adapt

Recommended setup changes for Classic Outlook

SMART WORK

Introduction

If you're reading this, it's likely you will be attending or have recently attended a 'Smart Work' presentation, workshop, or webinar. Smart Work is all about enhancing personal productivity through the right daily habits combined with the smarter use of technology, in particular MS Outlook.

Using the Guide

This document describes all recommended 'Smart Work' set-up changes.

Depending on the 'Smart Work' program you attended, you may have completed some or all of the set-up changes already, perhaps as part of prework, and/or during the training itself. During presentation-style events, you may not have completed any of them, so please use this guide in whatever way assists you best.

MS Outlook Version

This guide is based on the Classic desktop version of MS Outlook. It is not suitable or applicable to people who use the 'new' MS365 version, the Mac version, or the version of Outlook downloadable on smart phones and iPads.

Printing These Set-Up Changes

While it's important to minimise the use of paper, please print this guide if it makes for easier reference as you complete the changes.

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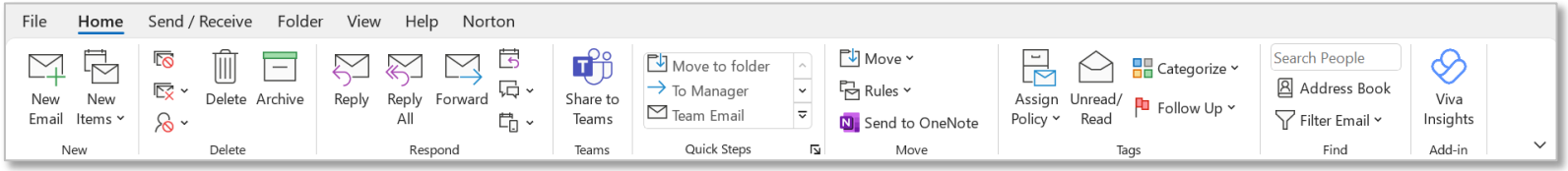
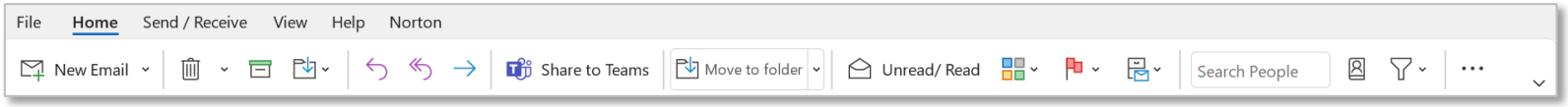
Using the Classic Ribbon

Some of the changes you are about to make involve working with the Outlook ribbon toolbar. The ribbon sits along the top of Outlook and is where all the relevant commands are listed. The ribbon can be viewed in two different ways – Classic or Simplified. We recommend using the Classic Ribbon to implement the Smart Work strategies.

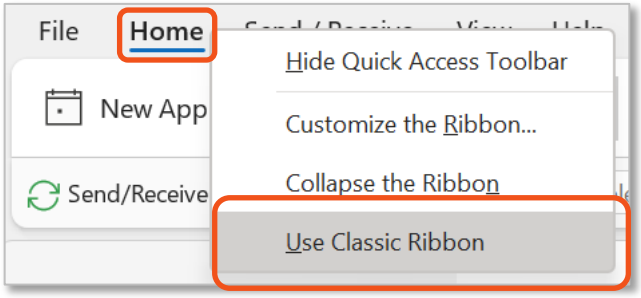
Classic Ribbon (when in the inbox in this example) – More of the commands are visible:



Simplified Ribbon (when in the inbox in this example) – Less of the commands are visible:



You will find it easier to complete the set-up changes, and apply the 'Smart Work' strategies, if you are using the **classic ribbon**. If you can see that your ribbon looks more like the 1st image, you don't have to do anything. If it looks more like the 2nd image, **right-click** on the **Home** tab, and choose **Use Classic Ribbon**:



Step One

1

Build your Daily Action Plan View

The Daily Action Plan view is the centrepiece of the ‘Smart Work’ program and is designed to be your go-to place for making decisions about how to spend your time and what activities to focus your energies through the day.

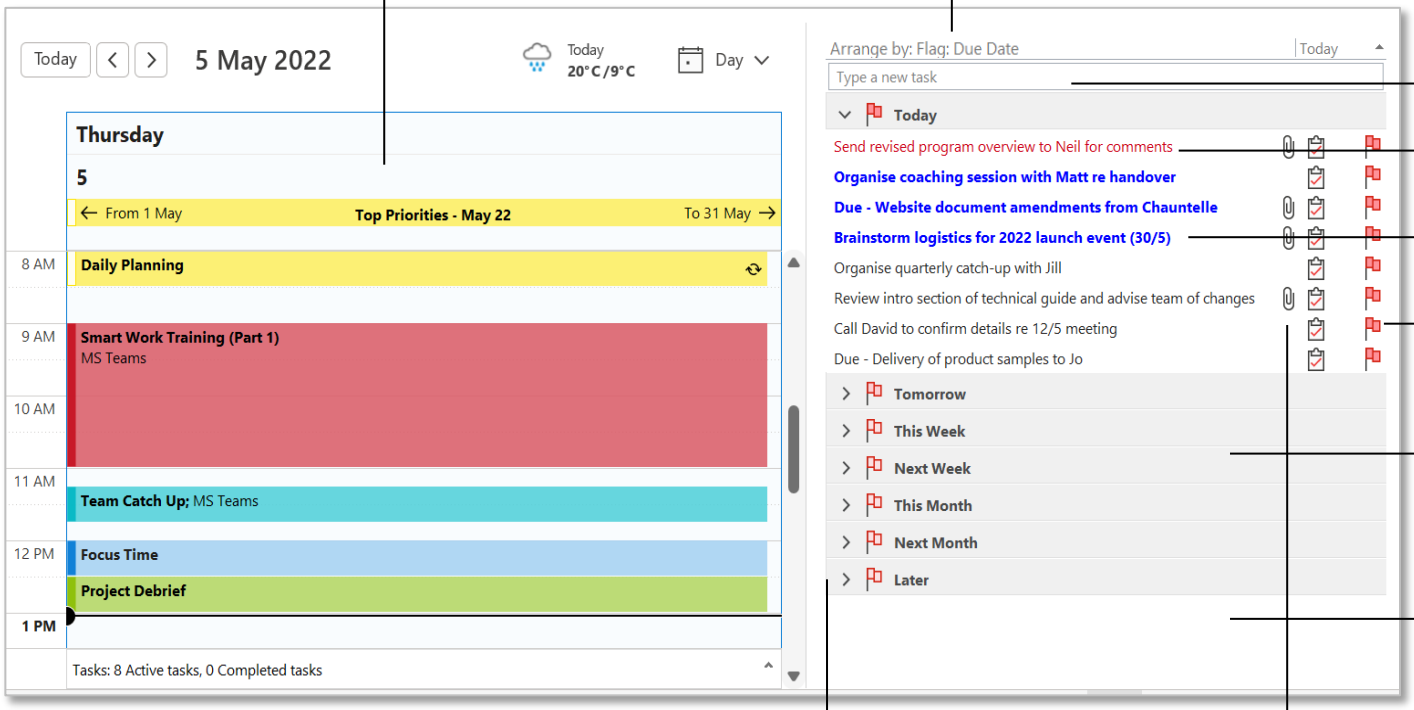
Pages 5-9 are all about creating this view.

