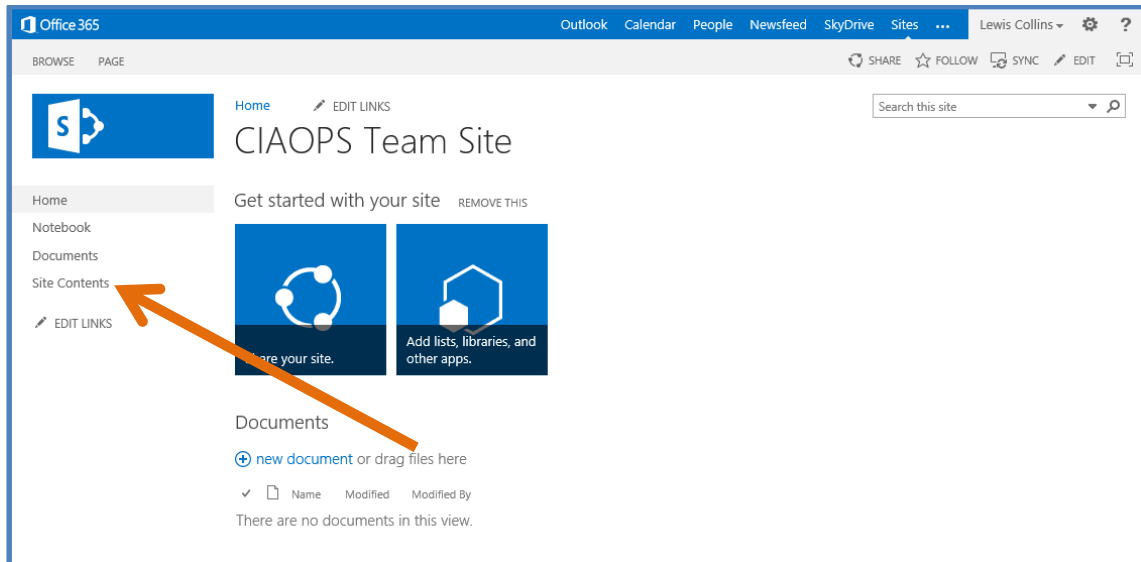
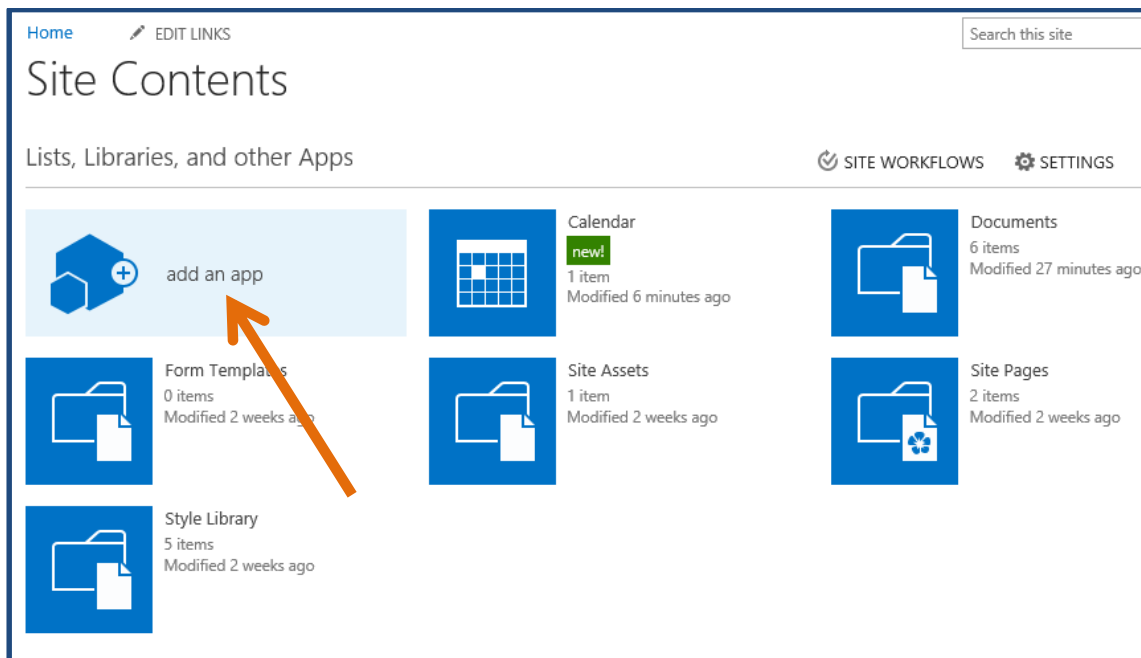


Tasks

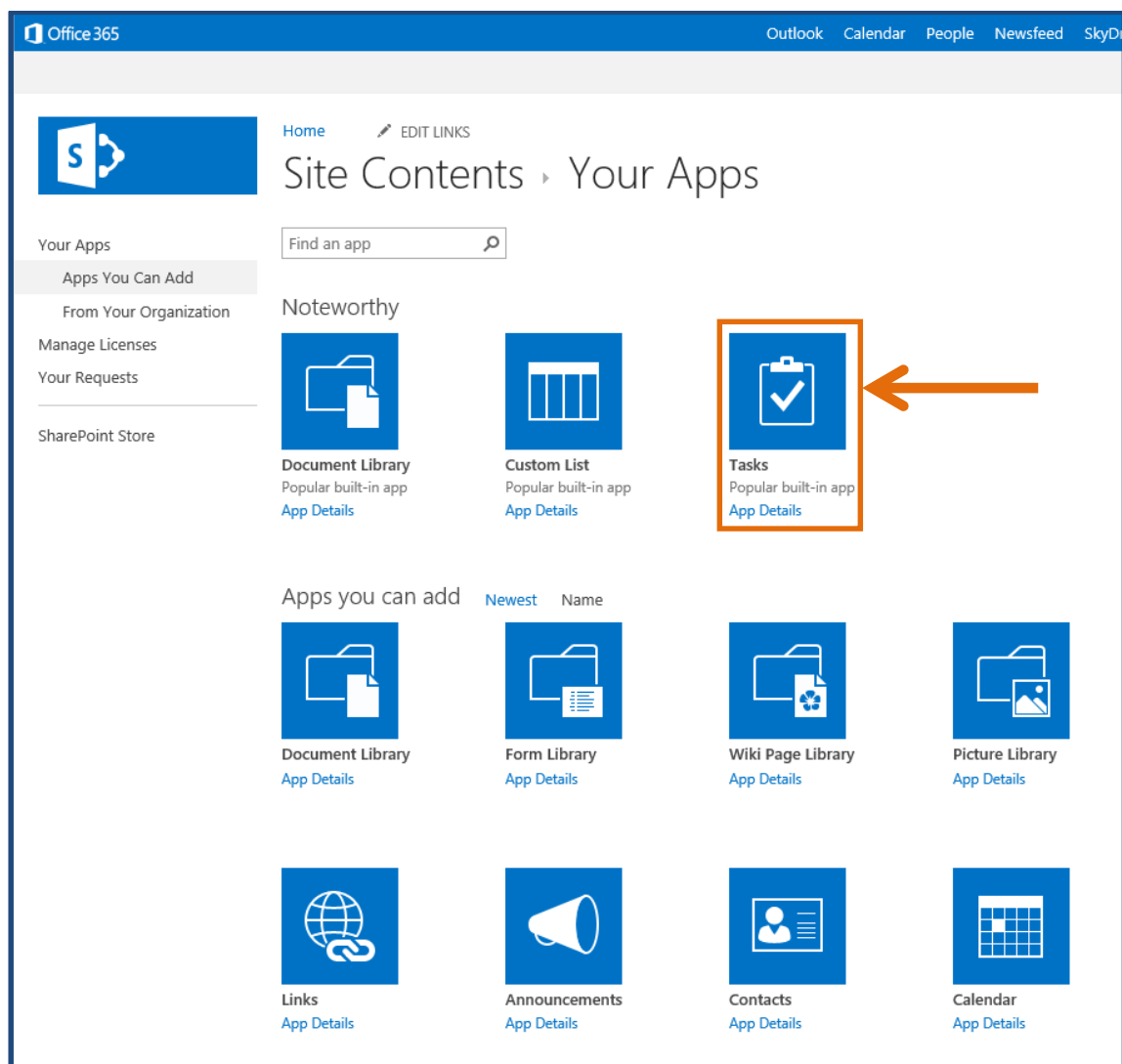
A default *Task* list does not exist with this version of the Team Site but it is easy to create one. To do that you will need to have the rights to create items in the Team Site. If you don't have these rights you will need to either have your Team Site administrator add these rights or create the *Tasks* list for you.



To create a task list select **Site Contents** on the left of the Team Site in the Quick Launch Menu.



