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.

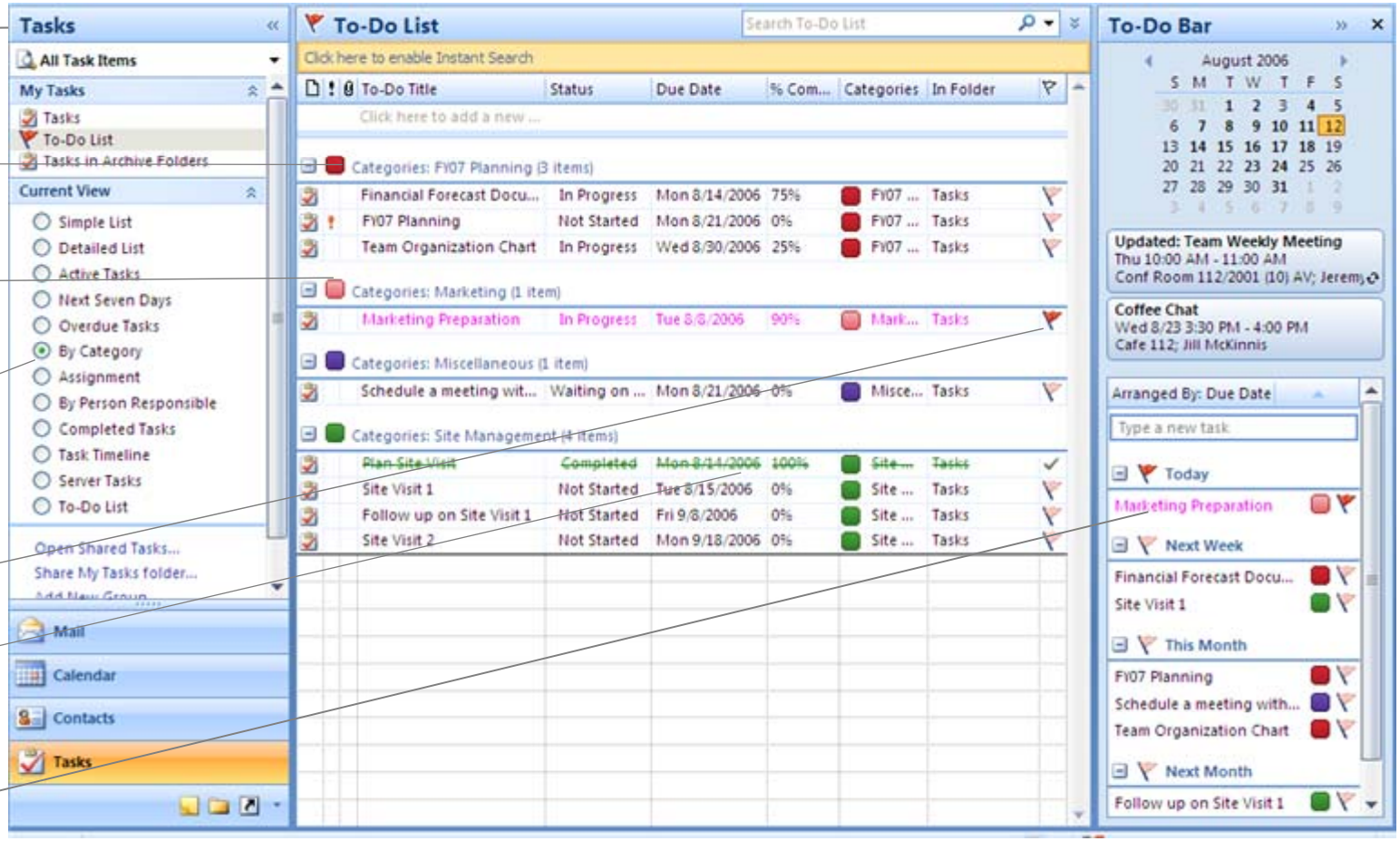
Categorize Your Tasks for better organization of your schedule.

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.



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**.

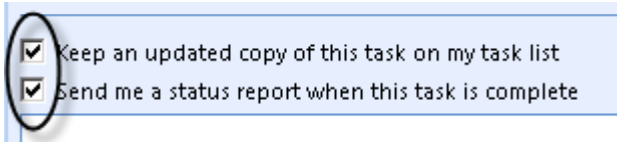
  Note You can also mark the task complete from inside the task. Open the task, and under the **Status** field, click **Completed**, and then click **Save & Close**.

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.**