

A task is an item that you create in Outlook to track until its completion. A to-do item is any Outlook item — such as a task, an e-mail message, or a contact — that has been flagged for follow-up. By default, all tasks are flagged for follow-up when they are created, even if they have no start date or due date. Therefore, whenever you create a task, or flag an e-mail message or a contact, a to-do item is created automatically.

When you need to quickly indicate that an item requires your attention at a later time, flagging is the best option. When you flag an item, it is displayed with a flag in the Mail view, in Tasks, in the To-Do Bar, and in the Daily Task List in Calendar. Flagging a message or contact does not create a new task. Because the to-do item is still an e-mail message or contact after being flagged, you do not have the ability to assign it as a task to someone else, or indicate its progress or percentage of completeness.

A task can occur once or repeatedly. A [recurring](#) task can repeat at regular intervals, or it can repeat based on the date that you mark the task complete. For example, you can create a recurring task to send a status report to your manager on the last Friday of every month, or create a recurring task to get a haircut one month after your last one. Both tasks and to-do items appear in Tasks, in the To-Do-Bar, and in the Daily Task List in Calendar. No matter which view you are in, the To-Do Bar keeps you informed of your calendar, task, and to-do items.

There are several ways to create a new task in Outlook. You can use the **Task** command (click **New** on the **File** menu), enter a task in the **Type a new task** text box in the To-Do Bar from any view in Outlook, type in any blank space in the Daily Task List in Calendar, or click and type in the **Click here to add a new Task** text box at the top of Tasks view. Of these, the fastest way is to use the To-Do Bar.

You can also create a task by dragging an item, such as an e-mail message, to **Tasks** in the [Navigation Pane](#). A copy of the e-mail message is then created as a task.

Whether you track tasks that are assigned to yourself (such as reminders to respond to e-mail messages), or track tasks that are assigned to other people (such as the progress of someone's project), Outlook tasks are your solution. You can quickly add and update tasks, or mark them as complete. With tasks incorporated into the Calendar view, you have a rich interface for keeping track not only of your appointments, but of the tasks that you need to complete on a given day as well.

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Create a task from the File menu

1. On the **File** menu, point to **New**, and then click **Task**.

Keyboard shortcut To create a new task, press CTRL+SHIFT+K.

2. In the **Subject** box, type a name for the task.

NOTE You have now entered enough information to create a task. The following steps are optional, but will help you better manage your tasks in Outlook.


3. On the **Task** tab, in the **Actions** group, click **Save & Close** or continue with the following steps to customize your task.
4. If you want, set the **Start date** and the **Due date** for the task.

If you specify a Start date, the **Due date** field is automatically set to the same day. You can change the **Due date** field to any date that you want.

5. If you want to make the task recur, on the **Task** tab, in the **Options** group, click **Recurrence**.
6. In the **Task Recurrence** dialog box, click the frequency (**Daily, Weekly, Monthly** or **Yearly**) with which the task should recur, and then do one of the following:
 - **Make the task recur based on a regular interval** In the **Recurrence pattern** section, select the options for the frequency interval that you want. Do not select **Regenerate new task**, or the task will not recur at regular intervals.
 - **Make the task recur based on completion date** Select **Regenerate new task**, and in the box, type the amount of time after which a new task must be generated.

Each time that you mark the task complete, a new task will be created based on your specifications.

TIP This is your best choice when you do not want the next reminder for a task to appear until the previous one is marked as complete. If you do not mark the item complete, the next reminder will never appear. For example, if you have a reminder to pay your utility bill on the 15th of each month and you do not mark the occurrence on April 15th as complete, in May you will still see the not yet completed April 15th task. Only after you mark the April 15th task as complete does the May 15th occurrence of the task appear.

7. Click **OK** to close the **Task Recurrence** dialog box.
8. If you want to add a reminder alert, select the **Reminder** check box, and then enter the date and time for the reminder.
9. You can specify a custom sound to be played with your reminder. Click , click **Browse**, select the sound file to play, click **Open**, and then click **OK**. This changes the reminder sound only for this task.
10. If you want to track your progress on this task, in the **Status, Priority**, and **% Complete** boxes, enter the values that you want.

The **Status** and **% Complete** fields are linked. When you change the value in either field, the value in the other field changes accordingly.

