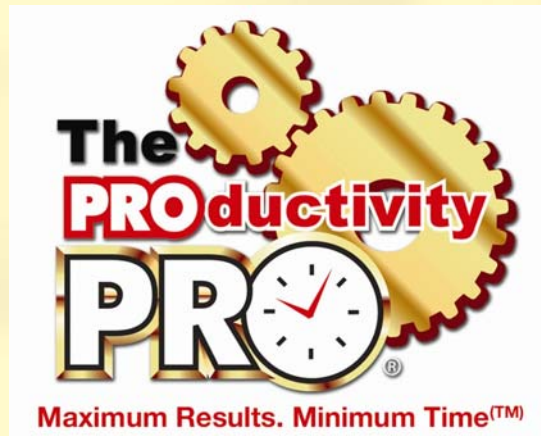


# Advanced Microsoft Outlook

## LMS Modules

Presented by  
**Laura Stack, MBA, CSP**

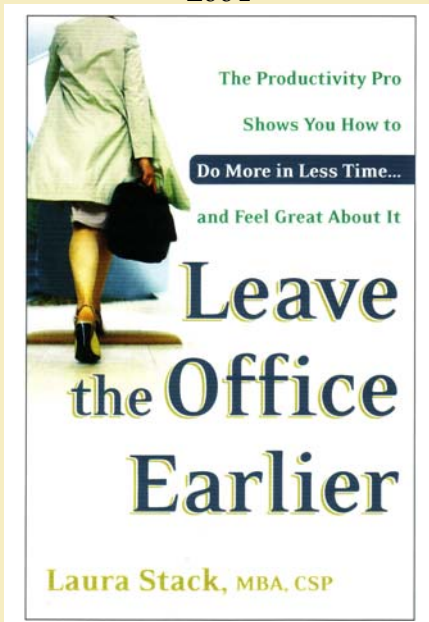


9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130

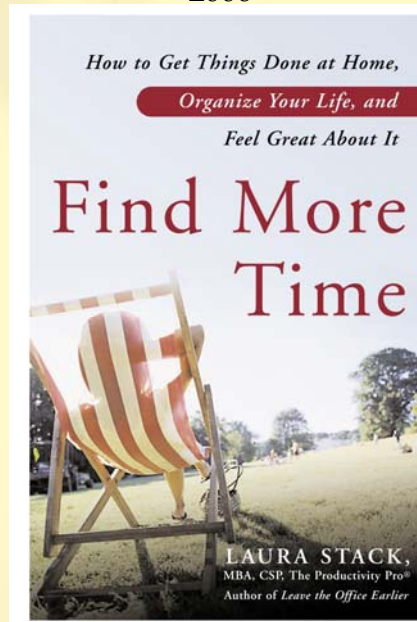
Phone: 303-471-7401, Fax: 303-471-7402

Email: [Laura@TheProductivityPro.com](mailto:Laura@TheProductivityPro.com), Website: [www.TheProductivityPro.com](http://www.TheProductivityPro.com)

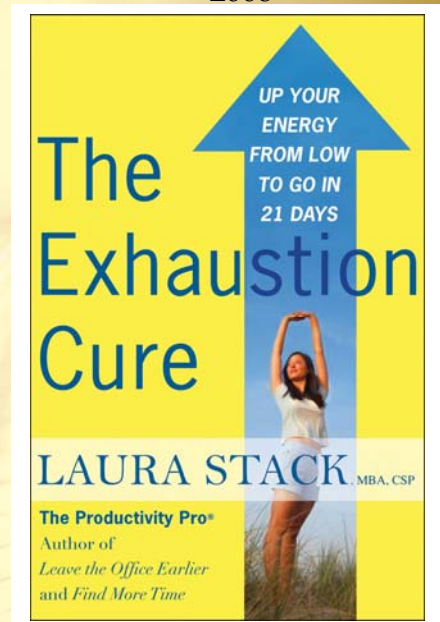
2004



2006



2008



## About The Productivity Pro®, Inc.

Laura Stack, MBA, CSP, is a personal productivity expert, author, and professional speaker who helps busy workers Leave the Office Earlier® with Maximum Results in Minimum Time®. She is the president of The Productivity Pro®, Inc., a time management training firm specializing in productivity improvement in high-stress organizations. Since 1992, Laura has presented keynotes and seminars on improving output, lowering stress, and saving time in today's workplaces. She is one of a handful of professional speakers whose business focuses solely on time management and productivity topics. She is a high-energy, high-content speaker, who educates, entertains, and motivates professionals to improve workplace productivity.

