



## Five Minute Rapid Start Guide

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A task is something you have to do, such as write a letter, or wash the car. You can predict and manage your workload effectively, and give yourself focus, by creating a list of all your tasks in Microsoft® Outlook® and then automatically scheduling them using Taskline.


To schedule your tasks for the first time:

1. In Outlook, open your **Tasks** folder.
2. Enter how long you think each task will take. To do this, first open an existing task in Outlook, for example by double clicking it, or create a new task by clicking:
  - Outlook 2010 – **Home** tab → **New Items** → **Task**
  - Outlook 2013 – **HOME** tab → **New Items** → **Task**
  - Outlook 2016 and Outlook 2019 – **Home** tab → **New Task**
3. On the **Taskline** tab of the task form, enter how long you think the task will take in the **Total Work** box, which is set to 0 by default. If you don't yet have a **Taskline** tab, use the **Details** tab. You can enter the **Total Work** as a number of minutes, hours, days or weeks; the abbreviations are m, h, d and w. For example, to set **Total Work** to 3 hours, you can type "3h" or "3 hours". When you have updated **Total Work**, click **Save and Close**.
4. Once you have assigned each task some **Total Work**, start Taskline by clicking the  **Settings** button on the Outlook ribbon.
5. Click **OK** on the Taskline Settings dialog to accept the default options and schedule your tasks.
6. When Taskline has finished, double-click a task to display the **Taskline** tab. Notice that Taskline has calculated **Scheduled Start** and **Scheduled End** dates and times for each task. The **Scheduled Start** is the recommended, or most likely, start date. Similarly, the **Scheduled End** is the calculated completion date. [More about these dates.](#)
7. Taskline will also place task entries in Outlook's calendar. These are entries in the calendar that represent your tasks. Task entries make it very easy to see what you are scheduled to do on any given day. Open your Outlook calendar and take a look! If you don't see task entries in your calendar and you would like them:
  1. Start Taskline by clicking the  **Settings** button in Outlook
  2. Click the **Calendar** tab on the Taskline Settings dialog
  3. Select the **Create for tasks that are Not Started or In Progress** check box
  4. Click **OK** to have Taskline reschedule your tasks[More on calendar task entries.](#)
8. You will probably want your tasks to be carried out in a certain order. One way of setting this order is to give each task a **Priority (A1)** value. Open each task that you want to schedule and give it a **Priority (A1)** value, which is set on the **Taskline** tab of the task form in Outlook. For example, give the first task that you want to do a **Priority (A1)** value of B10, the second task B20, and so on. Now start Taskline again. On the **Tasks** tab of the Taskline Settings dialog, set **Order by** to **Priority (A1)**, then click OK. Your tasks will now be rescheduled in the order you have set.

Scheduling tasks using **Natural Order** is another popular method of setting the

task order. Tasks in Outlook have a natural order, which is the order Outlook displays them in when sorting and grouping is turned off. The benefit of using natural order is that task ordering can be changed simply by dragging tasks, or groups of tasks, up and down the task list. This method can often be quicker than changing priority values.

Notice that there are two main workflows in Taskline:

- To set options on individual Taskline tasks, such as a scheduling constraint or the **Total Work**, open the task in Outlook and set these options on the [Taskline tab](#).
- Click  [Settings](#) on the ribbon in Outlook If you want to:
  - Change the way Taskline schedules your tasks, such as the task sort order, your **Working Hours**, manage **Projects**, control the creation of tasks in the calendar and so forth
  - Run secondary Taskline methods, such as import tasks or renumber tasks
  - Have Taskline schedule your tasks. This happens when you click **OK**

Some time management advice:

- You must leave some free time in your schedule, to allow for unforeseen items, or small items such as phone calls which cannot be scheduled individually but nevertheless collectively consume time. Scheduling yourself for every minute of your work day is not viable and you will inevitably fall behind schedule if you do this. You can build slack time into your schedule by setting the **Start work** and/or the **Stop work** times conservatively, or by adding **day time breaks** specifically for slack time. All these settings are on the **Working Hours** tab of Taskline's Settings dialog. Another useful method is to overestimating task **Total Work** times.

Some other things you can do are:

- If you have a simple list of tasks created using a text editor, word processor or similar you can have Taskline convert this list into Outlook tasks [How?](#)
- Read or work through the [Taskline tutorial](#)
- Use **Natural Order** to set the order in which tasks are scheduled [How?](#)
- Tell Taskline when you wish to start working on your task list [How?](#)
- Force a task to start or finish on, before or after a certain date. You do this by placing a **constraint** on the task. [More](#). Note that setting a task's **Start** or **Due** date has no effect on the way Taskline schedules tasks
- Have Taskline update the task **Start** and **Due** dates, as well as **Scheduled Start** and **Scheduled End** [How?](#)
- Tell Taskline what days you work, and what hours you work on those days, so that Taskline can accurately schedule your work. You enter this information on the **Working Hours** tab of the Taskline Settings dialog [How?](#)
- Limit the amount of time allocated to a task per day or per week, for example to spread a longer task out over several days or weeks, rather than working on it exclusively until it is completed [How?](#)
- Manually override some or all of Taskline's scheduling by [Pinning](#) tasks or parts of tasks in Outlook's calendar
- Update the tasks table view in Outlook to show task information particularly relevant to Taskline tasks, such as the **Scheduled Start** and **Schedule End** dates, **Priority (A1)** and **Total Work** [How?](#)
- Structure your tasks into a hierarchy and see summary information for each part of that hierarchy [How?](#)

- Read some useful tips and guidelines on [Planning Your Work](#) effectively
- Find out [how Taskline can help you](#)

You may also wish to view the [Taskline Quick Start Guide](#) video.

## What Taskline Can Do For You

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A task is something you have to do, such as fill in your expenses claim, or paint the bedroom. Many people write down all their tasks on a piece of paper, to create a to-do list. Outlook's task list is a computerized version of this paper to-do list. The standard Outlook task list allows you to create tasks, display them in a list and delegate them to others. However, Outlook cannot automatically schedule tasks. So, beyond the current task, you do not know when anything will get completed, or should be started. You do not know if deadlines can be met. This is where Taskline can help.

If you place appointments in Outlook's calendar, Taskline can put the tasks there too, so that you have one view that graphically details everything you have to do, and when. Taskline can keep the calendar automatically updated as things change.

Taskline accomplishes a similar job to expensive project management applications; it offers much of the power of critical path analysis, but without the complexity. Taskline gives you answers to fundamental time-planning questions, such as:

1. When should I start each task, and when can I expect to finish?
2. When will I finish the project I'm currently working on?
3. Are all my deadlines actually achievable?

With Taskline, you can also quickly re-schedule your tasks, in response to changing priorities or new commitments. Unfinished tasks are automatically carried forward. Is it possible to complete that new assignment by the required deadline, given all your existing commitments? Taskline can tell you.

Taskline organizes your schedule in the following ways:

- Assigns each task a recommended, or most likely, start and end date and time. This process is called **Task Scheduling**. Such scheduling takes into account:
  - Preferred task order
  - Your normal working week, and breaks during the day, such as lunch breaks
  - The other commitments in your calendar, such as meetings and holidays
  - Travel time to and from meetings and other appointments
  - External influences on tasks, such as deadlines
- Tells you when you can expect to finish your task list and each part of it
- Tells you how new work will affect your existing commitments
- Tells you whether deadlines are achievable
- Carries forward unfinished tasks, rescheduling them for a future date. Nothing gets forgotten
- Gives you the expected dates of milestones, or goals, which are significant events in your task list, such as finishing a package of work
- Issues enhanced reminders when or before tasks are due to start
- Tracks tasks that are complete or in progress
- Keeps a record of your completed work
- Optionally displays your tasks in Outlook's calendar, so that you have one view that graphically shows everything you have to do, and when
- Visually distinguishes categories of Tasks on Outlook's Calendar so that you can glance at the Calendar and visually know the status, or category, or project etc of each task

- Allows you to structure your tasks into a hierarchy and see summary information for each part of that hierarchy
- Allows you to assign each task to a project, to help you organize your tasks more effectively
- Gives you a detailed report summarizing past and future task information

To learn the capabilities of Taskline, read or work through the [Taskline tutorial](#).

## Taskline Tutorial

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As well as reviewing this tutorial, you may also wish to view the [Taskline Quick Start Guide](#) video.


This tutorial will bring you quickly up to speed with Taskline. The first 4 activities, which cover Taskline basics, take approximately 30 minutes to complete. The remaining activities will take a further 25 minutes. Completing these will enable you to get the most out of Taskline.

The tutorial describes basic activities in Taskline that you might want to accomplish in the typical work week. The tutorial uses the example of a technical writer in a large corporation. However, all of the activities are familiar ones that you might encounter in most professional settings or your personal life.

### Important

- This tutorial is designed for Taskline Professional Edition only. If you are using the evaluation version of Taskline, make sure you are using Professional edition. If necessary, select the **Professional edition** radio button on the **Help / About** tab of Taskline's Settings dialog, and then click **Apply**, to change Taskline versions.


### Note

- While running through this tutorial, we recommend that you open this help file by either clicking the **Taskline Tutorial** button on the **Help / About** tab of Taskline's dialog, or clicking the help button  on the Taskline section of the ribbon in Outlook. Using either of these methods will leave the help file open even when Taskline closes.

In our tutorial, the first three activities describe how to begin using Taskline:

- Entering the times that you work each week. You generally do this just once when you first start using Taskline.
- Planning specific tasks, including the estimated time for each task.
- Scheduling your work and showing your tasks in your Outlook calendar.

You use two workflows in Taskline:

- To set options on individual Taskline tasks, such as a scheduling constraint or the **Total Work**, open the task in Outlook and set these options on the [Taskline tab](#).
- Click  [Settings](#) on the ribbon in Outlook If you want to:
  - Change the way Taskline schedules your tasks, such as the task sort order, your **Working Hours**, manage **Projects**, control the creation of tasks in the calendar and so forth
  - Run secondary Taskline methods, such as import tasks or renumber tasks
  - Have Taskline schedule your tasks. This happens when you click **OK**

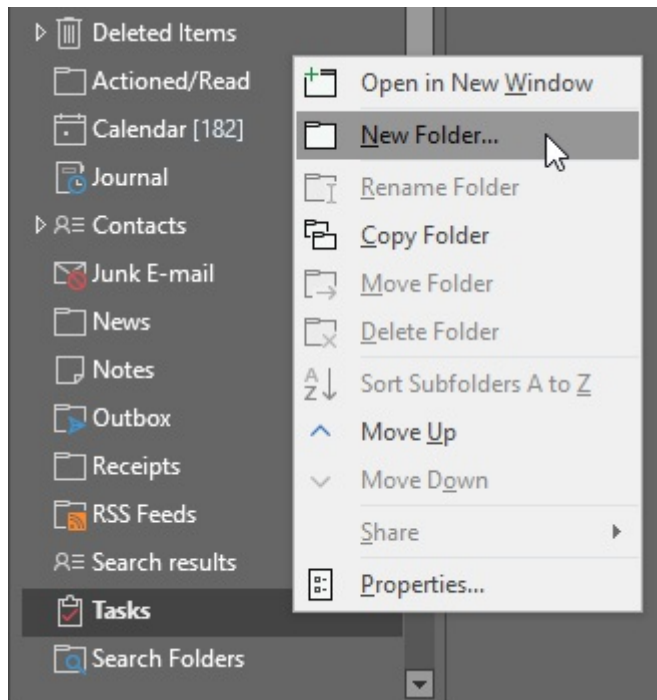
## Create New Folders for the Tutorial Tasks and Appointments

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For the purposes of this tutorial, we will create a new Outlook folder to contain the tutorial tasks and a second new folder for the tutorial appointments. This is to avoid existing tasks and appointments being intermingled with the items created during the tutorial. We will make these folders sub-folders of the existing **Tasks** and **Calendar** folders.

To create the new tasks folder:

1. If Outlook's **Folder List** isn't already displayed, [have Outlook display it](#).
2. On the **Folder List**, right click your **Tasks** folder and click **New Folder** on the pop up menu:




The **Create New Folder** dialog will be displayed.

3. Type "Tutorial Tasks" in the **Name** box, which is the name of our new folder. Make sure that **Folder contains** shows **Task Items** and that the **Tasks** folder is selected in the **Select where to place the folder** list.
4. Click **OK** to have Outlook create the new folder.

To create the new calendar folder:

1. On Outlook's **Folder List**, right click your Calendar folder and click **New Calendar** on the pop up menu.
2. Type "Tutorial Cal" in the **Name** box. Make sure that **Folder contains** shows **Calendar Items**.
3. Click **OK** to have Outlook create the new folder.

Now we need to tell Taskline to use the folders we have just created:

1. Click  [Settings](#) in Outlook to start Taskline.
2. On the **Tasks** tab of the Taskline Settings dialog, click the **Select** button for the **Schedule the tasks in** option. This will display the **Select Folder** dialog.
3. Select the **Tutorial Tasks** folder. You may need to click the **+** or **▶** sign, to the left of the **Tasks** folder entry, to display the **Tutorial Tasks** folder. **OK** the **Select Folder** dialog.
4. On the **Calendar** tab of the Taskline Settings dialog, click the **Select** button for the **My appointments are in** option.
5. Select the **Tutorial Cal** folder and click **OK**.
6. Still on the **Calendar** tab, click the **Select** button for the **Write task entries to**

option. This selects the Outlook Calendar that where your tasks will be shown. It is usual that both these options are set to the same Calendar folder, so that you get one view that displays both your diary information and your task list. However, you can separate these things if you prefer.

7. Select the same **Tutorial Cal** folder and click **OK**.
8. Back on the Taskline Settings dialog, click the **Apply** button to save these changes.

### Tip

- For more information about options and settings on any dialog, click the **? Question Mark** button at the top right hand corner of the dialog and then click any setting.

We have now finished the initial tutorial housekeeping.


## Entering Your Working Hours

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### Note

- Times in this tutorial are shown using a 12 hour AM/PM format. If you are using a different time format, please convert to your local format when entering times.

When using Taskline for the first time, you must tell Taskline the hours that you work. In our tutorial example, as a technical writer for a large corporation, your typical week runs from 9:00 AM until 5:00 PM, Monday through Friday, with a one-hour break starting at 12:00 PM.

1. If the Taskline Settings dialog is not currently open, click  **Settings** in Outlook.
2. Click the **Working Hours** tab on the Settings dialog, then enter the following information:
  - In the **Working hours** drop down list at the top of the dialog, make sure **Standard work week** is selected. If it is not, select it now.
  - Taskline supports working different hours on different days of the week, but in our tutorial example we will work the same hours Monday through Friday. The **Mon, Tue, Wed, Thu** and **Fri** check boxes should already be selected. The **Sat** and **Sun** check boxes should *not* be selected. If this is not the case, make these selection changes now. The check boxes allow you to enter the time for different weekdays simultaneously, typing the information only once.
  - In the **Mon** row of the **Start work** column of edit boxes, enter "9 AM". You can omit this step if all five **Mon** to **Fri** boxes already show "9 AM".
  - In the box to the right, the **Stop work** column, enter "5 PM". You can omit this step if all five **Mon** to **Fri** boxes already show "5 PM".
  - In the next box, the **From** column, enter "12 PM". This is the time your lunch break starts.
  - In the next box, the **To** column, enter "1 PM". This is the time your lunch break ends.
  - Make sure that both **Default hours** and **Schedule tasks that have been assigned these hours** are selected.
3. The **Working Hours** tab should now look like the following screen shot. Click **Apply** to save your settings and click **Cancel** to close the Settings dialog.



The screenshot shows the 'Taskline Settings' dialog box with the 'Working Hours' tab selected. The 'Default work week' is set to 'Default work week'. The 'Working day' section shows a table for the week of Monday to Sunday. Monday through Friday are checked, with start times at 9:00 AM and stop times at 5:00 PM. A break is scheduled from 12:00 PM to 1:00 PM. Saturday and Sunday are unchecked. The 'Breaks during the day' section shows the '1st break' selected. The 'Schedule tasks during these appointment types' section has 'Free' checked. The 'Options' section has 'Default hours' and 'Schedule tasks that have been assigned these hours' both checked. The 'OK' button is highlighted.

Working day	Start work	Stop work	From	To
<input checked="" type="checkbox"/> Mon	9:00 AM	5:00 PM	12:00 PM	1:00 PM
<input checked="" type="checkbox"/> Tue	9:00 AM	5:00 PM	12:00 PM	1:00 PM
<input checked="" type="checkbox"/> Wed	9:00 AM	5:00 PM	12:00 PM	1:00 PM
<input checked="" type="checkbox"/> Thu	9:00 AM	5:00 PM	12:00 PM	1:00 PM
<input checked="" type="checkbox"/> Fri	9:00 AM	5:00 PM	12:00 PM	1:00 PM
<input type="checkbox"/> Sat				
<input type="checkbox"/> Sun				

## How Many Hours Do You Work in a Day?

Some people work 10 hours a day, others much less. When we tell Taskline or Outlook that a task lasts for 1 day, or for 1 week, how many hours does that mean? So, for the final part of our initial setup, we must now tell Outlook how many working hours there are in a day and in a week:

In Outlook, click **File** then **Options** in the left hand bar, then **Tasks** in the left hand bar.

1. In **Task working hours per day**, enter 7. Note that this information excludes your lunch hour.
2. In **Task working hours per week**, enter 35.
3. Click **OK** on all the open Outlook dialogs.

## Entering Your Tasks

The first stage in work scheduling is to break your work down into small chunks, or tasks. Each task should represent a specific part of your work. It should be short in duration – ideally just a few hours and certainly no more than a few days.

In our tutorial example, the first step in your work week involves planning three projects that are due soon:

- Chapter 2 of a user manual, which you think will take you 2 days and is your first priority.
- Proof read a booklet, which will take you 3 hours and is your second priority.
- Research documentation tools, which will take you 1 day and is your third priority.

To create the first task, take the following steps:

1. In Outlook, open the **Tutorial Tasks** folder you created earlier by clicking the **Tutorial Tasks** entry in the **Folder List**. If you cannot see the **Tutorial Tasks** entry, then click the **+** or **▸** signs to the left of the **Tasks** folder on the **Folder List**. This will display sub-folders. Now click the **Tutorial Tasks** folder to open it.
2. Create a new task:
  - In Outlook, click the **New Task** button on the **Home** ribbon.
  - Or simply double click a blank area of the task list in Outlook.
3. Enter the following information:
  - On the **Task** tab, enter "User Manual chapter 2" in the **Subject** box.
  - On the **Taskline** tab, in the **Total work** box, enter "2d". This is shorthand for 2 days.
  - In the **Priority (A1)** box, enter "A10". With **Priority (A1)**, you must enter a letter. The number is optional.
4. Click **Save & Close**.

You are now ready to create the second and third task.

1. To create the second task, repeat the previous steps, 1-3, entering the following information:
  - On the **Task** tab, enter "Proof read Quick Start Guide" in the **Subject** box.
  - On the **Taskline** tab, in the **Total work** box, enter "3h". This is shorthand for 3 hours.
  - In the **Priority (A1)** box, enter "A20".
  - Click **Save & Close**.
2. To create the third task, repeat the previous steps, 1-3, entering "Research documentation tools" in the **Subject** box, "1d" in the **Total Work** box, and "A30" in the **Priority (A1)** box.