STATUS	% COMPLETE
Not Started	0
In Progress	1-99
Completed	100
Waiting on someone else	0-100
Deferred	0-100

11. If you want to assign a color category to your task, on the **Task** tab, in the **Options** group, click **Categorize**, and then click one of the color categories on the menu. For more color categories, click **All Categories**.

The first time that you use a color category, you are prompted to provide a name for the color category that is more meaningful to you. You can create custom color categories, associate custom colors with the color categories, and assign shortcut keys to the color categories. Click **OK** to return to the Task window.

TIP Changed your mind about a color category assignment? Right-click the color or name of the color category, and then click **Clear Name of Category** or **Clear All Categories**.

12. If your task involves a person or organization in your Contacts, you can create a quick link to the contact, by clicking **Contacts** at the bottom of the window, and then selecting an entry. Click **OK** to close the **Select Contacts** dialog box.

NOTE By default, Contacts linking does not appear on the message, contacts, and tasks windows. To turn on Contact linking, on the **Task** tab, in the **Actions** group, click **Save & Close**. On the main Outlook window, on the **Tools** menu, click **Options**. On the **Preferences** tab, click **Contact Options**, and then on the **Contact Options** dialog box under **Contact Linking**, select the **Show Contact Linking on all Forms** check box. Open your task to continue with this procedure.

13. If you do not want other people to see a shared task entry, on the **Task** tab, in the **Options** group, click **Private**.
14. If you want to enter mileage, work hours, and other billing information, on the **Task** tab, in the **Show** group, click **Details**. Type the information in the **Total work**, **Actual work**, **Mileage**, and **Billing information** text boxes.
15. On the **Task** tab, in the **Actions** group, click **Save and Close**.

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Create a task or a to-do item from an e-mail message

There are several ways to turn an e-mail message into a task or a to-do item.

Do any of the following:

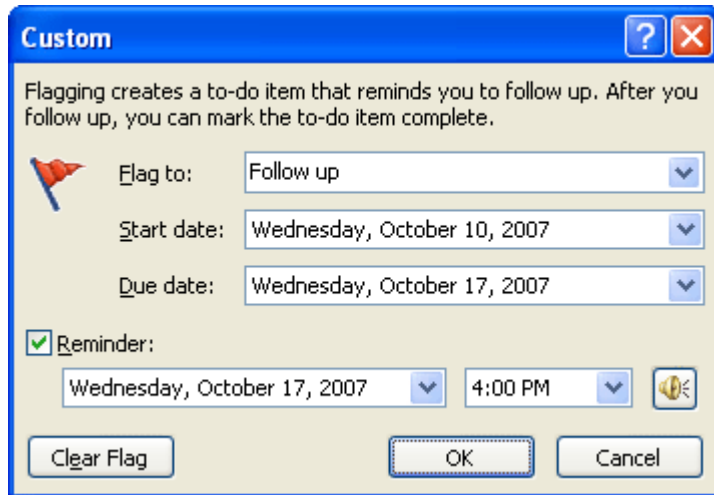
- Flag an e-mail message for follow-up

Flagging a message is the best option when you need to quickly mark an item for your attention at a later time. When you flag an item, it is displayed in the Mail view with a flag, in Tasks, in the To-Do Bar, and in the Daily Task List in Calendar. Flagging a message or contact does not create a new task. Because the to-do item still remains an e-mail message or contact after being flagged, you do not have the ability to assign it as a task to someone else, or indicate its progress or percentage of completeness.

1. In **Mail**, right-click the flag column for an e-mail message.
2. Choose the due date.

TIP To add a follow-up flag quickly, click the flag column next to the e-mail message. A start date and due date of today are set automatically.

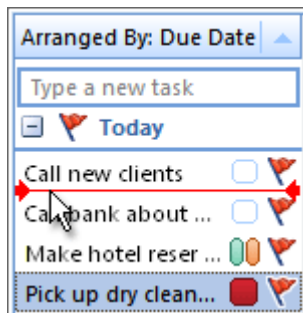
NOTE To change the reminder time, reminder sound, Start date, Due date, or the flag text that appears in the InfoBar, or to clear the reminder flag, right-click the flag column next to the e-mail message, and then click **Custom** or **Add Reminder**. Both options open the same dialog box, but when you use **Add Reminder**, the reminder check box is selected automatically.



- Drag an e-mail message to the To-Do Bar to create a to-do item

The To-Do Bar must be arranged by **Start Date** or **Due date** to use these procedures.

