

# Microsoft Outlook XP Tasks

## Student Manual

*Prepared especially for:  
Philadelphia Gas Works*

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# Table of Contents

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<b>CHAPTER 1 – WORKING WITH TASKS.....</b>	<b>1</b>
OVERVIEW .....	3
CREATING A NEW TASK.....	3
EDITING A TASK.....	6
USING TASK DETAILS.....	7
MARKING A TASK AS COMPLETE .....	9
DELETING A TASK.....	11
CREATING A RECURRING TASK .....	12
SKIPPING AN OCCURRENCE OF A RECURRING TASK .....	15
DELETING A RECURRING TASK .....	16
WORKING WITH TASK VIEWS .....	17
CREATING A TASK ORDER.....	20
PRINTING TASKS .....	23
SETTING GENERAL TASK OPTIONS.....	26
WORKING WITH TASKS IN OUTLOOK TODAY .....	28
EXPORTING THE TASK LIST .....	30
<b>CHAPTER 2 – WORKING WITH CATEGORIES .....</b>	<b>35</b>
OVERVIEW .....	37
ASSIGNING CATEGORIES TO TASKS.....	37
CHANGING CATEGORY ASSIGNMENTS .....	39
CHANGING EXISTING CATEGORIES.....	40
VIEWING TASKS BY CATEGORY .....	43
CUSTOMIZING THE MASTER CATEGORY LIST.....	44
RESETTING THE MASTER CATEGORY LIST .....	45
<b>CHAPTER 3 – ASSIGNING AND TRACKING TASKS.....</b>	<b>47</b>
OVERVIEW .....	49
ASSIGNING A TASK .....	49
RECEIVING AN ASSIGNED TASK.....	52
RECLAIMING OWNERSHIP OF A DECLINED TASK .....	54
DELETING AN INCOMPLETE ASSIGNED TASK.....	55
TRACKING THE STATUS OF A TASK .....	56
REASSIGNING AN ASSIGNED TASK TO ANOTHER USER .....	58
FORWARDING A TASK .....	60

# Table of Contents

---

<b>APPENDIX A – TOOLBARS</b> .....	<b>63</b>
OUTLOOK TASKS FOLDER TOOLBAR .....	65
INDIVIDUAL TASK TOOLBAR .....	65
ASSIGNED TASKS TOOLBARS (TASKS FOLDER).....	65
ASSIGNED TASKS TOOLBARS (INBOX) .....	66
TASKS TOOLBAR BUTTONS .....	67
<b>APPENDIX B – SYMBOLS AND ICONS</b> .....	<b>69</b>
<b>APPENDIX C – TASK E-MAILS</b> .....	<b>73</b>
<b>INDEX</b> .....	<b>77</b>

# Chapter 1

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## Working with Tasks



### Chapter Objectives:

- Creating a New Task
- Editing a Task
- Using Task Details
- Marking a Task as Complete
- Deleting a Task
- Creating a Recurring Task
- Skipping an Occurrence of a Recurring Task
- Deleting a Recurring Task
- Working with Task Views
- Creating a Task Order
- Printing Tasks
- Setting General Task Options
- Working with Tasks in Outlook Today
- Exporting the Task List



## Overview

The Outlook Tasks tool allows the user to manage tasks, to-do items, and commitments without having to keep various lists and scraps of paper around a desk or briefcase. Tasks can be items that occur only once, or they can be recurring items that happen at regular intervals.

Outlook provides a variety of fields for tracking information about a task and its current status. Tasks can be printed for handy reference in a day planner, as well as exported to other applications such as Excel or Access for use in reporting.

This chapter will examine many of the basic procedures for working with tasks, as well as setting options, changing views, and printing.

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## Creating a New Task

A task is any type of responsibility that can be tracked through its completion. The Task folder of Outlook maintains the list of those items or duties that a user must track and accomplish.

The following procedure describes how to create a task that occurs once.



### Procedure:

1.  Click the **Tasks** icon in the Outlook Shortcuts bar.

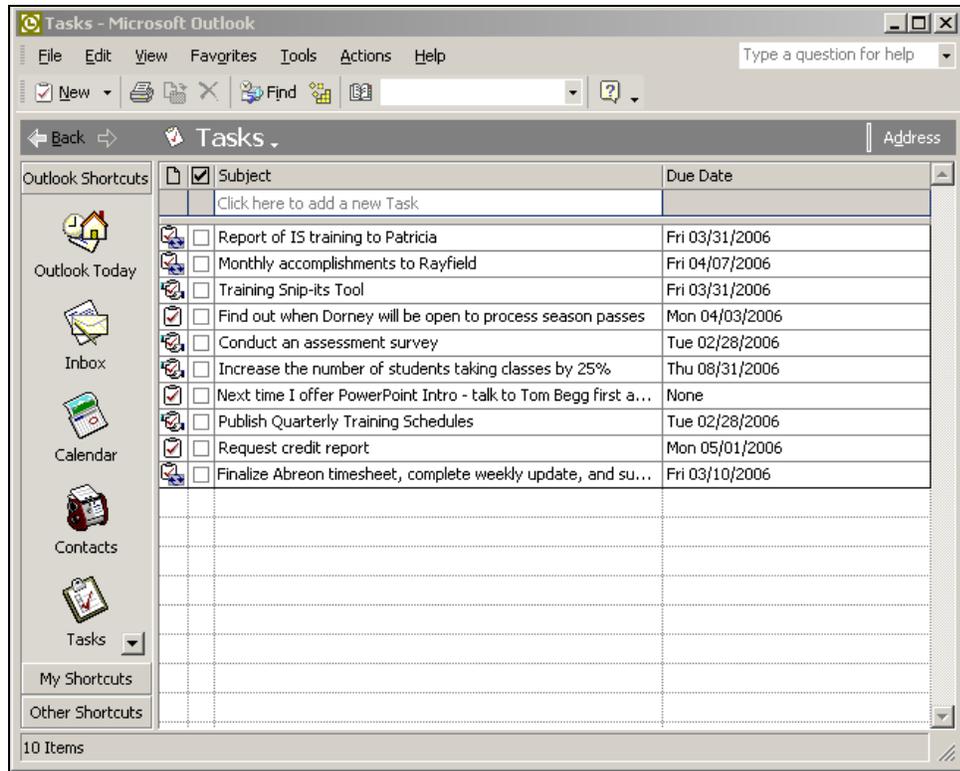
**OR**

Select the **Tasks** folder in the folder list.

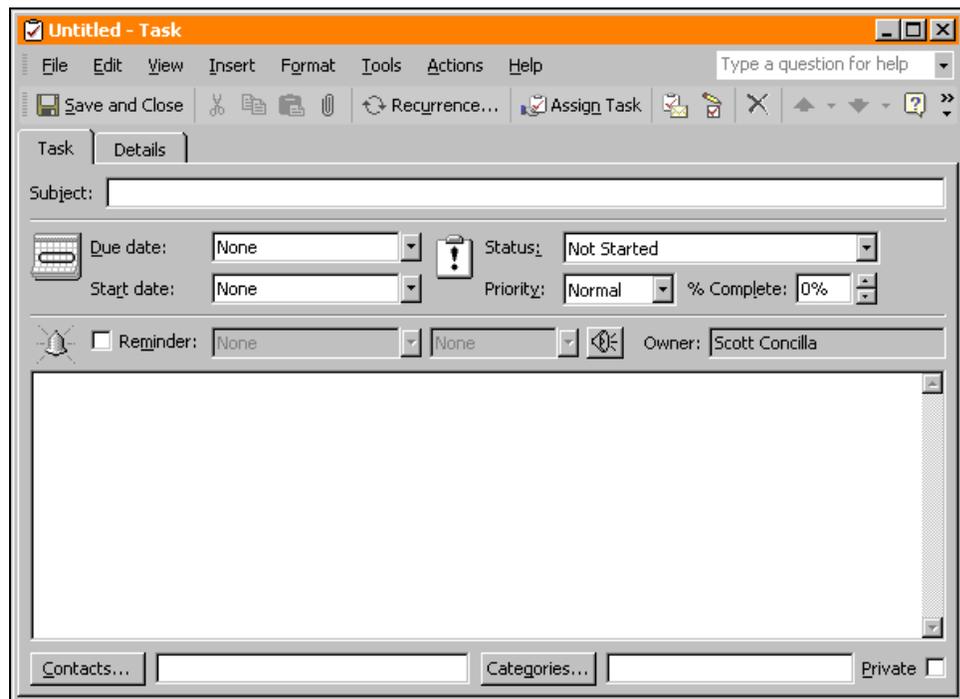
**OR**

Select the **View** menu, choose **Go To**, then **Tasks**.. Outlook displays the task list:

# Chapter 1 – Working with Tasks



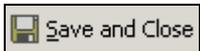
2.  Click the **New Task** button on the **Outlook** toolbar. The **Task** window displays:



# Chapter 1 – Working with Tasks

3. Use the following table to complete the fields on the **Task** tab:

Option	Description
<b>Subject</b>	Type a description or name for the task.
<b>Due Date</b>	Use this field to enter the date on which the task must be completed. If there is no specific Due Date, select None. Type or use the drop-down calendar to enter a date in this field.
<b>Start Date</b>	Use this field to enter the date on which the task must be started. If there is no specific Start Date, select None. Type or use the drop-down calendar to enter a date in this field.
<b>Status</b>	Use the drop-down list to select the task's situation.
<b>Priority</b>	Use the drop-down list to select the task's importance level. Tasks can later be sorted by their priority.
<b>% Complete</b>	Type a number or use the spin controls to enter the amount of the task that is complete.
<b>Reminder</b>	Select this check box to set a reminder and use the corresponding drop-down lists to select or type the date and time the reminder should appear.
<b>Reminder Sound (icon only)</b>	Click this button to display the Reminder Sound dialog box and select a sound file to play when the reminder appears.
<b>Notes</b>	Type any additional notes or information about the task.
<b>Contacts</b>	Enter or select any Outlook Contacts that should be associated with this task.
<b>Categories</b>	Select this option to place the task into a group of related items.
<b>Private</b>	Select this check box to mark the task so that it is hidden from others who (at minimum) have read access to the task list.

4.  Click the **Save and Close** button on the **Task** toolbar when complete.

# Chapter 1 – Working with Tasks

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## Editing a Task

After a task has been created, it may need to be edited to either change due date information, percent complete details, or mark the task as complete.



### Procedure:

1. *Double-click* the task to be edited.

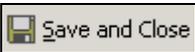
OR

Select the task, then select the **File** menu, choose **Open**, and then **Selected Items**.

OR

*Right-click* the task and select **Open**.

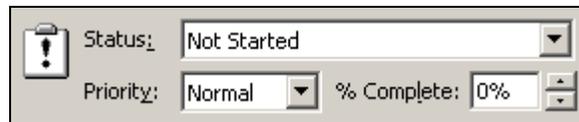
2. Make the necessary changes to the task.

3.  Click **Save and Close** on the **Task** toolbar when complete.



### Tip:

- The **% Complete** value is tied to the **Status** field on the Task tab. If you set % Complete to 100%, Outlook changes the Status to **Completed**. If you set % Complete to 0%, Outlook sets the status to **Not Started**. Any value between 0 and 100 results in a status of **In Progress**. Selecting a value in the **Status** drop-down list has a similar effect on % Complete.



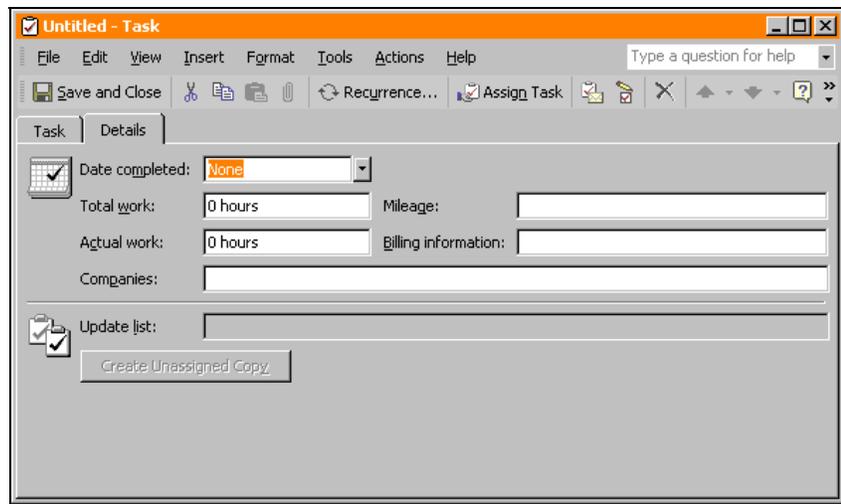
## Using Task Details

The **Details** tab of the **Task** window offers other fields to track task information. Generally, these fields are used once the task is in progress, or once it has been completed.



### Procedure:

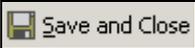
1. Create a new task or open an existing task.
2. Select the **Details** tab.



3. Use the following table to complete the fields on the **Details** tab:

# Chapter 1 – Working with Tasks

Field	Description
<b>Date Completed</b>	Type or select from the drop-down calendar the day the task was finished. A date entered in this field automatically updates the Status and % Complete fields on the <b>Task</b> tab.
<b>Total Work</b>	Type the amount of time the task is expected to take.
<b>Actual Work</b>	Type the amount of time that was actually spent working on the task.
<b>Mileage</b>	Record the number of miles traveled for this task, if necessary.
<b>Billing information</b>	Type any information for billing such as number of hours or the account name to be billed.
<b>Update List</b>	Lists the people whose task lists are updated when a change is made to the task. (Assigned tasks only).
<b>Create Unassigned Copy</b>	Creates a copy of the task so it can be reassigned. This option is only available when the task is one that has been assigned to another user.

4.  Click **Save and Close** on the **Task** toolbar when complete.



## Warning:

- The values for **Total Work** and **Actual Work** on the **Details** tab are not linked to the **% Complete** value on the **Task** tab. Thus, if Total Work is set to 40 hours and Actual Work is set to 20 hours, the % Complete box doesn't show 50% complete. Instead, you must manually specify the value for % Complete.

# Chapter 1 – Working with Tasks

## Marking a Task as Complete

After a task has been physically completed, use the following procedure to record that the task has been accomplished.

It is important to note that when a task is marked as completed, Outlook does not delete or remove it from the task list, rather, it keeps the task on the list and changes the font of the task to strikethrough. This allows the user to keep a visual record of completed tasks.



### Procedure:

1. Open the task to be marked as complete.

The screenshot shows the Outlook 'Task' window for 'Write proposal for workshop training at PGW'. The window has a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with icons for Save and Close, Recurrence, Assign Task, and other task-related actions. The 'Details' tab is active, showing the following fields:

- Subject: Write proposal for workshop training at PGW
- Due date: None
- Start date: None
- Status: In Progress
- Priority: Normal
- % Complete: 75%
- Reminder: None
- Owner: Scott Concilla

At the bottom of the window, there are buttons for 'Contacts...', 'Categories...', and a 'Private' checkbox.