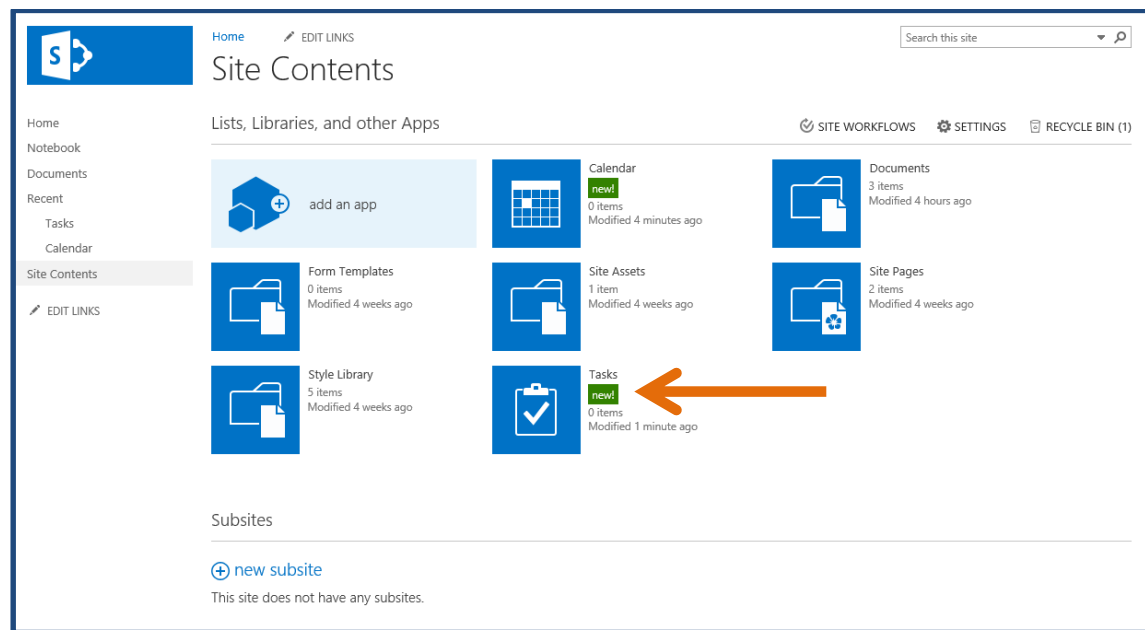
From the list that appears click on the **Add an app** icon.



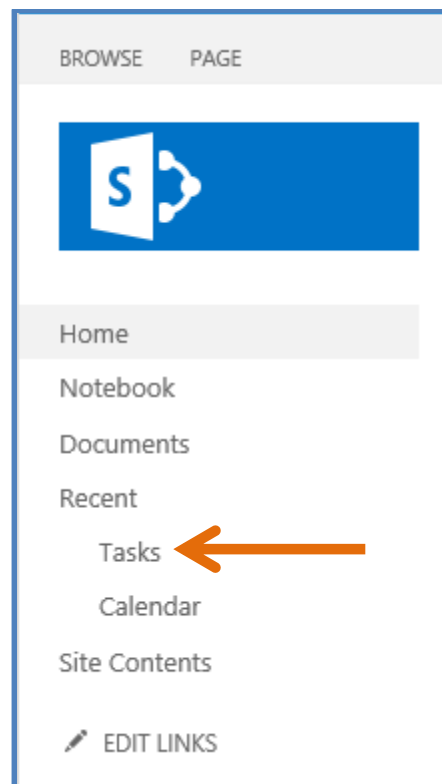
A list of SharePoint apps should then appear. Scroll through the list until you locate the *Tasks* app. Select the **Tasks** app.

The screenshot shows a dialog box titled 'Adding Tasks'. It has a close button (X) in the top right corner. The main text says 'Pick a name' and 'You can add this app multiple times to your site. Give it a unique name.' To the right of this text is a text input field labeled 'Name:'. Below the input field are two buttons: 'Create' and 'Cancel'. At the bottom left, there is a link labeled 'Advanced Options'.

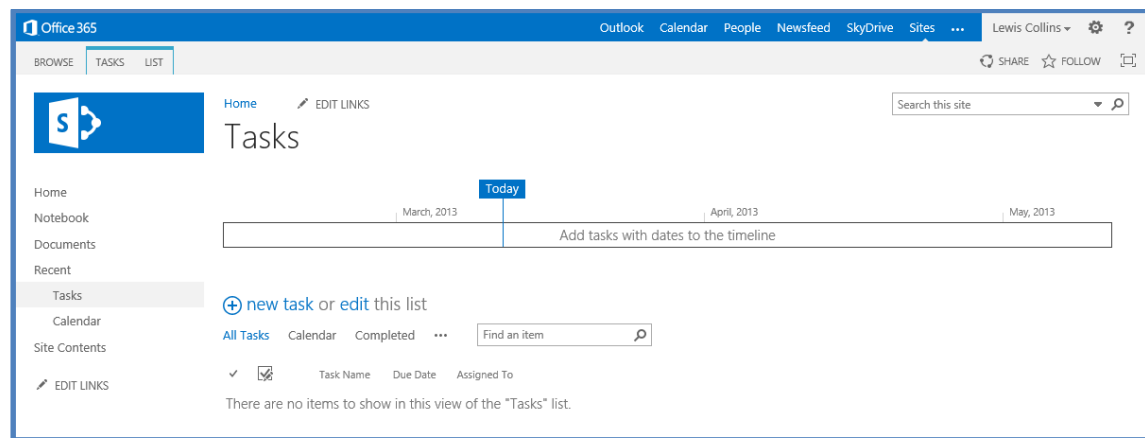
You will now be prompted to give the tasks list a name. In this case call it **Tasks** and press the **Create** button to continue.



You should now see the *Tasks* app appear in under the *Lists, Libraries and other Apps* in the centre of the page as well under *Recent* on the Quick Launch menu on the left.

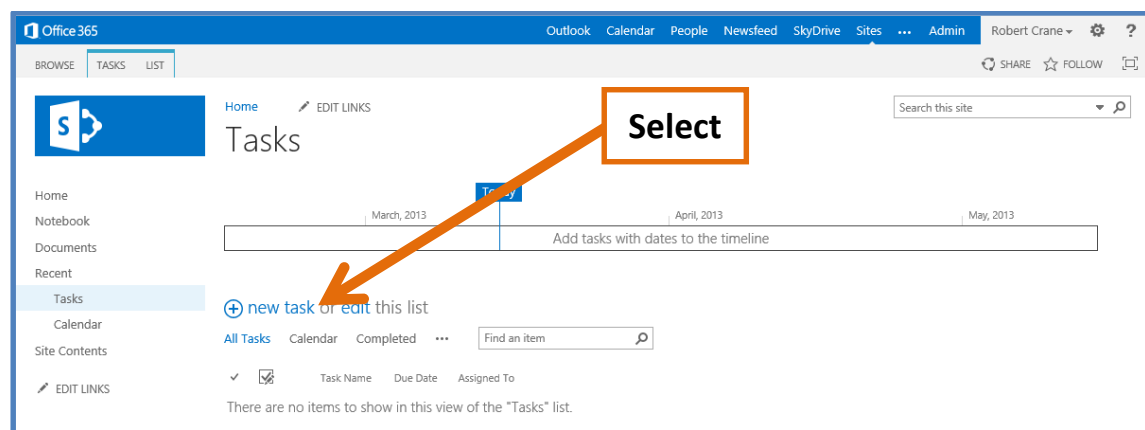


Select either of these to navigate to **Tasks** you have just created.



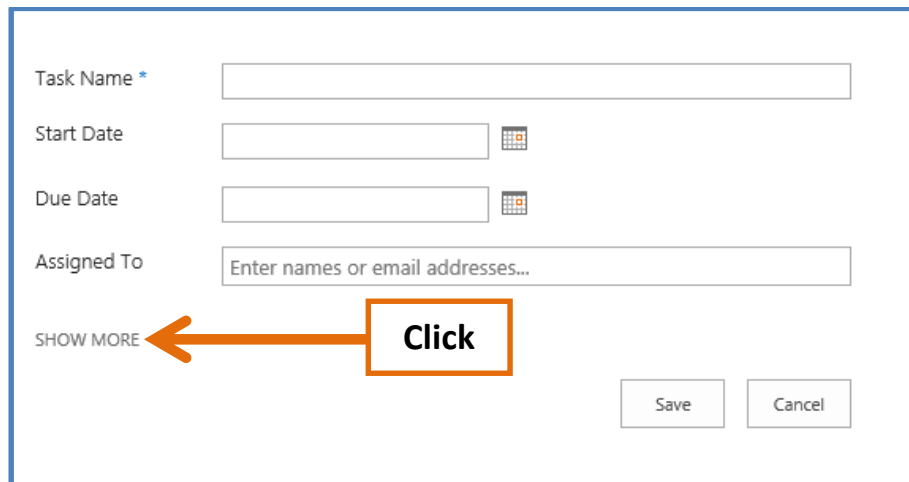
You should then see a list displayed with a time line above it as shown above.

Tasks is an area in which you can easily add information about 'to do' items that are visible to all users.





To create a new *Task* item simply press on the **new task** link above the column headings.

A new task item will now be displayed where you can enter information in about the task.




