

***Manage Your  
Life with  
Outlook<sup>®</sup>***  
FOR  
**DUMMIES<sup>®</sup>**

**by Greg Harvey**



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Wiley Publishing, Inc.



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## **Manage Your Life with Outlook® For Dummies®**

Published by

**Wiley Publishing, Inc.**

111 River Street

Hoboken, NJ 07030-5774

[www.wiley.com](http://www.wiley.com)

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Published by Wiley Publishing, Inc., Indianapolis, Indiana

Published simultaneously in Canada

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Library of Congress Control Number: 2008935816

ISBN: 978-0-471-95930-4

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1



# About the Author

Greg Harvey has authored tons of computer books, the most recent being *Excel Workbook For Dummies* and *Roxio Easy Media Creator 8 For Dummies*, and the most popular being *Excel 2007 For Dummies* and *Excel 2007 All-in-One Desk Reference For Dummies*. He started out training business users on how to use IBM personal computers and their attendant computer software in the rough and tumble days of DOS, WordStar, and Lotus 1-2-3 in the mid-80s of the last century. After working for a number of independent training firms, he went on to teach semester-long courses in spreadsheet and database management software at Golden Gate University in San Francisco.

His love of teaching has translated into an equal love of writing. *For Dummies* books are, of course, his all-time favorites to write because they enable him to write to his favorite audience: the beginner. They also enable him to use humor (a key element to success in the training room) and, most delightful of all, to express an opinion or two about the subject matter at hand.

Greg received his doctorate degree in Humanities in Philosophy and Religion with a concentration in Asian Studies and Comparative Religion last May. Everyone is glad that Greg was finally able to get out of school before he retired.

For the past two years, Greg has been actively researching productivity in the modern workplace and the various ideas and systems developed for improving work/life, especially using Microsoft's Outlook software.





# ***Dedication***

*To Katie Feltman in great appreciation of her unwavering support for the  
concept and execution of this book*



# *Author's Acknowledgments*

Let me take this opportunity to thank all the people, both at Wiley Publishing, Inc., and at Mind Over Media, Inc., whose dedication and talent combined to get this book out and into your hands in such great shape.

At Wiley Publishing, Inc., I want to thank Andy Cummings and Katie Feltman for their encouragement and help in getting this project under way and their ongoing support every step of the way; Leah Cameron and Paul Levesque for making sure that the project stayed on course and made it into production so that all the talented folks on the production team could create this great final product.

At Mind Over Media, I want to thank Christopher Aiken for his review of the updated manuscript and invaluable input and suggestions on how best to address both the more theoretical and downright practical concerns of personal productivity in the modern workplace.

## **Publisher's Acknowledgments**

We're proud of this book; please send us your comments through our online registration form located at [www.dummies.com/register/](http://www.dummies.com/register/).

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# Introduction

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**M**ake no mistake about it; the subject of this book is enhancing your personal productivity rather than using Microsoft Outlook. As far as this book's concerned, Outlook is merely a means to an end, and that end is simply to bring your professional and personal lives into greater balance. And the full expectation is that this greater balance will bring with it a greater sense of satisfaction and fulfillment to both aspects of your life.

Fortunately, when it comes to enhancing your personal productivity, Outlook can serve you quite well. Beyond its obvious e-mail capabilities, Outlook offers a whole array of tools you can immediately start bringing to bear in your effort to deal more effectively with both your professional and personal obligations. The pages ahead, then, are chock-full of ideas, suggestions, and practical techniques all designed to guide you towards making Outlook the principal toolkit you use in your pursuit of enhanced personal productivity, better work/life balance, and greater happiness.

## *About This Book*

Given that the subject of personal productivity has both its theoretical and practical aspects, so does this book. It consists roughly of one part vision and three parts application. The vision stuff in the first part gives you ideas on the current thinking of what it takes to achieve peak productivity as well as ideas on how to assess your own particular situation. The practical, Outlook-related information in the remainder of the book then gives you the lowdown on how to mold this program to fit your work/life situation so you can actually realize your productivity vision.

This doesn't mean, however, that the book is meant to be read from beginning to end or from cover to cover. Although the chapters are organized in a logical order (progressing from the more theoretical aspects of personal productivity to the downright practical with Outlook), each topic covered in a chapter is really meant to stand pretty much on its own. It's really up to you to figure out where you need to go and what information will be of most help.

