

Creating and Organizing Tasks

Introduction

Just as Microsoft Office Outlook 2003 has streamlined and updated the capability to track messages, contacts, and the calendar, it has also transformed the humble to-do list into a marvel of organization and efficiency. The Outlook Tasks folder allows you to generate digital to-do lists, as well as track the tasks involved in the completion of a project.

In this chapter, you'll enter tasks, add details to them, mark them as complete, and delete them. You can sort and organize tasks through the use of folders and categories, and you can even assign tasks to others.

Outlook's Task feature provides an efficient vehicle for organizing and managing the things you need to do on a daily, weekly, monthly, or yearly basis.

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What You'll Do

View the Tasks Folder

Create and Update Tasks

Change Task Views

Sort Tasks

Organize Tasks

Manage Your Tasks

Prioritize Tasks

Assign Tasks to Others

Monitor Task Progress

Customize Your Tasks Folder

Share Task Information with Others

Viewing the Tasks Folder

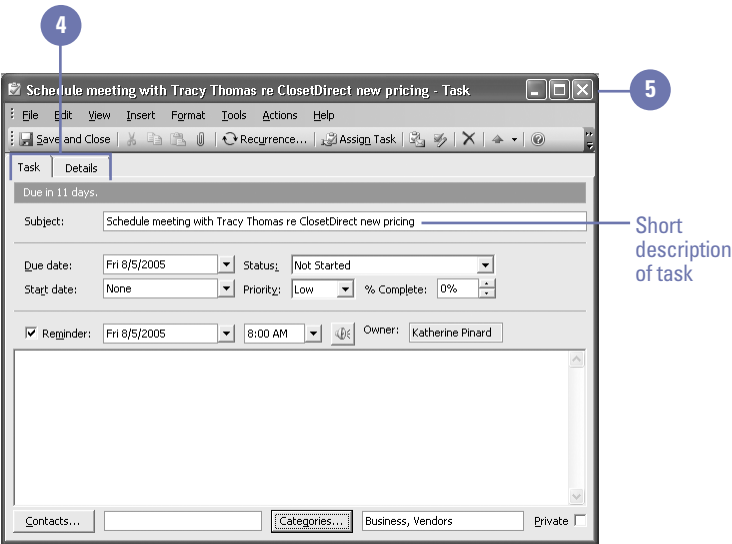
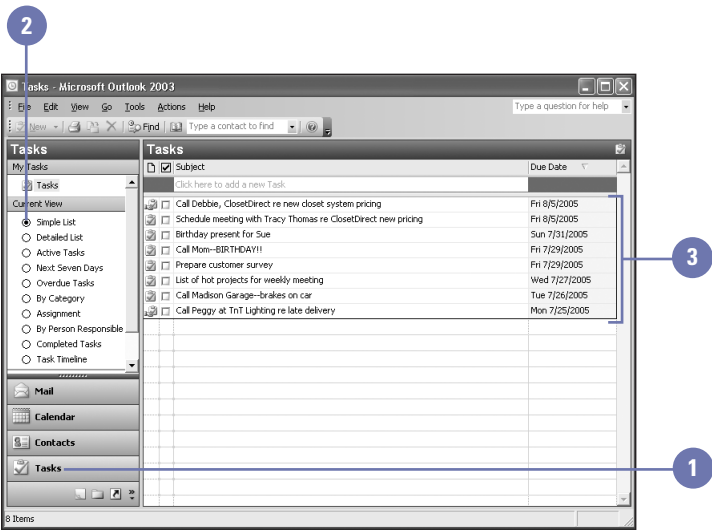
View the Tasks Folder and a Task

- 1 Click the Tasks button on the Navigation pane.
- 2 Click the Simple List option.
- 3 Double-click a task.
- 4 Click the Task or Details tab to view information about the task.
- 5 Click Close.

See Also

See "Changing Tasks Views" on page 174 and "Sorting Tasks" on page 175 for more information on viewing tasks.

Clicking the Tasks button in the Navigation pane displays the contents of the Tasks folder. You can view these contents in several formats, but the default mode is the Simple List view. This view displays the tasks in a list with columns for the item type (a task), a check box to indicate whether the task is done, the task subject (a short description of the task), and the due date. For more information about a task, you can double-click it. The Task dialog box features two tabs, Task and Details. Most of the details from the Tasks folder appear on the Task tab; the Details tab contains boxes for adding information about the details you encounter when performing tasks.



