Get Organized!
…with Outlook Tasks

A Guide for Mastering
Your Task List

Dr. Frank Buck

For over 10 years, Outlook had been the vehicle through which I managed my life. It was my calendar, the hub for all of my tasks, a very complete contacts list, and warehouse for reference information. Because these four modules, together with email, are part of one integrated program, the various components work well together.

As I work with other people, I find Outlook to be available to a large number of them. Most use Outlook to send and receive email. Few, however, use the other components.

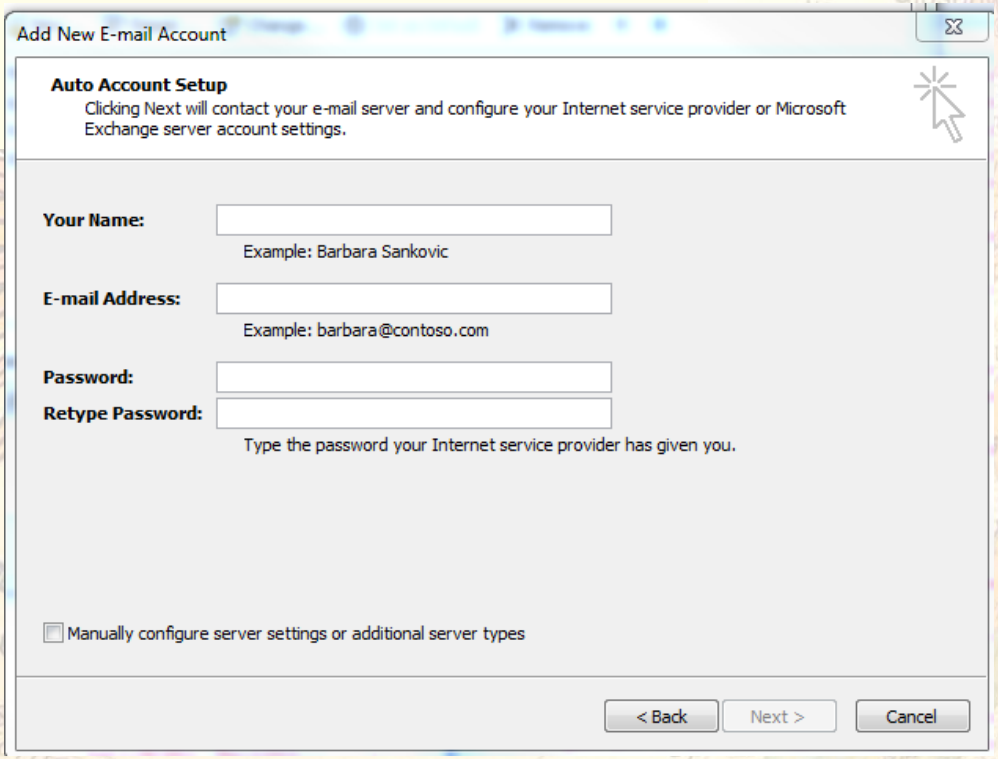
“Tasks” is the most universally underutilized part of Outlook. Much of the reason is lack of clear methodology for setting up and operating the *Task List*. This guide will focus on helping you with a setup which is simple and easy to maintain. You will learn a methodology which can be transferred to other software.

Readers will be working from different versions of Outlook. This publication will address the major concepts which apply to all Outlook users.

Opening Outlook for the First Time

When you open the program, you are asked if you want Outlook to be your *default email program*. Answer “yes.”

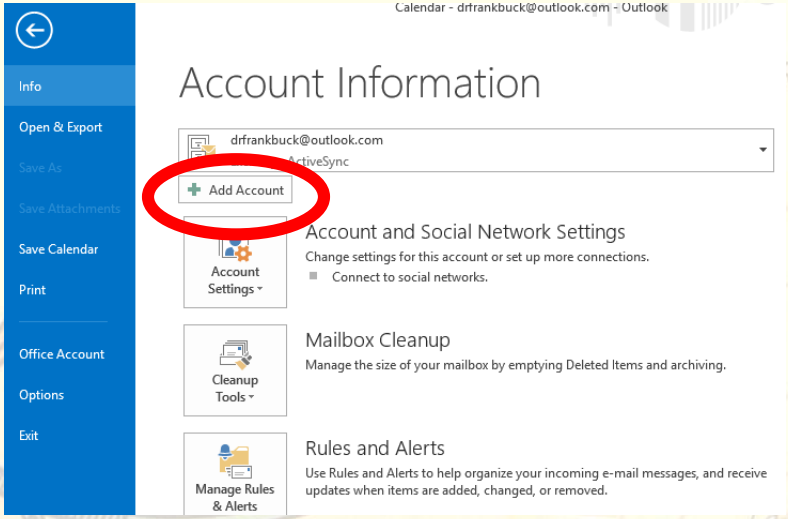
Outlook will guide you through the process of adding your email accounts.



Adding Additional Email Accounts

You may have one email address for work and another for personal use. You may have several additional email accounts. Outlook will check all of your email accounts. You simply have to add each account together with the necessary information, such as the email password.

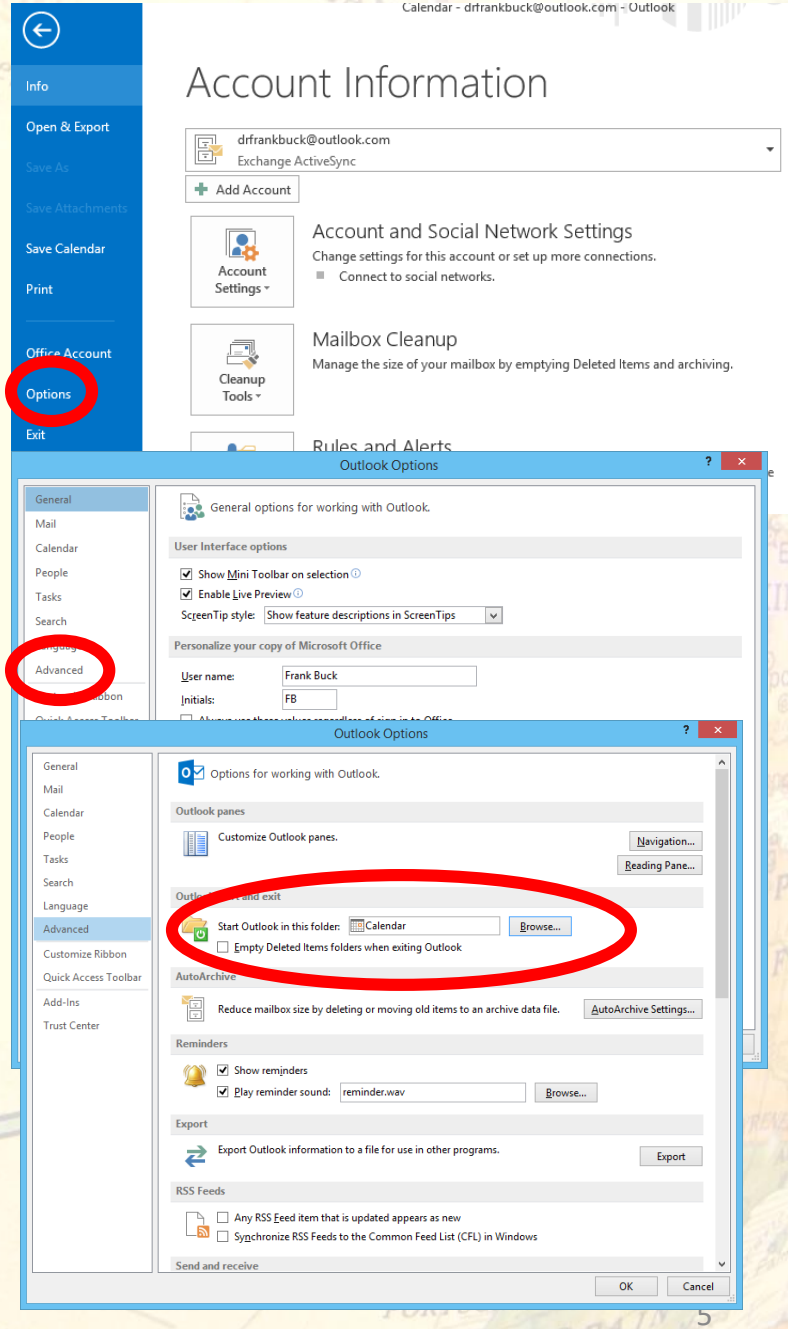
From any module in Outlook, select “File.” You will see a button where you can add an additional account.



Setting Outlook to Open to the Calendar

By default, Outlook opens to email, but you can change that. My preference is to have Outlook open to the Calendar.

