

K2 Enterprises®

Reclaim Your Life Using Microsoft Outlook





Signs of a Need for Better Control

- Does your inbox contain more than 20 items?
- Is your to-do list longer than your VISA bill?
- Are you missing some deadlines?
- Are you working extra hours to meet all deadlines?
- Do you often have trouble finding information needed to complete tasks?

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Outlook Can Help

- Better organization of information
- Better management of tasks and deadlines
- Can't solve all workload issues but can eliminated wasted time
- A change in your work habits may be required – Are you willing?

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Best Practices for Managing Task & E-Mail

1. Tracking All Tasks in Outlook Tasks System
2. Distinguishing Between Master and Daily Tasks
3. Using a Simple Prioritization System That Emphasizes Must-Do-Today Tasks
4. Writing Only Next Actions on Your Daily List
5. Daily and Weekly Planning
6. Converting E-Mails to Tasks
7. Filing E-Mails Using Outlook Categories
8. Delegating Tasks Effectively

Source: Total Workday Control Using Microsoft Outlook , Michael Linenberger

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Managing Your Inbox

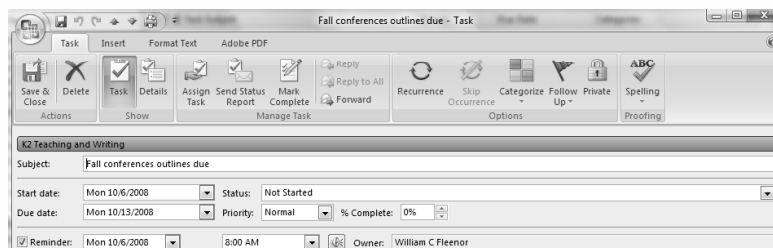
Every time you go to your inbox your plan should be to leave it empty. All emails should be dealt with by **either**:

- Deleting the email,
- **If Task Takes Less Than Two Minutes Do It** and file the email,
- Completing the required task that take longer than two minutes and file the email, or
- Creating a task **or** calendar event scheduling the associated task and file the email.

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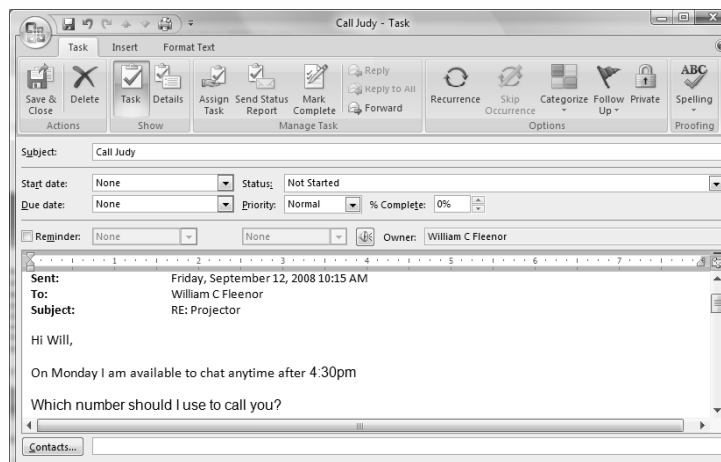
Creating Tasks from Emails

- Drag the email to the “Tasks” display button
- Schedule a due date
- Include a reminder date and time
- Assign a category to all tasks
- File the email



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Creating Task from an Email

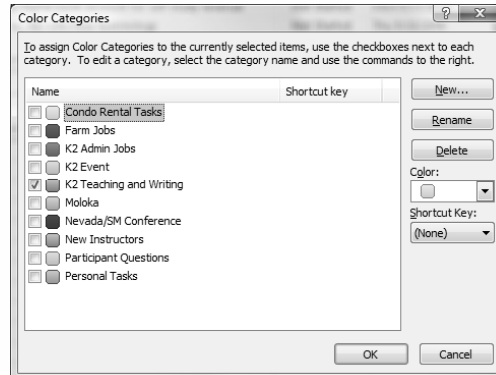


Should this be a task or an appointment?

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Assign Everything to a Category

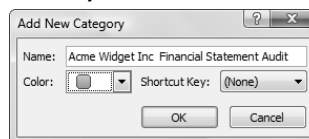
By assigning everything to a category you can easily focus on specific types of tasks (ex. business tasks vs. personal tasks).



