



Outlook - Create and assign tasks

Create and tasks and to-do items

Many people keep a list of things to do — on paper, in a spreadsheet, or by using a combination of paper and electronic methods. In Outlook, you can combine your various lists into one list, enhanced with reminders and tracking.

Create a task

1. Select **New Items > Task** or press Ctrl+Shift+K.
2. In the **Subject** box, enter a name for the task. It's best to keep the name short and then add the details in the task body.
3. If there's a fixed start or end date, set the **Start date** or **Due date**.
4. Set the task's priority by using **Priority**.
5. If you want a pop-up reminder, check **Reminder**, and set the date and time.
6. Click **Task > Save & Close**.

Create a task from an Outlook item

You can create a task out of any Outlook item, such as e-mail message, contact, calendar item, or note.

Do one of the following:

- Drag an e-mail message to the To-Do Bar
- Drag an item to the Tasks icon in the Navigation Pane.

Tip: To add the item as an attachment to a new task instead of pasting the text into the task body, right-click the item and drag it to the task list, and then click **Copy Here as Task with Attachment**.

Create a task in the To-Do Bar

To create a task in the To-Do Bar, do one of the following:

- In the To-Do Bar, select the **Type a new task** box, and then enter the task description. Press ENTER to finish. The task appears in your To-Do list with today's date.
- In the To-Do Bar, double-click the **Type a new task** box to open a new task window. You can enter more detail about the task.

Tip: To turn on and show Tasks in the To-Do Bar, on the **View** tab, in the **Layout** group, select **To-Do Bar** and select **Tasks**. For more information about the To-Do Bar, see [Use and customize the To-Do bar](#).

[Click to watch the "Create tasks and a to-do list" video.](#)

View your tasks in Outlook

1. On the navigation bar, click **Tasks**.



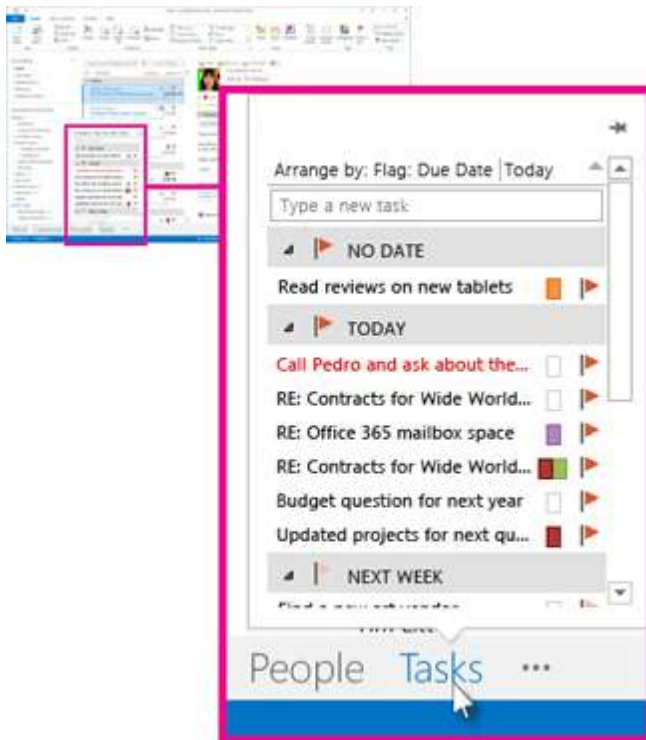
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2. Click a task to view it in the Reading Pane, or double-click it to open it in a new window.

Another way to see tasks, including flagged to-do items, is the Tasks peek.

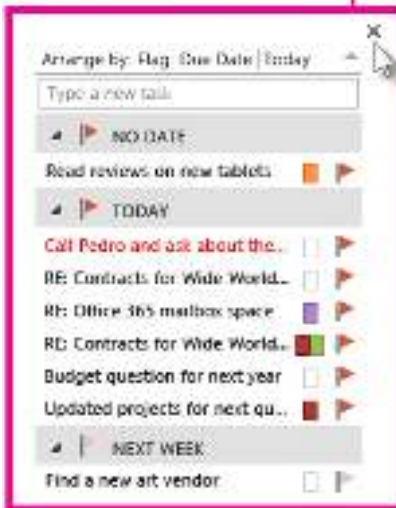
- Point to **Tasks** on the Navigation Bar.



