



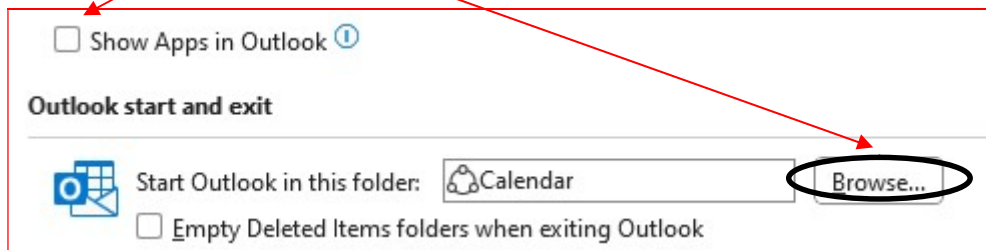
Outlook Customisations

Microsoft Outlook has great functionality to help you regain control and increase your Productivity, but you need to customise it to make it easier to use.

General Options

a) CHANGE APP ICONS TO BOTTOM & START IN CALENDAR

- I. Click **File** tab, click **Options**
- II. In the subsequent dialogue box, Click the **Advanced** tab on the left side
- III. Uncheck **Show Apps in Outlook**
- IV. Using the **Browse** button, change the Start Outlook in this folder field to **Calendar**. Click **OK** to exit Options and you'll be prompted to restart Outlook

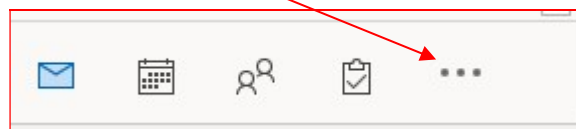


b) TURN OFF MAIL INTERRUPTS [OPTIONAL]

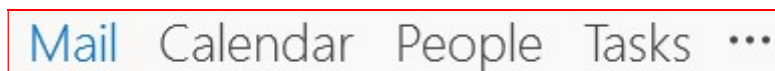
- I. Click **File** tab, click **Options**
- II. In the subsequent dialogue box, Click the **Mail** tab on the left side
- III. In the **Message Arrival** section, uncheck all 4 boxes
- IV. Click **OK** to exit Options

c) TURN OFF COMPACT NAVIGATION

To make switching easier between the different Outlook databases, turn off **Compact Navigation**. Click the **ellipses** (3 dots) in the bottom left corner of the Outlook screen and select **Navigation Options** from the menu



In the subsequent dialogue box, uncheck **Compact Navigation**. The Data folders will now be displayed by Name.