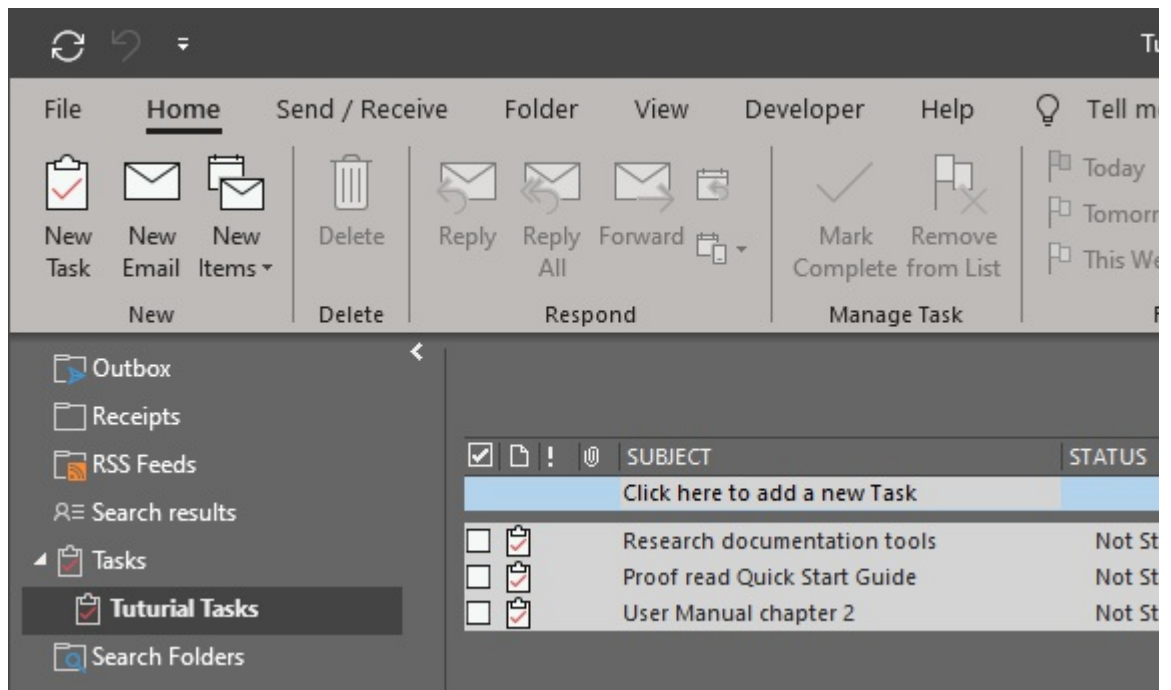
### Tips

- You can enter fractions in durations, for example "1.5 hours".
- Setting task priorities with a letter and numeric value ending in zero, such as A10, A20, and so forth, allows you to insert other tasks in the future that may have priorities in between the priorities of your original list of tasks. In Taskline, you can also reprioritize your tasks quickly and easily by selecting the **Options** tab and then clicking the **Renumber or Re-letter Priority (A1)** button.
- You are not restricted to using **Priority (A1)** to order your tasks. For example, you can tell Taskline to schedule your tasks in the order they are displayed in Outlook's task list instead, when all sorting and grouping is turned off. This is called **Natural Order**. Displaying and scheduling tasks in Outlook's Natural Order is convenient, because tasks can be reprioritized by dragging them up and down the task list. In fact, we recommend using **Natural Order** because of its convenience and simplicity. However, this tutorial uses **Priority (A1)**, which is also a flexible method of prioritizing

tasks.

- Notice that when you have entered a value for **Total work**, the **Schedule this task** check box is selected. New tasks are not schedule by Taskline by default, but as soon as you add some **Total work**, the **Schedule this task** check box will be automatically selected. If you wish to have Taskline schedule a milestone, which is a task with zero **Total work**, you will need to manually select the **Schedule this task** check box.
- Taskline also works with the tasks you already have, before you installed the software. When Taskline runs, it converts standard Outlook tasks to Taskline tasks.

To view your tasks, you can click the **Tutorial Tasks** folder in Outlook. With Outlook 2013, you should see something like this:




Now that you have planned your tasks, you can schedule them, as described in the next activity in this tutorial example.

## Scheduling Your Tasks

Taskline makes planning your work quick and easy. Taskline schedules your work around existing appointments and also to fit in with your **Working hours**. When you have scheduled your tasks with Taskline, you can also view them in the Outlook Calendar, like any other appointment.

In our example, let's assume that today is a Saturday and you are planning your activities for next week. You want to run Taskline to schedule all three of your tasks for next week.

1. In Outlook, click  **Settings** to display the Taskline Settings dialog.
2. For the purposes of this tutorial, clear the **Default to current date and time** check box, which is on the **Tasks** tab. For real work however, it is common to leave this selected.
3. In the **First task starts at** box, click the down arrow and select whatever date is the Monday just gone. Then, click on the **First task starts at** box and use the keyboard to change the time to **9 AM**. Or, if today is Monday, select today's date, but again change the time to **9 AM**. This date is the starting point for your

schedule. It is not usual to plan in the past, but selecting the previous Monday is convenient for our tutorial, because Outlook initially opens the calendar on the current week.

4. On the **Order by** list, select **Priority (A1)** and, if necessary, **Ascending**. This makes sure that Taskline schedules your tasks in the order of their **Priority (A1)** values.

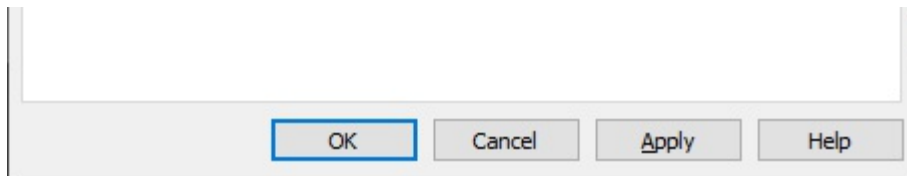
### Tips

- Task ordering, for example by using **Priority (A1)**, is a simple system that is used in place of the complex logic links used by Project Management software.
- You can change the priority later by editing the task.
- If you want to make task priority more visible, you may wish to manually prefix the **Priority (A1)** value to the start of the task subject, for example "A20 Proof read chapter 2", and then **Order by Subject**. This allows you to see and change **Priority (A1)** on the Subject line, although you will not be able to use the **Renumber or Re-letter Priority (A1)** if you use this method.
- **Order by Natural Order** is another popular method of ordering your Taskline tasks. Having your tasks displayed in natural order and scheduled in descending natural order is a very convenient way of working, because the order in which you see your tasks is the order in which Taskline schedules them. You can easily change this order by simply dragging tasks up and down the view in Outlook. [More](#).
- Natural Order only works with the tasks shown in your selected Outlook Tasks folder. It cannot be used with Outlook's **To-Do Bar/To-Do List**.

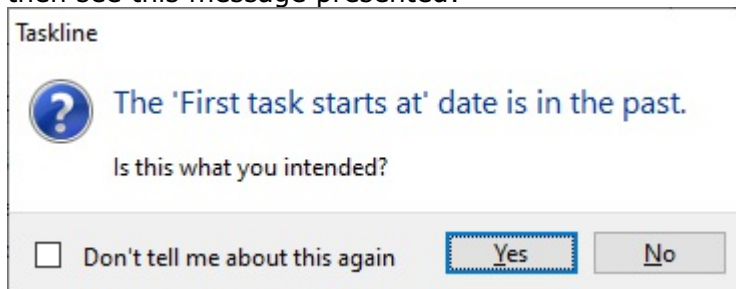
Your **Tasks** tab of the Taskline Settings dialog should now look like the screen shot below, although your **First task starts at** date will depend on whatever date you selected:

The screenshot shows the 'Taskline Settings' dialog box with the 'Tasks' tab selected. The 'First task starts at' section has a date and time dropdown set to 'Mon 8/16/2021 9:00 AM' and an unchecked checkbox for 'Default to current date and time'. The 'Schedule tasks in the following order' section shows a list of criteria: 'Order by' is 'Priority (A1)' with 'Ascending' sort order, and four 'And then by' entries are all set to '<None>'. The 'Schedule tasks in' section shows the folder path 'Folder "\Outlook\Tasks\Tutorial Tasks"' and an unchecked checkbox for 'Include subfolders'. A 'Select...' button is located to the right of the folder path.

Taskline Settings		
Tasks Projects Calendar Working Hours Options Help / About		
First task starts at		
Mon 8/16/2021 9:00 AM		▼
<input type="checkbox"/> Default to current date and time		
Schedule tasks in the following order		
Order by	Priority (A1) ▼	Ascending ▼
And then by	<None> ▼	▼
And then by	▼	▼
And then by	▼	▼
And then by	▼	▼
Schedule tasks in		
Folder "\Outlook\Tasks\Tutorial Tasks"		Select...
<input type="checkbox"/> Include subfolders		



5. On the **Calendar** tab, select the **Create for tasks that are Not Started or In Progress** check box, if necessary. This step tells Taskline to show your tasks in Outlook's calendar. It does this by creating "calendar task entries", which are appointments that represent your tasks.
6. Click **OK** to close the Taskline Settings dialog and schedule your tasks. You may then see this message presented:



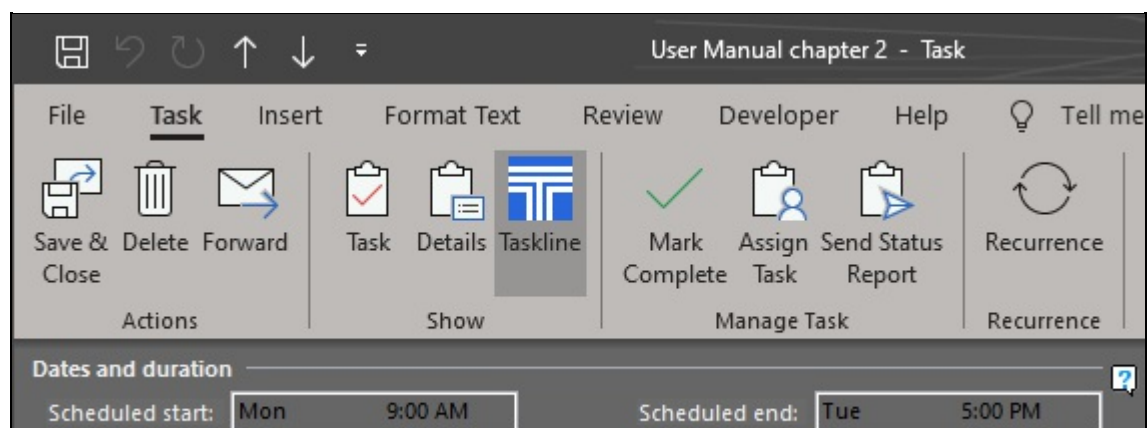
Taskline warns you because starting your schedule in the past is unusual. However, we have chosen a start date of last Monday just for the purposes of this tutorial, so select the **Don't tell me about this again** check box and click **Yes** to continue.

When Taskline has finished, the **Task Schedule Report** may appear. This contains useful information about your schedule that we won't explore in this tutorial, so simply click **OK** to close this.

Taskline will now have updated your task list and your calendar. To see the results of these steps, in Outlook, click the **Tutorial Tasks** folder and double-click a task. When you open your tasks in Outlook, you can see that dates have been set in the **Scheduled Start** and **Schedule End** boxes on the **Taskline** tab. These are the estimated, or most likely, start and end dates for your tasks. You will notice that the priority A10 task has been scheduled first, the priority A20 task second and the priority A30 task last.

As few people can predict future work with 100% accuracy, for example a meeting may take longer than anticipated, you cannot usually start and finish every task exactly on schedule. However, the **Scheduled Start** and **Scheduled End** dates give you a very good idea of when you are likely to start working on a task, and when you are likely to finish it.

You should have the same days and times as those shown below, but because your task dates depend on your chosen **First task starts at** date, dates have been removed from these screen shots:





Total work:  (14 hours)

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Proof read Quick Start Guide - Task

File Task Insert Format Text Review Developer Help Tell me

Save & Close Delete Forward Task Details Taskline Mark Complete Assign Task Send Status Report Recurrence

Actions Show Manage Task Recurrence

Dates and duration

Scheduled start: Wed 9:00 AM Scheduled end: Wed 12:00 PM

Total work:

Research documentation tools - Task

File Task Insert Format Text Review Developer Help Tell me

Save & Close Delete Forward Task Details Taskline Mark Complete Assign Task Send Status Report Recurrence

Actions Show Manage Task Recurrence

Dates and duration

Scheduled start: Wed 1:00 PM Scheduled end: Thu 12:00 PM

Total work:  (7 hours)

Now open your **Tutorial Cal** folder to see your tasks in Outlook's calendar. The calendar shows exactly the same date and time information as the task list, it's just that this view of the information is more visual. Notice how Taskline has scheduled your tasks to fit in with your **Working Hours**: for example, work starts at 9AM and no tasks are scheduled during your lunch break

### Note

- If your Outlook Calendar looks different to this screen shot, make sure that you have Outlook's **Work Week** calendar view selected:  
**View** ribbon → **Work Week**

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	5	6	7	8
9 AM	User Manual chapter 2 [3 h]	User Manual chapter 2 [3 h]	Proof read Quick Start Guide [3 h]	Research documentation tools [3 h]
10				
11				

12 PM				
1	User Manual chapter 2 [4 h]	User Manual chapter 2 [4 h]	Research documentation tools [4 h]	
2				
3				
4				

**Calendar task entries** (the appointments that represent tasks) usually get deleted and recreated each time Taskline is run, so it is best not to change them, but rather change the task instead.

### Tip

- You can **pin calendar task entries** so that they survive a Taskline reschedule. This enables you to use Taskline to automatically schedule your tasks, then tweak those results manually by pinning **calendar task entries** to certain dates and times. [More.](#)

You have finished the first three activities that describe how to start using Taskline:

- Setting your work week
- Entering tasks
- Scheduling tasks
- Viewing your schedule in Outlook's calendar

### Tip

- When you are working with your own tasks, bear in mind that it is often difficult to predict all your tasks in advance and as such you should make an allowance in your schedule for unpredictable or spontaneous work. Working on unscheduled tasks can result in unnecessary pressure, because it almost inevitably means that you get behind with your scheduled work. Never schedule yourself for every minute of every day. Instead, build some contingency, or slack time, into your schedule. Some methods for doing this are:
  - Enter less **Working hours** in Taskline than you actually do
  - Enter an extra break during the day, to represent contingency
  - Over estimate **Total work** on your tasks

You now know the basics for using Taskline. The remaining activities, extending the example used in the first activities, describe how you can get the most out of Taskline:

- Customizing your Tasks folder so that you can easily view and edit Taskline information, such as **Priority (A1)**
- Adding new appointments to your Outlook Calendar after you have planned your week. Taskline automatically adjusts your task schedule for new appointments

- Managing new work and deadlines
- Using more than one set of **Working hours**, so that different tasks can be scheduled for different time slots
- Adding colors to tasks in your Outlook calendar, so that you can quickly identify the **Status** or **Category** of different tasks
- Completing tasks

If you prefer not to undertake any further activities, please now jump to the last section of this tutorial, [Tidy Up](#).

## Getting a Better View of Your Tasks in Outlook

Taskline task fields such as **Scheduled Start**, **Scheduled End** and **A1**, as well as standard Outlook task fields such as **Total Work**, is information we want to frequently reference. So let's add columns to the Outlook task table view so that we can see this information without opening the task first. Taskline comes with 2 built-in views, one customized for people ordering task by Natural Order and the other customized for ordering by **Priority (A1)**. Our tutorial uses **Priority (A1)**, so let's switch to that view: **View** ribbon → **Change View** → **Taskline A1**

### Note

- Outlook views can be customized; you can add new columns, delete columns, change the order of columns as well as sort and group task information. [How?](#)

The **Tutorial Tasks** folder should now look like the picture below. Again, dates have been removed from the screen shot, which shows only days and times. This is to avoid confusion, as your dates depend on your choice for the **First task starts at** date.

<input checked="" type="checkbox"/>	SUBJECT	A1	TOTAL WORK	WORK REM	%	SCHEDULED START	SCH
Click here to add a new Task							
<input checked="" type="checkbox"/>	User Manual chapter 2	A10	2 days	14 h	0%	Mon	Tue
<input checked="" type="checkbox"/>	Proof read Quick Start Guide	A20	3 hours	3 h	0%	Wed	We
<input checked="" type="checkbox"/>	Research documentation tools	A30	1 day	7 h	0%	Wed	Thu

Now that you can easily view your tasks in the **Tutorial Tasks** folder, you can change task properties by clicking in a row.

### Important

- You should not edit the **Scheduled Start** and **Scheduled End** dates. These are the dates that Taskline calculates.

The next activity illustrates how Taskline automatically adjusts your task schedule to accommodate new appointments.

## Adding New Appointments

When you add a new appointment to your Outlook Calendar, Taskline automatically adjusts your tasks around the new appointment.

In our tutorial example, you remember that you have a training course on Wednesday morning. Take the following steps to add a new appointment to your Outlook Calendar:

1. In Outlook, open your **Tutorial Cal** Outlook folder.



2. Create a new Outlook appointment:
  - Double click a blank area of the calendar.
  - Or press **Control+Shift+A**.
3. On the **Appointment** tab, enter "Training course" in the **Subject** box.
4. Select **Out of Office** from the **Show as** setting, which is in the **Options** section of the ribbon. This makes sure that Taskline schedules your tasks around this appointment.


**Tip**

- When working with Taskline in the future, if you want Taskline to ignore an appointment, select **Free** in the **Show as** list.
5. Deselect the **All day event** check box, if it is selected, because this training course lasts only for the morning.
  6. In the first **Start time** box, enter the date corresponding to Wednesday of the current week. In the second **Start time** box, enter a time of "9:00 AM" and in the **End time** box, enter "12 PM".
  7. For the purposes of this tutorial, we'll turn off the appointment reminder. Choose **None** from the **Reminder** drop down list, which is shown underneath the **Show as** setting on the ribbon.
  8. Click the **Save & Close** button.


**Tip**

- You can also set travel times before and after appointments on your Calendar. [How?](#)

You now need to tell Taskline to *Reschedule* your work, to take account of the new appointment:

1. Click  [Settings](#) then, when the Taskline Settings dialog appears, simply click **OK** to run Taskline.
2. If the **Task Schedule Report** appears, click **OK** to dismiss it.

**Tip**

- You can run Taskline immediately, without showing the Taskline Settings dialog first, by clicking  **Reschedule** on the ribbon.

Now open your **Tutorial Cal** folder to see your updated schedule. If you have Outlook's **Work Week** view selected, it should look like the screen shot below:

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	12	13	14	15
9 AM	User Manual chapter 2 [3 h]	User Manual chapter 2 [3 h]	Training course	Research document tools [3 h]
10				
11				
12 PM				

1	User Manual chapter 2 [4 h]	User Manual chapter 2 [4 h]	Proof read Quick Start Guide [3 h]	Research document tools [3 h]
2				
3				
4			Research documentation tools [1 h]	
5				

## Note

- Notice how the standard Outlook appointment is shown in green (although this color depends on your Outlook settings) while Taskline's **calendar task entries** are displayed in orange. Taskline gives you a lot of control over the color of **calendar task entries** and we'll explore this a bit more later in this tutorial.

The next activity in our tutorial explains how to handle new tasks and accommodate deadlines.

## Managing New Tasks and Deadlines

Taskline automatically adjusts your schedule to allow for new tasks.

In our tutorial example, you get a call from your supervisor. Your colleague is ill and your supervisor wants you to take on the colleague's work. The company newsletter needs to be finished by Friday and is a work package consisting of several tasks. You jot the names of the new tasks and the estimated hours on a sticky note:

- Write article about new office, 4 hours
- Write article about how the sales office works, 4 hours
- Put the newsletter together, 3 hours

You can now enter the new tasks in Outlook.

1. Create a new task in your **Tutorial Tasks** folder in Outlook and enter the following information:
  - On the **Task** tab, enter "Article about new office" in the **Subject** box.
  - On the **Taskline** tab, enter "4h" in the **Total work** box.
  - You prefer to get your own work done first, so enter a low **Priority (A1)** value of **B10**.
  - Click **Save & Close**
2. Create a second task and enter the following information:
  - On the **Task** tab, enter "Article about sales office work" in the **Subject** box.
  - On the **Taskline** tab, enter "4h" in the **Total work** box.
  - It doesn't matter in which order you do this and the previous task, so you enter the same **Priority (A1)** value of **B10**.
  - Click **Save & Close**

3. Create a third task and enter the following information:

- On the **Task** tab, enter "Complete newsletter" in the **Subject** box.
- On the **Taskline** tab, enter "3h" in the **Total work** box.
- Finishing off the newsletter must happen after the previous 2 tasks have been completed, so you enter a **Priority (A1)** value of **B20** to ensure this.
- Click **Save & Close**

Your task list should now look like the screen shot below. As usual, the dates have been removed from the screen shots:

<input checked="" type="checkbox"/>	SUBJECT	A1	TOTAL WORK	WORK REM	%	SCHEDULED START	SCH
	Click here to add a new Task						
<input checked="" type="checkbox"/>	User Manual chapter 2	A10	2 days	14 h	0%	Mon	9:00 AM Tue
<input checked="" type="checkbox"/>	Proof read Quick Start Guide	A20	3 hours	3 h	0%	Wed	1:00 PM Wed
<input checked="" type="checkbox"/>	Research documentation tools	A30	1 day	7 h	0%	Wed	4:00 PM Thu
<input checked="" type="checkbox"/>	Article about sales office work	B10	4 hours	4 h	0%	None	Non
<input checked="" type="checkbox"/>	Article about new office	B10	4 hours	4 h	0%	None	Non
<input checked="" type="checkbox"/>	Complete newsletter	B20	3 hours	3 h	0%	None	Non

The newsletter needs to be finished by Friday, so we need to apply the Friday deadline to all 3 of the newsletter tasks.

