

# Setup Guide

## For Microsoft Outlook for Windows

### Part One - Configuring Views

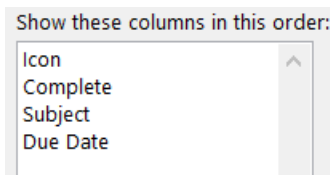
The first step in using Outlook effectively for your Action System list is to configure your views to be able to easily focus on getting the right things done.

#### Change the To-Do Bar View in the Calendar

1. Go to your Calendar.
2. Go to View > To-Do Bar > check off Tasks. The To-Do Bar should appear to the right of your calendar.
3. Right-click in the column header in the To-Do Bar above Click here to add new Task and select View Settings. Yours may say something different than Task Subject—that's fine.



4. Click on Columns button.
5. Modify the list on the right-hand side by adding/removing desired columns. We recommend simplifying to these four columns:



You may need to change “Select columns from” to Frequently Used Fields if you are not seeing the columns above as options.

7. Click OK to return to View window.
8. Click on Group By button.
9. Uncheck automatically group according to arrangement.
10. Group by Categories > Ascending.
11. Click OK to return to View window.

11. Click Sort button.
12. Sort by Subject > Ascending.
13. Click OK to return to View window.
14. Click on Other Settings button.
15. Uncheck Use compact layout in widths smaller than 125 characters.
16. Select Always use single-line layout.

Other Options

Use compact layout in widths smaller than  characters

Always use single-line layout  Always use compact layout

17. Click OK to return to View window.

Your final view should look like this:

Advanced View Settings: To-Do List

Description

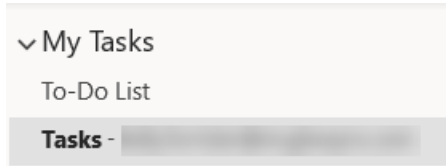
Columns...	Icon, Complete, Subject, Due Date
Group By...	Categories (ascending)
Sort...	Subject (ascending)
Filter...	Tasks: Advanced
Other Settings...	Fonts and other Table View settings
Conditional Formatting...	User defined fonts on each message
Format Columns...	Specify the display formats for each field

Reset Current View      OK      Cancel

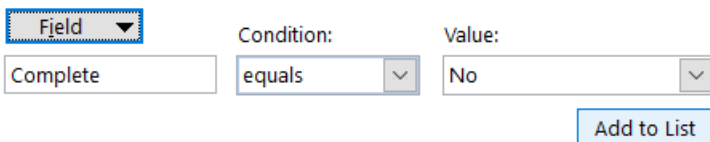
18. Click OK to save changes.

## Change the Task View in Tasks

1. Go to Tasks.
2. Click on Tasks in the left panel, below To-Do List.



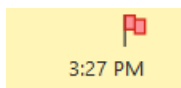
3. Click on Home > Current View > Simple List
4. Click on View > Current Settings
5. Click on Filter > Advanced. Click on Field button > Frequently Used Fields > Complete > Add to List.



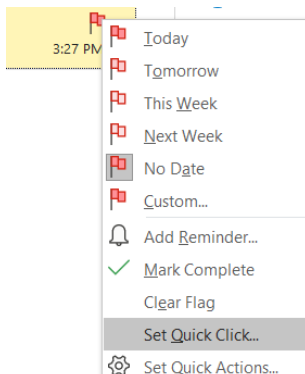
6. Click OK twice to exit View settings.

## Change the Default Due Date on Flagged Emails

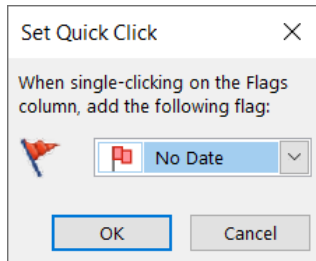
1. Go to any flagged email in Mail.
2. Right click on the flag for that email.