Build Your Daily Action Plan View

One of the most important parts of the 'Smart Work' training is setting up and using your 'Daily Action Plan' view in Outlook. It combines your meetings/appointments AND your tasks in the one place and looks like the image below. The features that are in place once you have done the set-up changes are listed around the sides.

All meetings and appointments are in the calendar

Arrange your tasks in the to-do bar according to the date you plan to start working on them



Add tasks instantly by typing and entering them here

Overdue tasks will turn red and roll forward with you

High priority tasks will show up in a bold colour

Mark tasks complete by clicking on the flag

All your tasks, both for today and into the future, are listed in your to-do bar

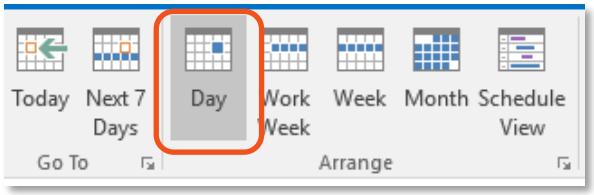
Double-click anywhere in the empty space to open a new task form

Expand the headings to see more tasks. Collapse to see less

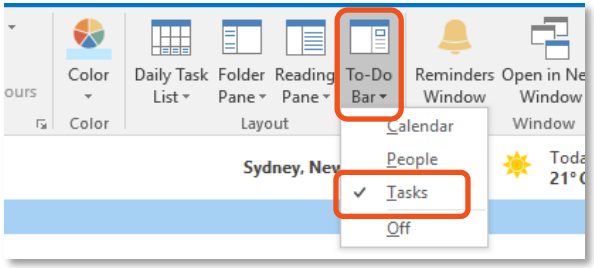
The paperclip icon tells you there is an email or other document attached to the task

Turning on the To-Do Bar

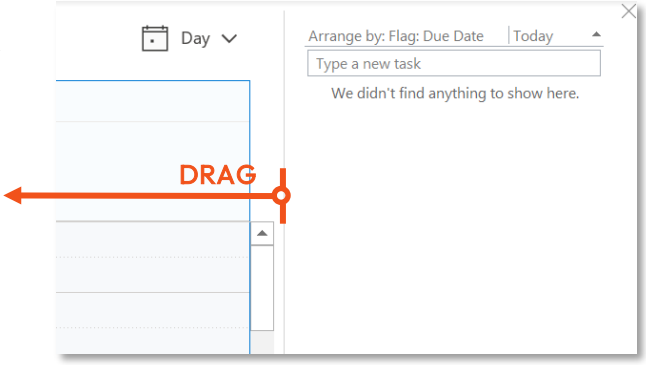
1. Go to your **Calendar**. On the **Home** tab, set your view to the **Day** view.



2. In your **Calendar,** go to the **View** tab, press the **To-Do Bar** button and tick **Tasks**. This will open your To-Do Bar to the right of your calendar.



3. **Resize the To-Do Bar** so that it is about twice as wide as the default, which is often quite narrow. Do this by **dragging the line** that separates the to-do bar from the calendar **to the left**. Please note, if you lose the words: *Arrange by: Flag...* at the top, you have made the to-do bar too wide and need to make it narrower.

