

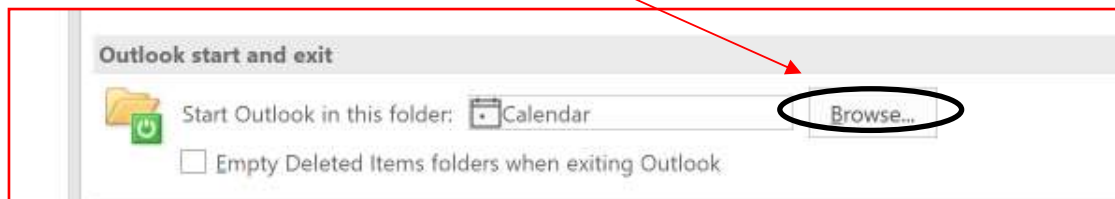
1.0 Outlook Customisations

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

Note: The Customisation Steps in this section are for Microsoft Outlook 2016 or later.

a) CHANGE YOUR DEFAULT VIEW

- I. Click **File** tab, click **Options**
- II. In the subsequent dialogue box, Click the **Advanced** tab on the left side
- III. Using the **Browse** button, change the Start Outlook in this folder field to **Calendar**
- IV. Scroll down and uncheck 'use animations when expanding conversations and groups' and click **OK**

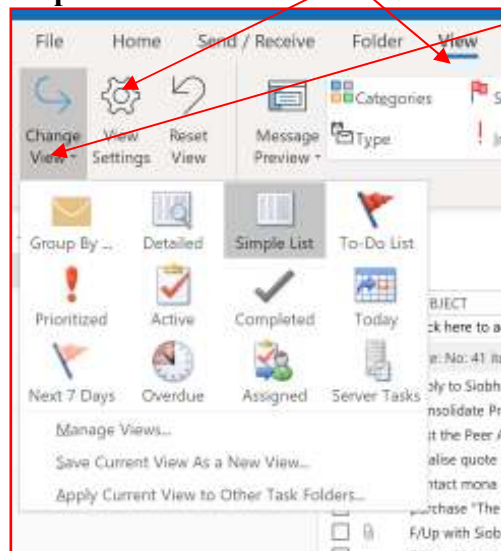


b) TURN OFF MAIL INTERRUPTS [OPTIONAL]

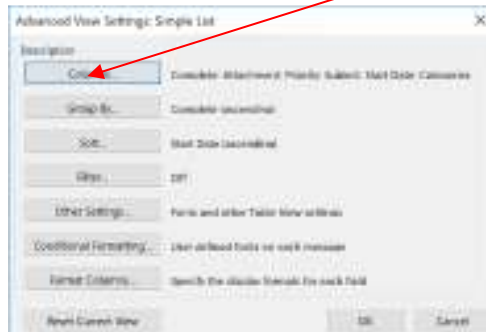
- I. Click **File** tab, click **Options**
- II. In the subsequent dialogue box, Click the **Mail** tab on the left side
- III. In the **Message Arrival** section, uncheck all 4 boxes. Click **OK**

c) CUSTOMISE TASK FOLDER – SIMPLE LIST

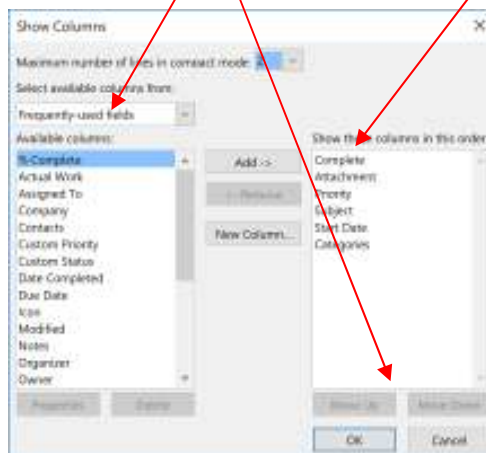
- I. Go to the **Tasks** folder, and click the **View** tab, then click the **Change View** icon and select **Simple List**. Next click the **View Settings** icon



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



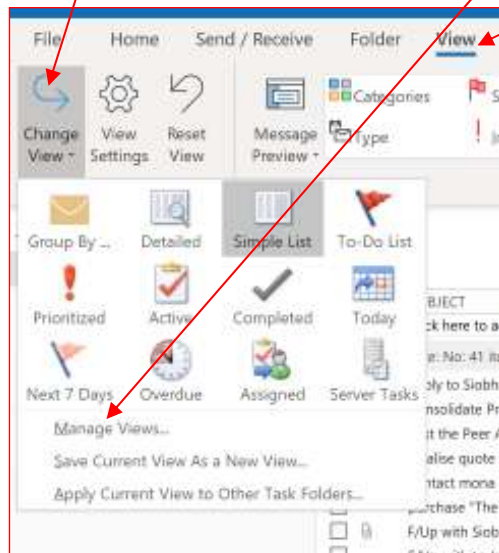
- III. Remove all entries from the right window by double mouse clicking each one. Then by selecting from **Frequently-used fields**, add the following fields to the right by double mouse clicking each on the left (**Complete, Attachment, Priority, Subject, Start Date, Categories**). The order can be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