2. In the **% Complete** field, type or use the spin controls to enter **100%**. This automatically changes the **Status** field to **Completed**.

OR

In the **Status** field, choose **Completed** from the drop-down list. This automatically changes the **% Complete** field to **100%**.

OR

In the task list, select the **Complete** check box.

# Chapter 1 – Working with Tasks

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3.  Save and Close Click **Save and Close** on the **Task** toolbar when finished. Tasks that have been marked as completed appear in strikethrough text on the task list.

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<del>Write proposal for workshop training at PGW</del>	None	Completed	100%
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## Tip:

- Dismissing a task reminder DOES NOT mark the task as complete – it simply closes the reminder window. The task will remain incomplete until it is marked as complete by the user.

## Deleting a Task

As seen already, when a task is marked as completed, it is not deleted or removed from the task list. This allows a user to review their completed tasks when necessary.

Tasks that are no longer needed and/or have been completed and need to be removed from the task list can be deleted.



### Procedure:

1. Select the task(s) to be deleted. The **[Shift]** and **[Ctrl]** keys can be used to select a range of tasks.
2.  Click the **Delete** button on the **Standard** toolbar.

**OR**

Select the **Edit** menu and choose **Delete**.

**OR**

Press **[Ctrl] + [D]** or **[Delete]**

**OR**

*Right-click* the task and choose **Delete**.

3. Outlook moves the task to the **Deleted Items** folder.



### Tip:

- To restore a deleted task to the task list, drag it from the Deleted Items folder back to the Tasks folder.

# Chapter 1 – Working with Tasks

## Creating a Recurring Task

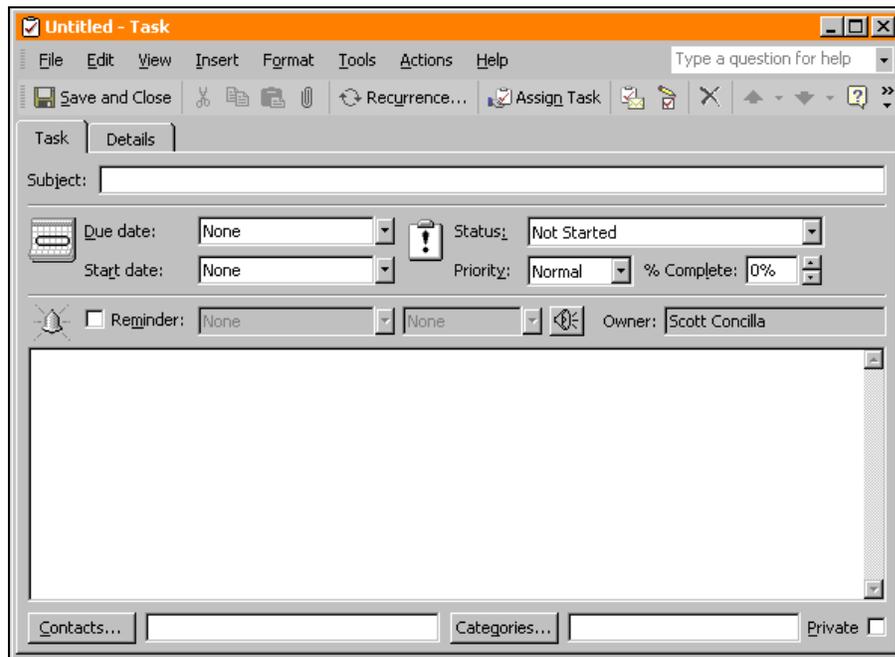
When a task occurs on a regular basis, such as writing a weekly status report, the user only needs to enter the first occurrence of the task and then make the task recurring. Outlook can create the next occurrence of a task based on either a specified time interval or when the task is marked complete.

A recurring task is similar to a recurring appointment in the calendar. However, unlike the calendar which adds all instances of a recurring appointment to the calendar, a recurring task is only added to the task list once. The new instance of the task is only created when the current instance is marked as complete, even if the due date has passed.



### Procedure:

1.  Click the **New Task** button on the **Outlook** toolbar. The **Task** window displays:



2. Enter the task information in the appropriate fields.

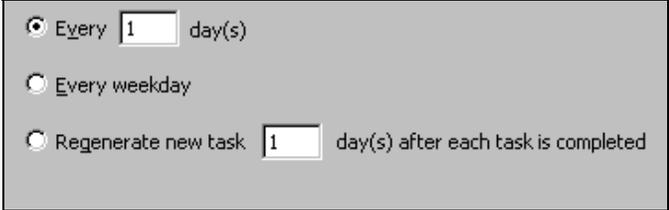
# Chapter 1 – Working with Tasks

3.  Click the **Recurrence** button on the **Task** toolbar.

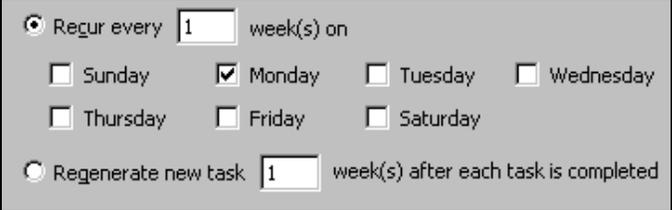
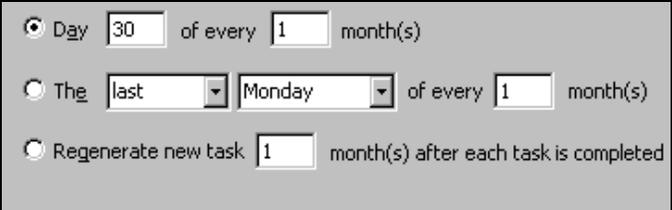
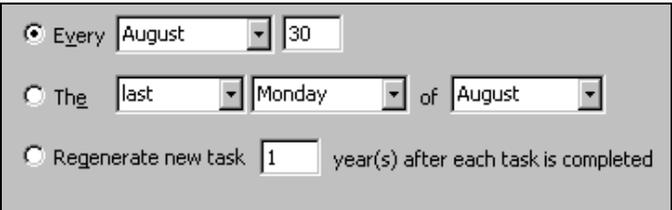
OR

Select the **Actions** menu on the task and choose **Recurrence**. The **Task Recurrence** dialog box displays:

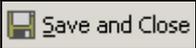
4. Use the following table to complete the options in the **Task Recurrence** dialog box:

Option	Description
<b>Recurrence Pattern</b>	<p>Select <b>Daily</b>, <b>Weekly</b>, <b>Monthly</b>, or <b>Yearly</b> to specify the interval that the task repeats. Depending on the recurrence period chosen, the displayed options will change (see below).</p> <p>Use the radio buttons, check boxes, and drop-down lists to select the appropriate options for the selected period.</p>
<b>Daily</b>	

# Chapter 1 – Working with Tasks

Option	Description
<b>Weekly</b>	
<b>Monthly</b>	
<b>Yearly</b>	
<b>Regenerate new task week(s) after task is completed</b>	Select this option to create a new task based on the interval specified after the original task is marked as complete.
<b>Range of recurrence</b>	In the <b>Start</b> box, type or use the drop-down list to enter the start date of the recurring task.
<b>No end date</b>	Select this option to repeat the recurring task indefinitely.
<b>End after occurrences</b>	Select this option when the recurring task ends after a specific number of occurrences. Type the number of occurrences of the recurring task in the box.
<b>End by</b>	Select this option when the recurring task ends on a specific date. Type or use the drop-down list to enter the ending date.

5. Click **OK** when complete.

6.  Click **Save and Close** on the **Task** toolbar to save the recurring task.

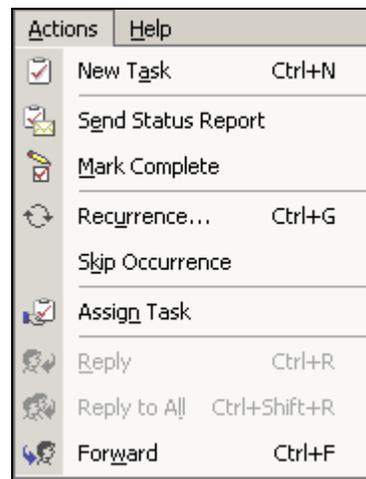
## Skipping an Occurrence of a Recurring Task

An occurrence of a recurring task can be “skipped” without marking it as completed or generating a new task. When an occurrence of a task is skipped, Outlook updates the task due date without creating a completed task in the list.



### Procedure:

1. Open the recurring task that is to be skipped.
2. Select the **Actions** menu of the task and choose **Skip Occurrence**.



3. The task due date will be updated to the next occurrence of the task.
4. Click **Save and Close** on the **Task** toolbar.



### Tip:

- This action can be repeated to skip to a desired date that is already part of the recurrence interval.

# Chapter 1 – Working with Tasks

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## Deleting a Recurring Task

A single instance of a recurring task can be deleted, or if it is no longer needed, the entire recurring task series may also be deleted.



### Procedure:

1. Select the recurring task from the task list.
2. Select the **Edit** menu and choose **Delete**.

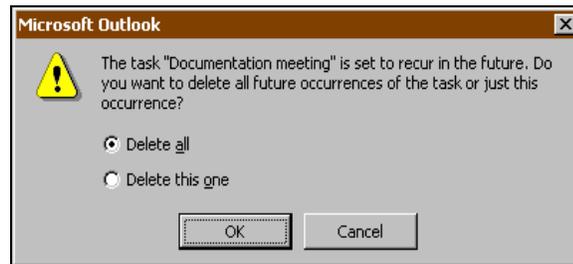
OR



Click the **Delete** button on the **Outlook** toolbar.

OR

Press [**Delete**] on the keyboard. The following dialog box displays:



3. To delete a single occurrence of the task, select **Delete this one** and click **OK**. Outlook will update the task with the next scheduled due date.
4. To delete the series, select **Delete All** and click **OK**. The task will be removed from the list.

## Working with Task Views

There are many different ways to view task information. The information that is displayed regarding the tasks depends on the view chosen. Outlook has a variety of built-in task views for most situations.

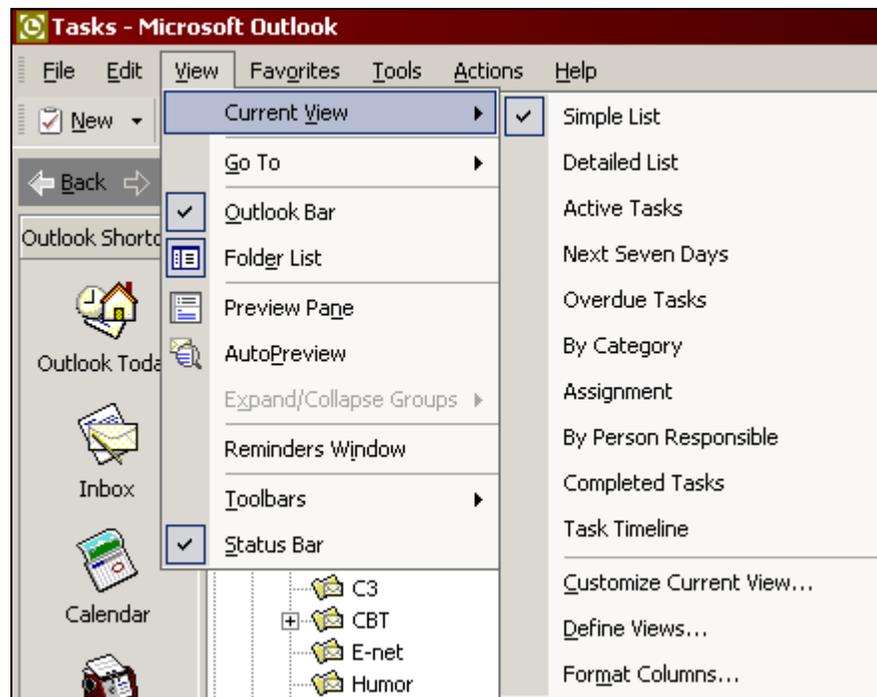
Some views are filtered views, that is, they only show tasks that fit a selected criteria, such as current tasks or incomplete tasks.

Grouped views use Outlook group bars to organize the list into groups that can be collapsed or expanded.



### Procedure:

1. Select the **View** menu, choose **Current View**, and then select a view from the submenu.



2. The following table describes each of the available views:

# Chapter 1 – Working with Tasks

Option	Description
<b>Simple List</b>	Shows the task icon, task name, the due date, and whether the task is completed. This is the default view for the Tasks folder.
<b>Detailed List</b>	A view similar to the simple list, with more information including priority, attachments, status, % complete, and the categories the task is assigned to.
<b>Active Tasks</b>	A filtered view that uses the detailed list view, but only shows tasks that are active (incomplete).
<b>Next Seven Days</b>	A filtered view that uses the detailed list view, but only shows tasks that are due in the next seven days.
<b>Overdue Tasks</b>	A filtered view that uses the detailed list view, but only shows tasks whose due dates have passed and have not been marked as completed.
<b>By Category</b>	A grouped view that uses the detailed list view, and organizes the task list by the categories assigned to tasks.
<b>Assignment</b>	A filtered view that only shows tasks that have been assigned to other people.
<b>By Person Responsible</b>	A grouped view that categorizes tasks according to the person responsible for a task.
<b>Completed Tasks</b>	Shows only completed tasks in detailed list view. This view removes the strikethrough seen on completed tasks in other views.
<b>Task Timeline</b>	Shows the tasks as a timeline. This view does not use columns and headings like other views.

3. Outlook changes the task list to the desired view.



## Tips:

- Only the **Simple List**, **Detailed List**, and **By Category** views have the **Click here to add new Task** bar at the top of the task list.
- Any view can be sorted by clicking a column heading.
- Column widths can be adjusted by dragging the column dividers.



## Warning:

- Some task views contain filters, and will temporarily “hide” task items that do not meet the criteria of the filter. To restore the list, choose a non-filtered view such as **Simple List** or **Detailed List**.

# Chapter 1 – Working with Tasks

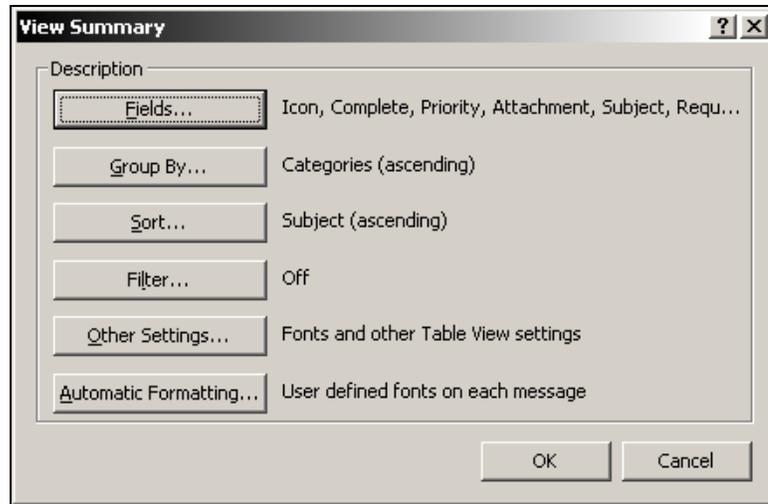
## Creating a Task Order

While Outlook offers many options for sorting tasks by different columns or headings, sometimes it is desirable to put the tasks in a specific order. This procedure allows a user to put the tasks in a custom order in the task list.