1. In Outlook, double-click the **Complete newsletter** task to open it.
2. On the **Taskline** tab, set the **External constraint** to **Finish on or before**.
3. In the **Enter Date** box, just to the right of **Finish on or before**, click the down arrow and enter the date corresponding to Friday of this week. Leave the time blank, as you are happy for the tasks to be finished any time on Friday.
4. As it stands, this deadline applies only to this one task. To apply the deadline to the other tasks in the Newsletter work package too, click the **Select any tasks that should finish before this one** check box.
5. In the list, click "Article about new office" and "Article about sales office work". This makes sure that these two tasks are scheduled for completion before the final task: "Complete newsletter". The Taskline task form should now look like the following picture:

Complete newsletter - Task

File Task Insert Format Text Review Developer Help Tell me

Save & Close Delete Forward Task Details Taskline Mark Complete Assign Task Send Status Report Recurrence

Actions Show Manage Task Recurrence

**Dates and duration**

Scheduled start: None Scheduled end: None

Total work: 3 hours

**Progress**

Actual start: None None Status: Not Started

Actual work: 0 hours % Complete: 0%

Work remaining: 3 hours

**Reminder**

☐ Reminder  working time before scheduled start

**Scheduling control**

☒ Schedule this task Show as:  ☒ Task can be split

Project:  Minimum split:

Working hours:  Priority (A1): B20

Max time per day:  Max time per week:

**External constraint**

Finish on or before  Fri  None

☒ Select any tasks that should finish before this one ☐ Show projects

Article about new office

Article about sales office work


Proof read Quick Start Guide

Research documentation tools

User Manual chapter 2

Note: To define task order, use "Schedule tasks in the following order" on the Tasks tab of Taskline's main dialog.

6. Click the **Save & Close** button.

To see the results of the previous steps, click  **Reschedule** to run Taskline again. Taskline automatically adjusts the existing tasks to allow for the new work and the new deadline:

### Notes

- The tasks "Article about sales office work" and "Article about new office" were assigned equal **Priority (A1)** values. Thus Taskline can schedule these in any order and your results might have these two tasks swapped.
- Some tasks have been scheduled for the following week. However, screen shots in this tutorial will only show the first week's work.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	12	13	14	15
9 AM	User Manual chapter 2 [3 h]	User Manual chapter 2 [3 h]	Training course	Article about new o [3 h]
10				
11				
12 PM				

1	User Manual chapter 2 [4 h]	User Manual chapter 2 [4 h]	Proof read Quick Start Guide [3 h]	Article about sales work [4 h]
2				
3				
4			Article about new office [1 h]	
5				


### Tip

- Task constraints, such as deadlines, override task ordering, but only if this is necessary for the constraint to be met. In our example, "Research documentation tools" gets scheduled last, even though it has a higher priority than the newsletter tasks. This is so that the newsletter deadline can be met. In general, you don't need to worry about work deadlines when setting task order – Taskline will worry about this for you.

The next tutorial activity shows how to define and use more than one set of **Working Hours**.

### Scheduling Different Tasks to Different Time Slots

Let's assume that you work at home on Tuesdays. You decide to do your documentation work in the office, because you often need to talk to other people. You also decide that you would like to do your "Research documentation tools" task at home, where you get fewer interruptions. To handle this requirement in Taskline, we create a 2<sup>nd</sup> set of **Working Hours** for just Tuesdays:

1. Click  [Settings](#) to display the Taskline Settings dialog.
2. Click the **Working Hours** tab.
3. Click the **New** button, which is near the top of the tab.
4. On the **New Working Hours** dialog:
  - Enter "@Home" in the **Enter a unique name** box.
  - Select the **Start with empty settings** option.
  - Click **OK**.
5. You will now see the empty "@Home" **Working Hours** tab. On the row for Tuesday, enter "9" in the 1<sup>st</sup> box, "5" in the 2<sup>nd</sup> box, "12" in the 3<sup>rd</sup> and "1" in the 4<sup>th</sup>. You have now defined the "@Home" hours and any task assigned these hours will only get scheduled on a Tuesday. Your **Working Hours** tab should look like the screen shot below:

Taskline Settings ? X

Tasks Projects Calendar **Working Hours** Options Help / About

Working hours—

@Home ▼ New... Delete

Working day — Breaks during the day —

	Start work	Stop work	From	To	
<input type="checkbox"/> Mon					<input checked="" type="radio"/> 1st break
<input type="checkbox"/> Tue	9:00 AM	5:00 PM	12:00 PM	1:00 PM	<input type="radio"/> 2nd
<input type="checkbox"/> Wed					<input type="radio"/> 3rd
<input type="checkbox"/> Thu					<input type="radio"/> 4th
<input type="checkbox"/> Fri					<input type="radio"/> 5th
<input type="checkbox"/> Sat					<input type="radio"/> 6th
<input type="checkbox"/> Sun					<input type="radio"/> 7th
					<input type="radio"/> 8th
					<input type="radio"/> 9th

Select two or more weekday check boxes to simultaneously edit the times for several days. Leave the Start and Stop work boxes blank for days not worked.

Schedule tasks during these appointment types—

☒ Free ☐ Busy

☐ Tentative ☐ Out of office

☐ Working elsewhere

Options—

☐ Default hours ☒ Schedule tasks that have been assigned these hours

OK Cancel Apply Help

6. In the **Working hours** drop down list, select "Standard work week".
7. Deselect the **Tue** check box and then select and delete the text in the **Start work** box for Tuesday. This means that any task assigned the "Standard work week" hours will not get scheduled for a Tuesday. Your **Working Hours** tab should look like the screen shot below:

Taskline Settings ? X

Tasks Projects Calendar **Working Hours** Options Help / About

Working hours—

Default work week ▼ New... Delete

Working day — Breaks during the day —

	Start work	Stop work	From	To	
<input checked="" type="checkbox"/> Mon	9:00 AM	5:00 PM	12:00 PM	1:00 PM	<input checked="" type="radio"/> 1st break
<input type="checkbox"/> Tue		5:00 PM	12:00 PM	1:00 PM	<input type="radio"/> 2nd
<input checked="" type="checkbox"/> Wed	9:00 AM	5:00 PM	12:00 PM	1:00 PM	<input type="radio"/> 3rd
<input checked="" type="checkbox"/> Thu	9:00 AM	5:00 PM	12:00 PM	1:00 PM	<input type="radio"/> 4th
<input checked="" type="checkbox"/> Fri	9:00 AM	5:00 PM	12:00 PM	1:00 PM	<input type="radio"/> 5th
<input type="checkbox"/> Sat					<input type="radio"/> 6th
<input type="checkbox"/> Sun					<input type="radio"/> 7th
					<input type="radio"/> 8th
					<input type="radio"/> 9th

Select two or more weekday check boxes to simultaneously edit the times for several days. Leave the Start and Stop work boxes blank for days not worked.



several days. Leave the Start and Stop work boxes blank for days not worked.

Schedule tasks during these appointment types—

☒ Free ☐ Busy  
☐ Tentative ☐ Out of office  
☐ Working elsewhere

Options—

☒ Default hours ☒ Schedule tasks that have been assigned these hours

OK Cancel Apply Help

8. Click **Apply** to save your changes.

Having defined the "@Home" hours, we now need to tell the "Research documentation tools" task to use these hours:

1. Open the "Research documentation tools" task by double clicking it.
2. On the **Taskline** tab, in the **Scheduling control** section, select "@Home" in the **Working hours** drop down list.
3. Click **Save & Close**

Finally, reschedule your tasks by clicking **OK** on the Taskline Settings dialog. Your results should look like the screen shot below. "Research documentation tools" has moved to Tuesday and other tasks have been shunted around to accommodate this:

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	12	13	14	15
9 <sup>AM</sup>	User Manual chapter 2 [3 h]	Research documentation tools [3 h]	Training course	User Manual chapter 2 [3 h]
10				
11				
12 <sup>PM</sup>				
1	User Manual chapter 2 [4 h]	Research documentation tools [4 h]	User Manual chapter 2 [4 h]	Article about new office [4 h]
2				
3				
4				
5				

## Tips

- In this example, we explicitly assigned the "@Home" **Working Hours** to the task. However, in many cases Taskline will automatically locate and use the correct hours for you. If a task's **Working Hours** are blank, then Taskline will look at that task's **Categories** and **Project**. If there exists some **Working Hours** with exactly the same name as an assigned **Category** or **Project**, then Taskline will automatically use those hours. For example, if we had a **Category** called "@Home", and we had assigned that **Category** to our "Research documentation tools" task, then Taskline would have automatically used the "@Home" hours; there would be no need to explicitly assign them.
- If a task has **Working Hours** left empty, and there is no **Working Hours** match on **Category** or **Project**, then Taskline will use whichever hours have **Default hours** selected on the **Working Hours** tab. After installation, these hours are set to "Standard work week".
- Being able to define more than one set of **Working Hours** is a powerful feature and there are many uses for it. See [Using Different Working hours for Different Tasks](#) for more ideas and suggestions.


The next activity in our tutorial shows how to customize the color of calendar task entries, for example to distinguish task entries from regular appointments.

### The Color of Task Entries on Your Calendar

---

Taskline allows you to give different calendar task entries different colors. Example uses of this feature are to distinguish calendar task entries from regular appointments, or to highlight task entries of a certain **Project** or with a certain **Status** value.

In our tutorial example, you decide that you'd like to distinguish calendar task entries from your appointments by using a specific color. You want to see all tasks that haven't been started in orange and all work that has been completed in gray (completing tasks will be looked at in the next section of the tutorial).

1. Click  **Settings** in Outlook.
2. Click the **Calendar** tab and then the **Define Colors** button to display the **Calendar Task Entry Colors** dialog.
3. You should see 2 pre-defined entries for defining the color of **calendar task entries**: orange for **Not Started** tasks and gray for **Completed** tasks. You decide to change the color of **Not Started** tasks from orange to blue:
  - Click on the **Not Started** row to select it
  - In the colors drop-down list, just to the left of the **Update** button, choose blue
  - Click **Update**
4. You also decide that you'd like to visually show when you're working at home. To do this, we need to add another rule to the list:
  - In the bottom-left drop-down list, select "[Hours] @Home"
  - In the list of colors just to the right, choose purple
  - Click the **Insert New** button. Your dialog should now look like this:



Calendar Task Entry Colors

Define which colors to use for calendar task entries

Category Etc	Color
[Hours] @Home	
<Not Started>	
<Completed>	

Move Up

Move Down

Delete

Insert New

Update


OK

Cancel

- Click **OK** to save your changes and close the **Calendar Task Entry Colors** dialog
- Click **Apply** to save your changes and update the Calendar colors; there is no need to run Taskline again in this case. Now click **Cancel** to close Taskline's Settings dialog.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	12	13	14	15
9 AM	User Manual chapter 2 [3 h]	Research documentation tools [3 h]	Training course	User Manual chapter 2 [3 h]
10				
11				
12 PM				
1	User Manual chapter 2 [4 h]	Research documentation tools [4 h]	User Manual chapter 2 [4 h]	Article about new office [4 h]
2				
3				
4				
5				

## Tips

- You can also visually distinguish calendar task entries based on **Category**, **Project**, **Working Hours**, **Priority** (High/Medium/Low), **Priority (A1)** (letter only), **Overdue**, **Pinned** and Outlook Folder.
- To prevent the creation of **calendar task entries** for one or more **Category Etc** values, you can select  from the color drop down list.

### Note

- **Calendar task entry** colors are only shown if **calendar task entries** do not have any Outlook **Categories** assigned. Because, in this latter case, Outlook prefers to use the **Category** color.


The final activity in our tutorial example describes how you can mark tasks as completed.

## Accounting for Completed Work

---

Taskline allows you to track and view the work that you complete both on your Outlook calendar and your Outlook task list. Marking a task as Complete also tells Taskline to stop scheduling that task for a future date.

You'd like to keep a record in your calendar of what you did, and when. We need to change a setting on Taskline to enable this:

1. In Outlook, click  **Settings** to display the Taskline Settings dialog
2. Click the **Calendar** tab
3. Select the **Keep a record of completed work** check box, if necessary
4. Click **Apply** to save this change and then **Cancel** to close the Taskline Settings dialog


In our tutorial example, it is now Monday evening and you want to update your schedule for the rest of the week. During Monday you did 7 hours work on the "User manual chapter 2" task, as planned. However, you now think that this task involves 16 hours work and not the 14 hours you originally estimated. You update the task to reflect your progress and latest estimate as follows:

1. In Outlook, open the **Tutorial Cal** folder, if necessary.
2. Right click the first "User manual chapter 2" entry and select **Open Task** from the pop-up menu
3. On the **Taskline** tab:
  - Change **Total Work** from "2d" to "16h"
  - In the **Actual Work** box, enter "1d" to account for the time you have spent on this task so far. Press the Tab key on your keyboard to update the form. You will see that **Work Remaining** gets updated to show 9 hours remaining and that **Status** gets updated to show **In Progress**
  - Click **Save & Close**

Your **Tutorial Cal** folder will immediately update to show the task progress you have just entered. This is shown in gray, because of the **Calendar Task Entry Colors** setting we entered in the previous tutorial activity:

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	12	13	14	15
9 AM	[X] User Manual chapter 2 [1 d]	Research documentation tools [3 h]	Training course	User Manual chapter 2 [3 h]
10				
11				
12 PM				
1	[X] User Manual chapter 2 [1 d]	Research documentation tools [4 h]	User Manual chapter 2 [4 h]	Article about new office [4 h]
2				
3				
4				
5				

We now need to reschedule our remaining work to take account of the extended "User manual chapter 2" task:

1. Click  [Settings](#) to open the Taskline Setting dialog.
2. On the **Tasks** tab of the Settings dialog, move the **First task starts at** date forward one day from Monday to Tuesday. You can do this either by typing in your change, or by clicking the down arrow and selecting a new date.

#### Note

- When you change the date, Taskline might change the time, so retype the time if necessary so that it remains at "9 AM".
3. Click **OK** to have Taskline reschedule your work. You should see the following results. Some tasks are scheduled for the following week, including the extra 2 hours for task "User manual chapter 2", but as usual our screen shots only show the first week:

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	12	13	14	15
9 AM	[X] User Manual chapter 2 [1 d]	Research documentation tools [3 h]	Training course	Article about sales office work [3 h]
10				


10				
11				
12 PM				
1	[X] User Manual chapter 2 [1 d]	Research documentation tools [4 h]	Article about new office [4 h]	Article about sales office work [1 h]
2				Complete newsletter [3 h]
3				
4				
5				

### Tip

- You can also open a calendar task entry and mark it as **Complete**. Sometimes this is more convenient than recording progress on the task.

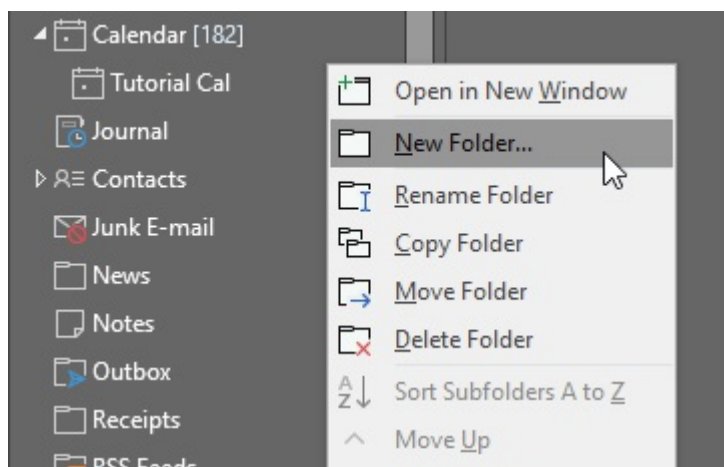
### Adding Structure to Your Task List

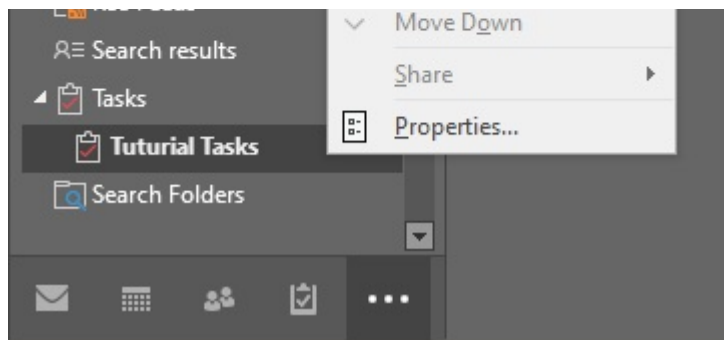
You decide to rearrange your tasks into a hierarchy. You want to keep your own documentation work in one folder and the newsletter work of your sick colleague in a different folder. First, we need to tell Taskline that we're now using subfolders:

1. Click  **Settings**
2. On the **Tasks** tab, select the **Include subfolders** check box
3. Click **Apply** to save this change and then click **Cancel** to close the Taskline Settings dialog

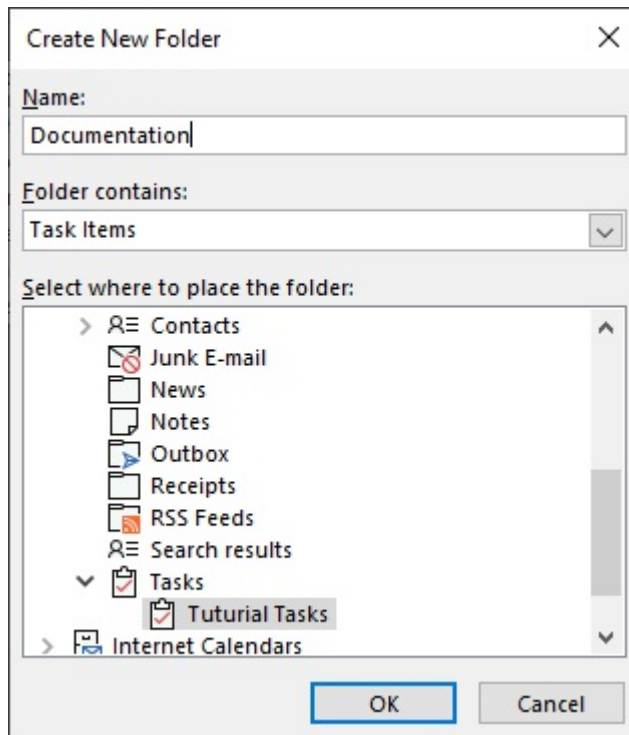
Now we need to create the Outlook folders and move the tasks into them. We'll create 2 new Outlook folders, one called "Documentation" and one called "Newsletter":

