

# Mg for Outlook

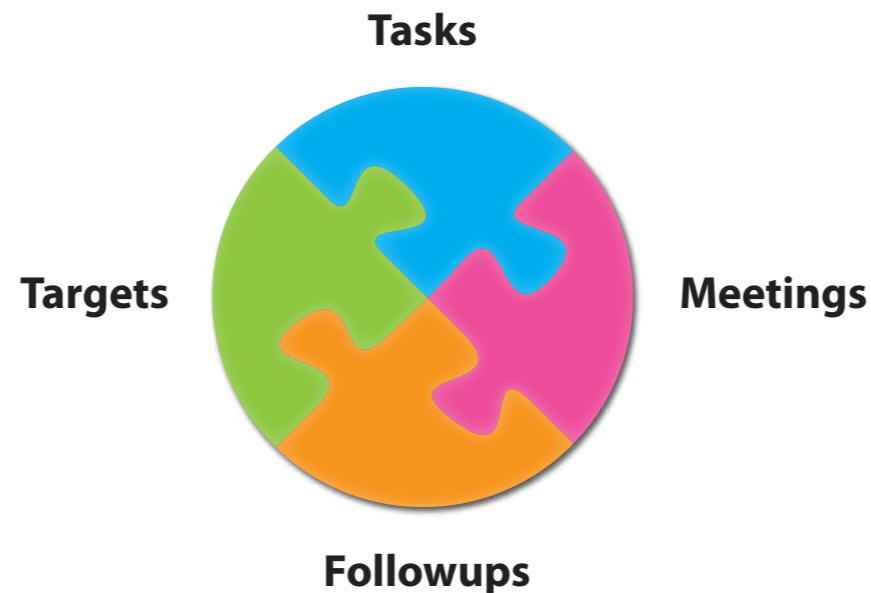
Installation and User Manual

Version 1.1

Last reviewed: January 2011

# What is Mg?

- Tool that helps you manage your everyday tasks and meetings
- Mg connects tasks and meetings together



# Why use Mg?

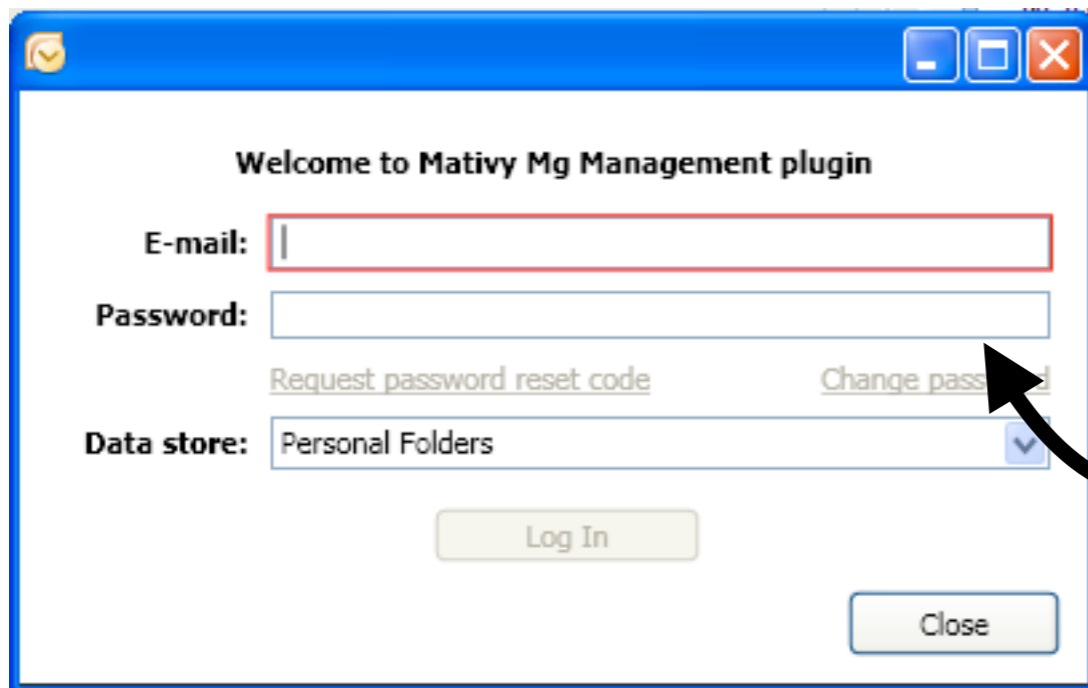
- Keep track of your opens tasks
- See status of tasks that you delegated
- Assemble agenda for meetings quickly
- Record meeting notes and distribute tasks during meetings
- Quickly followup with tasks in follow-up meeting

# Installation

1. Close Outlook
2. Run **setup.exe**
3. Press **Next** every time you're prompted
4. You're ready. Start Outlook.

# Login

- After you run Mg for first time, you'll be prompted to enter e-mail and password that you received in invitation e-mail.



Welcome to Mativy Mg Management plugin

E-mail:

Password:

[Request password reset code](#) [Change password](#)

Data store:

Managing Director has created a new Mg productivity account for you

MG Notification [mg67@mativy.com]

Sent: *tor* 23.11.2010 15:08

To:

Hi [frankbaker@](#)

Managing Director has just sent you a task that is stored inside Mg Productivity server that helps manage tasks, meetings and deadlines.

[Learn more about how Mg helps Managing be more productive.](#)

Your account data:

Username: [frankbaker@](#)

Password: **07cac6b8-929e-476e-9b43-6548ed887030**

There are two ways to manage your tasks:

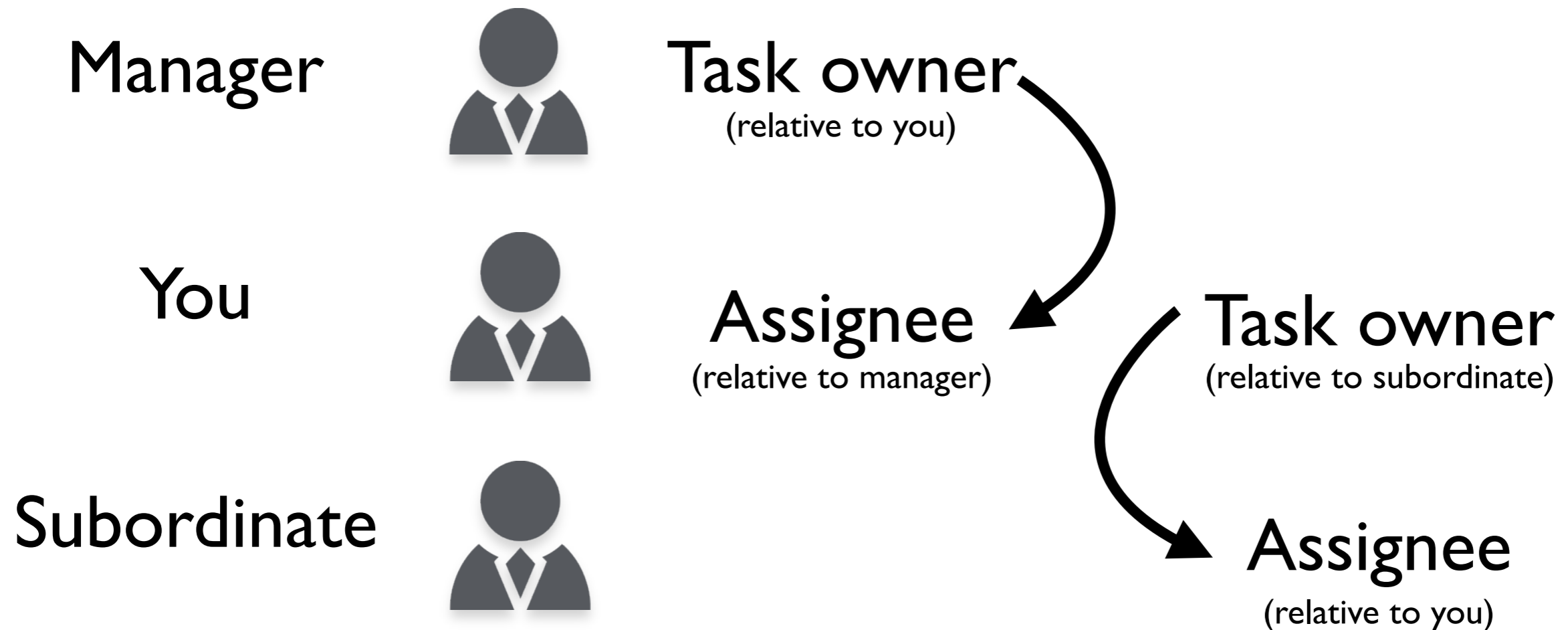
1. Microsoft Outlook plugin for Mg Productivity Server. Requires Microsoft Outlook 2007.  
[Download plugin](#)
2. Using Email commands:  
To **commit** to the task, reply to this email with: **commit**  
To **defer** the task, reply to this email with: **defer [date] [reason]**  
*Example: defer 23/11/2010 I'm away on holidays*  
To **complete** the task reply to this email: **complete**  
To **cancel** the task reply to this email: **cancel**

You can manage your MG notifications from your personal settings.

Visit our homepage at <http://www.mativy.com>

For inquiries email at [info@mativy.com](mailto:info@mativy.com)

# A bit of Terminology



- This guide is written from your perspective

# Start using Mg

**Select Mg Taskboard in your personal folders list**

**New Mg task by Managing Director: Defer with split 3 levels 2. Try**  
MG Notification [mg67@mativy.com]  
Sent: Sun 11/7/2010 4:55 PM  
To: td2@mativy.com

Qualityv.

has just assigned you a

**levels 2. Try**

board to manage the task  
ls in email subject or

body:  
To **commit** to the task, reply to this email with: **commit**  
To **defer** the task, reply to this email with: **defer [date] [reason]**  
Example: *defer 23/11/2010 I'm away on holidays*

You can manage your MG notifications from your personal settings.

