

MICROSOFT OUTLOOK

David Longstaff
Positive People

Set up guide – supporting participants of our courses.

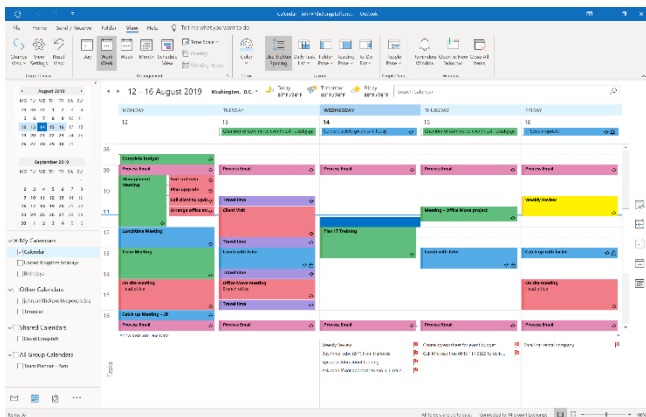
For further information please visit [our website](#)

Contents

Overview.....	2
Setting up the Task Views	3
Creating Tasks manually	5
Making Emails into Tasks	6
Consolidated view of Calendar and Tasks	7
Using Quick Steps	9
Setting up a "Waiting For" Rule	11
Going mobile - Microsoft To-Do with Outlook Tasks.....	14
Quick Parts.....	16
Getting a Fresh Start.....	17

Overview

This document demonstrates features and functions in Microsoft Outlook to help handle your work effectively, get the inbox back to empty and develop your own comprehensive solution.



The material provides additional support to those who have attended our training seminars and coaching programmes which are designed to support busy professionals manage their complex workload with less stress.

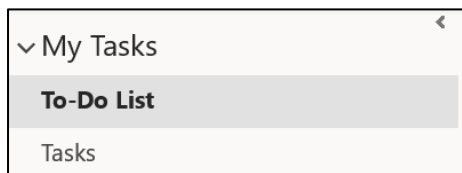
You might also want to check out the Microsoft OneNote section of our website (www.easetheload.com) as it can enhance your

system further and fill in the gaps that Outlook has from the workload model. This guide also includes a mobile solution using Microsoft To-Do to use Outlook Tasks on the go.

This document uses the Outlook 2016 client for Office 365 on a Windows computer. For the purposes of these demonstrations, the functionality is almost identical in other Windows versions of Outlook but doesn't work the same on the Web or Mac version. That said, the basic ideas are still there and updates to these versions are adding very useful functionality. Please remember, there is no absolute right way to set this up, so feel free to adjust these techniques.

Setting up the Task Views

Most will be familiar with basic Outlook features. Email, Calendar and limited use of Contacts (People). Not so many use Outlook Tasks and here's why. It tends to be a long unwieldy list. But it can be very effective with some tweaks.



The first thing to point out is of the Tasks function, on the left panel you will see a To-Do List and a Tasks folder for your mailbox (and possibly Task folders for other shared mailboxes).

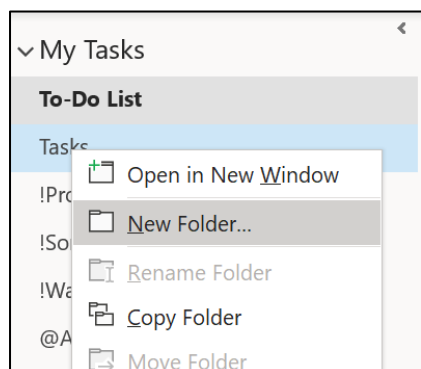
The To-Do List option will show you tasks from any mailbox and also emails flagged in your default mailbox. You may already have a lot of red items in this list, if you flag emails. We'll come back to this view later.

For now, we are going to create some Task folders. The benefit is that you won't have a single huge task list; instead we will divide them into various sub-sets. Not too many; just enough - start with less and add more if you need to.

How should you divide your tasks? I tend to find a couple of workable options. It could be what it's about - so task folders for Admin, Sales, Research, Training, and so forth.

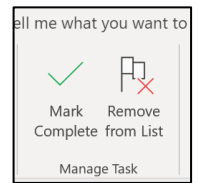
Or it could be about how you do the tasks (what David Allen refers to in GTD as "contexts"). These might be an Agenda list for your boss, Agenda list for your team, phone calls list, headspace list for things that need some quiet time, a braindead list of things that don't need much energy, a waiting for list of things you need from other people, a someday/maybe list of ideas for the future.

All of that is covered in more depth in the Organize section of Workflow in our training seminars. I recommend giving this some thought, although you can change your groupings in the future. If you think it would be helpful to use both approaches, in other words, this topic is a Sales thing and I need to raise it at the next team meeting, I will show you how to do this by syncing Outlook Tasks with Microsoft To-Do.

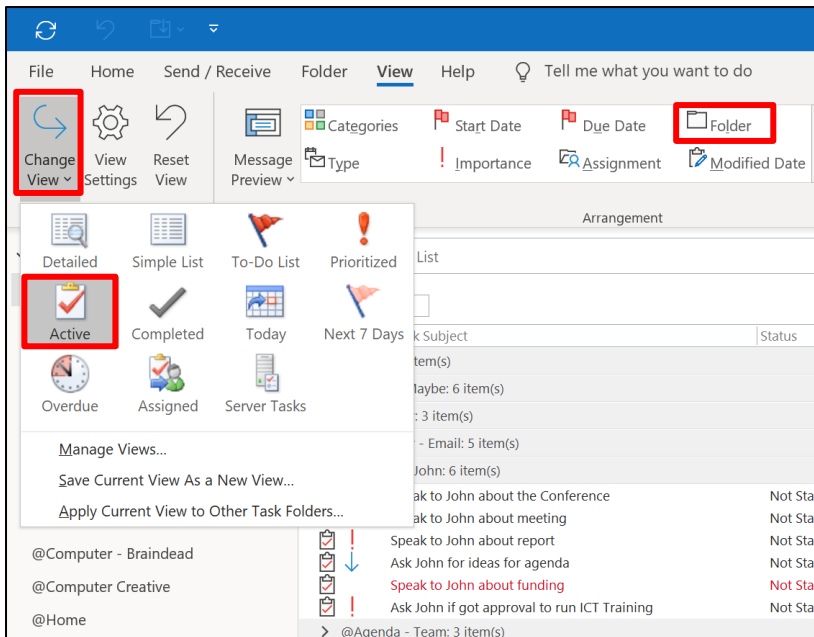


So, to create these groupings, right click on your Tasks folder (not the To-Do list or a shared mailbox Tasks folder). Choose "New Folder ..." and type your first folder, hit the Enter button. Then right click on your root Tasks folder again and choose "New Folder ..." - repeating this as many times as you need to create your structure. You can edit this as many times as you want in the future.

