

# Using *Take Back Your Life!* with Outlook 2013

## *A User's Guide to Technical Settings*

## *Technical Instructions for Setting Up Your Outlook 2013*

### **INTRODUCTION**

One of the great benefits of the methodologies behind our popular book, group seminar and 1:1 coaching sessions is that *Take Back Your Life!* (TBYL) provides techniques for increasing productivity while having work/life balance using Microsoft Outlook as a tool for success.

As Microsoft Outlook changes and improves, and as new versions are released, the McGhee productivity principles and methodologies remain consistent and effective. With the release of Microsoft Outlook 2013, we have designed this User Guide to support our clients in setting up their Integrated Management System. The information in this guide will allow you to seamlessly apply the same methodologies from the latest TBYL book and training course to the newest version of Outlook.

We hope you find this guide easy to implement and that the Integrated Management System supports the successful completion of your annual objectives and future goals.

Sincerely,

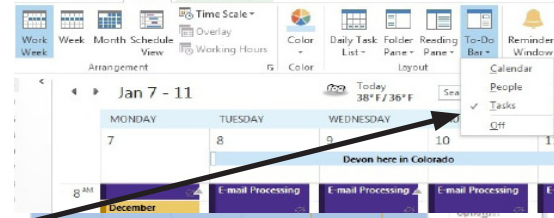
The McGhee Productivity Solutions Team

## Technical Instructions for Setting Up Your Outlook 2013

### 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 **Work 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 **Minimized** from the list that pops up.
6. Select the **To-Do Bar** icon in the ribbon. Select the **Tasks** option.



### Setting up the To-Do Bar

1. Right click on the words **Click here to add a new...**
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. Click **OK** to return to the **Advanced View Settings: To-Do List** window.

5. Click on the **Sort** button.

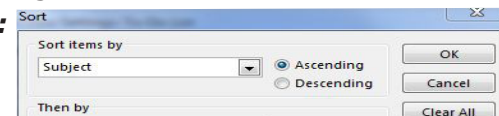
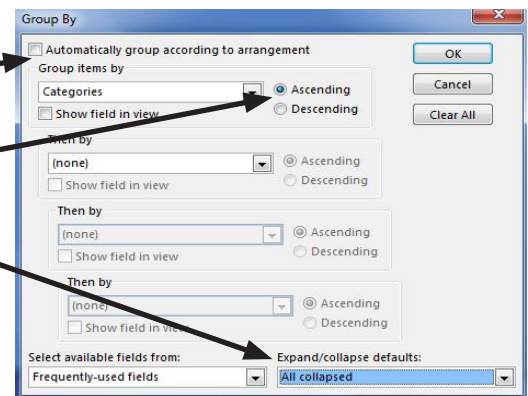
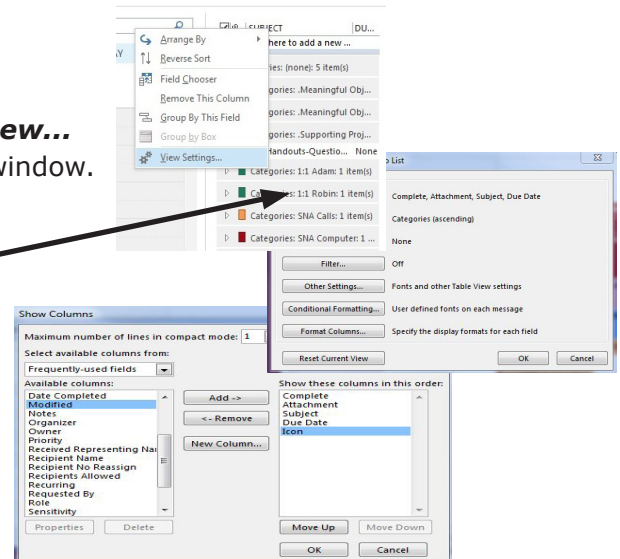
- a. Use the drop down arrow under **Sort Items by** to select **Subject**.

- 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.

