

# Using *Take Back Your Life!* with Outlook 2010

*A user guide to technical settings*

## Technical Instructions for setting up your Outlook 2010

### INTRODUCTION

One of the great benefits of the methodologies behind our popular book and group seminar, *Take Back Your Life!*<sup>™</sup> (TBYL), is that it provides techniques for reclaiming and refocusing time by leveraging Microsoft Outlook software. While we utilize and leverage Microsoft technology in order to create a space for productivity and effectiveness, the purpose of the TBYL training is truly as it says: to have our course graduates and readers of the book actually *take back their lives!* Therefore, the techniques and methodologies in our training are designed to dig deeper than simply leveraging technology; they are intended to create alignment, focus, integrity and accountability.

As Microsoft Outlook changes and improves, and as new versions are released, the methodologies remain quite universal. They can be applied regardless of the version of Outlook you or your organization use, and the distinctions from both the book and the training are created for people rather than technology. Therefore, while there might be changes in the menus and functions of the software, the productivity methods and protocols in the TBYL course and book remain consistent and effective.

With the release of Microsoft Office 2010, we have designed this users guide to update our clients on some of the subtle but important changes from the 2007 version. In this short, concise guide you will find technical settings that support Outlook 2010. The information in this guide will allow you to seamlessly apply the same methodologies from the TBYL book and training course to your new Outlook 2010 setup, while allowing you to adapt the system to your own work style and workload.

Thank you for taking the time to review this guide and apply the changes within. We hope you find great success in setting up and managing your new Integrated Management System and wish you an abundance of productivity and balance for yourself and your company.

The McGhee Productivity Solutions Team

## Technical Instructions for setting up your Outlook 2010

### Setting up the Integrated Management System (IMS) View

You can view your calendar by day, work week, week, month or schedule view. We recommend week or work week

1. Go to your calendar in Outlook
2. Select **Home** from the tabs at the top of your window
3. Choose the "Week" icon in the toolbar
4. Select **View** from the tabs at the top of your window
5. Select the "**Daily Task List**" icon in the ribbon. Choose **Normal** from the list that pops up.
6. Select the "**To-Do Bar**" icon in the ribbon. Choose **Normal** from the list that pops up.
  - a. Select the **Date Navigator** option
  - b. Unselect the **Appointments** option
  - c. Select the **Task List** option

### Setting up the To-Do Bar

1. Right click on the words "**Arrange by:** " (located above the space where it says *Type a new task*)
2. Select **View Settings** from the bottom of the window.
3. Click on the **Columns** button.
  - a. Modify the list on the right hand side by removing columns you don't want
  - b. Our recommended columns to add are:
    - i. Icon
    - ii. Complete
    - iii. Attachment
    - iv. Subject
    - v. Due Date
  - c. Click **ok** to return to the **Advanced View Settings: To-Do List** window
4. Click on the **Group by** button.
  - a. Unselect the box next to **Automatically group according to arrangement**
  - b. Select **Categories** from the drop down box
  - c. Click the button next to this entry which says **ascending**.
  - d. In the bottom right hand corner select **All collapsed** from the Expand/Collapse Defaults
  - e. When you are finished click **ok**.
  - f. Click **ok** to return to the **Advanced View Settings: To-Do List** window
5. Click on the **Sort** button.
  - a. Use the drop down arrow under **sort items by** to select subject
  - b. Click the button next to this entry which says **ascending**.
  - c. Click **ok** to return to the **Advanced View Settings: To-Do List** window
6. Click on the **Filter** button
  - a. Turn the filter off by clicking on **clear all**
  - b. When you are finished click **ok**
7. Click on the **Other Settings** button
  - a. Top three boxes in upper right should be checked: **Automatic column sizing**, **Allow in-cell editing** and **Show new item row**
  - b. Under **Other** options uncheck **Use compact** layout

## Technical Instructions for setting up your Outlook 2010

### To change the task default due date

1. Right click on **Categories: (none)** in the To-Do Bar. (If you don't see Categories: (none) it's likely because you don't have a task in your To-Do Bar. Create a new task and save and close.
2. Select **Follow up**
3. Select **Set Quick click**
4. Select **No Date** from the dropdown and click **OK**

