

Outlook 2021

Intermediate

[Your Company Name]

CustomGuide
Interactive Training

EVALUATION ONLY

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Tasks and Notes

Even if you're not the most organized person, you probably scrawl a to-do list on a piece of paper once in a while to help you remember everything that you have to do. The problem with paper to-do lists is that they're easy to misplace and often not in front of you when you need them most.

Creating and completing tasks in Outlook is better for keeping organized than writing them on paper. Outlook Tasks and To-Do Lists are much more difficult to misplace and are always accessible and organized when you need to get to work on the tasks at hand.

Objectives

Follow Up with Emails

Create and Complete Tasks

View Tasks

Recurring Tasks

Assign Tasks

Create and Organize Notes

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Follow Up with Emails

You can flag emails to create tasks that remind you to follow up with them. When you flag an item, a flag icon appears next to it, and a task is added to your To-Do List.

Flag a Message

1. Select a message.

   Tip: You can also flag contacts, notes, and tasks.

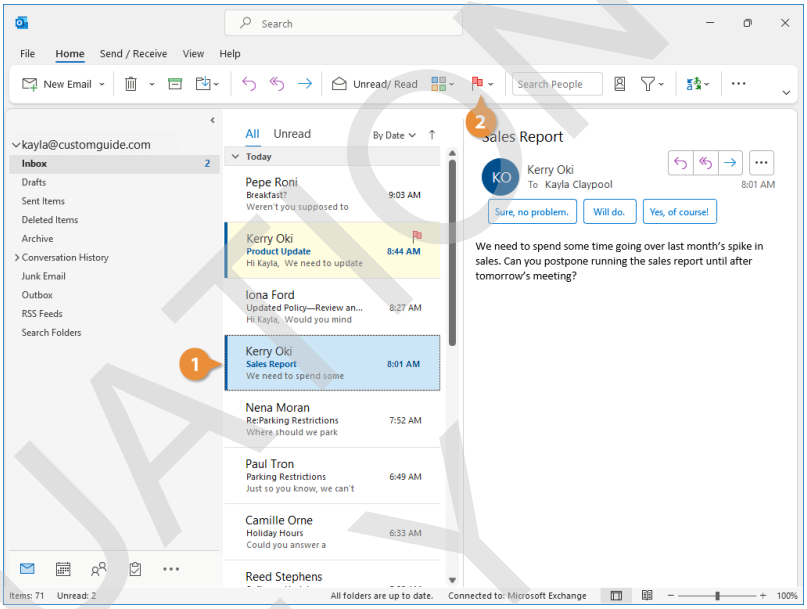
2. Click the **Follow Up** button.

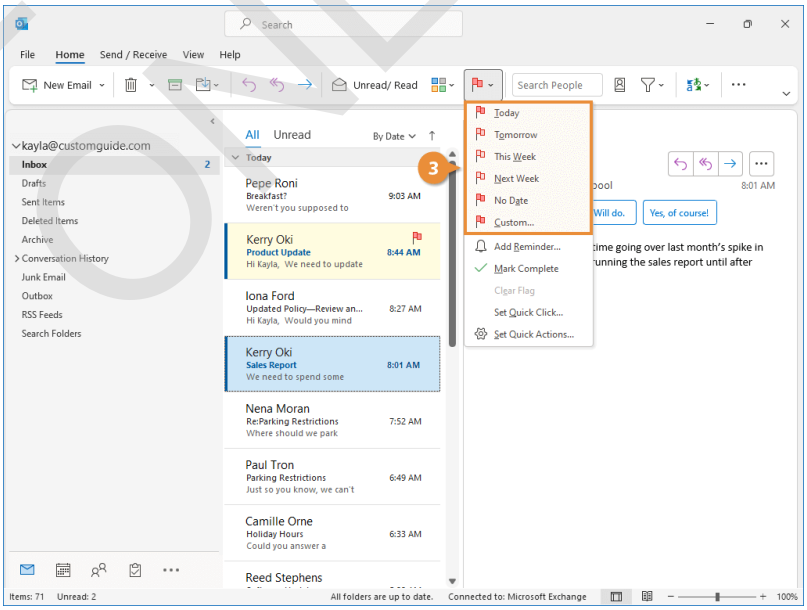
   This menu lets you choose when you want the task to be due. You can choose one of the options, opt for no due date, or set a custom due date.

3. Select a flag.

A flag icon appears over the email, indicating that a corresponding item has been created in your To-Do List.

Shortcut: When hovering your mouse over an email, click the flag icon to assign the Today flag.





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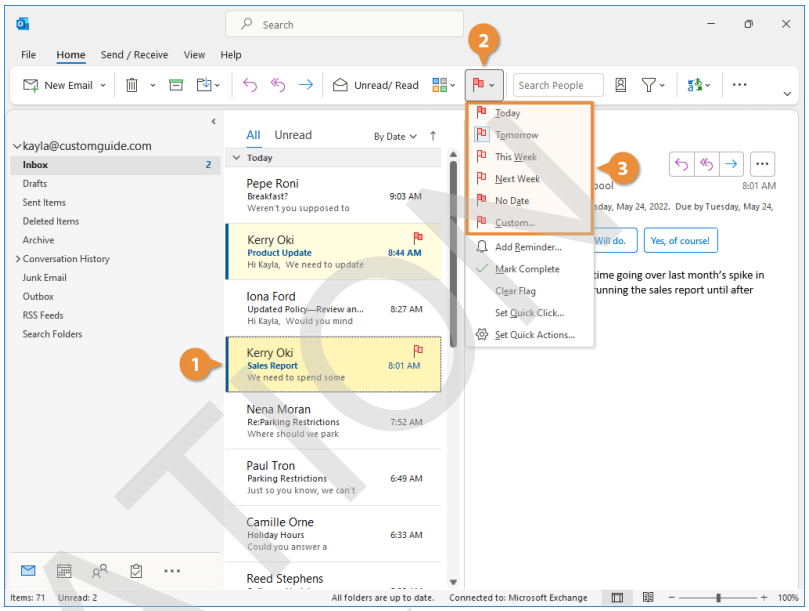
Change Flags

Once an item has been flagged for follow up, you can easily change it to another flag.

1. Select a message.
2. Click the **Follow Up** button.
3. Select a different flag.

The due date is changed.

Shortcut: Right-click the flag on the email and select a new flag from the menu.

