



Quick Reference Guide 8

Outlook 2013 for Windows

Tasks



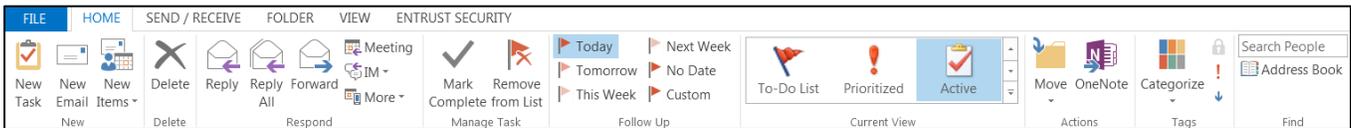
Outlook Tasks Folder

As with other Outlook main folders, the **Tasks** folder has multiple tabs with various commands which displays as a ribbon; the commands are organized in logical groups. Below are screenshots of the command tabs for the **Tasks** folder.

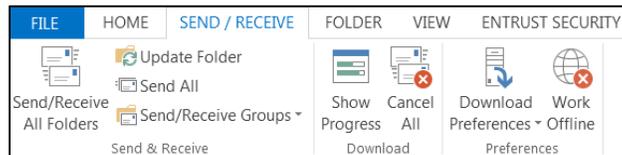
To display the **Tasks** folder, click , **Tasks** the **Tasks icon** below the Folders in the *Navigation*, or press **Ctrl+4**.

Tasks Command Tabs and Ribbon

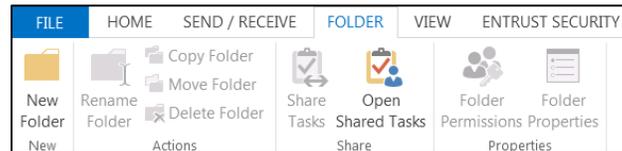
Tasks Home Command Tab: New, Delete, Respond, Manage Task, Follow Up Current View, Actions, Tags and Find



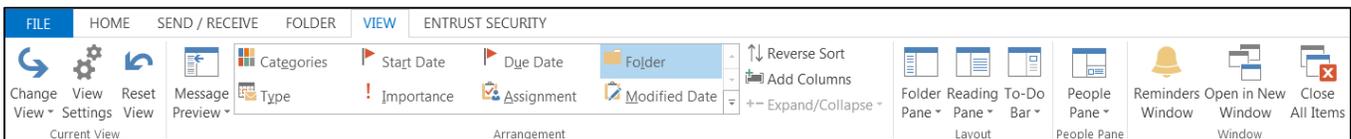
Send / Receive Command Tab: Send & Receive, Download and Preferences



Folder Command Tab: New, Actions, Share and Properties



View Command Tab: Current View, Arrangement, Layout, People Pane and Window



Customize the Quick Access Toolbar New Tasks

As with the **Quick Access Toolbars** throughout Office 2013, each Outlook new item window has its own **Quick Access Toolbar** that can be customized by the user. Steps to customize the Quick Access Toolbars throughout Outlook are outlined in the Outlook 2013 for Windows QRG 1 – Getting Started.

The Task Views

When displaying the Tasks, the Home Tab and the View Tab include commands for several default views: **Detailed, Simple List, To-Do List, Prioritized, Active, Completed, Today, Next 7 Days, Overdue** and **Assigned** views. In addition, the **To-Do Bar** can be enabled and include **Calendar, People** and **Tasks** frames. To learn how to customize views, see the Outlook 2013 for Windows QRG 4 – View Customizations.



For software training, contact the Computer Training Center (CTC) at 358-1111 or visit the CTC Web site at <http://itcd.hq.nasa.gov/ctc>.

This document is posted on the ITCD Web site <http://itcd.hq.nasa.gov/ctc>.

Detailed Task View

Task Subject	Status	Due Date	Modified	Date Completed	In Folder	Categories
Problem with a fill in form I set up in WORD	Not Started	None	Wed 11/13/2013 1:40 PM	None	Tasks	
Lync Web Scheduler documentation	Not Started	None	Fri 12/21/2012 3:28 PM	None	Tasks	1:1 Deskside/phone/one on one
Lync Web Scheduler documentation	Not Started	None	Fri 12/21/2012 3:15 PM	None	Tasks	1:1 Deskside/phone/one on one
Curriculum for Office 2013 for MAC	Completed	None	Wed 11/13/2013 11:34 AM	Wed 11/13/2013	Tasks	Meaningful Objectives - NASA