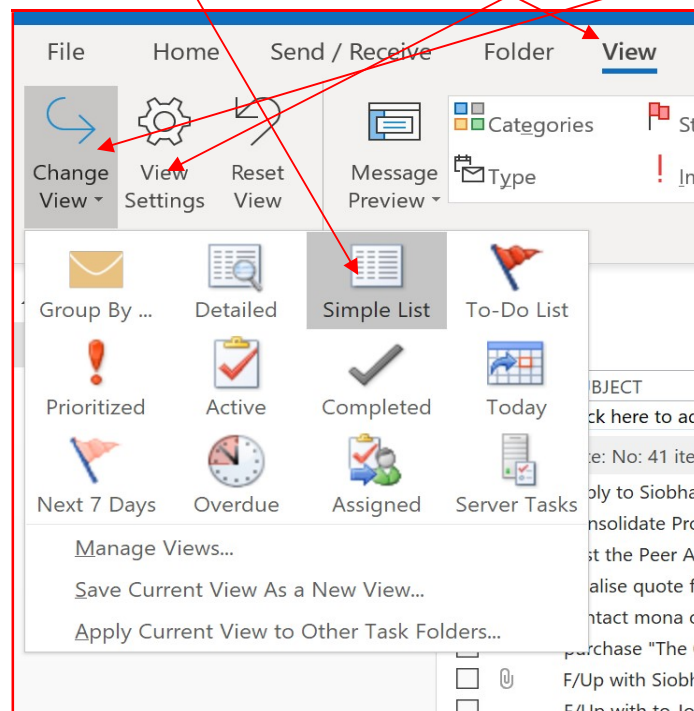


Task Folder Options – Simple List

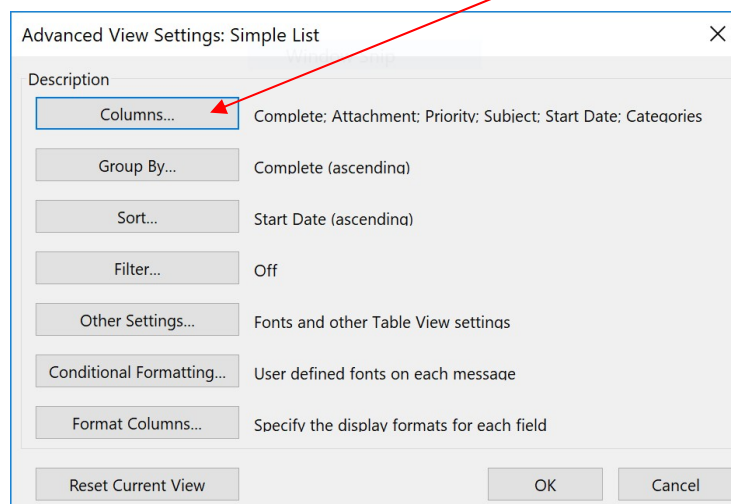
Go to **TASKS** folder. If you didn't switch off Compact Navigation in the previous step, click the **Tick** icon at the bottom left of the screen



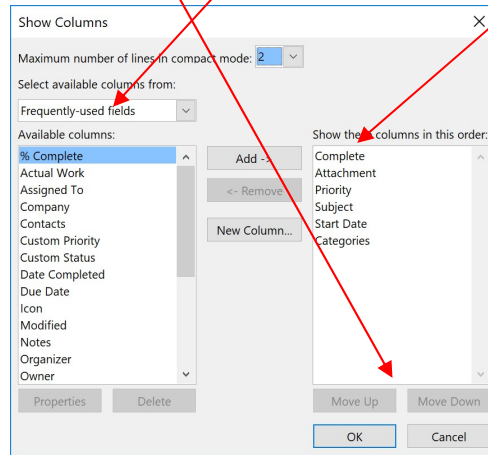
- I. In the **Tasks** folder, and click the **View** tab, then click the **Change View** icon and select **Simple List**. Next click the **View Settings** icon



- II. In the subsequent dialogue box, click the **Columns** button



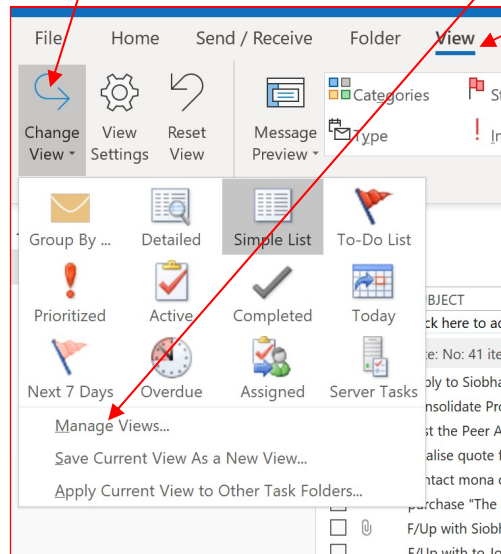
- III.** Remove all entries from the right half window by double mouse clicking each one. Then by selecting from **Frequently-used fields**, add the following fields to the right by double mouse clicking each on the left (**Complete, Attachment, Priority, Subject, Start Date, Categories**). The order can be corrected using the **Move Up/Down** buttons. Click **OK**



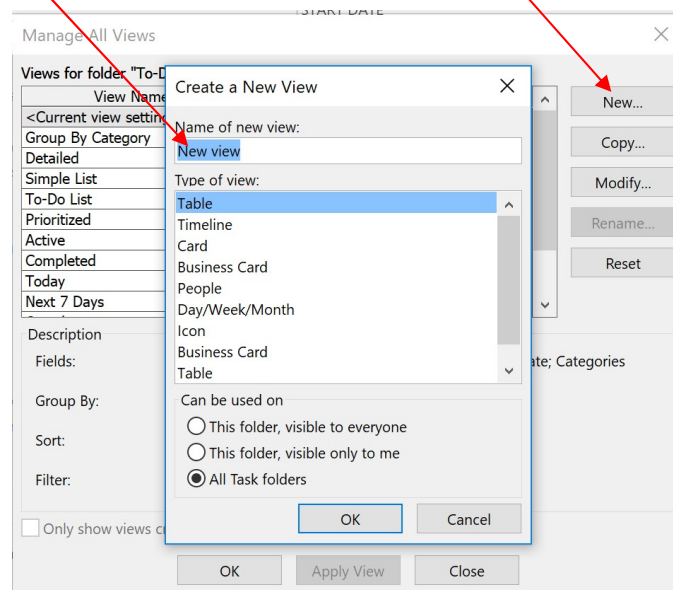
- IV.** Click the **Group By** button and uncheck **Automatically group according to arrangement** and in the **Group items by** field, select **Complete** [Not % Complete]. Then click **OK**
- V.** Click the **Sort...** button and in the **Sort items by** field select **Start Date**. Then click **OK**. This view sorts all your Tasks into groups – those that still active and those that are completed.