3. Select Set Quick Click from the drop-down menu.



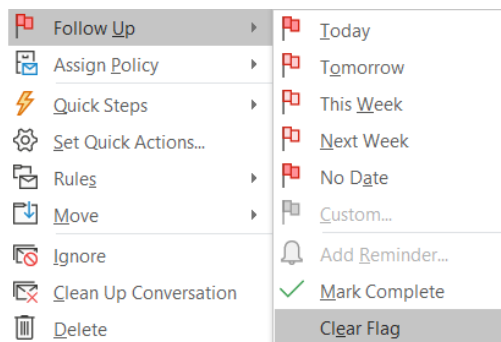
#### 4. Select No Date. Click OK.



This will set all future flagged items to no due date, instead of the default of tomorrow.

### Remove Flagged Emails From Tasks

To remove emails you've flagged from appearing in your task lists, highlight the emails in Mail or tasks they created in Tasks, right click, and choose Follow Up > Clear Flag.



## Part Two - Creating Lists

Now that you've configured your view, the next step is to create lists. There are two methods for doing this.

Method One uses the Categories feature in Tasks to create lists, which is the classic method we've taught setting up Tasks for many years. Unfortunately, Categories will not sync to the Microsoft To-Do app on your mobile device or to Outlook Tasks in Microsoft Office 365. The individual tasks will still sync, but as one single list.

Method Two uses the Tasks folder feature to create lists. These folders will sync to Microsoft To-Do app on your mobile device and to Outlook Tasks in Office 365, for a seamless experience across platforms.

Either method is effective for your Outlook desktop, but if you are syncing Outlook Tasks to your mobile device or viewing Tasks on Office 365 and want to see separate lists, Method Two using folders is recommended.

### Method One: Setting Up Categories as Lists

*If you don't plan to sync Tasks to Microsoft To-Do app on your mobile device, or just prefer the category method, use this option.*

1. Open Tasks.
2. Open a new Task (Ctrl + Shift + K).
3. Click on the Categories icon in the ribbon.
4. Select All Categories



5. Delete unnecessary categories. Deleting categories does not delete the items assigned to it.
6. Add new categories. Here are the ones we suggest:

.Meaningful Objectives	SNA To-Do	1:1 [Meeting/Person]
.Supporting Projects	SNA Waiting For	Someday/Maybe

**Notes:** The period before Meaningful Objectives and Supporting Projects is intentional, to force sorting in Outlook. SNA stands for "strategic next action." You will likely have several 1:1 lists, for people or teams you meet with regularly. Assigning colors or shortcut keys to your categories is up to you.

7. Click OK when done to save your new categories.

8. Click X in top-corner to exit the Task window you opened without saving it. Your categories are saved even though you are not saving this task. The categories will not appear in the To-Do Bar until you assign Tasks to them.

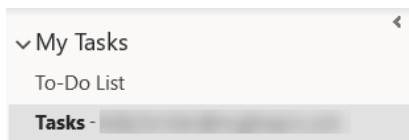
Your final view, when populated with tasks, will look like this:

<input type="checkbox"/>	Subject	Due Date
Click here to add a new Task		
>	.Meaningful Objectives: 5 item(s)	
>	.Supporting Projects: 26 item(s)	
>	1:1 Sally: 9 item(s)	
>	SNA To-Do: 66 item(s)	
>	SNA Waiting For: 32 item(s)	
>	Someday Maybe: 56 item(s)	

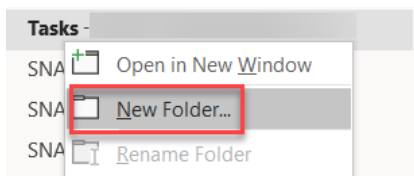
## Method Two: Setting Up Task Folders as Lists

*If you plan to sync Tasks to Microsoft To-Do app on your mobile device, use this option.*

1. Open Tasks.
2. Click on Tasks in the left panel, below To-Do List.



3. Right-click on Tasks and select New Folder.



4. Name your first folder .Meaningful Objectives.

Create New Folder ×

Name:

Folder contains:

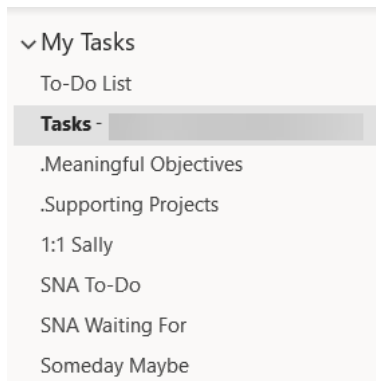
5. Click OK.

