MICROSOFT OUTLOOK'S TASK MANAGEMENT DOWNFALL

AND HOW TO FIX IT

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web: www.blankpage.net.au
call: 04training [0487 24 64 64]

Outlook’s Tasks Downfall

Outlook’s Tasks feature is a great tool for creating reminders to perform tasks. Unfortunately it is often used incorrectly, or not to it’s full potential.

The default Task setup will remind you of older tasks until they are completed, placing them in bold red at the top of the To-Do list, ignoring possibly more important newer tasks.

Flagged emails are converted into To-Do items automatically, but managing flagged items can become an onerous task. Flagging should only be used for emails that contain important information like flight itineraries or price lists, not for task management.

The fact that Outlook keeps reminding you of old, not current, not important tasks is probably the reason why many people abandon the Tasks feature all together, often reverting back to paper-based systems.

Outlook also makes use of two systems to keep track of reminders; Tasks and To-Do Lists.

Tasks are better than To-Do’s because Tasks sync to other devices via 3rd party software, or an Exchange, whereas To-Do’s don’t.

A New Tasks Solution

It’s time to take a new look at how we manage tasks, focus more on managing tasks that relate to the current work day.

Task Control can be broken down into three urgency zones, C I N:

1. Critical
2. If Opportunity Arises or Target Now
3. Near Future

“Critical”

Theses are tasks that have to be completed before the end of the current business day, or very near future for tasks that may require more than a day to complete, like writing a manual.

These tasks have the highest level of urgency and probably also cause you the most anxiety.

The “Critical” list needs to be reviewed often, perhaps once per hour.

“If Opportunity Arises”

These are tasks that you are aware of, and know that you have to do them soon. These tasks are NOT due today. They are not “stay at work late" tasks, but rather "when you have an opportunity to do so" tasks.

They can receive your full attention only once the Critical tasks are completed, or if you have an opportunity to deal with them.

These tasks should only escalate to Critical tasks if they are due on the day, or very near future.

The "Opportunity" list needs to be reviewed at least once per day to see if any tasks have escalated to the "Critical" list.

Do not keep more than 20 tasks in this "Opportunity" list.

Target Now Tasks

Tasks within the "if Opportunity arises" period may escalate suddenly as tasks that you would *Like* to do, but are not urgently due. Getting them done now will help with client relations, make a boss happy or ease future task loads.

"Near Future"

These tasks are beyond your current consideration. In-fact you hardly even think about them at all during the work day.

Plan to review this list only ***once per week***. Decide on a day, perhaps every Monday.

Prioritising Tasks

Outlook can be customised to assign custom priorities to tasks, but this is difficult to impossible in organisations. A simpler solution is just to use the priority tags that come with Outlook.

A task's default priority is set to Normal, however we can use the priority settings to arrange tasks into the three urgency zones as discussed earlier.

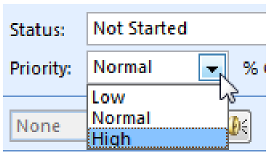
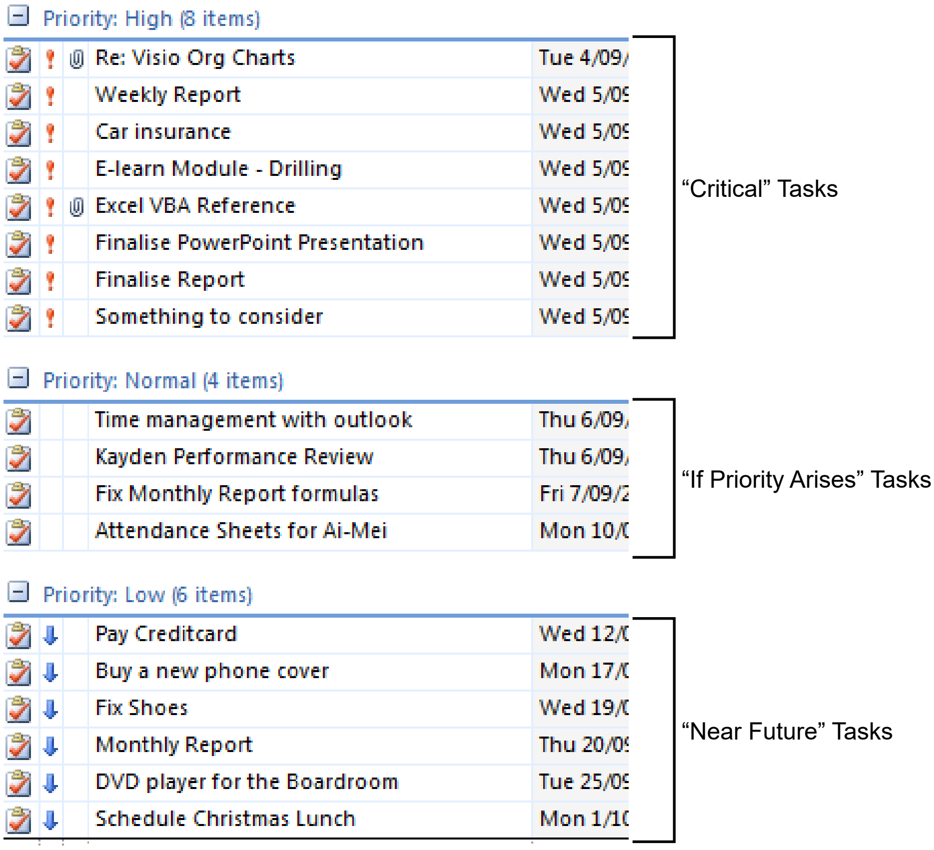


