

About Microsoft Office Tasks

Tasks in the Microsoft Office system are similar to a to-do list. Tasks make it easy to use Microsoft® Office Outlook® 2007 to organize your time and your work. Tasks are integrated across Outlook 2007, Microsoft® Office SharePoint® Server 2007, and Microsoft® Office OneNote® 2007—enabling you to smoothly work between applications.

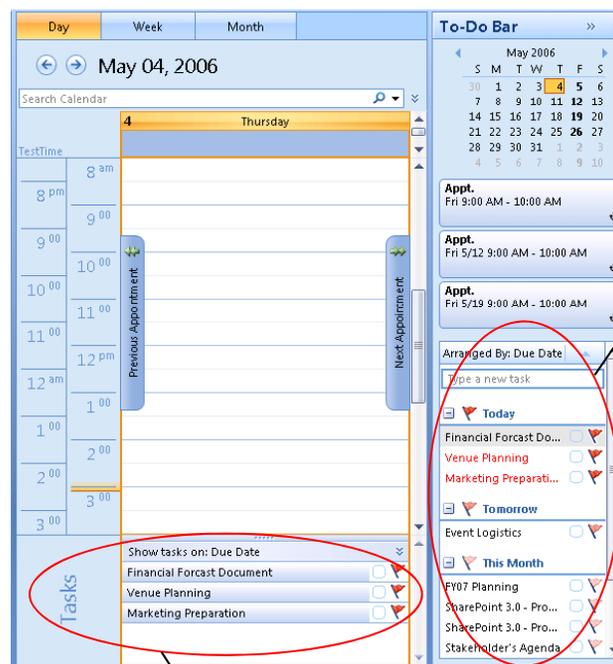
Topics in this guide include:

- About the To-Do Bar in Outlook 2007
- Create a Task in Outlook 2007
- Flag Incoming E-Mail Messages for Follow-Up
- Attach Files and E-Mail Messages to a Task
- Use Outlook 2007 to Work with SharePoint Server 2007 Tasks
- Create an Outlook 2007 Task from Microsoft® Office OneNote® 2007

About the To-Do Bar in Outlook 2007

The To-Do Bar includes calendar and task information. Tasks include regular tasks in the task folder and e-mail messages flagged for follow up.

Most of the procedures in this guide use the To-Do Bar. If the To-Do Bar is not displayed on your screen, go to the **View** menu, point to **To-Do Bar**, and then click **Normal**.



To-Do Bar Task List
Includes flagged e-mail messages, tasks, and downloaded SharePoint Server 2007 tasks.

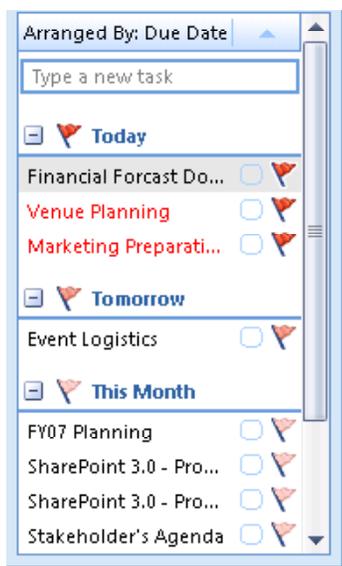
Daily Task List Displayed in Calendar

Completed tasks stay on the day of completion in your calendar and are recorded as work performed on that day. Tasks not completed move on to the next day until they are completed.

Create a Task In Outlook 2007

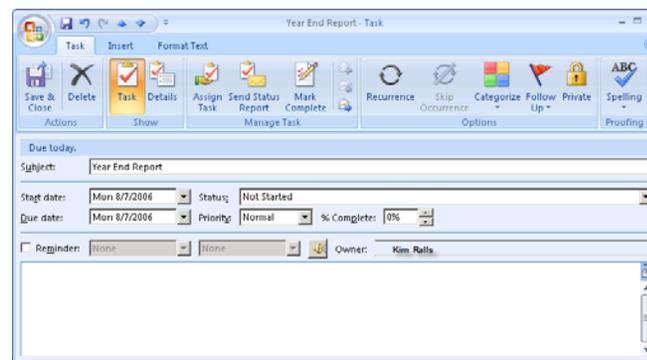
- 1 On the **To-Do Bar**, in the **Type a new task** box, type the name of the new task, and then press ENTER to complete creating your task.

The task appears in the To-Do Bar Task List with a default due date of the current date.



