

# Microsoft Outlook 2010 – Level 1

10 – Tasks



# TASKS

## InFocus

Most people, from time to time, work with (or at least attempt to work with) to-do lists. To-do lists are simply lists of things or tasks that you have to do – prepare a sales presentation, write a letter, compile a report, buy the milk, put out the cat, and so on.

Outlook provides an electronic to-do list known as **Tasks**. Here you can enter the various things you have to do, nominate an optional completion date or time, and even track progress as you work through the task.

### In this booklet you will:

- ✓ learn how to view tasks
- ✓ learn how to create simple tasks in the **Task** window
- ✓ learn how to type tasks directly into the **Tasks** pane
- ✓ learn how to display tasks in different views
- ✓ learn how to sort tasks
- ✓ learn how mark tasks as being complete
- ✓ learn how to delete tasks
- ✓ learn how to print a task list

# VIEWING TASKS

Tasks are displayed in three locations in Outlook 2010 – the **To-Do Bar**, **Tasks** and the **Daily Task List** in the Calendar. Using any of these locations, you can quickly and easily see what tasks are

current or pending and check their status. You can also easily manage your tasks, updating them and marking them as completed when appropriate.


## Try This Yourself:


Open File

Before starting this exercise you **MUST** open the file *Watsonia\_15.pst...*


- 1 Click on **[Tasks]** in the **Navigation** pane to open the **Tasks** pane


The **To-Do List** and the **minimised To-Do Bar** appear by default. Let's look at the **To-Do Bar**...

- 2 Click on **Expand the To-Do Bar**  to see the expanded **To-Do Bar**

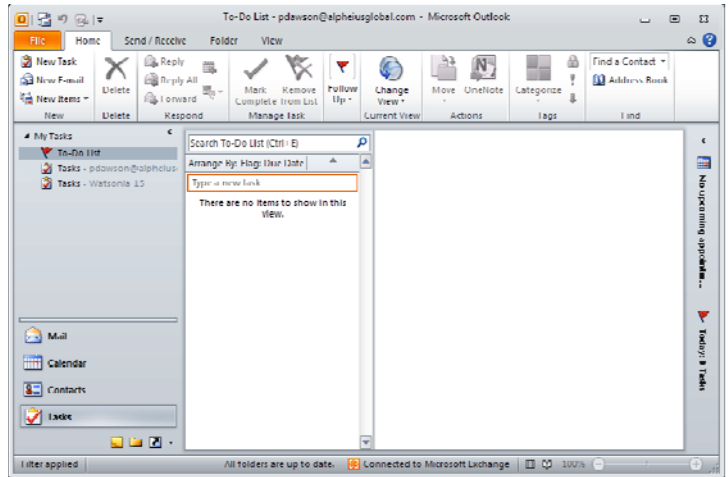
- 3 Click on **Minimise the To-Do Bar**  to minimise it again

You can also view tasks in the **Calendar**...

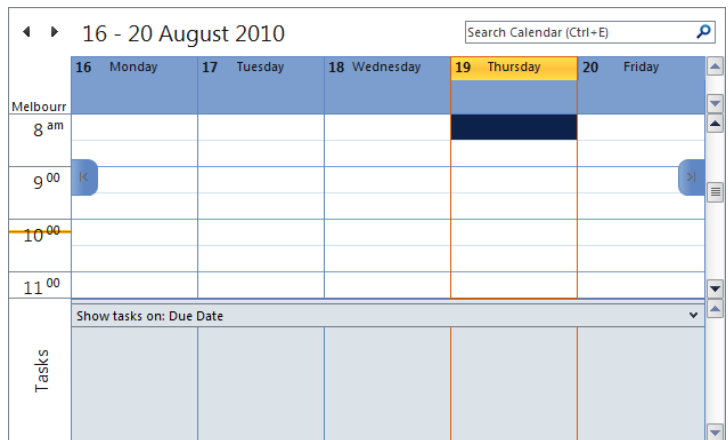
- 4 Click on **[Calendar]** in the **Navigation** pane, then click on **Work Week**  to see the **Daily Task List** across the bottom of the screen

If the **Tasks** list is not visible, click on **Daily Task List**  and select **Normal** on the **View** tab...

