Outlook- Schulungsmaterial
für IT Seminare und EDV Schulungen
als Word-Dokument

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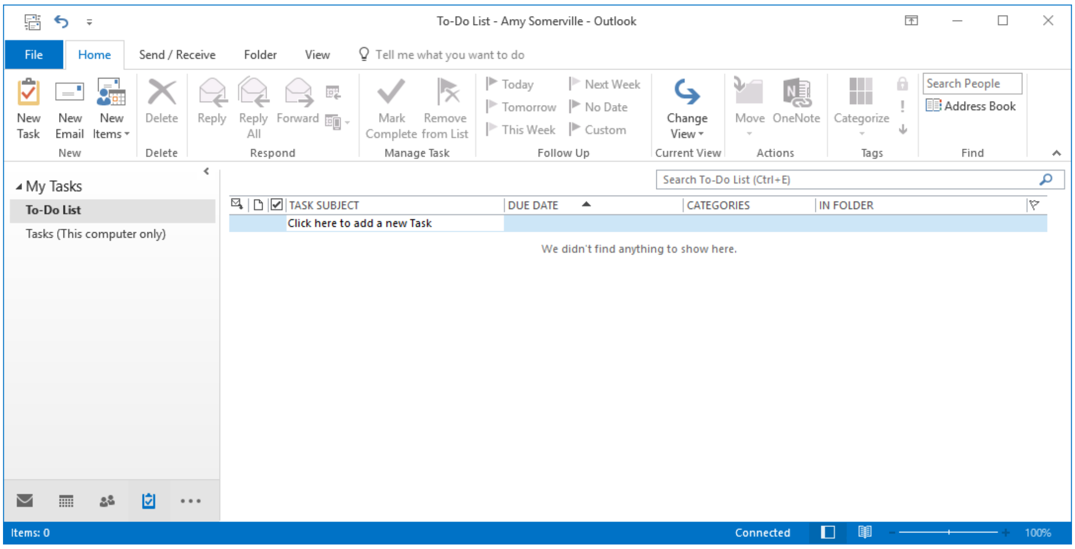
11 Managing and Assigning Tasks

In Outlook, tasks are activities that have no fixed time frame but must be carried out nevertheless. However, you can enter a target date for completing the tasks, and their priority. Moreover, you can monitor tasks and specify what percentage of each task has already been completed.

11.1 Entering new tasks

In the folder pane or the navigation bar, click the **Tasks** button, and if necessary switch the view to **Simple List** (**View** tab, **Current View** group, **Change View**):


To-Do List - Amy Somerville - Outlook
File
Home
Send / Receive
Folder
View
Tell me what you want to do
New Task
New Email
New Items
New
Delete
Delete
Reply
Reply All
Forward
Respond
Mark Complete
Remove from List
Manage Task
Today
Tomorrow
This Week
Next Week
No Date
Custom
Follow Up
Change View
Current View
Move
OneNote
Actions
Categorize
Tags
Search People
Address Book
Find
My Tasks
To-Do List
Tasks (This computer only)
Search To-Do List (Ctrl+E)
TASK SUBJECT
DUE DATE
CATEGORIES
IN FOLDER
Items: 0
Connected
100%

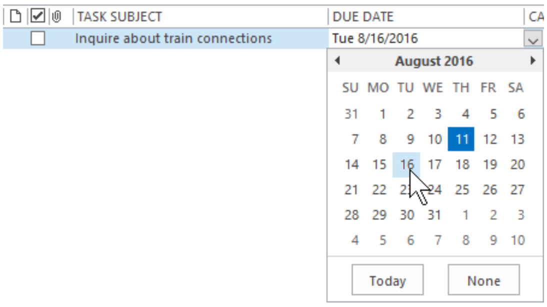
Click here to add a new Task

We didn't find anything to show here.

The task window

Assume you are to organize a company outing for your department. You want to take a train trip to a large city with an overnight stay. In this context, there are various things you need to do.

6. You can enter the task directly into the to-do list. In the upper part of the window you can see the **Click here to add a new Task** box. Enter the text **Inquire about train connections**.
7. Afterward, click the **DUE DATE** field. Either type the date on which you want to finish the task manually into the field or click the ⌄ of this field. In this case, a small calendar appears in which you can select the date with a click. Decide on August 16th.


