Microsoft Outlook 2013

SCREEN SHOTS ON HOW TO USE TASKS

LAURA STACK
TURNING STRATEGY INTO PERFORMANCE

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Maximum Results. Minimum Time®

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Laura Stack, MBA, CSP helps companies turn strategy into performance. For 22 years, her keynotes and seminars have helped leaders, teams, and professionals execute efficiently, improve output, and build high-performance cultures. Her company, The Productivity Pro, Inc., provides productivity workshops around the globe on business performance, strategy execution, and employee productivity. Laura was the 2011-2012 president of the National Speakers Association.

Keynoter

Laura presents high-energy 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 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 of six bestselling productivity books published by Random House, Wiley, and Berrett-Koehler, most recently *Execution IS the Strategy: How Leaders Achieve Maximum Results in Minimum Time*. Laura's books have been published in more than 20 foreign editions, and she is a featured columnist for the Business Journal and *Success* magazine.

Recognized Productivity Expert

Laura has been featured nationally on the CBS Early Show, CNN, NPR, Bloomberg, the New York Times, USA Today, the Wall Street Journal, Entrepreneur, and Forbes magazine. Laura has been a spokesperson for Microsoft, 3M, Skillsoft, Office Depot, Day-Timer, and Xerox. Her client list includes top Fortune 500 companies, including Starbucks, Wal-Mart, Aramark, Bank of America, GM, Wells Fargo, and Time Warner, plus government agencies such as the Internal Revenue Service, the United States Air Force Academy, the Census Bureau, the U.S. Senate, and the Department of Defense.
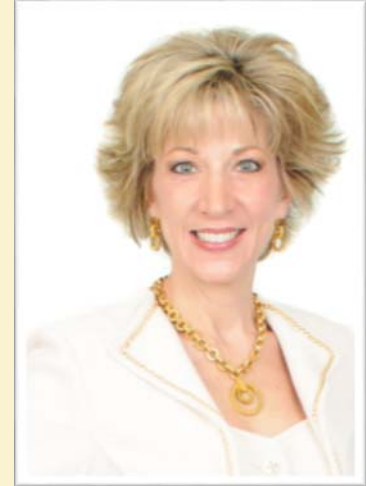
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Task: Something You Need "To Do" that Does NOT Need to be Completed at a Specific Time

A. Create a New Task with Minimal Information. This method doesn't provide a lot of data about your task but gets it in the system quickly.

1. Click on Tasks in the Navigation Pane
2. Under the Current View group, select Simple List.
3. A little box at the top of the Task list says, "Click here to add a new Task":
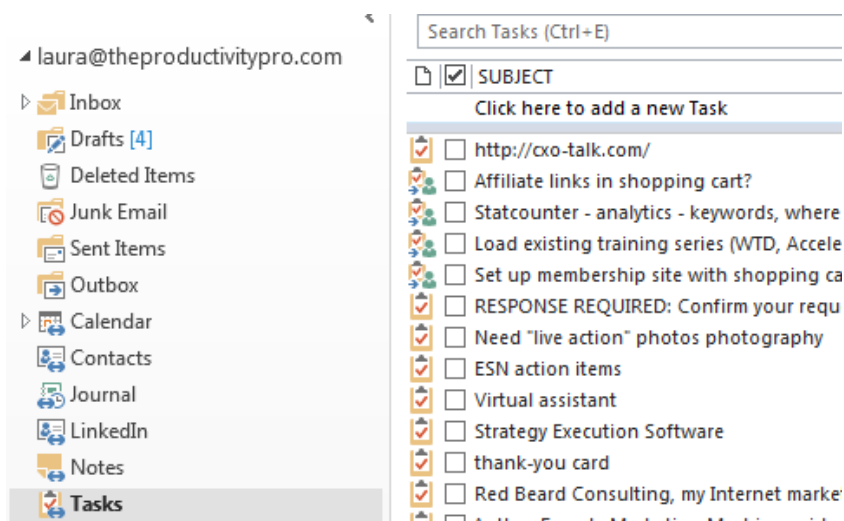
4. After you click, those words disappear and your cursor starts blinking. Type the information in the list (by default only Subject and Due Date) by tabbing over.

