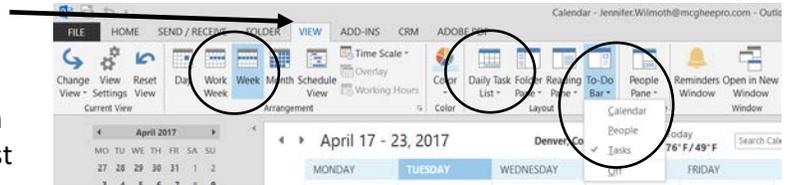


## Chapter 2: Setting up the ControlPanel

Go to your Calendar in Outlook

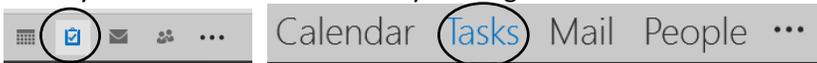
Select **View** from the tabs at the top of your window

1. Choose the **Work Week or Week** icon on the ribbon
2. Choose the **Daily Task List** icon on the ribbon
  - a. Select **Normal** from the dropdown list
3. Choose the **To-Do Bar** icon on the ribbon
  - a. Select **Tasks** from the dropdown list



## Chapter 4: Setting up the To-Do List to view Categories: (None)

Go to your To-Do List in Outlook by clicking on either the task icon or the Tasks navigation buttons



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

Choose the **View Settings** icon on the ribbon

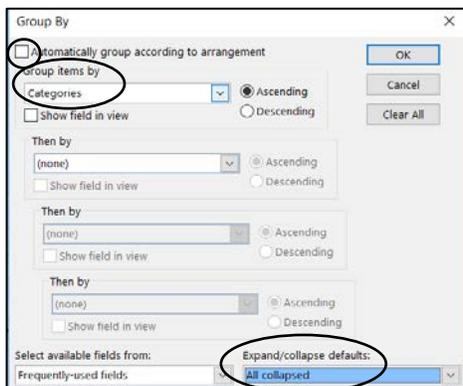
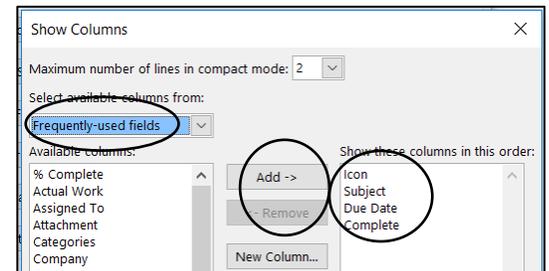
Click on **Columns**

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**

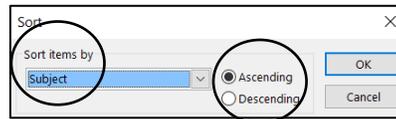
Ensure **Ascending** is selected to the right of **Categories**

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

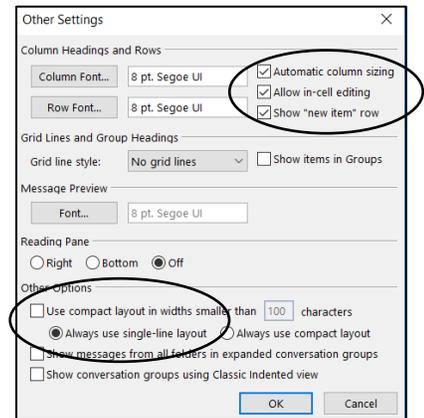
Click **OK** once to return to the View Settings



