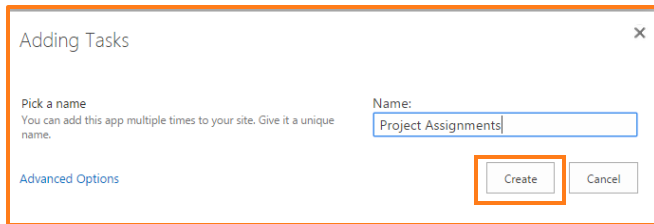


SharePoint Tasks

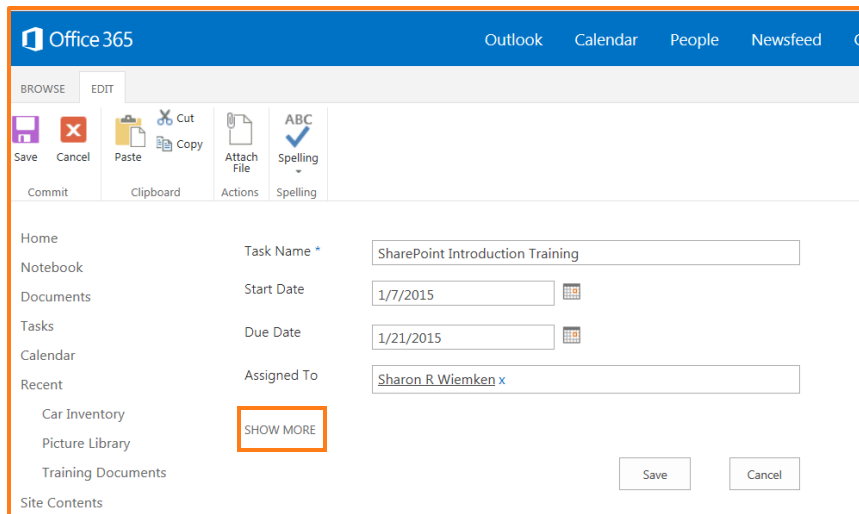
Create a Task List:

- On the upper right hand corner of the site, select the **Settings Menu icon** (looks like a gear)
- Choose **Add an App**.
- From the list of available apps, choose **Tasks**.
- A pop-up box will appear
- Enter a **Name** for your Task List
- Click on **Create**



Create a New Task

- Click on the **Task List** you just created on the left navigation under **Recent**.
- Click **+ new task**.
- This enables you to add action items in your project.
- To enter your first task, just type the **Name**, **Start Date**, **End Date**, and the **Person** to whom it is assigned.



- Click on **SHOW MORE** for more options

SharePoint Tasks

Office 365

BROWSE EDIT FORMAT TEXT INSERT

Clipboard Font Paragraph Styles Markup

Home

Car Inventory

Training Documents

Documents

Tasks

Calendar

Recent

Project Assignments

Site Contents

Recycle Bin

EDIT LINKS

Task Name * SharePoint Introduction Training

Start Date 1/7/2015

Due Date 1/21/2015

Assigned To Sharon R. Wiemken x

% Complete 80 %

Description Documentation complete
2nd run through went smoothly
Need to schedule classes and plan rollout

Predecessors

Priority (1) High

Task Status In Progress

Save Cancel

- Click on **Save** when complete

Modify the All Tasks View

The default All Tasks view does not include very many fields, next we will modify this view to include more fields.

- Click on the **ellipsis (...)** beside the Completed View and choose **Modify this view**.

Office 365 Sites

BROWSE TASKS LIST

Training Sandbox Sharon Wiemken Patrick EDIT LINKS

Jan29

Home

Car Inventory

Training Documents

Documents

Recent

Jan29

Project Assignments

Subsites

Sharon Wiemken

Patrick

Site Contents

Recycle Bin

EDIT LINKS

+ new task or edit this list

All Tasks Calendar Completed ... Find an item

Task Name Due Date Assigned To

SharePoint Introduct February 20 Sharon R Wiemken

Modify this View

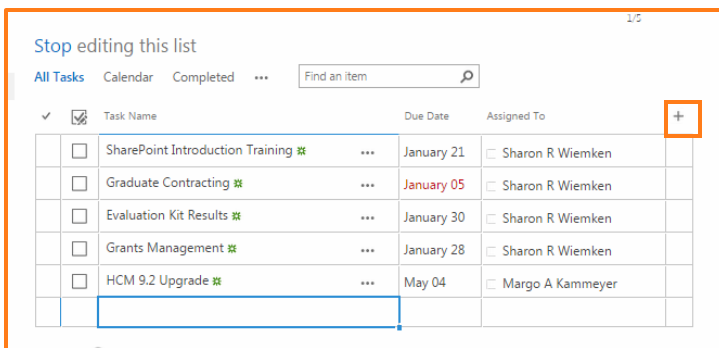
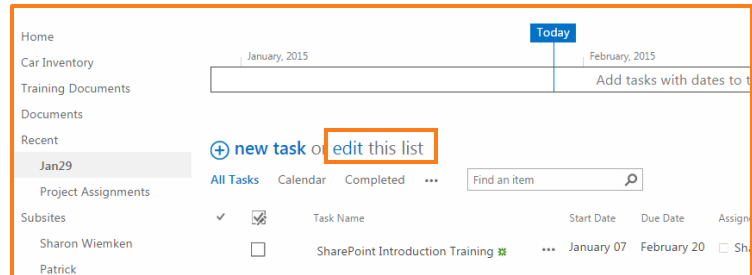
- **Check the boxes** for % Complete, Start Date and task Status. You can rearrange order if you like.
- Scroll to the bottom and click on **OK**