1. Right click the "Tutorial Tasks" folder in Outlook's Folder Pane and select **New Folder** on the pop-up menu

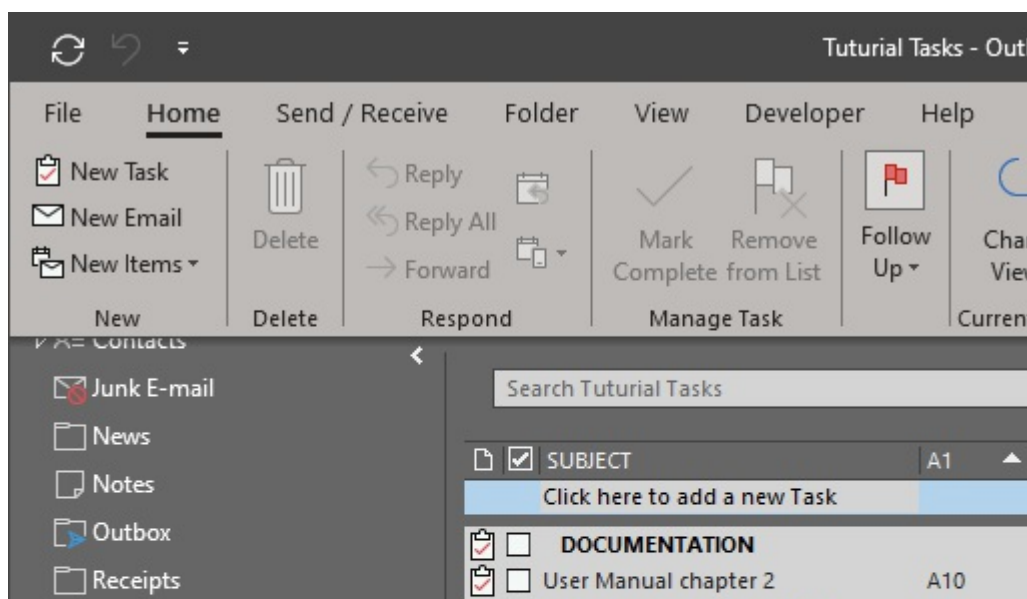


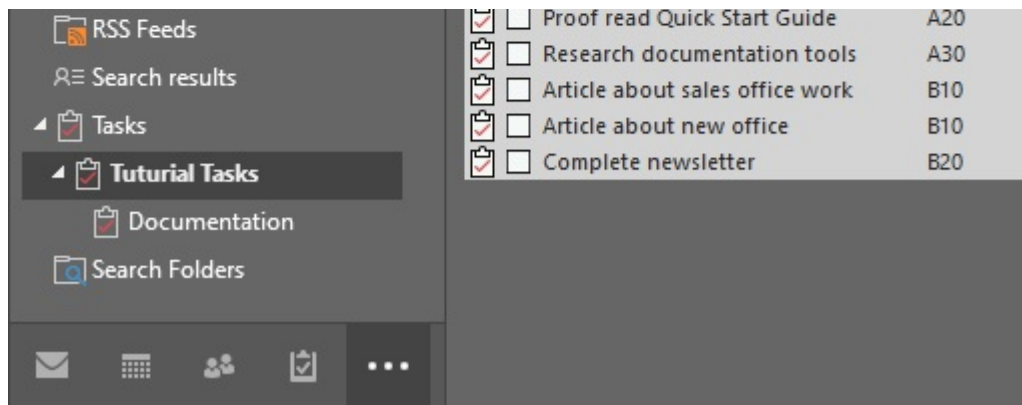


2. Type "Documentation" into the **Name** box and click **OK**

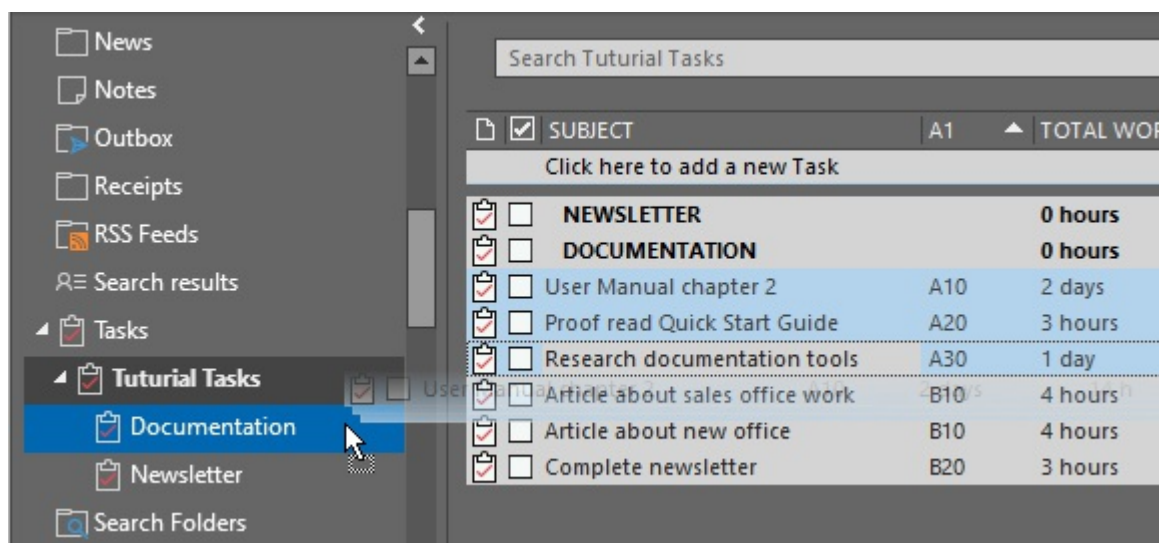


3. Outlook creates a "Documentation" subfolder beneath the "Tutorial Tasks" folder. You will also notice that Taskline has created a "DOCUMENTATION" task. This is called a **Folder Task** and is a placeholder and summary for all the tasks it contains.

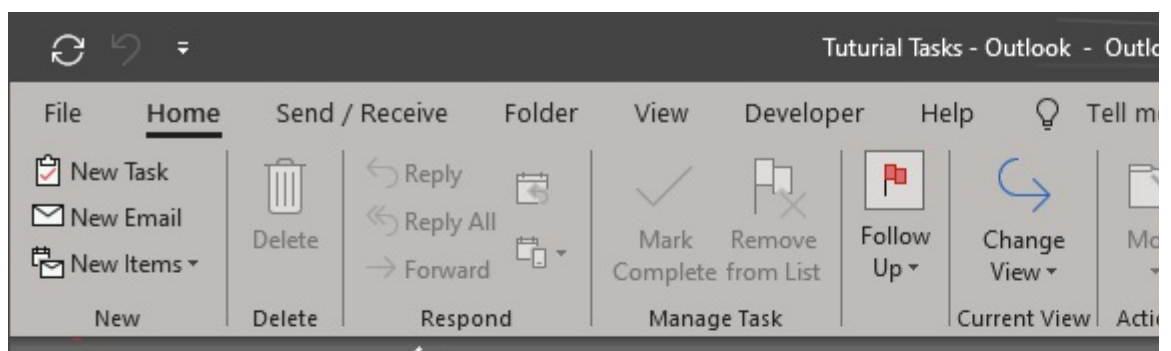




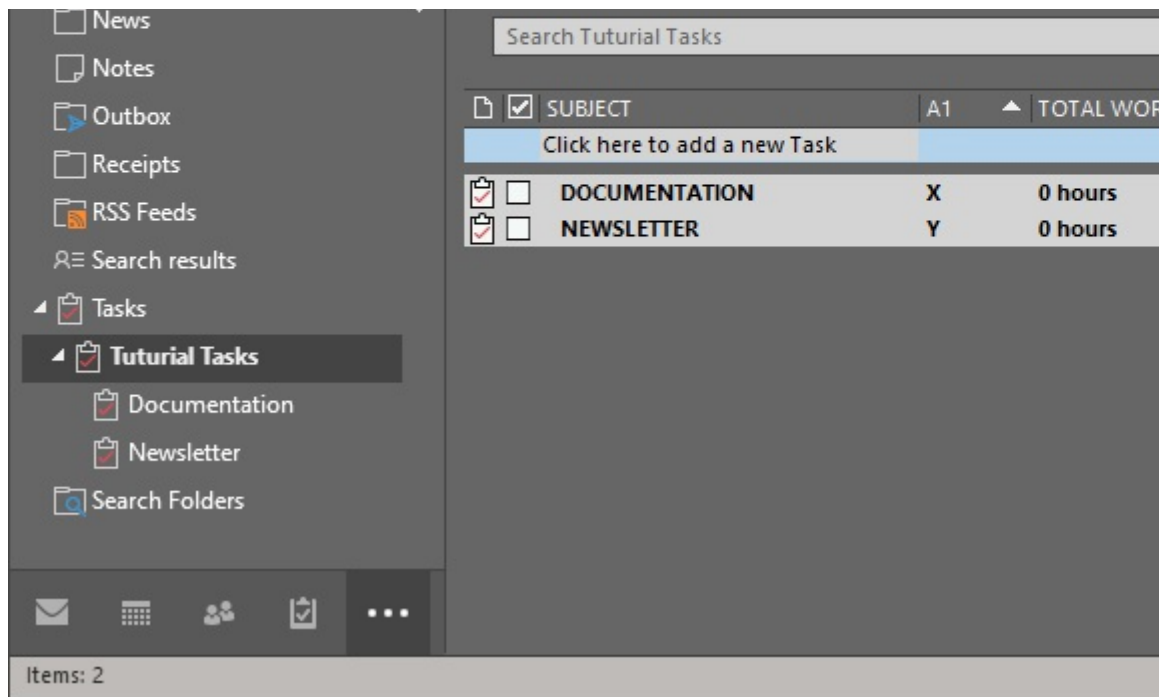
4. Repeat the steps 1 and 2 to create another new tasks folder called "Newsletter"
5. We now need to move the tasks into their respective folders. Select the 3 documentation tasks by clicking on one of them and control-clicking on the other two. Then drag the selected tasks into the Documentation folder:




6. Select the 3 newsletter tasks and drag them to the Newsletter folder
7. You should now just see just the two **Folder Tasks** in your Tutorial Tasks folder. **Folder Tasks** act as placeholders for all the tasks in their respective subfolders. Task ordering, as defined in the **Schedule tasks in the following order** settings on the Taskline Settings dialog, works only within each folder. When Taskline finds a **Folder Task**, all the tasks in that branch are inserted at that point. Consequently, we need to tell Taskline in what order to schedule our new **Folder Tasks**. We'll stick with our previous desire to do our Documentation work first, then the Newsletter work. So, give the DOCUMENTATION task an **A1** value of "X" and the NEWSLETTER **Folder Task** an **A1** value of "Y" (you could choose any letters, it's just the order that's important):







Now let's reschedule our tasks:

- Click  **Settings**
- On the **Options** tab, select the **Create root summary task** check box
- Click **OK** to reschedule your tasks

In fact, the results of the reschedule will be exactly the same as previously, as we've not changed any tasks, only restructured them. You will see that Taskline has written summary information to each **Folder Task**. For example, the **Scheduled Start** will be the earliest **Scheduled Start** of all subtasks and the **Total Work** will be the sum of all the **Total Work** values of all subtasks.

<input checked="" type="checkbox"/>	SUBJECT	A1	▲	TOTAL WORK	WORK REM	%	SCHEDULED START
Click here to add a new Task							
<input checked="" type="checkbox"/>	<i>Taskline Summary</i>	A00		37 hours	1.25 d	19% Tue	9:00 AM
<input checked="" type="checkbox"/>	DOCUMENTATION	X		26 hours	19 h	27% Tue	9:00 AM
<input checked="" type="checkbox"/>	NEWSLETTER	Y		11 hours	11 h	0% Wed	1:00 PM

Additionally, you will see that Taskline has created a "Taskline Summary" task. This is because we selected the **Create root summary task** option. This acts as a summary task for every task rescheduled.

### Note

- In this example, we created the tasks first, then moved them into the correct folders. You can also work the other way round – create the Outlook folders first and create the tasks in their correct folders.

## Summary of What We've Learned in This Tutorial

Now that you have completed basic tasks in this tutorial, you are ready to start using Taskline to manage your own work. You now know how to complete the following activities:

- Enter your work week
- Plan tasks
- Schedule tasks
- Show tasks in your Outlook Calendar
- Have different types of tasks display in different colors on your Outlook Calendar
- Define and use multiple **Working Hours**
- Adjust your work schedule when you complete tasks
- Structure your tasks into a simple hierarchy

The [Planning Your Work](#) topic is now recommended further reading. It is just one page and offers useful guidelines on how to plan your work effectively.

Some other topics you might now like to explore, which were not covered in this tutorial, are:

- [Recording Task Progress via Outlook's Calendar](#)
- [Using Projects](#)
- [Preparation and Travel Time on Appointments](#)
- [Changing how Taskline Splits Tasks during Scheduling](#)
- [Pinning to Manually Override some or all of Taskline's Scheduling](#)
- [Giving Calendar Task Entries Colors](#)
- [Defining the Subject of Calendar Task Entries](#)

## Tidy Up

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1. On the **Tasks** tab on Taskline's Settings dialog, reset the **Schedule the tasks in** folder back to the folder that contains your main task list
2. On the same tab, you may also wish to select the **Default to current date and time** check box. This tells Taskline to automatically use the current date and time as the starting point for your schedule. Selecting this check box saves you having to continually select a new date
3. On the **Calendar** tab of Taskline's Settings dialog, reset the **My appointments are in** and **Write task entries to** folders back to your main calendar
4. You may now wish to delete the "Tutorial Tasks" and "Tutorial Cal" folders, and the Tutorial Tasks subfolders, you created at the start of this tutorial, by dragging them to the **Deleted Items** folder
5. On Taskline's [Advanced Options dialog](#), select the **Reset "Don't tell me about this again" messages** check box and click **OK**, then **Apply**. This is so that any messages that were permanently dismissed, for the purposes of the tutorial, are now shown again



# Introduction to Outlook Tasks and Taskline

## Planning Your Work

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If you have a large amount of work to do, you generally need to plan the execution of that work, so that you know:

1. What you should be working on at any given moment.
2. When you can expect to get current and future work finished.
3. Whether you can meet all of your deadlines.
4. What effect taking on new work will have on existing tasks.
5. Whether you're behind or ahead of schedule. If you're behind schedule, you'll want to know as soon as possible, because the later you leave corrective action the more difficult it is to remedy the situation.

Planning your work is called Work Scheduling or Task Scheduling, and is an example of good Time Management.

The first stage in work scheduling is to break your work down into small chunks, or tasks. Each task should represent a specific part of your work. It should be short in duration — ideally just a few hours and certainly no more than a few days. For example, if you had to design a new expenses form, you might split that item of work down into 1) Consulting current users of the form to get their improvement suggestions, 2) Collating feedback, 3) Creating the new form design, and 4) Getting approval for the new design.

Splitting up your work into short tasks has two advantages:

- It increases the accuracy of your work schedule, since the shorter a task is, the more accurate your time estimate will generally be.
- It makes it easier to know whether you're on schedule, since you'll know which tasks should have been completed by now. For example, if you're part way through an 18 day task, it's difficult to know whether you're on schedule, because you only have subjective means of measuring your progress. But if you had split the task up into six three-day tasks, and you've completed the first two tasks, you'll know in this latter case that you're exactly one third of the way through your work.

You cannot predict all tasks in advance and consequently you should make an allowance in your schedule for unpredictable or spontaneous tasks and events, such as phone calls. Working on unscheduled tasks can result in unnecessary pressure, because it almost inevitably means that you get behind with your scheduled work. Building in some contingency (or slack time) into your schedule is a simple way to address this very common problem. You could do this by adding a day time break to represent the contingency, for example. Over-estimating the **Total Work** for some of your tasks is another good method.

Another issue to consider is whether it is correct to omit from your schedule tasks that might be too short to schedule individually. For example, you can't schedule in every phone call. However, although an individual phone call may take up only a very small amount of time, collectively this might not be the case. If you find, for example, that you spend 30 minutes per day on the phone, you should schedule yourself 30 minutes each day as a consequence. You could do this using a recurring appointment, or by entering a 30 minute day time break (phone calls are not a break, but this is a quick and convenient way to reserve daily time in your schedule).


You should also consider scheduling yourself some personal or "thinking" time during the day, perhaps by entering the time you start work slightly later than is actually the case.

Finally, a common and avoidable mistake is to not update future work estimates to reflect past experience. For example, consider a 4 day task that you find yourself only half way through after 3 days. You're clearly behind schedule, but we tend to think optimistically, to think that somehow we will catch-up. But, if the first half of the task took you 3 days, then it's nearly always reasonable to assume that the second half will also take 3 days. So update **Total Work** to 6 days to reflect this. If other people are waiting for this task, then the sooner you tell them it's going to be late, the better. This gives them more time to re-plan. Nobody likes being let down at the last minute.

Once you have a set of tasks with time estimates, Taskline can create a time schedule for you, so that you get to see both accurate detail, and the big picture.

**Next:** [Setting Your Working hours](#)

## Starting Taskline

Click  [Settings](#) in Outlook to start Taskline and display the Taskline Settings dialog.

## Setting Your Working Hours

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You need to tell Taskline what hours you work so that it can schedule your tasks correctly.

### Tips

When setting up your working week, consider the following important points:

- You cannot predict all tasks in advance and hence you should make an allowance in your schedule for unpredictable or spontaneous events, such as phone calls. Build some contingency (or slack time) into your schedule. You could do this by adding a day time break to represent the contingency, for example. Over-estimating the **Total work** for your tasks is another good method.
- Consider planning some personal or thinking time at the start of the day, perhaps to plan the day's work. You could do this by entering a start work time slightly later than the time you actually arrive at work. Similarly, you can schedule thinking time at the end of the day, perhaps to plan the next day's work.

With Taskline Standard Edition, you can only define a single set of **Working Hours**. Taskline Professional Edition however allows you to define many different sets of **Working Hours**. For example, you might wish to plan your work tasks during the day and your personal tasks at evenings and weekends, in which case you would define one set of hours for work tasks and another set for personal tasks. You give each set of hours a different name, such as "Office Hours," and these names are displayed in the drop down list at the top of the **Working Hours** tab.

To enter your working hours, click the **Working Hours** tab on the Taskline Settings dialog, then do one of the following:

### [To Choose the Working Hours You Wish to View or Edit](#)

Select the hours from the drop down list at the top of the **Working Hours** tab.

### [To Set the Hours You Work](#)

- For each day you intend to work on your tasks, enter the time you intend to start working in the **Start work** box and the time you intend to finish in the **Stop work** box
- If these boxes are left blank, Taskline assumes that no work is done on that day

### Tip

- A time of 23:59 will leave the last minute of the day unworked. To work this last minute, use 0:00 for midnight.

### [To Set Day Time Breaks, Such as Lunch Breaks](#)

- Enter break start and end times in the **From** and **To** boxes for each day you work
- If these boxes are left blank, Taskline assumes you work with no breaks on that day
- You can define up to 9 breaks per day. Use the radio buttons to the right of the **From** and **To** boxes to select which break you wish to view or edit

### To Edit Several Days in One Operation

- You can edit the times for multiple days in a single operation. To do this, select the appropriate day check boxes on the left side of the **Working Hours** tab
- Selecting or deselecting the check box at the head of the column will select or deselect all the days of the week
- Any changes you make in any time box on a day with a selected check box will have that same change applied to all the selected days

### To Create an Additional Set of Working Hours

- Click the **New** button to display the **New Working Hours** dialog
- Enter a unique name for the hours and choose whether to create an empty set of hours or to copy an existing set
- Click **OK** to create the new hours

### To Delete a Set of Working Hours

- Select the hours you wish to delete from the drop down list box and then click the **Delete** button
- You cannot delete **Working Hours** that are currently assigned to one or more tasks – you must assign different **Working Hours** first
- There must always be at least one set of **Working Hours** defined, so if you delete the last remaining set, Taskline will automatically insert a new set of hours called "Standard work week"

### To Set the Default Hours

The **Default Hours** are used for tasks that have no working hours assigned. Exactly one of the defined working hours must be the default. To specify which one, select the **Default hours** radio button.

### To Schedule or Ignore Tasks Assigned the Current Hours

You can have Taskline ignore all tasks assigned certain **Working Hours** by deselecting the **Schedule tasks that have been assigned these hours** check box. Conversely, selecting the check box will mean that the tasks are scheduled.

### To Set Which Appointments Taskline Accounts For or Ignores

By default, Taskline schedules tasks around appointments, unless they have **Show time as** set to **Free**. But you can change this and set certain **Working Hours** to either take into account, or ignore, any type of appointment, based on the **Show time as** setting.

Example use: you sometimes work from home, or work from another office and you prefer to do certain types of tasks in this other location. These occasions are shown on your Outlook Calendar by **Working elsewhere** appointments. You could address this requirement by creating a set of **Working Hours** that schedule tasks during **Working elsewhere** appointments and assigning these **Working Hours** to the tasks you prefer to do in the other location.

### To Set the Number of Working Hours in a Day and in a Week

If you assign 2 days **Total Work** to a task, how many hours does this represent? Taskline

needs to know the number of working hours in a day and in a week. Outlook and Taskline use this information to convert days and weeks to hours, and vice versa. These settings are contained within Outlook. To view or change them:

- Click **File** → **Options** → **Tasks** tab. Set **Task working hours per day** and **Task working hours per week** as appropriate

Most of the time the values for these working hours settings are simple to calculate. For example, if you work from 9am to 12pm on Saturday and Sunday, you work 3 hours per day and 6 hours per week. However, if you don't work the same hours on each day, see [If You Work Different Hours on Different Days](#).

#### To Change the Calendar Shading in Outlook

The calendar in Outlook has its own working week specified. This is simply used to set the calendar shading. On the **Working Week** view in Outlook's calendar, hours that are outside the calendar's working week are shaded differently. To change the calendar's working week, and hence change the calendar shading:

- Click **File** → **Options** → **Calendar** tab. Then set **Start time** and **End time** as appropriate



#### To Assign Working Hours to a Task

On the **Taskline** tab of the task form in Outlook, select the hours from the **Working hours** drop down list.

#### Tip

- Sometimes you may want tasks of a certain **Project** or **Category** to automatically have certain **Working Hours** assigned. For example, you may want tasks of **Category** "Personal" to be scheduled for weekends. If you give the **Working Hours** exactly the same name as a **Project** or **Category**, Taskline will automatically assign the **Working Hours** to the task for you. [More](#).

