Hour 12

Working with Tasks and Notes

Two of Outlook's special items are tasks and notes. Both offer ways to help you organize and prioritize your work. Although tasks have a lot in common with appointments, they're distinctly different from appointments.

Outlook's notes are often underused and misunderstood. This hour teaches you more than you ever wanted to know about using Outlook's notes.

This hour covers

- Using tasks
- Using notes

By the end of the hour, you'll know how to create and use tasks and notes to their fullest.

Overview of Task Features

Use tasks to track events you need to do but not during a specific time period, such as 2 p.m. Tasks can be open-ended with no start or end date, or you can assign start and due dates.

Tasks are also useful for setting reminders for things that aren't necessarily tasks, but that you want to be reminded about. For example, I drag order confirmation or package tracking email messages to the Tasks folder and set a reminder time so that I know when packages are expected to arrive.

Configuring Task Options

There aren't many options you need to configure to use tasks, and the default settings are acceptable to most users.

If you'd like to look at the Task Options dialog, as shown in Figure 12.1, open it by selecting the Tools, Options, Preferences, Task Options menu option.

If Set Reminders on Tasks with Due Dates is enabled on the Task Options dialog, choose a Reminder Time setting on the Tools, Options, Preferences dialog.

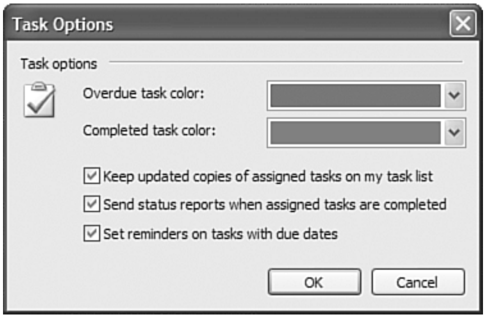


FIGURE 12.1
Use the Task Options dialog to choose an automatic formatting color of overdue and completed tasks, whether to use reminders on tasks with due dates, and how you want to handle assigned tasks.

In addition to setting a default reminder time in Tools, Options, you can choose a specific date and time for your reminder on the task form. These fields accept natural language entries.

Creating Tasks

Although some things can be entered as either calendar or task items, for the most part you'll want to create tasks for items that don't have a set time to be completed. You can set a due date or leave the task open-ended.

To open a task form, select New, Task or press the keyboard shortcut of Ctrl+Shift+K (see Figure 12.2).

You have to complete only the Subject field for your task and save it. But in most cases you'll also want to include a Due Date, and might want to include a Start Date and Reminder Time, or associate Contacts with the task, and assign Categories. As you work on the task, you can update the Status: and % Complete fields.

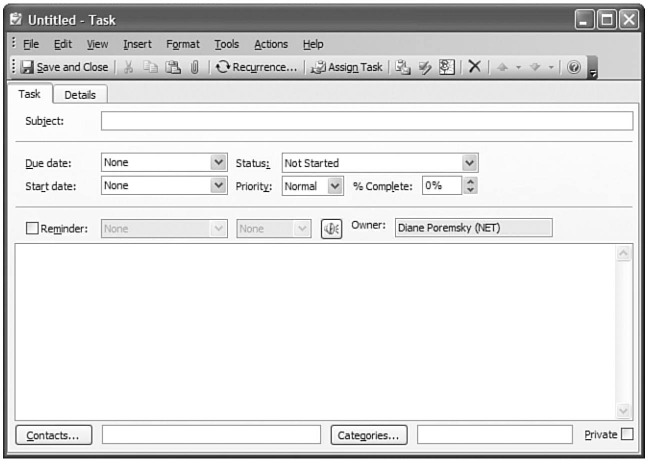


FIGURE 12.2
The task form needs only a few fields completed: Subject, Start and Due Dates, Status, % Complete and Reminder times. As you complete the task, you can change the % Complete and Status fields.

> When you enter a contact in the Contacts field, the task is included on the Activities tab of the contact.

