

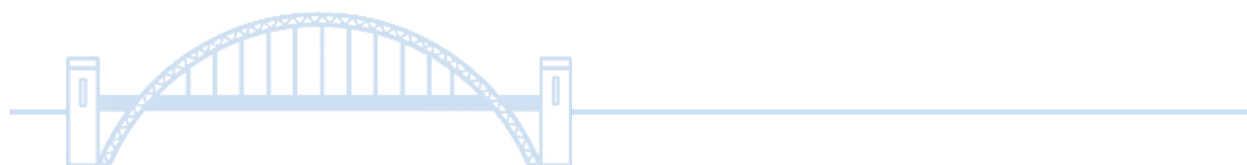


The Newcastle upon Tyne Hospitals

NHS Foundation Trust

Outlook on the web

Productivity & Automation



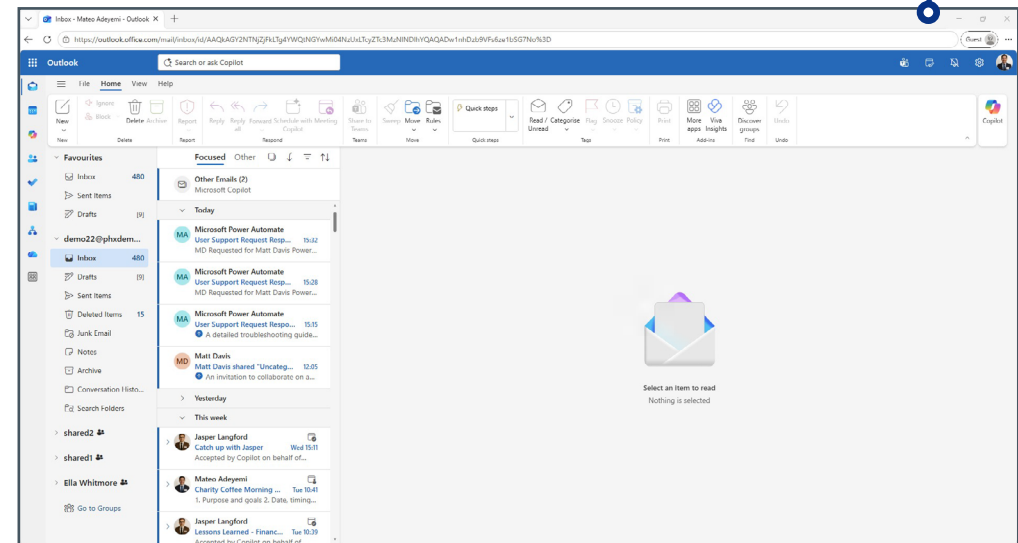
Introduction

This guide is designed to help you manage your Outlook inbox more confidently using tools that are already available in Outlook on the web. You do not need to use every feature straight away. Start with one or two options that solve a real problem for you, such as keeping important messages visible, turning emails into tasks, or moving regular updates out of your main inbox.

How to access Outlook on the Web

- 1 To access Outlook on the Web, you will need to open a web browser such as Microsoft Edge. You can open Edge by selecting the **Start** button at the bottom of the screen and typing “Edge” into the Search bar.
- 2 When you open Microsoft Edge, enter the following web address into the address bar at the top of the screen and press Enter: <https://outlook.office.com/mail/>
- 3 You may then be prompted to sign in using your M365 credentials.

Once signed in, your Outlook application should look similar to this.



Using My Day

Before using My Day, it helps to understand where it fits. Outlook on the web is mainly used for email and calendar work. My Day is a side panel that lets you quickly check your calendar and tasks without leaving your inbox, so you can stay focused while still seeing what needs your attention.

What My Day is

My Day consolidates calendar commitments and task management into a single side panel, enabling users to maintain productivity in Outlook while staying informed about upcoming priorities. The My Day panel provides two primary tabs: **Calendar** and **To Do**.

