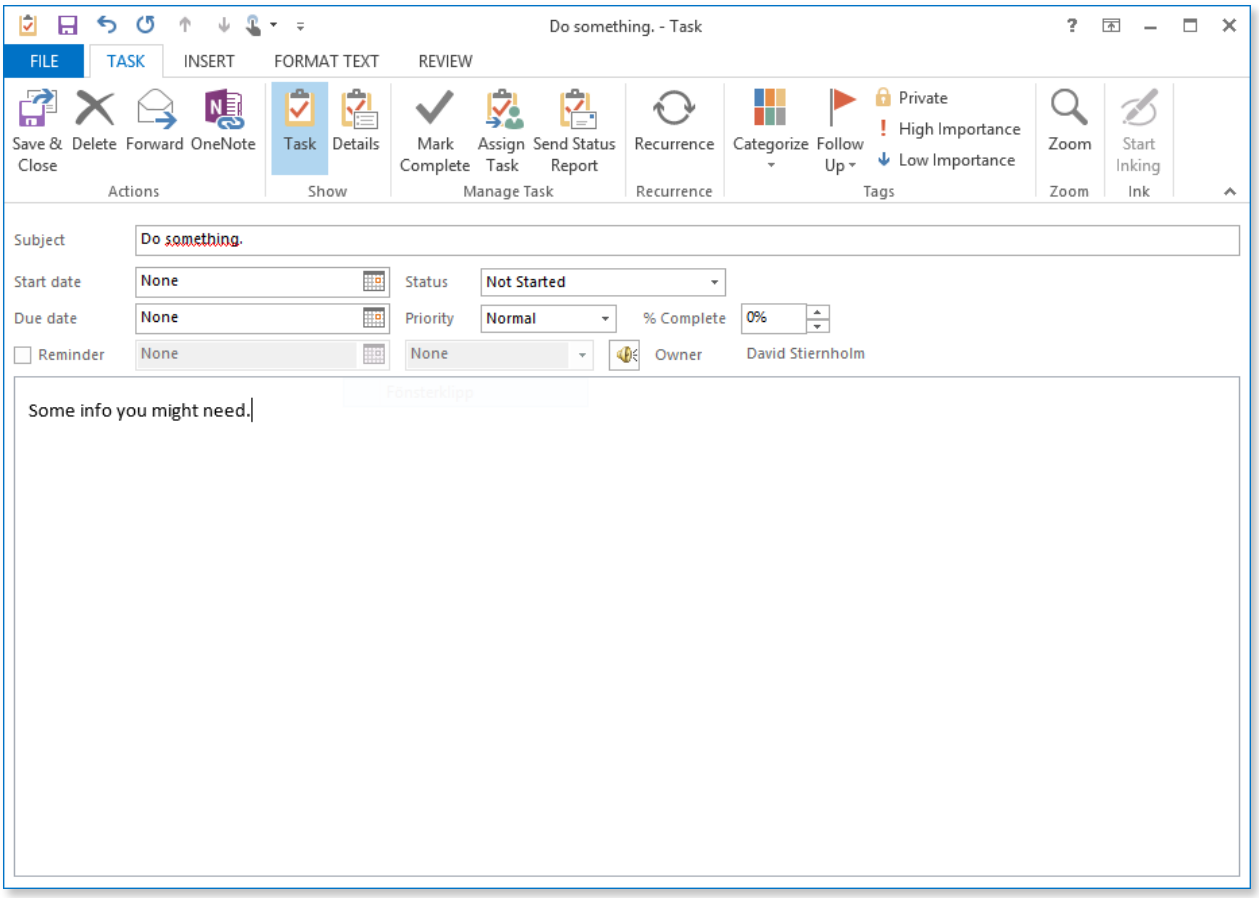
This is how you work with tasks in Outlook 2010 and 2013

Create a new task

1. Click ”New Task” or Ctrl+N in the Tasks-window.



2. Write what you intend to do in the ”Subject”-box. Be as concrete and specific as possible. It is worth the trouble, trust me.
3. Set a due date in the ”Due Date”-box if there is a deadline for when the task needs to be completed. Use due dates sparingly, so that you do not end up with a seemingly delayed, incorrectly estimated to-do-list which you get a bad conscience looking at, for no other reason than that you have set too many unjustified due dates.
4. Give the task a start date if you want it to show up in your daily list a few days in advance of the task’s due date (so that you are reminded to complete it with a bit of margin)

5. Leave the ”Priority”-box blank for now. The task which will be given the highest priority will be determined from one moment to the next, and depends on a combination of how important and urgent it is.
6. In the bottom box you can add notes, information or instructions regarding the task which you will need when completing it. You could for example paste the contents of the e-mail conversation that gave rise to this particular task in the first place, so that the information it contained is easily available.
7. Save and close.