5. Hit the Enter key, and the task will automatically get added to the list below.

B. Create a New Task with Complete Information.

> *DISCUSSION: the difference between the MASTER and DAILY to-do lists.*

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

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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 memory list item under the "No Date" flag.)

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 Thursday," 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.

C. **Schedule a Recurring Task.** These are great for quarterly tax payments, monthly newsletters, weekly plant watering, etc. You enter the task once, and Outlook will automatically create the next task for you.

1. In the Recurrence group, click the Recurrence button.
2. Select the frequency in the left column (Daily, Weekly, Monthly, Yearly). Each choice changes the exact choices available for when the task recurs.
3. Click OK, and then click Save and Close.
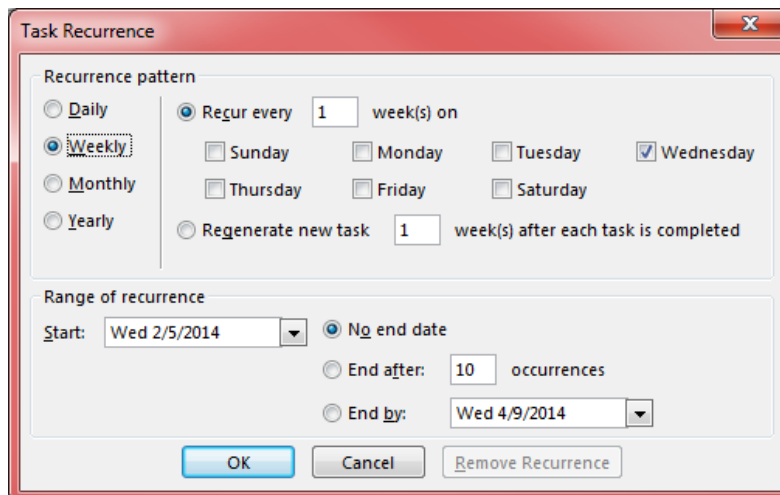
D. **Create a Regenerating Task.** This is different than a recurring task in the sense that the next one is only scheduled a certain time period after you mark the last one complete. So let's say you generally like to post a blog entry every Friday, but you missed last Friday and didn't get to it on Tuesday. A regenerating weekly task would now schedule the next posting for the following Tuesday.

1. In the Recurrence group, click the Recurrence button.
2. After selecting the Recurrence button, select the "Regenerate…" option instead:

E. Remove Completed Tasks from Your View Rather than Crossing Out.
You'll need to repeat this procedure for any views that have strike-outs.
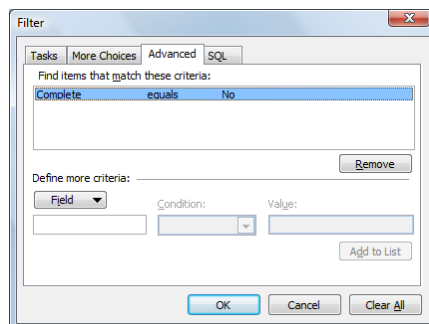
1. Click on Tasks and click the View tab.
2. In the Current View group, select the view to change (Simple List, etc.).
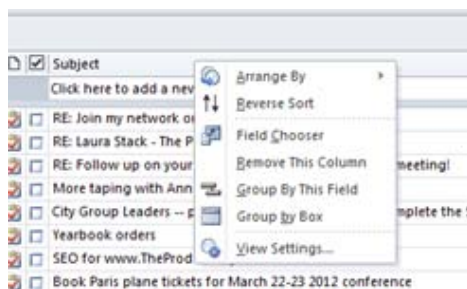
3. Right-click in the header of any field.
4. Select View Settings.
5. In the Customize View: dialog box, click on the Filter button.
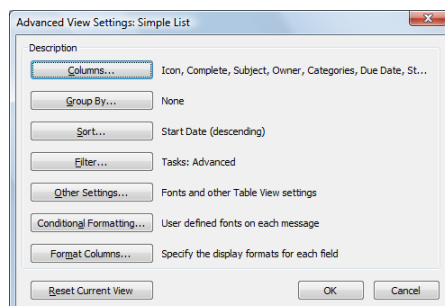

6. Click the Advanced tab.

7. Click on the Field button on the left side in the middle of the box.
8. Click Frequently-used fields.
9. Click Complete.
10. The default Condition and Value will automatically be filled in with Complete, Equals, and No, which you want to keep.

