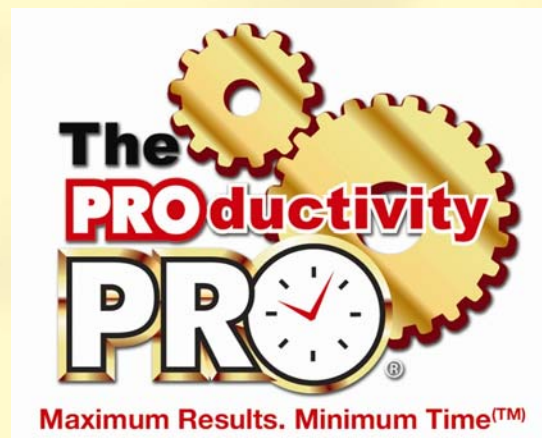


How to Set Up TASKS in Microsoft Outlook 2003

Presented by
Laura Stack, MBA, CSP

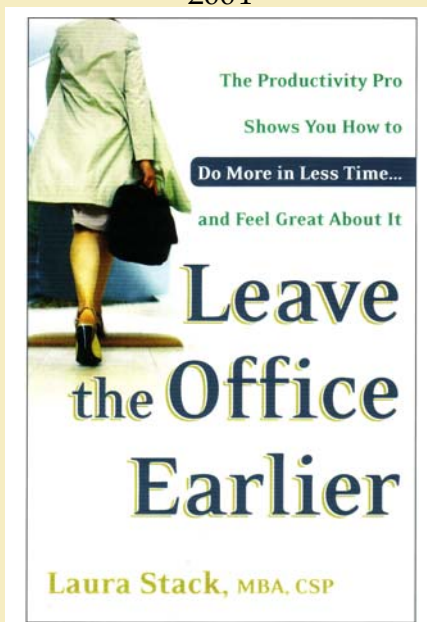


9948 S. Cottoncreek Drive, Highlands Ranch, CO 80130

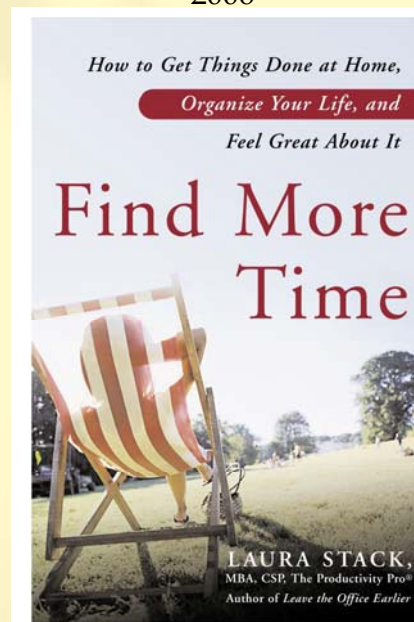
Phone: 303-471-7401, Fax: 303-471-7402

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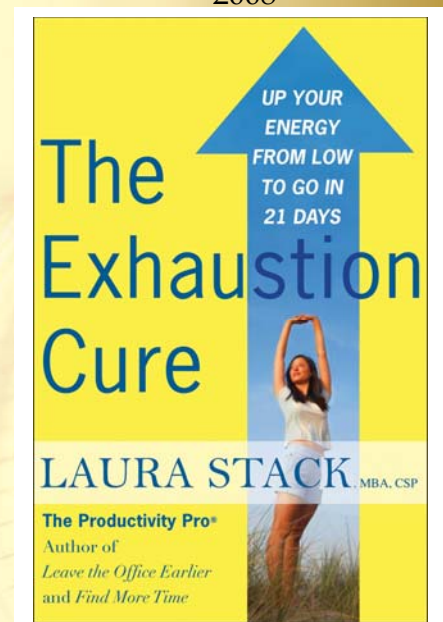
2004



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.