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

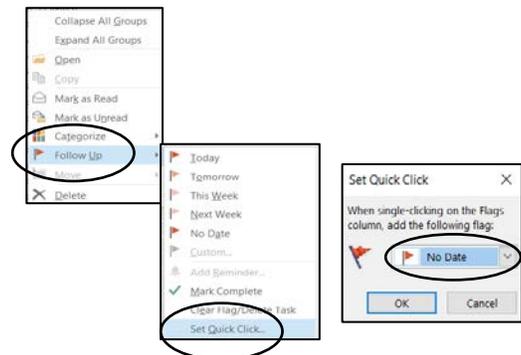


## Chapter 6: Changing the default due date

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

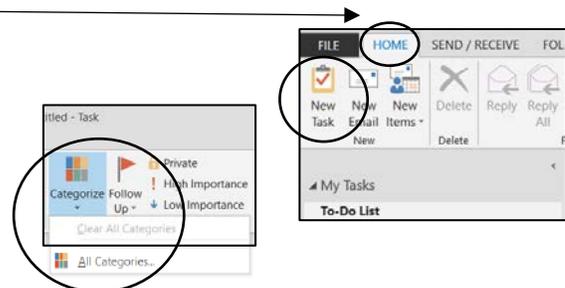
Go to your To-Do List in Outlook by clicking on the task icon or the word **Tasks** (See Chapter 4: Setting up the To-Do List to view Categories: (None) for the graphics if needed.)

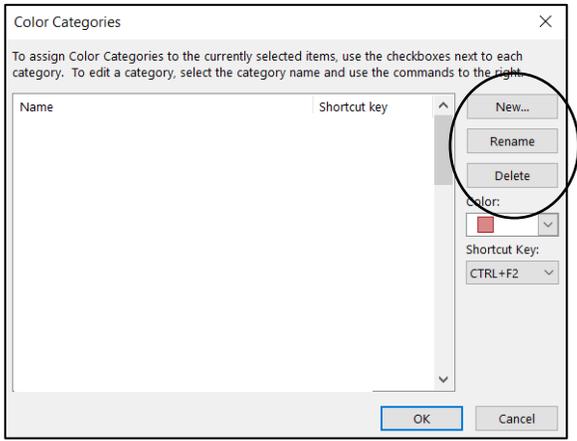
Select **Home** from the tabs at the top of your window

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

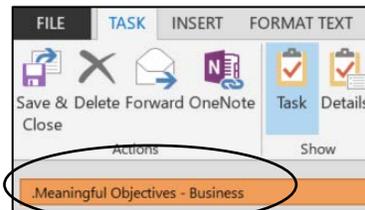
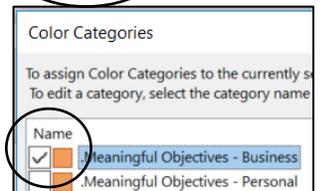
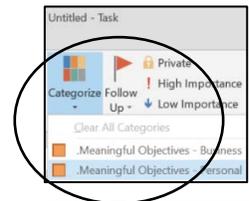
Or if the category isn't in the list,

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,

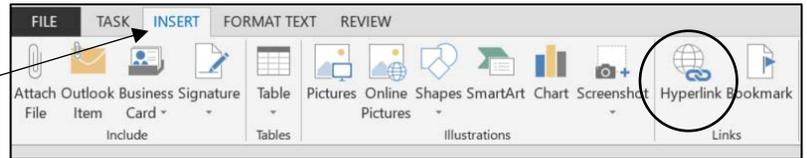
Select **All Categories** from the dropdown list and click the box to the left of the category

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



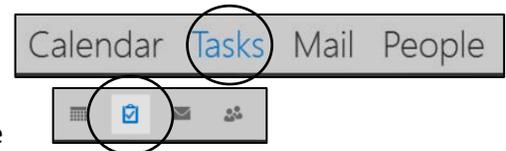
## Chapter 9: Inserting a Hyperlink

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:



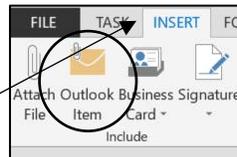
**Copy Here as Appointment with Attachment** - this will leave one copy of the task in the Task List and attaches another copy in the body of an appointment.