TASK SUBJECT
DUE DATE
CA
Today
None

☐ Inquire about train connections | Tue 8/16/2016

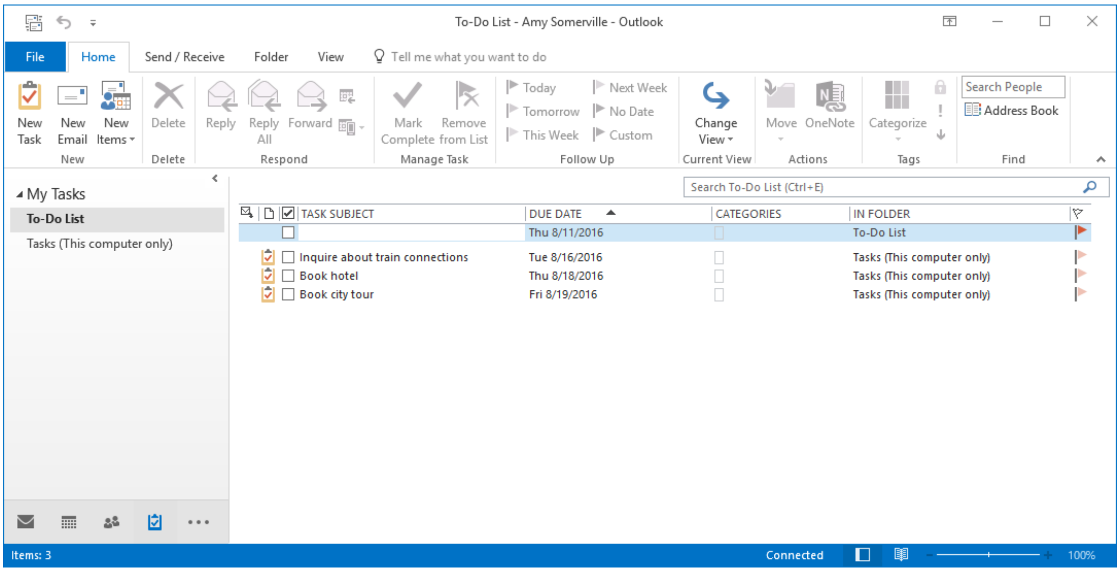
August 2016

SU	MO	TU	WE	TH	FR	SA
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

The due date can directly be clicked in a calendar

Setting the **DUE DATE** is optional. If the **DUE DATE** column isn't visible, add it as described on page 83.

8. Complete the entry with the `Enter` key. The task is automatically added to the list. You can still make adjustments afterward.
9. Add the **Book hotel** and **Book city tour** tasks to your list. These tasks should be completed by August 18th and August June 19th respectively.


To-Do List - Amy Somerville - Outlook
File
Home
Send / Receive
Folder
View
Tell me what you want to do
New Task
New Email
New Items
New
Delete
Delete
Reply
Reply All
Forward
Respond
Mark Complete
Remove from List
Manage Task
Today
Tomorrow
This Week
Next Week
No Date
Custom
Follow Up
Change View
Current View
Move
OneNote
Actions
Categorize
Tags
Search People
Address Book
Find
My Tasks
To-Do List
Tasks (This computer only)
Search To-Do List (Ctrl+E)
Items: 3
Connected
100%

		TASK SUBJECT	DUE DATE ▲	CATEGORIES	IN FOLDER
	☐		Thu 8/11/2016		To-Do List
	☐	Inquire about train connections	Tue 8/16/2016		Tasks (This computer only)
	☐	Book hotel	Thu 8/18/2016		Tasks (This computer only)
	☐	Book city tour	Fri 8/19/2016		Tasks (This computer only)

Three tasks

By clicking the **DUE DATE** column header you sort the tasks by date: ascending ▲ or descending ▼.

Assigning priority

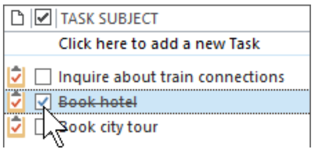
Especially if you have lots of tasks, it can be helpful to assign priorities to certain tasks. Thereby you keep an overview of which tasks are particularly important and which are less so. To do this, select the respective task from the list of tasks and, on the **Home** tab, in the **Tags** group, click the **High Importance** ! or **Low Importance** ↓ button. Then add the **Priority** column to the task area as described on page 83. Now, you can sort your tasks according to their importance by selecting **Prioritized** view in the **Current View** gallery.

11.2 Completed tasks

As soon as you have completed a task you can

- mark the task as complete and then
- delete the entry in the list.

