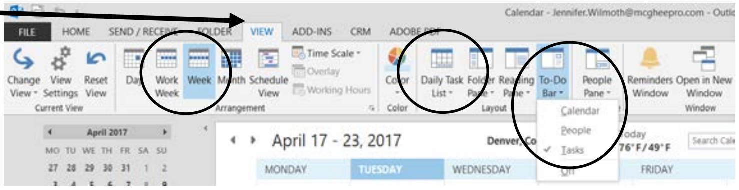
Chapter 2: Setting up the ContolPanel

Go to your Calendar in Outlook

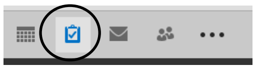
Select **View** from the tabs at the top of your window

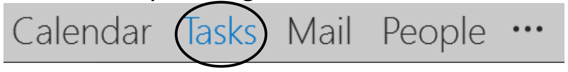
1. Choose the **Work Week or Week** icon on the ribbon
2. Choose the **Daily Task List** icon on the ribbon
    a. Select **Normal** from the dropdown list
3. Choose the **To-Do Bar** icon on the ribbon
    a. Select **Tasks** from the dropdown list


Calendar - Jennifer.Wilmoth@mcgheepro.com - Outlo
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
ADD-INS
CRM
ADOBE PDF
Change View
View Settings
Reset View
Current View
Day
Work Week
Week
Month
Schedule View
Time Scale
Overlay
Working Hours
Arrangement
Color
Daily Task List
Folder Pane
Reading Pane
To-Do Bar
People Pane
Layout
Reminders Window
Open in New Window
Window
Calendar
People
Tasks
Off
April 2017
April 17 - 23, 2017
Denver, Co
Today 76°F/49°F
Search Cale
MONDAY
TUESDAY
WEDNESDAY
FRIDAY

Chapter 4: Setting up the To-Do List to view Categories: (None)

Go to your To-Do List in Outlook by clicking on either the task icon or the Tasks navigation buttons




Calendar
Tasks
Mail
People
•••

Select **View** from the tabs at the top of your window

Choose the **View Settings** icon on the ribbon

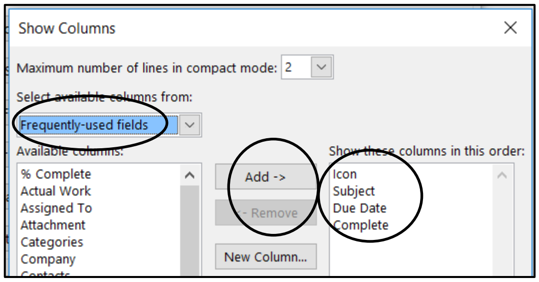
Click on **Columns**

Choose **Frequently Used Fields** under **Select available Columns From**

Add & **Remove** until you have the four fields in this order:

Icon
Subject
Due Date
Complete

Click **OK** once to return to the View Settings



Show Columns

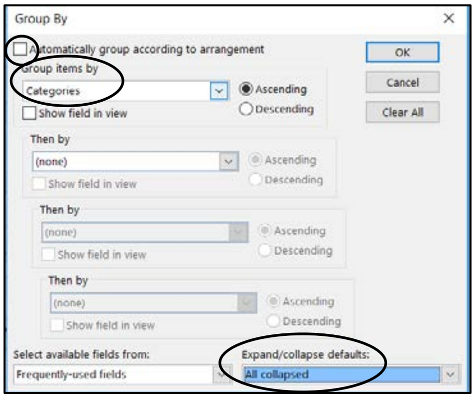
Maximum number of lines in compact mode: 2

Select available columns from: Frequently-used fields

Available columns:
% Complete
Actual Work
Assigned To
Attachment
Categories
Company
Contacts

Add ->
Remove
New Column...

Show these columns in this order:
Icon
Subject
Due Date
Complete



Group By

☐ Automatically group according to arrangement

Group items by: Categories ● Ascending ○ Descending
☐ Show field in view

Then by: (none) ○ Ascending ○ Descending
☐ Show field in view

Then by: (none) ○ Ascending ○ Descending
☐ Show field in view

Then by: (none) ○ Ascending ○ Descending
☐ Show field in view

Select available fields from: Frequently-used fields

Expand/collapse defaults: All collapsed

OK
Cancel
Clear All

Click on **Group By**

Uncheck the box to the left of **Automatically group according to arrangement** if it is checked

