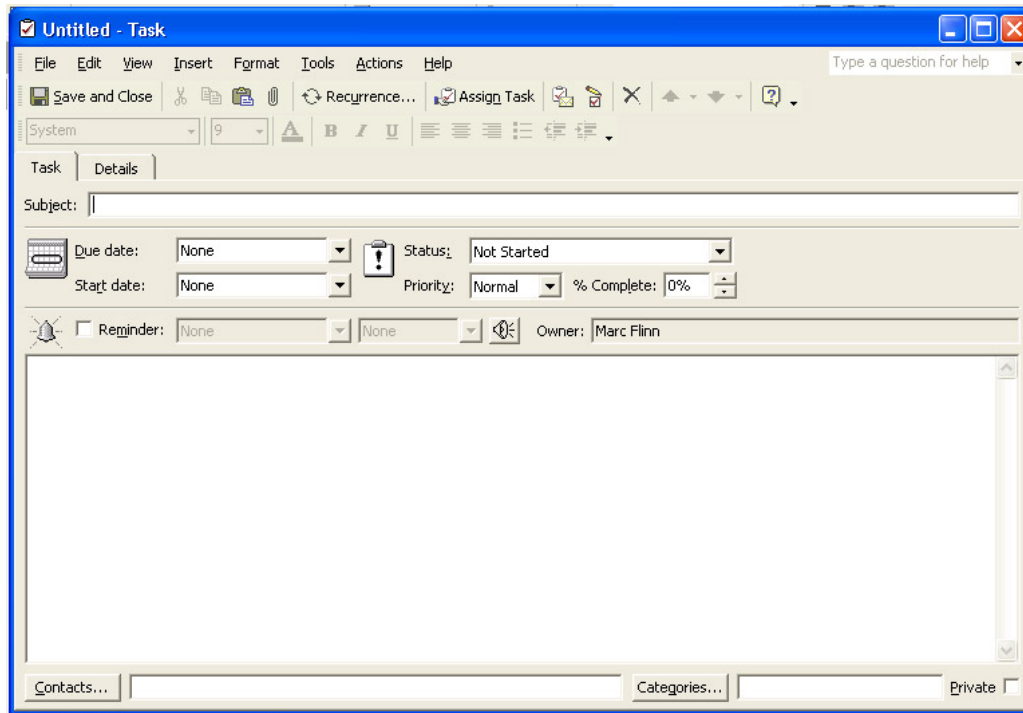


# Creating and Managing Tasks



## About tasks and task assignments

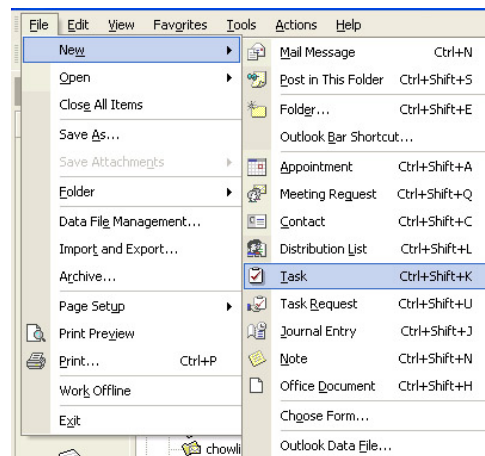
A task is a personal or work-related errand you want to track through completion. A task can occur once or repeatedly. A recurring task can repeat at regular intervals or repeat based on the date you mark the task complete. For example, you might want to send a status report to your manager on the last Friday of every month, and get a haircut when one month has passed since your last haircut.

## Create a task

Do one of the following:

Create a task from scratch:

1. On the **File** menu, point to **New**, and then click **Task**.
2. In the **Subject** box, type a *task\_ name*.
3. Complete any other boxes on the **Task** and **Details** tabs for information you want to record for the task. For help on an option, on the **Help** menu, click **What's This**, and then click the option.

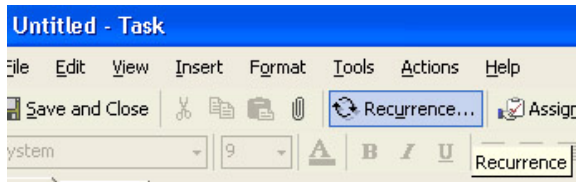


4. Set the due date and start date for a task:
  1. Open the task you want to set the start and end dates for.
  2. In the Due date box, enter the date the task needs to be complete.
  3. In the Start date box, enter a date to start work on the task.
  4. To reset the start date without changing the due date, enter None in the Start date box, and then press **ENTER**. Click in the Start date box again, and then enter the new start date.