That's the basic set-up, but you might want to use the To-Do list view as well. By default, this is a long red list (often filled with flagged emails), but we can adapt this. If you want to get a fresh start, and the flags on the emails are not working, meaningless, click Ctrl + A, to select everything, then select "Remove from List" on the top menu.



If you feel the flagged emails do have meaning, skip this step, but I would recommend you come back to these flagged emails in the next few days and remove the flags from irrelevant ones and convert the others as we will demonstrate later.



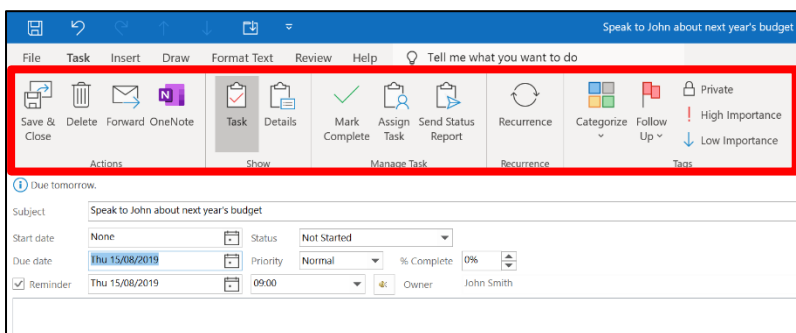
Now select the "View" tab from the top, "Change View" and select the "Active View". Finally, change the arrangement (sorting) of tasks to be by "Folder" rather than "Due Date".

You'll see that you can edit these views very quickly at any time. That's all the setup done. In the next section we'll show you how to start populating these lists.

Creating Tasks manually

To start creating tasks, select one of your task folders first - for example "Agenda - John". As an aside, if you forget to navigate to the correct folder, the task will be created in the root folder and can be moved later.

Now select "New Task" and the subject line is the title of the task. Good practice for any tool you use for To Do lists includes starting the task with an action word (the more specific the better) and plenty of detail so that you don't have to rethink it when you see it a week later. Many times, I see "John" on someone's To Do list, which was clear when they wrote it down, but quickly loses its meaning.



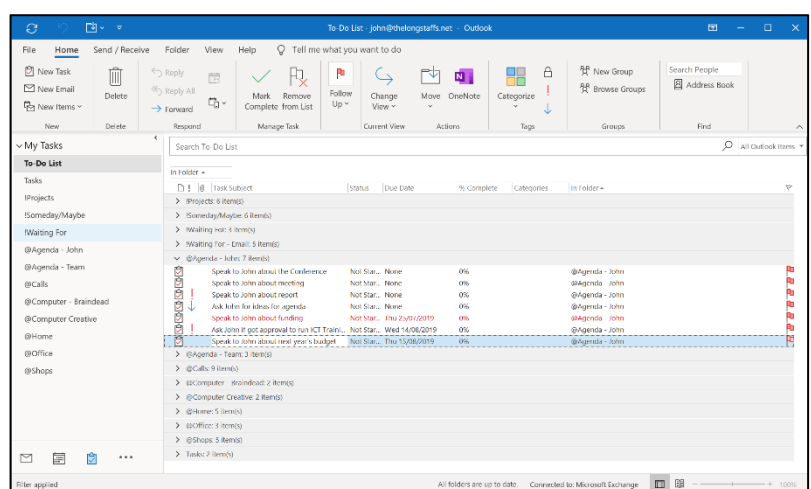
Now add a due date, if it truly has one. I will show you how due dates can be useful when using your calendar to also see tasks. For now, why not add one for this test? Other features on the top menu include a "Priority" level. This is set to

"Normal". Why not change the priority for this first task to "high" (again I will show you how this can be useful in a later section)? Use "high priority" sparingly, otherwise it loses its value.

You can make tasks private, which might not be necessary because unlike your calendar, tasks are not usually shared by default. There are options for recurrence, which is useful for regular tasks and works similarly to recurring appointments, with plenty of options. You can assign tasks to other people; this isn't a feature I use; I'll show you another way later. You can mark a task as complete; there are other ways to do that which I'll point out later.

There's also a way to send tasks to OneNote - there is a OneNote button in most Outlook menus. These are reviewed in the OneNote section of our website.

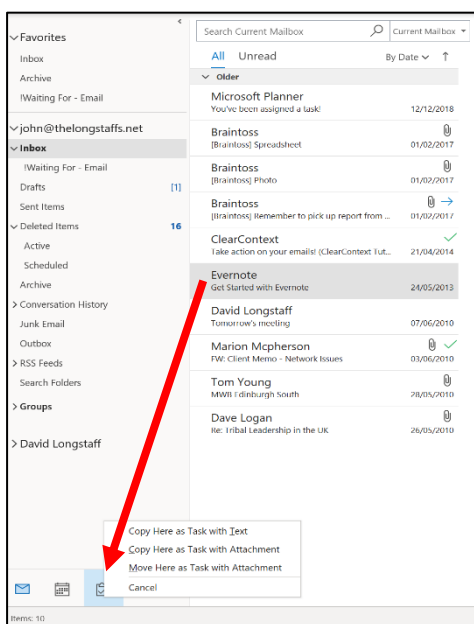
There are plenty of other task options, but these are the basic that I use. I suggest now quickly creating two or three more real tasks as we have done above, finding them on your Outlook Tasks list, before moving to the next section.



Making Emails into Tasks

If much of your work is derived from incoming emails, how can you make an email into a task? There are a couple of ways. The default method is to flag an email - that's not always wrong, but there are a few weaknesses. Firstly, very few emails have a subject line that defines the task. In addition, the flag automatically gives a due date of today, so we end up with a long list of flagged emails which go red.

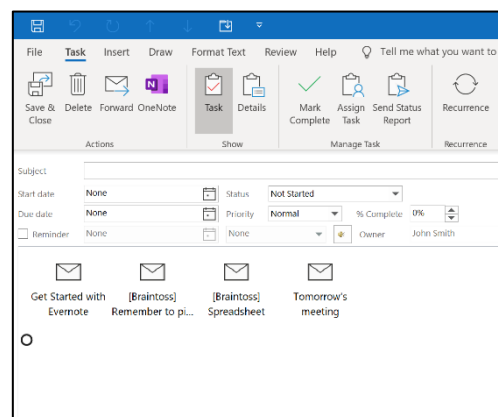
Another method which is more flexible and powerful is to drag the email down to the Task Bar and drop the email. This now creates a new task from the content of the email - at this stage the subject line is still the same as the email, but you can change that to be more meaningful. Add additional details (as you would a [manual task](#)), click save and close and now you have made a new task from the email.



