How to Set Up TASKS in Microsoft Outlook 2007

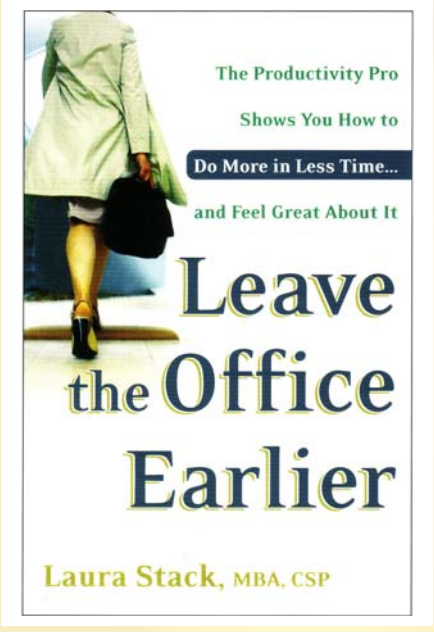
Presented by

Laura Stack, MBA, CSP

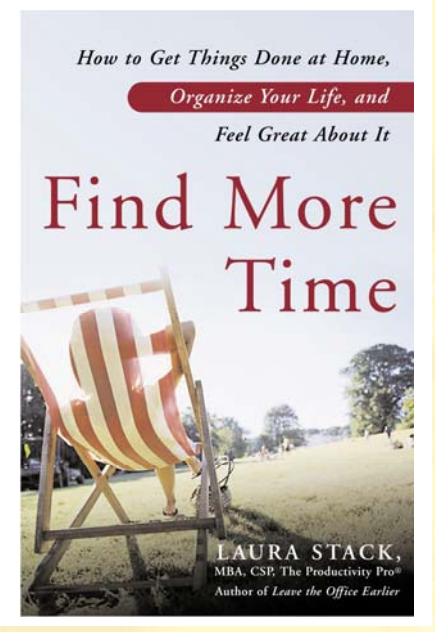
The PROductivity PRO®
Maximum Results. Minimum Time™

9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130
Phone: 303-471-7401, Fax: 303-471-7402
Email: Laura@TheProductivityPro.com, Website: www.TheProductivityPro.com

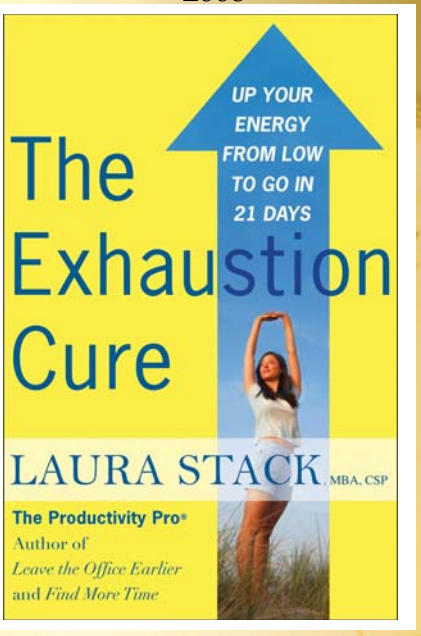
2004



2006



2008



About The Productivity Pro®, Inc.

Laura Stack, MBA, CSP, is a personal productivity expert, author, and professional speaker who helps busy workers Leave the Office Earlier® with Maximum Results in Minimum Time®. She is the president of The Productivity Pro®, Inc., a time management training firm specializing in productivity improvement in high-stress organizations. Since 1992, Laura has presented 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 time management and productivity topics. She is a high-energy, high-content speaker, who educates, entertains, and motivates professionals to improve workplace productivity.

Laura is the author or co-author of five books, including *The Exhaustion Cure* (Broadway Books, 2008), *Find More Time* (Broadway Books, 2006), two of the popular *Chicken Soup for the Soul* books, and the bestselling *Leave the Office Earlier* (Broadway Books, 2004), which was hailed as "the best of the bunch" by the New York Times and listed on the June 2004 Book Sense Business & Economics Bestseller list. *Leave the Office Earlier* has been published in seven countries and in five foreign languages, including Japanese, Korean, Chinese, Taiwanese, and Italian. Laura's popular monthly electronic newsletter has subscribers in 38 countries. She is a Certified Specialist in Microsoft® Office Outlook.

