

Microsoft Outlook 2013

Lesson 11

Managing Tasks

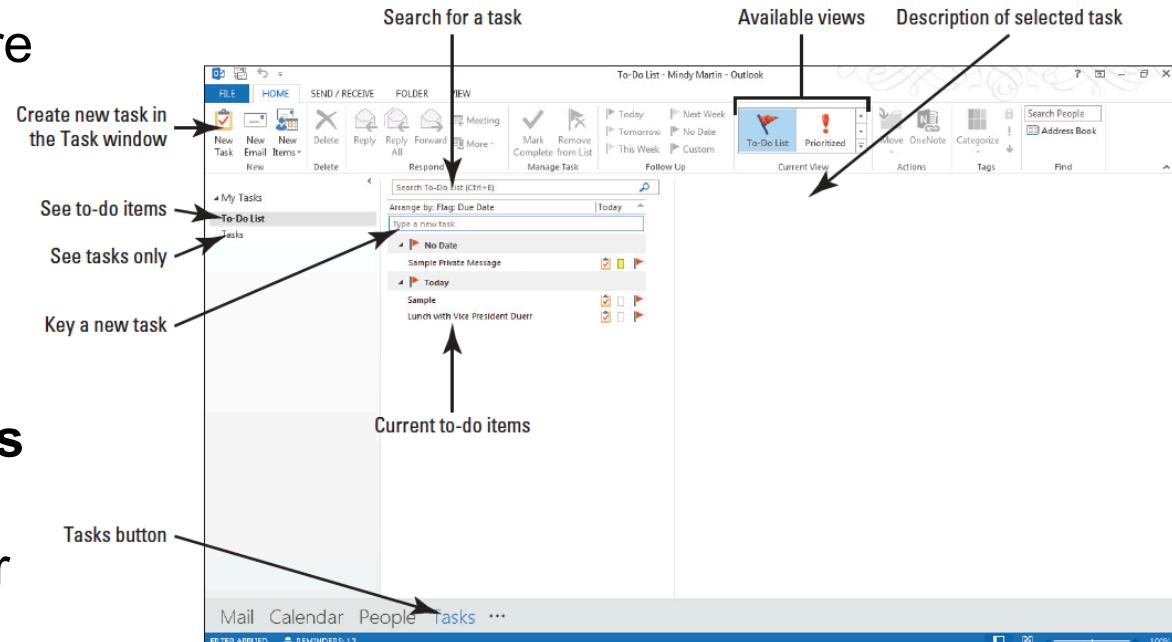
Objectives

Skills	Exam Objective	Objective Number
Creating New Tasks	Create and manage tasks	3.4.1
Working with Task Options	Set Outlook options	1.1.7
	Configure views	1.1.5
Managing and Completing a Task	Create and manage tasks	3.4.1
	Search for tasks	1.4.3
	Print tasks	1.3.6
Working with Assigned Tasks	Create and manage tasks	3.4.1
	Update task status	3.4.5

Step by Step: Create a One-Time Task

- **GET READY.** Before you begin these steps, be sure to launch Microsoft Outlook 2013.

1. If necessary, click the **Tasks** button in the Navigation bar to display the Tasks folder, as shown below.
2. In the *Type a new task* box, key **New Sample Task**. [Press **Enter**.] The new Sample task appears in the To-Do list.

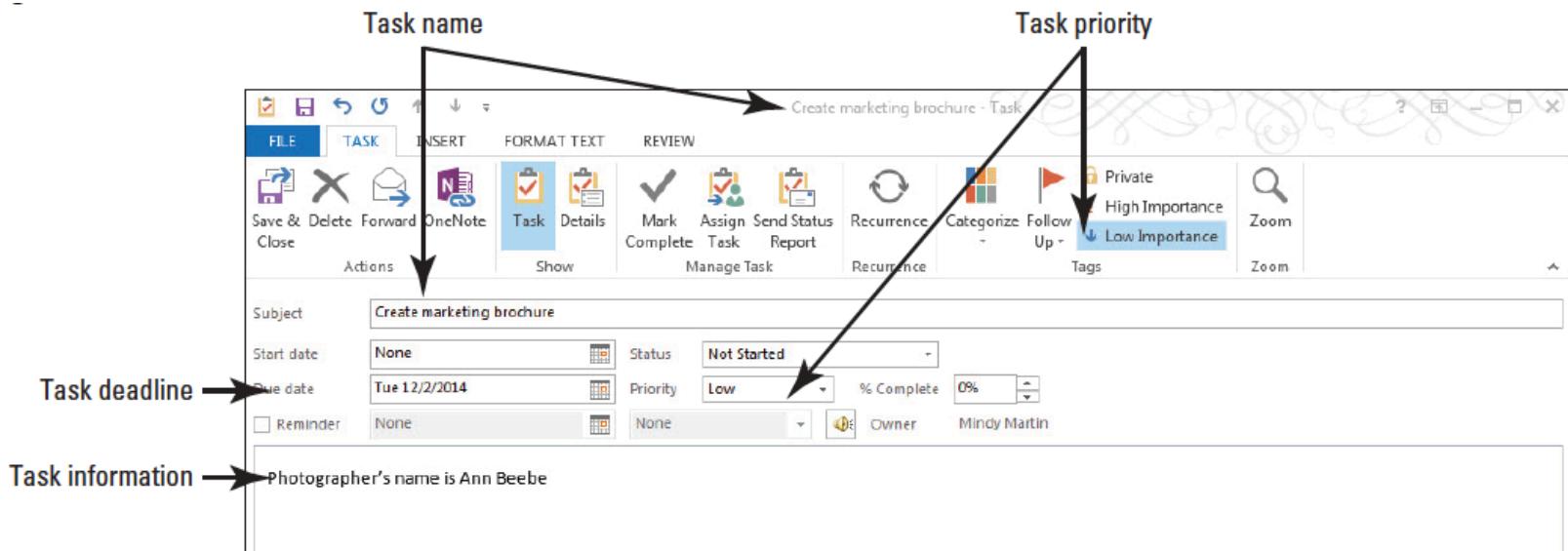


Step by Step: Create a One-Time Task

3. Click **New Task** on the HOME tab. A Task window is displayed.
4. In the **Subject** field, key **Create marketing brochure**.
5. In the **Due date** field, key or select the **[date four weeks from today]**.
6. In the **Priority** field, select **Low**.

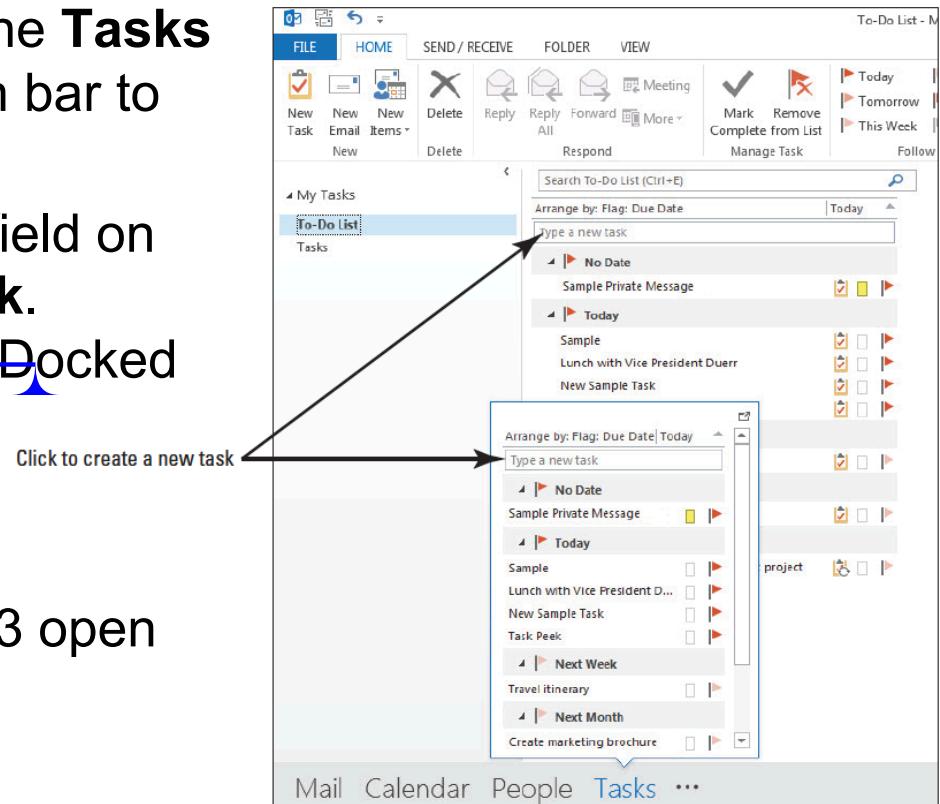
Step by Step: Create a One-Time Task

7. In the task note area, key **Photographer's name is Ann Beebe**. Compare your Task window to the figure below.
8. Click **Save & Close** in the Actions group on the Ribbon. The new task is displayed at the bottom of the To-Do list.