You can create new tasks from email messages by dragging messages to the task button at the bottom of the Navigation Pane or to the Tasks folder. When a task is created from an email message, the Subject field is completed automatically (using the email's subject) and the message body is added to the Notes field.

If you'd rather have the message on the task as an attachment, right-click and drag the message to the Task button and then drop it. A menu opens with options for creating a new task using Copy Here As Task with Text, Copy Here As Task with Attachment, or Move Here As Task with Attachment.

In most cases, you'll want to create tasks from email with the message as text, not attachment, because it often results in a smaller file size and you can read the note in the preview pane.

However, if you're creating a task to remind you to reply to a message, adding the message as an attachment means that you can open the message right from the task—you don't have to go looking for it. Adding the message as an attachment also preserves the message source, including HTML formatting, the full Internet header, and any attachments sent with the message.

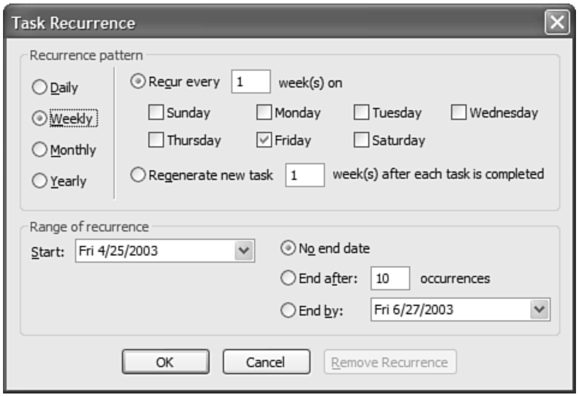
> You can also right-click on a message, choose Move to Folder, and selecting the Tasks folder from the folder list. This moves the message and creates a task with the message attached.

You can also create a new task by selecting and dragging text from any application to the Task icon to create a new task with the text entered into the Notes field automatically.

Use the Recurrence button to create recurring tasks (refer to Figure 12.2). Choose the recurrence pattern, the range of recurrence, and whether there is an end date (see Figure 12.3). Click the Remove Recurrence button if you want to remove the recurrence.

> When a task is recurring, the next occurrence doesn't start until the current one is marked complete.

FIGURE 12.3
Use the Task Recurrence dialog to create recurring tasks. Recurring tasks must fit a pattern; you are unable to use this dialog to create tasks that don't fit a pattern.



Click the speaker button following the reminder time fields to choose a specific reminder sound for the task. You can have a different reminder sound for each task if you desire. Select a sound from `C:\WINDOWS\Media\` or use sounds you get from other sources or programs.

> It's much easier to type the dates in the date and time fields than to use the date and time pickers when you know the shortcuts to use. Among the available shortcuts are 1d (for 1 day), 2w (for 2 weeks), 10a for 10 AM, and 235p for 2:35 PM. The date fields also accept natural language words, which

enables you to type such phrases as `next christmas`, `tomorrow`, and `week from friday` and have Outlook enter the correct date in the field. These fields are not case sensitive and you can use lowercase letters for holiday and day names, as I used in my examples.

Outlook can also complete the due date based on the start date, although it's clumsy because the Due Date field is first in the tab order. For example, to create a task that starts next Friday and is due 2 days later, enter **`next friday`** in the Start field, and then press Shift+Tab to return to the Due Date field and enter **`2d`**.

When you work on the task, you can change the % Complete field to reflect how much work you've done toward completing the task. Although it's not necessary when working tasks, if you're working on a shared task or were assigned a task by someone else, updating the % Complete field helps others gauge how much is left to do. The drop-down list includes 25, 50, 75, and 100, or you can type any whole number into the field.

You can also set a status for the task, choosing from

- Not Started
- In Progress
- Completed
- Waiting on Someone Else
- Deferred

When the % Complete field is changed and the Status: field is on the default of Not Started, the Status: updates to In Progress or Completed. Status selections are unchanged when another status is selected and the % Complete field is updated to anything except 100 % Complete, at which time the status changes to Completed.

