unobtrusive and not attention grabbing. However, do make sure that you deselect all of the others.

d. Make It Easy to Send Email

While you are in this panel, scroll on down to Send Messages. Here, Bryan always make sure the box is selected next to CTRL + ENTER sends a message. He uses this feature all of the time. If you don't have this enabled, you can enable it simply by doing it. Outlook will then ask you if you want to turn the feature on.

e. Give yourself an opportunity to prevent the dreaded “Oh No” second

Avoid the “OhNo” second - the shortest period of time between clicking Send and realizing you have the wrong recipient in the To field or another issue with the email. Modify your Outlook settings so that when you use the Send keyboard shortcut above (or when you click the Send button in an email), the email is placed in your Outbox and not sent immediately across the internet. This provides you an opportunity to catch any mistakes before sending the email such as an incorrect recipient which can easily happen especially if you use the Autocomplete feature when selecting the recipient address. In fact, Nerino configures his Outlook so that no email is sent immediately but will either be sent after 15 minutes or when he manually clicks the Send/Receive all folders button. This avoids the dreaded “OhNo” second. To do this Got to File > Options > Advanced Settings. Scroll down to Send and Receive and uncheck the Send Immediately when connected checkbox. Next click the Send/Receive button to the right and in the Send/Receive Groups go to the Settings for group section and check the “Include this group in send/receive(F9).” Then check “Schedule an automatic send/Receive every___ minutes.” and set the time you want such as 15 minutes. Click Close then click OK.



f. Don't Forget Your Attachments

A couple of items below that is “Warn me when I send a message that may be missing an attachment.” I find this feature invaluable and it yells at me regularly. So, check this box.

g. Include a Useful Signature

In this same pane is a section that allows you to create and modify signatures. Click on the signature box to create or edit your signatures. You can create multiple signatures and set your default signatures for both new messages and replies/forwards. You should create a signature here so that your emails have your contact information. This does not have to be elaborate, but you should have something. After all, your firm letterhead contains all of your contact information, right? For an opinion about what should be in your signature, see <http://paperlesschase.com/optimize-email-signature-mobile-devices/>.



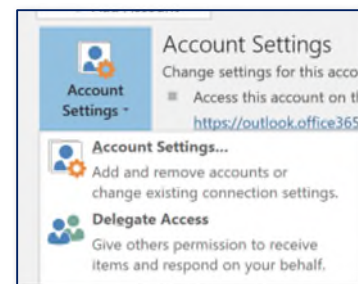
h. Control Your Email with Rules

With Outlook, you should also be aware that you can automatically handle certain emails based on selected criteria. Outlook calls these rules. You find them at File > Manage Rules and Alerts. You can create, review, and edit all of your rules here. However, the easiest way to create a rule, is to identify a email in your inbox as one that needs a rule. Once you do so, right click on the email, choose Rules, and then choose Create Rule.

Once you do this, you have a number of selections that you can use to create and customize your rule. If you need more options, click on the Advanced Options button at the bottom. Select everything that applies and create your rule. By doing this, you are allowing Outlook to automatically route some of your email. This could be personal email, it could be emails from certain people (such as spouses or clients) or it could be from email lists that you belong to. Regardless of what you want automatically handled, there are a number of options available to you to do so.

i. Delegate Access to Your Account

Another feature of Outlook that you can control is delegating access. There are times when it makes sense to allow someone else in your organization to access your calendar, your email, or your contacts. To get started with this select File > Account Settings > Delegate Access.



From here, you can add people as delegates. You can also set permission levels for each of Calendar, Tasks, Inbox, Contacts, and Notes. You can also choose whether the delegate can access the items you have marked as private. For example, you can allow your assistant to have full (Editor) access to your calendar, but have no access to your inbox.

j. Schedule Your Email

You don't have to send a message right when you write it. You can control the time that it is sent.



