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Microsoft Outlook 2010: Tasks

Using Tasks for Greater Effectiveness



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Introduction

There is more to Outlook than e-mail (although that is its main function), and its Tasks features can be used to enhance your effectiveness and productivity.

You can create Task items in Outlook, and view them in different ways, mark a task as being completed, and assign and forward tasks to others. You can also create recurring tasks that appear at specified times, such as a reminder to submit a project's status report every week to your supervisor or to assign a task to an Associate with a specific deadline for completion.

Objectives

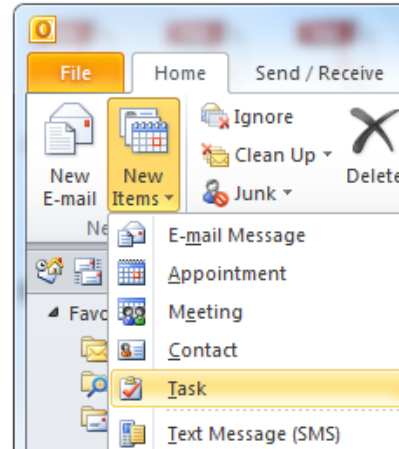
With this guide you will learn how to do the following with Outlook's Task tools:

- ▶ Create a Task for Yourself
- ▶ Assign a Task to an Associate
- ▶ Respond to an Assigned Task
- ▶ Reclaiming a Rejected Task
- ▶ Tracking Tasks
- ▶ Send a Status Report or Update
- ▶ Create a Task from an E-Mail
- ▶ Create a Task in the To-Do Bar
- ▶ Create a Task in Calendar
- ▶ Update a Task
- ▶ Mark as Complete
- ▶ Delete a Task

Create a Task for Yourself

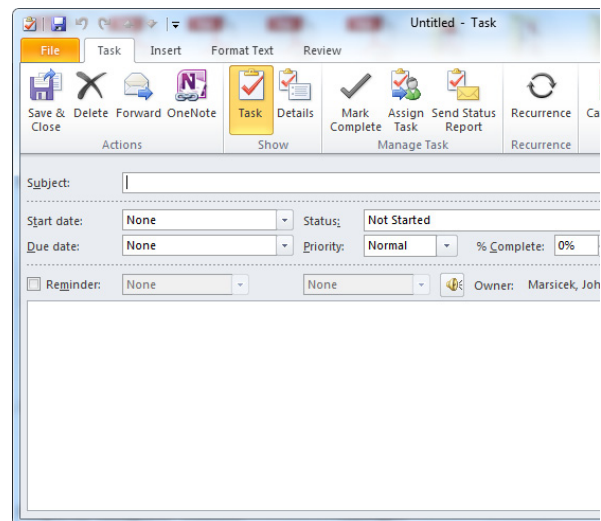
Follow the steps below to create a task for yourself with reminders.

1. From Outlook's Home tab, click **New Item** and select **Task** from the dropdown list.

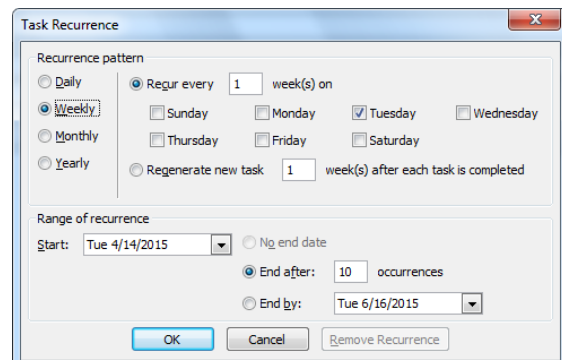


Result: The Task screen appears.

