

Five tips for organizing your Outlook 2010 tasks



The essential guide to using e-mail and the Internet from

Micro Business Support.

Takeaway: Outlook tasks can help you organize and track various projects and commitments even if you're hopelessly disorganized or insanely busy. Here are a few pointers to help you use tasks effectively.

Are you a list-maker? If so, Outlook 2010 can help you create, organize, and assign tasks so that you're sure to get all the items on your to-do list done. You'll find the Tasks tool at the bottom of the Navigation Pane. (If you have a smaller display, the icon may appear as a small symbol in the tools row at the bottom of the Navigation Pane.) You can use these simple tips to streamline your tasks in Outlook 2010.

1: Create a task quickly

You can create a task quickly by clicking the Task tool in the Navigation Pane and then clicking in the Type A New Task text box in the To-Do Bar. Type the new task and press Enter, and the task is added to the bottom of the list. If you want to add details to the task later, you can double-click it in the list and add a start date and end date, update the status and priority, and add notes about the task to be completed.

2: Create new task categories

It's easy to add your own categories to keep track of tasks that are unique to your business. This helps you see at a glance what kind of task needs to be completed. For example, if you set up Ordering as a Green task, when you see a task marked as green, you'll know that the next item on your list involves ordering new supplies. To set up your own categories, right-click a task, click Categorize, and click All Categories. The Color Categories dialog box appears and you can create new categories, rename existing categories, and add shortcut keys to your new categories so you can mark them as you go.

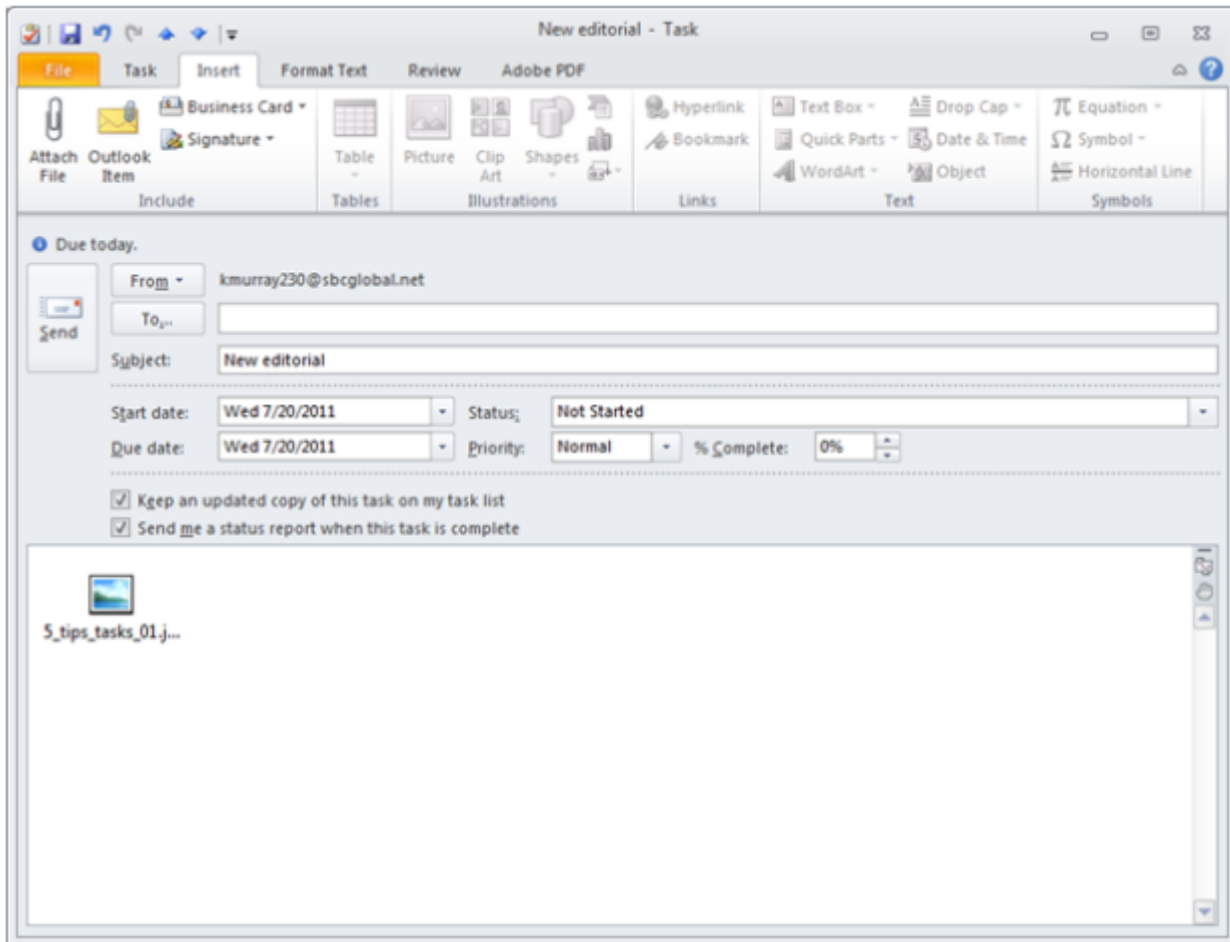
3: Attach files to a task

If the task you need to complete will require some research or a closer look at some resource documents, attach those documents directly to the task. That way, they'll be right there where you need them when you're ready to work on the task. For example, if you're getting ready to edit your organization's newsletter, you can attach the newsletter content to the task when you create it. Then when it's time to complete the task, simply open the file, do the editing, save the file, and mark the task as complete.