SharePoint Tasks

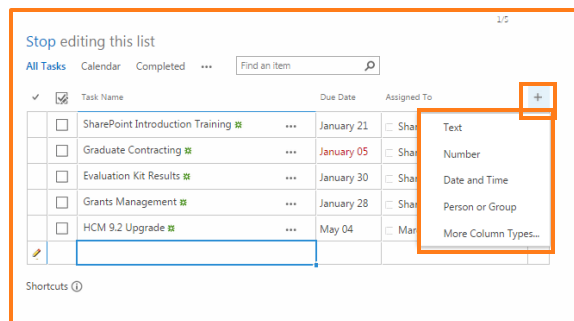
Edit the Task List

If you want to create several tasks quickly you can create from edit view. It is like a datasheet view where you can also add columns to this view dynamically.

- Click on **edit this list**



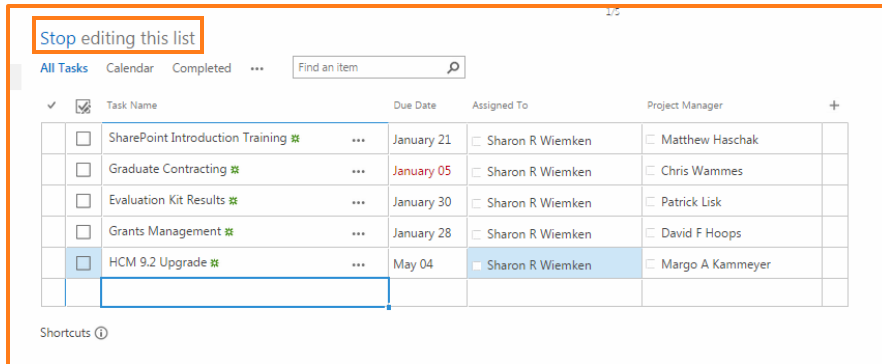
- Click on the **+** sign to add another column.



- Select the **column type**
- Give the column a **heading name**
- Fill in the blanks!

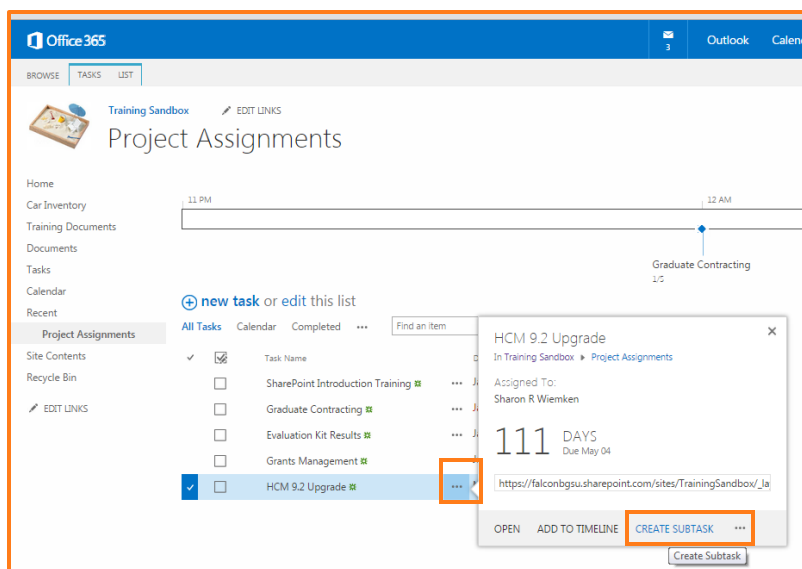
SharePoint Tasks

- Click on **Stop editing this list** when complete.



Create a Subtask

- You can also create **Subtasks** to keep track of smaller details in a larger project.
- To do this, click on the **Main Task** and then click on **ellipsis (...)** and choose **Create Subtask**.

