**CHEAT SHEET**

**Outlook for Packrats: Keeping Your Stuff without Losing Your Mind**

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# Tasks

* Go to your Tasks first each day; E-mail Processing is one of many daily items in your routine

*Set Tasks as your default folder: File* 🡪 *Options* 🡪 *Advanced* 🡪 *Outlook start and exit*

* Drag an email to “Task” (or “Calendar”) link at bottom of screen to copy/convert it to a task

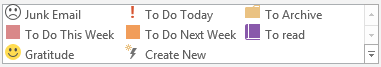
# Processing Email

**Outlook “Rules”**

* Manage emails *before* they get to your Inbox
* Route messages by: Person/group, to or cc field, keywords in subject or message, date range, etc.
* To do something: move or delete, reply or forward, flag for follow up, create an alert, assign a category, etc.
* Example: Set up a “To Read” folder for e-newsletters, announcements from a professional organization, or emails from your aunt who sends you weekly crock pot recipes. Automatically route for reading later.
* *Find* ***Rules*** *at Home tab 🡪 Rules button 🡪 Manage Rules and Alerts 🡪 click “New Rules” for wizard*

**Quick Steps**

* Use Quick Steps to enact rules for assigning categories or moving to folders



* Set up and Manage **Quick Steps** at *Home tab 🡪 Ribbon*

**Additional Tips for Processing**

* Use “Find related” emails

R click 🡪 Find Related 🡪 Messages in this conversation, Categorize all

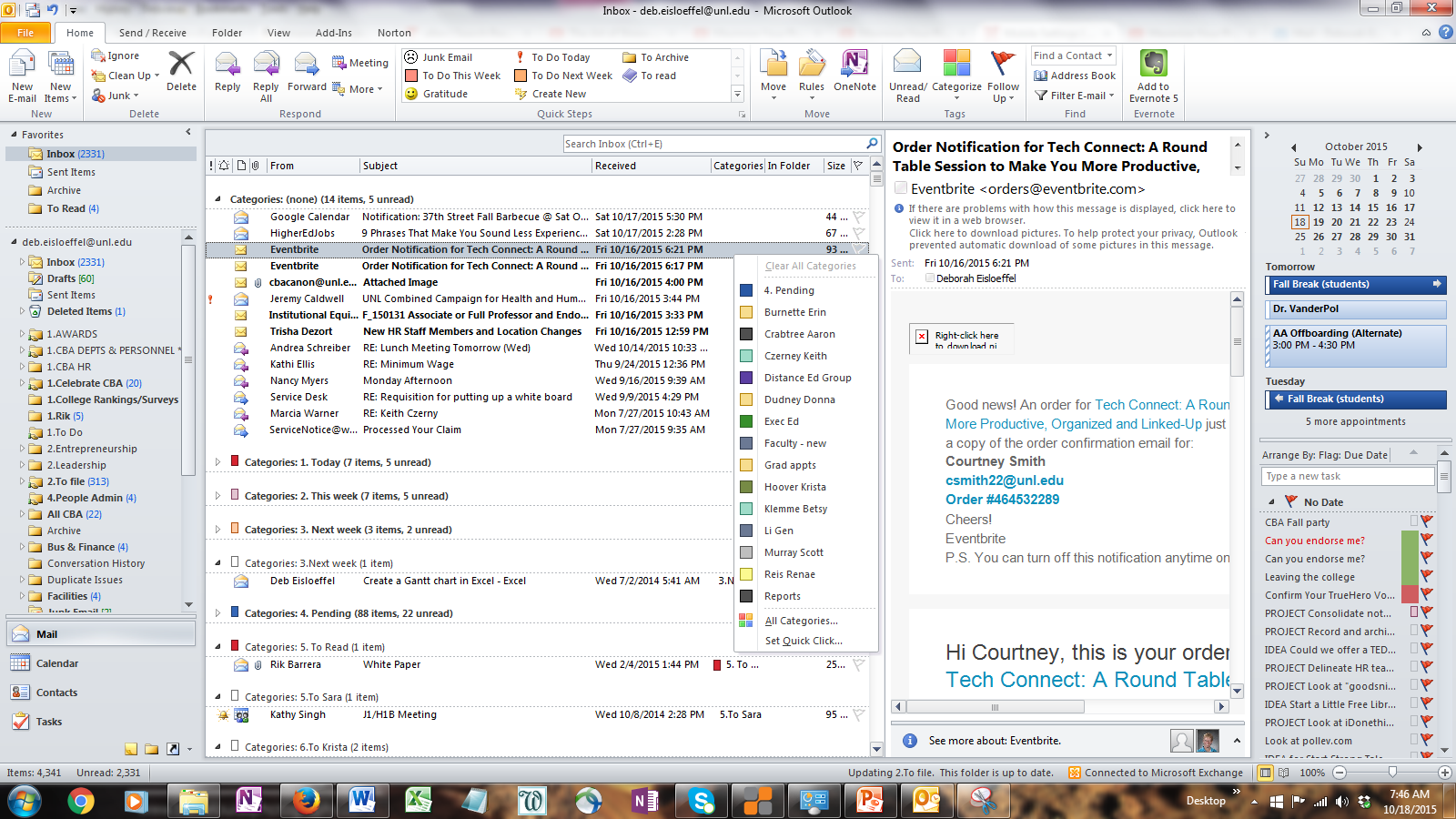
* + Manage in a batch
  + So you don’t answer already resolved issues
* You can edit emails sent to you by another