**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

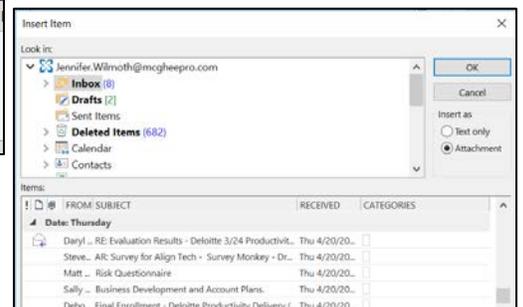
## Chapter 9: Attaching emails to a Task

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)

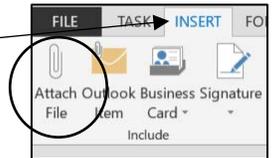
Select the **email** you want and click OK and it will attach that email into the body of your Task





## Chapter 9: Attaching documents to a Task

Open the Task for which you want to attach attached

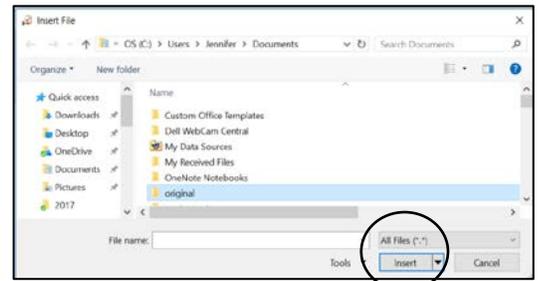


Select **Insert** from the tabs at the top of your Task

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

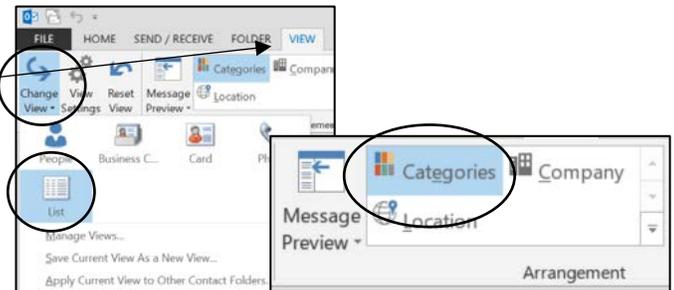
Go to Contacts

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

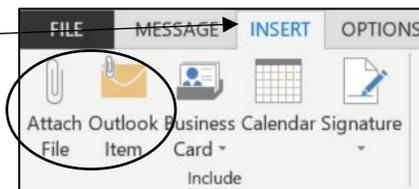
Select **Insert** from the tabs at the top of your email

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

Select the file and click Insert

Or

Select the item and click OK



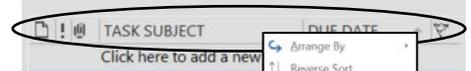


## Chapter 11: Setting up the To-Do Bar

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

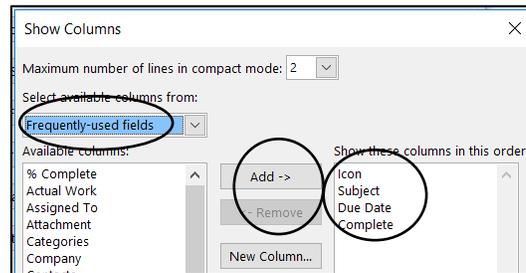


Click on **Columns**

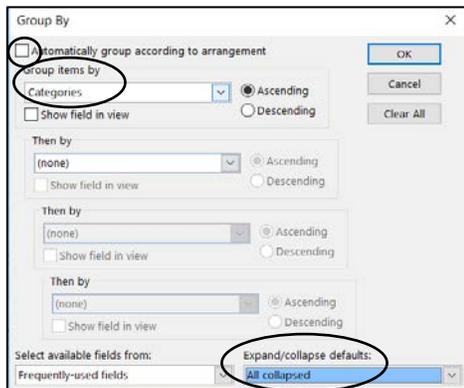
Choose **Frequently Used Fields** under **Select available Columns From**

**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





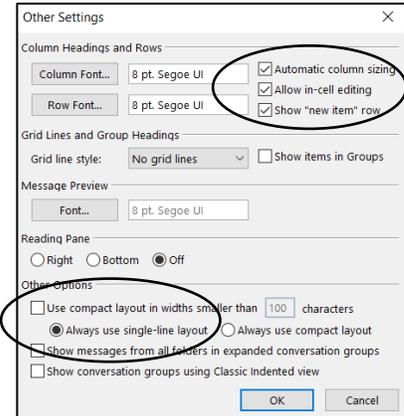
Click on **Other Settings**

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

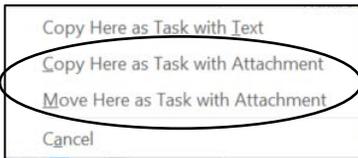


## Chapter 11: Dragging an email to the To-Do Bar

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.

