6 Ways to Streamline Your Tasks in Outlook

By S.E. Slack

Every job requires a variety of tasks during a given day. Maybe yours includes meeting with clients, preparing a presentation, or collaborating with team members on an important project. No matter what you are doing, staying on top of all the tasks you need to perform is crucial. By organising them effectively, you can plan ahead for tomorrow and improve your productivity at the same time.

At the most basic level, the Tasks features of Microsoft Outlook (http://office.microsoft.com/en-us/microsoft-outlook-2010-e-mail-and-calendar-software-FX101825654.aspx) help you create lists of task-related items. But dig a little deeper and you will find they do much more for you than simply holding your to-do list. Following these six tips for using Outlook Tasks features will help you stay better organised and keep you steps ahead of your deadlines.

1. Customise your view
In Outlook Tasks, you can find your tasks and view their status at a glance. Choosing the appropriate view saves time. For example, you can prioritise the items that are most critical on your list without scrolling through all the other tasks that are still marked as incomplete. Or if you prefer to tackle the task that needs to be completed first or sort your tasks by project or client name, the options in Tasks can help you organise your tasks the way that works best for you and the project at hand.

To find the task view that works best for you, in Outlook 2010, in the Navigation pane, on the left side of the window, click **Tasks**. On the Ribbon, click the **View** tab, and then, in the **Current View** group, click **Change View**.

For a basic view of your tasks and main details, click **Simple List**. In this view, you see columns for Task Subject, Due Date, Categories, In Folder, and Sort by: Flag Status.
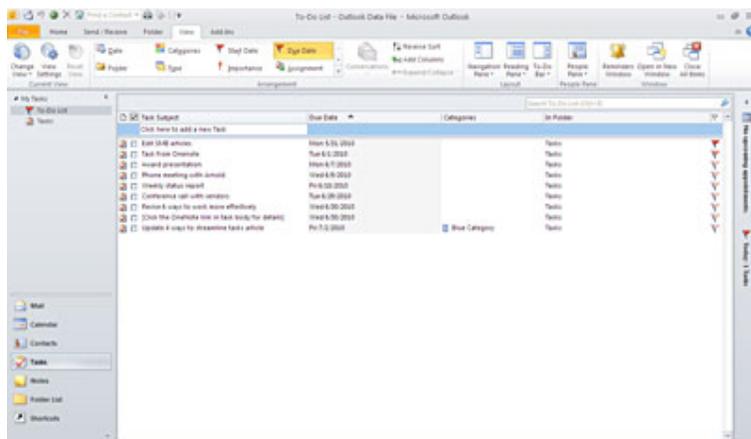
*Simple List view Outlook 2010 gives you a list of basic tasks and details.*

For a view of your tasks that shows more details, click the **View** tab, click **Change View**, and then click **Detailed**. Additional columns appear, including Status, Due Date, % Complete, and more.

In addition to changing the view, you can easily sort your task list in various ways. Here's how:

On the **View** tab, in the **Arrangement** group, click the sorting method you want to use: Start Date, Due Date, Categories, Type, Importance, Assignment Folder, and Modified Date. When you click the method you want to use, your list of task items is automatically reorganised. Try different options until you find one that works best for your tasks.

You can further customise any of the views to suit your needs exactly. For example, open your task list in Detailed view, as described earlier in this article. In the **Current View** group, click **View Settings**. The **Advanced View Settings: Detailed** dialogue box appears.
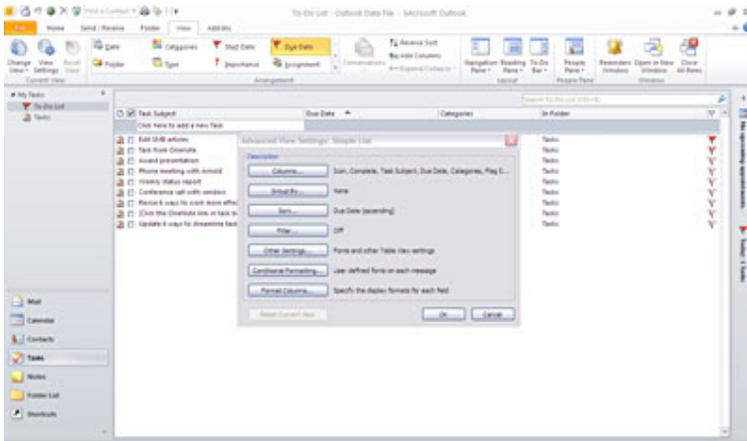
*The **Advanced View Settings** dialogue box gives you more choices for modifying the Tasks view*

The **Advanced View Settings** dialogue box is available for each view. You can use it to add or remove categories, set filtering parameters, and even adjust type size and font.

