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Learning Solutions



NORTH SHORE
INNOVATIONS, LTD.

TIME AND TASK MANAGEMENT USING MICROSOFT OFFICE OUTLOOK 2003

INTRODUCTION

E-mail, calendaring, and meeting management are critical activities that drive individual workers' daily lives. So many people "live" in Microsoft Office Outlook 2003, making it their prime tool for communication and productivity. This course will provide experienced business professionals with a better hands-on understanding of how to manage their time more effectively, define tasks more accurately, and process incoming information more efficiently. Using Microsoft Office Outlook 2003 as a "dashboard" application, students will learn how to manage their schedules, projects and assignments, and create and respond to e-mail with greater confidence.

AUDIENCE

This course is designed for people who rely on Outlook for communication and who already use it for basic information workflow tasks such as e-mail, appointments and managing task lists. They are accomplished users of the application, but are looking for techniques to better manage Inbox overload and more effectively define and execute tasks, all to maximize productivity in a standard work day.

AT COURSE COMPLETION

After completing this course, students will be able to:

<ul style="list-style-type: none">•	Use dated and undated tasks, combined with context and categorization to make an informed decision about the next most important thing that needs to be done at any given time.
<ul style="list-style-type: none">•	Effectively customize and manage the Task Pad and Task window in Outlook to provide the right types of information for various life and business scenarios.
<ul style="list-style-type: none">•	Learn how to make e-mail more useful and get faster, more accurate responses by creating meaningful subject lines.
<ul style="list-style-type: none">•	Learn how to use drag-and-drop techniques to instantly convert e-mail into calendar events or tasks. Students will also learn how these techniques can be used to attach the e-mail (including any file attachments) or convert the e-mail body to a text note in the new appointment or task.
<ul style="list-style-type: none">•	Use custom views to create the "Outlook Dashboard" to bring all of the information necessary to properly manage time and tasks into one central location.

PREREQUISITES

Before attending this course, students must have:

<ul style="list-style-type: none">•	Experience as business professionals who work within Outlook and Microsoft Office as a
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	regular part of their day.
•	A working familiarity with Outlook as a communications platform; specifically through e-mails, appointments and reminders, and tasks.
•	A general awareness of time management principles, and a desire to take control of their day.

COURSE OUTLINE

Module 1: Introduction to Microsoft Outlook

This module provides a basic understanding of how Outlook functions within the concepts of time and task management. Because each individual brings different levels of experience with Outlook with them, this module will help to create a common basis of understanding on which the remainder of the course will be based.

Topics and Activities

•	Outlook Is An Information Processor
•	Walkthrough: Panes and Views in Outlook
•	Walkthrough: Configuring the Navigation Pane
•	Discussion: Challenges to be Addressed

After completing this module, students will be able to:

•	Know how to use Outlook as an information processor.
•	Navigate Outlook quickly and easily.
•	Understand the purpose of each Outlook tool
•	Customize Outlook for everyday use.

Module 2: Effective Use of E-Mail

This module introduces the core concepts of the value of an empty Inbox, processing and action as discrete activities, creating a filing system in Outlook, filing and retrieving e-mail, and applying a three-criteria model called the 3D Filter (Do, Delegate, Defer) to each message in the Inbox to decide on its disposition. These concepts will prepare you for the time and task management modules that follow. Microsoft Office Outlook 2003 provides a unique integrated environment for managing these three information objects and converting e-mail into actionable tasks and calendar entries.

Topics and Activities

•	Two Approaches for Two Kinds of Mail
•	E-Mail: Process, Then Take Action
•	Exercise 1: Creating an Effective Filing System
•	Exercise 2: How to Process E-Mail
•	Discussion: How to Process Task-Oriented E-Mail

After completing this module, students will be able to:

•	Describe the difference between processing e-mail and taking action on the tasks contained in those messages, and also explain the importance of keeping these two activities separate.
•	Create an efficient filing system for processed e-mail.
•	Perform a first-pass scan of Inbox e-mail by subject line to immediately file or delete items that do not require an action on your part.
•	Decide how to act on each remaining message using the 3D Filter.

Module 3: Managing Your Calendar

This module teaches you how to make effective use of your time by using the Outlook Calendar. As an extension of the information flow of e-mail into tasks and appointments, the Calendar is a key component in effective workflow management. In this module, we will look at how to properly use the Calendar and when appointments should (and should not) be used.

Topics and Activities

•	Keyboard Shortcuts in the Outlook Calendar
•	Walkthrough 1: Creating an Effective Appointment
•	Exercise 1: Cleaning Up Your Calendar
•	Walkthrough 2: Creating Appointments from E-Mail
•	Exercise 2: Using Labels and Customizing Labels
•	Discussion: A Well-Organized Calendar

After completing this module, students will be able to:

•	Use navigational and functional keyboard shortcuts to work more efficiently in Outlook.
•	Create effective meeting requests and announcements.
•	Describe the difference between items that do and do not belong on the calendar.
•	Describe the purpose of appointments that you make with yourself.
•	Describe how e-mail, meetings, and tasks interrelate.
•	Create and maintain an efficient calendar organization system using categories and labels.

Module 4: Effective Use of Tasks

This module is based on the recognition that task management is a complex activity about which many schools of thought exist. In the context of Outlook and the approach this course takes focusing on “next actions”, the emphasis will be on generating tasks from incoming e-mail, understanding how to use Outlook categories and contacts as a filtering mechanism. The use of dated and undated tasks to achieve focus on the most important thing that needs to be done to move a particular project forward will be emphasized.

Topics and Activities

•	How to Use Tasks
•	Walkthrough 1: Creating a Custom View
•	Exercise: Creating and Applying Categories
•	Dated vs. Undated Tasks
•	Walkthrough 2: Creating Tasks
•	Discussion: The Role of Tasks

After completing this module, students will be able to:

•	Describe the difference between a task and a project.
•	Define and use custom views.
•	Assign categories to tasks and attach contacts.
•	Create task actions by including necessary information.
•	Understand when to use dated and undated tasks.
•	Create tasks.
•	Describe how e-mail messages, calendar items, and tasks flow together in a time- and task-management system.

Module 5: Setting Up the Outlook Dashboard

This module shows you how to set up the Outlook Dashboard. The Outlook Dashboard is a custom view, created in Outlook's Calendar module, which provides immediate access to the calendar, the Task Pad (set to display the day's tasks) and a view of the mail and folder hierarchy. This module will show you how to construct and customize an Outlook Dashboard that can be adapted to your unique needs and work style.

Topics and Activities

•	Introduction to the Dashboard
•	Walkthrough: Creating the Dashboard
•	Exercise 1: Using the TaskPad
•	Exercise 2: Configuring the TaskPad
•	Discussion: Outlook as a Time Management Tool

After completing this module, students will be able to:

•	Create a custom calendar view.
•	Organize access to multiple Outlook resources.
•	Use the TaskPad to create new tasks.
•	Configure the TaskPad display.
•	Use the Outlook Dashboard to access all of your commitments.