Setting Up Tasks

IN MICROSOFT OUTLOOK VERSION 2010

The PROductivity PRO®

Maximum Results. Minimum Time®

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 Denver-based 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.

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Task: Something You Need "To Do" that Does NOT Need to be Completed at a Specific Time

A. Create a New Task with Complete Information.

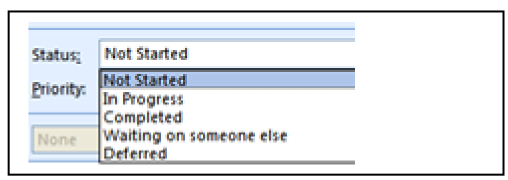
1. Click on Tasks in the Navigation Pane
2. In the New group, click the New Task button.

Fill in as much or as little as you wish; we'll cover the fields in this top section first. The tab key moves you through the fields in this order:

1. In the **Subject** box, type the name of the task. This is actually the only field you have to enter to create a task.

2. The **Start Date** is when you want to begin working on it (the day you want it to appear on your daily to-do list). If you only fill in the Due Date, the Start Date is left at "None," which is read as if you are starting the task today. (Same text tricks apply.) *HINT: If you leave the Start Date and Due Date blank, it will still be in your Task list as a master task list item.*

3. The **Due Date** is when the task must be finished. You can enter a specific date, or you can type in a text string, and Outlook will figure out what date corresponds with it: "The first Friday of July," or "three weeks from Friday," and it will autofill the correct date.



4. **Status** (optional) is where you are on the Task. If you haven't started, leave it on Not Started.

5. **Priority** (optional) by default is normal, but you can choose high or low. No real functionality here.

6. **% Complete (**optional**):** as applicable

7. **Reminder** (if you want the reminder pop-up box to come up before it's due). We'll soon see that this isn't necessary, because you'll use the built-in reminder.

8. **Text box:** enter notes and instructions about the task and any other information you'll need to complete it (hyperlinks, etc.).

9. There are many other options under the Task, Insert, Format Text, and Review tabs.

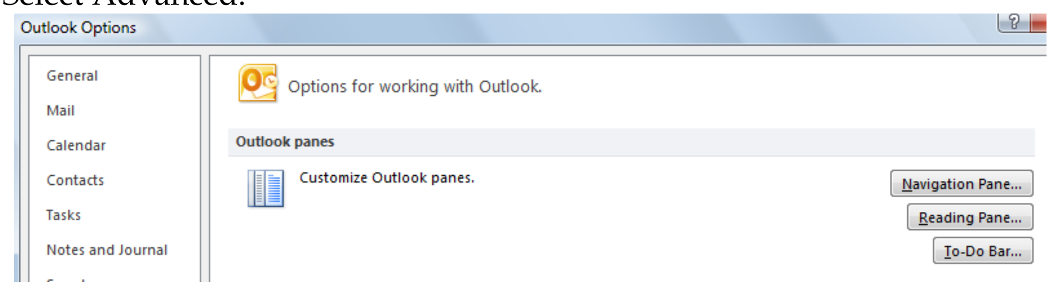
B. Change the View in Your To-Do Bar to Make the Daily To-Do List Work Via Start Date.

1. Make sure your To-Do bar is showing on the right. If it's not, click the arrows to expand. (You can always collapse it again if it's in the way.) The To-Do bar stays open whether you're in Calendar, Contacts, Inbox, etc., so you can always refer to your to-dos.

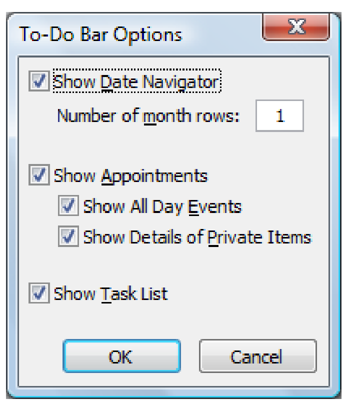
2. Under the Arranged by: option, select Start Date and Show in Groups. This will make sure you see the task on the day you need to begin working on it, not the day it's due!!