Figure 3.14. Task Priority selection list

The Priority feature is the single most useful feature with task management, and it is this feature that will help us with setting task priority as "Critical", "If Opportunity Arises" and "Near Future".



Customise the Task view

Here's How — How to Customise the Detailed Task View

1. Ensure that the **Tasks view**, on the left of the screen, is selected, not the To-Do List.
2. Click on Change View and select the view that you want to edit.

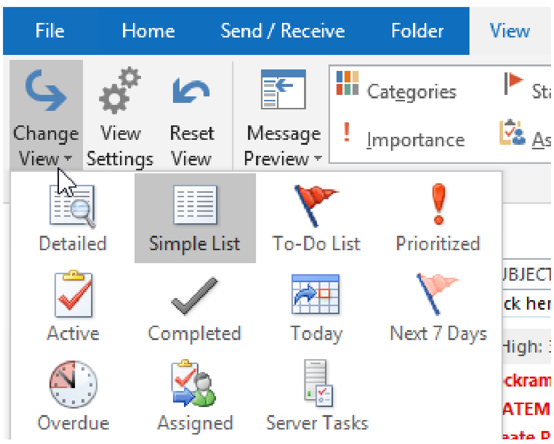


Figure 3.15. Change View

We normally edit the Simple List and the Completed views. You can then save the custom view with a new name and reset the Simple List view. It is just a good starting point to select one of the preset views first.

3. Select the View tab and click on **View Settings**.

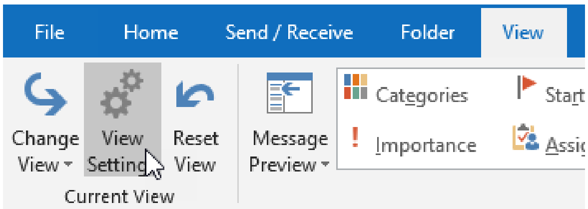


Figure 3.16. View Settings

The Advanced View Settings for the selected view will open.

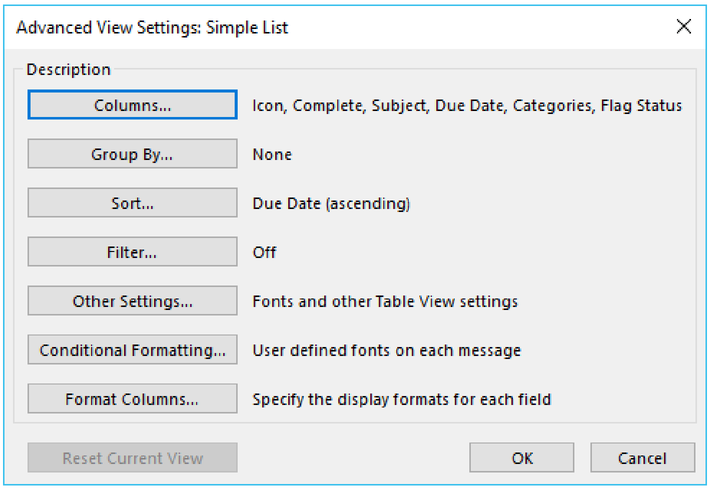


Figure 3.17. Customise View: To-Do List

Columns

The Columns portion of the dialog box can be used to choose which columns of information to display in the Task View.