Task Name *

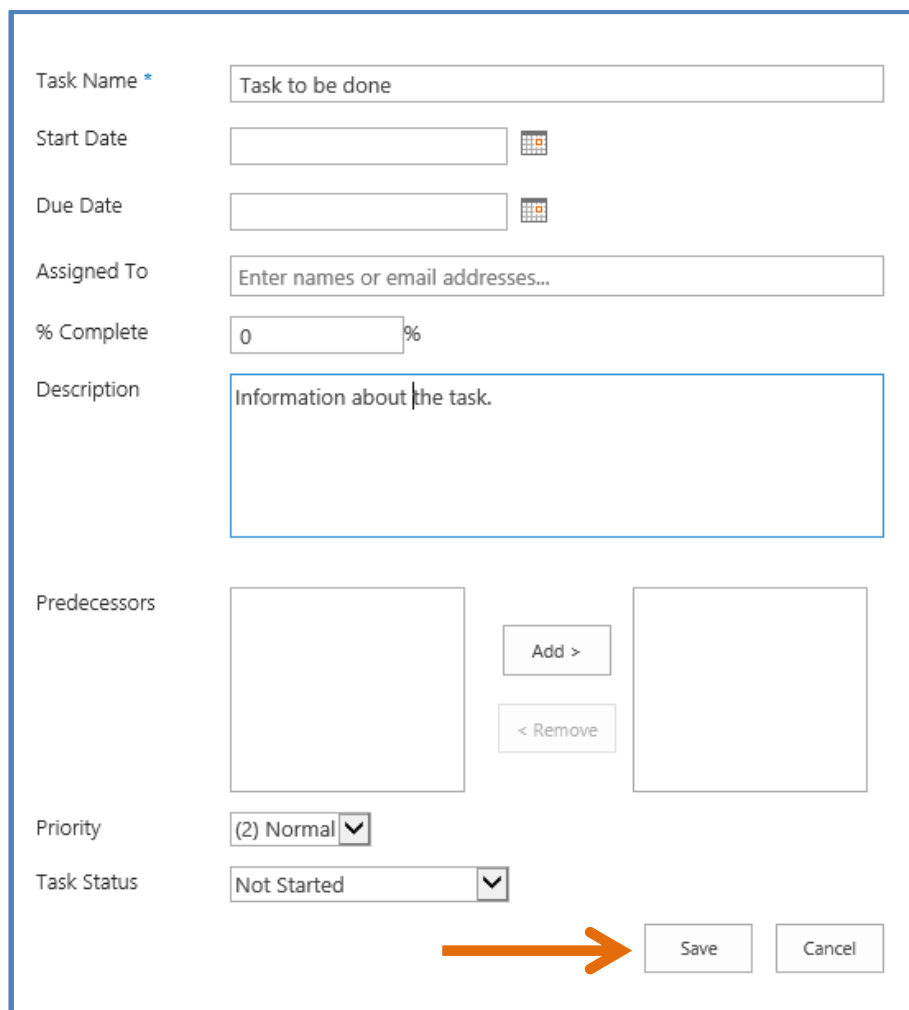
Start Date 

Due Date 


Assigned To


SHOW MORE  **Click**

Pressing the **SHOW MORE** option will reveal more fields like so:



Task Name *

Start Date 


Due Date 


Assigned To


% Complete %

Description

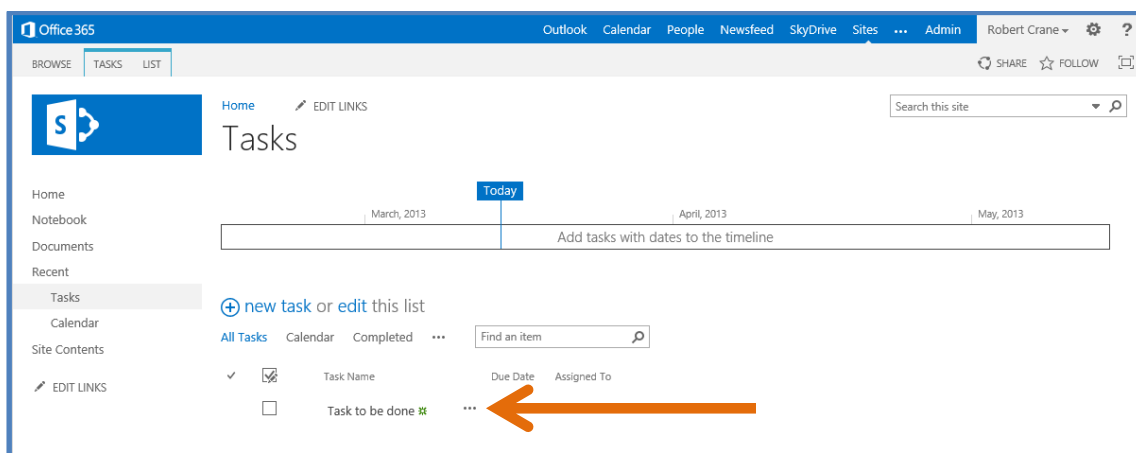
Predecessors

Priority 

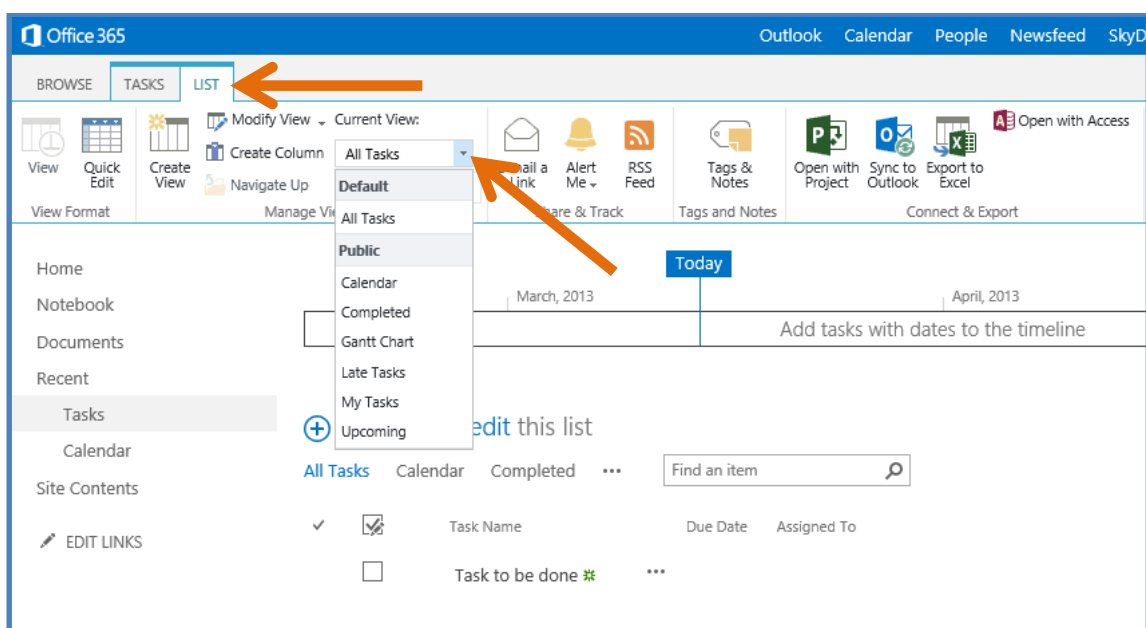
Task Status 



When you have completed entering information about the task click the **Save** button.

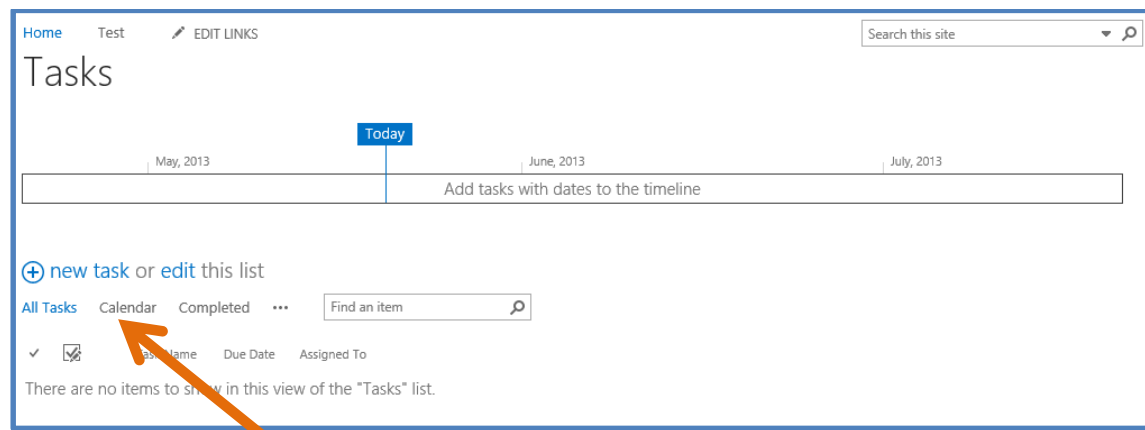


You will now see the task appear in the list. The listing appears similar to that in [Document Libraries](#).

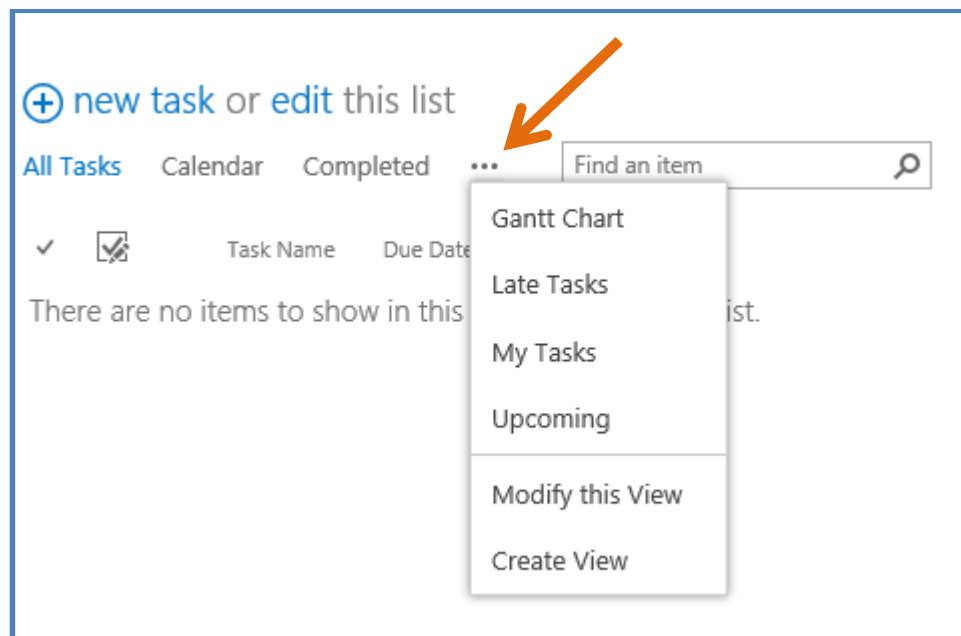


Click on the **List** tab at the top of the page to display the [Ribbon Menu](#).