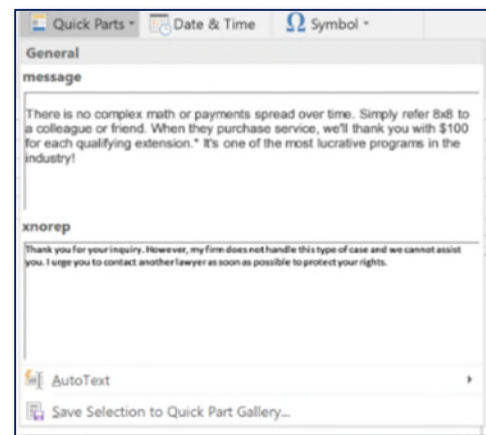
In your message toolbar, click on the Options tab. Then select Delay Delivery. In the Delivery Options section of the box, the box should be checked for "Do not deliver before." After that, you can control the date and the time. Your email will not be sent before that time.

Important: for Delay Delivery to work, your local version of Outlook must be open and running. You can't set Outlook to send the message in the middle of the night, turn off your computer, and expect it to send. Also, some add-ins (see below) may interfere with an unattended delayed delivery, so check them to make sure you don't have problems.

k. Use Quick Parts to Automate Repetitive Emails

The more you can automate your common tasks, the more productive you can be, and Outlook's Quick Parts allow you to set up building blocks of text that can be instantly and easily created to draft or respond to repetitive emails. If you are familiar with Quick Parts in Word, they work the same in Outlook. To set up a Quick Part, open a message and then type the information that you want to save. Then highlight that text, select Insert tab > Quick Parts, and then Save selection to Quick Part Gallery. Then fill in the blanks in the dialog box that appears. Name the Quick Part something descriptive, so you can insert the text just by typing the chosen name.

Once saved you can insert the text by simply typing the name, or by selecting it from the Insert tab. This is a great place to store blocks of text such as directions to your office, or directions to a courthouse. It is also convenient for those "I'm sorry, I can't represent you" emails. The great thing about using quick parts to do this is that you can easily and quickly send out the email, knowing the information is correct, but not having to worry about drafting the email, or going over it in detail to make sure it is correct. Instead, you type a few letters, insert the text, and send it off.



l. Even More Automation with Quick Steps

Another easy way to automate your work in Outlook is to use and create Quick Steps, which are accessible from the Home Ribbon. Quick Steps are simple actions you can take with the click of a button. For example, you can use the Reply and Delete Quick Step to reply to a sender's email, and automatically delete the original message when you press Send on your reply. There are a number of pre-configured Quick Steps, including To Manager (automatically creates an email you can send to your boss – or you can configure this for anyone), Done (marks an email as complete, moves it to a specific folder, and marks it as read), and Team Email (a preconfigured email that includes all of your team's email addresses).

You can also create your own Quick Step by selecting the Manage Quick Steps button. There are some specific starting points – categorize or flag an email and move it to a specific folder, send or forward an email to a specific person, or automatically create a new meeting. If you don't like any of those starting points, you can create your own custom Quick Steps. This is a powerful way to automate some of the activities that take up so much time in Outlook.

