Projects

Office

Quick Start Guide

Keep track of your tasks
A SharePoint tasks list is handy for keeping track of everything that needs to be done in a project. You can add start dates and due dates, assign tasks to people, and view the project on a timeline.

See tasks on a timeline
Add just a few tasks to the timeline to keep it simple, or add lots of tasks for an all-up look at your project. Change fonts and colors to help others understand your work.

Share your project with others
Choose **Share** to invite others to collaborate on your project.

Get to work
Quickly create new tasks or edit existing tasks in Quick Edit mode.

Try other views
Tasks lists have several views included. Take a look at your tasks on a calendar, view all tasks that have been completed, see only those tasks assigned to you, and more!

Mark tasks complete
As you finish work, select this check box to mark the task complete.

Office 365 — Outlook Calendar People Yammer OneDrive Sites — Molly Dempsey

BROWSE TASKS LIST — SHARE

Fall Conference — EDIT LINKS
Tasks

Home
Notebook
Documents
Tasks
Calendar
Site Contents
EDIT LINKS

Phase 1: Pre-conference
8/15 - 9/12

Phase 2: During the conference
9/14 - 9/19

Phase 3: Post-conference
9/23 - 9/27

August 20   August 26   September 01   September 07   September 13   September 19

Start Prepare booth props
8/15   8/15 - 9/10

Print materials for distribution
9/1 - 9/10

Travel t...   Bo... Bo... Ta... Tr...
9/13 - 9/1   9/16 9/17 9/18 9/19
Se...
9/14
Fi... Fi...
9/16 9/17

Follow up on custo...   Finish
9/23 - 9/27   9/27

Send out marketing materials
8/15

Ship booth materials to conference
9/12

Send thank-you postcards
9/27

⊕ new task or edit this list

All Tasks   Calendar   Completed

✓	☑	Task Name		Due Date	Assigned To
	☐	⊿ Phase 1: Pre-conference	•••	September 12	☐ Molly Dempsey ☐ Sara Davis
	☑	~~Send out marketing materials~~	•••	August 15	☐ Molly Dempsey
	☑	~~Prepare booth props~~	•••	September 10	☐ Sara Davis ☐ Molly Dempsey
	☑	~~Print materials for distribution~~	•••	September 10	☐ Molly Dempsey
	☑	~~Ship booth materials to conference~~	•••	September 12	☐ Sara Davis
	☐	Travel to conference	•••	September 15	☐ Sara Davis ☐ Molly Dempsey ☐ Bonnie Kearney ☐ Pavel Bansky
	☐	⊿ Phase 2: During the conference	•••	September 19	☐ Sara Davis ☐ Molly Dempsey ☐ Pavel Bansky ☐ Bonnie Kearney
	☐	Set up booth	•••	September 15	☐ Molly Dempsey

**Microsoft**

How can I add a tasks list to my site?

Tasks lists are included by default on project sites. You can also add them to a team site.

1. Under **Get started with your site**, choose **Working on a deadline?**.
2. Choose **Add Them** to add the Tasks and Calendar apps to your site.
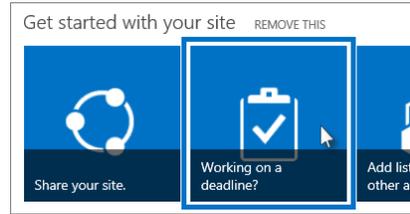
Add tasks to your project

1. Choose **Tasks** > **edit**.
2. Fill out the **Task Name**, **Due Date**, and **Assigned To** columns. Press **Enter** to move to a new row.
3. When you're done, choose **Stop** editing.
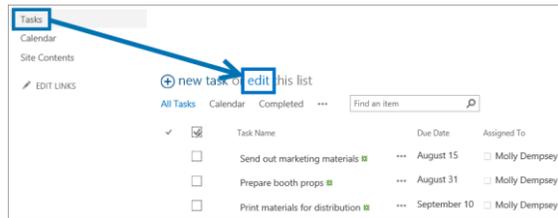
Indent, outdent, or move a task in the list