To reset a Tasks view that you've customised back to its original settings, click the **View** tab, click **Reset View**, and then, when the dialogue box asks you if you're sure you want to reset the view, click **Yes**.

Experiment with different options. If you don't like the way your tasks appear, you can always reset the view to the default settings or choose a new one. The trick is to decide which view helps you streamline your tasks so that you aren't digging for information. Create unique views that provide the information you need. This is your chance to personalise Outlook to meet your goals.

Outlook 2007 users: The processes for changing or customising your tasks views vary slightly. To find out more about customising views in Outlook 2007, go to Create, Change, or Customise a View (http://office.microsoft.com/en-us/outlook-help/create-change-or-customize-a-view-HA010120901.aspx?pid=CH100777471033).

2. Work with the To-Do Bar
Another handy Outlook feature is the To-Do Bar. You can set it up to display your calendar, appointment reminders, and list of tasks – even when you're not using the Tasks features in Outlook. Here's how:

1. While in Mail, Calendar, Contacts or Tasks, click the **View** tab, and then, in the **Layout** group, click **To-Do Bar** to open a drop-down menu.

2. If **Normal** is not already selected, click **Normal** to display the To-Do Bar on the right side of the window.

3. To further customise what appears in the **To-Do Bar**, click **To-Do Bar** again to open the drop-down menu. Select one or more of the following options:

   - Click **Date Navigator** to see a calendar page in the To-Do Bar.
   - Click **Appointments** to see upcoming appointment in the To-Do Bar.
   - Click **Task List** to see your list of tasks in the To-Do Bar.
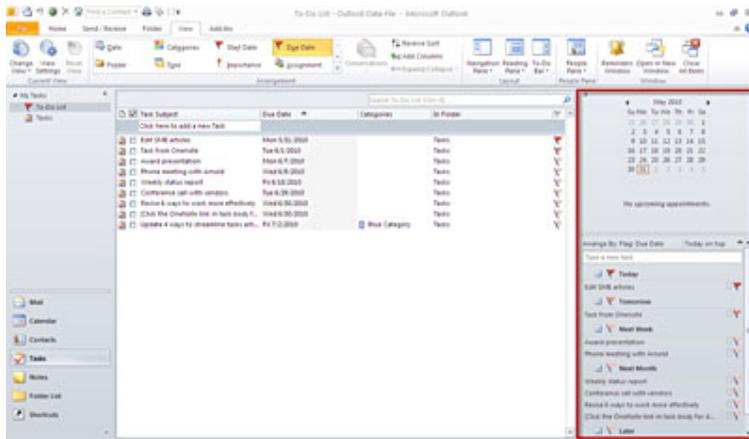
You can customise the To-Do Bar in Outlook 2010 to suit your needs.

If you selected Date Navigator, Appointments, and Task List, the To-Do Bar displays a calendar view, upcoming appointments, and your task list. The To-Do Bar remains visible even as you switch between Mail, Calendar, Contacts, Tasks, or Notes in Outlook.

To turn off or minimise the To-Do Bar, simply click **To-Do Bar** to open the drop-down menu, and then click **Minimised** or **Off**.

3. Detail your time, billing, or mileage

It's not easy to remember the date you drove to an appointment with a client or how much time you spent completing a task in the office. Some people try to remember to bill the time or mileage later. Often, that means holding a jumble of details in your head, or trying to decipher multiple sticky notes or scraps of paper.

However, you can eliminate that hassle by storing all that information in a task. Then, when you need to bill the client, you can easily retrieve the details from your task.

Add details to a task

1. Do one of the following:

   **Outlook 2010**

   Outlook 2007 and Outlook 2003

2. Next, do one of the following:

3. Type the desired details:

   a. **Total work** – Enter the total number of hours you have spent for a given client. When you invoice the client, it will be easy to do a search by client and tasks and tally the number of hours.

   b. **Actual work** – Type the actual number of hours spent on the task.

   c. **Company (or Companies)** – Type the company involved. Sometimes a task will not specifically name the client, so this information is key to helping you track which tasks were performed for each client.

   d. **Mileage** – Type the relevant date, mileage, and purpose of the trip.

   e. **Billing information** – Type the billing information related to the specific task. Perhaps you charged this task at the full rate, but if not, this is a good place to remind yourself of the rate charge. You can add a note to yourself about why the full rate was not charged, for example.

4. Do one of the following:

In Outlook 2010, on the **Task** tab click **Save & Close**.