- 5 Click on **[Tasks]** in the **Navigation** pane to return to **Tasks** again





1



4

## For Your Reference...

To **view tasks**:

1. Click on the **View** tab
  2. Click on **To-Do Bar**  > **Normal**
- or
1. Click on **[Calendar]**
  2. Click on **Daily Task List**  > **Normal**

## Handy to Know...

- You can access **Tasks** from any area in Outlook by pressing **Ctrl** + **4**.
- If the **To-Do Bar** is minimised, you can temporarily display tasks by clicking on the appointments or tasks headings in the minimised **To-Do Bar**. Click outside the **To-Do Bar** to minimise it again.

# CREATING SIMPLE TASKS

Tasks in Outlook can be quite simple, in fact all you really need to enter is the task itself – for example, pick up milk, prepare sales report, write letter, and so on. But, a

little more information such as the due date and maybe even a priority rating will make it easier later to sort and work with tasks.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_15.pst...*

**1** Click on **Tasks – Watsonia\_15** under **My Tasks**

*Simple List* is the default view. This view shows the completion status, Subject, Due Date, Categories and flag status...

**2** Click on **New Task** in the **New** group to open a new **Task** window

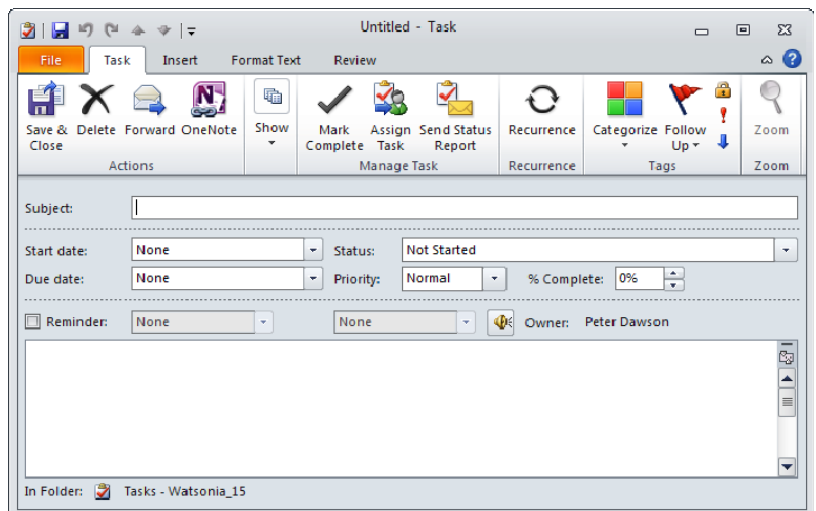
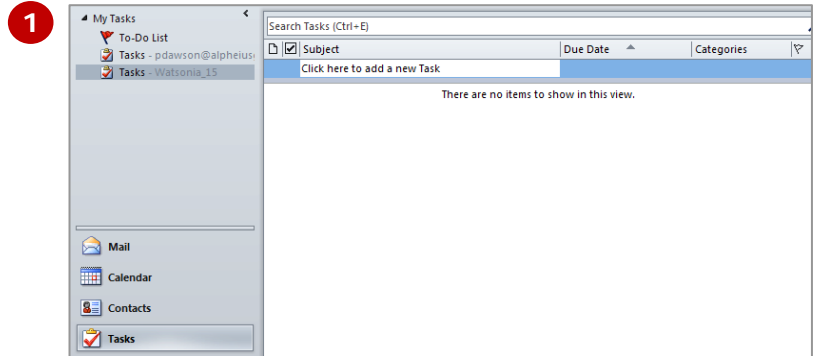
**3** Type **Collect data for Reserve proposal** in **Subject**

**4** Click on the drop arrow for **Due date** and select next **Monday**

**5** Click on the drop arrow for **Priority** and select **High**

**6** Click on **Save & Close** to create the new task

**7** Repeat steps **2** to **6** to create three additional tasks as shown



**2**

**7**

Subject	Due date	Priority
Speak to Fred about holidays	None	Low
Hire overhead projector	Next Monday	Normal
Pick up groceries	Today	Normal

## For Your Reference...

To **create** a **simple task**:

1. Click on **New Task** in the **New** group
2. Enter the relevant details
3. Click on **Save & Close**

## Handy to Know...

- You can create a task from any Outlook item including emails. To do this, drag the item to the task list section of the **To-Do Bar**. When you see a red line with arrows at each end positioned where you want to put the task, release the mouse button. You can also drag them onto **[Tasks]** on the Navigation pane.