Creating and Updating Tasks

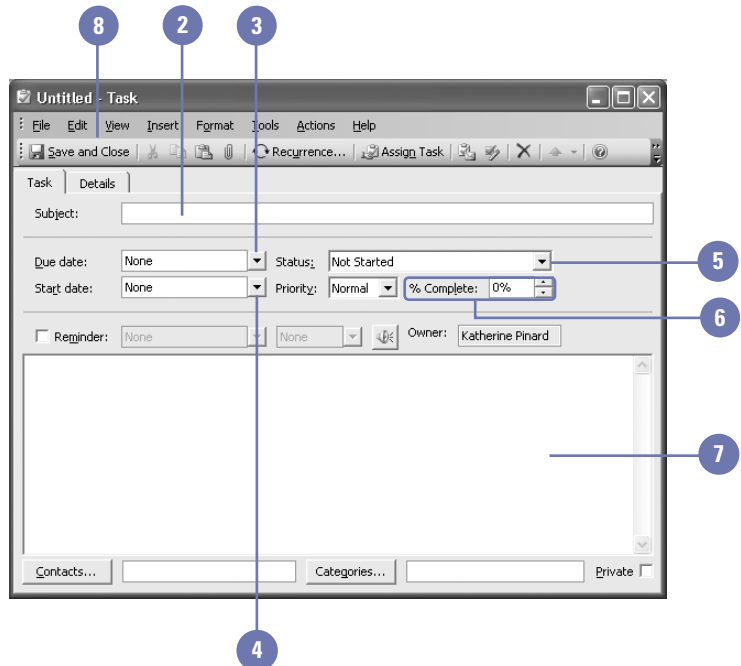


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Create or Update a Task

- 1 In Tasks view, click the New Task button on the Standard toolbar or double-click the task.
- 2 Type a short description of the task in the Subject box.
- 3 Click the Due Date list arrow, and then click the due date.
- 4 Click the Start Date list arrow, and then select the start date.
- 5 Click the Status list arrow, and then click an option.
- 6 Select the percentage in the % Complete box, and then type a new percentage.
- 7 Click in the Notes area, and then type additional information about the task.
- 8 Click the Save And Close button.

To create a task, you click the New Task button on the Standard toolbar. A new Task dialog box opens. Type the Subject, which is the text of the task. This text appears in the Subject column in the Tasks folder. You can also set a Due Date (the date by which the task must be completed), Start Date, the Priority (Low, Normal, or High), and you can check the Reminder check box to have a reminder window open the morning of the due date. To keep track of the task, you can set the Status (Not Started, In Progress, Completed, Waiting On Someone Else, or Deferred) and the Percentage Complete (0 to 100%). You can type additional information about the task in the notes area at the bottom of the window.



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Changing Tasks Views

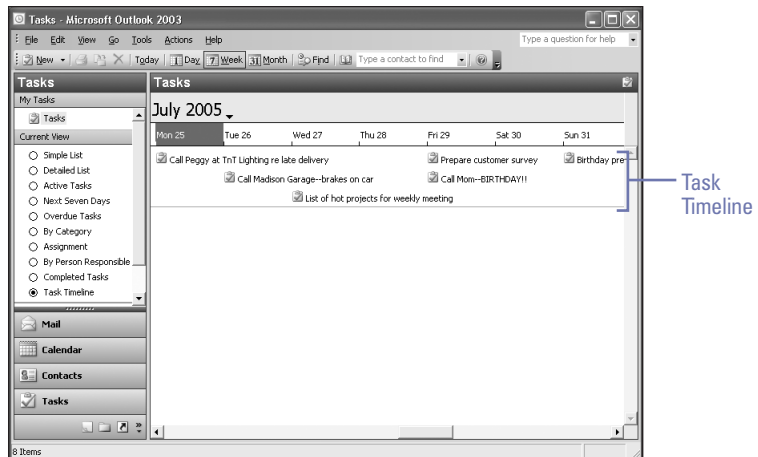
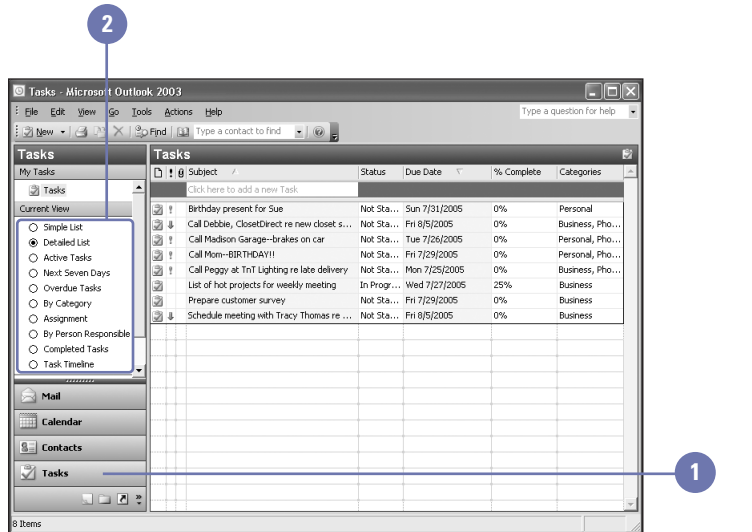
Change Tasks Views

- 1 Click the Tasks button on the Navigation pane.
- 2 You can change the Tasks view in several ways.
 - ◆ Click the View menu, point to Arrange By, point to Current View, and then click By Category.
 - ◆ Click the Detailed List option in the Navigation pane.
 - ◆ Click the Next Seven Days option in the Navigation pane.
 - ◆ Click the Task Timeline option in the Navigation pane.
 - ◆ Click the Simple List option in the Navigation pane.

Did You Know?

You can hide tasks in a grouped view. Hide tasks in grouped views (By Category and By Person Responsible) by clicking the minus sign to the left of the group name. When you do this, the tasks collapse under the group header and the minus sign changes to a plus sign. To display the tasks in that group again, click the plus sign to the left of the group name.