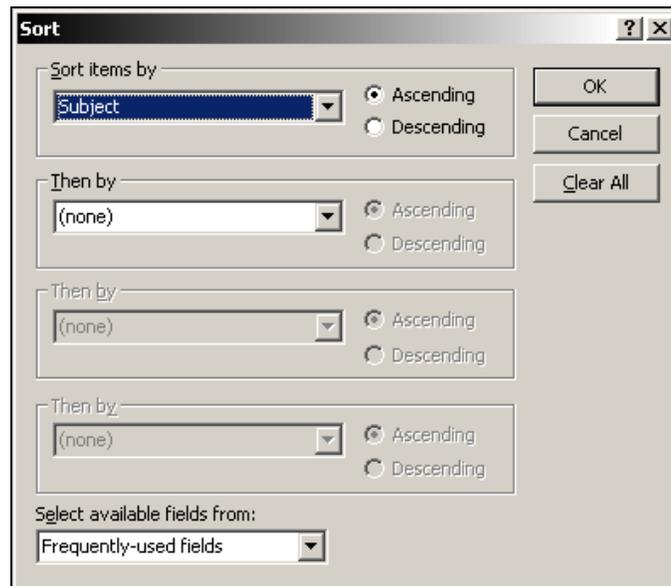


### Procedure:

1. Select the **View** menu, choose **Current View**, and then click **Customize Current View**. The **View Summary** dialog box displays:

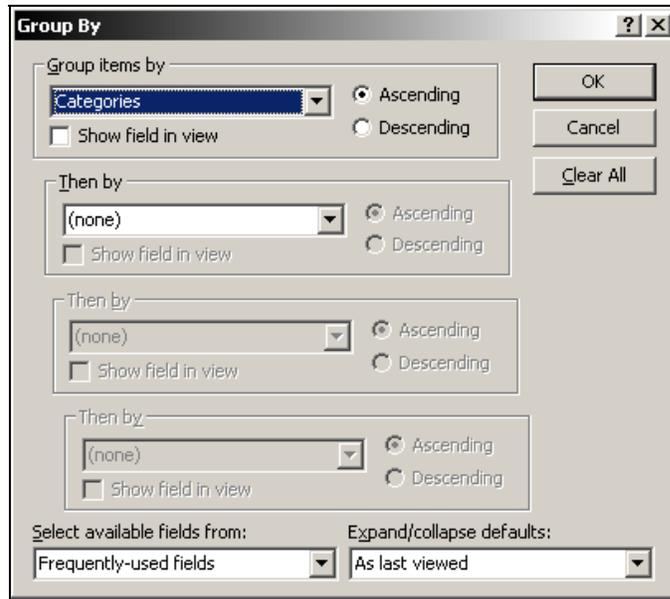


2. Click **Sort**. The **Sort** dialog box displays:



# Chapter 1 – Working with Tasks

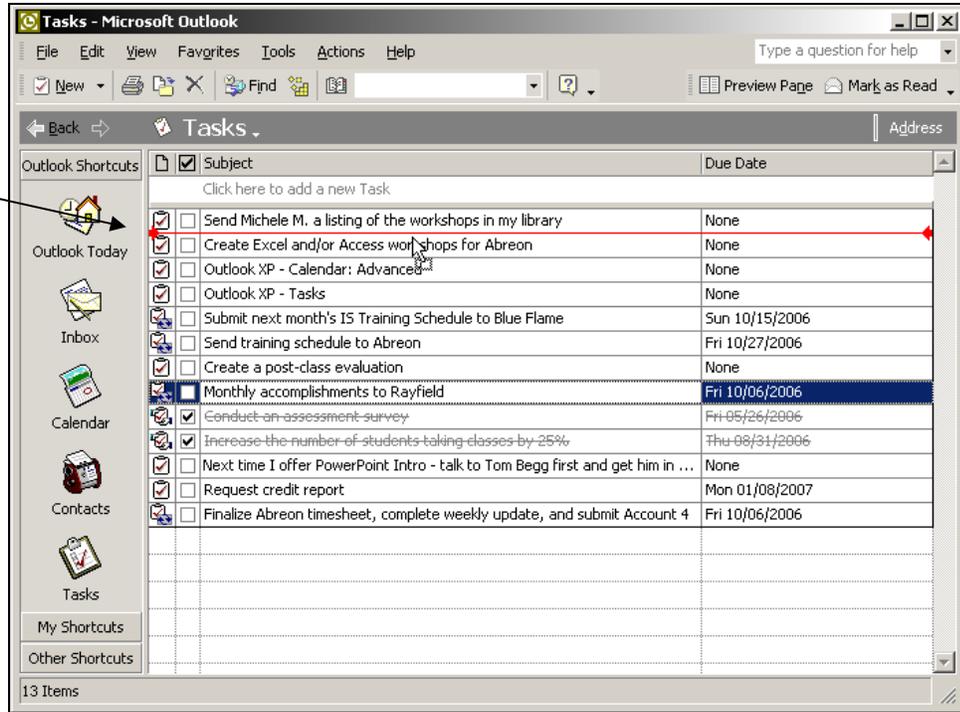
3. Click **Clear All**, and then click **OK**.
4. In the **View Summary** dialog box, click **Group By**. The **Group By** dialog box displays:



5. Click **Clear All**, and then click **OK**.
6. Click **OK** in the **View Summary** dialog box to close it.
7. Drag a task up or down in the task list using the guide to position the task.

# Chapter 1 – Working with Tasks

Position guide



8. To save this order as the default, select the **Actions** menu and choose **Save Task Order**.

## Printing Tasks

Individual tasks, groups of tasks, or an entire task list can be printed. Tasks can be printed in memo style, which prints the entire contents of a task like a Word memo, or in table style, which is like an Excel spreadsheet with headings and columns.

A single task can be printed in memo style. Groups of tasks can be printed in memo or table style. A task list can only be printed in table style.



**Procedure:** (To print a group of tasks or a task list in table style)

1. Select the tasks to be printed, or if printing a task list, do not select anything.
2. Select the **File** menu and choose **Print**.

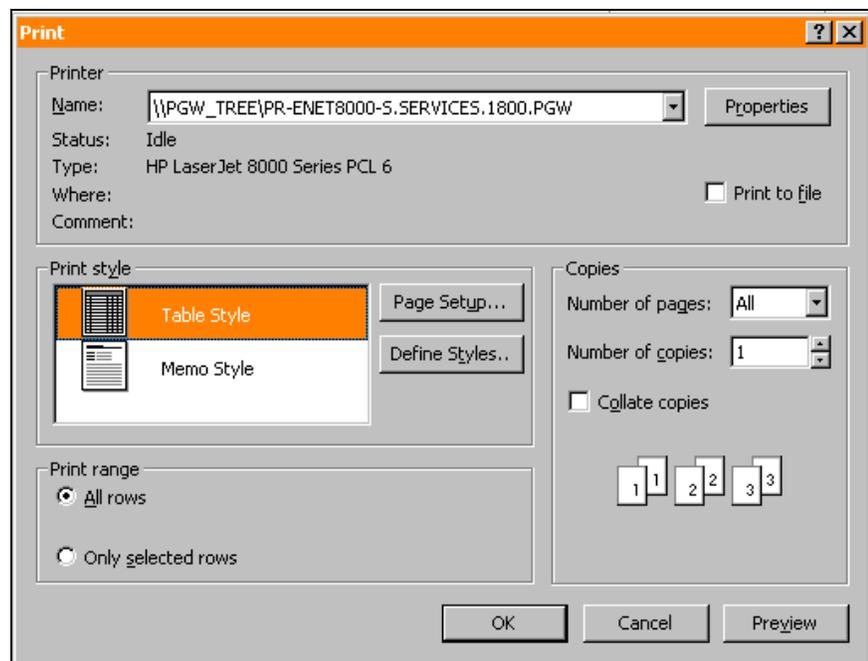
OR



Click the **Print** button on the **Outlook** toolbar.

OR

Press **[Ctrl] + [P]**. The **Print** dialog box displays:



# Chapter 1 – Working with Tasks

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3. In the **Print Style** section, choose **Table Style**.
4. In the **Print Range** section, select **All Rows** to print a complete list of tasks, or **Only Selected Rows** to print only the tasks that were previously selected.
5. Select any other print options as necessary.
6. Click **OK** to print.



**Procedure:** (To print a single task or group of tasks in memo style)

1. Select the task or tasks to be printed from the list.
2. Select the **File** menu and choose **Print**.

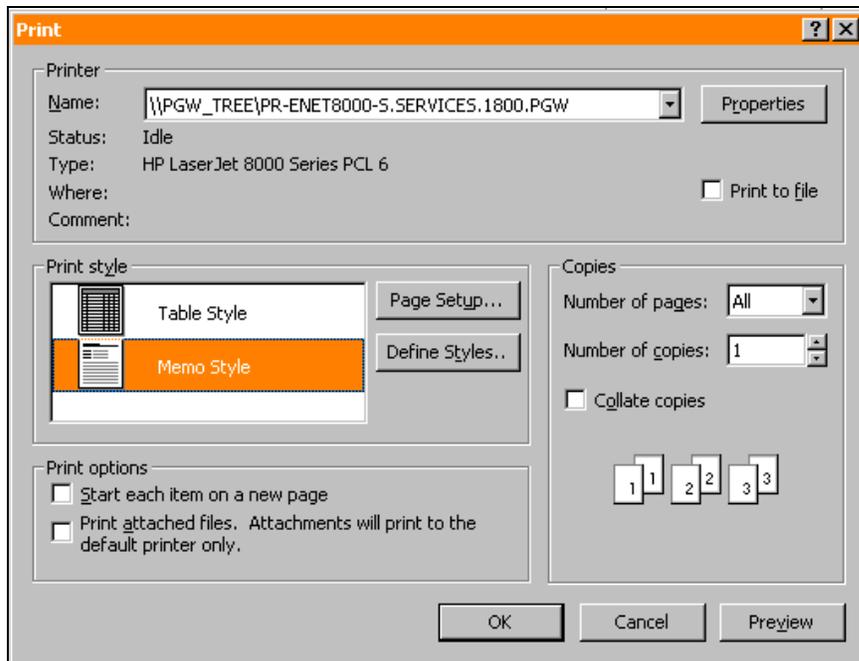
**OR**



Click the **Print** button on the Outlook toolbar.

**OR**

Press **[Ctrl] + [P]**. The **Print** dialog box displays:



# Chapter 1 – Working with Tasks

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3. In the **Print Style** section, choose **Memo Style**.
4. In the **Print Options** section, select any additional options desired.
  - **Start each item on a new page** will be dimmed if only one task is being printed.
  - Select **Print attached files** to have Outlook print any attachments that the task or tasks may have.
5. Select any other print options as necessary.
6. Click **OK** to print

# Chapter 1 – Working with Tasks

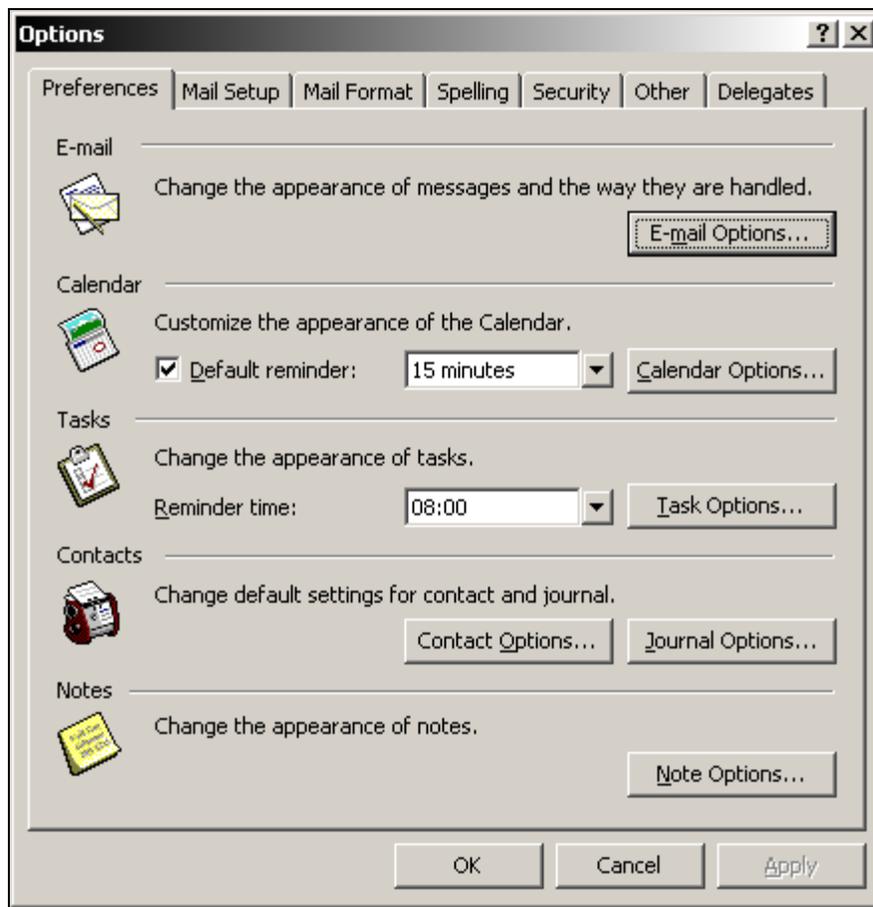
## Setting General Task Options

Outlook provides a few options that control the appearance of items in the Tasks folders, reminders, and other task-related elements. These options can be set by the user to further customize the task list and its behavior.



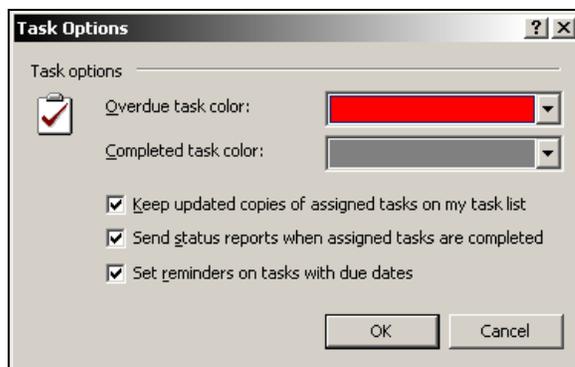
### Procedure:

1. Select the **Tools** menu and choose **Options**. The **Options** dialog box displays:



2. In the **Tasks** section, use the **Reminder Time** option to set the default time for reminders when a **Due Date** is added to a task, or when the **Reminder** option is selected.
3. Click the **Task Options** button to access additional task options.