Laura is the author or co-author of five books, including *The Exhaustion Cure* (Broadway Books, 2008), *Find More Time* (Broadway Books, 2006), two of the popular *Chicken Soup for the Soul* books, and the bestselling *Leave the Office Earlier* (Broadway Books, 2004), which was hailed as "the best of the bunch" by the New York Times and listed on the June 2004 Book Sense Business & Economics Bestseller list. *Leave the Office Earlier* has been published in seven countries and in five foreign languages, including Japanese, Korean, Chinese, Taiwanese, and Italian. Laura's popular monthly electronic newsletter has subscribers in 38 countries. She is a Certified Specialist in Microsoft® Office Outlook.

Widely regarded as one of the leading experts in the field of employee productivity and workplace issues, she has been featured nationally on the CBS Early Show, CNN, NPR, Bloomberg, NBC TV, WB News, the New York Times, USA Today, The Wall Street Journal, the WashingtonPost.com, the Chicago Tribune, O Magazine, SELF, Me, Working Mother magazine, Entrepreneur magazine, Readers Digest, Woman's Day, and Parents magazine. Laura has been a spokesperson for Microsoft, 3M, and Day-Timers, and she is the creator of The Productivity Pro® line of Day-Timer® planning system. Her client list includes top Fortune 500 companies, including Microsoft, IBM, GM, Coors, the Denver Broncos, Lockheed Martin, Lucent Technologies, Wells Fargo, Mobil, Time Warner, and VISA, plus a multitude of associations and governmental agencies.

Laura holds an MBA in Organizational Management (University of Colorado, 1991), integrating the importance of productivity in business with employee retention and satisfaction. She is on the Board of Directors of the National Speakers Association (NSA) and is the recipient of the Certified Speaking Professional (CSP) designation, NSA's highest earned designation.

Laura lives with her husband and three children in Denver, Colorado.



## Outlook Video Modules by Laura Stack

1. Layout: Six Main Areas on the Main Screen: Menus, Toolbars, Navigation
2. Pane/Folder List, Information Viewer, Reading Pane, To-Do Bar/Pane
3. Interface: Once an Item Is Opened
4. Microsoft Office Button
5. Quick Access Toolbar
6. Mini Toolbar
7. Customizing the Quick Access Toolbar
8. Understanding and Customizing Toolbars
9. Add a Frequently-Used Command or Field to Your Toolbar.
10. If You Goof Up, Revert to the Default.
11. Show Your Full Menus (So You Don't Click or Wait For Them to Expand)
12. Navigation Pane Changes
13. The Ten Main Modules
14. Use the Configure Button to Customize the Views You Use Frequently
15. Operations: The Outlook Cockpit
16. There Are **Six** Basic Ways to do Things in Outlook.
17. Read/View Messages and Information.
18. Turn on the Spelling Checker.
19. Show the Help Menu.
20. Turn on Screen Tips.
21. Views: Changing How You Slice and Dice Your Data
22. Start Up in a Specific Area of Outlook (Calendar, Inbox, etc.).
23. View Different Folder Lists.
24. Sort Your Data.
25. Group Your Data in Related "Clumps."
26. Columns: Have It Your Way: Add, Remove, Move, Widen/Shrink, Format
27. Folders: **They Aren't Just** for Email
28. Create an Umbrella Folder.
29. Create Personal Folders.
30. Insert Calendar, Note, Task, and Contact Folders.
31. You Don't HAVE to Use Outlook Folders to Save Your Emails.
32. What Is Outlook Today?
33. Other Customization Options and Settings
34. Empty the Deleted Items Upon Exiting.
35. Change the Font You Use to Compose Emails.
36. Change the Font and Size for Messages in List View.
37. Manage Your Inbox.
38. Remove the Attachment from a Message.
39. Use Automatic Formatting.
40. Make Notes in Someone Else's Email Message.
41. Use the "Out Of Office Assistant" Creatively.