Viewing Tasks

There are three ways you can view your tasks:

- In the Tasks folder (see Figure 12.4)
- Using the TaskPad in the Calendar folder
- On the Outlook Today page

As with all Outlook folders, you can create custom views for both the Tasks folder and the TaskPad.

The Tasks folder views can include any view type, including Timeline, Icon, or Day/Week/Month. Although you can't merge calendar and task items, you can create a Calendar view of your task items.

Enable the Current View section of the Navigation Pane using View, Arrange By, Show Views in Navigation Pane.

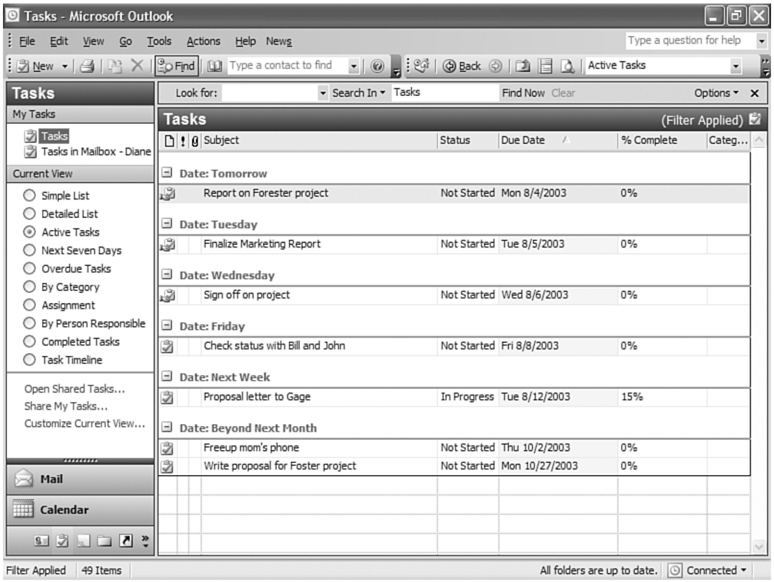


FIGURE 12.4
Use the Tasks folder to view your tasks. The Navigation Pane includes your task folders and you can show the View list in the pane. Icons identify recurring and assigned tasks.

Using the TaskPad with Calendar

Previous versions of Outlook included a TaskPad on the Calendar folder. Although it's no longer the default view, you can restore the view by pulling the right edge of the calendar toward the middle of the screen, moving it at least the width of a calendar thumbnail (see Figure 12.5). When the calendar thumbnails are visible above the TaskPad, the thumbnails on the Navigation Pane disappear. Slide the top border of the TaskPad up to hide the calendars on the right and restore them to the Navigation Pane.

Change the view used in the TaskPad by right-clicking on the row of field names. This brings up the standard view menu that's used in all folders, as shown in Figure 12.6. Use Customize Current View to create a filter for your tasks.

FIGURE 12.5
The calendar thumbnails are shown on the right side of the window instead of in the Navigation Pane when the TaskPad is enabled.

