

Outlook for Packrats

Keeping Your Stuff without Losing Your Mind

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My Credentials

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Principles of *Outlook for Packrats*

Focus on Tasks rather than Email

With some intention and self-discipline, at first. It gets easier!

Use a triage system to prioritize and process

Handle each email as few times as possible.

Keep actionable tasks in view; all others within easy reach

You never know when it might come in handy

Get to “In-box ZERO”

(Or something very close to it)

Three Steps of *Outlook for Packrats*

Launch from **TASKS**

Systematic **PROCESSING**

Organize by **CATEGORIES**

Tasks

Using Tasks in Outlook

Integrates easily with Email and Calendar

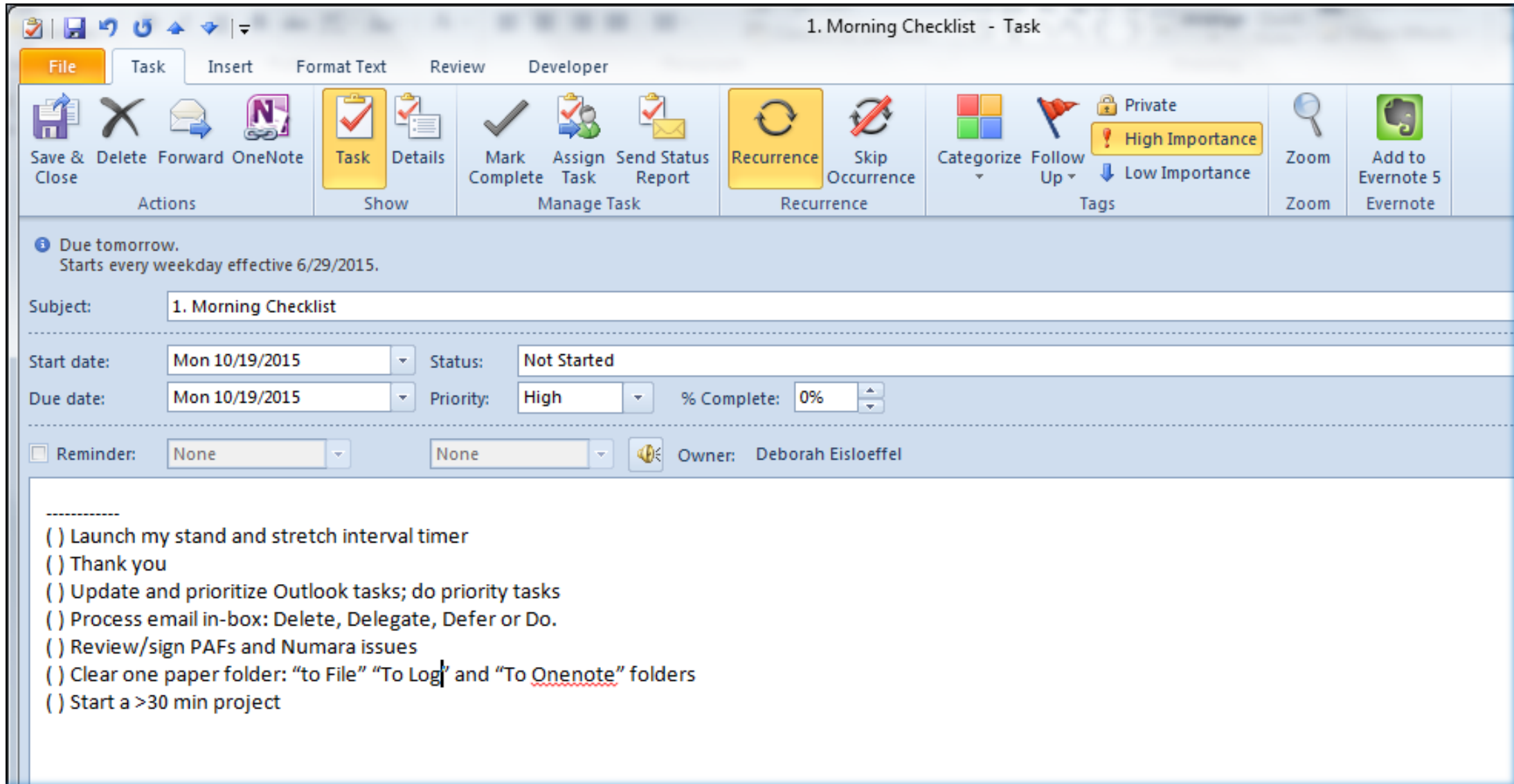
- Drag email to “Calendar” or “Task” links at bottom of screen to copy/convert it
- Use Follow-up Flags on email – the item appears in your “To Do” list **OR**
- I prefer to create a task from an email, which allows for managing with all task features: status, priority, etc.