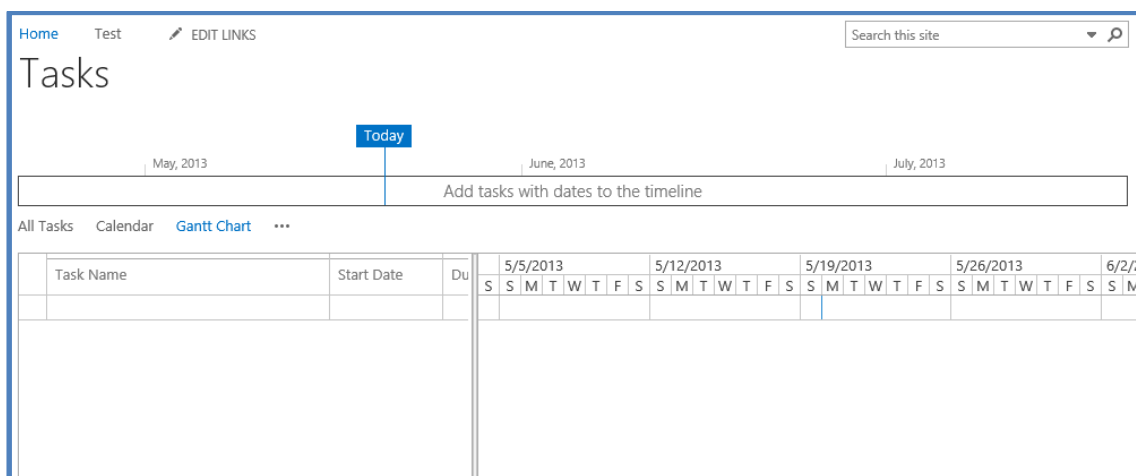
As with most elements in [SharePoint](#) it is possible to use [Views](#) to display the information in a different format. You can see all the [Views](#) available in the *Tasks* area by clicking the down arrow top the right of the *Current View* field in the *Lists* tabs.



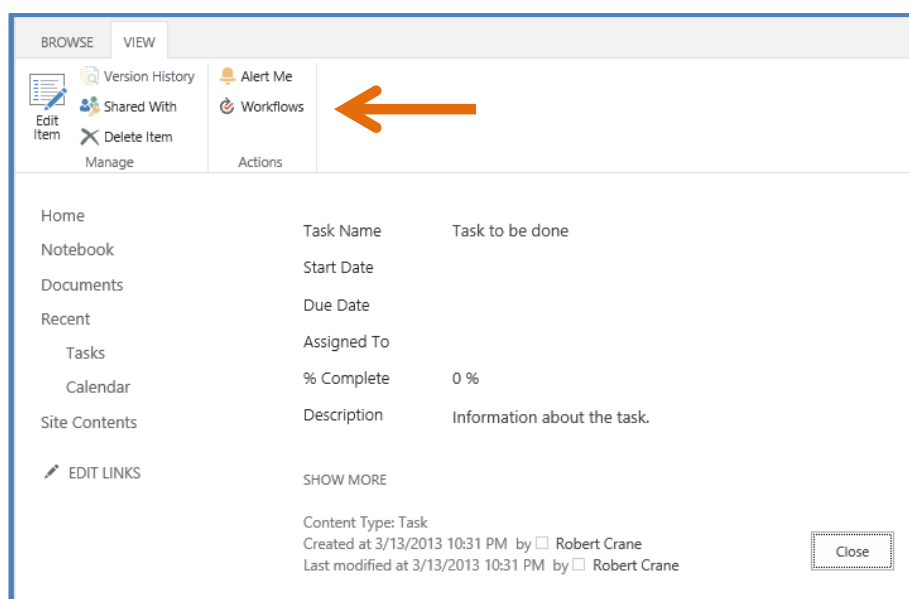
Another way to select a View is from the options just under the *new task* hyperlink.



Clicking on the **three dots (ellipse)** to the right here will reveal the remaining Views not displayed like shown above.



For example, selecting **Gantt Chart** will display a View as shown above.



If you now click on the **task item name** to display the entry you should see the above dialog.

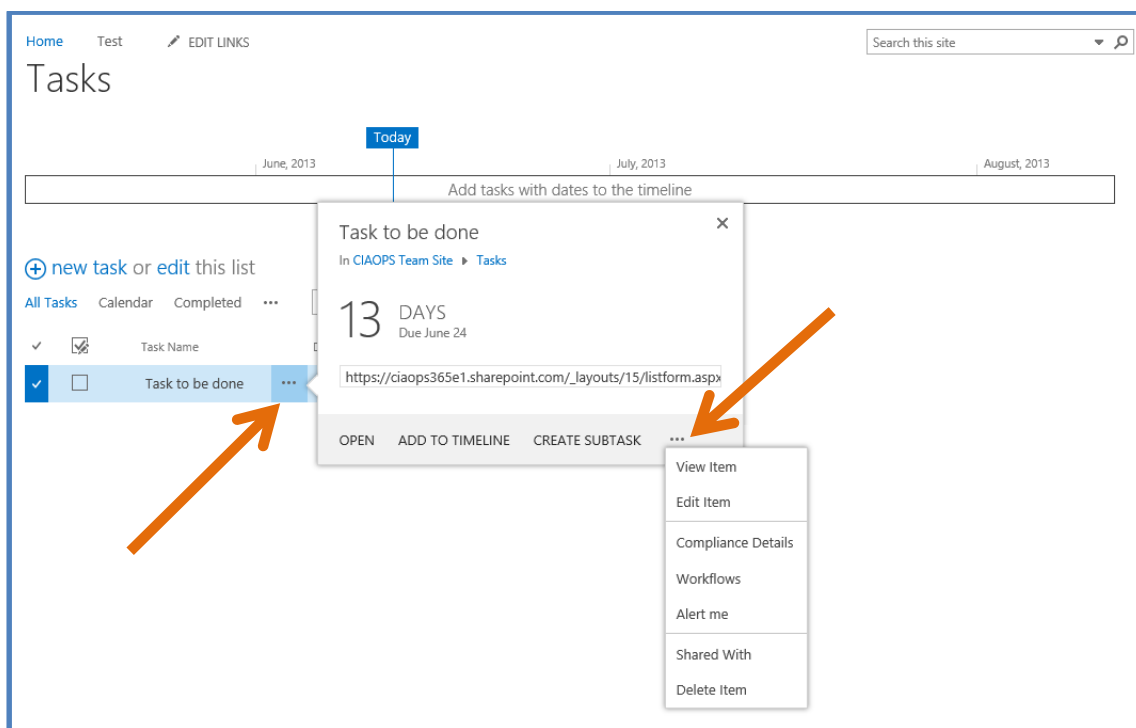
From here you can edit the task, change or add information by using the buttons on the Ribbon Menu. You can delete the item so it no longer appears in the list and you can share this item. This allows you to provide access for others to this item. Finally, you have an option to configure email Alerts for when changes occur with this item.

Most items in SharePoint have the ability to send email Alerts when information changes. These Alerts can be customized in their frequency and triggers. Alerts are configured on a per user basis to provide flexibility around what users receive Alerts about.

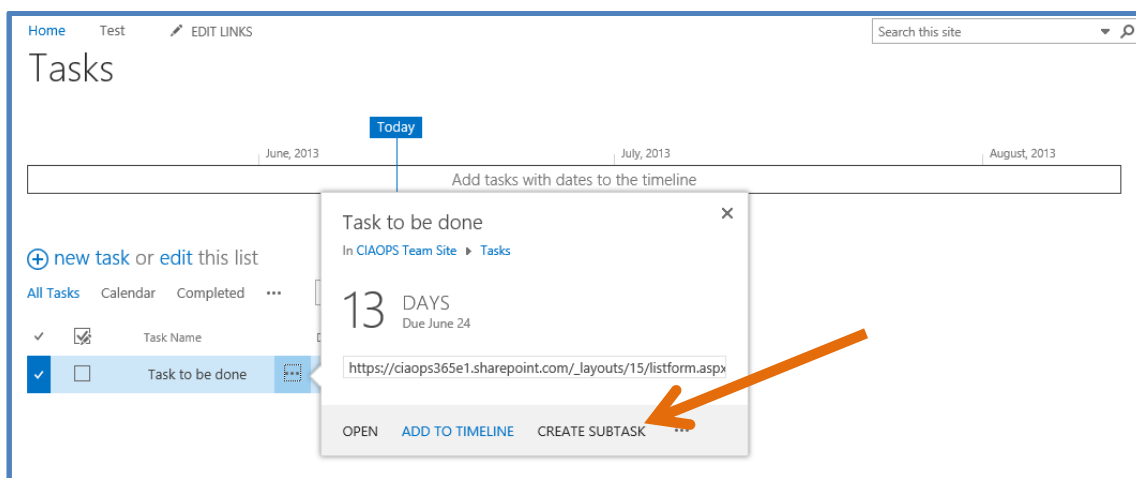
The final icon, *Workflows*, provides you the ability to create automated processes tied to this task, very much like macros in other Office products. Generally, *Workflows* require Microsoft

SharePoint Designer 2013 which is freely available from Microsoft. However, information about *Workflows* is more advanced than this book covers. If you are interested in more information about *Workflows* you are encouraged to explore the ***Where to go from here?*** section at the end of this book.