42. Add Reminders to Your Flags to Follow Up on Email.
43. Set a Reminder on an Email for Someone ELSE.
44. Create a Distribution List.
45. Put a Sender in Your Junk Mail List.
46. Use AutoName.
47. Tag Your Comments with Your Name within an Email.
48. Use Stationery to Dress Up an Email.
49. Email a Document Directly from an Office Application.
50. Set Even More Email Options.
51. Find Related Messages.
52. View Any Two Outlook Folders at the Same Time.
53. Use Drafts, Outbox, and Sent Items.
54. Use Draft Emails as a Reminder.
55. Use Outbox to Draft Email When off Line.
56. Resend a Sent Item.
57. Use Sent Items to Set a Reminder.
58. Send a Previously Sent Item as an Attachment.
59. Turn on, Modify, and Filter the Daily To-Do List.
60. Enter a New Task with Minimal Information.
61. Create a New Task.
62. Schedule a Recurring Task.
63. Create a Regenerating Task.
64. Remove Completed Tasks from the List Rather than Cross Them Out.
65. Change the View in Your To-Do Bar to Make Sort Via Start Date.
66. Change Your To-Do Bar Preferences.
67. Capture an Email as a Task on the Task Pad.
68. Collapse Your Tasks on Your Calendar View.
69. Assign a Task to Someone Else.
70. View Assigned Tasks by Person Responsible.
71. Send a Status Update to the Assignor.
72. Modify Your Master Categories List.
73. Tag a Task with a Category.
74. Use Outlook for Project Management.
75. View Tasks for by Category/Project.
76. Filter the View to Sort Your Tasks.
77. Change the Task Options.
78. Print a Paper To-Do List.
79. Find a Task
80. Create Task Folders.
81. Schedule a Task Directly from Your Calendar.
82. Create a New Appointment for Yourself.
83. Create a New Recurring Meeting.
84. Share Your Calendar with Others.

85. Set Your Default Permission Level.
86. Turn an Appointment into a Meeting Invitation.
87. Compare Multiple Calendars to Find an Open Meeting Date/Time.
88. Make Changes or Reschedule a Meeting.
89. Process Meeting Requests and Responses for Someone Else.
90. Schedule or Update a Meeting for Someone Else.
91. Track Meeting Responses.
92. Cancel a Meeting.
93. Jump to a Date on the Calendar without Clicking.
94. Change the View of Your Calendar.
95. Display the Date Navigator to Easily Copy an Appointment.
96. Set Calendar Options.
97. Change the Color Labels in Your Calendar.
98. View Your Meetings by Category.
99. Create Separate Calendars.
100. Capture an Email as a Calendar Item.
101. Schedule Tasks from Your Task Pad on Your Calendar.
102. Print a Paper To-Do List.
103. Send Someone Else Your Calendar Via Email.
104. Notes – Category Lists, Clippings, Internet, Random Thoughts, Contact Info
105. Create a New Note.
106. Create Note Folders.
107. Keep Project Notes in Email Folders.
108. Move Notes between Folders.
109. Copy a Note.
110. Copy Information from another Microsoft Application.
111. Forward a Note.
112. Insert the Text of a Note into an Email.
113. Assign a Category to a Note.
114. Attach a Note to a Contact.
115. Add the View by Contact to Your List.
116. Use the Toolbar to View Your Notes.
117. Use the Navigation Pane to View Your Notes.
118. Share Your Notes.
119. Search for a Word or Phrase in a Note.
120. Print a Note.
121. Change the Default Note Style.
122. Turn Off the Time Stamp.
123. Journal – Document History, Conversations, Meetings, Phone Calls
124. Set up Automatic Tracking.
125. Type Directly Into the Journal.
126. Time the Length of a Phone Call to Track Billable Hours.
127. Change the Journal Views to be More Helpful.