Simple List Task View

Subject	Categories	Due Date	Start Date
2014 3 25 Word 2010 for Windows - Table Games	Supporting Projects - NASA	Tue 6/17/2014	Mon 5/5/2014
2014 4 23 Word 2011 for MAC - Table Games	Supporting Projects - NASA	Wed 4/23/2014	Tue 3/11/2014
2014 5 27 Excel 2010 for Windows - Take Charge of Charts	Supporting Projects - NASA	Tue 5/27/2014	Mon 4/7/2014

To-Do List Task View

Subject	Due Date
Categories (none) 5 item(s)	
Categories: Meaningful Objectives - NASA 5 item(s)	
Train Workshops and one on ones	None
FY 2013 Calendar for new curriculum	None
Deskside and one on one application support	None
Curriculum for Office 2010 for Windows	None
2013 7 15 Word 2011 for MAC Basics - Word in Action	Fri 9/30/2014

Prioritized Task View

Subject	Created	Categories
Priority: Low: 3 item(s)		
Priority: Normal: 41 item(s), 4 unread		
Priority: High: 6 item(s)		
Categories: Meaningful Objectives - NASA 5 item(s)		
Curriculum for Office 2010 for Windows	Wed 12/13/2012 3:28 PM	Meaningful Objectives - NASA

Active Task View

Task Subject	Status	Due Date	% Complete	Categories	In Folder
Problem with a fill in form I set up in WORD	Not Started	None	0%	Tasks	
Lync Web Scheduler documentation	Not Started	None	0%	1:1 Deskside/phon...	Tasks
Lync Web Scheduler documentation	Not Started	None	0%	1:1 Deskside/phon...	Tasks
eFits Mid-Month Mini Word Fair: chord, cond	Not Started	None	0%	Tasks	
Curriculum for Office 2010 for Windows	In Progress	None	0%	Meaningful Object...	Tasks

Completed Task View

Task Subject	Due Date	Date Completed	Categories	In Folder
Date Completed: April 18, 2014: 7 item(s), 1 unread				
Lync Web Scheduler documentation	Fri 3/21/2014	Wed 4/16/2014	1:1 Deskside/phone/one on one	Shah
Windows Scheduler	None	Wed 4/16/2014	1:1 Deskside/phone/one on one	Tasks
Participant cheat sheet	Wed 4/16/2014	Wed 4/16/2014	Meaningful Object...	Meaningful Objectives - NASA

Calendar with Daily Task List

Another view that is beneficial is a combination of the **Calendar** with the **Daily Task List** displayed below each day (shown right). With this view enabled, you will have a very good idea of the meetings for the day along with projects to be started or due.

1. Click the **Calendar icon** below the Folder list in the *Navigation*.
2. Click **View Tab | Daily Task List** to display a drop-down menu.
3. From the drop-down list, click to display **Normal**, **Minimized**, or **Off**.
4. Click **Arrange by** to select to display **by Start Date**, **by Due Date**, and/or **Show Completed Tasks**.

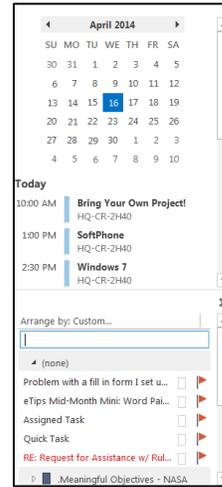
The **Daily Task List** will then display at the bottom of each day in the Calendar.

TUESDAY	WEDNESDAY	THURSDAY
15 Tax Day, United States	16	17
		HRMD All Hands Mic 7 A/B (7H41) Williams, Tiffany N. (HQ-LMD40) MI_C2
	CSPR MIC 3A (3H42-A); O'Connor, Kathleen	
	Bring Your Own Project HQ-CR-2H40 HQ-CAL-CTC	
	SoftPhone; HQ-CR-2H40; HQ-CAL-CT	SoftPhone for Mac; HQ-CR-2H40; HQ
	Windows 7; HQ-CR-2H40; HQ-CAL-C	Word Play; HQ-CR-2H40; HQ-CAL-C1
		2013 8 21 Excel 2011 for MAC ... 2014 8 25 Word 2011 for MAC ... 2013 8 15 PowerPoint 2011 for ... 2013 9 23 Excel 2010 for Windo... 2013 11 25 Excel 2011 for MAC ...

To-Do Bar

- To enable/disable the To-Do Bar, click **View Tab | To-Do Bar**. Select to display **Calendar, People, Tasks** or not display it by selecting **Off**.