Step by Step: Create a One-Time Task

9. Hover the mouse over the **Tasks** button on the Navigation bar to open the **Tasks peek**.
 10. In the *Type a new task* field on the peek, key **Task Peek**.
[Press **Enter**.] The new  Docked task appears in the To-Do list on the peek, as shown at right.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

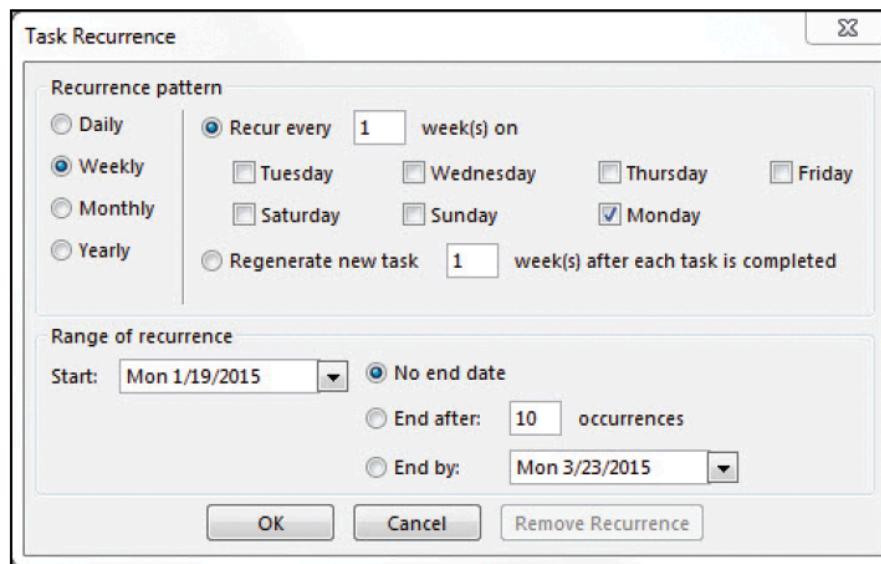


Step by Step: Create a Recurring Task

- **GET READY.** Before you begin these steps, be sure to launch Microsoft Outlook 2013.
 1. If necessary, click the **Tasks** button in the Navigation bar to display the Tasks folder.
 2. Click **New Task** on the HOME tab. A Task window is displayed.
 3. In the Subject field, key **Summarize team's progress on Vault project**.
 4. In the *Start date* field, select the **[second Monday in January of next year]**.

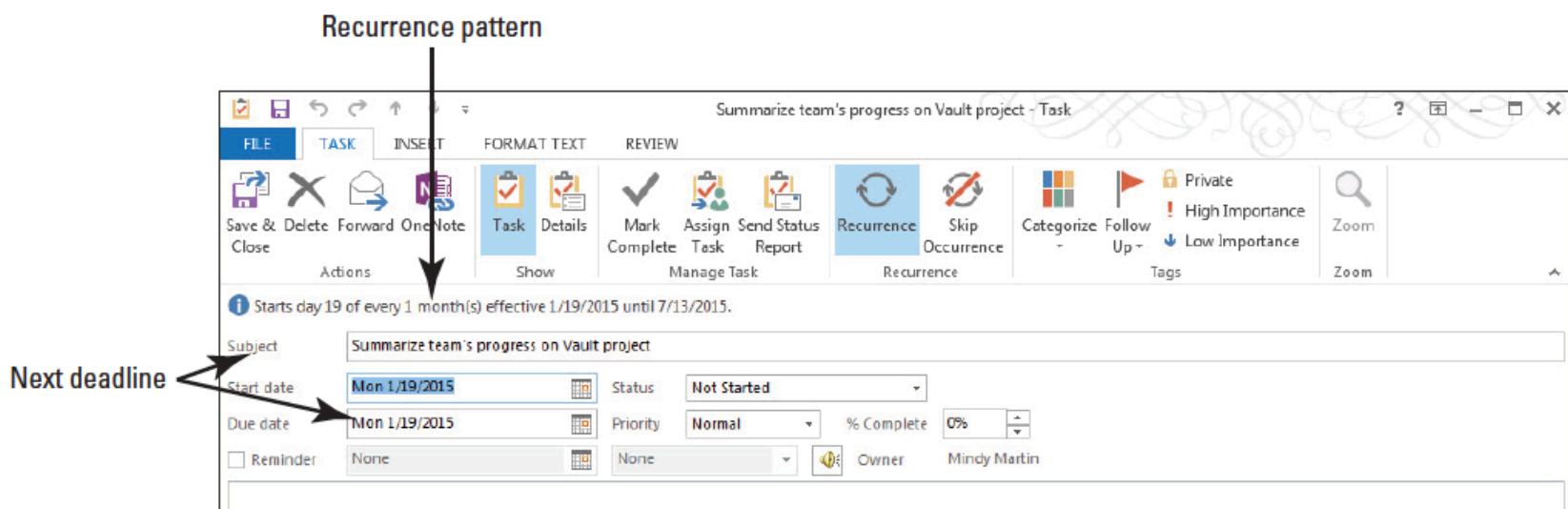
Step by Step: Create a Recurring Task

5. Click the **Recurrence** button in the Recurrence group on the Ribbon. The Task Recurrence dialog box is displayed, as shown below.
6. Select the **Monthly** option in the *Recurrence pattern* area.



Step by Step: Create a Recurring Task

7. Click the **End by** radio button and key or select **{the second Monday in July}**. This ends the recurring task in six months.
8. Click **OK** to return to the Task window. Compare your Task window to the figure below. Depending on the current date, the number of days before the first deadline will differ.



Step by Step: Create a Recurring Task

9. Click **Save & Close** in the Actions group on the Ribbon.
 10. Examine your **To-Do List**. The new task is displayed below a heading. The heading title depends on the amount of time between today's date and the first deadline.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Create a Task from a Message

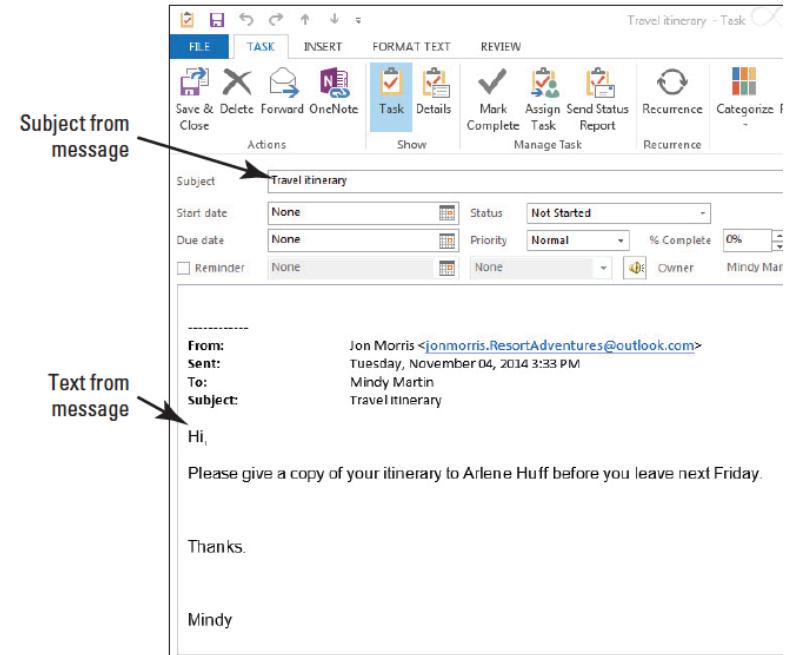
- **GET READY.** Before you begin these steps, be sure to launch Microsoft Outlook 2013. This exercise requires exchanging messages with another Outlook 2013 user with an active email account who can respond to a message or who has the ability to access and use another user's Outlook 2013 profile.
 1. Click **New Email** on the HOME tab to display a Message window.
 2. Click the **To** field and key **[the recipient's email address]**. The recipient is the Outlook 2013 user who will create a task from this message.
 3. Click the **Subject** field and key **Travel Itinerary**.

Step by Step: Create a Task from a Message

4. In the message area, key the following message: **Hi,**
[Press Enter] **Please give a copy of your itinerary to**
Arlene Huff before you leave next Friday. **[Press**
Enter twice.] **Thanks.** **[Press Enter twice.]** **Mindy.**
5. Click the **Send** button to send the message.
6. In the recipient's account, in the Mail folder, click **Send/**
Receive All Folders if the Travel Itinerary message has
not arrived.
7. Click the **Travel Itinerary** message in the message list.

Step by Step: Create a Task from a Message

8. Drag it to the **Tasks** button on the Navigation bar and drop it there. A Task window containing information from the message is automatically opened, as shown at right.



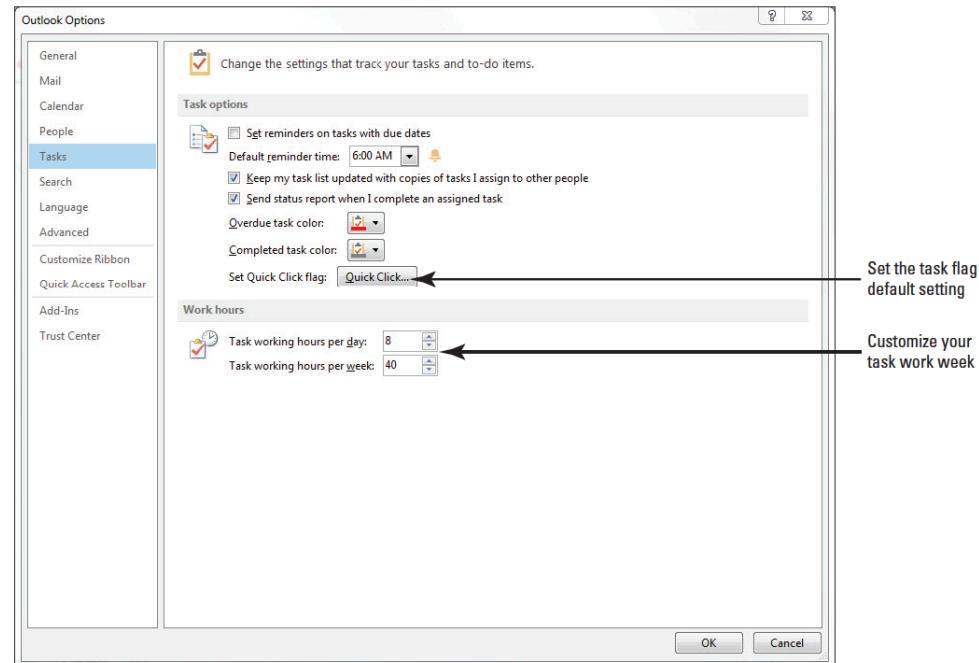
Step by Step: Create a Task from a Message

9. In the Task window, click the **Due date** field. Key or select ~~next Friday's date~~.
 10. Click **Save & Close** in the Actions group on the Ribbon.
 11. Hover over the **Tasks** button in the Navigation bar to display the Tasks peek. Examine your Tasks peek. The new task is displayed below the Next Week heading.
- **PAUSE. CLOSE** the recipient's Outlook 2013 account and return to your own if necessary. If you exchanged tasks with another user so that you received the task in your mailbox, leave Outlook 2013 open to use in the next exercise.

