

Technical Setup Instructions For Microsoft Outlook for Mac

Create Lists in Tasks Using Categories

1. Open Outlook for Mac Tasks. You will see one task folder called Tasks. This is a great list for mind clearing items that you have not processed yet. We don't suggest this Tasks list as your only list because you will quickly outgrow it. We recommend creating 6 key lists described in the following steps.
2. Click on New Items > Folder. We will use folders as specific task lists, which will also sync to Microsoft To Do app on your mobile device and to Outlook.com.
3. Double click on the new folder just created (which will be called Untitled Folder) and rename it Meaningful Objectives.
4. Repeat steps 2-3 for the remaining folders:
 - Supporting Projects
 - SNA To-Do
 - SNA Waiting For
 - 1:1 [Meetings/Person]
 - Someday Maybe

Note: SNA stands for "strategic next action." You will likely have several 1:1 lists, for people or teams you meet with regularly.

Create a New Task

1. Go to the task list (one of the folders you just created) where you want to add a task. Be sure no other lists are also checked, or it will add the new task to all.
2. Click on the New Task icon in the top left corner of Outlook, or use the keyboard shortcut ⌘N.
3. In the New Task field, enter the description for your task.
4. Add a due date if there is one.
5. Click Save & Close when done. Your task is saved in the list (folder) you are viewing. If you saved it to the wrong folder, simply drag and drop the task to the correct folder.

Note: If you create a new Task from email, calendar, or contacts using the New Task button in the top left of Outlook, it will save the task to the default list called Tasks. Then you will need to drag and drop it to the correct folder.

Turning an Email into a New Task

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 large green + sign. If you don't see the menu with Message as an option, 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. Click Save & Close.
5. Your task is saved in the list (folder) you are viewing. If you saved it to the wrong folder, simply drag and drop the task to the correct folder.
6. Go back to Mail and file if you need the original email or delete it.

Note: Emails can also be turned into meetings or appointments. Simply click Message > Create and choose the option or drag the email to the calendar icon in the bottom left corner.

Turn Off Email Notifications

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:

- Daily Tasks List view in your calendar to view due items
- To-Do Bar in your calendar to view Tasks
- Creating a new Task with the email as an attachment
- Conditional Formatting colors in email or calendar
- Customizing the Tasks view
- Quick Steps
- Quick Parts
- Opening to Calendar as default
- Extensive preferences and options
- Universal shortcut keys for new email and new task (only ⌘ N, which works in current view only)