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 icon](image) 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.
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.
To-Do Bar
1. 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
1. Click the Task icon below the Folder List in the Navigation to display the Tasks folder.
2. 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).
3. Enter a textual description for the task in the Subject field.
4. Enter a Start date, Due date, Status, Priority and % completed in the fields provided.
5. Enable the Reminder checkbox and set the reminder date and time.
6. 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.

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

Assign a Task
1. Follow steps 1-5 above.
2. Click Assign Task to delegate the task to another person. A To field displays along with two checkboxes with owner monitoring options.
3. Click the To button to search for and select the task assignee.
4. Click the checkbox to enable/disable Keep an updated copy of this task on my task list.
5. Click the checkbox to enable/disable Send me a status report when this task is complete.
6. 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

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