# Chapter 1 – Working with Tasks



4. The table below describes these options:

Option	Description
<b>Overdue Task Color</b>	Use the drop-down list to select the text color for overdue tasks.
<b>Completed Task Color</b>	Use the drop-down list to select the text color for tasks that have been completed.
<b>Keep Updated Copies of Assigned Tasks On My Task List</b>	Sets the default for when a task is assigned to another user. When enabled, a copy of an assigned task will automatically be placed on the assigner's list, and the assigner will be notified with the assignee makes updates to the task. Can be changed on any individual task.
<b>Send Status Reports When Assigned Tasks Are Completed</b>	Sets the default for when an assigned task is completed by the assignee. When enabled, a status report e-mail with the details of the task will automatically be sent to the task assigner. Can be changed on any individual task.
<b>Set Reminders on Tasks with Due Dates</b>	Select this option to have Outlook automatically add a reminder time to tasks when a due date is selected. The default time will be the time set in the Reminder Options drop-down of the Tasks section.

5. Click **OK** to close the **Task Options** dialog box.
6. Click **OK** to close the **Options** dialog box.

# Chapter 1 – Working with Tasks

## Working with Tasks in Outlook Today

The Outlook Today folder gives the user a “quick glance” of several areas of Outlook at once. Information displayed includes upcoming appointments from the Calendar, current Tasks from the task list, and folders with new e-mails from the Inbox.

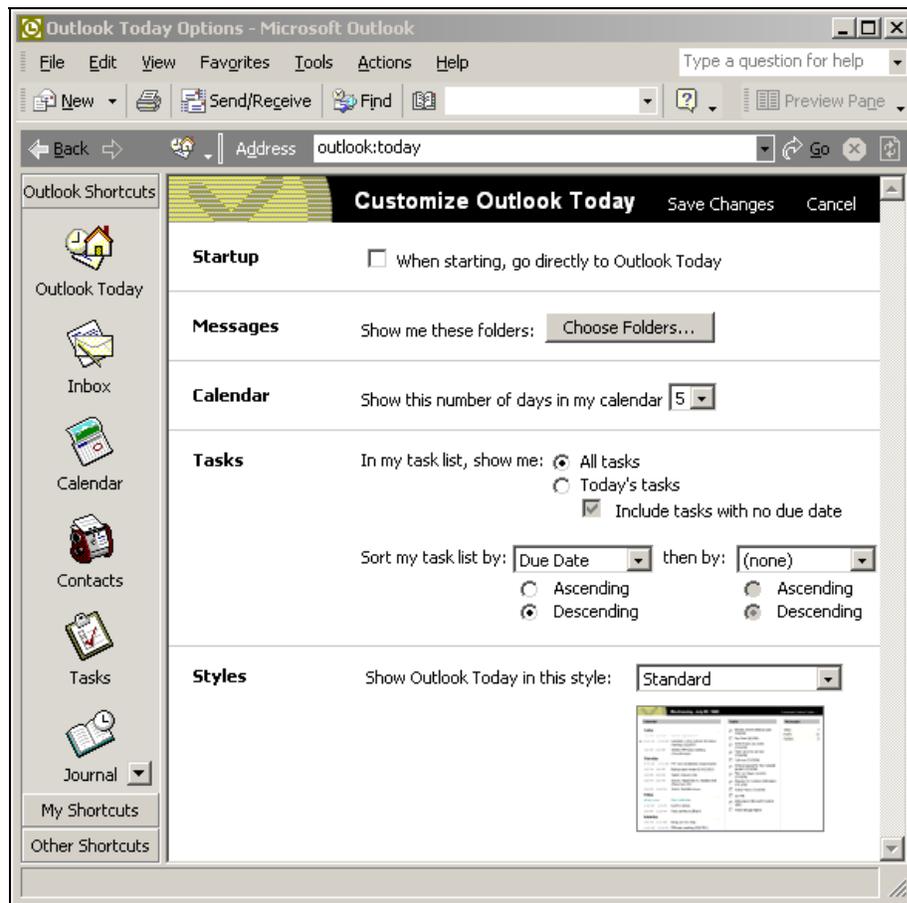
From Outlook Today, you can mark a task as completed (or incomplete) by selecting its check box, or you can edit or modify a task by clicking its description.

The following procedure allows you to configure the task information displayed in Outlook Today.



### Procedure:

1. In the **Outlook Today** folder, click **Customize Outlook Today**. (The location of this button will differ depending on the selected style.) The **Customize Outlook Today** window displays:



# Chapter 1 – Working with Tasks

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2. In the **Tasks** section, select from the following options:

Option	Description
<b>In my task list, show me</b>	Select <b>All tasks</b> to display all tasks (regardless of status) in Outlook Today, or select <b>Today's tasks</b> to display only those tasks that are due today.
<b>Include tasks with no due date</b>	When the <b>Today's tasks</b> option is selected, this option will add any tasks without a due date to the Outlook Today list. This option is dimmed when <b>All tasks</b> is selected.
<b>Sort my task list by</b>	Use the drop-down lists to select a primary and secondary sort for the task list in Outlook Today. The sorts can be either <b>Ascending</b> or <b>Descending</b> . Select <b>(none)</b> to remove a sort.

3. Click **Save Changes** when complete.

# Chapter 1 – Working with Tasks

## Exporting the Task List

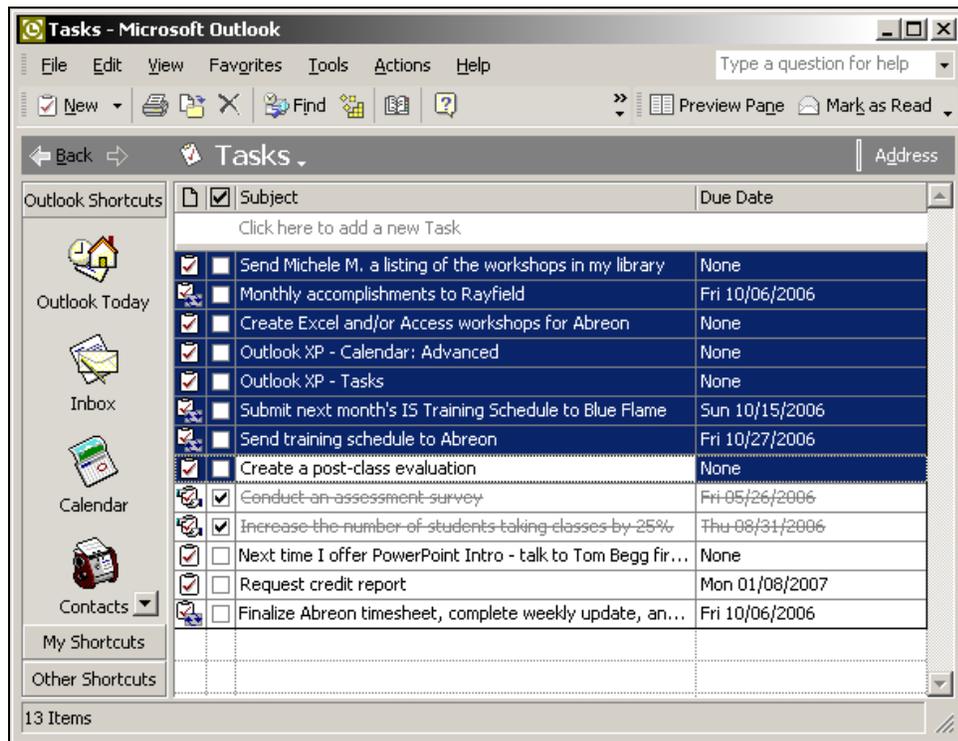
Because it is organized similar to a spreadsheet with columns and rows, the task list can easily be copied and pasted to an Excel worksheet for further analysis and reporting.

The task list can also be exported to Excel and Access, as well as the Import and Export Wizard can export the tasks in a variety of database-friendly formats.



**Procedure:** (To export the task list to Excel using copy and paste)

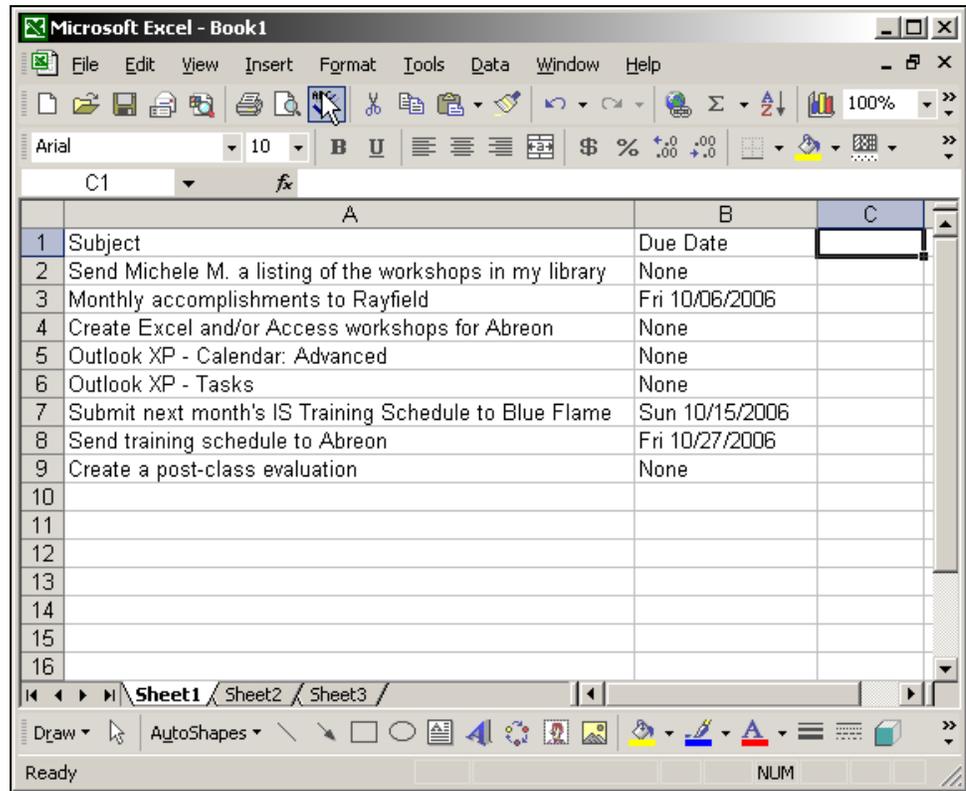
1. Using the mouse, select the tasks to be exported from the list. The standard windows selection keys – **[Shift]** and **[Ctrl]** – can be used in combination with the mouse to select multiple tasks, or to select the entire task list, press **[Ctrl] + [A]**, or from the **Edit** menu, choose **Select All**.



2. Select the **Edit** menu and choose **Copy**.
3. Open Excel, select the **Edit** menu, and choose **Paste**.

# Chapter 1 – Working with Tasks

- The tasks are pasted into Excel. Adjust the column widths and formatting as necessary.



	A	B	C
1	Subject	Due Date	
2	Send Michele M. a listing of the workshops in my library	None	
3	Monthly accomplishments to Rayfield	Fri 10/06/2006	
4	Create Excel and/or Access workshops for Abreon	None	
5	Outlook XP - Calendar: Advanced	None	
6	Outlook XP - Tasks	None	
7	Submit next month's IS Training Schedule to Blue Flame	Sun 10/15/2006	
8	Send training schedule to Abreon	Fri 10/27/2006	
9	Create a post-class evaluation	None	
10			
11			
12			
13			
14			
15			
16			



## Tips:

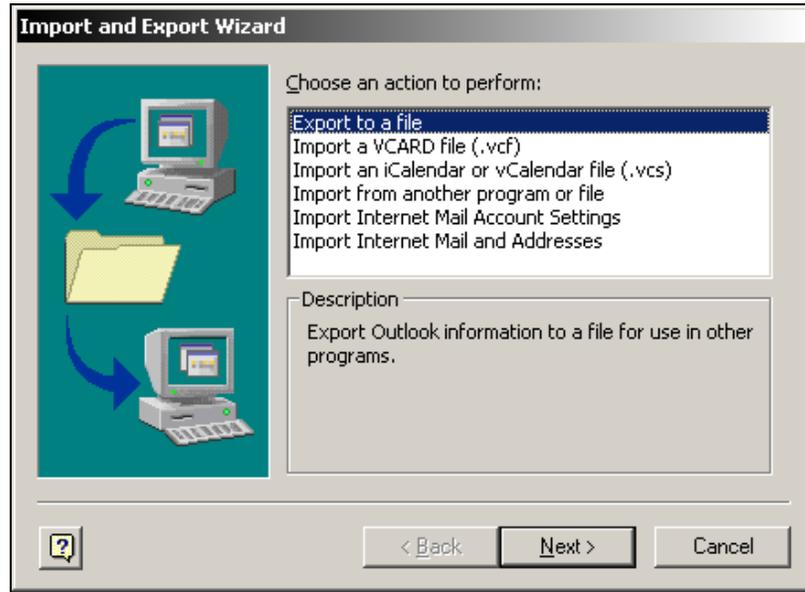
- While any task list view can be copied and pasted into Excel, it is best to use a non-grouped view such as **Simple List** or **Detailed List** for this operation.
- This method will only copy and paste columns that are currently visible. It will not export any other information about the task.

