Using Microsoft Outlook 2003

to Store, Plan, Track, and Accomplish Tasks and Projects

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Using Electronic Systems to Manage Priorities

Electronic systems, such as Microsoft Outlook 2003, provides simple, yet powerful methods of storing, sorting, comparing, searching, *never forgetting* and prioritizing all tasks. All tasks, stored in one system, can be conveniently reviewed in any way desired.

Guidelines for using Microsoft Outlook

- Open Microsoft Outlook 2003 and click on the Tasks button.
- Click on File, click on New, click on Task – an Untitled Task window appears.
- In the Untitled Task box enter a task on the subject line. Use the guidelines from the "Guidelines for Writing Tasks" on page 3. Example: Call Bill Jones (713) 224-1987 about financial backing.
- If the task is a Must Do (M) or a Need To Do (N) click on Due Date. Leave the rest of the boxes as is.
- Click on the down arrow of Due Date and click on the appropriate date.
- Check the Reminder box only if the task is a Must Do (M).
- If the task is a Must Do (M) check the Reminder box and enter a date and time. Put reminder dates only on Must Do tasks and appointments. Too many reminders causes overwhelm. (Putting a time on this task does not make it an appointment. It is still a task, just with a reminder on it).

Call Bill Jones (713) 225-9001 RE: Remodeling financing - Task

File Edit View Insert Format Tools Actions Help

Save and Close | Recurrence... | Assign Task

Task | Details

Due in 4 days.

Subject: Call Bill Jones (713) 225-9001 RE: Remodeling financing

Due date: Fri 3/7/2008 Status: Not Started

Start date: None Priority: Normal % Complete: 0%

Reminder: Fri 3/7/2008 8:00 AM Owner: Unknown

Contacts... Categories... Delegated To Mary, Must Do Bus Private

Calendar

Contacts

Tasks

Prepare for the meeting on Friday

Review the final figures for creating the new division

Review the monthly status report for duplications

Review the plans for the department with Bill

Review this quarter's sales figures

Send proposal to Jim to review

Send the department information to HR

Filter Applied 34 Items

- Go to the bottom right corner of the box to the Categories button.

- On the Categories box that appeared click on the Master Category List button.

- Click on each of, or highlight all of, the categories Microsoft gave as the default categories and The Delete button will appear. Do not delete categories that you are currently using in the Calendar, Contacts, or e-mail sections. Click on the Delete. Button. All of the Microsoft categories will disappear.

- In the area named New category put in the following new 6 Core Categories and other categories you need. With each new category you enter click Add

✔ Must Do Business	✔ Must Do Personal
✔ Need To Do Business	✔ Need To Do Personal
✔ Want To Do Business	✔ Want To Do Personal

In addition to the core categories add the following:

✔ Delegated to and the name of person(s) you delegate to
✔ Project Bus: Name of project. (Business project)
✔ Project Per: Name of project. (Personal project)
✔ 6 Strategic Tasks I Have To Do Today

Category Check Boxes

When you have finished entering the categories you click OK and OK again to set up the new categories for your use. Then click categories again and the following box will appear. You now see only the categories you want to use.

Check the category boxes that are appropriate for this task and they will each appear in the blank box at the top named "Item(s) belong to these categories:

Click OK and the following screen reappears. The categories checked appear in the Categories window in the bottom right corner of the Task window.

Click Save and Close.
Enter in all of your tasks with appropriate information.

CAUTION!

Viewing all of your tasks at one time causes overwhelm

Do not look at all of your tasks at the same time because you will get overwhelmed and your mind will shut down. The Master Task System is designed to allow you to look at all of the tasks you have to do by the Categories *you* created.

Viewing tasks within the categories created

To see your tasks sorted by the categories you just created, click on the button named View, then move the cursor to Arrange By and you will see the following drop down window.

Select Categories from the drop down list and following window appears.