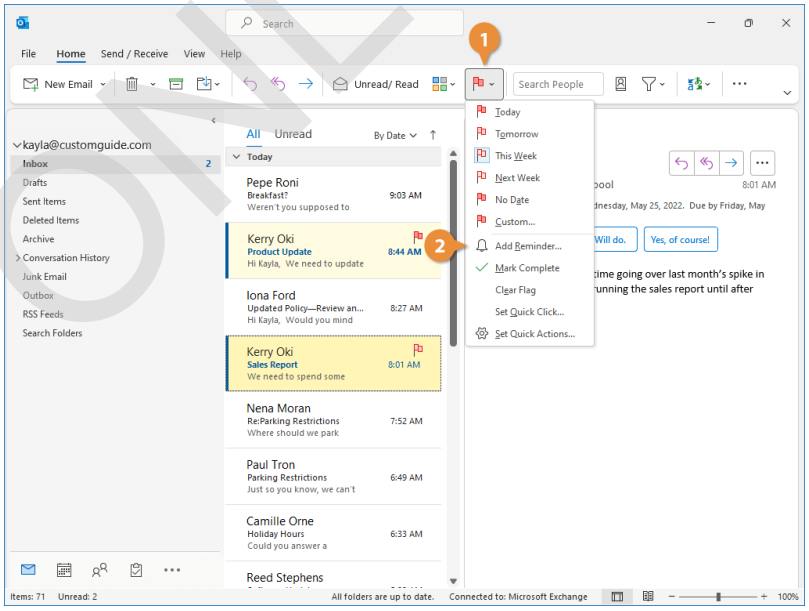


Set a Reminder Date

If a visual flag icon isn't enough, you can add an audio reminder and alert message.

1. Click the **Follow Up** button.
2. Select **Add Reminder**.

   The Custom dialog box opens. From here, you can add a reminder, as well as change the Start and Due dates for the task.

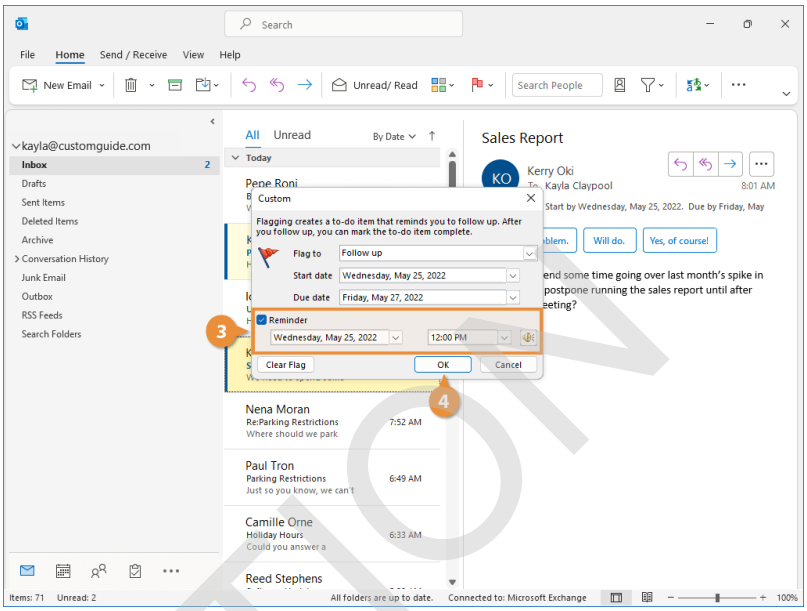


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3. Choose a date, time, and sound in the Reminder section.
4. Click **OK**.

A reminder is set, indicated by a bell icon appearing on the selected item.

Tip: When the reminder alert appears, you can request another reminder, or click the **Dismiss** button.

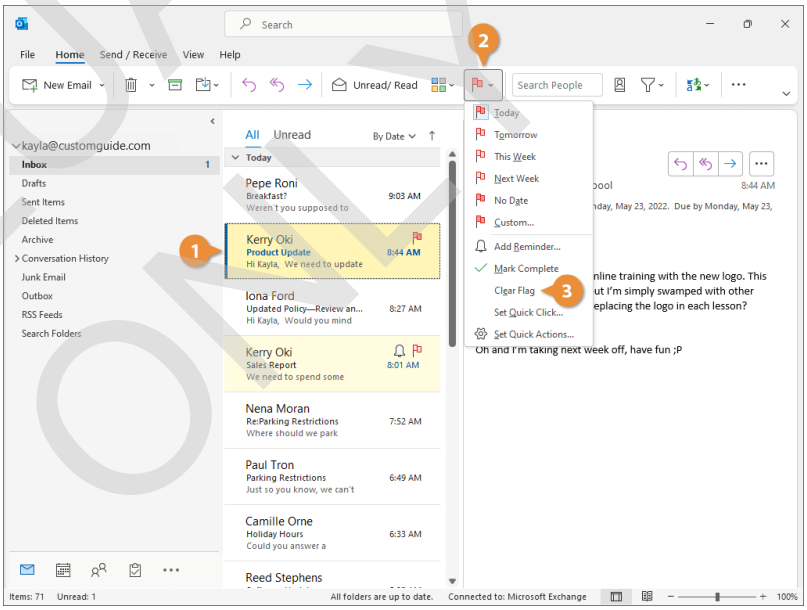


Remove a Flag

If you realize that you don't need a task or reminder to follow up on an email, just remove the flag.

1. Select a flagged item.
2. Click the **Follow Up** button.
3. Select **Clear Flag**.

The flag icon is removed from the email and the corresponding task is deleted from your To-Do List.

