Outlook 2007 Tasks Quick Reference Guide

A. Create a task from the File menu

1. On the **File** menu, point to **New**, and then click **Task**.
2. In the **Subject** box, type a name for the task.
3. On the **Task** tab, in the **Actions** group, click **Save & Close** or continue with the following steps to customize your task.
   a. If you want, set the **Start date** and the **Due date** for the task.
   b. If you want to add a reminder alert, select the **Reminder** check box, and then enter the date and time for the reminder.
   c. If you want to track your progress on this task, in the **Status**, **Priority**, and **% Complete** boxes, enter the values that you want.
   d. If you do not want other people to see a shared task entry, on the **Task** tab, in the **Options** group, click **Private**.
4. On the **Task** tab, in the **Actions** group, click **Save and Close**.

B. Create a task or a to-do item from an e-mail message

There are several ways to turn an e-mail message into a task or a to-do item. Do any of the following:

- **Flag an e-mail message for follow-up**
  Flagging a message is the best option when you need to quickly mark an item for your attention at a later time. When you flag an item, it is displayed in the Mail view with a flag, in Tasks, in the To-Do Bar, and in the Daily Task List in Calendar.

NOTE: Using this method, you do not have the ability to assign it as a task to someone else, or indicate its progress or percentage of completeness.

- **In Mail, right-click the flag column for an e-mail message, then choose the due date**

NOTE: To change the reminder time, reminder sound, Start date, Due date, or the flag text that appears in the InfoBar, or to clear the reminder flag, right-click the flag column next to the e-mail message, and then click **Custom** or **Add Reminder**.

(Create a task from e-mail cont'd)

1. **Drag an e-mail message to the To-Do Bar to create a to-do item - t**he To-Do Bar must be arranged by **Start Date** or **Due date** to use the following steps:
   a. Click an e-mail message to select it, and then drag the message to the task list section of the To-Do Bar.
   b. When you see a red line with arrows at each end positioned where you want to place the task, release the mouse button.
2. **Drag an e-mail message to the Tasks button to create a new task -** When you drag an e-mail message to **Tasks** in the Navigation Pane, you can use all of the features of a task item, and the contents of the e-mail message, except attachments, are copied to the body of the task. Even if the original e-mail message is later deleted, the task, including the copied contents, except attachments, of the e-mail message, is still available.

NOTE: To add the message as an attachment to the task instead of pasting the text into the task body, right-click the message and drag it to the task list. On the shortcut menu, click **Copy Here as Task with Attachment**. A new task item window appears, and a copy of the e-mail contents is pasted into the task body. The subject of the e-mail message becomes the subject of the task. If you want, you can change the subject.

C. Edit a Task

You can change information about the tasks, such as Status, Due Date, and % Complete by double-clicking the task to open it. Edit the information.

D. Create a Recurring Task

1. If you want to make a task recur, on the **Task** tab, in the **Options** group, click **Recurrence**.
2. In the **Task Recurrence** dialog box, click the frequency (**Daily**, **Weekly**, **Monthly** or **Yearly**) with which the task should recur, and then do one of the following:
   a. **Make the task recur based on a regular interval**
      In the **Recurrence pattern** section, select the options for the frequency interval that you want. Do not select **Regenerate new task**, or the task will not recur at regular intervals.
   b. **Make the task recur based on completion date**
      Select **Regenerate new task**, and in the box, type the amount of time after which a new task must be generated.
   c. Each time that you mark the task complete, a new task will be created based on your specifications.
3. Click **OK** to close the **Task Recurrence** dialog box.

NOTE: This is your best choice when you do not want the next reminder for a task to appear until the previous one is marked as complete. If you do not mark the item complete, the next reminder will never appear.

E. Skip an occurrence of a recurring task

1. Open the specific occurrence that you want to skip.
2. On the **Task** tab, in the **Options** group, click **Skip Occurrence**.

NOTE: If you set the recurring task to end after a specified number of occurrences, each occurrence you skip reduces the number of remaining occurrences by one.

F. End recurrence of a task

1. Open the recurring task.
2. On the **Task** tab, in the **Options** group, click **Recurrence**.
3. Click **Remove Recurrence**.

G. Color Categorize Tasks

After you have categorized tasks, you can use the By Category view to show all the tasks in the same category grouped together. You can easily locate a specific task.