Click the X in the upper right to hide the To-Do Bar. Click the horizontal divider and drag up/down to adjust the display area for the Tasks, etc.



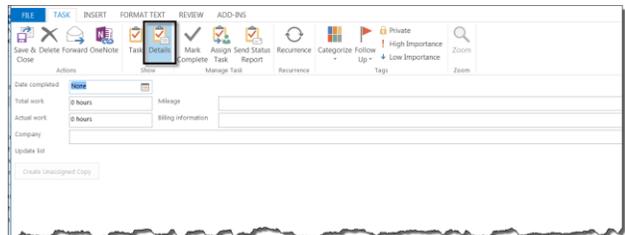
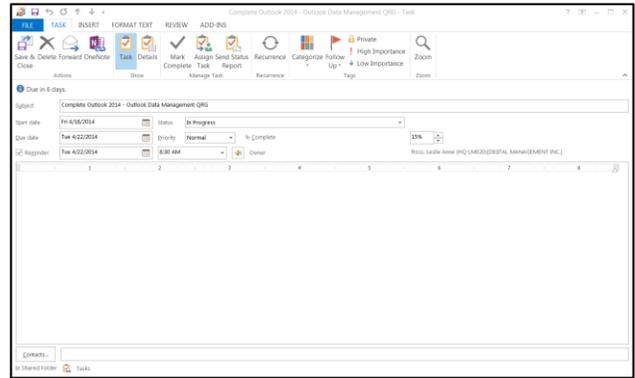
New Tasks

Create a New Task

- Click the **Task icon** below the Folder List in the *Navigation* to display the **Tasks** folder.
- When in the **Tasks**, click **New Task** on the **Home Tab** or use the shortcut keystroke **Ctrl+N** to create a new task. When not displaying the **Tasks**, use the keystroke **Ctrl+Shift+K** to create a new task. The *New Task* dialog box displays (shown lower right)
- Enter a textual description for the task in the **Subject** field.
- Enter a **Start date, Due date, Status, Priority** and **% completed** in the fields provided.
- Enable the **Reminder** checkbox and set the reminder **date and time**.
- Use the features on the **Task command tabs** (discussed in the section entitled *Task Window Command Tabs* at page 4) to insert items, format text, mark private or spellcheck.

Outlook tasks can be used to capture billable information for accounting and timekeeping purposes.

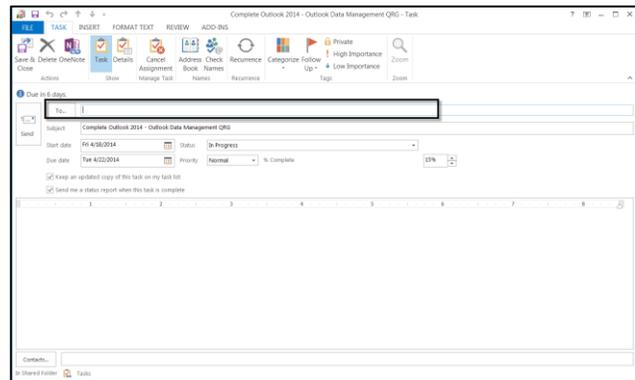
- Click **Details** (shown right) to display the additional fields **Date completed, Total work, Mileage, Actual work, Billing information** and **Company**.
- Click **Save & Close**.



Assign a Task

- Follow steps 1-5 above.
- Click **Assign Task** to delegate the task to another person. A **To** field displays along with two checkboxes with owner monitoring options.
- Click the **To** button to search for and select the task assignee.
- Click the checkbox to enable/disable **Keep an updated copy of this task on my task list**.
- Click the checkbox to enable/disable **Send me a status report when this task is complete**.
- Click **Save & Close**.

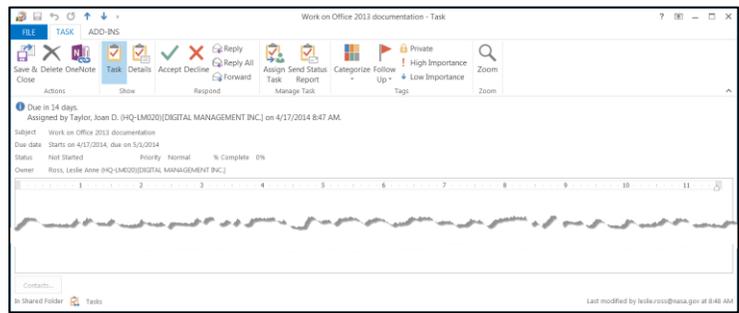
To view tasks you have assigned to others, from the Task folder, click Home Tab | Assigned view.