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, NBC TV, WB News, the New York Times, USA Today, The Wall Street Journal, the WashingtonPost.com, the Chicago Tribune, O Magazine, SELF, Me, Working Mother magazine, Entrepreneur magazine, Readers Digest, Woman's Day, and Parents magazine. Laura has been a spokesperson for Microsoft, 3M, and Day-Timers, and she is the creator of The Productivity Pro® line of Day-Timer® planning system. Her client list includes top Fortune 500 companies, including Microsoft, IBM, GM, Coors, the Denver Broncos, Lockheed Martin, Lucent Technologies, Wells Fargo, Mobil, Time Warner, and VISA, plus a multitude of associations and governmental agencies.

Laura holds an MBA in Organizational Management (University of Colorado, 1991), integrating the importance of productivity in business with employee retention and satisfaction. She is on the Board of Directors of the National Speakers Association (NSA) and is the recipient of the Certified Speaking Professional (CSP) designation, NSA's highest earned designation.

Laura lives with her husband and three children in Denver, Colorado.

© Copyright 2001-2009, Laura Stack, MBA, CSP. All rights reserved.
The Productivity Pro®, Inc., 9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130
Phone: (303) 471-7401, Email: Laura@TheProductivityPro.com, Web: www.TheProductivityPro.com
Subscribe to free e-zine: http://www.theproductivitypro.com/r_subscribe.htm
Laura's blog: http://www.TheProductivityPro.com/blog

Using Tasks

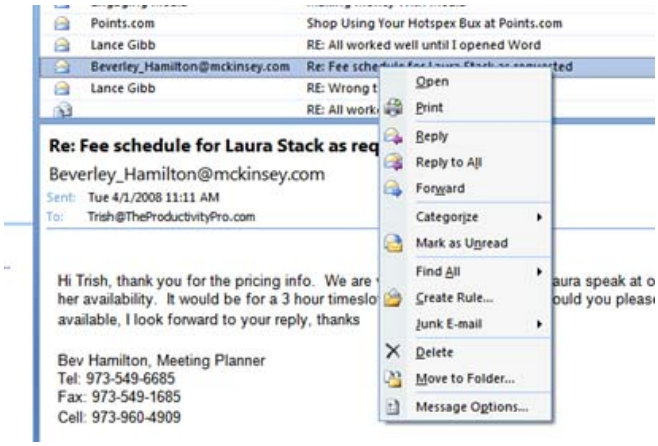
A task is a personal or work-related action item that you want to track until it's completed. A task can occur once or repeatedly. A recurring task can repeat at regular intervals or repeat based on the date you mark the task complete. For example, you might want to send a status report to your manager on the last Friday of every month, or get a haircut when one month has passed since your last haircut.

A. 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 show up in your to-do list as a "No Date" 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.

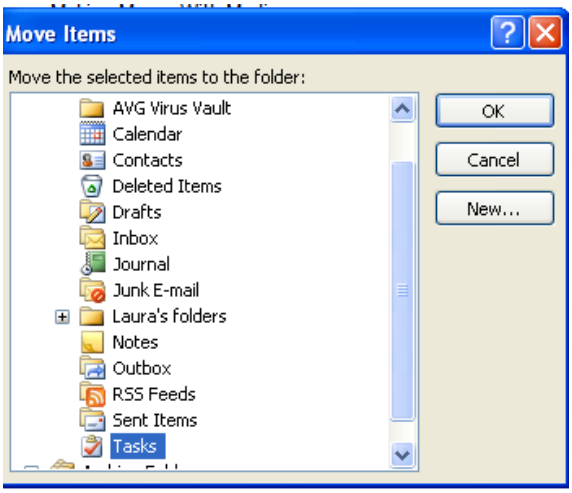
B. Capture an Email as a Task on the Task Pad.

