

**Excerpt from Michael Linenberger's
Total Workday Control Using Microsoft Outlook
3rd. Edition (released March 2011)**

MYN Quick Start

Before plunging into the main lessons in this book, Windows Outlook users should consider using this optional Quick Start section to get going with the Master Your Now (MYN) system right away. Here, in about 15 minutes, you will learn an abbreviated version of the system – enough to give you an immediate solution for many of your current workday-control issues.

Macintosh users, my apologies; due to the design of the Outlook 2011 tasks system, there are no easy quick steps for you. Instead, please go directly to the Introduction or to Lesson 1.

Finding Your Windows Outlook Version Year

The steps in this Quick Start vary depending on your version year of Outlook. The Quick Start covers 2003, 2007, and 2010. Here's how to find your version.

First, if you have a large set of tabbed icons at the top of your Outlook window with these tab names: File, Send/Receive, Folder, and more, then you are using Outlook 2010; that's Microsoft's latest version of Outlook for the PC (as of this writing).

If instead you see a set of menu names at the top labeled File, Edit, View, and more, then there's one more step to determine the version. Click on the Help menu, and choose the About Microsoft Office Outlook menu item; then look at the date at the very top of the small window that opens. That date is your version year; you are looking for either 2003 or 2007. Eligible versions are discussed more in Lesson 2.

A video version of this Quick Start is also available at the following links:

- ▶ For Outlook 2007 or Outlook 2010, go to: www.myn.bz/QS-2007-10.htm
- ▶ For Outlook 2003 go to: www.myn.bz/QS-2003.htm

The MYN Task List in Outlook

The central tool in the MYN system is the MYN task list, which is a powerful control panel for managing your work. In this Quick Start, you are going to create a simplified version of the MYN task list. I also call this list the Workday Mastery To-Do List; it's the same thing.

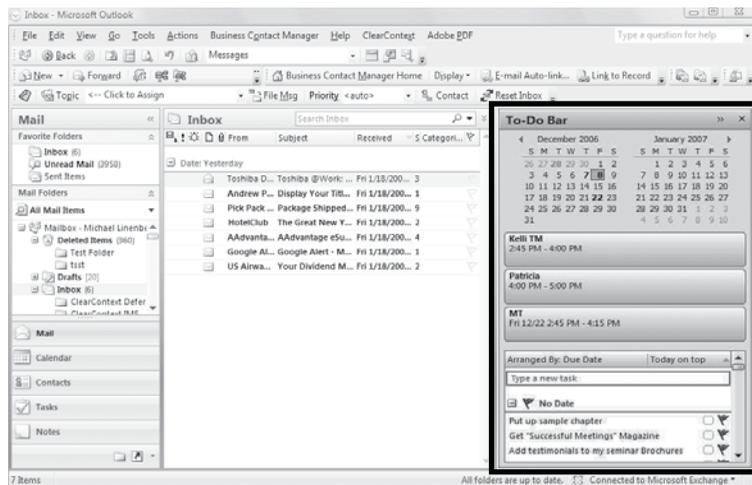
As a first step, let me show you the task area in Outlook that you're going to work with to create the task list. Note, you're *not* going to use Outlook's main tasks folder yet; rather you're going to use a smaller task list that is more convenient. Where you find that smaller task list depends on your Outlook version.

Outlook 2007 and 2010

In Outlook 2007 and 2010, the task list to use for MYN is the one in the To-Do Bar. The To-Do Bar is a large pane that usually (but not always) occupies the right side of your Outlook window. You can recognize it by the mini-calendars at its top (see Figure 1). If you don't see it on the right side of your screen (or are not sure), go to your View menu or tab, choose To-Do Bar, and then choose Normal from the submenu – that will open it. Note that the To-Do Bar has a list area at the bottom – that's the task list we're going to modify for use in MYN.

The first modification is this: if the task list is too short, as in Figure 1, right-click the very top of the To-Do Bar, just above the mini-calendars, and clear the check mark next to the Date Navigator. That will make the task list bigger. If your To-Do Bar seems too narrow, drag the left edge to make it wider.

Figure 1
The To-Do Bar (2007/10) occupies the right side of the Outlook window.



To make this task list into a Quick Start version of the MYN task list, I recommend that next you clear any view settings you may have applied to this To-Do Bar task list—so we can start with a clean slate and so the settings below will work. Here’s how. At the top of that list, right-click the header phrase Arranged By (or Arrange By, or Task Subject). In the resulting shortcut menu, choose Custom... or Customize Current View... or View Settings... (you will see one of those three). Then, in the dialog box that opens, click the button in the lower left corner that says Reset Current View. If that button is dimmed, your settings are already in default mode and you need to do nothing. In either case, click OK to close that window.

Now, the next step—the only real MYN setting you need to make in this Quick Start—is simple. Just left-click (normal-click) the Arrange By (or Arranged By) label at the top of the task list, and, from the shortcut menu, select Importance. That’s it!

