Create a New Task

Step 1.  
*Launch Microsoft Outlook on the Desktop*

Step 2.  
*Click the Tasks icon on the Outlook Bar (or Folder List) to display the Tasks “to do” list in the right side, as shown here.*

Step 3.  
*Click the New button.*
Microsoft Outlook—Tasks

Step 4.

In the **New Task** window that displays, **enter** the information about the task. It is not required to complete every field. All fields are updateable at any time by opening the task and re-entering the appropriate information.

- **Subject** of the Task, such as *new task*.
- **Due Date** and **Start Date**, if any.
- **Status**, **Priority** and **%Complete**, if this is needed on this task.
- **Indicate a Reminder** information by:
  - **Clicking** a ✓ into the ✓ box
  - **Keying** the date or **clicking** the date you want to be reminded of this task from the drop-down list
  - **Keying** the time or **clicking** the time you want to be reminded from the drop-down list
  - **Clicking** the ☻ and **selecting** a sound from the dialog box that appears to play a sound, if desired, when reminded of this task.
- **The Owner field cannot be changed**. It shows the owner of the task. This should be your name unless you’ve assigned the task to someone else.
- Add any comments or information about the appointment in the large white text box in the bottom of the window.
- **Click Private** checkbox to keep appointment information private (this means that even if another person is given permission to view your tasks folder, details of this task would be unavailable).
- To create a recurrent task, **click** the **Recurrence** button
- To assign a task to someone else, **click** the **Assign Task** button
Task Recurrence

Task recurrence allows you to create a task that is completed on a periodic basis. A recurrent task, for instance, may be something you complete every Friday or the on the first of each month.

By clicking the Recurrence button (described on the previous page), the Task Recurrence dialog box appears and you may set:

- **A Recurrence pattern of Daily, Weekly, Monthly or Yearly**
  - Indicate when the task should recur in the day, week, month or year
  - Indicate if the task should be regenerated and for how long

- **In the Range of Recurrence, the Start Date of recurrence and the End information**

- **Click** the OK button to return to the New Task Window

Details

To indicate Detail information about the Task:

- **Click** the Details tab
- Type in the applicable detail information for this task (if any):
  - Date Completed
  - Total Work
  - Actual Work
  - Mileage
  - Billing Information
  - Companies
  - Update List
Assigning a Task

When a task is assigned to another person, the recipient receives a message in their Inbox to accept or decline the task request. If it is declined, the originator receives a message in their Inbox and the originator remains the owner of the task. When a Task is accepted, it then appears in the Task list of the person who accepted the task. The owner name changes to the person assigned and this appears in the information on the Task in the originator’s Task list, also. For more on accepting and declining assigned tasks that are received in your Inbox, see Check Inbox for Task Assignments, below.

By clicking the Assign button (described previously), the Task window changes so you can send an E-mail message (the To: line is added above the Subject: line) and:

- In the To: text box, type in the e-mail addresses of the recipient(s) or click the To:... button to select the recipient(s) from the Address Book.
- Type a brief message pertaining to the task in the large text box at the bottom of the New Task window.
- To cancel the task assignment, click the Cancel Assignment button.
- Once all the particulars of the task have been completed, click the Send button (as described in Step 5, below) to send the Task Assignment to the recipient.
Step 5.
Once you have indicated all the relevant information and particulars pertaining to the task described in Step 4, **click** the **Save and Close** button (upper left in **New Task** window). If you are assigning the task to someone else, **click** the **Send** button which replaces the **Save and Close** button as shown in **Step 4—Assigning a Task, above**

Step 6.
Once a task has been completed, you may check it off by **Clicking** a ✓ into the ✓ box in the Task pad list. This will strike out, but not delete the task.

Step 7.
- **To delete a task**, **select** it in the Task pad area (**left-click** on the Task)
- **Click** the **delete** button on the toolbar. The deleted task is removed and placed in the **Deleted Items** folder