

## 11 Using Task Lists

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This chapter explains how to...



- Create a new task list
- Manage your tasks and task lists

You can use your task lists to create and track the progress of a task. In addition, you can write notes within your task and attach files for easy access from within the task. Having all the relevant information with your task is useful when you share your task list with others.

For simple task all you may need to do is create a task from the Content pane. If a task needs to be managed, you can add more details, define a start and due date, set the priority to the

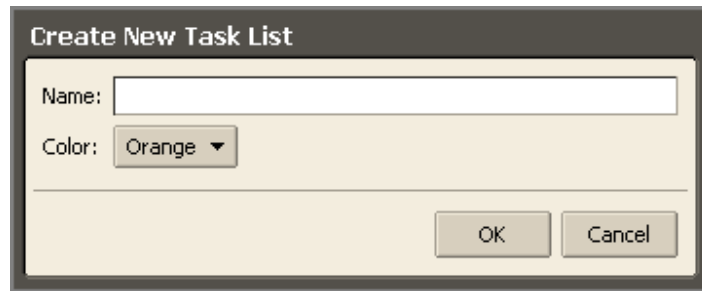
### Creating a New Task List

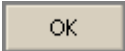
There are two ways to create a new task list:

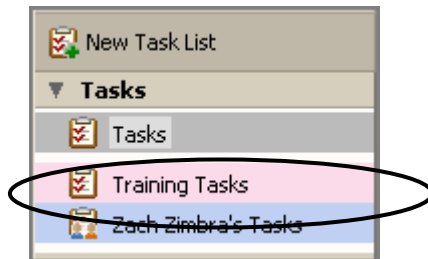
1. Click the arrow on  in the toolbar and select **New Task List**. This option is available from the **New** menu in any view, except the Preferences view.
2. Click on  above the Task List display.



Using either method, the **Create New Task List** dialog appears.

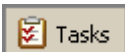




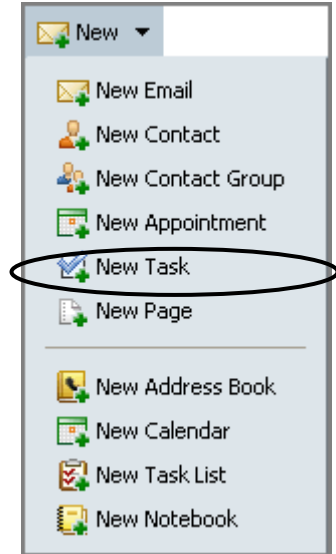
3. Enter a name for the task list in the **Name** field.
4. Select a color for the tasks on this task list.
5. Click . The task list is displayed in the task list display. In the example below, the new task list is **Training Tasks**, which is pink.



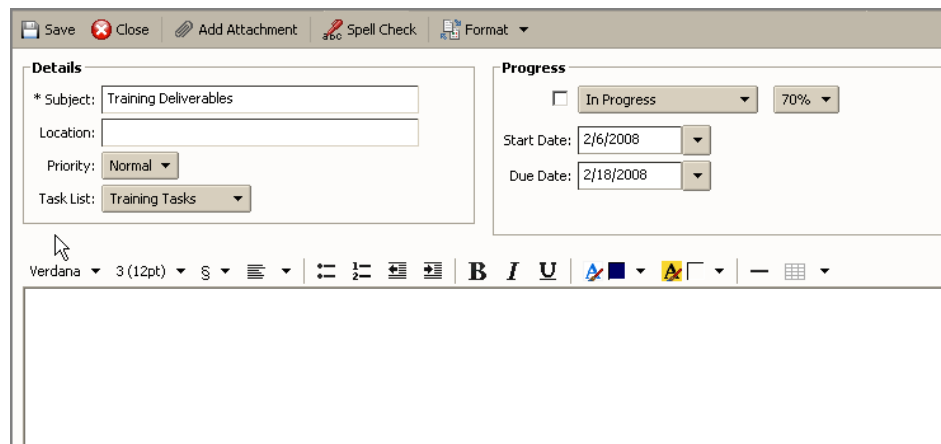
## Creating a New Task

There are two ways to create a task:

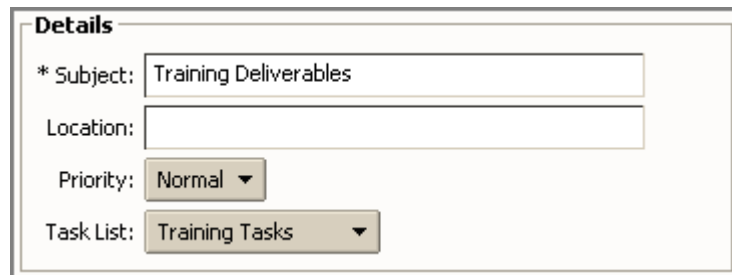
1. Click  on the toolbar and click .
2. Click the arrow on  in the toolbar and select **New Task**. This option is available from the **New** menu in any view, except the Preferences view.



The **Tasks Details** tab appears.

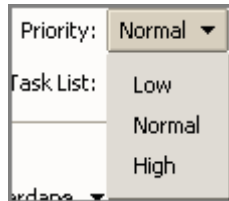


3. Specify the following information in the **Details** area:

A screenshot of the 'Details' area in Outlook. The 'Subject' field contains 'Training Deliverables', 'Location' is empty, 'Priority' is 'Normal', and 'Task List' is 'Training Tasks'.

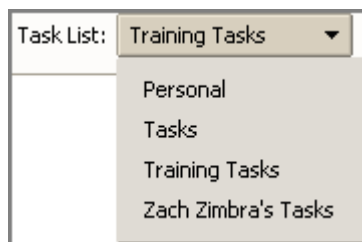
- **Subject.** Brief description of the task. The text added here becomes the description in the task list.

- **Location.** Where does the task occur, if applicable?
- **Priority.** Select the priority for this task.



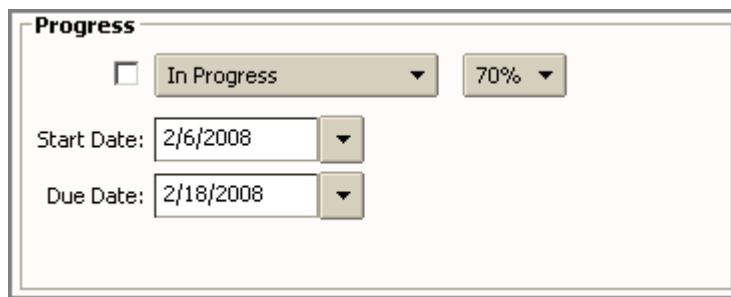
A screenshot showing two dropdown menus. The top one is labeled 'Priority:' and has 'Normal' selected. The bottom one is labeled 'Task List:' and has 'Normal' selected. A third dropdown menu is partially visible below it, showing 'High'.

- **Task List.** Select the task list where you want this task displayed.



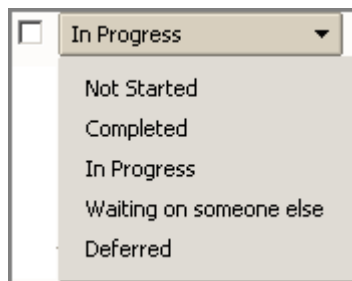
A screenshot of a 'Task List:' dropdown menu. The menu is open, showing four options: 'Training Tasks' (selected), 'Personal Tasks', 'Training Tasks', and 'Zach Zimbra's Tasks'.

Specify the following information in the **Progress** area:



A screenshot of a form titled 'Progress'. It contains a checkbox labeled 'In Progress' which is checked, followed by a dropdown menu showing '70%'. Below this are two date fields: 'Start Date:' with '2/6/2008' and 'Due Date:' with '2/18/2008', each followed by a dropdown arrow.

- **Status.** Select the status for this task. You can reopen this task and change this status at any time.






A screenshot of a status dropdown menu. The menu is open, showing six options: 'In Progress' (selected), 'Not Started', 'Completed', 'In Progress', 'Waiting on someone else', and 'Deferred'.