To add a file to a task, open the task in the Task window, click the Insert tab, and click Attach File. In the Insert File dialog box, navigate to the file you want, select it, and click Insert. The file is added to the task in the comments area (**Figure A**). To open it, just double-click on it when you're ready to work on the task.



Figure A



You can easily attach files to the task you need to complete.

4: Assign tasks to others

Outlook makes it easy to assign tasks to members of your organization or team. When you assign a task, Outlook sends the task assignment as an email message. The recipient can either accept or reject the task. To assign a task, create it normally. Then, in the Task window, click the Task tab and click Assign Task in the Manage Tasks group. Enter the person's name or click To and choose their name from the Contacts list. If you want Outlook to monitor the status of the task for you, leave the Keep An Updated Copy Of This Task On My Task List check box selected. You can also leave the other option selected so that Outlook lets you know when the task is complete. Click Send to send the task assignment, and relax — now it's off your desk!

5: Make the Tasks icon easier to access

If creating and assigning tasks is a regular part of your daily work in Outlook, and Tasks doesn't appear as one of the large options at the bottom of the Navigation Pane, you can move Tasks up so that it is visible and easy to access. Just right-click the Tasks icon at the bottom of the Navigation Pane and click Navigation Pane



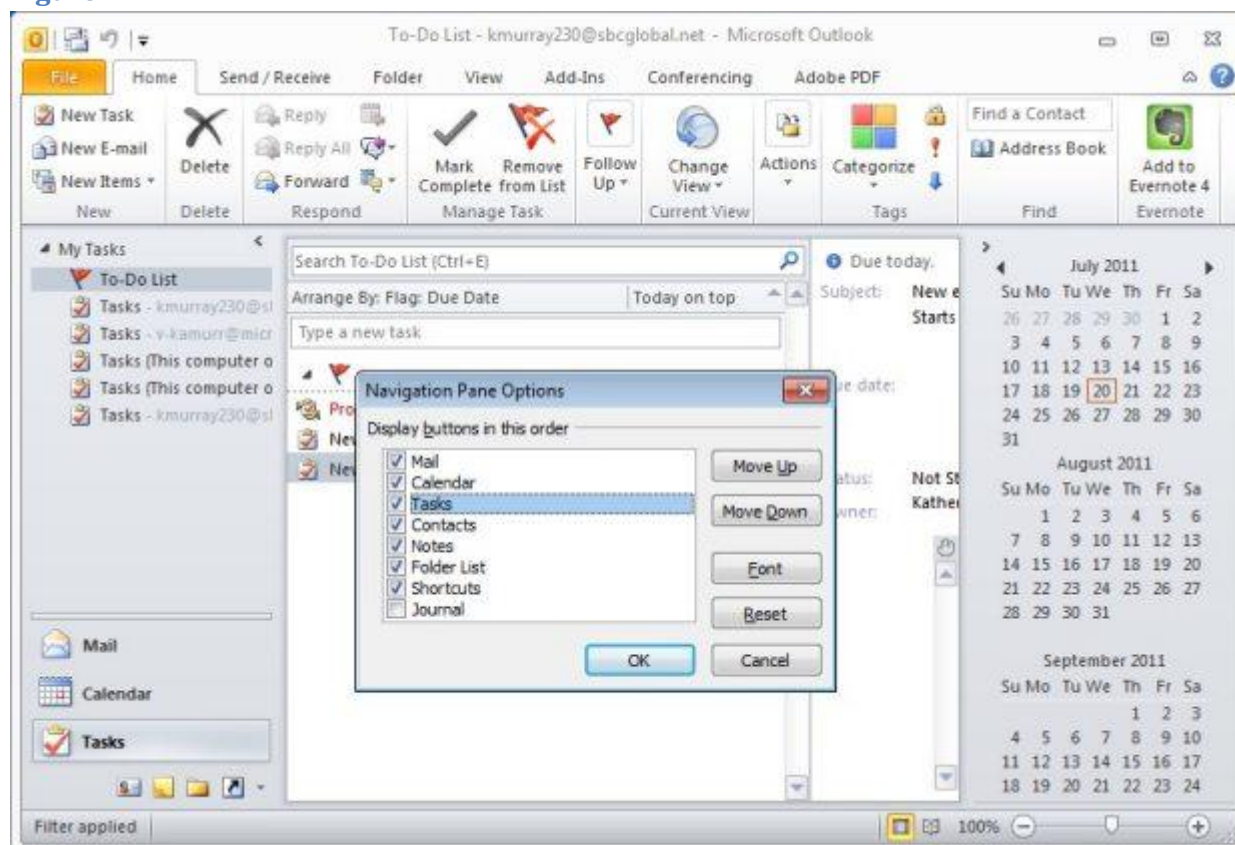
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Options. Now, click Tasks, click the Move Up button (**Figure B**), and click OK. Tasks will appear above Contacts, which means that Contacts on your screen may be relegated to a smaller icon at the bottom of the pane .

Figure B



You can move the display of Tasks up in the Navigation Pane to make it easier to select.



About Katherine Murray

Katherine Murray is a technology writer and the author of more than 60 books on a variety of topics, ranging from small business technology to green computing to blogging to Microsoft Office 2010.