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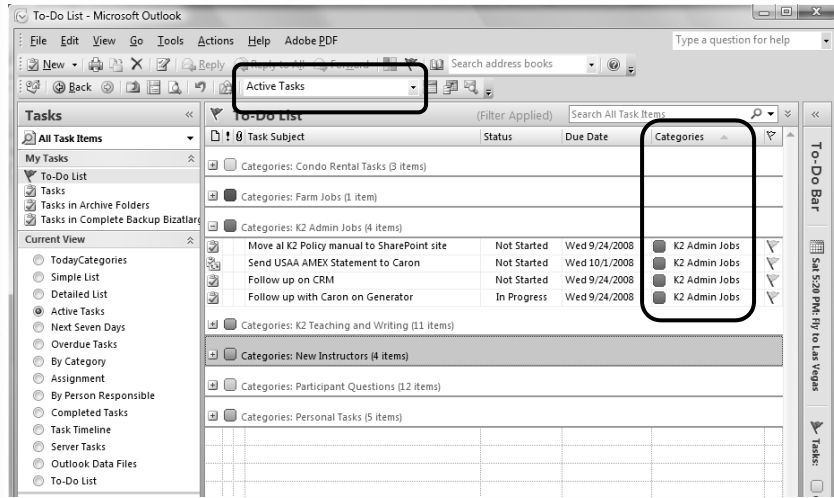
Using Colors to Categorize Tasks

Color Categories provide users with a visual method of categorizing items in Outlook so that users can quickly and easily group, retrieve, and view these items. For instance, suppose a user was working on a project and wanted to color-code all e-mail messages, calendar entries, and tasks in Outlook related to the project. Using Color Categories in Outlook 2007, the user would be able to assign quickly color categories to each relevant entry in Outlook.



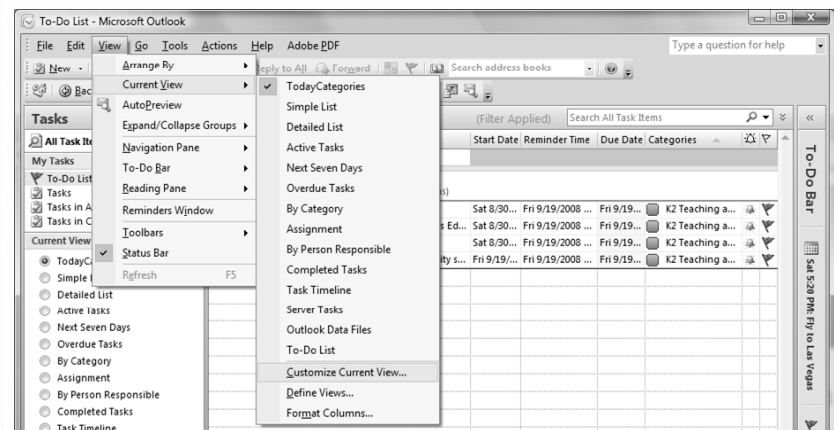
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View of Active Tasks



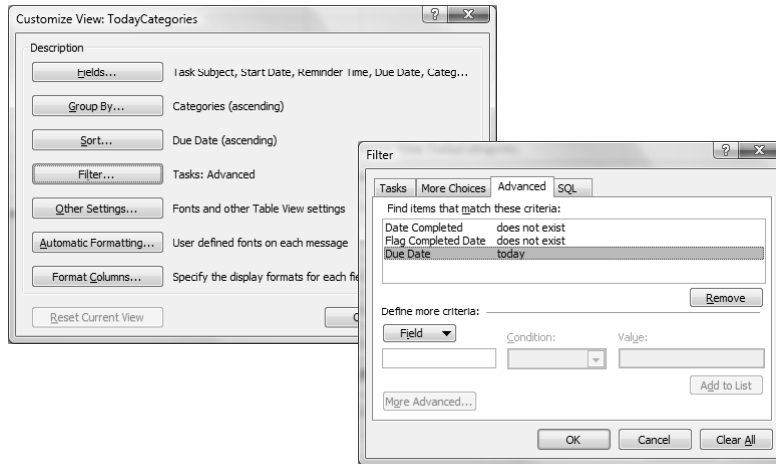
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Creating a Custom View of Tasks



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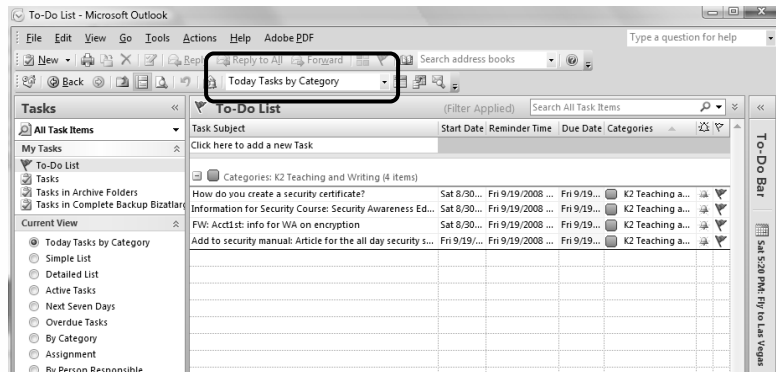
Creating a View of Today's Tasks



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Today's Tasks By Category

- Allows you to start the day with a view of what is scheduled for the day



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Using the Calendar for Tasks

“Our statistics show that there’s a 75% greater chance that you’ll complete a task if it’s on your Calendar rather than just on your Task list.”

