CHAPTER 11   **INFOCUS**

TASK REQUESTS

At its simplest level you can use Outlook *Tasks* as a basic to-do manager. But, *Tasks* can be used for more complex activities including managing tasks for others to perform.

For example, if you are managing a project, you can assign tasks to team members and have Outlook *Tasks* set up in such a way that these people will advise you when the task is updated or completed.

When you assign a task to someone in the workgroup or your contacts list, you are assigning them a *task request*. Just like the scheduling tool in Outlook, the assigning task request feature uses the email component of Outlook to communicate with the people to whom you assign tasks.

In this session you will:

- ✓ gain an understanding of how task requests work
- ✓ learn how to create a task request
- ✓ learn how to respond to a task request
- ✓ learn how to complete a task that has been assigned to you
- ✓ learn how to view updated task requests.

HOW TASK REQUESTS WORK

A *task request* is a task assigned by one person in a workgroup to another. In Outlook the task *initiator* gives the responsibility for completing the task to another person (task *owner*). Outlook uses both the *Task* and *Mail* facilities to control the process and the tracking of the task, and sets up a communication link between the two parties − initiator and owner.

The Task Request Process

Step 1 − Initial Request

The *initiator* creates a task request and then assigns that task to another person. The initiator can choose whether or not to maintain an updated copy of the task in their Tasks list using the two checkboxes at the bottom of the task request header. The task request is then sent via an email message with voting buttons (Accept, Reject).

Step 2 − Request Acceptance

The recipient receives the task request in an email message with voting buttons.

When the recipient accepts the task (they then become the task *owner*), details are copied from the initiator's computer to the owner's computer. The task appears in the owner's Tasks list as though they had created it themselves.

An acceptance message is sent to the initiator and the initiator's Tasks list is updated to reflect the fact that the owner has accepted the task.

Step 3 −Task Updates (Optional)

If the initiator ticked the two checkboxes at step *1*, they will receive an update message whenever the owner updates a task (e.g. enters a *% Complete* value). In actual fact the message carries a copy of the task (with the latest changes) and copies it to the initiator's computer thereby updating the initiator's version of the task.

