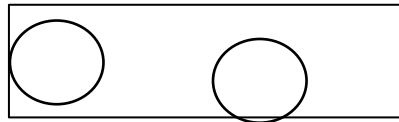
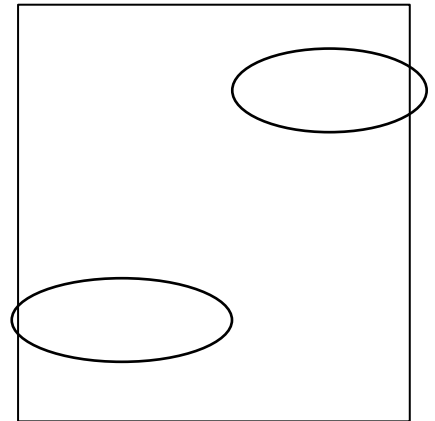


Click on Sort
 Choose Subject under Sort Items By
 Ensure Ascending is selected to the right
 Click OK once to return to the View Settings



Click on Other Settings
 Select Automatic Column Sizing, Allow in-cell editing and Show "new item" row
 Uncheck the box to the left of Use Compact Layout... so that Always use single-line layout is selected
 Click OK once to return to the View Settings
 Click OK again to exit View Settings

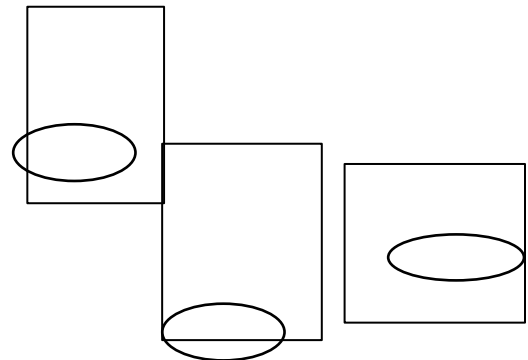


Chapter 6: Changing the default due date

Go to your To-Do List in Outlook by clicking on the task icon or the word Tasks (see chapter 4 for specifics)

Right-Click on the Categories: (None) Category

Select Follow Up from the menu
 Select Set Quick Click from the next menu
 Select No Date from the dropdown list
 Click OK



Chapter 7: Adding Categories

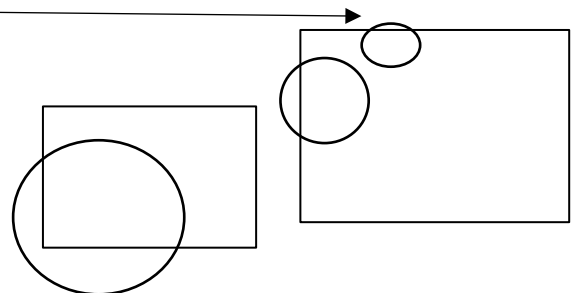
Go to your To-Do List in Outlook by clicking on the task icon or the word Tasks (See Chapter 4: Setting up the To-Do List to view Categories: (None) for the graphics if needed.)

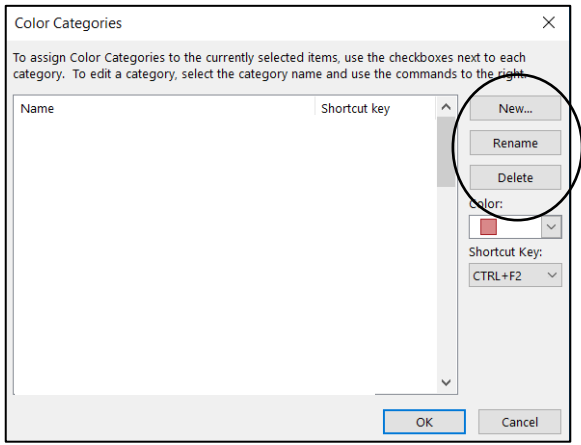
Select Home from the tabs at the top of your window

Choose the New Task icon on the ribbon

Click on Categorize on the Untitled Task ribbon

Select All Categories from the dropdown list





Click **New...** to add the recommended categories
 Click **Rename** to change existing categories
 Click **Delete** to eliminate existing categories

Chapter 8: Categorizing your Task as a .Meaningful Objective

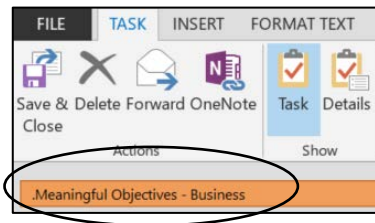
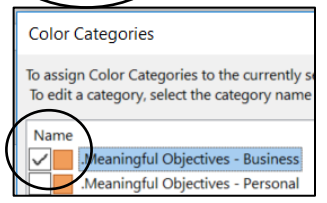
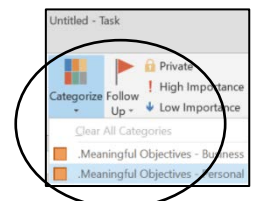
Open the Task you want to categorize
 Click on **Categorize** on the ribbon