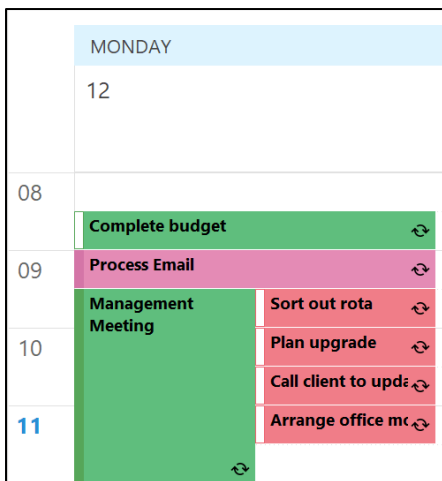
There are some useful variations on drag and drop. For example, an email may have come in from an external person asking to meet (rather than a meeting request), so we can drag the email to the Calendar and it now creates a new appointment. Again, change the details, date and time, and save and close.

If an email has an attachment (perhaps an agenda for the meeting), the standard drag-and-drop loses the attachment. However, if you hold down the right mouse button and then drag and drop to the calendar it offers to take the attachment of the email, which also allows you to work later with the email in its original format.

Based on that, if you ever get multiple emails about the same thing (task or appointment), select the emails using the control key and click the mouse on the emails. Hold down the right mouse button, drag-and-drop to tasks and choose the second or third options (copy or move emails as Task with Attachments). It will now create one new task with the emails as attachments in the task. It's based on this that we can begin to get our email inbox to empty, which I will cover [in a later section](#).

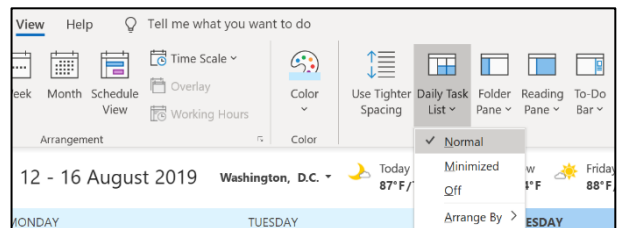


Consolidated view of Calendar and Tasks

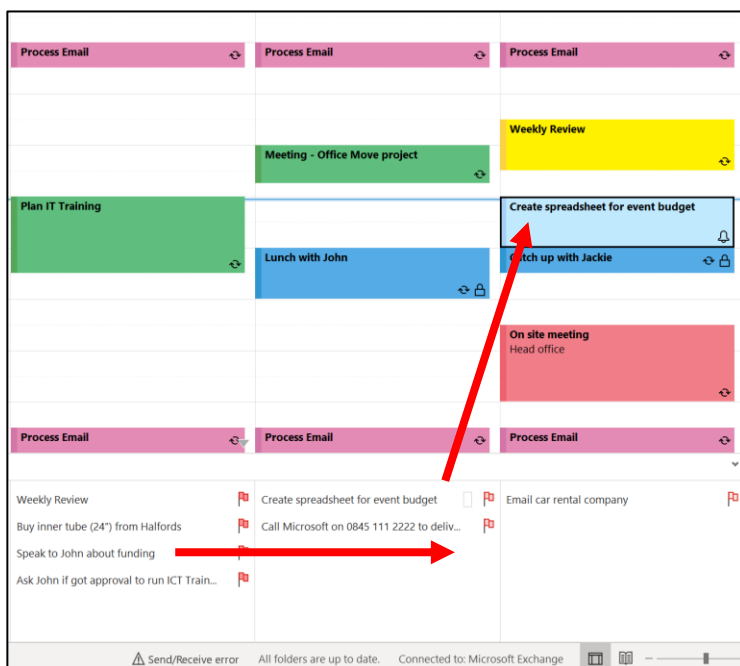


Because many feel more comfortable using calendar rather than tasks, we end up putting all of our tasks in the calendar. People quickly fill up Monday morning with lots of 30-minute tasks - things they need to do in the next few days. There are a few weaknesses with this technique - first it fills up the calendar with things we can't actually do at that time, because, for example, we are already in a meeting. So, then we have to remember to keep moving them along, or we've lost them in a few days.

Instead, as long as you are viewing your own calendar (not someone else's), and as long as you aren't in the month view, you can choose the "View" tab, then the "Daily Task List". Set this to "Normal" and the tasks will now show underneath the calendar based on their due date.



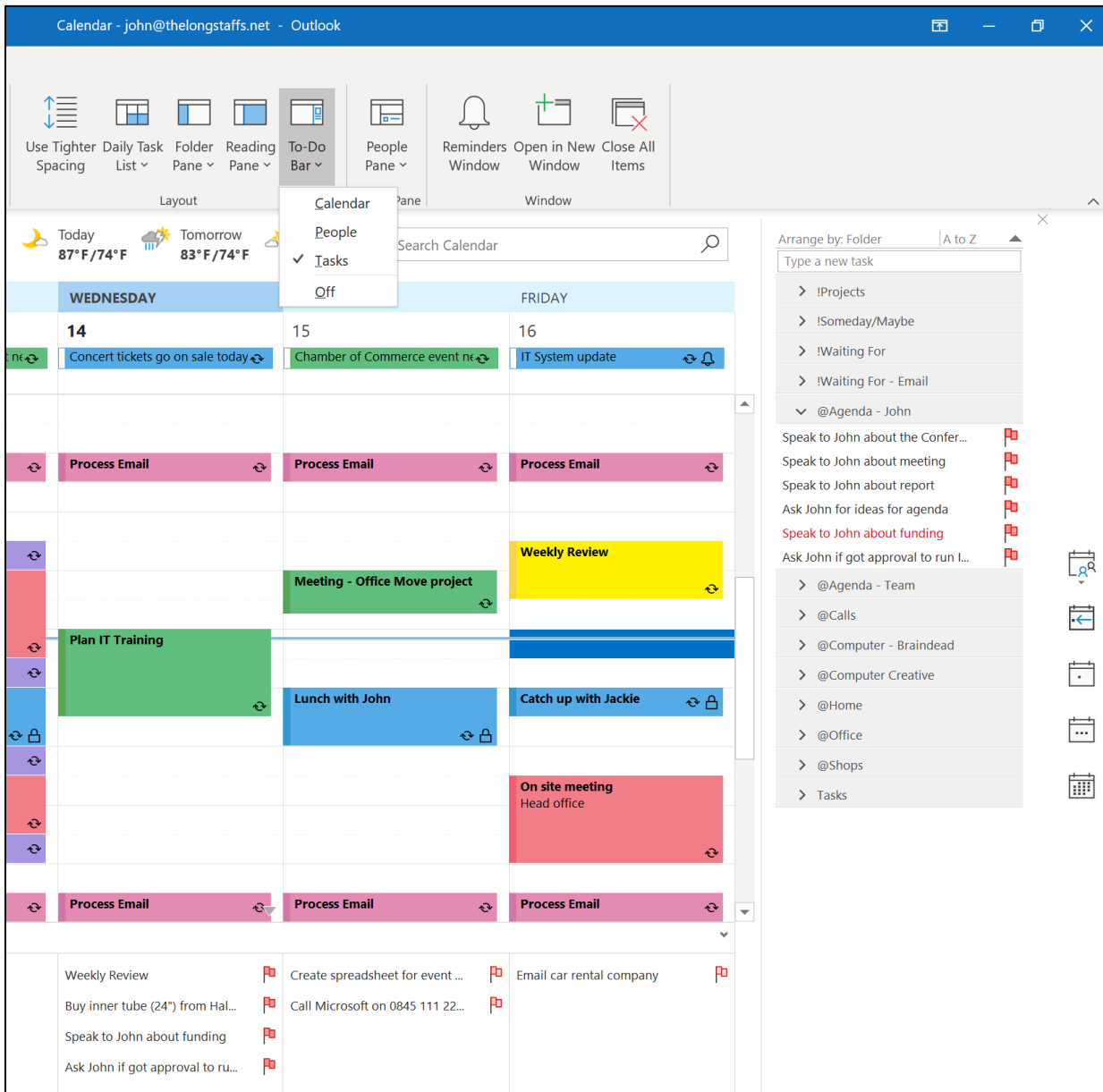
The benefit of this, is that tasks with due dates of yesterday or older, won't be lost, but instead will move along each day until we've marked them as completed. For example, you might start Monday morning with some planning and notice the start of the week is full of meetings (that's a whole different topic!) but a little more space later in the week. So, you can drag the tasks further into the week and that updates their due dates, making the week a little more manageable.