Visit our homepage at <http://www.mativy.com>

For inquiries email at [info@mativy.com](mailto:info@mativy.com)

From	Subject	Received	Size	Categories
MG Notific...	New Mg task by Managing Director: defer 2nd level	Tue 11/9/2010...	6 KB	
MG Notific...	New Mg task by Managing Director: dsgfds	Mon 11/8/201...	5 KB	
MG Notific...	New Mg task by Managing Director: eki neki	Mon 11/8/201...	6 KB	
td1	Test for meeting	Sun 11/7/2010...	7 KB	
td1	Test for meeting	Sun 11/7/2010...	7 KB	
td1	Test for meeting	Sun 11/7/2010...	5 KB	
MG Notific...	New Mg task by Managing Director: Task to be split during mee...	Sun 11/7/2010...	6 KB	
MG Notific...	New Mg task by Managing Director: Task deferred	Sun 11/7/2010...	6 KB	
MG Notific...	New Mg task by Managing Director: Task to be completed by o...	Sun 11/7/2010...	5 KB	
MG Notific...	New Mg task by Managing Director: Task delegated to be reassi...	Sun 11/7/2010...	6 KB	
MG Notific...	New Mg task by Managing Director: Defer with split 3 levels 2. Try	Sun 11/7/2010...	6 KB	
MG Notific...	New Mg task by Managing Director: Defer 3 levels with split	Sun 11/7/2010...	6 KB	
MG Notific...	New Mg task by Managing Director: *parent	Fri 11/5/2010 ...	6 KB	
MG Notific...	New Mg task by Managing Director: *Test Split Delegate	Thu 11/4/2010...	6 KB	

# Basic structure

The screenshot shows the Microsoft Outlook interface with the Mg TaskBoard add-in. The interface is divided into several sections:

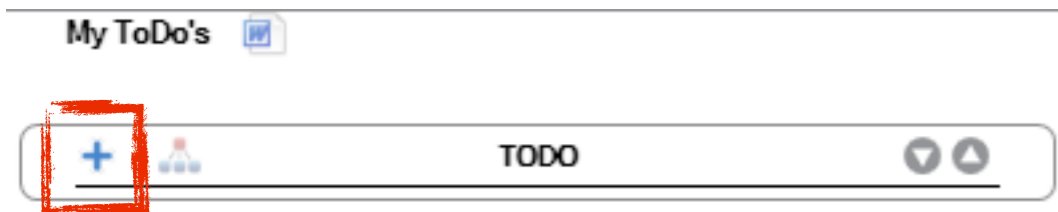
- Incoming tasks:** A section at the top showing tasks assigned to the user. An example task is "Lightbird project budget" assigned to "Quality Director" with a due date of 10/19/10.
- Your tasks:** A central section showing tasks assigned to the user. It includes a "TODO" list with tasks like "Report about effect of Utility corrective measures" and "Prepare a HR fluctuation report", and a "Delegate" section with a task "Integrate QA 2301 standard best practices".
- Delegated tasks:** A section at the bottom showing tasks assigned to other users. Examples include "Shareholders meeting agenda" assigned to "Vice President" and "\*Prepare a HR fluctuation report" assigned to "Finance Director".
- Task info:** A right-hand pane providing details for the selected task, including "Overview", "Transitions", and "Notes".

Annotations are placed over the interface to highlight these sections:

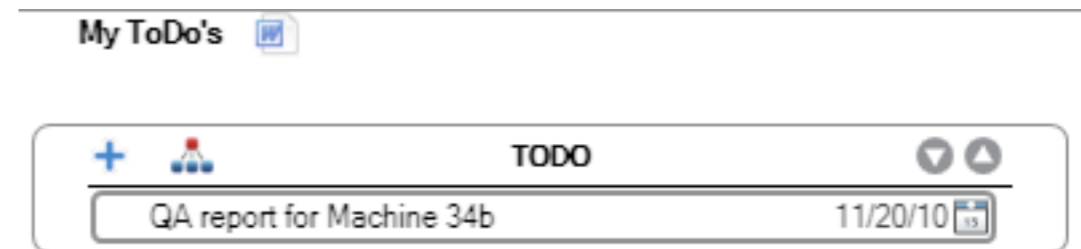
- A box labeled "Incoming tasks" is placed over the top section.
- A box labeled "Your tasks" is placed over the central section.
- A box labeled "Task info" is placed over the right-hand pane.
- A box labeled "Delegated tasks" is placed over the bottom section.

# Creating tasks

- Good tasks have
  - clear description
  - due date

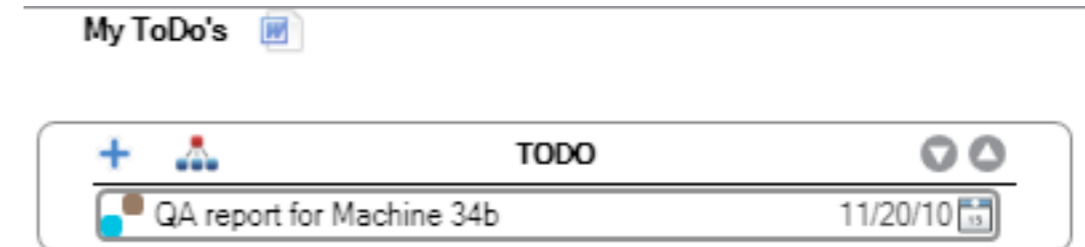
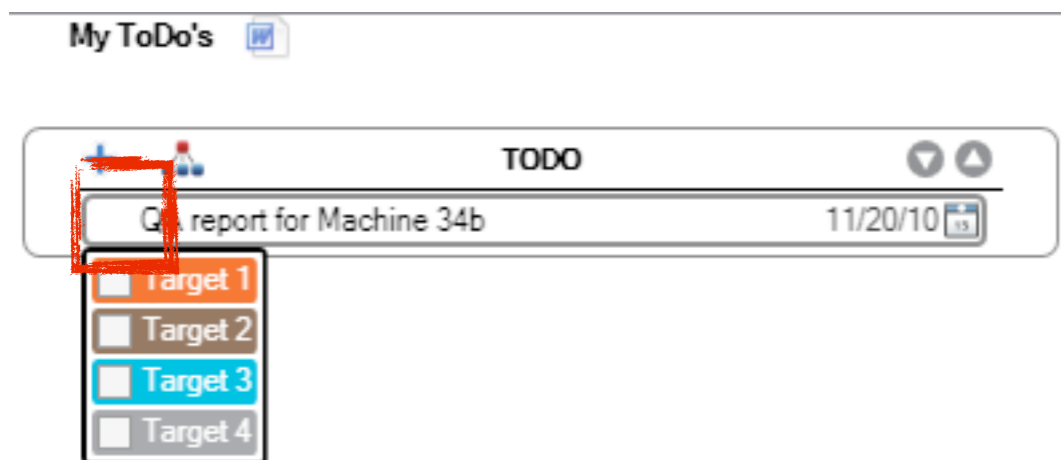


Create new task



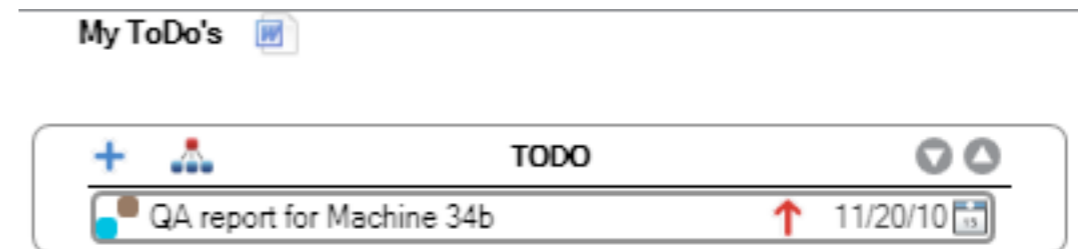
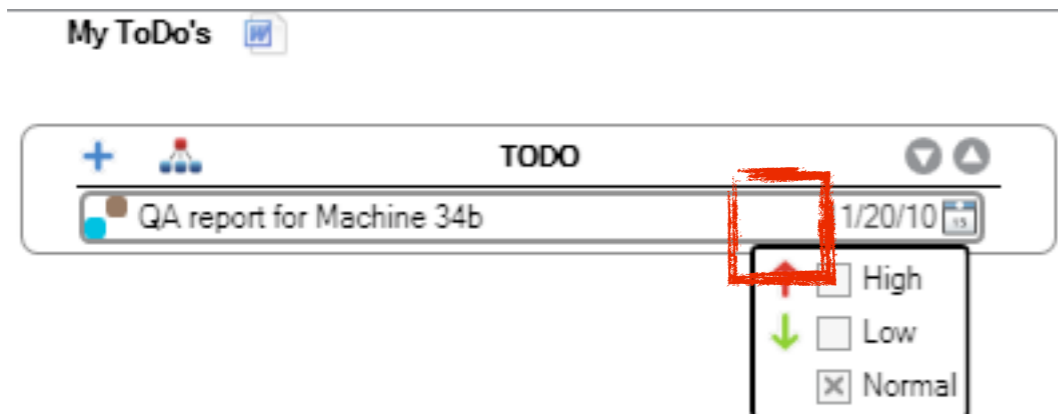
# Targets

- Each task can have company specific targets.
- This allows your coworkers to understand why it's being done.