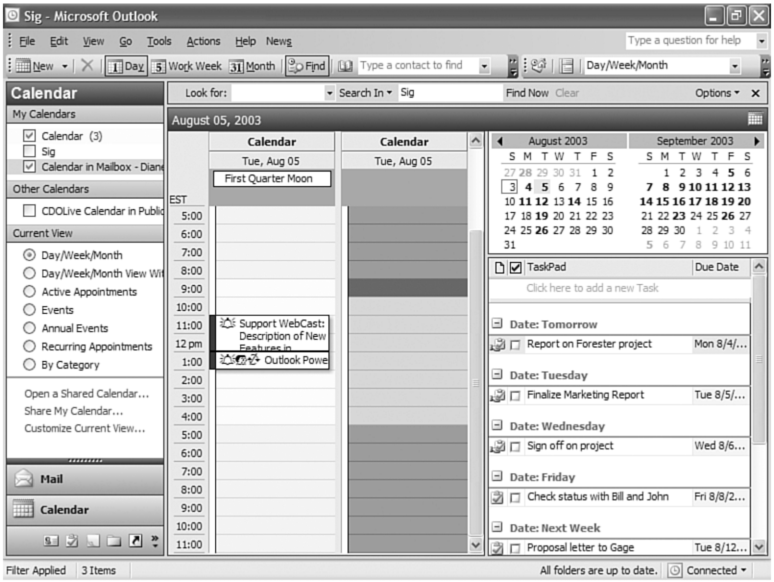
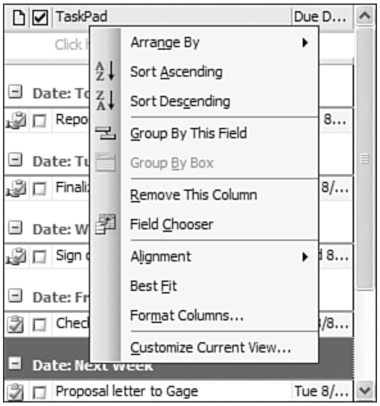
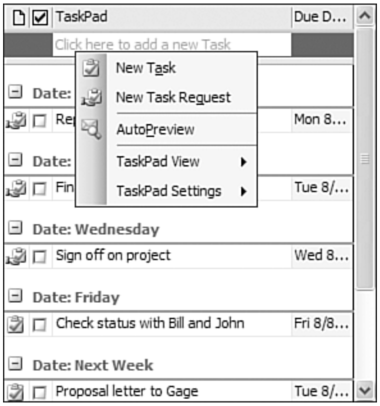


FIGURE 12.6
Right-click anywhere on the row of field names to change the view on your TaskPad.



When you right-click in the new item row, you have additional view options. The TaskPad View menu contains a list of six predefined views, including All Tasks, Today's Tasks, Active Tasks for Selected Days, and Overdue Tasks. You can also show or hide tasks that don't have due dates from this menu (see Figure 12.7) .

FIGURE 12.7
In addition to creating New Tasks and New Task Requests, you can enable the three-line AutoPreview on the TaskPad and change the current views on the TaskPad.



Assigning Tasks to Others

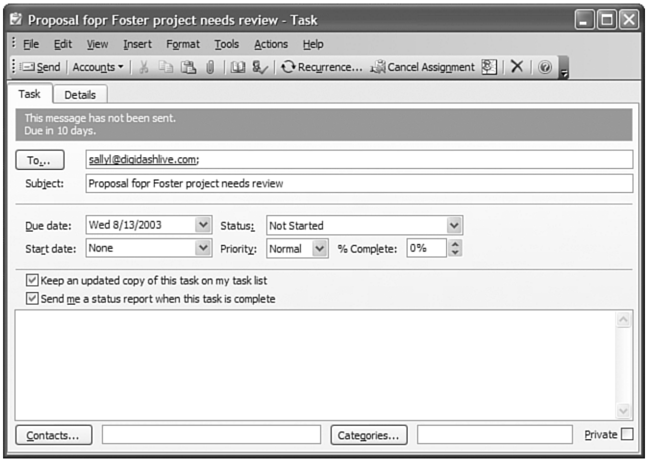
One nice feature of Outlook is the capability to assign tasks to others, sending them by email. Although it works best when everyone is using the same Exchange Server, anyone can use the feature. The person you assign the task to must also use Outlook (any version). You must send the task using RTF and when the recipient accepts it, it's added to that person's Tasks folder.

> Double-click on the recipient's name and select Send Using Outlook Rich Text Format in the Internet Format field to ensure that the task request is sent using RTF.

You can send a task request by opening the New menu and choosing Task Request or Ctrl+Shift+U (see Figure 12.8). If you have a task form open and decide to assign it to someone, click the Assign Task button on the form and the additional fields used in a task request are added to the form. If you change your mind, click the Cancel Assignment button and the fields are removed.

As the recipient updates the status of the task, updates are supposed to be sent back to you and the copy of the task in your Tasks folder will be updated if you enabled the options when you sent the task. Although that's how it's supposed to work, if both you and the recipient aren't using Exchange Server, many times the task updates are sent as plain-text messages, not RTF, and your copy of the task isn't updated automatically. Instead, you'll receive a message containing the task fields and you have to update the task status yourself.