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).

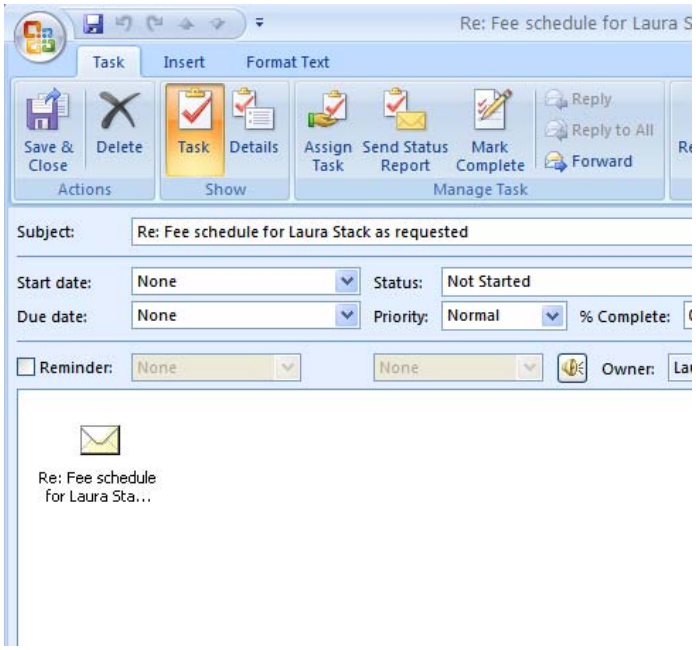


3. Select Tasks from the list.
4. Click OK.

© Copyright 2001-2009, Laura Stack, MBA, CSP. All rights reserved.
The Productivity Pro®, Inc., 9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130
Phone: (303) 471-7401, Email: Laura@TheProductivityPro.com, Web: www.TheProductivityPro.com
Subscribe to free e-zine: http://www.theproductivitypro.com/r_subscribe.htm
Laura's blog: http://www.TheProductivityPro.com/blog



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.

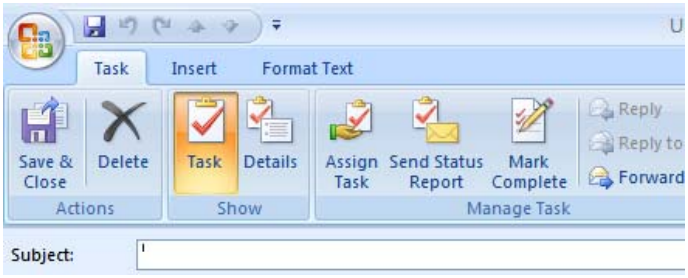


8. The task will now appear in your To-Bar bar under the "Today" flag (or later depending on your start date). Double click on the task and double click the email icon. Your original email will open, and you can reply right from the task.

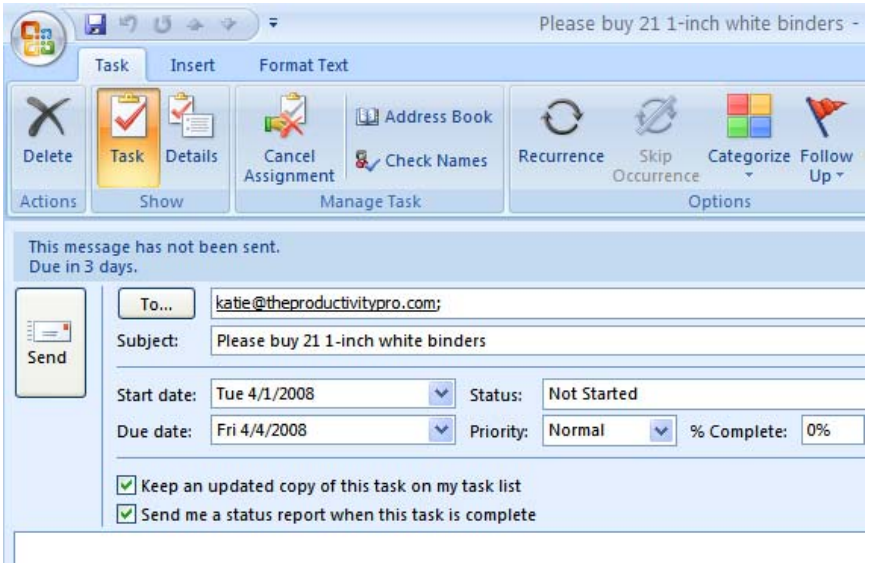
© Copyright 2001-2009, Laura Stack, MBA, CSP. All rights reserved.