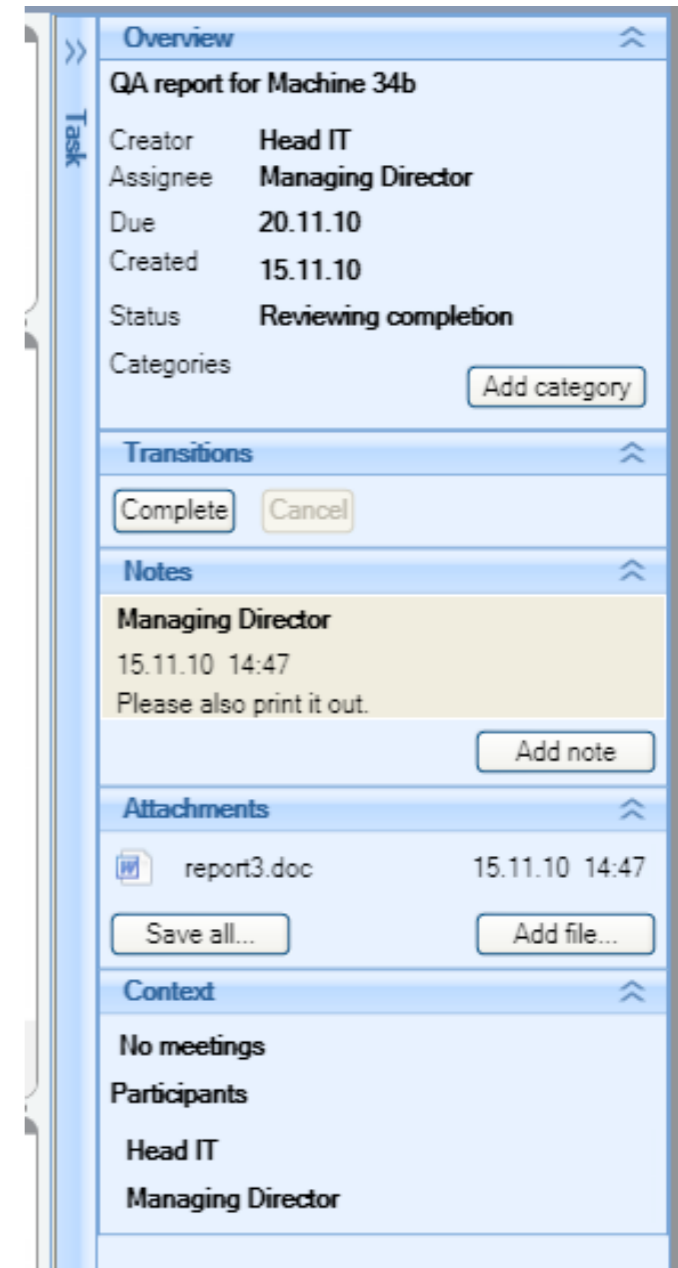
# Priority

- You can set task priority



# Task sidebar

- use sidebar to
  - attach notes to tasks
  - attach files to tasks
  - see who's connected to task (through delegations)
  - see related meeting minutes



# Delegating tasks

- Now that have created your first task, it's time to delegate it to someone.

The screenshot displays a task management interface with two main sections: 'My ToDo's' and 'Outgoing'.

- My ToDo's:** Contains a 'TODO' list with the task 'QA report for Machine 34b' (due 11/20/10) and a 'Mark for delegation' section with the task 'Integrate QA 2301 standard best practices' (due 10/19/10). A green box highlights the 'Delegate' button and the delegation task.
- Outgoing:** Contains the task 'QA report for Machine 34b' (due 11/20/10) under the 'Assign' section. A green box highlights this task.

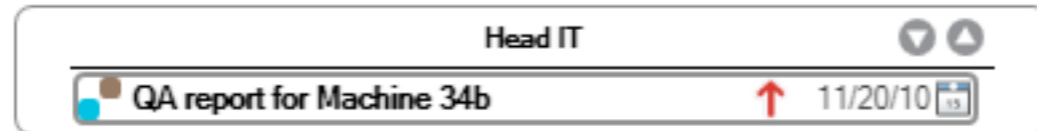
A black arrow points from the 'QA report for Machine 34b' task in the 'My ToDo's' section to the 'QA report for Machine 34b' task in the 'Outgoing' section. A text box on the right contains the instruction: 'Drag and drop your task'.

At the bottom, there are filters for roles: Vice President (3), Finance Director (1), Production Director (1), and Quality Director (4).

# Delegating tasks (2)

- You have just delegated your task.

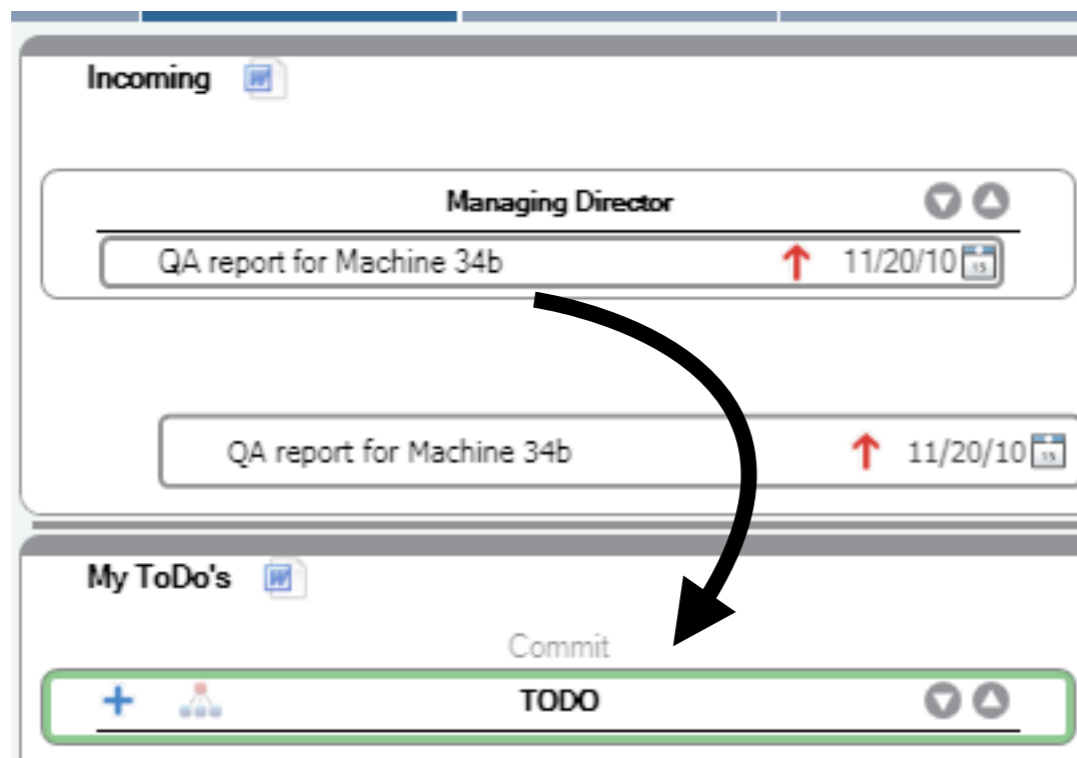
Outgoing 



- Now let's take a look at what the person at the other side sees.

# Accepting tasks

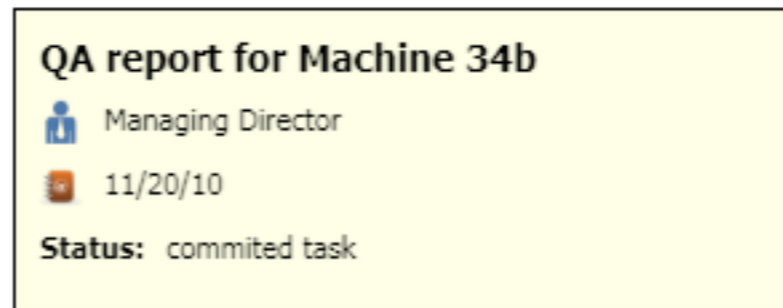
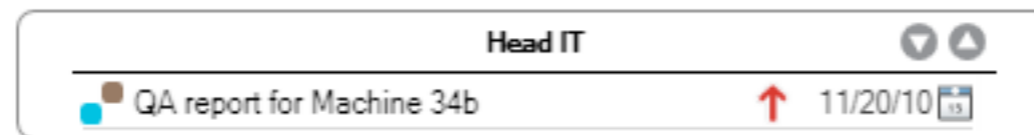
- When someone delegates you a task, it appears in your incoming panel.
- To commit to it, drag it into your ToDo.



Drag and drop  
your task

# Delegation notes

- You can further delegate a task that was delegated to you
- Use popup to check the status of your delegated task



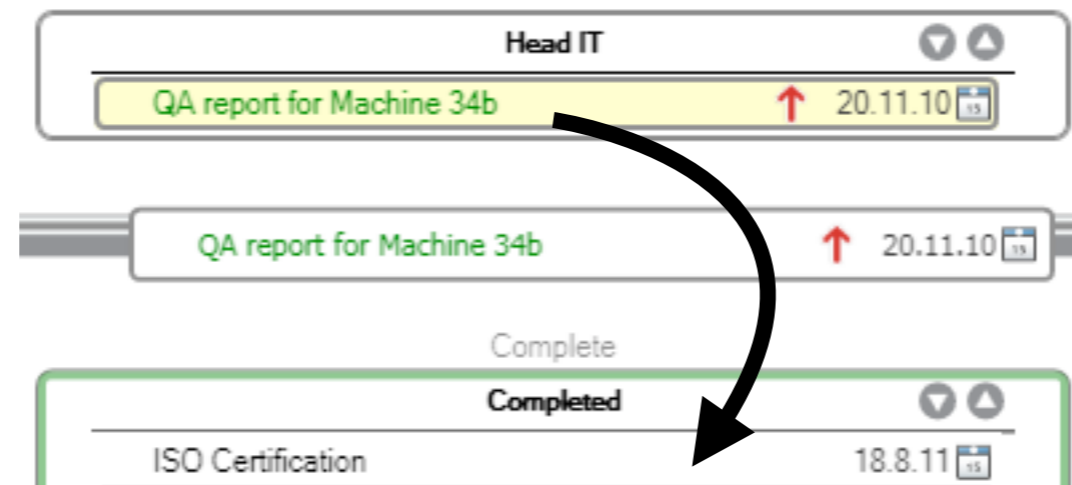
# Completing a task

- Once you complete a task, you drag and drop it into Complete.
- If you are owner of task, then the task is complete
- If the task was delegated to you, task owner can now review task.



# Reviewing completion request

- As your delegated tasks get completed, you'll want to review them.
- To complete tasks, drag them into Complete. To signal that it needs more work, delegate them again.



