Setting Up Tasks

IN MICROSOFT OUTLOOK VERSION 2003

The PROductivity PRO®

Maximum Results. Minimum Time®

By Laura Stack, MBA, CSP

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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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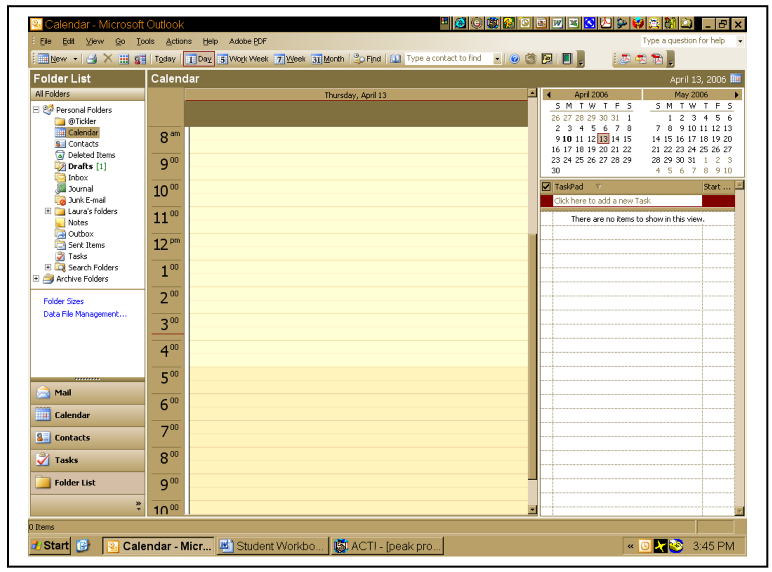
Setting Up Tasks

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.

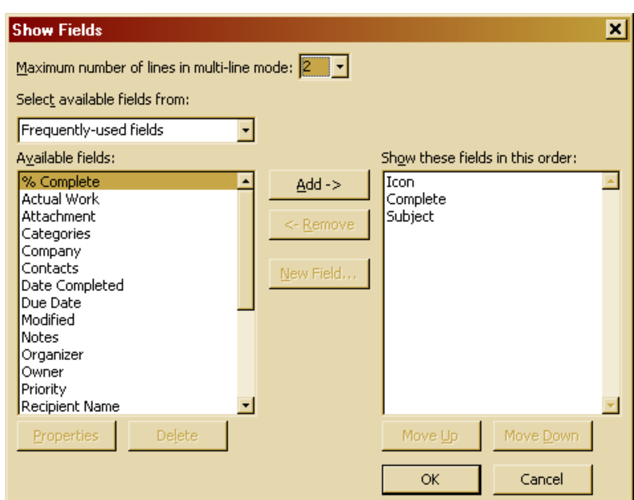
A. Filter The View In Your Calendar To Display The TaskPad (To-Do List).



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).