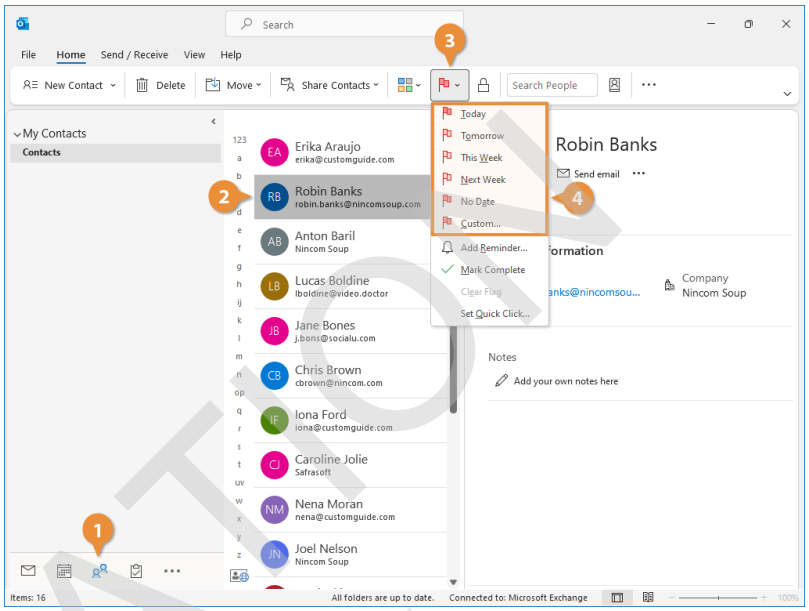


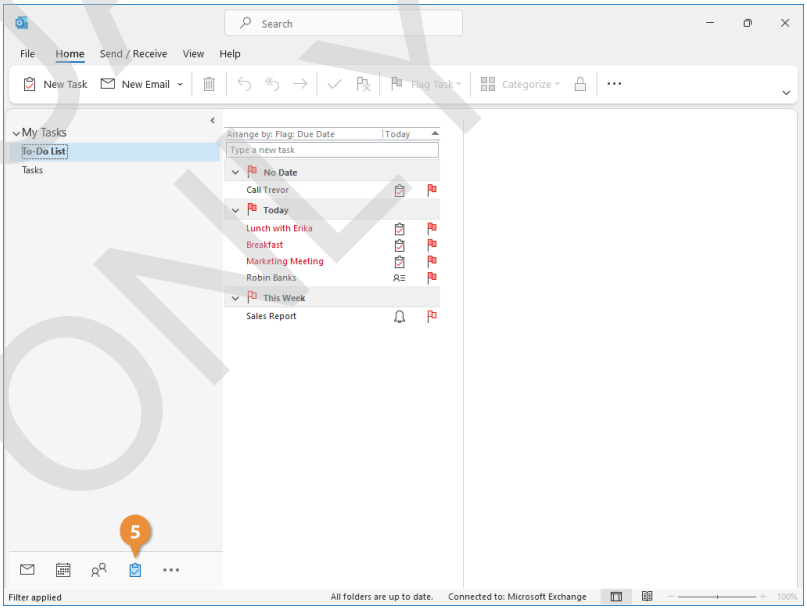
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Follow Up with People

You can also follow up with people, just as you would with email.

1. Click **People**.
2. Select a person.
3. Click **Follow Up**.
4. Choose a flag.
5. Click **Tasks**.





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Create and Complete Tasks

If you have something that you need to remember to do, but that isn't associated with a specific email or contact, you can create a standalone task.

Add a Task

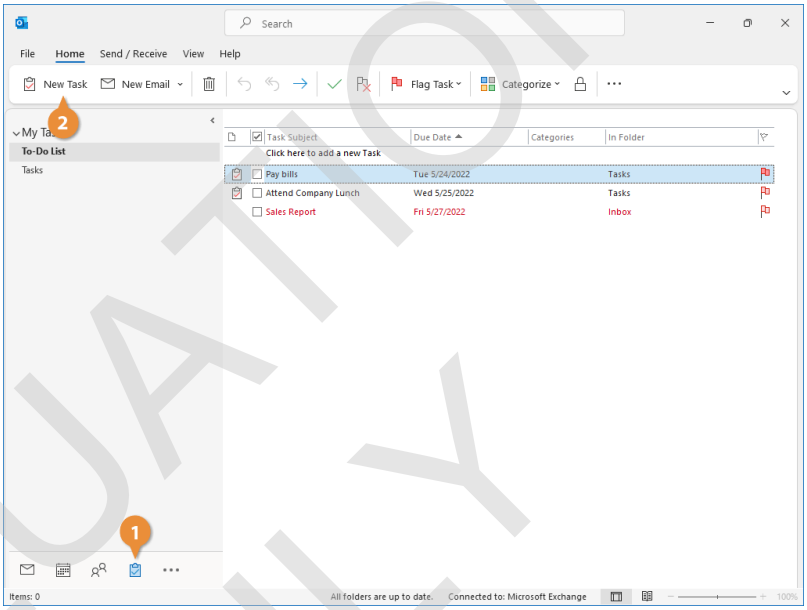
You can add new tasks from the Task view.

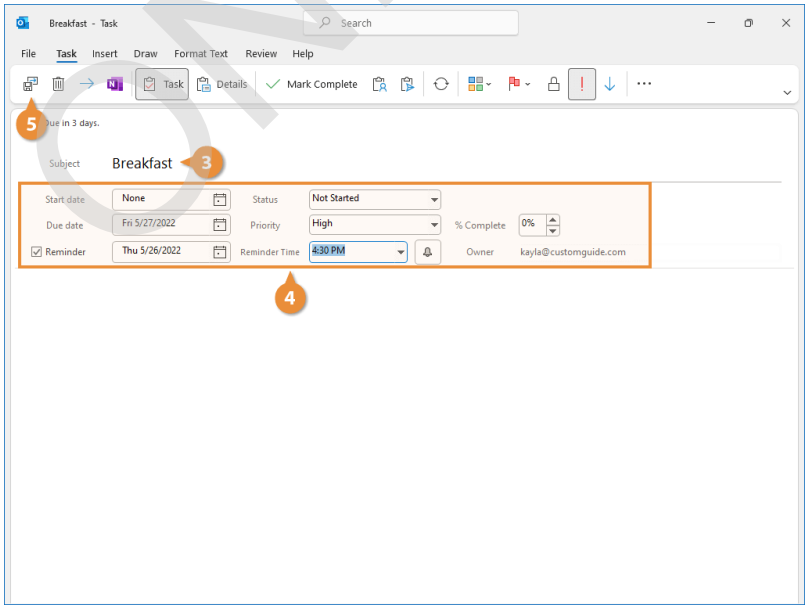
1. Click the **Tasks** button on the Navigation pane.
2. Click the **New Task** button on the ribbon.

   A new untitled task is created.

   Tip: The ribbon provides different options that you can use to make tasks more specific, such as flags, categories, or recurring items.
3. Enter a subject.
4. Enter task options.
   - Start date
   - Due date
   - Status
   - Priority
   - Percent Complete
   - Reminder

   Tip: Just like with an email, you can attach an item or file to the task from the Insert tab.
5. Click **Save & Close**.





The task is created.

Tip: You can create tasks from other views by clicking the **New Items** button and selecting **Task**.

