(a) \boldsymbol{a} æ a a a a Ş a D a a a D a a a a a an a Ca a a a \mathbf{a} a a a a a a a a a a \mathbf{a} a a (a)a a a a a a a a \mathbf{a} a CO (0) a a (a) (a) O 0 a a CD (0) a a a (a)a (0) O a a a æ a a C a a (a) a a a

Setting Up Tasks

IN MICROSOFT OUTLOOK VERSION 2003



By Laura Stack, MBA, CSP



LAURA STACK, MBA, CSP

Speaker (*) Author (*) Consultant



President and CEO

Laura Stack, MBA, CSP is America's premier expert in productivity. For over 20 years, her speeches and seminars have helped professionals, leaders, teams, and organizations improve personal productivity, performance, and potential. Her Denverbased company, The Productivity Pro, Inc., provides time management workshops around the globe to help attendees achieve Maximum Results in Minimum Time®. Laura was the 2011-2012 president of the National Speakers Association.

Keynoter

Laura presents over 80 practical, high-energy keynotes and seminars each year 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 personal productivity topics. Laura is a high-energy, high-content speaker, who educates, entertains, and motivates professionals to improve workplace performance. She has earned the Certified Speaking Professional (CSP) designation, the highest earned designation given by the National Speakers Association.

Author

Laura is the author or coauthor of 10 books, including What to Do When There's Too Much to Do; SuperCompetent; The Exhaustion Cure; Find More Time; and the bestselling Leave the Office Earlier. Her newest book, Execution IS the Strategy, will hit bookstores in March 2014. Her books have been published in twenty countries and translated into seven foreign languages, including Japanese, Spanish, Korean, Chinese, Taiwanese, Italian, and Romanian. Laura is a columnist for Training, Productive, Time Management, and Success magazines.

Recognized Productivity Expert

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, WB News, the New York Times, USA Today, the Wall Street Journal, the WashingtonPost.com, Entrepreneur, and Forbes magazine. Laura has been a spokesperson for Microsoft, 3M, Skillsoft, Office Depot, and Xerox.



Clients include

Starbucks	Sodexho
Тусо	Ball Aerospace
Wal-Mart	Quest
Cisco Systems	U.S. Bank
KPMG	McDonald's
Nationwide	Nestle
MillerCoors	EMC
Sunoco	Oppenheimer
IBM	Time Warner
MCI	Wells Fargo
Sprint	Visa
Enterprise	RE/MAX
Lockheed	Denver Broncos

Spokesperson

Microsoft	Xerox
3M	Day-Timer
OVC	Office Dedot

© 2013 Laura Stack, MBA, CSP. All rights reserved. The Productivity Pro, Inc., 9948 Cottoncreek Drive, Highlands Ranch, CO 80130 Phone: (303) 471-7401 ^(f) Web: <u>http://www.TheProductivityPro.com</u> ^(f) Email: <u>Laura@TheProductivityPro.com</u>



Setting Up Tasks

A task is a personal or work-related action item that you want to track until it's completed. A task can occur once or repeatedly. A recurring task can repeat at regular intervals or repeat based on the date you mark the task complete. For example, you might want to send a status report to your manager on the last Friday of every month, or get a haircut when one month has passed since your last haircut.

A. Filter The View In Your Calendar To Display The TaskPad (To-Do List).

- 1. Go to the Calendar. Make sure your Task Pad is showing on the right. If it's not, go to the **View** menu and select **Task Pad**.
- 2. Go to the **View** menu again and click **Task Pad View**.
- 3. Select **Active Tasks for Selected Days.** The task pad will now only display tasks with a Start Date of today or earlier.

B. Filter the View on the Task Pad

- 1. Right-click in the TaskPad.
- 2. Select Task Pad Settings, then Show Fields.
- 3. Add and remove fields until only Icon, Complete, and Subject are showing (in that order).

