CREATE & MANAGE TASKS
FOR MICROSOFT OUTLOOK

FOLSOM CORDOVA UNIFIED SCHOOL DISTRICT | ETIS
Creating & Managing Tasks

Many people will often write a list of things to do on a piece of paper—tasks are the electronic equivalent. Keeping track of tasks (electronically) in Outlook offers the benefit of tracking the tasks with reminders or automatically generating recurring tasks.

Create & View Tasks

There are several methods for creating a task along with where tasks appear in Outlook. Use any of the following bulleted methods for locating and creating tasks:

1. In Outlook, in the lower-left Navigation Pane, click Tasks and do the following:
   1. Click in the Type a new task box, and type the desired task text as shown in Figure 1.
   2. Press Enter when done.
      
      The task appears in the Task Pane list.

2. Create and view tasks from the To-Do Bar in any window (Mail, Tasks, Calendar, or Contacts) as follows:
   1. If the To-Do Bar is not displayed, go to the View menu, click To-Do Bar, and click Normal.
   2. In the To-Do Bar, click in the Type a new task box, and type the desired task text as shown in Figure 2.
   3. Press Enter when done.

Figure 1

Figure 2
Similarly, create and view tasks from the Daily Task List Pane found in the Calendar window as follows:

1. If necessary, in the lower-left Navigation Pane, click Calendar.

MORE KNOWLEDGE: If the Daily Task List Pane is not displayed, go to the View menu, click Daily Task List, and click Normal. The option will not be available (grayed out) if Calendar is set to Month view.

2. In the Daily Task List Pane, click in a desired day and type the task entry text as shown in Figure 3.

3. Press Enter when done.

Create or modify tasks using a Task form. A Task form offers the ability to include additional information. Open a Task form using one of the following methods:

- Double-click an existing task item to display a Task form to modify for desired changes.
- In the lower-left Navigation Pane, click Tasks, click the New button as shown in Figure 4.
- In any Outlook view, click the New arrow button (to the right of the New button), and click Task from the displayed menu.
- Open a new Task form by using the keyboard shortcut: Ctrl + Shift + K.
Using A Task Form

Use a Task form to add or modify information on a task, or to set up a recurring task pattern—such as a daily, weekly, monthly or yearly task. The following offers a general Task form overview:

1. Use any of the described methods on page 3 to open a Task form.
2. Click in the Subject box and type a task subject.
3. By default, no date is given to the Start date and Due date fields. If a date is desired, click the arrow button to the right of a date field and choose the desired date.

   NOTE: If a date is chosen for the Start date, the same date automatically populates the Due date. Adjust the Due date accordingly (if a different date is desired).
4. By default, the task Status is set to Not Started. If desired, click the Status box to choose from the displayed menu list of options as shown in Figure 5.
5. To add a reminder alert, click to check the Reminder option, and if needed, adjust the reminder date and time options.
6. If desired, type any additional information—not provided by the form—in the bottom message box as shown in Figure 6.

MORE KNOWLEDGE: On the Task form ribbon, click the Details button to enter project information such as mileage, billing, and total hours worked.
7. To set up and automate a recurring task, click the **Recurrence** button. A *Task Recurrence* dialog box displays for navigating the following options:

- In the upper-left section of the *Task Recurrence* dialog box, under **Recurrence pattern**, click to choose the appropriate pattern option—**Daily**, **Weekly**, **Monthly** or **Yearly**.

- In the upper-right section of the dialog box, choose from options that *update* based on the **Recurrence pattern** (selected in the previous step). **Figure 7** offers an example of a **Monthly** pattern in which the task occurs on the 25th of every month.

- In the bottom section, under **Range of recurrence**, choose how often the task pattern will repeat. By default, **No end date** is selected. However, options are available for limiting the number of times to repeat the pattern or to end the pattern on a specified date.

- Click **OK** when done.

**NOTE:** The recurrence settings are summarized in the *Task* form. Also, the **Skip Occurrence** button is actively available in the *Task* form ribbon in the event a patterned task needs to be skipped. Clicking the button moves the due date to the next instance.

8. In the *Task* form, click **Save & Close** when finished as shown in **Figure 8**.

CONTINUE TO THE NEXT PAGE
9. By default, tasks are displayed in the To-Do List view and arranged by Due Date as shown in Figure 9.

**NOTE:** Follow Up flags are automatically assigned when tasks are created. Red flags are assigned to current day tasks, with lighter flag colors as the due date moves away from the current date. If desired, right-click a flag to manually change a Follow Up setting from the displayed menu options.

10. In the Navigation Pane, click to experiment from the Current View list of options. Click the To-Do List option to return to the default view.

11. Additionally, right-click the Arranged By header to view different menu sorting options.

**Modify Or Delete A Recurring Task**

1. In the lower-left Navigation Pane, click Tasks.

2. In the To-Do List Pane, locate and double-click a recurring task to open the Task form.

3. In the displayed Task form, click the Recurrence button to display the Task Recurrence dialog box and do one of the following:
   - To modify task recurrence settings, click the desired settings and click OK. Click Save & Close in the Task form.
   - To delete task recurrence settings, in the Task Recurrence dialog box, click the Remove Recurrence button as shown in Figure 10. Click Save & Close in the Task form.
Create Tasks From Email

1. In the lower-left Navigation Pane, if necessary, click Mail to view desired mail in the Inbox Pane.

2. In the Inbox Pane, locate and click to select the desired email. Drag the email to the Tasks button (in the lower-left Navigation Pane) as shown in Figure 11.

   A Task form displays with the email’s subject title automatically populated in the Subject box. The content of the email will appear in the bottom message box (of the form).

3. In the Task form, edit any of the fields as desired—for example, adding a due date, reminder alert, and editing or removing any email information from the form’s message box.

4. Click Save & Close when finished as shown in Figure 12.

   MORE KNOWLEDGE: This same technique can be applied to:

   ✐ Creating appointments from an email—by dragging the email to the Calendar button to populate an Appointment form.

   ✐ Or creating a contact from an email—by dragging the email to the Contacts button to populate a Contact form.

THE TASK HAS BEEN COMPLETED!