4. Click on **Columns**.
5. Select All Task fields from the second drop-down list. This helps down to narrow down the available columns to task related columns.

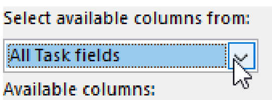


Figure 3.18. All Task fields

6. Add the fields/columns from the left that contains the most relevant information for you.

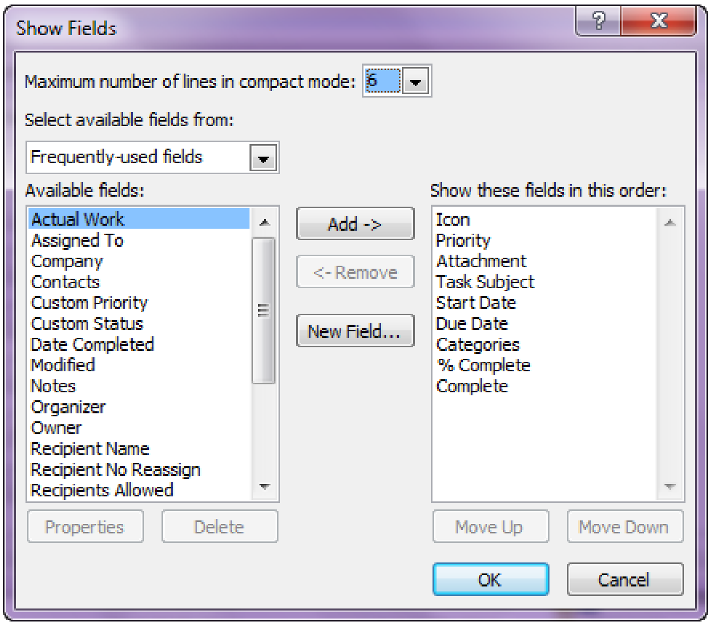


Figure 3.19. Field Chooser

7. Remove unwanted fields from the right-hand-side window.

   Blank Page recommends the following fields for the Detailed view tasks list:

   a. Icon (Helps identify the type of Task.)
   b. Priority (You're going to Group by Priority.)
   c. Attachment
   d. Task Subject
   e. Start Date
   f. Due Date
   g. Complete (Adds a check box for easy marking as completed.)
   h. Additional fields like Categories % Complete, Requested By and Assigned To can also be added if required.

8. Rearrange the Fields by dragging them up and down into the order that you want them.
9. Click **OK** to be returned to the Customise View dialog box.

Group By...

The Group By settings can be used to group Tasks by a certain field, like Priority.

10. Click on **Group By**.

    The Group By dialog box opens.

11. **Deselect** Automatically group according to arrangement.

12. From the **Group items by** list select **Priority**, **Descending**.

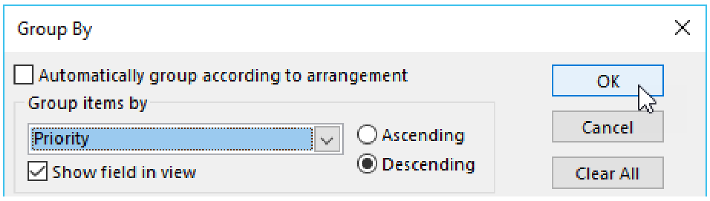


Figure 3.20. Group By

13. Click **OK** to be returned to the Customise View dialog box.

Sort...

Sort can be used specify the order in which to display the tasks in you list.

14. Click on **Sort**.

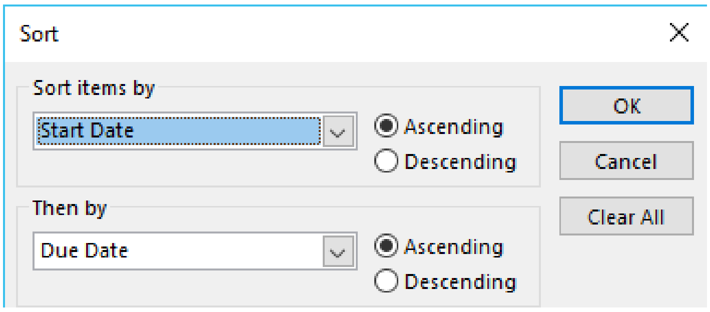


Figure 3.21. Sort

15. Select **Start Date** from Sort items by and select **Ascending**.
16. Select **Due Date** from Then by, also **Ascending**.
17. Click **OK**, to be returned to the Customise View dialog box.