You can display tasks in a variety of views. The default Simple List view displays the task's description, the due date, and a check box to indicate that the task is completed. To see more information about each task, you can switch to Detailed List view, which includes columns for the task's priority, whether a file is attached, the status of the task, the percentage complete, and the category of each task. Detailed List view does not include the column with the check box to indicate that a task is completed (although in both views, completed tasks are indicated with strikethrough text). To show all your tasks in order by due date, you can switch to Task Timeline view to see a horizontal timeline with tasks noted on their due dates.



Sorting Tasks



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Sort Tasks by Field

- 1 Click the Customize Current View link in the Navigation pane (scroll down if necessary), and then click the Sort button.

TIMESAVER Right-click a blank area of the Tasks folder window, and then click Sort on the shortcut menu.

- 2 Click the Sort Items By list arrow, and then click the desired sort field.
- 3 Click the Ascending or Descending option in the Sort Items By area.

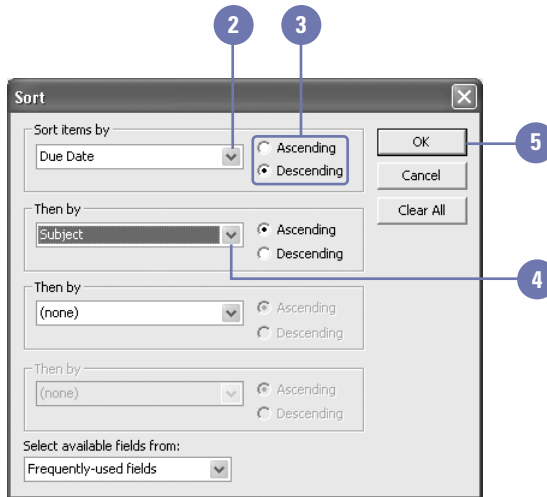
TIMESAVER Click a column head in any view except Task Timeline to sort in ascending order by that column; click the column head again to resort in descending order.

- 4 To add a secondary sort field, click the first Then By list arrow, select the desired sort field, and then click the Ascending or Descending option.

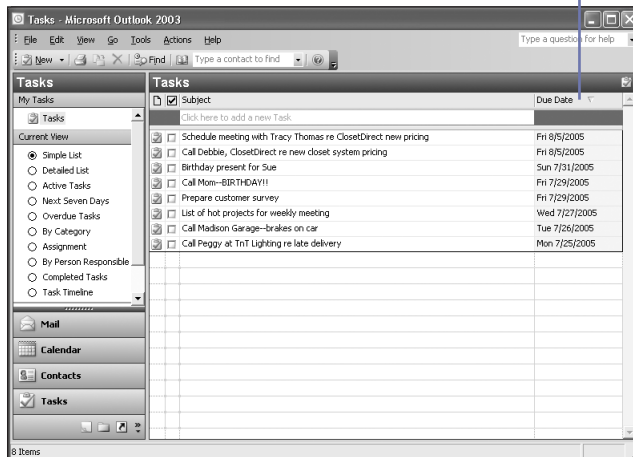
TIMESAVER Press and hold the Shift key, and then click a second column head in any view except Task Timeline.

- 5 Click OK.

Outlook allows you to sort tasks in any view and by any field, either in ascending order (A to Z) or descending order (Z to A). You can sort tasks by a specific field, or by a column header appearing at the top of the view's table (Subject, Due Date, Status, and so on). When sorted in a view, the tasks maintain the same view, but their order has changed. It's also possible to generate multilayered sorts within a sort by adding more fields to the sort. The second field fine-tunes the search by introducing a second criterion. If you sort tasks in a view, the column used for sorting and the sort order are indicated in the view by a small triangle in the column heading.



View sort in this column in ascending order



Organizing Tasks

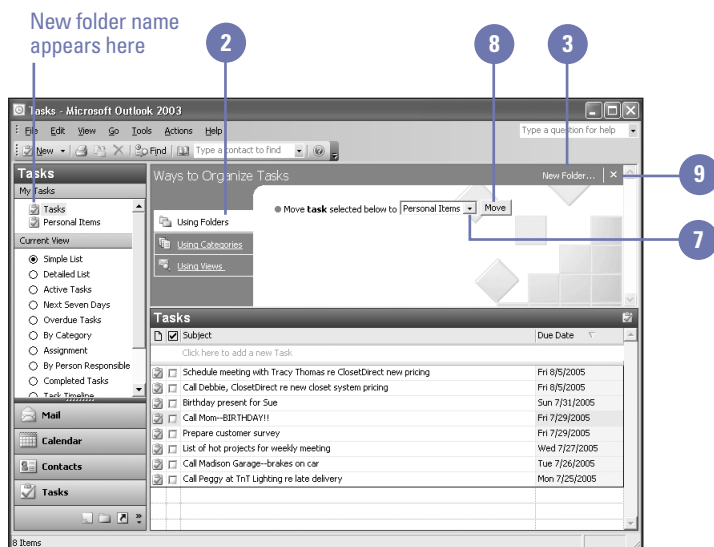
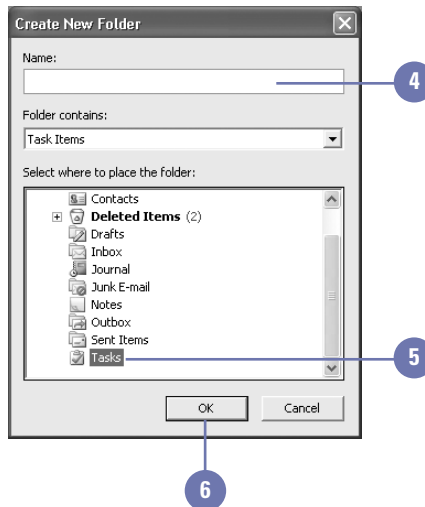
Organize Tasks with Folders