You might also decide that one of these tasks is a lengthy process and want to block time in the calendar for it before anyone else books a meeting. Drag the task to the calendar and now an appointment is created as a separate entity to the task.

In addition, there could be a meeting that you need to prepare for. You can drag an appointment to the Daily Task List and it will create a new task, independent but based on the appointment in the calendar.

The Daily Task List can be very useful but doesn't have much flexibility. For example, it won't show tasks that don't have a due date. However, there is another option; select the Tasks from the To-Do bar which will now show your Tasks to the right hand side of the calendar and this has more options including changing the sorting by Due Date, sorting them by Folder, create filters and more.



As an aside, the main way to mark a task as complete, is to click the red flag. Doing that doesn't delete the task, it just moves it from the active view to the "Completed" view. This is useful as it keeps an audit trail of tasks you have completed, adding an additional automatic field, showing the date they were completed.

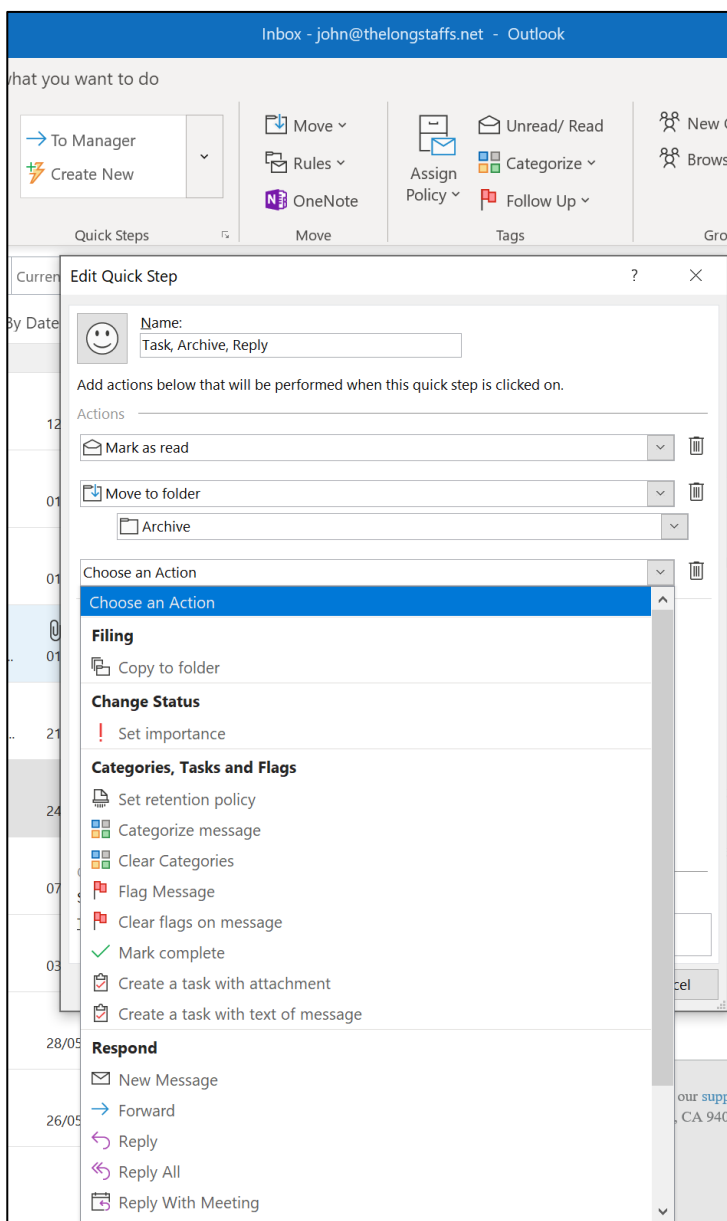
So, Outlook Tasks can be as powerful and useful as the Outlook Calendar, it just takes a little set-up.

Using Quick Steps

Imagine if you could create a button that will run multiple actions over a single or series of emails. Ever since Outlook 2010 this has been possible using a highly configurable feature called Quick Steps. You won't find Quick Steps in Calendar, Tasks, People - only Email. Quick Steps are in the centre of the Home tab within Email.

You will see Microsoft have given you some built-in Quick Steps such as a "Team Email". The first time you click the button it asks you to configure and save it and that is the Quick Step ready to use.

But as a more comprehensive example, suppose we could create a button that takes an email, marks it as read, moves it to a folder, creates a new task from the email and sends a quick response to the sender acknowledging it and letting them know you will get back to them shortly...



To set up this example, click on "Create New" (it has a lightning icon with it). Now select a name that is more meaningful. You can change the icon if you like pretty buttons.

Now select "Choose an Action" and keep on adding as many actions as needed to create the process; think of these options as ingredients so you can build your own recipes.

For my example, I'll choose "Mark as read" from the Change Status section. Then choose "Add Action" and "Move to folder" from the Filing options. Select a suitable folder (you can leave to always ask you which folder to put it into), but if you like the idea of a simplified folder structure, choose the "Archive" folder which you will likely already have.

Then add another action and choose "Create Task" (either with attachment or just the text) and finally "Reply" or "Reply All" from the Respond section. If you click on "Show Options" you will notice it now allows further refinement of the Quick Step - for example you can pre-populate the text. Something like "Hi, thanks for your email. I will get back to you in ...". You can include lots of text, signatures, and so on.