Step by Step: Set Task Options

- **GET READY.** Before you begin these steps, be sure to launch Microsoft Outlook 2013.

1. On the FILE tab, click **Options**. The Outlook Options dialog box opens.
2. Click **Tasks** in the Navigation Pane. The Outlook Options dialog box displays Task options, as shown above.



Step by Step: Set Task Options

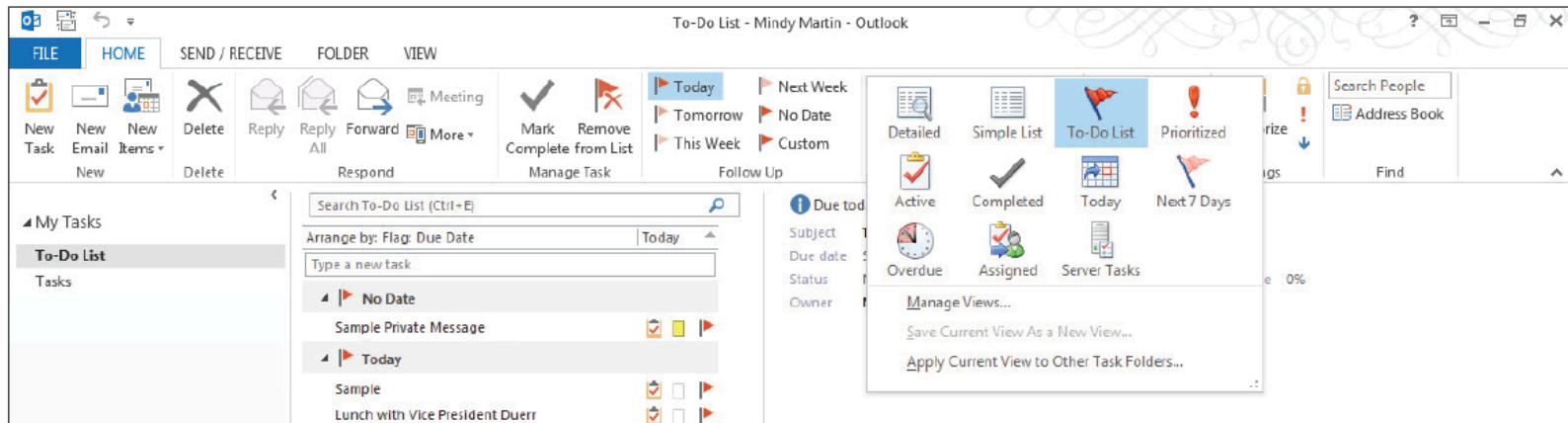
3. Under the *Task options* area, click the **Quick Click** button. The Set Quick Click dialog box opens.
4. From the drop-down menu, select **Tomorrow**.
5. Click **OK**. The next time you want to flag a Mail message or a contact, click the flag column to have Outlook 2013 set the due date to *Tomorrow*.
6. In the *Work hours* area, key or select **4** in the *Task working hours per day:* box to indicate that you work only four hours a day on tasks.
7. In the *Task working hours per week:* field, key or select **20**.
8. Click **OK**.



- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Work with Task Views

- **GET READY.** Before you begin these steps, be sure to launch Microsoft Outlook 2013.
 1. If necessary, click the **Tasks** button in the Navigation bar to display the To-Do List.
 2. Click the **More** button in the Current View group. The Current View gallery is displayed, as shown below.

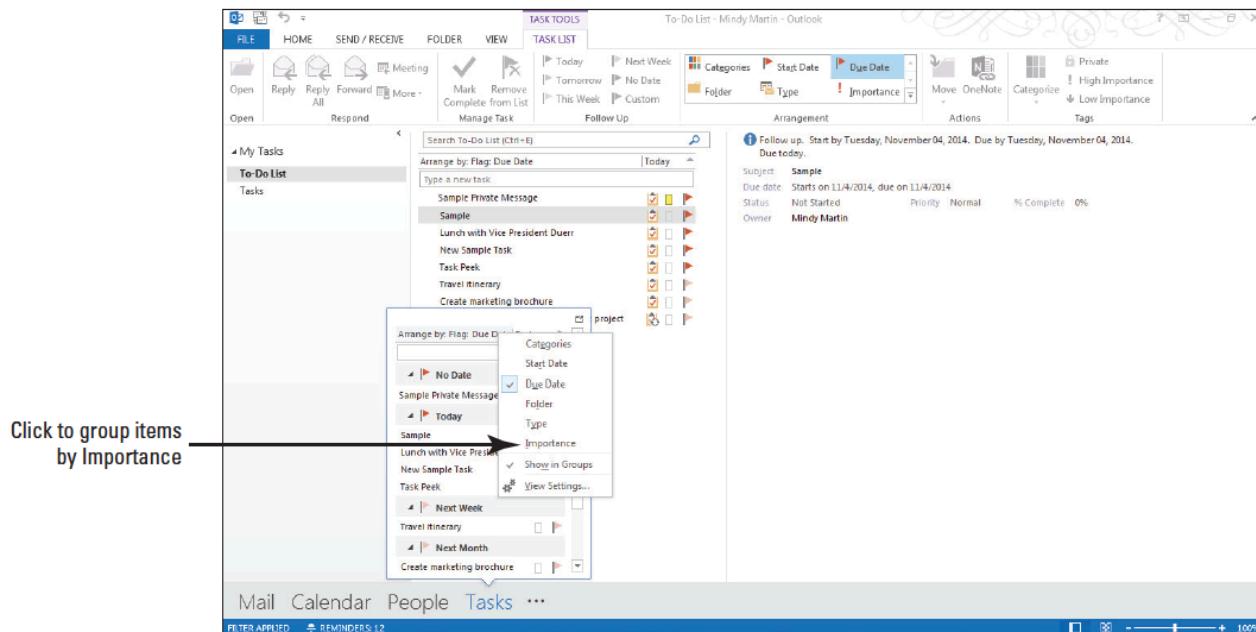


Step by Step: Work with Task Views

3. Select **Detailed**. The Tasks view changes to show all the details about the tasks in your To-Do List.
4. Repeat **Step 2** for each of the views on the Current View dropdown menu. Take note of how the task list changes in each view.
5. Click the **VIEW tab** and click the **Change View** button in the Current View group.
6. Select **To-Do List** to return to the default view.
7. Click the **More** button in the Arrangement group and click the **Show in Groups** option to deselect it.

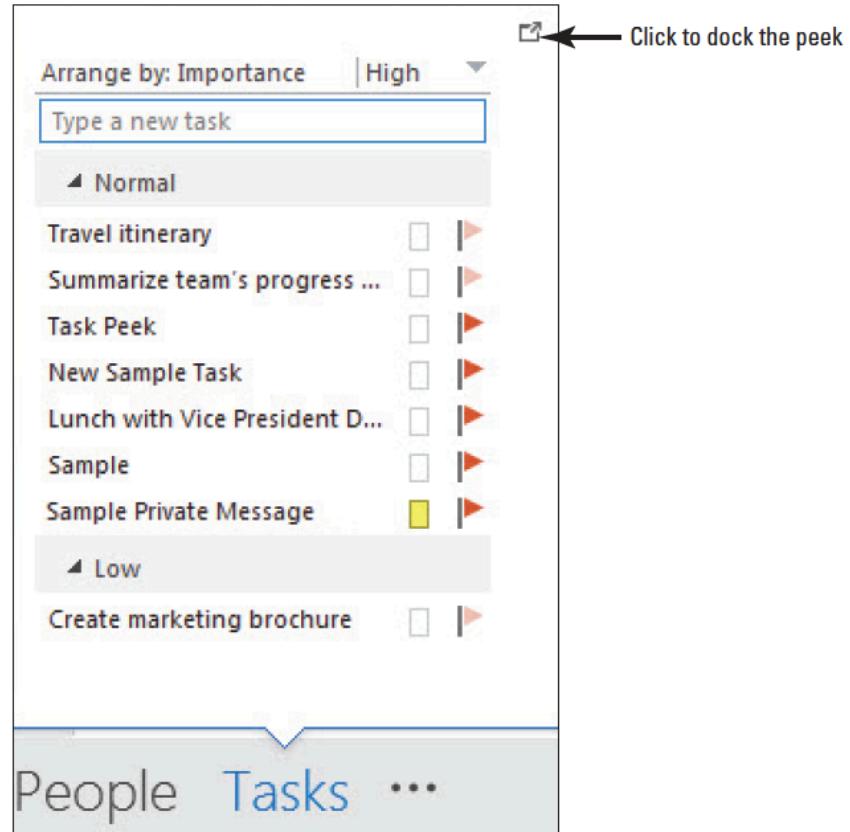
Step by Step: Work with Task Views

8. Hover the mouse over the **Tasks** button in the Navigation bar.
9. Click the **Arrange By:** heading in the **Peek**. A list of options is displayed, as shown below.



Step by Step: Work with Task Views

10. If necessary, click the **Importance** option to select it. The items in the Task peek are grouped by importance, as shown at right.
11. When prompted, click **Yes** to confirm that you want to reset the view.