To the left of the task lines you see a check box ☐. If you click it with the left mouse button, the task next to it gets a check mark and is crossed out. Clicking it again removes the check and the crossing out:

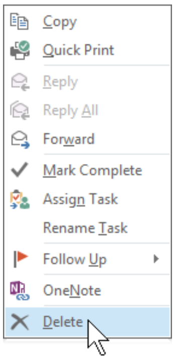


		TASK SUBJECT
		Click here to add a new Task
	☐	Inquire about train connections
	☑	~~Book hotel~~
	☐	Book city tour

Marking a task as completed

To delete the task, *right*-click the line and select the **Delete** command from the context menu.

If the **Complete** check box is not visible you can add it as described on page 83.


Copy
Quick Print
Reply
Reply All
Forward
Mark Complete
Assign Task
Rename Task
Follow Up
OneNote
Delete

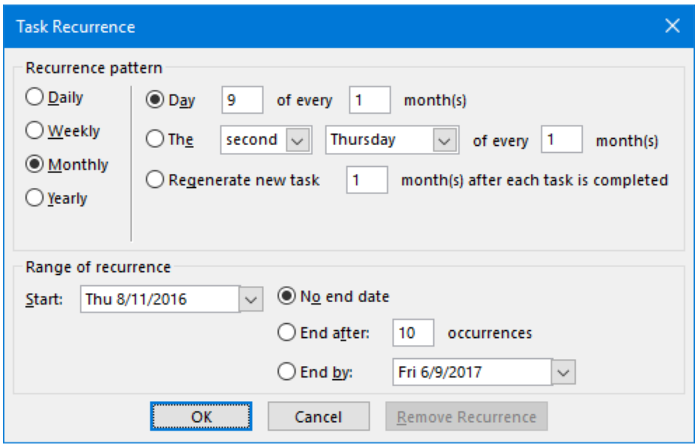
A context menu

11.3 Recurring tasks

Tasks can also be repeated at regular intervals. Just think of the monthly close in the financial accounts department or paying salaries in the personnel department.

Assume that you want to file the monthly tax return on the 9th of every month:

10. Open a new, empty task form window, for example using the **New Task** button on the **Home** tab in **New** group.
11. In the subject line enter: **File tax return**.
12. Press the `Ctrl`+`G` key combination.
13. The **Task Recurrence** dialog box appears. Enter the following data:


Task Recurrence
OK
Cancel
Remove Recurrence

Recurrence pattern

○ Daily
○ Weekly
● Monthly
○ Yearly

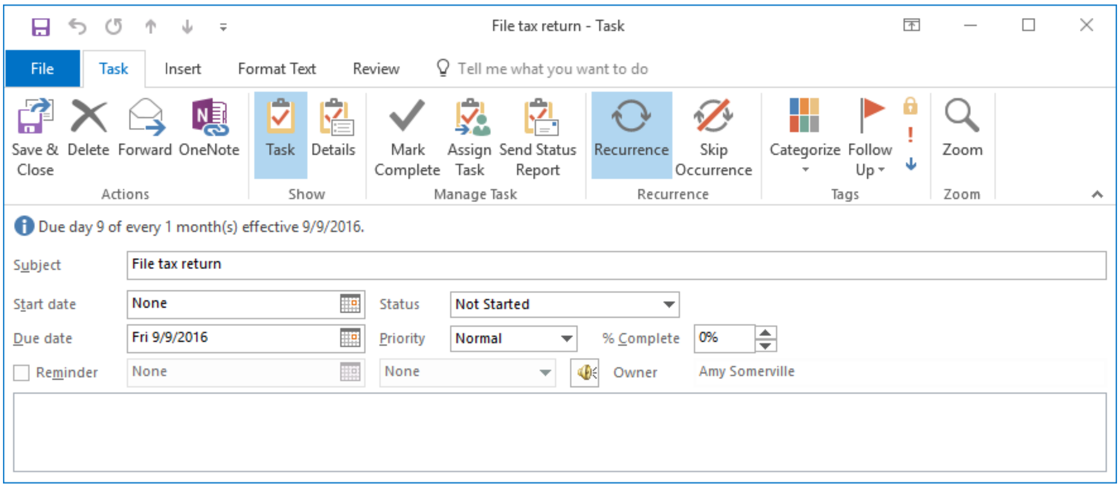
● Day 9 of every 1 month(s)
○ The second Thursday of every 1 month(s)
○ Regenerate new task 1 month(s) after each task is completed

Range of recurrence

Start: Thu 8/11/2016
● No end date
○ End after: 10 occurrences
○ End by: Fri 6/9/2017

A monthly task

14. Close the dialog box using the `OK` button.
15. In the following form window you can identify the task recurrence by the bar above the subject line:


File tax return - Task
File
Task
Insert
Format Text
Review
Tell me what you want to do
Save & Close
Delete
Forward
OneNote
Actions
Task
Details
Show
Mark Complete
Assign Task
Send Status Report
Manage Task
Recurrence
Skip Occurrence
Recurrence
Categorize
Follow Up
Tags
Zoom
Zoom

Due day 9 of every 1 month(s) effective 9/9/2016.

