

Customise Your PC Outlook Settings

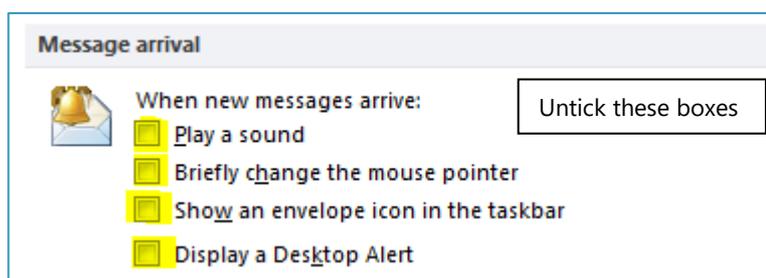
Turn off new email alerts

Turn off new email alerts to eliminate the distraction of being notified when a new email arrives and the temptation to look at new emails in an undesignated time.

- ✓ Go to the **File** tab (left hand corner of Outlook ribbon)
- ✓ Click **Options**
- ✓ Click on the **Mail** menu (on LHS)
- ✓ Under **Message arrival** heading, clear all the check boxes.

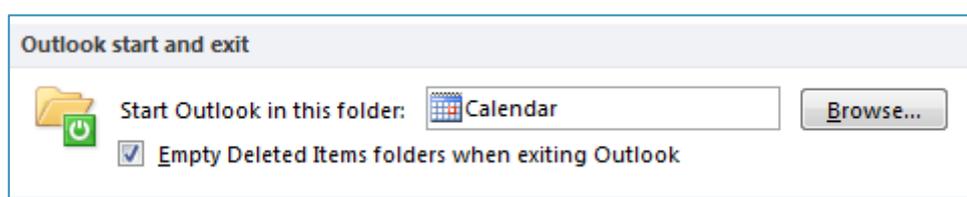
OR

- ✓ Right-click the Outlook icon in the Microsoft Windows notification area. To clear the check mark, click Show New Mail Desktop Alert.



Open Outlook in calendar or tasks; not your inbox

- ✓ Go to the **File** tab (left hand corner of Outlook ribbon)
- ✓ Click **Options**
- ✓ Click on the **Advanced Options** menu (on LHS)
- ✓ Under **Outlook start and exit** menu click **browse** to bring up a list of folders
- ✓ Select the folder in which you want Outlook to open
- ✓ Click OK.

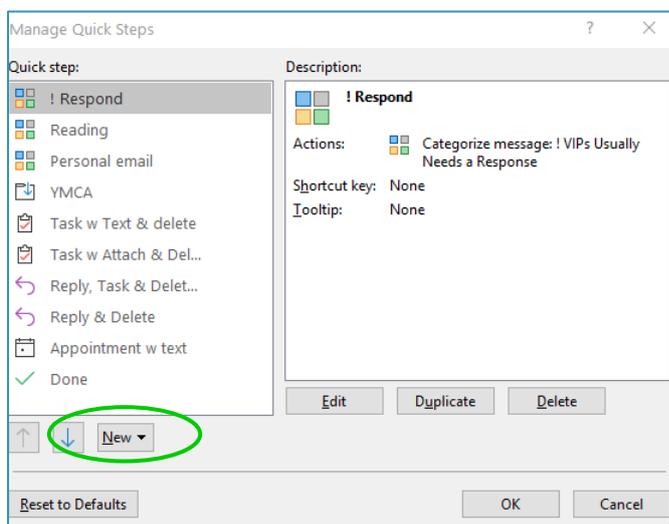


Set up Quick Steps

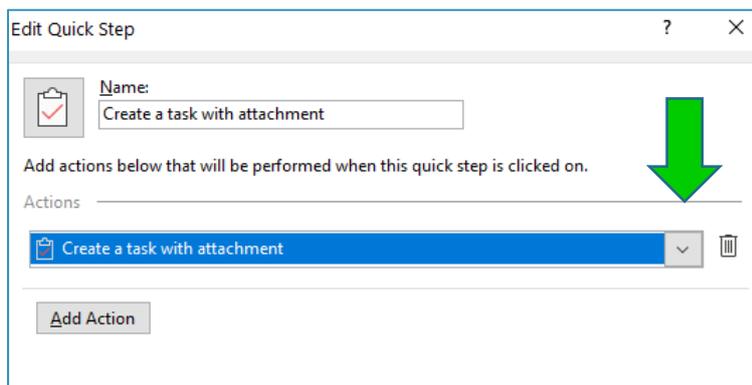
Set up this Quick Steps to quickly and easily defer emails to Tasks:

