

Outlook Productivity: Office 2010 for Windows Computers

Planning

Remember, tasks and appointments can be made easily using drag and drop! Simply drag a task or email to the calendar to display the appointment window. You can also create a task by dragging an email to your task list.

Creating categories

1. On the Home tab, click the arrow underneath Categorize
2. Select All Categories
3. Rename existing categories or create new ones as needed

Creating custom fields in tasks

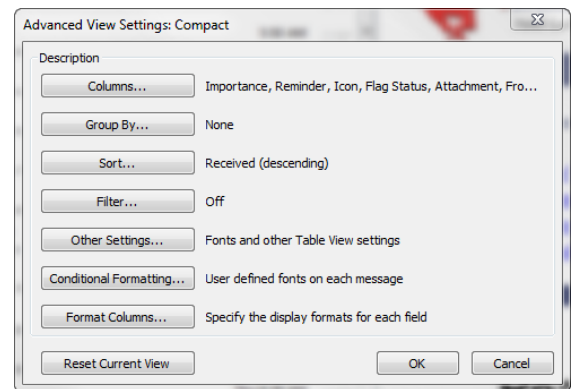
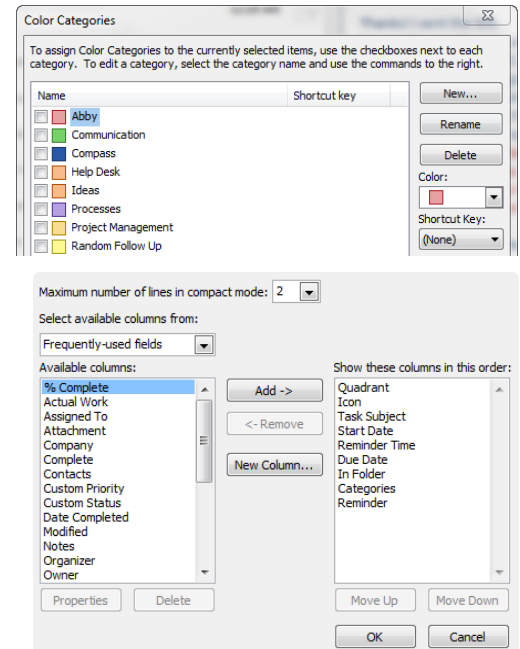
1. Open your task list
2. Right click on the column headers
3. Select View Settings
4. Click Columns
5. Click New Column
6. Set the column name and data type
7. Adjust the location of the field
8. Click OK

Modifying view settings

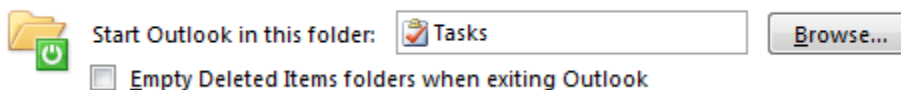
1. Click the appropriate tab (Mail, Calendar, Task, etc.)
2. Click the View tab
3. Click Change views to see different formats already built
4. Click View Settings to modify the current view
5. Change sorting, grouping, filtering options and more

Open In tasks rather than inbox

1. Click the File Menu
2. Click Options
3. Click Advanced
4. In the Outlook start and exit section, Click Browse
5. Select Tasks
6. Click OK



Outlook start and exit



Minimize distractions

Remember, the average person gets one interruption every 8 minutes. Of those, 80% are a complete waste of time!

Turn off Desktop Alerts

1. Click File
2. Click Options
3. Click Mail
4. Under Message Arrival, uncheck all options

Create alerts

1. Click File
2. Click Manage Rules and Alerts
3. Click New Rule
4. Select "Display mail from someone in the New Item Alert Window"
5. Click the link to "people or group"
6. Specify the individual(s)
7. Click the link to "specific message"
8. Enter your custom message for the alert
9. Click Next (enter additional criteria if needed)
10. Click Finish

Create a rule from a message

1. Right click on the message
2. Select Rules--- Create Rule
3. Select the criteria
4. Click OK

Other tips

- Unsubscribe from newsletters, advertisements etc. or create rules for these items in particular
- Use RSS feeds for news sites and journals
- Use a non-business email address for online shopping/registrations
- Check email during specified windows—not all day long.