- **Percentage.** Select a percentage to go with the status of the task. You can reopen this task and change this percentage at any time.

4. Define the start and end day and time for the task.
5. Specify the following remaining information:
  - o **Body.** Type any notes to be included in the task list.

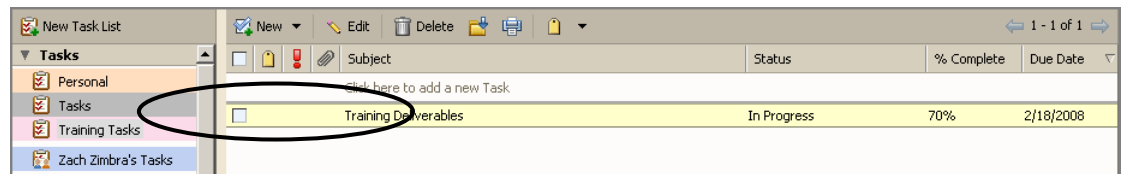
Options:

- Click  in the toolbar to include an attachment for the task.
- Click  in the toolbar to spell check the task body.
- Click .

## Adding a Task Quickly

**To quickly add a new task to a task list:**


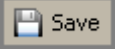
1. Open the task list to which you want to add a task. Double-click on the task list in the **Tasks** area of the Overview pane to open a task list.



2. Click Click here to add a new task.
3. Type a name for the new task and press **Enter**.

This adds the task subject to your task list, but it does not give any details. To add details, edit the task.

There are two ways to edit the task information:

- Double-click the task.
- Click the task and click  in the toolbar. The **Task Details** tab appears. Edit the information displayed and click .

If you add or create a task in the wrong task list, either:



- Open the task, and select the correct task list from the **Task Lists** drop-down.
- Drag and drop the task on the Content pane to the correct task list in the Overview pane.



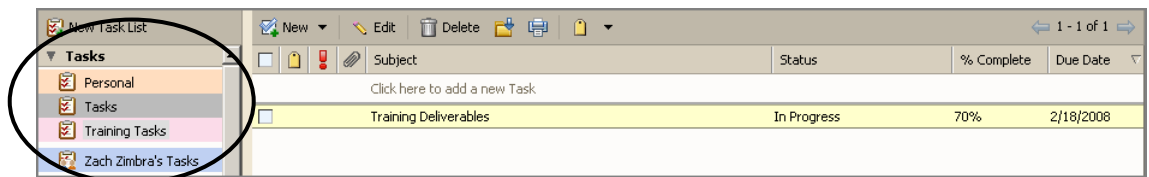
You can use Zimbra Assistant to quickly add a task while working within an email message, a meeting within calendar, or viewing a contact. When the task is created, any of the information that was available is added to the Task text area. For more information on Zimbra Assistant, refer to Chapter 1.


## Changing or Updating a Task

As you progress on a task, you may want to change its status and % complete information.

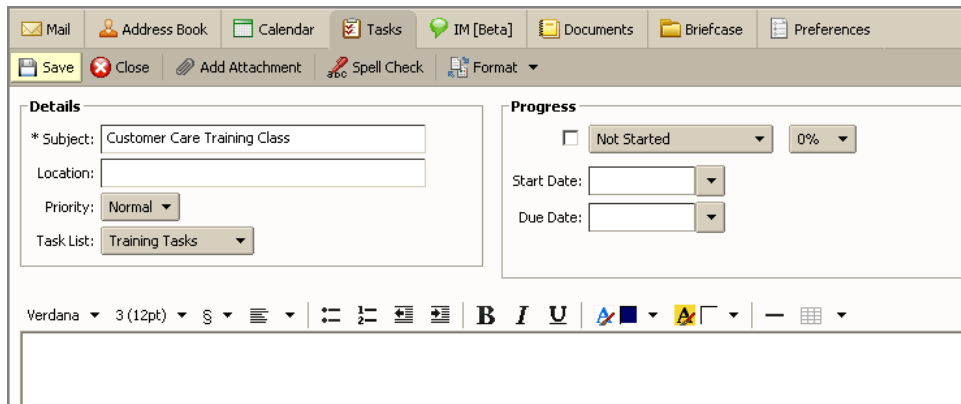
### To update a task:

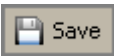
1. Open the task list you want to update. Double-click on the task list in the **Tasks** area of the Overview pane to open a task list.