#### Next: Creating a New Task

#### Related Topics

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[Using Different Working hours for Different Tasks](#)

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[If You Work Different Hours on Different Days](#)

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[Working Hours Tab](#)

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## Creating a New Task

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1. In Outlook, click the **Tasks** folder
2. Double click any blank space in the task view or click the **New Task** button on the ribbon
3. The **Taskline** form appears, displaying options for Outlook and Taskline. [More](#)
4. On the **Task** tab, enter any settings that you may want
5. On the [Taskline](#) tab, enter an estimated figure in the **Total work** box. Taskline requires this information to work with your tasks. [More](#)
6. Click **Save and Close** on the form to save your changes and add the task to your Outlook task list

### Tips

- You can also set up reminders on the task form. If set, Outlook displays an automatic reminder when or before a task is due to start
- Outlook does not restrict you to one task folder. In fact, you can have as many folders as you want and arrange these in a hierarchy that mirrors the structure of your work. You can then have Taskline schedule this task hierarchy [How?](#)
- If you have a simple list of tasks created using a text editor, word processor or similar, you can have Taskline convert this list into Outlook tasks [How?](#)

**Next:** [Creating Tasks from Other Outlook Items](#)

### Related Topics

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[The Taskline Form in Outlook](#)

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## Creating Tasks from Other Outlook Items

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### Creating a Task from an Appointment

To make it easier to plan your work in Outlook's calendar, as well as in the task list, Taskline includes an option to create a task from an appointment. Right click any standard Outlook appointment and click either **Create Task** or **Create Task and Pin**. Both options create a Taskline task from the appointment; attributes such as **Subject**, body text, **Categories** etc are also copied.

If the appointment is in Taskline's **Write task entries to** folder, it is also converted into a Taskline **calendar task entry**, i.e. it becomes exactly like other **calendar task entries** Taskline creates for each task when it runs. Be careful – like all **Calendar Task Entries**, the converted appointment will be deleted and recreated the next time Taskline runs, so any changes or attachments will be lost. If you don't want this to happen, select the **Create Task and Pin** option instead. Or, if you want to create a task from an appointment and leave the appointment unchanged, use the standard Outlook feature of dragging the appointment onto your **Tasks** folder.

#### Note

- **Create Task** is only available for appointments that are not recurring

### Creating a Task from an Email, Note or Contact Item

You can also quickly create tasks from Outlook emails, notes and contact items. Right click any of these items and click **Create Task**. A Taskline task will be created with many attributes, such as **Categories**, being automatically copied from the item to the new task.

If a task is created from an email, and that email has been flagged for Follow Up, the Follow Up date will be used to automatically set a **Finish on or before** constraint on the task.

#### Note

- Unlike the **Create Task** menu option on appointments, **Create Task** for emails, notes and contacts leaves the original Outlook item unchanged.

**Next:** [Setting Total work](#)

#### Related Topics

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[Creating New Appointments](#)

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[The Taskline Form in Outlook](#)

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## Setting Total Work

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**Total Work** is your estimate of how long a task will take – effectively how much work it entails. It is the task's duration.

1. Open an existing task in Outlook, for example by double clicking it, or create a new task by double clicking a blank area of Outlook's task list.
2. On the **Taskline** tab, enter how long you think the task will take in the **Total Work** box, which is set to 0 by default. You can enter the **Total Work** as a number of minutes, hours, days or weeks; the abbreviations are m, h, d and w. For example, to set **Total Work** to 5 hours, you can type "5h" or "5 hours". When you have updated **Total Work**, click **Save and Close**.

### Tips

- If you wish to set the **Total Work** values of several tasks in one step, you can add a **Total Work** column to the tasks table view. [How?](#)
- Outlook converts large numbers of small time units to larger time units. For example, "120 minutes" converts to 2 hours, and 8 hours converts to 1 day, assuming that there are 8 working hours in the day. See [Working Hours Per Day and Week](#) for information on how to set the number of working hours in a day.
- Tasks with a **Total Work** of zero are called milestones, or goals. Milestone tasks represent significant events, rather than routine work items. [More](#)

**Next:** [Milestones](#)

### Related Topics

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[Progress: Working Through Your Task List](#)

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[Milestones](#)

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## Milestones

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Milestones, or goals, are normal Taskline tasks with a **Total Work** of zero. Milestone tasks represent significant events, rather than routine work items. An example might be finishing an important package of work, e.g "Phase 1 Completed."

Milestones mostly work in the same way as other tasks, with a few exceptions:

- When you create a task with 0 in the **Total Work** box, the **Schedule this task** check box on the **Taskline tab** of the Taskline form is deselected by default. You will need to select this check box to have Taskline schedule the milestone
- Taskline will not show milestones in the calendar unless the **Create all day events for milestones** option is selected on the calendar tab of Taskline's Settings dialog
- Milestones cannot be progressed using **Actual Work**, as they have no work to progress. You can set only milestones as **Not Started** or **Completed** – you cannot have a partially completed milestone.
- You can color milestones on the calendar differently, to highlight them [How?](#)

**Next:** [Defining the Order in Which Tasks are Scheduled](#)

### Related Topics

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[Giving Calendar Task Entries Colors](#)

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## Defining the Order in Which Tasks are Scheduled

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In most cases you will want your tasks to be carried out in a certain sequence. This may be just personal preference, or it may be a necessity, for example you can't bind the handouts into a booklet until you've photocopied them.

Use the **Schedule tasks in the following order** drop down list boxes, on the **Tasks** tab of the Taskline Settings dialog, to control scheduling order. This simple system is used in place of complex logic links used by Project Management software. For tasks with constraints, such as a **Finish on** constraint, an additional method of using the **Taskline** task form to select all the tasks that are affected by the constraint can also be used. [More about constraints.](#)

Tasks can be ordered using more than one field. In this case, if tasks have the same values for the first field, then they are ordered according to the second field, and if they have the same values for the second field, they are then ordered by the values of their third field, and so on.

Taskline overrides the task order, if necessary, under the following conditions:

- Task **Constraints**, such as a **Finish On** constraint, override task order, but only if this is necessary to make sure that the constraint is met. This allows you to forget about deadlines etc when setting the task order – Taskline keeps track of these for you
- A task with a missed constraint, or a recurring task that has missed its recurrence date, is regarded by Taskline as overdue. Overdue tasks take priority over all others
- Different tasks assigned different **Working Hours** can get scheduled out of order, because some time slots might only be available to certain tasks
- If you have turned off **Task can be split** or if you have set **Minimum split** on a task, then it's possible that a higher priority task isn't able to use the first available free time slot, because it's too small. Thus the task will get scheduled in a later, longer, time slot, leaving the earlier one free for another (perhaps lower priority) task

### Note

- For tasks that have an external constraint and are part of a **Select any other tasks also affected by this constraint** selection, then the order of those tasks is rigidly adhered to. However, for reasons outlined above, you could still get gaps between such tasks and these gaps could get filled by other tasks, to give a more optimum schedule.

The task fields you can use to set the order in which tasks are scheduled are:

- **Natural Order.** Tasks in an Outlook folder have a natural order. This is the order in which they are displayed when all sorting and grouping is switched off, and is the order you created the tasks in. By default, Taskline schedules your tasks in Outlook's **Natural Order**. In Outlook, you will need to turn off sorting and grouping, and preferably filtering too, if necessary, should you want to view your tasks in their natural order:
  - Click **View** ribbon → **View Settings** button to display the **Advanced View Settings** dialog. Then use the **Sort** and **Group By** buttons on this dialog to set the **Sort Items by** and **Group items by** fields to **none**.

Having your tasks displayed in natural order and scheduled in descending natural order is often a very convenient way of working, because the order in which you see your tasks is the order in which Taskline schedules them. You can easily change this order by simply dragging the tasks up and down the view in Outlook.


### Note

- Natural Order only works with the tasks shown in your selected Outlook Tasks folder. It cannot be used with Outlook's **To-Do Bar/To-Do List**.

- **Priority (A1)**. You can enter a letter from A-Z and an optional number from 0 to 99 to define **Priority (A1)** for tasks.

You should consider leaving gaps between priorities, so that you can easily introduce a new task at a later date between two existing tasks. For example, you might give the first task that you want to do a task priority of B10, the second task a task priority of B20, and so on.

### Tips

- **Priority (A1) Ascending** order means that A01 gets scheduled first and Z99 last
- Taskline automatically sets the **ABC** task field to contain just the letter of **Priority (A1)**. This allows you to group Outlook views by this letter
- You can also bulk change the priority of tasks. Click  **Settings** → **Options** tab → **Renumber or Re-letter Task Priorities** button. You may wish to give groups of related tasks the same priority letter, so that the priority of the whole group can be changed in one go by using the **Renumber or Re-letter Priority (A1)** facility [More](#).
- **Priority**. This is the **Low/Normal/High** setting that Outlook uses. It is useful in that Outlook gives you symbols in the task table view showing the priority (↓ for low and ! for high), but is limited in that only three settings are available. The **Priority (A1)** option on the **Taskline** tab of the **Taskline** form gives you much more flexibility in scheduling tasks by priority and reordering them easily
- **Start Date**. The **Start** date is supported by standard Outlook tasks. Ordering by **Start** date can be useful if you have an existing task list to which you've already added **Start** dates. Tasks without **Start** dates are scheduled in no particular order, so you will probably need a secondary ordering method if you use **Order by Start date**.

If you want Taskline to try and ensure that some tasks start on or after a certain date, then place **Start on or after** constraints on those tasks. [More about task constraints](#)

- **Due Date**. The **Due** date is supported by standard Outlook tasks. Ordering by **Due** date can be useful if you have an existing task list to which you've already added **Due** dates. Tasks without **Due** dates are scheduled in no particular order, so you will probably need a secondary ordering method if you use **Order by Due date**.

If you want Taskline to try and ensure that some tasks finish on before a certain date, then place **Finish on or before** constraints on those tasks. [More about task constraints](#)

- **Total Work**. This is how long a task is expected to take. If, for example, you wanted to work on your shorter tasks first, then you would sort on **Total Work** [More](#)
- **Status**. Status can be **Not Started**, **In Progress**, **Completed**, **Waiting On Someone Else**, or **Deferred**. Ordering on **Status** can be useful, because it is a

way of pushing **Waiting On Someone Else** and **Deferred** tasks to the end of your list

- **Subject.** Ordering your tasks by subject is useful if you prefix your tasks with a code or a priority
- **Project.** Ordering by **Project** is a two step process:
  - On the **Tasks** tab of the Taskline Settings dialog, select **Project** in the **Order by** list, then select **Ascending**
  - On the **Projects** tab of the Settings dialog, put the **Project List** into scheduling order, by selecting projects and using the **Move Up** and **Move Down** buttons

### Tip

- You will usually also need a second level of ordering when **Order by Project** is used. This is because you will need to set the order of the tasks within each project, as well as the order of the projects themselves
- **Task Priority.** This field defines the priority for tasks created with Taskline Version 2.0 and earlier. Use with Versions 2.1 and newer is not recommended. Unlike the **Priority (A1)** field, this field supports only numbers, not numbers and letters
- **Custom fields.** You can order your tasks by most custom Outlook tasks fields, also known as **User Defined Fields**. See below for more information
- **Formulae.** You can also create a simple formula and use that formula to define task sort order. See below for more information

### Ordering Tasks Using Outlook Custom Fields

To do this:

1. Click **Custom fields...**, which is the 2nd to last entry in each **Order by/And then by** list. The **Custom Field Chooser** dialog will be shown
2. Select the custom fields you wish to appear in the **Order by** drop down lists, then click **OK**
3. The custom fields you selected will now appear in the **Order by** drop down lists. Now simply select them, as appropriate, just like any other fields

### Note

- Not all custom field types are shown in the **Custom Field Chooser** dialog. For example, it doesn't really make sense to order by Keywords. You can order by Text, Number, Currency, Yes/No, Date/Time, Duration and Integer fields

### Tip

- If you **Order by** one or more custom fields, and some tasks do not have values assigned to those fields, then those tasks will always go to the end of the task order, regardless of whether you choose **Ascending** or **Descending**

### Ordering Tasks Using Formula Fields

You can create a simple formula and use that formula to define task sort order. The formula allows you to reference any 2 task fields – including **Custom fields** – and add, subtract, multiple or divide them. For example, you might have a "Profit" custom task field. You could create a formula that divides "Profit" by **Total Work** to schedule the most profitable tasks first. To use formulae:

1. Click **Formulae...**, which is the last entry in each **Order by/And then by** list. The

**Formulae** dialog will be shown, which you can use to create new formulae or delete existing ones

2. Any formulae you create will now appear in the **Order by** drop down lists. Simply select them, as appropriate, just like any other fields

#### **Note**

- Formula can only reference Outlook numeric fields. Specifically Number, Percent, Currency or Integer Outlook fields

**Next:** [Setting When the First Task Should Start](#)

#### **Related Topics**

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[Setting When the First Task Should Start](#)

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[Using Projects](#)

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## Setting When the First Task Should Start

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You must tell Taskline where to start placing your tasks.

1. Open the Taskline Settings dialog by clicking the  [Settings](#) button in Outlook
2. On the **Tasks** tab, do one of the following:
  - Type in a date and a time, for example "May 5 2014 9am", in the **First task starts at** box. Note that the date and the time must be separated by a space
  - Enter only a date in the **First task starts at** box. If the time is omitted, Taskline adds the current time
  - Click the **Default to current date and time** check box. Taskline then enters the current date and time for you. If this is outside normal working hours, it is rounded up to the start of the next working period. For example, if you work 8am to 5pm Monday to Friday, and you click this check box at 9am on Tuesday, Taskline enters 9am Tuesday for you. If you click this check box on Saturday, Taskline enters 8am next Monday for you.

By default, the current time is also rounded up to the next 15 minute interval. For example, if the current time is 9:06am, Taskline will set 9:15am. You can control the amount of rounding by setting the **Round 'Default to current date and time' to next** option, which is on the [Advanced Options](#) dialog

- Click the arrow to the right of the **Date and Time** box. You can then choose a date from the calendar control. If necessary, you can click the year to choose a different year, and you can click the arrows to the left and right of the month to choose a different month. Once the calendar displays the correct month, select a date by clicking it. When you select a date, Taskline adds the time the working day starts to the end of the date

**Next:** [Scheduled start and Scheduled end](#)

### Related Topics

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[Defining the Order in Which Tasks are Scheduled](#)

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[Task Constraints](#)

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## Scheduled Start and Scheduled End

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When Taskline has finished scheduling your tasks, each one is assigned a start date and time and an end date and time. This information is stored in the **Scheduled Start** and **Schedule End** fields. [More](#).

**Scheduled Start** is the calculated, or most likely, start date for the task. For a new task, it is initially unset, but is recalculated each time you run Taskline. The Taskline calculation takes into account things like appointments in your calendar, the priorities of your tasks, and any constraints on them. As few people can predict work with 100% accuracy, for example a meeting might take longer than anticipated, you cannot usually start every task exactly on schedule. However, the **Scheduled Start** date gives you a very good indication of when you are likely to start working on a task.

**Scheduled End** is the estimated finish date for the task. It is initially clear and is recalculated each time you run Taskline. The calculation takes the **Scheduled Start** date and adds to it the task's **Total Work**. Taskline then adjusts for your normal working week, such as your daily breaks and appointments in your calendar, to derive this calculated end date for your task. You usually do not finish your tasks exactly as scheduled, because of unanticipated interruptions or because the task simply took more or less time than the **Total Work** estimate. However, the **Scheduled End** date gives you a very good idea of when you are likely to finish a task.

For a task that is part completed, **Scheduled Start** shows when the remaining part of the task should be started, and **Scheduled End** shows when the task is due to be fully completed. For a completed task, **Scheduled Start** shows when the task started.

By default, tasks that are not scheduled have their **Scheduled Start**, **Scheduled End** and **Week Commencing** dates cleared by Taskline. This makes it easy to see which tasks have been scheduled, and which have not. You can change this behavior by using the **Clear Scheduled Start and Scheduled End if task not scheduled** setting, which is on the [Advanced Options](#) dialog. A task might not be scheduled because for example the **Schedule this task** check box is not selected or perhaps because the project a task belongs to is not scheduled.

### Tips

- You can add **Scheduled Start** or **Scheduled End** columns to Outlook's task table view. [How?](#)
- You might want to sort the **Task** folder table view into **Scheduled Start** order, so that the tasks are listed in the order in which you want to work. [How?](#) However, both displaying and scheduling the task list in **Natural Order** is often the most convenient way to work.
- In the task table view, Outlook regards uncompleted tasks with a **Due** date in the past as being overdue, and these are shown in red by default.
- You can tell Taskline to set the task **Start** and **Due** dates to keep them in step with the **Scheduled Start** and **Scheduled End** dates. To do this, select the **Taskline should set the Start and Due dates to the Scheduled dates** check box, which is on the **Options** tab of Taskline's Settings dialog. [More](#). Note that Outlook's **Start** and **Due** dates can only show dates and not times. In contrast, **Scheduled Start** and **Scheduled End** show both dates and times.

**Next:** [Using Projects](#)

### Related Topics

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[Defining the Order in Which Tasks are Scheduled](#)



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Task Constraints

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Predefined Outlook Views

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## Using Projects

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On the **Taskline** tab of the task form in Outlook, you can assign a project name to each task. You do this by clicking on the **Project** drop down list, to select an existing project name, or by typing in a new project name.

There are several advantages to assigning projects to tasks:

1. It improves task organization. Giving a task a project name is useful for grouping together related tasks. One way of doing this would be to group your Outlook task view by **Project**. [How?](#)
2. With projects, you now have a second way of categorizing tasks, in addition to the standard Outlook method of **Categories**. A **Project** describes a related set of tasks, for example all the work for one particular customer, or a description of a significant collection of work, such as an office relocation. **Categories** on the other hand refer to the type of work, such as administration, report writing, meetings etc. As a guide, **Categories** tend to be fixed, while **Projects** tend to change over time.
3. It allows you to schedule your tasks in **Project** order. To do this:
  - i. Put the **Project List** into priority order, by selecting projects and using the **Move Up** and **Move Down** buttons.
  - ii. On the **Tasks** tab, select **Project** in the **Order by** list, then select **Ascending**.

### Tip

- You will usually also need a second level of ordering when **Order by Project** is used. This is because you will need to set the order of the tasks within each project, as well as the order of the projects themselves.
4. If you have the **Display Task Schedule Report when Taskline has finished** check box selected, which is on the **Options** tab of Taskline's Settings dialog, you can see a report of work for each **Project** when Taskline has finished task scheduling.

On the **Projects** tab of the Taskline Settings dialog, you can also:

- Have Taskline ignore all the tasks of one or more projects. On the **Projects List**, if the check box next to the project name is selected, Taskline will schedule that project. If it is deselected, Taskline will ignore it.
- Add new project names. Simply type the name in and click the **Insert New** button.
- Import new projects from the Windows clipboard. [More](#)
- Delete old project names. Taskline keeps track of all the project names you have used previously, so that you can select them from a list rather than type their names in. To permanently delete old project names that you don't intend to use again, select them and click the **Delete** button.

### Tips

- Although called **Project**, you can use this field for any text you want, such as customer name for example
- You can also use Outlook Folders to structure your task list. Folders allow you to set up a multi-level task hierarchy [More](#). If your tasks are in a hierarchy, you can still assign them **Projects**

### Note

- By default, Taskline stores the project name assigned to a task in an Outlook User Defined Field called **Project**. However, if the **ClearContext project compatibility** advanced option is selected, Taskline instead uses an Outlook custom field called **CC-TopicName**. This is the name used by the ClearContext® Outlook Add-In and so aids compatibility if you also have that Add-In installed.

## Related Topics

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[Project and The Taskline Task Form in Outlook](#)

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[Taskline Settings, Projects Tab](#)

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[Task Hierarchy](#)

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# Introduction to Outlook Appointments and Calendars

## About Appointments

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You may well have many events happening that temporarily stop you working on your tasks – meetings, holidays, conferences, training courses, dental appointments and so on. Some of these may be one-offs, such as a training course, others may happen regularly, such as a weekly management meeting.

You should enter such events into Outlook's calendar, which is like an electronic diary. Outlook calls calendar entries **appointments**. When scheduling your tasks, Taskline checks your diary to see what appointments you have, and schedules your tasks around them. It can also be convenient for you to see all of your appointments etc listed in the calendar.

By default, Taskline will ignore appointments whose time has been set to be shown as **Free** and will take into account appointments that have been set to show the time they occupy as **Busy**, **Out of Office**, **Tentative** or **Working Elsewhere**. However, each set of **Working Hours** allows you to change whether Taskline processes or ignores appointments based their **Show time as** values. [How?](#)

Marking appointments as **Free** is useful if you wish to mark events in your calendar that do not stop you working for any appreciable time, such as an important football match you might want to check the result of.