C. Change Your To-Do Bar Preferences.

1. Under the File tab, click Options.
2. Select Advanced.



3. Under Outlook panes, select To-Do Bar.

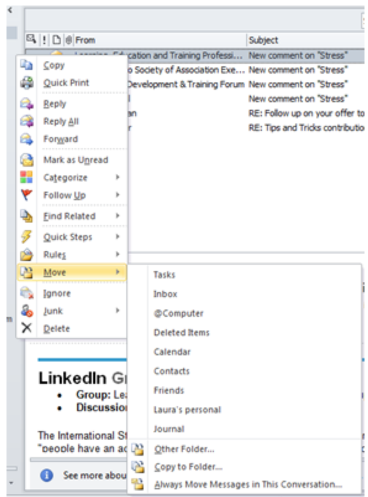


4. Check all boxes and set options as desired.
5. Click OK.

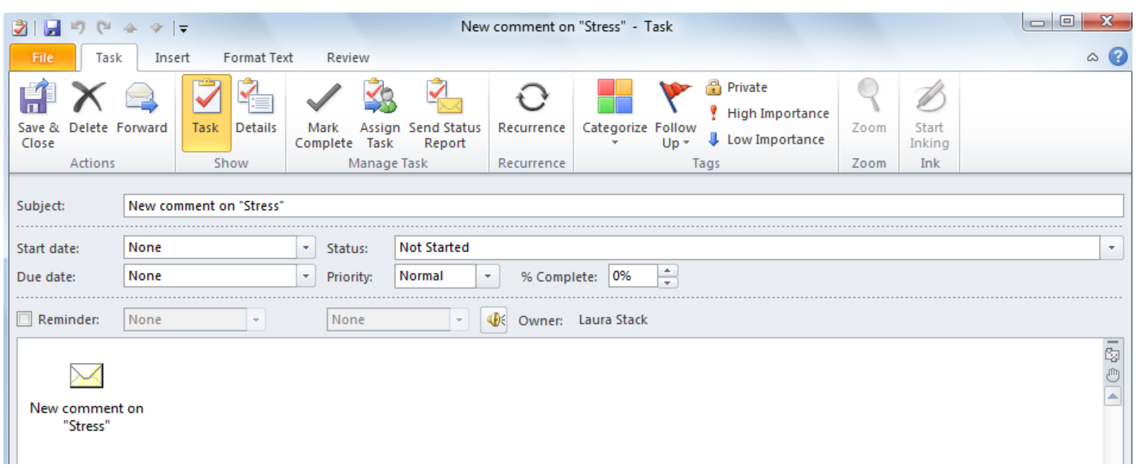
D. Convert an Email into a Task.

DISCUSSION: why flagging email only creates a "To-Do" and not a Task; why is this a bad idea and why should you instead convert it into a Task?

1. Right-click on the email (or open the email).



2. Select Move from the short cut menu (or if you're viewing the email, select Move under the Move group).
3. Select Tasks from the list (or Other Folder if you've not done this step before).
4. Click OK.
5. This will create a new Task (your email will be in the text portion of the Task, including all attachments; if you opened the email, you'll also have the text of the email in the Task underneath):



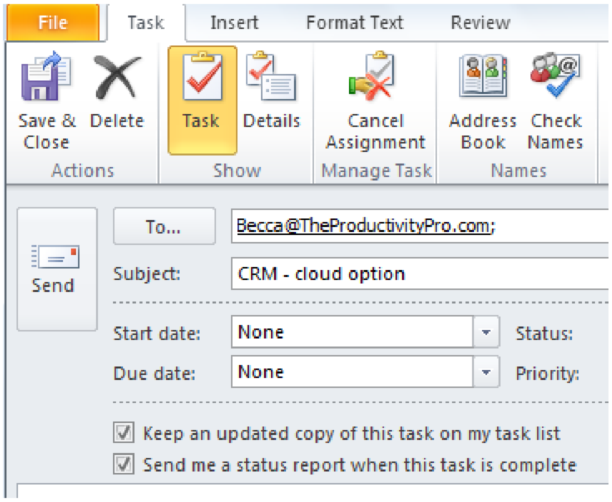
6. Update all of the information accordingly. Don't forget—use the Start Date to indicate when you want the Task to appear on your To-Do Bar under your Today flag (daily to-do list). You can set a reminder here or even type notes to yourself.
7. Click the "Save and Close" button. The email will be moved from your inbox to your tasks (the original is in your Deleted Items if you want to file it, or create a copy first before you move it to a task).