Create a task with attachment

- ✓ Go to your Email Inbox
- ✓ Make sure you are in the **HOME** tab
- ✓ Find the **Quick Steps** sections in the top ribbon
- ✓ Click **Create New** button

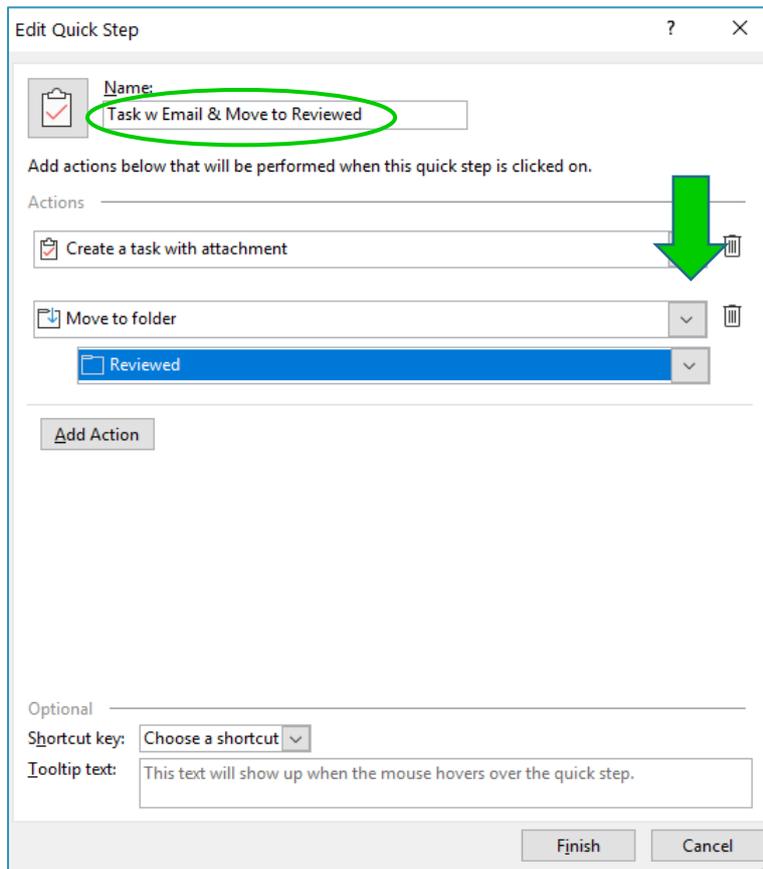


- ✓ Click the arrow on the **Choose an Action** drop down menu
- ✓ Scroll down and select **Create a task with attachment**



- ✓ Click on the button **Add Action**
- ✓ Click the arrow on the **Choose an Action** drop down menu
- ✓ This time select **Move to folder**
- ✓ Click the arrow on the **Choose folder** drop down menu

- ☞ Select where you would like to move your email to after you've created a Task. I put mine in my Deleted Items, but many people like to move the email to a folder called Reviewed
- ☞ Change the name of the Quick Step to an abbreviation such as *Task w Email & Move*
- ☞ Click **Finish** button