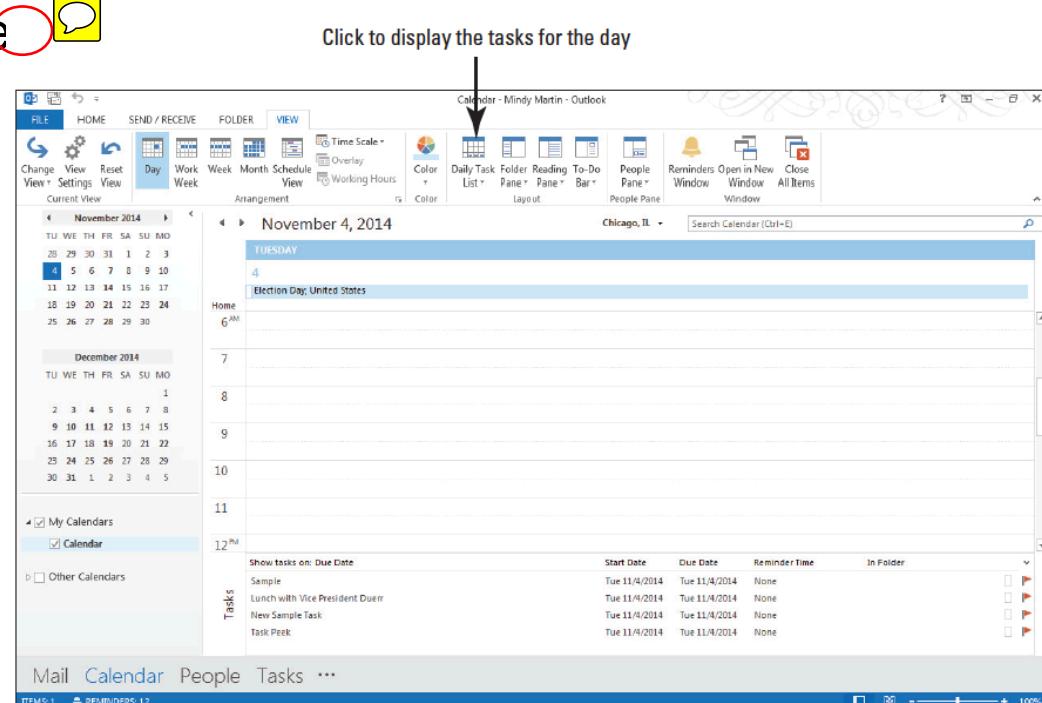


Step by Step: Work with Task Views

12. Because tasks have due dates, you also can view your daily tasks in the Calendar. Click the **Calendar** button in the Navigation bar.

13. Click the **Day** button in the Arrangement group on the **VIEW** tab.

14. In the Layout group, click the **Daily Task List** button and select the **Normal** option. The Daily Task List appears at the bottom of the window, as shown above.

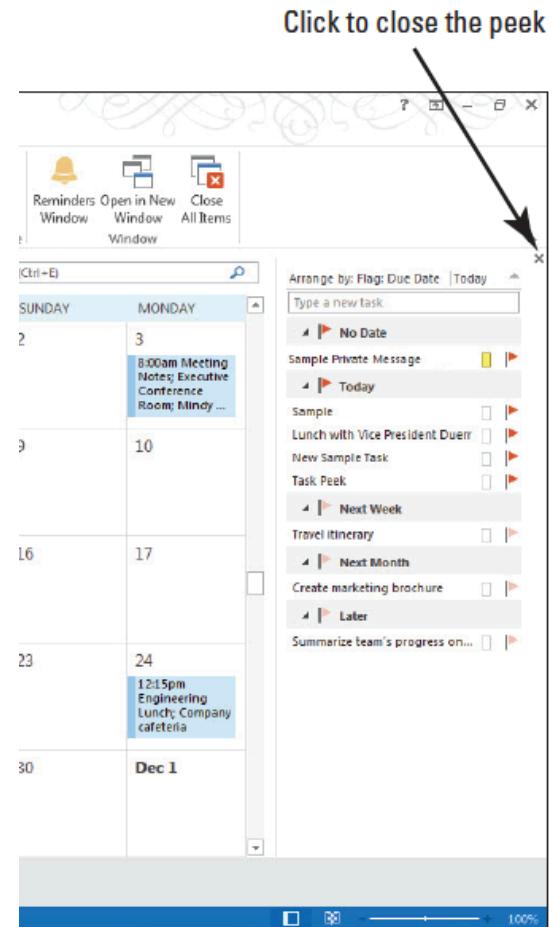


Step by Step: Work with Task Views

15. Click the **Week** button in the Arrangement group on the VIEW tab. Notice that each day's tasks are listed at the bottom of the calendar.
16. Click the **Month** button in the Arrangement group and notice that the tasks are no longer visible. To view your tasks and calendar together, you can hover over the Tasks button on the Navigation bar to display the peek or you can dock the peek to the right side of the Outlook 2013 window.

Step by Step: Work with Task Views

17. Hover over the **Tasks** button on the Navigation bar to display the Tasks peek. Click the **Dock the Peek** icon in the upper-right corner of the peek. The Tasks peek appears on the right side of the Outlook 2013 window, as shown at right.
 18. Click the **Close** button in the upper-right corner of the docked peek.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

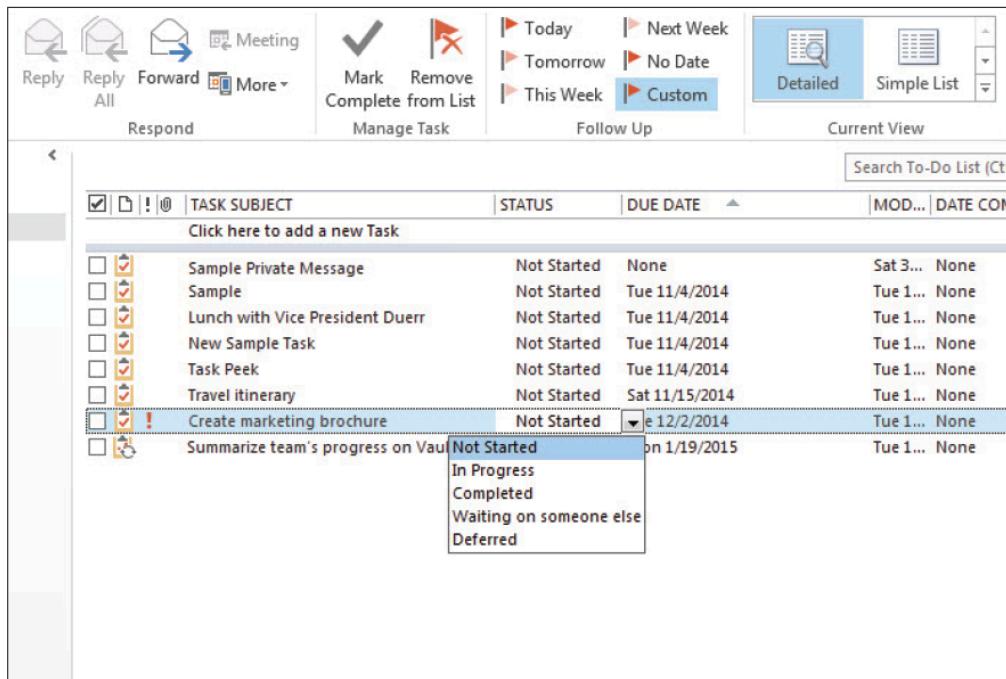


Step by Step: Update a Task

- **GET READY.** Before you begin these steps, you must have launched Microsoft Outlook 2013 and completed the first exercise in this lesson.
 1. If necessary, click the **Tasks** button in the Navigation bar to display the Tasks folder.
 2. On the HOME tab, click **Detailed** in the Current View gallery.
 3. Click the **Create marketing brochure** task in the list. You know that your company cannot launch the Big Blue product line without your marketing brochure, so you will need to start work on it right away.
 4. Click the **High Importance** icon in the Tags group to reflect its importance relative to other tasks.

Step by Step: Update a Task

5. Click the **Status** field for this same task. A drop-down list of status options is displayed.
Compare your Task window to the figure at right.
6. Select **In Progress** to indicate that you have started work.

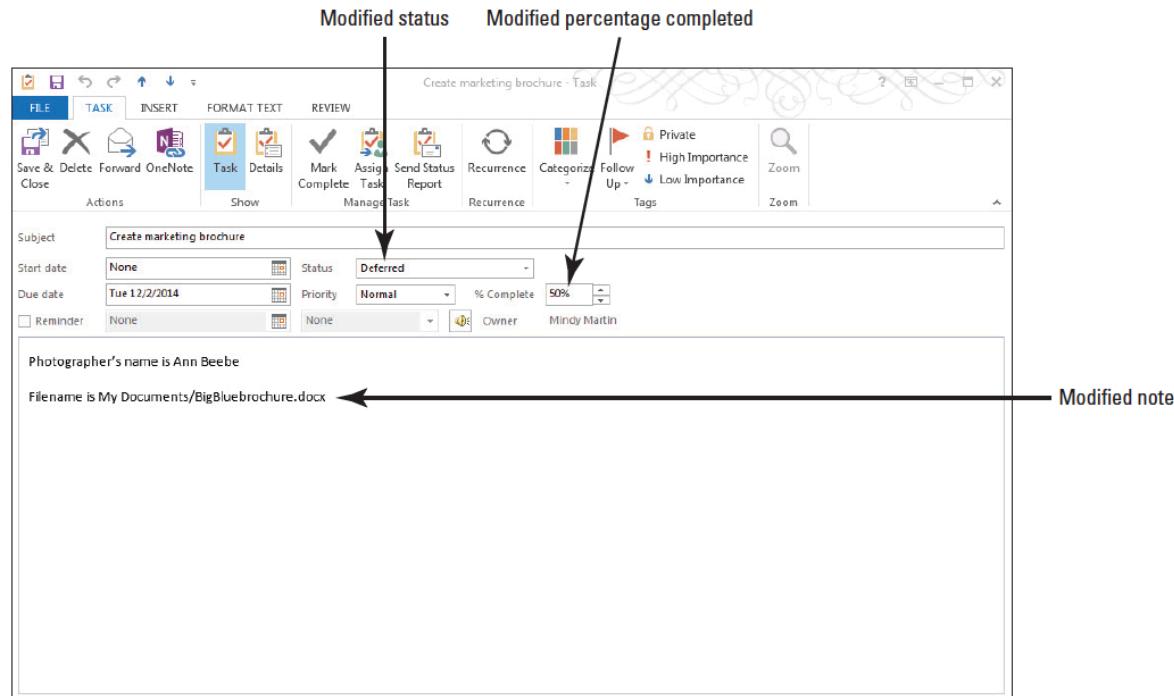


Step by Step: Update a Task

7. Halfway through your work on the brochure, your manager stops by your desk to let you know that the release date for Big Blue has been delayed. You decide to change the status of your task to Deferred and move on to something else. Double-click the **Create marketing brochure** task. The task is opened in a Task window.
8. Click the **Status** field and select **Deferred**.
9. Click the **% Complete** field and key or select **50%**.
10. In the task note area, key the additional text: **Filename is My Documents/-BigBluebrochure.docx**.