Source: “Take Back Your Life!,” Sally McGhee

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View from Command Central

The screenshot displays the Microsoft Outlook calendar interface. The main window shows a weekly view for the period from September 29 to October 3, 2008. The calendar grid includes several tasks: 'Advanced Excel' (Macon, GA, Job ID 8376) on Monday, 'QuickBooks for Accountants' (Macon, GA, Job ID 8377) on Tuesday, 'Teach Security Course' (St. Louis, MO) on Wednesday, and 'Visit Mother Kentucky' on Thursday. A 'To-Do Bar' on the right side lists tasks such as 'Fly to Las Vegas' (Sat 5:20 PM - 9:05 PM), 'Accountants Technology Conf' (Sun 8:00 AM - 8:30 AM), and 'Meet with Julie' (Sun 9:30 AM - 10:00 AM). The interface also features a 'Tasks' pane at the bottom showing 'Show tasks on: Due Date' and a 'Folder List' on the left side.

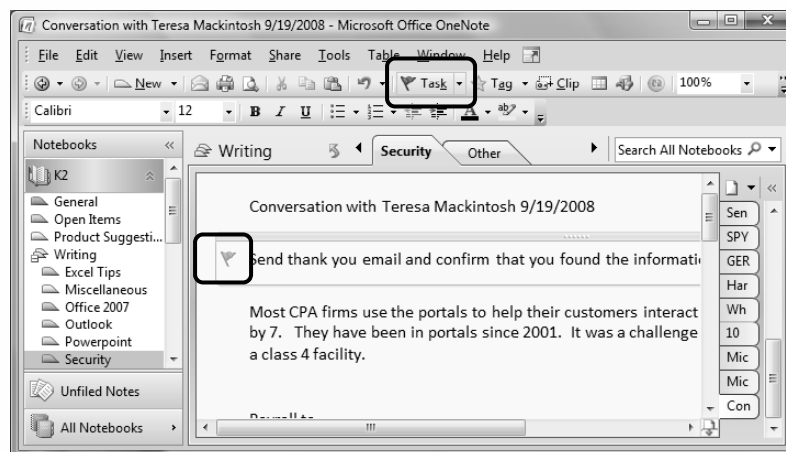
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Using OneNote with Outlook

- Keep Notes in OneNote
- Click on Task Icon
- The Note Will Become a Task in Your Outlook
- Click Again and It Becomes a Completed Task
- Click Again and It is un-linked

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Using OneNote with Outlook



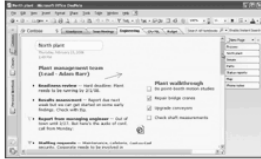
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<http://office.microsoft.com/en-us/onenote/HA101686341033.aspx>

Demo: What is OneNote?

Applies to: Microsoft Office OneNote 2007, Outlook 2007

Download the 2007 Office release



Play Demo

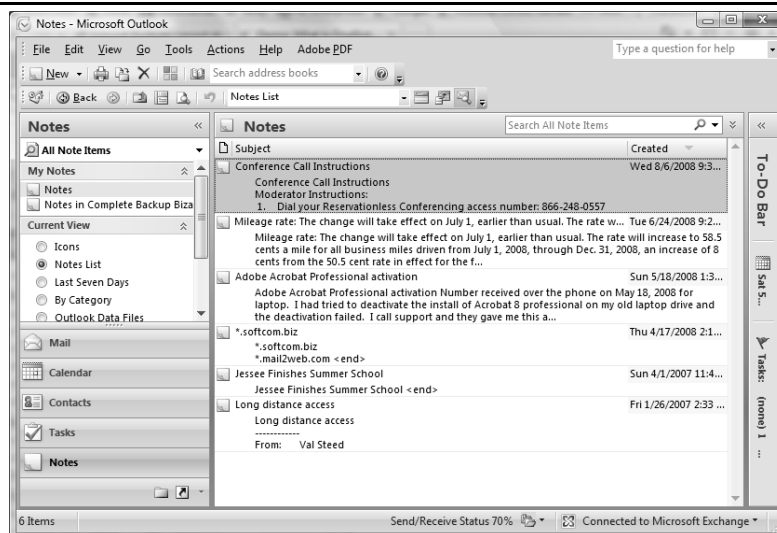
(Or download the demo.)

You may experience a delay while the demo is loading.

Many of us carry a notebook or notepad around to take notes for business, school, or personal projects. But can you easily find — and decipher — the info you need? Is it convenient to share your notes with others? Take control with Microsoft Office OneNote 2007, the easy-to-use note-taking and information-management program where you can capture ideas and information in electronic form. Insert files or Web content in full-color, searchable format or as icons that you can click to access. Watch this demo to see how simple it is to gather, format, organize, and share information. And then say goodbye to your notepad!

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Use Outlook Notes to Track Misc Items



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Questions



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