Note If the **Type a new task** box does not appear, on the To-Do Bar Task List, right-click the **Arrange By** bar, click **Custom**, and then click **Reset Current View**. Click **OK**.

- 2 To add a specific start date, due date, reminder, or any additional information, double-click the task in the To-Do Bar Task List. Make changes in the task window, and then click **Save & Close**.

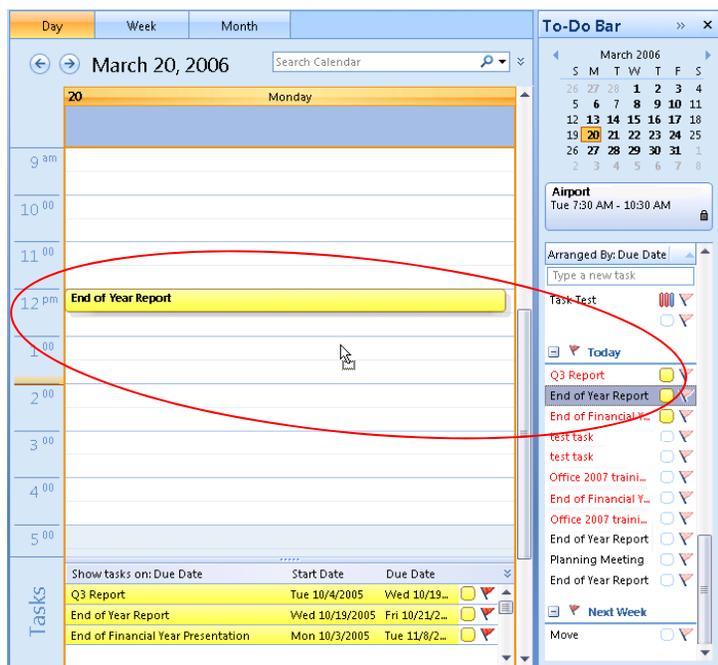


Tip To create a task from an Outlook 2007 item, drag the item (such as an e-mail message, contact, or calendar event) onto the Task List in the To-Do Bar.

Schedule Time for an Outlook 2007 Task

Schedule time in your Outlook 2007 Calendar to work on a task, or schedule a meeting to talk about a task.

- 1 On the Outlook navigation pane, click **Calendar**.
- 2 Drag the task you want to schedule time for from the To-Do Bar Task List to the **Calendar**.

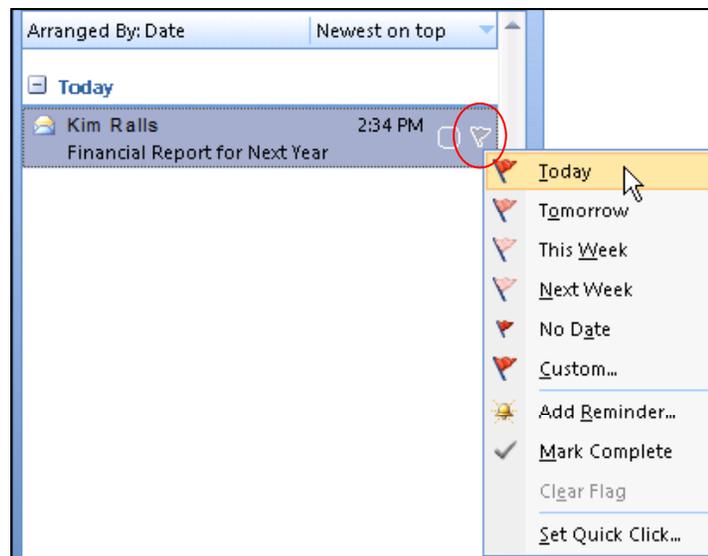


- 3 Double-click the calendar appointment you created. On the **Appointment** tab, select the options you want, and then click **Save & Close**.

Flag Incoming E-Mail Messages for Follow-Up

Use flags to add an incoming e-mail message to the Tasks list. When you flag an e-mail message, it appears in the Daily Tasks List in the Calendar and in the To-Do Bar Task List.

- 1 Right-click the flag icon on an unopened e-mail message.
- 2 Click the flag with the preferred due date. To choose specific start dates and due dates, click **Custom**.