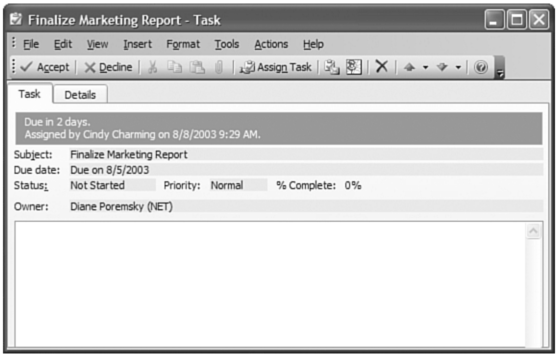
FIGURE 12.8
The task request form is nearly identical to the task form, with the addition of a To field and two check boxes for Keep an Updated Copy of This Task on My Task List and Send Me a Status Report When This Task Is Complete.



When you send a task to two or more people, your copy of the task won't be updated. Outlook warns you before you send the task that if updates are important, you can choose Cancel and remove all but one name.

When you're assigned a task, you'll receive a message similar to the one shown in Figure 12.9. You can accept or decline the task request from the Reading Pane or an open message. After making your selection, you'll be asked whether you want to send the response immediately or edit it first. When you select the Edit Comment option, the task form opens for you to add comments to the Notes field. The notes are saved in the copy in your Tasks folder and included in the response. After accepting the task, it's added to your Tasks folder.

FIGURE 12.9
Select the Accept or Decline button when you receive a task assignment.



Instead of accepting or declining a task, you can reassign it. Open the task assignment message and choose Assign Task instead of Accept or Decline. The task is added to your Tasks folder and is updated, but the originator's copy of the task is not updated.

Making the Most of Notes

Outlook's notes are useful for storing small pieces of text. You can add contacts or categories to your notes and locate the note quickly using Find. Because URLs in notes are clickable, you can paste a URL in a note and include comments about the site. You never have to remember to save notes; Outlook automatically saves them as soon as you move focus away from the note.

Notes resemble sticky notes and can be used to replace the paper version, but they lack a lot of functionality you would expect to find in onscreen sticky notes. That's not to say they aren't useful—they just don't have the features many people expect from electronic sticky notes.

Setting Note Options

The default font, note size, and default note color are set using the Tools, Options, Preferences, Notes Options dialog (see Figure 12.10). The font setting applies to all notes, including existing notes.

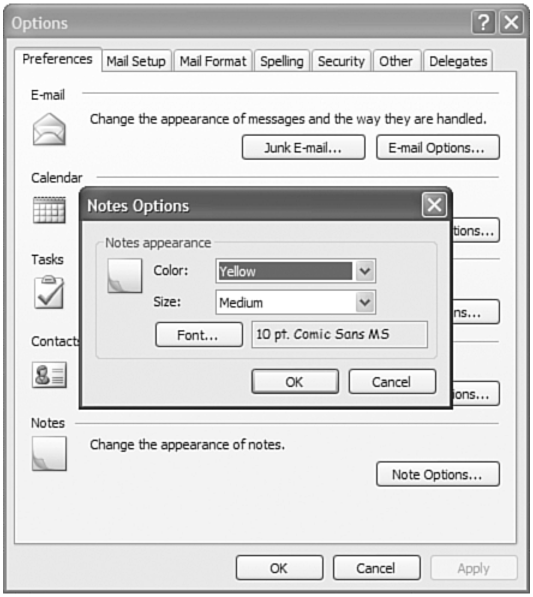


FIGURE 12.10
Use the Notes Options dialog to set the default size and color of your notes and the font. Note color and sizes can be changed when you create a note, but the font is the same for all notes.

> Because Notes uses a simple text editor that doesn't support rich text formatting, you can't highlight words or phrases with different colors or fonts or include images in a note.

