How to

Manage Tasks in Office 2007

About Managing Tasks

Customize Office 2007 Tasks with advanced features to manage your time and schedule.

Topics in this guide include:

- Schedule Time for an Outlook Task
- Attach Files and E-Mail Messages to a Task
- Assign and Track Tasks
- Mark a Task Complete
- Customize the To-Do Bar
- Customize Views
- Categorize Your Tasks
- Change Task Default Colors

Note 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**.

Schedule Time for an Outlook Task

Schedule time in your Outlook 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 for which you want to schedule time from the To-Do Bar Task List to the Calendar. See Figure A.

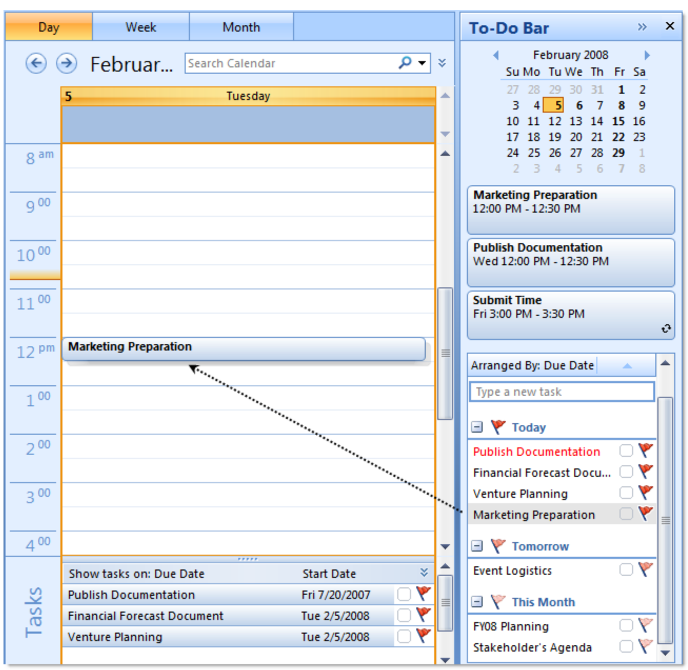

Figure A

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

Attach Files and E-mail Messages to a Task

Attach related files and e-mail messages to a single task to keep task-related content 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. See Figure B.

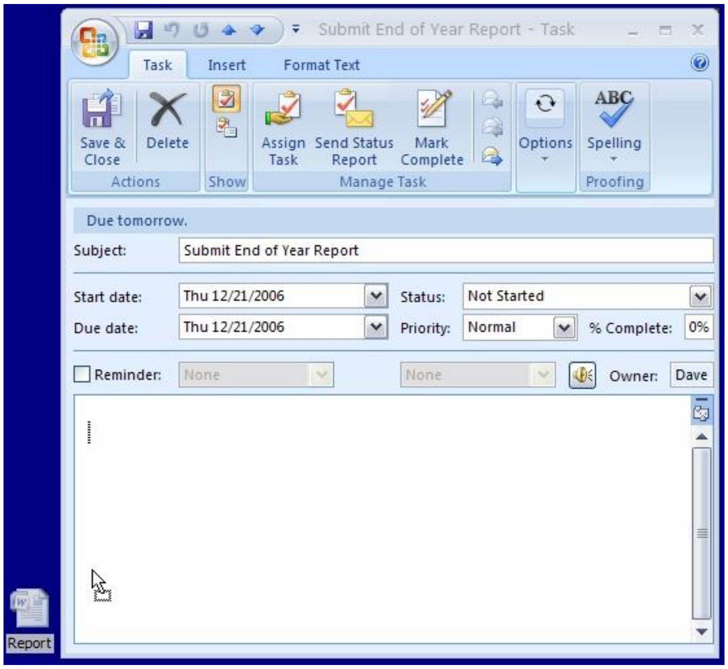

Figure B

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

3. Click **Save & Close**.

Assign and Track Tasks

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

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 the **Keep an updated copy of this task on my task list** and **Send me a status report when this task is complete** check boxes. See Figure C.