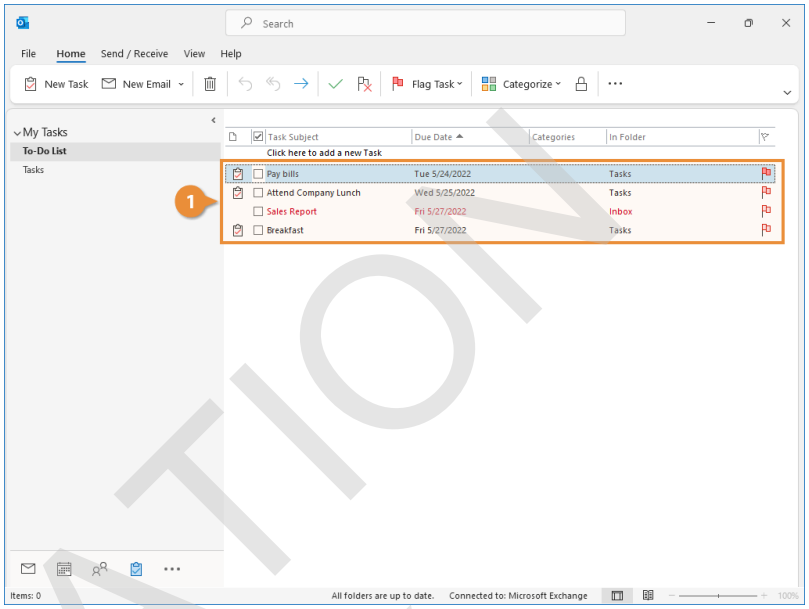
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Update a Task

Once you've created a task, you can edit or update it to show your progress.

1. Double-click the task that you want to update.

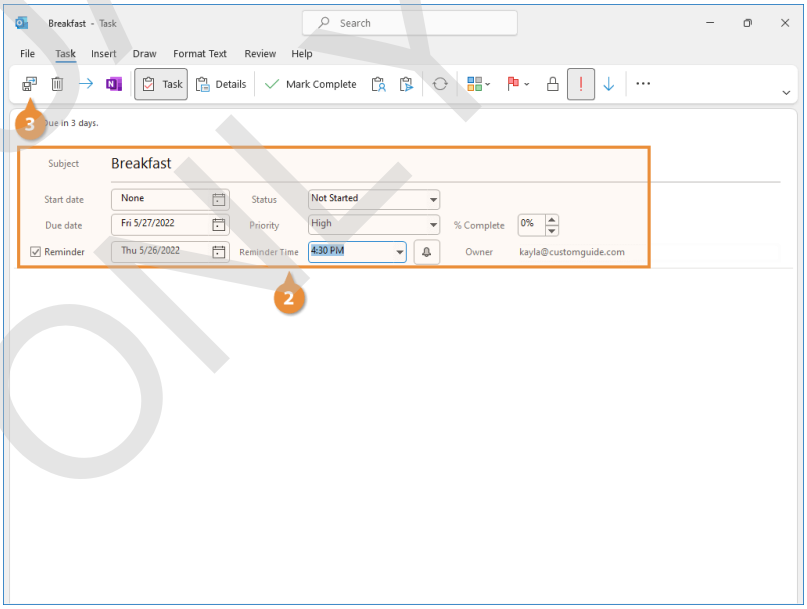
   The Task item window opens, where you can make changes to the task. You can do things like change the start or due date, select a new status or priority, or update the completion percentage.



2. Update the task's information using the available options.

   Tip: Remember, you can only enter start and completion dates and percentage of completion information in standalone Task items, not in email messages or contacts flagged as To-Do items.

3. Click the **Save & Close** button on the Task tab.



The task window closes, and the task is updated.

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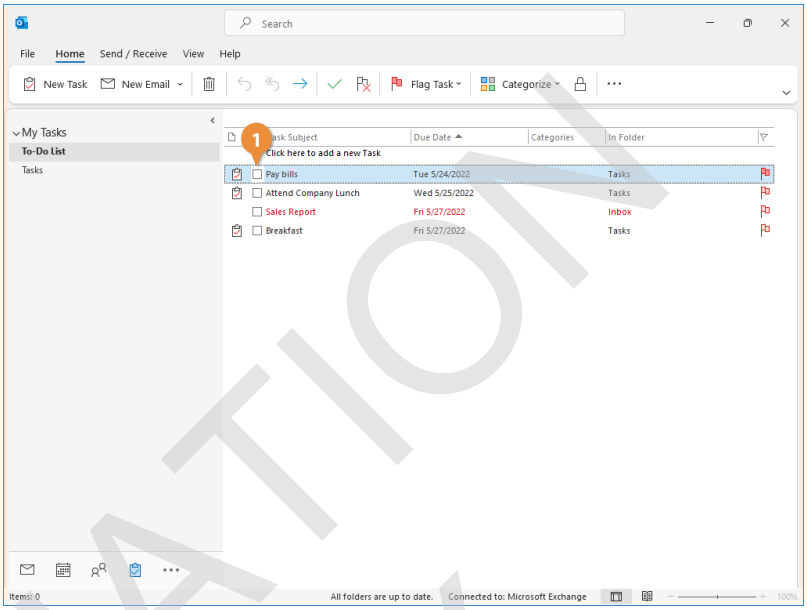
Mark as Complete

When you finish a task, you can check it off your Tasks list by marking it as complete. Completing a task will hide it from the To-Do list, or any other Task view that only displays active tasks.

1. Click the task's **check box**.

The task is completed, as indicated by a strikethrough and a check mark next to the task.

Tip: You can also select a task and click the **Mark Complete** button on the ribbon, or right-click a task and select **Mark Complete**.



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View Tasks

You can view tasks in several different ways in Outlook. In addition to Task view, you can enable the To-Do bar to keep track of tasks while in other views. You can also sort your tasks while in Task view.

