Section 5

Topics Covered

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- ❑ Customising your task list... 5-8
- ❑ Organising your task list 5-9
- ❑ Filtering your task list 5-15
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Time Required: 30 Mins

Creating Tasks

Whereas your calendar allows you to organise your time, the **Tasks** folder allows you to organise your daily duties. For example, if you're involved in a project and have to produce minutes from the last meeting or a report summarising your contribution to the project, you can use the **Tasks** folder to set due dates and reminders for these duties.

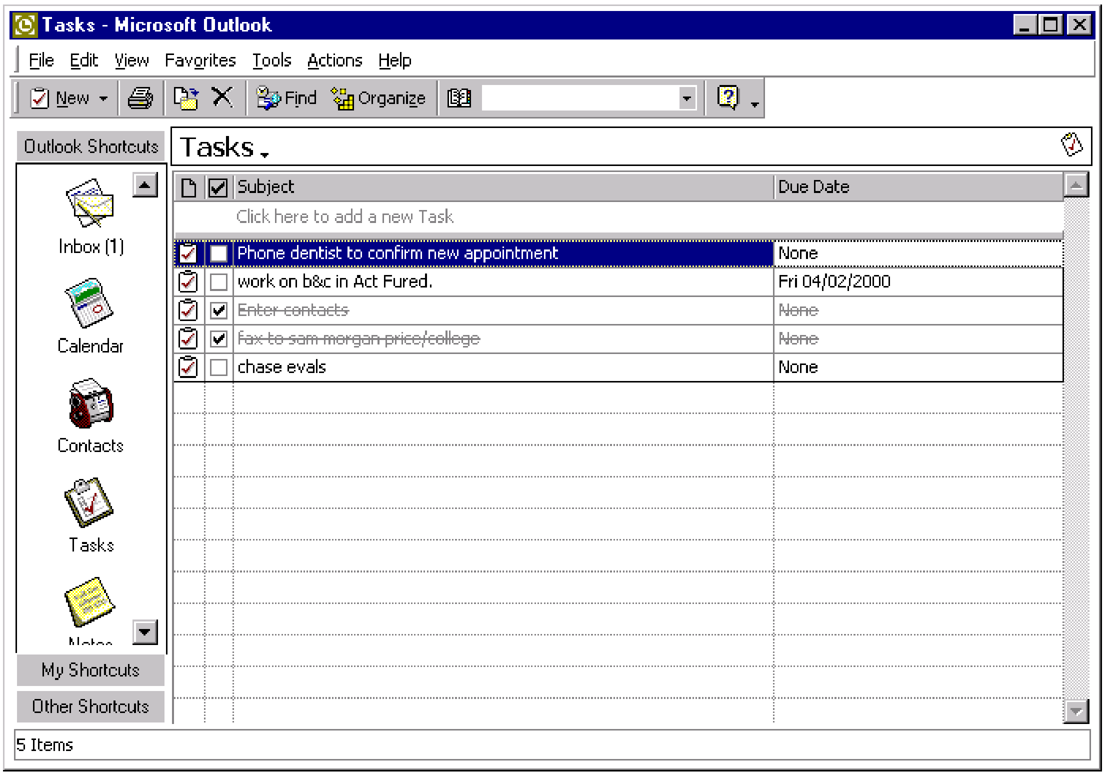
As mentioned in the previous section, you can create a task simply by typing a description into the taskpad shown at the right of the appointment area. However, you can also specify tasks either using the *task list* shown when the **Tasks** folder is selected or the **Task** window, where you can add more detail about each task.

Note: The number and type of columns shown in the task list can be customised, therefore your task list may vary from that shown in the illustration below, which shows the default columns.

To Create a Task Using the Task List

1. Select the **Tasks** folder in the Outlook bar.

   The task list will be displayed.



2. Type a description of the task in the **Subject** box on the top row of the task list.
3. If required, enter a **Due Date**, either by typing it or by choosing from the drop-down list.
4. Press **[ENTER]** to finish.