# Chapter 1 – Working with Tasks

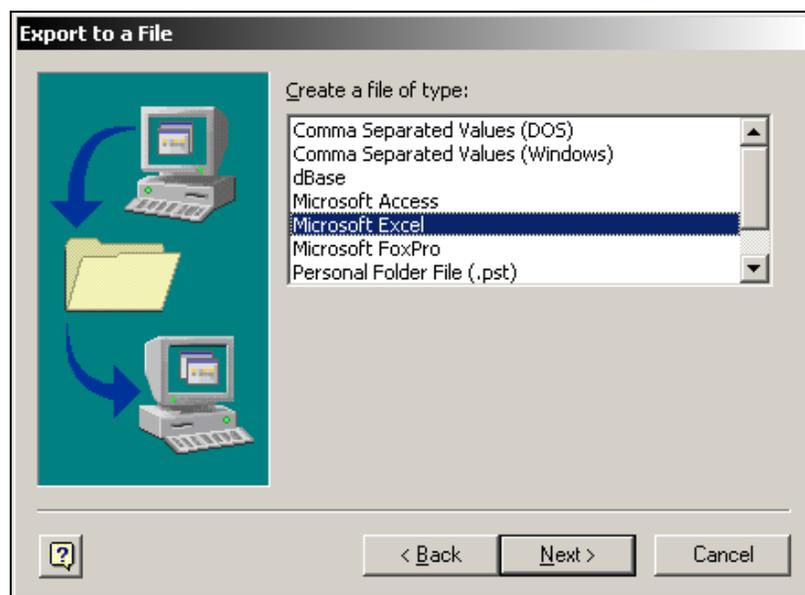


**Procedure:** (To export the task list using the Import and Export Wizard)

1. Select the **File** menu and choose **Import and Export**. The **Import and Export Wizard** displays:

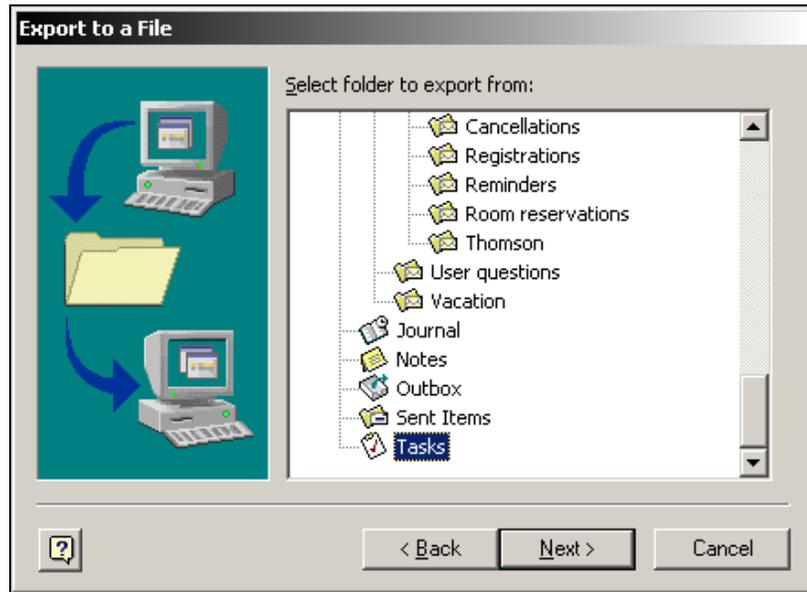


2. In the **Choose an action to perform** section, select **Export to a file** and click **Next**.
3. Select from the list the type of file to be created and click **Next**.

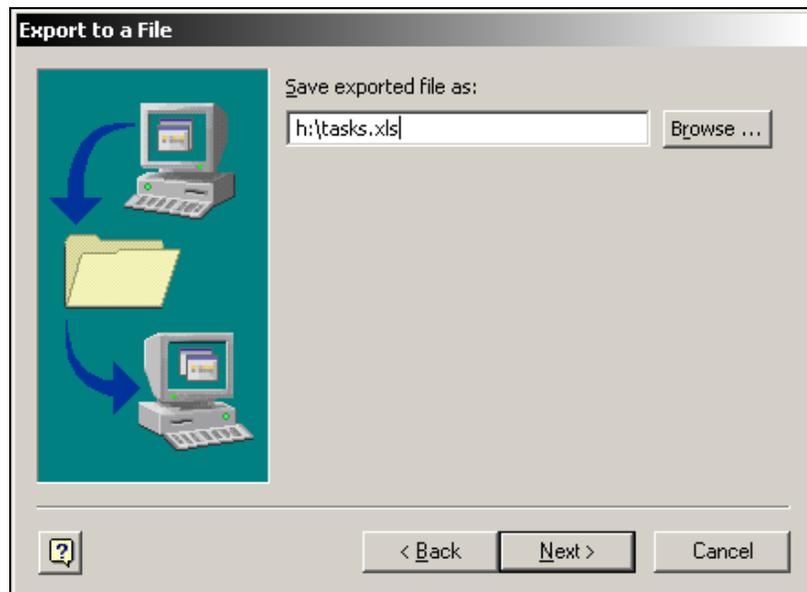


# Chapter 1 – Working with Tasks

4. Select the Outlook folder to be exported.

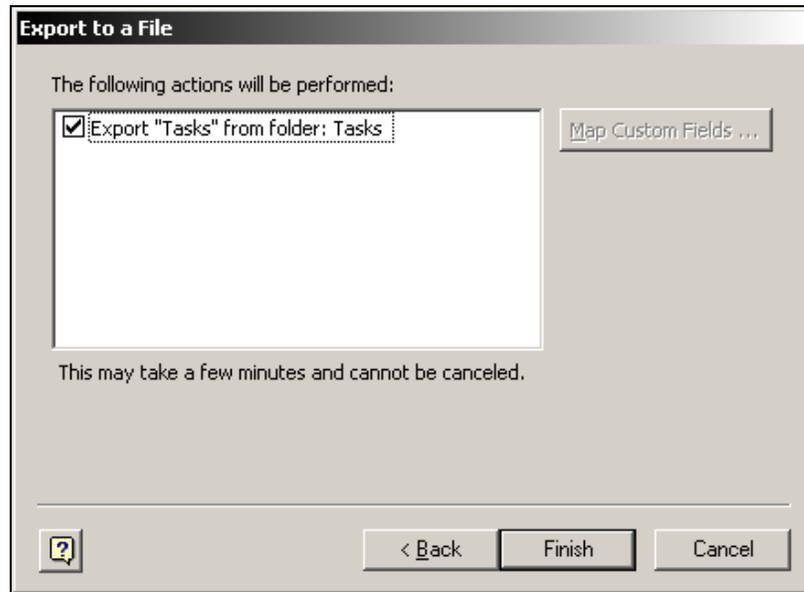


5. Type a location and name of the file that should be created. Use the **Browse** button if necessary to locate a specific directory. Click **Next**.

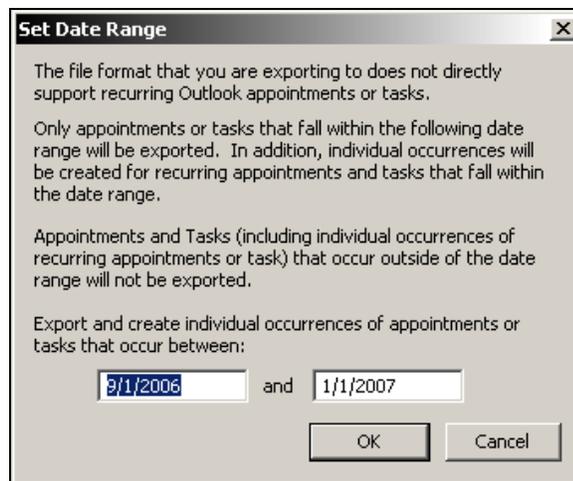


# Chapter 1 – Working with Tasks

- The last step of the wizard displays a list of actions that will be performed. Click **Finish** to begin the export.



- If there are recurring tasks in the tasks folder, the **Set Date Range** dialog box displays:



- Type in the desired date range and click **OK**.
- Outlook completes the export and closes the wizard.

# Chapter 2

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## Working with Categories



### Chapter Objectives:

- Assigning Categories to Tasks
- Changing Category Assignments
- Changing Existing Categories
- Viewing Tasks by Category
- Customizing the Master Category List
- Resetting the Master Category List



# Chapter 2 – Working with Categories

## Overview

To help make the organization of tasks easier, Outlook uses **Categories**, which are words or phrases that can be assigned to a task at any time to help put the Tasks into logical groups.

Categories can actually be used on almost all Outlook items (e-mails, appointments, contacts, etc.), however, this chapter will focus exclusively on their use with Tasks.

This chapter will explore how to assign categories to tasks, how to change category assignments, and how to adjust Outlook's Master Category List to suit your needs.

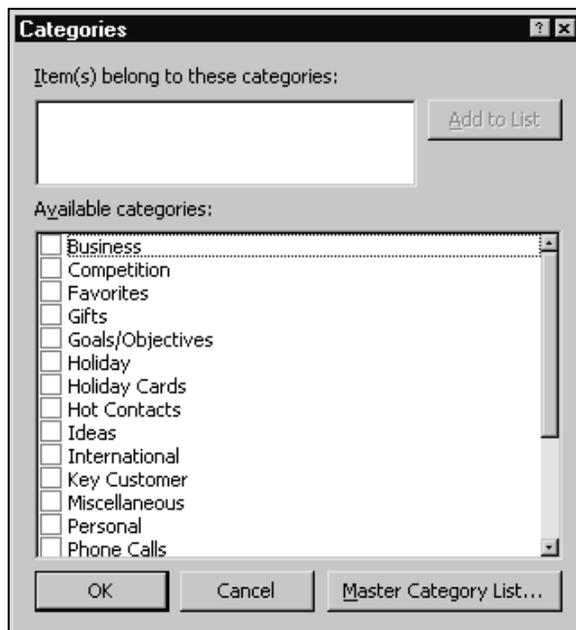
## Assigning Categories to Tasks

A category within Outlook is a keyword or phrase attached to a task. Categories allow related tasks to be kept together. In certain Outlook views, categories can also be used to filter, sort, or group tasks.



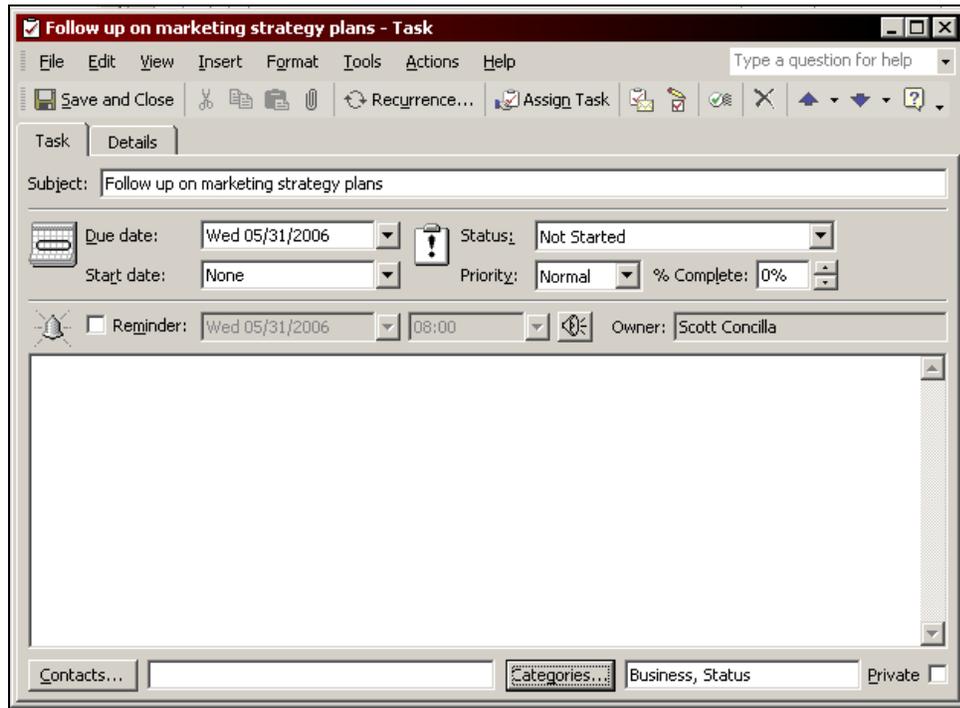
**Procedure:** (To assign a category to a task)

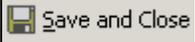
1. Create a new task or open an existing task.
2. Click the **Categories** button. The **Categories** dialog box displays:



## Chapter 2 – Working with Categories

3. Select one or more categories the task should be associated with by selecting the check boxes and then click **OK**.
4. The category selection(s) now appear in the **Categories** field of the task.



5.  Click **Save and Close** on the **Task** toolbar.



### Tip:

- To quickly add a new category to the list, type the category title in the **Item(s) belong to these categories** box and click **Add to List**.

# Chapter 2 – Working with Categories

## Changing Category Assignments

At times, it may be necessary to change the category assignment of a single task or a group of tasks.

In some cases, you'll want to change the category assignments of several items at one time, for example, replacing a misspelled category name with the correct spelling. After changing the category list, any items to which were assigned the old category will still have the incorrect spelling. You will need to search for all items with the old category and assign the new one to them.

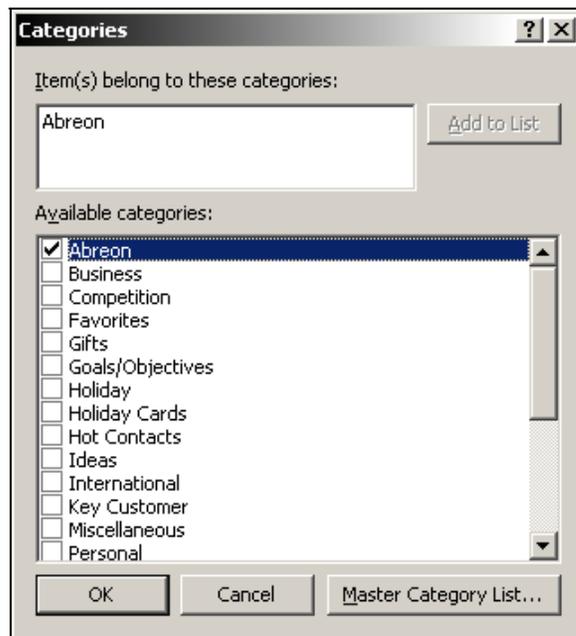


### Procedure:

1. Select the task(s) whose category is to be changed.
2. Select the **Edit** menu and choose **Categories**.

OR

*Right-click* the item and choose **Categories**. The **Categories** dialog box displays:



3. Add and remove categories from the item(s) as necessary and click **OK** when completed.

# Chapter 2 – Working with Categories

## Changing Existing Categories

For one reason or another, category names might need to be changed. Perhaps the category name was misspelled when it was created it, or the wording of the category title might need to be edited. Unfortunately, existing category titles cannot be modified.

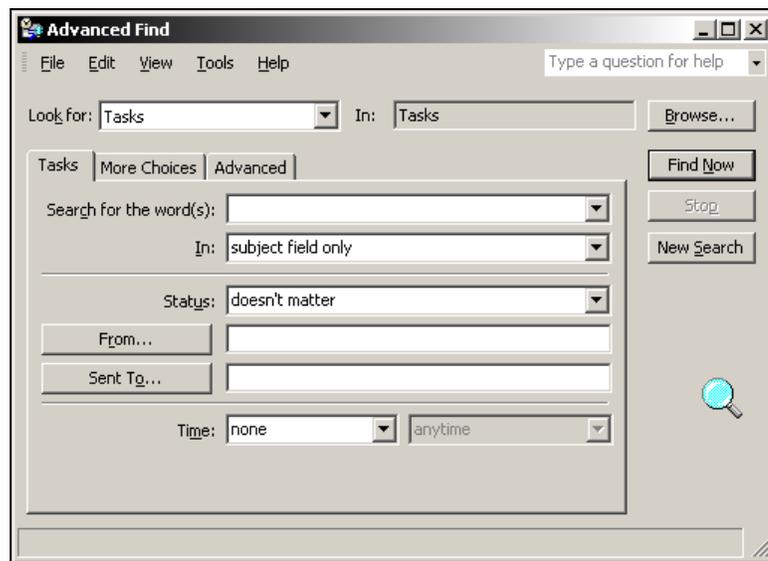
Before changing categories, however, it is important to understand the ramifications. Changing a category name does not modify the category for tasks to which it has already been assigned. When a category is deleted, any tasks previously assigned to that category will still have that category assignment — Outlook won't automatically change them to the new category.

