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Productivity Solutions

Using *Take Back Your Life!* with Outlook 2007

A users guide to technical settings

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Technical Instructions for setting up your Outlook 2007

INTRODUCTION

One of the great benefits of the methodologies behind our popular book and group seminar, *Take Back Your Life!*™ (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.

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

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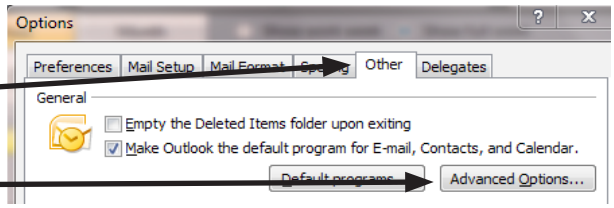
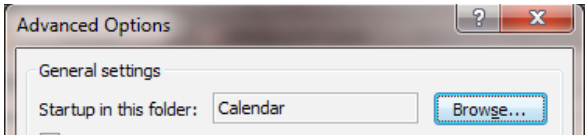
Changing your view from opening in your inbox to opening in your calendar

1. Go to any Outlook screen and select ***Tools*** from the list of options across the top of the screen.
2. Select ***Options*** from the bottom of the drop down box.
3. Select ***Other*** from the tabs across the top of this drop down box.
4. Click on the box labeled ***Advanced Options*** from the middle of this screen.

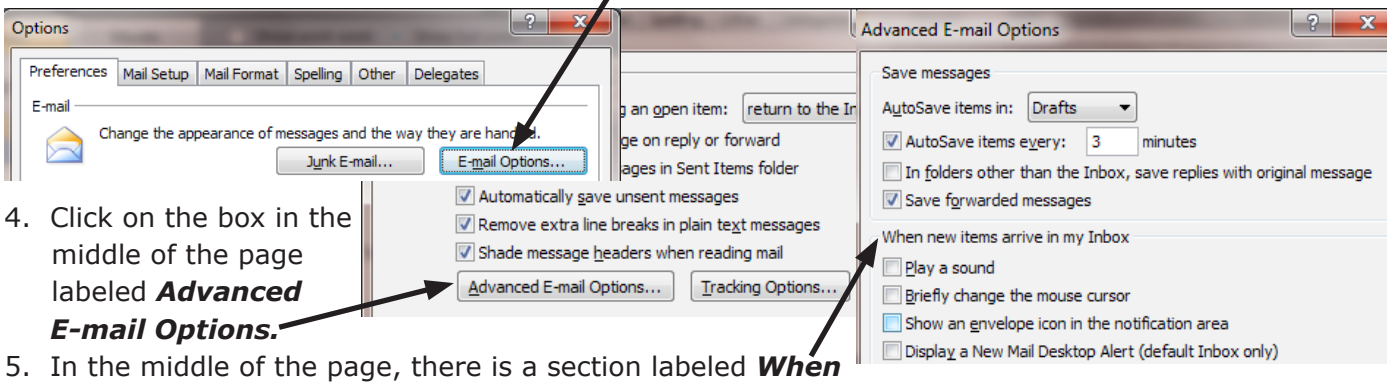




5. Click on the box that says ***Browse,*** and highlight ***Calendar*** and click ***OK***.
6. Choose ***OK*** and ***OK*** again.

Turn off the e-mail notifications in order to eliminate constant distractions

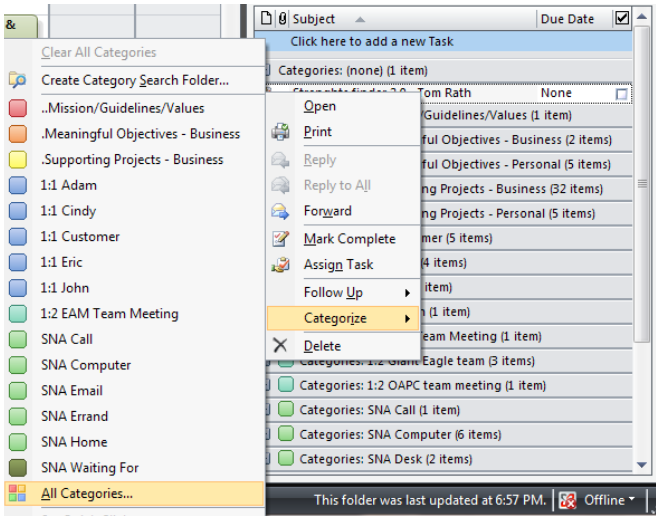
1. Go to any Outlook screen and select ***Tools*** from the list of options across the top of the screen.
2. Select ***Options*** from the bottom of the drop down box.
3. Click on the box labeled ***E-mail Options.***



4. Click on the box in the middle of the page labeled ***Advanced E-mail Options.***
5. In the middle of the page, there is a section labeled ***When New Items Arrive in my Inbox.*** Uncheck the four boxes in this section beginning with ***Play a Sound***.
6. Select ***OK***, ***OK*** and ***OK*** at the bottom of the three screens.