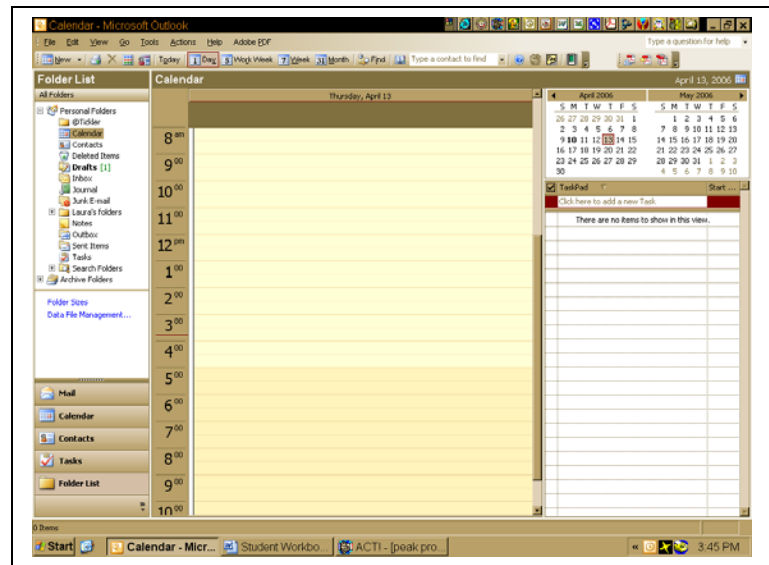


Setting Up Tasks

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.

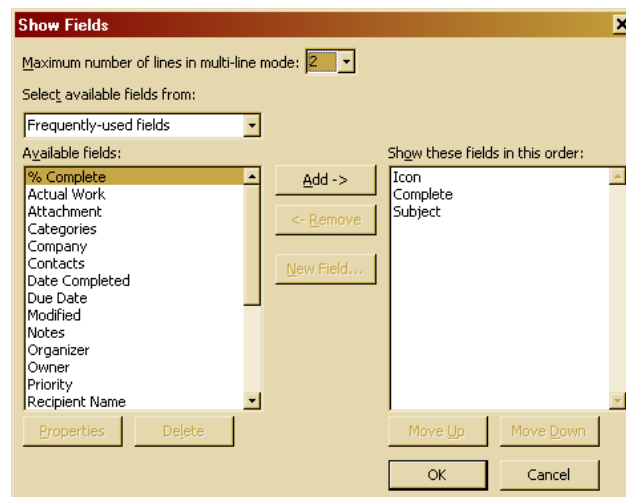
A. Filter The View In Your Calendar To Display The TaskPad (To-Do List).

1. Go to the Calendar. Make sure your Task Pad is showing on the right. If it's not, go to the **View** menu and select **Task Pad**.
2. Go to the **View** menu again and click **Task Pad View**.
3. Select **Active Tasks for Selected Days**. The task pad will now only display tasks with a Start Date of today or earlier.



B. Filter the View on the Task Pad

1. Right-click in the TaskPad.
2. Select **Task Pad Settings**, then **Show Fields**.
3. Add and remove fields until only **Icon**, **Complete**, and **Subject** are showing (in that order).