Outlook also does not delete the category assignments of tasks whose categories are no longer in the list. Because the old categories remain associated with tasks, searches can be performed using the old category names. Therefore, when changing a category name, search for all tasks using the old category and then assign those tasks to the new category.



### Procedure:

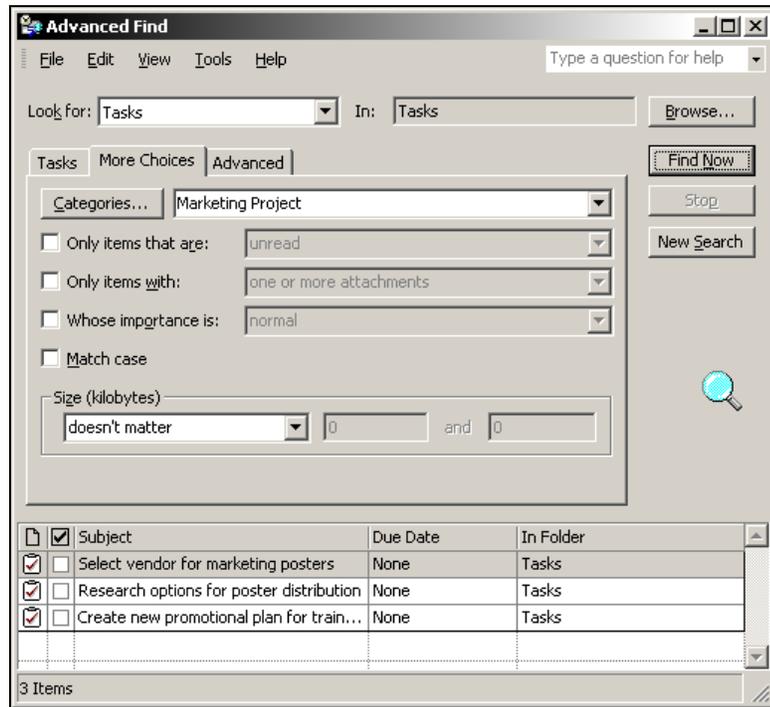
1. Select the **Tools** menu and choose **Advanced Find**. The **Advanced Find** dialog box displays:



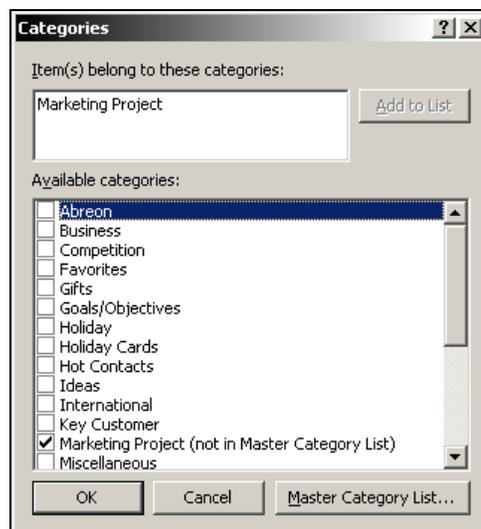
2. Make sure **Tasks** is selected in the **Look for** drop-down list.
3. Click the **More Choices** tab.

## Chapter 2 – Working with Categories

4. Type the old category name in the **Categories** box and click **Find Now**. Outlook displays a list of the tasks that were found with that category:



5. In the search results area, use the mouse to select the tasks whose categories need to be changed. To select all of the tasks, select the **Edit** menu and choose **Select All**.
6. In the **Advanced Find** dialog box, select the **Edit** menu and choose **Categories**. The **Categories** dialog box displays. Notice that the **Marketing Project** category is listed as **(not in Master Category List)**.



## Chapter 2 – Working with Categories

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7. In the **Available categories** list, remove the checkmark from the old category selection box
8. Type a new category name in the **Item(s) belong to these categories** area.

**OR**

If the new category name has already been created, select it from the **Available categories** list.



9. Click **OK** to assign the new category.
10. Close the **Advanced Find** dialog box.

# Chapter 2 – Working with Categories

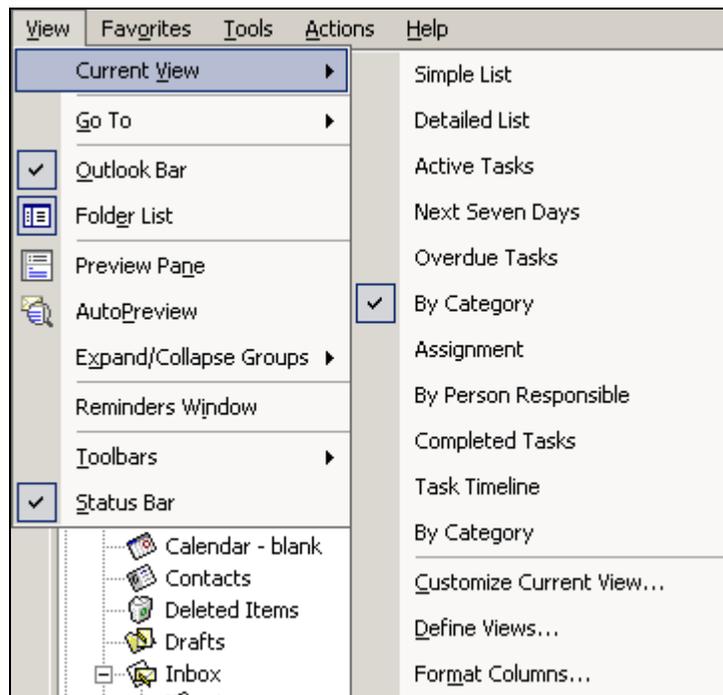
## Viewing Tasks by Category

Once assigned to categories, the task list view can be changed to display the Tasks as category groups that can be expanded or collapsed.



### Procedure:

1. Select the **View** menu, choose **Current View** and then **By Category**.



2. The task list will change to **By Category** view. Each category will be separated by a group bar, and can be expanded or collapsed using the **[+]** and **[-]** buttons.



### Tip:

- If a task has been assigned to more than one category, it will appear in each category group. However, it is still a single task and all changes and updates to the task will appear in every group.

# Chapter 2 – Working with Categories

## Customizing the Master Category List

A master category list is supplied within Outlook. However, customized categories created by the user can be added to suit individual goals, groups, or projects.

In this way, all items, whether they are tasks, appointments, or e-mail messages, can be grouped into one category, such as ABC Company or Marketing Project.



### Procedure:

1. In the **Categories** dialog box, click **Master Category List**. The **Master Category List** dialog box displays:



2. Type the name of the new category in the **New category** box and click **Add**.
3. To remove a category, select the category and click **Delete**.
4. Click **OK** to return to the **Categories** dialog box. The new category will appear in the list and can be assigned to tasks (as well as other Outlook items).

## Chapter 2 – Working with Categories

### Resetting the Master Category List

Resetting the Master Category List causes all custom categories to be removed and the list is restored to its factory default. Keep in mind that although this removes the custom categories from the master category list, it does not remove those categories from the items to which they are assigned.

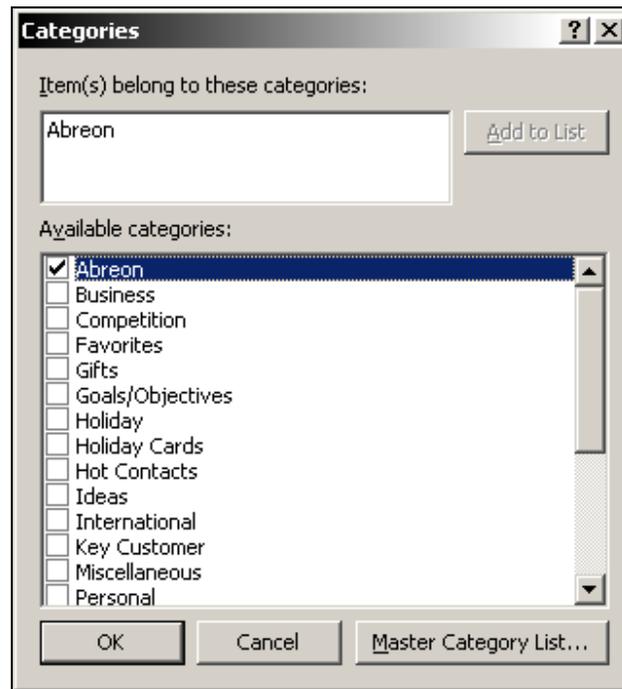


#### Procedure:

1. Select any Outlook task.
2. Select the **Edit** menu and choose **Categories**.

OR

*Right-click* the item and select **Categories**. The **Categories** dialog box displays:



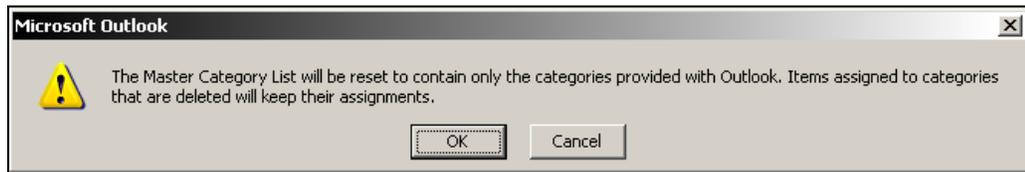
3. Click the **Master Category List** button. The **Master Category List** dialog box displays:

## Chapter 2 – Working with Categories

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4. Click **Reset**. Outlook displays the following warning:



5. Click **OK** to confirm or **Cancel** to abort the reset.
6. Click **OK** to close the **Category** dialog boxes.

# Chapter 3

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## Assigning and Tracking Tasks



### Topics:

- Assigning a Task
- Receiving an Assigned Task
- Reclaiming Ownership of a Declined Task
- Deleting an Incomplete Assigned Task
- Tracking the Status of a Task
- Reassigning an Assigned Task to Another User
- Forwarding a Task



# Chapter 3 – Assigning and Tracking Tasks

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## Overview

In addition to creating Tasks for yourself, Outlook has the ability to create tasks and assign them to other people.

Using this group feature, a manager could assign the tasks for a project to the different members of their project team, and track the progress of those tasks by keeping updated copies and requesting status reports.

The task assignment process uses e-mails and the Inbox to communicate task assignments, updates, and completions. A complete description of each type of task-related e-mail, and what happens on each end (the assigner and assignee) can be found in **Appendix C – Task E-mails**.

This chapter will explore the process of assigning tasks to other users, receiving assigned tasks, tracking the progress of tasks, and completing assigned tasks.

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## Assigning a Task

As a manager or team member, there will be times when tasks have to be assigned to others. The assignee receives the task in the Outlook Inbox and has the ability to place the task in their task list.



### Procedure:

1. Create a new task.
2.  Click the **Assign Task** button on the **Task** toolbar.

OR

Select the **Actions** menu and choose **Assign Task**. The **Task** window changes:

## Chapter 3 – Assigning and Tracking Tasks

The screenshot shows the 'Untitled - Task' dialog box. The 'Task' tab is active. A yellow warning bar at the top indicates 'This message has not been sent.' Below this are fields for 'To...', 'Subject:', 'Due date:', 'Start date:', 'Status:', 'Priority:', and '% Complete:'. The 'Status' is set to 'Not Started' and 'Priority' is 'Normal'. There are two checked checkboxes: 'Keep an updated copy of this task on my task list' and 'Send me a status report when this task is complete'. At the bottom, there are 'Contacts...' and 'Categories...' buttons, and a 'Private' checkbox.

3. In the **To** field, enter the e-mail address of the person to whom the task is to be assigned, or click the **To** button to open the Address Book and select a name from the list.
4. Type the **Subject** of the task.
5. If desired, set the **Due date** or **Start date** of the task.
6. To receive an e-mail notification every time the assignee makes a change or update to the task, select **Keep an updated copy of this task on my task list**.
7. To receive an e-mail message when the assignee marks the task as completed, select **Send me a status report when this task is complete**.
8. Use the **Notes** area for any additional information about the task.
9.  Click the **Send** button on the **Task** toolbar to send the task request.

## Chapter 3 – Assigning and Tracking Tasks



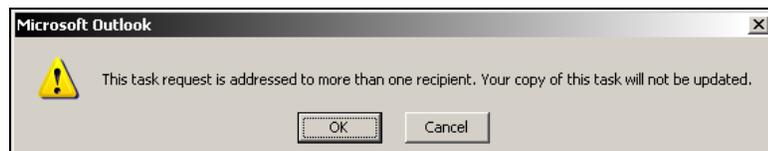
### Tip:

-  **Cancel Assignment** Click the **Cancel Assignment** button on the **Task** toolbar to cancel an assignment and restore the original task form.

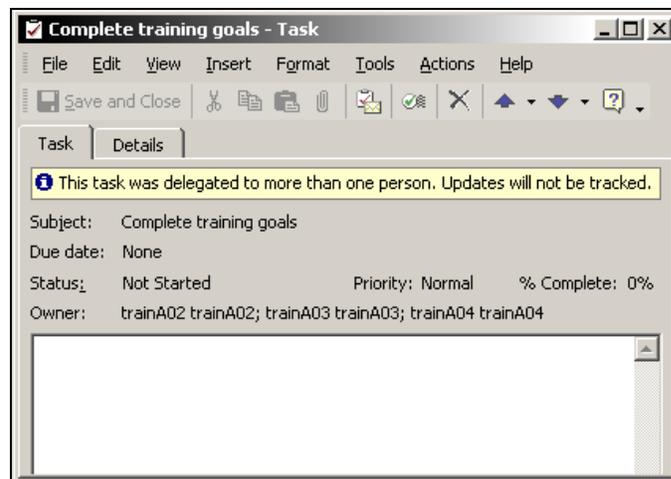


### Warning:

- If you attempt to assign a task to more than one person, you cannot keep an updated copy of the task in your task list.



You will also see the following message in the Info bar of the task in your task list:



To circumvent this problem, create a separate task for each person and assign the tasks using the previous procedure.

- The **Send me a status report when this task is complete** option does work when assigning a task to multiple users, but as stated before, the task will not show any updates in the task list, nor will it be marked as complete even when all assignees have completed the task.

