

EASE THE LOAD

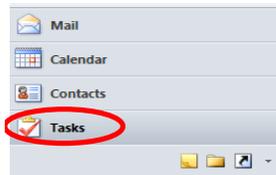
Electronic Task Management Systems

MICROSOFT OUTLOOK

Quick Guide (2003, 2007, 2010)

To determine which version of MS Outlook you are running, select “Help” then “About” or “File” then “Help”.

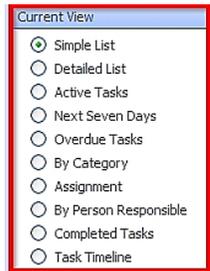
Navigating to Microsoft Outlook Tasks



In **all** versions, from the left hand menu choose the “Tasks” option.

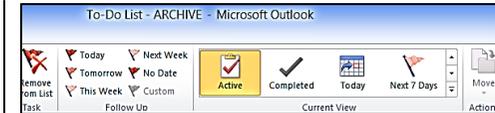
This will take you to an area to add, edit and delete tasks and categorise them to match the Ease the Load approach.

Selecting the correct view

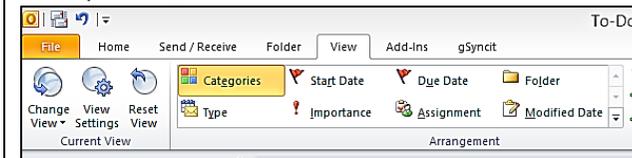


In **2003** or **2007**, from the left hand panel, select the view you desire. This is likely to be “By Category” if you are following the course approach.

However, you can also select “Completed Tasks,” “Overdue Tasks” and other views.



In **2010**, from the top “Home” menu, select “Current View”, then select “Active” to view your current active tasks. You can also view “Completed”, “Overdue” and other views.



Then from the “View” menu, select “Arrangement”, then “Categories”. You can arrange the task list by other columns at any stage.

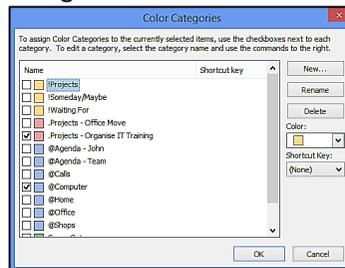
Setting up the Categories



In **2003**, create a new task (Ctrl + Shft + K), and from the bottom right of the screen, select “Categories”, then choose the “Master Category List...”

From here you can add, edit and delete categories.

In **2007** and **2010**, look for the multi-coloured square called “Categorize” and select the “All Categories”.

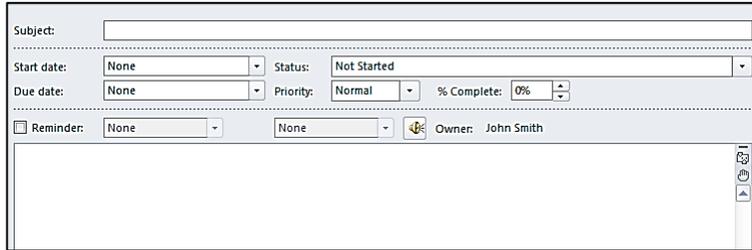


From this box, you can create new categories and assign them colours to match your personalised categories in Ease the Load.

Special Categories: Projects, Someday/Maybe, Waiting For.

Contexts: Agenda, Calls, Computer, Home, Office, Shops, etc.

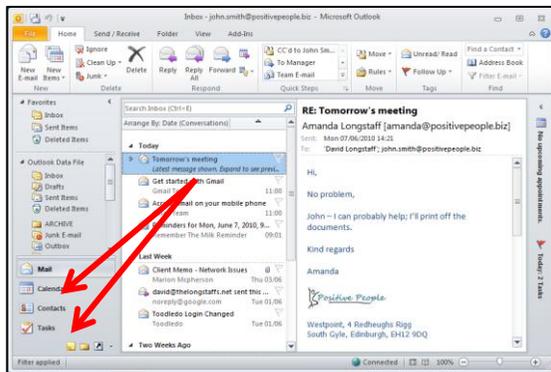
Creating a New Task



In **all** versions, to create a new task, select “New” then “Task” (Ctrl+Shft+K). You will then be presented with a new task form where you can input the subject, start date, due date, reminder and priority.

Then to assign a category, (**2007, 2010**) select the multi-coloured “Categorize” square or (**2003**) choose the “Categorise” button and choose the categories – see “Setting Up the Categories”.

Creating Tasks and Appointments from an e-mail



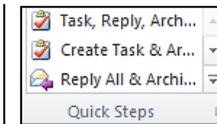
In **all** versions, select an e-mail and drag it over the “Task” or “Calendar” bars on the left hand menu.

Release the mouse and Microsoft Outlook will automatically open a new task or appointment. The subject of the e-mail pre-populating the subject of the new item (the subject can be adjusted).

The body of the e-mail will also be carried across to the body of the new item along with any attachments that were in the email.

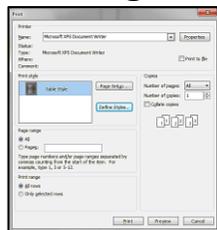
The task or appointment can now be edited if required and assigned a category. The email is no longer required and can be deleted or archived.

Quick Steps (2010 onwards)



In **2010**, you can now create quick steps to automate many of the processes in Outlook.

Printing



A number of print options are built into Microsoft Outlook to provide an on-the-go version of your data.

With your desired view and appropriate Categories expanded and collapsed, select File, Print and you will be presented with the available options which include layout, paper size, format, etc.