Subject: File tax return
Start date: None
Status: Not Started
Due date: Fri 9/9/2016
Priority: Normal
% Complete: 0%
☐ Reminder: None None
Owner: Amy Somerville

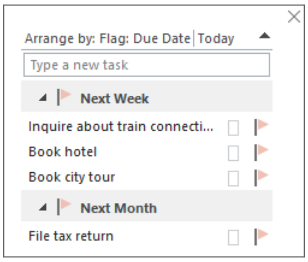
You can identify task recurrence by the bar above the subject line

16. Exit the form window as usual using the **Save & Close** button.

11.4 Always show tasks

With the help of the to-do bar you can always display your tasks. Use the path **View** tab, **Layout** group, **To-Do Bar**, **Tasks**, as described on pages 19 and 91.

By double-clicking an entry in the to-do bar you open the corresponding form window. For tasks with an activated reminder 🔔 you will only get a message if the check box in the **Task options** area of **Outlook Options** is activated:

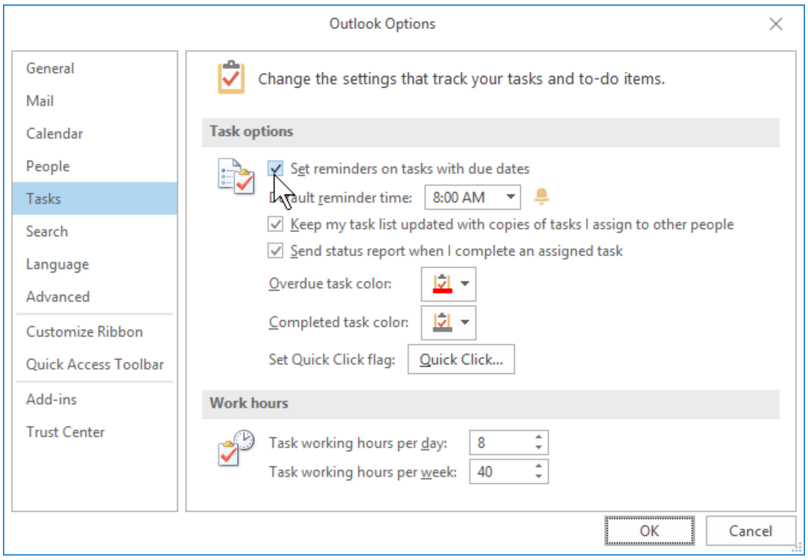

Arrange by: Flag: Due Date | Today

Type a new task

Next Week
- Inquire about train connecti...
- Book hotel
- Book city tour

Next Month
- File tax return

You can switch the to-do bar on and off



Change the settings that track your tasks and to-do items.

Task options

☑ Set reminders on tasks with due dates

Default reminder time: 8:00 AM

☑ Keep my task list updated with copies of tasks I assign to other people

☑ Send status report when I complete an assigned task

Overdue task color:

Completed task color:

Set Quick Click flag: Quick Click...

Work hours

Task working hours per day: 8

Task working hours per week: 40

Activating reminders

11.5 Exercises

Assume that you work in the personnel department and need to run the payroll. In this context, various things need to be done:

- checking the time account of employees
- running the payroll for the employees and
- preparing to transfer the salaries.

17. Enter the tasks with due dates of your choice.
18. Set up the tasks as a series of tasks as they are repeated every month.

11.6 Summary: Tasks

New task

Activities that have no fixed time frame but must be carried out nevertheless are called tasks. In the folder pane or navigation bar, click the **Tasks** button. You can enter the task directly into the task list: **Click here to add a new Task**.

Completed tasks

Completed tasks can be marked as complete and then be deleted from the list: Activate the **Complete** check box on the left of the task line. To delete the task, *right*-click the task and select **Delete** from the context menu.

If the **Complete** check box is hidden you can add it as described on page 83.

Priority

To determine the importance of indivual tasks use the ! and ↓ icons on the **Home** tab in the **Tags** group.

Recurring tasks (series of tasks)

For a constantly recurring task, open a new Task form window, for example via **Home** tab, **New** group, **New Items** button, **Task** in *any view*. Press the Ctrl+G key combination or click the **Recurrence** button on the **Task** tab in the **Recurrence** group and, in the **Task Recurrence** dialog box, set the data as required.