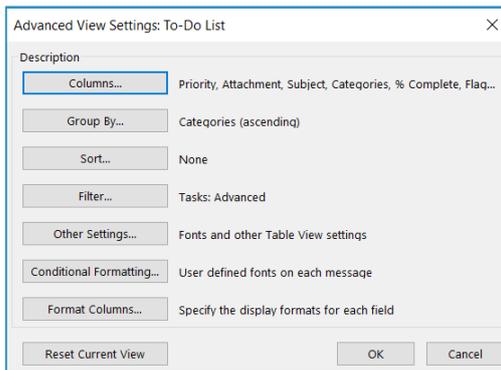
Customise your task view

View Tasks Next to Your Calendar

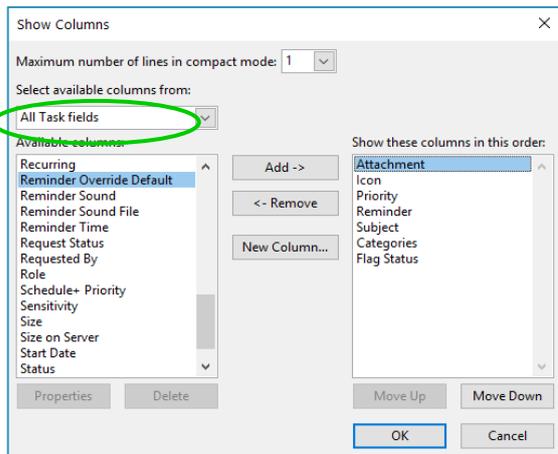
- ☞ Start in the **Calendar**
- ☞ Go to the **View** tab in the very top ribbon
- ☞ Go to the Layout section and click on the **To-Do Bar**
- ☞ Select **Tasks**

Select Columns

- ☞ Placing your mouse over the top of the now visible To-Do Bar, right click and select the last option in the list called **View Settings**
- ☞ You should now see a box called **Advanced View Settings: To-Do List**



- ☞ Go to the 1st button on the list called **Columns...** and click to open
- ☞ Select and delete so that you have these 7 columns:

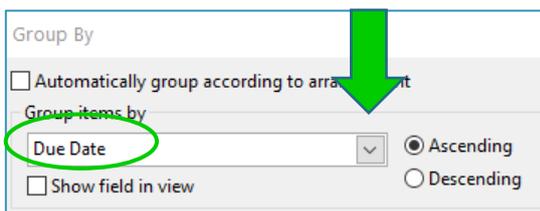


1. Icon
2. Priority
3. Attachment
4. Subject
(note it needs to be Subject and NOT Task Subject)
5. Categories
6. Reminder
7. Flag Status

- ☞ Click OK

Group Tasks by Date

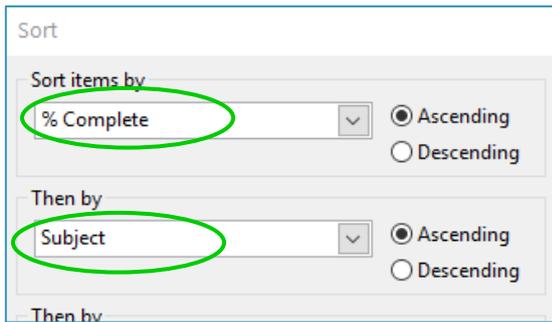
- ☞ Go to the 2nd button on the list called **Group By...** and click to open
- ☞ Untick the first box Automatically group according to arrangement
- ☞ Select Due Date in the first drop-down box
- ☞ Click OK in the **Group By t** menu.



Sort Tasks in Alpha Order

- ☞ Open the 3rd button called **Sort...**
- ☞ Select **% Complete** in the first drop-down menu
Even if you don't use % Complete, I'd recommend adding it as your 1st sort criteria as then your completed items will group at the bottom of your daily Tasks
- ☞ Select **Subject** in the second drop-down menu

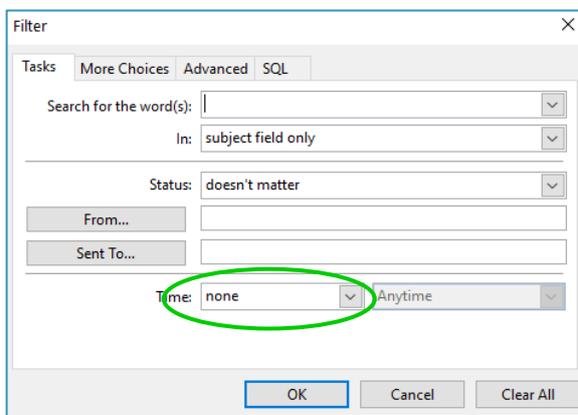
✓ Click OK in the **Sort** menu.