C. 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.



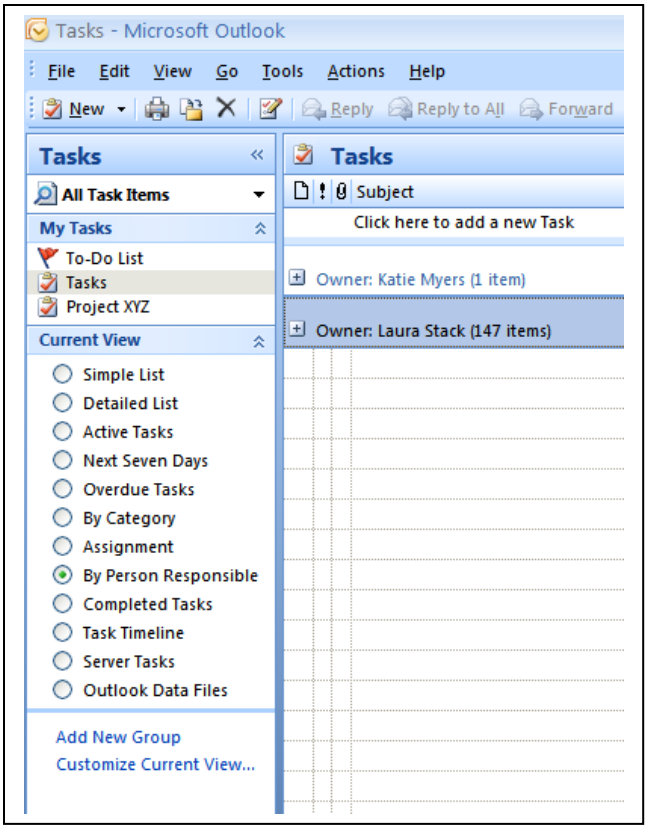
10. Click Send.

Note: The recipient can either Accept or Decline your task request, just like a meeting request. If accepted, it goes right to Tasks.

© Copyright 2001-2009, Laura Stack, MBA, CSP. All rights reserved.
The Productivity Pro®, Inc., 9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130
Phone: (303) 471-7401, Email: Laura@TheProductivityPro.com, Web: www.TheProductivityPro.com
Subscribe to free e-zine: http://www.theproductivitypro.com/r_subscribe.htm
Laura's blog: http://www.TheProductivityPro.com/blog

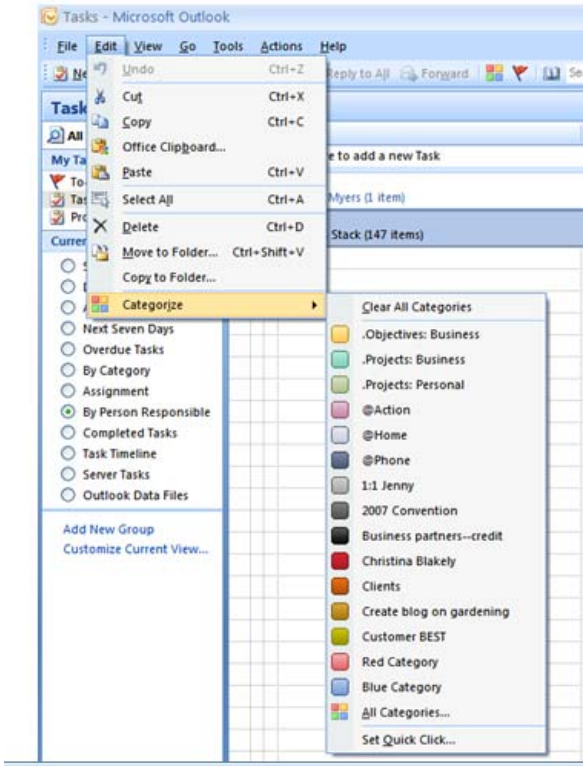
D. View Assigned Tasks by Person Responsible.