m. Drag & Drop Is Your Friend

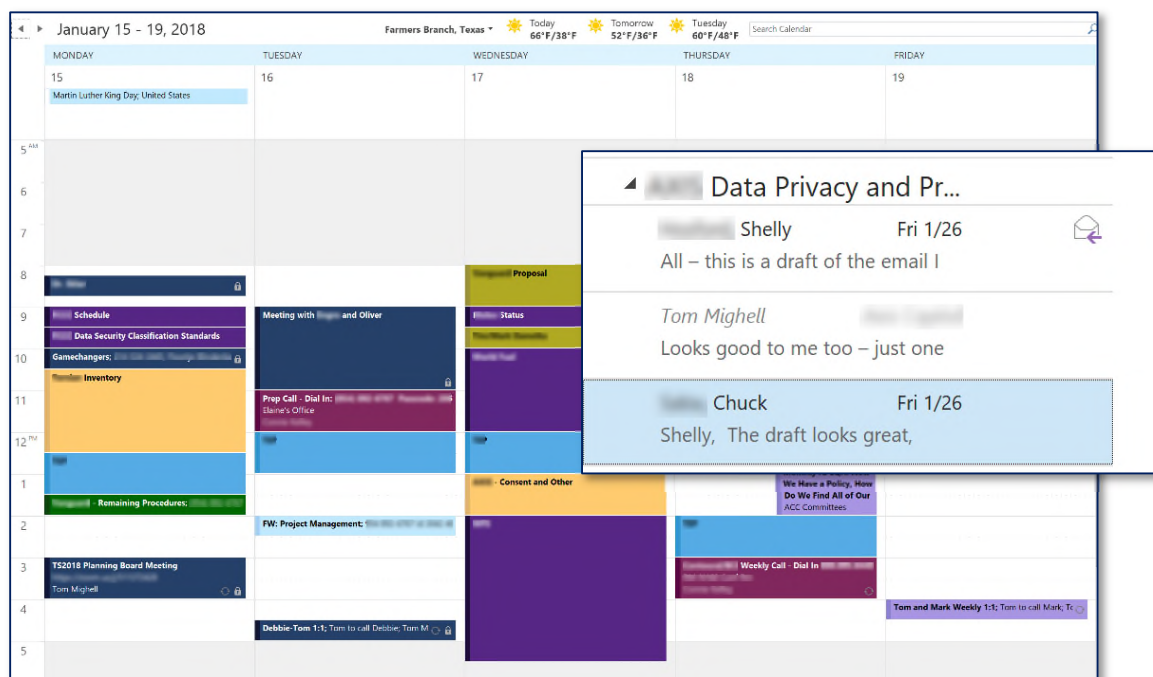
To create a calendar entry from an email that you received, simply grab the email and drag it to the calendar icon at the bottom of your left pane. You can then populate the calendar entry with the information that you need to add. The text of the email will appear in the notes section of the calendar entry.

You can do the same thing with an email that you want to add to your Outlook task list. Again, you can add the information that you want and the text of the email will be included in the to do item.

Similarly, you can do the same thing with contacts. Drag an email to your contacts icon. It will add the name and email address of the sender. This won't fill in the complete contact info. However, it is a great place to start with your contact information.

n. Color Code Your Outlook Items

One of the nice customization features of Outlook is the ability to assign categories to any item – an email, calendar entry, task or contact. You can set up categories for clients, particular types of activities (client development, research, etc.), or other aspects that may be important to your practice. To get started, click on the Categorize button on the Home ribbon, and select All Categories > New. Add the name of your new category, select a color, add a shortcut key if you want to assign a category with just a few keystrokes, and click OK. Once you have them all set up, it is just a matter of a few clicks or keystrokes to assign a category to an email or calendar entry. This categorization can help you pick out emails, appointments or contacts based on their color.



o. Keep Up with the Whole Conversation

It is often difficult to keep track of conversations in email, because not everyone responds to an email at the same time, or even in the order that the conversation plays out. By default, your email

will appear as it is received, so if you receive 5-10 emails over the course of a day that involve the same conversation, they may be scattered and spaced out. By displaying your emails as a continuous conversation, you can keep track of everything in the same place. Just click View and check Show as Conversation. All messages that are part of the same conversation or thread will be grouped together, and they will show up in your folder at the time of the most recent contribution to the conversation. To see the messages in the thread, just click on the arrow next to the message to expand the list. You can turn Conversations on for a single folder, or for all of your email.