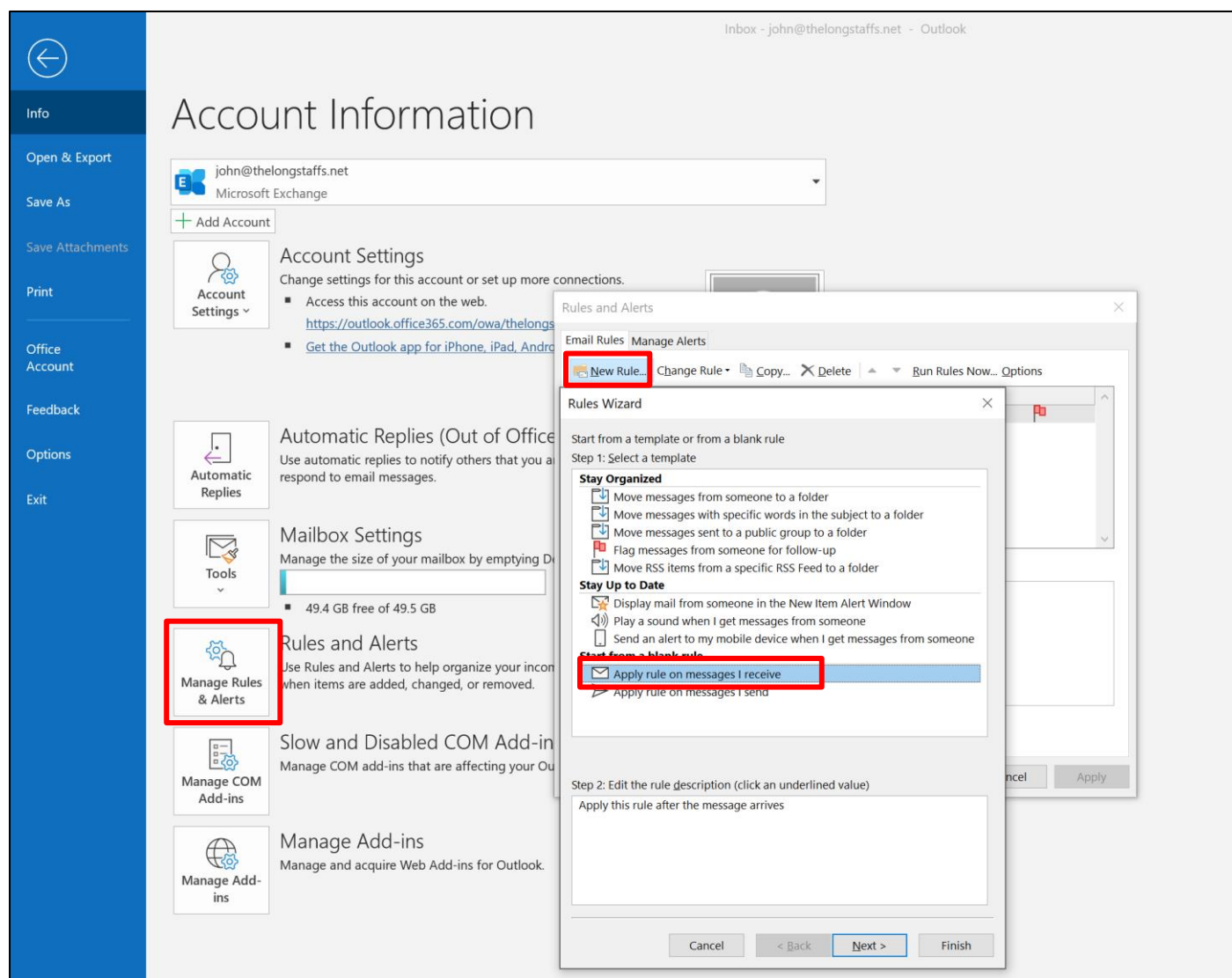
Now select "Finish" and you will see a new button in your Quick Steps. If you select an email and the new button and you will notice all the actions happen in one go.

As an aside, if you select multiple emails, you will notice that some Quick Steps are greyed out, while some are still available - this is because some actions can't be run over multiple emails while others can. Above is only one example; why not after think about what Quick Steps might make your life easier?

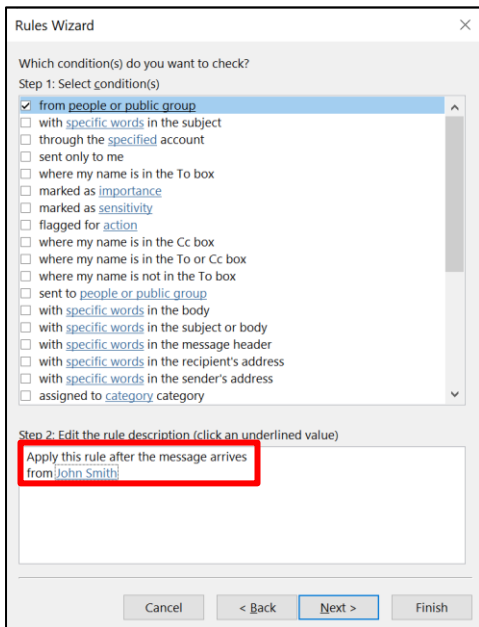
Setting up a "Waiting For" Rule

For many people, it can be complicated keeping a handle on all the responses they are awaiting from other people; within their teams, other colleagues or even external parties. Read receipts aren't that effective, but there is a powerful method by creating a rule. Rules and Quick Steps (covered in an [earlier section](#)) have similar functionality but while a Quick Step runs a series of actions when you click on a button, a rule is constantly sitting in the background waiting for a condition to be met and then will run these actions.

So, we are going to create a process where if we need to track an email response from a recipient, we will include our self in the bcc field (so that it doesn't create any confusion for the main recipient). A rule will then be running, waiting for an email to come into your inbox from you (in this case because you've bcc'ed it to yourself into it) and then move it to a "Waiting For" folder, flag it and be available for us to see in our Outlook Tasks view.



To create the rule, from the main Outlook screen, choose "File" and then "Manage Rules and Alerts" - you may have to make sure you are online to do this. This will present a list of rules you currently have running (if any are in red, this is likely because they have an error).