# That's it for the basics!

- Now you know how to create, assign and review tasks by using simple drag and drop operations.
- It's now time to take a look at more powerful feature: defer cycle.

# What's defer cycle?

- Efficient task execution requires that everyone involved (e.g. you and your boss) commits to the task and agrees what the task is and when it's due.
- Defer cycle is a way for you to indicate that you'd like to modify task, e.g. extend due date for a couple more days.

# Defer cycle

- Let's say you want to change due date. You would drag and drop the task into Defer.



- Dialog will open asking you about requested task changes.

A screenshot of a 'Defer' dialog box. The dialog has a title bar 'Defer'. Inside, it shows the following information:

- Task owner: Managing Director
- Task: QA report for Machine 34b
- Due Date: 24.11.10 (with a calendar icon)
- Priority: High (with a dropdown arrow)
- Note: I need a few more days, due to missing reports from contractors.

At the bottom, there are three buttons: 'I am not responsible', 'OK', and 'Cancel'.

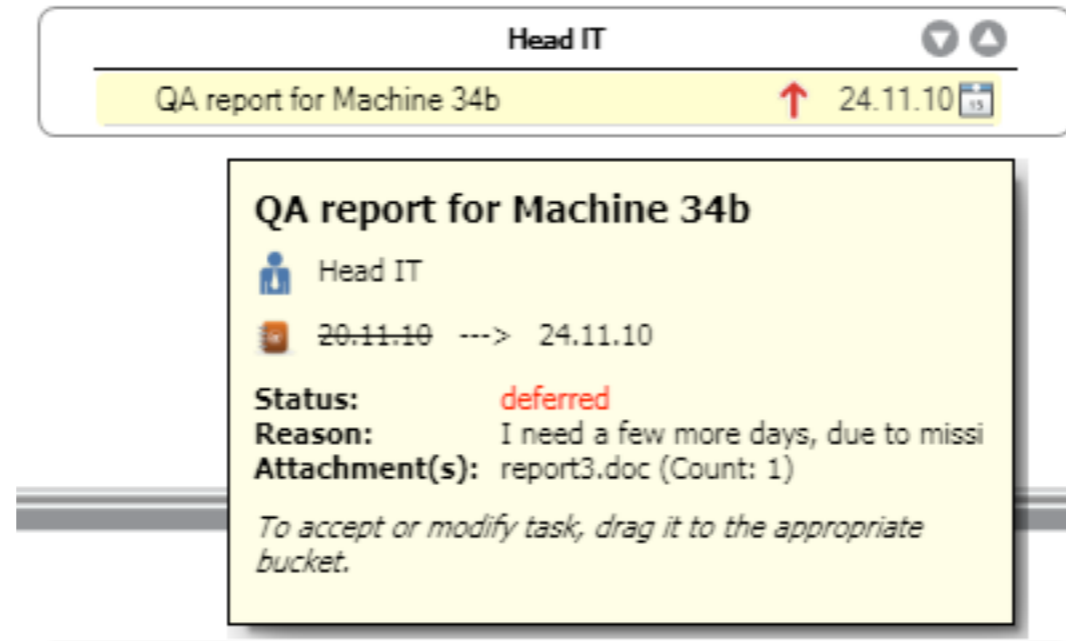
# Defer cycle (2)

- Since defer doesn't stop execution, you still keep task with original information inside your ToDo



# Defer cycle (3)

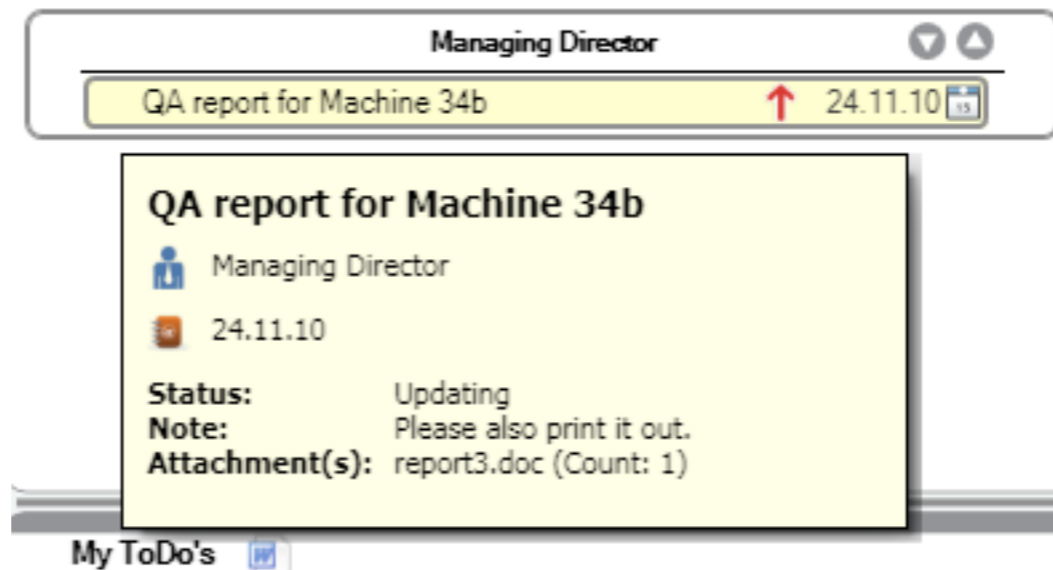
- Task owner receives information about defer request inside their incoming panel.



- To accept defer, merge it with delegated task. Otherwise modify defer in your ToDo and then merge it with the delegated task.

# Defer cycle (4)

- Reviewed deferred task is once again visible in your incoming panel. Merge it with your ToDo to update your task.



# Possible statuses for ToDo

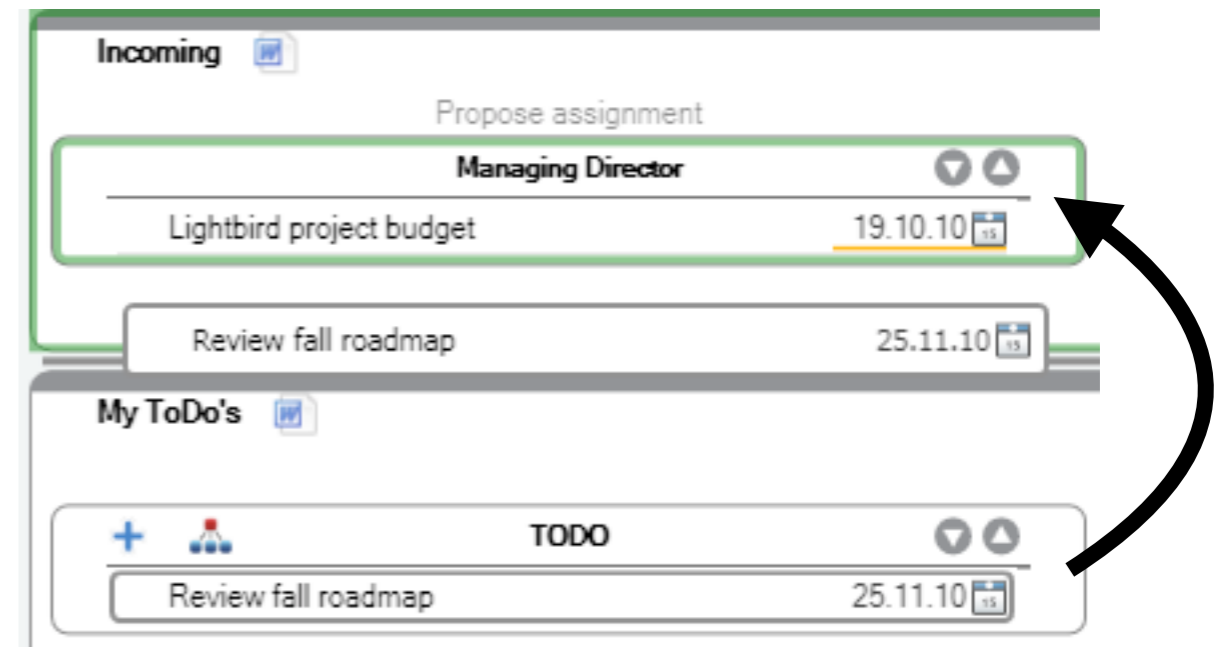
- Besides ToDo, Defer and Completed, there are also other options:
- Canceled - tasks that were canceled
- Wait - tasks without due date
- Delegate - tasks you want to delegate further, but haven't got around to it yet

# Propose task

- Often you want to record a task in Mg that someone delegated to you verbally. To accomplish this in Mg, you propose a task.
- With task proposal, you transfer task ownership to the person that you're proposing task to. The task is automatically delegated to you, so you can start working on it.

# Propose action (2)

- Propose action by dragging task into Incoming.



- You can then drag task back to your Todo and it's going to behave like delegated task.

# Propose action (3)

- Your manager can modify the task or accept it as it is and confirm it by merging it with the corresponding outgoing task.

