Tasks—Basics

A task is a discrete work item that a single person can be assigned. Tasks can be organized into lists that display a collection of tasks in relation to a project.

Tasks overview

1. Tasks can be added to SharePoint lists so that projects and assignments can stay organized.
2. A new task list can be added at any time to store team or personal tasks.
3. On a task list, new tasks can easily be added and assigned to team members.
4. Tasks can be edited and shared in the Manage group.
5. To better organize your tasks, use the commands available in the Hierarchy group.
6. You can also set an alert for a task to be notified when changes have been made to it.
7. If you have the right permissions level, you can add a workflow to a task, and approve and reject items.
8. The timeline provides a useful, visual overview of your project, and helps you highlight important deadlines and milestones.

Add a new task

1. In the left navigation pane, click Site Contents.
2. Click the appropriate Task List.
3. Click New Task.
4. In the Task Name field, enter a name for the task.
5. In the Start Date field, enter the appropriate start date.
6. In the Due Date field, enter the appropriate due date.
7. In the Assigned To field, enter the appropriate name or email address.
8. Select the appropriate contact.
9. To add additional information, click Show More.
10. Enter the appropriate information.
11. When finished, click Save.

Edit a task

1. In the left navigation pane, click Site Contents.
2. Click the appropriate Task List.
3. Click the task you want to edit.
4. Click the View tab.
5. In the Manage group, click Edit Item.
6. Make the appropriate changes.
7. When finished, click Save.

If you need more help, please reach out to your division's FSSA Super User or send an email to SharepointRequests@fssa.in.gov with a description of your issue.

Delete a task

1. In the left navigation pane, click Site Contents.
2. Click the appropriate Task List.
3. Next to the appropriate task, click the Open Menu icon.
4. Click the More Actions icon.
5. Select Delete Item.
6. Click OK.

View a task

1. In the left navigation pane, click Site Contents.
2. Click the appropriate Task List.
3. Next to the appropriate task, click the Open Menu icon.
4. To view more information, select the More Actions icon.
5. Select View Item

View who this task is shared with

1. In the left navigation pane, click Site Contents.
2. In the Site Contents area, locate and select the appropriate Task List.
3. In the Tasks list, select the appropriate task name.
4. Select the View tab.
5. In the Manage group, click Shared With.