Away from desk (no tasks on iphone): email to self, later convert to Task

Assign to others (for me, a future possibility)

Set Tasks as the default folder – Outlook opens to that instead of Inbox

Create Task “Checklists” - Daily repeating chores in a single Task



The screenshot displays the Microsoft Outlook interface for a task titled "1. Morning Checklist". The ribbon at the top includes tabs for File, Task, Insert, Format Text, Review, and Developer. The Task ribbon is active, showing various icons for task management such as Save & Close, Delete, Forward, OneNote, Task, Details, Mark Complete, Assign Task, Send Status Report, Recurrence, Skip Occurrence, Categorize, Follow Up, Tags (High/Low Importance), Zoom, and Add to Evernote 5.

Task details include:

- Due tomorrow. Starts every weekday effective 6/29/2015.
- Subject: 1. Morning Checklist
- Start date: Mon 10/19/2015
- Due date: Mon 10/19/2015
- Status: Not Started
- Priority: High
- % Complete: 0%
- Reminder: None
- Owner: Deborah Eisloeffel

The task body contains a checklist of daily chores:

- () Launch my stand and stretch interval timer
- () Thank you
- () Update and prioritize Outlook tasks; do priority tasks
- () Process email in-box: Delete, Delegate, Defer or Do.
- () Review/sign PAFs and Numara issues
- () Clear one paper folder: "to File" "To Log" and "To Onenote" folders
- () Start a >30 min project

Processing

Use Rules to manage emails BEFORE they get to your in-box

See Cheat Sheet for more info

Process email 2-3 x day – on *your* schedule - turn off alerts!

To Process: Follow the 4 Ds to conduct triage:

- **Delete** –
- **Delegate** – is this really meant for you? Delegate, then delete or assign Category and Archive it
- **Defer** – Assign a Category and Make it a Task (drag and drop)
- **Do** – (if 2 minutes) – then Delete or Categorize and Archive

Categories

Use Categories as “tags”

- Include Categories field in your Inbox view (View tab → Add Columns button)
- Keep Inbox sorted by Categories (click on header to sort); uncategorized will show at top. These are your actionable emails – the ones that need processing.
- As you process, assign Categories that make sense to you – by person, by project, by priority – or use more than one
- Frequently used Categories? Use Quick Steps to speed up processing
- Routinely clear inactive Categorized emails out of Inbox to Archives

Inbox Sorted by Category

FILE **HOME** SEND / RECEIVE FOLDER VIEW DEVELOPER gSyncit ADOBE PDF

New Email New Items Clean Up Delete Reply Reply All Forward Meeting IM More Junk Email To Do Today To Do This Week To Do Next Week To read Gratitude Create New Move Rules OneNote Unread/Read Categorize Follow Up

Favorites

- Inbox** 2327
- Sent Items 1
- Archive 15
- To Read 4

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All Unread Search Current Mailbox (Ctrl+E) Current Mailbox

FROM	SUBJECT	RECEIVED	CATEGORIES	IN F...	SIZE
Categories: (none): 8 item(s), 3 unread					
Google Calendar	Notification: 37th Street Fall Barbecue @ S...	Sat 10/17/2015 5:30 PM			43...
HigherEdJobs	9 Phrases That Make You Sound Less Experi...	Sat 10/17/2015 2:28 PM			67...
Eventbrite	Order Notification for Tech Connect: A Rou...	Fri 10/16/2015 6:21 PM			92...
Eventbrite	Order Notification for Tech Connect: A Rou...	Fri 10/16/2015 6:17 PM			87...
cbacanone@unl...	Attached Image	Fri 10/16/2015 4:00 PM			19...
Jeremy Caldwell	UNL Combined Campaign for Health and H...	Fri 10/16/2015 3:44 PM			84...
	Institutional Equ... F_150131 Associate or Full Professor and E...	Fri 10/16/2015 3:33 PM			44...
Trisha Dezort	New HR Staff Members and Location Chan...	Fri 10/16/2015 12:59 ...			13...
Categories: 1. Today: 7 item(s), 4 unread					
Categories: 2. This week: 7 item(s), 5 unread					
Categories: 3. Next week: 3 item(s), 2 unread					
Categories: 4. Pending: 88 item(s), 22 unread					
Categories: Acad-Admin & Misc Appts: 36 item(s), 13 unread					
Categories: Araz Ozgur: 10 item(s), 5 unread					
Categories: Atanassov Julian: 39 item(s), 17 unread					
Categories: Awards: 11 item(s), 8 unread					

Reply Reply All

To CBA Faculty; CBA

This message was s

MessageHeaderAnal

All:

I'm happy to anno
CBA to help coordi
for Health and Hur
return all envelope
campaign runs fro
email you have eit
campaign pledge p
department lead s
most are aware of

Resources

Getting Things Done: The Art of Stress-Free Productivity, David Allen

See also his TEDx talk: <https://youtu.be/CHxhjDPKfbY> or search GTD on Google or YouTube

Maximize Your Productivity with Outlook 2010-13 Part 1 Email Management, Surface7Associates

<https://www.youtube.com/watch?v=EE6E5WX5AJM>

Maximize Your Productivity with Outlook 2010 Part 2 - Managing Tasks, Surface7Associates

<https://youtu.be/GJJu4dAbiso>

Outlook for Packrats

Presentation PowerPoint <http://bit.ly/1LAYI3U>

Cheat Sheet <http://bit.ly/1W2pGpQ>