To-do bar

The to-do bar was introduced on page 19. It can display, among other things, a list of upcoming tasks. Double-clicking an entry in the to-do bar opens the corresponding form window.

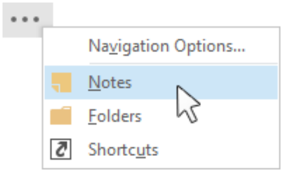
Different views

No matter what you are doing, Outlook offers you various views in all views (modules). Use the buttons in the **Current View** group on the **View** tab to choose a suitable setting from a great variety.

12 Notes - The Electronic Notepad

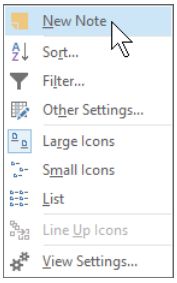
You have probably come across the yellow post-it notes which represent an indespensable resource for many people to remind them of things. In Outlook these self-adhesive notes exist in electronic form.

12.1 Creating notes

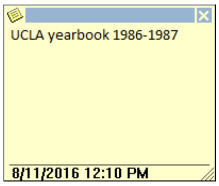

•••
Navigation Options...
Notes
Folders
Shortcuts

Submenu of the ••• icon

1. In the folder pane or the navigation bar (page 18), click the ••• icon and select **Notes**.
2. *Right*-click any empty spot of the workspace. In the context menu, select the **New Note** command.


New Note
Sort...
Filter...
Other Settings...
Large Icons
Small Icons
List
Line Up Icons
View Settings...

Context menu



UCLA yearbook 1986-1987

8/11/2016 12:10 PM

A completed yellow note

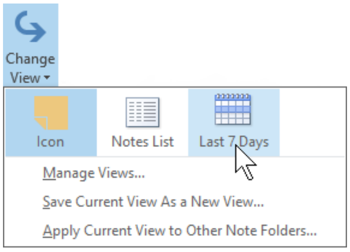
3. A small yellow note will appear. Enter the necessary information. Apply the data from the following figure and set up two more notes of your choice.
4. Click the **Close** ☒ icon.
5. An icon in the workspace indicates that there is a note. The icon labeling gives you an indication of the contents of the note. If the note is very short, you will see all of it.

12.2 Displaying and deleting notes

There are also different types of views available for notes. Call up: **View** tab, **Current View** group, **Change View**. In the submenu, select another view.

In Outlook, the **reading pane** is available on the **View** tab (**Layout** group). If this view is switched on, you can see the first part of the current, the selected note.

To delete a note, select the **Delete** command from the context menu.


Change View
Icon
Notes List
Last 7 Days
Manage Views...
Save Current View As a New View...
Apply Current View to Other Note Folders...

You can choose between different views

12.3 Exercises

1. Set up the following notes:

   - Call Ms. Compton in Sales.

   - Collect items from dry-cleaner's.

   - Don't forget, it's Grandma's birthday.

2. Display the notes in the reading pane as well and delete them afterward.

12.4 Summary: Notes

Creating notes

In the folder pane or navigation bar, click the ••• icon and select **Notes**. *Right*-click any empty spot of the workspace and select the **New Note** command from the context menu. Enter your text in the small yellow note. Clicking the ✕ icon minimizes the note.

Different news

The **Notes** view offers you various views as well. Call up: **View** tab, **Current View** group, **Change View** and select another view from the submenu.

Deleting notes

To delete a note, select the **Delete** command from the context menu.

13 Printing Plans and Lists

The key to printing appointment plans, task lists, messages and address book information etc. is the **Print** page on the **File** menu.

13.1 Print view (print preview)

Folder pane

In the folder pane or the navigation bar, click the button of the view (**Mail**, **Calendar**, **Contacts**, **Tasks**, **Notes**) you want to print something from. You can also start the printout from a message window, contact window, or task window, etc.