*Open email, Message tab 🡪 Actions 🡪 edit message*

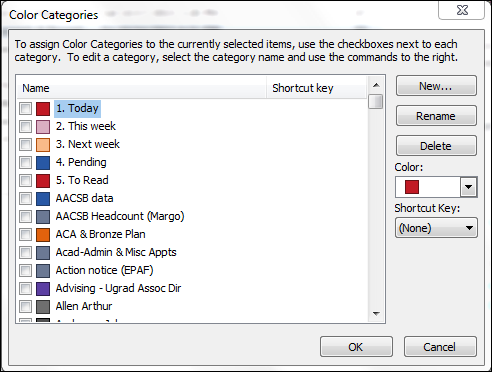
* Searches – Customize your Quick Search fields

*Click in Search Field. On Search Tools tab, select More* 🡪 *select desired fields (your fields will now come up each time you click the Search Field)*

# Categories



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| **Assign a Category**   * Right click while hovering over category field OR go to Category button on Ribbon * Drop-down menu shows the last 15 categories used * Open **All Categories Dialogue Box**    + If using a non-recent Category   + If assigning more than one Category   + If creating a new Category |



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| **All Categories Dialogue Box**   * Select “All Categories” and type first 3-letters to “find” the one you want. Click to select, click “Okay” * Make new Categories or rename as needed * Use colors to further categorize, if desired |

# 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>

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| [**2:08**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=2m08s)**Having NO system causes stress**  [**2:49**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=2m49s)**How I manage my E-mail**  [**4:56**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=4m56s) **Creating folders to organize E-mail**  [**6:25**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=6m25s) **Creating categories in E-mail**  [**7:50**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=7m50s) **Creating & applying Quick Steps**  [**12:25**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=12m25s) **Scheduling action categories**  [**13:13**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=13m13s) **Customize Outlook's Start folder** | [**14:00**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=14m00s) **Summary pt 1**  [**15:00**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=15m00s) **Stay focused, minimize distractions**  [**16:04**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=16m04s) **The 4 D's Model**  [**19:02**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=19m02s) **You make the RULES**  [**20:12**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=20m12s) **Creating RULES**  [**23:45**](http://www.youtube.com/watch?v=EE6E5WX5AJM&t=23m45s) **Summary pt 2** |

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

<https://youtu.be/GJJu4dAbiso>

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| [**1:39**](http://www.youtube.com/watch?v=GJJu4dAbiso&t=1m39s) **Cleaning your Task list view**  [**2:33**](http://www.youtube.com/watch?v=GJJu4dAbiso&t=2m33s) **Outlook's To-Do bar**  [**3:31**](http://www.youtube.com/watch?v=GJJu4dAbiso&t=3m31s) **Viewing Tasks alongside Appointments**  [**4:19**](http://www.youtube.com/watch?v=GJJu4dAbiso&t=4m19s) **Viewing all Tasks** | [**5:10**](http://www.youtube.com/watch?v=GJJu4dAbiso&t=5m10s) **Sorting Tasks**  [**7:30**](http://www.youtube.com/watch?v=GJJu4dAbiso&t=7m30s) **Assigning Tasks to others**  [**8:59**](http://www.youtube.com/watch?v=GJJu4dAbiso&t=8m59s) **Create a To-Do item from a contact**  [**9:45**](http://www.youtube.com/watch?v=GJJu4dAbiso&t=9m45s) **Summary** |

**Outlook for Packrats**

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

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