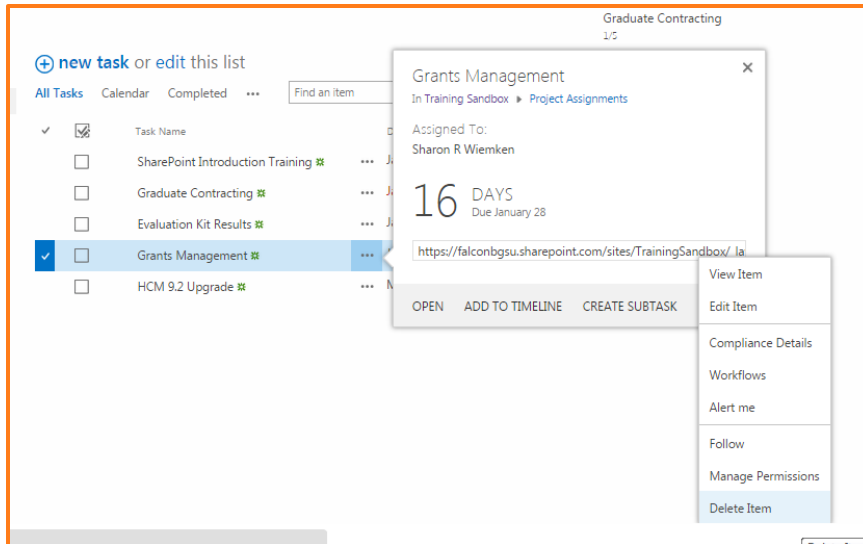


- Enter all of the information just like you would for a new task.
- Click on **Stop editing this list** when complete.

SharePoint Tasks

Delete a Task

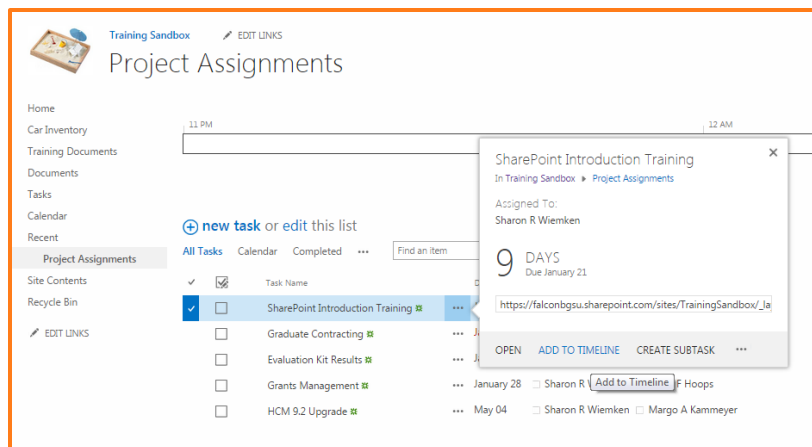
- Click on ... beside task you want to delete
- Click on ... again for the drop down menu
- Click on **Delete Item**



- Click on **OK** to confirm deletion

TimeLine

- Users have ability to display or remove tasks or subtasks from the timeline.
- Click on ... beside the task name
- Click on **Add to Timeline**
- You will need to do this for each task that you want added to the TimeLine.



SharePoint Tasks

The screenshot shows the SharePoint Tasks interface for a site named "Project Assignments". The top navigation bar includes "Office 365", "Outlook", "Calendar", "People", "Newsfeed", "OneDrive", "Sites", and "Tasks". The left sidebar shows the "Recent" section with "Project Assignments" selected. The main area displays a timeline view of tasks from December 2014 to April 2015. Tasks are represented as horizontal bars with labels indicating their duration and name. Below the timeline, there is a table view of the tasks.

Task Name	Start Date	Due Date	Assigned To	Project Manager	% Complete	Task Status
SharePoint Introduction Training	5 days ago	January 21	Sharon R Wiemken	Matthew Haschak	80 %	In Progress
Graduate Contracting	November 10, 2014	January 05	Sharon R Wiemken	Chris Wammes	90 %	In Progress
Evaluation Kit Results	Tomorrow	January 30	Sharon R Wiemken	Patrick Lisk	25 %	In Progress
Grants Management	November 17, 2014	January 28	Sharon R Wiemken	David F Hoops	5 %	In Progress
HCM 9.2 Upgrade	February 03	May 04	Sharon R Wiemken	Margo A Kammeier	0 %	Not Started

One of the other features of timeline is that now you can Color (highlight) the Tasks in the timeline.

- **Select the task** and click on the **Timeline Tab** at the top.
- **Format the task** with your color, font and highlight color. (The color choices will vary depending on your site theme.)

This screenshot shows the same SharePoint Tasks interface, but with the tasks color-coded to match the timeline bars. The tasks are: "Graduate Contracting" (green), "SharePoint Introduction Training" (blue), "HCM 9.2 Upgrade" (orange), "Grants Management" (pink), and "Evaluation Kit Results" (purple). The table view below the timeline also reflects these colors.

Task Name	Start Date	Due Date	Assigned To	Project Manager	% Complete	Task Status
SharePoint Introduction Training	6 days ago	January 21	Sharon R Wiemken	Matthew Haschak	80 %	In Progress
Graduate Contracting	November 10, 2014	January 05	Sharon R Wiemken	Chris Wammes	90 %	In Progress
Evaluation Kit Results	Today	January 30	Sharon R Wiemken	Patrick Lisk	25 %	In Progress
Grants Management	November 17, 2014	January 28	Sharon R Wiemken	David F Hoops	5 %	In Progress
HCM 9.2 Upgrade	February 03	May 04	Sharon R Wiemken	Margo A Kammeier	0 %	Not Started