Creating Tasks

To Create a Task Using the Task Window

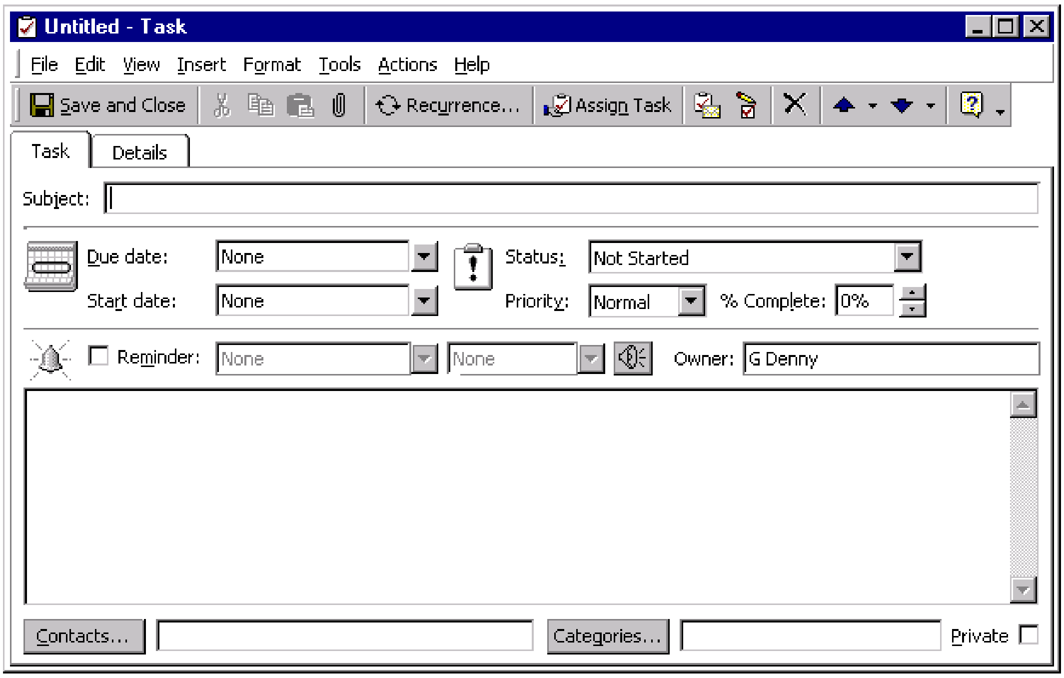
1. **Menu:** Select the **File, New, Task** menu option.

   Click on the button shown on the toolbar.

   Note: If the current folder in the Outlook bar is not the **Tasks** folder, this button will not be displayed on the toolbar. Instead, a button relating to the type of item that can be created in the current folder will be. In this case, click the drop-down arrow to the right of the **New...** button and choose **Task**.

   [CTRL] N when the **Tasks** folder is selected.

   The **Task** window will be displayed.



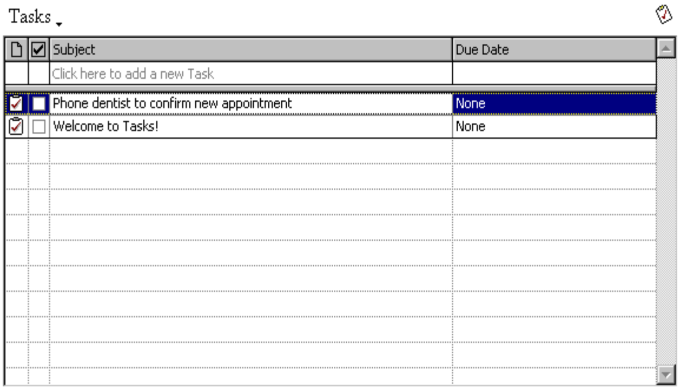
2. Enter the details of the new task.
3. If the task is a recurring task, click the button or choose the **Actions, Recurrence** command and choose the required options. Click **OK** to return to the **Task** window.
4. Click the **Save and Close** button to display your task in the task list.

Exercise 5-1

In this exercise you'll create some tasks using the various methods described.

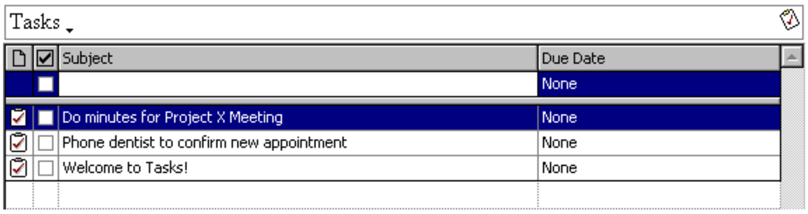
1. In the Outlook bar, click on the **Tasks** folder.

   Your task list is displayed. (As your view of the task list can be customised, yours may show more information that the illustration below.)



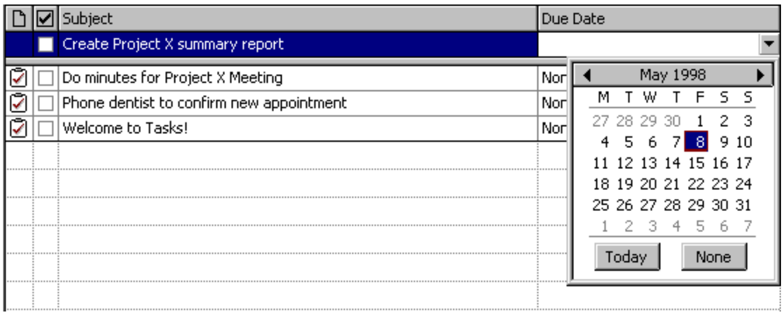
2. Click in the **Subject** box at the top of the task list to add a new task.
3. Type **Do minutes for Project X Meeting** into the **Subject** box.
4. Press **[ENTER]**.

   This task is moved into the body of the task list:



Exercise 5-1

5. Click in the top row again to add another task.
6. Type a **Subject** of **Create Project X summary report**.
7. Click in the **Due Date** box then choose the last working day of this month from the small calendar displayed when you click the drop-down arrow.