TASK FOLDER OPTIONS – GROUP BY CATEGORY

- I. It is possible to set up your own views in MS Outlook™ and we recommend one called **Group by Category**. In the **Tasks** folder, and click the **View** tab, then click the **Change View** icon and select **Manage Views**.



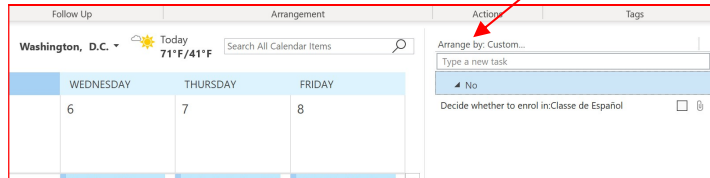
- II. In the subsequent dialogue box, click the **New** button. In the next box, type **Group by Category**. Then click **OK**



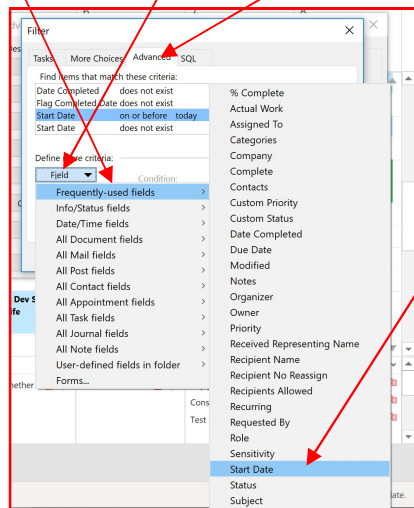
- III. In the subsequent dialogue box, click **Group by** button and in the **Group by** field select **Categories**. Before clicking **OK**, in the bottom right corner change the **Expand/collapse defaults** field to **All collapsed**. Then click **OK**.
- IV. Click the **Sort...** button and set **Sort items by** to **Complete**. Then click **OK** [Click **Yes** if prompted to add displayed field]
- V. Click the **Filter** button and in the bottom right of the next box, click **Clear All**. Then click **OK**. Click **OK** twice more until the dialogue boxes disappear.

CALENDAR FOLDER OPTIONS – TO DO BAR

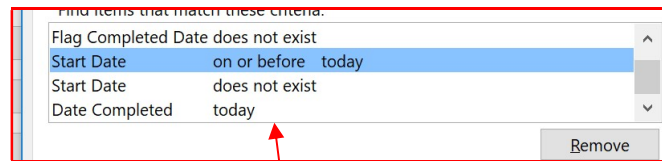
- I. Go to **Calendar** and Click the **View** tab. Click the **To Do Bar** icon and ensure only **Tasks** are selected
- II. The **To Do Bar** will appear on the right side of the screen. Right mouse click at the top where it says **Arrange by:** and from the menu select **View Settings**



- III. Select the **Columns** button and remove the fields from the right side by double clicking each one. Then from the left side, ensure you are selecting from **Frequently Used Fields** and double click **Subject**, **Start Date**, **Priority**, **Attachment**, **Complete** so they appear on the right side in that order.
- IV. Then click the **Group by** button and uncheck **Automatically group according to arrangement** and in the **Group items by** field, select **Complete** [Not % Complete]. Then click **OK**
- V. Next click the **Sort...** button and in the **Sort items by** field, select **Priority**. Then click **OK**
- VI. Next click the **Filter** button and select the **Advanced** tab. In the next dialogue box, click the **Field** button. From the menu, select **Frequently Used Fields** and from the next menu select **Start Date**.



- VII. In the **Condition** field, select **on or before** and in the **value** field, type the word **'today'** and then click the **Add to List** button



- VIII. Using the same technique add two more filters. Click the **Field** button and **Frequently Used Fields** select
- i. **Start Date** with the **Condition** field **does not exist** (Click **Add to List**)
 - ii. **Date Completed** with the **Condition** field **Today** (Click **Add to List**)
 - iii. The 3 new filters should be listed as above. Then click **OK**
- IX. Click the **Other Settings** button and in the next dialogue box, uncheck the field **Use Compact layout in fields smaller than xxx characters**. Then click **OK** twice to exit.

CALENDAR FOLDER OPTIONS – DAILY TASK LIST

- I. Go to **Calendar** and click the **View** tab. Click **Daily Task List** and select **Normal**. Click **Daily Task List** again and select **Arrange By** and change to **By Start Date**
- II. This shows the **Tasks** scheduled for each day at the bottom of the Calendar screen