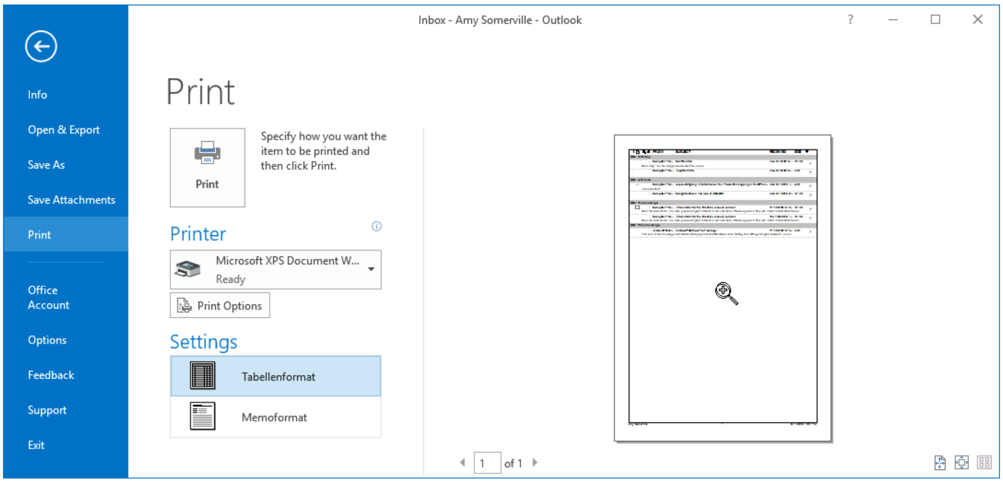
In almost every program that allows you to print something, you can preview the print on the screen. You should use it to avoid unnecessary printing. In Outlook 2016 print preview is integrated on the **File** menu.

To open the print preview,

File

- Press the `Ctrl`+`P` key combination, or
- open the **File** menu and select the **Print** page.
- If the **Print** dialog box (page 110) is already open, click the `Preview` button.

On the right side of the window, the **print preview** is displayed, as shown in the following image.


Inbox - Amy Somerville - Outlook
?
Info
Open & Export
Save As
Save Attachments
Print
Office Account
Options
Feedback
Support
Exit
Print
Print
Printer
Microsoft XPS Document W...
Ready
Print Options
Settings
Tabellenformat
Memoformat
1
of 1

Specify how you want the item to be printed and then click Print.

Print preview on the right side of the window with the magnifying glass

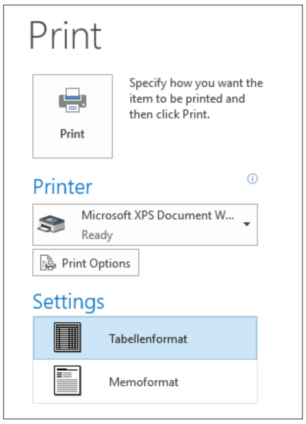
If the print job contains several pages, you can scroll through the print preview by using the `PgUp` or `PgDown` keys, or with the arrows at the bottom of the window ◂ 1 of 2 ▸. You can also use the mouse on the vertical scroll bar on the right side. Or scroll by turning the wheel of the mouse (page 23), but you may have to click with the mouse on the preview beforehand.

The **File** menu, and therefore the print preview, can be closed with the `Esc` key or the ⊖ arrow at the top of the navigation pane.

In the area between the navigation pane and the print preview you specify how you want the item to be printed:

Print

Use the **Print** button to start printing. But please check or change the following optional settings first.



Print
Print
Specify how you want the item to be printed and then click Print.
Printer
Microsoft XPS Document W...
Ready
Print Options
Settings
Tabellenformat
Memoformat

Print settings and starting printing

Printer

Use the arrow ▾ to select the printer. A change is applied until the program is closed. After restarting Outlook, the default printer is set again.

Print options

Clicking the **Print Options** button opens the **Print** dialog box described in the following.

Settings

Here you set the required print style, for example **Table Style**.

13.2 The Print dialog box

Switch on the printer. To call up the dialog box on the right, click the **Print Options** button on the **Print** page of the **File** menu.

You will find the following setting options:

Printer Name

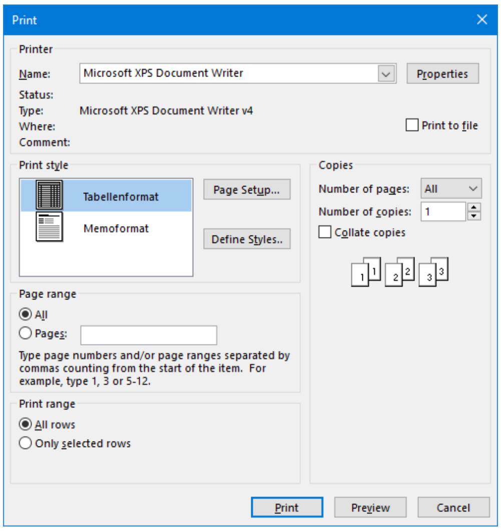
Here you select the printer.

`Properties`

To set up the printer, e.g. paper size, resolution.

☐ **Print to file**

For example to print the file on another printer.