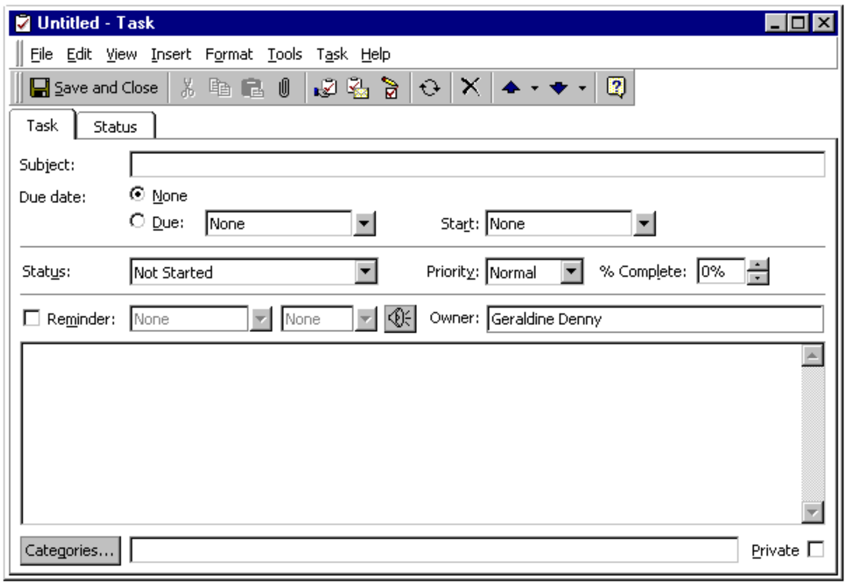


8. Press **[ENTER]** to finish and add this task to your task list.
9. Follow the instructions below to add a task using the **Task** window.

— Click the 

button.

The **Task** window is displayed.



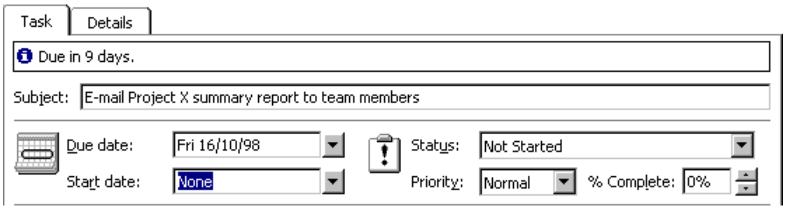
Exercise 5-1

— Type a **Subject** of **E-mail Project X summary report to team members** for the task.

— Edit the entry in the **Due Date** text box to read **next Friday** then press **[TAB]**.

Next Friday is converted to a date. As this is relative to the date settings on your computer, this will be different from the date shown in the illustration below.

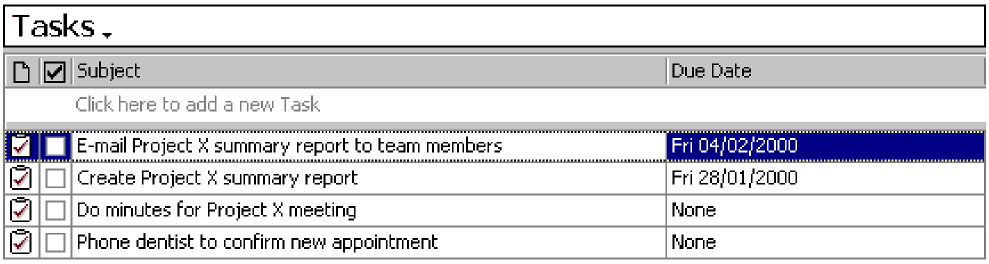
As next Friday is within the next 14 days, a message telling you when the task is due is displayed:



— As it is important that this task is carried out on time, check that a **Reminder** is set for **9am** on the due date.

— Click the **Save and Close** button.

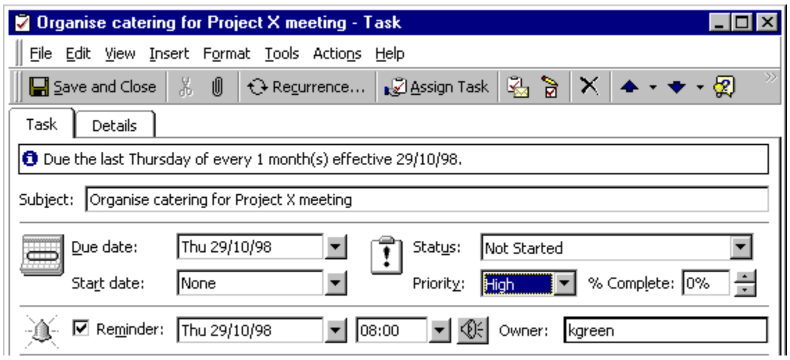
This task is added to your task list.



Notice that the due date is shown in the task list.