View Task Lists

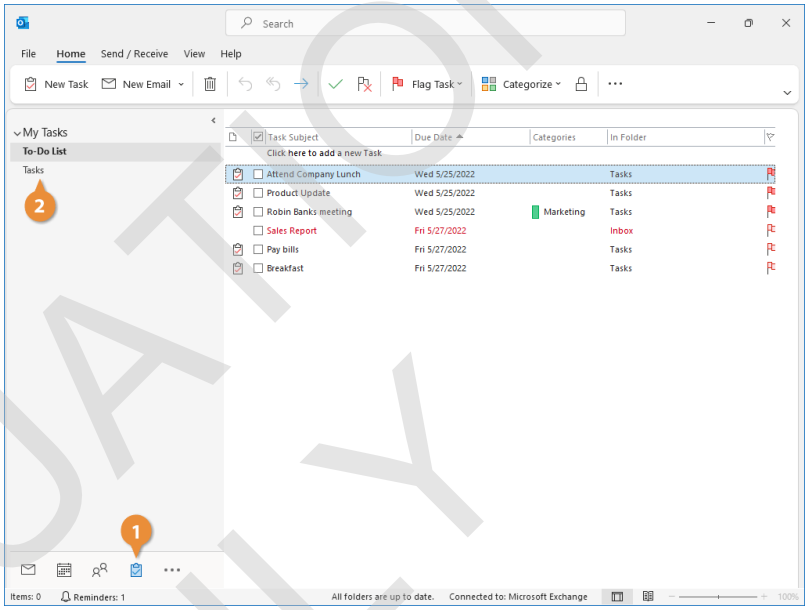
In the Tasks view, you'll find two separate lists of tasks: your To-Do list and your Tasks list.

1. Click the **Tasks** button on the navigation bar.

   In the Folder Pane, the My Tasks header will appear with two folders by default.

   - **To-Do List** will display your active tasks (those that haven't been completed), as well as all the flagged items from your Mail, Calendar, and Contacts.
   - **Tasks** will display all of your standalone tasks, active and completed. Flagged items from Mail, Calendar, and Contacts will not be shown here.

2. Click a task list from the Folder Pane.



The selected task list is displayed.

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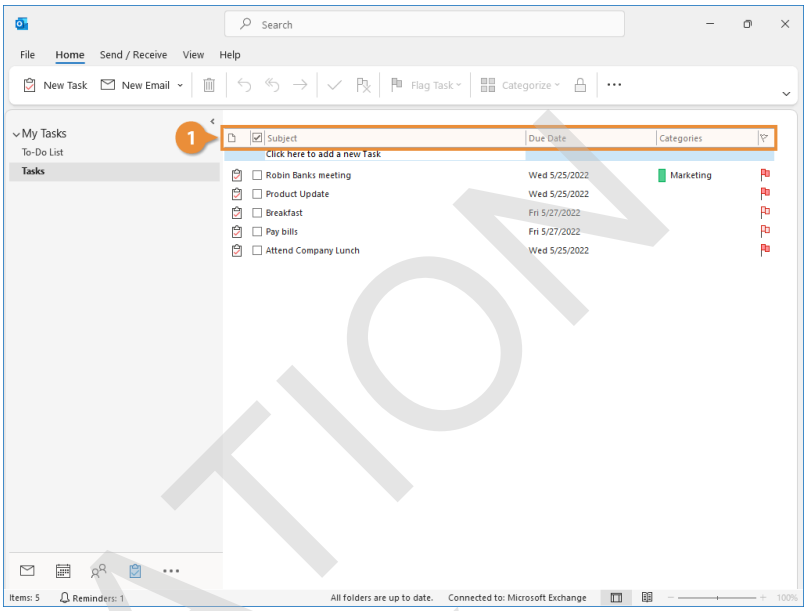
Sort Tasks

While viewing your tasks, you can sort them by several different categories.

1. Click a column header.

The tasks are sorted by the column that you selected.

Tip: Click the column header again to view the list in reverse order.



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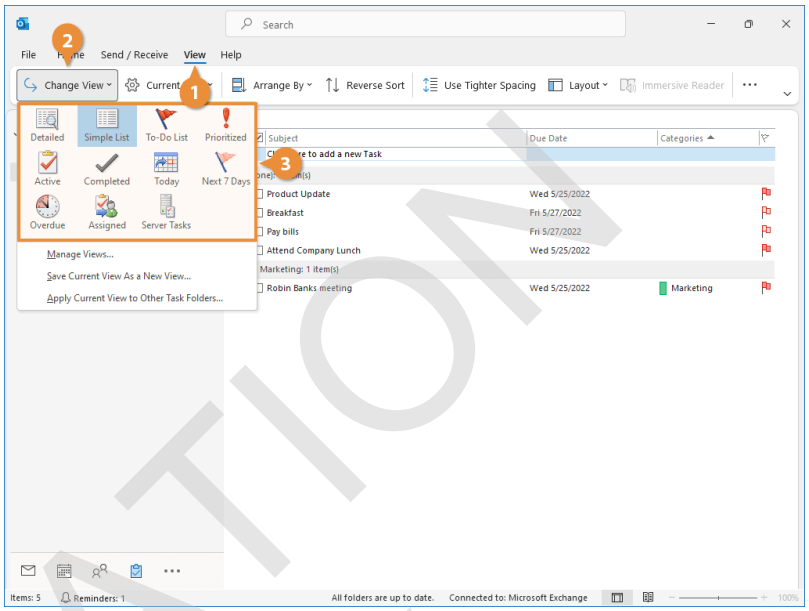
Change View

You can quickly filter out any tasks that you don't need to see by changing the current view.

1. Click the **View** tab on the ribbon.
2. Click the **Change View** button.

   Tip: If the Outlook window is big enough, the Change View button will be replaced with a Views gallery. Click the gallery's **More** button to expand it.

   Each of the different views will display task items by their relevant fields, such as only tasks that are prioritized, completed, or overdue.
3. Select a view.



The view is applied to the task list. The following table briefly describes some common Task views.

Task View Options			
Detailed	Displays all the details about each task.	**Today**	Displays a list of all tasks due today.
Simple List	Displays fewer details so you can see your tasks at a glance.	**Next 7 Days**	Displays tasks that are due in the next seven days.
To-Do List	Displays all tasks and to-do items with very little detail. Also displays the Reading Pane.	**Overdue**	Displays tasks that are overdue.
Prioritized	Displays a list of all tasks, in order of priority.	**Assigned**	Shows only the tasks that have been assigned to others, sorted by the task owner's name and due date.
Active	Displays all tasks that are incomplete.	**Server Tasks**	Displays a list of tasks stored on the server.
Completed	Lists all tasks that have been marked complete.		