In Outlook 2007, in the **Actions** group, click **Save & Close**.

In Outlook 2003, click **Save and Close**.
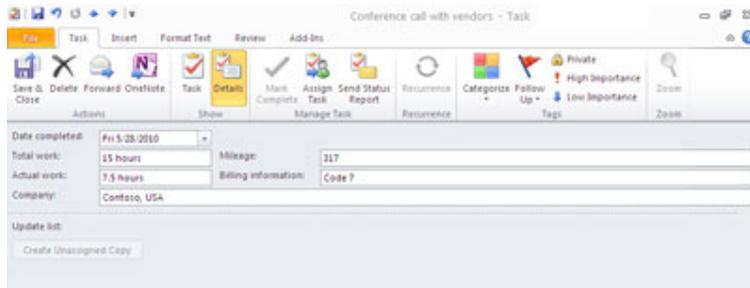
At the end of each billing period, you can easily sort through the information, organised by client, and add up the details quickly.
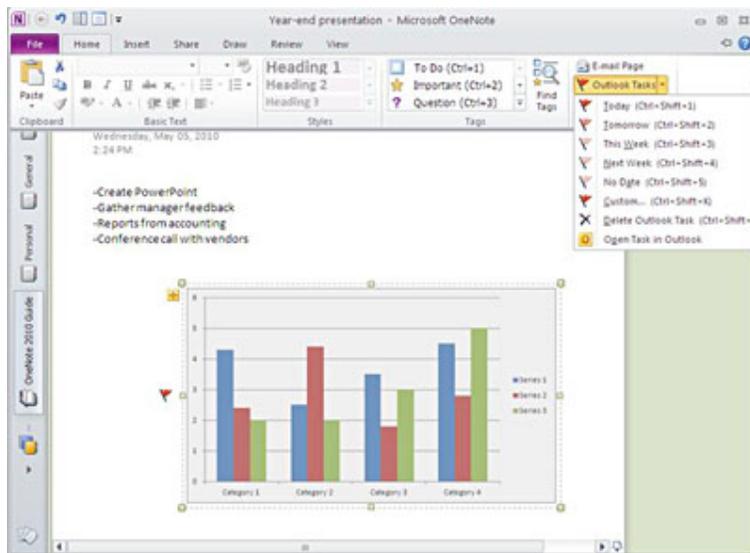
4. Create Outlook tasks from OneNote

If you use Microsoft OneNote (http://office.microsoft.com/en-us/microsoft-onenote-2010-planner-and-note-taking-software-FX101825650.aspx), you already know how it gives you one convenient place to keep meeting notes, make sketches, capture text, save images, and more—in one easily accessible place. And OneNote integrates seamlessly with Outlook Tasks to give you some quick shortcuts to save you time and increase your productivity. It just takes a couple of clicks, for example, to create an Outlook task from within OneNote—and keep that task synced automatically between the two programs.

Note: If your installation of Outlook is configured for multiple e-mail profiles, you must first start Outlook before you can successfully create and save Outlook tasks in OneNote. To check the e-mail profiles on your computer, in Control Panel, in category view, click **User Accounts**, and then click **Mail**. If you are using Control Panel classic view, double-click the **Mail** icon.

OneNote 2010

In Microsoft OneNote, create a page with notes, drawings, or any information you want to include in your task. On the Ribbon, click the **Home** tab, and then click the red flag icon in the **Outlook** group. The task appears in your Outlook Tasks list when you open or return to Outlook.

By default, the due date for the task you created in OneNote is Today. To set a different due date, click the **Home** tab, click **Outlook Tasks** in the **Outlook** group to display the dropdown menu, and then click another due date.

It's easy to create a new task in OneNote 2010 to send to Outlook Tasks.

OneNote 2007

OneNote 2003

http://office.microsoft.com/en-us/onenote-help/service-pack-features-in-onenote-2003-HA001136867.aspx)**5. Create and track assigned tasks**

When you collaborate on a team or manage the work of others, you may want to delegate a task to someone else and keep track of its progress. Outlook makes it nice and easy to create and track a task that you assign. Here's how:

1. To create a new task, on the **Home** tab, in the **New** section, select **New Items**, select **Tasks**, and in the **Manage Task** section, select **Assign Task**. To assign an existing task, in the task list, open the task you want to assign, and click **Assign Task**.

2. In the **To** box, enter the name or e-mail address of the person you want to assign the task to. To select the name from a list, click the **To** button.

3. For a new task, in the **Subject** box, type a task name. (In an existing task, the **Subject** box is already filled in.)