Notes are yellow by default, with blue, green, pink, and white available as alternative colors. Note size and color changes apply only to new notes. The color and size of existing notes remains unchanged when you make changes to note preferences.

You can change the color of an individual note at any time. If the note is open, click on the note icon in the upper-left corner of a note and then choose Color from the menu. If a note is closed, right-click the note and choose Color.

> When you use the Group by Color view, you can drag notes between groups to change their color.

You can display the last modified time and date in the note's status bar. Turn it on with Tools, Options, Other, Advanced Options menu selection, check the box for When Viewing Notes, Show Time and Date. This is a global setting and applies to all notes. It uses the same short date format used by the computer.

The status bar displays the time and date the note was last modified. The Modified Time field is updated to the current time when you edit a note.

> If it's important for you to know the date a note was created, type the date in the note body—don't rely on the Created and Modified Date fields in Outlook.

Creating Notes

As with all Outlook items, there are several different ways to create new notes.

1. Use the mouse to select File, New, Note from the menu bar or New, Note from the Standard toolbar in Outlook's window. If you have the Notes folder open, the New button opens a new note by default. Or use the keyboard shortcut, Ctrl+Shift+N, to create new notes from anywhere in Outlook. Type or paste text into the note form.

When you use Word as your email editor, you can't use the keyboard shortcut or menus to create notes when composing a message. You must bring Outlook or an Outlook item into focus to use the keyboard shortcut.

2. Double-click between notes in the Notes list to open a new note (see Figure 12.11). If you use an Icon view, simply double-click between the icons or double-click after the last note in List view. The note is now ready for you to enter text.

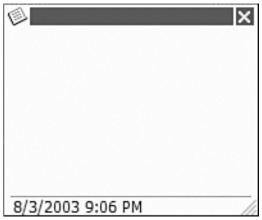


FIGURE 12.11
Outlook's note has a simple interface and no toolbar. Click on the small icon in the upper-left corner to access the options available for individual notes. This note has the date and time the note was created displayed in the status bar.

3. Drag and drop a message to a note folder to save the entire message as a note.
4. Select part of a message and drag the selection to a note folder. You aren't limited to dragging selections from Outlook items; this works for any OLE document, such as Word documents, Excel spreadsheets, and Internet Explorer pages.

Outlook uses the first line of the note for the name of the note. The maximum length for the name is 256 characters, unless you begin a new paragraph. If you want a shorter name, press Enter to begin a new line.

When you drag Outlook items to create notes, drop the text or message on the Note icon at the bottom of the Navigation Pane, on a note folder, or anywhere in the list area.

When you're done creating your note, you can use the Escape key or Alt+F4 to close it.

Assigning Categories to Notes

Although you can't see a Category field on a note form, you can assign categories to notes. When you use categories, you can use the Group By Category view, display the Category field in the Notes List view, or use Advanced Find to find your notes.

There are three ways you can add a category to notes:

- Click on the Note icon in the upper-left corner and select Categories from the menu to display the familiar Outlook Categories dialog.
- Right-click on a note in the folder and choose Categories.
- Turn on in-cell editing and type a category name in List view. In-cell editing is enabled from the View, Arrange By, Custom menu selection, and clicking the Other Settings button.

> You can assign a category to several notes at once. After selecting the notes, right-click on the selection and choose Categories. You can also use the Group By Category view and drag notes to category groups.

Assigning Contacts to Notes

You can assign contacts to a note and the note will be listed on the Activities tab of the contact with other Outlook items. I'm not sure how useful it is to associate sticky notes with contacts, but it's an option if you ever need it.

As with categories, the Contact field is not visible on the note form, and the only way to add a contact is by clicking the Note icon and selecting Contacts from the menu.

> In-cell editing makes it easy to edit items, but many people don't like the feature and worry about accidentally editing a field. This isn't a problem with Notes because Category is the only Notes field that is editable in-cell.
>
> If you want to use in-cell editing but don't want it enabled all the time, create a new view with it enabled. When you want to edit a note, switch to your new view. It's easy to switch views when you show the Advanced toolbar.