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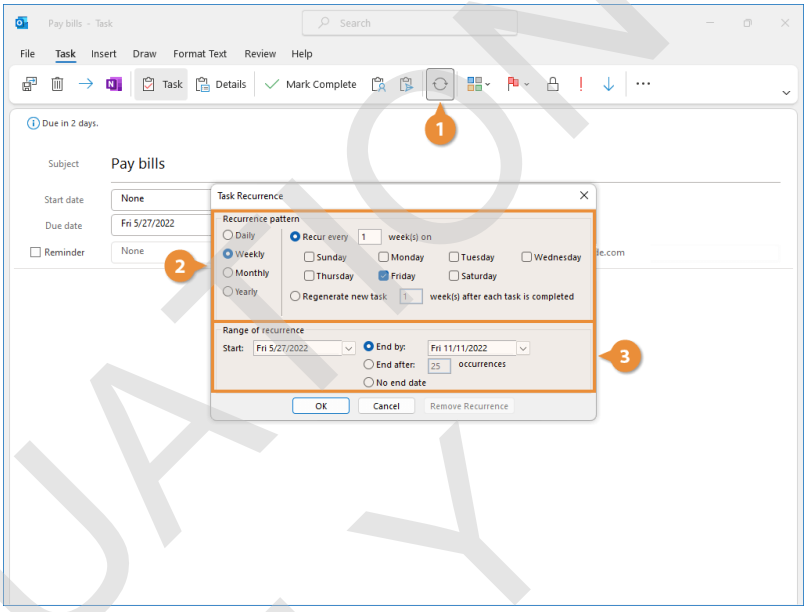
Recurring Tasks

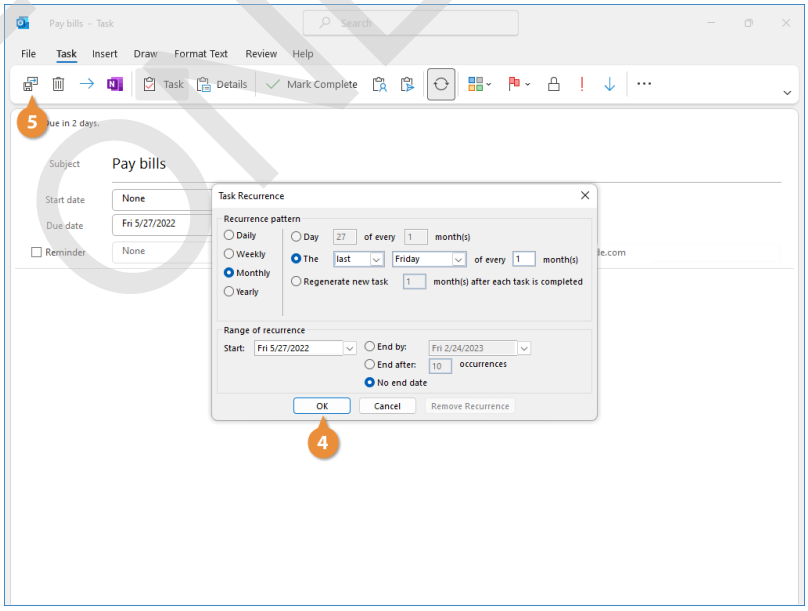
If you can foresee using the same task again and again, you can add a recurring task that will clone itself as you complete each occurrence.

Create a Recurring Task

1. In an open task window, click the **Recurrence** button on the Task tab.
2. Select a recurrence pattern and specify its parameters.
   - **Daily:** Tasks that recur every day or every workday.
   - **Weekly:** Tasks that recur on the same day(s) of the week, such as a report due every Friday or a payroll due every other Thursday.
   - **Monthly:** Tasks that recur on every month, such as an inventory audit that occurs on the 5th of every month.
   - **Yearly:** Tasks that recur annually, such as tax filing days.
3. Specify range of recurrence.

   You can also choose whether to allow a task to recur indefinitely, end after a certain number of recurrences, or end on a certain date.
4. Click **OK**.
5. Click **Save & Close**.





The recurring task is saved and appears in your To-Do list.

The recurring icon indicates that when this task is complete, a new instance will be created following the recurrence pattern.

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Tip: To stop the task from recurring, open the task, click the **Recurrence** button in the Recurrence group on the ribbon, and select **Remove Recurrence**.

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Assign Tasks

Assign a Task

If it's up to you to designate job responsibilities, you can use Outlook to assign tasks to other people.

1. In an open task window, click the **Assign Task** button on the Task tab.

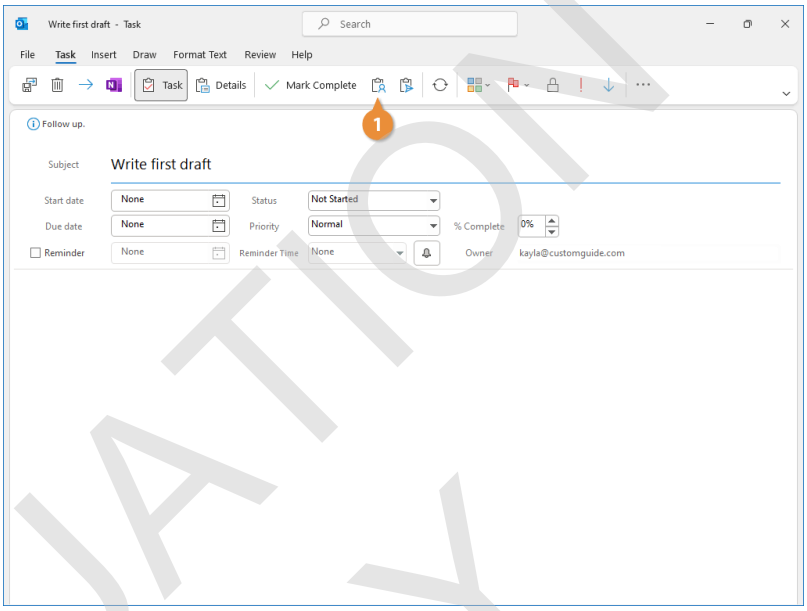
   The task window changes and now includes an address bar and a send button.

2. Enter the email address that you want to assign the task to in the **To** field.

   Tip: You can also click the **To...** button to open the Address Book, then select contacts there.