The nice thing about Conversations is that Outlook doesn't care where you might have stored part of that conversation – it will display all of them in the same place. For example, if you replied to an email and that message is in your Sent Items folder, it will still display with the entire conversation in your Inbox.

p. Use Focused Inbox to See What's Important

A new feature to Outlook is the Focused Inbox, which separates your Inbox into two tabs: Focused and Other. Outlook learns which emails are most important to you, and places them in your Focused Inbox, while your newsletters and other less important emails are moved to the Other tab. For some lawyers, it makes sense to break up their inbox into two areas, so they can pay attention to the most important messages and tending to the other email when they have time.

Sometimes Outlook misses, and places an important email under your Other tab, or vice versa. This is easy to fix – just right-click on the message and select 1) Move to Focused, 2) Always Move to Focus, 3) Move to Other or 4) Always Move to Other. If the Focused Inbox drives you crazy, you can always turn it off, by selecting the View tab and clicking Show Focused Inbox.

q. Auto CC and BCC emails

While the Outlook Sent files folder works well for keeping copies of all sent emails, perhaps you want to create a different search folder, backup sent emails to another account or copy an assistant or someone else on your sent emails. You can easily do this using Rules. Lifewrie.com has a good tutorial on how to do this at <http://bit.ly/35pmeT6>

r. Create a folder for regular used searches

While you can search the folder you are currently in or all folders from the Inbox, if you find yourself searching for the same email such as from a specific person or topic, create a Search Folder. Go to Folder > New Search Folder and then select from one of the available templates or create your own.

s. Advanced View Settings

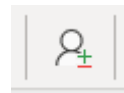
Believe it or not, we have only scratched the surface when it comes to customizing the way you use Outlook. There are potentially hundreds of other customizations available when you click View and then View Settings. There you will be able to customize columns, group, sort or filter messages in a number of different ways, and modify your fonts or how tables are viewed, among many others.

One very useful customization in the Advanced View Settings is Conditional Formatting, which allows you to designate specific fonts and colors for particular messages. There are a number of default rules, including unread messages, unread group headers, submitted but not sent messages, expired email, overdue email, and messages in other folders. But you can create your own rules as well. As an example, let's create a rule so you can tell when you receive important emails from your big new client, ACME Industries.

In the Conditional Formatting dialog box, click Add to add a new rule; highlight it and type ACME Industries in the Name: box. First, press Font to specify the font and color for emails that come from ACME – let's select red, so those emails will stand out in your Inbox. Next, press Condition, where you will see you have Outlook look for emails under several different criteria, including emails with particular keywords, From or To specific individuals, items that have attachments, and messages with high importance. In this case, we just want to flag emails that come from the General Counsel at ACME. Under the Messages tab, type the General Counsel's email address, and click OK, then OK again. From now on, emails from the ACME GC will appear in red, so they will be easy to see.

t. Turn Off Teams Meetings in Outlook Invitations

Outlook invitations are a great way to schedule a meeting and making sure that it appears on the calendars of others. You do this by creating an appointment and clicking the person's head. This adds two fields to your appointment: Required and Optional. You can enter emails into these field. This will email each of the people you name and allow them to accept or decline the invitation for the meeting.



Required
Optional

This is a very useful tool that I have been using for years. Post-COVID, Microsoft made this feature annoying by scheduling a Teams meeting for every meeting that was scheduled. This is annoying and frustrating. Fortunately, you can easily disable this “feature.”

Select File > Options > Calendar. In Calendar Options there is a selection for “Add online meeting to all meetings.” Click the box at the end and deselect “Add online meeting to all meetings.” Also, if you want your meetings to be online and you have that provider integrated with Outlook, you can select that meeting provider. For example, the Zoom plug-in provides you with the option to automatically schedule these meetings as Zoom meetings.

6. Outlook Web Access

If you have Microsoft 365, or even a different hosted exchange server, don't forget that you can access your email from any web browser. If you are using Microsoft 365, simply login to your account and select mail. This will take you to your email and you can send and receive your email, as you wish.