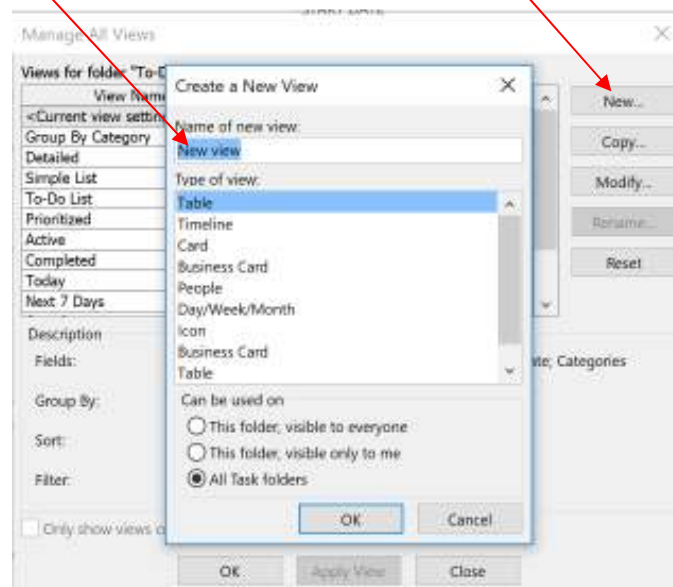
- IV. Click the **Group By** button and uncheck **Automatically group according to arrangement** and in the **Group items by** field, select **Complete** [Not % Complete]. Then click **OK**
- V. Click the **Sort...** button and in the **Sort items by** field select **Start Date**. Then click **OK**.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

d) CUSTOMISE TASK FOLDER – 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**. The click **OK**

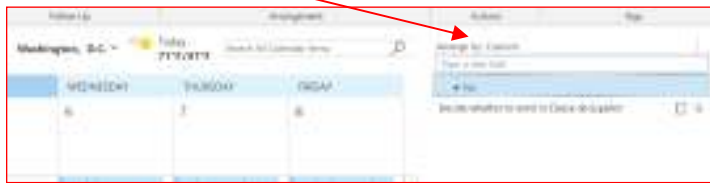


- III. In the subsequent dialogue box, click **Group by** button and in the **Group by** field select **Categories**. Before clicking **OK**, in the bottom right corner change the **Expand/collapse defaults** field to **All collapsed**. Then click **OK**.
- IV. Click the **Sort...** button and set **Sort items by** to **Complete**. Then click **OK**

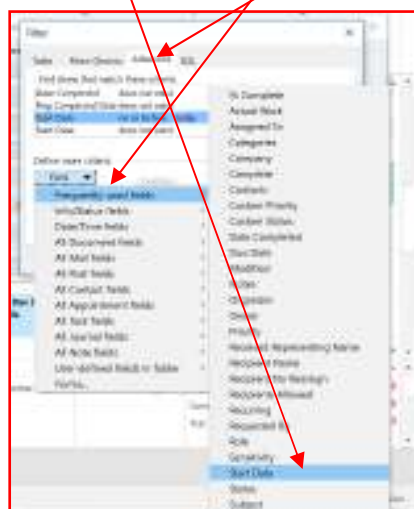
- V. Click the **Filter** button and in the bottom right of the next box, click **Clear All**. Then click **OK**. Click **OK** twice more until the dialogue boxes disappear.

e) CUSTOMISE TASKS IN CALENDAR – TO DO BAR

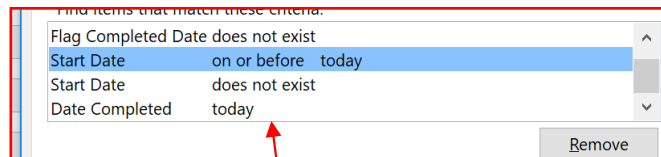
- I. Go to **Calendar** and Click the **View** tab. Click the **To Do Bar** icon and ensure only **Tasks** are selected
- II. The **To Do Bar** will appear on the right side of the screen. Right mouse click at the top where it says **Arrange by:** and from the menu select **View Settings**



- 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. There should be two filters already set. Add three more, by clicking 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 **Add to List** button



- VIII. Using the same technique add the filters, click the **Field** button and 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 xx characters**. Then click **OK** twice to exit.

f) CUSTOMISE TASKS IN CALENDAR – 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