Name: Microsoft XPS Document Writer

Status:

Type: Microsoft XPS Document Writer v4

Where:

Comment:

Number of pages: All

Number of copies: 1

☐ Collate copies

☐ Print to file

● All

○ Pages:

Type page numbers and/or page ranges separated by commas counting from the start of the item. For example, type 1, 3 or 5-12.

● All rows

○ Only selected rows

Print
Printer
Properties
Print style
Tabellenformat
Memoformat
Page Setup...
Define Styles..
Copies
Page range
Print range
Print
Preview
Cancel

The Print dialog box

Print style

Decide in the **Print style** box on the template you want to use, for example **Table** or **Memo Style**. However, you can also define your own print styles.

`Page Setup`

Calling up the **Page Setup** dialog box (page 112).

`Define styles`

To define print styles.

Page range

If you don't want to print all pages, enter the numbers in the **Pages** text field directly below:

e.g.: To print pages 2 *to* 5, Enter: **2-5**

To print pages 2 *and* 5, Enter: **2,5**

Copies

Number of pages: Print all pages, print only the even or only the odd pages.
Number of copies: Enter the number of copies to be printed.

☑ **Collate copies**
If the check box is activated (with a check mark) and if several copies are being printed, each copy will be printed completely before it starts printing the next copy.

Print range

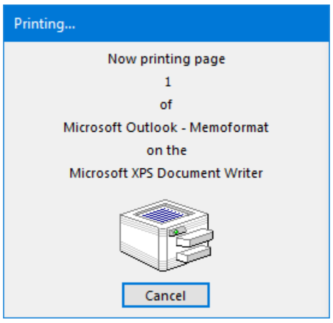
● **All rows**

● Only selected rows

Preview
shows the **File** menu with the print preview.

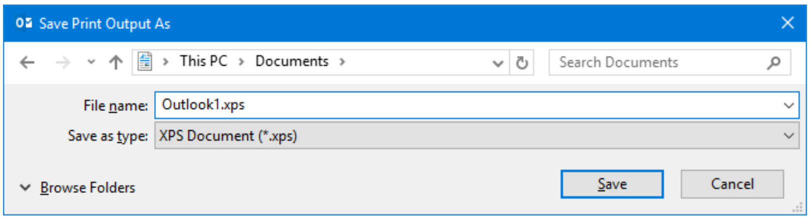
Use the Print button to start printing.

In this example, for test purposes, the printer driver **Microsoft XPS Document Writer** was selected. Here, you "print" into a file which you can view with the XPS Viewer or Internet Explorer. After clicking the Print button, type in a file name and save:



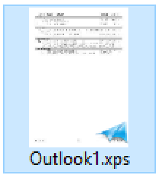
Now printing page
1
of
Microsoft Outlook - Memoformat
on the
Microsoft XPS Document Writer

Print process started



File name: Outlook1.xps
Save as type: XPS Document (*.xps)

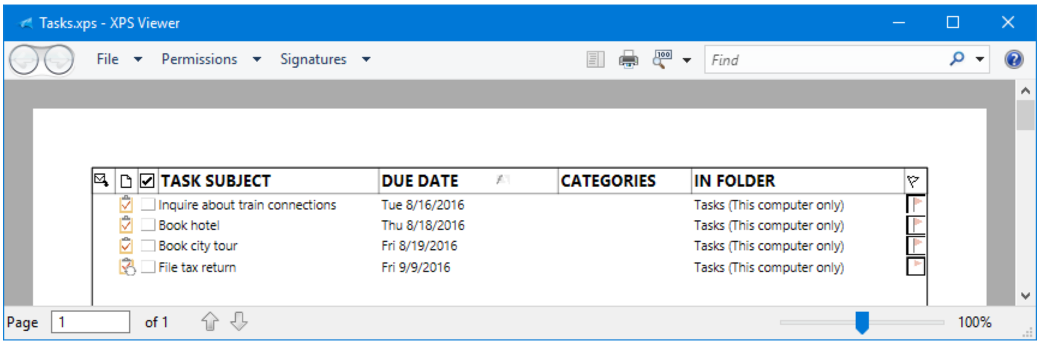
Enterin an XPS file name



XPS print file in the Documents folder

OpenXPS-Dokument (*.oxps)

In Windows 10, the printer driver **Microsoft XPS Document Writer** provides the **OpenXPS Document** file format (*.oxps) in addition to the **XPS** file type. This file type can also be opened with the XPS Viewer, but not yet with the **Internet Explorer**. Maybe soon a so-called add-on for the **OXPS** file format will be available for the Internet Explorer. When printed, there is no difference between **XPS** and **OXPS**. The **OXPS** file type belongs to the standardized group of **o**pen **d**ocument **f**omats (**ODF**). This standard for file formats for office documents is obligatory in many companies and governmental institutions.