2. Edit the task information using one of these two methods:
3. Double-click the task.
4. Click the task and click  in the toolbar.

The Task Details tab appears.



5. Edit the information displayed and click .

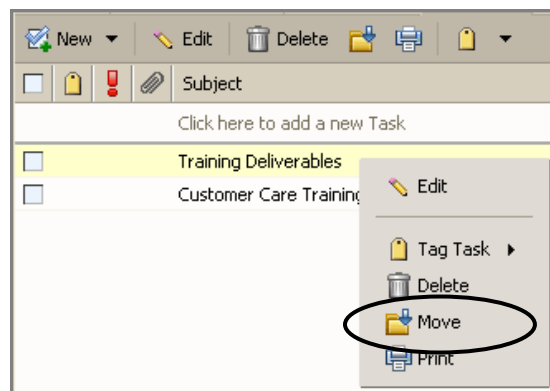
## Moving a Task

You can move a task to another list in one of the following ways:

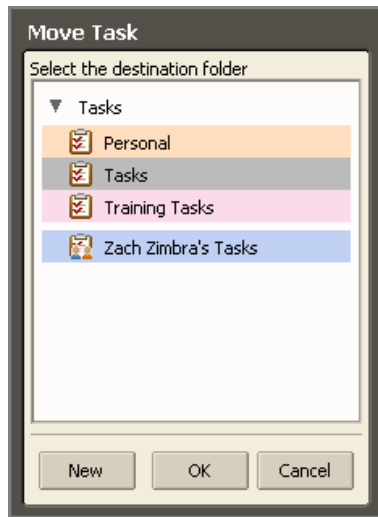
- Using the **Move** option from the right-click menu
- Using drag-and-drop
- Editing the task details

**To move the task using the Move option:**

1. Right-click the task and select **Move**.



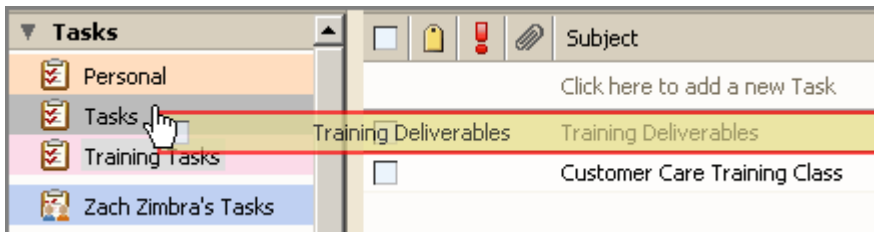
The **Move Task** dialog appears.



2. Select the task list to which you want to move the task and click **OK**.

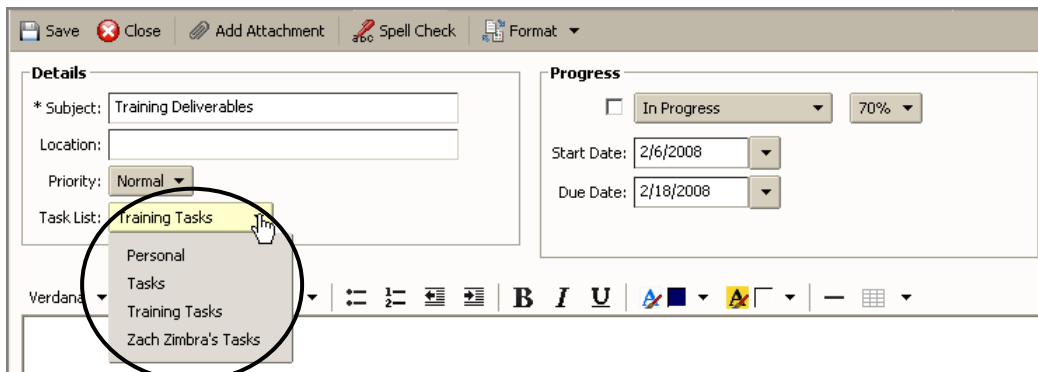
**To move the task with drag-and-drop:**

Select the task to move, hold down the left mouse button and drag the task to the lists in the Overview pane.