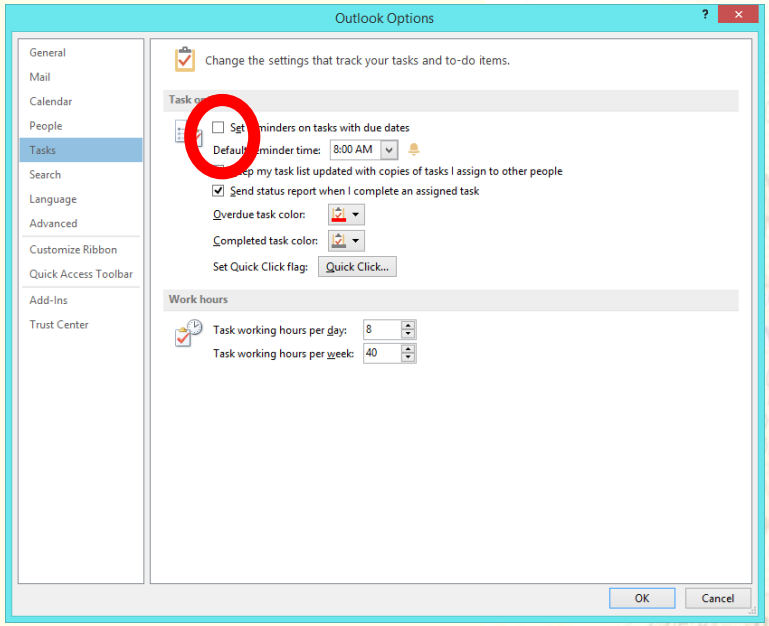
1. From the *File* menu, click *Options*.
2. Click *Advanced.*
3. Where you see *Startup in this folder*, click *Browse* and navigate to *Calendar*. After clicking *Calendar*, click OK each time it is presented.
4. You may also want to check the box to have Outlook empty your deleted mail when you exit.



Turning Off task Reminders

While you are accessing the Tools menu, let's do one more thing. We will turn off the automatic reminder feature on tasks.

1. From the *File* menu, click *Options*.
2. In the left-hand panel, click Tasks.
3. Click *Task Options.*
4. Uncheck *set reminders on tasks with due dates*, and click OK.

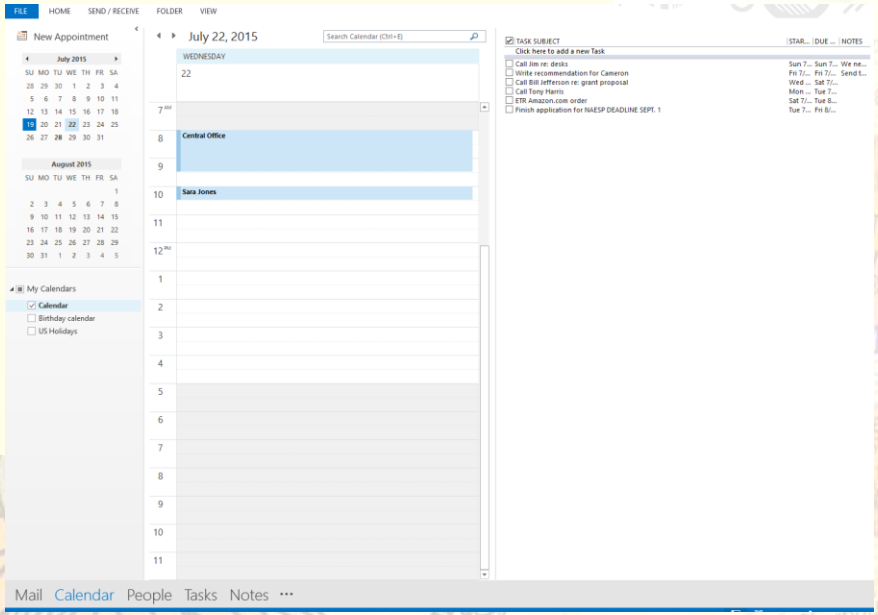


Why uncheck this box? If checked, a box would appear and an audible chime would sound for *every task due that day*. You always have the opportunity to set a reminder on an individual task if needed. That's all you need.

Showing the To-Do Bar (or TaskPad)

By default, when we click the *Calendar* button, we see only the *Calendar*. You will want the *To-Do Bar* as well.

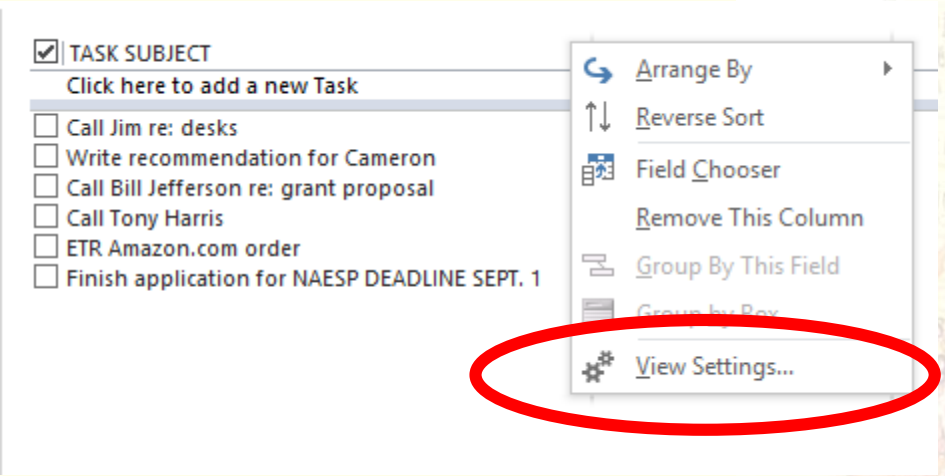
From the *View* menu, select *To-Do Bar* and place checkmarks beside *Tasks*.



Microsoft product screen shot(s) reprinted with permission from Microsoft Corporation.

Customize View Settings

While you now see your Task List, it lacks the fields which will make navigation easy. We will add these fields, and add other enhancements which will make the list appear the way we want.

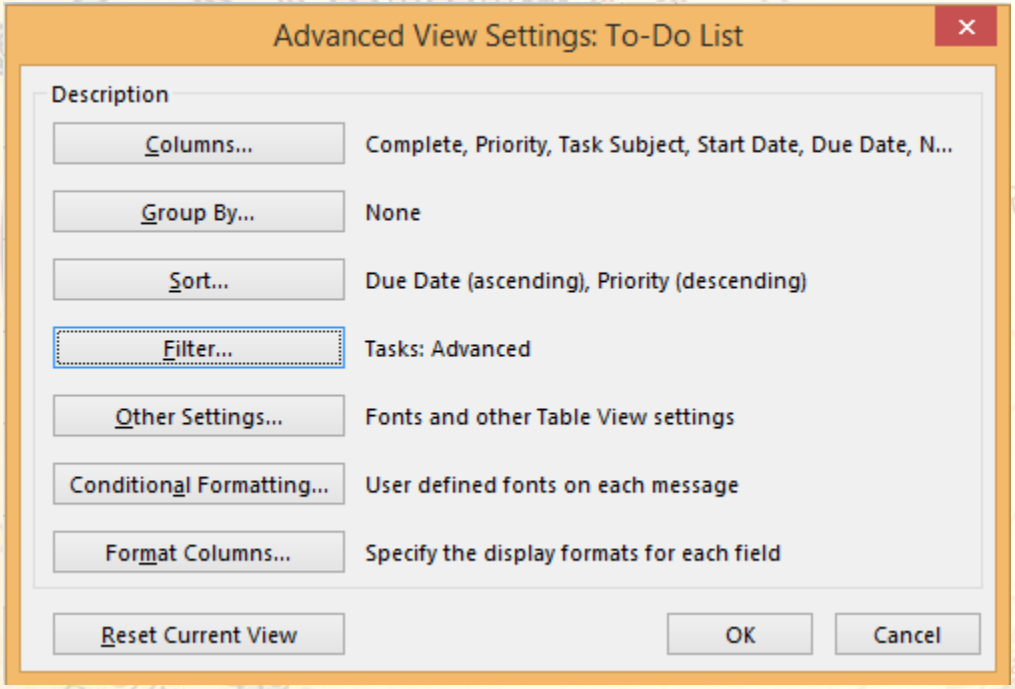


Right-click on the header just above the line where you would enter a new task. If you are clicking in the correct spot, you will see the menu displayed in this diagram.