Filter Tasks

✓ Go to the 4th button on the list called **Filter...** and click to open.

✓ At the bottom of this main tab of the Filter check that the Time is selected as **none**.



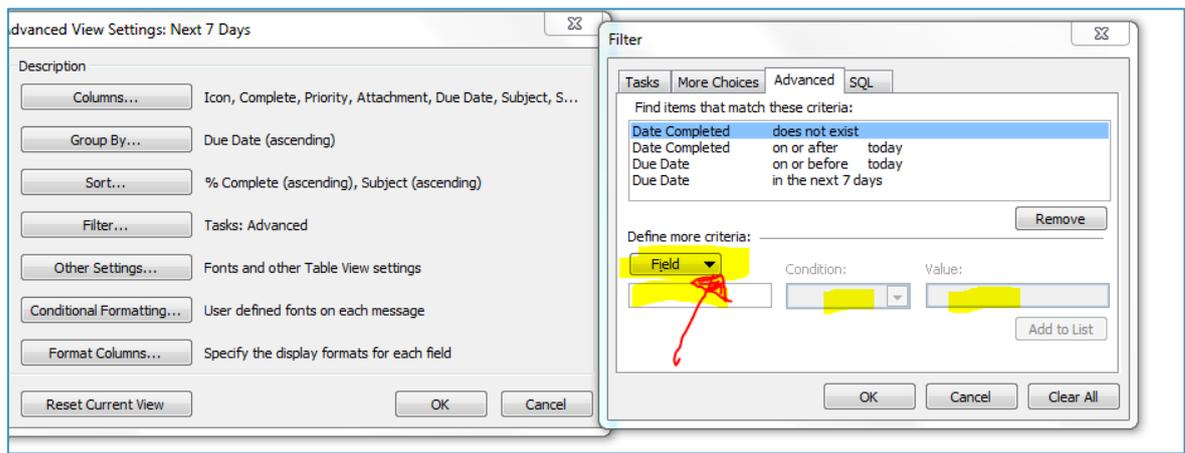
✓ Next go to the **Advanced** tab in the Filter section (3rd tab along the top of the Filter subsection)

✓ Select the Field drop-down menu

✓ Then select the 3rd option from the drop-down menu called Date/Time fields

✓ And add in these fields:

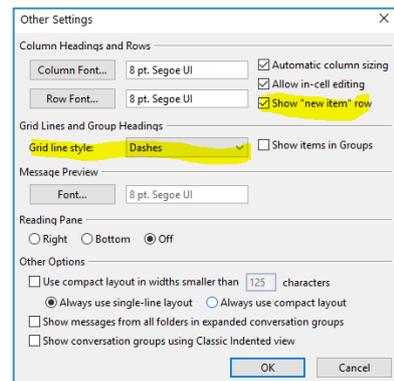
Field	Condition	Value	Purpose
1. Date Completed	does not exist		Carries forward overdue tasks
2. Due Date	On or before	today	Carries forward overdue tasks
3. Due Date	Does not exist		Lists tasks without a due date
4. Date Completed	on or after	today	Shows the tasks you complete today (as ticked and in a smaller struck font)
5. Due Date	In the next 7 days		Defines the period of tasks you want to view



- ✓ Select **Add to List** as you add each condition
- ✓ Click OK as you leave the Advanced View Settings: Next 7 Days screen
- ✓ You should now see your overdue tasks as well as tasks due in the next 7 days. 😊