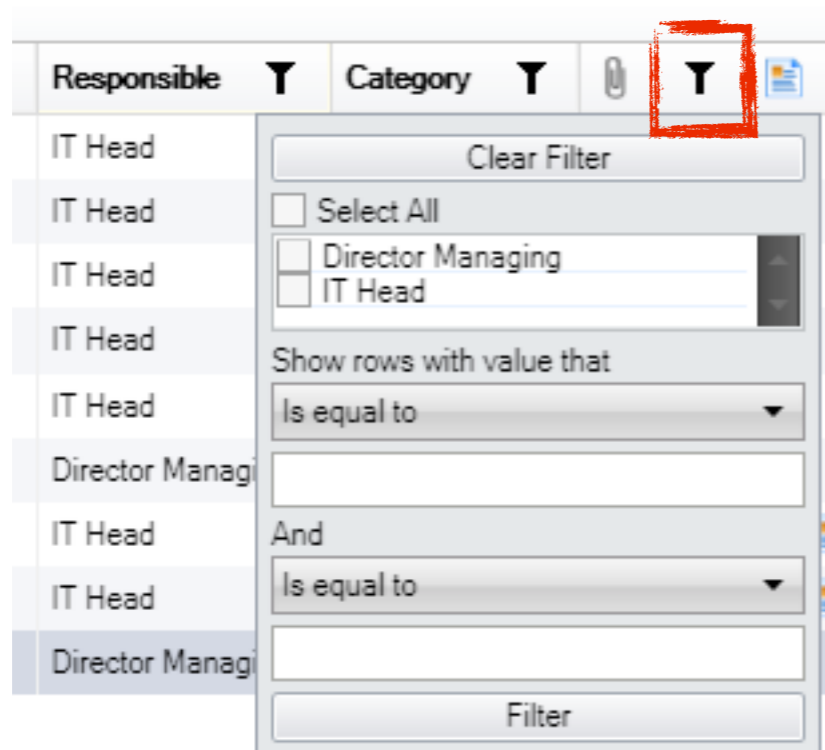
The screenshot displays a task management interface with several sections:

- Head IT:** A task card for "Review fall roadmap" with a due date of 11/25/10.
- My ToDo's:** A section containing a "Commit" button and a "TODO" card.
- Task Status:** A row of buttons for "Defer (0)", "Completed (6)", and "Canceled (9)".
- Outgoing:** A task card for "Review fall roadmap" with a due date of 11/25/10.
- Merge:** A section containing a "Merge" button and a green-bordered card for "Head IT" with two tasks: "Lightbird project budget" (due 10/19/10) and "Review fall roadmap" (due 11/25/10).

A large black arrow points from the "Review fall roadmap" task in the "Head IT" section to the "Review fall roadmap" task in the "Merge" section, indicating the action of merging the task into the outgoing task.

# Task grid

- Use Filter sidebar for general filtering
- Filter any column or group columns



Responsible			
	Title	Due date	Priori_
▼ Director Managing			
▲ IT Head			
1	Lightbird project budget	19.10.10	

- Group by column

# Splitting task

- You'll often want to break the task into smaller, more manageable tasks that you can further delegate.
- Mg has built-in *split* functionality.

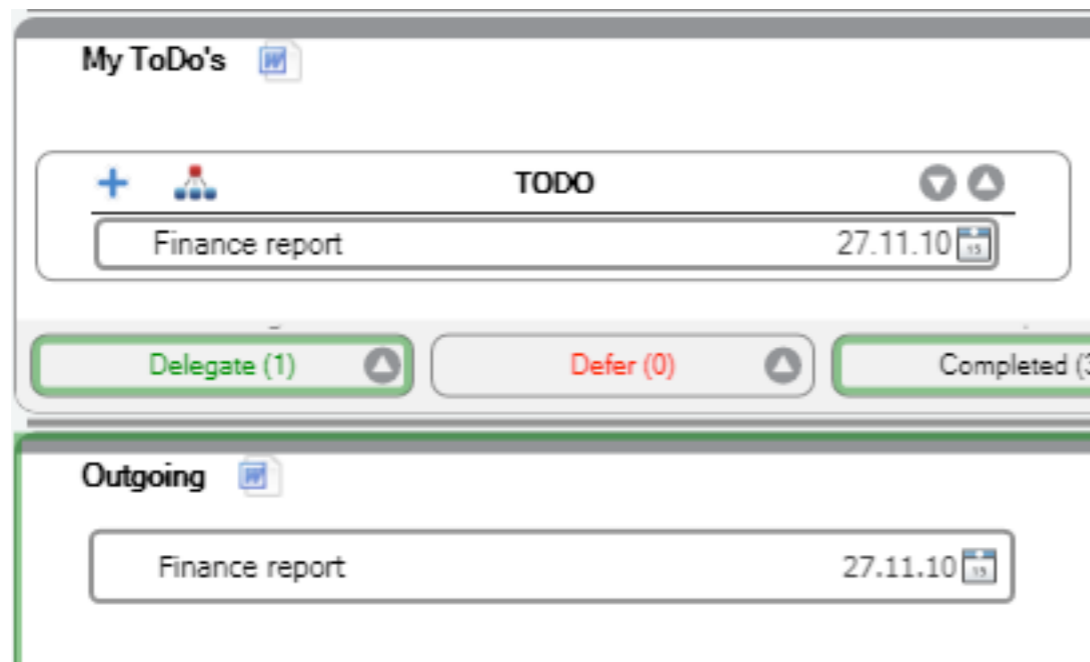


# Splitting task (2)

- Split tasks are prefixed with \*. You can rename them.
- Extra rules
  - Original task can't be delegated
  - Split task's due date can't be later than parent task's

# Inviting coworkers

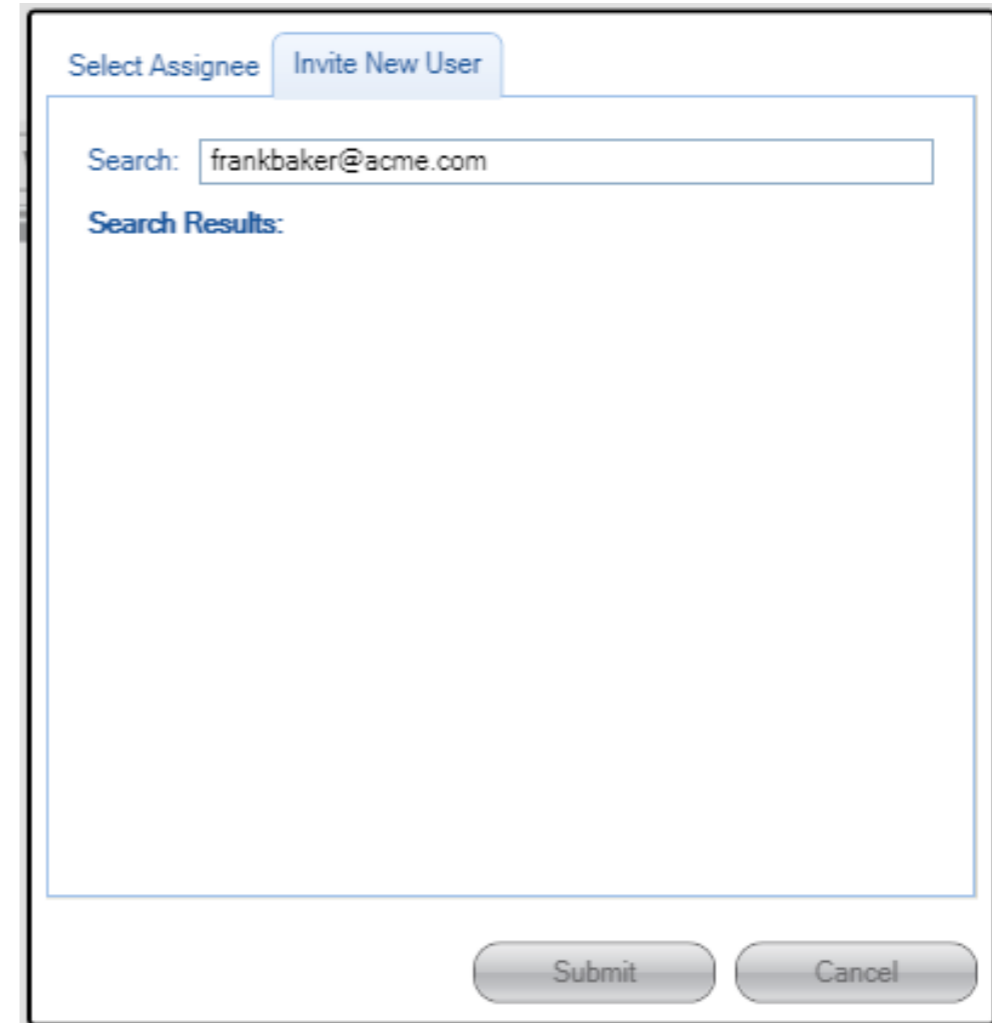
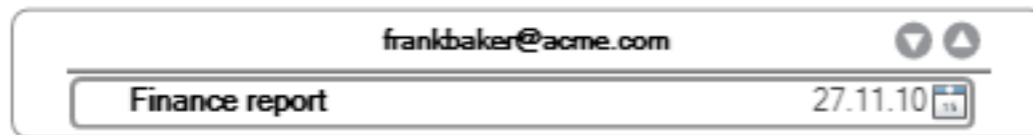
- If your coworker is not already using Mg, you can invite them by assigning a task to their e-mail



Drag to outgoing

# Inviting coworkers (2)

- Use Invite New User tab to enter e-mail of your coworker

A screenshot of a software dialog box. At the top, there are two tabs: "Select Assignee" and "Invite New User", with the latter being the active tab. Below the tabs is a search input field containing the text "frankbaker@acme.com". Underneath the search field, the text "Search Results:" is displayed. At the bottom right of the dialog box, there are two buttons: "Submit" and "Cancel".

# Inviting coworkers (3)

- Your coworker will get e-mail notification about the assigned task. They can use described e-mail commands to manage task.

**New Mg task by Managing Director: Finance report**

MG Notification [mg67@mativy.com]

Sent: *tor 23.11.2010 15:08*

To:

---

[frankbaker@](#)

Managing Director has just assigned you **a new task**:

**Finance report**

Due: **26.11.10**

Visit your Mg dashboard to manage the task or use email controls in email subject or body:

To **commit** to the task, reply to this email with: **commit**

To **defer** the task, reply to this email with: **defer [date] [reason]**

*Example: defer 23/11/2010 I'm away on holidays*

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You can manage your MG notifications from your personal settings.

Visit our homepage at <http://www.mativy.com>

For inquiries email at [info@mativy.com](mailto:info@mativy.com)

# Inviting coworkers

- Mg will also send them instructions how to download and setup their Outlook.

**Managing Director has created a new Mg productivity account for you**

MG Notification [mg67@mativy.com]

Sent: *tor 23.11.2010 15:08*

To:

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Hi [frankbaker@](#)

Managing Director has just sent you a task that is stored inside Mg Productivity server that helps manage tasks, meetings and deadlines.