# TYPING TASKS DIRECTLY


If your tasks are relatively simple, or you just can't be bothered using a formal **Task** window to enter task details, then you can enter the tasks directly into the Tasks pane. The phrase **Click here to add a**

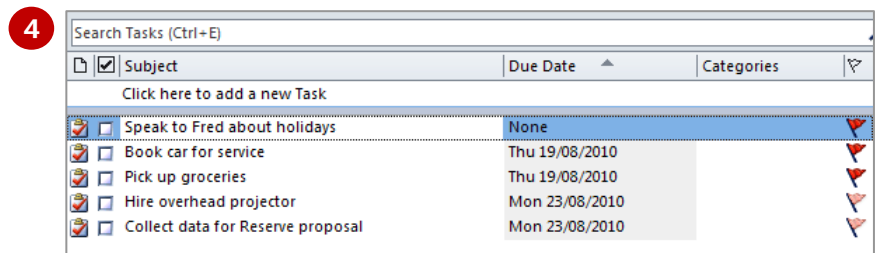
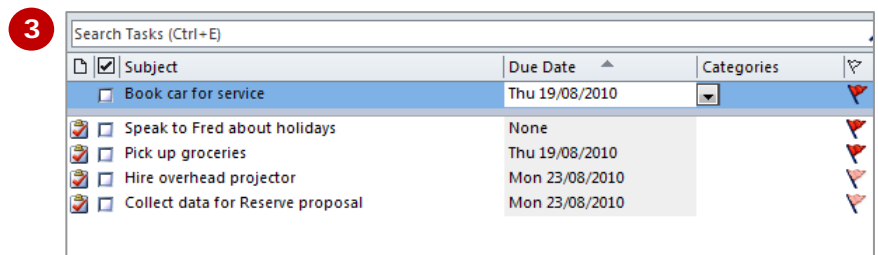
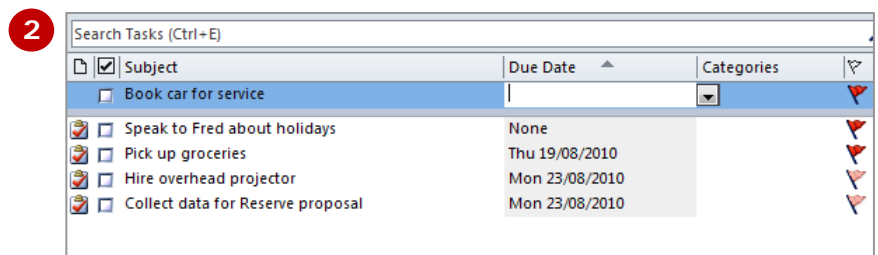
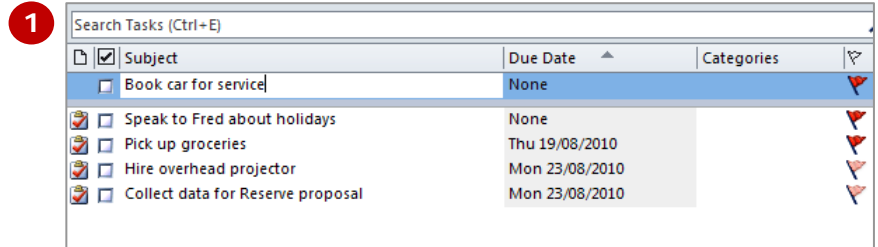
**new Task** is actually a live hot spot. When you click on it, it changes to a data entry field and you can begin to enter the details for your task.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_15.pst...*

- 1 Click on **Click here to add a new Task** under **Subject** and type **Book car for service**
- 2 Click on **None** under **Due Date** to display a drop arrow
- 3 Click on the drop arrow  for **Due Date** and click on **[Today]**
- 4 Click on another task to complete the data entry




## For Your Reference...

To **type tasks** directly into the **Tasks** pane:

1. Click on **Click here to add a new Task**
2. Type the **Subject** and other fields as desired
3. Click on another task to complete the data entry

## Handy to Know...

- If you change the current view to **Detailed**, you'll see more fields in which you can input task information. To do this, click on the **View** tab, click on **Change View**  and click on **Detailed**.