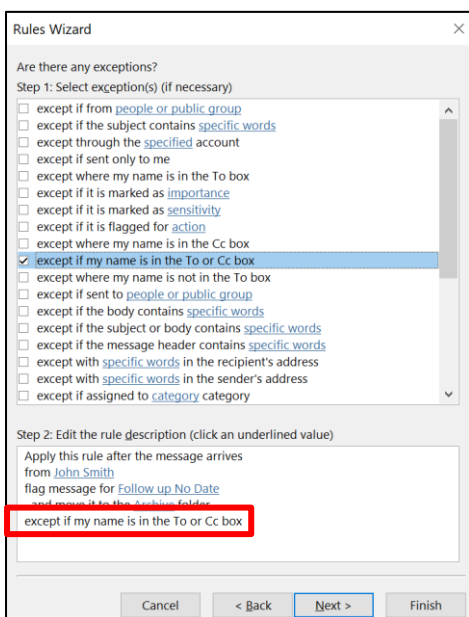
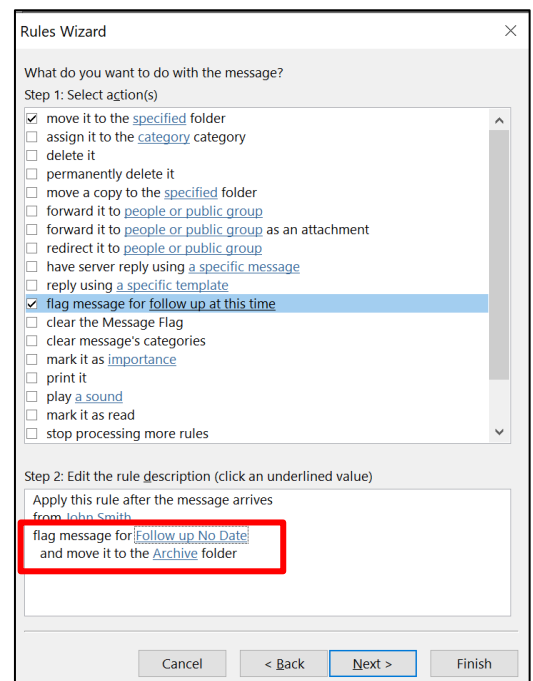


Now select "New Rule ..." and you are presented with some templates, but for this we will choose the first of the blank rules "Apply rule on messages I receive". Choose next and it will take you through a three-stage wizard.

The first stage is "Which condition do you want to check?" For this, choose the first option, where the email comes "from people or public group". Down in step 2, this becomes a hyperlink. When you click on this, it will open your address book and either find your own name from the contact list or type your own email address into the box at the bottom and choose OK.

Choose next and you are taken to the second stage – "What do you want to do with the message" when this condition is met. We will choose two actions - "move it to the specified folder" at the top. And about half-way down, "flag message for follow up at this time." These two items will need configured in step 2 at the bottom.

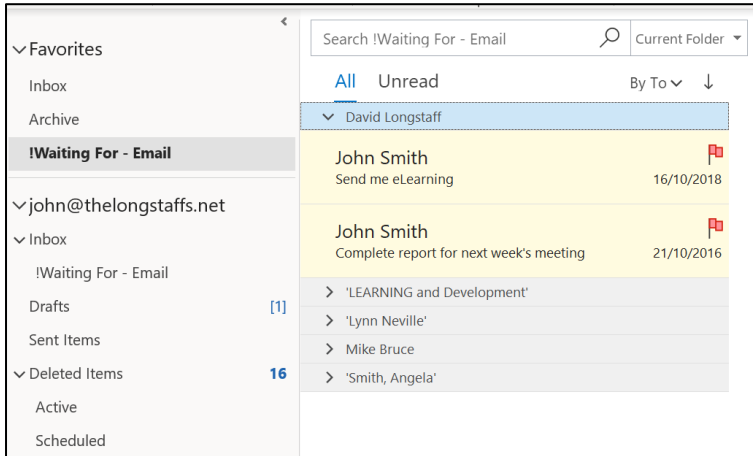
Choose the hyperlink move to specified folder. This will open your mailbox structure. If you already have a suitable folder to chase, follow up, waiting for or similar, choose that. If not, create a new folder (from the right hand side of the box) and call it something like "Waiting For - Email". Choose Ok until you get back to



your rule. We will also configure the flag message hyperlink and change the drop down from "Today" to "No Date". This will still let us see it on our To Do list in Outlook, but won't turn red.

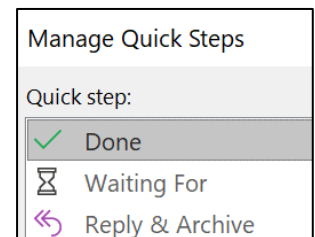
Choose next and the third stage lets you specify any exceptions. Select about half-way down the options, "except if words in the to or cc box". This will exclude anytime you email yourself and will only search the bcc field, missing out, for example, if you are emailing yourself a quick reminder of something you need to do.

That's about it. Choose "next" and this will let you type a name for the rule. It might warn you that this is a client only rule (in other words it will only run when Outlook is open). That's fine, choose "Apply" and "OK" and that's the rule set-up. So, to invoke the rule, anytime you want to track someone, just make sure you include yourself in the bcc, and this process will run automatically.



You will be able to see the message in the "Waiting For – Email" folder in your To-Do list in Outlook. Another benefit of doing it this way is that while email folders are usually sorted by date; if you right click on the header dropdown, you can sort this folder by the person you sent it the emails to.

This creates a nice "hit list" of all the things you are 'waiting for' from each person. And if you talking with them in a meeting or on a phone call, you can cover these additional topics; when it's agreed they've been done, you can select the "Done" Quick Step which takes the emails, marks the actions as being complete, and moves them to the Archive folder.