- 1 Click the Tools menu, and then click Organize.
 - 2 Click the Using Folders tab in the Ways To Organize pane.
 - 3 Click the New Folder button.
- TIMESAVER** Click the New button list arrow on the Standard toolbar, and then click Folder.
- 4 Type the new folder name.
 - 5 Click Tasks in the Select Where To Place The Folder list.
 - 6 Click OK.
 - 7 Click the Move Task list arrow, and then click the folder name to which you want to move the task.
 - 8 Click the Move button.

TIMESAVER Drag the task to the folder name in the Navigation pane.

- 9 Click the Close button in the Ways To Organize task pane.

As with other types of items in Outlook, you can use folders and categories—keywords or phrases associated with an Outlook item—to organize tasks. For example, if you are a supervisor, you can keep separate folders for each employee's key tasks or you can categorize tasks according to the projects you are working on. To organize your tasks using folders, you can use the Ways To Organize Tasks pane or you can drag the task to the folder in the Navigation pane. You can assign a category to a task in the Tasks folder or by using the Ways To Organize Tasks pane. You can select from one of the built-in categories, or you can define a new category to suit your needs.



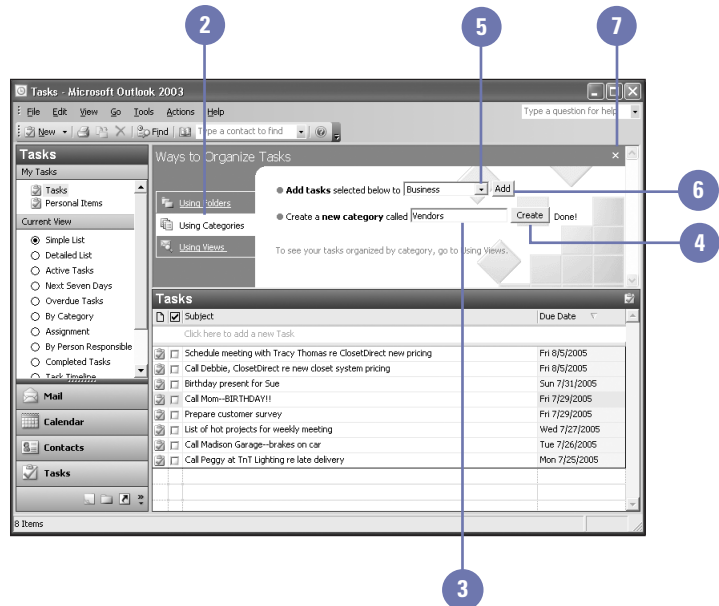
Organize Tasks with Categories

- 1 Click a task in the Tasks folder to select it, click the Tools menu, and then click Organize.
- 2 Click the Using Categories tab in the Ways To Organize pane.
- 3 Type a new category name.
- 4 Click the Create button.
- 5 Click the Add Tasks list arrow, and then click a category name.
- 6 Click the Add button.
- 7 Click the Close button in the Ways To Organize task pane.

TIMESAVER Right-click the task, and then click *Categories* on the shortcut menu.

See Also

See "Customizing Your Tasks Folder" on page 184 for more information about changing the way the Tasks folder looks.



Managing Your Tasks

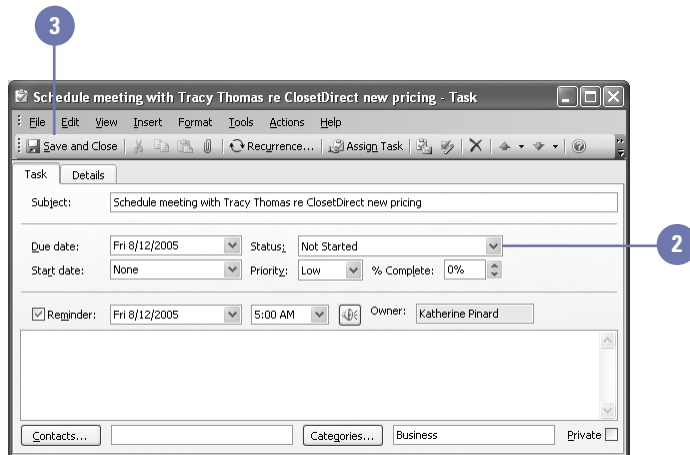
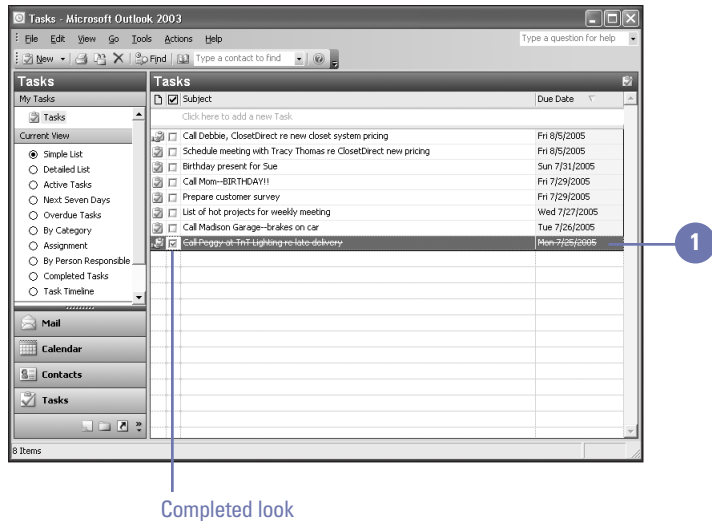
Mark a Task as Completed