Respond to Task Request

Task Requests are very similar to Meeting Requests, in that they arrive as an e-mail message and should be responded to via the Task Request window.

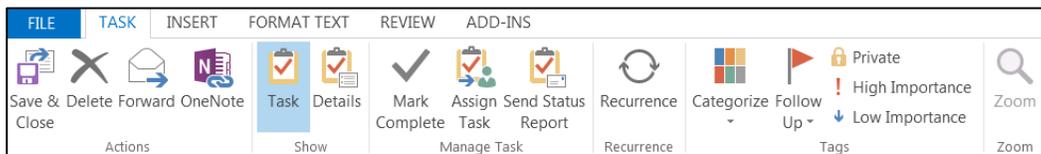
1. Open the **Task Request** message (shown right).
2. Respond via the buttons to **Accept**, **Decline**, **Reply**, **Reply all**, or **Forward** as appropriate.
3. Use the features on the **Task command tabs** (discussed in the section entitled Task Window Command Tabs at page 4) to assign the task, categorize, flag for follow up, or mark private.
4. Click **Assign Task** to delegate the task to someone else.



1. Click **Send Status Report** to forward send a status report to the delegator of the task.
2. Click **Save & Close**.

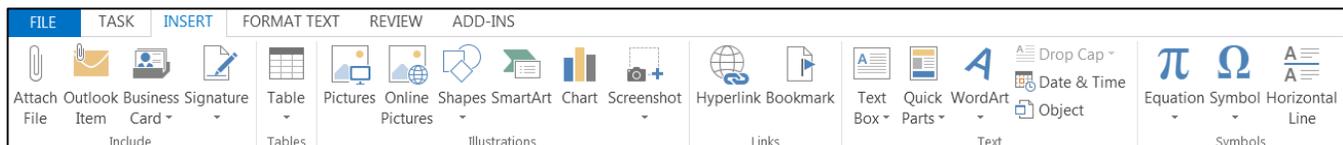
Task Window Command Tabs

Task Command Tab: Actions, Show, Manage Task, Recurrence, Tags and Zoom



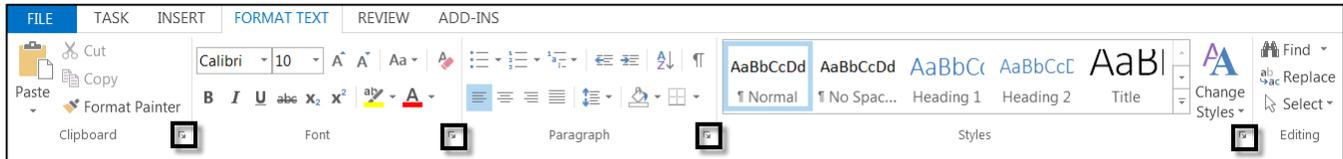
- Click **Forward** to attach the task to an e-mail message.
- Click **Mark Complete** to change the task from active to completed.
- Click **Assign Task** to delegate the task to another party. You can monitor the task through the **Assigned view**.
- Click **Send Status Report** to update the owner of a task assigned to you.
- Click **Recurrence** to create a recurring pattern for the task. See the section entitled Create a Recurring Task at page 5 for more information.
- Click **Follow Up** to flag the task.
- Click **Private** to mark the task private and therefore prohibit even delegates with access to your task from reading the full detail.
- Click **High Importance** or **Low importance** to tag the task appropriately.

Insert Command Tab: Include, Tables, Illustrations, Links, Text and Symbols



- Click **Attach File** to insert a document into the task.
- Click **Outlook Item** to insert any Outlook item (Message, Note, etc.) into the task.
- Click **Business Card** to insert a business card for a contact stored in your Contact list.
- Click **Signature** to display a drop-down list of your stored signatures. Click to select the one to insert. Instructions to create an Outlook Signature are outlined in the Outlook 2013 for Windows QRG 3 – Mail.
- Click **Table** to insert a table with Word 2013 Table functionality. The **Table Tools Design** and **Layout Command Tabs** display.
- Click any of the **Illustrations**, **Links**, **Text** or **Symbol** commands to insert the appropriate item.