### Note

If you set the due date to a day of the week that is outside the normal recurrence pattern for the task (for example, the date you set falls on a Wednesday, and the task normally repeats every Tuesday), you will see a new task in the task list for this one-time exception. The new task won't repeat, but the original task will continue to repeat as set.

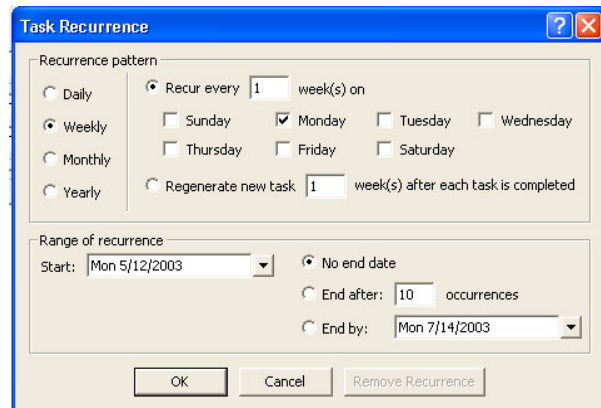
5. To make the task recur, click **Recurrence**, click the frequency (**Daily**, **Weekly**, **Monthly**, **Yearly**) at which you want the task to recur, and then do one of the following:



- Make the task recur at regular intervals:

Select options for that frequency. Do not click **Regenerate new task**, or the task will not recur at regular intervals.

- Make the task recur based on completion date:



Click **Regenerate new task**, and then type a time frequency in the box.

6. If you want, set start and end dates for the task.
7. Click **OK**, and then click **Save and Close**.

## Mark a task complete

1. Open the task you want to mark complete.
2. In the % Complete box, enter 100%.

### Note

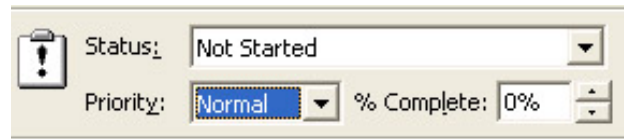
If the Complete field appears in the task list (as a check mark in the column heading), you can select the check box for the task to mark it complete. Or, if the Status field appears in the task list, you can click Completed in the list.

## Make a task private

1. Open the task you want to make visible only to yourself.
2. Select the Private check box in the lower-right corner.

## Prioritize tasks

If you want to sort task in priority order, you first need to specify a priority level for each one. By default, tasks have a Normal priority level; however, you can change this level to Low or High.

A screenshot of a task control panel. It features a clipboard icon with an exclamation mark on the left. To its right, there are three fields: 'Status:' with a dropdown menu showing 'Not Started', 'Priority:' with a dropdown menu showing 'Normal', and '% Complete:' with a numeric input field showing '0%' and a small spinner control to its right.

1. Open the task you want to change the priority level for.
2. In the Priority box, click a priority level.
3. When you're done assigning priority levels, return to the task list, and then sort it by priority using the first procedure in this topic.