To create new categories in Outlook

1. Open a new task
2. From the menu, select ***Categorize*** then ***All Categories***.
3. Rename any of the colors on the list, or select ***new*** and ***type*** in the category name. Click ***OK***. When you are finished, click ***OK*** again.
4. Delete the blank task you opened.
4. The task categories we suggest are in the 2007 *Take Back Your Life!* book on pages 134-135.
5. The calendar categories we suggest are in the 2007 *Take Back Your Life!* book on pages 316-317.



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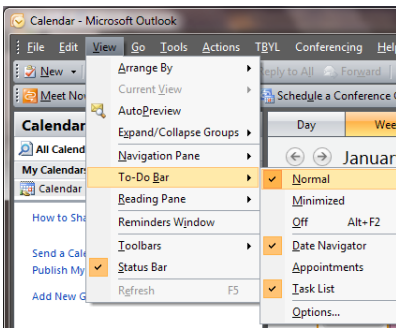
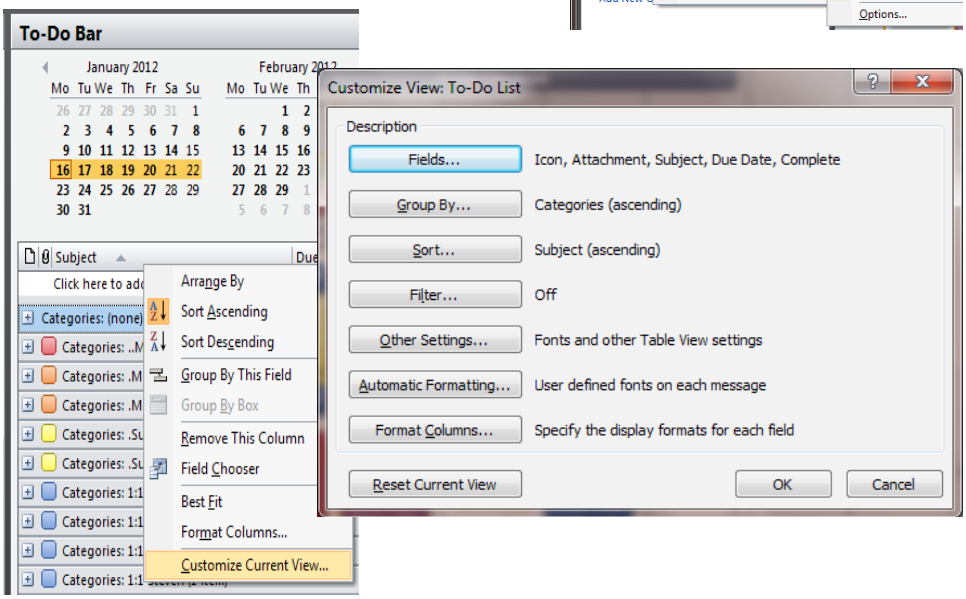
To view your To-Do Bar on the right hand side of your calendar

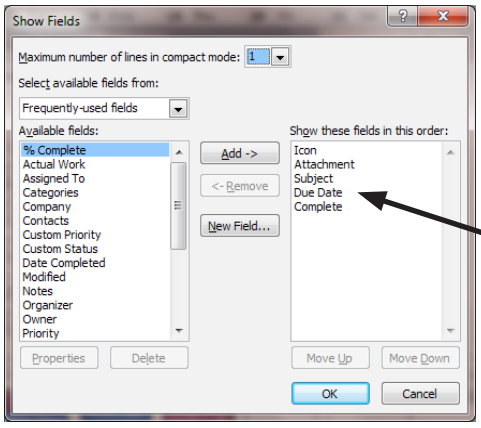
1. Go to your calendar in Outlook.
2. Select ***View*** from the menu at the top of your page.
3. Select ***To-Do Bar*** from the menu, then select ***Normal***.
4. Select ***To-Do Bar*** from the menu, then deselect ***Appointments.***



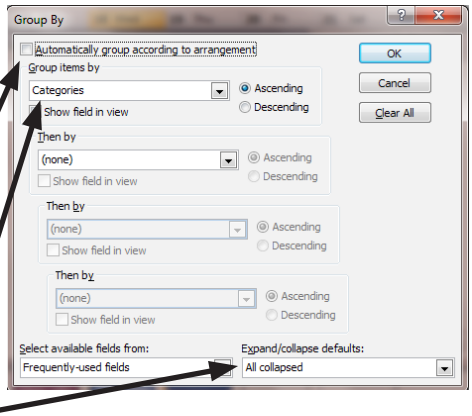
To customize the To-Do Bar settings on the right hand side of your calendar

1. Drag the edge of your To-Do Bar screen to the left until you see as much of it as you would like.
2. Right click on the grey bar above ***Click Here to Add a New Task.***
3. Choose ***Custom*** or ***Customize Current View*** from the bottom of the menu.





4. Click on the ***Fields*** button.
   - Under ***Select Available Fields From,*** Choose ***Frequently Used Fields***
   - The fields we recommend to add are:
     - Icon
     - Attachment
     - Complete
     - Subject
     - Due Date
   - When finished, click ***OK***.