11. Click the Add to List button.
12. Click OK to return to the View Summary Box.
13. Click OK again.
14. When you check the Complete box, it will now be removed from the Simple list. It's not deleted! When you click the Completed Tasks view, all your tasks are there.

*(HINT: To mark a task complete directly from the To-Do Bar, right click and select Mark Complete.)*

F. Change the View in Your To-Do Bar.

1. At the top of your to-do bar, click the heading called "Arranged by." In the drop-down, select Start Date (instead of Due Date) and also 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.
2. Click View Settings…
3. In the Advanced View Settings: To-Do List dialog box, click on the Filter button.
4. Click the Advanced tab.
5. Click on the Field button.
6. Click Frequently-used fields.
7. Click Owner.
8. The default Condition and Value will automatically be filled in with Owner, contains, which you want to keep.
9. In the Value field, type your first name.
10. Click the Add to List button.
11. Click OK to return to the View Summary Box.
12. Click OK again. Now only YOUR tasks (not those you've assigned) will show in the To-Do bar.
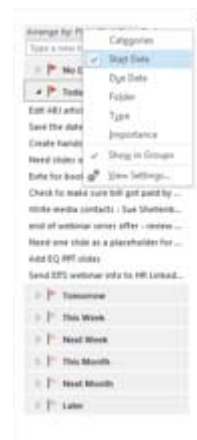
G. Convert an Email into a Task. Why flagging email only creates a "To-Do" and not a Task; why is this a bad idea?

1. Open an email.
2. From the Move group, click the Move button. (You can also right-click from the inbox).

P a g e | **7**
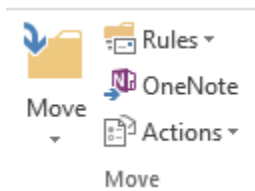
3. Select Tasks from the list (or Other Folder if you've not done this step before).
4. Click OK.
5. This will create a new Task. The text of your email will be in the text portion of the Task. At the very bottom of the text field, you will see an envelope. This is your original email with all attachments.
6. Update all of the information accordingly (use the Start Date to indicate when you want the Task to appear on your To-Do Bar under your Today flag. You can set a reminder here, type notes to yourself, insert files, etc.
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).

Bottom line, does flagging an email create a Task? NO! It simply adds the message to the To-Do bar. If you reply and clear the flag, the to-do is gone, but the email remains in the Inbox. This is how email piles up! 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 and delete the email once you reply to it.

H. 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. Enter the desired Start Date and Due Date.
6. Attach any files needed for the task.
7. Type a message with instructions in the Note area.
8. Make sure the "Keep an updated copy of this task on my task list" and "Send me a status report when this task is complete" boxes are checked.

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. If they decline it, you'll see it back in your task list.

I. Group Assigned Tasks by Person Responsible.

1. Click on Tasks.
2. Click on the View tab.
3. In the Current View Group, select Change View.
4. Click Assigned.

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

J. Send a Status Update to the Assignor. You can periodically know the person how you're progressing on a task (personal or assigned):
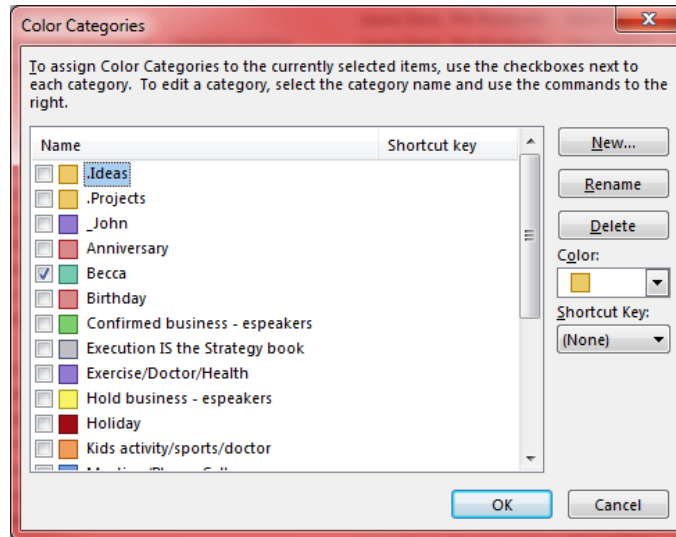
1. Open the Task.
2. Under the Manage Task group, select Send Status Report.
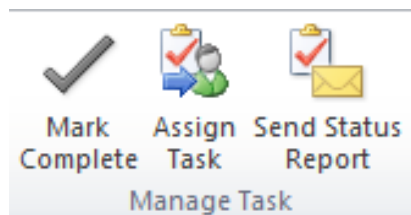
3. Fill in the TO field.
4. Type a note to the person as usual.
5. Click Send.