Select the tasks that you want to indent, outdent, or move within the list, and then choose **Tasks** > **Indent**, **Outdent**, **Move Up**, or **Move Down**.
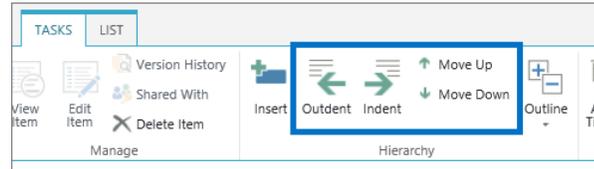
You can also drag a task to move it within the list.

1. At the top of the tasks list, choose **edit**.
2. Drag the task to its new spot. A blue line shows where the task will be moved when you are done.
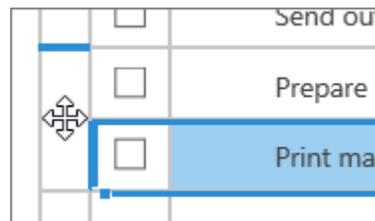
Add details about a task

1. Choose the ellipses (**...**) for a task, choose the ellipses (**...**) on the box that appears, and then choose **Edit Item**.
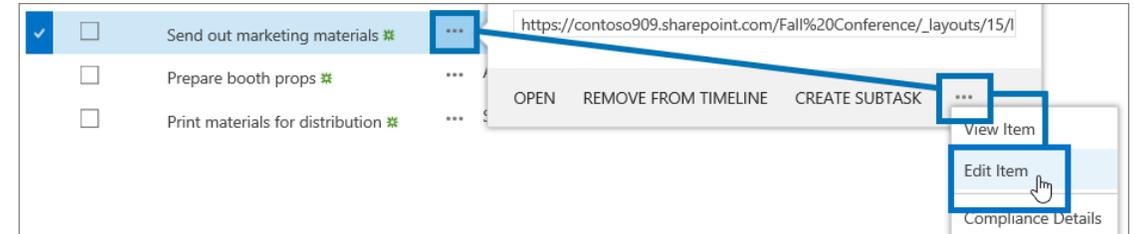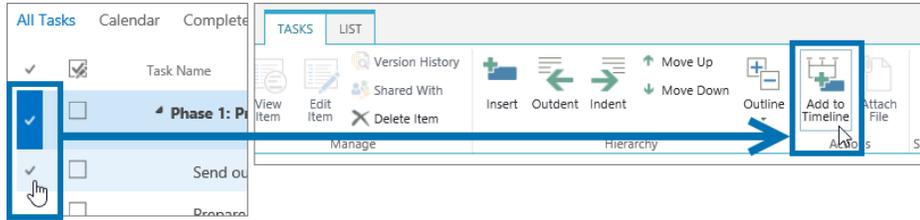
2. Fill out the details that you want to add, such as **Start Date** or **% Complete**.