Look at your task list; it may be currently empty, or it may have a few tasks, or may have tens or hundreds of tasks listed in there. If it has lots of tasks—tasks that you may not remember entering—they are probably virtual copies of old mail that you flagged in the past. Outlook displays flagged mail here to remind you that they may need action. If there are lots of them, you should clean this list up by removing flags from that old mail. You can do that now or wait till Lesson 2 where I’ll show you how to clean those out in bulk. Also, ignore the red color you might see on tasks—we’ll fix that in Lesson 3.

At this point, Outlook 2007 and 2010 users can jump to the section farther below called Adding Tasks to Your Task List.

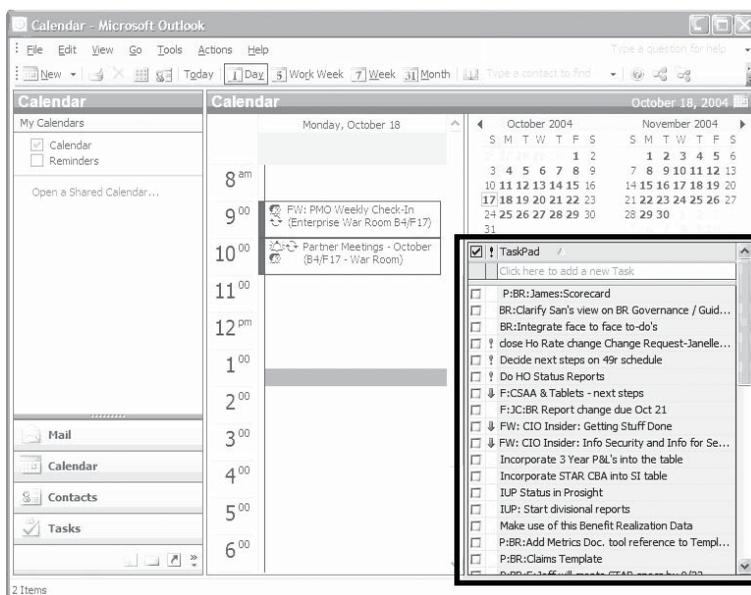
Outlook 2003

In Outlook 2003 the task list we are going to use is in an optional pane called the TaskPad. It’s only visible in the Calendar view, so navigate to your Calendar view now by clicking the word Calendar in the lower left-hand corner of your Outlook window. Next, look on the right side of the Calendar window to see if you have that pane—one that shows a list area with one or more mini-calendars at above it—it’s labeled TaskPad (see Figure 2). If you do not see that pane, then from the View menu, choose TaskPad; that should open it. If that does not open it, then skip ahead to Lesson 2 and find the section called Five Ways to Find a Hidden TaskPad; use those instructions to reveal it.

Next, if the TaskPad is very narrow, grab the left edge of it and drag it to the left an inch or two so that it is wide enough to work with easily. It widens in jumps, so drag the mouse a full inch or two to get it to open more.

Let’s set the TaskPad up for MYN. To do that, find the word TaskPad at the top of the list and right-click it. From the very bottom of the shortcut menu that opens, choose the item labeled Customize Current View.... Then, in the window that opens, I recommend you click the button in the lower left corner that is labeled Reset Current View; this is to clear any settings you may have

Figure 2
The TaskPad (2003) occupies the lower right corner of the default Calendar folder view.



applied to the current TaskPad task list (perhaps without knowing you did that). If that button is dimmed then your settings are already in default mode and you need to do nothing.

Next, click the Fields... button at the top left. In the Show Fields dialog box that opens you should see three fields listed on the right. In the scrolling list on the left, select Priority and click the Add-> button in the middle so that Priority gets added to the list at right. Then drag that Priority item up or down within that list so that it is the second item from the bottom, just above Subject. Make any other adjustments needed to create these field names in this order: Icon, Complete, Priority, and Subject. Click OK, and then OK again.

Back at the TaskPad, you'll now see a black exclamation point in the header at the top of the task list. Right-click it and from the shortcut menu choose Group By This Field. After that, any tasks in your TaskPad will be grouped by priority (High, Normal, and Low). If you do not have tasks, you'll see no groups yet – but next we'll add some tasks so you can. Ignore the red color you might see on any previously existing tasks – we'll fix that in Lesson 3.

Adding Tasks to Your Task List

For all versions, to enter a task, just type in the row near the top of the list – it's labeled Type a New Task. After you type a task name, press the ENTER key, and the task will drop into your task list into the top of the group labeled Normal. You have just entered your first task; congratulations!