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



E. Create Your Master Categories List.

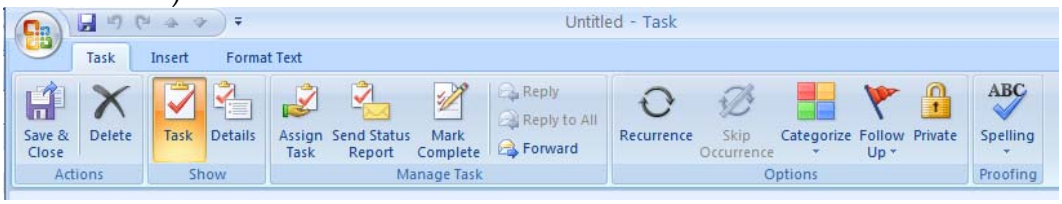
1. From any menu, select Edit, Categorize.
2. Select "All Categories" on the bottom to customize the colors, short-cut keys, and labels.
3. Or select "Quick click" to program the left-click.



© Copyright 2001-2009, Laura Stack, MBA, CSP. All rights reserved.
The Productivity Pro®, Inc., 9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130
Phone: (303) 471-7401, Email: Laura@TheProductivityPro.com, Web: www.TheProductivityPro.com
Subscribe to free e-zine: http://www.theproductivitypro.com/r_subscribe.htm
Laura's blog: http://www.TheProductivityPro.com/blog

F. Tag a Task with a Category.

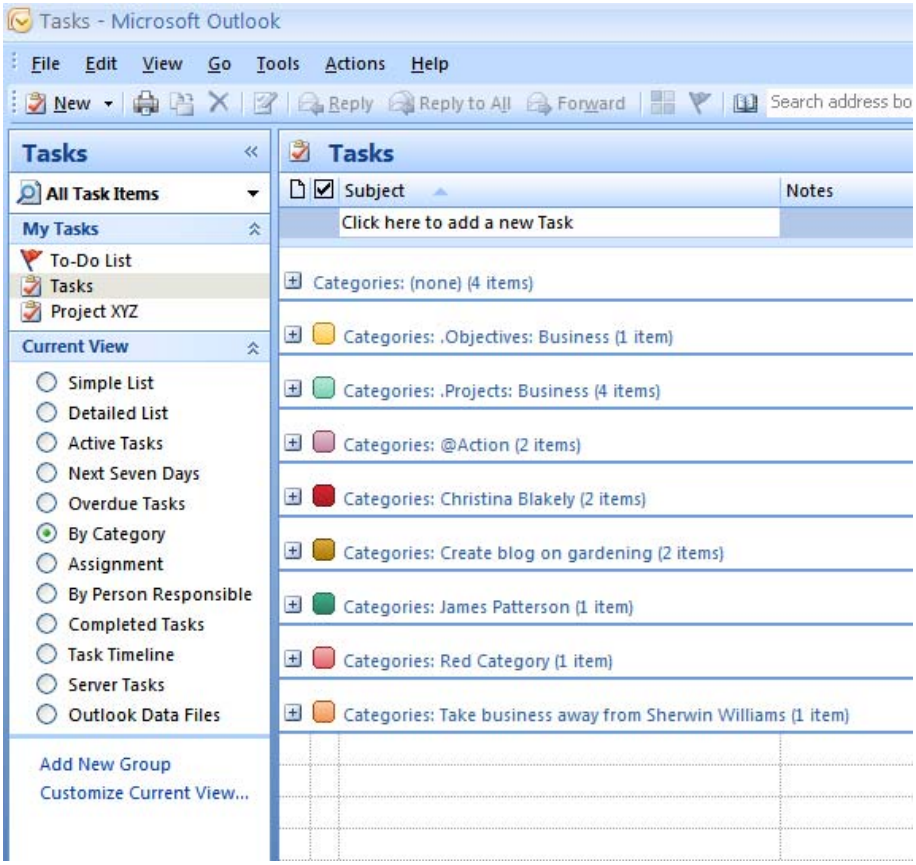
1. Create a new task.
2. Click the Categories button at the bottom left of the task.
3. Check the appropriate boxes to describe the task (plus the rest of the pertinent information).