View upcoming meetings

- 1 Select the My Day icon at the top of Outlook on the Web.
- 2 Choose the Calendar tab to view upcoming events for the selected date.
- 3 Select an event to view more details or open the full event when required.
- 4 Use the view options to switch between agenda and day view where available.

Join meetings without switching into Teams

Users can join a Teams meeting directly from the Calendar view in My Day. This reduces the need to change from Mail into the Teams calendar.

Use My Day with tasks and Calendar

You can create a task due for the current day in the Calendar tab, simply by clicking 'Add a task due today', typing in the title and pressing enter.

The screenshot shows the Outlook My Day side panel. At the top, there's a navigation bar with icons for Mail, My Day (highlighted), and a profile picture. Below this, the 'Calendar' tab is selected, showing a calendar for August. A callout points to the My Day icon in the top bar, stating 'Select the My Day icon to open the My Day side panel.' Another callout points to the 'Calendar' and 'To Do' tabs, stating 'Change between Calendar and To Do.' Below the calendar, there's a section for 'Today • Thu, 13 Aug' with a '+ Add a task due today' button. A callout points to this button, stating 'Add a task due today.' Below this, a meeting titled 'Charity Coffee Mornin...' is shown with options to 'Prepare for this meeting' and 'Chat with participants'. The panel also shows 'Tomorrow • Fri, 14 Aug' and 'Mon, 17 Aug' with their respective meetings.

Working with Microsoft To Do

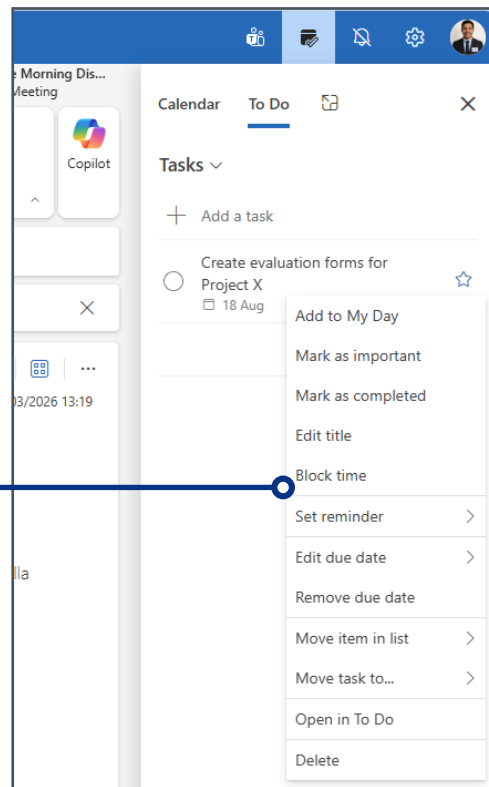
Microsoft To Do works within Outlook and helps you stay organised and focused. Whether you are managing personal tasks or work projects, To-Do allows you to create tasks, set reminders and prioritise what matters most to you.

In Outlook on the Web, tasks can be managed through **My Day** by selecting the **To Do** tab. This can help you as you may need to manage both tasks and your calendar in one place.

Once created, you can then adjust task settings including:

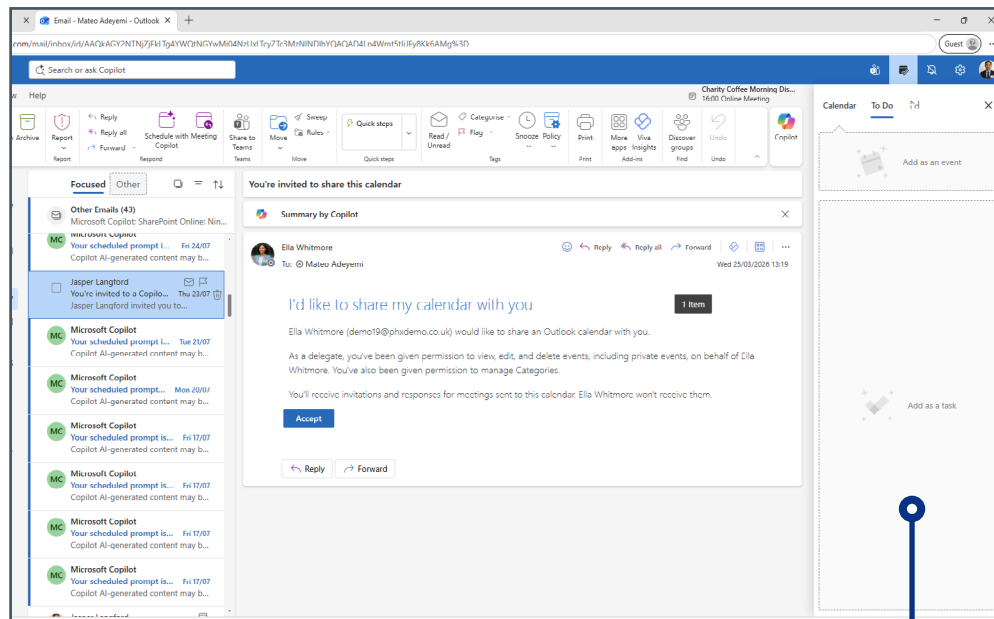
- ✓ Set Due Dates
- ✓ Mark as Important
- ✓ Set Reminders
- ✓ Block time in your calendar to work on that task

Right click on the task to adjust settings.

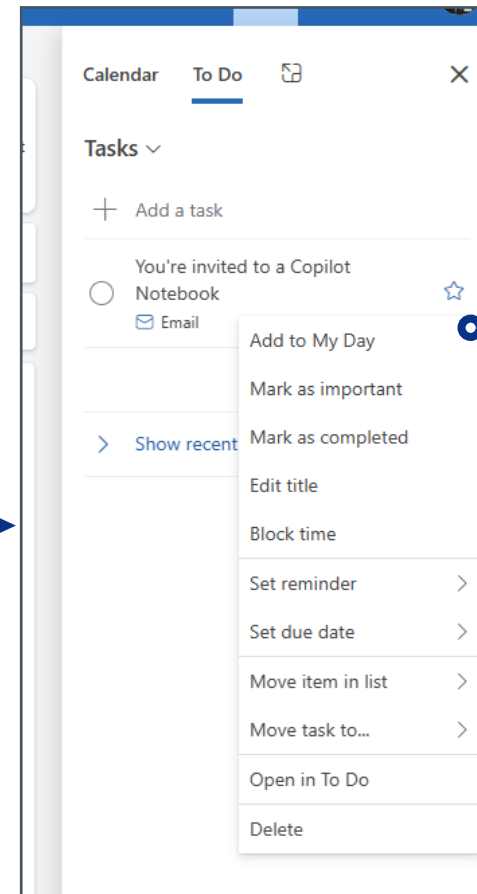


Turning Emails into Tasks

If you receive an email and it includes an action or task for you to complete, users can convert that action into a task by dragging the email from the inbox over to the To Do panel:



Drag an email from the Inbox into the 'Add a task' area in the To Do panel.



The email is now added to Tasks. Right click to add further details.

Where additional details are required, open the task in To Do and add the relevant due date, reminder or to Delete.