1. Click an e-mail message to select it, and then drag the message to the task list section of the To-Do Bar.
2. When you see a red line with arrows at each end positioned where you want to place the task, release the mouse button.



- Drag an e-mail message to the Tasks button to create a new task

When you drag an e-mail message to **Tasks** in the Navigation Pane, you can use all of the features of a task item, and the contents of the e-mail message, except attachments, are copied to the body of the task. Even if the original e-mail message is later deleted, the task, including the copied contents, except attachments, of the e-mail message, is still available.

1. Click an e-mail message to select it, and then drag it to the **Task** button on the Navigation Pane.

TIP To add the message as an attachment to the task instead of pasting the text into the task body, right-click the message and drag it to the task list. On the shortcut menu, click **Copy Here as Task with Attachment**.

A new task item window appears, and a copy of the e-mail contents is pasted into the task body. The subject of the e-mail message becomes the subject of the task. If you want, you can change the subject.

NOTE You have now entered enough information to create a task. The following steps are optional, but will help you better manage your tasks in Outlook.


2. On the **Task** tab, in the **Actions** group, click **Save & Close** or continue with the following steps to customize your task.
3. If you want, set the **Start date** and the **Due date** for the task.

If you specify a **Start date**, the **Due date** field is automatically set for the same day. You can change the **Due date** to a date that you want.

4. If you want to make the task recur, on the **Task** tab, in the **Options** group, click **Recurrence**.
5. In the **Task Recurrence** dialog box, click the frequency (**Daily**, **Weekly**, **Monthly** or **Yearly**) with which the task should recur, and then do one of the following:
 - **Make the task recur at regular intervals** In the **Recurrence pattern** section, select the options for the frequency interval that you want. Do not select **Regenerate new task** or the task will not recur at regular intervals.
 - **Make the task recur based on completion date** Select **Regenerate new task**, and in the box, type the amount of time after which a new task must be generated.

Each time you mark the task complete, a new task will be created based upon your selections.

TIP This is your best choice when you do not want the next reminder for a task to appear until the previous one is marked complete. If you do not mark the item complete, the next reminder will never appear. For example, if you have a reminder to pay your utility bill on the 15th of each month and you do not mark the occurrence on April 15th as complete, in May you will still see the April 15th task. Once you mark the April 15th task complete, the May 15th occurrence of the task will appear.

6. Click **OK** to close the **Task Recurrence** dialog box.
7. If you want to add a reminder, select the **Reminder** check box to turn on a reminder alert. Enter the date and time you want for the reminder.
8. You can specify a custom sound to be played with your reminder. Click , click **Browse**, select the sound file to play, click **Open**, and then click **OK**. This changes the reminder sound only for this task.
9. If you want to track your progress on this task, in the **Status**, **Priority**, and **% Complete** boxes type or select the options you want.

The **Status** and **% Complete** fields are dependent on each other. By changing the value in one field, the value in the other field changes accordingly.

STATUS	% COMPLETE
Not Started	0
In Progress	1-99
Completed	100
Waiting on someone else	0-100
Deferred	0-100

10. If you want to assign a color category to your task, on the **Task** tab, in the **Options** group, click **Categorize**, and then click one of the entries from the menu. For more color categories, click **All Categories**.

The first time you use a color category, you will be prompted to provide a name that is more meaningful to you. You can create custom color categories, associate custom colors with color categories, and assign shortcut keys. Click **OK** to return to the Task window.

TIP Changed your mind about a color category assignment? Right-click the color or name of the color category, and then click **Clear Name of Category** or **Clear All Categories**.

11. If your task involves a person or organization in your Contacts, you can create a quick link to the contact, by clicking **Contacts** at the bottom of the window, and then selecting an entry. Click **OK** to close the **Select Contacts** dialog box.
12. If you do not want other people to see a shared task entry, on the **Task** tab, in the **Options** group, click **Private**.
13. If you want to enter mileage, work hours, and other billing information, on the **Task** tab, in the **Show** group, click **Details**. Type the information in the **Total work**, **Actual work**, **Mileage**, and **Billing information** text boxes.
14. On the **Task** tab, in the **Save** group, click **Save and Close**.