Next, make sure you have at least a few tasks in each of the three priority groups (High, Normal, and Low). So, enter more tasks and set a few at each

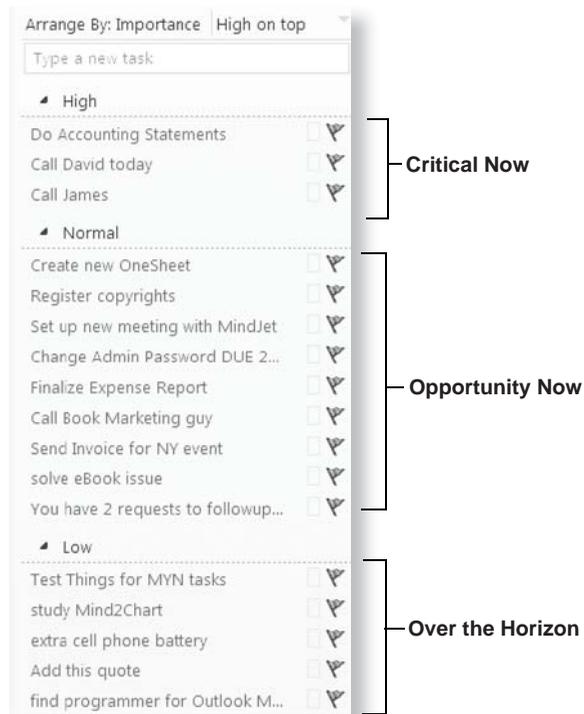
priority level. Here's how to set the priority: After you create a task, double-click it in the list and, in the middle of the dialog box that opens, you'll see the Priority drop-down menu; set it there. Ignore the date fields and other controls; we'll talk about start dates, due dates, and much more in later lessons. Click Save & Close in the upper left corner of the task dialog box.

Using the MYN Urgency Zones

Now you are ready to apply a few MYN principles. Once you have a few tasks entered at each of the three levels, you'll clearly see the three priority-labeled groups in your task list (see Figure 3). These three groups correspond to three *urgency zones* in the MYN tasks system. The key teaching of MYN is that tasks in each urgency zone require a different level of attention. If you place tasks in the correct zones and then apply your work intensity appropriately, you'll greatly reduce your stress level and you'll get your tasks well under control. Let's see how to do that.

The first urgency zone is called *Critical Now*, and we'll use the High priority group in your task list for these (see top of Figure 3). These are tasks that are absolutely due today. You should list tasks here only if they are so critical for today that you would work late into the evening were they not complete; you should have no more than five tasks here each day, hopefully fewer. You'll

Figure 3
The Quick Start version
of the MYN Tasks List
(Outlook 2010 shown;
other versions similar)



xxx Total Workday Control Using Microsoft Outlook

want to check this list often, perhaps even once per hour, to see what might get you in trouble (or keep you late at work) if not completed by end of day. It is very refreshing to have this list clearly delineated and well controlled.

By the way, make sure the High priority group is always at the top of your task list. If the entire group is at the bottom, you can fix that as follows: In 2003 click the black exclamation point at the left end of the task list header; in 2007/10 click the small arrow (triangle) at the right end of the header.

The next urgency zone is called Opportunity Now, and this corresponds to the Normal priority group in your task list (see middle of Figure 3). Place tasks here that you would work on today *if you had the opportunity*, but that you could let slide up to ten days or so. Plan to review this complete list at least once per day to see if anything there has jumped in importance and needs to be done today. The main rule here is this: you should have no more than about 20 items in this list. If you have more than 20, drag the lowest priority items to the third zone, covered next.

The third and final urgency zone is called Over the Horizon, and it corresponds to the Low priority group in your task list (see bottom of Figure 3). Place tasks here that you can ignore for longer than ten days; perhaps much longer. Then plan to review this list *once per week*; I recommend every Monday morning – but the actual day is up to you. If on review anything looks like it has become more important, drag that item to one of the higher priorities.

Converting E-mail to Tasks

To avoid losing tasks in your Inbox, and to keep the Inbox under control, do this: When you get an e-mail that has an action for you to do, drag that e-mail from the Inbox list and drop it on top of the Tasks icon at the bottom left of the Outlook window; that icon looks like a clipboard with a check mark in it. When you drop it there, a task window will pop open (like the one you saw earlier when you double-clicked a task). Immediately change the subject line to be the task action and set the priority level as appropriate; ignore the dates and other controls and click the Save and Close button on the task. You'll see it appear in your MYN task list. Then work these in priority order off your task list – don't try to use your Inbox as a task management system.

Converting e-mails to tasks like this is very important; it prevents you from losing important action requests, it enables you to work incoming requests in priority order, and it allows you to file mail out of your Inbox more easily.

Next Steps

That's it – that's the most critical portion of the system in a nutshell. If you like, use this for a while before proceeding with the rest of the book; put all your tasks in this task list using the urgency zone rules described above to sort tasks into each priority. And don't forget, allow no more than five tasks

in High and no more than twenty in Normal – everything else goes into Low. Then, start reviewing each section of the list as I instructed above – check the High-priority section once an hour; Normal once a day; and Low once a week. Use this as your single place to look for everything you do. Once you start using this regularly, you'll feel the stress draining off your day and you will come to realize you now have all major things under control.

Obviously, the configurations and principles above represent only a small portion of what you'll learn in the rest of the book. So when ready, read the Introduction and then move to Lesson 1, which will help you understand the urgency-zone theory behind the MYN system.