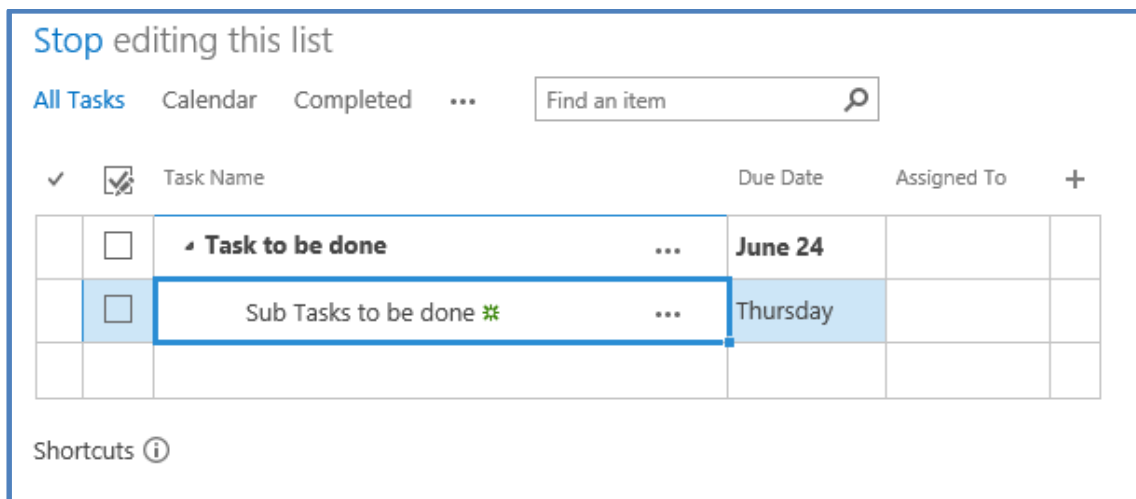
Press the **Close** button to exit the task.



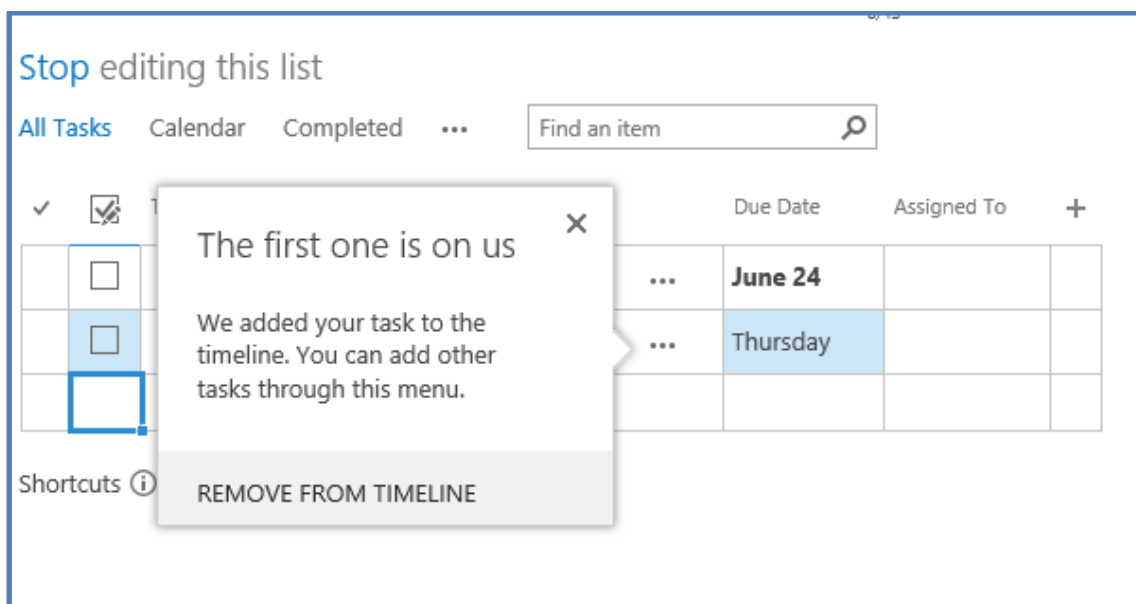
If you select the **three dots (ellipse)** to the right of the task item name you will be shown a dialog with more information about the task. If you select the **three dots (ellipse)** at the bottom right of this dialog you will see the additional menu options that are available as shown above.



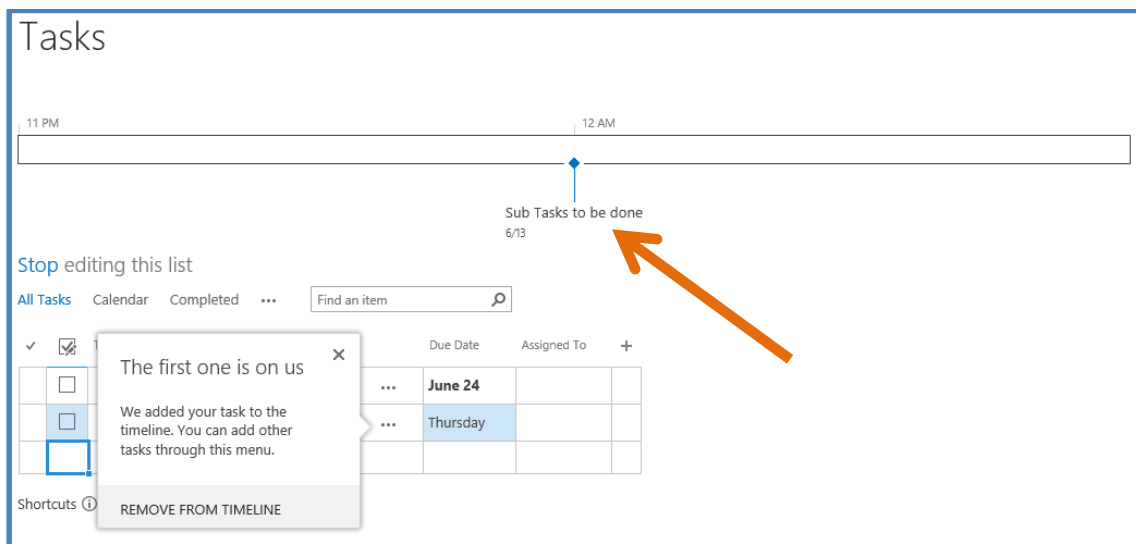
From this dialog you will also notice that there is the option to **CREATE SUBTASK**. Select this now.



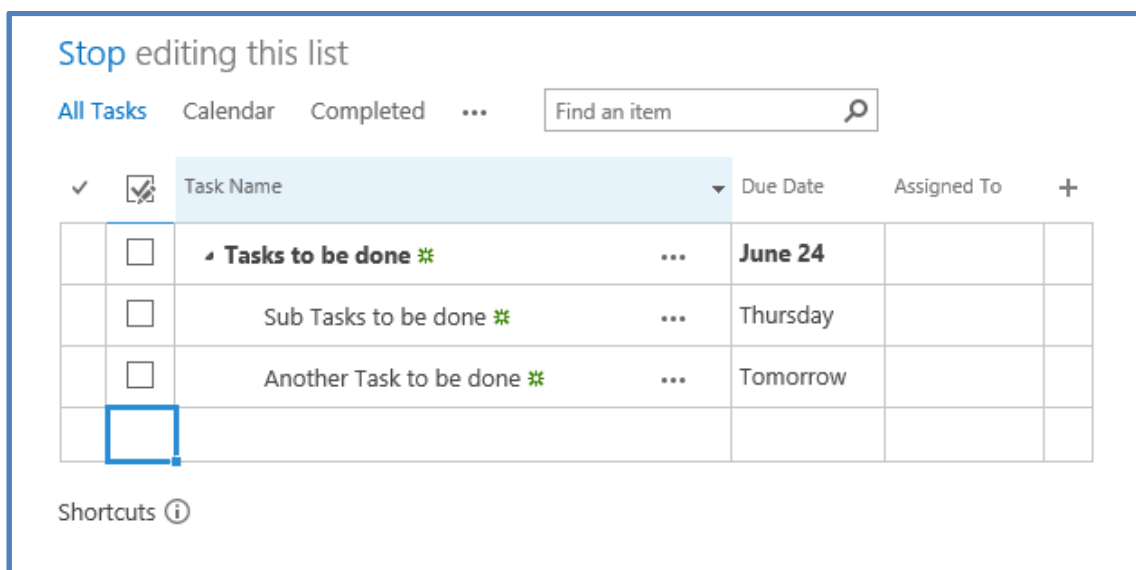
What you should then see is the *Tasks* list change to a datasheet view (i.e. basically rows and columns like for a spreadsheet), you can now easily enter the task name and the *Due Date* simply by using the *TAB* key to move between fields.



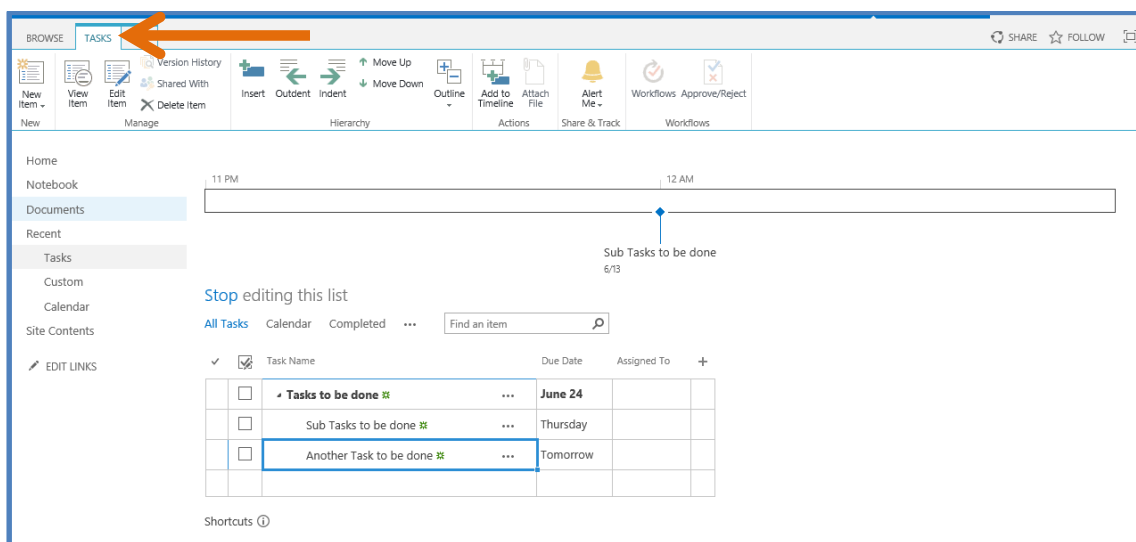
Once you complete the first subtask you will see a dialog as shown above appear. This is letting you know that the task you have just created has been added to the project *Timeline* that appears at the top of the page.