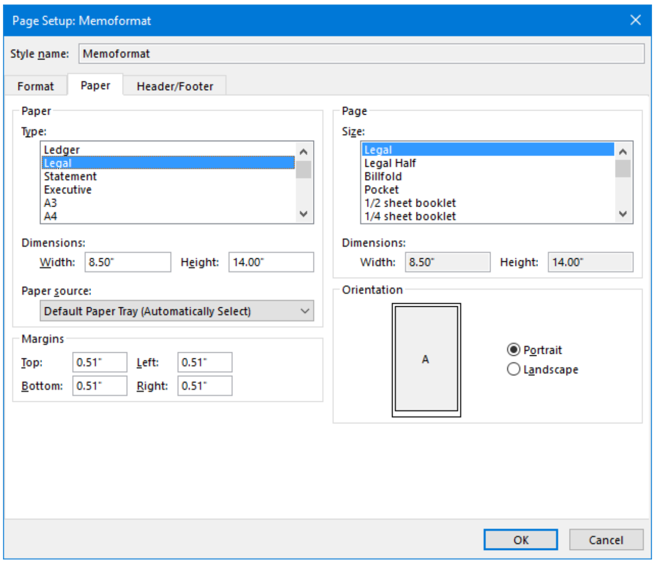
		☑	TASK SUBJECT	DUE DATE	CATEGORIES	IN FOLDER	
		☐	Inquire about train connections	Tue 8/16/2016		Tasks (This computer only)	
		☐	Book hotel	Thu 8/18/2016		Tasks (This computer only)	
		☐	Book city tour	Fri 8/19/2016		Tasks (This computer only)	
		☐	File tax return	Fri 9/9/2016		Tasks (This computer only)	

An XPS or OXPS print file is opened by double-clicking it.

13.3 Page setup

From the **Print** dialog box (see page 110) you can get to the following dialog box by using the `Page Setup` button.

There are three tabs available in which you can provide information on the format, paper, margins, header, and footer etc.


Page Setup: Memoformat
Format
Paper
Header/Footer
Paper
Page
Ledger
Legal
Statement
Executive
A3
A4
Legal
Legal Half
Billfold
Pocket
1/2 sheet booklet
1/4 sheet booklet
Orientation
A
OK
Cancel

Style name: Memoformat

Paper Type: Legal

Dimensions: Width: 8.50" Height: 14.00"

Paper source: Default Paper Tray (Automatically Select)

Margins: Top: 0.51" Left: 0.51" Bottom: 0.51" Right: 0.51"

Page Size: Legal

Dimensions: Width: 8.50" Height: 14.00"

● Portrait
○ Landscape

Setting up the paper format

13.4 Exercise

Print the tasks you composed in the **Managing and Assigning Tasks** chapter.

13.5 Summary: Printing

The Print page of the File menu

- In the folder pane or navigation bar (page 18), click the button of the view (**Mail**, **Calendar**, **Contacts**, **Tasks**, **Notes**) you want to print something from. However, you can also start the printout from a message window, contact window, or task window, etc.
- To open the **Print** page, click the **File** tab and in the navigation pane on the left the **Print** command or use the `Ctrl`+`P` keyboard shortcut.
- The **Print** page can be closed using the `Esc` key or the ⬅ arrow at the top of the navigation pane.

Print view (print preview)

The print preview is placed on the right part of the **Print** page. If the print job contains several pages, you can use the `PgUp` or `PgDown` keys or the arrows at the bottom of the window ◀ 1 von 2 ▶ to scroll through the print preview.

Print button, print options and further settings

On the **Print** page, in the area between the navigation pane and the print preview, there are several buttons and settings options:

- Clicking the **Print** button starts the printout.
- Via the **Printer** list box ▾ you select the printer.
- The **Print** dialog box is opened by clicking the **Print Options** button.
- In the **Settings** area, you set, for example, **Table Style** to print the message list or **Memo Style** to print the entire current email message.

The Print dialog box

The **Print Options** button calls up the **Print** dialog box. Here, you have various further settings options, for example printing only certain pages, number of copies, setting the printer properties. Furthermore, you can call up the **Page Setup** dialog box from here.

Page Setup dialog box

In this dialog box, which is called up from the **Print** dialog box, you can set the format, paper (type, dimensions), page margins and optional headers and footers.

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