Step by Step: Update a Task

11. Click the **High Importance** icon in the Tags group to deselect it. Compare your Task window to the figure below.
12. Click **Save & Close** in the Actions group on the Ribbon.



Step by Step: Update a Task

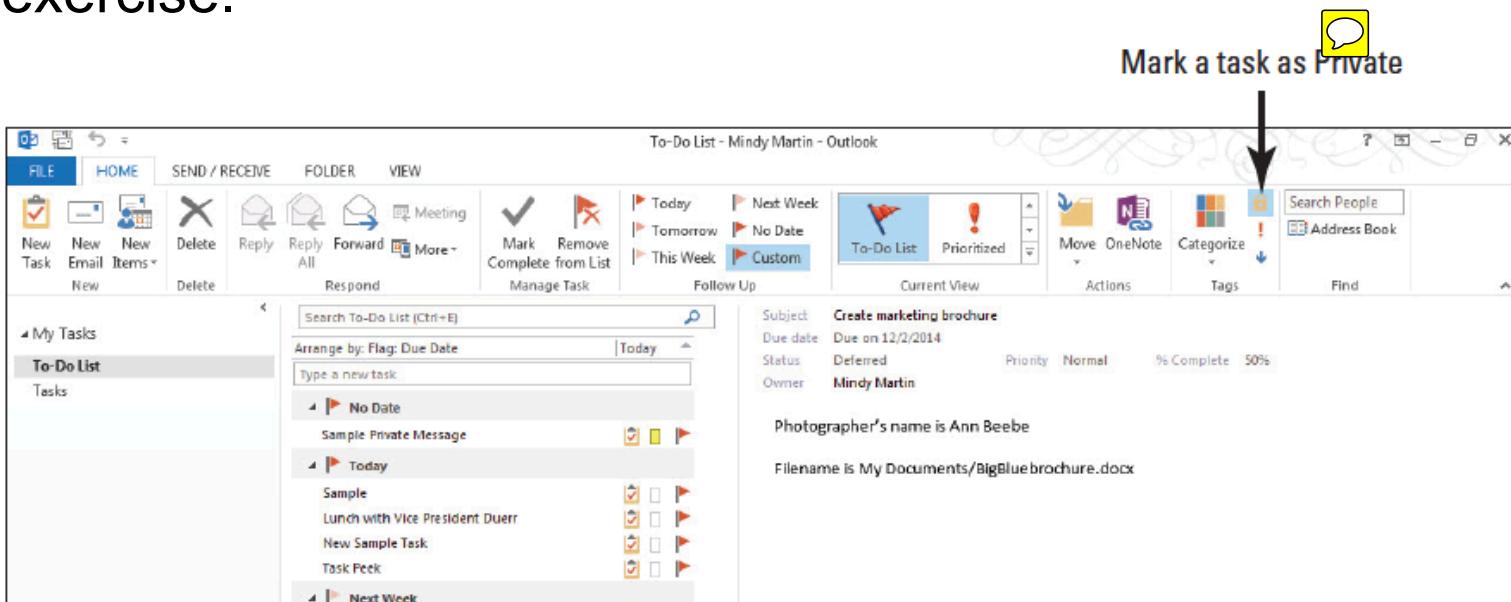
13. Click the **Travel Itinerary** task in the Task list. Notice that the **Next Week icon** is highlighted in the Follow Up group on the HOME tab.
 14. Click the **Tomorrow** icon in the Follow Up group on the HOME tab.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Make a Task Private

- **GET READY.** Before you begin these steps, you must have launched Microsoft Outlook 2013 and completed the previous exercise.
 1. If necessary, click the **Tasks** button in the Navigation bar to display the Tasks folder.
 2. Click the **Create marketing brochure** task and, if necessary, click the HOME tab.

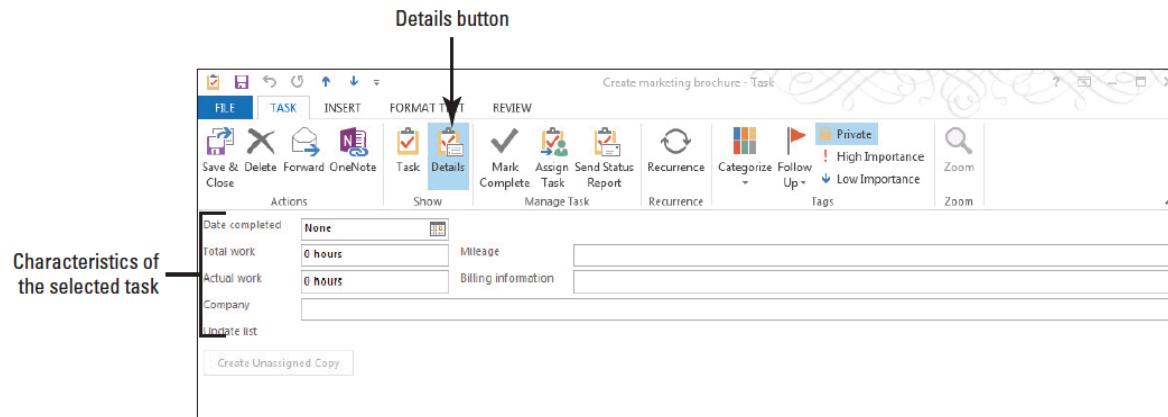
Step by Step: Make a Task Private

3. Click the **Private** button in the Tags group. The task is classified as private, as shown below.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.



Step by Step: Manage Task Details

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running.
 1. If necessary, click the **Tasks** button in the Navigation bar to display the Tasks folder.
 2. Double-click the **Create marketing brochure** task. The task is opened in a Task window.
 3. Click **Details** in the Show group. The details fields are displayed in the Task window, as shown below.



Step by Step: Manage Task Details

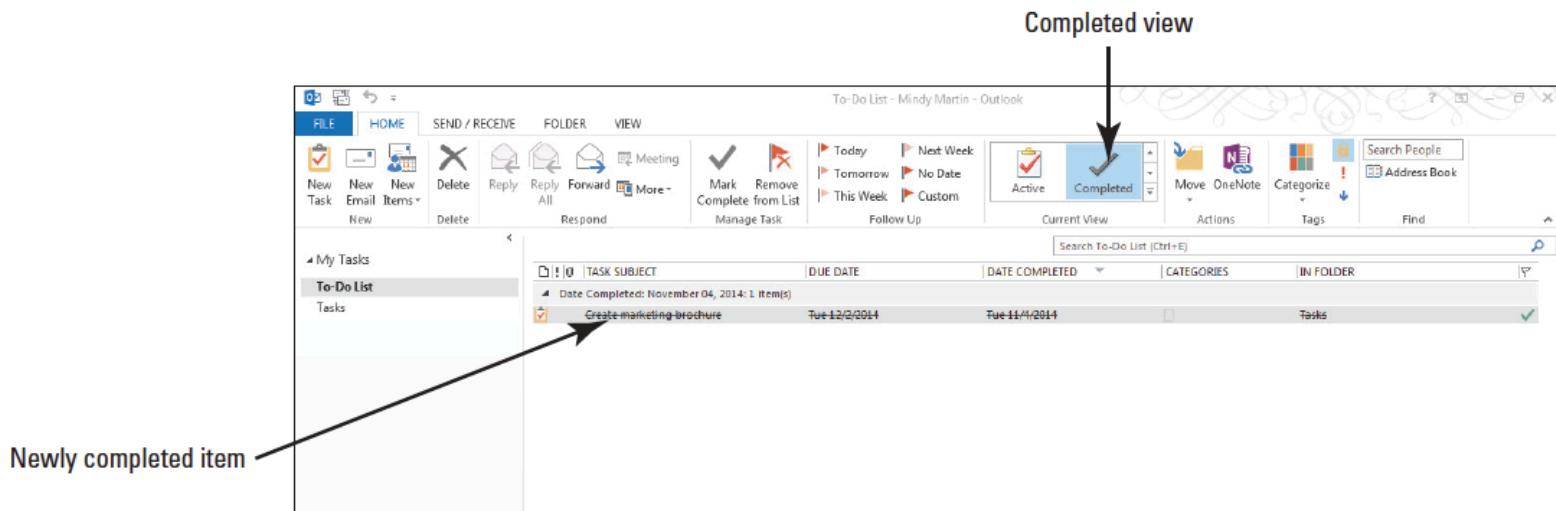
4. In the **Company** field, key **Big Blue merger**, the company's code name for its new product line.
 5. In the *Actual work* field, key **23 hours** to indicate the amount of time that you have worked on the project.
 6. Click **Save & Close**.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Mark a Task as Complete

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running. Before you begin these steps, be sure to complete the first exercise in this lesson.
 1. If necessary, click the **Tasks** button in the Navigation bar to display the Tasks folder.
 2. Click the follow-up flag next to the **Create marketing brochure** task on the Task list. The task is moved to the Completed Tasks list so it is no longer displayed on your To-Do List.