Creating and Managing Rules

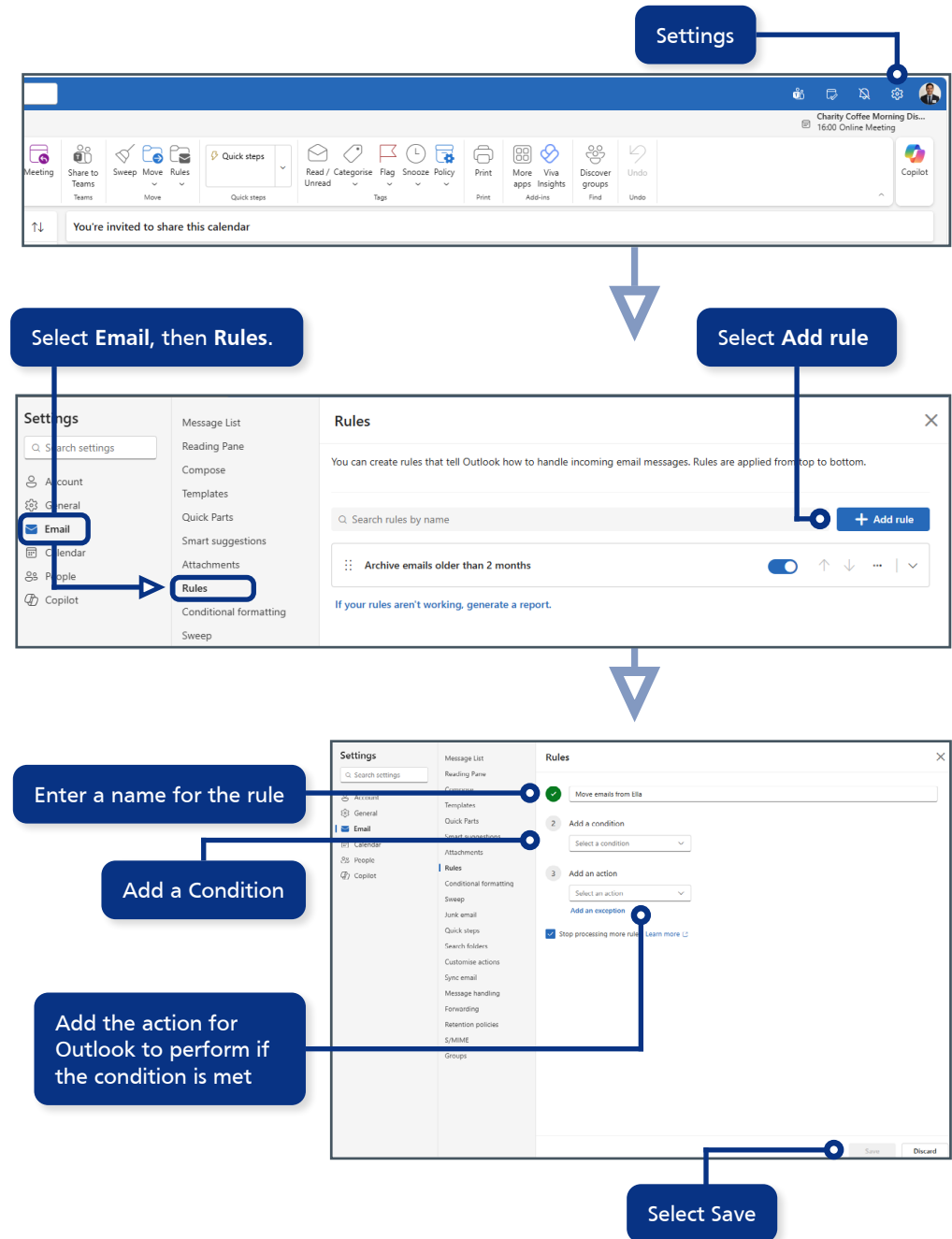
If you frequently move emails from a particular colleague to another folder manually, this can become time consuming. Outlook Rules are designed to remove the need to do this manually by automatically applying an action, such as move to another folder, after a condition has been met, such as received from a specific person.

You can set up a rule once, then let Outlook manage the email as soon as it arrives in your Inbox.

This is a great time saver and also can help keep your Inbox organised and controlled.