Select the **.Meaningful Objectives – Business** or **.Meaningful Objectives - Personal** category from the dropdown list

Or if the category isn't in the list,

Select **All Categories** from the dropdown list and click the box to the left of the **.Meaningful Objectives – Business** or **.Meaningful Objectives - Personal** category and Click OK.

Click **Save and close** to see the Task appear in the category in your To-Do List



Chapter 9: Categorizing your Task

(See Chapter 8: Categorizing your Task as a .Meaningful Objective for the graphics if needed.)

Open the Task you want to categorize
 Click on **Categorize** on the ribbon

Select the category from the dropdown list

Or if the category isn't in the list,

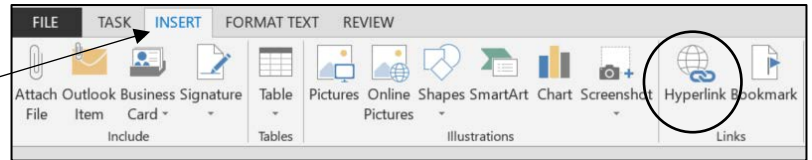
Select **All Categories** from the dropdown list and click the box to the left of the category

Save and close the task to see it appear in the category



Chapter 9: Inserting a Hyperlink

Open the Task for which you want a Hyperlink attached
Select **Insert** from the tabs at the top of your Task
Choose the **Hyperlink** icon on the ribbon

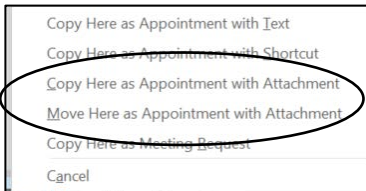


Chapter 9: Copying or Moving a Task directly to the Calendar

Select the Task that you want to attach to a Calendar Appointment
Right-click and drag the task to the **Tasks** Navigation button - depending on your settings it will either be a clipboard icon or the word Tasks.
When you release your right-click you will get these options: (if you didn't get these choices, try again and be sure to RIGHT-CLICK while you drag.)



We recommend you choose either:



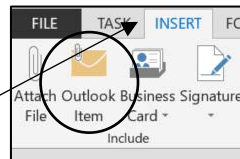
Copy Here as Appointment with Attachment - this will leave one copy of the task in the Task List and attaches another copy in the body of an appointment.

Move Here as Appointment with Attachment - this deletes the task from the Task List and attaches the Task to the body of an appointment.

Using **Appointment with Attachment** will ensure that the Task will be attached - including any text, hyperlinks or emails that you included in the body of the Task

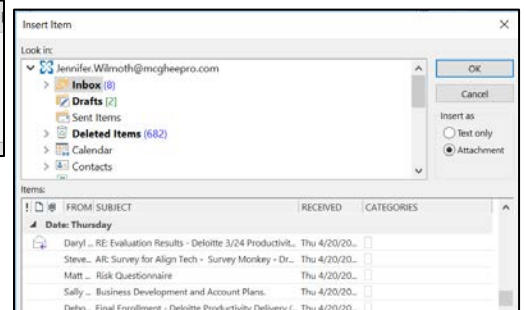
Chapter 9: Attaching emails to a Task

Open the Task for which you want to attach an email
Select **Insert** from the tabs at the top of your Task
Choose the **Outlook Item** icon on the ribbon



This defaults to your Inbox Folder (you can select a different folder)

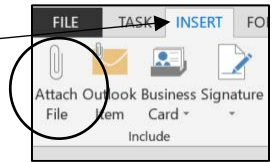
Select the **email** you want and click OK and it will attach that email into the body of your Task





Chapter 9: Attaching documents to a Task

Open the Task for which you want to attach attached

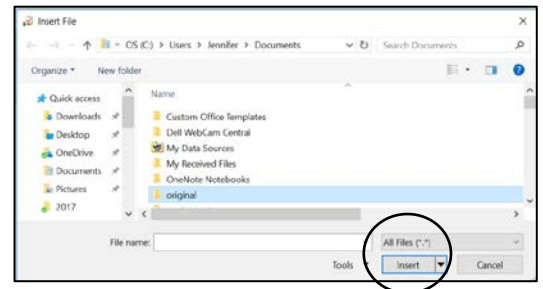


Select **Insert** from the tabs at the top of your Task

Choose the **Attach File** icon on the ribbon

This opens your Folder List (you can select any folder)