3. Choose **Show More** to add a **Description**, select which tasks come before this one (**Predecessors**), add a **Priority**, or update the **Task Status**.
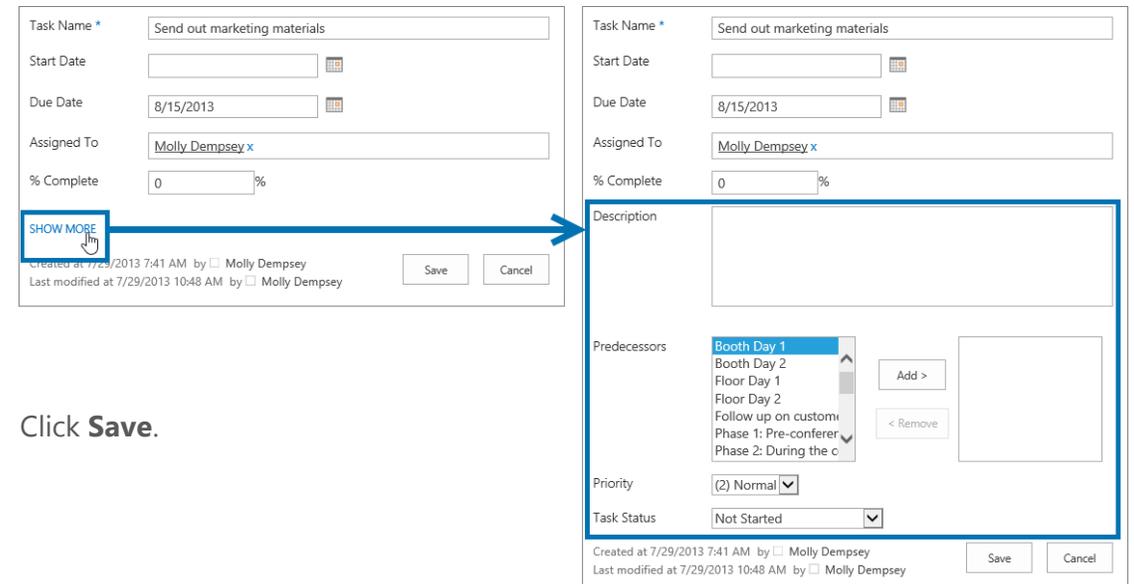
4. Click **Save**.

Add tasks to the timeline

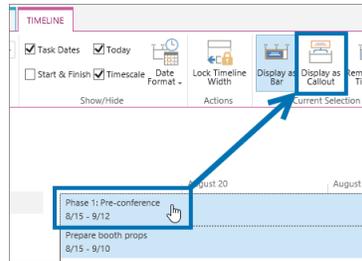Select each task, and then click **Tasks** > **Add to Timeline**.

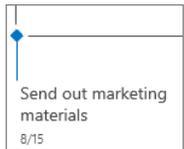# Show a task above or below the timeline

When you show a task above or below the timeline, you make it a *callout*.

Choose the task, and then choose **Timeline** > **Display as Callout**.

You can drag the callout to a different spot above or below the timeline, if needed.
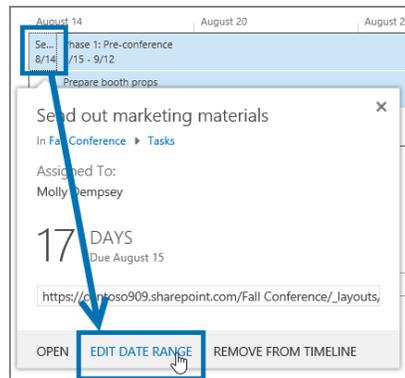

Add a milestone

A *milestone* is a task that represents a certain point in your project.

Milestones are shown on the timeline as a diamond with a callout.

To make a task a milestone:

1. Choose the task on the timeline, and then choose **Edit Date Range**.
2. Delete the **Start Date** for the task, leaving only the **Due Date**.
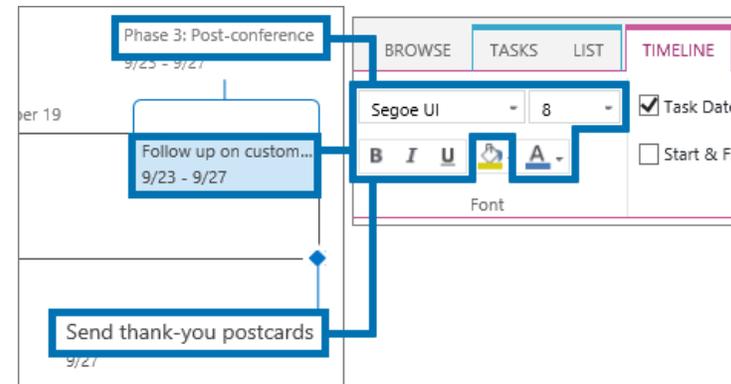