**To move a task by editing the task:**

Open the task page and in the **Task Lists** field, select the task list.

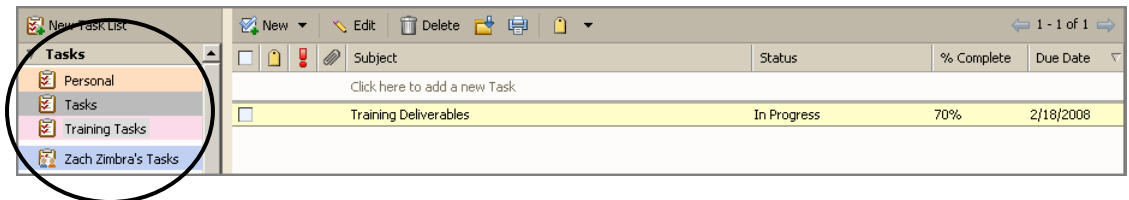




## Deleting a Task

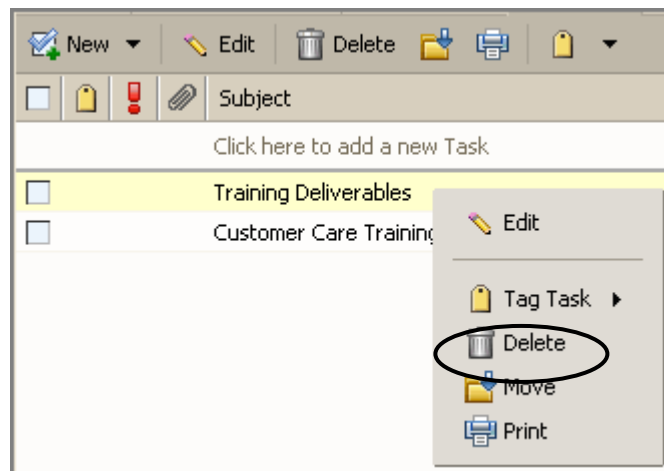
To delete a task from a task list:

1. Open the task list containing the task you want to delete. Double-click on the task list in the **Tasks** area of the Overview pane to open a task list.



Delete the task using one of the following methods:

2. Select the task to delete and click  **Delete** on the toolbar.
3. Right-click on the task and select **Delete**. Click **Yes** in the Confirmation dialog.

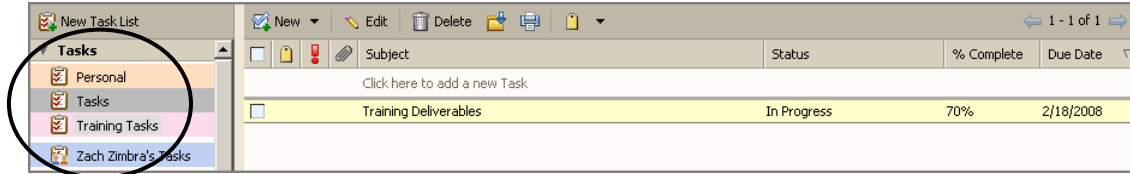


## Sorting Tasks

You can sort tasks in a task list by subject, status, percentage complete, and due date.

To sort tasks:

1. Open the task list containing the tasks you want to sort. Double-click on the task list in the **Tasks** area of the Overview pane to open a task list.



2. Click on any of the following column headers to sort the tasks by that column:
  - o Subject
  - o Status
  - o Percentage Complete
  - o Due Date

## Sharing Task Lists

You can share your task lists with other people in your office, with external guests, and with the public. When you share your task lists with internal users, you can select the type of access the internal users can have, either manager which gives full access to view and modify a task, or viewer, which gives read-only access. External guests and the public have read-only access.