7. Integration with Microsoft 365

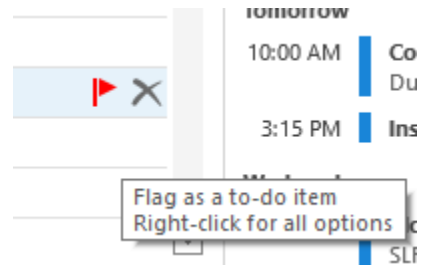
If you have Microsoft 365, you know that there are a number of other applications that you have access to that you in addition to Word, Excel, Outlook, etc. One of these applications is Microsoft To

Do. This is a To Do list. Basically, Microsoft purchased a popular to do program (Wunderlist) and then ported the program to its own system and renamed it Microsoft To Do.

If you are looking for a to do solution, you should check out Microsoft To Do.

Unsurprisingly Microsoft has added tight integration between Outlook and To Do. When in Outlook, if you want to add an email to your To Do task list, simply click the flag at the end of the email. When you do this, Outlook automatically adds the email to To Do

as a task. The task then appears in To Do under the Flagged Email task grouping.



8. Outlook Add-Ins

Despite Outlook's many features, it cannot do everything. Fortunately, there are many add-ins and connectors that work from within Outlook to improve your experience and productivity. Some of our favorites are detailed below.

SimplyFile (<http://www.techhit.com/>) addresses an age-old problem Outlook has not been able to properly solve: how to automatically file emails you send in the right folder? SimplyFile learns your email habits and provides suggestions for how you should file messages. If you are using Outlook to store your client emails (rather than a practice management solution) then SimplyFile can help you with this. SimplyFile also keeps track of how often you use it, as well as when you use it most often. A single license costs \$50.

If you don't like filing your emails in folders, you can tag them with **SimplyTag**. Instead of filing your emails, you tag them with information that makes them easier to find. Also made by TechHit, SimplyTag is also \$50.

TechHit makes a number of other products that integrate with Outlook. Probably the most useful are **MessageSave**, **EZDetach**, and **SendAware**. MessageSave provides an easy way to save, backup, and archive emails outside of Outlook. Depending on the features you want, MessageSave costs \$80, 120, or \$180.

EZDetach allows you to reduce the size of your mailbox by automatically removing attachments from emails. The program also stores the detached file, so you can easily reattach it to the email if necessary. EZDetach is \$60.

SendAware is designed to minimize the risk that you will send an email to the wrong person. It cannot completely remove user error, but it can help. SendAware comes in three versions with different functions, costing \$60, \$100, or \$150.

Microsoft 365 Add-Ins and Connectors. With the advent of Microsoft 365, you can now select from hundreds of add-ins and connectors, from directly within Outlook. Some of these add-ins will require subscriptions with other services (see below for examples), but what is nice is that you are not downloading standalone software from a third-party provider – the software installs from Microsoft,

and integrates directly into Outlook. To view the available add-ins and connectors, just click on the Store button on the Home ribbon.

A cool Add-In is FindTime, a terrific add-in for scheduling meetings with others. You call up FindTime within the body of an email – FindTime connects to your calendar, and shows you times that you are available. Select a few dates/times, enter details about your meeting, and click OK – FindTime embeds a link into your email, which your attendees use to indicate their availability. Once everyone has responded and FindTime finds a common time for everyone to meet, it automatically schedules the meeting in your calendar and sends an invite out to your attendees.

Here are just a few examples of the great add-ins you can find in the Microsoft 365 App Store:

- DocuSign for Outlook – sign documents or get documents signed from within Outlook. There are many other electronic signature add-ins available, including Adobe Sign.
- ShareFile – add documents to an email message directly from your Citrix ShareFile account. There's also an add-in for those of you who use Dropbox.
- PayPal – securely send money to others using just an email.
- Salesforce Lightning – access and use Salesforce from within Outlook.
- Uber – get reminders when it's time to request your Uber ride.
- LawToolbox365 – receive court deadlines directly into your Outlook calendar
- Zoom – Allows you to schedule Zoom meetings from Outlook