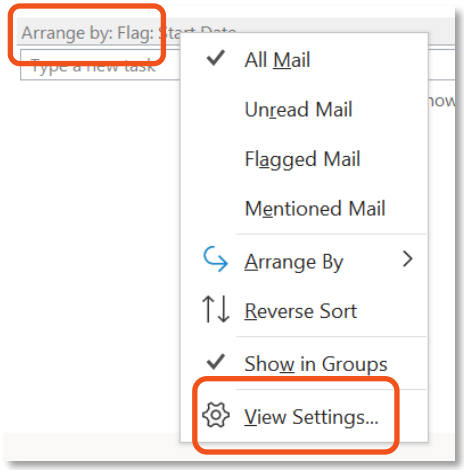


Build Your Daily Action Plan View

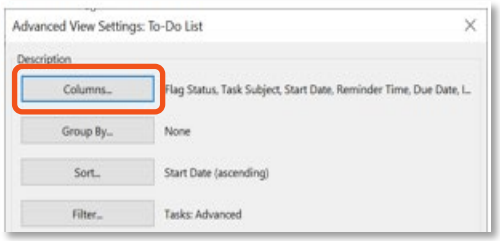
Formatting the To-Do Bar

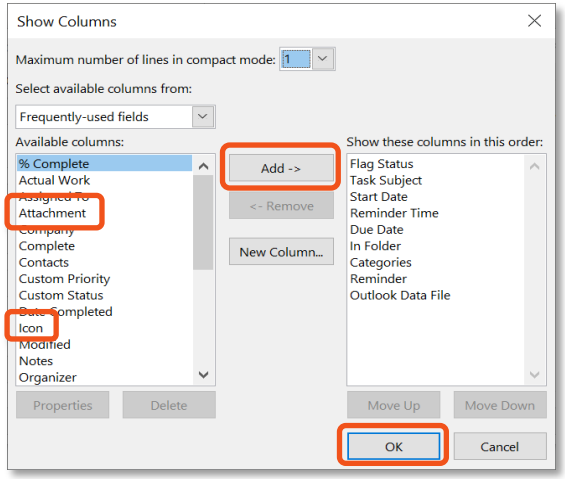
1. Check that you are in your **Calendar**. Check that the **To-Do Bar** is open on the right-hand side of your calendar.

2. Click on **Arrange By**, at the top of your **To-Do Bar**, and choose **View Settings**.



3. Press the **Columns** button.





4. Select **Attachment** in the left-hand column and press **Add**. *The attachment field displays a paperclip symbol if a task has an email in it.*

5. Select **Icon** in the left-hand column and press **Add**. *The icon field displays task symbols for all the tasks in your To-Do Bar.*

5. Press **OK** once only to return to the **Advanced View Settings** pane.

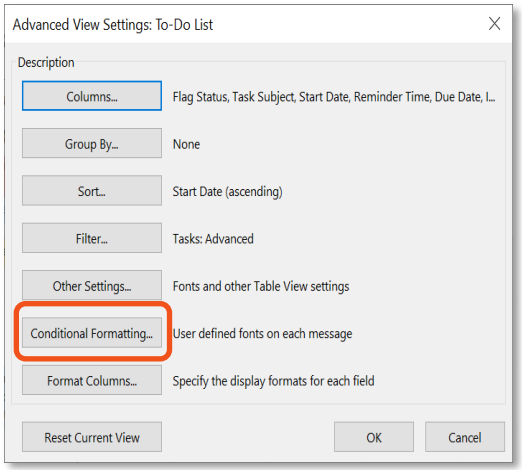
Continue from where you are using the instructions on the next page...

Setting Up a High Priority Rule in the To-Do Bar (Page 1 of 2)

The set-up changes below and on the next page describe how to create a rule so that any tasks you make a high priority will show up in a bold colour.

These instructions continue from the previous page, so you should have the **Advanced View Settings** pane on your screen as per the image below.

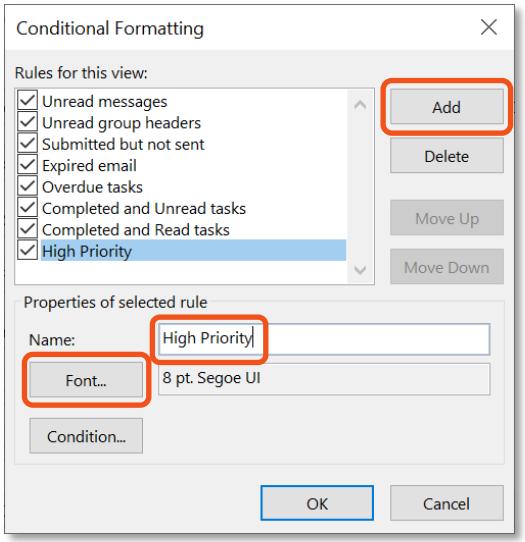
1. Click on the **Conditional Formatting** button.



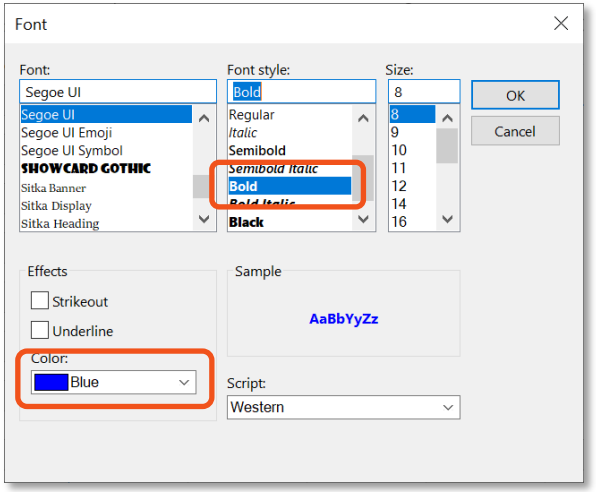
2. Press the **Add** button.

3. In the **Name** field, type the words *High Priority* over the top of *untitled*.

4. Press the **Font** button.



5. Set the colour and font style as shown in the screen shot below:



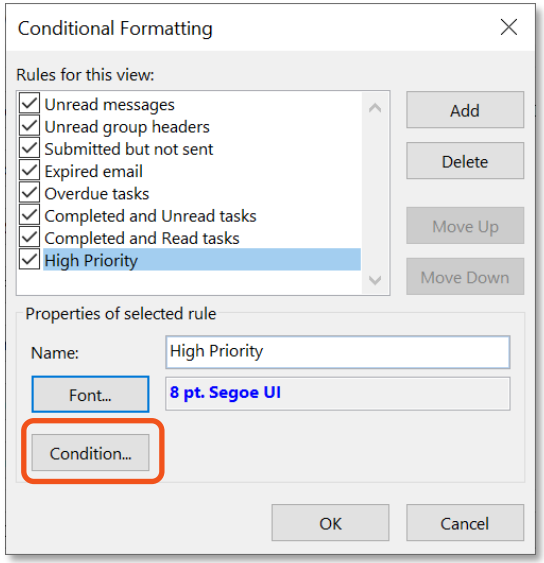
6. Press **OK** <u>once only</u>.