Exercise 5-1

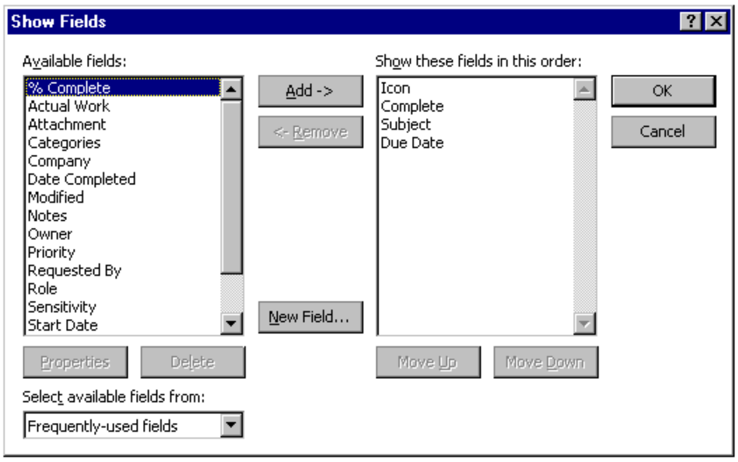
10. Create another new task **Organise catering for Project X meeting**.
11. Choose **High** from the **Priority** drop-down list.
12. Use the **Actions, Recurrence** menu option to make this a recurring task on the last Thursday of every month.



13. Save and close the task.

Customising Your Task List

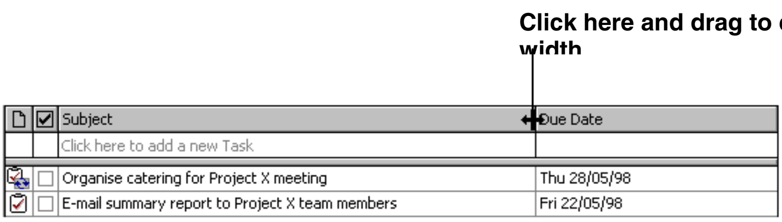
As mentioned earlier, you can change the type and number of columns shown in your task list and any other view that displays information in a table format. Select the **View, Current View, Customize Current View** command and click the **Fields** button to display the **Show Fields** dialogue box.



Choose the field you want to show in the **Available fields** list box then click **Add**. If the field you want isn't shown in the **Available fields** list box, choose another option from the **Select available fields from** drop-down list.

When you've chosen all the fields you want shown, click **OK**.

Note: As the number of fields that can be shown will depend on your system settings and the size of your Outlook window, you may not be able to see the fields you choose. You can adjust the width of any column by clicking and dragging the right edge of the column header:

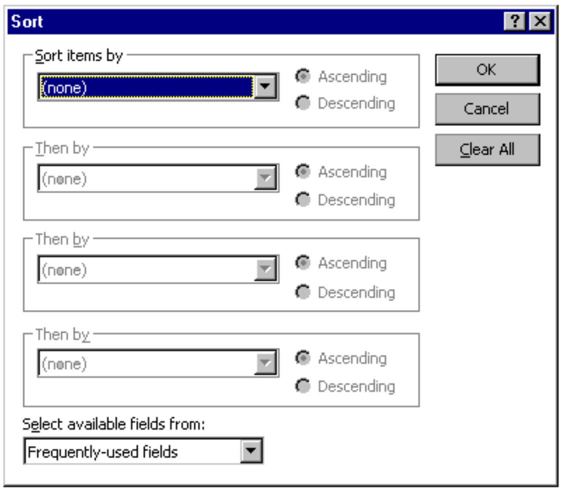


Organising Your Task List

By default your tasks will appear in the task list in the order in which they were created. You can change this order if you prefer. The **View, Current View, Customize Current View** command can be used to access sorting and grouping options for your data. You can use the **Sort** button to simply change the order in which tasks are listed, or you can use the **Group By** button to group together related tasks.

To Sort Tasks

1. Select the **View, Current View, Customize Current View** command and click the **Sort** button.



2. Choose the field whose contents are to be used to sort the tasks from the **Sort items by** drop-down list and select a sort order: **Ascending** (A-Z, 0-9) or **Descending** (Z-A, 9-0).
3. If several tasks contain the same value in the sort field selected above, you can choose to sort by other fields too. If you want to do so, select this field(s) from the **Then by** drop-down list(s) and choose a sort order.
4. When you've chosen the required sort field(s), click **OK**.

Note: To completely remove the sort order, click the **Clear All** button in this dialogue box.

QuickTip: Another way to sort in order of a single column is to click the column header. Click once to sort in ascending order then click again to change to descending order. An arrowhead in the column header indicates the direction of the sort.

Grouping Tasks

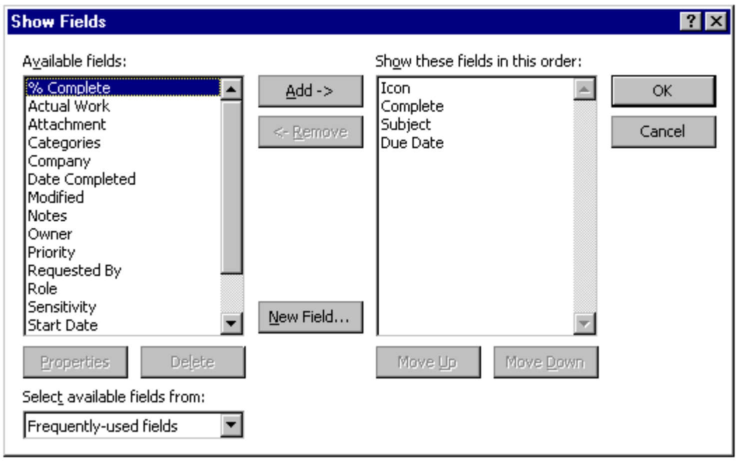
Tasks are grouped in the same way as items in your **Inbox** folder. Select the **View, Current View, Customize Current View** command and click the **Group By** button to access the grouping options for your tasks.