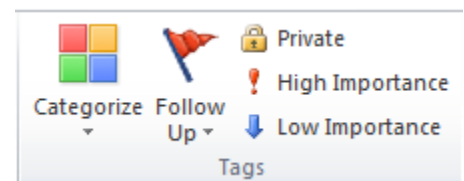## K. Modify Your Master Categories List.

1. Click on Tasks.
2. In the Tags group, click Categorize.
3. Select All Categories (at the bottom):

4. In the Color Categories dialog box, rename the categories to reflect your projects, responsiblities, 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. Here are some categories you could use:
   - .Projects: Business
   - .Projects: Personal
   - .Ideas
   - .Objectives

L. 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.

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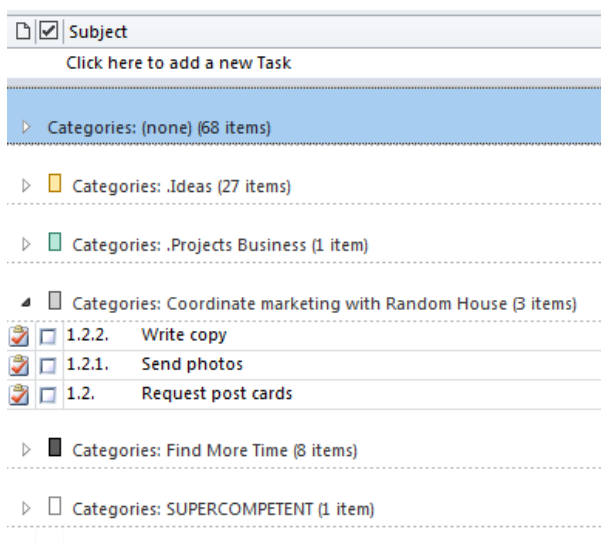Phone: (303) 471-7401 ☺ Laura@TheProductivityPro.com ☺ Facebook.com/ProductivityPro

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.

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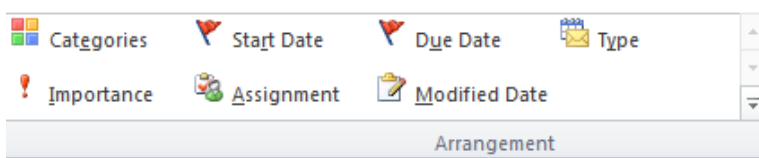
4. Open and close the Categories by clicking the arrow next to each category to see all open tasks for that category/project.

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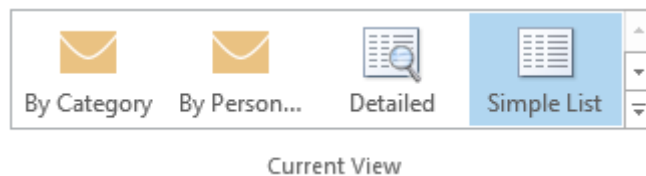
3. Click the Subject column. Hint: If you always start the Subject with the same project name, code, or numbered list, all your tasks can now sort in alphabetical order and stay together:

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.