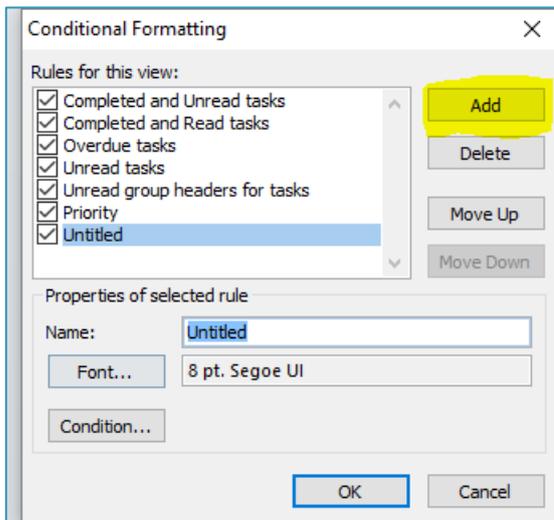
Check Other Settings

- ✓ Go to the 4th button on the list called **Other Settings...** and click to open
- ✓ Make sure all 3 boxes on top LHS are ticked
- ✓ Select a Grid line style (I like dashes).

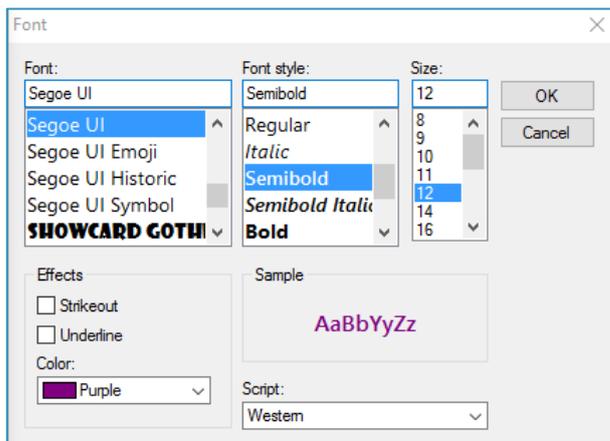


Highlight Today's Tasks

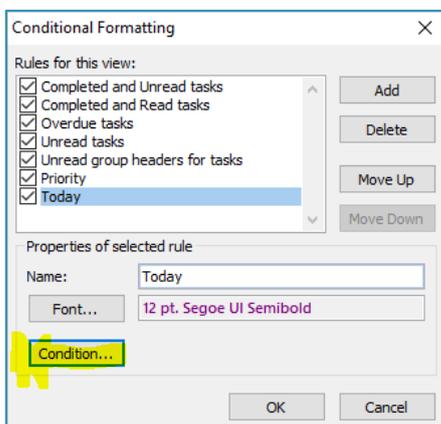
- Go to the 6th button on the list called **Conditional Formatting...** and click to open
- Select the **Add** button on the top RHS

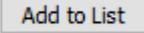


- By clicking **Add** you will have an untitled rule at the bottom of the list
- In the little section called **Properties of selected rule** change the name from Untitled to Today
- Click on the button called Font and select the font style and colour for your tasks for the current day. The example below uses Segoe UI, Semibold, 12, Purple