# CHANGING TASK VIEWS


If you have been using a default installation of Outlook, the tasks that you have inserted into the Task pane have been displayed in a **Simple List** view.

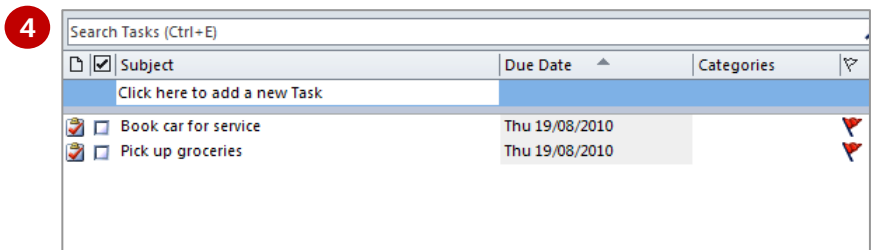
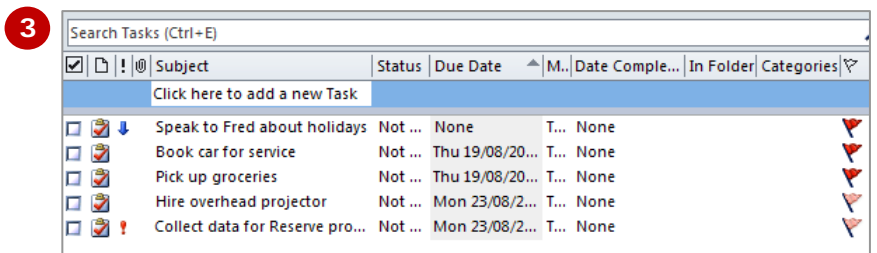
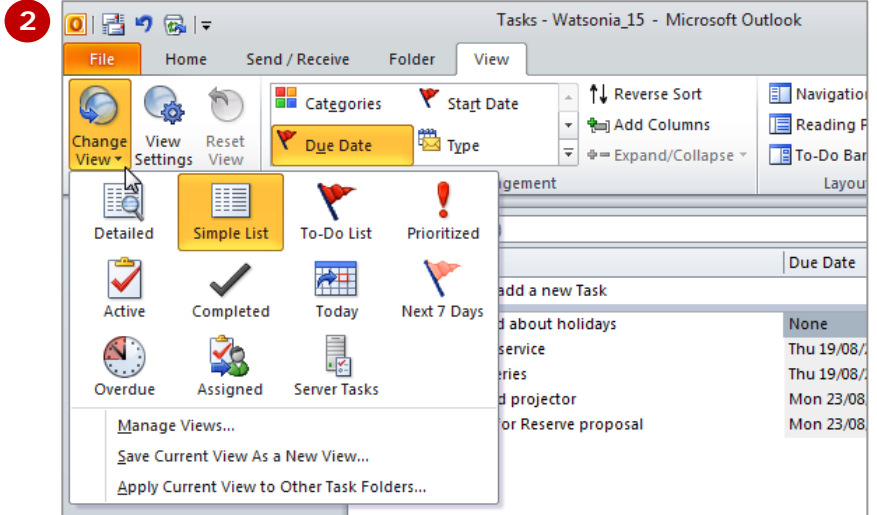
There are actually various other views that you can use to display the task list on the screen. These views can be accessed via the **View** tab on the ribbon.

## Try This Yourself:

Same File


Continue using the previous file with this exercise, or open the file *Watsonia\_15.pst...*

- 1 Click on the **View** tab to see the available options
- 2 Click on **Change View**  in the **Current View** group to open a gallery
- 3 Click on **Detailed** to see more information about the tasks
- 4 Click on the other views and spend a few moments studying them  
*Our example shows the Today view...*
- 5 Change the current view to **Simple List** to return it to the default view





## For Your Reference...

To **change task views**:

1. Click on the **View** tab
2. Click on **Change View**  in the **Current View** group
3. Select the desired option

## Handy to Know...

- You can create your own custom views by clicking on **Change View** , selecting **Manage Views** to open the **Manage All Views** dialog box and clicking on **[New]**.
- You can **filter** the data that appears in the list by clicking on **View Settings**  in the **Current View** group and clicking on **[Filter]**.