2. In the **Subject** field, type the name of the task.

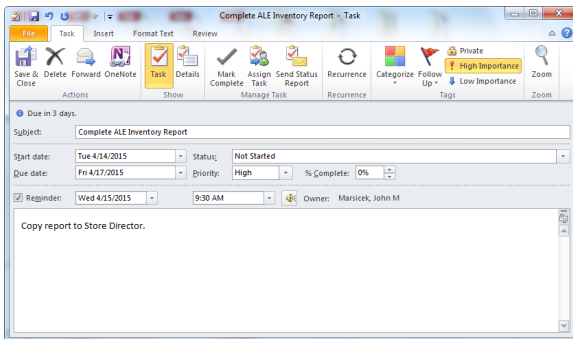


3. Set the task's start and end date.
4. (optional) If the task is recurring, then click the **Recurrence** icon at the top of the screen.



Result: The Recurrence dialog box appears.

- a. In the Task Recurrence dialog box, set the recurrence pattern (Daily, Weekly, Monthly, Yearly) of the task. Do not select *Regenerate new task* or the task will not recur at regular intervals.
 - b. Set the range of recurrence.
 - c. Click **OK** to set your recurrence rules and return to the Task screen.
5. If you want reminders, then click the **Reminders** checkbox and set the date, time, and (optional) sound for the reminder.
 6. Enter any additional information about the task in the text field.



7. When finished, click the **Save & Close** icon at the upper-left corner of the Task screen.



Result: The task is saved, and will follow any reminder and/or recurrence rules that were defined for the task.

Assign a Task to an Associate

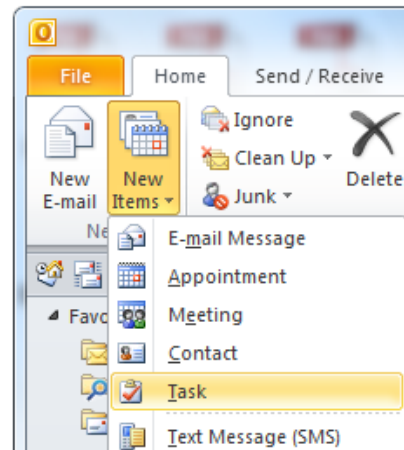
While creating tasks for yourself is useful for your own productivity, you can also assign tasks to others.

After creating a task and assigning it, you may want status reports and updates on the progress of the task. Also, if the task is not accepted, then you may want to reassign it to somebody else.

Note: *If a task is assigned to more than one person, you cannot keep an updated copy of that task in your task list. Split the project into separate tasks and assign each task individually.*

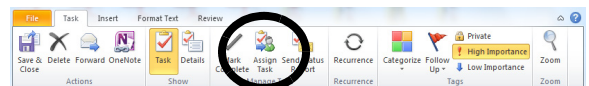
Follow the steps below for assigning a task to an Associate.

1. From Outlook's Home tab, click **New Item** and select **Task** from the dropdown list.



Result: The Task screen appears.

2. Click the **Assign Task** icon at the top of the Task screen.



Result: The To field appears above the Subject field.

3. Click the **To** button.

Result: The Select Task Recipient screen appears.

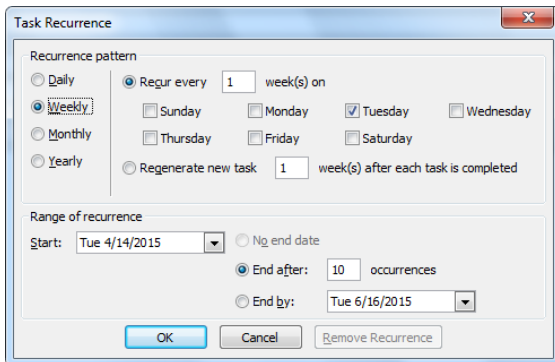
4. Select the name(s) of the person(s) to receive the assigned task, click the **To** button, and click **OK** to return to the Tasks screen.

Result: The recipient's name or e-mail address appears in the To field.