6. Repeat steps 1-5 to set up the remaining 5 folders. Be sure you are clicked on Tasks when you create each new one, or you may be saving it in the wrong location. In total, you will be creating at least 6 new Task folders:

<i>.Meaningful Objectives</i>	<i>SNA To-Do</i>	<i>1:1 [Meeting/Person]</i>
<i>.Supporting Projects</i>	<i>SNA Waiting For</i>	<i>Someday/Maybe</i>

**Notes:** The period before Meaningful Objectives and Supporting Projects is intentional, to force sorting in Outlook. SNA stands for “strategic next action.” You will likely have several 1:1 lists, for people or teams you meet with regularly.

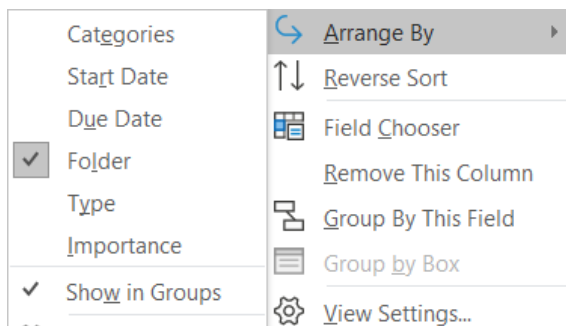
Your final view will look like this:



7. Go back to your calendar and right-click in the column header in the To-Do Bar above Click here to add new Task.



Choose Arrange By > Folder and be sure Show in Groups is checked off.



## Part Three – Adding Tasks

1. To add a new Task, click on the New Task icon in the top-left corner of the ribbon. Or, use the keyboard shortcut Ctrl + Shift + K.

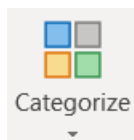
2. Enter your Meaningful Objective, Supporting Project, or Strategic Next Action in the subject field.

Subject	Take trip to Aspen
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3. Add a due date if relevant.

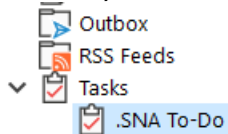
4. Assign your Task to a list.

- If you are using the Category method, click on the Categorize icon in the ribbon and select your category.



Click Save & Close to exit and save the task.

- If you are using the Task Folder method, use the keyboard shortcut Ctrl + Shift + V to select your folder. You'll find it under Tasks.



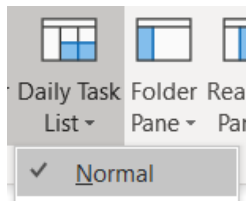
- Selecting the folder (e.g. SNA To-Do) automatically saves and closes the task. It's important that you do not use Save & Close button with this method, or it will not save to a folder you created—it will be automatically saved to the general Tasks folder in the left panel, below To-Do List view. If you Save & Close by accident, instead of using Ctrl + Shift + V, that's where you'll find it.



## Part Four – Optimizing the Calendar

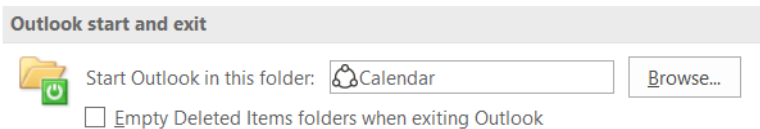
### Show the Daily Task List

1. Go to Calendar.
2. Select View from the Menu and select Day, Work Week, or Week view.
3. Select Daily Task List > Normal.



### Start Outlook in the Calendar View

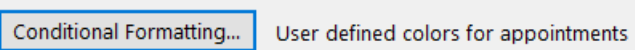
1. Go to File > Options > Advanced.
2. Click Browse and choose Calendar.