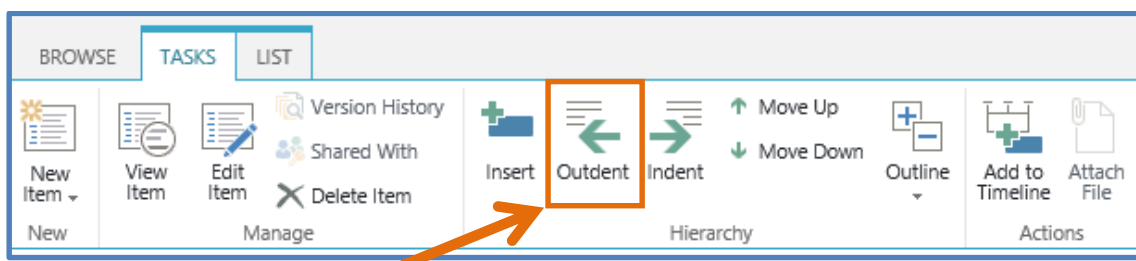
You can see the *Timeline* above the tasks list and on it the task you just created as shown above.



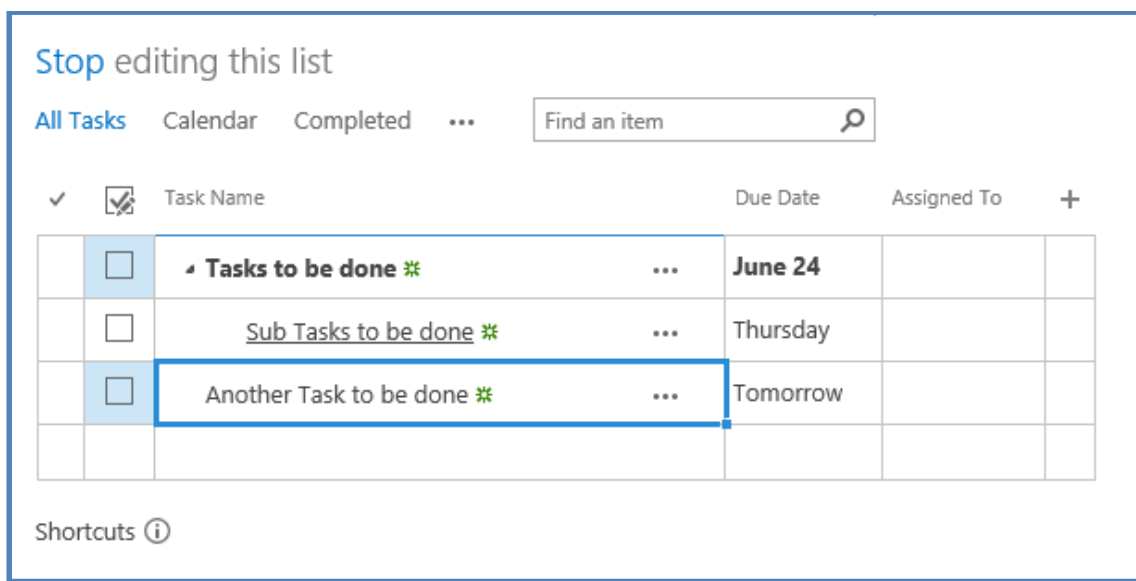
If you now continue on and create a third task, you see that it automatically creates it as a sub task. This is not what is desired in this case however it can be easily adjusted via the Ribbon Menu.



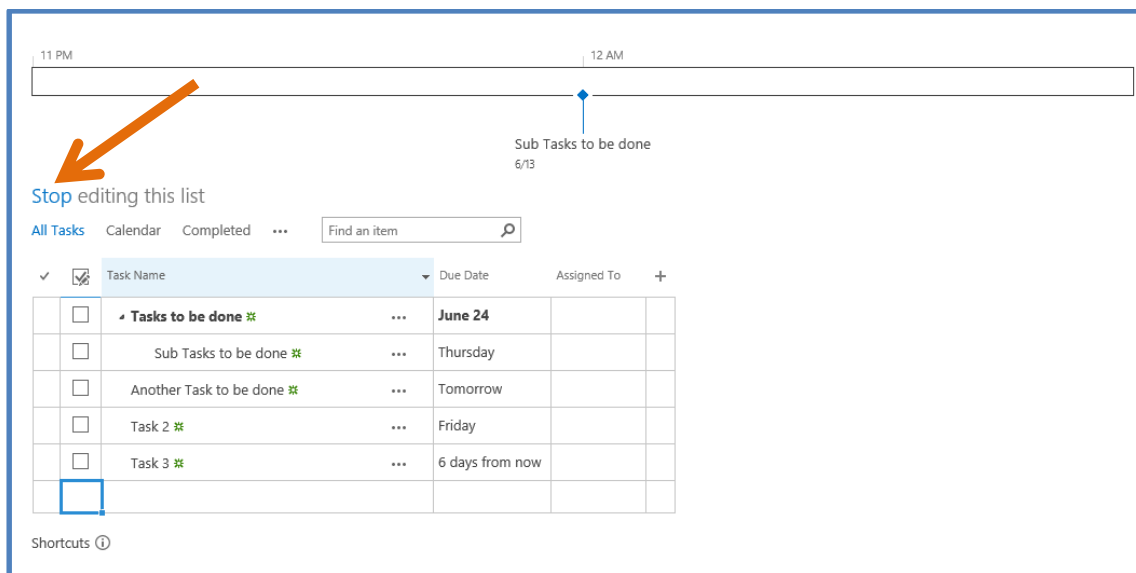
Once the new tasks has been saved, ensure the task you wish to change is active (i.e. highlighted) and select the **TASKS** tab from the top of the screen.



Here, under the *Hierarchy* section in the middle of the Ribbon Menu, you will find the **Outdent** button. Press this.

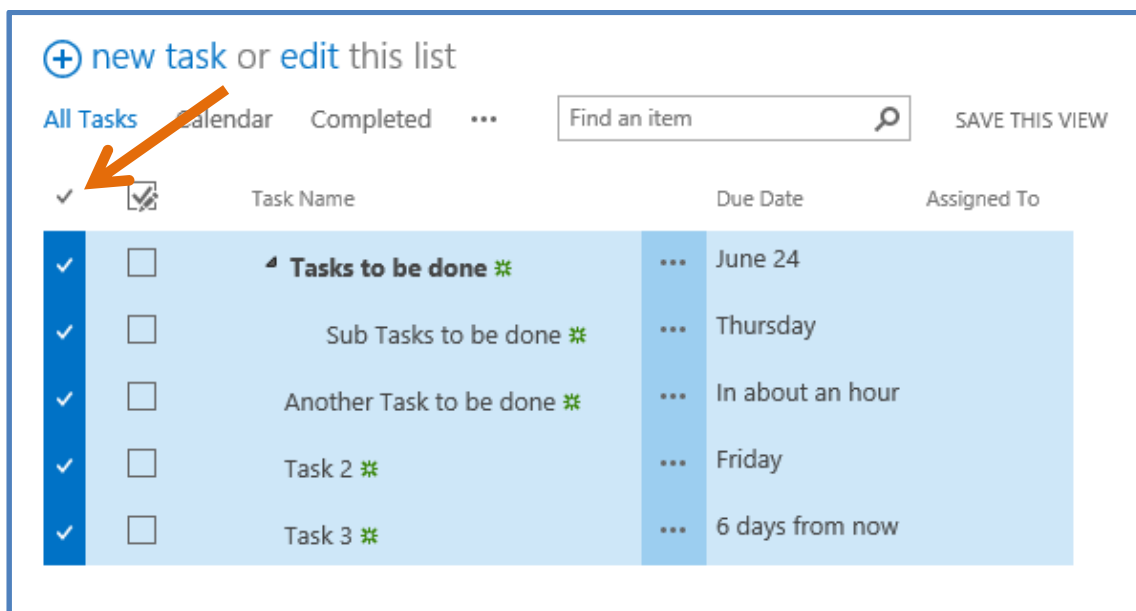


You should see the active task move to the left to be at the same level as the original task (i.e. not a sub task any more).

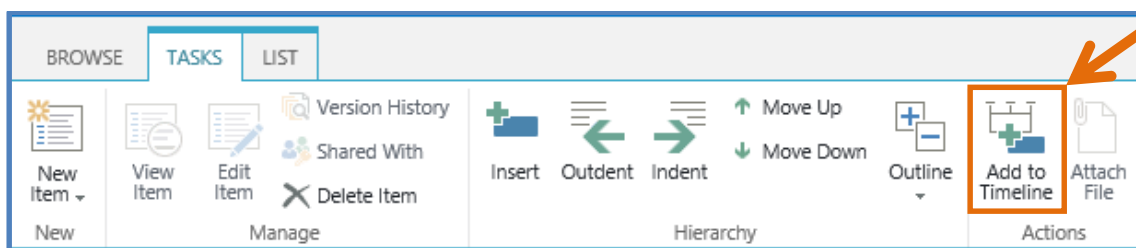


If you now add a few more tasks you will notice that they are not automatically added to the timeline at the top of the page.