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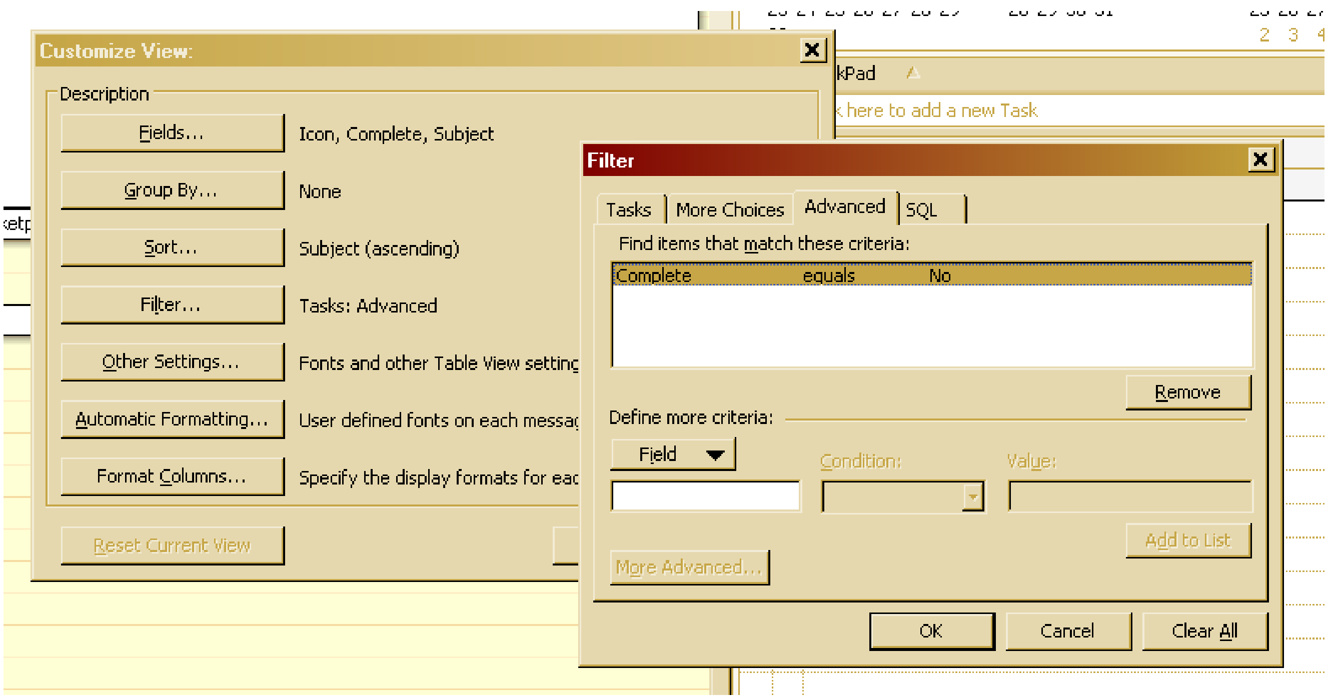
C. Remove Completed Tasks From the Task Pad.

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.



10. Click OK again.

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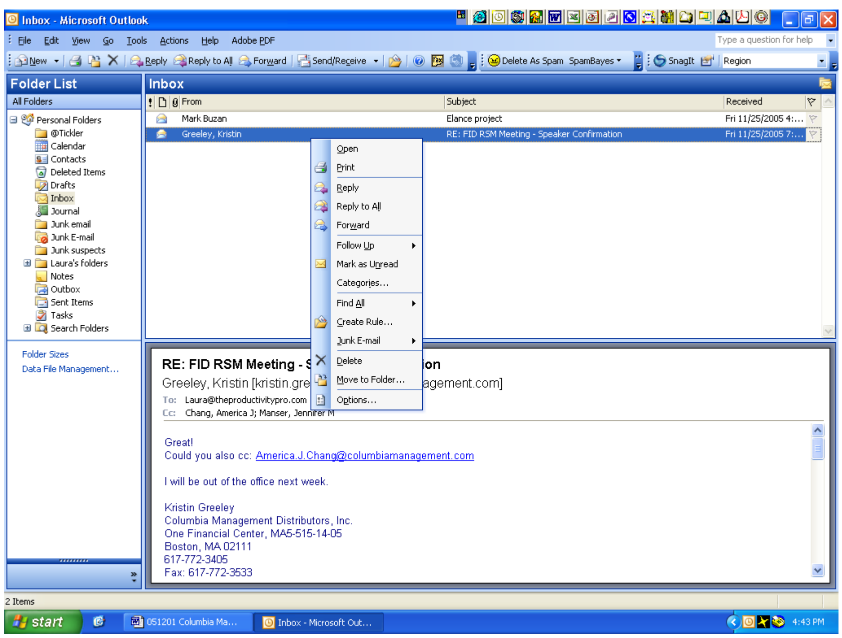
D. Create a New Task.