Bottom line, does flagging an email create a Task? NO!!! It simply adds the message to the To-Do bar. You can't assign it to others or track its status, and if you complete/unflag it, the to-do is gone, but the email remains in the Inbox. This is how email piles up! Flags also sort by DUE DATE, not start date, so often you are reminded too late to complete it. If you MUST flag email instead of converting them to Tasks, right-click the flag and select CUSTOM, so you can specify Start and Due Dates.

E. Assign a Task to Someone Else.

1. Select Tasks click New Task.
2. In the Manage Task group, select Assign Task.

3. Select the delegate using the TO field (just as you would with an email).
4. Enter the task in the Subject field.
5. In the Start Date and Due Date fields, enter the desired dates or select from the calendar.
6. Attach any files needed for the task.
7. Type a message with instructions in the Note area.
8. 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.

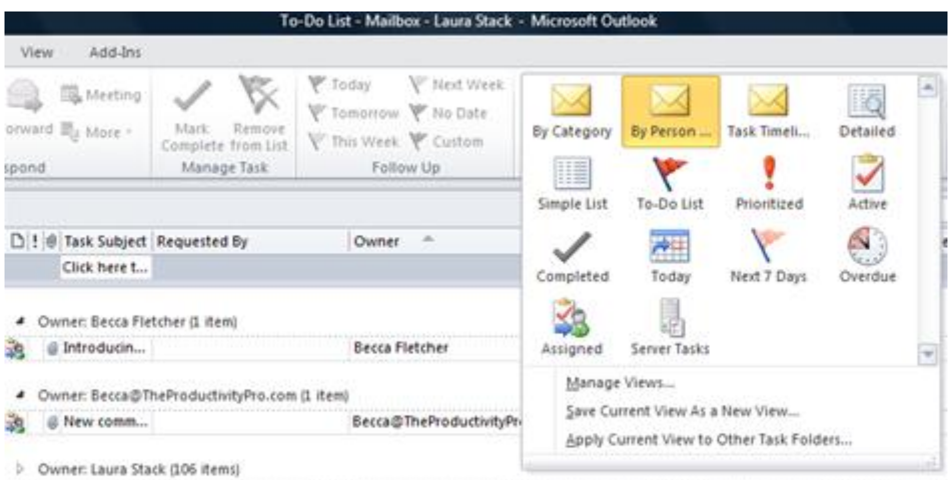


9. Click Send.

NOTES: The recipient can either Accept or Decline your task request, just like a meeting request. If accepted, it goes right to Tasks. They now own it, and you can't make changes. You can also Assign a Task when you Move it to Tasks from the Inbox.