From the menu, select *View Settings.*

Adding Fields

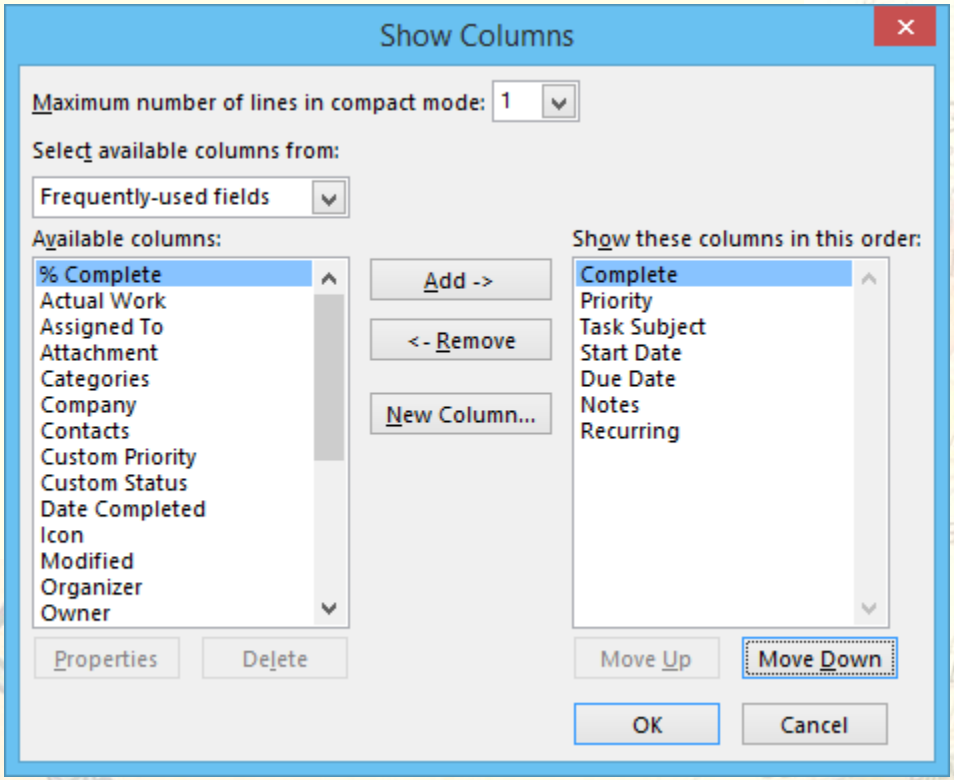
Let's start by selecting *Columns*. After we establish those fields, we will return to this same screen to *Sort*, *Filter* and use *Conditional Formatting*.



Choosing Your Columns

From the drop-down menu, select *Frequently-used fields*. Select the fields from the left and click *Add* to have them populate the box on the right.

Click the columns in the order you see listed. If needed, you can rearrange the list by clicking *Move Up* or *Move Down* or by dragging the items up or down.

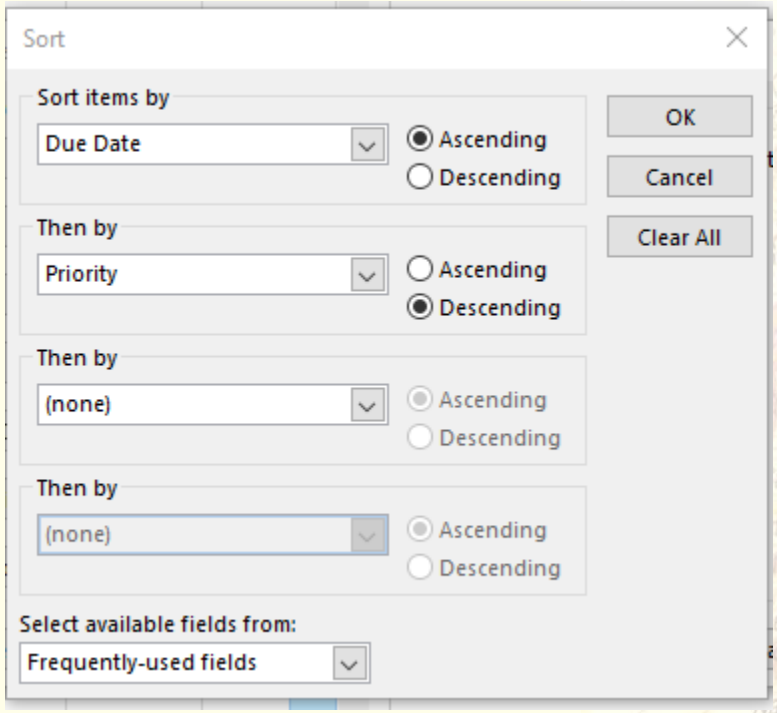


Sort the Task List by Due Date & Priority

Next, click on “Sort.”
Sort by “Due Date.” Tasks that are overdue will appear at the top.

Apply a secondary sort by “Priority.” The way I use to Priority is to indicate during what part of the day I want to accomplish each task.

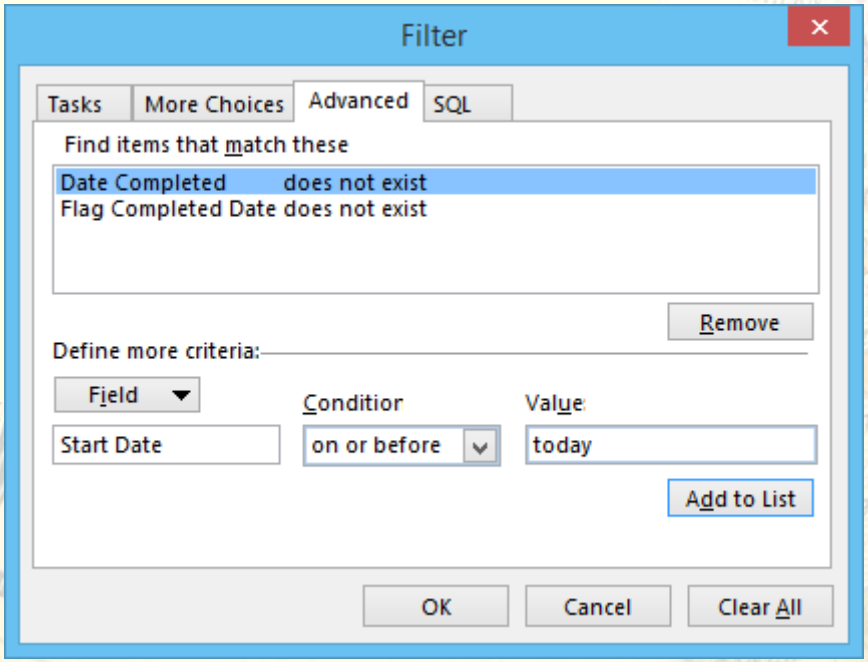
I like to think of “High,” “Medium,” and “Low” priority as representing morning, afternoon, and evening, respectively.



Filtering Tasks Which Start in the Future

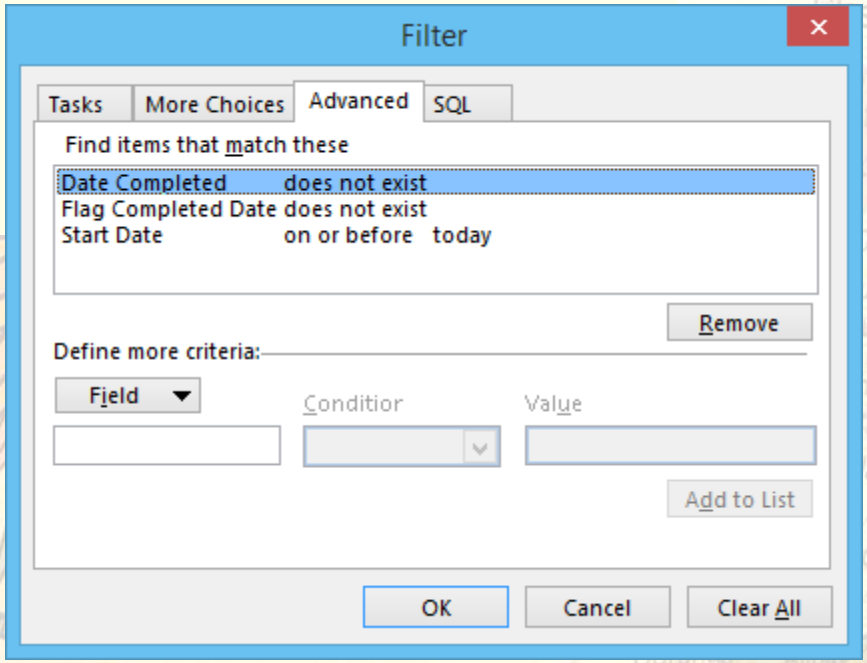
If the start date of a task is in the future, you do not want it to appear on your Task List until that day. We will add a filter which removes from view any task whose start date has not yet arrived.

Return to the *View Settings* screen. This time, choose *Filter*. Click the *Advanced* tab. From the *Field* drop-down, choose *Frequently-used fields*. This time, choose *Start Date*. The condition will be *on or before*. For value, key the word *today*. Click *Add to List* and *OK* your selections.



Other Filters

By default, you should have seen two rules already: 1) *Date completed does not exist* and 2) *Flag completed date does not exist*. Those rules are fine to leave as is. If you do not have the first rule, you will want to add it. That one causes tasks you have completed to disappear from the list. Otherwise. You would soon have a screen full of tasks with checkmarks beside them.