Tips

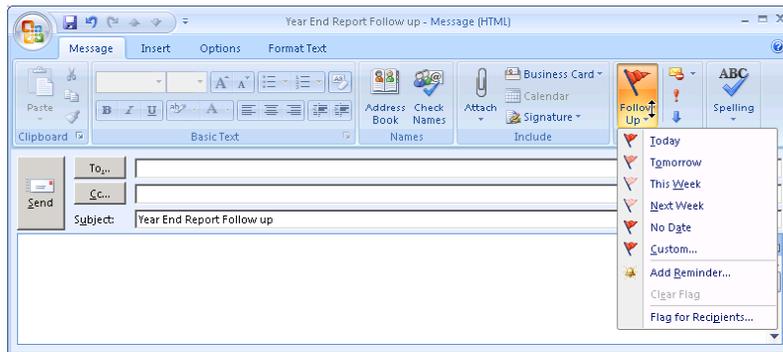
- To apply the default flag (Today), click the flag icon on the e-mail message. To mark the task complete, click the flag again and a check mark appears.
- To change the default flag, click the flag icon on the e-mail message, and then click **Set Quick Click**.

Flag Outgoing E-Mail Messages as a Reminder

To remind yourself to follow up on e-mail messages you're sending, add flags when you send e-mail messages.

Note When you flag e-mail messages, the flags are only viewable by you—unless you specifically set a flag for the recipients as well.

- 1 Create a new e-mail message.
- 2 On the Ribbon, on the **Message** tab, click **Follow Up**, and then click the time on which you want to follow up.



Notes

- If you want to also set a flag for the recipients, click **Follow Up**, and then click **Flag for Recipients**.
- To set a specific date for follow up, click **Custom**, and then click a date that you want.

Attach Files and E-Mail Messages to a Task

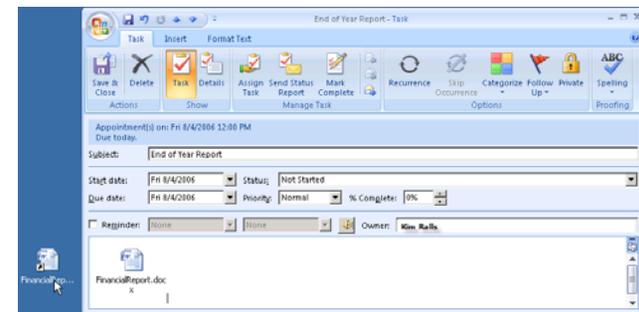
Attach related files and e-mail messages to a task—task-related content is conveniently located in one place.

- 1 Open a task.

Note This procedure will not work with flagged e-mail messages. To make sure you actually opened a task, the window must be labeled with “[Task Name] - Task” at the top and include a **Task** tab.

- 2 Select the file or e-mail message, and then drag it into the **Task** window.

Tip You may need to resize your windows to drag items into the **Task** window.



- 3 Click **Save & Close**.

Mark a Task Complete

- On the To-Do Bar Task List, right-click the flag to the right of the task, and then click **Mark Complete**.

The task no longer appears in the To-Do Bar Task list and appears as complete in the tasks **To-Do List**.

Tips

- To mark a task complete, right-click on the task and then click **Mark Complete**. Or in the Outlook navigation pane, click **Tasks**, and then select the check box to the left of the task.
- To delete a task, click **Tasks** in the Outlook navigation pane, right-click the task, and then click **Delete**.



Use Outlook 2007 to Work with SharePoint Server 2007 Tasks

With Outlook 2007, you can now view and change tasks that exist on your Team Site. Any changes that you make to tasks in Outlook 2007 are automatically synchronized with SharePoint Server 2007.

To use Outlook 2007 to view and edit SharePoint Server 2007 tasks, you must connect Outlook 2007 to the SharePoint Server 2007 Task list. After you do, the SharePoint Server 2007 tasks appear in your Outlook 2007 Tasks list.

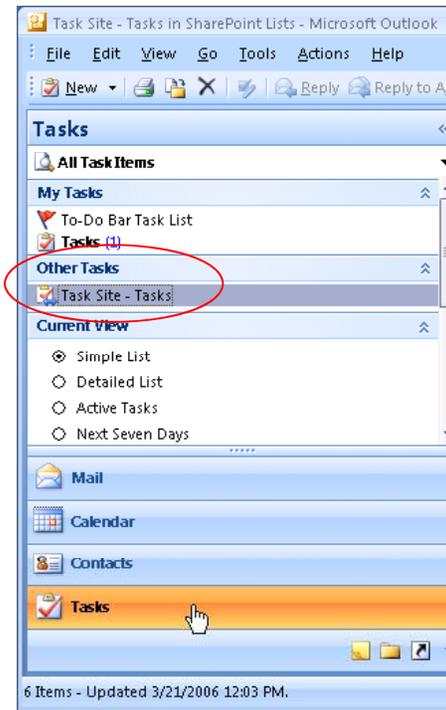
Note Working with SharePoint Server 2007 tasks in Outlook 2007 requires a SharePoint Server 2007 site.