Select the **document** you want and click Insert and it will attach that file into the body of your Task (Note: this inserts the actual document, not a hyperlink. See instructions above to insert a Hyperlink)



Chapter 10: Viewing Contacts by categories

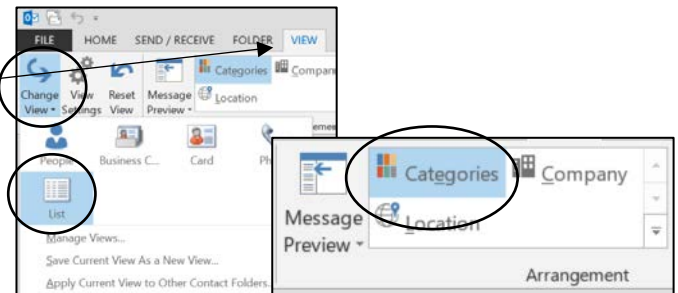
Go to Contacts

Select **View** from the tabs at the top of your Task

Choose the **Change View** icon on the ribbon

Select **List** from the dropdown

Select **Categories** icon on the ribbon



Chapter 11: Attaching Files or Outlook Items to an email message

Open the email

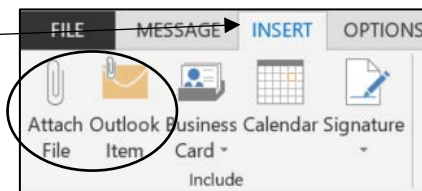
Select **Insert** from the tabs at the top of your email

Choose the **Attach File** or **Outlook item** on the ribbon

Select the file and click Insert

Or

Select the item and click OK



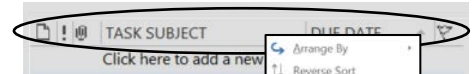


Chapter 11: Setting up the To-Do Bar

Go to the Calendar view with the To-Do Bar to the right (See chapter 2: Setting up the ControlPanel if you do not see your To-Do Bar to the right of the Calendar)

Right-click on the To-Do Bar headings (Note: they may look just like these)

Choose **View Settings** from the menu

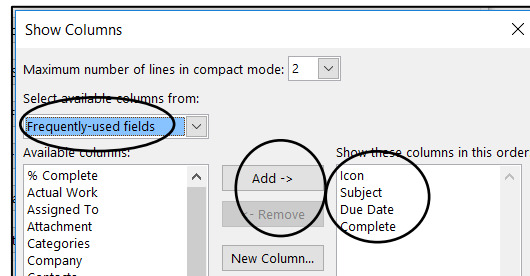


Click on **Columns**

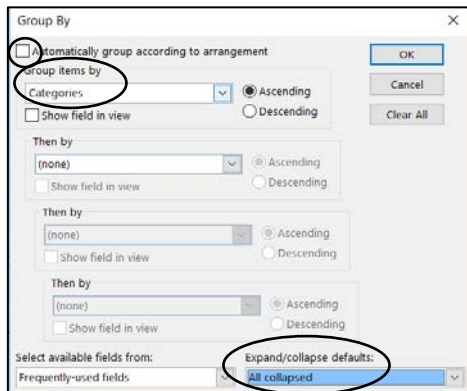
Choose **Frequently Used Fields** under **Select available Columns From**

Add & Remove until you have the four fields in this order:

Icon
Subject
Due Date
Complete



Click **OK** once to return to the View Settings



Click on **Group By**

Uncheck the box to the left of **Automatically group according to arrangement** if it is checked

Choose **Categories** under **Group Items By**

Ensure **Ascending** is selected to the right of Categories

Choose **All Collapsed** under **Expand/Collapse defaults**

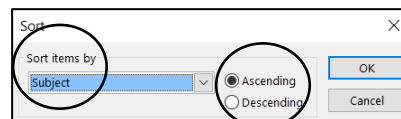
Click **OK** once to return to the View Settings

Click on **Sort**

Choose **Subject** under **Sort Items By**

Ensure **Ascending** is selected to the right

Click **OK** once to return to the View Setting





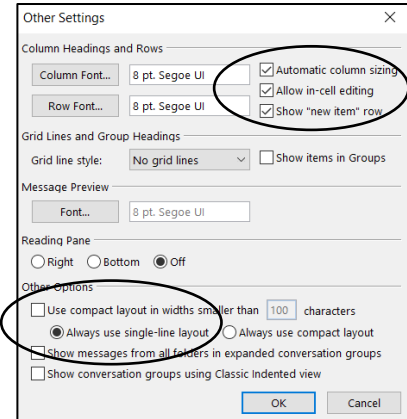
Click on **Other Settings**

Select **Automatic Column Sizing**, **Allow in-cell editing** and **Show "new item" row**

