

Tips for Using Microsoft Outlook To Manage Your “To-Do” Lists

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1. When using the Task feature to maintain your various “to-do” lists:
 - a. Use the “category” option to allow you to organize your tasks in various useful views.¹ To categorize a task, input new tasks using the complete new Task box (visible when you double-click on the line that reads “Click here to add new Task” or when you select “File” => “New” => “Task” from the menu bar). In the new Task box (which will bear the heading “Untitled – Task”), click on the “Categories” button to bring up the “Categories” box. In the “Categories” box, click on the category in which you want your task to appear, then click “OK.” When you are finished inputting the new task, click on “Save and Close” in the Task box.
 - b. If you want to use a category that doesn’t already exist in Outlook’s Master Category List, click on the “Master Category List” button (visible in the “Categories” box which appears after you click the “Categories” button in the new Task box) and add any new categories. If you’re going to be using a Palm™, keep the number of categories to fifteen or fewer, since that’s the maximum number of categories permitted in Palm’s To-Do application.²
 - c. Begin each task with the name of the project or client/matter, so that all the tasks on a given project or client/matter will appear together when you view your tasks sorted alphabetically by subject.
 - d. To sort tasks alphabetically by subject (in any view in the Task function), click on the Subject bar at the top of the list. This organizes the tasks into either normal alphabetical order (if the triangle in the Subject bar is pointing up) or reverse alphabetical order (if the triangle in the Subject bar is pointing down). To reverse the direction of the triangle, click again on the shaded Subject bar.
 - e. To sort tasks chronologically by due date (in any view in the Task function), click on the Due Date bar at the top of the list. This organizes the tasks into either normal chronological order (if the triangle in the Due Date bar is pointing up) or reverse chronological order (if the triangle in the Subject bar is pointing down). To reverse the direction of the triangle, click again on the shaded Subject bar.

¹ The specific directions contained in these tips will work verbatim in Microsoft® Outlook® 2000 (in Windows 98); the configuration of the commands and buttons may differ on other versions of Outlook.

² This limitation applies to Palm Applications v. 3.5, which is the version available on Palm Vx as of December 2000. To determine what version your Palm contains, tap the silkscreen “Home” button, then tap the time display => “Options” => “About Applications.”

2. When all your tasks are categorized, use the “By Category” view as your Master To-Do list. On the menu bar, select “View” => “Current View” => “By Category.” The names of the categories will appear in shaded bars. Double-clicking on a shaded bar toggles between showing and hiding the list of tasks in that category. So to view only one category at a time, double-click on all other categories so that only the shaded bars are visible. When viewing tasks within a particular category, click on the Subject bar to view that category’s task alphabetically; click on the Due Date bar to view that category’s task by due date.
3. When all your tasks are categorized, create a weekly “to-do” list as follows:
 - a) From the menu bar, select “View” => “Current View” => “Define Views” to bring up a box titled “Define Views for ‘Tasks’.”
 - b) In the “Define Views for ‘Tasks’” box, click on the “New” button to bring up a box titled “Create a New View.”
 - c) In the “Create a New View” box, insert a name for the new view, such as “Tasks for the Week.” For “Type of view,” select “Table.” Click OK. The “View Summary” box now appears.
 - d) In the “View Summary” box, click on the “Fields” button and choose the fields you want to include in the new view. Include at least the fields for Subject, % Complete, Due Date, and Categories. Click “OK” in the “Show Fields” box. (Do not click on the “OK” button in the “View Summary” box.)
 - e) Back in the “View Summary” box, click on the “Filter” button to bring up the “Filter” box.
 - f) In the “Filter” box, click on the “More Choices” tab, then click on the “Categories” button, and click on the categories you want to appear in the view. Click on “OK” in the “Category” box. (Do not click on the “OK” button of the “Filter” box.)
 - g) Still in the “Filter” box, click on the “Advanced” tab, then click on the “Field” button and select “Frequently Used Fields” => “Due Date.” Under the word “Condition,” select “in the next 7 days.” Click on the “Add to List” button. (Do not click on the “OK” button of the “Filter” box.)
 - h) Still in the “Advanced” tab of the “Filter” box, click on the “Field” button again and select “Frequently Used Fields” => “% Complete.” Under the word “Condition,” select “not equal to.” Under the word “Value,” insert “100.” (This prevents tasks that are 100% complete from appearing in your new view.) Click on the “Add to List” button. (Do not click on the “OK” button of the Filter box.)
 - i) Still in the “Advanced” tab of the “Filter” box, click on the “Field” button again, and again select “Frequently Used Fields” => “Due Date.” Under “Condition,” select “on

or before.” Under “Value,” insert “today.” (This means that overdue items will appear in your list.) Click on the “Add to List” button.

- j) Now click “OK” in the “Filter” box.
- k) Click “OK” in the “View Summary” box.
- l) Click “Apply View” in the “Define Views for ‘Tasks’” box.

Your new view will now appear when you select “View” => “Current View” => “[name of your new view].”

4. Create today’s to-do list by following the same steps as for creating a weekly to-do list, except skip step (g).
5. Within the view you’ve created for your daily to-do list (or your weekly list, for that matter), you can rearrange the order of the items (to put them in the order in which you plan to do them) by using the “% Complete” field as a proxy for priority. For each task, insert any number from 0 and 99, then sort by that field by clicking on the shaded “% Complete” bar at the top of the table.
6. Extra tip: always insert a due date for a task, even if it’s just an approximate one. One handy technique: for tasks that are to be done on some non-specific day during a given week, choose one consistent day of the week to serve as the “holding tank” for your weekly list. For example, if you choose Friday to serve this purpose, part of your weekly planning would involve reviewing all the tasks assigned to that day, and reassigning each tasks to other days of that week based on priority and “critical path” attributes. So whenever you insert a new task, its due date will be the Friday immediately preceding the week you plan to accomplish the task.