Viewing only the individual categories you created without the tasks showing

To see just the categories you created without the tasks showing, (recommended) move the cursor to the word View again and click it

One of the choices you have in that drop down menu is Expand/Collapse Groups. Click Expand/Collapse Groups and choose Collapse All Groups, as shown below

Now you see *only* the categories you created without the tasks showing, as shown below.

Ways to review the Master Task List

Review by Must Do Business category open.

*****To sort the tasks, grouped by Category in Due Date order, perform the following actions:**

You do this so that you can view and then accomplish the tasks in date order

With the tasks grouped by their categories:

Click View, Click Arrange By,

Click Current View, Click Customize Current View,

Seminar Tasks - Microsoft Outlook
File Edit View Go Tools Actions Help
Type a question for help
New
Arrange By
Expand/Collapse Groups
Categories
Current View
Simple List
Detailed List
Active Tasks
Next Seven Days
Overdue Tasks
By Category
Assignment
By Person Responsible
Completed Tasks
Task Timeline
To-Do List
Customize Current View...
Define Views...
Format Columns...
Tasks
(Filter Applied)
My Tasks
Tasks
Seminar Tasks
Current View
Simple List
Detailed List
Active Tasks
Next Seven Days
Overdue Tasks
By Category
Assignment
By Person Responsible
Completed Tasks
Task Timeline
To-Do List
Open Shared Tasks...
Customize Current View...
Mail
Calendar
Contacts
Tasks
Due Date
Categories: 6 Most Important Tasks
Categories: Delegated to Jim (1 item)
Categories: Delegated to Mary (5 ite
Categories: Must Do Business (3 item
Categories: Must Do Personal (3 item
Categories: Need To Do Business (22
Get brought up to speed on the fi Mon 3/3/2008
Show the final Jones report figure Mon 3/3/2008
Prepare for the meeting on Friday Mon 3/3/2008
Drag my task emails into my Maste Tue 3/4/2008
Get all of my tasks into Outlook Tue 3/4/2008
Sent thank you notes for last week Tue 3/4/2008
Get the latest information on building costs Tue 3/4/2008
Send the department information to HR Wed 3/5/2008
Give the performance reviews to Jim to review Wed 3/5/2008
Create a program for department rules Thu 3/6/2008
Get the sales and expense numbers for Jim at the bank Thu 3/6/2008
Call Harold Williams (356) 533-9012 RE: Friday meeting Thu 3/6/2008
Call Jerry Wilson (303) 556-9873 about the proposal updates Thu 3/6/2008
Get all the accountability tasks into Outlook Fri 3/7/2008
Get writing on the book Fri 3/7/2008
Review this quarter's sales figures Fri 3/7/2008
Send proposal to Jim to review Fri 3/7/2008
Change the location of the meeting room Sat 3/8/2008
Review the plans for the department with Bill Sat 3/8/2008
Build a financial model for the processing project Sat 3/8/2008
Filter Applied 34 Items
Master Task System ...
Seminar Tasks - Mic...
11:15 AM

Click Group By,

Click the down arrow in Sort Items by,

Click Due Date,

Click Ascending,

Click OK

Click OK again.

Review by Need To Do Business category open.

Seminar Tasks - Microsoft Outlook

File Edit View Go Tools Actions Help

New Find Type a contact to find

Type a question for help

Tasks

My Tasks

- Tasks
- Seminar Tasks

Current View

- Simple List
- Detailed List
- Active Tasks
- Next Seven Days
- Overdue Tasks
- By Category
- Assignment
- By Person Responsible
- Completed Tasks
- Task Timeline
- To-Do List

Open Shared Tasks...

Customize Current View...