- 1 Double-click the task.
- 2 Click the Status list arrow, and then click Completed.
- 3 Click the Save And Close button.

TIMESAVER In views with a Status column, click the Status column for the task, click the list arrow, and then click Completed.

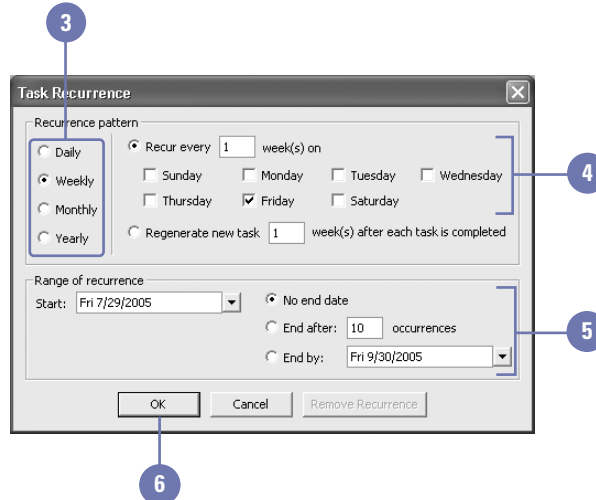
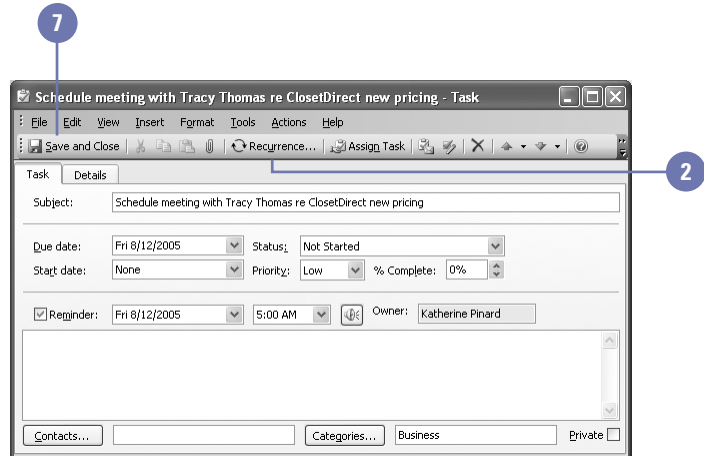
TIMESAVER In Simple List view, click the Complete check box.

As you work with tasks, you'll want to keep your Tasks folder updated to reflect the status of each task. One obvious tactic is to mark each task as completed once you've finished the task. To do this, you open the Task dialog box and then change the Status box to Completed or the % Complete box to 100%. Once you've marked a task as complete, it appears in the Tasks folder with a line through it. Some tasks are jobs that you need to complete on a regular basis. For example, you might need to submit a monthly report to a supervisor. You can make a task a recurring task by clicking the Recurrence button on the Standard toolbar. Recurring tasks have a small icon with two circling arrows in the Tasks folder.



Change a Task to Recurring

- 1 Double-click the task.
- 2 Click the Recurrence button on the Standard toolbar.
- 3 Click to select a Recurrence Pattern: Daily, Weekly, Monthly, or Yearly.
- 4 Click to select other Recurrence options.
- 5 Click the appropriate end date in the Range Of Recurrence area.
- 6 Click OK.
- 7 Click the Save And Close button.