# SORTING TASKS

Tasks are displayed in lists on the screen. All of these lists contain headings that appear in the grey bar at the top of the list. These headings are actually buttons and when clicked they will control how the

list will be sorted. For example, if you click on **Due Date** the list will be sorted by this column in ascending order. Clicking on it again will sort the list in descending order.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_15.pst...*

- 1 Change the current view to **Detailed**
- 2 Click on the **Subject** heading to display the tasks in alphabetical order, from A to Z
- 3 Click on the **Due Date** heading to display the tasks in due date order
- 4 Click on the **Priority** heading (this is the heading shown to the left of the list by ! ) to display the tasks in priority order (high, normal, low)
- 5 Change the current view to **Simple List**

The screenshots show the 'Search Tasks (Ctrl+E)' window with the following task lists:

**Screenshot 1: Default View**

Subject	Status	Due Date	M..	Date Comple...	In Folder	Categories
Speak to Fred about holidays	Not ...	None	T...	None		
Book car for service	Not ...	Thu 19/08/20...	T...	None		
Pick up groceries	Not ...	Thu 19/08/20...	T...	None		
Hire overhead projector	Not ...	Mon 23/08/2...	T...	None		
Collect data for Reserve pro...	Not ...	Mon 23/08/2...	T...	None		

**Screenshot 2: Sorted by Subject (A-Z)**

Subject	Status	Due Date	M..	Date Comple...	In Folder	Categories
Book car for service	Not ...	Thu 19/08/20...	T...	None		
Collect data for Reserve pro...	Not ...	Mon 23/08/2...	T...	None		
Hire overhead projector	Not ...	Mon 23/08/2...	T...	None		
Pick up groceries	Not ...	Thu 19/08/20...	T...	None		
Speak to Fred about holidays	Not ...	None	T...	None		

**Screenshot 3: Sorted by Due Date (Ascending)**

Subject	Status	Due Date	M..	Date Comple...	In Folder	Categories
Book car for service	Not ...	Thu 19/08/20...	T...	None		
Pick up groceries	Not ...	Thu 19/08/20...	T...	None		
Speak to Fred about holidays	Not ...	None	T...	None		
Hire overhead projector	Not ...	Mon 23/08/2...	T...	None		
Collect data for Reserve pro...	Not ...	Mon 23/08/2...	T...	None		

**Screenshot 4: Sorted by Priority**



Subject	Status	Due Date	M..	Date Comple...	In Folder	Categories
Collect data for Reserve pro...	Not ...	Mon 23/08/2...	T...	None		
Book car for service	Not ...	Thu 19/08/20...	T...	None		
Pick up groceries	Not ...	Thu 19/08/20...	T...	None		
Hire overhead projector	Not ...	Mon 23/08/2...	T...	None		
Speak to Fred about holidays	Not ...	None	T...	None		

## For Your Reference...

To **sort** a **task list**:

1. Click on the heading in the Task list to sort in ascending order
2. Click on the heading again to sort in descending order

## Handy to Know...

- If you categorise tasks, you can sort them by categories. To assign a category to a task, double-click on the task to open it, click on **Categorise**  in the **Tags** group, select the desired category, then click on **Save & Close** .



# COMPLETING TASKS

Tasks are normally required to be completed – hopefully by the due date. In Outlook you can mark a task as completed by clicking in the white tick box to the left of the task in the listing. A completed task

appears crossed out. You can also enter a percentage completion amount in the **Task** window – this allows you to track the progress of longer and more complex tasks.

## Try This Yourself:

Same File


Continue using the previous file with this exercise, or open the file *Watsonia\_15.pst...*