Continue from where you are using the instructions on the next page...

Setting Up a High Priority Rule in the To-Do Bar (Page 2 of 2)

These instructions continue from the previous page, so you should have the **Conditional Formatting** pane on your screen as per the image below.

7. Click on the **Condition** button.

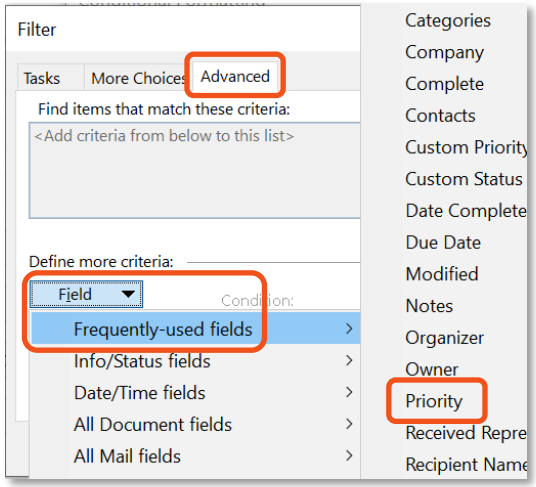


8. When the **Filter** screen opens, click on the **Advanced** tab.

9. Click on the **Field** button.

10. Scroll onto **Frequently-used Fields**.

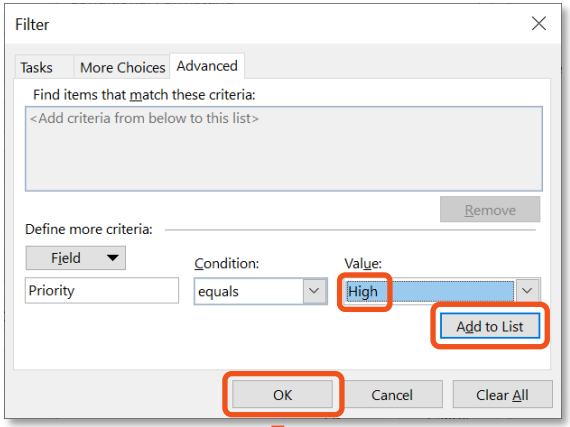
11. Choose **Priority** from the next menu that appears.



12. Change the **Value** field from **Low** to **High**.

13. Click on the **Add to List** button.

14. Press **OK three times** to return to your main screen.



3x

Your to-do bar is now set up.

Step Two

2

Turn on your Daily Task List View

This second view of your tasks, called the Daily Task List, is extremely useful when planning and organising your time. You can quickly open and close this list, which lives below your calendar. It is particularly useful when you want to see how your workload is allocated across the week.

Turn on the Daily Task List

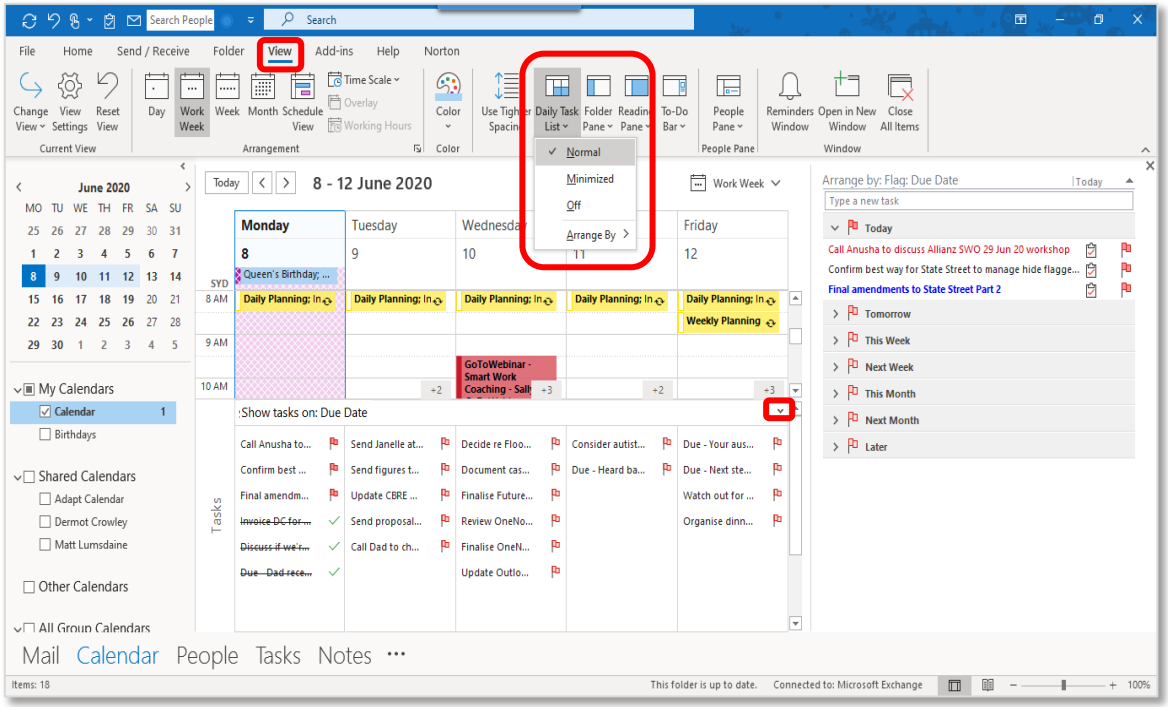
Your To-Do Bar to the right of your calendar is the best place to work with tasks on a day-by-day basis. However, the Daily Task List under your calendar is also helpful, especially when you need to view your tasks across the week, and in conjunction with your corresponding meeting commitments. In addition, the daily task list is where you can see your completed tasks. Required set-up changes are below.