Step 4 − Task Completion

When the owner has completed the task a message is sent to the initiator. It provides the initiator with a final status report on the task, which includes information such as start and end dates, duration in hours, and the like.
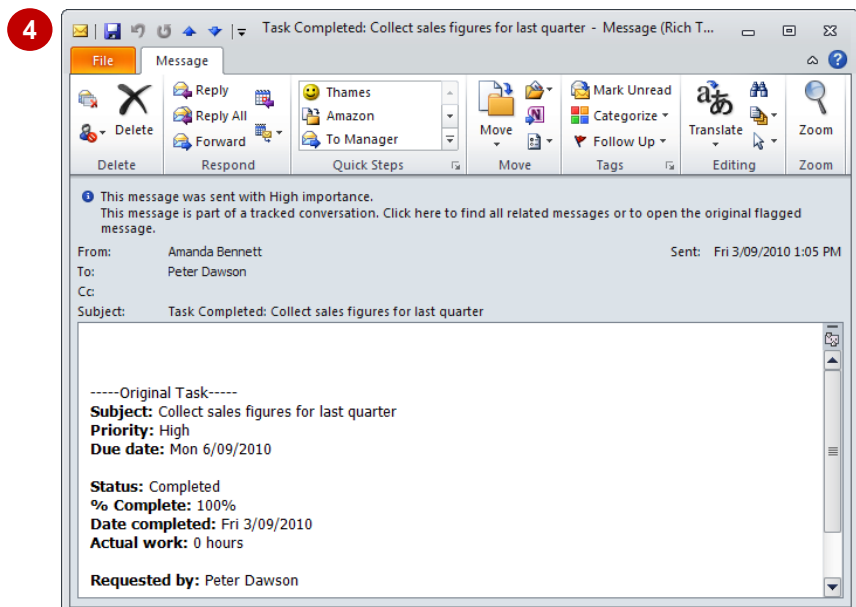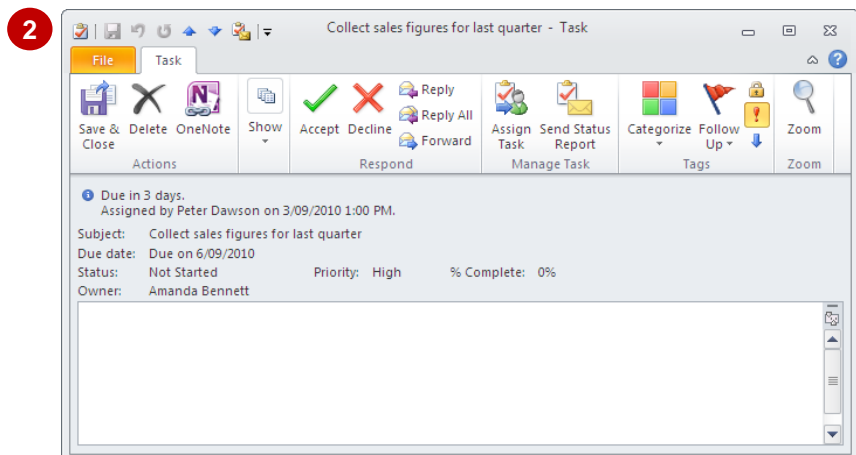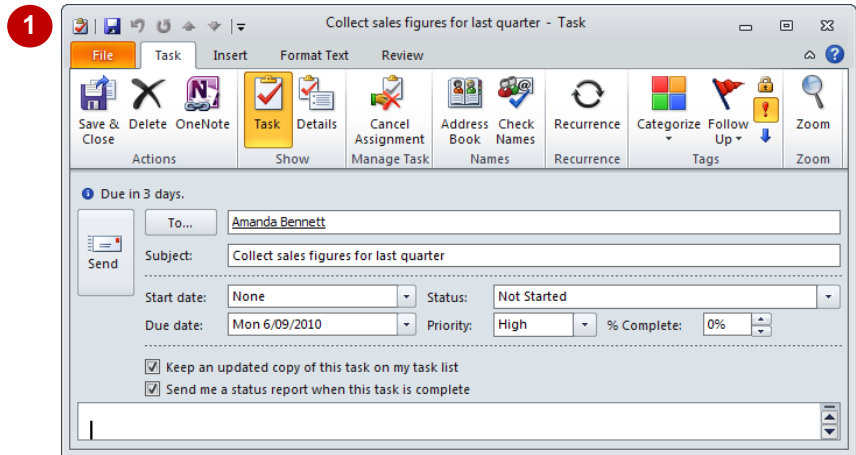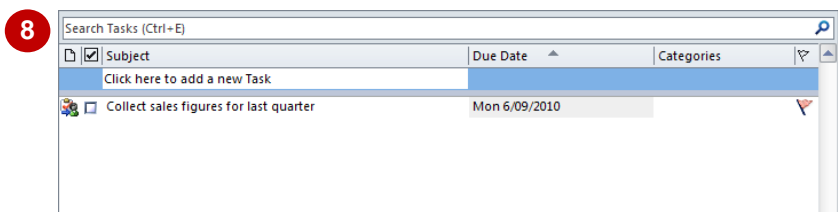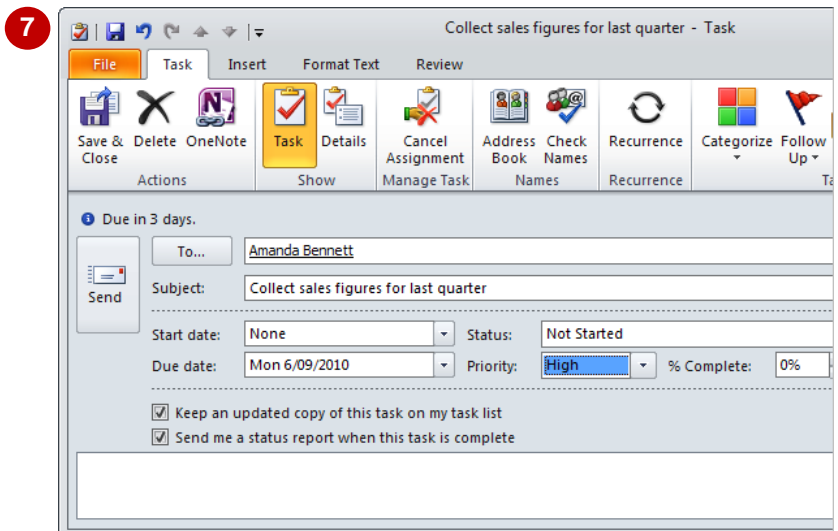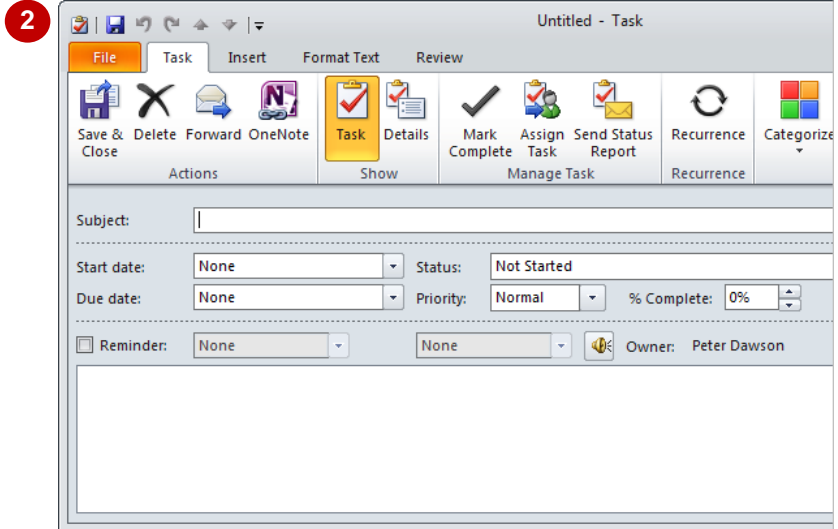
CREATING A TASK REQUEST