1 Click in the white box to the left of **Pick up groceries** to mark it as completed

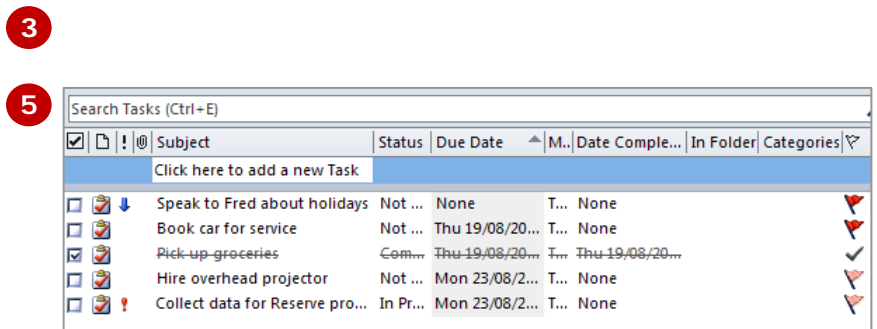
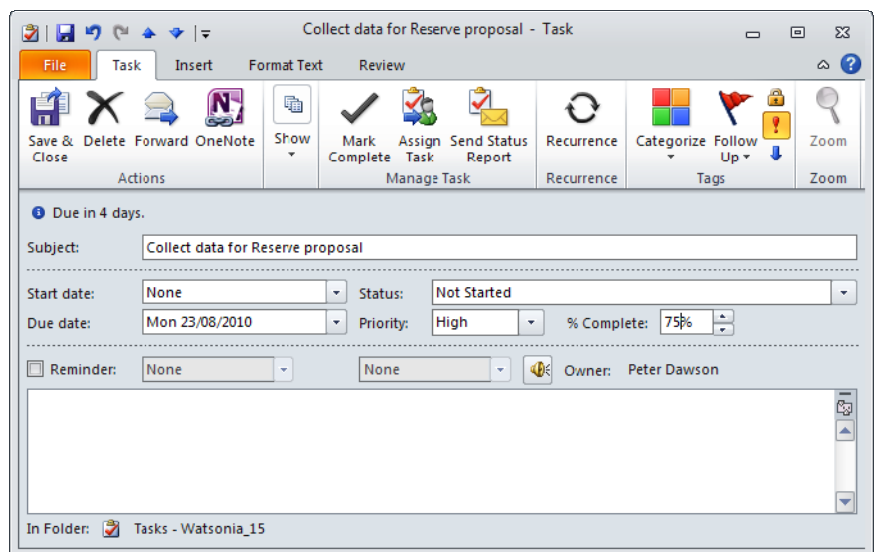
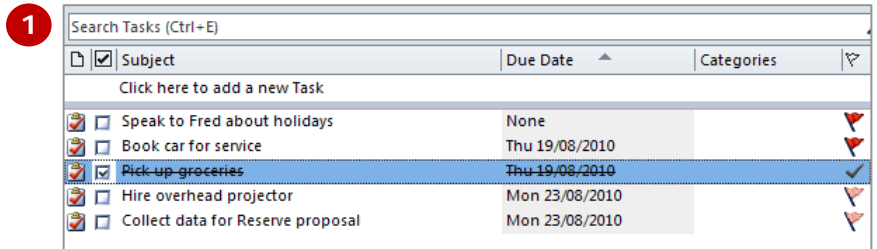
The task will appear with a line through its text...

2 Double-click on **Collect data for Reserve proposal** to display it in a **Task** window

3 Double-click on **0%** in **% Complete** and type **75%**

4 Click on **Save & Close**  to save and close the task

5 Change the current view to **Simple List** to return to the default view



## For Your Reference...

To **mark a task as completed**:

1. Click in the tick box to the left of the task in the Task pane or  
Double-click on the task and type a percentage in **% Complete**

## Handy to Know...

- Don't become a slave to your task listing and feel that every task needs to be tracked to the n<sup>th</sup> degree. Only use the percentage completed option for longer and more complex tasks that are really important!



## DELETING TASKS


Tasks are not automatically deleted from the listing when they are marked as completed – hey, it makes you feel good to have a listing of completed tasks!

To remove a task from the list, irrespective of whether it is completed or not, you will have to delete it. You can do this by pressing **Del** or using the ribbon or context menu.

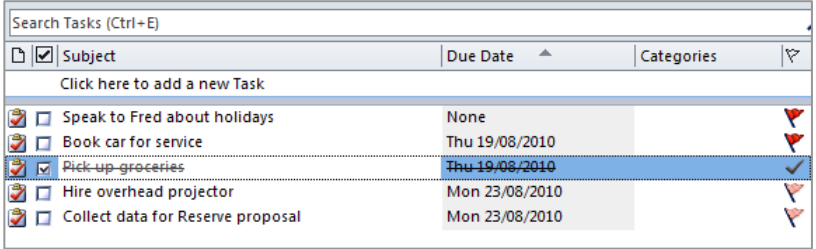
### Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_15.pst...*