5. In the *Subject* field, type the name of the task.
6. Set the task's *Due date* and *Status* options.

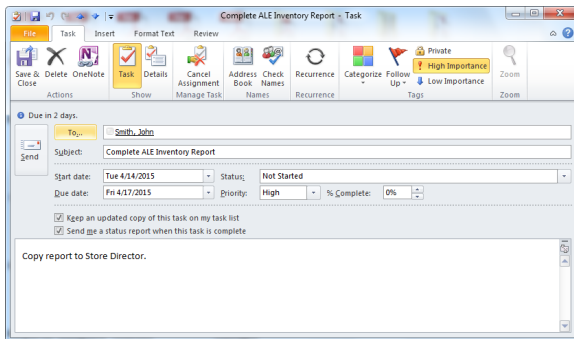
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7. Select or clear the **Keep an updated copy of this task on my task list** check box and the **Send me a status report when this task is complete** check box.
8. (optional) If you want the task to repeat, click the **Recurrence** icon at the top of the screen.



Result: The Recurrence screen appears.

- a. In the Task Recurrence dialog box, set the recurrence pattern (Daily, Weekly, Monthly, Yearly) of the task. Do not select *Regenerate new task* or the task will not recur at regular intervals.
 - b. Set the range of recurrence.
 - c. Click **OK** to set your recurrence rules and return to the Task screen.
9. Enter any additional text such as instructions or needed information for the recipient in the text field.



10. When finished, click the **Send** button at the upper-left corner of the Task screen.

Result: The task is saved, and the recipient receives an e-mail to accept the task.

Note: After accepting the task, the recipient has ownership of it and can modify it.

Respond to an Assigned Task

When a task is assigned to an Associate, the task can be accepted or declined.

1. Open the task or task request e-mail.
2. Click **Accept** or **Decline** at the top of the screen.
3. Do one of the following:
 - Click **Edit the response before sending**, type your comment in the message, and then click **Send**.
 - Click **Send the response now**.

Reclaiming a Rejected Task

If the task is not accepted by the recipient, then an e-mail is sent to notify the originator that it was declined. The task's originator can do the following:

1. Open the e-mail message that contains the task request. This message is usually in your **Sent Items** folder.

Result: The task window for the rejected task appears.
2. Click the **Return to Task List** icon at the top of the screen.

Result: The basic task screen appears.
3. You can ...
 - Modify the task.
 - Click **Delete** to remove the task.
 - Click the **Assign Task** icon to assign the task to another Associate.
 - Click **Save & Close** to take on the task.

Tracking Tasks

There are three ways to track the tasks that you have assigned to others.

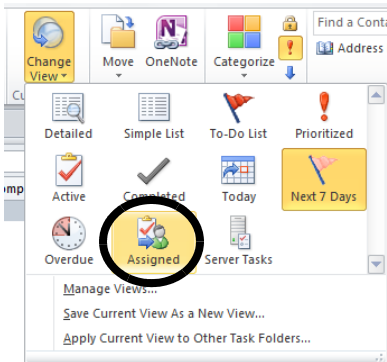
Method 1. Automatically keep copies of tasks that you have assigned to other people:

1. Click the **File** tab at the top of Outlook and select **Options**.

Result: The Outlook Options screen appears.
2. Click the **Tasks** option.
3. Select the **Keep my task list updated with copies of tasks I assign to other people** check box.
4. Select the **Send status report when I complete an assigned task** check box.
5. Click **OK** to exit Outlook Options.

Method 2. View the tasks you assigned to others.

1. Click **Tasks** in the lower-left corner of the Outlook screen.
2. Click the **View** tab at the top.
3. Click the **Change View** icon at the top, and select **Assigned**.



Result: Only the tasks you assigned to others appear in the Tasks section.

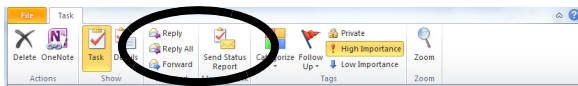
Method 3. View the list of people who receive updated copies of an assigned task.

1. Open the assigned task for which you want to view the list.
2. Click the **Details** button and view the names in the *Update list* box.

Send a Status Report or Update

To request a status report or update about an assigned task's progress, follow the steps below:

1. Click **Tasks** in the lower-left corner of the Outlook screen.
2. Click the **View** tab at the top.
3. Click the **Change View** icon at the top, and select **Assigned** or **Active**.
4. Open (double-click) the task for which you want to send a status report or comment.
5. Click either **Reply**, **Reply All**, or **Send Status Report**.