Uncheck the box to the left of **Use Compact Layout in widths smaller than...** so that **Always use single-line layout** is selected

Click **OK** once to return to the View Settings

Click **OK** again to exit View Settings

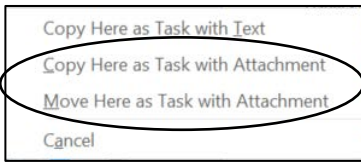


Chapter 11: Dragging an email to the To-Do Bar

Select the email that you want to copy or move to a Task

Right-click and drag the email to the **Mail** Navigation button - depending on your settings it will either be an envelope icon or the word Mail.

When you release your right-click you will get these options: (if you didn't get these choices, try again and be sure to RIGHT-CLICK while you drag.)



We recommend you choose either:

Copy Here as Task with Attachment - this will leave one copy of the email in the inbox and attaches another copy in the body of a Task.

Move Here as Task with Attachment - this deletes the email from the inbox and attaches the email to the body of a Task.

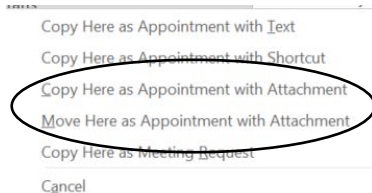
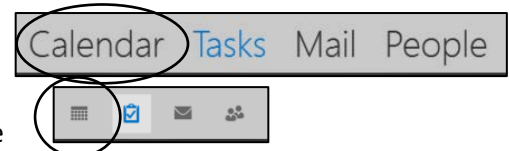
Using **Task with Attachment** will ensure that the email will be attached - including any attachments to the email

Chapter 11: Dragging an email to the Calendar

Select the email that you want to copy or move to a calendar appointment

Right-click and drag the email to the **Calendar** Navigation button - depending on your settings it will either be an calendar icon or the word Calendar.

When you release your right-click you will get these options: (if you didn't get these choices, try again and be sure to RIGHT-CLICK while you drag.)



We recommend you choose either:

Copy Here as Appointment with Attachment - this will leave one copy of the email in the inbox and attaches another copy in the body of an appointment.

Move Here as Appointment with Attachment - this deletes the email from the inbox and attaches the email to the body of an appointment.

Using **Task with Attachment** will ensure that the email will be attached - including any attachments to the email



Chapter 11: Attaching an email to an existing Task

See **Chapter 9: Attaching emails to a task** or **Chapter 9: Attaching documents to a task**.

Chapter 11: Attaching an email to an existing Appointment

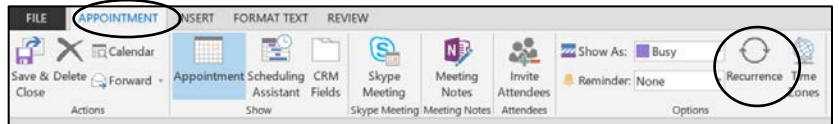
Follow instructions for **Chapter 9: Attaching emails to a task** or **Chapter 9: Attaching documents to a task** only open an appointment instead of a Task.

Chapter 12: Creating recurring Appointments

Open the Appointment

Select **Appointment** from the tabs at the top of your appointment or meeting

Choose the **Recurrence** button on the ribbon



Check the **Start** time, **End** time and **Duration** are correct

Choose the **Recurrence pattern**

Daily

Every "x" day

Weekday only

Weekly

Specific days of week (Mon & Tue)

Every "x" day of month (3rd Thursday)

Monthly

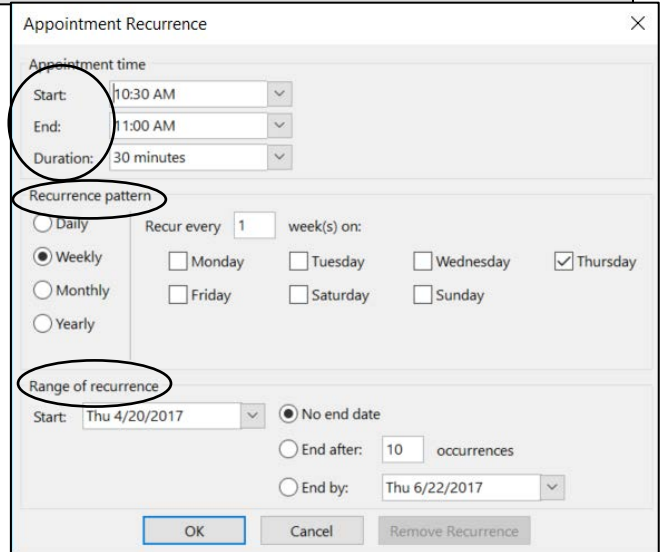
Specific days of month (Wed & Fri)