4. Save and Close.

G. View Tasks for by Category/Project.

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



© Copyright 2001-2009, Laura Stack, MBA, CSP. All rights reserved.
The Productivity Pro®, Inc., 9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130
Phone: (303) 471-7401, Email: Laura@TheProductivityPro.com, Web: www.TheProductivityPro.com
Subscribe to free e-zine: http://www.theproductivitypro.com/r_subscribe.htm
Laura's blog: http://www.TheProductivityPro.com/blog

Educational Resources by Laura Stack

Virtual Outlook series via Webinar/Online training:
http://www.theproductivitypro.com/s_outlook-virtual-training.html

Productivity webinar series: http://www.theproductivitypro.com/s_virtual-webinar.htm

Hire Laura to speak at your next conference, meeting, or event:
http://www.theproductivitypro.com/s_seminars_and_workshops.htm

Join Laura's private LinkedIn network, The Productivity Pro® Alumni, to exchange ideas and insights: http://www.linkedin.com/e/vgh/1259217/

Follow me on Twitter: http://twitter.com/laurastack

Sign up for my free monthly newsletter, The Productivity Pro®:
http://www.theproductivitypro.com/r_subscribe.htm

Subscribe to my blog: http://www.theproductivitypro.com/blog/

Laura's website has over 100 free articles for download:
http://www.theproductivitypro.com/FeaturedArticles/article_map.php

FREE downloadable worksheets, checklists, and resources:
http://www.theproductivitypro.com/r_free_stuff.htm

Take the quizzes FREE from Laura's three books:
http://www.theproductivitypro.com/r_quizzes.htm

Get a FREE tip of the day via email:
http://www.theproductivitypro.com/r_subscribe_365Tips.htm

Receive a tip each week texted straight to your cell phone:
http://www.theproductivitypro.com/r-TipOfTheWeek.htm

Educational Resources for purchase (books, CDs, DVDs, self-study audio, video training, MP3s etc.) http://www.theproductivitypro.com/t_productivity_tools.htm