Saving Notes

Outlook automatically saves your notes to the default Notes folder when you close the note or focus is no longer on the note.

When you use the File menu or keyboard shortcut to create a note, it's saved in the default Notes folder. If you want to save a note in another note folder, you must open that folder, create the note, or move it from the default Notes folder after it's created.

You can use the mouse to move or copy notes to another note folder. Drag and drop with the left mouse button to move the note, or use a right-click drag and drop to select between Move or Copy.

When you select two or more notes and right-click, one of the menu options is Move to Folder. Selecting this option opens the Move Items dialog; select the folder to move the notes to.

You can save contents of a note to the Windows file system as notes, RTF documents, Outlook templates, or text files.

> Instead of copying the content of a large note and pasting it into a document, you can save the note as an RTF file type and open it in a word processor.

Outlook provides two print styles you can use—Table Style and Memo Style—for printing copies of your notes (see Figure 12.12). Use Table style to print a list of your notes or Memo style to print individual notes. For most views, you'll choose your print style; however, Icon view supports Memo Style only.

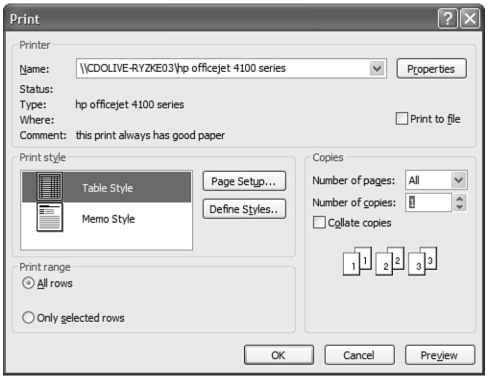


FIGURE 12.12
Notes' Print dialog has two print styles to choose from when you're using a Table view.

Memo style prints just one note per page. When the notes are short, use the Table style to print your notes on one page. This style offers limited configuration settings beyond the type of paper used.

When a Table Style printout is selected, the printout contains all the fields exactly as they're seen on the screen, including AutoPreview, if enabled. Notes that contain fewer than 256 characters of text might print in their entirety when AutoPreview is enabled.

Emailing Notes

It's easy to send your notes to other people: just drag and drop the note on the Inbox or any mail folder. A new message form opens with the text of the note in the body of the message. The first line of the note is used for the subject and the note's last modified date is added to the message.

When you select multiple notes and drop them on the Inbox, one message is created with the contents of the notes in the message body. The subject field is left blank.

You can send notes as attachments, too. If you've already started an email message, choose the Insert File, Item toolbar selection when using Word as your editor or Insert, Item menu with the Outlook editor, browse to the Notes folder, and select the note. When you select the note first, you can use Ctrl+F, or right-click and choose Forward Note.

Organizing Your Notes

After you create many notes, you need to organize them, either using folders or views. In some cases, creating additional note folders makes sense, but you can create custom views to show certain notes. If you get in the habit of using note colors to categorize notes, a simple By Color view might be all you need to be organized.

Outlook includes several predefined views:

- Icon; choose from Small Icons, Large Icons, or List
- Notes list; similar to the view used in the Inbox
- Last Seven Days
- By Category
- By Color

You can customize these views or create new custom views (see Figure 12.13). Right-click on the row of field names to access the Customize Current View dialog or define new views using View, Arrange By, Current View, Define View. When using Icon view, right-click in any open space and select Customize Current View.