1. Open a task window (either a new or an existing one)
2. Click the Categories button (lower right-hand corner of window) to open dialog box.
3. Choose one of the existing categories or click Master Category List button to create one of your own categories.

NOTE: Changed your mind about a color category assignment? Right-click the color or name of the color category, and then click **Clear *Name of Category*** or **Clear All Categories**.

H. Change the color of an overdue task

1. Change the color of items in the task list in Tasks view
   a. On the **Tools** menu, click **Options**.
   b. Click **Task Options**.
   c. Click a color in the **Overdue task color** box.
2. Change the color of items in the To-Do Bar
   a. In the **To-Do Bar**, right-click **Arranged By**, and then click **Custom**.
   b. Click **Automatic Formatting**, and then under **Rules for this view**, select the **Overdue tasks** check box.

NOTE: The color of overdue items in Calendar in the Daily Task List cannot be changed.

I. Mark a Task as Complete

You can change the status of a task at any time. There are 3 ways to mark a task as complete.

1. Open the task and Enter **100** in the **% Complete field**
2. Open the task and select **Completed** in the Status field
3. In the Folder Contents list, right-click and choose **Mark Complete** from the shortcut menu.

J. Change the color of a completed task

1. On the **Tools** menu, click **Options**.
2. Click **Task Options**.
3. Click a color in the **Completed task color** box.

K. Change a completed task to active

When you mark any to-do item complete, such as a flagged message or task item, the item is removed from the default views of the To-Do Bar and the To-Do List.

To re-activate a completed item:

1. In **Tasks**, in the Navigation Pane under **Current View**, click **Completed Tasks**.
2. To open the task, double-click the task that you want to change from completed to active.
3. Change **Status** to **Not Started**, **In Progress**, or **Waiting on Someone Else**.
4. On the **Task** tab, in the **Actions** groups, click **Save and Close**.

L. Show or don't show the completed tasks

By default, when you mark an item as complete, it remains on your task list with a strikethrough line. The exception is the To-Do Bar, where by default, completed tasks are not shown. You can choose whether to display your completed tasks in various views.

Show Task list in Tasks
In **Tasks**, in the **Navigation Pane**, under **Current View**, click **Active Tasks** or **Overdue Tasks** to exclude tasks that are marked as complete. All other selections include items that are marked as complete.

To show completed tasks in the Daily Task List:

1. In **Calendar**, in the **Daily Task List**, right-click **Show tasks on**.
2. Clear or select the **Show Completed Tasks** check box.

To show completed tasks in the To-Do Bar:

1. Right-click **Arranged By**.
2. Click **Custom**.
3. In the **Customize View: To-Do Task List** dialog box, click **Filter**.
4. Click the **Advanced** tab.
5. Click **Clear All**.
6. Click **OK** twice.

(Show completed tasks cont'd)

If you changed the advanced filter in the To-Do Bar to show completed tasks, and now you want to return to the default view of showing only the active tasks, do the following:

1. In the To-Do Bar, right-click **Arranged By**.
2. Click **Custom**.
3. In the **Customize View: To-Do Task List** dialog box, click **Filter**.
4. Click the **Advanced** tab.
5. Click **Field**, point to **All Task fields**, and then click **Date Completed**.
6. In the **Condition** list, click **does not exist**, and then click **Add to List**.
7. Click **Field**, point to **All Task fields**, and then click **Date Completed**.
8. In the **Condition** list, click **on or after**.
9. In the **Value** text box, type **today**, and then click **Add to List**.
10. Click **Field**, point to **All Mail fields**, and then click **Flag Completed Date**.
11. In the **Condition** list, click **does not exist**, and then click **Add to List**.
12. Click **Field**, point to **All Mail fields**, and then click **Flag Completed Date**.
13. In the **Condition** list, click **on or after**.
14. In the **Value** text box, type **today**, and then click **Add to List**.
15. Click **OK** twice.

M. Assigning Tasks to Others

You can assign a task to a team member as long as you're on the Exchange Server.

1. Create a task.
2. Click **Assign Task** on the Standard toolbar.
3. In the To box, enter the *email address* of the person to whom you assign the task.
4. Check the *Keep an updated copy of this task on my task list* option, if you want to keep a copy of the task with you.

You can click *the Send me a status report when the task is complete* option to request the status report.

