

Technical Setup Instructions For Microsoft[®] Outlook[®] for Mac 2016-2019

Create Lists in Tasks Using Categories

Purpose: This creates your structure for lists using the categories feature.

1. Open Tasks.
2. Click on the Categorize button in the Outlook ribbon under the Home tab. If it's gray out, open a new Task (⌘ N) to get to an active Categorize button instead.
3. The default Outlook categories (Blue category, Green category, etc.) and any others you have created will appear. Click Edit Categories...
4. Add new lists, one at a time, by double-clicking on an existing category and changing the name and assigning a color, or by clicking the plus sign at the bottom of the categories window to add a new one. Here are the ones we suggest:

Planning Categories:

.Meaningful Objectives: Business
.Meaningful Objectives: Personal
.Supporting Projects: Business
.Supporting Projects: Personal
1:1 Meetings

Action Categories:

SNA Calls	SNA Home
SNA Computer/Online	SNA Read/Watch
SNA Email	SNA Waiting For
SNA Errands	Someday Maybe

5. Delete any categories you no longer need by clicking on the category name and selecting the minus sign. Deleting a category does not delete the items that were assigned to it. Those items will need to be reassigned to new lists and will show up under the all tasks view in the left panel called Tasks.

Create Views in Tasks Using Smart Folders

Purpose: View your lists by sorted categories, versus one big Tasks list.

Note: This step is only needed if you are on Outlook for Mac 2019. In previous versions, categories appear as checkboxes to turn on/off.

1. Click on Tasks in the top-left sidebar, which is the view for all tasks.
2. Click in the search box in the upper-right corner of Outlook.
3. Select All Tasks in the ribbon as the search criteria.
4. Click Advanced to select Category.
5. Click on the Item Contains drop-down menu and choose Category.
6. Click on the drop-down menu where None appears and choose the first category listed (such as .Supporting Projects).
7. Click Save Search and name your search the name of your list.
8. Click on Tasks in the top-left sidebar, which is the view for all tasks. and repeat steps 1–7 for all your categories/lists.

Note: Smart Folders are sorted in alphabetical order and cannot be reordered. For that reason, we recommend adding a period before Supporting Projects and Meaningful Objectives to force them to the top. Unfortunately, Smart Folders do not sync to the Microsoft To-Do mobile app or Outlook.com—only the Tasks folder will sync. Your tasks will all appear in Microsoft To Do under one folder called Tasks.

Create a New Task

Purpose: Add new tasks to your lists.

1. Click on the Task icon in the top left corner of Outlook, or use the keyboard shortcut **⌘ N**.
2. In the New Task field, enter the description for your Meaningful Objective, Supporting Project, or Strategic Next Action.
3. Click Categorize button to assign your new item to a list.
4. Add a due date if there is one.
5. Click Save & Close when done.

Turning an Email into a New Task

Purpose: Quickly create new tasks from emails.

1. Click on or open the email to create a task from.
2. Click Message > Create > Task in the menu or click on the email and drag it over the Tasks icon in the bottom left navigation area until you see a + sign. If you don't see the menu with Message, be sure you are not in full screen view.

A new Task is created with text from the email in the note field of the Task. The subject line of the task is copied from the subject line of the email. The original email is still located in the same folder you copied it from.

3. Edit the subject line.
4. Categorize the Task. Save & Close.
5. Go back to Mail and file if you need the original email or delete it.

Turn Off Email Notifications

Purpose: Eliminate distractions so you can stay focused on what's most important.

1. Go to Outlook > Preferences > Notifications & Sounds.
2. Uncheck all message arrival notifications and sounds.

Mac vs. Windows

If you're an Outlook for Windows user as well as Mac, there are some distinct differences between the two versions to be aware of. What's not available yet in Outlook for Mac that we typically recommend:

- To-Do View
- To-Do Bar in Calendar
- Creating a new Task with the email as an attachment
- Conditional Formatting colors in email or calendar
- Task folders that sync to Microsoft To Do app and Outlook.com
- Customizing the Tasks view
- Quick Steps
- Quick Parts
- Opening to Calendar as default
- Daily Task List in Calendar
- Extensive preferences and options
- Universal shortcut keys for new email and new task (only **⌘ N**, which works in current view only)