Creating an inbox rule

- 1 Open Outlook on the Web and select **Settings**.
- 2 Go to **Mail**, then **Rules**.
- 3 Create a new rule and enter a name for the rule.
- 4 Choose a minimum of one **condition**, such as if the mail is from a specific sender or recipient, contains subject words or message importance.
- 5 Choose the **action**, such as move to folder, categorise, flag or delete.
- 6 Add **exceptions** where a message should not be automated.
- 7 **Save** the rule. The rule will then start from the next time users receive an email and the condition of the rule is met.





Examples of Rules used to move messages

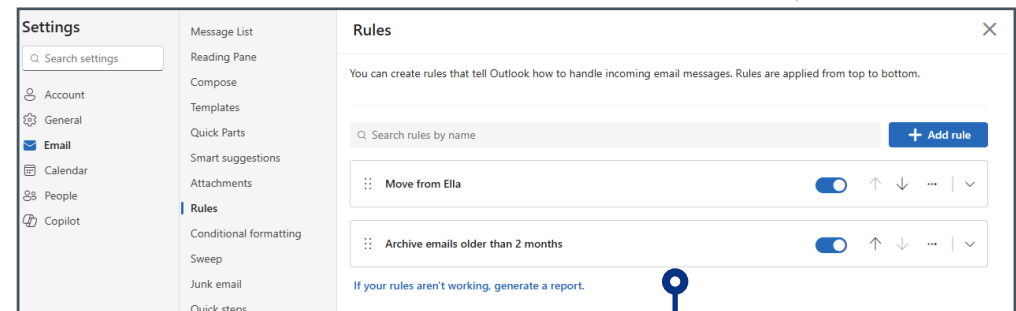
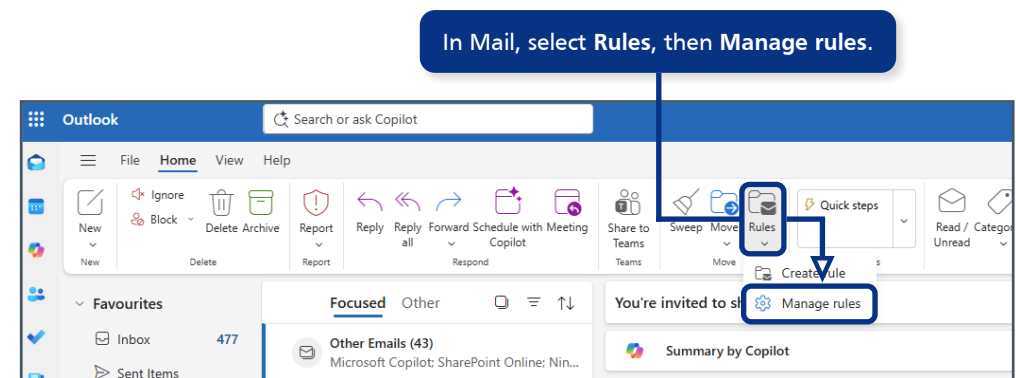
- Move emails from a specific person to a named folder.
- Move newsletters or non-urgent updates away from the main inbox.
- Move project-specific emails into a project folder when the subject or sender condition is met.

Tips on using Rules

- ✓ Rules are most valuable for predictable email patterns.
- ✓ Use a small set of suitably named rules instead of many overlapping rules.
- ✓ Review rules periodically as teams, projects and senders change.
- ✓ Use Delete or Forward actions with caution, they may result in unintended message handling.

Managing Rules

You can manage rules created by pausing, deleting or re-ordering them in priority order if there is overlap.