5. Click on the **Group By** button.
   - If ***Automatically Group According to Arrangement*** is checked, deselect it
   - Under ***Group Items By,*** select ***Categories*** from the drop down list. Click the button next to this entry which says ***Ascending***
   - In the bottom right hand corner, select ***All Collapsed*** from the ***Expand/Collapse Defaults*** drop down list
   - When you are finished, click ***OK***

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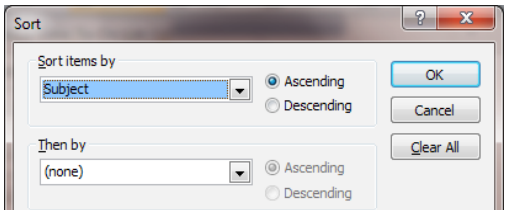
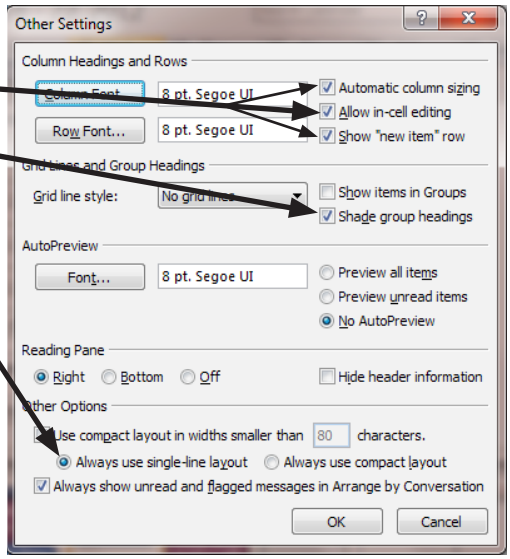
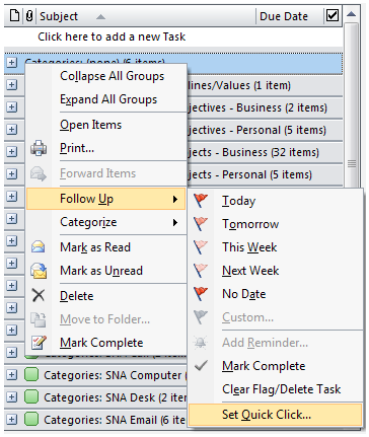
6. Click on the ***Sort*** button.
    a. Under ***Sort Items By,*** select ***Subject*** from the drop down list
    b. Click the ***Ascending*** button to the right of ***Subject***
c. When you are finished, click ***OK***
7. Other Settings
    a. Top three boxes should be checked in upper right: ***Automatic Column Sizing, Allow In-Cell Editing*** and ***Show New Item Row***
    b. 5th box ***Shade Group Headings*** should be checked
    c. Under ***Other Options,*** deselect ***Use Compact Layout*** so ***Always Use Single Line Layout*** is selected
    d. Click ***OK***







To change 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 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 menu. If you do not see the category name you desire click on ***All Categories*** at the bottom of the menu.
4. Place a check in the box next to the category name you desire.

To create a task in your To-Do Bar and categorize it

1. Navigate to your ***To-Do Bar*** in Outlook. Double click where it says ***Click Here to Add a New Task*** at the top of the ***To-Do Bar***, or you can type Ctrl + Shift and tap the letter K. Or, you can hold down the Ctrl + Shift keys at the same time while tapping the letter K.
2. To categorize a task when you have the task open, you simply left click on the 4-square color block in your tool bar.
3. Click on the category name from the drop down list. If you do not see the category name you desire, click on ***All Categories*** at the bottom of the drop down menu. Select your desired category and put a check in the box to the left of the category name and click ***OK*** at the bottom of your screen.

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4. To categorize a task that is already in your task pad under ***Categories (None)***, simply right click on the task in your task pad and hover over the word ***Categorize*** in the list that pops up. Place your cursor over the category you desire and click on it. If you do not see the category you want, click on ***All Categories*** at the bottom of the drop down list. Select your desired category and put a check in the box to the left of the category name and click ***OK*** at the bottom of your screen.

To insert a document or e-mail into an existing task

1. Open the task.
2. Put your cursor into the body of the task, e-mail or calendar appointment.
3. Click on the word ***Insert*** in your toolbar at the top of the page.
4. If you are inserting a document, choose the option to attach file.
5. This will bring you to your hard drive. Navigate to the file you want to insert and double click on the name of the file. This will insert the file into the task. Alternately, if you wish to insert a hyperlink to the file vs. importing the actual file, you would go the Insert Menu and click on the Hyperlink button. Once you have found the file you want to link to, double click it and a hyperlink will be pasted into your task.
6. To insert an e-mail into your task, put your cursor in the body of the task where you want the e-mail to appear, then click on the word ***Insert*** in your toolbar at the top of the page.
7. Choose the option to ***Attach Item***.
8. This will bring you into a view of your Outlook folders. If you wish to insert an e-mail, simply navigate to the e-mail you want and double click.

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