# Chapter 3 – Assigning and Tracking Tasks

## Receiving an Assigned Task

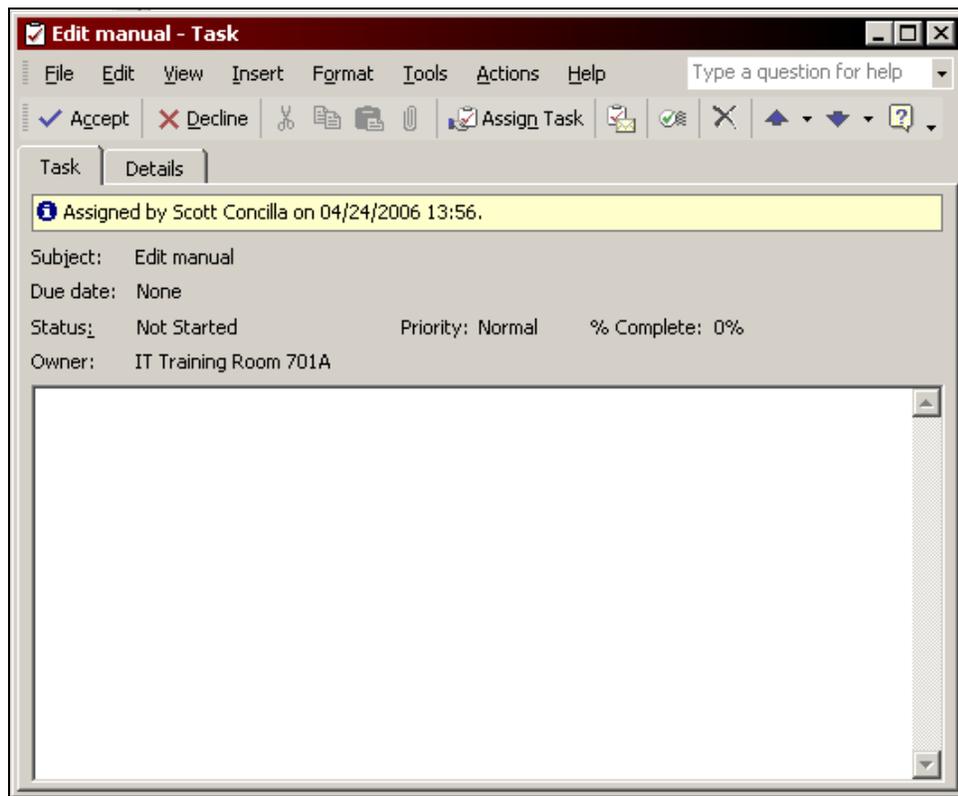
When you receive a task request from someone who wants to assign a task to you, the message includes buttons that allow you to accept or decline the task.

You can click either Accept or Decline to respond to the request. If the preview pane isn't open, you can open the message and click Accept or Decline on the message form toolbar.



**Procedure:** (To accept or decline an assigned task)

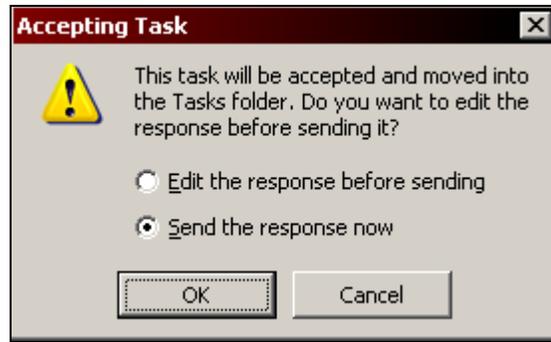
1. In the **Inbox**, open the **Task Request** notification e-mail.



2. Click either the **Accept** or **Decline** button on the toolbar. For **Accept**, the following dialog box displays (a similar dialog box with different wording, but the same options, displays for **Decline**):

## Chapter 3 – Assigning and Tracking Tasks

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3. To send a response without comment, select **Send the response now** and click **OK**. If **Accept** was selected, the task is then moved from the Inbox to the task list.

OR

To send a response with comments, select **Edit the response before sending** and click **OK**. Outlook will open an e-mail to the task assigner. Edit the e-mail and then click **Send**. The task is then moved from the Inbox to the task list.



### Tip:

- When a task is initially accepted, it will appear as an unread task in the task list of both the assigner and the assignee. Open the task to mark it as read.

# Chapter 3 – Assigning and Tracking Tasks

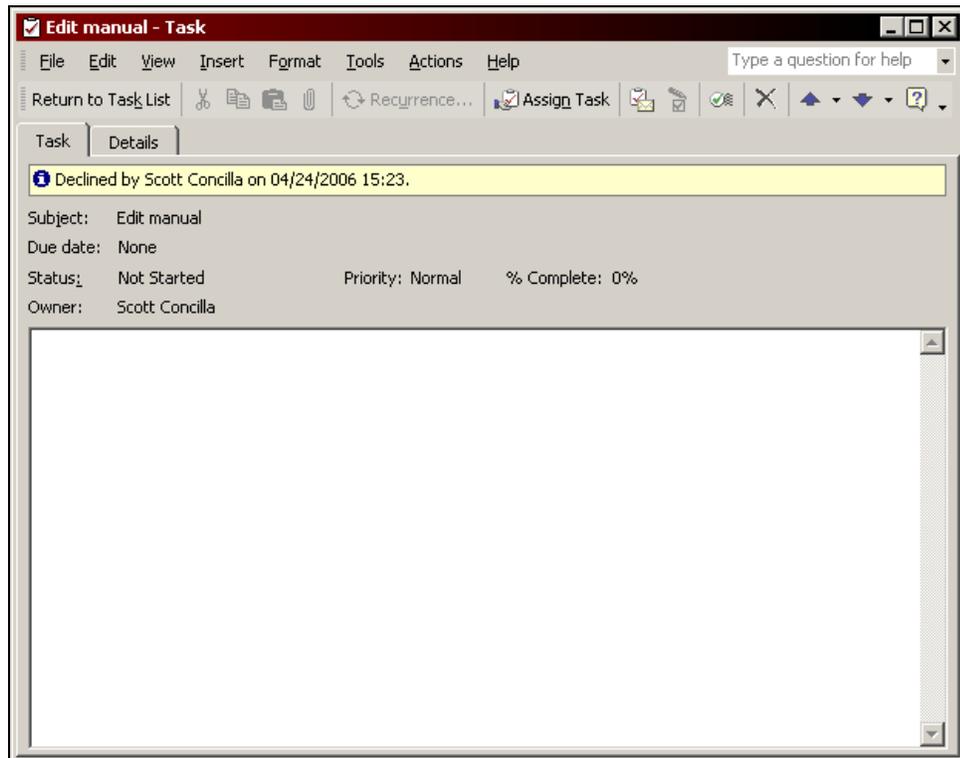
## Reclaiming Ownership of a Declined Task

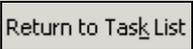
Tasks that are assigned may not always be accepted. When a **Task Declined** notice is received, there are two choices: assign the task to someone else or reclaim ownership of the task.



### Procedure:

1.  Open the **Task Declined** notice in the Inbox.



2.  Click **Return to Task List** to reclaim ownership of the task. Outlook will place the task in the task list.

OR

-  Click **Assign Task** to assign the task to someone else. Outlook will display the task with the assignment fields and allow the task to be sent again.

# Chapter 3 – Assigning and Tracking Tasks

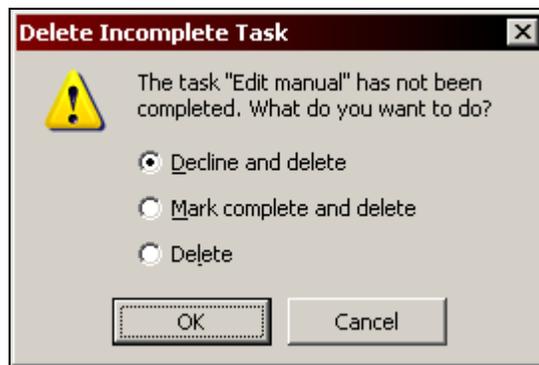
## Deleting an Incomplete Assigned Task

There may also be times when a task is initially accepted, but then later the assignee decides that they cannot or will not complete the task. The following procedure describes what happens when an assignee attempts to delete a task they have already accepted.



### Procedure:

1. Select the assigned task in the task list.
2. **Delete** the task from the list. Outlook displays the following dialog box:



3. The following table describes each option and the resulting action:

Option	Description
<b>Decline and delete</b>	Outlook sends a <b>Task Declined</b> notice to the assigner and deletes the task from the assignee's task list. The assigner may then reclaim ownership of the task or reassign it as described in the previous section.
<b>Mark complete and delete</b>	Outlook marks the task as complete, sends a <b>Task Completed</b> notice to the assigner, and deletes the task from the assignee's task list.
<b>Delete</b>	Outlook deletes the task from the assignee's task list and does not send any notification to the assigner.

4. Select the desired option and click **OK**.

# Chapter 3 – Assigning and Tracking Tasks

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## Tracking the Status of a Task

Outlook sends **Task Update** messages automatically when an assignee makes changes to a task and if the **Keep an updated copy** option was selected by the assigner.

When receiving a Task Update notification, Outlook updates the task on the task list when the Task Update e-mail has been read. Outlook then automatically deletes the Task Update message.

When the assignee marks the task as completed, Outlook automatically sends a **Task Completed** message if the **Send me a status report** option was selected by the assigner.

When the assigner receives and reads the Task Completed e-mail, Outlook marks the task as completed in the assigner's task list, but does not delete the task from the task list, nor is the Task Completed e-mail deleted from the Inbox.

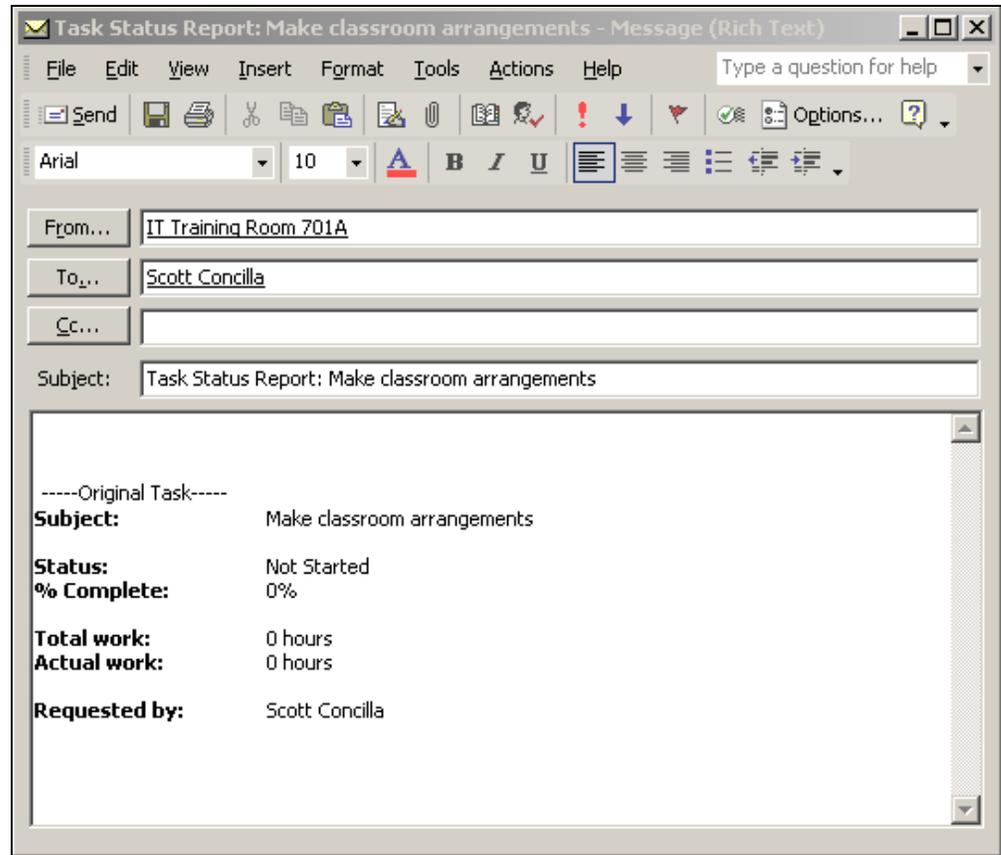
If the assigner has chosen not to keep an updated copy of the task on their task list, the assignee can send a **Status Report**.



### **Procedure:** (To send a Status Report)

1. **Open** the desired task in the task list.
2. Select the **Actions** menu of the task and choose **Send Status Report**. (Do not use the Outlook Action menu as it does not contain this option.) Outlook displays a **Task Status Report** e-mail:

## Chapter 3 – Assigning and Tracking Tasks



3. Write the status report and other important information in the message area.
4. Add any other additional e-mail options as desired.
5.  Click **Send** on the e-mail toolbar when completed.



### Tip:

- The **Send Status Report** feature can also be used to send task update information to people who are outside of the original task assignment process. For instance, a project manager can send a Task Status Report to their project team so that all members of the team know what has been changed or updated on the task.

# Chapter 3 – Assigning and Tracking Tasks

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## Reassigning an Assigned Task to Another User

In the process of assigning tasks to other users, there may be occasions where a task needs to be reassigned or "passed on down" to another user.

For instance, a department vice president assigns tasks to his managers, who then in turn assign those tasks to their staff.

When the task assignment procedure is followed, all assigners and assignees in the chain can receive task updates and notifications when the task is completed.

These procedures have already been document in this chapter, so the following example explains what happens when Vice President A assigns a task to Manager B, who then assigns that same task to Staff Person C.

This example also assumes that the **Keep an updated copy** and the **Send me a status report** options have been selected when the task was created and assigned.



### Procedure:

1. Vice President A creates a task and assigns it to Manager B.
2. Manager B receives the Task Request e-mail and accepts the task. The task now appears on Manager B's task list. The Task Request e-mail disappears from Manager B's Inbox.
3. Vice President A receives a Task Accepted e-mail from Manager B. When Vice President A reads the Task Accepted e-mail, the task is updated in the task list and the Task Accepted e-mail disappears from the Inbox.
4. Manager B opens the task in the task list, clicks Assign Task, and assigns it to Staff Person C.
5. Vice President A receives a Task Update e-mail from Manager B. Vice President A reads the Task Update e-mail, the task is updated in their task list, and the Task Update e-mail disappears from the Inbox.

## Chapter 3 – Assigning and Tracking Tasks

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6. At the same time as step 5, Staff Person C receives a Task Request e-mail and accepts the task. The task now appears on Staff Person C's task list. The Task Request e-mail disappears from Staff Person C's Inbox.
7. Manager B receives a Task Accepted e-mail from Staff Person C. When Manager B reads the Task Accepted e-mail, the task is updated in the task list of Manager B and the Task Accepted e-mail disappears from Manager B's Inbox. Vice President A does not receive any notification that the task has been accepted by Staff Person C.
8. Any time Staff Person C updates the task in their list, both Vice President A and Manager B will receive Task Update e-mails from Staff Person C. When both A and B read the Task Update e-mails, the respective task lists are updated and the Task Update e-mails disappear from the Inbox.
9. When Staff Person C marks the task as completed, both Vice President A and Manager B receive Task Update e-mails and Task Completed e-mails. The Task Update e-mails will disappear from the Inbox once read, however, the Task Completed e-mails will remain.