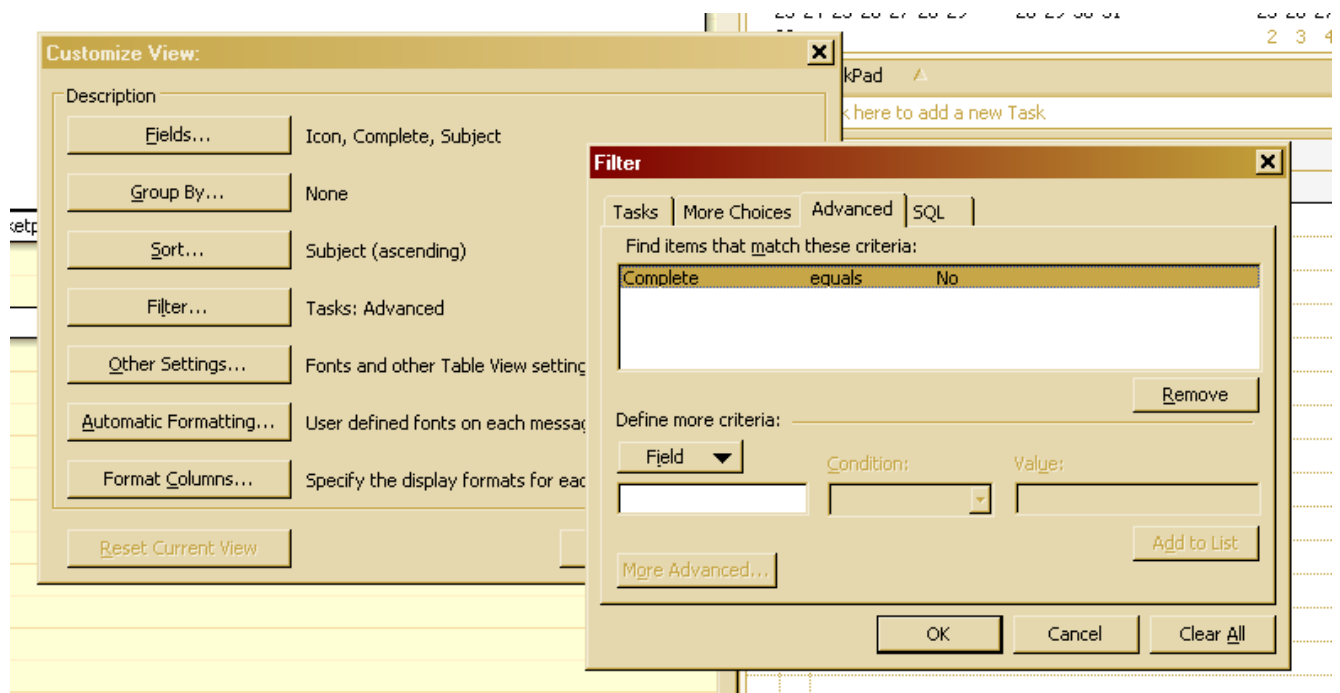


C. Remove Completed Tasks From the Task Pad.

1. Right click on the word TaskPad in the Task Pad (make sure you click the header, not inside the task pad).



2. Select Customize Current View.
3. In the Customize View: dialog box, click on the Filter button.
4. Click the Advanced tab.
5. Click on the Field button on the left side in the middle of the box.
6. Click Frequently-used fields.
7. Click Complete. The default Condition and Value will automatically be filled in with Complete, Equals, and No, which you want to keep.
8. Click the Add to List button.
9. Click OK to return to the View Summary Box.



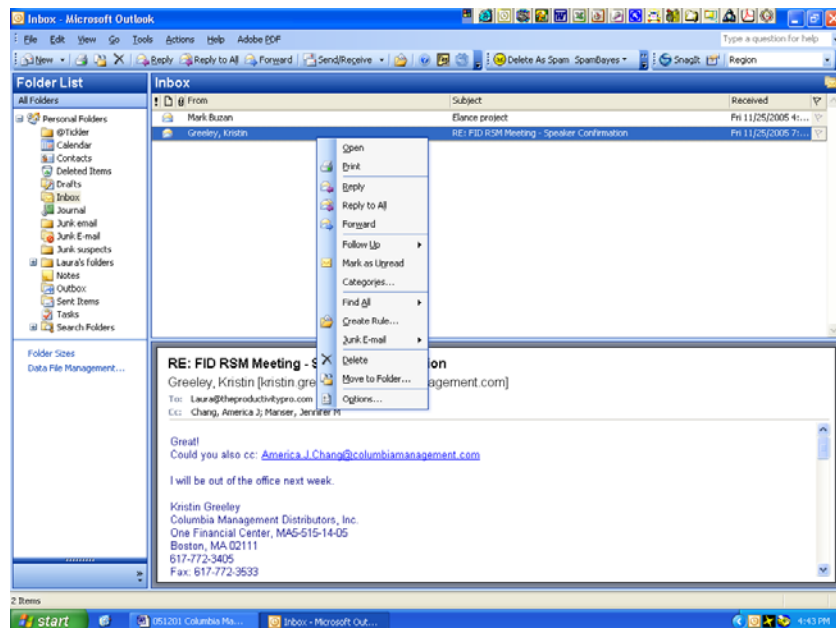
10. Click OK again.