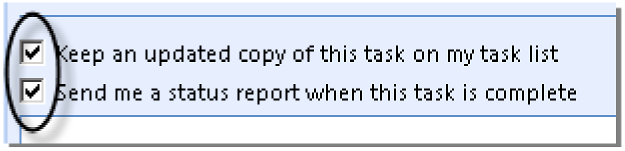

Figure C

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.

Automatically set reminders for all new tasks with a due date

Use your Task options to automatically set a reminder for each new task that has a due date.

1. On the **Tools** menu, click **Options**.
2. In the **Options** dialog box, click **Task Options**.
3. Select or clear the **Set reminders on tasks with due dates** check box, and then click **OK**.

   Note If you assign a task to someone else, Outlook switches the reminder off so the person who accepts the task can set a reminder.

Accept or decline a task

1. When you receive a task assignment, open the task or task request.
2. Click **Accept** or **Decline**.
3. Click either **Edit the response before sending** (type your comment in the message, and then click Send), or **Send the response now**.

Track an assigned task

1. On the **Tools** menu, click **Options**.
2. On the **Preferences** tab, click **Task Options**.
3. Select the **Keep updated copies of assigned tasks on my task list** check box.
4. Select the **Send status reports when assigned tasks are completed** check box.

Send a status report for a task

1. Open the task for which you want to change the status or completion percentage.
2. In the **Status** and **% Complete** boxes, enter your information.
3. In the Manage Task group, click **Send Status Report**.
4. Enter recipient names in the **To**, **Cc**, and **Bcc** boxes, and then click **Send**.

Note If the task was assigned to you, the names of people on the update list are automatically added.

Mark a Task Complete

To 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**. See Figure D.

The task no longer appears in the To-Do Bar Task List, and it appears as complete in the Daily Task 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**.

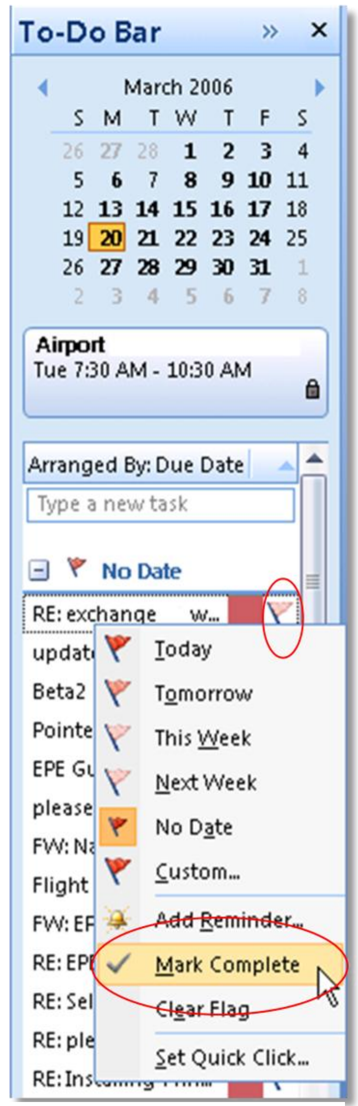

Figure D

Customize the To-Do Bar

Follow these steps to customize or turn off the To-Do Bar.

1. Right-click the title bar of the pane.
2. Make one or more of the following selections:
   - To select the size of your To-Do Bar, click **Normal** or **Minimized**.

     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 the panes inside the To-Do Bar, click or clear **Date Navigator**, **Appointments**, or **Task List**.
   - To change display options for the Date Navigator, Appointments, and Tasks List, right-click on the To-Do bar, and then click **Options**.
   - To turn off your To-Do Bar, click **Off**.

Note 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.

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

- To customize your To-Do List, in the left navigation menu, select a view in the Current View pane.
  Note To hide completed tasks, select **Active Tasks**.
- To eliminate Current View from the Navigation Pane, click **View**, point to Navigation Pane, and then un-check **Show Views in Navigation Pane**.

Categorize Your Tasks

Assign properties and shortcut keys to your tasks, and use Quick Click to categorize any Outlook item with a single click.

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 **Shortcut Key** pull-down menu, 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 Outlook 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 **Task Options** dialog box, select a color in the **Overdue task color** list or **Completed task color** list, and then click **OK**.