

ASSIGNING AND TRACKING TASKS

With Outlook, it is possible to create a Task and then assign it to another person for completion. When a Task is assigned to another person, only that person can update the Task. However, it is possible to keep a copy of the Task in your Tasks list. When the Task is updated by the other person, it will also be updated on your Task list. It is also possible to specify that you want to receive status reports for the Task. Status reports are special e-mail messages that reflect the current status of a task.

Assigning the Task

- ✦ Click **Tasks** in the **Navigation Pane**.
- ✦ Click the **New Tasks** button on the toolbar.
- ✦ The **Untitled - Task** window will appear (see illustration below).

- ✦ Input the information for the Task, such as the Subject, the Due Date, and the Start Date.
- ✦ Click the **Task Tab**, if necessary.
- ✦ In the **Manage Task Group**, click the **Assign Task** button.
- ✦ The **Task** window will be updated to include a **To** box (see illustration below).

- ✚ In the **To** box, do one of the following:
 - ✦ Input an e-mail address for the person to whom the Task is to be assigned.
 - ✦ Click the **To** button to open the **Select Task Recipient** dialog box and then search for the person to whom the Task is to be assigned.
 - ✦ Input the full name for the person and then click the **Check Names** button in the **Manage Task Group**.
- ✚ The **Keep an updated copy of this task on my task list** is selected.
- ✚ If you don't want to keep a copy of the Task, click the check box to de-select it.
- ✚ The **Send me a status report when this task is complete** is also selected.
- ✚ Once again, click the check box to remove the check mark and de-select this option.
- ✚ In the **Comment** area, type a message to describe what is to be done with this Task.
- ✚ Click the **Send** button to send the Task to the other person.
- ✚ A message may appear notifying you that the Task Reminder has been turned off.
- ✚ Click **OK**, unless you want a reminder about the due date of this Task.
- ✚ The Task Request is sent.

NOTE:

- ✚ A reminder will be sent when the assignee accepts or declines the Task.
- ✚ If a Task is assigned to more than one person, it is not possible to keep a copy of the Task in your Task List.
- ✚ To be able to keep track of Tasks assigned to more than one person:
 - ✦ Create duplicate Tasks.
 - ✦ Assign each Task to one person.

Viewing Tasks Assigned to Others

- ✚ Click **View** on the **Menu Bar**.
- ✚ Point to **Current View**.
- ✚ Click **Assignment** in this list.
 - ✦ The Tasks folder will show only the Tasks that have been assigned to others.
 - ✦ The Subject, Owner, Due Date, Status, and In Folder columns are shown.
 - ✦ The **Folder Banner** indicates that the Tasks are filtered.
- ✚ In the **Tasks** list, double-click the Task assigned to the other person to open it.
- ✚ Click the **Details** button in the **Show Group**.
 - ✦ The Details tab is displayed.
 - ✦ As work on the Task progresses, any work-related information will be displayed in the header on this tab.
 - ✦ The same is true as the work is completed.
- ✚ Do one of the following:
 - ✦ Click the **Office Button** and choose **Close**.
 - ✦ Click the **Close** button in the upper-right corner of the **Task** window.
- ✚ The **Tasks** window will close.
- ✚ The **Tasks** list will display.