To change how an appointment's time is shown, open the Appointment form, by double clicking the appointment, or right clicking and selecting **Open** from the pop up menu. Choose your option from the **Show time as** drop down list. Alternatively, right-click the appointment and select **Show time as** from the pop up menu.

For more efficiency in planning your time, Taskline allows you to add time allowances before and after the appointments in your calendar. This helps when you need to allow for travel or planning time before or after an appointment. Taskline does not schedule tasks during these times. [More](#)

### Related Topics

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[Travel and Preparation Time on Appointments](#)

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[Calendar Views](#)

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[Creating New Appointments](#)

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[Recurring Appointments](#)

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[Showing Your Tasks in the Outlook Calendar](#)

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## Calendar Views

There are several different calendar views available. The **Day**, **Week** and **Work Week** views are drawn to a time scale, which makes them particularly useful with Taskline. The **Work Week** view shows all the days that you work, one day per column. The following example shows a three-day working week:

	MONDAY	TUESDAY	WEDNESDAY
	12	13	14
09	[X] User Manual chapter 2 [1 d]	Research documentation tools [3 h]	Training course
10			
11			
12			
13	[X] User Manual chapter 2 [1 d]	Research documentation tools [4 h]	Article about new office [4 h]
14			
15			
16			
17			

The **Month** view shows a square grid, with one day per square. All the appointments on a day will be listed in each square:

MONDAY	TUESDAY	WEDNESDAY
12 Aug	13	14
09:00 [X] User Manual chapter 2 [1 d]	09:00 Research documentation tools [3 h]	09:00 Training course
13:00 [X] User Manual chapter 2 [1 d]	13:00 Research documentation tools [4 h]	13:00 Article about new office [4 h]

You can switch between calendar views by clicking on the appropriate buttons on the Calendar toolbar/ribbon.

You can also view appointments in a table format:

	SUBJECT	START	END
Recurrence: (none): 14 item(s)			
•	[X] User Manual chapter 2 [1 d]	Mon 8/12/2019 9:00 AM	Mon 8/12/2019 12:00 PM
•	[X] User Manual chapter 2 [1 d]	Mon 8/12/2019 1:00 PM	Mon 8/12/2019 5:00 PM
•	Research documentation tools [3 h]	Tue 8/13/2019 9:00 AM	Tue 8/13/2019 12:00 PM
•	Research documentation tools [4 h]	Tue 8/13/2019 1:00 PM	Tue 8/13/2019 5:00 PM
•	Training course	Wed 8/14/2019 9:00 AM	Wed 8/14/2019 12:00 PM
•	Article about new office [4 h]	Wed 8/14/2019 1:00 PM	Wed 8/14/2019 5:00 PM
•	Article about sales office work [3 h]	Thu 8/15/2019 9:00 AM	Thu 8/15/2019 12:00 PM
•	Article about sales office work [1 h]	Thu 8/15/2019 1:00 PM	Thu 8/15/2019 2:00 PM
•	Complete newsletter [3 h]	Thu 8/15/2019 2:00 PM	Thu 8/15/2019 5:00 PM
•	User Manual chapter 2 [3 h]	Fri 8/16/2019 9:00 AM	Fri 8/16/2019 12:00 PM
•	User Manual chapter 2 [4 h]	Fri 8/16/2019 1:00 PM	Fri 8/16/2019 5:00 PM
•	User Manual chapter 2 [2 h]	Mon 8/19/2019 9:00 AM	Mon 8/19/2019 11:00 AM
•	Proof read Quick Start Guide [1 h]	Mon 8/19/2019 11:00 AM	Mon 8/19/2019 12:00 PM
•	Proof read Quick Start Guide [2 h]	Mon 8/19/2019 1:00 PM	Mon 8/19/2019 3:00 PM

Consult Outlook's online help for details on creating Calendar Table views.

## Related Topics

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[About Appointments](#)

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[Creating New Appointments](#)

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[Recurring Appointments](#)

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[Showing Your Tasks in the Outlook Calendar](#)

## Creating New Appointments

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There are several ways to enter a new appointment into Outlook's calendar:

- Enter the details of your appointment on the Appointment form. To get an appointment form for a new appointment:
  - Click the **New Appointment** button on the **Home** ribbon
  - Double click a blank area of the calendar
  - Type **Control+Shift+A**
- On a **Day**, **Week** or **Work Week** view, you can also click or drag to select a time period, and simply type in the subject of your appointment.

On the **Day**, **Week** or **Work Week** calendar views, you can edit the start and end time of your appointment by dragging its top or bottom up or down. For other views, you will need to double click the appointment (or right click and select **Open**) to get presented with the appointment form, then edit the times on the form.

If your appointment lasts all day, select the **All day event** check box on the appointment form. Outlook calls appointments that last all day **All day events**. **All day events** are only shown as small entries at the top of the **Day**, **Week** and **Work Week** views, but they still encompass the whole day. On the **Month** view, you can distinguish **All day events** by them not displaying start or end times. By default, Outlook marks the time taken by an all day event as **Free**. Also by default, Taskline will not schedule tasks around calendar entries that have been marked as **Free**, therefore on the appointment form you may wish to change this setting to something else.

You should consult Outlook's documentation and online help for full information on how to work with Outlook's calendar. Only the aspects of the calendar most relevant to Taskline users have been discussed here.

### Tip

- You can also create a Taskline task from a standard Outlook appointment. [How?](#)

### Related Topics

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[About Appointments](#)

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[Calendar Views](#)

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[Recurring Appointments](#)

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[Showing Your Tasks in the Outlook Calendar](#)

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## Recurring Appointments

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Recurring appointments represent appointments and events that occur more than once, according to some regular pattern. For example, every Friday from 9am to 10am. As well as being useful for normal appointments, you can use recurring appointments to model an irregular working week or to periodically schedule yourself some personal or "thinking" time during the day.

There are many ways to create recurring appointments. Only one quick way is documented here:

1. Go to the **Day** or **Work Week** view for the day you want your recurring appointment to begin
2. Highlight (by dragging with the mouse) the time slot or slots that encompass your appointment
3. Right-click the highlighted area, and select **New Recurring Appointment**
4. Enter the recurrence pattern and the appointment details into the 2 forms that present themselves. You will need to consult the Outlook documentation for help with the **Appointment Recurrence** dialog options

You can make an existing appointment recurring by opening it (to present the appointment form), and then clicking on the **Recurrence** toolbar button.

To delete one of the recurring appointments, but not the whole series, select the appointment and press the **Delete** key, or click the **Delete** toolbar button. In the **Confirm Delete** dialog, choose **Delete this one**. This is useful if, for example, your regular Friday management meeting is canceled this week, but is still scheduled for future weeks.

This is only a brief summary of recurring appointments. See the Outlook documentation for full details.

### Related Topics

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[About Appointments](#)

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[Calendar Views](#)

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[Creating New Appointments](#)

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[Showing Your Tasks in the Outlook Calendar](#)


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## Showing Your Tasks in the Outlook Calendar

### Creating Calendar Task Entries

Taskline can integrate your task list with your Outlook calendar, in a time-scaled format. Everything you have to do, and when you should do it, is shown in one place, rather than having some of your work in the task list, and some in the calendar. You can also print out this calendar in daily, weekly or monthly formats.

To have Taskline display task entries for tasks (or parts of tasks) that are still outstanding on Outlook's calendar, click the **Calendar** tab on the Taskline Settings dialog and check the **Create for tasks that are Not Started or In Progress** check box. For example, if you have the following the task list:

 <input checked="" type="checkbox"/>	SUBJECT	TOTAL WORK	SCHEDULED START	SCHEDULED END
Click here to add a new Task				
<input checked="" type="checkbox"/>	User Manual chapter 2	2 days	Mon 8/16/2021 9:00 AM	Tue 8/17/2021 5:00 PM
<input checked="" type="checkbox"/>	Proof read Quick Start Guide	3 hours	Wed 8/18/2021 9:00 AM	Wed 8/18/2021 12:00 PM
<input checked="" type="checkbox"/>	Research documentation tools	1 day	Wed 8/18/2021 1:00 PM	Thu 8/19/2021 12:00 PM
<input checked="" type="checkbox"/>	Article about new office	4 hours	Thu 8/19/2021 1:00 PM	Thu 8/19/2021 5:00 PM
<input checked="" type="checkbox"/>	Article about sales office work	4 hours	Fri 8/20/2021 9:00 AM	Fri 8/20/2021 2:00 PM
<input checked="" type="checkbox"/>	Complete newsletter	3 hours	Fri 8/20/2021 2:00 PM	Fri 8/20/2021 5:00 PM

Then, when the **Show as** option on the Taskline Settings dialog **Calendar** tab is set to **Appointments, with accurate start and end times**, these tasks result in the following task entries in Outlook's calendar:

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	16	17	18	19
9 AM	User Manual chapter 2 [3 h]	User Manual chapter 2 [3 h]	Proof read Quick Start Guide [3 h]	Research documentation tools [3 h]
10				
11				
12 PM				
1	User Manual chapter 2 [4 h]	User Manual chapter 2 [4 h]	Research documentation tools [4 h]	Article about new office [4 h]
2				
3				
4				
5				

The calendar shows the same information as the task list, but presented more visually. Notice how a single task can result in several task entries. This is because few tasks are worked on non-stop. You may do some of a task in the morning, stop for lunch, do some more in the afternoon, stop at the end of the day and then finish it off the following day. Task entries show all this information, whereas tasks only summarize it by only showing dates for the **Scheduled Start** and the **Scheduled End**.


When the **Show as** option is set to **All day events from task scheduled start to scheduled end**, the tasks are shown as below. This is the same schedule, just presented differently:

	MONDAY	TUESDAY	WEDNESDAY
	16	17	18
	User Manual chapter 2 [2 d]		Research
			Proof read Quick Start Guide
9 AM			

Other guidelines for task entries are as follows:

- You can color task entries differently from regular appointments, or use colors to visually highlight certain task information [How?](#)
- You can use the **Show time as** list on the **Calendar** tab of the Settings dialog to have **calendar task entries** created as **Busy**, **Free**, **Tentative**, **Out of Office** or **Working Elsewhere**. You can use this feature to help distinguish **calendar task entries** from regular appointments
- Further to the previous point, you can override **Show time as** on a per-task basis, by setting **Show as** on the **Taskline** tab of the task form in Outlook. This could be used to differentiate certain tasks in the calendar
- If you want milestone tasks, which have 0 **Total Work**, to be displayed in the Calendar too, select the **Create all day events for milestones** check box on the **Calendar** tab of the Taskline Settings dialog.

### Tip

- When you create a task with 0 **Total Work**, this is ignored by Taskline by default. To have Taskline schedule the milestone, select the **Schedule this task** check box on the **Taskline** tab of the Taskline form in Outlook. [More about goals and milestones](#)
- **High Priority** tasks result in **calendar task entries** of **High Importance**, while **Low Priority** tasks give **Low Importance** ones
- You can also maintain task entries for completed and partly completed tasks, to keep a record of what you have achieved in your calendar [How?](#)
- If you make a change to one or more of your tasks, you will need to run Taskline again, for example by clicking the  **Reschedule** button, to synchronize the calendar
- Usually, uncompleted **calendar task entries** are deleted and recreated each time Taskline runs. So, if you change a **calendar task entry** in Outlook, for example to change the **Category**, this change will usually be lost when Taskline is next run. If you need to make an edit, change the task instead and then re-run Taskline. However, you can **Pin** selected **calendar task entries** so that they survive a

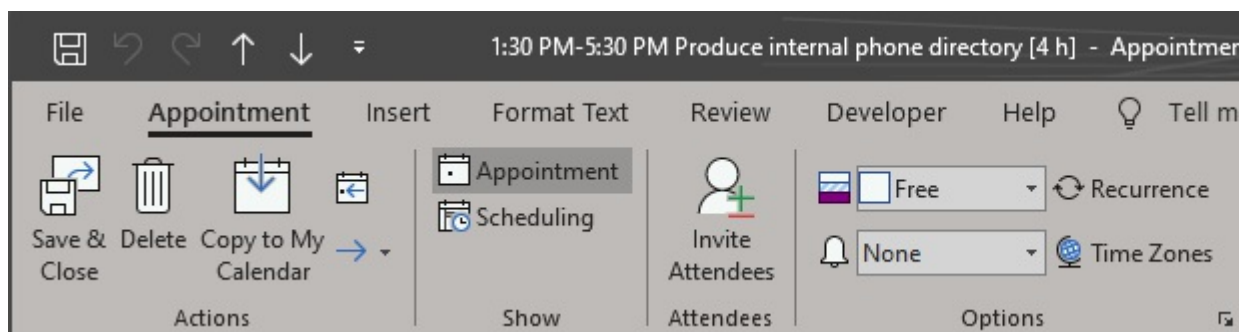
Taskline reschedule – see below

- You can **Pin** individual **calendar task entries** so that they survive a Taskline reschedule. This is so that you can use Taskline to automatically schedule your tasks and then tweak those results manually. Pinned entries do not get deleted and recreated during a Taskline reschedule. Instead, they stay put. Moving a **calendar task entry** will automatically pin it. [More](#)
- If you have the **Keep a record of completed work** option selected, completed **Calendar Task Entries** are left untouched by Taskline. However, if this option is not selected, Taskline will delete completed task entries when it runs
- You may not wish to have your calendar filled up with tasks for many days or weeks ahead. Sometimes, it helps to just focus on short term goals. You can achieve this by setting the **Limit tasks in calendar to first ... days** option, which is on the **Calendar** tab of the Taskline Settings dialog
- By default, **calendar task entries** do not have a **Category**. However, you can instruct Taskline to copy any **Categories** assigned to a task to its **calendar task entries**. Or, Taskline can assign the same **Category** or **Categories** to all **calendar task entries**. These settings are in the **Advanced Options** dialog. [More](#)
- Tasks with their **Status** set to **Waiting on someone else** are not scheduled by Taskline and will not normally be displayed in Outlook's calendar. However, you can have Taskline create **calendar task entries** for **Waiting on someone else** tasks, so that you get appropriate reminders for such tasks that are visible in Outlook's calendar. [How?](#)

## Accessing a Task via its Calendar Task Entry

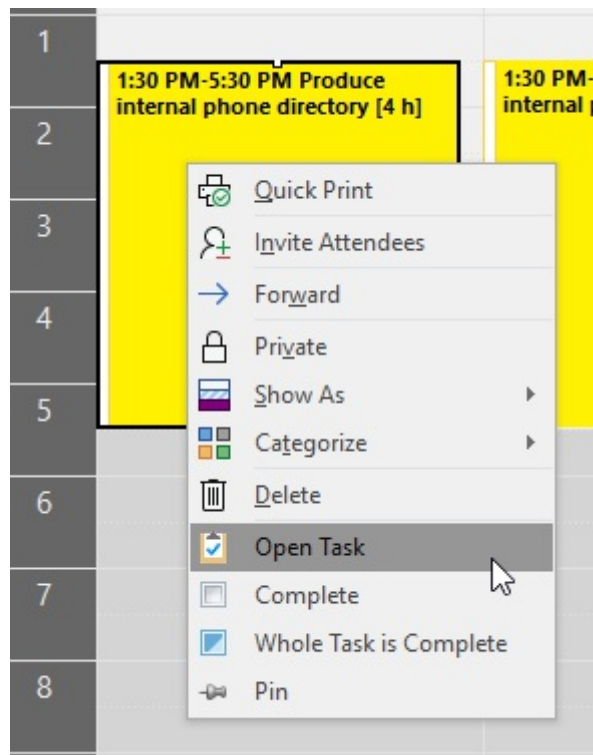
Taskline adds an **Open Task** button to a **calendar task entry**, so that you can quickly open the task it represents. This button is on the **Taskline** section of the Appointment ribbon:

1. Open the **calendar task entry** to display the **calendar task entry** ribbon
2. Click the **Open Task** button



## Tips

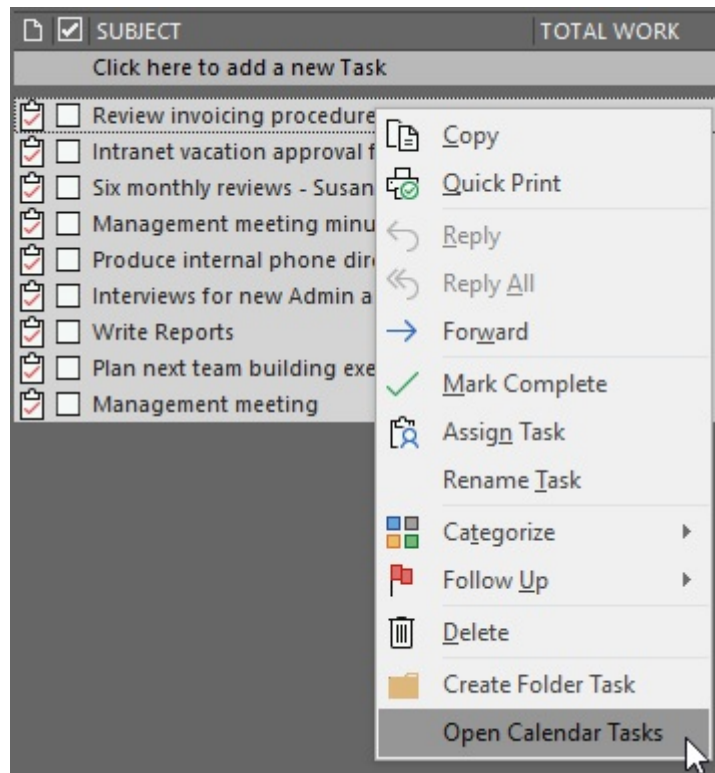
- You can also open the task by right clicking a **calendar task entry** in Outlook's calendar and selecting **Open Task** from the popup menu. This is usually quicker as there's no need to open the item first
- You can also open several tasks at once by selecting several **calendar task entries** and right clicking any one of them



### Accessing Calendar Task Entries via the Task

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You also can quickly open all the **calendar task entries** belonging to a task. Right click the task and click the **Open Calendar Tasks** option on the pop-up menu.



### Keeping Task Entries Private

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If you work in a group and your calendar folder is visible to other people, for example you use Microsoft Exchange Server to share your calendar folder, then you may wish to keep some or all of your task entries private:

- To have Taskline create all **calendar task entries** as private, select the **Mark all as private** checkbox, which is on the Calendar tab of the Taskline Settings dialog
- If the **Mark all as private** option is not selected, then Taskline will still create private **calendar task entries** for tasks marked as private

## Related Topics

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[Giving Calendar Task Entries Colors](#)

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[Accessing a Task via its Task Entry](#)

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[Keeping Task Entries Private](#)

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[Displaying Times for All Appointments on the Calendar](#)

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[About Appointments](#)

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[Calendar Views](#)

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[Defining the Subject of Task Entries](#)

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[Manually Overriding Some or all of Taskline's Scheduling](#)

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## Giving Calendar Task Entries Colors

Taskline optionally creates **calendar task entries**, which are appointments in Outlook's calendar that represent tasks. [How?](#) You can tell Taskline to give **calendar task entries** certain colors, for example to distinguish them from ordinary appointments, or highlight important items.

### Note

- Taskline uses a feature of Outlook 2003 called **Labels** to color **calendar task entries**. Later versions of Outlook work correctly with **Labels**, but label commands are no longer shown in Outlook's menus and dialogs. Instead, newer Outlook versions prefer to use **Categories** to color appointments. In Outlook 2010 and later, if appointments or **calendar task entries** are assigned a **Category**, then the **Category** color is shown, rather than the **Label** color. Thus, if you want to color **Calendar Task Entries** using **Labels**, select Taskline's **Always set to Advanced** option and leave the edit box blank (these are the settings Taskline has after installation). [More](#) In Outlook 2010 and later, **Label** colors are only shown if appointments and **calendar task entries** do not have any **Categories** assigned.