Once you've grouped your tasks you can work with them as described for the Inbox.

Exercise 5-2

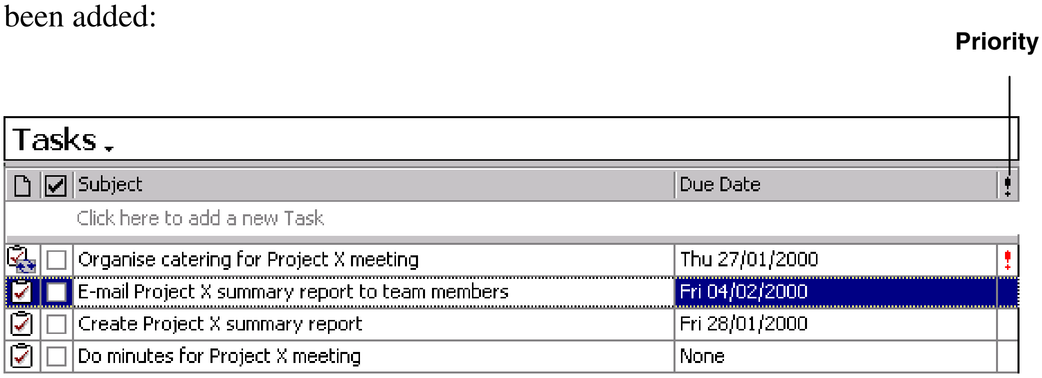
In this exercise you'll customise your task list then sort and group the tasks in it.

1. Select the **View, Current View, Customize Current View** command and click the **Fields** button.



2. Select **Priority** in the **Available fields** list box then click **Add**.

3. Click **OK** then **OK** again to return to your task list and notice that the **Priority** column has been added:

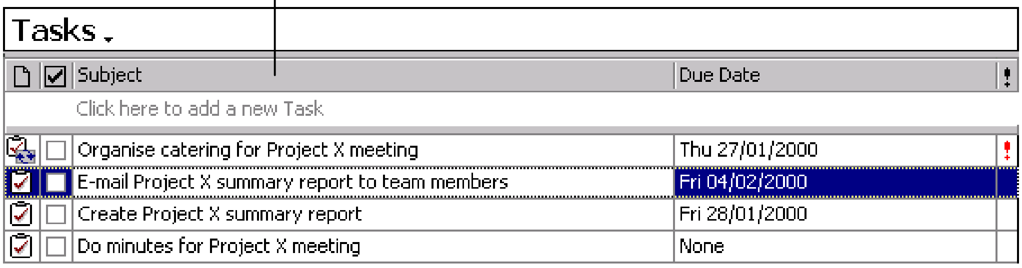


You can now change any task's priority by clicking in this column and choosing from the drop-down list.

Exercise 5-2

4. To sort your task list in ascending order of the contents of the **Subject** field, click on the **Subject** column header:

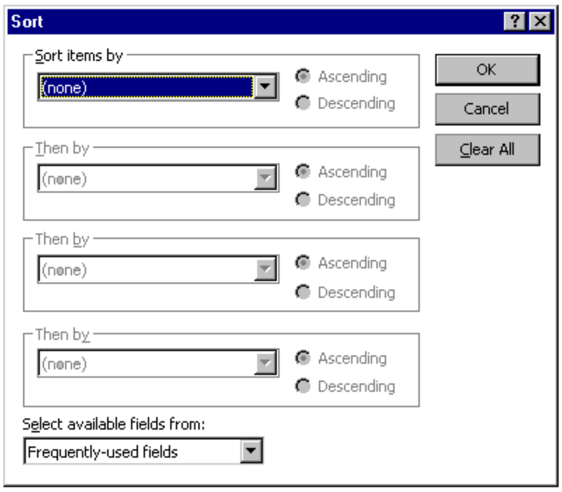
Click here to sort tasks in order of Subject.



5. Follow the instructions below to sort the tasks in order of **Due Date** and then **Subject**.

— Select the **View, Current View, Customize Current View** menu option.

— Click the **Sort** button.