Processing mail

Creating New Folders

1. Right click on the Inbox
2. Select New Folder
3. Name the folder
4. Select the location for the folder
5. Click OK

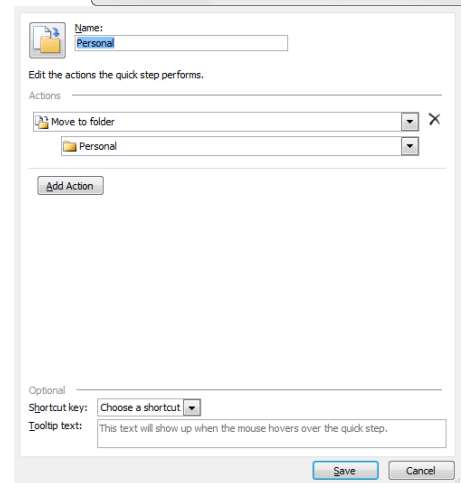
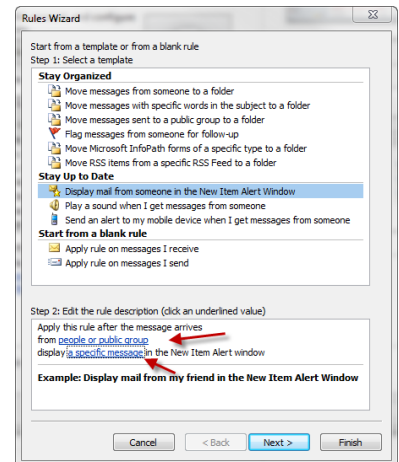
*Remember, you don't need a lot of folders. Simplify with just a few folders and then utilize the Search capabilities in Outlook.

Message arrival



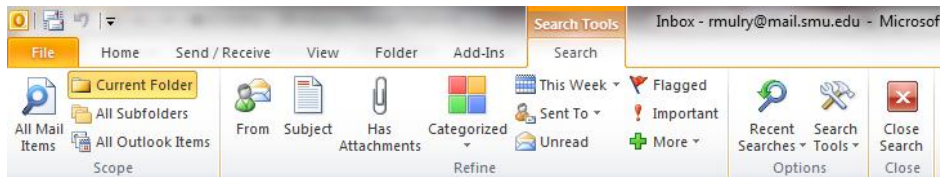
When new messages arrive:

- ☐ Play a sound
- ☐ Briefly change the mouse pointer
- ☐ Show an envelope icon in the taskbar
- ☐ Display a Desktop Alert



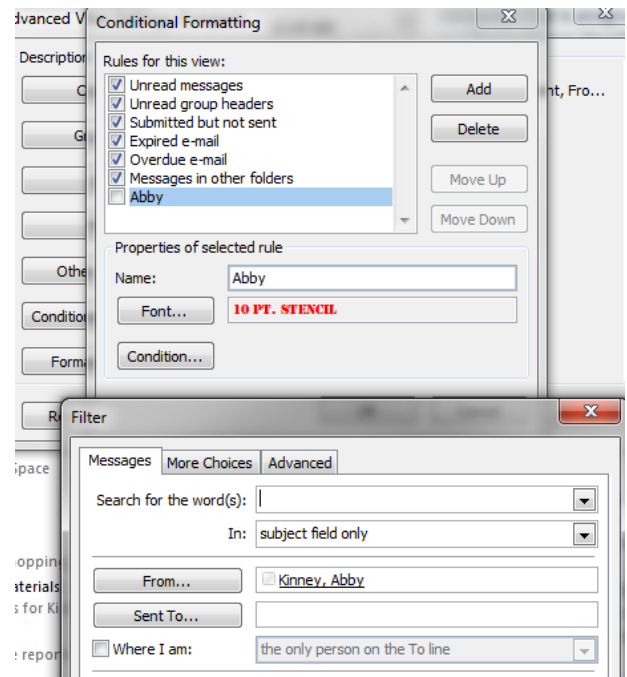
Searching

1. Click the search bar above the contents of your inbox
2. Enter your search criteria. An additional toolbar appears allowing you to quickly add criteria such as from, with attachment, etc.
3. By default, it will search the current folder. Simply click All Outlook items to expand the search to your entire mailbox.



Conditional formatting

1. Go to your mail, task, calendar or contact section
2. Right click on the column headings and select View Settings
3. Select Conditional Formatting
4. Click Add
5. Specify the font type, size and color
6. Click the Condition button
7. Specify the condition
8. Click OK
9. Click OK



Quick Steps

1. Click the Home Tab and locate the quick Steps section
2. Click Create New
3. Enter a name for the quick step
4. Choose an action (or multiple actions)
5. Click Finish

Conversation View

1. From the Mail screen, click on the View tab
2. Click Show as Conversations
3. Apply the view to either the inbox only or all folders
4. If you move/delete the top message, it will move all related messages at the same time. You can also right click and select Ignore. This will route all related messages and future incoming related messages to the deleted items folder automatically!

Remember the 4 Ds--- Delete, Do It, Delegate It, or Delay It

Online Training

- <http://office.microsoft.com/en-us/support/training-FX101782702.aspx>