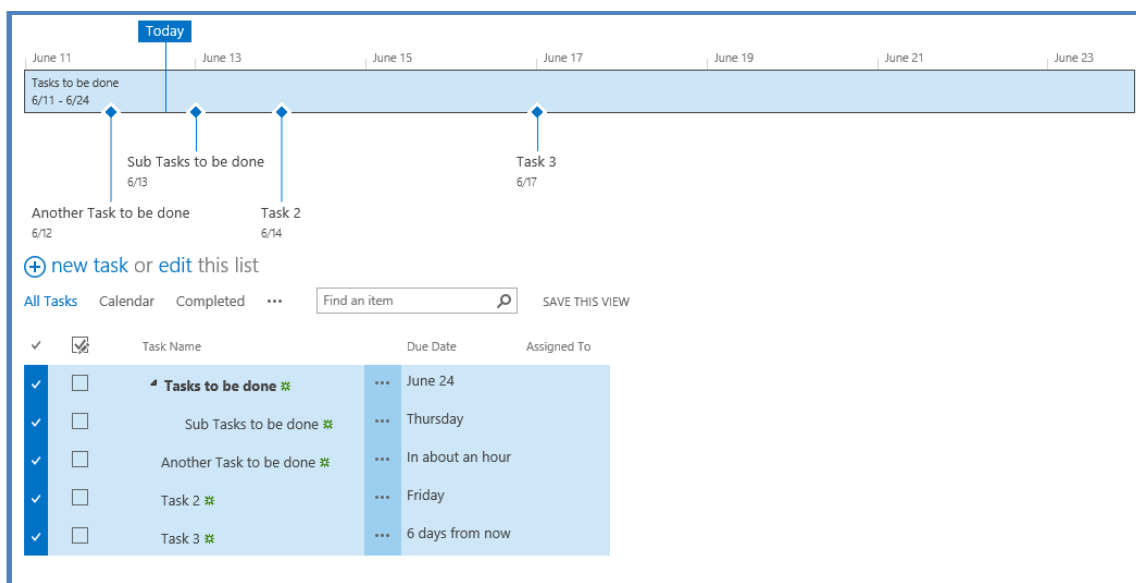
To add all these additional tasks to the *Timeline* firstly select the **Stop editing this list** hyperlink just above the list of tasks.



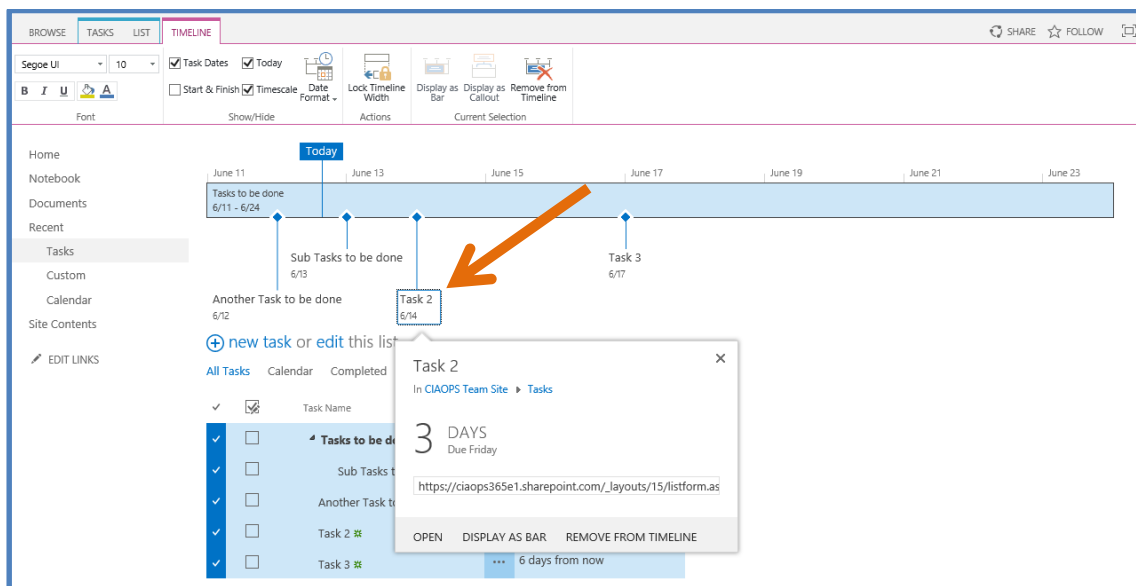
Highlight every task by selecting the check mark at the top of the very first column. When you do so, all the task items should be selected as shown above.



The Tasks Ribbon Menu should still be open. From here select the **Add to Timeline** button on the right.

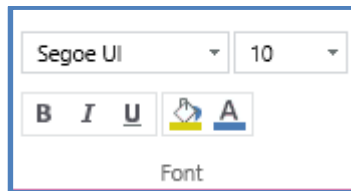


Now you should see all the tasks appear on the *Timeline* at the top of the page as shown above.

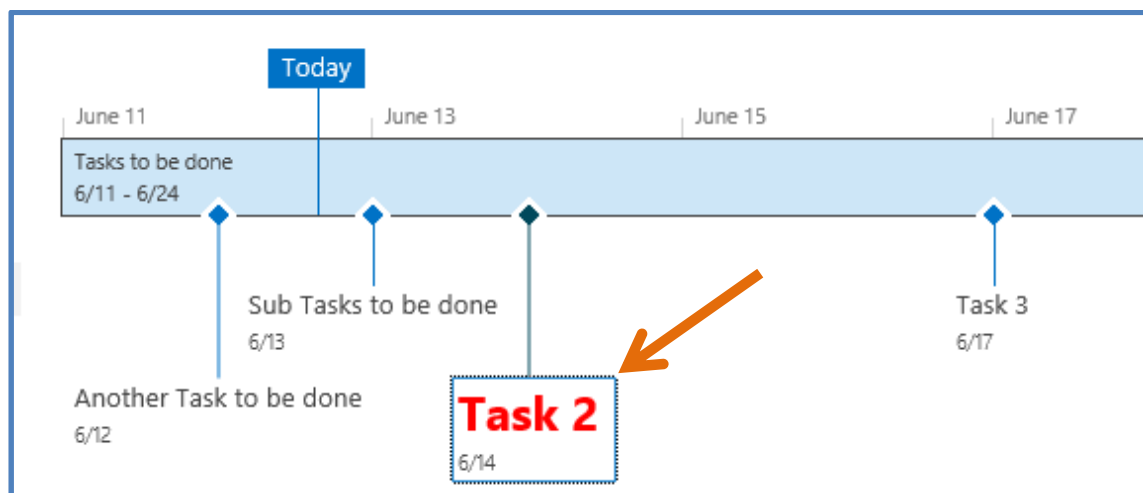


If you now **click** on a task from the *Timeline* you will see that a dialog displays with more information about that task. This is very similar to what appears when you select the *ellipse* (three dots) next to the task in the list below.

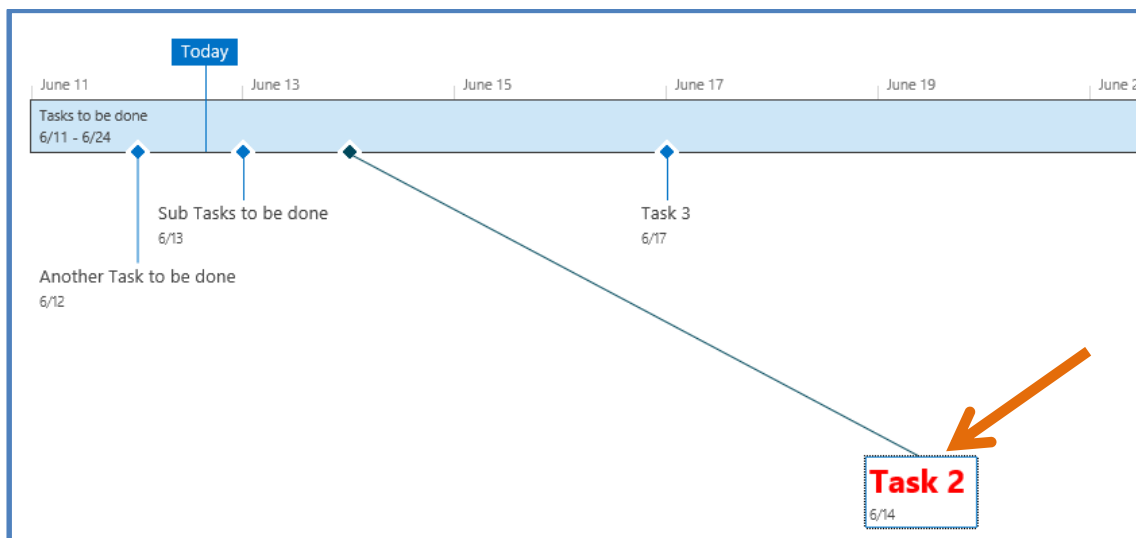
You will also notice that the Ribbon Menu changes to now include a *TIMELINE* tab. On the left hand side of this ribbon you will notice a number of formatting options under the *Font* heading.