Filter...

The Filter settings can be used to hide Completed tasks, irrelevant tasks or Flagged emails from the Task View.

18. Click on **Filter**.
19. Click on the **Advanced** tab

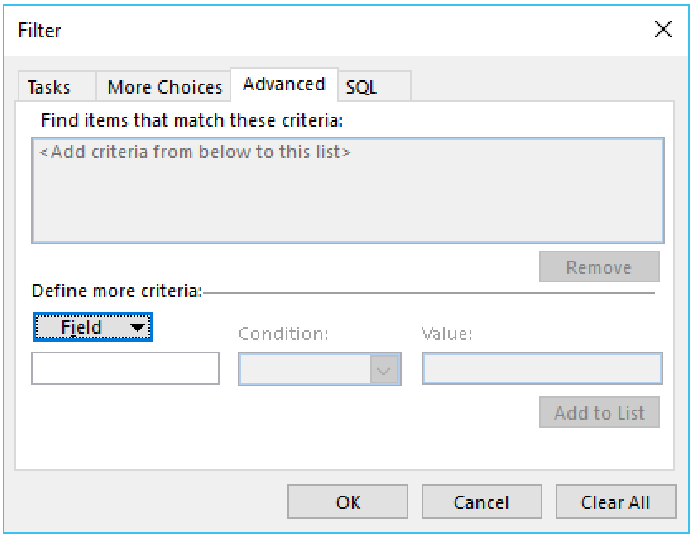


Figure 3.22. Advanced Filters

20. Depending on which Task View you're customising, the Filter list might be empty or have some existing filters.

Filter out Flagged Emails

21. Click the **Field** menu button, select **All Mail Fields**, click **Follow Up Flag**, under Condition select **is empty**.
22. Click **Add to List**.

Filter out Completed Tasks from the View

23. Click the **Field** menu button, select **All Task Fields**, click **Date Completed**, under Condition, select **does not exist**.
24. Click **Add to List**.
25. Click **OK** to be returned to the Customise View dialog box.

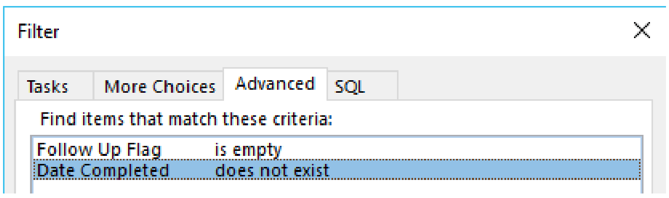


Figure 3.23. Recommended Filters

Format Columns...

The Format Columns feature can be used to modify the appearance of the values in each column, like the dates.

26. Click the Format Columns button.

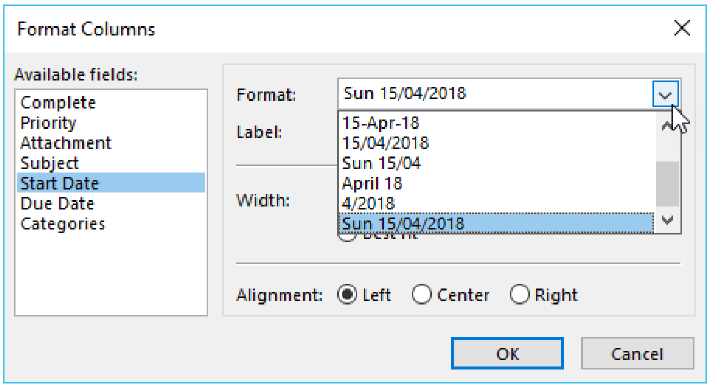


Figure 3.24. Format Columns

27. Select the Column Field on the right and choose the required formatting from the left section of the dialog box.
28. Click **OK** to be returned to the Customise View dialog box.

Save Custom View

Once you've spent time creating a custom view you should save it so that you can reset your view back to how you want it if you happen to mess up the view settings in the future.