Change the fonts and colors on the timeline

Click the bar or diamond on the timeline that you want to change, and then use the **Timeline** > **Font** options to make changes.
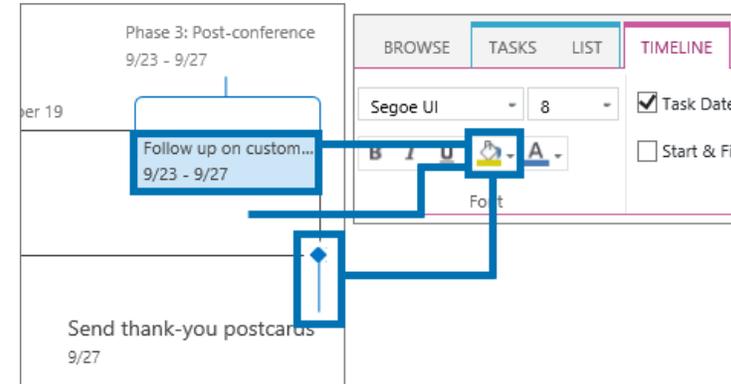

To change the color of a bar, a diamond, a callout line, or the background of the entire timeline, click that portion of the timeline, and then click **Highlight Color**.
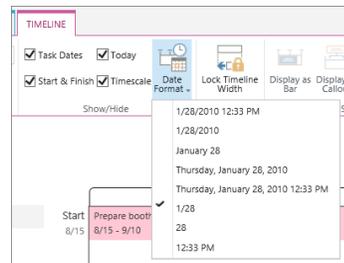

To change the font face, size, format, or color used on a callout or timeline bar, click that portion of the timeline and then use the options in **Timeline** > **Font**.

Change how dates are displayed

Select the check boxes in **Timeline** > **Show/Hide** to choose what dates are displayed.
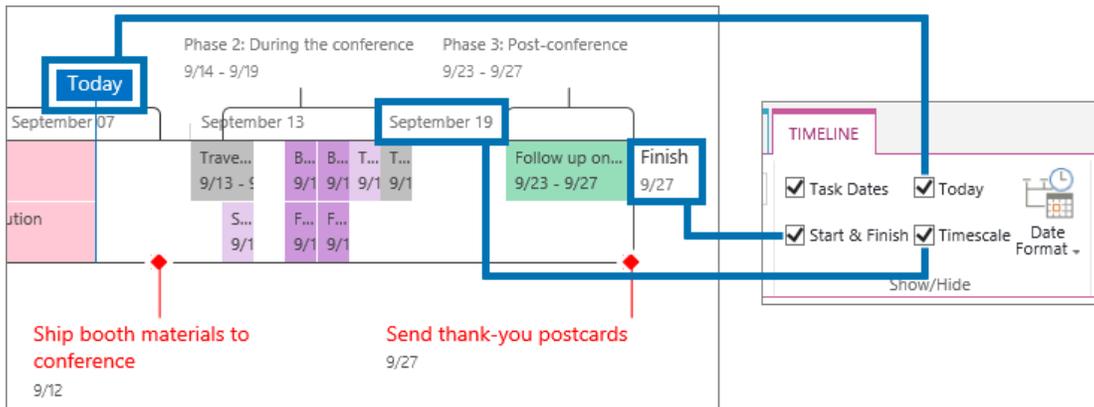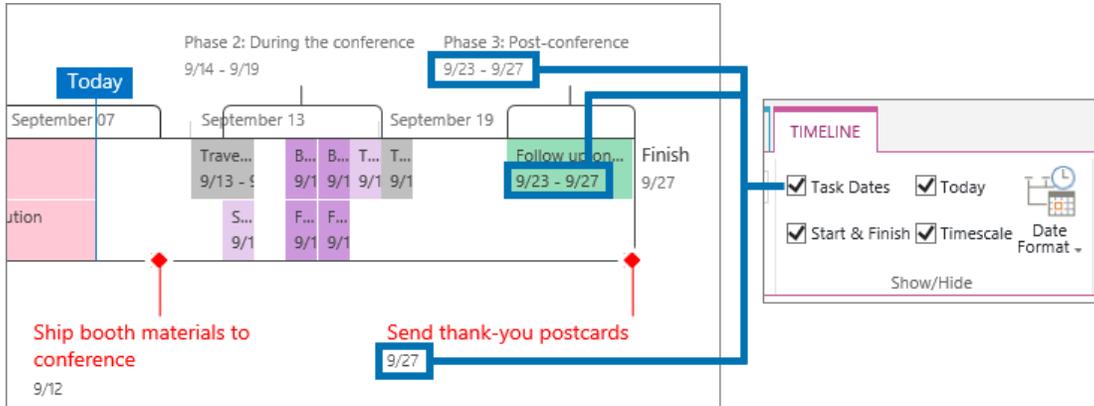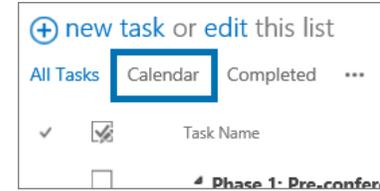