Every "x" day of month (3rd Thursday of month)

Yearly

Specific date of year (28th March)

Every "x" day of year (2nd Friday of April)



Decided the **Range of recurrence**

Start date

No end date

End after "x" occurrence

End by (choose a specific date)

Click OK

Chapter 12: Setting up the Weekly Calendar View

Go to Calendar

Select **View** from the tabs at the top of your Calendar

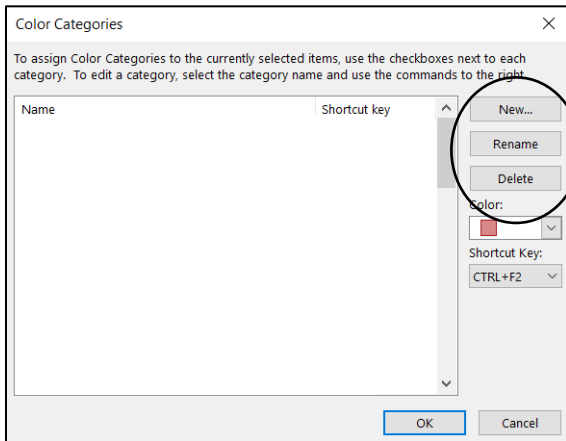
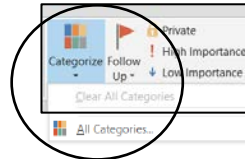
Choose the **Week** or **Work Week** icon on the ribbon





Chapter 12: Adding Categories

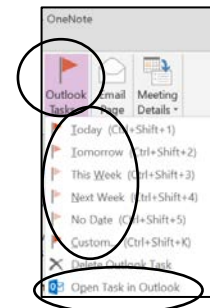
Go to Calendar and open an Appointment
Select **Appointment** from the tabs at the top of your window
Click on **Categorize** on the Untitled Task ribbon
Select **All Categories** from the dropdown list



Click **New...** to add calendar categories
Click **Rename** to change existing categories
Click **Delete** to eliminate existing categories

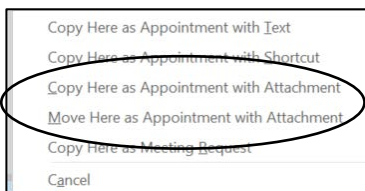
Chapter 12: Creating a Task from OneNote

Go to OneNote and **right-click** anywhere in the text you want to make an Outlook Task
Select **Home** from the tabs at the top of your window
Click on **Outlook Tasks** on the ribbon
Select **Due Date** from the dropdown list
Click on **Outlook Tasks** on the ribbon again
Select **Open Task in Outlook** from the dropdown list



Chapter 12: Copying or Moving a Task directly to the Calendar

Select the Task that you want to attach to a Calendar Appointment
Right-click and drag the task to the **Calendar** on the date and time where you want it to go
When you release your right-click you will get these options: (if you didn't get these choices, try again and be sure to RIGHT-CLICK while you drag.)



We recommend you choose either:

Copy Here as Appointment with Attachment - this will leave one copy of the task in the To-Do Bar and attaches another copy in the body of an appointment.

Move Here as Appointment with Attachment - this deletes the task from the To-Do Bar and attaches the Task to the body of an appointment.



Using **Appointment with Attachment** will ensure that the Task will be attached - including any text, hyperlinks or emails that you included in the body of the Task

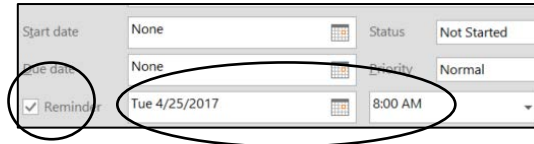
Chapter 12: Using Reminders

Open the Task

Check to box to the left of **Reminder**

Set the **date** and **time** for the reminder

Click **Save and Close**



Chapter 12: Making the ControlPanel the Default View

Go to the Calendar

Select **File** from the tabs at the top of your window

Click on **Options** on the left

Select **Advanced** from the tabs on the left

Click on **Browse** to the right of the folder listed next to **Start Outlook in this folder**

Outlook in this folder

Select **Calendar** from the dropdown

Click OK

Click OK again