Show Fields Maximum number of lines in multi-line m Select available fields from: Frequently-used fields Available fields: Compare Actual Work Attachment Categories Company Contacts Date Completed Due Date Modified Notes Organizer Owner Priority Recipient Name	Add -> <- Remove	Show these field Icon Complete Subject	ds in this order:
<u>Properties</u> Delete		Move Up OK	Move <u>D</u> own

🔏 Calendar - Microsoft	Outlook	2 🙆 😳 🌉 🕗 .	8 🔟 🗷 🔀 🎾 💕	🙇 🕅 🔔 💶 🗗 🗙
Elle Edit ⊻lew ©o Id	ols <u>A</u> ction	ns Help Adobe EDF		ype a question for help 🔹
🗄 New 🔹 🎯 🗡 🏢 🐒	Today	🔲 Day 💈 Work Week 🏹 Week 🛐 Month 🙄 Find 🔛 Type a contact to find 🔹 🥹 🐯	💌 🔳 🖕 🛛 🚨 🧟	· 🔁 🖕
Folder List	Calend	lar 🛛		April 13, 2006 🥅
All Folders		Thursday, April 13	April 2006	May 2006 🕨
Personal Folders			26 27 28 29 30 31 1	123456
Calendar	o am		2 3 4 5 6 7 8	7 8 9 10 11 12 13
S Contacts			16 17 18 19 20 21 22	21 22 23 24 25 26 27
Drafts [1]	9 ⁰⁰		23 24 25 26 27 28 29	28 29 30 31 1 2 3
inbox Inbox	10.00		✓ TaskPad ∇	Start
🧑 Junk E-mail	10		Click here to add a new Tas	k in the second s
Laura's folders Image: Second state Im	11 ⁰⁰		There are no items to	show in this view.
Cutbox	12 pm			
Tasks	- 00			
E Archive Folders	1.00			
Folder Sizes	2.00			
Data File Management	300			
	400			
	5 ⁰⁰			
🗟 Mail	c 00			
Calendar	0			
S Contacts	700			
🕎 Tasks	800			
🦲 Folder List	900			
ŝ	10.00			
0 Items				
🐮 Start 🚱 🛛 💽 Cale	endar - M	Alcr 🖻 Student Workbo 🔯 ACT! - [peak pro]	« [3:45 PM

1



C. Remove Completed Tasks From the Task Pad.

1. Right click on the word TaskPad in the Task Pad (make sure you click the header, not inside the task pad.



- 2. Select Customize Current View.
- 3. In the Customize View: dialog box, click on the Filter button.
- 4. Click the Advanced tab.
- 5. Click on the Field button on the left side in the middle of the box.
- 6. Click Frequently-used fields.
- 7. Click Complete. The default Condition and Value will automatically be filled in with Complete, Equals, and No, which you want to keep.
- 8. Click the Add to List button.
- 9. Click OK to return to the View Summary Box.

				2 3 4
	Customize View:		kPad A	
	Description		k here to add a new Task	
	<u>F</u> ields	Icon, Complete, Subject		
cetr	Group By	None	Tasks More Choices Advanced SQL	×I
	<u>S</u> ort	Subject (ascending)	Find items that <u>m</u> atch these criteria:	
_	Filter	Tasks: Advanced	Complete equals No	
	Uther Settings	Fonts and other Table View setting	Remove	
	Automatic Formatting	User defined fonts on each messag	Define more criteria:	
	Format <u>C</u> olumns	Specify the display formats for eac	Field Condition: Value:	
	<u>R</u> eset Current View		Add to List	
			OK Cancel Clear <u>A</u> ll	
		-		

10. Click OK again.



D. Create a New Task.

- 1. On the File menu, point to New, and then click Task.
- 2. In the **Subject** box, type a task name.
- 3. Fill in the **Start Date** for the date you want the task to show up on your TaskPad.
- 4. Fill in the **Due Date** as applicable or different.
- 5. If you leave the Start Date and Due Date blank, it will still be in your Tasks list as a master task list item.
- 6. Complete any other boxes on the **Task** and **Details** tabs for information you want to record for the task.
- 7. To make the task recur, click Recurrence, click the frequency (Daily, Weekly, Monthly, Yearly).
- 8. Click OK, and then click Save and Close.