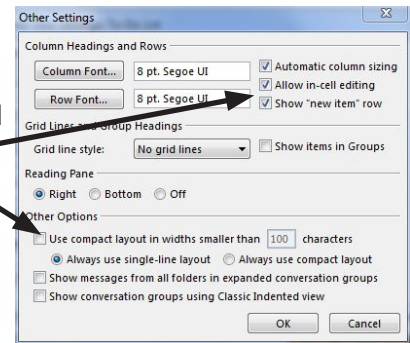
6. Click on the **Filter** button.

- a. Turn the filter off by clicking on **Clear All** in the bottom right corner.
- b. When you are finished click **OK**.



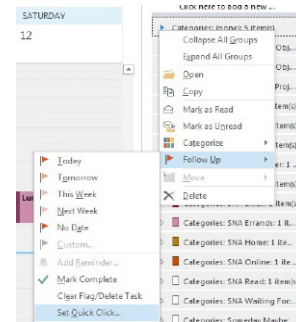
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7. Click on the **Other Settings** button
  - a. Top three boxes in upper right should be checked:  
**Automatic column sizing, Allow in-cell editing** and **Show new item row.**
  - b. Under **Other** options, uncheck **Use compact layout**
  - c. Click **OK** to return to **Advanced View Settings: To-Do List** and click **OK** again to exit.



### To Change the Task Default Due Date

1. Right click on **Categories: (none)** in the To-Do List. (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. Save and close.
2. Select **Follow up.**
3. Select **Set Quick click.**
4. Select **No Date** from the dropdown and click **OK**.



### Creating a Category List in Outlook

1. Go to your **To-Do Bar** in the Calendar view.
2. Double click **Click here to add a new...** This will open a new task.
4. From the top ribbon in the task screen, select **Categorize**.
5. Select **All Categories** from the drop down list.
6. Save any categories that you are currently using and 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.

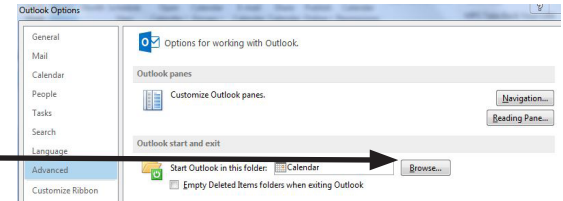
### To Categorize an Existing Appointment in Your Calendar

1. Right click on the calendar appointment you wish to color.
2. Click on the word **Categorize** in the 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. Click on the appropriate category box.

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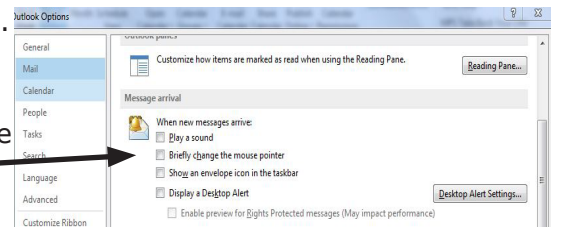
### Starting Outlook in the Calendar View (IMS View)

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 on the Outlook Options screen 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 task where you want to insert the document, hyperlink or e-mail.
2. Put your cursor into the body of the task 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 hyperlink to.
    - 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 in the top middle of the screen, select **Create New**.
4. Name your Quick Step – *Task/Delete*.
5. Click the dropdown arrow next to **Choose an Action**:
  - a. Select: Create a task with attachment
6. Select the **Add Action** button.
7. Click the dropdown arrow next to **Choose an Action**:
  - a. Select: Delete Message.
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 Parts*.
4. Select *Save Selection to Quick Part Gallery* at the bottom of the window.
5. Name the Quick Part template. Click **OK**.
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, select Quick Parts and select appropriate Quick Part to be entered into the e-mail.

McGhee Productivity Solutions provides consulting, training and coaching services and digital education to increase performance and work/life balance. Based in Denver, CO, McGhee integrates its proven methods and protocols with Microsoft software to deliver innovative action-management strategies to individuals, teams and organizations worldwide. From the boardroom to the knowledge worker, the McGhee approach maximizes technology investments, improves employee engagement and drives increased productivity and accountability inside the Fortune 500.

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