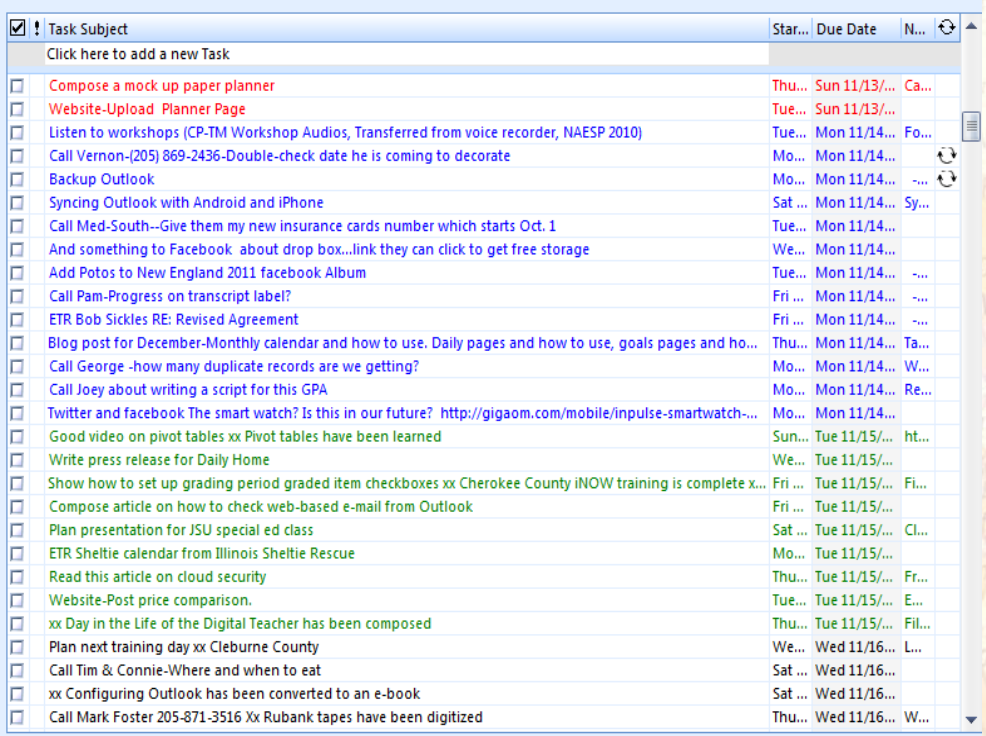


Adding Color to the Task List

By default, when a task is overdue, it turns red. Everything else is black.

On my list, *overdue* tasks are red, tasks due *today* are blue, tasks due *tomorrow* are green, and everything else is black.

We will return to the *View Settings* screen. This time, choose *Conditional Formatting*.



Task Subject	Star...	Due Date	N...
Click here to add a new Task			
Compose a mock up paper planner	Thu...	Sun 11/13/...	Ca...
Website-Upload Planner Page	Tue...	Sun 11/13/...	
Listen to workshops (CP-TM Workshop Audios, Transferred from voice recorder, NAESP 2010)	Tue...	Mon 11/14...	Fo...
Call Vernon-(205) 869-2436-Double-check date he is coming to decorate	Mo...	Mon 11/14...	
Backup Outlook	Mo...	Mon 11/14...	-...
Syncing Outlook with Android and iPhone	Sat ...	Mon 11/14...	Sy...
Call Med-South--Give them my new insurance cards number which starts Oct. 1	Tue...	Mon 11/14...	
And something to Facebook about drop box...link they can click to get free storage	We...	Mon 11/14...	
Add Potos to New England 2011 facebook Album	Tue...	Mon 11/14...	-...
Call Pam-Progress on transcript label?	Fri ...	Mon 11/14...	-...
ETR Bob Sickles RE: Revised Agreement	Fri ...	Mon 11/14...	-...
Blog post for December-Monthly calendar and how to use. Daily pages and how to use, goals pages and ho...	Thu...	Mon 11/14...	Ta...
Call George -how many duplicate records are we getting?	Mo...	Mon 11/14...	W...
Call Joey about writing a script for this GPA	Mo...	Mon 11/14...	Re...
Twitter and facebook The smart watch? Is this in our future? http://gigaom.com/mobile/inpulse-smartwatch-...	Mo...	Mon 11/14...	
Good video on pivot tables xx Pivot tables have been learned	Sun...	Tue 11/15/...	ht...
Write press release for Daily Home	We...	Tue 11/15/...	
Show how to set up grading period graded item checkboxes xx Cherokee County iNOW training is complete x...	Fri ...	Tue 11/15/...	Fi...
Compose article on how to check web-based e-mail from Outlook	Fri ...	Tue 11/15/...	
Plan presentation for JSU special ed class	Sat ...	Tue 11/15/...	Cl...
ETR Sheltie calendar from Illinois Sheltie Rescue	Mo...	Tue 11/15/...	
Read this article on cloud security	Thu...	Tue 11/15/...	Fr...
Website-Post price comparison.	Tue...	Tue 11/15/...	E...
xx Day in the Life of the Digital Teacher has been composed	Thu...	Tue 11/15/...	Fil...
Plan next training day xx Cleburne County	We...	Wed 11/16...	L...
Call Tim & Connie-Where and when to eat	Sat ...	Wed 11/16...	
xx Configuring Outlook has been converted to an e-book	Sat ...	Wed 11/16...	
Call Mark Foster 205-871-3516 Xx Rubank tapes have been digitized	Thu...	Wed 11/16...	W...

Conditional Formatting

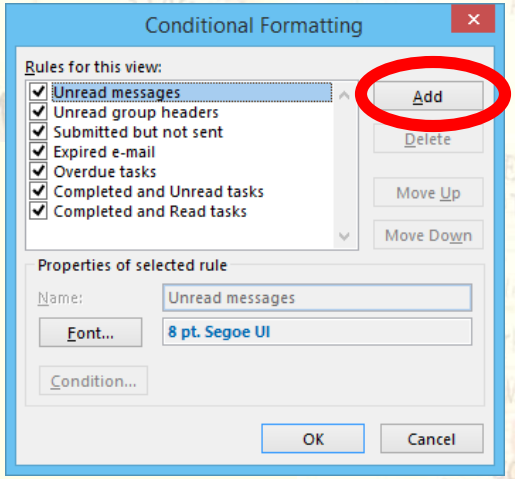
We will add two rules, one called *Due Today* and one called *Due Tomorrow*.

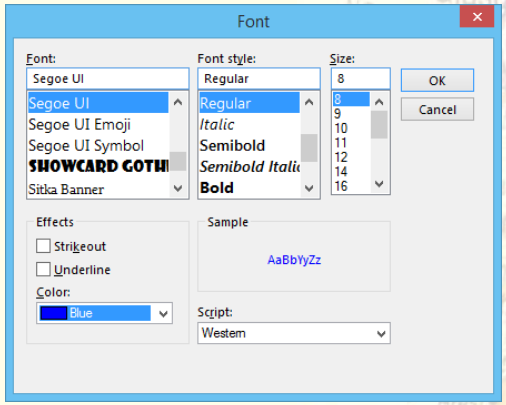
Click *Add*, key the name of the rule (*Due Today*), and click *Font*. Choose a color and *OK* your selection.

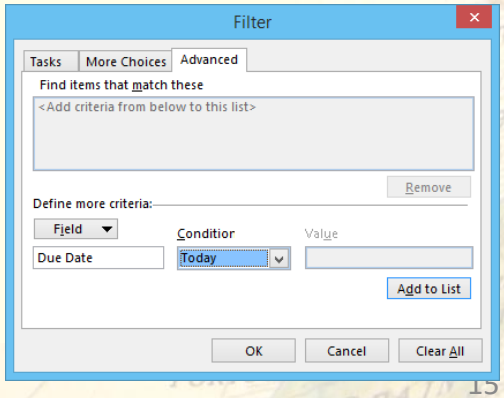
Click *Condition* and then the *Advanced* tab. Choose *Due Date* from the *Frequently-used fields* drop-down. For the condition, choose *today.* Click *Add to list* and then *OK*.

Repeat the process to add your second rule, the one you will call *Due Tomorrow*. I chose blue for Due Today and green for Due Tomorrow. You may select any colors you like.

When you return to the task list, you will see the results of your work.

