

## About Microsoft Office Tasks

Customize Tasks with advanced features to manage your time and schedule. This guide lays out simple steps to help organize your to-do items for easier handling. For illustration purposes, a sample screen is provided using different tools and methods.

**Minimize or Maximize Your Navigation Pane** according to preference.

**Arrange Your Tasks** by date, importance, or categories.

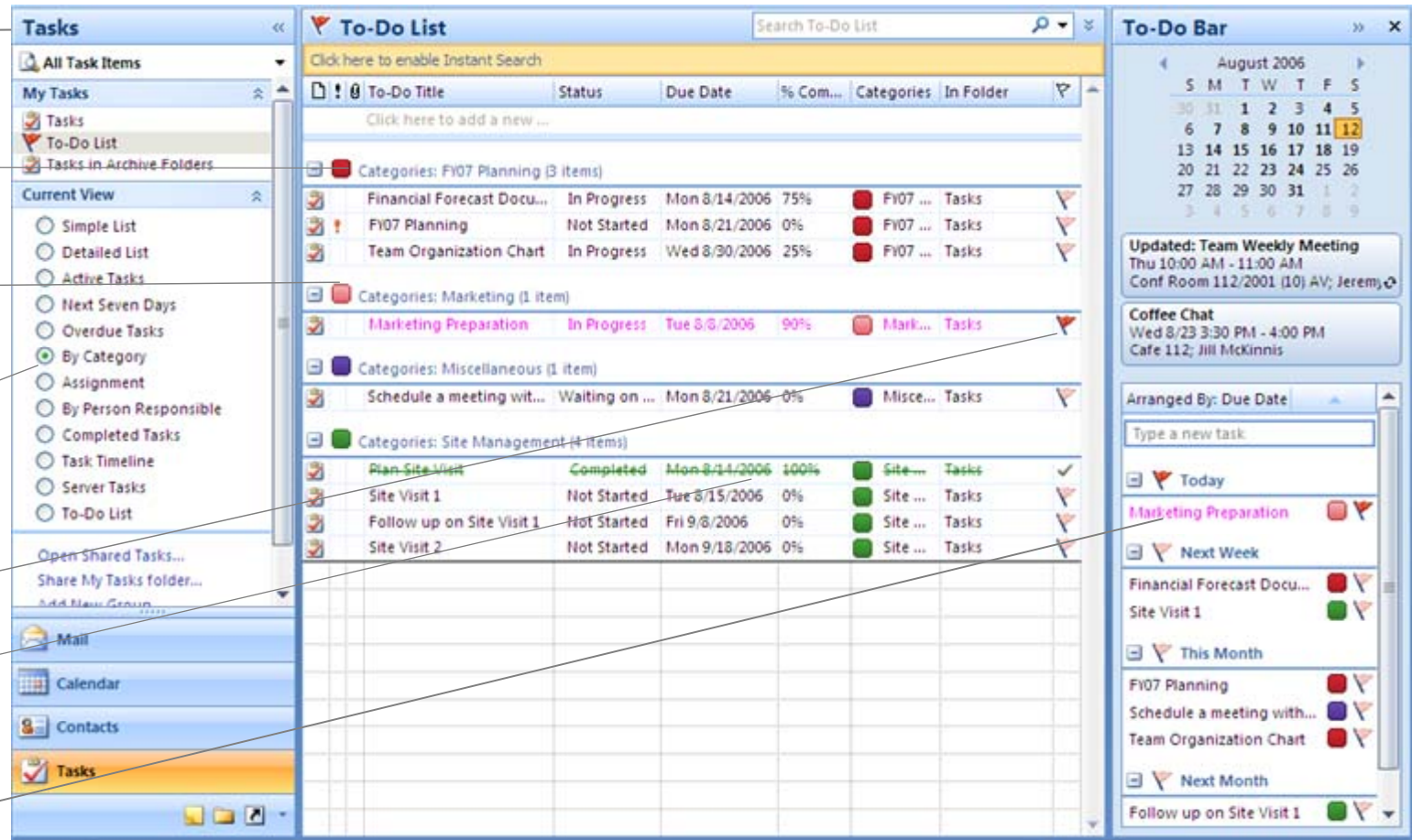
**Categorize Your Tasks** for better organization of your schedule.

**Customize Your Current View** to personalize the To-Do List.

**Manage Your Tasks** by setting reminders and priorities.

**Change Your Colors** for overdue or completed tasks.

**Customize Your To-Do Bar** for a quick view of today's tasks.



To-Do Title	Status	Due Date	% Com...	Categories	In Folder
Categories: FI07 Planning (3 items)					
Financial Forecast Docu...	In Progress	Mon 8/14/2006	75%	FI07 ...	Tasks
FI07 Planning	Not Started	Mon 8/21/2006	0%	FI07 ...	Tasks
Team Organization Chart	In Progress	Wed 8/30/2006	25%	FI07 ...	Tasks
Categories: Marketing (1 item)					
Marketing Preparation	In Progress	Tue 8/8/2006	90%	Mark...	Tasks
Categories: Miscellaneous (1 item)					
Schedule a meeting wit...	Waiting on ...	Mon 8/21/2006	0%	Misce...	Tasks
Categories: Site Management (4 items)					
Plan Site Visit	Completed	Mon 8/14/2006	100%	Site...	Tasks
Site Visit 1	Not Started	Tue 8/15/2006	0%	Site ...	Tasks
Follow up on Site Visit 1	Not Started	Fri 9/8/2006	0%	Site ...	Tasks
Site Visit 2	Not Started	Mon 9/18/2006	0%	Site ...	Tasks

## Manage Your Tasks

Set reminders and priorities to help ensure tasks don't slip through the cracks and that you always know which tasks are most important.