Instructions

1. In your Outlook calendar, go to the **View** tab. Make sure you are in the day view, or one of the week views.

2. Press the **Daily Task List** button and choose **Normal** from the drop-down menu.

3. Close and open the daily task list anytime by clicking on the **down arrow** in the top right-hand corner of the daily task list.



Step Three

3

Create Email Action Quick Steps

Email Quick Steps are the fastest and easiest way to convert an email into a task or into an appointment. By creating the Quick Step buttons on the following pages, you will soon have your email actions under control!

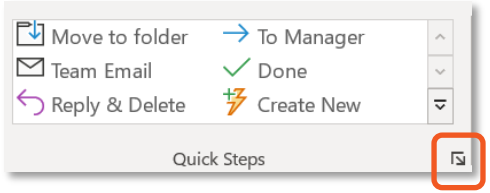
Clear the Quick Steps Toolbar

To make the Quick Steps Toolbar clean and easy to use, we suggest starting by deleting the existing 'example' Quick Steps that Microsoft have set up for you. You can then create a more useful bespoke email actions toolbar.

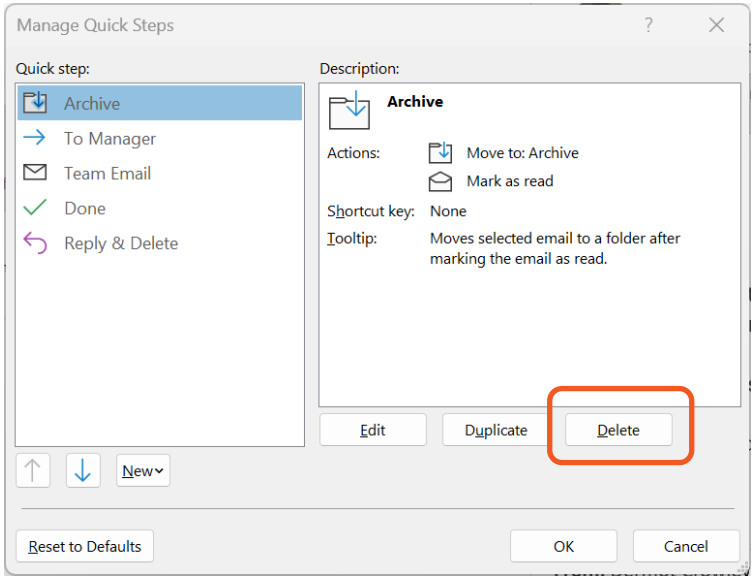
Instructions

1. In **Outlook**, go to your **Inbox.** You should be on the **Home** tab.

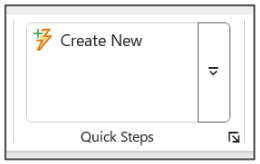
2. Locate the **Quick Steps** pane around the middle of the **Home** tab and click on the small arrow in the bottom right corner of the pane.



3. Press the **Delete** button in the **Manage Quick Steps** pane until all of the existing Quick Steps disappear.



4. Press **OK** and return to your Inbox. The **Quick Steps** pane should now only have one button – **Create New**.



Continue where you are using the instructions on the next page...

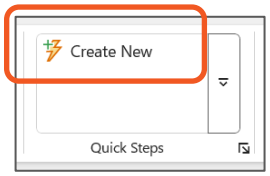
Build ‘Create Appointment’ Quick Step

Using Quick Steps, you can turn an email into a calendar entry with the touch of a button. And not only will it copy an entire email into a calendar entry, it will also file the original email if desired. Instructions for setting up a ‘Create Appointment’ quick step are listed below.

Instructions

1. In **Outlook**, go to your **Inbox.** You should be on the **Home** tab.

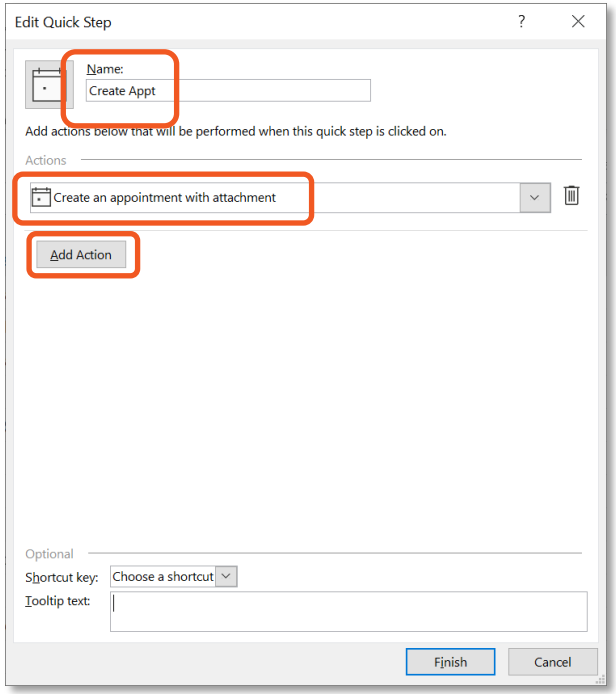
2. Locate the **Quick Steps** pane around the middle of the **Home** tab and choose **Create New**, as highlighted in the image below. If you can’t see it, click on the drop-down arrow also highlighted in the image below and you should find it there:



3. In the **Edit Quick Step** pane, name the quick step **Create Appt**.

4. Click on **Choose an Action** and select **Create an appointment with attachment** from the drop-down list. It is towards the bottom.

5. Check that your quick step looks the same as the image on the right and then press **Add Action**.



Continue where you are using the instructions on the next page...

Instructions, continued

6. Click on **Choose an Action** and select **Move to Folder** from the drop-down list. It's the first one in the list under **Filing**.