A **Task request** is like a normal task except that responsibility for completing it is given to someone else. A task request is created and then transmitted as an email message with voting buttons. It ultimately ends up as a task in the recipient's own Tasks list. The requested task also appears in your Tasks list with the other member's name as the **owner** of the task.

Try This Yourself:

Before starting this exercise ensure that Outlook has started…

1 Click on **[Tasks]** in the Navigation pane, then click on **Tasks** under **My Tasks** to display the **Tasks** list

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

3 Click on **Assign Task** 📇 in the **Manage Task** group to create a task request

4 Click on **[To]** to open the **Select Task Recipient** dialog box, then double-click on a recipient and click on **[OK]**

5 Type **Collect sales figures for last quarter** in **Subject**

6 Click on the drop arrow for **Due date** and select the next working day

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

8 Send the message

The task will be added to the Tasks list

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For Your Reference…

To **create** a **task request**:

1. Click on **New Task** 📝
2. Click on **Assign Task** 📇 in the **Manage Task** group
3. Enter the desired task and recipient details
4. Send the message

Handy to Know…

- You can create a new task from an email message. To do this, drag it from the **Inbox** to **[Tasks]** in the Navigation pane. A **Task** window will open containing the details from the message. Alternatively, you can drag a message to the task list section at the bottom of the **To-Do bar** in the Mail pane.

RESPONDING TO A TASK REQUEST

When someone sends you a task request, you'll receive it in the form of an email message with voting buttons. These buttons allow you to either accept or reject the task. If you accept it, a new task will be created in your Tasks list and the details from the task request will be entered into it. A return notification will be sent to the initiator advising them that you have accepted the task.

Try This Yourself:

Before starting this exercise ensure that a colleague has sent you a new task request…

1   Click on **[Mail]** in the Navigation pane, then click on *Inbox*

2   Double-click on the *Task Request* message to open it in a *Task* window

3   Click on *Accept* ✓▾ in the *Respond* group

Outlook will display a message asking whether or not you want to edit the response before replying to the initiator…