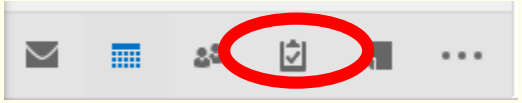




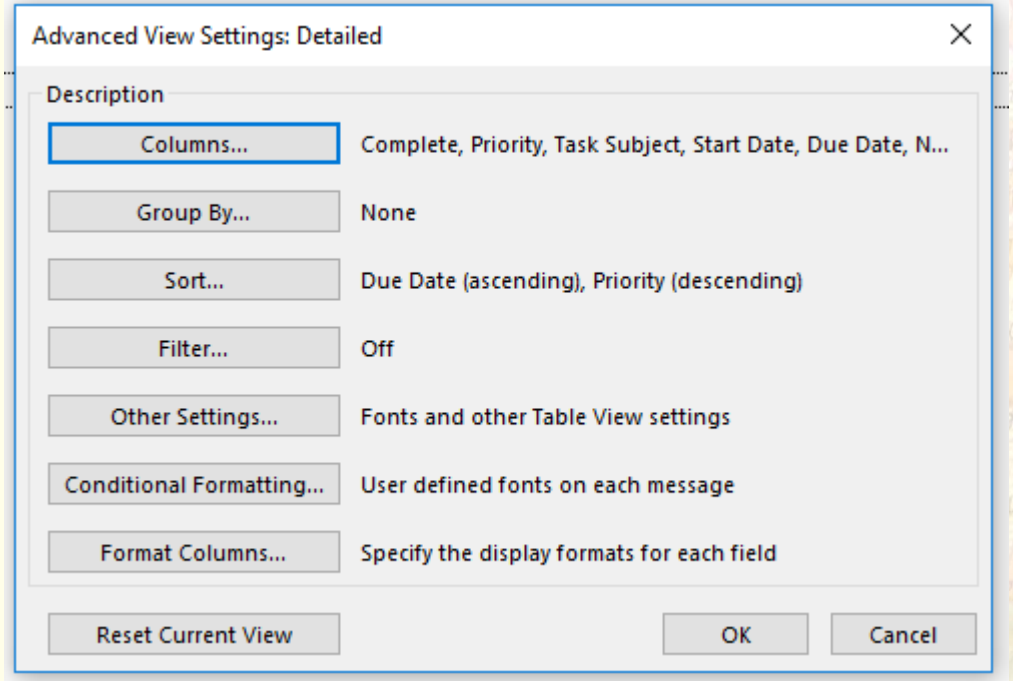


Task Module

You have completed setting up the “To-Do Bar.” Now, you will perform the same setup with the Task module.

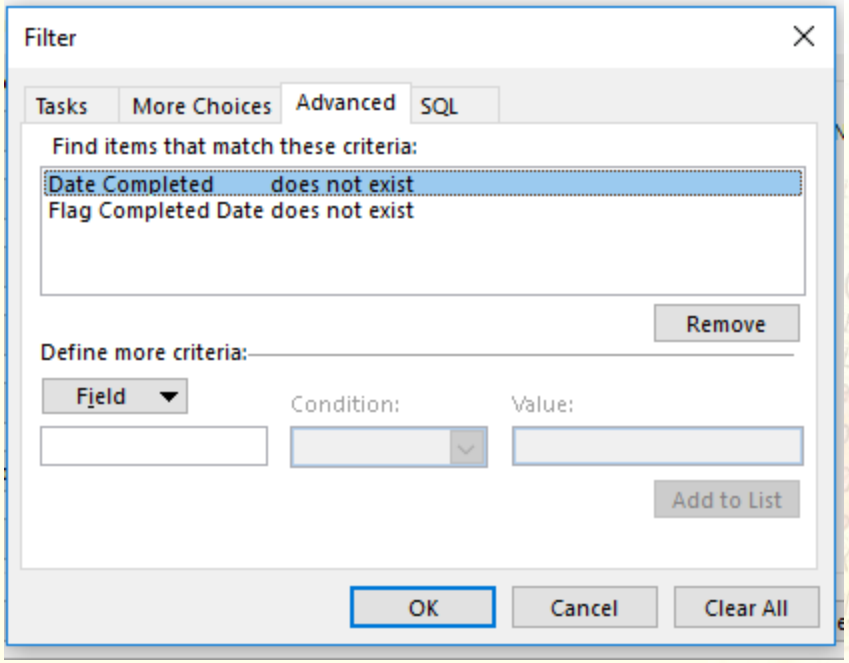


At the bottom left of the screen, click the icon representing Tasks.
Set up “Columns” and “Sort” exactly as you did with the To-Do Bar.



Task Module

Click the “Filter” button. Choose the selections you see to the right.



You will see a difference from what you filtered in the To-Do Bar. Here, we’re not going to filter out tasks with a future start date.

The result is a list of all tasks. This arrangement allows you to search for and edit tasks planned for far into the future.

Planning My Day and Week

To plan my day, I scan the list for the *Fab 5*, the five most important items for me to complete during the day. I want those items at the very top of the list, so I assign them due dates far enough in the past that they will sort to the very top of the list.

Next, I want to batch related items. Tasks I wish to tackle *in the morning* will be assigned a priority of *High*. *Middle* is for afternoon and *Low* for the evening.

Do you see tasks that are overdue and will not likely be completed today? Choose a different due date so they disappear. You can always see them by clicking the *Task* button.

Look for ways to batch related items:

1. Saturday is a good day for me to run errands, so errands get a Saturday due date. When Saturday arrives, all of the errands are batched together.
2. I routinely assign a due date of *Friday* to items I have delegated to someone else. On Friday, I see all of the items on which I need to follow up with someone else. I also assign a Friday date to tasks I simply want to accomplish sometime by the end of the week.

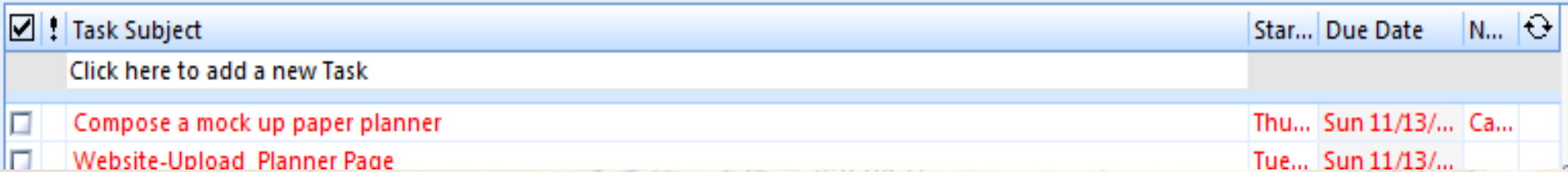
Planning My Day and Week

3. We all need that *Master List* of tasks of low-priority items. I assign a due date of the last day of the month. When I have extra time, I can scroll to the last day of the month in the Task module and select some of those items. This strategy also guarantees that when the last day of the month arrives, I will see those items and can assign a date to them for the following month.

Adjusting Column Width

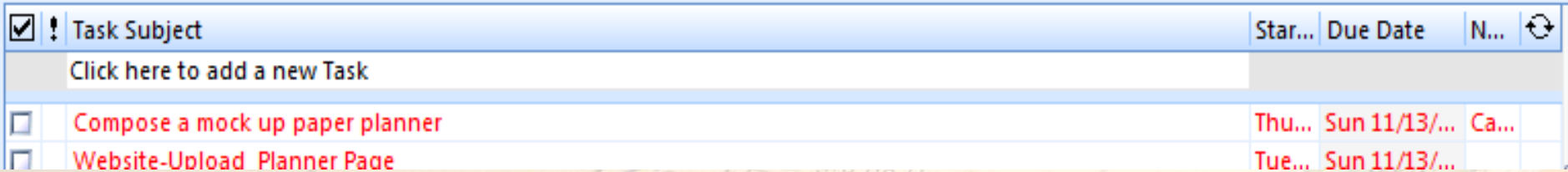
You can adjust the width of any column by clicking on the divider between columns and dragging right or left. Here is my strategy:

1. The left-most column is the *Checkbox,* so that I can mark the task complete.
2. The *Priority* column allows me to choose an exclamation point. I typically use it when a task has a start date in the future, yet when the start date arrives, the task must be done *that* day. The exclamation point calls my attention to that task.
3. I make the column for the *Task Subject* wide to provide plenty of room to clearly and completely word the task.
4. The next column is the *Start Date*. I rarely need to see what that date is. But, if I want to reschedule the start date, I can do so front right on the screen.
5. The *Due Date* is wide enough I can see the month and day. Being able to see this date clearly lets me know if I am bumping up against a deadline.



Adjusting Column Width

6. The *Notes* field is wide enough for me to see if there is anything in it. I often use the note area of a task to house any follow-up action. For example, if I am going to call Buford, and *then* I will call Penelope to tell her what Buford said, my task would read, "*Call Buford*." In the note area of that task, I would write, "*Call Penelope about Buford's response*." When I place the call to Buford, before I check if off as *done*, I want to see if there is follow-up information in the note area. Having that field display on the Task List allows me to see if there may be follow-up information.
7. The final column allows me to see if the tasks repeat. *I never change dates on repeating tasks*.