You can also choose **Timeline** > **Date Format** to select how you want your dates displayed.
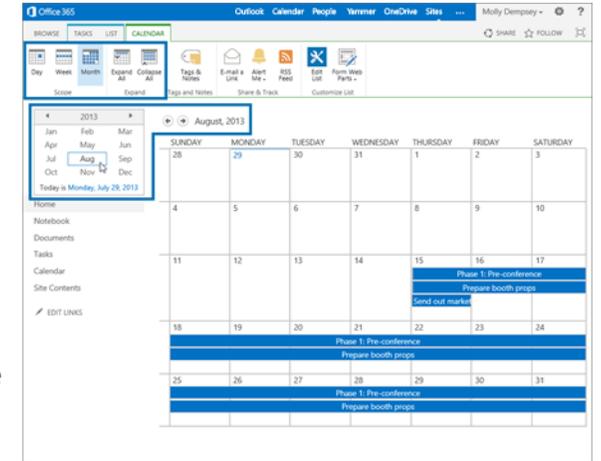

View tasks on a calendar
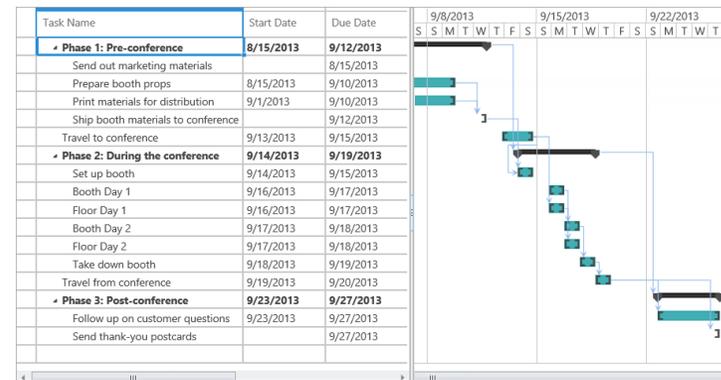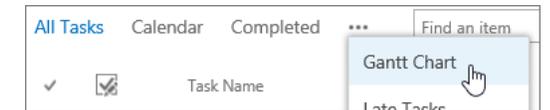
At the top of the tasks list, choose **Calendar**.

Use the options on the **Calendar** tab to change the displayed dates, and use the months and arrows on the **Calendar** view to move through time.

View tasks on a Gantt chart

A *Gantt chart* is a way to look at tasks across time, including how each task relates to other tasks in the project.