[Learn more about how Mg helps Managing be more productive.](#)

Your account data:

Username: [frankbaker@](#)

Password: **07cac6b8-929e-476e-9b43-6548ed887030**

There are two ways to manage your tasks:

1. Microsoft Outlook plugin for Mg Productivity Server. Requires Microsoft Outlook 2007.  
[Download plugin](#)
2. Using Email commands:  
To **commit** to the task, reply to this email with: **commit**  
To **defer** the task, reply to this email with: **defer [date] [reason]**  
*Example: defer 23/11/2010 I'm away on holidays*  
To **complete** the task reply to this email: **complete**  
To **cancel** the task reply to this email: **cancel**

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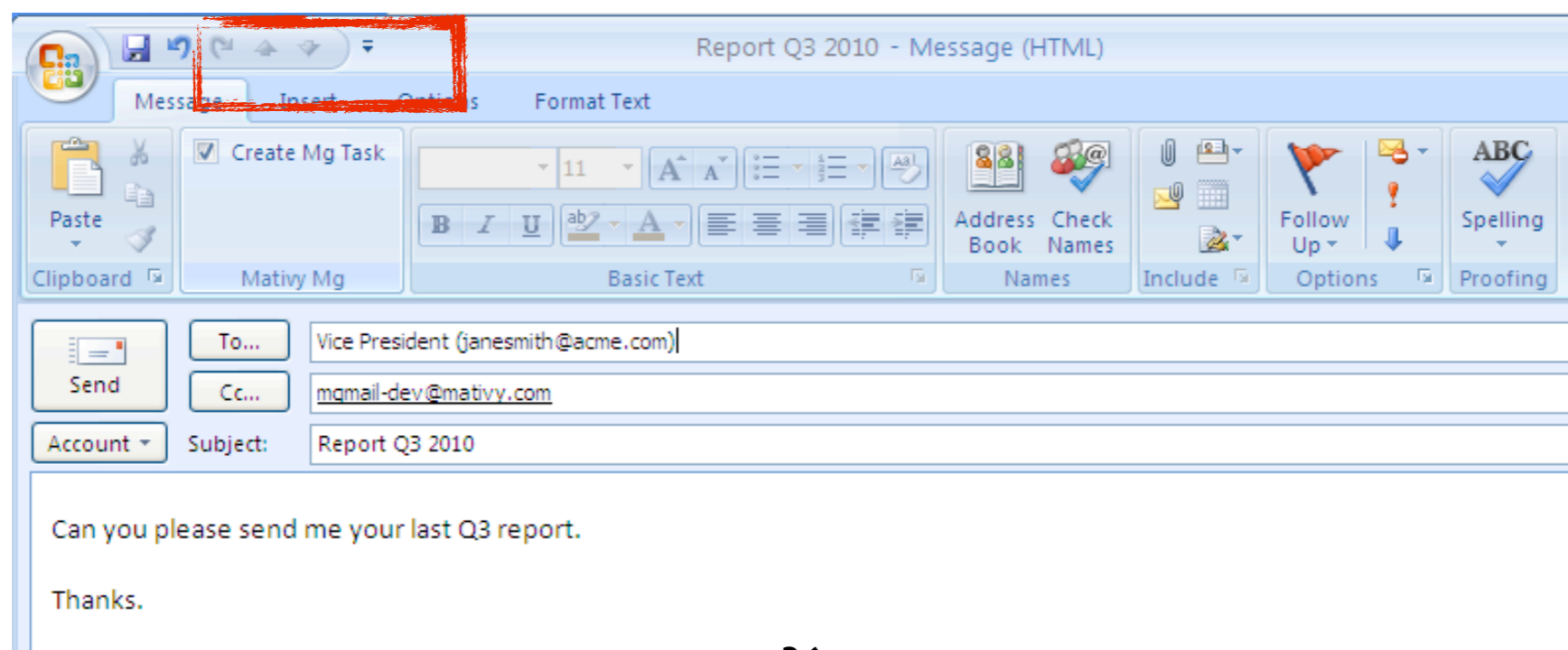
You can manage your MG notifications from your personal settings.

Visit our homepage at <http://www.mativy.com>

For inquiries email at [info@mativy.com](mailto:info@mativy.com)

# Create a task with e-mail

- When composing e-mail, tick 'Create Mg Task' checkbox. This will automatically delegate the task to recipient.
- E-mail body will be added as a task note.
- E-mail attachments are added as task attachments.



# That's it for Task board

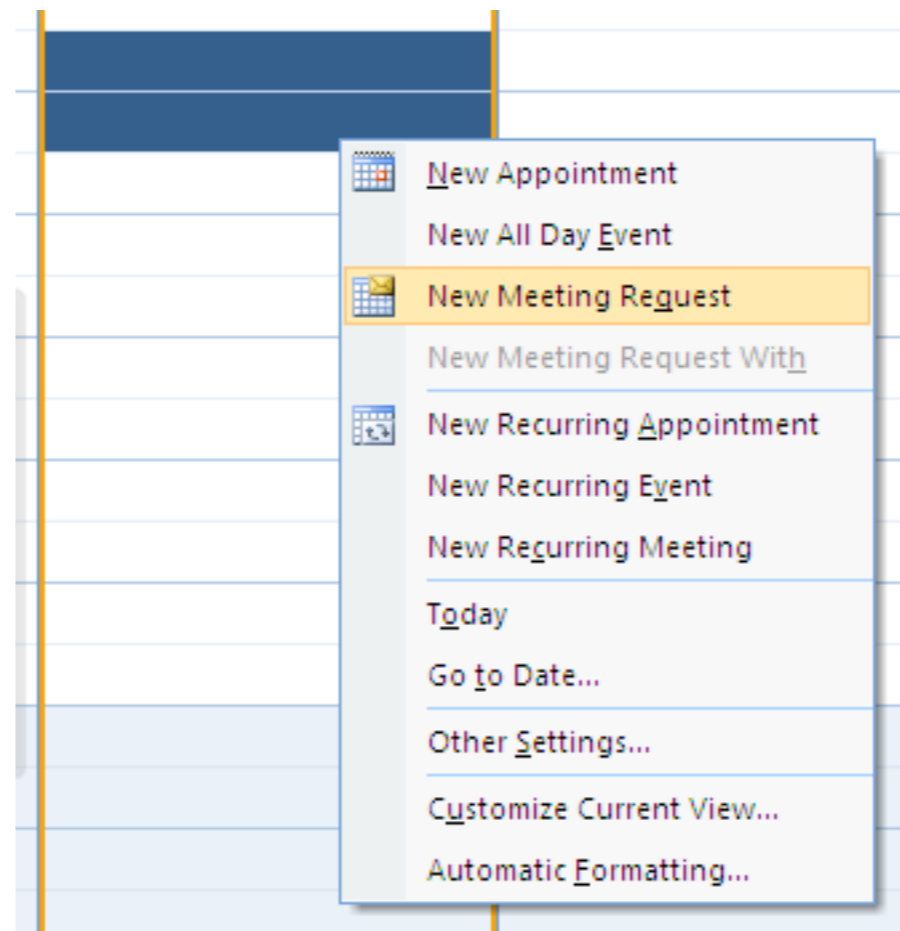
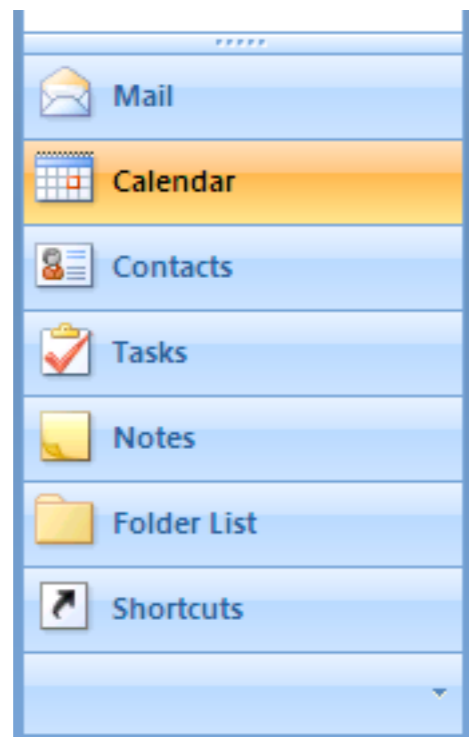
- You now know all the major tricks and operations that you can do.
- Don't be afraid to explore and assign a few tasks to your coworkers. You'll appreciate it in not time.

# Meetings module

- Conducting a good meeting requires preparation
- Mg makes it easy to create good agendas, write meeting minutes and distribute agreed tasks.

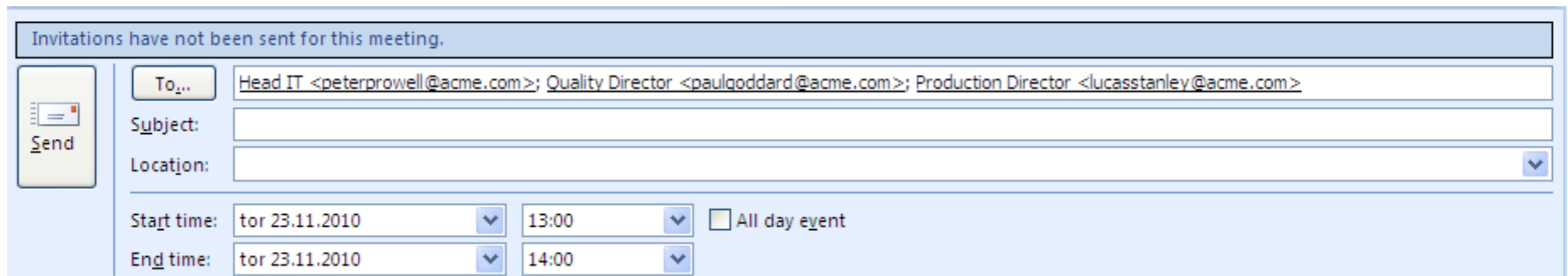
# Creating new meeting

- Create meeting using Calendar in Outlook



# Inviting attendees

- You select attendees by entering their e-mail addresses into meeting invitation



Invitations have not been sent for this meeting.