7. Click on **Choose Folder**.

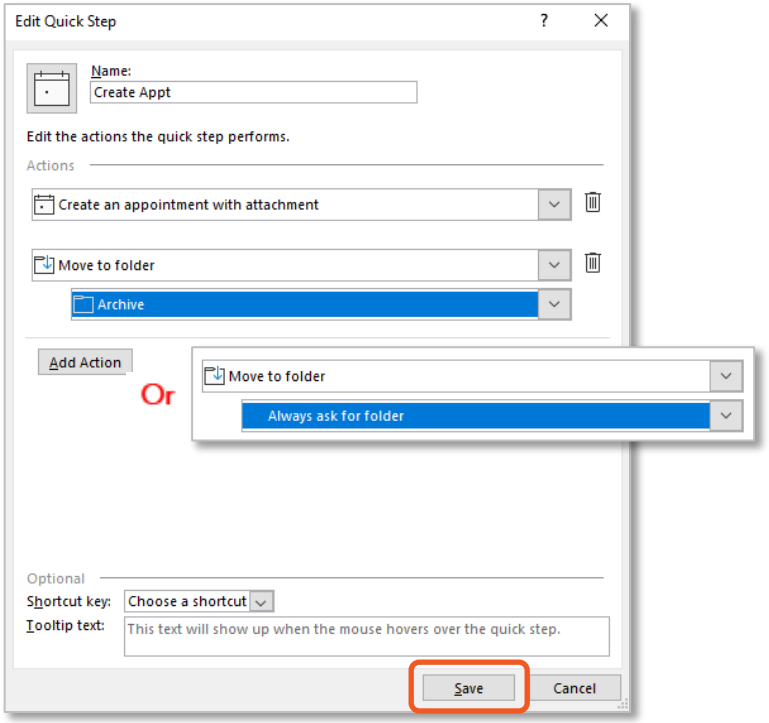
8. Now you need to make a choice:

   - If you plan to use only one general filing folder, like **Archive,** point to that folder, OR

   - If you use more than one filing folder and would like to be asked to make a filing choice each time, choose **Always Ask for Folder**.

9. Check that your **Create Appt** quick step looks the same as the screenshot on this page.

10. Press **Save**. Your **Create Appt** quick step is now ready to use.



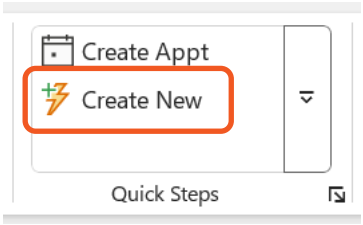
Build ‘Create Task’ Quick Step

On the previous pages were the instructions for creating a Quick Step to turn an email into an appointment. On the next two pages are the instructions for creating a quick step to turn an email into a task. And not only will it copy the email into a task, it will also file the original email.

Instructions

1. In **Outlook**, go to your **Inbox.** You should be on the **Home** tab.

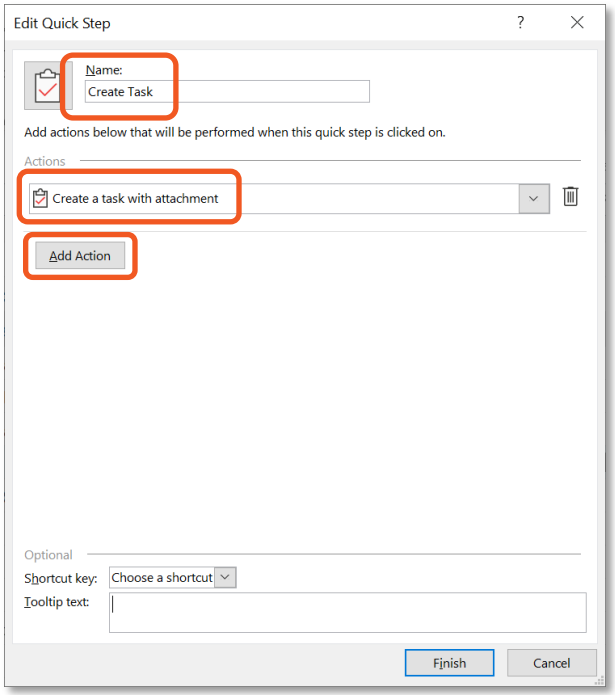
2. Locate the **Quick Steps** pane around the middle of the **Home** tab and choose **Create New**, as highlighted in the image below. If you can’t see it, click on the drop down arrow also highlighted in the image below and you should find it there:



3. In the **Edit Quick Step** pane, **Name** the quick step **Create Task**.

4. Click on **Choose an Action** and select **Create a task with attachment** from the drop-down list.

5. Check that your quick step looks the same as the image on the right and then press **Add Action**.



Continue where you are using the instructions on the next page...

Instructions, continued

6. Click on **Choose an Action** and select **Move to Folder** from the drop-down list. It's the first one in the list under **Filing**.

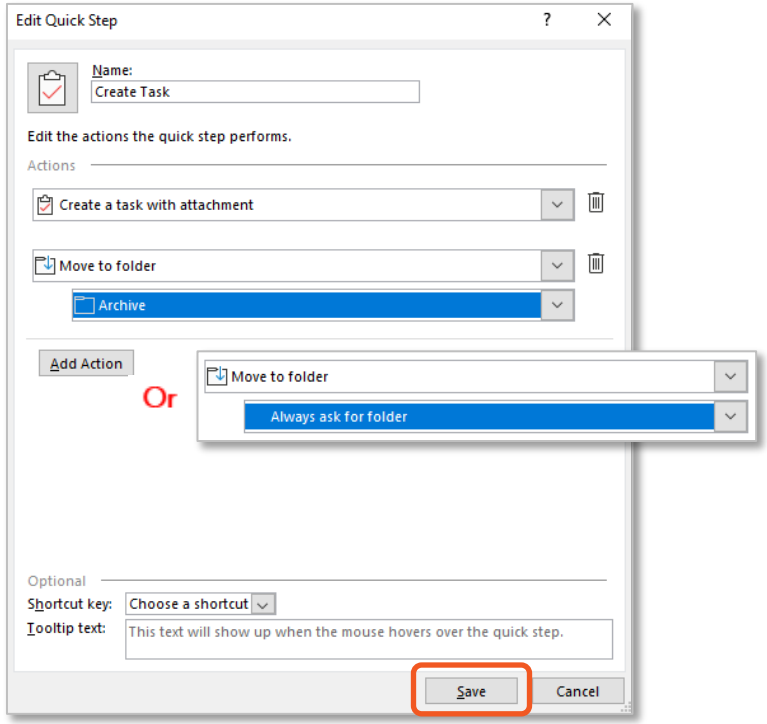
7. Click on **Choose Folder**.