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Create a to-do item from a contact

Flagging a contact is the best option when you need to quickly mark a contact for your attention at a later time. Flagging a contact creates a to-do item, with the text of the flag in the InfoBar. The flagged contact is also displayed in the Tasks list, To-Do Bar, and in the Calendar Daily Task List. Flagging a contact does not create a new task item. Because the to-do item still remains a contact, you do not have the ability to assign it as a task to someone else, or to indicate its progress or percentage complete.

1. In **Contacts**, right-click the contact.
2. Point to **Follow Up** on the shortcut menu, and then click the due date.

TIP To change the reminder time, reminder sound, Start date, Due date, or the flag text that appears in the InfoBar, or to clear the reminder flag, click **Custom** or **Add Reminder**. (Both options open the same dialog box, but when you use **Add Reminder**, the reminder check box is selected automatically.)

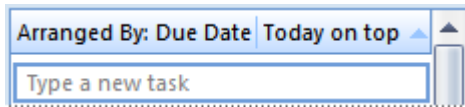
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Create a task in the To-Do Bar

The To-Do Bar appears in all Outlook views by default. You can turn the To-Do Bar on or off. In addition, you can choose to display a minimized version of the To-Do Bar, which uses less screen space. When you turn the To-Do Bar on or off, or minimize it in a specific view, the setting applies only to that view. For example, if you turn off the To-Do Bar in the Mail view, it will remain off each time you are in the Mail view, including the next time you start Outlook. However, it remains on in other views such as Calendar, Notes and Tasks.

- To toggle the To-Do bar on or off, click **View**, point to **To-Do Bar**, and then click **Normal**, **Minimized**, or **Off**.

1. To create a new task in the To-Do Bar, click in the **Type a new task** text box (called the Task Input Panel, type a subject for the task, and then press ENTER.



By default, the task will be assigned a due date and a start date that are based upon the flag's **Set Quick Click** setting. When you first install Outlook, this setting is configured as **Today**.

If you create a task and change the flag to another Due date choice, any future tasks that you enter in the To-Do Bar will use the new setting. You can always override the choice that is displayed and pick another option. However, when you restart Outlook, the first task entered will default to the **Set Quick Click** flag setting.

TIP To change the default flag setting, right-click the flag column in any view, click **Set Quick Click**, and then choose the flag setting that you want. The options include **No Date**. Choosing the **No Date** flag makes the item appear in the **No Date** group in the To-Do Bar.

NOTE You have now entered enough information to create a task. The following steps are optional, but will help you better manage your tasks in Outlook.


2. Continue with the following steps to customize your task by double-clicking the task in the To-Do Bar.
3. If you want, set the **Start date** and the **Due date** for the task.

If you specify a **Start date**, the **Due date** field is automatically set for the same day. You can change the **Due date** to a date that you want.

4. If you want to make the task recur, on the **Task** tab, in the **Options** group, click **Recurrence**.
5. In the **Task Recurrence** dialog box, click the frequency (**Daily**, **Weekly**, **Monthly** or **Yearly**) with which the task should recur, and then do one of the following:
 - **Make the task recur at regular intervals** In the **Recurrence pattern** section, select the options for the frequency interval that you want. Do not select **Regenerate new task** or the task will not recur at regular intervals.
 - **Make the task recur based on completion date** Select **Regenerate new task**, and in the box, type the amount of time after which a new task must be generated.

Each time you mark the task complete, a new task will be created based upon your selections.

TIP This is your best choice when you do not want the next reminder for a task to appear until the previous one is marked complete. If you do not mark the item complete, the next reminder will never appear. For example, if you have a reminder to pay your utility bill on the 15th of each month and you do not mark the occurrence on April 15th as complete, in May you will still see the April 15th task. Once you mark the April 15th task complete, the May 15th occurrence of the task will appear.

6. Click **OK** to close the **Task Recurrence** dialog box.
7. If you want to add a reminder, select the **Reminder** check box to turn on a reminder alert. Enter the date and time you want for the reminder.
8. You can specify a custom sound to be played with your reminder. Click , click **Browse**, select the sound file to play, click **Open**, and then click **OK**. This changes the reminder sound only for this task.

9. If you want to track your progress on this task, in the **Status**, **Priority**, and **% Complete** boxes type or select the options you want.

The **Status** and **% Complete** fields are dependent on each other. By changing the value in one field, the value in the other field changes accordingly.