E. Capture an Email as a Task on the Task Pad.

- 1. Right mouse click the email (or if you're viewing the email, select File).
- 2. Select "Move to Folder" from the short cut menu (or File menu).

🗿 Inbox - Microsoft Outloo	k	= <u>#</u> 0 \$ # = = = 2 * * * •	149 <u>-</u> 7
Ele Edit View Go Ioo	is <u>A</u> ctions <u>H</u> elp Adobe <u>P</u> DF		ype a question for help 📼
: 🔂 New 🔹 🎒 🎦 🗙 🖓	Reply 🉈 Reply to All 🙈 Forward 📑 Sen	l/Regeive 🔹 🏠 🛛 📴 🧐 🥛 😧 Delete As Spam SpamBayes 🔹 📱 🗑 Snagit 😁	Region 🔹
Folder List	Inbox		<u>i</u>
All Folders	1 9 From	Subject	Received 🛛 🖗 🛆
🖃 🧐 Personal Folders	🖂 Mark Buzan	Elance project	Fri 11/25/2005 4: 🕅
Calendar	🧟 Greeley, Kristin	RE: FID RSM Meeting - Speaker Confirmation	Fri 11/25/2005 7: 🕅
S Contacts	B	Open	
Deleted Items		Print	
Inbox	4	Reply	
Journal	a a a a a a a a a a a a a a a a a a a	Reply to Al	
Dunk email	S	Forward	
junk suspects		Follow Up 🕨	
Laura's folders	M	Mark as Ugread	
Outbox		Categories	
Sent Items		Find All	
Tasks	🖄	⊆reate Rule	
		Junk E-mail	<u>×</u>
Folder Sizes Data File Management	RE: FID RSM Meeting - S ×	Delete	
	Greeley, Kristin [kristin.gre 🗳	Move to Folder agement.com	
	To: Laura@theproductivitypro.com 🔝	Ogtions	
	Cc: Chang, America J; Manser, Jennirer	n	
	Great!		<u></u>
	Could you also cc: America.J.Char	g@columbiamanagement.com	
	I will be out of the office next week.		
	Kristin Greeley		
	Columbia Management Distributors	, Inc.	
	Une Financial Center, MA5-515-14 Boston, MA 02111	05	
	617-772-3405		_
». *	Fax: 617-772-3533		
2 Ibems			
🛃 start 🛛 🔞 📓	051201 Columbia Ma O Tobox - Mirro	soft Out	🔦 🔘 🔀 📚 4:43 PM

- 3. Select Tasks from the list.
- 4. Click OK.



i Ble Edit View ⊊o Tools Actions Help Adobe EDF Type a question Dig Bew - J → X → Reply to Al → Forgard → Send/Regive - Al → Porgard → Send/Regive - Al → Porgard → Subject *** Send/Regive - Al → Porgard → Subject *** Subject *** Send/Regive - Al → Porgard → Subject *** Subject **	or help 🔍
Image: Second Product Image: Second Product Region Folder List Inbox All Folders Image: Second Product Received Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product Image: Second Product	₹ ₹ ₹ 7 ₹
Folder List Inbox All Folders I ⓐ [] from ⓐ [] orders ⓑ [] orders	₩ ▲ 4: ♥ 7: ♥
All Folders Subject Received ■ Control Forman Subject Received ■ Control Forman Subject Received ■ Control Forman Subject Pri 11/25/2005 ■ Control Forman RE: FID RSM Meeting - Speaker Confirmation Pri 11/25/2005 ■ Control Forman Subject	₩ <u>^</u> 4: ♥ 7: ♥
	4: 🕅 7: 🕅
Ortoker Ortoker Greeley, Kristin Move Items Move Items Move Items	7: 🕅
G Deleted Items ₩ Original Statements ■ Inbox Move Items	
Move Items	
Journal Move the selected items to the folder:	
Calendar OK	
B Laura's folders	
Construction Const	
i Join Atenio Journal	
Bunk E-mail	~
Folder Sizes BE- EID PSM Maet 8 July Solpeus	
Data He Management Greelev, Kristin Kris Coubox	
To: Lougetherpoductivity Sant Items	
Cc: Chang, America 3; Mar	
Great	
Livil to art of the office part weak	
Visite Oracles	
Columbia Management Distributors, Inc.	
One Financial Center, MA6-515-14-05 Boston, MA 02111	
617-772-3405 Fax: 617-772-553	~
2 Dens	
🛃 start 🖉 🖾 051201 Columbia Ma 🗿 Inbox - Microsoft Out	4:44 PM