Connect Outlook 2007 to a SharePoint Server 2007 Task List

- 1 On a Team Site or My Site, in the left navigation pane under **Lists**, click **Tasks**.
- 2 On the menu bar, click **Actions**, and then click **Connect to Outlook**. In the **Microsoft Office Outlook** dialog box, click **Yes**.

All tasks are now added to your Outlook 2007 Tasks List. Only the tasks assigned to you are displayed in the To-Do Bar task list and the Daily Task List.

Repeat the procedure above for each SharePoint Server 2007 Task List you want to connect to Outlook 2007.



Outlook Tasks List

Notes

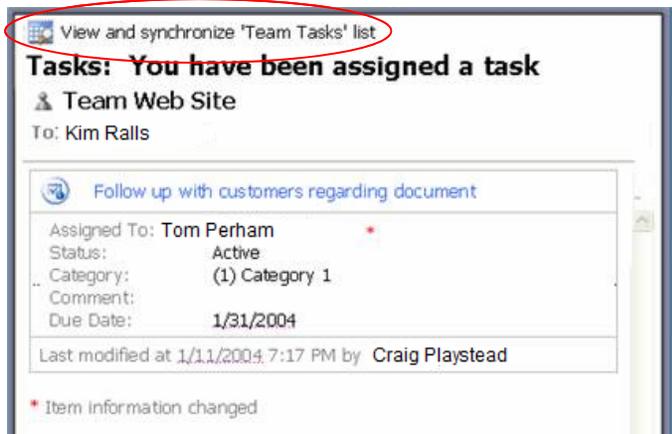
- If you receive a task e-mail message from a SharePoint 2007 site, you can automatically connect Outlook 2007 to a SharePoint 2007 Task list. See the next topic, "Respond to a Task E-Mail Message from a SharePoint Server 2007 Site."
- As with any SharePoint Server 2007 site, you need the proper permissions to view, edit, add, and delete items. If you do not have the correct permissions to the SharePoint Server 2007 task list, you need to request access from the site administrator.

Respond to a Task E-Mail Message from a SharePoint Site

When you receive a task e-mail message from a SharePoint Server 2007 site in your inbox, you can add the task to your Outlook 2007 task list. When you add the task, Outlook 2007 automatically creates a connection to the SharePoint 2007 Task List. All the tasks in the SharePoint 2007 Task List will be displayed and synchronized in your Outlook 2007 Task List.

Only the tasks assigned to you that you received in your inbox are displayed in the To-Do Bar Task List and the Daily Task List.

- In the reading pane of Outlook 2007, in the SharePoint Server 2007 task e-mail message, click **View and Synchronize** '[Task List Name]' list.



After you click the link, the task on the SharePoint Server 2007 site is added to your To-Do Bar task list. A folder with the SharePoint Server 2007 Task List name also appears under **Other Tasks** in the tasks navigation pane.

Note To opt-out of receiving SharePoint Server 2007 Tasks in Outlook 2007, click **Modify Notification Settings** in the body of the SharePoint Server 2007 task e-mail message.

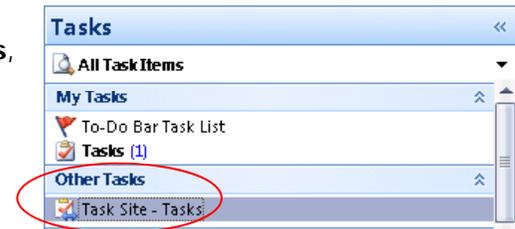
Use Outlook 2007 to Create SharePoint Server 2007 Tasks

You can create and assign tasks from Outlook 2007 to a SharePoint Server 2007 task list. This allows you to use Outlook 2007 to manage tasks that exist on a SharePoint Server 2007 site.

Note To complete the procedure below, you must be connected to a SharePoint Server 2007 task list. See "Connect Outlook to a SharePoint Server 2007 Task List" earlier in this guide.