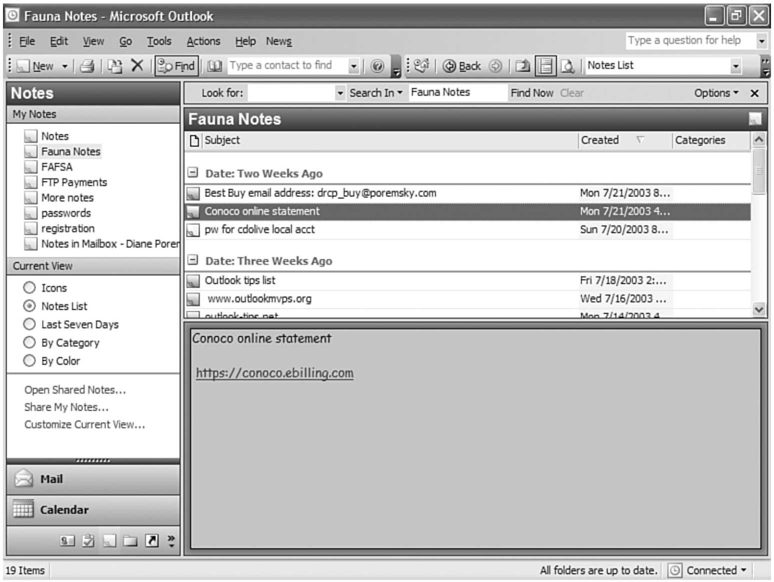


FIGURE 12.13
This view uses the Notes List view with the notes grouped by date. Shared Notes is available for Exchange server users only.

Keyboard Shortcuts

Many users, myself included, use the mouse for everything—sometimes out of habit and others times because it's the only way we know how to access the features. Using the keyboard is faster because you don't need to remove your hands from the keyboard and it's well worth the effort to learn the keyboard shortcuts. Many of these shortcuts work with the other Outlook items, so you need to learn only one set of shortcuts.

Table 12.1 lists the keyboard shortcuts you'll use with Outlook's notes.

TABLE 12.1 Keyboard Shortcuts You'll Find Useful When Working with Notes

Keystroke	*Action*
Shift+Ctrl+N	New note
Ctrl+N	New note when Outlook is opened to the Notes folder
Escape	Close open note
Ctrl+D	Delete open note
Ctrl+D or Delete key	Delete selected note from list view
Ctrl+E	Center text
Ctrl+R	Block text right
Ctrl+L	Return to left block

Keystroke	*Action*
Ctrl+I	Insert tab
Ctrl+F	Forward selected note using email
Ctrl+P	Print
Ctrl+S	Save
Shift+Ctrl+V	Move selected note to new folder
Shift+Ctrl+F	Advanced Find

Summary

This hour showed you how to use tasks and notes. You learned how to use tasks, assign tasks to others, and how to view your own tasks. You also learned how to use the features that notes have and how to use notes more effectively.

Q&A

Q The large note is too small. Can I change its size?

A The size of the small, medium, and large default note size is hard-coded and can't be changed. However, you can drag the edges of individual notes to resize them. Because the size and screen position are persistent, the note will open at your custom size or shape and in the same location the next time you open it.

Other options available to you include double-clicking the title of a note to resize it to full-screen size. Double-click the note a second time to return it to its original size. If you save a note as a template, notes created from the template are the size of the note that was used for the template.

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Q I dropped an email in Notes and can only see the beginning of the message. I don't have scrollbars. How can I read the entire note?

A As you've discovered, the note form doesn't have scrollbars. There are at least three ways you can read the entire message, though. I prefer to drag the sides of the note and make it large enough so that the entire note is visible. When a note is resized and then closed, the size is remembered and it will always open at the new size.

If you want the note to stay small, you can double-click on the title bar to maximize the note, and then double-click it again to restore the note's size.

If you really want to scroll the note, use the arrow keys or the Page Up and Page Down keys to move around the note. If you want to use your mouse, you must select some text and scroll to select the rest of the message.

Q I emailed some tasks home and received them as messages with the task details in it, not a task form.

A When you email tasks—especially when you're sending the task to an Internet email account—you need to ensure that RTF formatting is enabled for the recipient's address. When Outlook sends RTF, it converts the message to HTML format to ensure compatibility with all email programs; however, converting the message to HTML also converts tasks and other Outlook forms to normal messages.

Double-click on the address in the To field and select Send using Rich Text Format in the Internet format field of Internet Properties. If a contact form opens, double-click again in the E-mail Address field to open the Internet Properties dialog.