**To...** Head IT <peterprowell@acme.com>; Quality Director <paulgoddard@acme.com>; Production Director <lucasstanley@acme.com>

**Subject:**

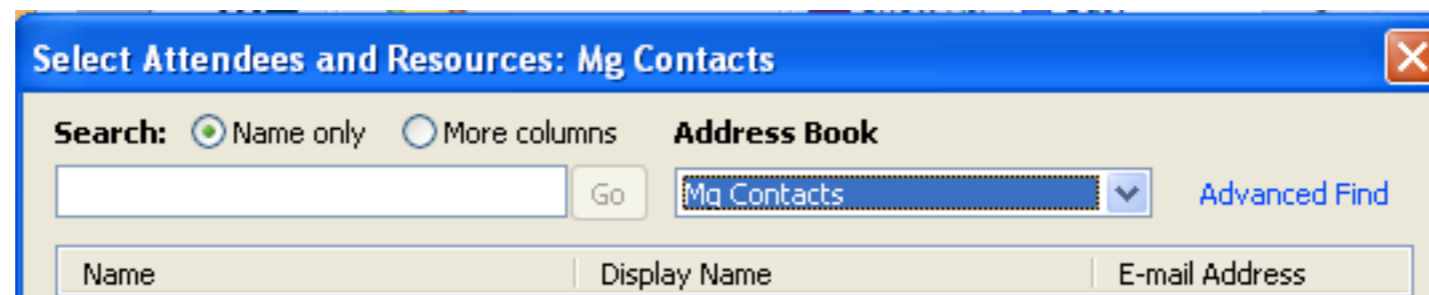
**Location:**

**Start time:** tor 23.11.2010 13:00  All day event

**End time:** tor 23.11.2010 14:00

**Send**

- If you click 'To..' you can also select attendees from Mg contacts



**Select Attendees and Resources: Mg Contacts**

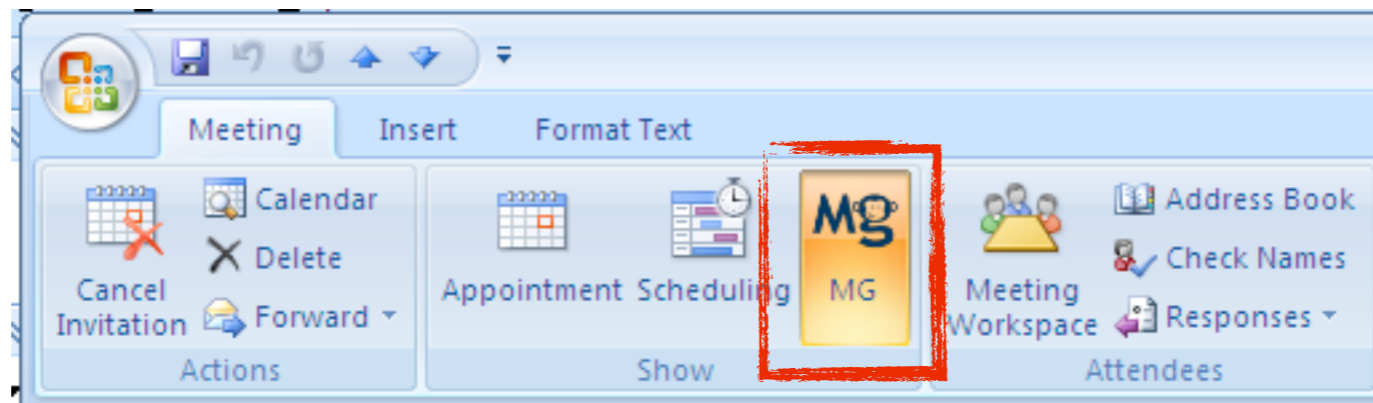
**Search:**  Name only  More columns **Address Book**

**Go** **Mg Contacts** **Advanced Find**

Name	Display Name	E-mail Address
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# Meeting module

- Select Mg from toolbar



# Agenda

The screenshot displays the Outlook Meeting workspace for an "Untitled - Meeting". The interface includes a ribbon with tabs for Meeting, Insert, and Format Text. The Meeting tab is active, showing various options like Calendar, Appointment Scheduling, Meeting Workspace, and Attendees. The Meeting Workspace section is highlighted with a red box and contains the following data:

Title	Due Date	Status	Responsible
*Prepare a HR fluctiation report	20.9.11	Assigned	Director Production
QA estimates	13.1.11	Assigned	Director Quality
Naloga	17.11.10	Assigned	IT Head
Review fall roadmap	25.11.10	Assigned	IT Head

Below the Meeting Workspace is the Agenda section, which contains a table of agenda items:

#	Topic	Responsible	Duration	Source
1	Prepare list of current problems	Quality Director	15	Action
2	*Prepare a HR fluctiation report	Quality Director	15	Action
3	Company picnic	Managing Director	15	Custom

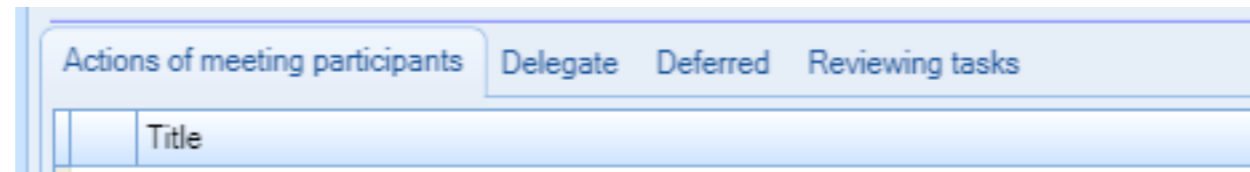
At the bottom of the Agenda section, there is a field to "Add new agenda item:" with a dropdown menu set to "Managing Director" and an "Add" button.

Task groups

Drag and drop tasks

New agenda item

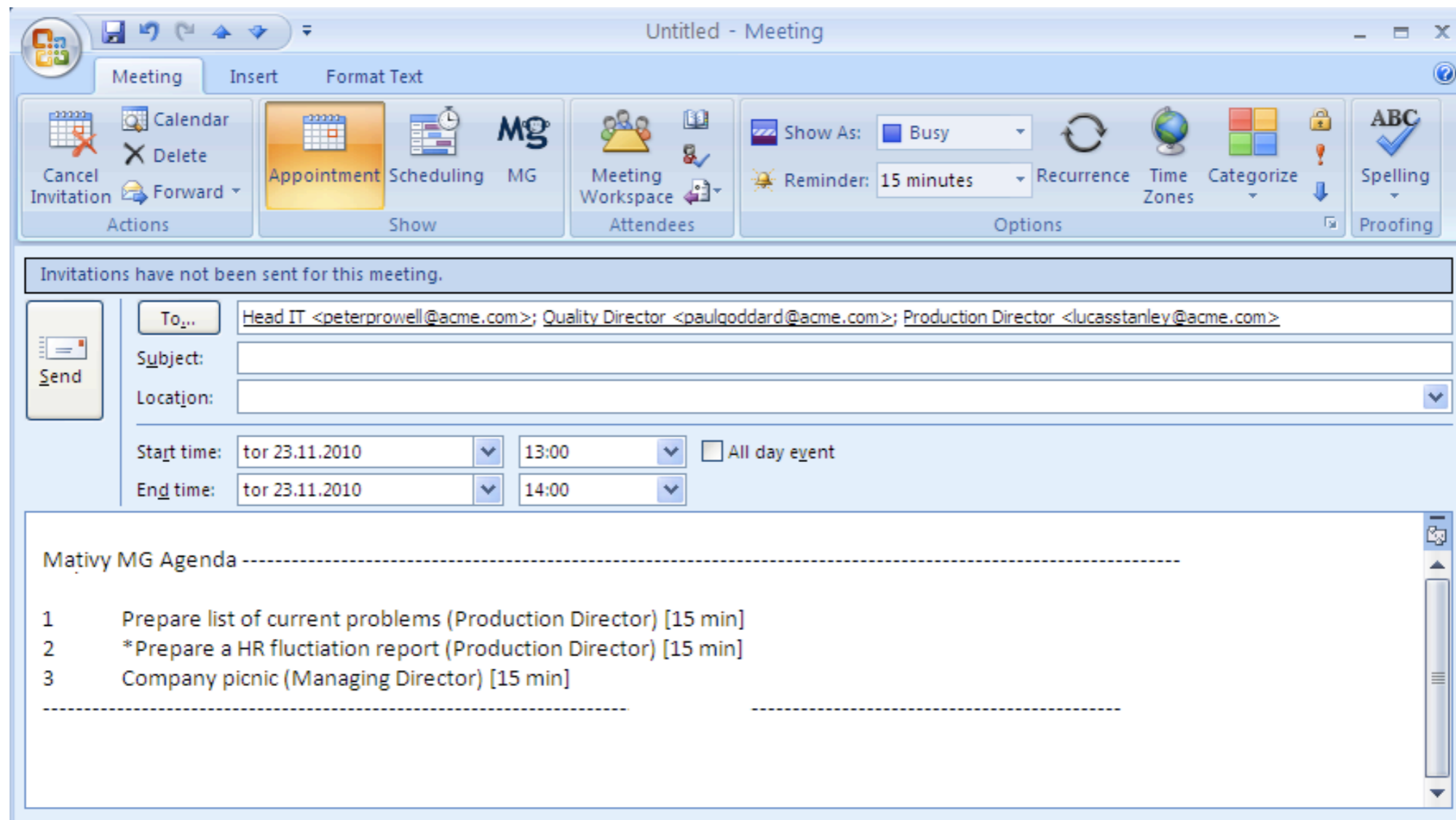
# Task groups



- Actions of meeting participants - tasks that you delegated to meeting participants.
- Delegate - your Delegate
- Deferred - any tasks that are part of defer cycle
- Reviewing tasks - Complete and Cancel tasks waiting for your review

# Meeting agenda (2)

- Agenda is automatically added to your invitation e-mail.