Inbox Automation

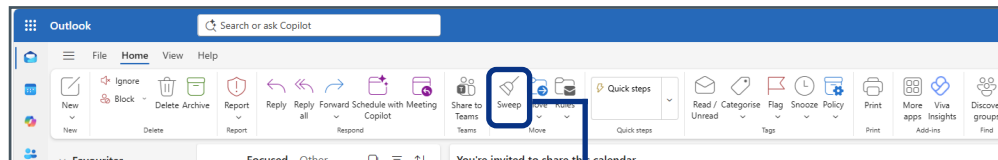
There are other tools available in Outlook on the web that can assist with automating the inbox:

Sweep

If your Inbox has become too cluttered and you need a quick way to deal with many emails, then Sweep can help. It is a mailbox-clean-up automation tool that can allow you to:

- Automatically delete emails from a sender
- Keep only the latest message in a conversation of many emails with the same subject
- Delete messages older than a chosen age
- Move emails from a sender to another folder

A key difference is that Sweep runs periodically, while Rules process messages as they arrive.



Sweep messages

For messages from:
Ella Whitmore (demo19@phxdemo.co.uk)

☐ Move all messages from the Inbox folder
☐ Move all messages from the Inbox folder and any future messages
☒ Always keep the latest message and move the rest from the Inbox folder
☐ Always move messages older than 10 days from the Inbox folder

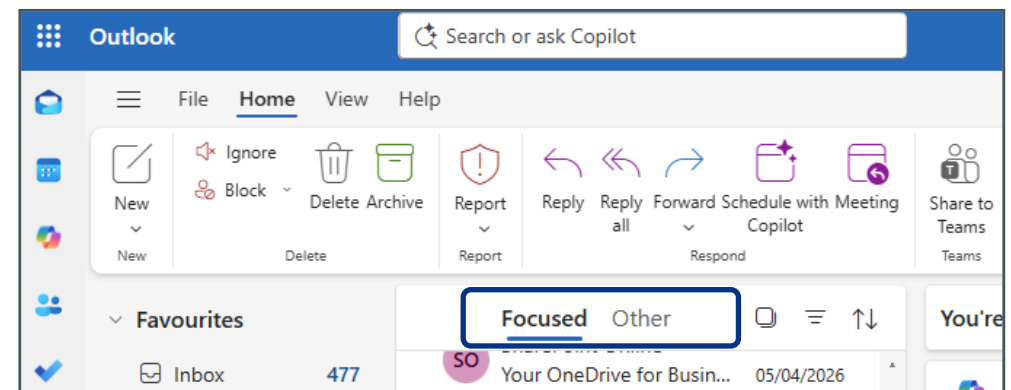
Move to: Deleted Items

Managing Focused Inbox

Focused Inbox separates the inbox into **Focused** and **Other** tabs. The idea of this is to keep important messages in the Focused tab and less important emails, such as emails from advertisers or non-work related emails, in the **Other** tab. It provides another way to keep your inbox organised and focused on work emails that matter.



Move email examples between Focused and Other so Outlook learns what matters and is important. Right click an email in the Inbox, select **Move**, then **Move to Focused/Other Inbox**.



Note: Review the **Other** Inbox regularly to ensure you are confident that important messages are not being missed.

The **Focused** inbox is not a separate folder system. It is designed to be more of a filter of the Inbox.

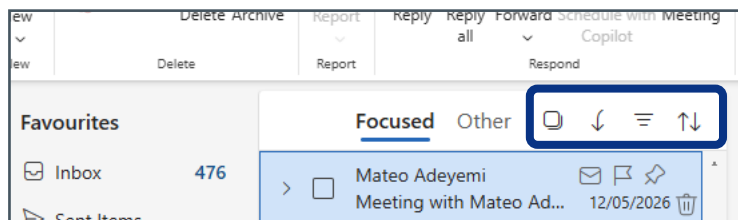
Managing priority messages

- ! Use importance for messages where priority needs to be visible to recipients.
- ! Use flags and To Do for personal follow-up.

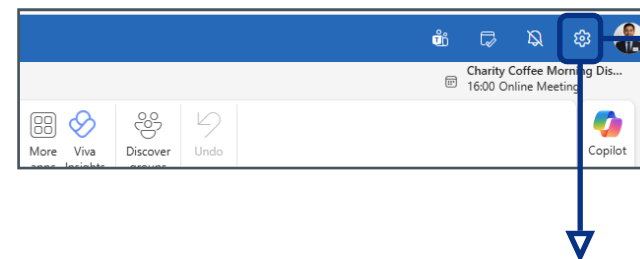
- ! Use categories where colour coding supports an agreed team or personal workflow.
- ! Use rules for repeated patterns and **Quick Actions** for user-led decisions.