- 5. This will activate a task properties window.
- 6. Update all of the information accordingly. Use the "Start Date" to indicate when you want the task to appear on your Task Pad. You can set a reminder here or even type notes to yourself.
- 7. Click the "Save and Close" button.

🗑 RE: FID RSM	Meeting - Speaker Co	nfirmation - Task		B 🙆 🖸	S 🔐 💌 🗷 🖉 🔁 🔁 🛤 🗀 🔍 🕰 🕓 🤇) _ 7 🗙
: File Edit Vi	ew Insert Format Io	ols <u>A</u> ctions <u>H</u> elp				
Book Antiqua	• 12 • <u>A</u>	BI∐∣≣				
Save and Cl	ose X 🖻 🛍 🛛 🤇	Recyrrence 🛛	Assign Task 🗞 🎺	X + + + 0 ,		
Task Details						
Subject:	Create Columbia Managem	ient workbook				
Due date:	None	Status: Not Start	ed	~		
Sta <u>r</u> t date:	None	Priority: Normal	🖌 % Complete: 0%	\$		
Reminder:	None 🗸	None 🗸	🞉 Owner: 🛛 Laura St	ack - The Productivity Pro(R)		
						~
RE: FID RS	1					
4eeting - Speak	er					
⊆ontacts					Categories	Private
🛃 start	🞯 🔯 051201 Co	lumbia Ma 🛛 🙆	Inbox - Microsoft Out	💱 RE: FID RSM Meeting	0	4: 44 PM



F. Assign a Task to Someone Else.

- 1. Select Tasks (or Go, Tasks).
- 2. Click "New."
- 3. Select "Assign task."



- 4. Select the delegate using "To" (just as you would with an email).
- 5. Enter the task in the Subject field.
- 6. In the Due Date and Start Date fields, enter the desired dates or select from the calendar.
- 7. Attach any files needed for the task.
- 8. Type a message with instructions in the Note area.
- 9. If you would like to keep an updated copy of the task on your task list or receive a status report when the task is complete, check the appropriate check boxes.

Task Det	ails			
This message	e has not been sent.			
То <u>.</u>	John Stack			
Subject:	Please book me a ticket to Boston for December 1 booking			
<u>D</u> ue date:	Thu 11/10/2005 💙 Status <u>:</u> Not Started 💙			
Sta <u>r</u> t date:	Mon 11/7/2005 🛛 Priority: 📕 🗸 % Complete: 0% 📚			
Keep an updated copy of this task on my task list				
\checkmark Send <u>m</u> e a status report when this task is complete				
See Colu	ımbia Management file for details.			

10. Click Send.

Note: The recipient can either Accept or Decline your task request, just like a meeting request. If accepted, it goes right to Tasks.



G. View Assigned Tasks by Person Responsible.

- 1. Select "Tasks" in the Navigation Pane.
- 2. Select by Person Responsible.