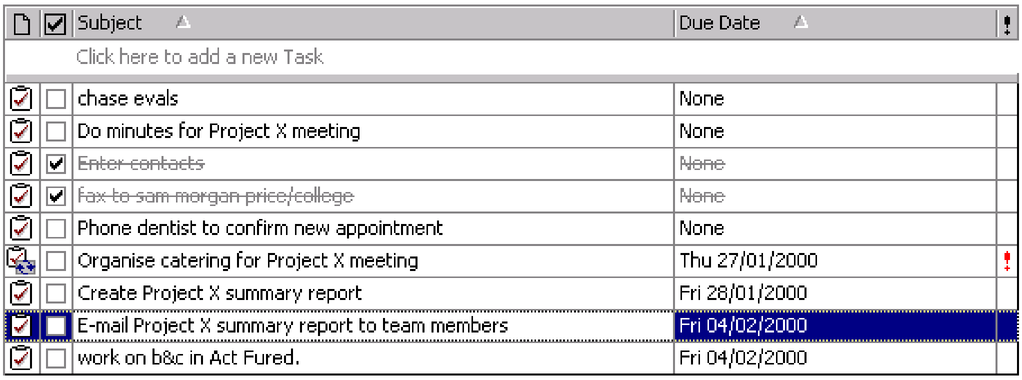
— Choose **Due Date** from the first **Sort items by** drop-down list and select the **Ascending** radio button.

— Choose **Subject** from the second **Sort items by** drop-down list then select the **Ascending** radio button.

Exercise 5-2

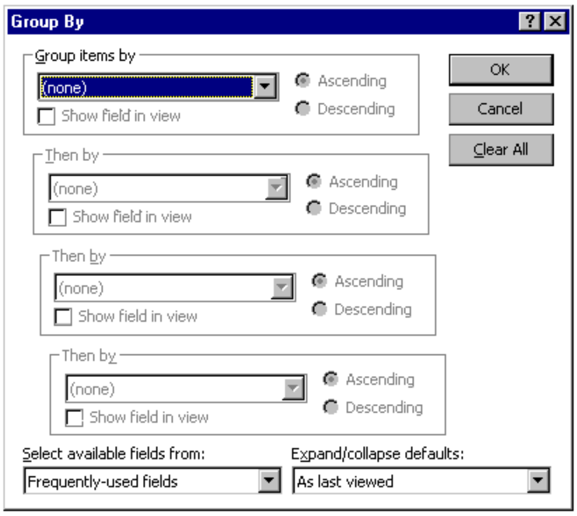
With this sort order the tasks will appear in chronological order. Where more than one task has the same **Due Date**, the tasks will appear in alphabetical order.

— Click **OK** and then **OK** again to see the new sort order:



6. Following the instructions below, group together the tasks with the same priority.

— Select the **View, Current View, Customize Current View** command then click **Group By**.



— Choose **Priority** from the **Group items by** drop-down list then select the **Ascending** radio button.

— Choose **All expanded** from the **Expand/collapse** defaults drop-down list.

Exercise 5-2

— Click **OK** and then **OK** again to see the effect of your selections.

Complete	Subject	Due Date	!
	Click here to add a new Task		
Priority : Normal (8 items)			
☐	chase evals	None	
☐	Do minutes for Project X meeting	None	
☑	~~Enter contacts~~	~~None~~	
☑	~~fax to sam morgan price/college~~	~~None~~	
☐	Phone dentist to confirm new appointment	None	
☐	Create Project X summary report	Fri 28/01/2000	
☐	E-mail Project X summary report to team members	Fri 04/02/2000	
☐	work on b&c in Act Fured.	Fri 04/02/2000	
Priority : High (1 item)			
☐	Organise catering for Project X meeting	Thu 27/01/2000	!

Notice the header for each group: one for **high** priority tasks, one for **normal**. Notice also that the sort order that was previously applied is still active.

7. Select the **View, Current View, Customize Current View** command, click the **Sort** button and select **Clear All** to cancel the sort order.
8. Click **OK** to close this dialogue box.
9. Click the **Group By** button and choose to group by **Due Date** and then **Priority**, both in **descending** order then return to your task list.

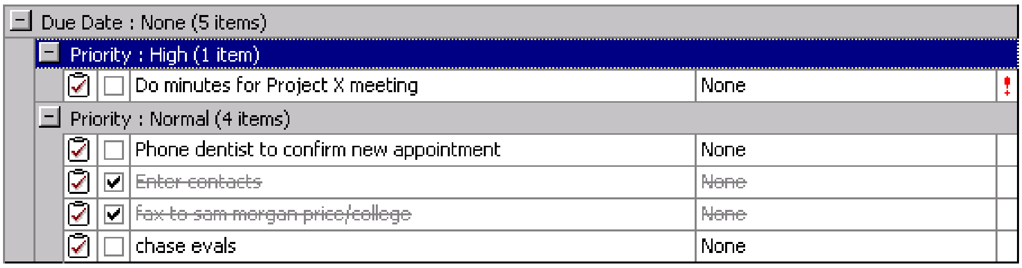
Due Date : 04 February 2000 (2 items)			
Priority : Normal (2 items)			
☐	E-mail Project X summary report to team members	Fri 04/02/2000	
☐	work on b&c in Act Fured.	Fri 04/02/2000	
Due Date : 28 January 2000 (1 item)			
Priority : Normal (1 item)			
☐	Create Project X summary report	Fri 28/01/2000	
Due Date : 27 January 2000 (1 item)			
Priority : High (1 item)			
☐	Organise catering for Project X meeting	Thu 27/01/2000	!
Due Date : None (5 items)			
Priority : Normal (5 items)			
☐	Do minutes for Project X meeting	None	
☐	Phone dentist to confirm new appointment	None	
☑	~~Enter contacts~~	~~None~~	
☑	~~fax to sam morgan price/college~~	~~None~~	
☐	chase evals	None	

10. Change the **Priority** for the task **Do minutes for...** by clicking in the **Priority** column and choosing **High** from the drop-down list.