Quick Actions

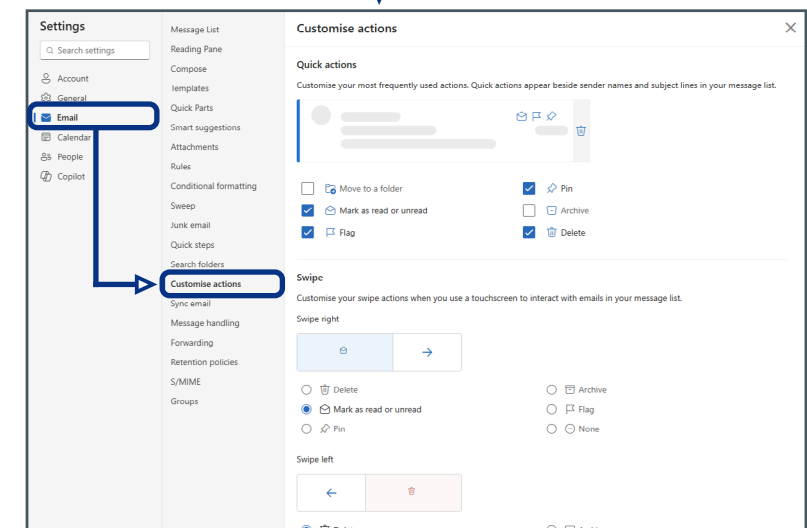
Quick Actions are very useful if you use the same settings such as Reply, Flag or Mark as Unread frequently. Instead of having to find these options in the toolbar at the top of the screen, you can keep your most used tools in the **Quick Actions** area of the email, shown here.



It saves time by potentially requiring a single click instead of multiple clicks to perform the same command.



Quick actions are managed by going to **Settings**, **Email** and then **Customise actions**.



Quick Actions continued

Common examples of Quick Actions

Delete: remove messages that do not need retention.

Archive: clear completed messages from the inbox while retaining them.

Flag: mark a message for follow-up and surface it through To Do.

Pin: keep an important message visible at the top of the inbox.

Move: file a message into a specific folder.

Mark as read or unread: control what still requires attention.

How Quick Actions speed up email processing

- ✓ They reduce clicks for frequent actions.
- ✓ Support consistent triage processes across users.
- ✓ Assist users in processing email in groups other than opening each message.
- ✓ They are more controlled than rules because the user chooses when to apply the action.

Recommended use cases

Use case	Recommended Quick Action	Why it helps
Routine information - already read	Archive	Keeps the inbox focused on current work.
Important email needed today	Pin	Keeps the message visible at the top of the inbox.
Email requiring later action	Flag or create task	Connects the follow-up to the To Do panel
Email not relevant	Delete	Removes unnecessary and/or irrelevant emails from the inbox
Project update to retain	Move	Files the message into a specific folder. Helps with organising a mailbox and allows for better Email retrieval.

Productivity Tips for Managing Email Efficiently

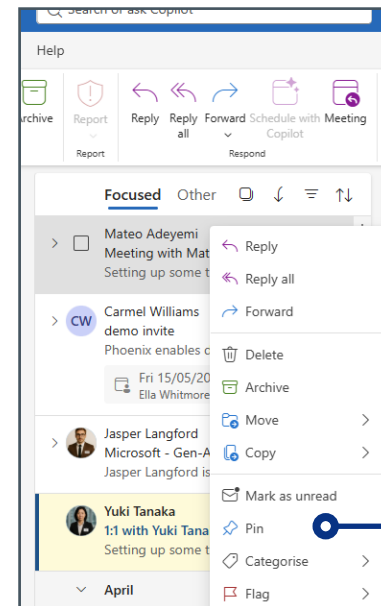
Pinning emails

If you receive an important email and you want to make sure you can see it easily, as there may be a lot of emails being received during the day, Pinning a message allows you to keep it at the top of your inbox, so you can find it later. This reduces the need to find or search for it when the email needs to be retrieved quickly or accessed easily.