Buy the Productivity Pro® Day-Timer: www.daytimer.com/laurastack

Laura's YouTube channel: http://www.youtube.com/user/theproductivitypro

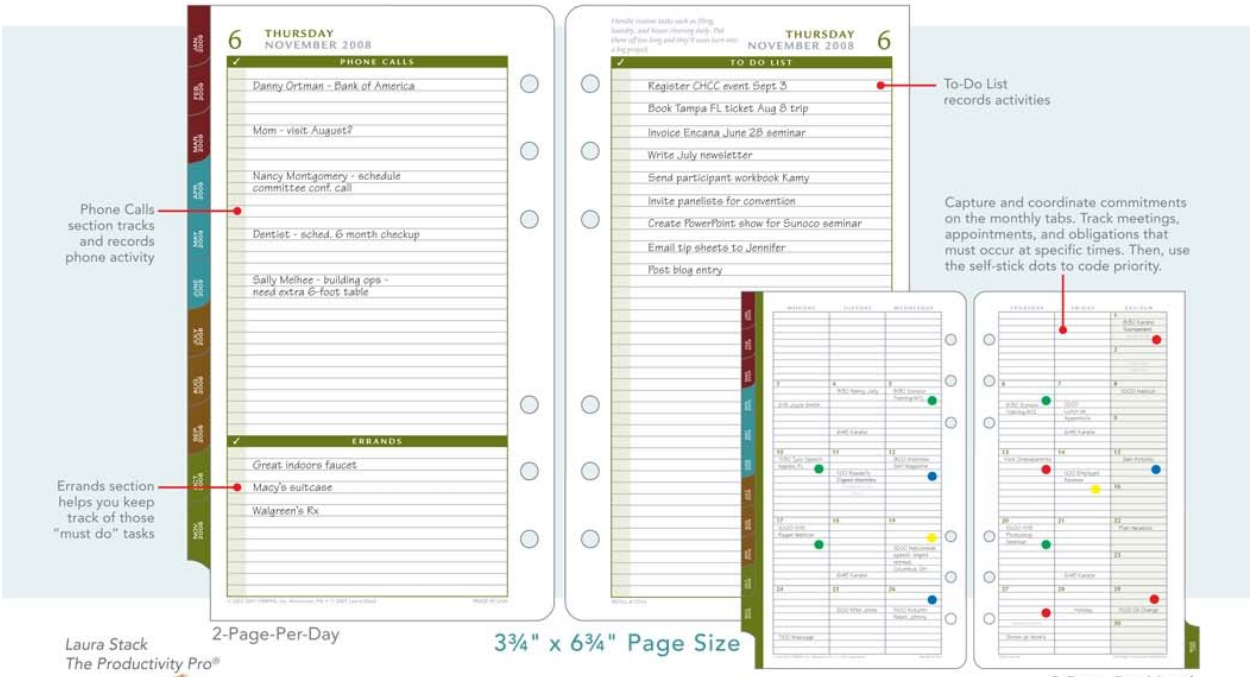
© Copyright 2001-2009, Laura Stack, MBA, CSP. All rights reserved.
The Productivity Pro®, Inc., 9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130
Phone: (303) 471-7401, Email: Laura@TheProductivityPro.com, Web: www.TheProductivityPro.com
Subscribe to free e-zine: http://www.theproductivitypro.com/r_subscribe.htm
Laura's blog: http://www.TheProductivityPro.com/blog

The Productivity Pro® Laura Stack and Day-Timers introduce…

The Productivity Pro Planner!

The efficiency of electronics integrated with the reliability of paper...

Hand-helds are great task managers, but they're not configured for extensive note-taking. Professional speaker, Laura Stack, has designed the first planner geared specifically to hand-held users. 2-Page-Per-Day pages, each with a productivity tip. Pages have no time slots or calendars, so their writing space is larger and more efficient. Neutral colors on daily pages and monthly tabs rotate by quarter. Monthly Tabs have ample space for planning appointments and meetings, with space to list monthly goals and to-dos. A-Z Tabs do double duty as a contact management system and a paper filing system. Use matching Note Pages to capture notes, create lists, and track projects, and then file them behind the appropriate alpha tab. Colored dots code your calendar by priority or activity.



Laura Stack
The Productivity Pro®

E4712

The PROductivity PRO®
Maximum Results. Minimum Time™
TheProductivityPro.com

DAY-TIMER®

For more details and to order, visit daytimer.com/productivity

Developing The Productivity Pro® Planner
by Laura Stack, MBA, CSP

"I've always struggled with creating a paper planner that met my needs and worked with my handheld. I patched together bits and pieces of different systems trying to create the perfect one. Now you can have the EXACT system that I've demonstrated at my seminars! Working with Day-Timers, I designed a planner specifically for those who carry handhelds, which are horrible for taking notes. Every day and month features a new productivity tip written by me. And of course, the whole system is efficient and uncomplicated."

© Copyright 2001-2009, Laura Stack, MBA, CSP. All rights reserved.
The Productivity Pro®, Inc., 9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130
Phone: (303) 471-7401, Email: Laura@TheProductivityPro.com, Web: www.TheProductivityPro.com
Subscribe to free e-zine: http://www.theproductivitypro.com/r_subscribe.htm
Laura's blog: http://www.TheProductivityPro.com/blog