Exercise 5-2

11. Click away from this column to apply your change.

    The task is now grouped differently:



12. Clear the grouping from your task list.

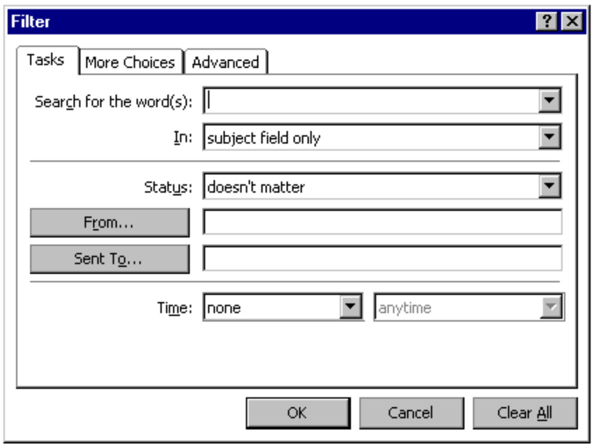
Filtering Your Task List

Filtering your task list allows you to cut down on the number of tasks you see in the Outlook window. You may find it useful, for example, to view only active tasks, i.e. tasks that are not yet complete; or you may want to view only tasks with a particular word or phrase in a certain field.

To Filter Your Task List

1. Select the **View, Current View, Customize Current View** command and click the **Filter** button.

   The **Filter** dialogue box will be displayed.



2. Specify the condition(s) under which tasks should be displayed (these conditions may be combined).

   HelpTip: For detailed help on using any of the options in this dialogue box, click the **?** **Help** button at the top right of the box then click in the field you would like help with.

3. Click **OK** then **OK** again to apply the filter.

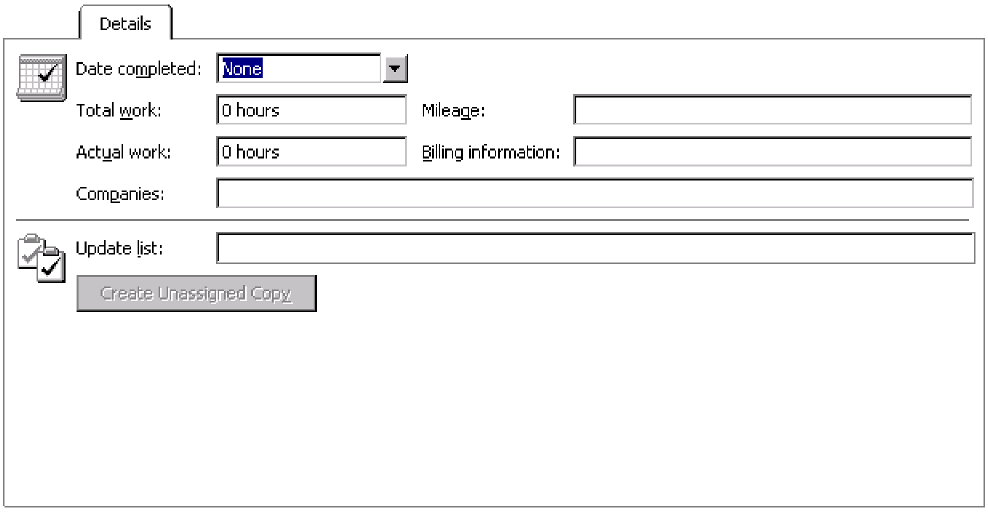
Note: To clear all currently applied filters, click the **Clear All** button in this dialogue box.

Progressing a Task

After you've created a task and you start working on it, you can update it to reflect the progress that you've made. You may, for example, be waiting for someone else to give you their input, or you may just want to record the amount of time that you've spent on the task.

To Progress a Task

1. Select the **File, Open** command or double click on the task in the task list to display its **Task** window.
2. If necessary, enter the date you started work on the task in the **Start Date** box.
3. If necessary, choose the required option from the **Status** drop-down list, e.g. **completed, deferred** or **waiting on someone else**.
4. If necessary, enter a value into the **% Complete** box.
5. Display the **Details** property sheet in the **Task** window.