Prioritizing Tasks

Prioritize a Task

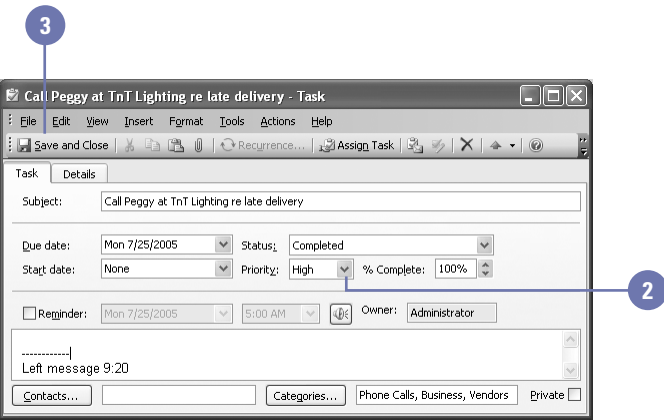
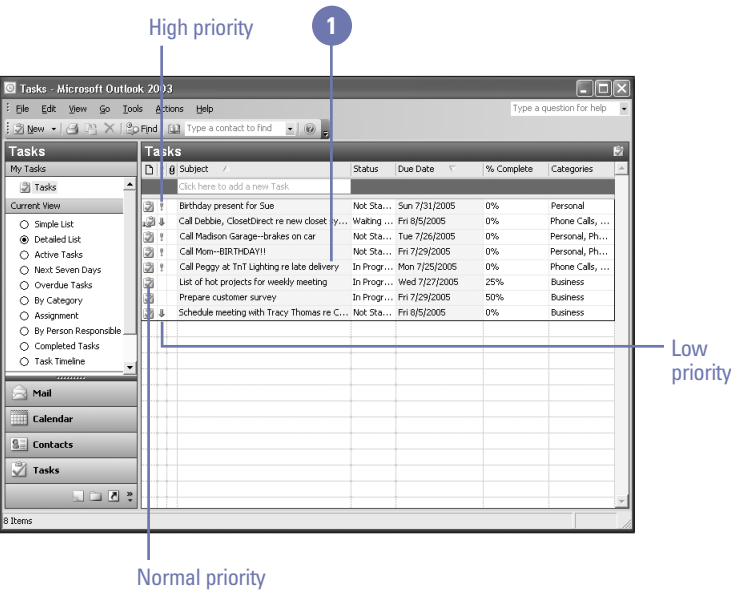
- 1 Double-click a task.
- 2 Click the Priority list arrow, and then select a priority.
- 3 Click the Save And Close button.

Did You Know?

You can record the amount of time you spend working on a task. Click the Tasks button on the Navigation pane, double-click a task, click the Details tab, and then type the number of hours you worked in the Actual Work box.

You can delete a task. Click the task you want to delete, and then click the Delete button on the Standard toolbar.

If you have a long list of tasks, it is important to prioritize them, so that you finish the most important ones first. You can assign a priority of High, Medium, or Low to each task. The priority appears in a column with an exclamation point heading in all views, except for the Simple List view. A High priority task has a red exclamation point as the priority indicator; Normal priority has no indicator; and Low priority has a downward-pointing blue arrow. As you plan your day, it is a good idea to schedule time to complete certain tasks. You can drag a task from the Tasks folder to the Calendar, and then set start and end times for the task. The task appears in your calendar as an appointment. Finally, you might not want to keep a list of every task that you have completed, or you might need to delete an active task.



Schedule Time in Calendar for a Task

- 1 Drag a task from the Tasks folder onto the Calendar button on the Navigation pane.
- 2 Set Start and End days and times in the Appointment dialog box that opens.
- 3 Click the Save And Close button.

3

Task subject

2

Appointment | Scheduling

Subject: Schedule meeting with Tracy Thomas re ClosetDirect new pricing

Location: Label: None

Start time: Mon 7/25/2005 7:30 AM All day event

End time: Mon 7/25/2005 7:30 AM

✓ Reminder: 15 minutes Show time as: Busy

Subject: Schedule meeting with Tracy Thomas re ClosetDirect new pricing
Due Date: Friday, August 05, 2005
Priority: Low
Status: Not Started
Percent Complete: 0%
Total Work: 0 hours
Actual Work: 0 hours

Contacts... Categories... Business Private

Assigning Tasks to Others



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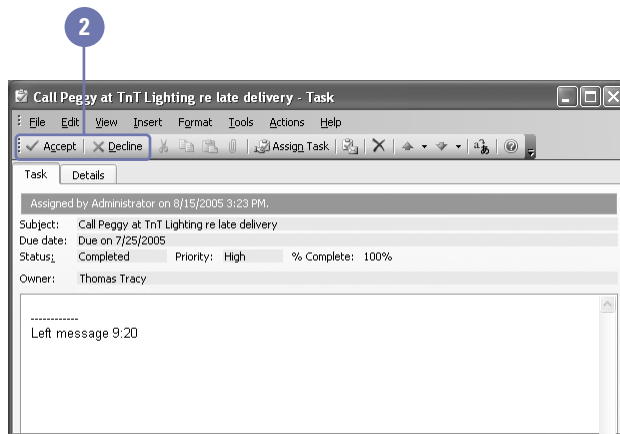
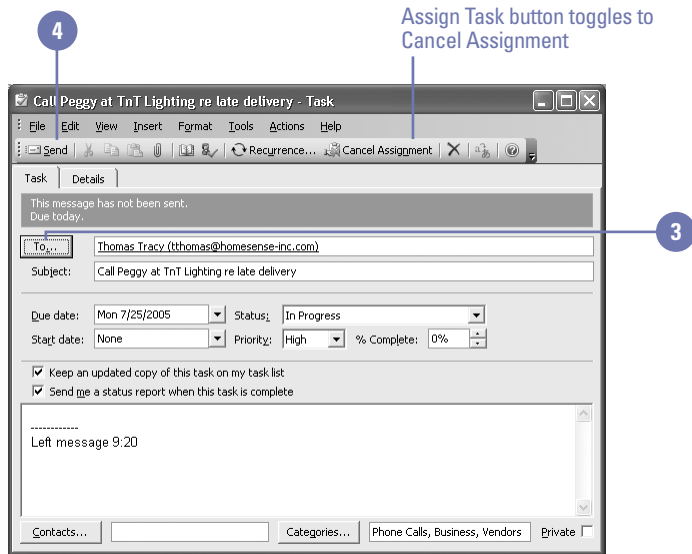
Assign a Task