- To set a reminder for a task, open the task and select the **Reminder** check box. Then use the pull-down menus to select the date and time for the reminder.
- To set a priority for a task, open the task and use the **Priority** pull-down menu to set the priority to **Low**, **Normal**, or **High**.
- To mark a task complete, on the To-Do List, right-click the flag for the task, and click **Mark Complete**.

**Note** You can also mark the task complete from inside the task. Open the task, and under the **Status** field, click **Completed**, and then click **Save & Close**.

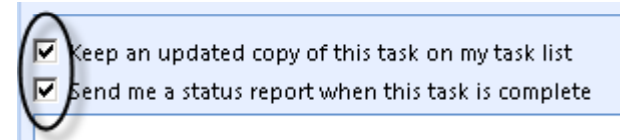
## Assign Tasks

Assign tasks to other people and be informed when they have completed the assigned tasks.

To assign a task to another person:

- 1** For a new task, on the **File** menu, point to **New**, and then click **Task Request**.
- 2** For an existing task, open the task, and then click **Assign Task**.
- 3** In the **To** box, type the person's name or alias. In the **Subject** box, type the subject of the task.

- 4** Select or clear **Keep an updated copy of this task on my task list** and **Send me a status report when this task is complete** check boxes.



**Note** If you prefer not to have an updated copy or status report on your task list, you can always view tasks you have assigned to others. On the **View** menu, point to **Current View**, and then click **Assignment**.

- 5** Add a specific start date, due date, reminder, or any additional information, and then click **Send**.

### Notes

- To reclaim ownership of a rejected task, open the message that contains the declined task request and click **Cancel Assignment**.
- To forward a task for others to track, open the task. On the **Task** tab, in the **Manage Task** group, click **Forward**. Enter the assignee's name in the **To** field.

## Send a Task Status Report

- To accept or decline a task assigned to you, open the task or task request, and then click **Accept** or **Decline**.
- To update progress on a task (send a status report), open the task, and then click **Send Status Report**.

## Change a Task to a Recurring Task

- 1 Open the task, and then click **Recurrence**.
- 2 In the **Task Recurrence** dialog box, choose options from the **Recurrence pattern** section and **Range of recurrence** section, and then click **OK**.
- 3 Click **Save & Close**.

### Notes:

- To skip one occurrence of a recurring task, open the task and click **Skip Occurrence**.
- To stop the recurrence, open the task, click **Recurrence**, and then click **Remove Recurrence** at the bottom of the window.

## Customize the To-Do Bar

To select the size of your To-Do Bar, or to turn it off:

- Right-click the title bar of the pane, and then click **Normal**, **Minimized**, or **Off**.

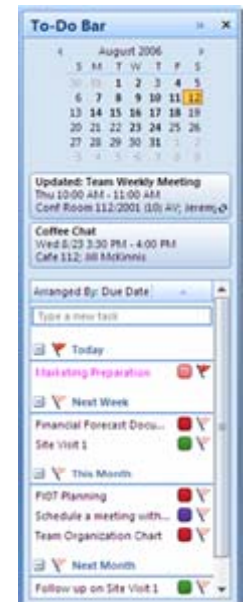
**Note** The **Minimized** To-Do Bar displays only the next appointment and number of tasks due that day. To manually adjust the size of the To-Do bar, click the bar's left border and drag it.

To customize your panes inside the To-Do Bar:

- 1 Right-click the title bar of the pane.
- 2 Click or clear **Date Navigator**, **Appointments**, or **Task List**.

### Notes

- To change display options for the **Date Navigator**, **Appointments**, and **Tasks List**, right-click on the To-Do bar, and then click **Options**.
- Tasks in the To-Do Bar can be arranged separately from the To-Do List by clicking the **Arranged By** heading.



## Customize Views

Tasks may be customized according to your functions, preferences, and organization techniques.

### Minimize or Maximize Your Navigation Pane

- 1 To change the size of your Navigation Pane, click **View**, and then point to **Navigation Pane**.
- 2 Select **Normal**, **Collapsed**, or **Off**.

## Customize Your Tasks Current View

- In the left navigation menu, select a view in the **Current View** pane to customize your To-Do List.

**Note** To hide completed tasks, select **Active Tasks**.

- To eliminate Current View from the Navigation Pane, click **View**, then point to **Navigation Pane**, and then un-check **Show Views in Navigation Pane**.

Personalize your tasks with fonts, formatting, and fields.

- In the **Current View** pane, click the **Customize View: Simple List** link.

## Categorize Your Tasks

**Assign names, colors, and shortcut keys to your tasks.**

- 1** On the toolbar, click **Categorize** , and then click **All Categories**.
- 2** To create a new category, click **New**, and then select a color and name that indicates the category's purpose or task.
- 3** To assign a shortcut key, click the pull-down menu next to **Shortcut Key** and select one of the shortcut options.

**Tip** To reassign a task to a new category, drag the task to a different category within the To-Do List.

## Categorize a Task with One Click

Categorize a task or any Microsoft® Office Outlook® 2007 item with one mouse click using Quick Click. Set any of your existing categories to Quick Click.

To set one colorized category as the current Quick Click category:

- 1** On the toolbar, click **Categorize** , and then click **Set Quick Click**. If your default category is not listed, create a new category.
- 2** In the **Set Quick Click** dialog box, in the category list, click a category.

**Note** You can change your Quick Click selection at any time.

## Change Task Default Colors

The default color for overdue tasks is red, and the default color for completed tasks is gray. To change either of these colors:

- 1** On the **Tools** menu, click **Options**.
- 2** On the **Preferences** tab, under **Tasks**, click **Task Options**.
- 3** In the **Tasks Options** dialog box, in the **Overdue task color** list or **Completed task color** list, select a color, and then click **OK**.