# Conduct meeting

The screenshot shows the Microsoft Meeting application window titled 'Untitled - Meeting'. The interface includes a ribbon with 'Meeting', 'Insert', and 'Format Text' tabs. The 'Meeting' tab is active, showing various options like 'Show As: Busy', 'Reminder: 15 minutes', and 'High Importance'. The 'Conduct' tab is selected in the agenda bar, and a red box highlights the 'Conduct' button. A large white box with the text 'Conduct' is overlaid on the agenda bar. Below the agenda bar is a table with the following data:

#	Topic	Due date	Responsible	Duration	Source
1	Prepare list of current problems	19.10.10	Production Director	15	Action
2	*Prepare a HR fluctuation report	20.9.11	Production Director	15	Action
3	Company picnic	—	Managing Director	15	Custom

At the bottom of the window, the 'Minutes' tab is selected, and a large white box with the text 'Enter meeting minutes for selected task' is overlaid on the minutes input area. On the right side, there are 'Meeting Controls' (Pause, Finish), 'Current Item' (Prepare list of current problems), 'Topic done', 'Previous', 'Next', 'Next Meeting' (00:00), and 'Present' (Production Director, Managing Director, Quality Director, Head IT) sections.

# Conduct: tasks

The screenshot displays the Microsoft Meeting application window titled "Untitled - Meeting". The interface includes a ribbon with "Meeting", "Insert", and "Format Text" tabs. The "Meeting" tab is active, showing various options like "Cancel Invitation", "Appointment Scheduling", "Meeting Workspace", "Show As: Busy", "Reminder: 15 minutes", "Recurrence", "Time Zones", "Categorize", "Private", "High Importance", "Low Importance", "Spelling", and "Proofing".

The main area is divided into three sections: "Agenda", "Conduct", and "Summary". The "Agenda" section is currently selected and displays a table of tasks:

#	Topic	Due date	Responsible	Duration	Source	✓
1	Prepare list of current problems	19.10.10	Production Director	+ 15	Action	✓
Output tasks:						
#	Task name		Responsible		Due date	
1	Prepare list of current problems		Production Director		25.11.10	
2	*Prepare list of current problems		Quality Director		23.11.10	
3	Independant task		Quality Director		22.11.10	
2	*Prepare a HR fluctiation report	20.9.11	Production Director	+ 15	Action	
3	Company picnic	—	Managing Director	15	Custom	

Below the agenda, there are tabs for "Minutes" and "Output tasks". The "Output tasks" tab is selected and shows a detailed view of the tasks with a context menu open over it. The context menu includes the following options:

- Cancel task
- Complete task
- Modify current task
- Add new task
- Split current task

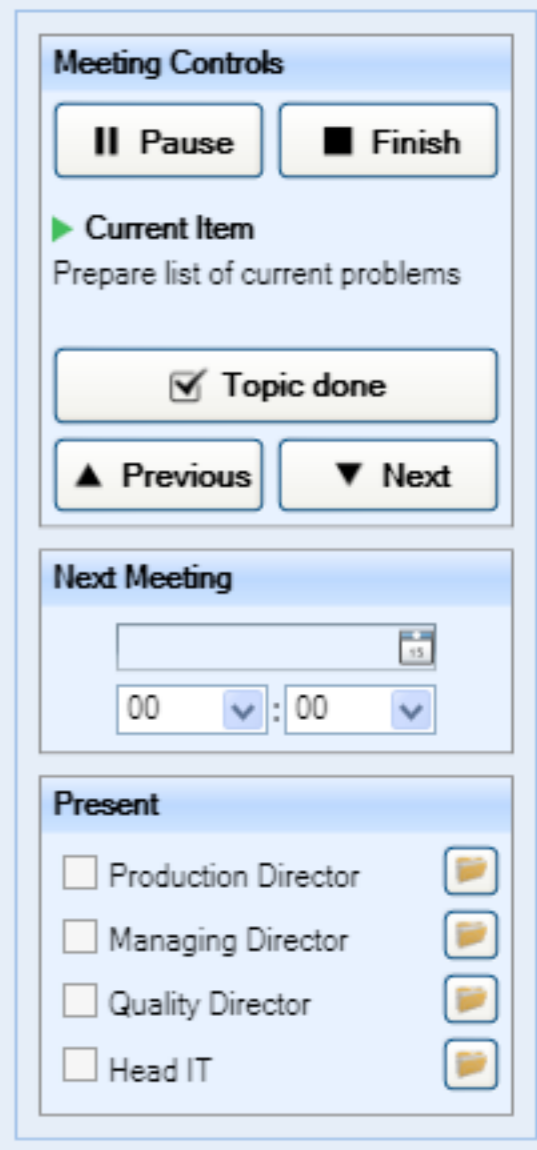
A large text box with the text "Manipulate tasks" is overlaid on the "Output tasks" tab and the context menu. The "Output tasks" tab and the context menu are highlighted with red boxes.

On the right side of the interface, there are several control panels:

- Meeting Controls:** Includes "Pause" and "Finish" buttons.
- Current Item:** Shows "Prepare list of current problems" and a "Topic done" button.
- Next Meeting:** Includes a time selection field.
- Present:** Includes a list of participants: Production Director, Managing Director, Quality Director, and Head IT, each with a "Present" button.

# Finishing meeting

- Mark present participants and finish the meeting
- Schedule time for next meeting.



The screenshot shows a 'Meeting Controls' window with the following sections:

- Meeting Controls:**
  - Buttons: **Pause** (with a double vertical bar icon) and **Finish** (with a square icon).
  - Current Item:** A green triangle icon followed by the text 'Current Item' and 'Prepare list of current problems'.
  - Button: **Topic done** (with a checkmark icon).
  - Buttons: **Previous** (with an upward-pointing triangle icon) and **Next** (with a downward-pointing triangle icon).
- Next Meeting:**
  - A date picker showing the 15th of a month.
  - Time selection: '00' and ':00' with dropdown arrows.
- Present:**
  - Four rows, each with a checkbox and a folder icon:
    - Production Director
    - Managing Director
    - Quality Director
    - Head IT

# Summary

Meeting | Insert | Format Text

Calendar | Appointment Scheduling | Meeting Workspace | Show As: Busy | Reminder: 15 minutes | Recurrence | Time Zones | Categorize | Spelling | Proofing

1 Agenda | 2 Conduct | 3 Summary

**Export minutes**

SUMMARY VIEW

#	Topic	Responsible	Duration	Done
1	Prepare list of current problems	Production Director	15 min	✓
<u>Output tasks:</u>				
#	Name	Responsible	Due date	
1	Prepare list of current problems	Production Director	25.11.10	M
2	*Prepare list of current problems	Quality Director	23.11.10	
3	Independant task	Quality Director	22.11.10	N
2	*Prepare a HR fluctiation report	Production Director	15 min	
3	Company picnic	Managing Director	15 min	

Meeting Start Time: 22.11.10 15:30

Meeting End Time:

Planned Duration: 60 min

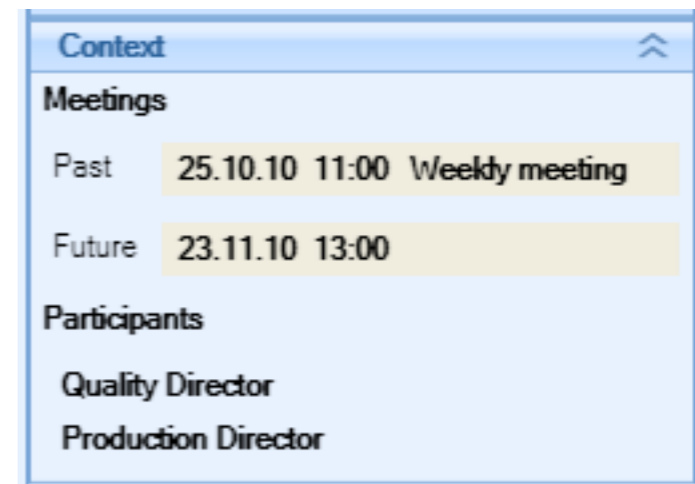
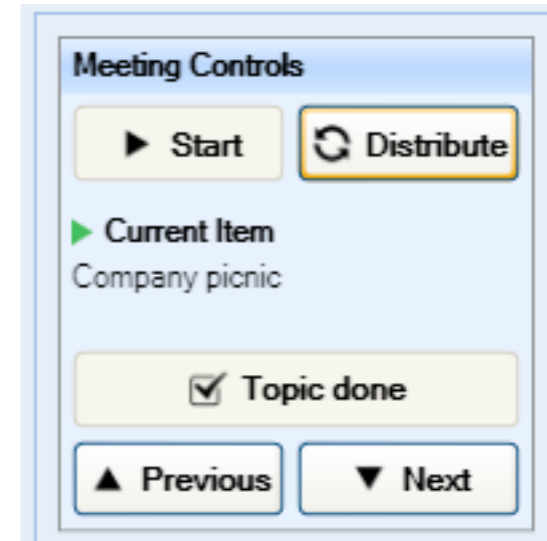
Actual Duration:

Present: Managing Director, Quality Director

Absent: Production Director, Head IT

# Distribute

- Distributes changes to tasks that you agreed on in the meeting
- On task board these tasks display meeting context - information about past and future meetings.



# That's it for Meetings

- Well prepared agenda speeds up meeting considerably.
- If possible, write meeting minutes directly during meeting. This ensures that everyone can immediately see what was agreed on.
- Remember to follow up with tasks at next meeting. Recognition and timely review does wonders for team efficiency.

# Mobile Mg (beta)

- Mg for your BlackBerry
- Mg for iPhone and iPod Touch

please contact us - [info@mativy.com](mailto:info@mativy.com) to  
receive a copy

# Questions?

- If you have any questions or if anything was not clear, please let us know [info@mativy.com](mailto:info@mativy.com)