Taskline allows **calendar task entries** to be colored differently according to task attributes, such as **Category** or **Project**. Select the **Calendar** tab of the Taskline Settings dialog and click the **Define Colors** button. The resultant **Calendar Task Entry Colors** dialog allows you to set rules that control whether **calendar task entries** are created and, if so, what color is used. The table on this dialog lists the existing rules. You can color and control the creation of **calendar task entries** based on:

<b>High/Medium/Low Priority</b>	This refers to the High/Medium/Low priority that can be assigned to Outlook tasks, for example by using the <b>Priority</b> drop down list on the Tasks tab of the task form. Each <b>Priority</b> can be assigned a different color
<b>Priority letter</b>	You can color tasks based on the letter of their <b>Priority (A1)</b> value; the <b>Priority (A1)</b> number is ignored. The <b>Category Etc</b> drop down list will only show those <b>Priority (A1)</b> letters that are currently assigned to tasks
<b>Milestones</b>	You can color milestones differently to highlight them on the calendar. You will need to place the <b>Milestones</b> rule before any <b>Not Started Tasks</b> or <b>Completed Tasks</b> rules, as milestones are also tasks
<b>Completed or Not Started</b>	You can color completed work differently to outstanding work
<b>Category</b>	Tasks can be assigned a <b>Category</b> in Outlook, for example by clicking on the <b>Categories</b> button on the Tasks tab of the task form. You can then instruct Taskline to color <b>calendar task entries</b> differently, depending on the <b>Category</b> that has been assigned to the task. Note that the <b>Category Etc</b> drop down list will only display task <b>Categories</b> that are currently assigned to tasks. If no task <b>Categories</b> have been assigned, no <b>Categories</b> will be displayed in the drop down list
<b>Project</b>	Tasks can be assigned a <b>Project</b> using the <a href="#">Taskline tab</a> of the task form in Outlook. <a href="#">How?</a> The <b>Categories Etc</b> drop down list will display all current project names. You cannot add new project names from the <b>Calendar Task Entry Colors</b> dialog. Use the <b>Projects</b> tab to do this <a href="#">More about projects</a> .
<b>Working Hours</b>	<b>Working Hours</b> are defined using the <b>Working Hours</b> tab of the



	Taskline Settings dialog <a href="#">How?</a> and assigned to tasks using the Taskline task form in Outlook <a href="#">How?</a>
<b>Folder</b>	You can color <b>calendar task entries</b> differently based on a task's <b>Folder</b> . The <b>Categories Etc</b> drop down list will display all the <b>Folder</b> names in your selected <b>Schedule tasks in</b> folder. If you don't see any <b>Folder</b> names in the list, check that the <b>Include subfolder</b> check box, on the Tasks tab of the Taskline Settings dialog, is selected
<b>Overdue</b>	Overdue tasks are defined as those with a missed task constraint or tasks where the <b>Due</b> date is in the past
<b>Pinned</b>	Use this setting to color <b>Pinned calendar task entries</b> differently
<b>Waiting</b>	Use to give tasks that are <b>Waiting on someone else</b> a different color
<b>Recurring</b>	Use to assign a color to <b>Recurring</b> or <b>Regenerating</b> tasks

## Notes

- To prevent the creation of **calendar task entries** for one or more **Category Etc** value, select  from the color drop down list
- If a task satisfies multiple rules, it will be assigned a color according to the earliest rule in the list. You can use the **Move Up** and **Move Down** buttons to change a rule's position in the list

To Do This	Do This
Add a new rule	Select a task <b>Category Etc</b> and a Color using the drop down lists, then click the <b>Insert New</b> button. You cannot create more than one rule for the same <b>Category Etc</b>
Update an existing rule	Click on an existing rule to select it, then change the <b>Category Etc</b> or the color using the drop down lists below the table. To commit your change, click a blank area of the table, or click a different rule in the table, or click the <b>Update</b> button
Delete a rule	Select a rule and click <b>Delete</b> to remove it

In the following example, task "Interviews for new admin assistant" has been completed, and the task "Produce internal phone directory" is currently in progress. All the other tasks are not yet started. Additionally, tasks have been assigned a **Project**:

<input type="checkbox"/>	<input checked="" type="checkbox"/>	SUBJECT	TOTAL WORK	SCHEDULED START	SCHEDULED END
Click here to add a new Task					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Interviews for new Admin assistant	2 hours	Mon 8/16/2021 9:00 AM	Mon 8/16/2021 11:00 AM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Produce internal phone directory	11 hours	Mon 8/16/2021 11:00 AM	Wed 8/18/2021 10:30 AM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Management meeting	2.5 hours	Tue 8/17/2021 9:00 AM	Tue 8/17/2021 11:30 AM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Management meeting minutes	1 hour	Tue 8/17/2021 11:30 AM	Tue 8/17/2021 12:30 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Six monthly reviews - Susan and Peter	2 hours	Wed 8/18/2021 10:30 AM	Wed 8/18/2021 12:30 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Intranet vacation approval form	6 hours	Wed 8/18/2021 3:00 PM	Thu 8/19/2021 12:30 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Review invoicing procedures	5 hours	Thu 8/19/2021 1:30 PM	Fri 8/20/2021 10:00 AM

The **Calendar Task Entry Colors** dialog is then used to assign a color to each **calendar task entry**, based on **Project**. Note that completed **calendar task entries** will always be shown gray, regardless of **Project**, because this rule is first in the list:

Category Etc	Color
<Completed>	
[Project] Office	
[Project] Meeting	
[Project] Personnel	

The resultant calendar view looks like this:

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
	16	17	18	19
9 <sup>AM</sup>	[X] Interviews for new Admin assistant [2 h]	Management meeting [2.5 h]	Produce internal phone directory [1.5 h]	Intranet vacation approval form [3.5 h]
10				
11	[X] Produce internal phone directory [1.5 h]	Management meeting minutes [1 h]	Six monthly reviews - Susan and Peter [2 h]	
12 <sup>PM</sup>				
1	Produce internal phone directory [4 h]	Produce internal phone directory [4 h]	Dentist	Review invoicing procedures [4 h]
2				
3			Intranet vacation approval form [2.5 h]	
4				
5				

## Defining the Subject of Task Entries

---

You can control what subject Taskline gives **calendar task entries**. By default, a task called "Tidy office" with 1.5 hours of **Total Work** will have its task entry called "Tidy office [1.5 hrs]".

Click the **Define Subject** button on the **Calendar** tab of the Taskline Settings dialog to display the **Calendar Task Entry Subject** dialog. This allows you to change the templates that are used to define the **Subject** of a **calendar task entry**. The templates usually contain tokens, which are the items starting with **<** and ending with **>**. These are replaced by actual values from the task or the **calendar task entry** to create the task entry subject.

There are four templates shown in four boxes. The first template is used to define the subject of task entries for work that is still outstanding. The second template is used for task entries that represent completed work. The third is used for milestones that are yet to be achieved and the last is used for completed milestones. [More about milestones](#)

For example, if you type "**<TaskSubject>**" as the template, then each **calendar task entry** will be given the subject of the task it represents. **<TaskSubject>** is an example of a **token** – which is some text that gets replaced by whatever it represents. There are many different tokens available. For example, **<TaskTotalWork>** represents the task's duration.

Any characters in the template that are not part of a token get copied to the **calendar task entry Subject** unchanged. For example, if you entered "Task duration is **<TaskTotalWork>**" as your template then, for the example above, the **calendar task entry** would be given the Subject "Task duration is 1.5 hrs".

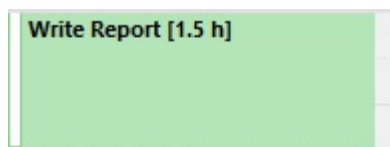
A link to the complete list of available tokens is shown below. Some represent task details, others represent **calendar task entry** details. On the **Calendar Task Entry Subject** dialog, you can see whether the template you type in is correct, because the dialog shows you the results of processing your template for an imaginary task and milestone.

### Note

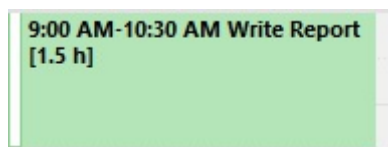
- The **Enable times tokens** option allows you to quickly remove times from the subjects of calendar task entries. This can be useful when switching between Outlook views, because some Outlook calendar views benefit from times, while others don't. Specifically, if this option is deselected, then the following tokens act as empty strings: **<StartEndTime>**, **<StartTime>** and **<EndTime>**. All other tokens are unaffected.

## Displaying Times for Calendar Task Entries

---



Calendar task entry without times



Calendar task entry showing Start and End times by using the **<StartEndTime>** token

Outlook does not display times on the calendar's Week and Work Week views. If you want your **calendar task entries** to display times, use the **<StartEndTime>** token and select the **Enable times tokens** option:

Calendar Task Entry Subject?×

Define template

The subject for a calendar task entry is defined using the templates below. The templates contain tokens (in angle brackets<>) that are replaced by values from the task and the calendar entry when Taskline is run.

☒ Enable times tokens

Subject for outstanding entry

## Related Topics

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[Tokens Reference](#)

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[Showing Your Tasks in the Outlook Calendar](#)

---

[Milestones](#)

---

## Tokens That Refer To Calendar Task Entries

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Token Name	Description
<EndDate>	The date the <b>calendar task entry</b> ends on
<EndTime>	The time the <b>calendar task entry</b> ends on
<StartEndTime>	This token is equivalent to "<StartTime> - <EndTime> ", for example "9:00 – 10:30 ". Note the space at the end of the token
<StartDate>	The date the <b>calendar task entry</b> starts on
<StartTime>	The time the <b>calendar task entry</b> starts on
<Work>	The duration of the <b>calendar task entry</b> , unless the <b>calendar task entry</b> is an <b>All day event</b> representing a task that is <b>Waiting on someone else</b> , in which case the task's <b>Total Work</b> is used

## Tokens That Refer To Tasks

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Token Name	Description
<Task%Complete> <AlignStartEndTime>	How complete the task is. This value is not necessarily the same as the <b>% Complete</b> value entered on the task form, as <b>Actual Work</b> is taken into account as well <a href="#">More information</a> . This token is blank if the task is not started
<Task%Rem>	How much work remains to be done on the task, expressed as a percentage
<TaskA1>	The task's <b>Priority (A1)</b> value
<TaskActualStart>	The task's <b>Actual Start</b> date
<TaskAttach>	Shows [A] if the task has attachments
<TaskCategories>	The task's <b>Categories</b>
<TaskCompanies>	The task's <b>Companies</b> text, taken from the <b>Details</b> tab of the task form
<TaskEndDate>	The task's <b>Scheduled End</b> date
<TaskEndTime>	The task's <b>Scheduled End</b> time
<TaskFolder>	The name of the subfolder that contains the task
<TaskHours>	A task's <b>Working Hours</b>
<TaskNotes>	Shows [N] if the task has notes
<TaskProject>	The <b>Project</b> setting for a task
<TaskRole>	The task's <b>Role</b> text. This is a standard task property that is not shown on the task form. You must add a column to the task view in Outlook to set it
<TaskStartDate>	The task's <b>Scheduled Start</b> date
<TaskStartTime>	The task's <b>Scheduled Start</b> time
<TaskSubject>	The task's <b>Subject</b>
<TaskTotalWork>	The task's <b>Total Work</b>
<TaskWorkDone>	How much has already been done on the task, expressed as a duration
<TaskWorkRem>	How much work remains to be done on the task, expressed as a duration

## Related Topics

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[Defining the Subject of Task Entries](#)

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## Getting the Most out of Outlook Views

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This section summarizes aspects of Outlook's view handling that are most useful to Taskline users. You should consult Outlook's own documentation for full information on how to work with Outlook's views – only brief details are included here.

### Customizing the Task Table View

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This section describes how to get Outlook's task table looking just how you want. Once you have done that, you may well want to name and save your settings, so that you can switch to a different view, and then switch back to your own custom view settings very easily.

Before you start to customize a view, it is safer to create a new view first, and customize that. [How?](#)

### Creating New Views and Copying Existing Views

---

Rather than alter one of Outlook's or Taskline's predefined views, it is safer to first create a new view to contain your custom view settings. You must do this before you start customizing the view, if you don't want to modify the current view as well.

It is often quicker to create a copy of an existing view, and modify that, rather than create a new view from scratch, so this is the technique that will be described here.

1. Click the **View** ribbon → **Change View** → **Save Current View As a New View**. The **Copy View** dialog will appear
2. Enter a name for your new view
3. Choose the appropriate **Can be used on** setting
4. Click OK. Then follow the instructions for switching named views below

### Switching Named Views

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To switch to a different view:

- Click **View** ribbon → **Change View**

### Resetting Standard Outlook Views

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If you inadvertently change one of Outlook's predefined views, you can revert to its original settings:

- Click **View** ribbon → **Reset View**

### Adding New Columns

---

You will probably want to add extra columns to the task view to show some useful Taskline task information, such as **Scheduled Start** and **Priority (A1)**. You may want to create a new view before adding new columns [How?](#)

To add new columns, right-click any column heading and select **Field Chooser** from the pop up menu. You can now drag fields off the **Field Chooser** dialog and onto the table view column headers. The table view will then display that field for each task.

To get the **Field Chooser** to display fields that are special to Taskline tasks, click the drop down list at the top of the **Field Chooser** dialog and select the **User-defined fields**



in folder option.

Once the **User-defined fields in folder** option is selected, you will see all of the special fields that Taskline defines for Taskline tasks. You can drag these off the **Field Chooser** and onto the table column headers, to have the table view display Taskline fields.

### Note

- Any field beginning with an "@" symbol is for Taskline's internal use only; if you alter these fields you will probably stop Taskline from working correctly.

### Changing the Way Columns and Column Values are Displayed

---

By default, columns in Outlook's table views get the name of the field they represent. This is usually fine, but sometimes you may wish to change it. For example, you may wish to change the name of the **Scheduled End** column to **Sched End**, to make the column narrower.

To rename a column:

- Right-click the column heading and select **View Settings** from the menu. Then click the **Format Columns** button

The **Format Columns** dialog will appear. You can change the column name by changing the **Label** text on the dialog. Other controls on this dialog allow you to change how the column values are displayed, for example left, centre or right aligned.

### Removing Unwanted Columns

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Simply drag an unwanted column off the column heading row.

### Sorting

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You can sort on a column simply by clicking the column header. For example, to sort your task list into **Scheduled Start** order, click the **Scheduled Start** column heading. Click a second time to sort into reverse order.

To sort on a field that is not displayed, or to sort on more than one field, or to switch off sorting, you will need to use the **Sort** dialog. To access this, do the following:


- Right-click the column heading and select **View Settings** from the menu. Then click the **Sort** button.

If you wish to sort on any Taskline special fields, you will need to select **User-defined fields in folder** from the **Select available fields from** drop down list on the dialog.

### Grouping

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A group is a set of items with something in common, such as the same priority. You can group common items together under one heading, which can be expanded by clicking on the + or ▸ buttons to show all of the contained items, or contracted, by clicking on the - or ◀ buttons, to conceal them. For example, Taskline tasks contain a **Week Commencing** field – this can be a convenient way of grouping tasks:

 <input checked="" type="checkbox"/> SUBJECT	TOTAL WORK	SCHEDULED START
Click here to add a new Task		
▲ Week Commencing: 16 August 2021 00:00: 7 item(s)		
<input checked="" type="checkbox"/> <input type="checkbox"/> Plan next team building exercise	2 days	Mon 2021-08-16 09:00
<input checked="" type="checkbox"/> <input type="checkbox"/> Interviews for new Admin assistant	2 hours	Wed 2021-08-18 11:30
<input checked="" type="checkbox"/> <input type="checkbox"/> Produce internal phone directory	11 hours	Wed 2021-08-18 16:00
<input checked="" type="checkbox"/> <input type="checkbox"/> Management meeting	2.5 hours	Tue 2021-08-17 09:00
<input checked="" type="checkbox"/> <input type="checkbox"/> Management meeting minutes	1 hour	Tue 2021-08-17 11:30
<input checked="" type="checkbox"/> <input type="checkbox"/> Six monthly reviews - Susan and Peter	2 hours	Fri 2021-08-20 09:30
<input checked="" type="checkbox"/> <input type="checkbox"/> Intranet vacation approval form	1 day	Fri 2021-08-20 11:30
▲ Week Commencing: 23 August 2021 00:00: 2 item(s)		
<input checked="" type="checkbox"/> <input type="checkbox"/> Review invoicing procedures	4 hours	Mon 2021-08-23 11:00
<input checked="" type="checkbox"/> <input type="checkbox"/> Write Reports	1 day	Mon 2021-08-23 16:00

To choose what field to group by, right click on a column heading and select **Group By This Field** from the pop-up menu. For more control, for example to group by more than one field, do the following:

- Right-click the column heading and select **View Settings** from the menu. Then click the **Group By** button on the **Advanced View Settings** dialog

If you wish to sort on any Taskline special fields, you will need to select **User-defined fields in folder** from the **Select available fields from** drop down list on the dialog

### Conditional Formatting in Outlook Views

You can use **Conditional Formatting** in Outlook to make any view display different types of tasks in a different text style or color.

#### Highlighting Folder Tasks

To change the appearance of Taskline **Folder Tasks**, open a tasks folder in Outlook. Then:

1. Click **View** tab → **View Settings** → **Conditional Formatting**. This will display the **Conditional Formatting** dialog
2. Click the **Add** button and give the formatting a name, e.g. "Taskline items"
3. Click the **Condition** button, then the **Advanced** tab
4. Click **Field** → **User-defined fields in folder** → **@TaskType**. Leave the **Condition** as **equals** and type 16 into the **Value** box, if you want to change the appearance of **Folder Tasks**, or a **Value** of 4, if you if you want to set up conditional formatting for the **Root Summary Task**
5. Click **Add To List**, then **OK** to return to the **Conditional Formatting** dialog
6. Click **Font**, then choose how you would like **Folder Tasks** displayed
7. Click **OK** on all the open dialogs to save your changes

#### Highlighting Tasks With Missed Constraints

To highlight tasks that have missed their constraints, for example missed their deadlines, repeat the above steps. But replace step 4 by:

- Click **Field** → **User-defined fields in folder** → **Missed Constraint**. Change the **Condition** to **is more than** and type 0 into the **Value** box

**Related Topics**

[Fields Specific to Taskline Tasks](#)

[Predefined Outlook Views](#)

## Fields Specific to Taskline Tasks

Field Name	Description
A1	This field represents how important each task is, so that Taskline can schedule the more important tasks first. This field is equivalent to the <b>Priority (A1)</b> value on the Taskline form. <b>A1</b> contains a letter and an optional number. <a href="#">More</a>
ABC	<b>ABC</b> contains just the letter of <b>Priority (A1)</b> , if set. This allows you to group Outlook views by this letter.
Actual Start	This is the date the task actually started. It is only set for a task that is <b>In Progress</b> or <b>Completed</b> . See <a href="#">Progress Fields on a Taskline Task</a> for more information.
Constraint	This is the external constraint on the task. It can either be blank, or set to one of <b>Start on</b> , <b>Start on or after</b> , <b>Finish on</b> , <b>Finish on or before</b> or <b>Work between</b> . <a href="#">More</a>
Constraint Date	This is the date and time corresponding to any constraint. If no constraint time is set, a time of 0:00 is shown. <a href="#">More</a>
Hours Remaining	This is same as the value for <b>Work Remaining</b> , but is always represented as a number of hours.
Max Time Per Day	This is used to limit how much time is allocated each day to a longer task. <a href="#">More</a>
Max Time Per Week	This is used to limit how much time is allocated each week to a longer task. <a href="#">More</a>
Min Split	This is the smallest duration that a task can be split into. <a href="#">More</a>
Missed Constraint	This field is normally zero. However, when a task <b>Constraint</b> can't be met, Taskline sets <b>Missed Constraint</b> to the elapsed gap between the scheduled date and the <b>Constraint Date</b> . You can use this field to configure Conditional Formatting in Outlook to automatically highlight tasks that have missed constraints. <a href="#">How?</a>
Project	This denotes the name of the project that the task belongs to, if any. <a href="#">More</a>
Remind	Whether a Taskline <b>Reminder</b> has been set. <a href="#">More about reminders.</a>
Remind Minutes	If a Taskline <b>Reminder</b> has been set, this field represents how many working minutes before the <b>Scheduled Start</b> the <b>Reminder</b> should go off. <a href="#">More about reminders.</a>
Schedule Task	If this box is checked, Taskline schedules the task. If not, Taskline ignores it.
Scheduled End	The date and time the task is scheduled (or planned) to end. <a href="#">More</a>
Scheduled Start	The date and time the task is scheduled (or planned) to start. <a href="#">More</a>
Show As	The <b>Show as</b> appearance to be assigned to this task's <b>calendar task entries</b> .
Split	A way of showing if the task can be split into several shorter parts during scheduling. The value is true if the task can be split and false otherwise. <a href="#">More</a>
Task Priority	A way of saying how important each task is, so that Taskline can schedule the more important ones first. This field supports tasks created with Taskline Version 2.0 and older. This field is not recommended for use with tasks created with Taskline Version 2.1 and newer.