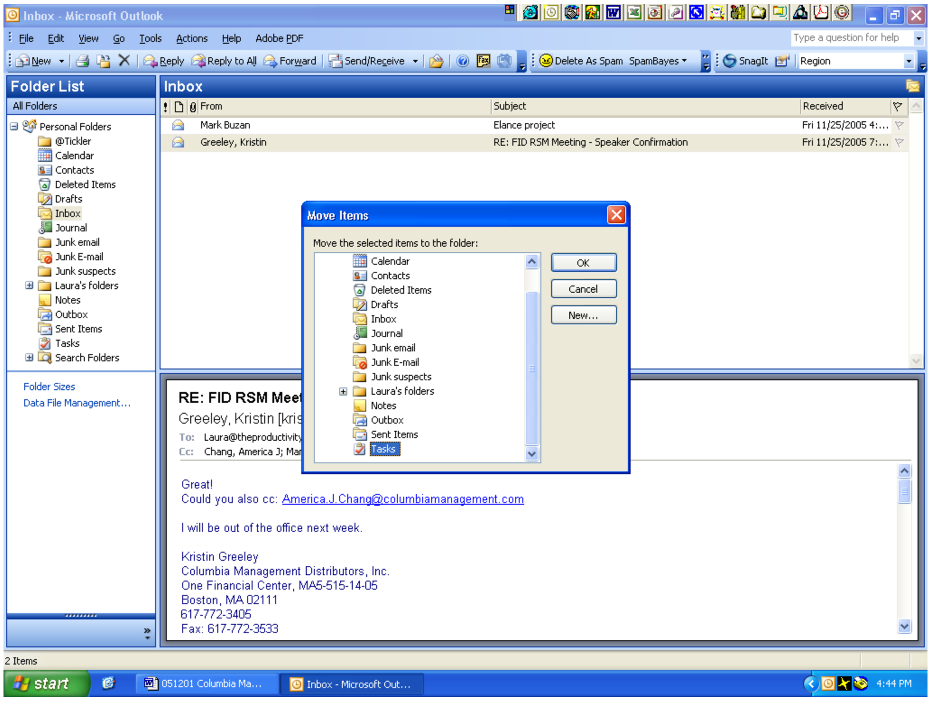
1. On the **File** menu, point to **New**, and then click **Task**.
2. In the **Subject** box, type a task name.
3. Fill in the **Start Date** for the date you want the task to show up on your TaskPad.
4. Fill in the **Due Date** as applicable or different.
5. If you leave the Start Date and Due Date 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.

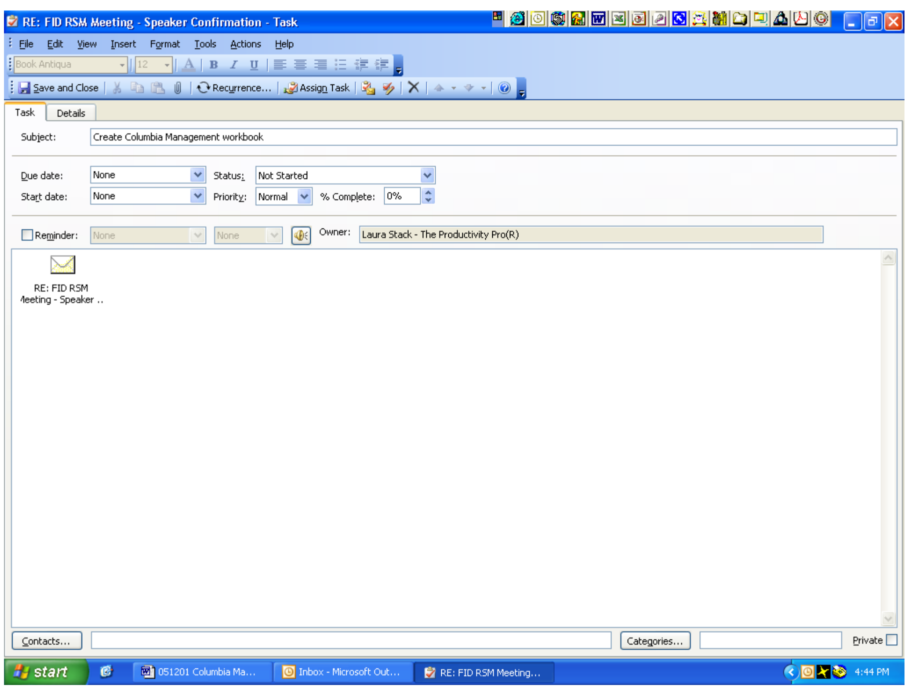
1. Right mouse click the email (or if you're viewing the email, select File).
2. Select "Move to Folder" from the short cut menu (or File menu).