3. Select the assignment options.

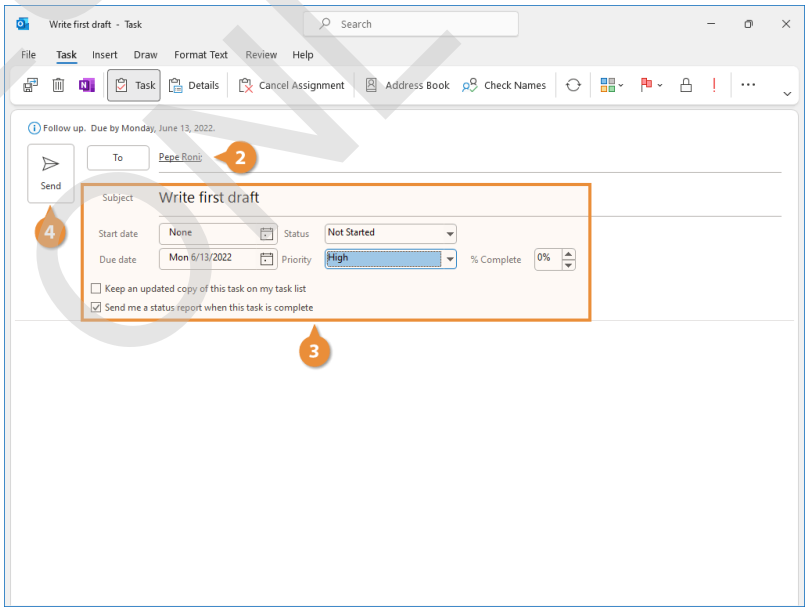
4. Click **Send**.



The task assignment is sent.

Tip: The task icon is updated to remind you that you've assigned it to someone else.

Shortcut: Click the **New Items** list arrow on the Home tab and select **Task Request**.



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Accept or Decline an Assigned Task

Task requests that are assigned to you appear in your Mail folder with a special task assignment icon.

1. Viewing your inbox in Mail view, select the task assignment request.

   In the preview pane, Accept and Decline buttons will appear above the message.

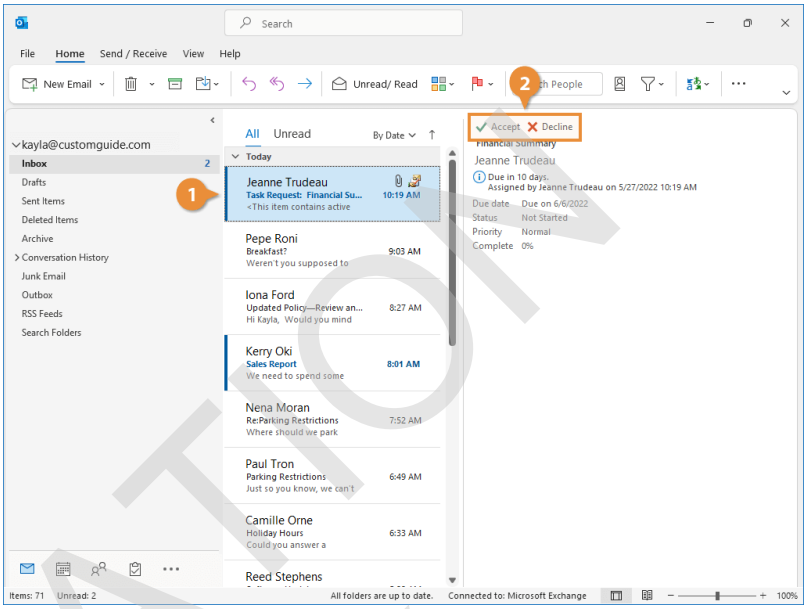
2. Click **Accept** or **Decline**.

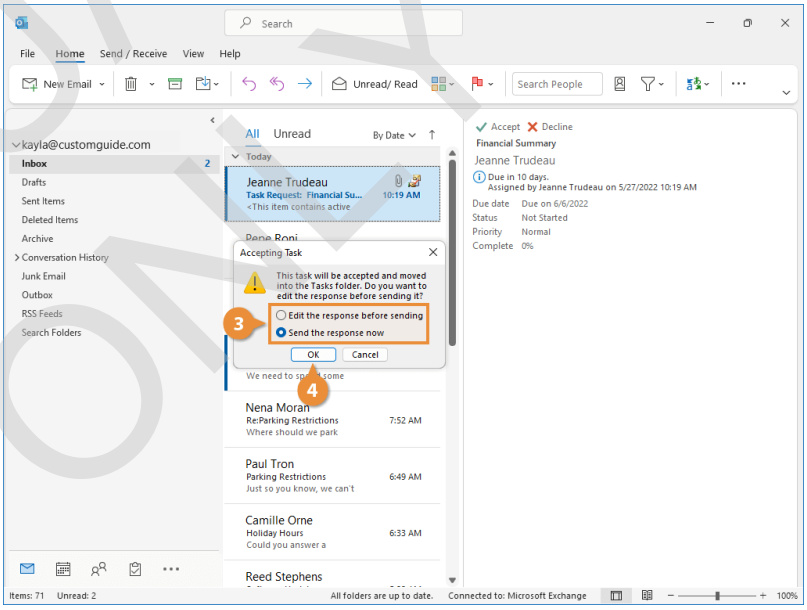
   A dialog box will ask how you want to reply to the request.

3. Choose how to respond to the request:

   - Edit the response before sending by adding a message to the response.
   - Send the response now without adding a message.

4. Click **OK**.





A response message is sent to the person who assigned the task to you. Accepted tasks appear in your Tasks folder.

Tip: Once you have accepted a task, you are able to reassign it to someone else using the **Assign** button, or simply send someone else a copy by using the **Forward** button.

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Create and Organize Notes

Outlook's Notes feature can help you keep track of short bits of information that you need to keep handy, such as a shipping address or directions to a meeting.

View Notes

Notes view is accessed from the Navigation Bar, but by default, it is hidden in a menu instead of shown alongside Mail, Calendar, People, and Tasks.

1. Click the **More (···)** button in the Navigation Bar.

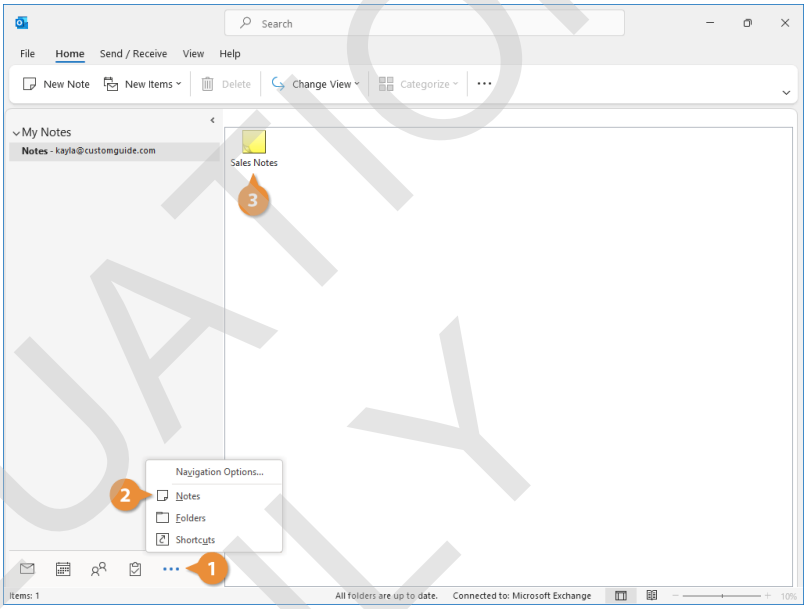
   This menu shows additional Navigation Bar options, including Notes view.