1 On the Outlook 2007 navigation pane, click **Tasks**.

2 In the **All Task Items** section, under **Other Tasks**, click the SharePoint site where your tasks reside.



3 On the **File** menu, point to **New**, and then click **Task**.

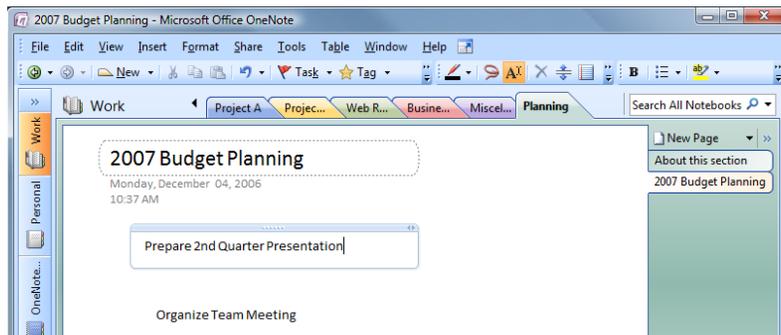
4 In the task window, add a specific start date, due date, any additional information, or assign the task, and then click **Save & Close**. Any changes made to the task in Outlook are saved to the SharePoint tasks list.

Note Only the tasks assigned to you are displayed in the To-Do Bar task list and the Daily Task List.

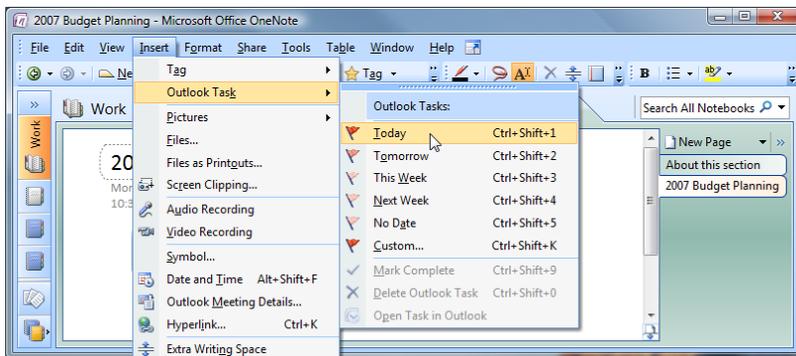
Create an Outlook 2007 Task from OneNote 2007

Create Outlook 2007 tasks using OneNote 2007, and then view and manage the tasks using Outlook 2007. Changes you make to these tasks in Outlook 2007 or OneNote 2007 are synchronized automatically.

- 1 Click the note to which you would like to add a task.

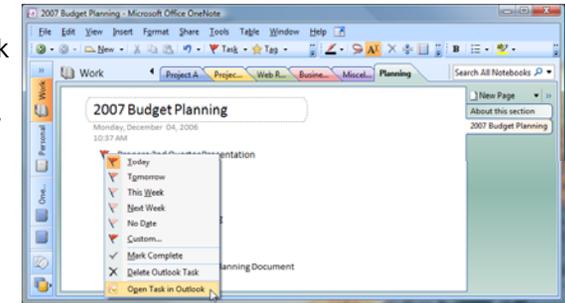


- 2 On the **Insert** menu, point to **Outlook Task**, and then click a flag. The flagged task now appears in Outlook 2007 on the task list and the To-Do Bar Task List.



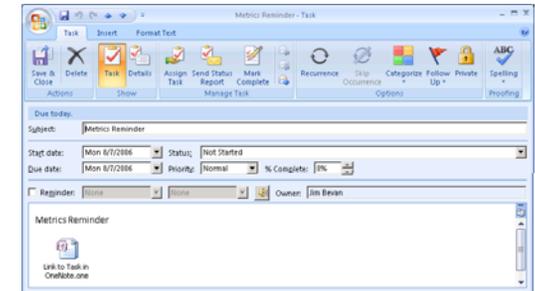
- 3 To add task details in OneNote 2007, right-click the flag, and then click **Open Task in Outlook**, -OR-

To add task details in Outlook 2007, double-click the task in the **To-Do Bar** task list.



- 4 In the task window, add a reminder, any additional information, specific start or due dates, or assign the task, and then click **Save & Close**.

The task is now in your OneNote 2007 notes and Outlook 2007 To-Do Bar task list. You can manage the task using Outlook 2007.



Notes

- Make minor changes to the task in OneNote 2007 without opening the task in Outlook 2007. In OneNote 2007, right-click the flag next to the note, and then click a flag, mark the task complete, or delete the task. The change is automatically saved in Outlook 2007. To make more detailed changes, open the task in Outlook 2007 as described earlier in this guide.
- To go from the open task in Outlook 2007 to the OneNote 2007 page where the task resides, double-click the OneNote 2007 icon in the task body. See the image earlier in this guide.