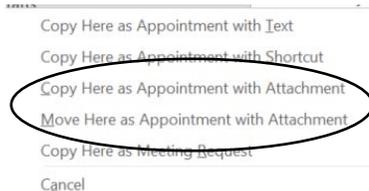
Using **Task with Attachment** will ensure that the email will be attached - including any attachments to the email

## 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 (3<sup>rd</sup> Thursday)

Monthly

Specific days of month (Wed & Fri)

Every "x" day of month (3<sup>rd</sup> Thursday of month)

Yearly

Specific date of year (28<sup>th</sup> March)

Every "x" day of year (2<sup>nd</sup> Friday of April)

Decided the **Range of recurrence**

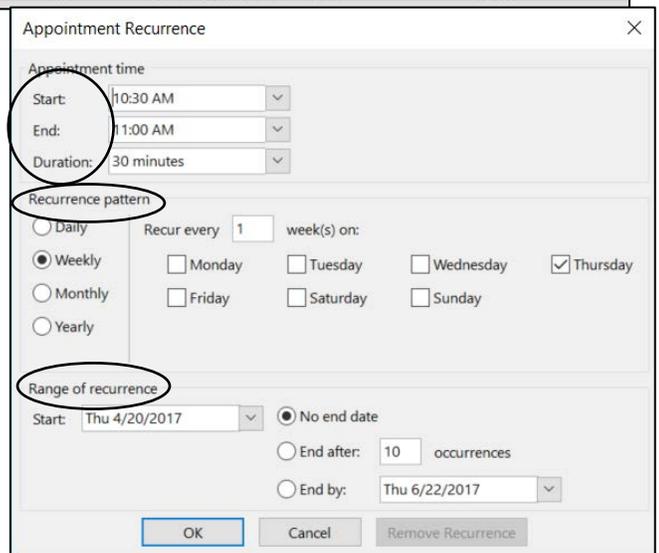
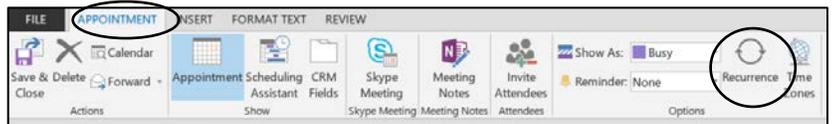
Start date

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

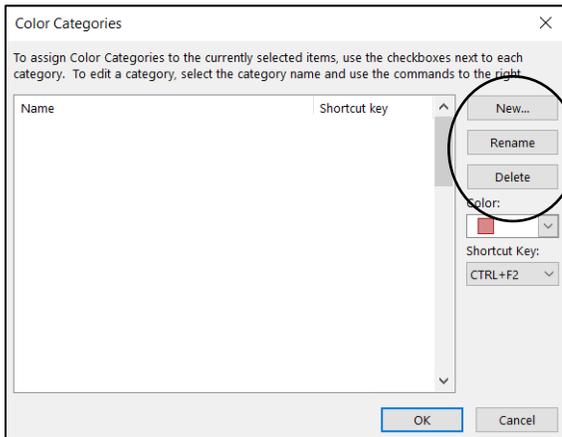
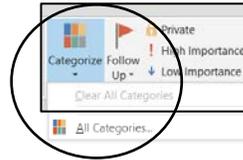
Choose the **Week** or **Work Week** icon on the ribbon





## Chapter 12: Adding Categories

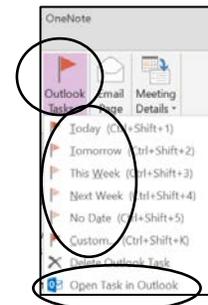
Go to Calendar and open an Appointment  
Select **Appointment** from the tabs at the top of your window  
Click on **Categorize** on the Untitled Task ribbon  
Select **All Categories** from the dropdown list



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