Categorizing the tasks

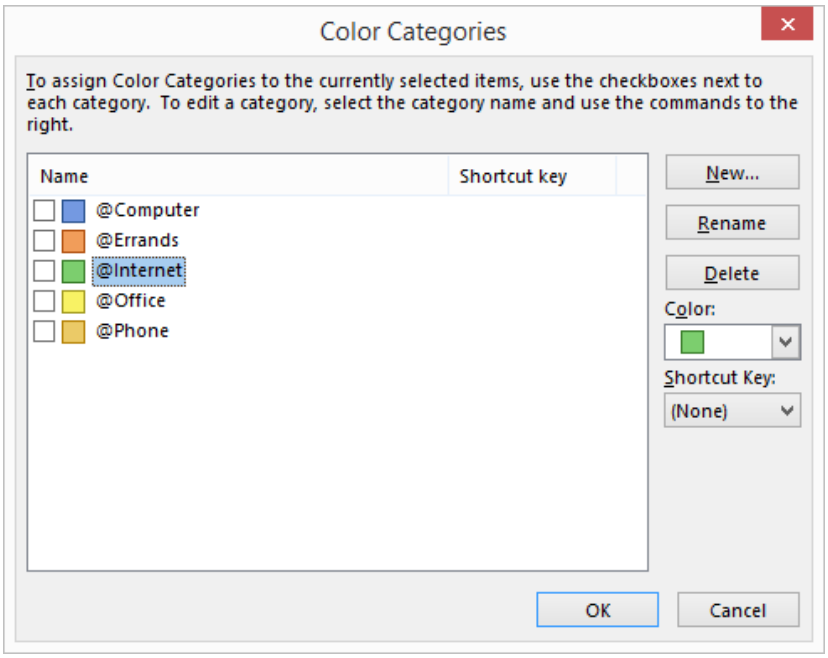
Two common categories are:

- by project
- by context (the context you need to be in in order to do the task)

Context

Use the category-feature mainly for context-categorization. When you get started, do the following:

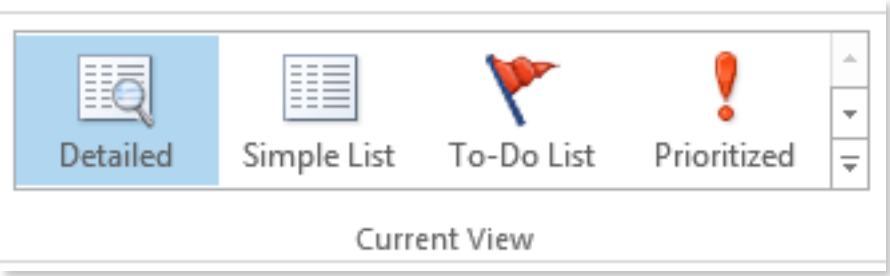
1. Open a task.
2. Click on ”Categorize” and choose ”Manage Categories”.



3. Remove the categories you are not using and create the new contexts you want to use from now on. These might for instance be @Computer, @Internet, @Office, @Phone, @Errands, @Train or something else.
4. If you want to, connect a shortcut command to each and every category so that it becomes easy to set a category when creating a new task.
5. Click ”OK”

Designing views

Once you have entered all your to-do-tasks into the to-do-list, the list tends to look long and appear rather daunting. You should therefore design and customize views so that they only display what you want to see in the situation you are in. It is easiest to start with the standard views and change these according to your preferences. Click on the ”More”-button in the tool-section ”Current view” and choose ”Manage views …”, in order to edit the standard views.

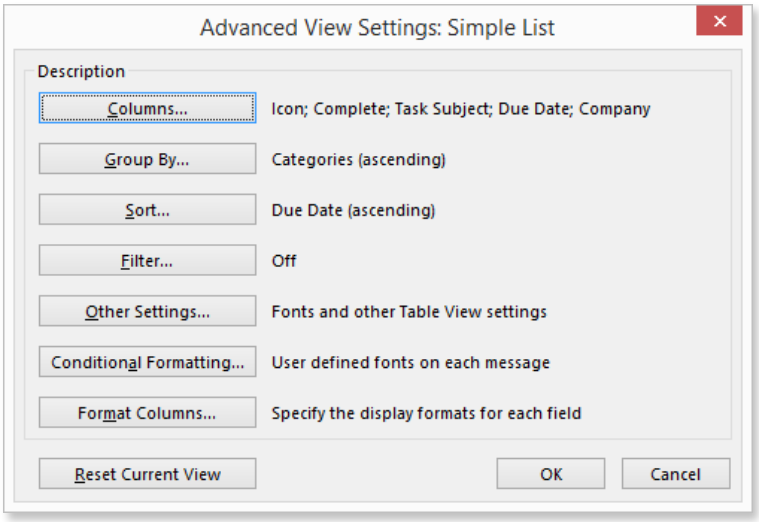


By category

You need a view that displays the tasks grouped by the context you need to be in to complete the task. Choose one of the standard views, such as for example ”Simple list” and change the settings so that it groups the tasks according to categories.