4   Ensure that **Send the response now** is selected, then click on **[OK]**

5   Click on **[Tasks]** in the Navigation pane, then click on *Tasks* to display the *Tasks* list

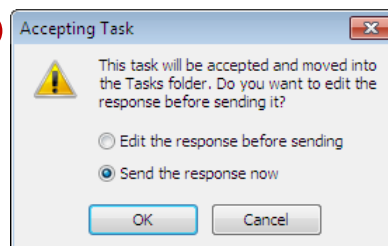*The icon for the accepted task will now appear like a normal task but with a red flag*
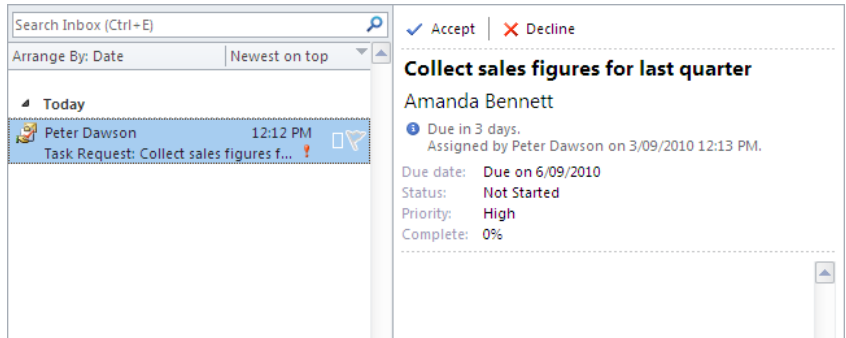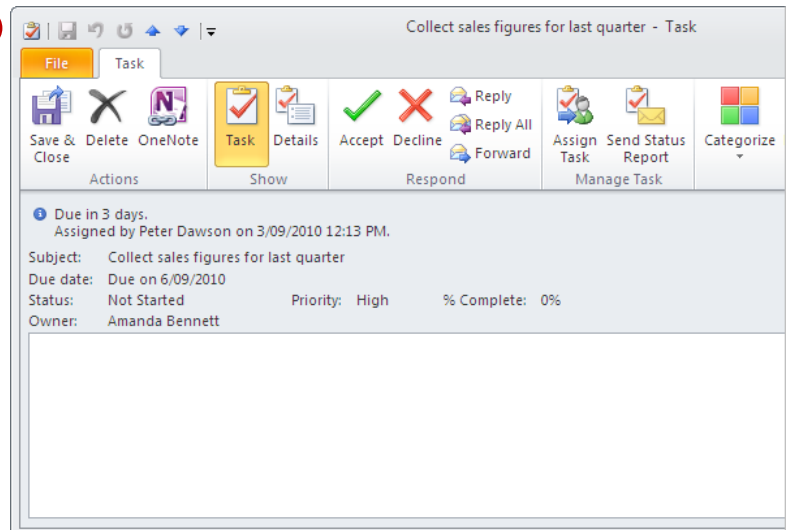
For Your Reference…

To *accept* a *task request*:

1. Double-click on the *Task Request* message in your Inbox
2. Click on *Accept* ✓▾ in the *Respond* group
3. Click on **[OK]**

Handy to Know…

- If you choose to decline a task request by clicking on *Decline* ✕ in the *Respond* group, the initiator will receive a message saying that you have rejected the task. The initiator can then reclaim the task (so that they can reassign it) by opening the message and selecting *Return to Task List*.

COMPLETING AN ASSIGNED TASK

Task requests are progressed and completed in exactly the same way as normal requests. You can update the details as you work or leave it until everything is done and then mark it as

completed. When you update or complete a task request, an updated task mail message will be sent to the initiator unless they specified that they didn't want to be notified when they assigned the task.

Try This Yourself:

*Before starting this exercise ensure that a colleague has sent you a task request and that you have previously accepted it…*

1   In the *Tasks* list double-click on the task to which you have been assigned and have accepted

Tasks that you have accepted will appear in the Tasks list with an icon with a red tick and two hands 🖐…

2   Click on *Mark Complete* ✅ in the *Manage Task* group

The % Complete value will change to 100% and then the Task window will close. The task will now appear in the Tasks list with a grey line through its text and with a tick in the Complete checkbox

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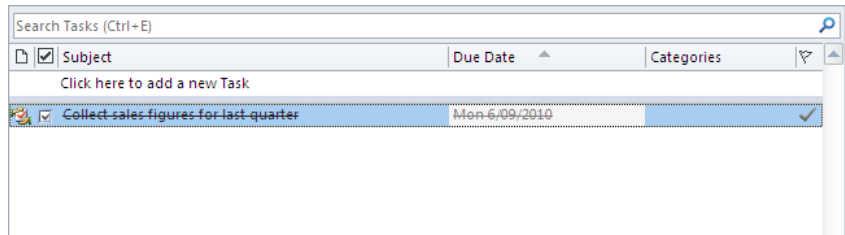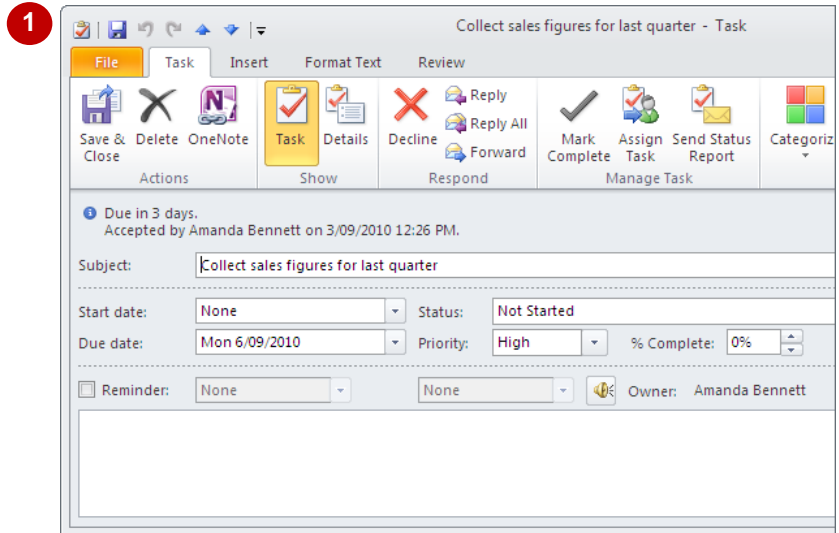
For Your Reference…