Here's How How to Save a Custom View

1. Select the **View** tab in the **Ribbon**.
2. Select **Change View**.
3. Select **Save Current View As a New View**.

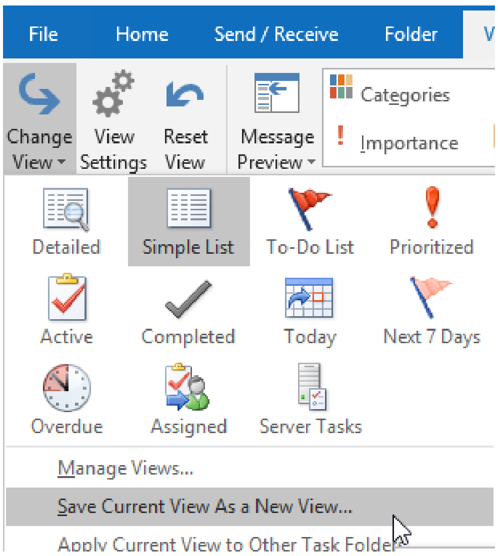


Figure 3.25. Save Current View As a New View option

4. Enter a Name for the new view.

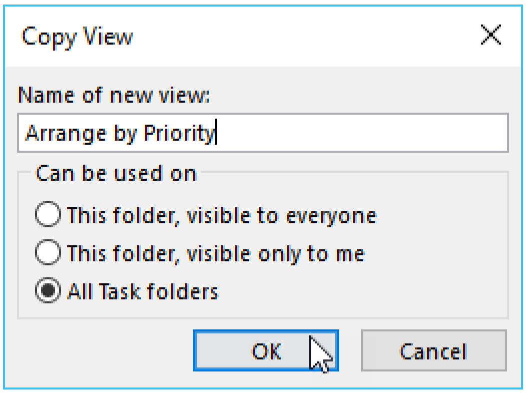


Figure 3.26. New View

5. Click OK.

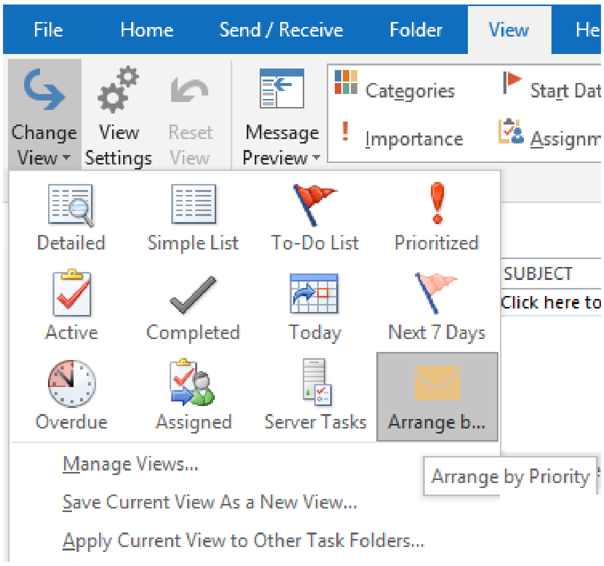


Figure 3.27. Example New Task View

To-Do Bar Tasks

The To-Do Bar can display up to three different types of information; Calendar, People and Tasks. The Task portion of the To-Do Bar can also be customised to only display the Tasks you want.

Here's How | **How to Customise the Tasks view in the To-Do Bar**

1. Right-click on the Task Field headings (the bit that says **Arrange by**:...)in the To-Do Bar, select **View Settings**.

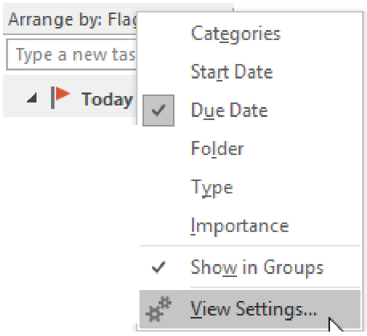


Figure 3.28. How to Access View Settings

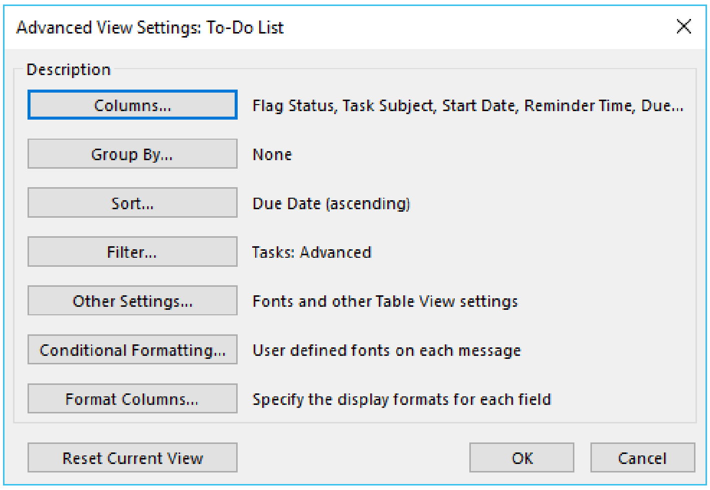


Figure 3.29. Customise View: To-Do List

Other Settings...