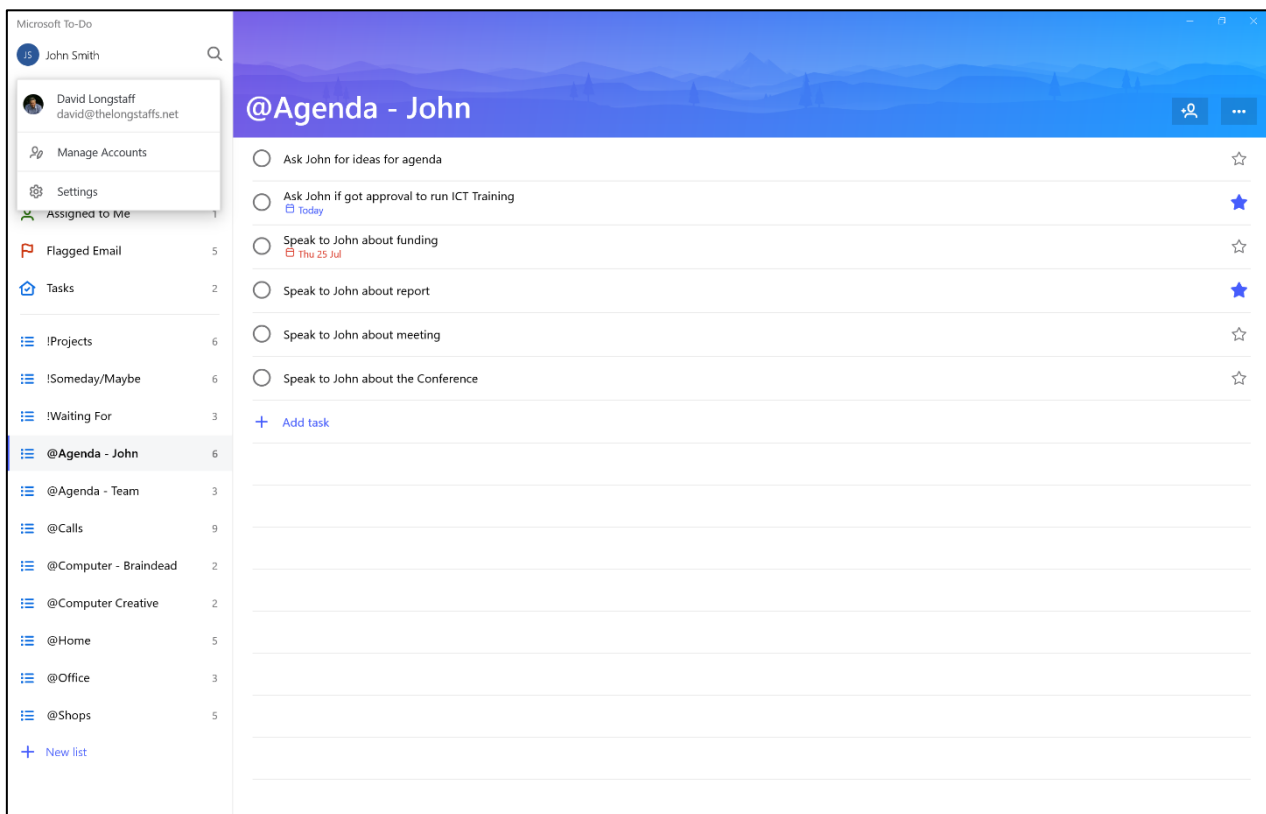
Of course, like Quick Steps, you can create many other rules that would help your workflow - it just needs a little thinking.

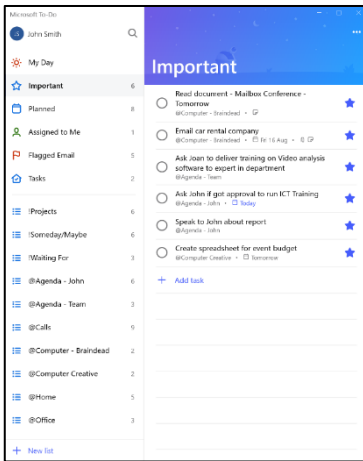
Going mobile - Microsoft To-Do with Outlook Tasks

The Outlook Tasks feature is fine if you spend all day at your desk. But supposing you're on the go, out of the office, even out of the country. While the standard Outlook mobile app has email, calendar and a few other features, Outlook Tasks aren't available. There is now a really powerful way to engage with Outlook Tasks on the go, if your organisation subscribes to Office 365, using [Microsoft To Do](#). This application has been developed by the same team that built a very popular task management solution - Wunderlist, which Microsoft acquired in 2015.

The same team developed this new tool, which since 2019 has been able to synchronise seamlessly with Outlook Tasks. As an aside you can also use it for personal life, home tasks, using a free Microsoft account and use multiple accounts on the same device.

Microsoft To-Do is available for free on all major platforms, iPhone, iPads, Android, Mac, Web and in fact also as a Windows Store app. Go to your app store and search for it. Having installed it, the app will ask you to login. If you want to use this with Outlook Tasks, use your organisation's username and password credentials. If you have already set-up tasks in Outlook as described in the earlier sections, you will now see all your tasks in each list. It has a nice, easy-to-use interface and synchronises in both directions - so adding or editing a task on the go on your mobile, will automatically update it on the corresponding list in Outlook and vice versa.



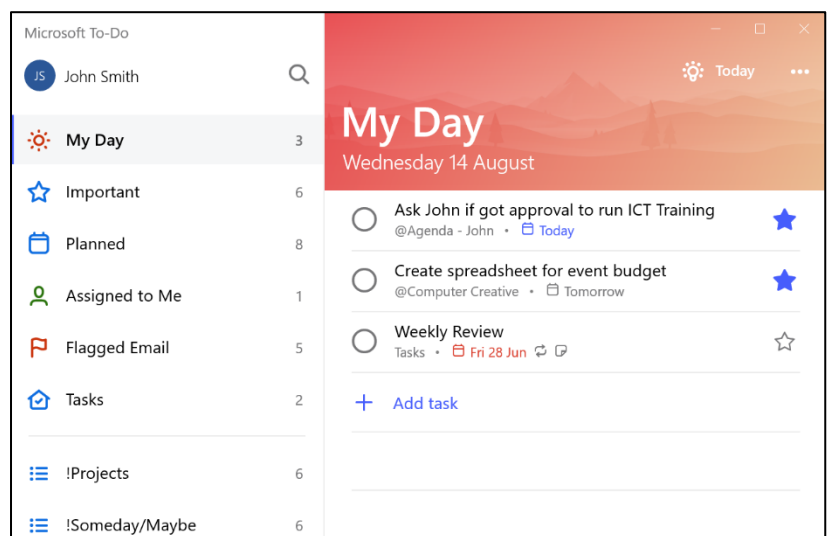


A few other features of note. If a task has been marked as having a high importance in Outlook, Microsoft To-Do pulls them all into an "Important" view, showing a consolidated view of all priority tasks. Be a little careful not to make all tasks high importance, otherwise this quickly loses its value.

Tasks that have specific dates, will also show on the "Planned" view in groupings of overdue, today, tomorrow and later. You can also share lists with other people which can be useful in teams.

Microsoft To-Do tasks also allow you to "Add steps" so that small projects can be handled effectively, though the "steps" won't then show in Outlook Tasks. In addition, Microsoft To-Do has the usual features of having due dates, reminders, repeating tasks and attaching supporting documents to tasks.

A final feature I like is the first menu option "My Day". This will let you either create tasks straight on this screen or add existing tasks you want to handle on that day. Once that day has gone passed, they will drop off this view, but still be in their specific list.



The key to making this work is at the start of each morning, decide on a very limited number of tasks that you want to complete before the end of the day. I recommend these should be strategic, perhaps things that will help you move towards your bigger plans. How many should that be?

I recommend three, as a starting point. Actually, it's very easy to get this up to ten or even more. The real win comes from working out only three. Which three things (if you did nothing else today) would make you feel your day has been really worthwhile?