- 1 Double-click the task or create a task.
- 2 Click the Assign Task button on the Standard toolbar.
- 3 Click the To button, select a recipient, click the To button, and then click OK.
- 4 Click the Send button.

Accept or Decline a Task

- 1 Open the task request.
- 2 Click the Accept button or the Decline button.
- 3 To reply to the sender with a comment, click the Edit The Response Before Sending option, click OK, type a comment, and then click the Send button on the Standard toolbar.
- 4 To send the response without comment, click the Send The Response Now button on the Standard toolbar.

Because most projects involve the efforts and input of several people, it will often be necessary to delegate responsibilities for a task to other members on your team of contacts. In Outlook, you can assign and send a task assignment to a co-worker. To assign a task, you open the Task dialog box, click the Assign Task button, and then assign the task to someone in your Contacts list. If a task is assigned to you, you will receive an e-mail that contains the task request. You can accept or decline the task, and send your reply back to the sender.



Monitoring Task Progress



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Receive Updates for an Assigned Task

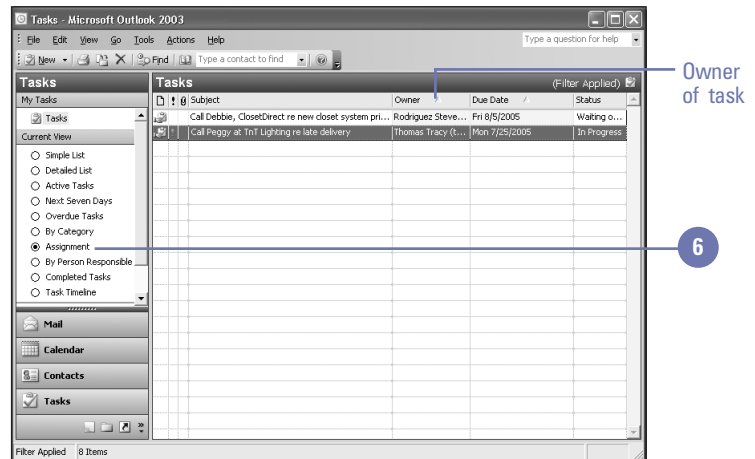
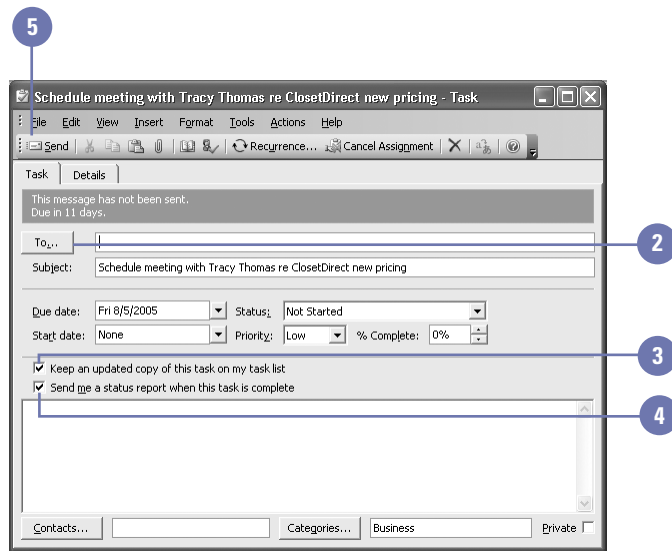
- 1 Double-click the task.
- 2 Click the To button, select a recipient, click To, and then click OK.
- 3 If it is not already selected, select the Keep An Updated Copy Of This Task On My Task List check box.
- 4 If it is not already selected, select the Send Me A Status Report When This Task Is Complete check box.
- 5 Click the Send button.
- 6 Click the Assignment option on the Navigation pane.

Did You Know?

You can cancel a task assignment. In Tasks view, double-click the task, and then click the Cancel Assignment button on the Standard toolbar.

You can arrange the tasks to view all the tasks you have assigned. In Tasks view, click the View menu, point to Arrange By, point to Current View, and then click Assignment.

After you've passed along ownership of a task, you will want to keep track of it. Whenever it's edited, you'll want to check the changes, just as you will need to know any supplemental information about the task and stay up to date on its status. Outlook enables you to automatically keep track of assigned tasks and receive regular updates on their progress. When you create a task, you are designated as the owner of that task. As its owner, you are the only person who can edit the task, unless you assign it to someone else and they accept the assignment. In that case, however, you can still opt to maintain an updated copy in your Tasks folder and obtain status updates whenever the task is edited or completed.