Result: An e-mail message screen appears, with the recipient's e-mail address in the To field (if Reply or Reply All was selected)..

Note: *If you assigned the task and you selected Send Status Report, then enter the recipient's name or e-mail address in the To and Cc fields.*

If the task is assigned to you, then the To field is completed automatically.

6. In the body of the message, type your query or update to the recipient about the task's status and progress.
7. Click **Send**.

Create a Task from an E-Mail

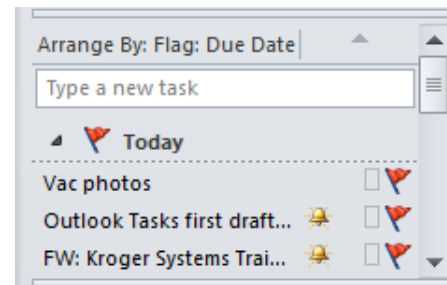
1. Click the e-mail to highlight it.
2. Drag it to the **Tasks** button at the bottom left of the Outlook screen (Tasks in the Navigation pane).

Result: A new Task window appears, with the text of the e-mail copied into task's text field. The e-mail's subject line becomes the task's subject.

Note: *To add the e-mail text as an attachment instead of being copied into the task, right-click the e-mail and drag it to the Tasks button. A pop-up menu appears. Click **Copy Here as Task with Attachment**.*

Create a Task in the To-Do Bar

1. In the To-Do bar located on the right side of Outlook, click in the *Type a new task* field.



2. Type the task subject and press **<Enter>**.

Result: The new task is added to the To-Do bar.

Note: *By default the task is assigned a due date and a start date of today. The task can be opened and the due/start dates can be changed.*

3. To move a task up or down on the To-Do list, click and drag the task to the desired position. As you drag the task, a red line with arrows indicates where the task will be when releasing the mouse button.
4. If you want to edit the new task, see *Update a Task* on page 6.

Create a Task in Calendar

From the Calendar screen, you can create a task.

1. Enter the Calendar view screen and set the calendar to Day or Week views.
2. In the *Tasks* section at the bottom of the screen, as your pointer hovers over the blank space beneath a day column, **Click to add task** appears.
3. Click any blank space beneath a day column.
4. Type the subject for the task and press **Enter**.
5. Double-click the task to view the task's details screen.

Result: The task's details screen appears for you to edit the task. By default, the task's start and end times are set for that day. Use the task details screen to modify the task's settings.

6. Change the start and due dates, as well as any other settings.
7. When finished, click **Save & Close** to save your settings and close the window.
8. To move a task up or down on the To-Do list, click and drag the task to the desired position. As you drag the task, a red line with arrows indicates where the task will be when releasing the mouse button.

Update a Task

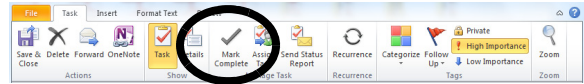
To edit or update a current task, do the following:

1. Click **Tasks** in the lower-left of Outlook.
Result: The To-Do List appears.
2. Double-click the task you want to change.
Result: The select task's Task window appears.
3. From the Task window, you can change the task's...
 - Recurrence
 - Category color
 - Follow up flag
 - Start, Due dates
 - Status
 - Priority
 - % Complete
 - Reminder frequency
 - Additional text/notes
4. When done, click the **Save & Close** icon to save your changes and close the Task window.

Mark as Complete

When the task is done, follow the steps below to mark it as being completed.

1. Click **Tasks** in the lower-right of Outlook.
Result: The To-Do List appears.
2. Click to highlight the task you want to mark as completed.
3. Click the **Mark Complete** icon at the top of the screen.



Result: Depending on your view of the To-Do List, the selected task is either crossed out or removed from the task list.

Delete a Task

1. Click **Tasks** in the lower-right of Outlook.
Result: The To-Do List appears.
2. For the task you want to delete, right-click the subject line of the task.
Result: A pop-up menu of options appears.
3. Click **Delete** on the pop-up menu.
Result: The task is permanently removed from the To-Do List.