### To add a contacts field to a task

1. Select **File** from the tabs at the top of your window
2. Select **Options** from the menu on the left
3. Select **Contact** from the menu on the left
4. Under **Linking**, check the box – **"Show contacts linked to the current item"**

### Creating a Category List in Outlook

1. Go to your task list from the lower left-hand corner
2. Select **Home** from the tabs at the top of your window
3. Click on **New Task**
4. From the task screen, select **Categorize**
5. Select **All Categories** from the drop down list
6. Save any categories that you are currently using, but delete all others
7. Select **New** and type in the category name
  - a. The task categories we suggest are on pages 134 & 135 in the 2007 version of the 'Take Back Your Life!' book
  - b. When entering your Meaningful Objectives and Supporting Project categories, be sure to type a period in front of the names
  - c. Each direct report, family member or boss can have his or her own 1:1 category
  - d. Add all the SNA categories to discover which ones work best for you
8. Click **OK**
9. Close the open task by clicking the "x" in the upper right hand corner
10. Click **no** when asked if you want to save changes

### To categorize an existing appointment in your calendar

1. Right click on the calendar appointment you wish to color.
2. Hover over the word **categorize** in your list.
3. Click on the category name from the pop up list. If you do not see the category name you desire click on the words **all categories** at the bottom of the pop up screen.
4. Place a check in the box next to the category name you desire.

## Technical Instructions for setting up your Outlook 2010

### Starting Outlook in the Calendar View (IMS View)

1. Go to any Outlook window and select the **File** tab
2. Select **Options** from the menu on the left
3. Select **Advanced** from the menu on the left
4. Under the heading **Outlook start and exit** click on the **browse** button to the right of Start Outlook in this folder.
5. Select calendar and choose **OK** and **OK** again to exit

### Turning off the e-mail notifications

1. Go to any Outlook window and select the **File** tab
2. Select **Options** from the menu on the left
3. Select **Mail** from the menu on the left
4. Under the heading **Message Arrival** unselect the following:
  - a. Play a Sound
  - b. Briefly change the mouse pointer
  - c. Show an envelope icon in the taskbar
  - d. Display a Desktop Alert.
5. Choose **OK** to exit

### Inserting a document, e-mail or link into an existing task

1. Open the e-mail, task or calendar appointment where you want to insert the document or e-mail
2. Put your cursor into the body of the task, e-mail or calendar appointment where you want the item to be inserted or the hyperlink to appear.
3. Click the **Insert** tab at the top of the window.
  - a. To insert a document:
    - i. Select **Attach File** (with the paperclip icon) to insert a document
    - ii. Find the document you want to insert
    - iii. Double click on the name of the file to insert it
  - b. To insert a hyperlink
    - i. Click on the hyperlink button that is on the Insert ribbon
    - ii. Find the document you want to insert
    - iii. Double click on the name of the file to insert a link to it
  - c. To insert an e-mail
    - i. Select **Outlook Item** to insert an e-mail
    - ii. Double click on the e-mail you want to insert
    - iii. The e-mail will remain in your inbox, but a copy of it will be inserted into your task

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### Utilizing Quick Steps

1. Go to your e-mail inbox
2. Click the **Home** tab at the top of the window
3. In the Quick Steps section select **Create New**
4. Click the dropdown arrow next to **Choose an Action**
  - a. Select: Create a task with attachment
5. Select the **Add Action** button
6. Click the dropdown arrow next to **Choose an Action**
  - a. Select: Delete Message
7. Name your Quick Step – **"Move to task and delete"**
8. Click **Finish**

### Utilizing Quick Parts

1. Go your e-mail inbox and select "New E-mail"
2. Type a template (e.g. for a workshop) into the body of an e-mail
3. Highlight the text, then click on the **Insert** tab and select 'Quick Part'
4. Select "Save Selection to Quick Parts gallery" at the bottom of the window
5. Name the Quick Part template
6. To insert your Quick Part template into a new e-mail, select the **Insert** tab at the top of your screen, place your cursor where you want the text to appear in the body of the e-mail, and click on the appropriate Quick Part **OR** type the name of the desired Quick Part into your e-mail and click F3