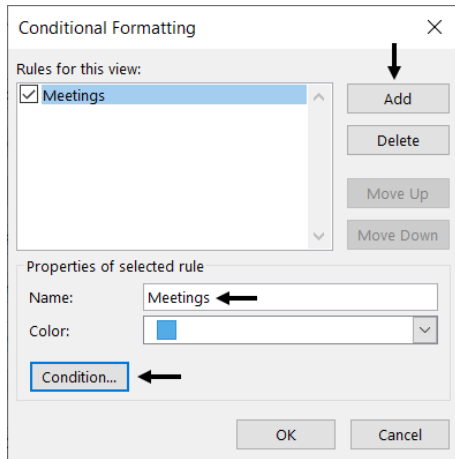
3. Click OK.

### Set Up Calendar Color Coding

1. Go to Calendar > View > View Settings.
2. Select Conditional Formatting.

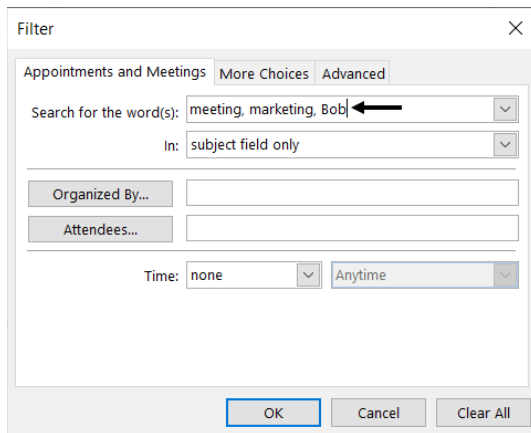


3. Click Add and assign a name.



Then click Condition.

4. Add keywords to assign to the color, such as type of appointment, person, topic, etc.

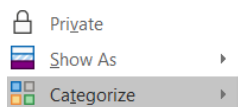


5. Click OK when done.

## Assign Categories to Calendar Entries

1. Right click on a calendar appointment.

2. Click Categorize.



3. Choose a category. To add a new category, select All Categories.

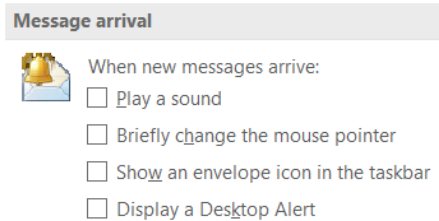


4. Select Save & Close when done.

## Part Five – Optimizing Email

### Turn Off Email Notifications

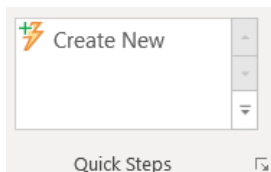
1. Go to File > Options > Mail.
2. Uncheck all message arrival notifications.



3. Click OK.

### Create a Quick Step for Task and File

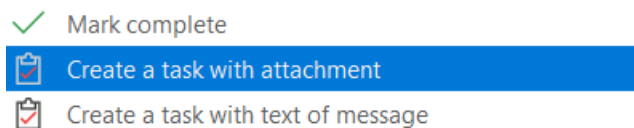
1. Go to Inbox > Home Tab.
2. Find Quick Steps in ribbon.
3. Select Create New from the Quick Steps box or drop-down menu.



4. Name Quick Step Task and File.



5. Choose Create task with attachment as the action.



6. Click Add Action button.

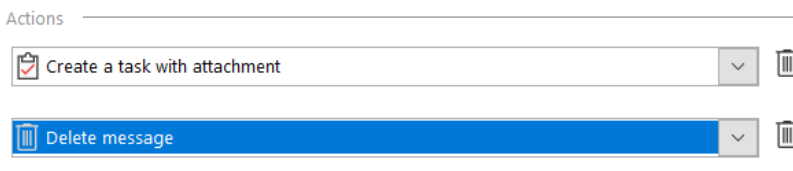
7. Select Move to Folder > Always ask for folder.



8. Choose a Shortcut key.

9. Click Finish.

**Note:** To create a Quick Step for Task and Delete, follow the steps above, but name it Task and Delete and choose Delete message instead of Move to folder in step 7.