128. Share Your Journal Entries.
129. Forward a Journal Entry.
130. Create Journal Folders for Different Projects or Clients.
131. Print Your Journal Entries.
132. Add People to Your Local Contacts.
133. Check to See if a Contact Already Exists.
134. Create Contact Folders as Address Books.
135. Select an Address Book When Emailing.
136. Put Your Contacts into Categories.
137. Display Contacts by Category.
138. Mail to an Entire Category.
139. Create a New Email, Meeting, Task, or Journal Entry for a Contact.
140. Link a Document to a Contact.
141. Display Contact History.
142. Share Your Contacts with Others.
143. Set Your Default Permission Level.
144. Change the Look of Your Electronic Business Card.
145. Send Someone Your V-Card.
146. Send Someone One of Your Contacts.
147. Send Contact Information as Text in an Email.
148. Attach Your Electronic Business Card to Every Outgoing Message.
149. Print an Address Book.
150. Export an Address Book to Excel or Another Program.
151. Set a Reminder to Call or Follow-Up with a Contact.
152. Add a Customized View.
153. Turn Off The Automatic Email Notification Options.
154. Create A RULE To Play A Sound For "Important" People.
155. Experiment with the Rules Wizard.
156. Use the New Item Shortcut Dropdown.
157. Dictate When You Receive Your Email, So It Doesn't Distract You.
158. Create Signatures to Use as Templates for Common Responses.
159. Use an Outlook Template for Letters.
160. Use Search Folders to Create AutoSearches.
161. Use Outlook Today to Quickly Jump Around within Outlook.
162. Use Outlook Keyboard Shortcuts.
163. Take a Poll and Tally Results.
164. Specify Which Address Book Opens First.
165. Find Messages Using the Find Bar.
166. Add Groups and Shortcuts in the Folder List.
167. Create a New Toolbar with Favorite Buttons.
168. Add Your Own Menu with Your Favorite Commands.
169. AutoArchive Old Mail to Reduce the Size of Your Mailbox.
170. Change the Auto Archive Settings for Specific Folders.

171. Archive Messages Manually.
172. Create or Open an Outlook Data File.
173. Cleanup or Reduce Your Mailbox Quickly and Easily.
174. Set the Importance and Sensitivity of a Message.
175. Keep Others from Being Able to Change Your Email Text.
176. Specify Delivery Options for Email.
177. Expire Messages When They No Longer Apply.
178. Have Replies Sent to Someone Else.
179. Delay the Delivery of a Message.
180. Categorize and View Emails in Groups.
181. Share Folders, Assign Delegates, and Specify Permissions.
182. Access Another Person's Folders.
183. Add Shared Documents to Public Folders.
184. View Your Outlook When You Are Not Connected.
185. Create Your Own Fields.
186. Add Your New Fields to Forms.
187. Make a Custom Form the Default in Another Folder.
188. Deleting a Form You've Designed.
189. Create a Customized Word Document, Letter, Envelope, Labels, or Email from Your Contacts.
190. Add an RSS Feed Through the Account Settings Dialog Box.
191. Add Heightened Security to Your Messages.
192. Consider Whether Outlook Should Even Be Used.
193. Match The Message To The Medium.
194. Remember That Informal Doesn't Mean Sloppy.
195. Use Regular Sentence Case.
196. Use BCC and CC Appropriately.
197. Remember Your E-Mail Isn't Private.
198. Be Sparing with Group Distribution Lists.
199. Use the Subject Field.
200. Don't Send Junk.
201. Don't Slow Down Your Reader: Learn Composition Rules.
202. Use Proper Signatures with a Phone Number.
203. Include Portions of the Original E-Mail in Your Response.
204. Time Requirements for Responses.
205. Be Courteous to the Reader and Don't Waste Time.
206. Expire Your Messages as a Courtesy.
207. Use the 4 C's of Great Email Communication: Clear, Concise, Correct, and Conversational.
208. Determine What Organizing Method Suits You: Paper, Electronic, or Hybrid.
209. Test For Environmental and Personality Style Email Factors.
210. Test for Cultural Email Factors.
211. Test for Work Location Email Factors.

212. Construct a Suspense File for Items You Print From Email.
213. Learn the Six Principles of Organization Necessary to Maintain an Empty Inbox.
214. Discover a Six-Step Decision-Making Tree to Help You Systematically Process Email.
215. Set Your Options to Auto-Delete Your Deleted Items.
216. Decide Which Messages to Delete.
217. Convert Emails to a Task and Assign the Task.
218. Activate Email for Future Response.
219. Follow Up on Pending Items.
220. Handle Messages When You're Waiting for a Response.
221. Convert Emails Automatically Into Tasks or Appointments with No Copying.
222. Remove Attachments from Emails.
223. Use Rules to Automatically Move Email to Personal Folders.
224. Add Messages to the Junk Senders List.
225. Understand the Six Mindsets You Need to Manage Email Successfully.