Customizing Your Tasks Folder

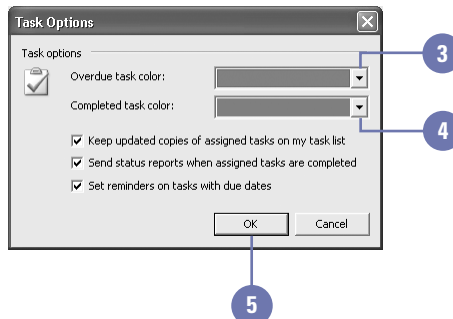
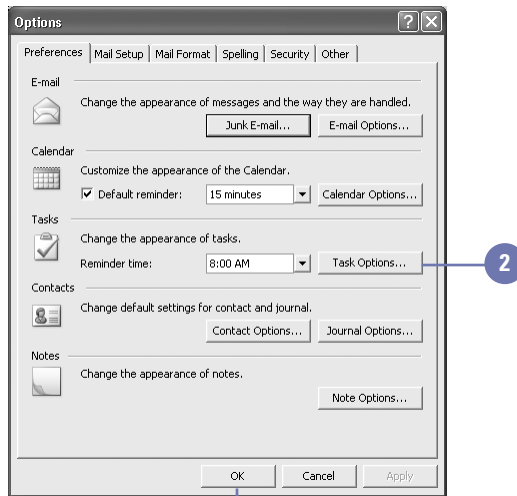
Customize the Default Colors in the Tasks Folder

- 1 Click the Tools menu, and then click Options
- 2 Click Task Options.
- 3 Click the Overdue Task Color list arrow, and then select a color.
- 4 Click the Completed Task Color list arrow, and then select a color.
- 5 Click OK.
- 6 Click OK.

See Also

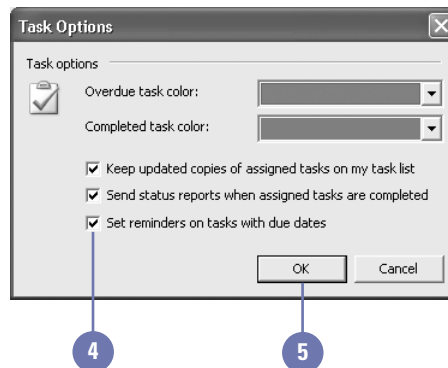
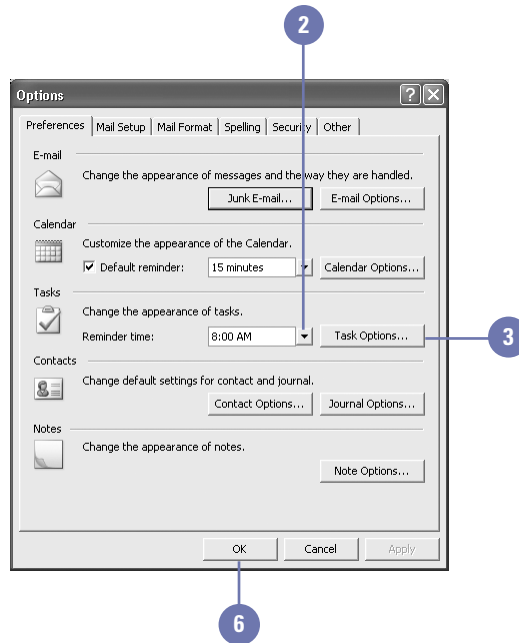
See "Organizing Tasks" on page 176 for more information about changing the way you view the Tasks folder.

You can customize the Tasks folder to suit your working style. For example, you can change the default colors of overdue and completed tasks from red and gray to any other available color. To do this, click the Tools menu, click Options, and then click the Task Options button. You can also customize task reminders. In the Options dialog box, you can change the time that a reminder window opens for a task. The default time is 8:00, the start of the default work day in Calendar. You can also modify the task options so that reminders do not appear for tasks with due dates. You do this in the Task Options dialog box.



Customize Task Reminders

- 1 Click the Tools menu, and then click Options.
- 2 Click the Reminder Time list arrow, and then click the time that you want a reminder window to open.
- 3 Click Task Options.
- 4 Select or clear the Set Reminders On Tasks With Due Dates check box to use or not use reminders.
- 5 Click OK.
- 6 Click OK.



Sharing Task Information with Others

Share Task Information with Others

- 1 Double-click a task.
- 2 Click the Actions menu, and then click Forward.

TIMESAVER Right-click a task in the Tasks folder, and then click Forward on the shortcut menu.

- 3 Click the To button, select a recipient, click To, and then click OK.
- 4 Click the Send button.

Did You Know?

You can attach more than one task to an e-mail message. You can attach more than one task to an e-mail message by dragging a new task from the Tasks folder onto the Message window. The task will appear as a second attachment in the Attach box.

You can make a task private. To make a task private, click the Tasks button on the Navigation pane, double-click a task, and then click the Private check box.

See Also

See "Assigning Tasks to Others" on page 182 for more information about assigning tasks to someone else.

If you are working on a project with a group, you might need to share information about tasks with other members of the group. You can send a task to someone else without actually assigning it to that person. To do this, open the Task dialog box, click the Actions menu, and then click Forward. A new e-mail message window opens with the task as an attachment.