Mail

Calendar

Contacts

Tasks

Seminar Tasks (Filter Applied)

Subject	Due Date
Categories: Need To Do Business (22 items)	
Get brought up to speed on the final information from Bill Harrison	Mon 3/3/2008
Show the final Jones report figures to Jim	Mon 3/3/2008
Prepare for the meeting on Friday	Mon 3/3/2008
Drag my task emails into my Master To Do List in Outlook	Tue 3/4/2008
Get all of my tasks into Outlook	Tue 3/4/2008
Sent thank you notes for last week	Tue 3/4/2008
Get the latest information on building costs	Tue 3/4/2008
Send the department information to HR	Wed 3/5/2008
Give the performance reviews to Jim to review	Wed 3/5/2008
Create a program for department rules	Thu 3/6/2008
Get the sales and expense numbers for Jim at the bank	Thu 3/6/2008
Call Harold Williams (356) 533-9012 RE: Friday meeting	Thu 3/6/2008
Call Jerry Wilson (303) 556-9873 about the proposal updates	Thu 3/6/2008
Get all the accountability tasks into Outlook	Fri 3/7/2008
Get writing on the book	Fri 3/7/2008
Review this quarter's sales figures	Fri 3/7/2008
Send proposal to Jim to review	Fri 3/7/2008
Change the location of the meeting room	Sat 3/8/2008
Review the plans for the department with Bill	Sat 3/8/2008
Build a financial model for the processing project	Sat 3/8/2008
Call Mike Scott (800) 701-8953 RE: Categorization	Thu 3/13/2008
Review the monthly status report for duplications	Wed 3/26/2008
Categories: Need To Do Personal (4 items)	
Categories: Proj Bus: Book (1 item)	
Categories: Proj Bus: Jones Project (2 items)	
Categories: Proj Bus: Rebuilding Processing Department (6 items)	

Filter Applied 34 Items

Master Task System ... Seminar Tasks - Mic... 11:09 AM

Review by 6 Most Important Tasks Category open.

Seminar Tasks - Microsoft Outlook
File Edit View Go Tools Actions Help
New Find Type a contact to find
Type a question for help
Tasks
My Tasks
Tasks
Seminar Tasks
Current View
Simple List
Detailed List
Active Tasks
Next Seven Days
Overdue Tasks
By Category
Assignment
By Person Responsible
Completed Tasks
Task Timeline
To-Do List
Open Shared Tasks...
Customize Current View...
Mail
Calendar
Contacts
Tasks
Seminar Tasks
(Filter Applied)
Subject
Due Date
Categories: 6 Most Important Tasks Today (6 items)
Give the performance reviews to Jim to review
Wed 3/5/2008
Get the sales and expense numbers for Jim at the bank
Thu 3/6/2008
Get writing on the book
Fri 3/7/2008
Review this quarter's sales figures
Fri 3/7/2008
Send the final payment to the Jones Company (2/10)
Fri 3/7/2008
Change the location of the meeting room
Sat 3/8/2008
Categories: Delegated to Jim (1 item)
Categories: Delegated to Mary (5 items)
Categories: Must Do Business (3 items)
Categories: Must Do Personal (3 items)
Categories: Need To Do Business (22 items)
Categories: Need To Do Personal (4 items)
Categories: Proj Bus: Book (1 item)
Categories: Proj Bus: Jones Project (2 items)
Categories: Proj Bus: Rebuilding Processing Department (6 items)
Categories: Proj Bus: Seminar on Accountability (5 items)
Categories: Proj Bus: Vacation in Hawaii (1 item)
Filter Applied 34 Items
Master Task System ...
Seminar Tasks - Mic...
11:12 AM

Reviewing project tasks with a project category open

Review task with “Delegated to” categories open

Creating a Recurring Task

With a task open click Recurrence and the following screen will appear

The following window appears

Click the appropriate information and click OK

General guidelines for using Microsoft Outlook

- Put only appointments in the Calendar section. Put only appointments there.
- Put reminders only on Must Do tasks (S) and appointments
- Use Outlook and the only location for tasks.
- Copy and paste, or drag, any tasks delegated via e-mail, into your Task Section of Outlook. Create a task out of it with the correct subject. It will also stay as an email, as well