The Connectors store will also connect you to services you may already use, including Trello, and Twitter. But you can also use services like IFTTT (www.ifttt.com), Zapier (www.zapier.com) to connect various services with Microsoft 365. Even better, check out Microsoft Flow (<https://flow.microsoft.com>). Here's just a short list of the tools that will connect with Microsoft 365, through one or more of the above services:

- Adobe Creative Cloud
- Adobe Sign
- Asana
- Basecamp
- Bitly
- Box
- Buffer
- Calendly
- DocuSign
- Dropbox
- Facebook
- Gmail
- Google Calendar
- Google Contacts

- Google Drive
- GoToMeeting
- LinkedIn
- Salesforce
- Slack
- SurveyMonkey
- Todoist
- Trello
- Twitter

9. Tips and Tricks.

In this section, I discuss some tips for getting the most out of Outlook.

Ignore Reply-All Conversations. If you're like me, you likely do not like being trapped in a email chain where everyone keeps hitting Reply All when you don't need to be a part of the conversation. Outlook can quickly take you out of that conversation. Just press the Ignore button, or right click on one of the messages and select Ignore. All future emails in this conversation will be sent to the Deleted Items folder. Be sure you really want to do this, however; if there's a chance someone might say something useful in a later email, you might need to endure the onslaught of pointless messages.

Outlook is Great on Your Phone, Too. Have you tried the Outlook app? It's available for both iOS and Android, and it offers many great Outlook features in a convenient mobile format. Even better, the Outlook app offers features you can't get on the desktop or web. One helpful feature that most mobile email apps use is the "swipe left or right" option for reviewing your email. In Outlook, you can customize your swipes to do a number of things: Delete, Archive, Mark read, Move to folder, Flag, Schedule, or Read and archive your email message. For example, you can use "swipe right" to mark emails as Read, and "swipe left" to delete them. With the swipe feature, you can triage a full inbox in seconds.

The Outlook Mobile app also gives you access to your Calendar, Files, and Contacts. You can connect multiple email accounts, and view all your emails via a Unified Inbox or separately by account. You can also connect your OneDrive, Dropbox, or Box account, so you can access files on your smartphone. You can directly RSVP to meetings within the Calendar, as well as set reminder alerts, show your time as busy or open, and mark certain appointments as private.

There are many great mobile apps for managing your email, but I believe the Outlook app is every bit as good as the others, and it integrates directly into your Microsoft 365 account—which makes it a natural choice.

Create Search Folders for Regular Searches. Do you often have the need to run the same search within Outlook? Don't waste time creating a new search each time – create a Search Folder instead. To get started, look at the bottom of your email folders, where you should find a folder called Search Folders. Right-click on it and select New Search Folder. You next select a context for your search – do you want to use a search to:

- Read Mail (look for unread mail, find mail flagged for follow-up, or important mail),
- Find mail from People and Lists (find email to and from specific people or groups),
- Find mail based on how it's organized (by categorization, size, age, attachments, or by keyword)
- Create a Custom Search.

Create your search, and Outlook will create a folder under Search Folders – each time you visit that folder, Outlook will re-run your search and bring you the most current results.

Be Smarter about Smart Lookup. Did you know that Outlook (and other Microsoft 365 apps) has its own Research tool? For example, let's say you're emailing someone about a local courthouse, and want to provide more information about it. Just type the name of the courthouse, highlight it, right-click and select Smart Lookup. Outlook will bring up a research pane on the right, with search results provided by Bing. You can also use Smart Lookup to define words.

Getting Someone's Attention. Want to call someone out in an email to get their attention? Just enter the @ symbol in the body of an email message. Outlook will display a dialog box with suggested contacts. Choose the name, and it will be inserted into the email (for example, @Bryan Sims). When you do this, Microsoft 365 will automatically add that person's email address to the To: line of the message, and highlight their name in the message body or invite details. You can also use the @mentions feature to search for emails in which you were mentioned. Above your message list, choose All > Mentioned Mail.