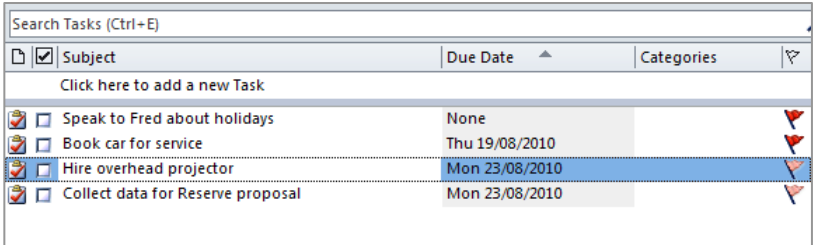
- 1 Click on the completed **Pick up groceries** task to select it
- 2 Click on the **Home** tab and click on **Delete**  to delete the task

**1**



Subject	Due Date	Categories
Click here to add a new Task		
<input type="checkbox"/> Speak to Fred about holidays	None	
<input type="checkbox"/> Book car for service	Thu 19/08/2010	
<input checked="" type="checkbox"/> Pick up groceries	Thu 19/08/2010	
<input type="checkbox"/> Hire overhead projector	Mon 23/08/2010	
<input type="checkbox"/> Collect data for Reserve proposal	Mon 23/08/2010	


**2**



Subject	Due Date	Categories
Click here to add a new Task		
<input type="checkbox"/> Speak to Fred about holidays	None	
<input type="checkbox"/> Book car for service	Thu 19/08/2010	
<input checked="" type="checkbox"/> Hire overhead projector	Mon 23/08/2010	
<input type="checkbox"/> Collect data for Reserve proposal	Mon 23/08/2010	

### For Your Reference...

To **delete** a **task**:

1. Click on the task to select it
2. Click on **Delete**  on the **Home** tab or  
Press **Del**

### Handy to Know...

- As with all items in Outlook when they are deleted they are moved to the **Deleted Items** folder. They can, of course, be recovered from here. If you wish to delete the item permanently, press **Shift** + **Del**.
- You can also delete a task by right-clicking on it and selecting **Delete**.

# PRINTING A TASK LIST

Tasks appear in a list in the Task screen. This list can be printed using the printing options found in **Backstage view**. Since Outlook will print whatever is currently displayed on the screen and in the layout

in which it appears, you can produce a variety of different Task reports simply by choosing a specific sort order, view or filter and performing a print operation.

## Try This Yourself:

Same  
File

Continue using the previous file with this exercise, or open the file *Watsonia\_15.pst...*

1

Change the current view to **Detailed** to see more information

*This additional information will be printed...*

2

Click on the **File** tab, then click on **[Print]**

*Notice that a preview of the list appears to the right of the window...*

3

Click on **[Print]** to print the list

2

<input type="checkbox"/>	<input type="checkbox"/>	Subject	Status	Due Date	M.	Date Complet...	In Folder	Categories
<input type="checkbox"/>	<input type="checkbox"/>	Speak to Fred about holidays	Not Star...	None	Th..	None		
<input type="checkbox"/>	<input type="checkbox"/>	Book car for service	Not Star...	Thu 19/08/2010	Th..	None		
<input type="checkbox"/>	<input type="checkbox"/>	Hire overhead projector	Not Star...	Mon 23/08/2010	Th..	None		
<input type="checkbox"/>	<input type="checkbox"/>	Collect data for Reserve proposal	In Progr...	Mon 23/08/2010	Th..	None		

Peter Davison 1 19/08/2010 12:32 PM

## For Your Reference...

To **print** a **task list**:

1. Display the list in the desired view
2. Sort the data if required
3. Click on the **File** tab, then click on **[Print]**
4. Click on **[Print]**

## Handy to Know...

- If you wish to print just the details for one task, open the task in a **Task** window and use the print options there.
- If you want to print specific tasks, press **Ctrl** and click on the desired tasks, then click on **[Print Options]** under **Printer** and select the pages under **Print range**.

# CONCLUDING REMARKS

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## Congratulations!

You have now completed the **Tasks** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

## Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.
- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet
- read computer magazines - there are often useful articles about specific techniques
- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt
- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others
- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way
- and of course, there are also more courses and booklets for you to work through
- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**