## Create Quick Parts

1. Create a new email (Ctrl + Shift + M).
2. Type your desired template (e.g. PASS email model) into the body of the email.
3. Highlight the text, then click on the Insert tab and select Quick Parts.
4. Select Save Selection to Quick Part Gallery at the bottom of the window.
5. Name the Quick Part template. Click OK.
6. Select Insert > Quick Parts and select Quick Part to use. It will insert where your cursor is. You can also type the first letter of the name of the Quick Part in your email body and press Fn + F3. As long as no two Quick Parts names start with the same letter, your intended Quick Part should be automatically inserted.

The McGhee PASS Model is a great one to start with:

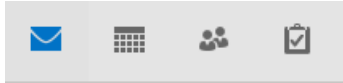
[PURPOSE]

[ACTIONS]

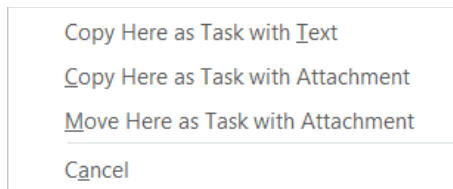
[SUPPORTING INFORMATION]

## Use Right-Click Drag to Process Email

1. Right-click and hold on an email.
2. Drag email to Calendar, Contacts, or Tasks icon and release mouse hold.



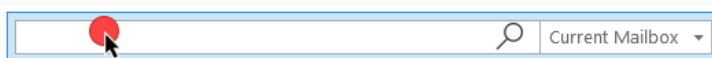
3. Select Copy Here as Task with Attachment.



4. Change subject line, set due date, and categorize.
5. Click Save & Close.
6. File or delete email.

## Use Advanced Search

1. Go to Email.
2. Click in the Search window.



The More+ button now appears in the ribbon.



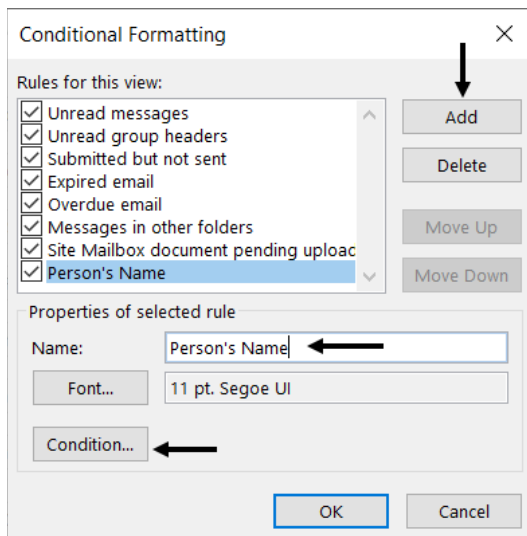
3. Select search properties – you can add as many as you like.

## Set Up Email Color Coding

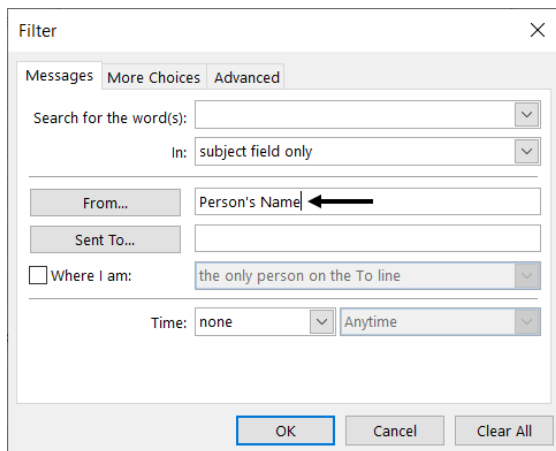
1. Go to Email > View > View Settings.
2. Select Conditional Formatting.

Conditional Formatting... User defined fonts on each message

3. Click Add.
4. Name the condition (e.g. person's name).
5. Click Condition.



6. Add the person's name as sender (or any other criteria for your condition, such as subject, keywords, or sent to).



7. Click OK twice to save and exit.

*Please Note: Throughout these instructions, there may be slight differences in screenshots and instructions between versions, but the differences will be minimal, and the instructions should serve all users from Outlook 2013-2019.*

# Workflow Decisions