4. Select the due date and status options you want.

5. Select or clear the **Keep an updated copy of this task on my task list** check box and the **Send me a status report when this task is complete** check box.
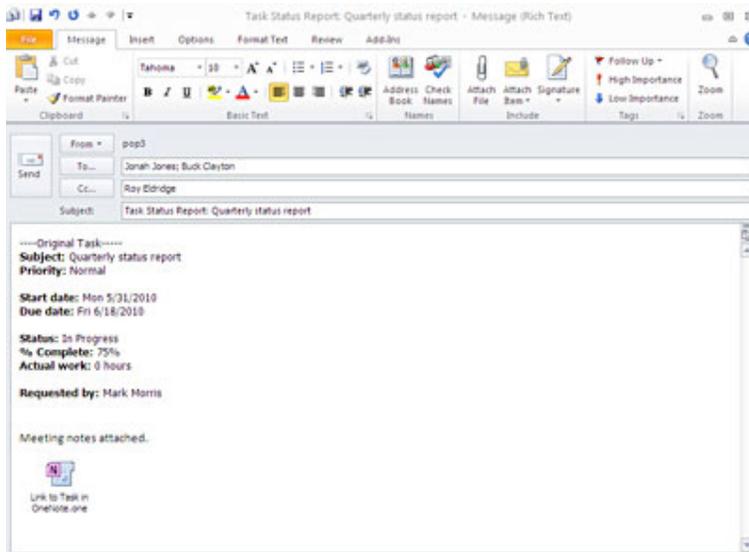
Outlook 2010 makes it easy to create, assign, and track tasks.

Note: If you select the **Send me a status report when this task is complete** check box, you will receive a status report for each completed occurrence of the task

6. If you want the task to recur:

   - If you're using Outlook 2010, click **Recurrence**.

   - If you're using Outlook 2007, click the **Options** group, and then click **Recurrence**.

   - If you're using Outlook 2003, click the **Actions** menu, and then click **Recurrence**.

Select the options you want, and then click **OK**.

Note: If you assign a recurring task, a copy of the task remains in your task list, but it won't be updated.

7. In the body of the task, type instructions or information about the task.

8. Click **Send** .

Learn more about creating and tracking assigned tasks (http://office.microsoft.com/en-us/outlook-help/create-and-track-assigned-tasks-HA001229368.aspx).

6. Send status reports for tasks from Outlook

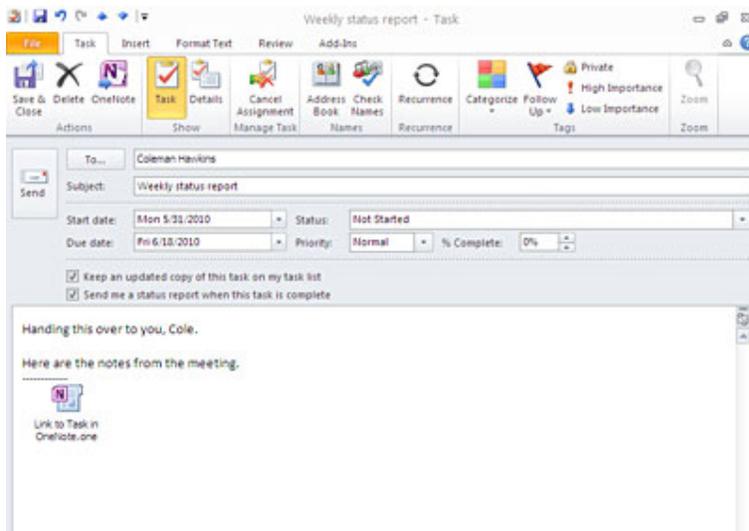If you ever have a client or task that is of utmost importance to your boss, this tip will become a

favourite. In Outlook, you can send a periodic status report. It's a great way to communicate that you're managing things efficiently and remind your boss how well organised you are.

The report is automatically generated from Outlook to an e-mail message that you send.

Here's how to do it:

1. In Outlook, open the task for which you want to send a status report.

2. Do one of the following:

   - In Outlook 2010 and in Outlook 2007, on the **Task** tab, in the **Manage Task** group, click **Send Status Report**.

   - In Outlook 2003, on the **Actions** menu, click **Send Status Report**. Outlook opens an e-mail window with your task status automatically added at the bottom of the message window.

3. Enter recipient names in the **To**, **Cc**, and **Bcc** boxes. If the task was assigned to you, the names of people on the update list are automatically added.

4. Add any other information you want in the e-mail message.

5. Click **Send**.

Now you have a status report ready to send.

Source: http://www.microsoft.com/atwork/productivity/streamline.aspx#fbid=O2KcslwAcgM