D. Create a New Task.

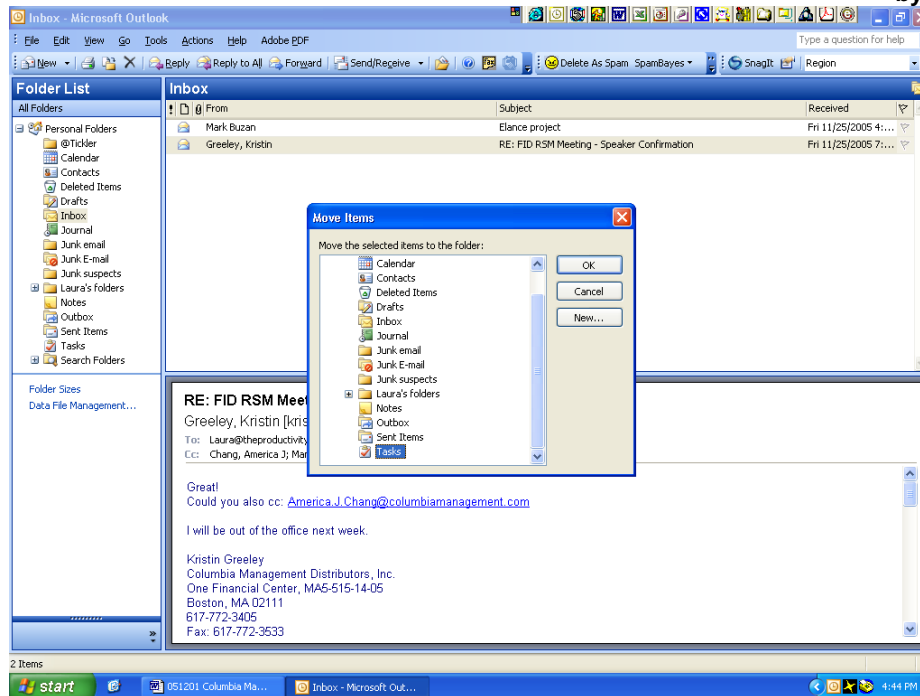
1. On the **File** menu, point to **New**, and then click **Task**.
2. In the **Subject** box, type a task name.
3. Fill in the **Start Date** for the date you want the task to show up on your TaskPad.
4. Fill in the **Due Date** as applicable or different.
5. If you leave the Start Date and Due Date blank, it will still be in your Tasks list as a master task list 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.

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

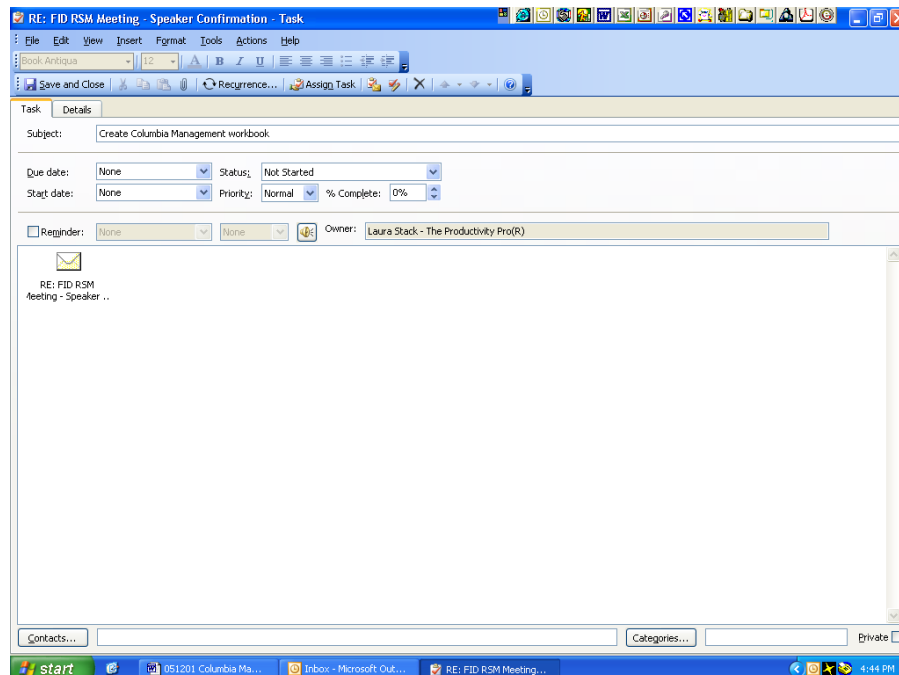
1. Right mouse click the email (or if you're viewing the email, select File).
2. Select "Move to Folder" from the short cut menu (or File menu).



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



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.





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>

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.

Phone Calls section tracks and records phone activity

Errands section helps you keep track of those "must do" tasks

To-Do List records activities

Capture and coordinate commitments on the monthly tabs. Track meetings, appointments, and obligations that must occur at specific times. Then, use the self-stick dots to code priority.

2-Page-Per-Day

3 3/4" x 6 3/4" Page Size

2-Page-Per-Month

Laura Stack
The Productivity Pro®



Maximum Results. Minimum Time™
TheProductivityPro.com

Note Pages



A-Z/Filing Tabs



2-Page-Per-Month

Dots (4 sheets)



E4712

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."

DAY-TIMER®

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