8. Now you need to make a choice:

   - If you plan to use only one general filing folder, like **Archive**, point to that folder, OR
   - If you use more than one filing folder and would like to be asked to make a filing choice each time, choose **Always Ask for Folder**.

9. Check that your **Create Task** quick step looks the same as the screenshot on this page.

10. Press **Save**. Your **Create Task** quick step is now ready to use.



Step Four

4

Outlook System Changes

This final set of recommended changes will adjust how you navigate around Outlook and will dictate how Outlook behaves when you open the program or receive an email. Each of these changes subtly shifts your mindset and your behaviour.

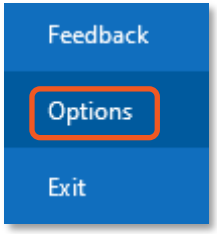
Turn Off Email Alerts

During your Smart Work training we recommend turning off your email alerts and checking your emails at times of your choosing instead. See instructions below for making this change.

Instructions

1. In **Outlook**, click on the **File** tab, in the top left-hand corner of your Outlook screen.

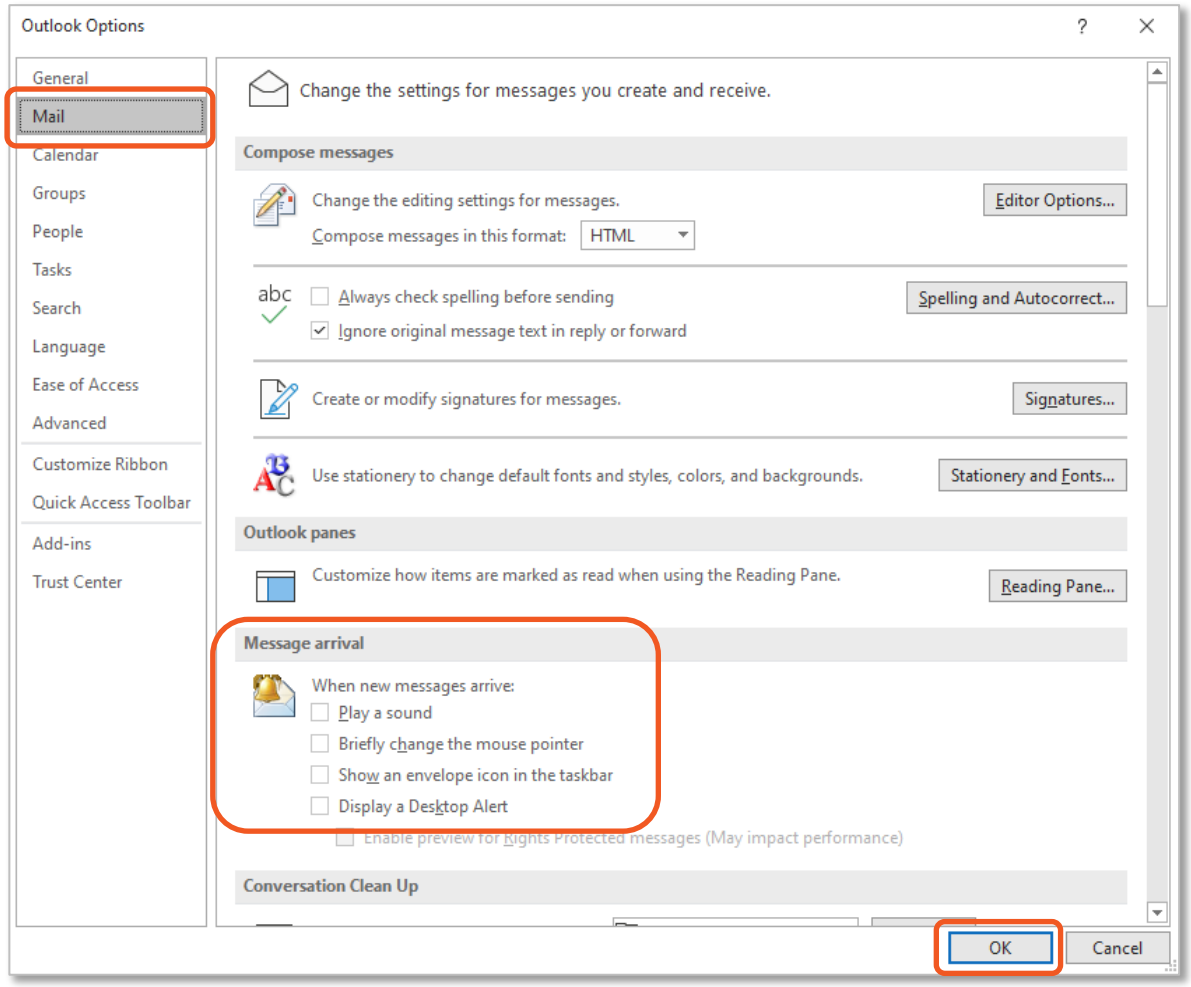
2. Choose **Options** from the drop-down menu.