F. Group Assigned Tasks by Person Responsible.

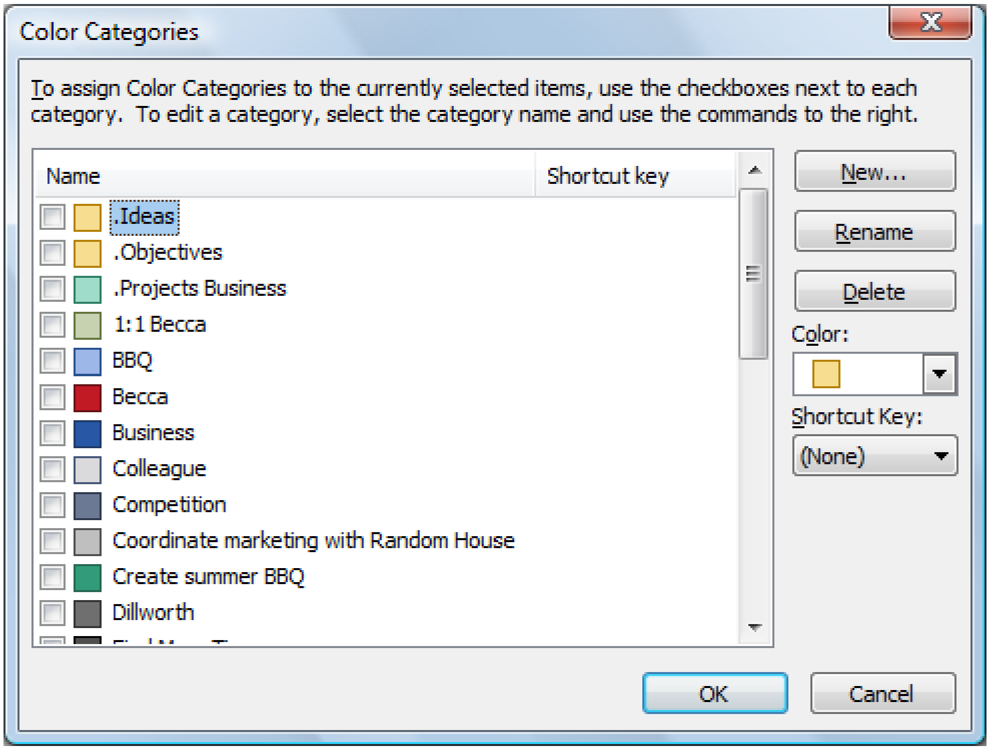
1. From the Current View Group, select by Person Responsible.
2. If not visible on the screen, click the More arrow in the lower right corner to expand the View choices.



3. Open and close the tasks for each person as desired to view.

G. Modify Your Master Categories List.

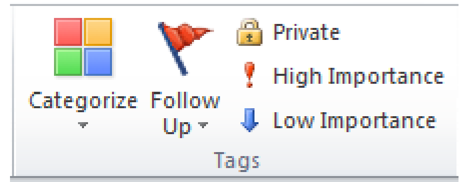
1. Start a New Task.
2. In the Tags group, click Categorize.
3. Select All Categories.



4. In the Color Categories dialog box, rename the categories to reflect your projects, committees, people, geographical areas, etc., that describe the categories of tasks you work.
5. Delete any that aren't in use to make your list smaller (you can always add them back in later).
6. If you like a particular color that isn't in use, select New… and pick the color from the list.
7. Hint: if you put a period in front of the category name, it goes to the top of the list. You can create a Category for each project and add it to your master project list. Here are some categories you could use:
   - .Projects: Business
   - .Projects: Personal
   - .Ideas
   - .Objectives

H. Tag a Task with a Category.

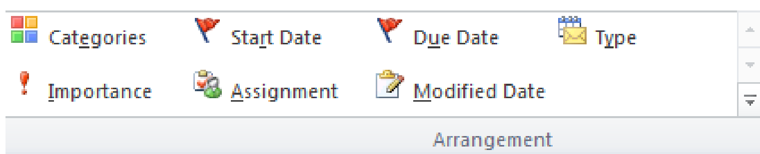
1. Create a New Task (for each step of the project).
2. In the Tags group, click the Categorize button.
3. Select the appropriate Category name or names (you can tag a task with multiple categories).
4. Save and Close.