## *How to Use This Book*

This book is like a reference in which you start out by looking up the topic you need information about (either in the Table of Contents or the Index), and then you refer directly to the section of interest. I explain most topics conversationally (as though you were in my office). Sometimes, however, my regiment-commander mentality takes over, and I list the steps you need to take to accomplish a particular task in a particular section.

I do recommend you start, at the very least, by perusing the theoretical, assessment-type stuff in the chapters in Part I, even if you think you know exactly where you're coming from and are quite sure where you want and need to go. I say this because framing (or reframing) the problem and possible solutions are often tremendous motivators that can really help get you going and keep you going. This type of fundamental assessment can also prevent you from wasting time on exploring practical, Outlook techniques in chapters in the later parts that really don't address your most pressing and immediate productivity snafus and conundrums.

## *Foolish Assumptions*

The only assumptions I make about you, dear reader (other than you're highly motivated to bring your professional and personal life into better balance), are that you currently use either Microsoft Outlook 2003 or, the latest, Outlook 2007 for taking care of your e-mail and that your computer is running some version of the Windows operating system. And, as a result, you run Outlook every day (whether or not your computer automatically launches the program at its startup) so that Outlook is readily available to you whenever you're at the computer.

As for your experience and skill level with Outlook, it really doesn't matter whether or not you've ever strayed any further than its Inbox or that you have loads of experience using its more advanced features and other modules. The important thing here is that you maintain a willingness to explore aspects of this program that are new to you and to adopt a new perspective towards those aspects with which you're already familiar.

Beyond that, you simply need to be open to developing habits that support and enhance your overall personal productivity. Remember that there are no gold stars for knowing more about Outlook and its hundreds of features. In fact, the only brownie points given are for knowing how to use those Outlook features that actually put you in greater control of your work and life.



## *How This Book Is Organized*

This book is organized in five parts. Each part contains two or more chapters with related content. Each chapter is further divided into loosely related sections that cover the basics of the topic at hand. You should not, however, get too hung up about following along with the structure of the book; ultimately, it doesn't matter at all if you find out how to manage your to-do list in the Tasks module before you find out how to do scheduling in the Calendar. The important thing is that you find the information — and understand it when you find it — when you need to explore a new aspect of personal productivity or use Outlook to achieve it.

In case you're interested, here's a synopsis of what you find in each part that follows.

### *Part I: Preparing for Personal Productivity*

The four chapters in this part set the stage for using Outlook as your personal information manager. They not only give you basic information on the current thinking on just what it takes to be truly productive in the modern work world, but they also enable you to take a good long look at your situation and come up with your own definition of personal productivity.

### *Part II: Making Outlook Your Key to Personal Productivity*

The two chapters in this part give you an overview of Outlook's complete capabilities as a personal information manager (far beyond just your e-mail and address program). Chapter 5 acquaints (or reacquaints) you with the modular setup of Outlook and how you can use its various features in your quest towards increased productivity. Chapter 6 then gives you suggestions on how you might customize Outlook so that it better serves your productivity goals.

### *Part III: Taking Control of Your E-Mail Inbox*

Increased personal productivity with Outlook starts and ends with taking control of your Outlook e-mail Inbox. The chapters in this part give you the lowdown on exactly how to do this. Chapter 7 shows you how to do a basic Inbox housecleaning and Chapter 8 then goes on to show you how to do ongoing housekeeping to keep your Inbox under your control.

## ***Part IV: Developing Your Outlook Productivity Practices***

The first six chapters in this part cover Outlook productivity practices in detail across each of its major modules. The final chapter in this part then gives you suggestions on how to take your Outlook data with you when you're on the go. Together, the practical information in this part is designed to give you everything you need to truly make Outlook your complete personal information manager.

## ***Part V: The Part of Tens***

The two chapters in the Part of Tens give you access to two of my top ten lists. Chapter 16 gives you my top ten personal productivity strategies that encapsulate the attitudes that I think are essential for you to cultivate in your quest for increased productivity. Chapter 17 then gives you my top ten Outlook productivity techniques that you can use as a checklist in determining the types of new Outlook habits you should nurture.

## ***Appendixes***

The two appendixes give you a guide to more resources on personal productivity along with a tool for assessing your needs and goals. Appendix A offers a list of print and online productivity resources that you can consult for more information on this fascinating subject. Appendix B acts as an assessment tool that you can use to record your vision, aspirations, and near- and long-term objectives for achieving greater personal productivity and better work/life balance.