3. When Outlook Options opens, go to the **Mail** tab.

4. Look for the heading **Message Arrival** and UNTICK the four tick boxes under **When new messages arrive**.

5. Press **OK** to save your changes.



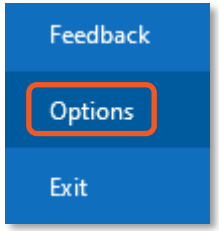
Make the Calendar your Home Screen

During your Smart Work training we recommend making the calendar your home screen, so that you step directly into your plan for the day, rather than all those unread emails. See instructions below for making this change.

Instructions

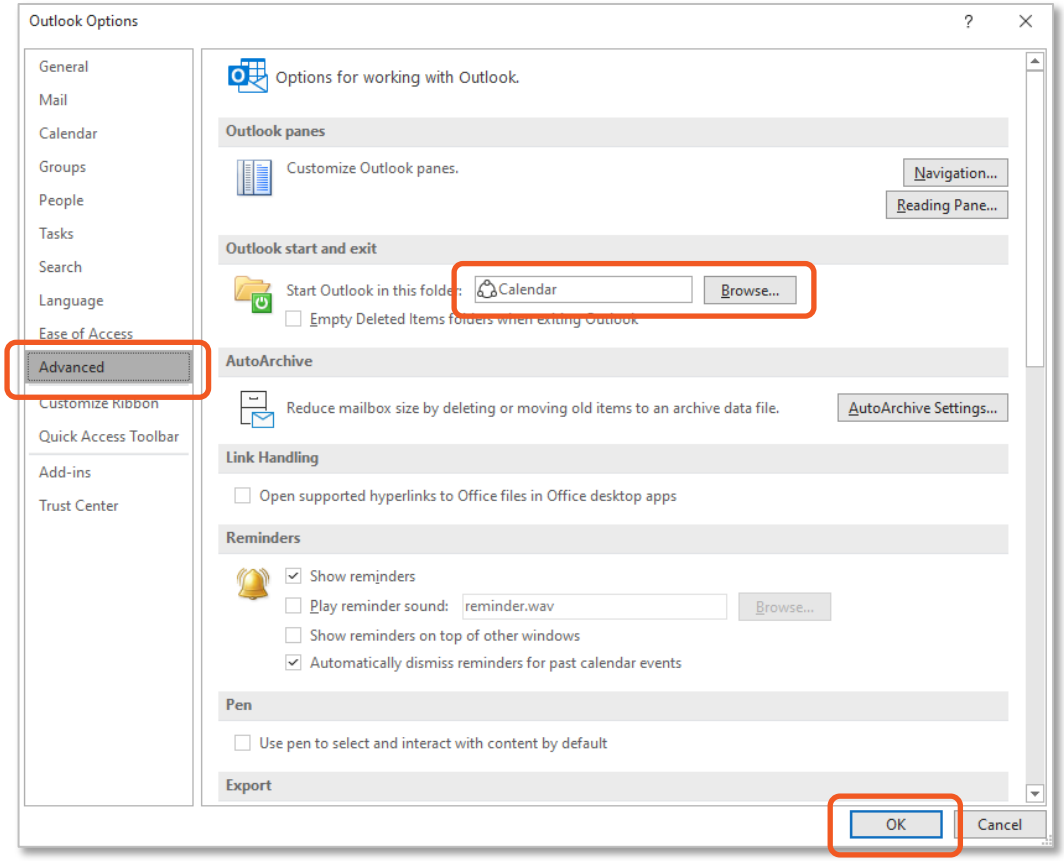
1. In **Outlook**, click on the **File** tab, in the top left-hand corner of your Outlook screen.

2. Choose **Options** from the drop-down menu.



3. When Outlook Options opens, go to the **Advanced** tab.

4. Where it says **Start Outlook in this folder**, press the **Browse** button. Find **Calendar** in the folder list and press **OK**. Press **OK** once more.



5. Almost there – final step. **Now close Outlook completely and reopen** to save all changes permanently in your mailbox.

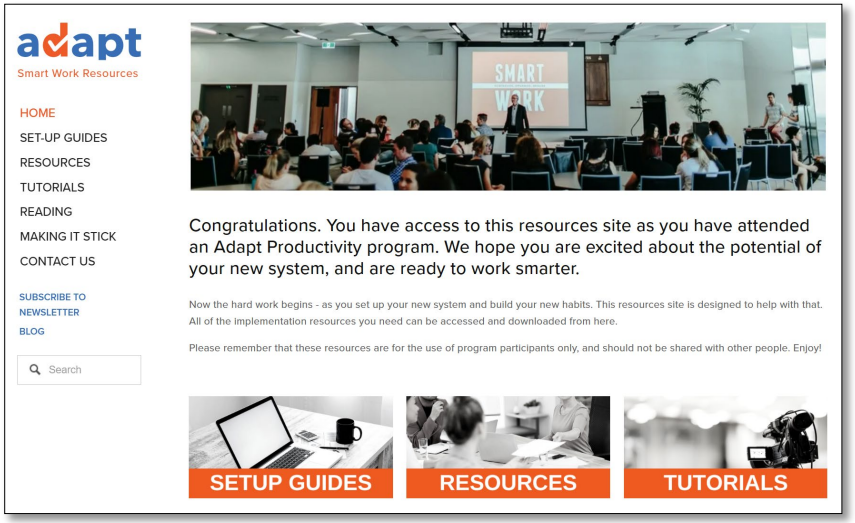
Further Resources & Congratulations!

Your MS Outlook is now set up in the 'Smart Work' way. Next, it's about applying all the principles and processes your learnt about during your training. For more participant-related resources, check out:

www.adaptresources.com.au
Password: zerohero

Here, you'll find:

- Outlook Set-up guide
- Outlook technical workbook
- Course handouts
- Videos, tutorials and more



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