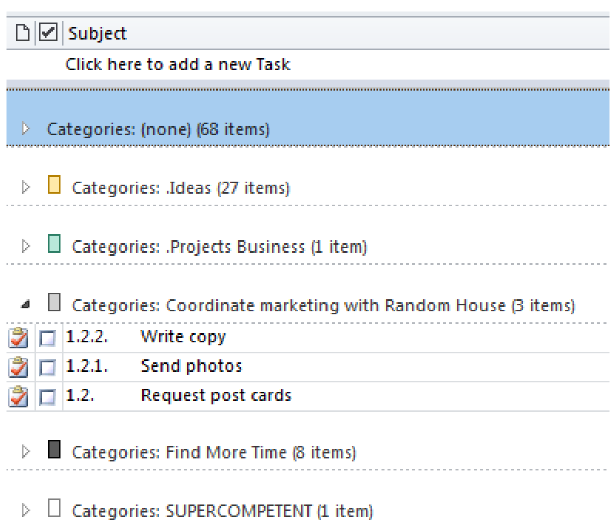
Hint: create an overall project plan in one task, tagged with the .Projects: Business category, and then copy/paste each individual step of the project into its own Task, Categorized by the project name itself.

I. Group Tasks by Category. The view is simply how you're looking at your data for that filter (how you arrange it).

1. Select Tasks in the Navigation Pane.
2. Click the View tab.
3. In the Arrangement group, click Categories (or any other desired view).

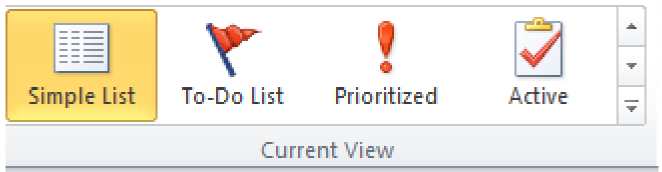


4. Open and close the Categories by clicking the arrow next to each category to see all open tasks for that category/project.

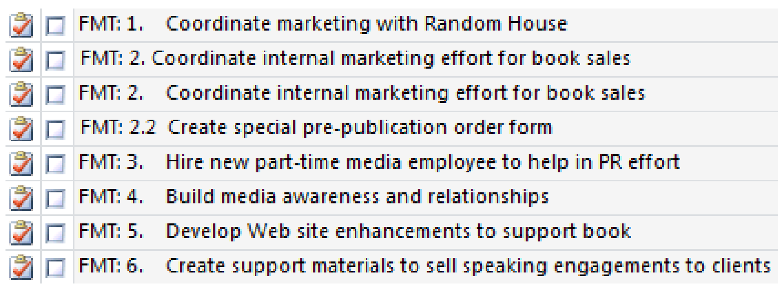


J. Filter the View to Sort Your Tasks. The Current View filter shows you a subset of your tasks. Then you can click the View tab to arrange them in a particular order.

1. Select Tasks from the Navigation Pane.
2. From the Home tab, under the Current View group, select Simple List.



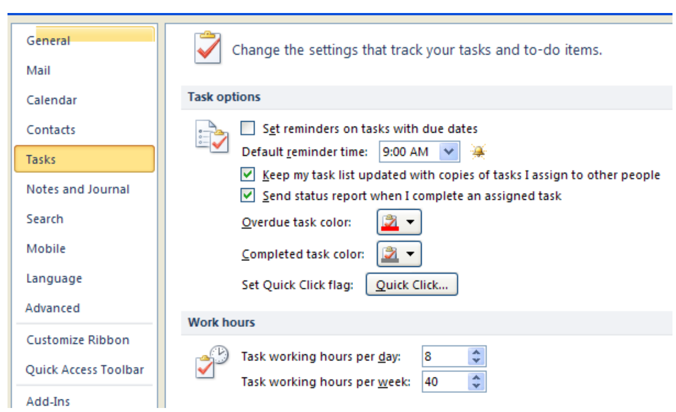
3. Click the Subject column. Hint: If you always start the Subject with the same project name, code, or numbered list, all your tasks can now sort in alphabetical order and stay together:



4. Or click Completed Tasks for example in the Current View, then click the View tab and in the Arrangement group, select Date Completed to see the most recent you completed.

K. Change the Task Options.

1. Under the Tools menu, select Options.
2. Next to the Task Options button, set the default reminder box time (I use 9:00).
3. Select Task Options.
4. Choose colors and check boxes.



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