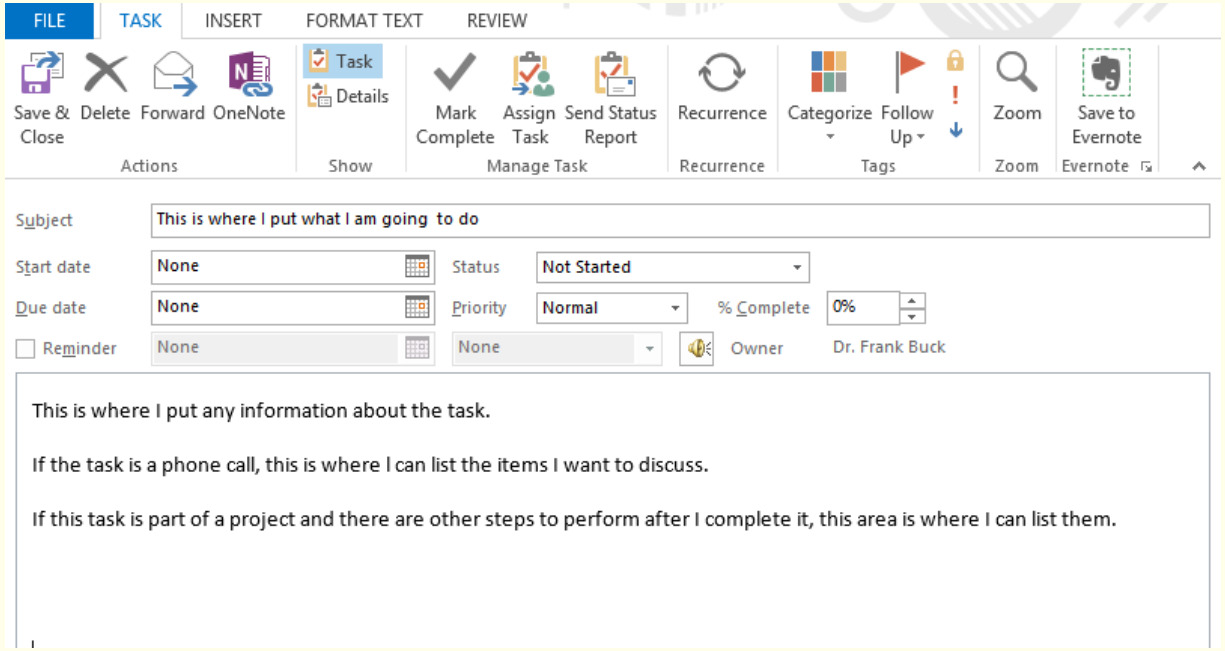
Changing Due Dates

There are several ways you can enter the date:

1. Click on the date and a calendar appears. Choose a different date.
2. After changing one date up using the pop-up calendar, you can use the *up* or *down* arrows to move about the list and simply enter new date.
   - *5/20/2018* is interpreted as *May 20, 2018*.
   - *5/20* is interpreted as the May 20th of the current year provided the entire month of May has not passed. If May has passed, the date assigned will have next year's calendar year. *20* is interpreted as the 20th day of the current month. This shortcut is one I use *daily*. As I arrow up and down the *Due Date* column to organize my list by changing due dates, I am simply entering numbers between *1* and *31*.

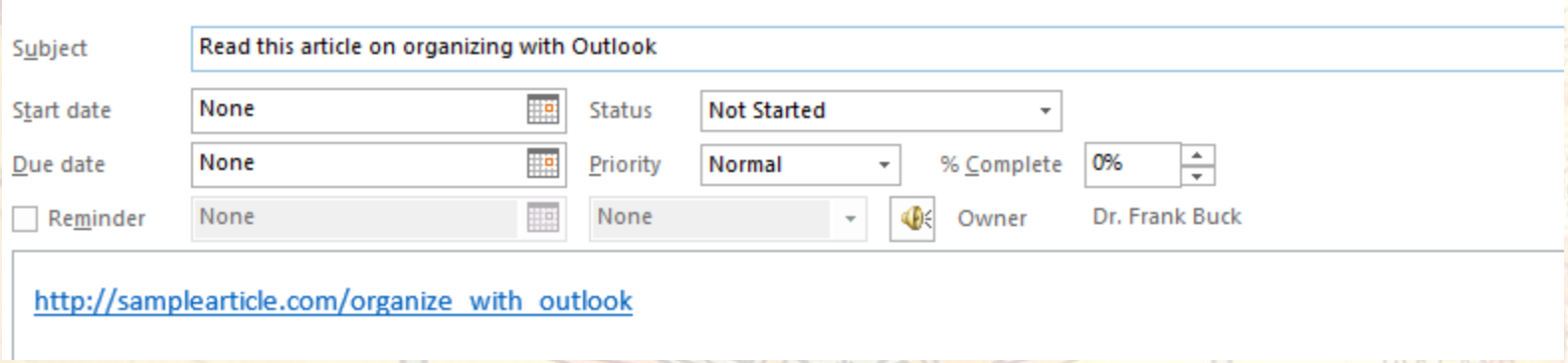
Adding Additional Information About a Task

One area where a digital Task List outshines a paper one is the ability to house additional information. If I double-click a task, I have a large area where I put information related to that task and where I put follow-up tasks to be handled afterthe one at hand has been completed.



Hyperlinks in the Note Section of a Task

If I key or paste a URL into the note area, the result is a *clickable link*.



Keyboard Shortcuts

Outlook has several handy keyboard shortcuts. The great thing about them is you can use them from any Outlook module. For example, you can be in e-mail when you think of an appointment you need to add. You do not have to click the Calendar button. You may use the shortcut of Ctrl+Shift+A to create an appointment while you are still in e-mail.

Keyboard Shortcut	**Action Performed by Shortcut**
Ctrl+Shift+A	Creates a new Appointment from anywhere in Outlook
Ctrl+Shift+C	Creates a new Contact from anywhere in Outlook
Ctrl+Shift+K	Creates a new Task from anywhere in Outlook
Ctrl+Shift+M	Creates a new email Message from anywhere in Outlook
Ctrl+Shift+N	Creates a new Note from anywhere in Outlook

Goals or Projects

Goals or projects are different in that they are completed only after a *series* of tasks are handled. In my system, I handle an entire goal or project with a *single Outlook task*.

I start by defining the goal. I phrase it as a statement with a *noun* up front and the statement is either *true* of *false*:

- Grant proposal has been submitted
- Secretary has been hired
- Car has been purchased

Each of these goals will be checked off as *done* only after a *number* of steps have been completed.

Next Step xx Goal

- Other next steps
- Other information

Next Steps, Goals, and Other Info

After defining the goal, I enter it into the subject line of the task. I precede the goal with *"xx"* and a space. My charge now is to brainstorm the steps needed to complete this goal. Sometimes I can list *every* step. Other times, I can list only one. The other steps often become evident as the goal evolves. Results of *one* step often shape what other *next steps* will be.

In order for the goal to move forward, I must define at least *one next step*. I place it on the subject line before the "*xx*."

What if I know *other* next steps? I list those in the note area. I also use the note area for other information I happen to know about the task.

When I complete the next step, I ***do not*** check off the task as *done*. Instead, I highlight and delete that next step and replace it with *another* next step.

Next Step xx Goal

- Other next steps
- Other information

Examples of Goals, Next Steps, and Info

Here are the examples of goals you saw earlier accompanied by *next steps*:

- Call Jim re: budget figures xx Grant proposal has been submitted
- Search Internet for sample interview questions xx Secretary has been hired
- Consult Kelley Blue Book for value of present car xx Car has been purchased

The idea is that each next step must be clear and easy to accomplish.

In this example, the goal is to develop a system for delivering professional development online. The *next step* for moving this goal forward is to count how many licenses will be needed, a figure which will impact the overall cost. The note area houses important information, such as when the grant is due and other next steps to handle during the life of the goal.

How many licenses will we need? xx Online professional development is being delivered

- Due August 1
- Examine catalog and identify 3 top needs of teachers
- Compose post for school system blog

Setting Up the Task list

To this point, we have used to the To-Do Bar for our tasks so that we can see that calendar and tasks side by side. The only problem is that the to-do bar lacks a search feature. In a moment, you will see how you can click the *Tasks* button to conduct a search. First, let's set up the Tasks module so that it looks like our To-Do Bar.

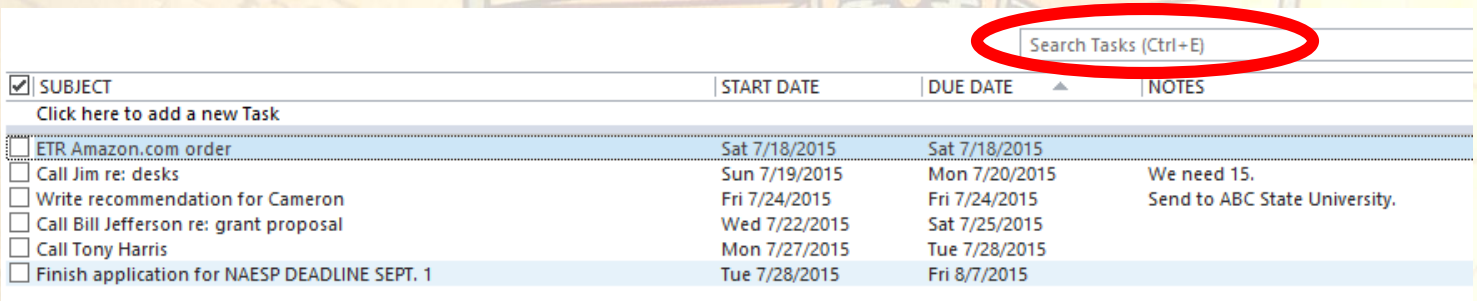
Click the *Tasks* button at the bottom of the screen. Click View and choose View Settings. You will go through exactly the sae routine that you did to organize the To-Do Bar.