Step by Step: Mark a Task as Complete

3. Click the **HOME** tab. In the Current View gallery, click the **Completed** button to view all of your completed tasks, as shown below.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

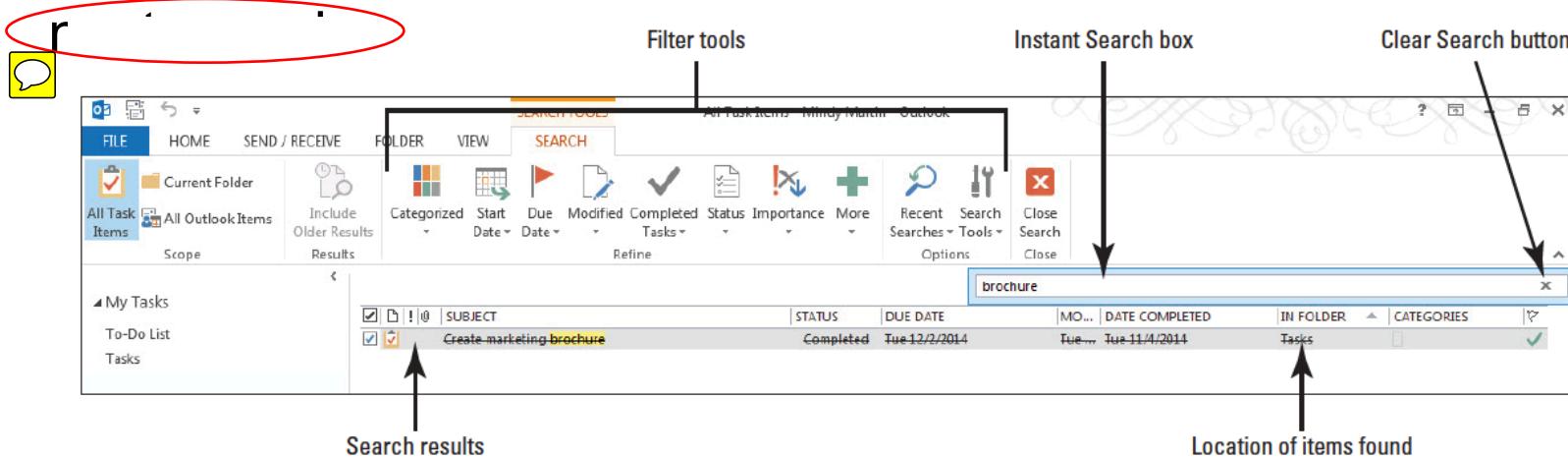


Step by Step: Search for Tasks

- **GET READY.** Before you begin these steps, launch Microsoft Outlook 2013 and make sure that Instant Search is enabled. You must have completed the previous exercises in this lesson.
 1. In your account, click the **Tasks** button in the Navigation bar to display the Tasks folder if necessary.
 2. Click the **More** button in the Current View group to open the Current View gallery of the Ribbon and select **Simple List** from the drop-down menu.
 3. Click the **Search To-Do List (Ctrl+E)** box. The SEARCH TOOLS tab is displayed.

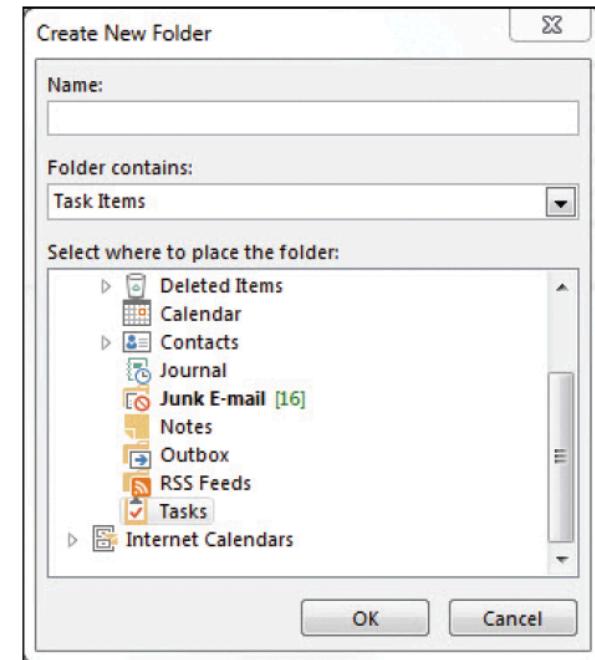
Step by Step: Search for Tasks

4. Verify that **All Task Items** is selected in the Scope group.
 5. Key **brochure**. As you key the search text, Outlook 2013 displays the matching task items in any folder, as shown below.
- **PAUSE. LEAVE** the Instant Search results open to use in the



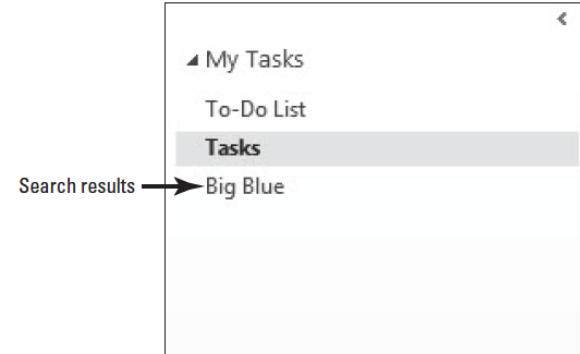
Step by Step: Move or Copy a Task to Another Folder

- **GET READY. LAUNCH** Microsoft Outlook 2013 and ensure that Instant Search is enabled. Complete the previous exercises in this lesson.
 1. Right-click on the **Tasks** folder in the Folders Pane.
 2. Select **New Folder** from the shortcut menu. A Create New Folder dialog box opens, as shown at right.
 3. In the **Name:** field, key **Big Blue**.



Step by Step: Move or Copy a Task to Another Folder

4. Click the **Tasks** folder in the *Select where to place the folder:* area.
 5. Click **OK** to create a new folder, as shown  at right.
 6. In the Instant Search results, select the **Create marketing brochure** task.
 7. Drag the item over the new Big Blue folder to move it.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.



Step by Step: Print Tasks

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running.
 1. In your account, click the **Tasks** button in the Navigation bar to display the To-Do List. Click the **Tasks** folder, if necessary.
 2. Click the **FILE** tab and select **Print**.
 3. Select **Table Style** from the Settings pane to see a preview of your printout, as shown below. Click **Print**.

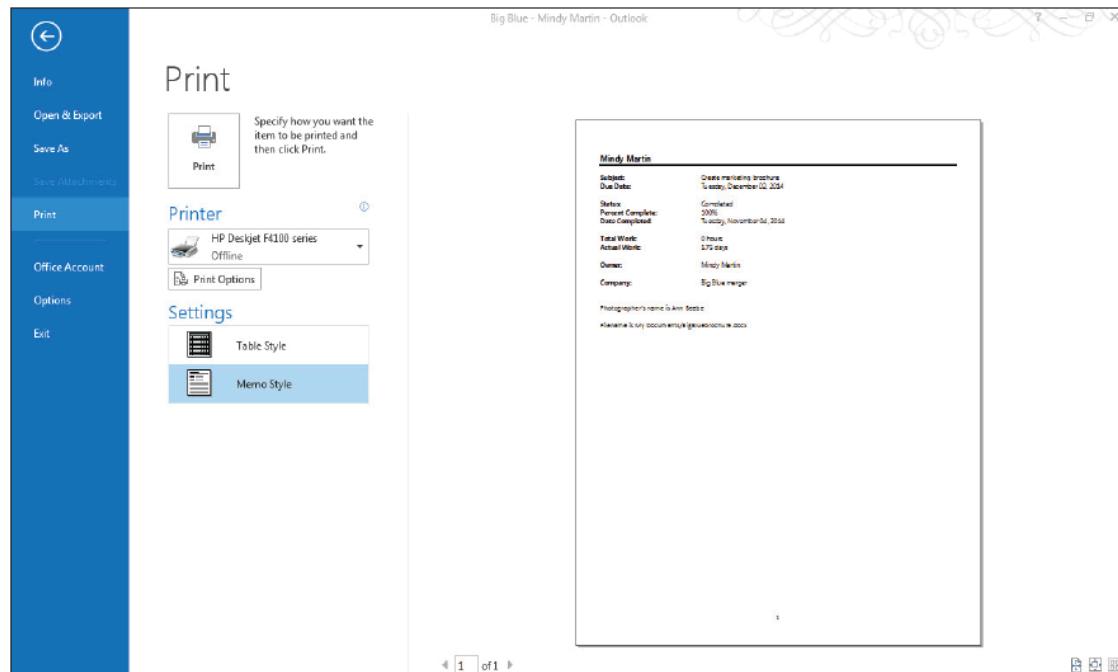
SUBJECT	DU DATE	CATEGORIES
<input checked="" type="checkbox"/> Sample Private Message	None	
<input checked="" type="checkbox"/> Task Peek	Tue 11/4/2014	
<input checked="" type="checkbox"/> New Sample Task	Tue 11/4/2014	
<input checked="" type="checkbox"/> Lunch with Vice President Duerr	Tue 11/4/2014	
<input checked="" type="checkbox"/> Sample	Tue 11/4/2014	
<input checked="" type="checkbox"/> Travel itinerary	Wed 11/5/2014	
<input checked="" type="checkbox"/> Summarize team's progress on Vault project	Mon 1/19/2015	Yellow Category

Step by Step: Print Tasks

4. In the Folders Pane, click the **Big Blue** folder to display the completed Create ~~M~~ Marketing ~~T~~ Brochure task.
5. Double-click the **Create marketing brochure** task to open it. Click the **FILE** tab and select **Print**.

Step by Step: Print Tasks

6. Select **Memo Style** from the Settings pane to see a preview of your printout, as shown below.
 7. Click **Print**.
- **PAUSE. LEAVE**
Outlook 2013
open to use in
the next exercise.