Do this:

1. Mark the ”Simple list”-view in the window ”Manage all views”.
2. Click ”Modify …”



3. This opens the window ”Advanced view settings”.
4. Click ”Group by …”
5. Choose ”Categories” in the window called ”Group objects by”
6. Click ”OK”

You probably do not want to see all the tasks you have completed in the same list as what you have yet to do. If this is the case, then do this:

1. Click ”Filter …”
2. Click on the tab ”Advanced”
3. Click on the button ”Field” and find the field ”Status” in the group ”Frequently-used fields”
4. Change ”Condition:” to ”Not equal to”
5. Set ”Value:” to ”Completed”
6. Click ”Add to list”
7. Click ”OK” and ”OK”, and you will end up back in the view ”Manage all views”

By date

Finally you sometimes need to answer the question ”What do I have to do today, regardless where I have to be to do it and what project it concerns?”. In order to answer this, you need a view that filters tasks by date. As a suggestion, use the ”Active”-view and adapt it to your preferences.

In this view, where tasks are shown according to date, we want to see:

- Tasks which are late
- Tasks which are due today
- Tasks which should be started today (or sooner), even if they are not due yet for a while

It is a little tricky to get these settings rights, so I will give you a shortcut. Do this:

1. Mark the ”Active”-view in the window ”Manage all views”.
2. Click ”Change…”
3. Click ”Filter…”
4. Click on the tab ”SQL”
5. If the box under it is grey, click ”Edit these criteria directly. (et c)”
6. Paste the following text into this box (if you use Outlook 2010):

   ((http://schemas.microsoft.com/mapi/id/{00062003–0000–0000-C000–000000000046}/81050040” <= ‘today’ AND “http://schemas.microsoft.com/mapi/id/{00062003–0000–0000-C000–000000000046}/ 81010003 <> 2) OR (http://schemas.microsoft.com/mapi/id/{00062003– 0000–0000-C000–000000000046}/ 81040040 <= ‘today’ AND http:// schemas.microsoft.com/mapi/id/{00062003–0000–0000-C000–000000000046}/81010003 <> 2))

   or this text (if you are using Outlook 2013):

   ((http://schemas.microsoft.com/mapi/id/{00062003-0000-0000-C000-000000000046}/81050040 <= 'today' AND http://schemas.microsoft.com/mapi/id/{00062003-0000-0000-C000-000000000046}/ 81010003 <> 2) OR (http://schemas.microsoft.com/mapi/id/{00062003-0000-0000-C000-000000000046}/81040040 <= 'today' AND http:// schemas.microsoft.com/mapi/id/{00062003-0000-0000-C000-000000000046}/81010003 <> 2))

7. Click ”OK” and ”OK” and you will end up back in the view ”Manage all views”

Remove columns

Remove all the columns in the views which you are not using. The standard version of most views contains more columns than you will need. The risk with keeping them all is that the list then becomes difficult to read and comprehend since it might contain information which you do not actually care about. Hence, do this:

1. Choose a view and right-click on a column headline and choose ”Field Chooser” from the menu that appears.
2. Click, drag and drop the column headlines you do not wish to keep into the field options-window.
3. If you should find a column in the field options-window which you would want to add to the view, simply click, drag and drop it between two column headlines, and the column will be added to your view.

Columns I recommend you to have in your views are for instance:

- Complete (which gives you a box to check once the task is done)
- Task subject
- Due date
- Categories
- Company (that is to say, project / larger task)

Columns you generally can get rid of:

- In Folder
- Flag
- Created
- % Complete
- Status

Create a task from an e-mail

Instead of flagging an e-mail with a red flag och mark it as unread (even though you have read it) as a signal and indication that you need to do something with this e-mail, transform it into a to-do-task straight away. If you have to do something as a result of an e-mail, there is an action to be taken and hence you have a to-do-task to complete. Therefore do this:

1. In the list of e-mails, click on the e-mail with the left mouse-button and drag the e-mail to the ”Tasks”-button, where you then release it.
2. A new tasks is automatically generated, which has the same subject as the e-mail and the text which the e-mail contained included as a note.

3. Change the subject line of the new task to what the to-do part in the task is comprised of and continue creating and specifying the task just as you always do (following the steps listed above).

Or,

1. In the list of e-mails, right-click on the e-mail and drag it to the ”Tasks”-button where you release it.
2. Now a little menu will open from which you choose ”Copy Here as Task with Attachment”
3. A new task is created which has the entire e-mail in its original format attached in the note-box. Any original attachments which were part of the e-mail will automatically remain.
4. Continue creating and specifying the task as usual.

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