Take a Quick Peek. You can see into other parts of Outlook from whichever screen you're using, by using the Quick Peek feature. Just hover your mouse over the Calendar, People, or Tasks buttons in the lower-right of the application. Here's what you'll see:

Include Your Favorite People. You can also add regular contacts as Favorites to the Quick Peek window, to make sending them an email quick and easy. When you search for a contact you want to include as a Favorite, right-click on the contact and select Add to Favorites. Now when you do a Quick Peek, your Favorites will be right there – with just a few clicks you can create an email to them. You'll also notice that if you are all in the same organization, you can see their current availability for a meeting or call.

Sharing Your Calendar via Email. If you're not a solo lawyer, chances are you may need to view your colleague's calendars from time to time. Outlook makes this pretty easy. In the Calendar pane, press Share Calendar, and an email pops up. Enter the email address of the person you want to share with, check Request Permission to view recipients Calendar if you want to view their calendar too, leave Allow recipient to view your Calendar, and then select the level of detail you want them to be able to see: Availability Only, Limited Details, or Full Details. Click Send, and once the recipient accepts the request, you should be able to see his or her calendar in your own Outlook calendar.

Sharing Calendars only works when you are all on the same Microsoft 365 account, or all use the same instance of Exchange. However, you can still share your calendar by email with people outside your firm. Click the E-mail Calendar button, and an email with a dialog box appears. You can choose

the Date Range you want to send; you can choose Specify Dates, and then select the individual dates he wants to send. You can also specify how much detail you provide when you share your calendar, from Full Details to Availability Only. Once you make these decisions, click the OK button, and your calendar will be inserted into the email. This is a great way to share availability with others rather than taking the time to write an email that says “I am available Thursday between 10-11, 1:30-3:30 and 4:00-5:00.”

Show a Second Time Zone. If you are working in multiple time zones, or have clients in different time zones from your own, it can often be confusing to keep track of the right times within Outlook. If this is the case, you can configure your Outlook Calendar to show two different time zones. Just place your mouse anywhere in the time bar on the left, right-click and select Change Time Zone. In the dialog box that appears, check Show a second time zone, select the additional time zone you want to see, and add a label to it if you want. Now you should be able to see the time where you are, and the time in the other time zone. You can switch the order of these time zones by pressing Swap Time Zones.

The Power of Search. There are multiple ways to search your email in Outlook, from the very fast to the very powerful. The fastest way to search is to use the Instant Search box, which sits at the top of your current folder. Just begin to type your search terms, and results immediately begin to appear. You can search your current folder, other subfolders, current mailbox, or all mailboxes.

For a more thorough search experience, click in Search Current Mailbox and the Search tab appears. Take a look at this tab first – you can refine your search here by specifying recipients, attachments, categorizations, and other customizations. But for now, click on Search Tools > Advance Find, and a small dialog box will appear. Your options here are much the same as when you created a Search Folder, above. You can search across all of your Outlook items – email, calendar items, contacts and tasks. You can customize your search by keyword, recipient, and how the message is categorized. You can also create incredibly complex searches that will look at virtually every field that exists within Outlook.

The good news about Outlook’s search functionality is that it offers something for everyone. You can do a fast search, or you can do a slower complicated search.

Using OneNote with Outlook. Although this is really a OneNote tip, it uses Outlook to work. When you create a note page in OneNote, click the Meeting Details button. OneNote displays your calendar for the current day. Select the meeting for which you are going to take notes, and OneNote will insert all of your Outlook meeting details into the note – the time, dial-in information, and the names of all the attendees. It’s a great way to capture important information about your meeting.

10. Conclusion

These materials have just scratched the surface of possible things that you can do in Outlook. If you use Outlook as your email, calendar, or contact management, you will greatly benefit from learning the options available to you to make Outlook work for you.