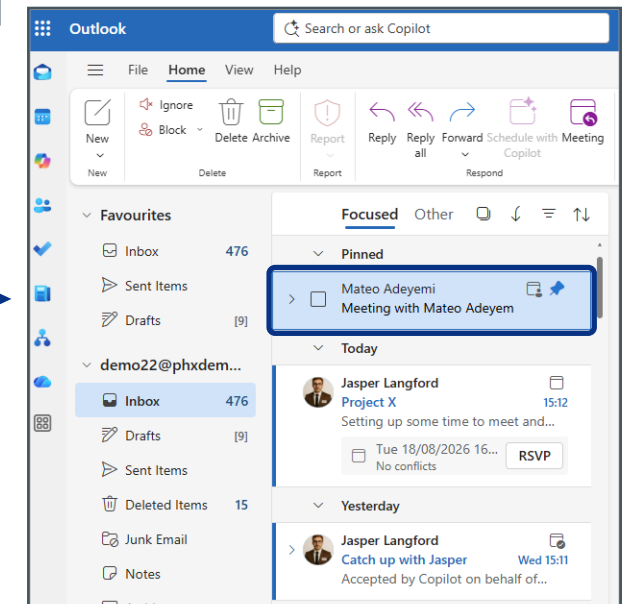
Note: For Pinned messages to be visible, the inbox is required to be sorted by date order.

Recommended guidance for using pinned messages:

- Use pinning for messages that must remain visible today.
- Unpin messages once the action is complete.
- Limit the number of pinned messages to avoid creating additional clutter at the top of the inbox.



Right click an email in your Inbox, then select Pin.



Productivity Tips for Managing Email Efficiently continued

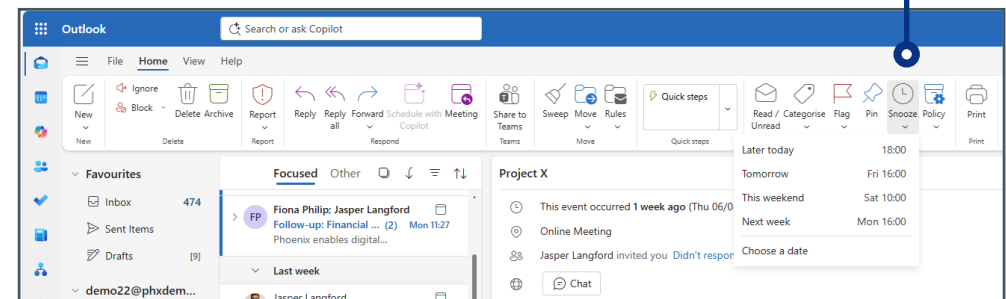
Snoozing emails

If an email arrives in your inbox and you cannot deal with it at that time, you can use the Snooze tool to temporarily remove the message from the inbox until it is needed. This helps prevent important messages from being overlooked while keeping the inbox focused. The message then returns as an unread message to the inbox at the date and time selected by you.

Snooze can be useful in the following scenarios:

- Further information is required from another person before you can respond
- An action is not required until later that day/week
- You are working through your inbox and wants to focus only on priorities for that day
- The email relates to a future deadline or event

To Snooze an email, select **Snooze**, then the **date/time** required.



By using tools such as My Day, To Do, rules, Quick Actions, pinning and snoozing, you can turn Outlook into a more organised and manageable workspace. Start with the features that solve your biggest inbox challenges first, then build from there as your confidence grows.