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

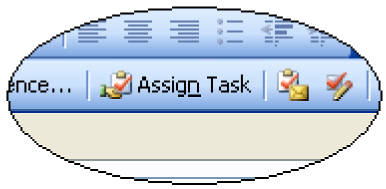


5. This will activate a task properties window.
6. Update all of the information accordingly. Use the “Start Date” to indicate when you want the task to appear on your Task Pad. You can set a reminder here or even type notes to yourself.
7. Click the “Save and Close” button.

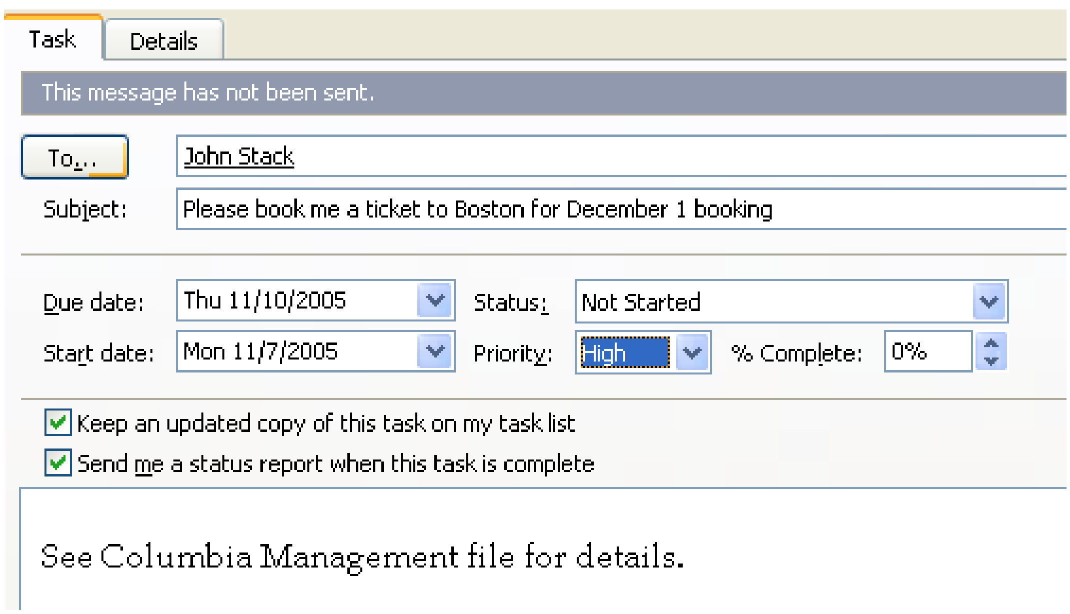


F. Assign a Task to Someone Else.

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.



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.

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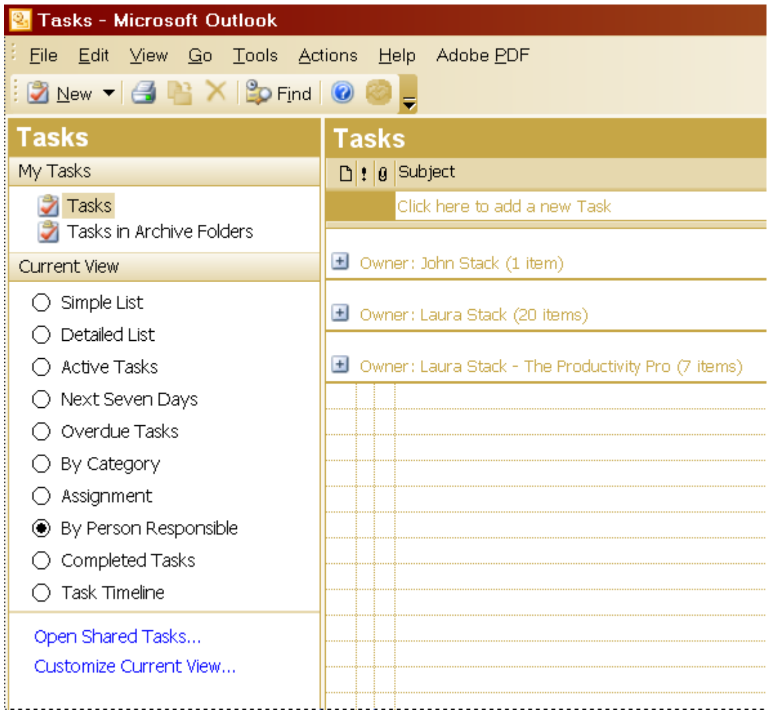
G. View Assigned Tasks by Person Responsible.