To *complete* a *task request*:

1. Click in the white checkbox to the left of the task request in the *Tasks* list
   or
   Click on the task in the *Tasks* list and click on *Mark Complete* ✅

Handy to Know…

- Whenever you change a task an update message may be sent to the initiator − so ensure you don't change a task too often!
- If you partially complete a task you can show this by typing the apt figure in *% Complete*. You can click on *Send Status Report* 🖼 to send a report to the task initiator.
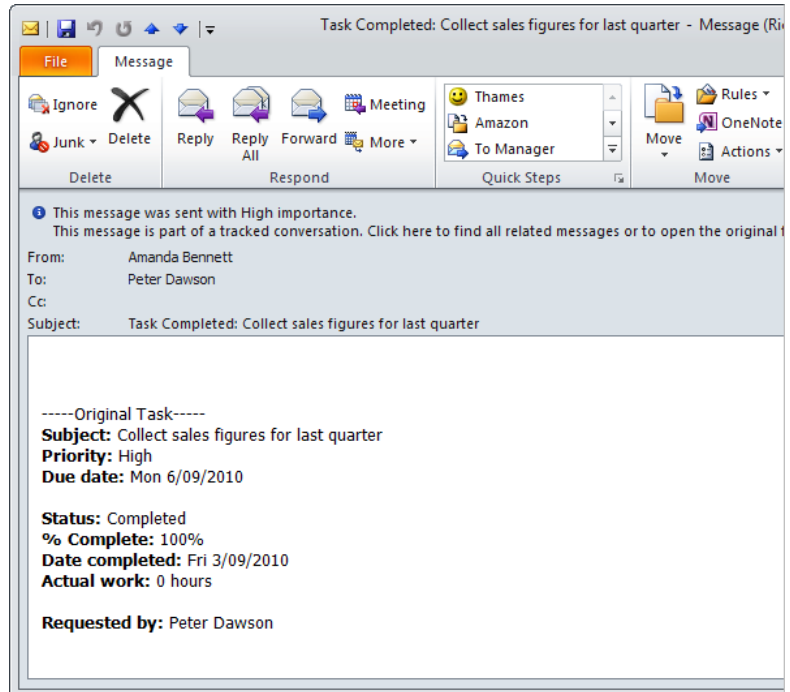
VIEWING UPDATED TASK REQUESTS

As the owners of the task requests update their tasks, including marking a task as completed, you will be sent an update message by default. The update message simply contains a status report for the updated task. When you receive a status report, your copy of the task in your *Tasks* list will be updated to reflect the change made by the owner.


Try This Yourself:

Ensure you have a task request that has been accepted and completed by another person…

1. Click on **[Mail]** in the Navigation pane, then click on *Inbox*

   Two messages should appear at the top of the list – a Task Accepted and a Task Completed message...

2. Double-click on the *Task Completed* message to see the status report for the task in the body of the message

3. Click on the orange InfoBar at the top of the message to display a shortcut menu

4. Select **Open Original Flagged Message** to open the updated task

5. Close the task window, then close the message
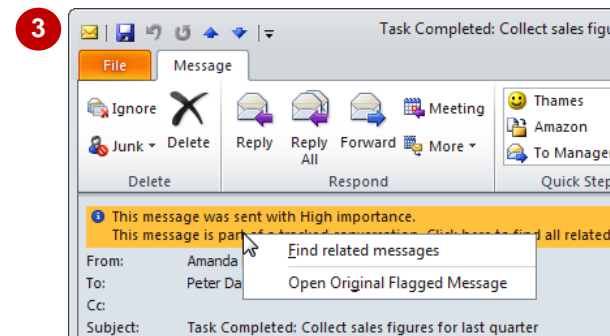
For Your Reference…

To **view** an **updated task request**:

1. Double-click on the **Task Completed** email message in your **Inbox** to view the status report
2. Click on the InfoBar and select **Open Original Flagged Message** to view the updated task

Handy to Know…

- A **Task Completed** email message is only sent when the task is completed by the owner. A message with the task details, however, is sent every time the owner makes a change to the task.

- Only the task owner can change the details in a task.