The width of the To-Do bar is quite narrow, so Outlook does not display the field headings for the columns. We can use Other Settings to change this.

2. Click on **Other Settings**.
3. Deselect **Use compact layout in widths smaller then xx characters** under Other Options at the bottom of the dialog box.

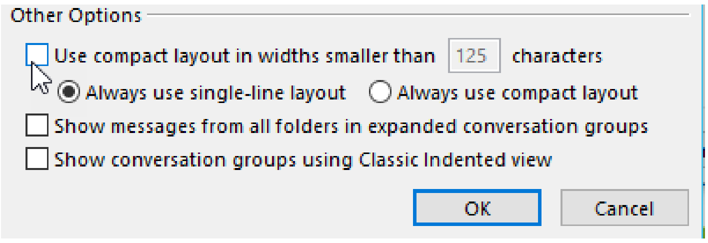


Figure 3.30. Other Options

4. Click **OK**, to be returned to the Customise View dialog box.

Columns

5. Click on **Columns**.

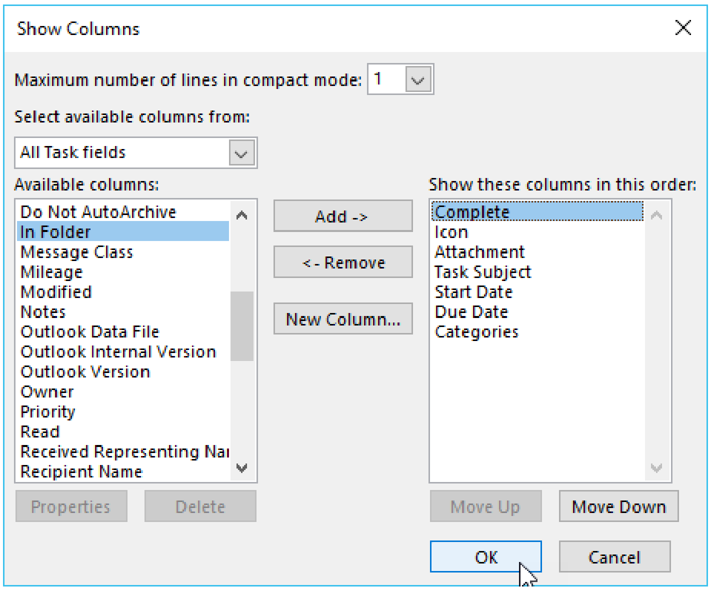


Figure 3.31. Show Columns

6. Select the required fields from the left list of available fields and add them to the right-hand-side window, or remove unwanted fields from the right-hand-side window. Due to the limited width in this view we won't add too many columns.

   Blank Page recommends the following fields for the To-Do Bar tasks list:

   a. Complete
   b. Icon
   c. Attachment (Indicates if a Task has associated documentation attached)
   d. Task Subject
   e. Start Date
   f. Additional fields like Categories and % Complete can also be added if required.

7. Click **OK** to be returned to the Customise View dialog box.

Group By...

8. Click on **Group By**.

   The Group By dialog box opens.

9. **Deselect** Automatically group according to arrangement.

10. From the **Group items by** list select **None**.

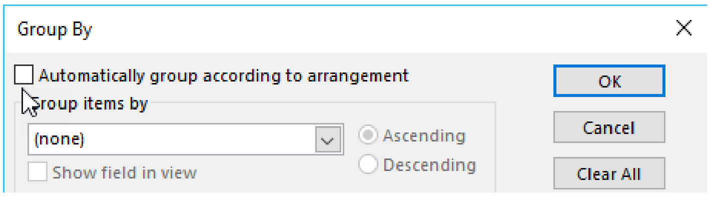


Figure 3.32. Group By

11. Click **OK** to be returned to the Customise View dialog box.

Sort...