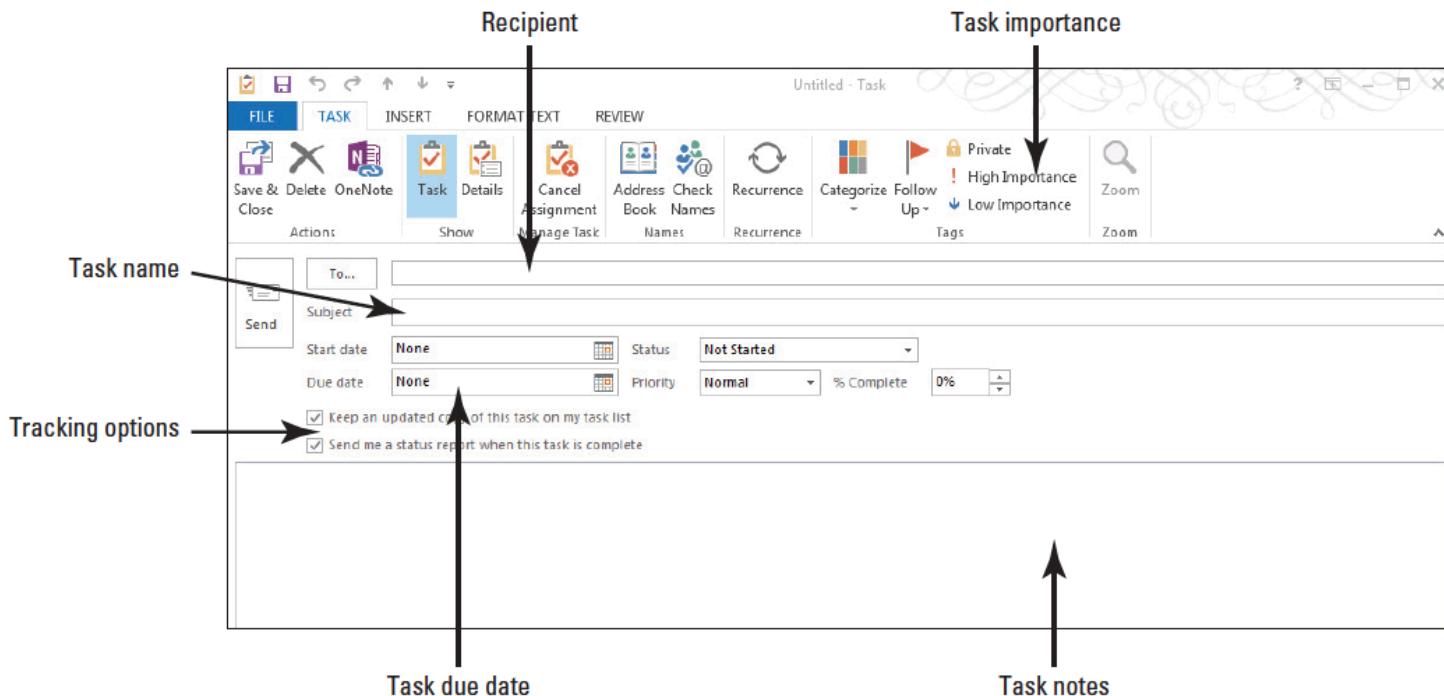


Step by Step: Assign a Task to Another Outlook User

- **GET READY. LAUNCH** Microsoft Outlook 2013 if it is not already running.
 1. If necessary, click the **Tasks** button in the Navigation bar to display the Tasks folder. Click the **To-Do List** button in the Current View group on the HOME tab.
 2. Click the **New Items** drop-down arrow. The drop-down menu appears.

Step by Step: Assign a Task to Another Outlook User

3. Click **Task Request**. The Task Request window containing elements of a Task window and a Message window is displayed, as shown below.

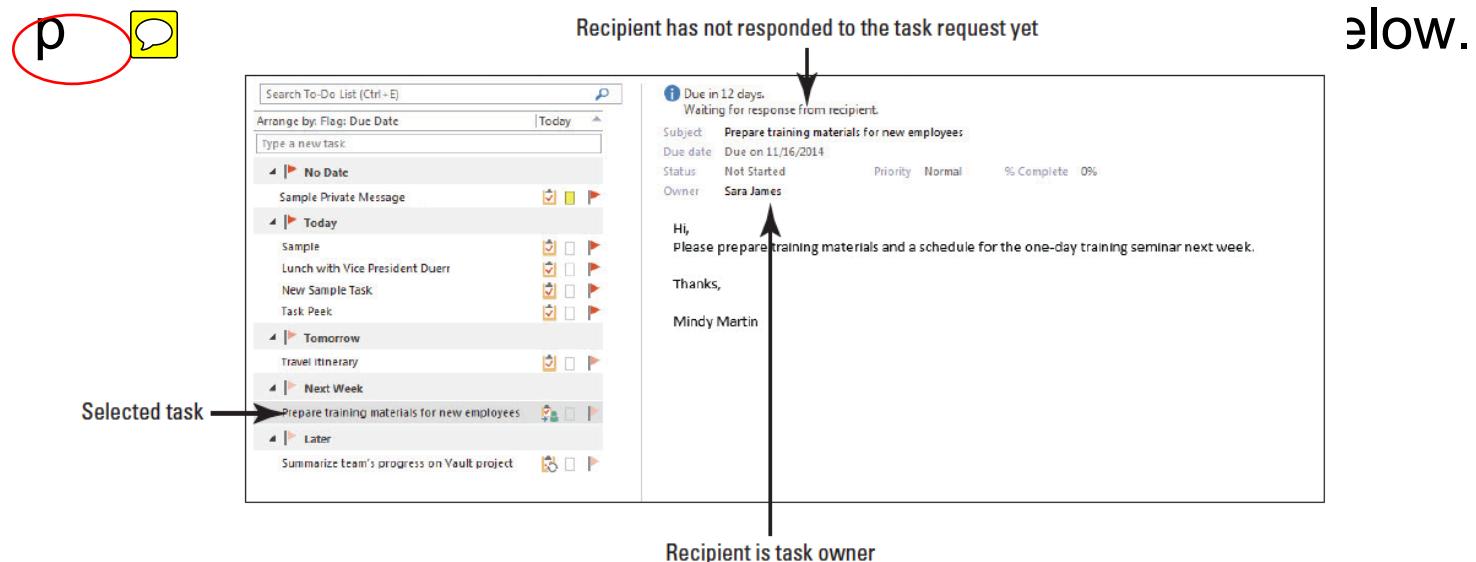


Step by Step: Assign a Task to Another Outlook User

4. Click the **To** field and key [your partner's email address]. Your partner is the Outlook 2013 user who will own this task.
5. Click the **Subject** field and key **Prepare training materials for new employees**.
6. Click the **Due date** field. Key or select **[next Friday's date]**.
7. In the message area, key the following message: **Hi,**
[Press Enter.] Please prepare training materials and a
schedule for the one-day training seminar next week.
[Press Enter twice.] Thanks, [Press Enter twice.] Key
[your name].

Step by Step: Assign a Task to Another Outlook User

8. Click the **Send** button to send the task request. If you kept a copy of the task, it is displayed on your To-Do List.
9. Click the **Prepare training materials for new employees** task on your To-Do List to verify that your



Step by Step: Assign a Task to Another Outlook User

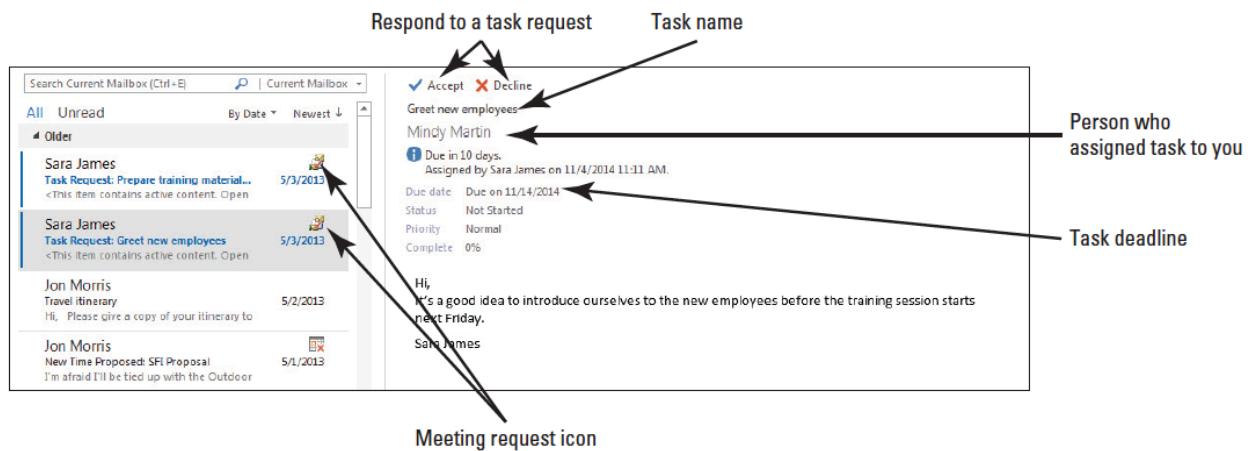
10. If necessary, click the **Tasks** button in the Navigation bar to display the Tasks folder.
11. Click the **New Items** drop-down list arrow. The drop-down menu appears.
12. Click **Task Request**.
13. Click the **To** field and key **[your partner's email address]**. Your partner is the Outlook 2013 user who will own this task.
14. Click the **Subject** field and key **Greet new employees**.

Step by Step: Assign a Task to Another Outlook User

15. Click the **Due date** field. Key or select **[next Friday's date]**.
 16. In the message area, key the following message: **Hi,**
[Press Enter] **It's a good idea to introduce ourselves to the new employees before the training session that starts next Friday.** **[Press Enter twice]** **Key [your name].**
 17. Click the **Send** button to send the task request.
- **PAUSE. CLOSE** Outlook 2013 to access your partner's account, if necessary. Otherwise, leave Outlook 2013 open to use in the next exercise.