- Click OK
- Next choose the Condition button

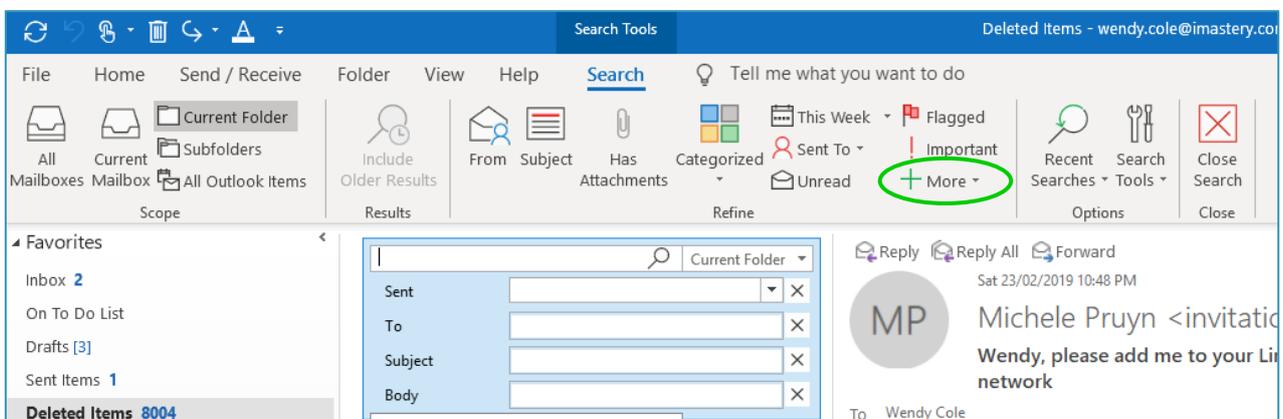


- ✓ Select the 3rd tab along the top called **Advanced**.
- ✓ Click on the **Field** button with the drop-down arrow 
- ✓ Select **Date/Time fields** and **Due Date**.
- ✓ Change the Condition drop-down menu from Anytime to **Today**.
- ✓ Click the button **Add to List**. 
- ✓ Click **OK**.
- ✓ Click **OK** again on the next screen.

You should now have your Tasks in your To-Do Bar set up to work optimally. After you have worked with this for a little, you might like to make further customisations.

Enhance your search features

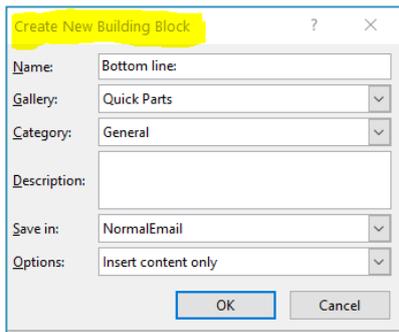
- ✓ Go to your deleted email folder
- ✓ Put your cursor in the **Search Deleted Items** field at the top LHS of the deleted email folder
- ✓ Go to the ribbon about two-thirds along, click on the drop-down menu next to the **More** icon
- ✓ Select the Common Properties that you'd find useful in a search, e.g.: Sent, To, Subject & Body



- ✓ To search a specific phrase, with words in an exact sequence use quotation marks around the search string. For example "Information Technology".
- ✓ AND, NOT, OR, <, >, =, and other operators are used to refine your search. Operators should be typed in uppercase letters. For more information about the Boolean search features in Outlook, see article at <https://support.office.com/en-us/article/learn-to-narrow-your-search-criteria-for-better-searches-in-outlook-d824d1e9-a255-4c8a-8553-276fb895a8da>

Add AutoText

- ✓ Start a new email and type and format your desired text
Try creating a highlighted box for your bottom line summary.
- ✓ Now highlight your text
- ✓ Click on the **Insert** tab in the email ribbon
- ✓ In the **Text** section of the toolbar (second from the right), select Quick Parts
- ✓ Go to the end of the Quick Parts drop-down menu and select the last option Save Selection to Quick Part Gallery



- ✓ Change the name to an associated keyword (must be at least 4 characters)
- ✓ Add a description if you'd like
- ✓ Click OK
- ✓ Test your new AutoText by opening a new email and typing your keyword.

iMastery Resources



This complimentary set of instructions to optimise Outlook is part of iMastery's ongoing support to organisations and individuals and their pursuit for high performance and productivity, leadership and employee engagement.

Access additional free content and articles at <https://imastery.com.au/category/blog/>

About iMastery and Wendy Cole

iMastery is a boutique Australian consultancy, working with organisations through in-person and remote training, coaching and keynote presentations. iMastery's areas of expertise include leader as coach, mastering distractions, and optimising focus.

iMastery was founded in 2005 by business owner, consultant and entrepreneur, Wendy Cole. Wendy works directly with organisations and individuals to foster high-performance. Wendy's strengths as a facilitator and coach are her ability to ensure that coaching and training are both inspiring and practical and that participants gain tangible knowledge that they can immediately apply in their work and personal lives.

Wendy utilises accelerated learning techniques and supports participants to hold themselves accountable to apply their learning.

Connect

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