## ***Conventions Used in This Book***

Throughout the text, I give you keyboard shortcuts that you need to learn by heart in order to attain top productivity. Most of these shortcuts are key combos that use the Ctrl in combination with other letters, although some use the Shift key as well. With these shortcuts, you need to hold down the Ctrl (and Shift key) as you type the letter.

When it comes to menu commands, this book uses command arrows to lead you from the initial menu, to any submenus, and finally to the command option you ultimately want. For example, if you need to open the File menu to get to the Open command, that instruction would look like this: Choose File⇨Open.

Finally, if you're really observant, you may notice a slight discrepancy between the capitalization of the names of dialog box options (such as headings, option buttons, and check boxes) as they appear in the book and how they actually appear in Outlook on your computer screen. I intentionally use the convention of capitalizing the initial letters of all the main words of a dialog box option to help you differentiate the name of the option from the rest of the text describing its use.

## Special Icons

The following icons are strategically placed in the margins to point out stuff you may or may not want to read.



This icon means the paragraph contains nerdy discussions that you may well want to skip (or read when no one else is around).



This icon alerts you to shortcuts or other valuable hints related to the topic at hand.



This icon highlights information to keep in mind if you want to meet with a modicum of success.



This icon indicates some suggestion or hint that you may find really helps you become more productive.



This icon alerts you to information to keep in mind if you want to avert some dire future problems.



This icon flags material that is specific to Outlook 2007, the latest version of the software.

## *Where to Go from Here*

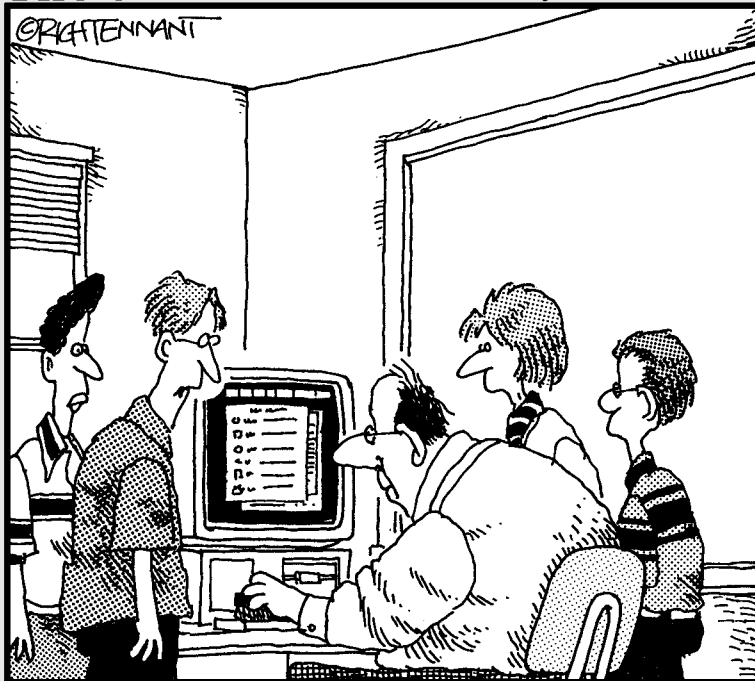
I have a couple of suggestions for where to go from here (after you get a chuckle from the great Rich Tennant cartoons). You may want to go directly to the Part of Tens to check out my top ten lists; in Chapter 16, you find a list for general productivity strategies, and Chapter 17 offers a list with a particular emphasis on Outlook productivity techniques. Otherwise, I suggest you start out by taking a look at the material in Chapter 1 and using its information and suggestions to start devising your very own plan for becoming as productive as you possibly can with Outlook so that you can immediately begin to bring your professional and personal lives into greater harmony.

# Part I

# Preparing for Personal Productivity

The 5<sup>th</sup> Wave

By Rich Tennant



"I think the cursor's not moving, Mr. Dundt,  
because you're using the chalk board eraser  
instead of a mouse."

## *In this part . . .*

**I**ncreasing your personal productivity to achieve greater work/life balance is not simply a matter of acquiring and applying new skills in Outlook. Before that, you need to do some assessment work. The chapters in this first part are designed to help you go through the process of understanding the place from which you're starting as well as visualize the place you intend to be.