1. Click *Columns* and select the same columns you chose earlier.
2. Choose *Filter*. Here, you are going to want to see every single tasks you have planned. The only tasks you want to exclude are those you have already completed. Click the *Advanced* tab. Click the Field drop-down and select Frequently-used fields. Select *Complete*, *equals*, and *no*. Click *Add to list* and *OK*.
3. If you wish to set up Conditional Formatting so that tasks due today are blue and task due tomorrow are green, you may do so. Follow the same procedure you did with the To-Do Bar.

Searching

What if I am looking for a certain task? Jim walks in the door unexpectedly. I know I have items on my Task List related to Jim, perhaps with varying due dates. Wouldn't it be great if I could quickly put my hands on *all* of the tasks related to “Jim”?

To search the Task List, I click the *Tasks* button at the bottom of the screen and choose *Tasks*. I enter my search term in the search window.



Searching

The ability to search gives a digital Task List a huge advantage over a paper one. You just saw one example of such a search—finding all mentions of the name of a person. Here are three more common examples.

Call—If I am consistent about putting the word "*call"* in any task that involves a phone call, entering "call" in the search window, returns a list of every phone call I need to make in order by due date.

ETR—Many years before going to a digital system, I established the habit of tracking what I was expecting to receive from others. Whether it was a book borrowed, merchandise ordered, or a phone message left, the abbreviation "*ETR*" served then and now as a reminder of what I am *expecting to receive*. In my digital system, entering "*ETR*" in the search window returns a list of every task where the ball is in someone else's court.

xx—Because I use "xx" to separate the *next step* from the *goal* to which it relates, entering "xx" in the search window return a list of *every goal or project* together with its next step and is sorted by due date.

Email—"In" to "Empty"

Because Outlook is an integrated program, each of the modules "talks" to one another. There is no better example than email.

We empty our *metal* mailboxes daily and make decisions about each item. We would *never* consider reading our mail and putting it back in the mailbox. Each day's delivery would be piled on that of the day before.

Yet, that is *exactly* how most of the world today handles the email Inbox. The emails contain important information about where we need to be, what we need to do, some valuable reference information, and email which simply needs to be saved for documentation purposes.

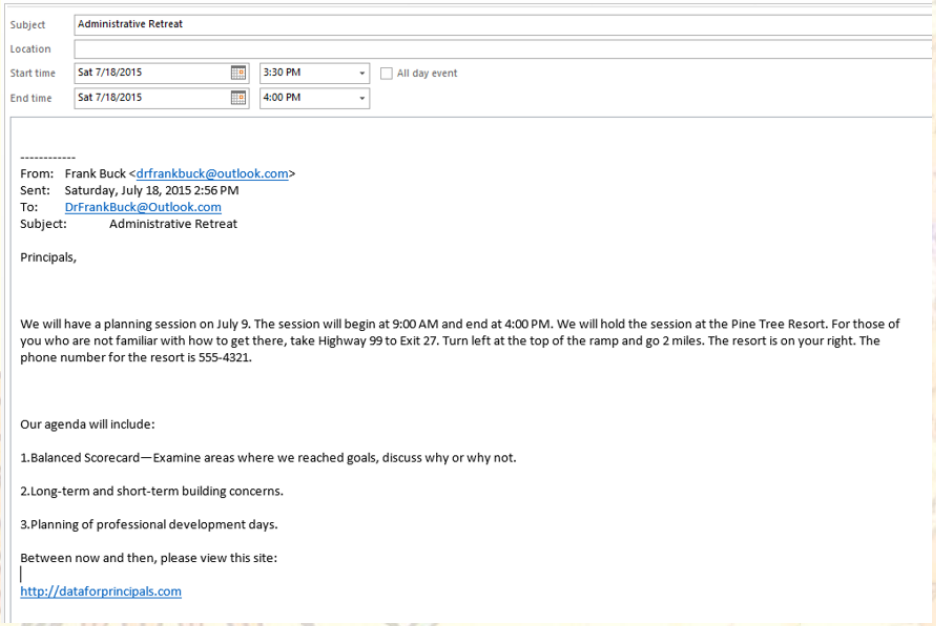
It all stays in the Inbox because people lack strategies for doing any differently. We can change that!

Drag and Drop Appointments

Imagine an email which announces a retreat. The email contains information on date and times, location, driving directions, and agenda. It even includes a piece of homework—to visit and study data from a particular website.

Because the information is important and will be needed later, it sits in the Inbox.

But, there is a better way!



Subject: Administrative Retreat
Location:
Start time: Sat 7/18/2015 3:30 PM All day event
End time: Sat 7/18/2015 4:00 PM

From: Frank Buck <drfrankbuck@outlook.com>
Sent: Saturday, July 18, 2015 2:56 PM
To: DrFrankBuck@Outlook.com
Subject: Administrative Retreat

Principals,

We will have a planning session on July 9. The session will begin at 9:00 AM and end at 4:00 PM. We will hold the session at the Pine Tree Resort. For those of you who are not familiar with how to get there, take Highway 99 to Exit 27. Turn left at the top of the ramp and go 2 miles. The resort is on your right. The phone number for the resort is 555-4321.

Our agenda will include:

1.Balanced Scorecard—Examine areas where we reached goals, discuss why or why not.

2.Long-term and short-term building concerns.

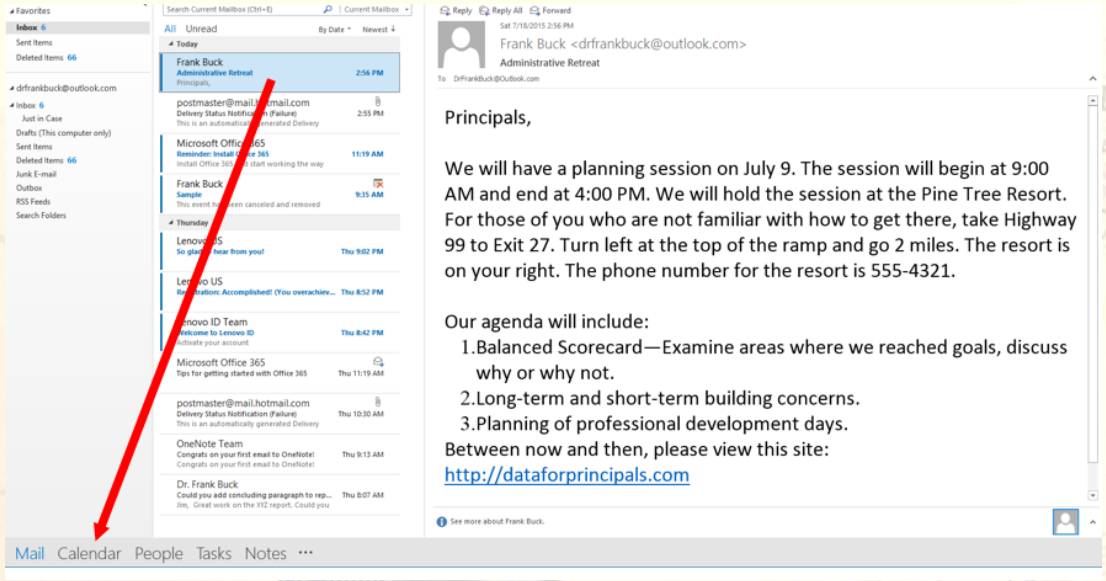
3.Planning of professional development days.

Between now and then, please view this site:

http://dataforprincipals.com

Drag and Drop Appointments

Click on the email and drag it to the *Calendar* button. When you release the mouse button, you will find Outlook has created a new *appointment*. The subject of the email becomes the subject of the appointment, but you can change it. The entire body of the email is contained in the note area of the appointment. Add a date and time and save the appointment. Now, all of this information is on your Calendar.

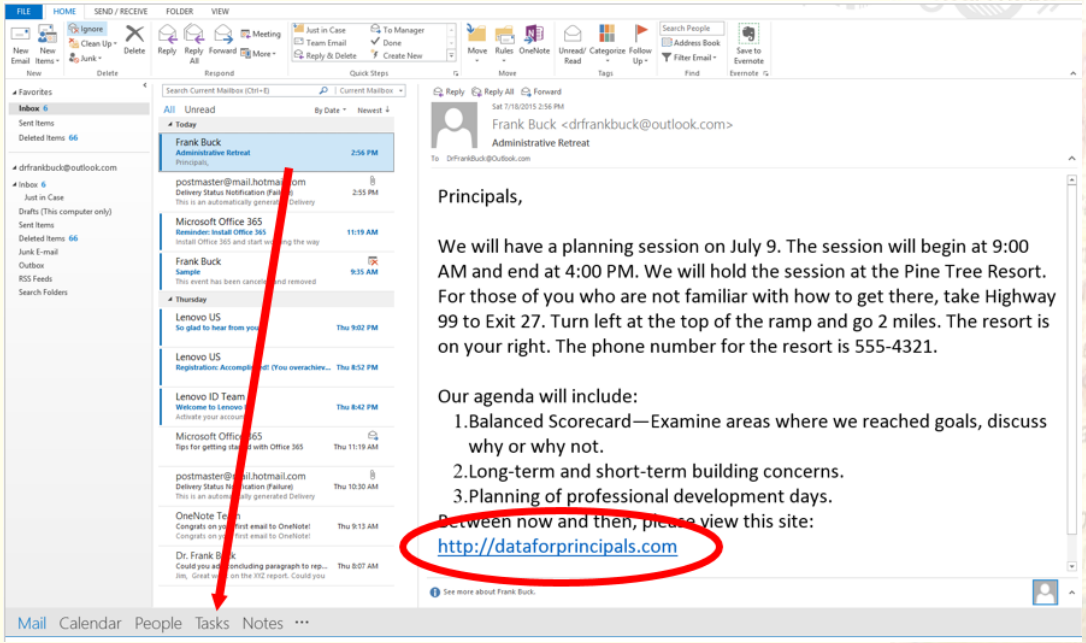


Drag and Drop Tasks

The same email contains instructions to visit a particular website before the retreat. That's a *task*. Click on the email and drag it to the *Task* button. Outlook creates what you see here—a new task. The subject of the email becomes the subject of the task, but you can edit it. The entire body of the email appears in the note area of the task.