Choose **Categories** under **Group Items By**

Ensure **Ascending** is selected to the right of Categories

Choose **All Collapsed** under **Expand/Collapse defaults**

Click **OK** once to return to the View Settings

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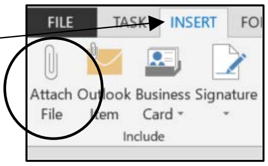
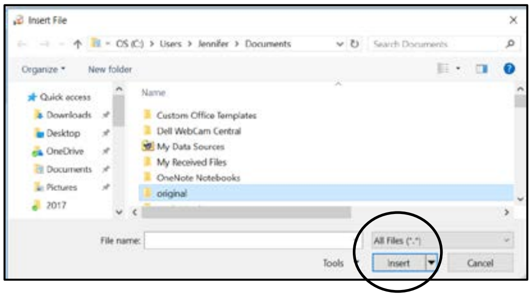
Chapter 9: Attaching documents to a Task

Open the Task for which you want to attach attached

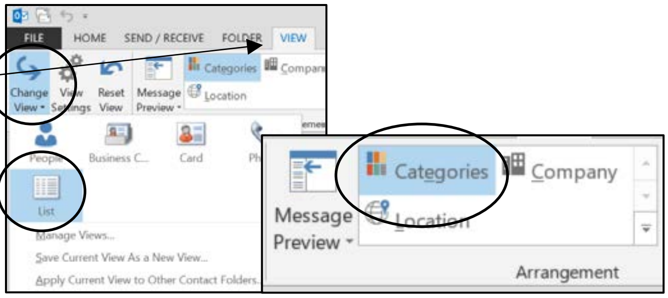

FILE
TASK
INSERT
FO
Attach File
Outlook Item
Business Card
Signature
Include

Select **Insert** from the tabs at the top of your Task
Choose the **Attach File** icon on the ribbon
This opens your Folder List (you can select any folder)
Select the **document** you want and click Insert and it will attach that file into the body of your Task (Note: this inserts the actual document, not a hyperlink. See instructions above to insert a Hyperlink)


Insert File
OS (C:) › Users › Jennifer › Documents
Search Documents
Organize
New folder
Quick access
Downloads
Desktop
OneDrive
Documents
Pictures
2017
Name
Custom Office Templates
Dell WebCam Central
My Data Sources
My Received Files
OneNote Notebooks
original
File name:
All Files (*.*)
Tools
Insert
Cancel

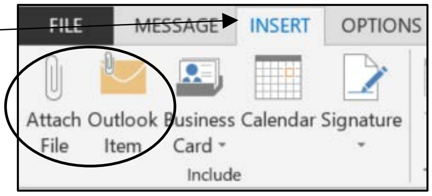
Chapter 10: Viewing Contacts by categories

Go to Contacts
Select **View** from the tabs at the top of your Task
Choose the **Change View** icon on the ribbon
Select **List** from the dropdown
Select **Categories** icon on the ribbon


FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
Change View
View Settings
Reset View
Message Preview
Categories
Company
Location
People
Business C...
Card
List
Manage Views...
Save Current View As a New View...
Apply Current View to Other Contact Folders...
Message Preview
Categories
Company
Location
Arrangement

Chapter 11: Attaching Files or Outlook Items to an email message

Open the email
Select **Insert** from the tabs at the top of your email
Choose the **Attach File** or **Outlook item** on the ribbon
Select the file and click Insert
Or
Select the item and click OK


FILE
MESSAGE
INSERT
OPTIONS
Attach File
Outlook Item
Business Card
Calendar
Signature
Include

Chapter 11: Setting up the To-Do Bar

Go to the Calendar view with the To-Do Bar to the right (See chapter 2: Setting up the ControlPanel if you do not see your To-Do Bar to the right of the Calendar)

Right-click on the To-Do Bar headings (Note: they may look just like these)

Choose **View Settings** from the menu

Click on **Columns**

Choose **Frequently Used Fields** under **Select available Columns From**

Add & **Remove** until you have the four fields in this order:

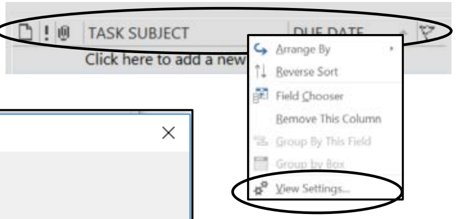
Icon

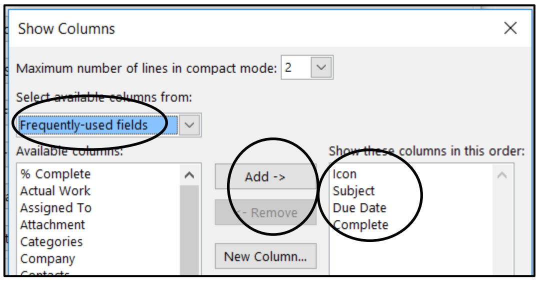
Subject

Due Date

Complete

Click **OK** once to return to the View Settings


TASK SUBJECT
DUE DATE
Click here to add a new
Arrange By
Reverse Sort
Field Chooser
Remove This Column
Group By This Field
Group by Box
View Settings...

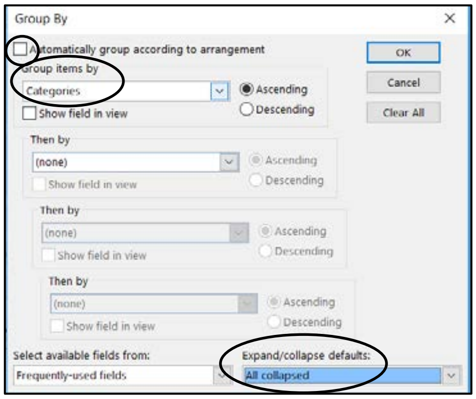

Show Columns
Add ->
<- Remove
New Column...

Maximum number of lines in compact mode: 2

Select available columns from: Frequently-used fields

Available columns:
% Complete
Actual Work
Assigned To
Attachment
Categories
Company
Contacts

Show these columns in this order:
Icon
Subject
Due Date
Complete


Group By
OK
Cancel
Clear All

☐ Automatically group according to arrangement

Group items by: Categories ● Ascending ○ Descending

☐ Show field in view

Then by: (none) ○ Ascending ○ Descending

☐ Show field in view

Then by: (none) ○ Ascending ○ Descending

☐ Show field in view

Then by: (none) ○ Ascending ○ Descending

☐ Show field in view

Select available fields from: Frequently-used fields

Expand/collapse defaults: All collapsed

Click on **Group By**

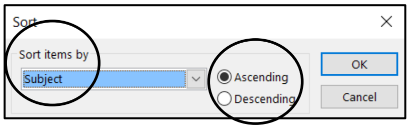
Uncheck the box to the left of **Automatically group according to arrangement** if it is checked

Choose **Categories** under **Group Items By**

Ensure **Ascending** is selected to the right of Categories

Choose **All Collapsed** under **Expand/Collapse defaults**

Click **OK** once to return to the View Settings


Sort
OK
Cancel

Sort items by: Subject ● Ascending ○ Descending

Click on **Sort**

Choose **Subject** under **Sort Items By**

Ensure **Ascending** is selected to the right

Click **OK** once to return to the View Setting

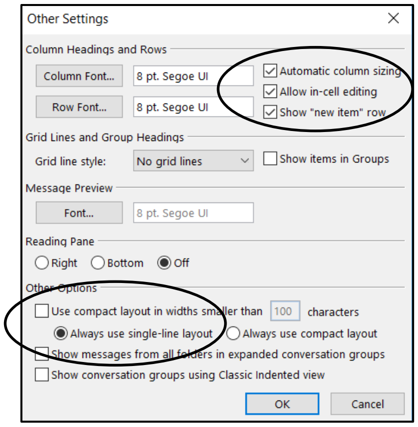
Click on **Other Settings**

Select **Automatic Column Sizing, Allow in-cell editing** and **Show "new item" row**

Uncheck the box to the left of **Use Compact Layout in widths smaller than…** so that **Always use single-line layout** is selected

Click **OK** once to return to the View Settings

Click **OK** again to exit View Settings


Other Settings
Column Headings and Rows
Column Font...
Row Font...
Grid Lines and Group Headings
Message Preview
Font...
Reading Pane
Other Options
OK
Cancel

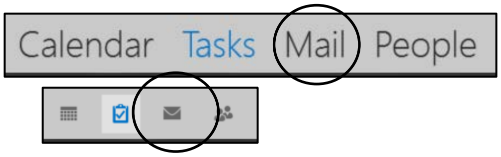
Column Font: 8 pt. Segoe UI
Row Font: 8 pt. Segoe UI
☑ Automatic column sizing
☑ Allow in-cell editing
☑ Show "new item" row
Grid line style: No grid lines
☐ Show items in Groups
Font: 8 pt. Segoe UI
○ Right ○ Bottom ● Off
☐ Use compact layout in widths smaller than 100 characters
● Always use single-line layout ○ Always use compact layout
☐ Show messages from all folders in expanded conversation groups
☐ Show conversation groups using Classic Indented view

