

# Time Management Tips Using Outlook

## TIP #1 - Turn and E-Mail into What it Is

Avoid "Living in Your Inbox". E-mail serves one of four functions. It is either (1) something you need to do, (2) somewhere you need to be, (3) someone you talk to, or (4) a note.

So, when you get an e-mail IMMEDIATELY TURN IT INTO WHAT IT IS. Drag and drop the e-mail into either (1) a calendar entry, (2) a task, or (3) a contact. E-mail is not a filing tool. If you use it as such you bury your tasks in your inbox and you will not plan or keep track of what you need to do. Once you put the e-mail into your task list you can prioritize, categorize, and add other e-mails to it.

## TIP #2 - Adding to Calendar Entries

There is a "magic field" in every calendar entry where you can put documents needed for that appointment or meeting. That way you won't need to look for it. When in the calendar entry, click "Insert File" or "Insert Item". You can also drag items into this field...e-mails, documents, contacts, etc.

## TIP #3 - Color coding your inbox

You don't want a rainbow in your inbox, but color those things that rock and change your day. When in your inbox, go to the "VIEW" tab and click "VIEW SETTINGS" then "CONDITIONAL FORMATTING". Click "ADD" to add a new rule. Then click "FONT" and change the color. Click "CONDITION" then click "FROM". Enter the names of the people you want color-coded.

Click "FROM" again. Click "OK" three times. You can follow the same process to color code e-mails that are sent to you only. This may be helpful if you are copied on a lot of e-mails.

#### TIP #4 - Using the Rules Wizard

Create rules that will increase your productivity. Go to the "HOME" tab and click "RULES" then "CREATE RULE".

Some suggestions:

- Filter lower priority items directly into a folder. For example, you can create a rule where all newsletters sent by a particular organization go directly into a folder you set up for later reading. Select the e-mail you want moved automatically. Go to the "HOME" tab and select "RULES" then "CREATE NEW". Click "FROM" or "SUBJECT" to indicate the e-mails you want moved automatically. Then click "MOVE TO FOLDER" and select the appropriate folder. Click OK. The e-mails you selected will now never enter your inbox. They will be filtered automatically to the folder you designated.

(You can also create a quick step to do this manually with one click as the e-mails come in. To create the quick step, go to the "HOME" tab. In the "QUICK STEPS" section click "CREATE NEW". Name the quick step. Under "CHOOSE AN ACTION" click "MOVE TO FOLDER" and enter the folder you want.)

- Set up a rule to "red flag" or play an alert sound when messages arrive from someone who may require an immediate response.

#### TIP #5 - Set up your Master Task List

A Master Task Area is a place to keep an ongoing resource of what you need to work on, both professionally and personally.

1. On the "HOME" tab, click on "CATEGORIES".
2. Select "ALL CATEGORIES".
3. Create new categories or rename categories to correspond to your general areas of responsibility. To keep categories in a specific order, you may want to enter numbers such as "1 - Clients", "2 - Projects", etc. If more appropriate, use your roles such as "3 - Manager", "4 - Parent."
4. To sort your Master Task List by category, from the list of tasks select "VIEW SETTINGS" and then click "GROUP BY" and select "CATEGORY" ascending.

#### TIP #6 - Hide Completed Tasks

1. From the VIEW tab, select VIEW SETTINGS.
2. Click the FILTER button
3. In the FILTER dialogue box, click the ADVANCED tab.
4. Click the FIELD tab on the left side of the box, then select FREQUENTLY USED FIELDS, then select COMPLETE and write complete = NO.
5. Click ADD TO LIST.
6. Click OK.

If you need to retrieve your completed tasks, repeat the above process, but when you get to the box, select "REMOVE" to remove the rule. Your completed tasks will reappear on your task list.

#### TIP #7 - Use the Master Task List to create a prioritized Daily Task List

Go to the Calendar and select "VIEW then "DAILY TASK LIST" and select "NORMAL". You will see all task due today, all tasks with no due date and all e-mails with a "follow-up" flag.

On the view tab, you can manage your task list to the right of your e-mail by clicking on the "TO DO BAR". You have several choices in how you can change your task pad into a Prioritized Daily Task List. Here are some suggestions:

1. You can drag tasks into today's date on the calendar.
2. You can sort tasks by due date or priority.
3. You can simply write the tasks for the day on a piece of paper.

Everyone develops their own systems for creating a daily to-do or task list. Use the system that works for you.

#### TIP #8 - Have Outlook Start Up in Tasks (or calendar) instead of your inbox.

Discipline yourself to live by your task list on not your inbox. Go to the "FILE" tab and select "OPTIONS". Click on "ADVANCED" and look at "OUTLOOK START IN THIS FOLDER" and select either Calendar or Tasks as the default view when Outlook opens.

## TIP #9 - Turn off E-Mail Notifications

Stopping to react to e-mails as they come in is poor time management. Help resist this temptation by turning off your automatic notification function. Go to the "FILE" tab and select "OPTIONS". Select "MAIL" and uncheck all boxes under "When New Items Arrive in my Inbox."