Format Text Command Tab: Clipboard, Font, Paragraph, Style and Editing



- Select text to be edited and then click any of the buttons to apply changes:
 - **Cut, Copy, Font, Paragraph** or **Styles**.
 - Click **Paste** to insert cut or copied text.
- Select the text with the desired formatting then click **Format Painter** to copy the format one time from the selected text and paint the same format over newly selected text. Click the **Format Painter** twice to turn on the feature and paint formatting over selected text multiple times. Click **Format Painter** once to turn it off.
- Click the **Clipboard, Font, Paragraph** or **Style dialog box launchers** to display the full dialog boxes for each set of commands.

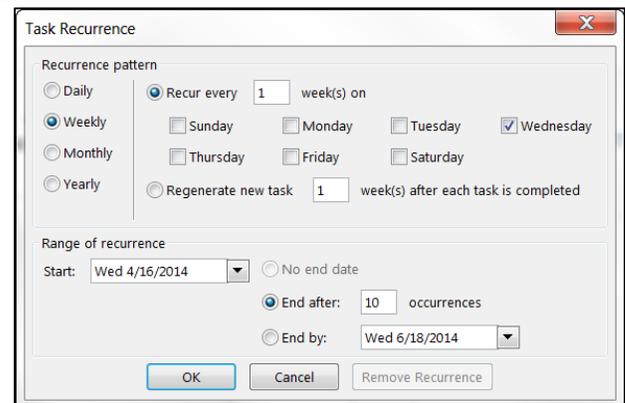
Review Command Tab: Proofing and Language



- Click **Spelling & Grammar** to check the spelling or grammar of the Task.
- Click **Research** to display the *Research Task Pane* with fields to search reference materials and online.
- Select text and click **Thesaurus** to find a synonym of the selected word.

Create a Recurring Task

1. In the Task window, click **Task Tab | Recurrence**. The *Task Recurrence* dialog box displays (shown right).
2. Establish the recurring pattern by select either **Daily, Weekly, Monthly** or **Yearly**.
3. Enter the number of recurrences in the **Recur every [] weeks / months / or years** field (field changes based on recurring pattern selection).
4. Select the **days of the week** on which the task should be completed.
5. In the **Range of Recurrence** section, select the **Start Date**.
6. Select the range of recurrences to **End after [] occurrences** or to **End by** a specified date.



*Never select **No end date** as the recurrence will continue forward in time without end. Rather, end recurring items at the end of the current year and create a new recurring item for the next year. Recurring tasks that carry over through several years can become corrupt over time and causes performance issues in Outlook.*

Also, do not include attachments in recurring items. Attachments will be included in every instance of the recurring item which will use valuable server space toward your Outlook mailbox maximum quota size.

7. Click **OK** when complete.

Task Options

Click **File Tab | Options | Tasks** to display the Task options and change how you work with your tasks.

Task Options

- Click the checkbox to enable/disable the option **Set reminders on tasks with due dates**.
- Click the **drop-down arrow** for **Default reminder time** and select the time to be reminded on tasks with due dates.
- Click the checkbox to enable/disable the option **Keep my task list updated with copies of tasks I assign to other people**.
- Click the checkbox to enable/disable the option to automatically **Send status report when I complete an assigned task**.
- Click the **drop-down arrow** for **Overdue task color** and select from the options provided.
- Click the **drop-down arrow** for **Completed task color** and select from the options provided.
- Click **Quick Click** to set the default behavior when single-clicking on the Flags column in the **Mail** folder. The *Set Quick Click* dialog box displays. Click the **drop-down arrow** and select the single-click Flag default.

Tasks Options: Work Hours

- Click the **drop-down arrow** for the **Task working hours per day** to select the number of hours you work each day.
- Click the **drop-down arrow** for the **Task working hours per week** to select the number of hours you work each week.

Task Shortcut Keystrokes

<i>To do this</i>	<i>Press</i>	<i>To do this</i>	<i>Press</i>
Show or hide the To-Do Bar .	ALT+F2	Select all items.	CTRL+A
Accept a task request.	ALT+C	Delete selected item.	CTRL+D
Decline a task request.	ALT+D	Forward a task as an attachment.	CTRL+F
Find a task or other item.	CTRL+E	Create a task request.	CTRL+SHIFT+ALT+U
Open the Go to Folder dialog box.	CTRL+Y	Switch between the Navigation Pane , TAB or SHIFT+TAB Tasks list, and To-Do Bar .	
Create a task (when in Tasks).	CTRL+N	Open selected item as a Journal item.	CTRL+J
Create a task (from any Outlook view).	CTRL+SHIFT+K	Undo last action.	CTRL+Z
Open selected item.	CTRL+O	Flag an item or mark complete.	INSERT
Print selected item.	CTRL+P		