Using these options you can change how that item is displayed on the *Timeline* like so:

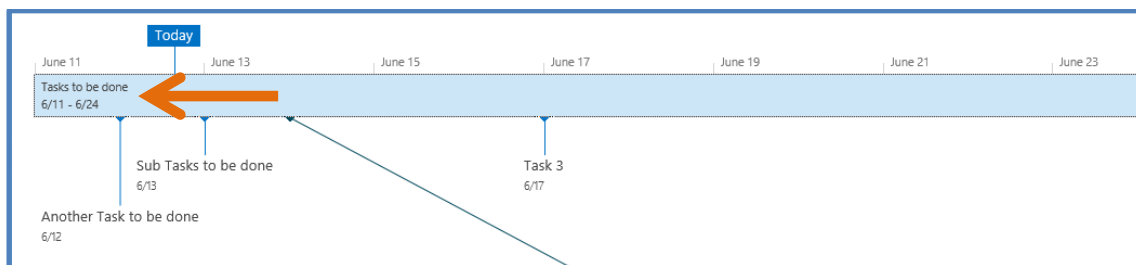


By simply selecting each element and then editing its appearance from the Ribbon Menu, you are able to change the way that it appears on the *Timeline*, which allows you to easily highlight the important items in any project.

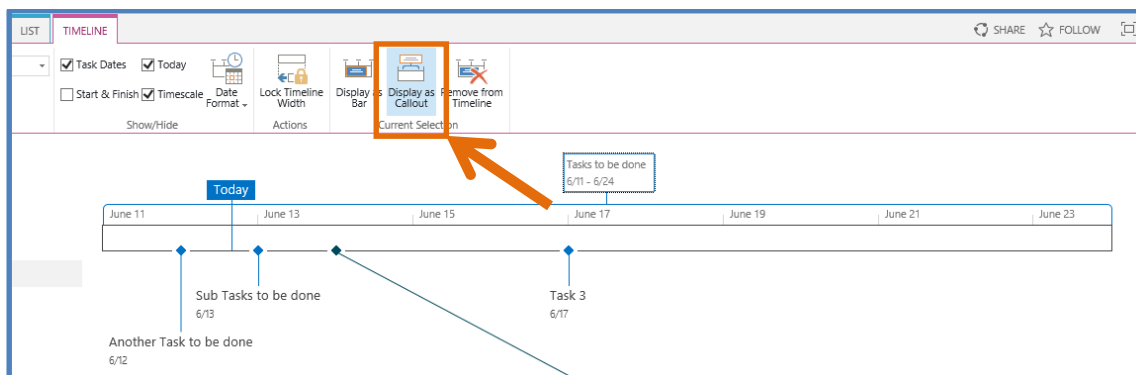


You can also reposition an item on the *Timeline* simply by dragging and dropping it to a new location on the page. In the above case, *Task 2* has been dragged to the lower right. Immediately after doing that the *Task* list below is moved down the page to make space for this item.

This means that you can position items on the *Timeline* in a way that makes them easy to view, which is especially handy in the case where there are lots of items.

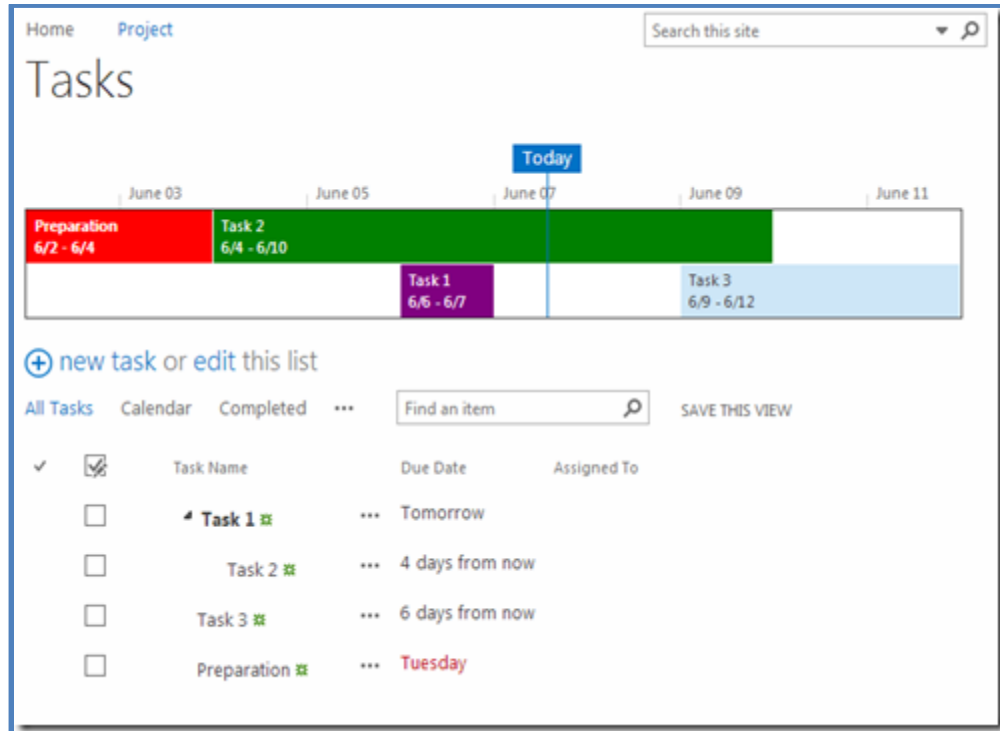


What you may not also appreciate about the *Timeline* is that it can display tasks both as bars and as callouts. In the above example, because the item *Tasks to be done* has a start and finish date it is actually displayed as a bar across the whole date range.



To change this item to a callout simply select it in the *Timeline* and then press the **Display as Callout** button from the Ribbon Menu. You should see the item change to something like that displayed above, which basically has the task listed above the *Timeline*.

You can easily swap items from callouts to bars by simply selecting the item and then using the appropriate button from the Ribbon Menu.



All these customizations provide you with a lot of flexibility to manage projects the way that you want to. Having the ability to easily colour code tasks, as shown above, makes highlighting items easy.

As expected, it is possible to link these task items with those in Outlook.

Glossary

Alerts – Are settings that can be made to most components of SharePoint that will send an email to inform of changes in information. They can be customized in respect to what triggers the sending (change, delete, addition, etc) as well as the frequency (immediate, daily, weekly, etc). They are configured by each individual SharePoint user normally at the location they wish to monitor.

Document Library – Are storage locations in SharePoint specifically designed to manage any sort of document (Word, Excel, PDF, etc). Once here, documents can easily be sorted and displayed. It is also possible to configure check in/check out as well as document approval to give better document management than what is normally provided in folders on the local computer.

Office 365 – Is hosted versions of Microsoft Exchange, SharePoint and Lync. They can be purchased as a suite or individually. All of the servers live in Microsoft data centers but can be accessed anywhere an Internet connection is available.

Office Web Apps - is an add-on component to SharePoint that allows Office documents to be displayed and edited in a web browser. Office Web Apps is part of Office 365 by default.

Picture Library – Are similar to Document Libraries but they are specifically designed for the management of images (JPG, BMP, TIFF, etc). They share many features with Document Libraries including the ability to check in/check out document as well as document approval. Importantly, Picture Libraries allow additional descriptive information to make locating images much simpler.

Quick Launch Menu - Is the list of links that normally appear down the left hand side of most pages in a SharePoint site. Clicking on any of these links will take you directly to that location in the SharePoint site.

Recycle Bin – An area into which most items that are deleted go upon deletion. This allows them to be easily recovered if needed. Beware that the contents of the Recycle Bin are not retained indefinitely.

Ribbon Menu – Much like the ribbon that is evident in Office 2010 and 2013 products SharePoint 2013 will now display a ribbon menu to provide you with a greater range of options. The ribbon menu is context sensitive only showing you the options that are available depending on where you are located in SharePoint 2013.

SharePoint – Is the Microsoft technology on which the Office 365 Team Site is based. It is a web front end onto a database in its simplest form. It is accessed via a standard web browser but provides much greater functionality when viewed with Internet Explorer. SharePoint can be used to manage a variety of information sources from documents to ad hoc lists with everything inside it being fully indexed for search ability.

SharePoint Online – Is the hosted version of SharePoint Server 2010 provided by Microsoft via Office 365.

Site Collections – are logical containers for a top level site and child sites below it. It has unique security, sharing, features, galleries, solutions and storage options. Site Collections are created and managed via the SharePoint Admin center in Office 365. Each Site Collection must be assigned a Primary Site Collection Administrator and optional Secondary Administrators.

Views – Are different ways to display the same data. You are able to have a number of different Views of the same data between which you can easily select. Views can also be used to aggregate data within a list such as summing up values in a column, averaging values, or other aggregation functions.

About

Author - Robert Crane BE MBA MCP

Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 20 years of IT experience in a variety of fields and positions, including working on Wall St in New York. Since 2012 he was recognized with a Microsoft Most Valuable Professional (MVP) Award for his work with Office 365. He continues his involvement with information technology as the Principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars as well as write on a number of topics for the Computer Information Agency including being involved in the SMBITPro community in Sydney. Robert can be contacted via director@ciaops.com.

Company – Computer Information Agency (www.ciaops.com)

Founded in 1995, the Computer Information Agency is a specialized technology consultancy in Sydney, Australia that focuses on assisting businesses and individuals improve their productivity using technology and smart business practices. The Computer Information Agency has high levels of experience in technologies such as Windows Servers, including Small Business Server, and desktop applications such as Outlook, Word, Excel and OneNote.

With special emphasis placed on the business benefits of technology the Computer Information Agency is unique in its ability to work with companies to improve and streamline their processes utilizing the technology they already have in place. The focus is on providing an improved end result for the business which in the long run leads to greater productivity and profitability. More information about the Computer Information Agency can be found at <http://www.ciaops.com>.