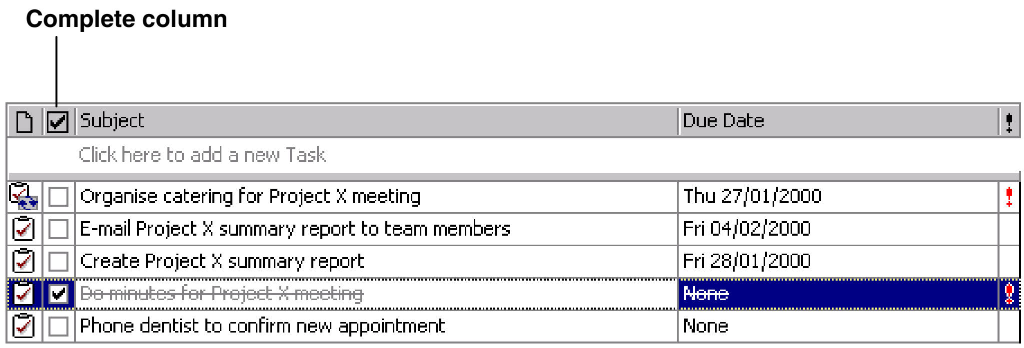
6. Record any required information in this property sheet.
7. When you've finished updating the task information, click the **Save and Close** button.

Note: You can also mark a task as complete in the task list by clicking in the **Complete** column.

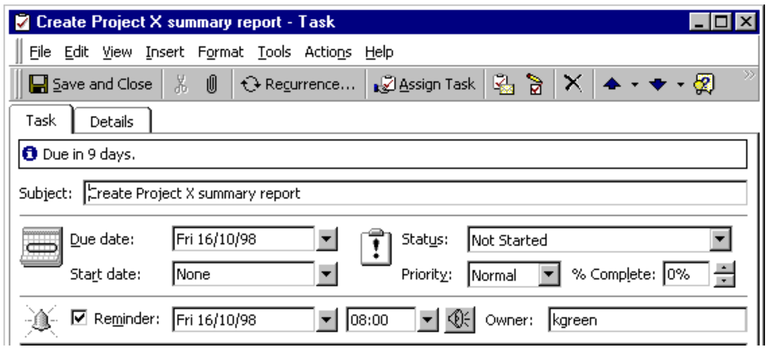
Exercise 5-3

In this exercise, you'll update some of your tasks to reflect the work you've done on them.

1. In the task list, click in the **Complete** column for the task **Do minutes for the Project X Team Meeting**. When you mark a task as complete, a line is drawn through it:



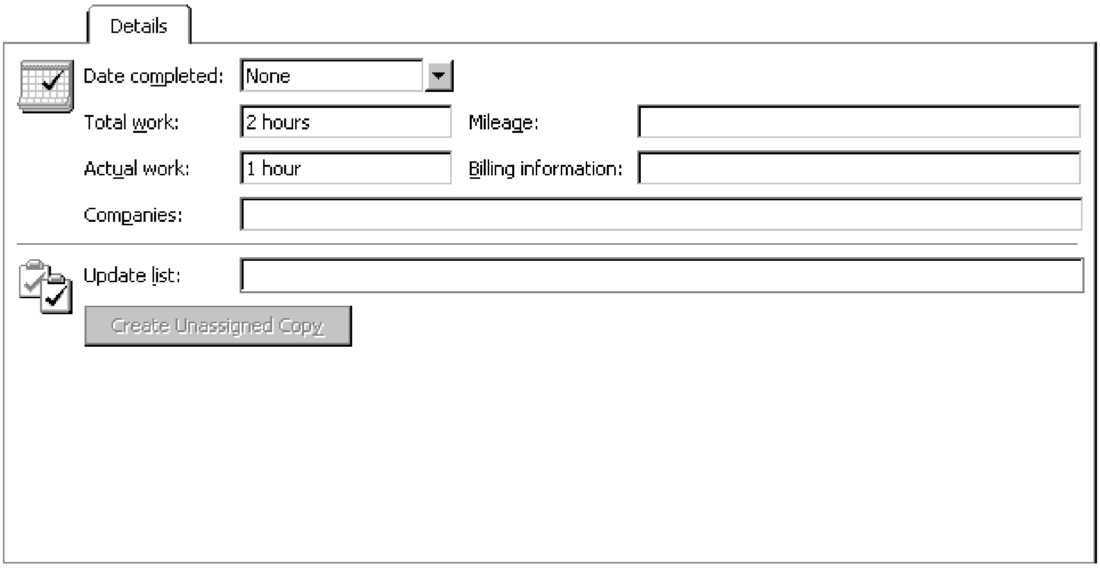
2. Double click on the **Create Project X summary report** task to display its **Task** window.



3. Choose **In progress** from the **Status** drop-down list.
4. In the **% Complete** box, type **50**

Exercise 5-3

5. Click on the **Details** tab to display additional settings for this task.
6. Type **2 hours** into the **Total work** text box then type **1 hour** into the **Actual work** text box.



7. Save and close the task.

Questions and Answers

1. Which menu command would you use to create a new task?

2. Describe how you would add a task using the taskpad.

3. How would you create a recurring task?

4. Give two ways of sorting your tasks into ascending order of subject.

5. Which menu option will allow you to specify grouping options for your task list?

6. If the **Priority** column isn't shown in your task list but has been added to the **Show these fields in this order** list box in the **Show Fields** dialogue box, what could the problem be?

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