2. Select **Notes**.

   Notes view displays all the notes you've created.

3. Double-click a note to open it.

The note opens in a sticky note styled pop-up window.



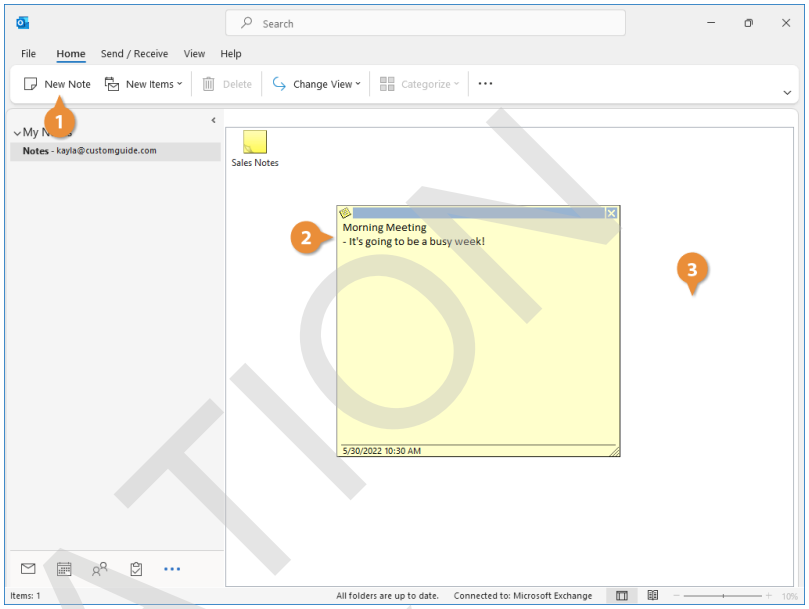
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Create a New Note

You can quickly create a new note to jot down anything you need to save.

1. While in Notes view, click the **New Note** button on the Home tab.
2. Start typing in the note pop-up.

   The first line of a note will be the name that appears as the note's Subject.
3. Click outside the note to save it.



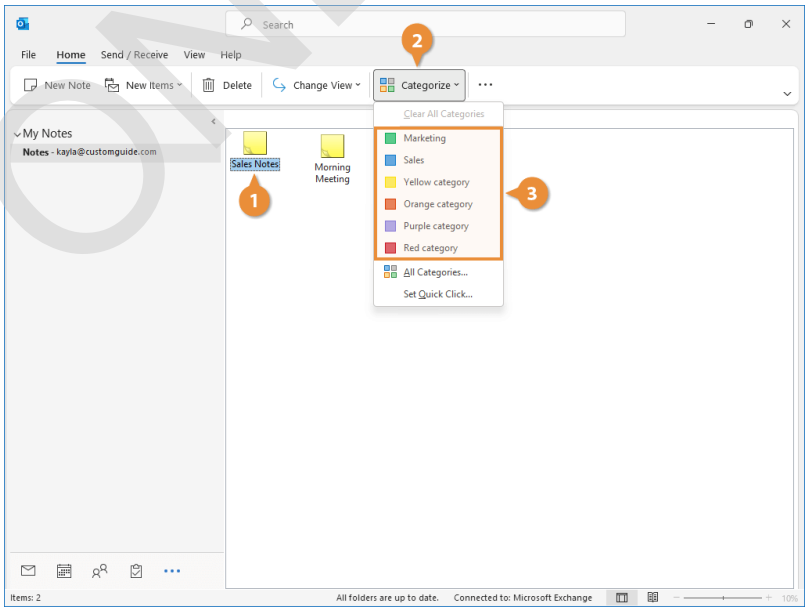
Notes are automatically saved as you type, so it's easy to quickly enter some information and move on.

Categorize a Note

You can assign categories to notes to help keep track of them and associate them with mail messages, contacts, and calendar events of the same category.

1. Select a note you want to categorize.
2. Click the **Categorize** button on the Home tab.
3. Select a category.

The selected category is applied to the note.

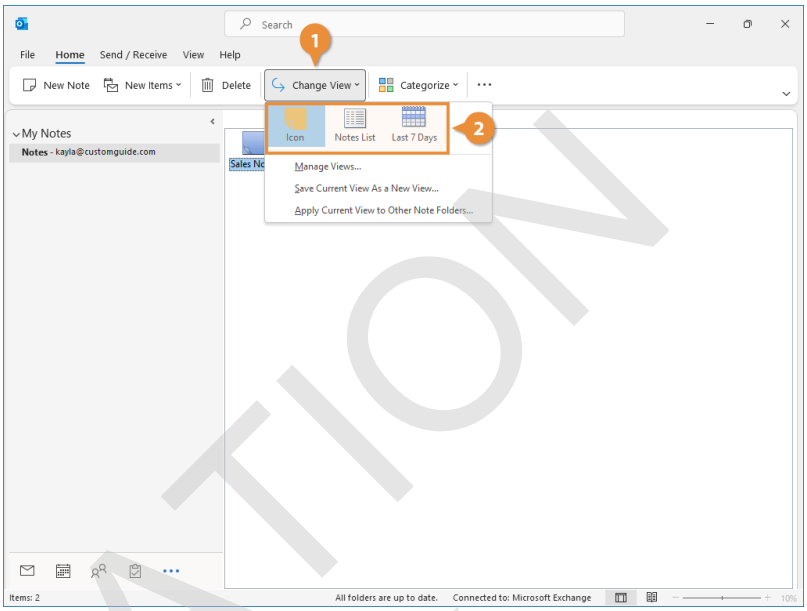


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Change the Note View

There are three views you can use to view your notes.

1. Click the **Change View** button on the Home tab.
2. Select a view option.
   - **Icon** view displays your notes as icons
   - **Notes List** displays notes in a list, with columns that show additional information.
   - **Last 7 Days** displays a list of only the notes created within the past 7 days.



The selected view is applied.

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