O. Change the Task Options.

1. Click the File tab and select Options.
2. Select Tasks.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.
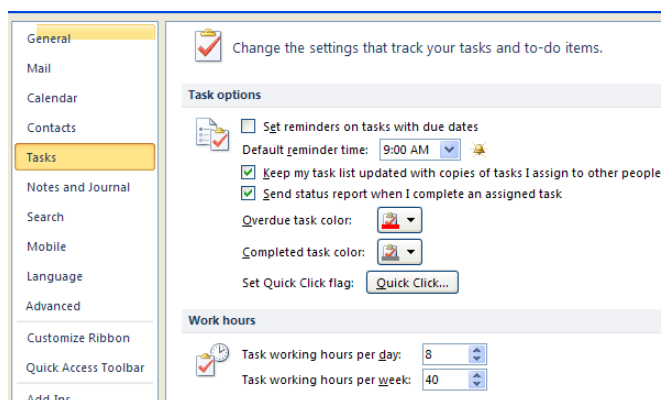
P. Print a Paper To-Do List. If you have a handheld device that syncs with Outlook (usually Microsoft Exchange), you can reference and create them when you're away from your computer. However, if you don't have an electronic device or like to carry a paper copy with you, do the following:

1. Click Tasks from the Navigation Pane.
2. Under the File tab, select Print.
3. Choose Table Style to print the entire master task list (list view).
4. Click the Print Options to make changes in paper, margins, etc. (measure the paper you use for your planner size and manually feed through your printer).
5. Click the Preview button to see what the printout will look like.
6. Click OK when finished.

Hint: You can also open or highlight one specific task, and then choose Memo Style when you print.

Q. Find a Task. In the upper right corner of any view (simple list, completed, assigned, etc.), type the term you're looking for in the Search box.
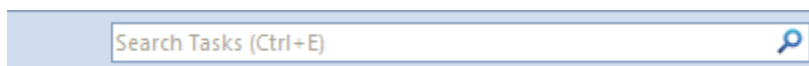
R. Create Task Folders. You can organize your Tasks into Folders, just like you do with email, for different areas of your life (volunteer work, kids, personal, etc.).

1. Right-click on Tasks.
2. Choose New Folder.
3. Type the name of the folder.
4. Under Folder contains: make sure Task Items is selected
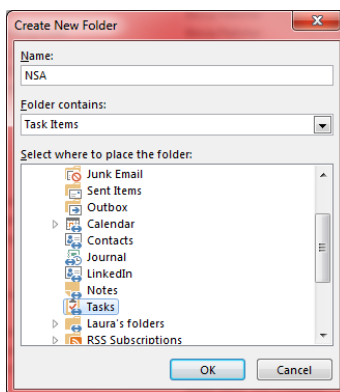
5. Click OK. You now have a blank to-do list for that area of your life.

S. Block Out Time on Your Calendar to Work on a Task.

1. Click your Calendar.
2. Open the Tasks on the bottom by clicking the arrow on the right.

Show tasks on: Start Date	Start Date
Create model; write productivity book - see McGhee presentation...	Fri 2/7/2014
Update free stuff menu option - can be much more robust and le...	Fri 2/7/2014
Virtual courses - how is Becca coming on this?	Fri 2/7/2014
2014 Speaker Author PR Toolkit	Fri 2/7/2014
Paid one-year Execution Leadership Training series	Fri 2/7/2014

3. Right-click on the Show tasks on: and select By State Date and unselect Show Completed Tasks.
4. Click and drag a Task up to your calendar to put a block on your calendar to work on that particular task. If you don't get to it, just leave it (no need to delete—the task will be there the next day).

T. Create a New Task Right from an Appointment. Let's say you have some work to do to prepare for an upcoming meeting. You need to create a Task but don't want to manually include all the information you've already entered into your calendar.

1. Open your calendar to view the appointment.
2. Click and drag the appointment to Tasks.
3. A new Task will automatically open with the appointment information copied into the text portion of that Appointment.
4. Fill out the relevant information (Start and Due dates, etc.)
5. Save and close.

U. Share Your Tasks With Others. Perhaps you want a co-worker to be able to see your Tasks, or a group of people all share a "pool" of master tasks. You can easily share your Tasks, just as you share your calendar.

1. Right click on Tasks.
2. Select Share and then Share Tasks.
3. Fill in the person's name you wish to share with and click Send.
4. When they accept, they may now open your Tasks. Click File, Open & Export, Other User's Folder.
5. Type the name and change the Folder type to Tasks.

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What to Do When There's Too Much to Do book site: www.TheProductivityPro.com/whattodo

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