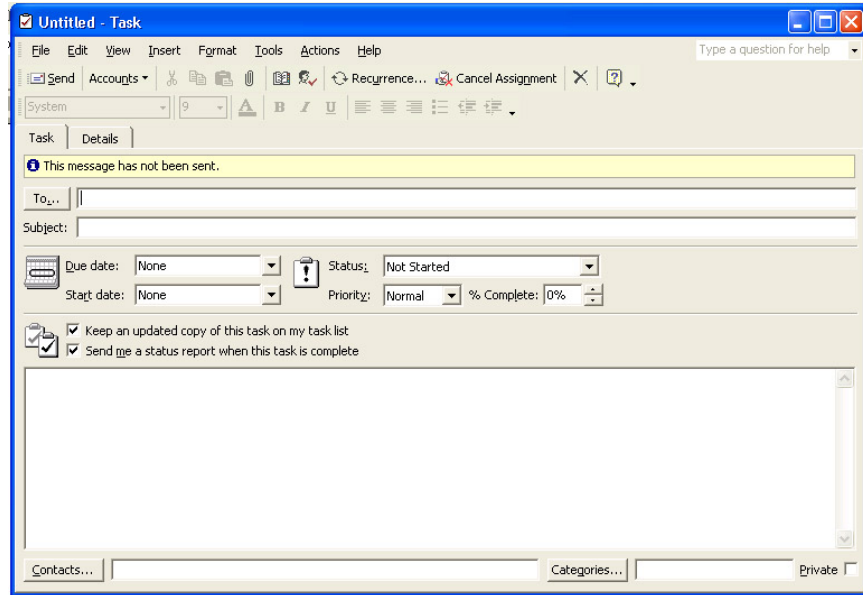
## Assign a task to someone else

In addition to creating your own tasks, you can create tasks that you assign to others. You do this by sending a *task request* to someone. The person who receives the task request becomes the temporary owner of the task. They can decline the task, accept the task, or assign the task to someone else. If they decline the task, it's returned to you. (You still have to reclaim ownership by returning the task to your *task list*.) If they accept the task, they become the permanent owner. If they assign the task to someone else, the new assignee becomes the owner.

The owner is the only one who can make changes to the task. When an owner updates a task, Microsoft Outlook updates all copies of that task — the copy for the person who originally sent the task request and copies for any prior owners of that task. When the owner completes the task, Outlook automatically sends a status report to the person who originally assigned the task, any other prior owners, and anyone else who requested a report.

If you assign a task to more than one person at a time, you cannot keep an updated copy of the task in your task list. To assign the same project to more than one person and have

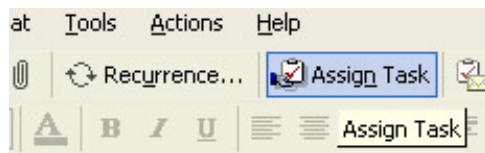
Outlook keep you up to date on work progress, divide the work into separate tasks, and then assign each one individually. For example, to assign a report to three writers, create three tasks named Write Report: Writer 1, Write Report: Writer 2, and Write Report: Writer 3.



To assign a Task; do one of the following:

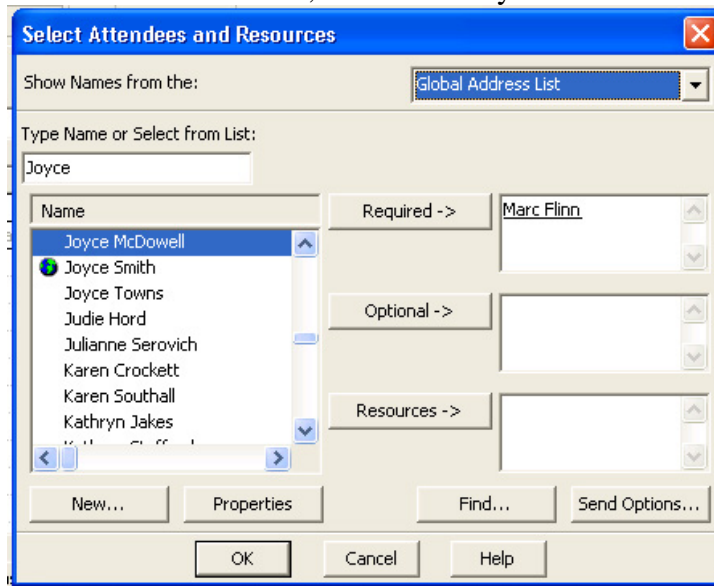
Assign a task for the first time:

1. To create a new *task*, on the **File** menu, point to **New**, and then click **Task Request**. To assign an existing task, in the *task list*, open the task you want to assign, and click **Assign Task**.
2. In the **To** box, enter the name of the person you want to assign the task to. To select the name from a list, click the **To** button.



**Note:** You need to select the name from

the *Global Address List*, and not from your Contact List.



3. For a new task, in the **Subject** box, type a task name. (In an existing task, the **Subject** box is already filled in.)
4. Select the due date and status options you want.
5. Select or clear the **Keep an updated copy of this task on my task list** check box and the **Send me a status report when this task is complete** check box.
6. If you want the task to repeat, click the **Actions** menu, click **Recurrence**, select the options you want, and then click **OK**. For Help on an option, click the question mark, and then click the option.
7. In the body of the task, type instructions or information about the task.
8. Click **Send** .

**Note** If you assign a *recurring* task, a copy of the task will remain in your task list, but it won't be updated. If you selected the **Send me a status report when this task is complete** check box, you will receive a status report for each completed occurrence of the task.