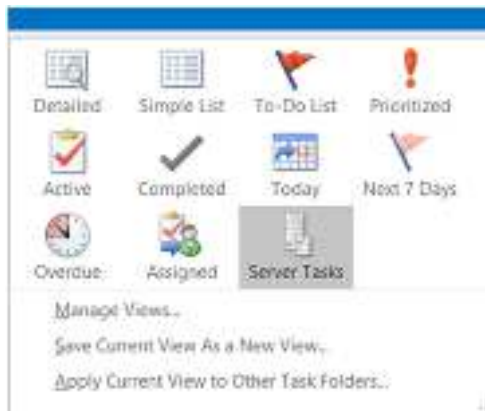
The Tasks peek pops up. To keep the Tasks peek in view, pin it by clicking .



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Tip: Sort your task list by clicking **Tasks > Home** and choosing one of many **Current View** options available.



Create a task from a message

When you want to create a task based on the contents of an email message, you don't have to re-enter all the information. Instead, click the message and drag it to **Tasks** on the navigation bar.



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The contents of the message, except attachments, are copied to the body of a new task. A task created this way is the same as if you create a task from scratch, except you save time as contents from the message are automatically added to the new task. Just like for any task, you can set a due date, add a reminder, or assign the task to someone else.

Tip: You can also drag contacts, calendar items, and notes to the Navigation Bar to create tasks.

Creating a task from a message versus flagging the message

When you flag an email message, the message appears in the To-Do List in Tasks and on the Tasks peek. However, if you delete the message, it also disappears from the To-Do List in Tasks and on the Tasks peek. Flagging a message doesn't create a separate task.

By creating a task from a message as described above, the new separate task is independent of the message. If the original message is deleted, the task is still available, including the copied contents of the message.

Assign and track tasks

Tasks help track things you need to do. You can assign tasks to other people as well.

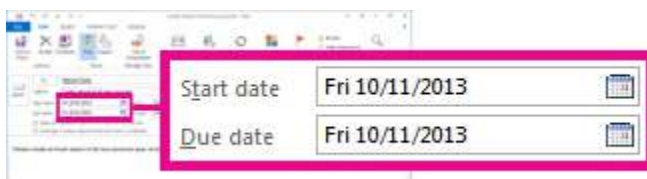
1. On the navigation bar, click **Tasks**, and then click **New Task**, or open an existing task.

Keyboard shortcut To create a task, press Ctrl+Shift+K.

2. Click **Assign Task**.



3. In the **To** box, enter a name or an email address.
4. Enter **Subject**, **Start date**, and **Due date**.



5. If you want the task to repeat, click **Recurrence**, select the options you want, and then click **OK**.
6. Click **Send**.

Note: If you assign a recurring task, a copy of the task remains in your task list, but it never updates. If you check the **Send me a status report when this task is complete** box, you receive status reports for each completed occurrence of the task.

When you open a task you assigned, you can review the progress of assigned tasks with the **% Complete** box which either you or the recipient can update when they send you an assigned task status report.



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Note: Tasks assigned from Outlook for Windows must be accepted or declined using the Outlook for Windows application. This experience is not supported in Outlook on the web.

Assigning tasks to multiple people

Outlook can track the progress of a task assigned to one person. If you want to multiple people to work on a task, it's a good idea to divide the task into smaller pieces or assign each task individually. For example, to track a report to be written by three writers, create three separate tasks named **Write Report: Anne**, **Write Report: Carlos**, and **Write Report: Michiyo**, and assign each individual task to the appropriate writer.

Track tasks you've assigned to someone else

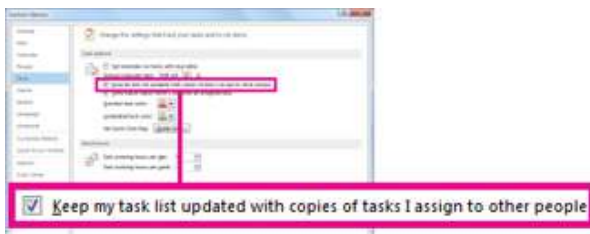
1. On the navigation bar, click **Tasks**.
2. Click **View > Change View > Assigned**.



Assigned tasks are missing

If you're not seeing tasks you've assigned, Outlook might not be set up to keep copies of tasks you assign.

1. Click **File > Options > Tasks**.
2. Under **Task options**, check the **Keep my task list updated with copies of tasks I assign to other people** box.



Turning on this option doesn't track the tasks you've already assigned, but it will track any new ones you assign.

For more information, please refer to the Microsoft training resource page [HERE](#)