🧕 Tasks - Microsoft Outlook	
[:] <u>F</u> ile <u>E</u> dit <u>V</u> iew <u>G</u> o <u>T</u> ools <u>A</u> c	tions <u>H</u> elp Adobe <u>P</u> DF
🗄 🌌 <u>N</u> ew 🔻 🆪 階 🗙 😰 Find	🞯 🥯 💂
Tasks	Tasks
My Tasks	D : 0 Subject
😨 Tasks 🎅 Tasks in Archive Folders	Click here to add a new Task
Current View	🖪 Owner: John Stack (1 item)
 Simple List Detailed List 	Owner: Laura Stack (20 items)
 Active Tasks Next Seven Days 	Owner: Laura Stack - The Productivity Pro (7 items)
 Overdue Tasks By Category 	
 Assignment By Person Responsible 	
 Completed Tasks Task Timeline 	
Open Shared Tasks Customize Current View	

H. Create Your Master Categories List.

- 1. Create a new task.
- 2. Click the "Categories" button in the lower right-hand corner of the window.
- 3. Click "Master Category List" button in the lower right-hand corner of the Categories dialog box. This is the MASTER category list that is used in all functions of Outlook (Contacts, Calendar, etc.)
- 4. Delete any Categories you don't need for your type of tasks (almost all the defaults). Click on the unused category term, then click remove. Or hold down the shift button when selecting to remove a list of categories at once.
- 5. Add the category terms you want to use by typing in the text box at the top and clicking "Add." Add projects, committees, people, geographical areas, etc., that describe the categories of tasks you work.



I. Tag a Task with a Category.

- 1. Create a new task.
- 2. Click the Categories button at the bottom left of the task.
- 3. Check the appropriate boxes to describe the task (plus the rest of the pertinent information).

Categories	P

4. Save and Close.

J. View Tasks for by Category/Project.

- 1. Select "Tasks" in the Navigation Pane.
- 2. Select by Category.

111

🛨 Categories: .Projects: Business (4 items)
Categories: @Action (2 items)
🗉 Categories: Christina Blakely (2 items)
🌍 🔲 [Laura Stack - The Productivity Pro, Time Management, Getting Things Don
🎅 🔲 Never lose anything againnew Super Portable Computer
Categories: Create blog on gardening (2 items)
Categories: James Patterson (2 items)
🌍 🔲 Re: Foundation at Denver
🌍 🔲 Re: Foundation at Denver



Educational Resources by Laura Stack

Subscribe to the Productivity Minute! Watch a <u>one-minute</u> personal performance video each week, delivered via email: <u>www.theproductivitypro.com/productivityminute/</u>

eBook of screenshots of amazing Microsoft Outlook Task Tricks by Laura Stack: <u>www.TheProductivityPro.com/download.htm</u>

Download the Laura Stack app for a free eBook! <u>www.TheProductivityPro.com/app</u>

What to Do When There's Too Much to Do book site: <u>www.TheProductivityPro.com/WhatToDo</u>

Laura's YouTube channel: http://www.youtube.com/theproductivitypro

Link with me! http://www.linkedin.com/in/laurastack

Join our LinkedIn Group, The Productivity Pro® Alumni, to exchange ideas and insights: <u>http://www.linkedin.com/e/vgh/1259217/</u>

Follow me! http://twitter.com/laurastack

Become a Fan of The Productivity Pro®: <u>www.facebook.com/productivitypro</u>

Sign up for my free weekly productivity newsletter, The Productivity Pro®: <u>http://www.theproductivitypro.com/r_subscribe.htm</u>

Laura's blog: http://www.theproductivitypro.com/blog/

Over 150 free articles for download and reprint for your company website, newsletter, or blog: <u>http://www.TheProductivityPro.com/articles</u>

12 hours of Microsoft Outlook online video training with workbooks: <u>http://www.TheProductivityPro.com/outlook</u>

FREE downloadable worksheets, checklists, and resources: <u>http://www.theproductivitypro.com/r_free_stuff.htm</u>

Take the quizzes FREE from Laura's books: <u>http://www.theproductivitypro.com/r_quizzes.htm</u>

Get a FREE tip of the day via email: <u>http://www.theproductivitypro.com/r_subscribe_365Tips.htm</u>

Resources for purchase (books, CDs, DVDs, self-study audio, video training, MP3s etc.): <u>http://www.theproductivitypro.com/t_productivity_tools.htm</u>