### Tips:

- **Task Update** e-mails will always be automatically deleted from the Inbox, however, when this occurs can vary. In some cases, the Task Update e-mail may disappear before it has been read. Note however, that the update information is added to the task, and Outlook will mark the task as "new/unread" in the task list.
- **Task Accepted** and **Task Declined** e-mails will always stay in the Inbox until they are read, but will disappear automatically once they have been read.
- **Task Completed** e-mails will always stay in the Inbox even once they are read.
- For complete information on what happens to each task e-mail for assigners and assignees, see **Appendix C – Task E-mails**.

# Chapter 3 – Assigning and Tracking Tasks

## Forwarding a Task

To send a copy of a task to someone else without “assigning” it to them, simply create it as you would a new task for yourself, and then perform the following actions.



### Procedure:

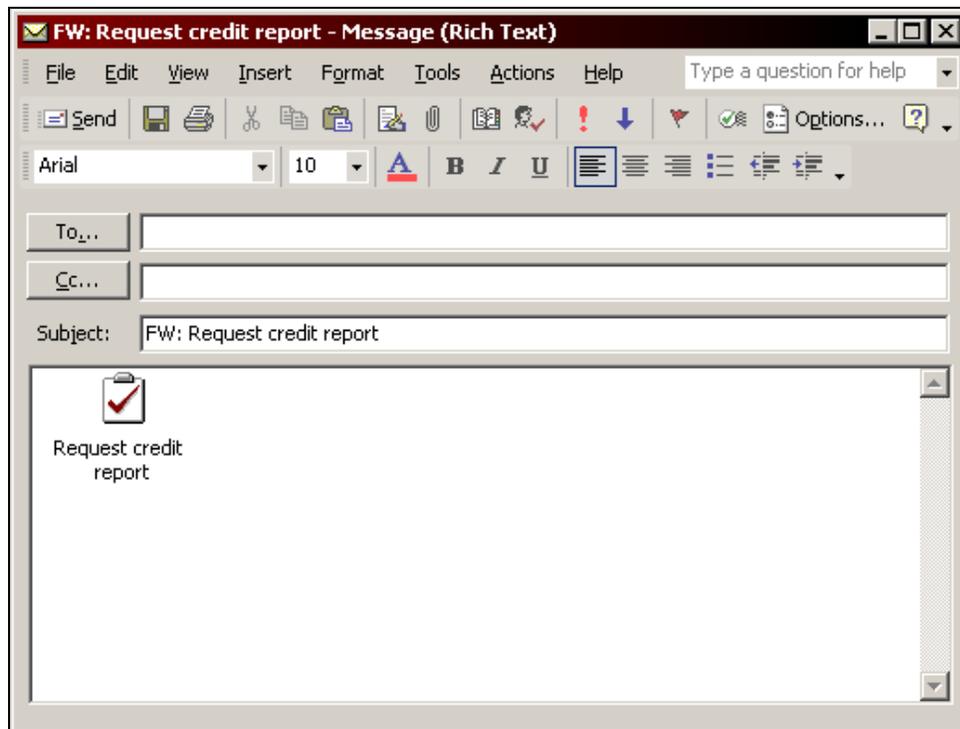
1. In the task list select the task to be forwarded.
2. *Right-click* the task and choose **Forward**.

OR

Select the **Actions** menu (either from Outlook or on the Task) and choose **Forward**.

OR

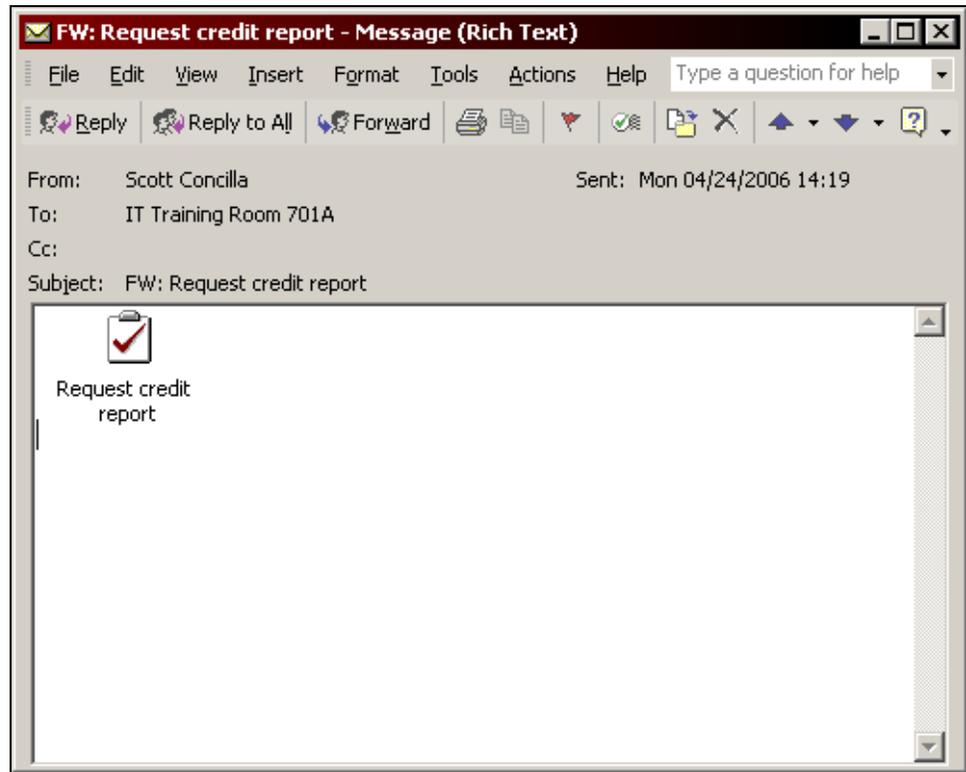
Press **[Ctrl] + [F]**. A new e-mail message is created with the task included as an attachment.



3. Address the e-mail, add any options as necessary, and click **Send**.

## Chapter 3 – Assigning and Tracking Tasks

- The message appears in the Inbox of the recipient with the forwarded task represented by an icon.



- The recipient can drag the task icon that appears in the message to the Tasks icon on the Outlook bar or to the Tasks folder in the folder list. The task will now appear in the user's task list.



# Appendix A

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## Toolbars



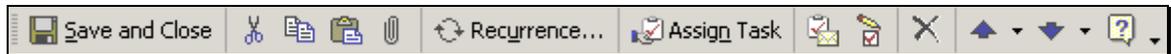
## Outlook Tasks Folder Toolbar (Standard)

This is the standard toolbar that appears in the Outlook interface when the Tasks folder is selected.



## Individual Task Toolbar (Standard)

This is the standard toolbar that appears when an individual task is being created or is opened.



## Assigned Tasks Toolbars (Tasks Folder)

This toolbar appears when a task is being created to be assigned to another user.



This toolbar appears on a task that has been assigned to the user by another user.



This toolbar appears on a task that the user has assigned to someone else.



# Appendix A – Toolbars

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## Assigned Tasks Toolbars (Inbox)

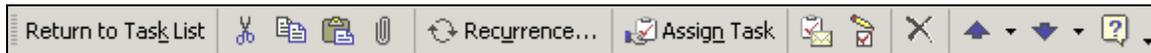
This toolbar appears on a **Task Request** e-mail when a task is assigned to the user.



This toolbar appears on **Task Accepted** or **Task Update** e-mails received by the user.



This toolbar appears on a **Task Declined** notice e-mail.



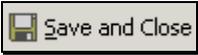
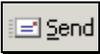
# Appendix A – Toolbars

## Tasks Toolbar Buttons

The following table lists alphabetically all of the toolbar buttons found on the task toolbars as shown in this appendix and a description of their function.

Button	Name	Function
 Accept	<b>Accept</b>	Accepts the task and places it on the task list. A <b>Task Accepted</b> notice is e-mailed to the assigner.
	<b>Address Book</b>	Opens the Outlook address book.
 Assign Task	<b>Assign Task</b>	Displays the <b>To</b> field and other options so that the task can be e-mailed (assigned) to another user(s).
 Cancel Assignment	<b>Cancel Assignment</b>	Removes the <b>To</b> field and other options from the task.
	<b>Check Names</b>	Validates the names in the <b>To</b> field against the Global Address List.
	<b>Copy</b>	Copies the selected task to the clipboard
	<b>Cut</b>	Deletes the selected task from its original location and copies it to the clipboard.
	<b>Decline</b>	Declines the task. A <b>Task Declined</b> notice is e-mailed to the assigner.
	<b>Delete</b>	Deletes the selected task. (The task is moved to the Deleted Items folder.)
	<b>Find</b>	Toggle button for the Find Bar to search the Tasks folder.
	<b>Find a Contact</b>	Type a name in this box to have Outlook search the Contacts folder for a match.
	<b>Help</b>	Opens the online help system.

## Appendix A – Toolbars

Button	Name	Function
	<b>Insert File</b>	Allows the user to attach documents to the task. The attachment icon(s) will be placed in the Notes area of the task.
	<b>Mark Complete</b>	Marks a task as complete.
	<b>Move to Folder</b>	Opens a submenu to place the item in a different Outlook folder.
	<b>New Task</b>	Opens a new task window.
	<b>Next Item</b>	Opens the next item in the task list.
	<b>Organize</b>	Opens the Organize pane with options for folders, categories, and views for tasks.
	<b>Paste</b>	Copies the item from the clipboard to the currently selected location.
	<b>Previous Item</b>	Opens the previous item in the task list.
	<b>Print</b>	Creates a hard copy of the currently selected task or task list.
	<b>Recurrence</b>	Opens the Recurrence dialog box to set the repetition pattern for the task.
	<b>Reply</b>	Creates an e-mail reply window.
	<b>Return to Task List</b>	Returns a declined task to the task list.
	<b>Save and Close</b>	Saves changes to the task and closes the task window.
	<b>Send</b>	Sends the task or status report to the chosen recipient(s).
	<b>Send Status Report</b>	Creates an e-mail to the task assigner with the task details and notes.

# Appendix B

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## Symbols and Icons



## Appendix B – Symbols and Icons

There are several types of symbols that can appear within the Task views. These icons are described in the following table:

Symbol	Description
	Outlook Task folder icon
	Task
	Recurring task
	Task assigned to current user
	Task assigned to another person
	Completed task
	Uncompleted task
	Task has an attachment
	High importance task
	Low importance task
	Task has a reminder
	Task Request/Update notification (Inbox)
	Task Accepted notification (Inbox)
	Task Declined notification (Inbox)
	Awaiting reply to task (Task list)
	Task has been accepted (Task list)
	Task has been declined (Task list)



# Appendix C

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## Task E-mails



## Appendix C – Task E-mails

In the process of assigning tasks to other users and receiving assigned tasks, there are several types of e-mails that are sent by Outlook. The following table describes each e-mail type, its associated icon, and what happens to the e-mails and associated tasks.

Task E-mail	Icon	Action
<b>Task Request</b>		<p>Assigner: Copy of Task Request e-mail is in Sent Items folder.</p> <p>Assignee: Receives Task Request e-mail; disappears once read.</p>
<b>Task Accepted</b>		<p>Assigner: Receives Task Accepted e-mail; disappears once read; updates task in list.</p> <p>Assignee: Copy of Task Accepted e-mail is in Sent Items folder; task is marked as accepted.</p>
<b>Task Declined</b>		<p>Assigner: Receives Task Declined e-mail; disappears once read, task remains on list.</p> <p>Assignee: Copy of Task Declined e-mail is in Sent Items folder; no changes to task list.</p>
<b>Task Update</b>		<p>Assigner: Receives Task Update e-mail; disappears once read and updates task in list, or, disappears on its own and marks task as new/unread.</p> <p>Assignee: Copy of Task Update e-mail is in Sent Items folder; task is marked with latest update date.</p>
<b>Task Status Report</b>		<p>Assigner/anyone: Receives Task Status Report e-mail; e-mail stays in Inbox; task is NOT updated.</p> <p>Assignee: Copy of Task Status Report is in Sent Items folder; task is NOT marked with the latest update date.</p>
<b>Task Completed</b>		<p>Assigner: Receives Task Completed e-mail; e-mail stays in Inbox; task is marked as completed in list.</p> <p>Assignee: Copy of Task Completed notice is in Sent Items folder; task is marked as completed in list.</p>



# Index

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<b>A</b>	
Assigning .....	49
Accept .....	52
Cancel assignment.....	51
Decline .....	52
Reassigning.....	58
Reclaiming ownership .....	54
<b>C</b>	
Cancel Assignment.....	51
Categories .....	5
Add new .....	38, 44
Assigning.....	37
Changing assignments.....	39
Changing existing.....	40
Deleting .....	40, 45
Master category list .....	44
Searching .....	41
Viewing tasks by.....	43
Completing.....	9
Creating	
New task.....	3
Recurring tasks .....	12
Task order .....	20
<b>D</b>	
Deleting	
Categories .....	40
Incomplete assigned task.....	55
Recurring tasks .....	16
Tasks.....	11
Details Tab.....	7
<b>E</b>	
Editing	
Tasks .....	6
E-mails	
Forwarded task.....	60
Task completed .....	50, 55, 56, 59
Task declined.....	54, 55
Task request .....	52
Task status report .....	56
Task update .....	50, 56, 59
Exporting .....	30
Copy and paste .....	30
Import and Export Wizard .....	32
<b>F</b>	
Forwarding .....	60
<b>I</b>	
Import and Export Wizard.....	32
<b>M</b>	
Mark as Complete .....	9
Master Category List	
Customizing .....	44
Resetting .....	45
<b>O</b>	
Options .....	26
Outlook Today .....	28
<b>P</b>	
Percent Complete.....	5, 6, 8, 9
Printing .....	23
Memo style.....	24
Table style.....	23
<b>R</b>	
Reassigning.....	58
Receiving	
Assigned tasks .....	52
Recurring Tasks	
Creating.....	12
Deleting .....	16
Options.....	13
Pattern.....	13
Range of recurrence .....	14

# Index

---

Skipping occurrence.....	15
Reminders .....	5, 27
Default time .....	26
Dismissing .....	10
Restoring .....	11

## S

Skip Occurrence .....	15
Status Report.....	50, 51, 56

## T

Tables	
Incomplete assigned tasks.....	55
Outlook today options.....	29
Recurring tasks options.....	13
Task details fields.....	8
Task e-mails .....	75
Task fields .....	5
Task icons .....	71

Task options.....	27
Task toolbar buttons .....	67
Task views .....	18
Task Colors .....	27
Task Details.....	7
Task Order.....	20
Task Views .....	17
Tracking.....	56

## V

Viewing	
Tasks by category.....	18, 43
Views.....	17
Filtered .....	17, 19
Grouped .....	17, 43
Sorting.....	19

## W

Work .....	8
------------	---