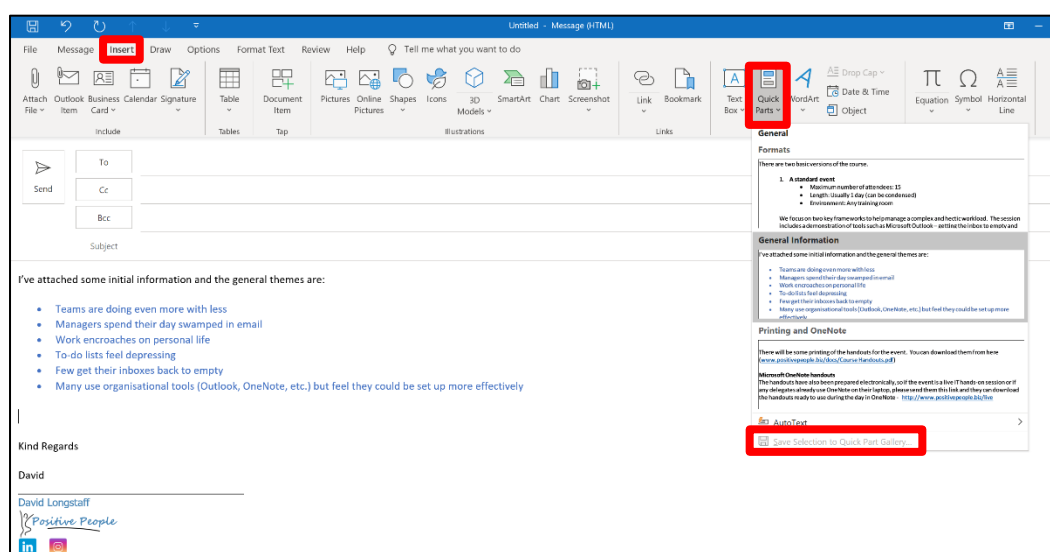
At the end of this section, why not stop think carefully and add them to the list?

Microsoft To Do is not a complicated app; it's fairly easy to use and helpful to work with Outlook Tasks even without having your main machine to hand.

Quick Parts

There's a nice feature in Outlook; slightly on a tangent to the workflow methodology delivered in my courses, but very useful and simple to set up, so I wanted to quickly demonstrate it.

If you regularly send the same chunks of text to people time and again, there are a few ways of handling it - some keep drafts around, others have a Word document. There's a nice way of handling it in Outlook using "Quick Parts". As an example, if anyone asks me to send some information about my course so they can advertise it across the team I can simply drop in the relevant section. If someone asks me "is there any printing to do for the course", I can drop in another section. If someone asks me about the two versions of the course (standard and live, hands-on version), I can quickly drop in yet another.



It is quick and can also include, formatting, bullet points, colours and even hyperlinks to documents.

Here's how to create one. As an option, go to your "Sent" items and find an email you

have sent out with some text you might typically reuse. Select the chunk of text and copy it to the clipboard. Now open a new email and paste it into the body of the message. Edit it to get the fonts and colours correct and drag your mouse over the text and choose the "Insert" tab. About three quarters of the way along is a button called "Quick Parts". From there choose "Save selection to Quick Part Gallery". It will now present you with a box where you can give it a meaningful name, and even create categories if you end up with a lot of them. Choose "OK" and close the email without saving it.

Now imagine this is three weeks down the line and you want to reuse that chunk of text. Simply reverse the process. Click on a New email (or reply to someone else's email), make sure you are in the body of the message and choose the "Insert" tab and "Quick Part" and you will find it there ready to drop in.

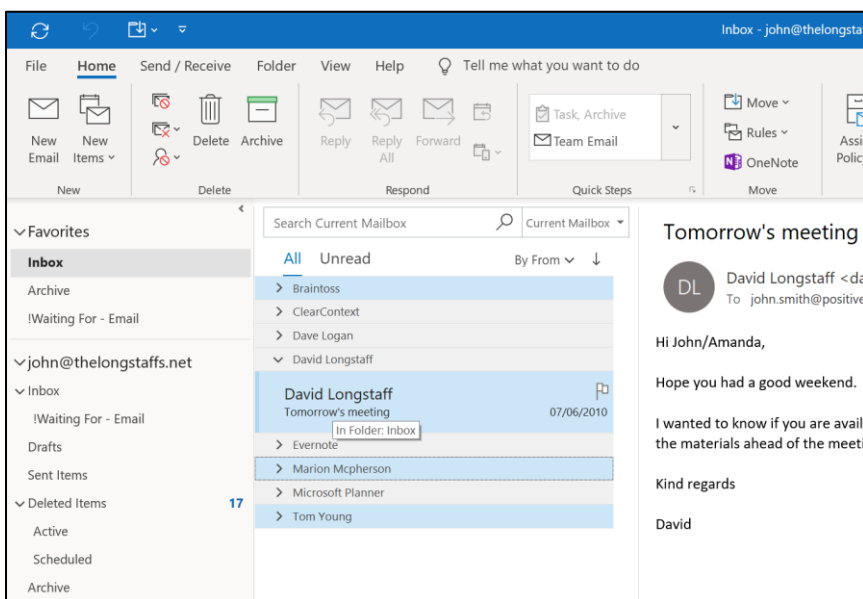
Yet another useful but underused productivity feature in Microsoft Outlook.

Getting a Fresh Start

At the start of a training seminar, I promise to show participants how to get the inbox back to empty and keep it there. Technically, I haven't yet done that in this series of sections, though it has been implied. So finally, how do you get a fresh start if you have many 1,000's of emails sitting in your inbox.

There are three quick stages.

Firstly, ensure your emails are sorted by date order (that's the default anyway) and decide on the shelf life of your email. In other words, if this email is older than ... three months, and I haven't dealt with it by now, let's be honest, I'm probably never going to do it (by the way, that cut off point is probably a lot shorter than you might imagine). Now click on the first email older than that and move your mouse wheel to the oldest email on the list and holding down the shift key, click on that bottom email. Everything is now selected in-between. Now drag the whole lot to an "Archive" folder. If you have many thousands of emails you might want to do this at the end of a day where you can leave the server to catch up when you've done it. Does that sound like a cheat? It is, but that's fine, it's giving an amnesty, without actually losing the emails if you ever need to go back to them.



The **second** stage is to sort your emails by "sender" which you can do from the dropdown in the list header. Now, while holding the "Ctrl" key go through selecting with your mouse, chunks of emails based on the sender - people who don't send you actionable emails, newsletters, IT reminder emails and so on. Now drag these to the "Archive" folder as well.

Finally, sort them back to date order. The rest ... You'll now have to process these as was described in the earlier section ([Making Emails into Tasks](#)). But in the first stage, we quickly went from 50,000 down to 2,000. In stage two, we went from 2,000 down to 150. And that feels much more manageable.

So, in wrapping up, hopefully this document will have helped you set up your system to create a workload solution that matches our training course methodology. Finally, if you want hands-on support or feel a live session would be useful for you or your colleagues, please [contact us from the website](#). We're always keen to work further with organisations.