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

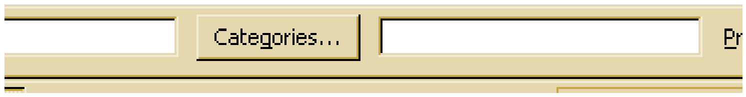


H. Create Your Master Categories List.

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.

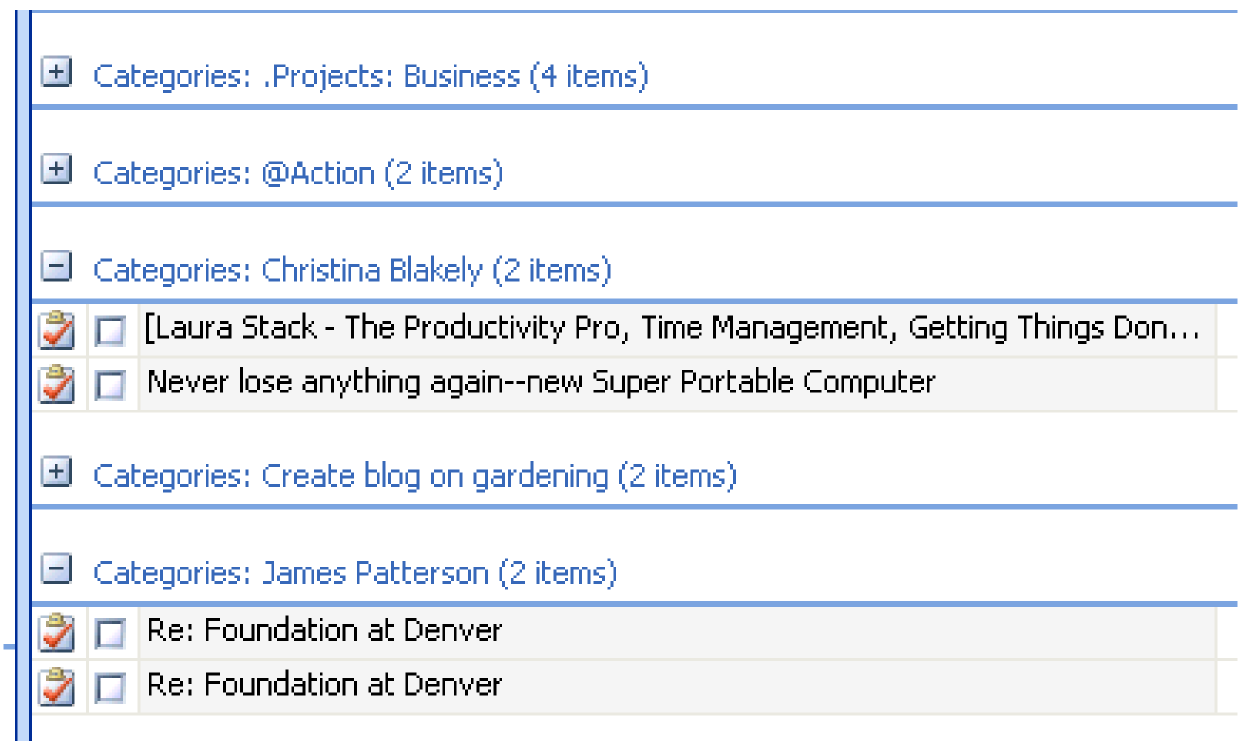
1. Create a new task.
2. Click the Categories button at the bottom left of the task.
3. Check the appropriate boxes to describe the task (plus the rest of the pertinent information).



4. Save and Close.

J. View Tasks for by Category/Project.

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



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