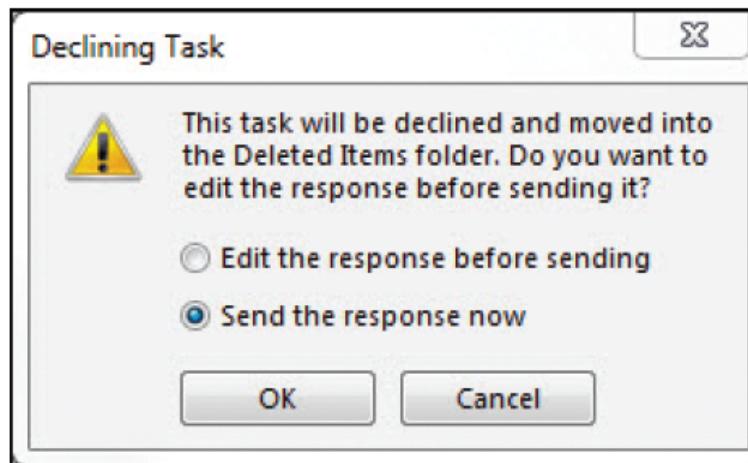
Step by Step: Accept or Decline a Task Assignment

- **GET READY. LAUNCH** Outlook 2013 if it is not already running. Complete the previous exercise.
 1. Click the **Mail** button in the Navigation Bar to display the Mail folder. If the task requests sent in the previous exercise have not arrived, click the **Send/Receive All Folders** button.
 2. In the Inbox, click the **Task Request: Greet new employees** message to preview it, as shown below.



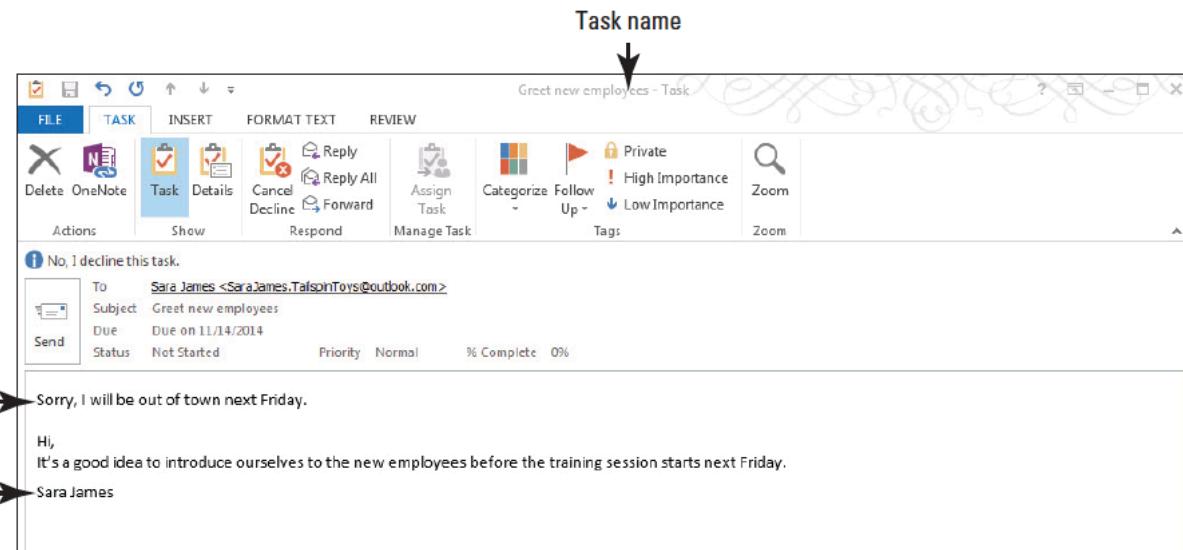
Step by Step: Accept or Decline a Task Assignment

3. In the Reading Pane, click the **Decline** button at the top of the message. As shown below, a small dialog box is displayed asking if you want to edit the message sent with the response.



Step by Step: Accept or Decline a Task Assignment

4. In the Declining Task dialog box, click the **Edit the response before sending** option and click **OK**.
5. At the top of the message area in the Task window, key **Sorry, I will be out of town next Friday.** [Press **Enter** twice.]
6. Compare your Task Request response to that shown below.

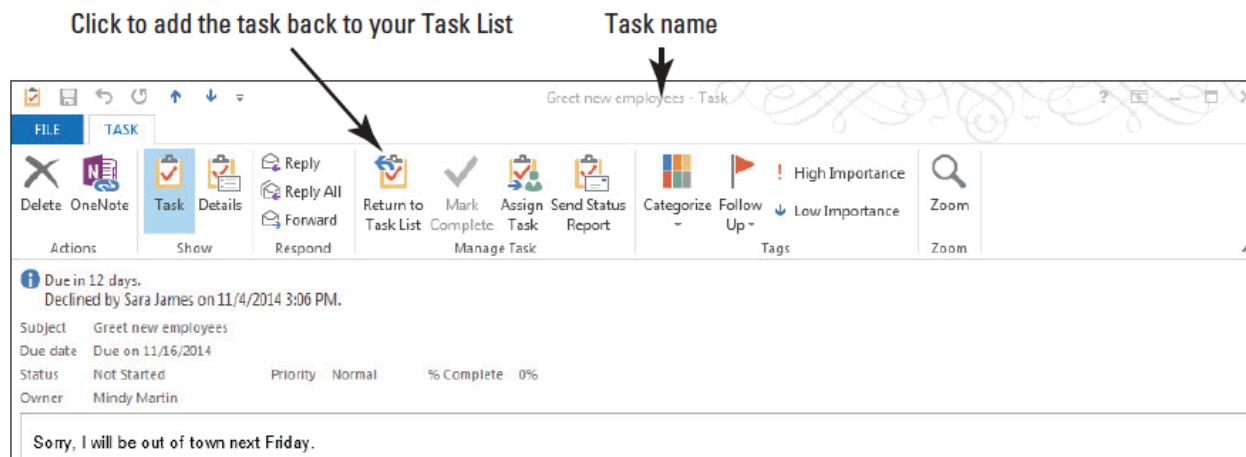


Step by Step: Accept or Decline a Task Assignment

7. Click the **Send** button. Your partner has declined this task, so it is not added to his task list. However, until **you**—the person who originally assigned it to your partner—reclaims ownership of the task, he is still the owner.
8. In the Inbox, click the **Task Request: Prepare training materials for new employees** message. The task request is previewed in the Reading Pane.
9. In the Task window, click the **Accept** button in the Respond group on the Ribbon. The small **Accepting Task** dialog box is displayed.
10. Click **OK** to send the response now. The task acceptance is sent and the task is added to your task list.

Step by Step: Accept or Decline a Task Assignment

11. Double-click the **Task Request: Greet new employees** message that your partner declined. The declined task request window opens, as shown below.
 12. Click the **Return to Task List** button in the Manage Task group. The task acceptance is sent and the task is added to your task list.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.



Step by Step: Send a Status Report

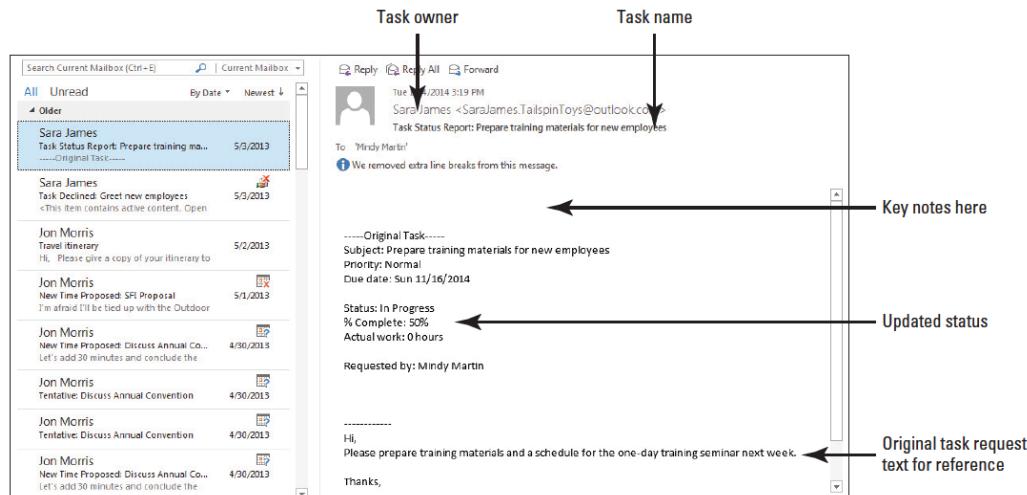
- **GET READY. LAUNCH** Outlook 2013 if it is not already running. Make sure you've completed the previous exercises.
 1. In your partner's account, click the **Tasks** button in the Navigation bar to display the Tasks folder if necessary.
 2. Double-click the **Prepare training materials for new employees** task. The Task window is displayed.
 3. Click the **% Complete** field. Key or select **50%**.
 4. Click the **Save & Close** button to update the task.

Step by Step: Send a Status Report

5. Double-click the **Prepare training materials for new employees** task. The Task window is displayed.
6. Click the **Send Status Report** button in the Manage Task group on the Ribbon. A Message window is displayed. The person who assigned the task to you is displayed in the **To** field.
7. The message content details the task's current status.
8. Click the **Send** button.

Step by Step: Send a Status Report

9. In your email account, click the **Task Status Report: Prepare training materials for new employees** message in your message list. The status report is previewed in the Reading Pane, as shown below.
- **PAUSE. CLOSE** Outlook 2013.



Skill Summary

Skills	Exam Objective	Objective Number
Creating New Tasks	Create and manage tasks	3.4.1
Working with Task Options	Set Outlook options	1.1.7
	Configure views	1.1.5
Managing and Completing a Task	Create and manage tasks	3.4.1
	Search for tasks	1.4.3
	Print tasks	1.3.6
Working with Assigned Tasks	Create and manage tasks	3.4.1
	Update task status	3.4.5