12. Click on **Sort**.

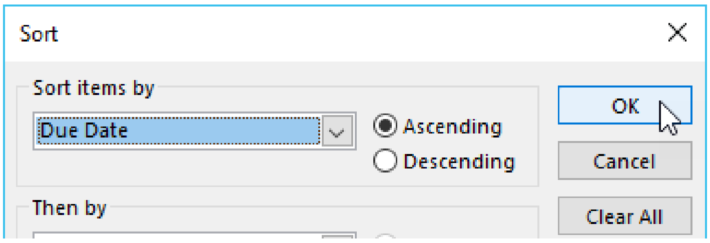


Figure 3.33. Sort

13. Select **Due Date** from Sort items by and select **Ascending**.

14. Click **OK**, to be returned to the Customise View dialog box.

Filter...

The Filter settings can be used to hide irrelevant tasks. The aim is to view current Critical tasks for the day, and tasks in progress.

15. Click on **Filter**.

16. Click on the Advanced tab

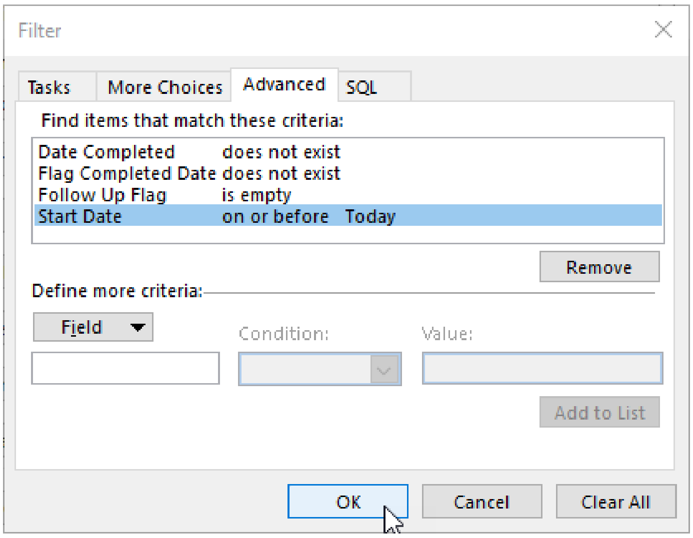


Figure 3.34. Advanced Filters

Hide Flagged emails

17. Click the **Field** menu button, select **All Mail Fields**, click **Follow Up Flag**, under Condition select **is empty**.
18. Click **Add to List**.

Show only Tasks in Progress

19. Click the **Field** menu button, select **All Task Fields**, click **Start Date**, under Condition select **on or before**, type in **Today** in the Value field.
20. Click **Add to List**.

Hide Completed Tasks

21. If the default Date Completed filter is not in the Filter list do the following:
22. Click the **Field** menu button, select **All Task Fields**, click **Date Completed**, under Condition, select **does not exist**.
23. Click **Add to List**.
24. Click **OK** to be returned to the Customise View dialog box.

Format Columns...

The Format Columns feature can be used to modify the appearance of the values in each column, like the dates. Due to the width limitation of the To-Do Bar, we can reduce the length of the dates.

25. Click the **Format Columns** button.

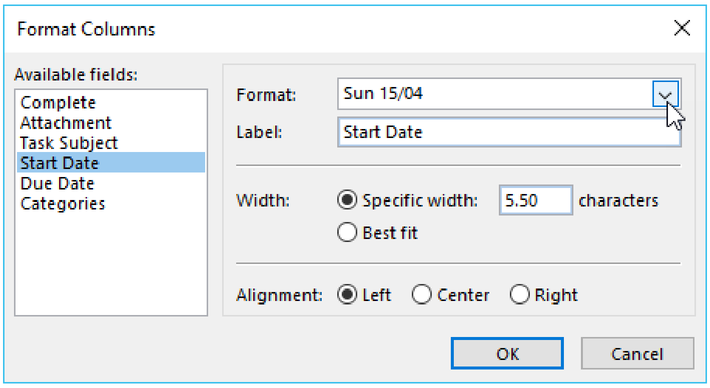


Figure 3.35. Format Columns

26. Select the Column Field on the right and choose the required formatting from the left section of the dialog box.
27. Click **OK** to be returned to the Customise View dialog box.
28. You may need to adjust the widths of the To-Do Bar and the Task columns to present the information a bit better.