Edit as needed. Set a start date, due date and save. This item is now on your Task List.

With the calendar information on your Calendar and the to-dos on your Task List, *you may now* ***delete*** *the email!*



Drag and Drop "ETR" Items

When we place an order, we generally receive a confirmation email. It's great information to have three weeks from now when the merchandise we expect to receive has not arrived and we want to check on it. It's terrible information to sit in the Inbox for the next three weeks.

Drag the email to the Task button. Decide when you want to see the information. Set a start date, due date, and save.

Now delete the email!

Reference Information

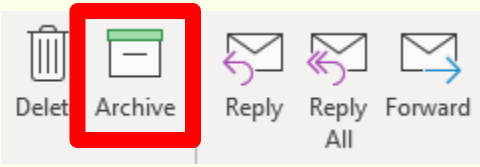
What if the email contains good *reference* information? Drag it to *Notes* in Outlook. Or, you can go to "*File*" and "*Save as*" and save it where you would save similar items on your computer's hard drive.

or

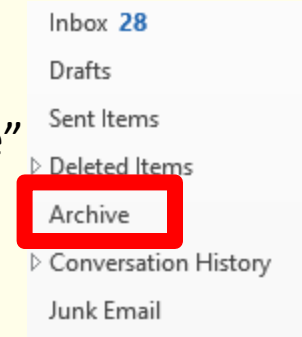
File…Save As

Documentation

What about the remaining emails? There are going to be emails which require no further action, but you need to save them for documentation purposes. ***Archive*** those emails. On the Home tab, you see this row of button:



Click on an email in the list and click the “Archive” button. The message is no longer in your inbox. If you would like to select more than one email at a time, hold the <Ctrl> key (on Windows) and click the emails one-at-a time. If you click an email, hold <Shift> and click another email, Outlook highlight all emails in between.



To search for an email you archives, look for “Archive” in the menu on the left of the screen. Use the “Search” menu at the top to refine your search.

"In" Becomes "Empty"

You have worked through your email…

- Calendar information is now on your *Calendar*.
- Tasks to perform are now in your *Task List*.
- Tasks others should be handled have been forwarded to them, and you have an *ETR* in your Task List so you may follow up as needed.
- Reference information is in *Notes, OneNote,* or saved in your folder system within your computer.
- Information needed to save for documentation is in "Archive."

Now, your Inbox is ***empty***!

This short e-book has as its focus a single aspect of Outlook—the *Task List*. It is my hope that you have a better understand of how to use this powerful feature of Outlook.

Today's world offers many alternatives. If you are using another software program to manage your tasks, the methodology offered here will likely work with your software. Being able to search, being able to assign due dates and sort the list by due date, being able to establish repeating tasks, and having a note area attached to each task—all of these are common features of task management software. Feel free to take the concepts you have learned here and apply them to the software of your choice.

Comments from past workshops attendees

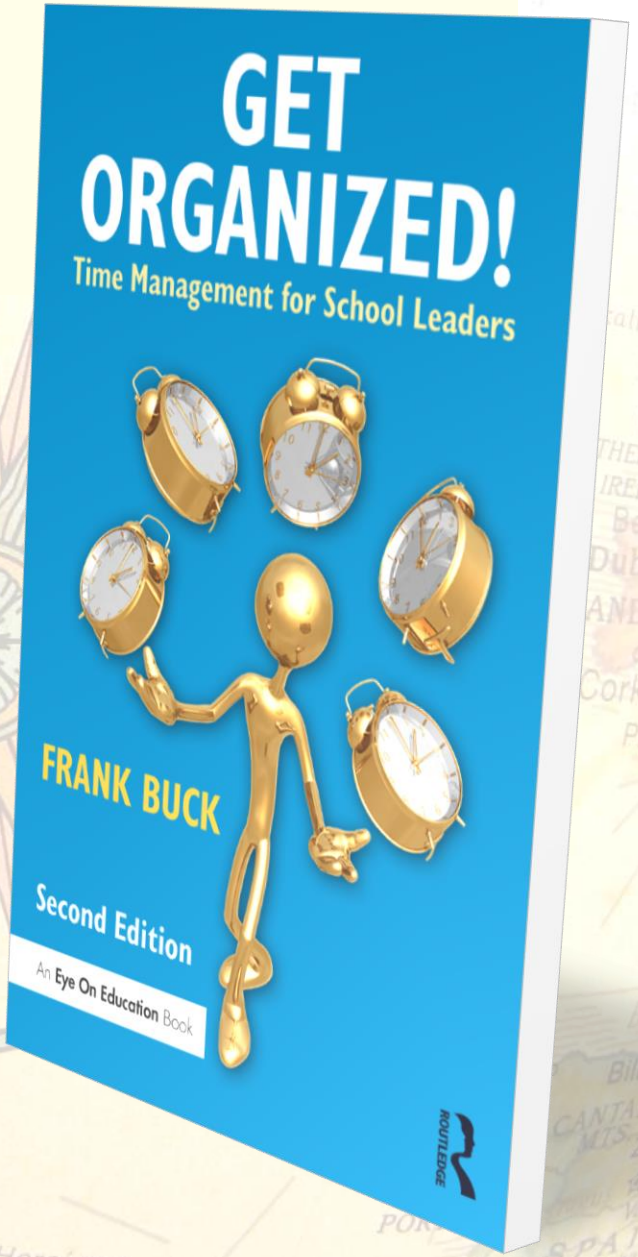
- *"This morning when I returned to the office I did my first ever drag and drop to my calendar on Outlook - wahoo! The tickler file will come next week!"*
- *"One of the most informative sessions I have been to in 5 years."*
- *"I saw your presentation at the ASCD conference in New Orleans and was blown away. Please send me your monthly email essays."*
- *"Practical down to earth user-friendly content. Excellent!"*
- *"One of my professional goals is to be more organized and to manage time more effectively. This hit the target."*
- *"Thank you. These are tools I can and will use! WHEW!"*
- *"Practical, down-to-earth user-friendly content. Excellent!"*
- *"Where have you been all my life? This is a great idea! Thank you so very much."*
- *"FANTASTIC! One of the best I've been to! I could have stayed longer."*
- *"Awesome ideas to get my life on track. Thank you so much!"*
- *"You changed my life!"*

Comments from past workshops attendees

- *“Great workshop. Fabulously well informed and entertaining presenter who shared his knowledge in a readily understandable format. Helpful handout. Thank you well worth the trip from Ottawa.”*
- *“I really loved the presentation!! Dr. Buck very thorough and entertaining. Great, practical ideas and the Faculty Club was a great setting! Well done!!”*
- *“I loved this seminar!! Very, very well presented. Clear, logical, Dr. Buck was enthusiastic and witty. Very practical information that I will put to use immediately.”*
- *“Great presenter. Was very informative, practical info to apply right away.“*
- *“As a new administrator, I found this workshop to be extremely helpful. I got affirmation on some of the things I was already doing and many great new ideas! Thank you. Would definitely recommend to others. Frank Buck provided many ideas that will make my job as an administrator 10 times easier.“*
- *“This might very well be some of the most useful, timely and necessary professional learning I've done in years. Thank you!”*
- *“Excellent presentation. Dr. Frank Buck is friendly, interesting, and knowledgeable. Well done! This seminar was amazing”*

Additional resources:
Get Organized! Time Management for School Leaders (2nd Edition)

You can order from Amazon.com



Biography

Frank Buck is a veteran school administrator, public speaker, productivity coach, and writer. He helps people achieve their goals through organization and time management.

Dr. Buck is the author of *Get Organized!: Time Management for School Leaders (Second Edition)*. He has spoken to audiences throughout the United States and internationally to acquaint them with how to work with total control and peace of mind. Dr. Buck was named to "Global Gurus Top 30" in the area of time management for 2017 and 2018. To learn more, visit Dr. Buck at his website, FrankBuck.org.

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Now that you have finished this e-book, let's stay in touch.

Join my email list for regular tips on organization and time management.

Best wishes in your efforts to "*Get Organized*!"

—Frank Buck

"Organization Made Easy"