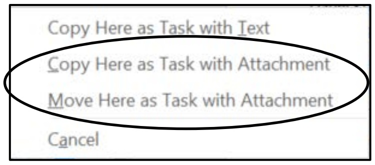
Chapter 11: Dragging an email to the To-Do Bar

Select the email that you want to copy or move to a Task

Right-click and drag the email to the **Mail** Navigation button - depending on your settings it will either be an envelope icon or the word Mail.

When you release your right-click you will get these options: (if you didn't get these choices, try again and be sure to RIGHT-CLICK while you drag.)


Calendar
Tasks
Mail
People


Copy Here as Task with Text
Copy Here as Task with Attachment
Move Here as Task with Attachment
Cancel

We recommend you choose either:

Copy Here as Task with Attachment - this will leave one copy of the email in the inbox and attaches another copy in the body of a Task.

Move Here as Task with Attachment - this deletes the email from the inbox and attaches the email to the body of a Task.

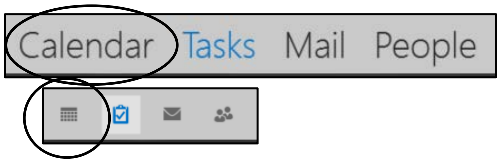
Using **Task with Attachment** will ensure that the email will be attached - including any attachments to the email

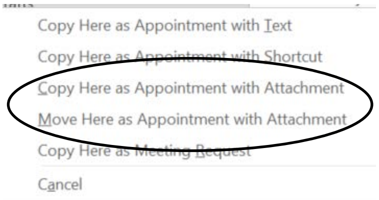
Chapter 11: Dragging an email to the Calendar

Select the email that you want to copy or move to a calendar appointment

Right-click and drag the email to the **Calendar** Navigation button - depending on your settings it will either be an calendar icon or the word Calendar.

When you release your right-click you will get these options: (if you didn't get these choices, try again and be sure to RIGHT-CLICK while you drag.)


Calendar
Tasks
Mail
People


Copy Here as Appointment with Text
Copy Here as Appointment with Shortcut
Copy Here as Appointment with Attachment
Move Here as Appointment with Attachment
Copy Here as Meeting Request
Cancel

We recommend you choose either:

Copy Here as Appointment with Attachment - this will leave one copy of the email in the inbox and attaches another copy in the body of an appointment.

Move Here as Appointment with Attachment - this deletes the email from the inbox and attaches the email to the body of an appointment.

Using **Task with Attachment** will ensure that the email will be attached - including any attachments to the email

Chapter 11: Attaching an email to an existing Task

See **Chapter 9: Attaching emails to a task** or **Chapter 9: Attaching documents to a task**.

Chapter 11: Attaching an email to an existing Appointment

Follow instructions for **Chapter 9: Attaching emails to a task** or **Chapter 9: Attaching documents to a task** only open an appointment instead of a Task.