STATUS	% COMPLETE
Not Started	0
In Progress	1-99
Completed	100
Waiting on someone else	0-100
Deferred	0-100

10. If you want to assign a color category to your task, on the **Task** tab, in the **Options** group, click **Categorize**, and then click one of the entries from the menu. For more color categories, click **All Categories**.

The first time you use a color category, you will be prompted to provide a name that is more meaningful to you. You can create custom color categories, associate custom colors with color categories, and assign shortcut keys. Click **OK** to return to the Task window.

TIP Changed your mind about a color category assignment? Right-click the color or name of the color category, and then click **Clear Name of Category** or **Clear All Categories**.

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12. If you do not want other people to see a shared task entry, on the **Task** tab, in the **Options** group, click **Private**.

13. If you want to enter mileage, work hours, and other billing information, on the **Task** tab, in the **Show** group, click **Details**. Type the information in the **Total work**, **Actual work**, **Mileage**, and **Billing information** text boxes.

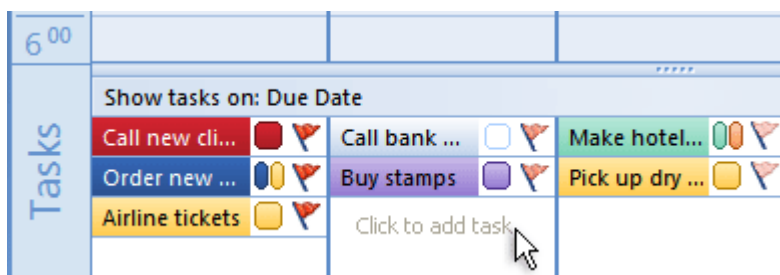
14. On the **Task** tab, in the **Save** group, click **Save and Close**.

TIP To move a task up or down on the list, click and drag the item to the position that you want. As you drag the task, a red line with arrows indicates where the task will be placed when you release the mouse button.


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Create a task in the Daily Task List in Calendar

The Daily Task List appears only in the Outlook Calendar day and week views. To toggle the Daily Task List on or off, in Calendar, click **View**, point to **Daily Task List**, and then click **Normal**, **Minimized**, or **Off**.



To display only the total number of tasks, do one of the following:

- In Calendar, click **View**, point to **Daily Task List**, and then click **Minimized**.
- Point to the top edge of the Daily Task List. When the pointer becomes a , drag the edge to the bottom of the window.

TIP To create new tasks in the Daily Task List, you must use the **Normal** Daily Task List setting.


1. In the Daily Task List, as your pointer hovers, **Click to add task** is displayed.
2. Click any blank space beneath a day column.
3. Type a subject for the task, and then press ENTER.

By default, the task will be assigned a Start date and Due date of the day in the column above the Daily Task List. To change the Start date or Due date of the task, drag the created task to the day that the task is due. Instead of dragging the task, you can open the task and then change the start and due dates. To do so, you can right-click the task, and then click **Open**, or select the item, press ESC, and then press ENTER.

4. If you want to make the task recur, on the **Task** tab, in the **Options** group, click **Recurrence**.
5. In the **Task Recurrence** dialog box, click the frequency (**Daily**, **Weekly**, **Monthly** or **Yearly**) with which the task should recur, and then do one of the following:
 - **Make the task recur at regular intervals** In the **Recurrence pattern** section, select the options for the frequency interval that you want. Do not select **Regenerate new task** or the task will not recur at regular intervals.
 - **Make the task recur based on completion date** Select **Regenerate new task**, and in the box, type the amount of time after which a new task must be generated.

Each time you mark the task complete, a new task will be created based upon your selections.

TIP This is your best choice when you do not want the next reminder for a task to appear until the previous one is marked complete. If you do not mark the item complete, the next reminder will never appear. For example, if you have a reminder to pay your utility bill on the 15th of each month and you do not mark the occurrence on April 15th as complete, in May you will still see the April 15th task. Once you mark the April 15th task complete, the May 15th occurrence of the task will appear.

6. Click **OK** to close the **Task Recurrence** dialog box.
7. If you want to add a reminder, select the **Reminder** check box to turn on a reminder alert. Enter the date and time you want for the reminder.
8. You can specify a custom sound to be played with your reminder. Click , click **Browse**, select the sound file to play, click **Open**, and then click **OK**. This changes the reminder sound only for this task.
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TIP To move a task up or down on the list, click and drag the item to the position that you want. As you drag the task, a red line with arrows indicates where the task will be placed when you release the mouse button.