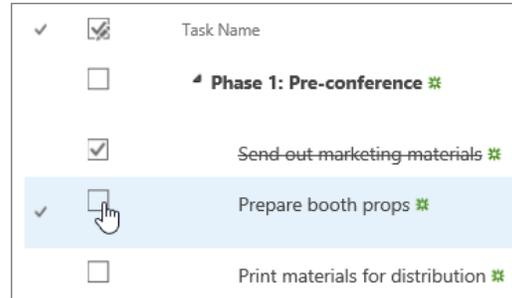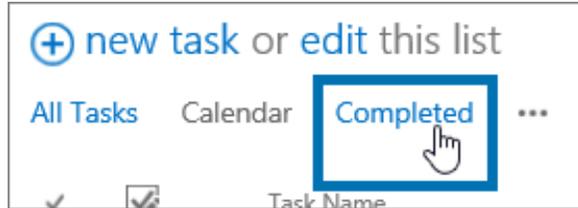At the top of the tasks list, choose the ellipses (**...**), and then choose **Gantt Chart**.

Arrows on the Gantt chart indicate when one task follows another.
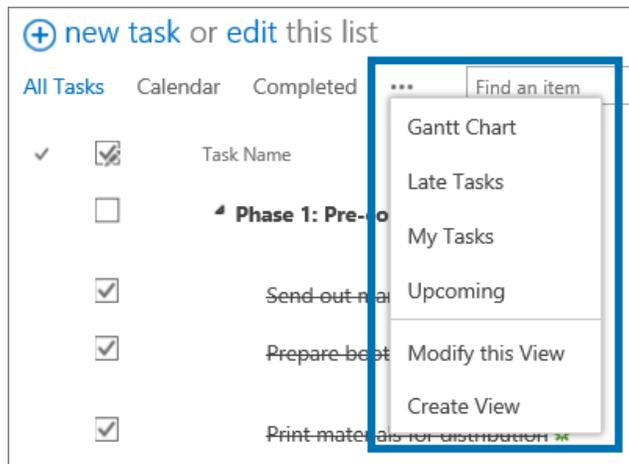
Mark a task complete

As you finish work on the project, select the check box next to each completed task.

To view all completed tasks, at the top of the tasks list, choose **Completed**.


Other ways to view the project...

There are a few other views that you can use to look at the project. Choose the ellipses (**...**) and then choose **Late Tasks**, **My Tasks**, or, **Upcoming** to open those views.

You can also choose **Modify this View** to change the view that is currently displayed, or choose **Create View** to customize how you view the project's tasks.

Remove a task from the timeline

Choose the bar or diamond that you want to remove from the timeline, and then choose **Remove from Timeline**.
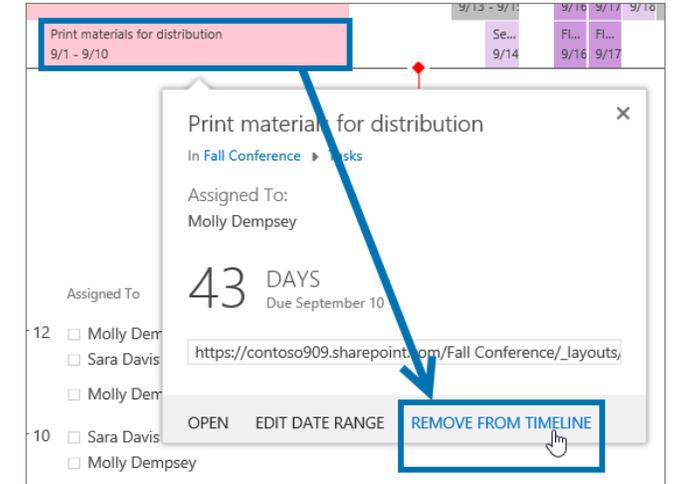
Delete a task from the project

There are multiple ways to delete tasks from your project.

Here's the quickest way:

1. Select the tasks you want to delete.

2. Choose **Tasks** > **Delete Item**.

You can also choose **edit**, select the tasks you want to delete, and then press **Delete** on your keyboard.