N. Track tasks that you have assigned

There are three ways to track the tasks that you have assigned to other people:

1. Automatically keep copies of tasks that you assign, and receive automated status reports
   a. On the **Tools** menu, click **Options**.
   b. Click **Task Options**.
   c. Select the **Keep updated copies of assigned tasks on my task list** check box.
   d. Select the **Send status reports when assigned tasks are completed** check box.
2. View tasks that you have assigned to others
   a. Click **Tasks**.
   b. On the **View** menu, point to **Current View**, and then click **Assignment**.
3. View the list of people who receive updated copies of an assigned task
   a. Open the assigned task for which you want to view the list.
   b. On the **Details** tab, view the names in the **Update list** box.

O. Accept/Reject Assigned Tasks

When you assign a task to an individual, they can either accept or reject the task request. If they accept the task request, the task is no longer yours. When someone accepts or rejects the task, a message appears in your Inbox stating that the individual has accepted or rejected the task.

1. Open the task or task request.
2. On the **Task** tab, in the **Manage Task** group, click **Accept** or **Decline**.
3. Do one of the following:
   a. Click **Edit the response before sending**, type your comment in the message, and then click **Send**.
   b. Click **Send the response now**.

P. Reclaim a rejected task assignment

1. Open the e-mail message that contains the task request. This message is usually in your **Sent Items** folder.
2. On the **Task** tab, in the **Manage Task** group, click **Return to Task List**.

You can also reclaim the task from the declined task message by clicking **Return to Task List.**

Q. Send a status report or a comment about a task assignment

1. Open the task for which you want to send a status report or comment.
2. On the **Task** tab, in the **Manage Task** group, click Send **Status Report**, **Reply**, or **Reply to All**.
3. Enter recipient names or e-mail addresses in the **To** and **Cc** boxes.
4. If the task is assigned to you, then the names of people to be updated are added automatically.
5. In the body of the message, type any information that you want to include in the status report.
6. Click **Send**.

R. Forward a task to someone else to track

1. Open the task that you want to send.
2. On the **Task** tab, in the **Manage Task** group, click **Forward**.
3. Enter recipient names or e-mail addresses in the **To** and **Cc** boxes.
4. In the body of the task, type any message that you want to include. To send more than one task, drag the additional tasks from the task list to the body of the task that you are forwarding.
5. Click **Send**.

S. Change the display order of tasks

Do one of the following:

1. Sort all tasks in the task list
   a. In **Tasks**, on the **View** menu, point to **Current View**, and then click **Customize Current View**.
   b. Click **Sort**.
   c. In the **Sort items by** box, click a field by which you want to sort. If the field that you want is not in the **Sort items by** box, click a different field set in the **Select available fields from** box.
   d. Select **Ascending** or **Descending** for the sort order.
   e. To sort by an additional field, click a field in the **Then by** box.

NOTE: If you are in a table view type, you can click a column heading to sort by that column.

(Change the display order cont'd)

2. Move individual tasks up or down in the task list
   a. In **Tasks**, on the **View** menu, point to **Current View**, and then click **Customize Current View**.
   b. Click **Sort**, click **Clear All**, and then click **OK**.
   c. Click **Group By**, click **Clear All**, and then click **OK** twice.
   d. Drag a task up or down in the task list. Use the red line to position the task.
   e. To save this order as the default, on the **Actions** menu, click **Save Task Order**.
2. Move individual tasks up or down in the To-Do Bar task list
   a. Select an item in the To-Do Bar task list.
   b. Click and drag the item to the position that you want. A red line with arrows indicates where the task will be placed.
   c. Release the mouse button when the pointer reaches your choice of the destination for the task.
3. Move individual tasks up or down in the Daily Task List
   a. In Calendar, in the Day or Week view, select an item in the Daily Task List.
   b. Click and drag the item to the position that you want. A red line with arrows indicates where the task will be placed.
   c. Release the mouse button when the pointer reaches your choice of the destination for the task.
4. Prioritize your tasks
   If you want to sort your tasks in priority order, first you need to specify a priority level for each task. By default, tasks have a **Normal** priority level; however, you can change this level to **Low** or **High**.
   a. Open the task for which you want to change the priority level.
   b. In the **Priority** box, click a priority level.

T. Smartphones

- Windows Mobile devices configured to work with Exchange and Blackberries connected to the campus BES service will automatically have their tasks on their smartphones.
- iPhones do not currently have the ability to access Exchange tasks.
- Other smartphones may or may not work with tasks.