Chapter 12: Creating recurring Appointments

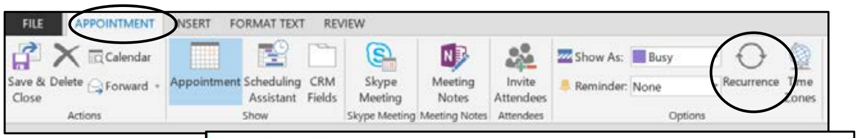
Open the Appointment

Select **Appointment** from the tabs at the top of your appointment or meeting

Choose the **Recurrence** button on the ribbon

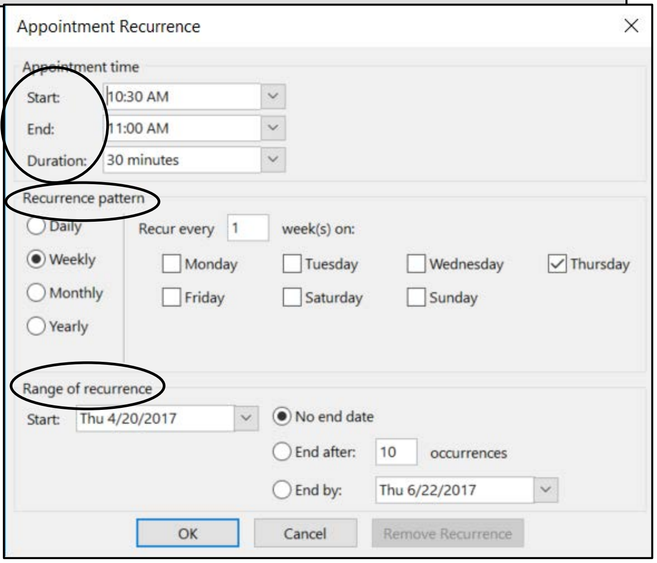
- Check the **Start** time, **End** time and **Duration** are correct
- Choose the **Recurrence pattern**
  - Daily
    - Every “x” day
    - Weekday only
  - Weekly
    - Specific days of week (Mon & Tue)
    - Every “x” day of month (3rd Thursday)
  - Monthly
    - Specific days of month (Wed & Fri)
    - Every “x” day of month (3rd Thursday of month)
  - Yearly
    - Specific date of year (28th March)
    - Every “x” day of year (2nd Friday of April)
- Decided the **Range of recurrence**
  - Start date
  - No end date
  - End after “x” occurrence
  - End by (choose a specific date)

Click OK


FILE
APPOINTMENT
NSERT
FORMAT TEXT
REVIEW
Save & Close
Delete
Calendar
Forward
Actions
Appointment
Scheduling Assistant
Show
CRM Fields
Skype Meeting
Skype Meeting
Meeting Notes
Meeting Notes
Invite Attendees
Attendees
Recurrence
me Zones
Options

Show As: Busy

Reminder: None


Appointment Recurrence

Appointment time

Start: 10:30 AM

End: 11:00 AM

Duration: 30 minutes

Recurrence pattern

○ Daily

● Weekly

○ Monthly

○ Yearly

Recur every 1 week(s) on:

☐ Monday ☐ Tuesday ☐ Wednesday ☑ Thursday

☐ Friday ☐ Saturday ☐ Sunday

Range of recurrence

Start: Thu 4/20/2017

● No end date

○ End after: 10 occurrences

○ End by: Thu 6/22/2017

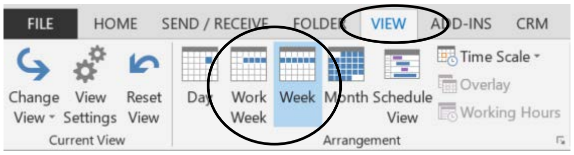
OK
Cancel
Remove Recurrence

Chapter 12: Setting up the Weekly Calendar View

Go to Calendar

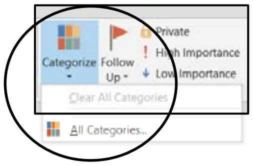
Select **View** from the tabs at the top of your Calendar

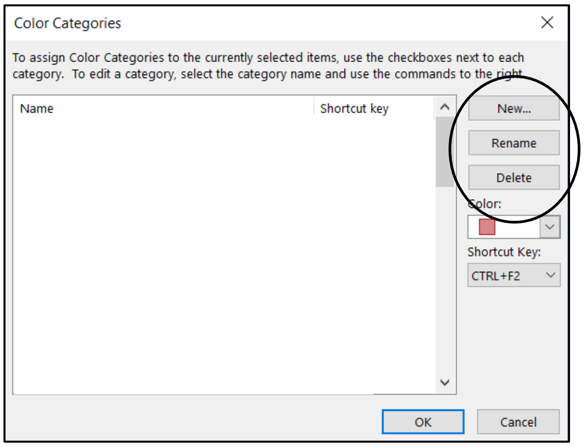
Choose the **Week** or **Work Week** icon on the ribbon


FILE
HOME
SEND / RECEIVE
FOLDE
VIEW
ADD-INS
CRM
Change View
View Settings
Reset View
Current View
Day
Work Week
Week
Month
Schedule View
Arrangement
Time Scale
Overlay
Working Hours

Chapter 12: Adding Categories

Go to Calendar and open an Appointment
Select **Appointment** from the tabs at the top of your window
Click on **Categorize** on the Untitled Task ribbon
Select **All Categories** from the dropdown list


Categorize
Follow Up
Private
High Importance
Low Importance
Clear All Categories
All Categories...