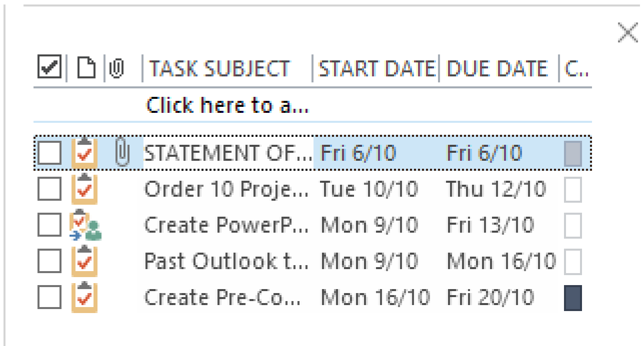


Figure 3.36. Example Task View in the To-Do Bar

What About Flags?

Flagged emails are converted into To-Do items automatically, but managing flagged items can become an onerous task. Flagging should only be used for emails that contain important information like flight itineraries or price lists, not for task management.

Create a Search Folder to view Flagged emails.

Search Folders

Outlook organises items by using folders, Inbox, Sent Items and Drafts are a few examples. Search folders are virtual folders designed to display the results of a search.

Search folders are different from normal folders in that they are virtual folders that contain views of certain email items.

Each Search Folder is simply a saved search that is kept up to date, monitoring all the folders.

Figure 3.37. Search Folders

Here's How **How to use Search Folders**

1. **Click** on a **Search Folder** to view its contents.

   Once an email message no longer meet the search criteria for the folder, it will be removed, like an unread message that becomes marked as read.

Custom Search Folders

New Search Folders can be created at any time and they can define specific search criteria that email messages must meet to be displayed in the Search Folder.

Here's How **How to create custom Search Folders**

1. Right click on the Search Folders folder under your Inbox, select **New Search Folder**.

Figure 3.38. New Search Folder

2. Click **Search Folder**.

   The New Search Folder dialog box opens.

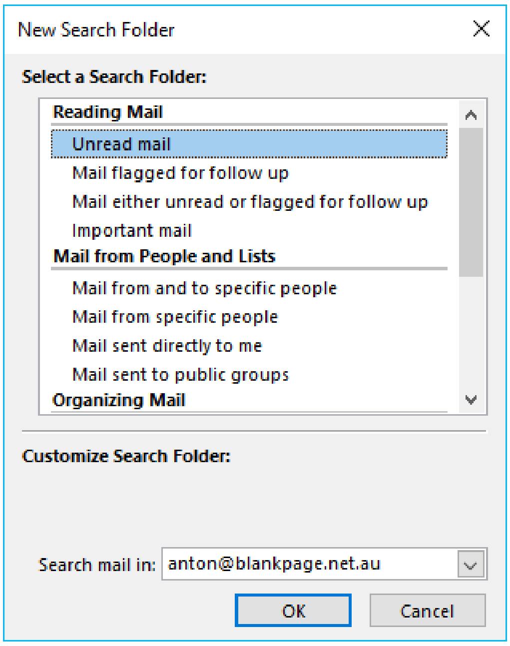


Figure 3.39. New Search Folder

3. Select the required **Search Criteria**.

   OR

4. Complete the **Create Custom Search Folder** section.
5. Click **OK**.

Converting Emails into Tasks

Converting emails to tasks is a great way to keep your Inbox size under control an also to avoid losing and forgetting about tasks in your inbox.

Here's How | **How to convert emails into Tasks**

1. Use the right mouse button, and drag the email from the Inbox on top of the Tasks icon in the Navigation Pane.

   A contextual menu will open.

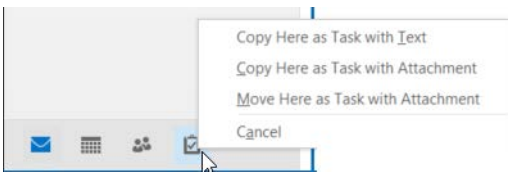


Figure 3.40. Create Task via right-mouse drag

2. Select the required action to take:

   Copy Here as Task with Text

   Will create a new Task with the text from the email copied into the task's details text area.

   Copy Here as Task with Attachment

   Will create a new Task with the email attached.

   Move Here as Task with Attachment

   Will create a new Task with the email attached, and also remove the email from the inbox. This is the preferred way, because the Inbox is also kept under control