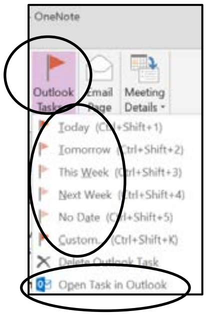

Color Categories
Name
Shortcut key
New...
Rename
Delete
Color:
Shortcut Key:
CTRL+F2
OK
Cancel

To assign Color Categories to the currently selected items, use the checkboxes next to each category. To edit a category, select the category name and use the commands to the right.

Click **New…** to add calendar categories
Click **Rename** to change existing categories
Click **Delete** to eliminate existing categories

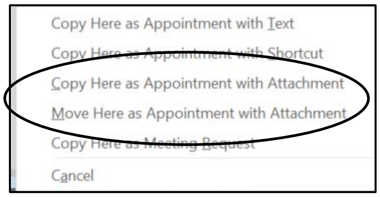
Chapter 12: Creating a Task from OneNote

Go to OneNote and **right-click** anywhere in the text you want to make an Outlook Task
Select **Home** from the tabs at the top of your window
Click on **Outlook Tasks** on the ribbon
Select **Due Date** from the dropdown list
Click on **Outlook Tasks** on the ribbon again
Select **Open Task in Outlook** from the dropdown list


OneNote
Outlook Tasks
Email Page
Meeting Details
Today (Ctrl+Shift+1)
Tomorrow (Ctrl+Shift+2)
This Week (Ctrl+Shift+3)
Next Week (Ctrl+Shift+4)
No Date (Ctrl+Shift+5)
Custom... (Ctrl+Shift+K)
Delete Outlook Task
Open Task in Outlook

Chapter 12: Copying or Moving a Task directly to the Calendar

Select the Task that you want to attach to a Calendar Appointment
Right-click and drag the task to the **Calendar** on the date and time where you want it to go
When you release your right-click you will get these options: (if you didn't get these choices, try again and be sure to RIGHT-CLICK while you drag.)


Copy Here as Appointment with Text
Copy Here as Appointment with Shortcut
Copy Here as Appointment with Attachment
Move Here as Appointment with Attachment
Copy Here as Meeting Request
Cancel

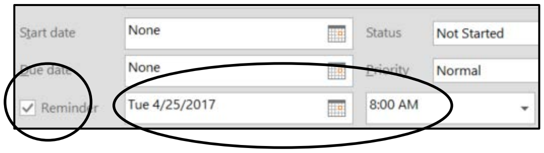
We recommend you choose either:

Copy Here as Appointment with Attachment - this will leave one copy of the task in the To-Do Bar and attaches another copy in the body of an appointment.

Move Here as Appointment with Attachment - this deletes the task from the To-Do Bar and attaches the Task to the body of an appointment.

Using **Appointment with Attachment** will ensure that the Task will be attached - including any text, hyperlinks or emails that you included in the body of the Task

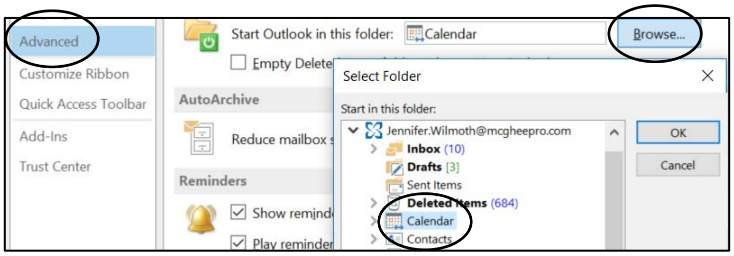
Chapter 12: Using Reminders


Start date: None
Status: Not Started
Due date: None
Priority: Normal
☑ Reminder: Tue 4/25/2017 8:00 AM

Open the Task
Check to box to the left of **Reminder**
Set the **date** and **time** for the reminder
Click **Save and Close**

Chapter 12: Making the ControlPanel the Default View

Go to the Calendar
Select **File** from the tabs at the top of your window
Click on **Options** on the left
Select **Advance** from the tabs on the left
Click on **Browse** to the right of the folder listed next to **Start Outlook in this folder**
Select **Calendar** from the dropdown
Click OK
Click OK again


Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Browse...
AutoArchive
Reminders
Select Folder
OK
Cancel
Start Outlook in this folder: Calendar
☐ Empty Delete
Reduce mailbox s
☑ Show remind
☑ Play reminder
Start in this folder:
Jennifer.Wilmoth@mcgheepro.com
Inbox (10)
Drafts [3]
Sent Items
Deleted Items (684)
Calendar
Contacts