Week Commencing	The date of the start of the week that the task starts on. This field is useful for grouping tasks on an Outlook table view. <a href="#">More about grouping</a>
Work Remaining	You cannot set <b>Work Remaining</b> as Taskline calculates this value. <b>Work Remaining</b> shows the amount of work that is still outstanding on the task. <a href="#">More</a>
Working Hours	The <b>Working Hours</b> assigned to the task. <a href="#">More</a>

## Related Topics

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[The Taskline Task Form](#)

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## Predefined Outlook Views

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This section summarizes some of the predefined Outlook views that may be useful to Taskline users.

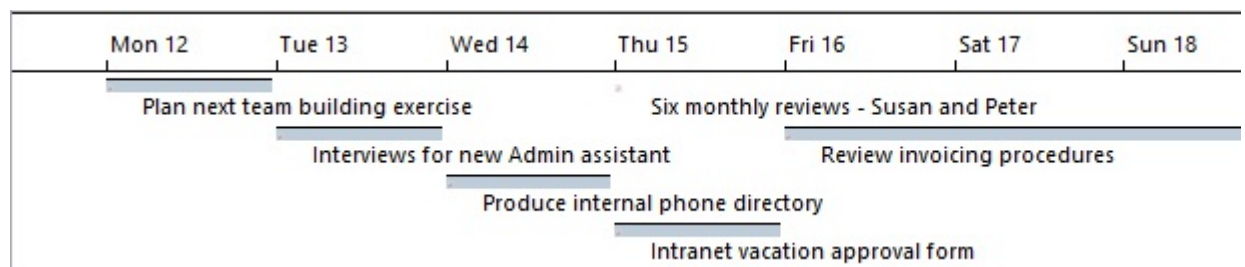
Note that the **Task Timeline**, **Next Seven Days** and **Overdue Tasks** views all use the task **Due Date**, with the **Task Timeline** view using **Start Date** as well. Therefore, for these views to work correctly, you must either:

1. Have the **Taskline should set Start and Due to the Scheduled dates** Taskline option enabled [How?](#)
2. Or change the view properties so that these views use **Scheduled Start** and **Scheduled End** instead. Do one of the following:
  - Click **View** ribbon → **View Settings**
  - On the **Advanced View Settings** dialog, click the **Columns** button. This takes you to the **Date/Time Fields** dialog, which allows you to change the fields these views use to ascertain the start and ends of tasks

### Task TimeLine View

---

The **Task Timeline** view shows a time scaled bar chart:



To use this view:

- Outlook does not come with a predefined **Task Timeline** view so you will need to create one:
  - Click **View** ribbon → **Change View** → **Manage Views**
  - Click the **New** button to display the **Create a New View** dialog
  - Give the view a name and select the **Timeline** option in the **Type of view** list
  - OK all the open dialogs

### Next Seven Days

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This view displays only those tasks that are due in the next 7 days. But be careful – this view excludes overdue tasks!

### Overdue Tasks

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This view displays only those tasks that are not yet complete but with a **Due Date** that has passed.

### Related Topics

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[Customizing the Task Table View](#)

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## Printing Your Task Schedule

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Having a printed Taskline schedule on your desk can help to give you focus by reminding you what needs to be done and by when. Printing out a calendar containing Taskline's **calendar task entries** is particularly helpful, because you can easily see what you should be currently working on. To print your calendar schedule, open your calendar folder and then:

1. Click **File** ribbon → **Print** to display the **Print** screen
2. In the **Settings** list on the **Print** screen or dialog, click the style you wish to print. **Monthly Style** is particularly useful for printouts, and corresponds to the **Monthly** calendar view
3. Click the **Print Options** button to display the **Print** dialog
4. Choose a date range by using the **Print Range** settings on the **Print** dialog to say when you want the printout to start and end
5. Set the font for printing. Click the **Page Setup** button on the **Print** dialog. Here you can change the print font without changing the on-screen font. Arial Narrow is particularly useful for printing
6. On the same dialog, for the **Monthly Style** only, it is often useful to clear the **Print Exactly One Month Per Page** check box, if you are printing out a schedule mid-month
7. Click **OK** on the **Page Setup** dialog to save your changes and then click **OK** on the **Print** dialog to print your schedule
8. You may also wish to filter your calendar before printing. For example, you may have routine reminders in your calendar that you don't want to appear on your printout. You could filter on for example **Category** or **Show time as** to remove certain types of appointments from your printout. Please consult Outlook's documentation for instructions on filtering views

## Progress: Working Through Your Task List

---

As you work through your task list, you will want to mark up your progress for the following reasons:

1. You know what has been done and what is still to do
2. Taskline carries forward uncompleted work, scheduling it for a future date. If Taskline isn't told when task work has been completed, this work will get carried forward too, and hence the resultant schedule will not be correct

Marking up progress also optionally allows you to keep an accurate record of what work you have completed, and when it was done.

When scheduling tasks, Taskline places tasks (or parts of tasks) that still have outstanding work after the **First task starts at** date. Completed tasks, or completed parts of tasks, are never scheduled by Taskline. These are left alone as they form an historical record of past work. On completed tasks you have the opportunity to record information about how the task went, such as how much time you actually spent on it – **Actual Work** – and when you actually started it – **Actual Start**.

Tasks can be at any stage of progress, from **Not Started**, to **Completed**, or any part-complete stage in between. Taskline can also show tasks in the calendar. These appointments, used to represent tasks, are called **calendar task entries** and they can also record progress. Unlike tasks however, **calendar task entries** cannot be part-completed, but rather only **Not Started** or **Completed**. You can mark up progress on both tasks and **calendar task entries**. Adding progress to a task will automatically add the same amount of progress to its **calendar task entries**, and vice versa.

Sometimes it's sufficient to mark tasks as **Complete** and then just forget about them. However, if you wish to keep a record of exactly what you did, and when, you should select the **Keep a record of completed work** option, which is on the **Calendar** tab of the Taskline Settings dialog. If this option is selected, completed **calendar task entries** are left alone by Taskline. If things didn't go exactly according to schedule, and you want to maintain an accurate historical record of your work, edit the completed **calendar task entries** in Outlook, just like you would any other appointment, to reflect what actually happened.

Keeping a work record can be very useful, both as a time record for yourself and others, and also as a bank of historical information which can be used to help produce more accurate time estimates for future work.

If you are not interested in past work, deselect the **Keep a record of completed work** option. This will instruct Taskline to remove completed **calendar task entries** when it runs (completed tasks are not deleted).

### Related Topics

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[Progress Fields on a Taskline Task](#)

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[The Effect on Calendar Task Entries of Adding Task Progress](#)

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[Recording Task Progress via Outlook's Calendar](#)

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[Keeping Task Work Estimates Up-to-Date](#)

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## Progress Fields on a Taskline Task

On the **Taskline** tab of the task form in Outlook, there are several fields that specifically relate to task progress. You record your progress by updating one or more of these fields:

<b>Actual Start</b>	<p>This field records exactly when you started work on a task. Before you add any progress, you have the opportunity to set this field, although doing so is optional. If you don't set it, Taskline will set it for you:</p> <ul style="list-style-type: none"><li>▪ If <b>calendar task entries</b> exist for the task, then the task <b>Actual Start</b> is taken from the <b>Start</b> of the first <b>calendar task entry</b></li><li>▪ Otherwise, it's assumed that the task started on schedule and <b>Actual Start</b> is set to equal to the <b>Scheduled Start</b></li></ul> <p>Other <b>Actual Start</b> guidelines are:</p> <ul style="list-style-type: none"><li>▪ For a task that is part completed, <b>Actual Start</b> will show when the task started, <b>Scheduled Start</b> will show when the remaining part of the task should be started, and <b>Scheduled End</b> will show when the task is due to be fully completed</li><li>▪ For a completed task, <b>Scheduled Start</b> will show when the task started (i.e. it is set to be the same as <b>Actual Start</b>) and <b>Scheduled End</b> will show when it ended</li></ul>
<b>Actual Work</b>	<p>This field gives you the opportunity to record the amount of work you have actually done on a task to date. Setting <b>Actual Work</b> to something greater than zero will update the <b>Status</b> to <b>In Progress</b>. Updating this field is optional, you can simply ignore it if you prefer. However, <b>Actual Work</b> is useful because it gives you the opportunity to record how much time you <i>actually</i> spent on a task, as opposed to the <b>Total Work</b> field, which is how much time you originally <i>thought</i> you would spend on it. It may be useful to look back at this information when scheduling similar work at a future date. Or, you or your manager may find the information useful now, so that you both know where all your precious time went!</p>
<b>% Complete</b>	<p>Similar to <b>Actual Work</b>, this records what percentage of the task has been completed to date. Updating this field is optional, you can simply ignore it if you prefer. Setting <b>% Complete</b> to zero will automatically set <b>Status</b> to <b>Not Started</b>, setting it to 100% will set <b>Status</b> to <b>Completed</b> and setting it to a value between 0 and 100 will automatically set <b>Status</b> to <b>In Progress</b>.</p> <ul style="list-style-type: none"><li>▪ Because of a restriction in the way Outlook works, <b>% Complete</b> is always rounded to the nearest whole number. For example, Taskline will see 10.5% as 11%, even though the task form shows 10.5%</li><li>▪ For convenience, a <b>% Complete</b> setting of 33% is taken to be exactly one third, and a <b>% Complete</b> setting of 67% is taken to be exactly two thirds. For example, a 6 day task that is 33% complete will have exactly 4 days remaining</li></ul>
<b>Work Remaining</b>	<p>This information is display only – you cannot edit it. As you enter progress, the <b>Work Remaining</b> field updates to show you how much work remains to be done</p>
<b>Status</b>	<p>This field has several values but the three that concern progress are <b>Not Started</b>, <b>In Progress</b> and <b>Completed</b>. Setting <b>Status</b> to <b>Not Started</b> will automatically set <b>% Complete</b> to zero and setting <b>Status</b> to <b>Completed</b> will set <b>% Complete</b> to 100. Setting the <b>Status</b> to <b>In Progress</b> does not, in itself, add progress to a task. It merely marks the task as having been started</p>

## Tips

- You can add any of the above fields to an Outlook task table view, so that you don't need to open the form to see them
- You can set the **% Complete** and **Status** fields on either the **Task** tab, or the **Taskline tab**, of the task form

For tasks, whether you set **% Complete** or **Actual Work** is up to you. If you think to yourself "I have done half of this task," then it is natural to set **% Complete** to 50%. If, on the other hand, you think to yourself "I have spent 3 hours on this task so far," then set the **Actual Work** to 3 hours. However:

- **Milestones** (which are effectively goals) cannot be progressed using **Actual Work**, as they have no work to progress. Use **% Complete** or **Status** to mark milestones as complete. [More about goals and milestones](#)
- You cannot mark a task as **Complete** by setting **Actual Work** alone. You can only mark a task as complete by checking the **Complete** check box, or setting **Status** to **Completed**, or by setting **% Complete** to 100%

You can set both **% Complete** and **Actual Work** if you wish. In this case, Taskline uses the field that gives the greatest amount of progress. For example, if a 10 hour task is marked as 20% complete and with 5 hours of **Actual Work**, Taskline will treat the task as being 50% complete, because 5 hours **Actual Work** out of 10 hours **Total work** is 50%.

A minimalist approach to tracking progress is to simply set **Status** to **Completed** as tasks are finished. This method doesn't track progress accurately, and doesn't give you an "actual versus predicted" task history, but nonetheless it is still a perfectly valid way of working.

## Related Topics

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[Progress: Working Through Your Task List](#)

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[The Effect on Calendar Task Entries of Adding Task Progress](#)

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[Recording Task Progress via Outlook's Calendar](#)

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[Keeping Task Work Estimates Up-to-Date](#)

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## The Effect on Calendar Task Entries of Adding Task Progress

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Adding or removing progress on a task will automatically set an equivalent amount of progress on that task's **calendar task entries**. Because a **calendar task entry** can only be **Not Started** or **Complete**, this may involve splitting **calendar task entries**. For example, if a 1 hour task with a single 1 hour **calendar task entry** is made 33% complete, this will result in one completed 20 minute **calendar task entry** and one **Not Started** 40 minute **calendar task entry**.

If you have set **Actual Start** when task progress is first added, then the first **calendar task entry** will be moved so that it starts on the task's **Actual Start**.

### Related Topics

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[Creating task entries in the calendar](#)

---

[Progress: Working Through Your Task List](#)

---

[Progress Fields on a Taskline Task](#)

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[Recording Task Progress via Outlook's Calendar](#)

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[Keeping Task Work Estimates Up-to-Date](#)

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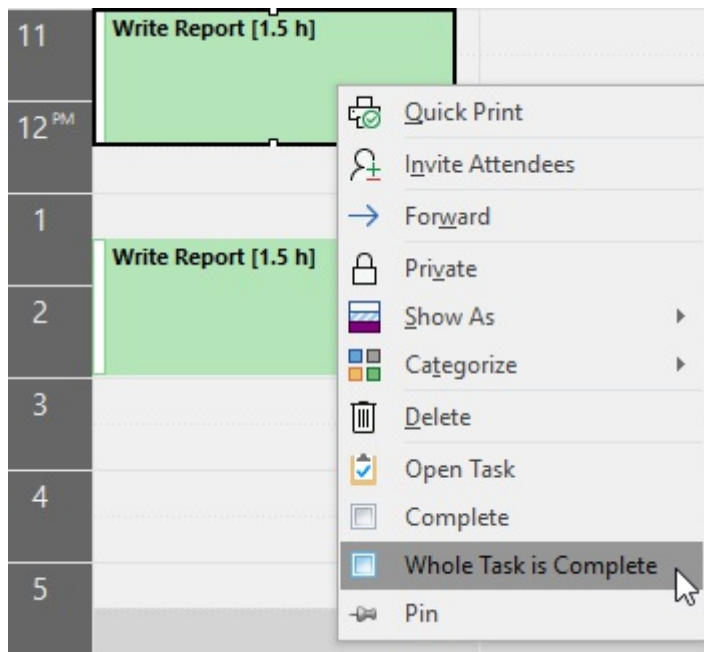
## Recording Task Progress via Outlook's Calendar

There is just one progress field on a **calendar task entry** – **Complete**. To set this:

1. Open the **calendar task entry** to display the Outlook Appointment form
2. Click the **Complete** button on the ribbon to mark the **calendar task entry** as complete and click **Save and Close** to commit your change

### Tips

- You can also use the context menu, which is often quicker. Right click the **calendar task entry** in Outlook's calendar and click **Complete** in the popup menu
- You can also add or remove progress to or from several items at once by selecting several **calendar task entries** and right clicking any one of them. The clicked menu option will then apply to all selected **calendar task entries**
- When using the right-click menu, there is also a **Whole Task is Complete** option. This is equivalent to clicking the **Open Task** button, then setting **Status** to **Completed** and clicking **Save and Close** on the task



### Note

- If a **calendar task entry** is only partially complete, and you wish to record this, then you will need to add progress via the task

Adding or removing progress on a **calendar task entry** will automatically add or remove an equivalent amount of progress on the task:

- If a task has just one **calendar task entry**, then setting the **calendar task entry** as **Complete** will also mark the task as **Complete**. Similarly, clearing the **Complete** check box on a **calendar task entry** will mark the task as **Not Started**. In both cases, task **Actual Work** will be updated.
- If one task has several **calendar task entries**, then the task will be updated proportionately. For example, consider a 2 hour task which has two 1 hour **calendar task entries**:
  - Marking one of these **calendar task entries** as **Complete** will set the task to

50% Complete, **Status** to **In Progress** and **Actual Work** to 1 hour

- Marking the second **calendar task entry** as also **Complete** will set the task to 100% Complete, **Status** to **Complete** and update **Actual Work** to 2 hours

If a **calendar task entry** took more or less time than expected, first edit it in Outlook to reflect this, then mark it as **Complete**.

If you started work on a task at a different date and/or time to the one scheduled, and you want to record this, move the first **calendar task entry** to its correct time slot before marking it as **Complete**. This will set the task's **Actual start** accordingly.

For example, consider a 1 hour task with a single 1 hour **calendar task entry**. The task was scheduled to start at 10am and finish at 11am. However, you actually started at 9:30am, but finished as scheduled at 11am. In this case, change the **calendar task entry's Start Time** to 9:30am and then mark it as **Complete**. The task's **Actual Start** will get set to 9:30am and the task's **Actual Work** will be set at 1.5 hours.

#### Related Topics

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[Creating task entries in the calendar](#)

---

[Progress: Working Through Your Task List](#)

---

[Progress Fields on a Taskline Task](#)

---

[The Effect on Calendar Task Entries of Adding Task Progress](#)

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[Keeping Task Work Estimates Up-to-Date](#)

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## Keeping Task Work Estimates Up-to-Date

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As you enter progress, the **Work Remaining** field on the [Taskline](#) tab of the task form updates to show you how much work remains to be done. You could also add an **Work Remaining** column to an Outlook task table view, so that you don't need to open the form to see this information. [How?](#)

It may be that once you've started a task, you realize that your initial time estimate was not accurate. If this happens, you should update **Total Work**, as well as **Actual Work** or **% Complete**. For example, if a task was initially estimated to take 8 hours, but after 4 hours work you realize that you have another 6 hours left to complete the task, mark the **Actual Work** as 4 hours (or the % Complete as 40%) and the **Total Work** as 10 hours. The **Work Remaining** will then update to show 6 hours.

A common and avoidable mistake when scheduling work is to not update future work estimates to reflect past experience. For example, consider a 4 day task that you find yourself only half way through after 3 days. If the first half of the task took you 3 days, then it is generally reasonable to assume that the second half will also take 3 days. Therefore, the **Total Work** should usually be updated to 6 days in this case.

### Related Topics

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[Progress: Working Through Your Task List](#)

---

[Progress Fields on a Taskline Task](#)

---

[The Effect on Calendar Task Entries of Adding Task Progress](#)

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[Recording Task Progress via Outlook's Calendar](#)

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## Advanced Scheduling Techniques

### Task Constraints

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Sometimes it is not sufficient to simply have one task follow on after another. External constraints, such as deadlines, influence tasks. Taskline can take deadlines and other types of constraints into account when scheduling work.

Taskline features a rich set of **constraints** that can be used to override the normal sequencing of tasks. To set a **constraint**, first set the type of **constraint** using the drop down list in the **External constraint** section of the Taskline task form in Outlook. Depending on the type of constraint, you may then need to set the **Constraint Date** by typing the date in, or by using the **Date Picker** control. Setting a **Constraint Time** is optional; omitting it means that the constraint applies at any time during the specified day. This gives Taskline more scope to optimize the schedule.

Taskline supports 5 types of **constraints** that work with the constraint dates you supply:

- **Start on** to make the task start on the constraint date
- **Start on or after** to make the task start on or after the constraint date
- **Finish on** to make the task finish on the constraint date
- **Finish on or before** to make the task finish on or before the constraint date. Both **Finish on** and **Finish on or before** constraints are useful for deadlines
- **Work between** when you need to work on a task between 2 dates. For example, you have a deadline of 3 weeks tomorrow but you can't start work on the task until after a meeting next Monday. The **Work between** constraint is not supported in the evaluation version of Taskline

To place a task rigidly, use a **Start On** constraint or a **Finish On** constraint with both a date and a time. Because such a task cannot be moved, they usually result in other tasks being split to work around the fixed task. Using these two **constraints** with just a date, and no time, gives Taskline some flexibility in scheduling and generally results in a less fragmented schedule.

Taskline also supports 4 types of **constraints** that don't require a date:

- **Due today** to ensure that task finishes today
- **Due tomorrow** to ensure that the task finishes on or before tomorrow
- **Due last day of week** to ensure that the task finishes on or before the end of the week. The last day of the week is the day before the **First day of week**, which you set in the **Calendar** section of the **Outlook Options** settings dialog.
- **Due last day of month** to make sure that the task finishes on or before the end of the month

### Tips

- **Task constraints** will override the normal task ordering, but only if this is necessary for the constraint to be met
- If the task reschedule is producing results that are difficult to understand, you can use the **Understanding Taskline** section of the **Advanced Options** dialog to tell Taskline to temporarily ignore **task constraints**. [How?](#) This should simplify the process and help you understand how results are derived
- **Task constraints** should be the exception, not the norm. Most of your tasks should be unconstrained and only those with deadlines or other external date issues should have **constraints**. If you place **constraints** on most of your tasks, then you are

effectively manually scheduling and therefore stopping Taskline from working effectively

### Missed Constraints

It is not guaranteed that **constraints** will be met – there are some circumstances when they might not be:

- Two or more tasks have conflicting **constraints**. For example, several tasks might have **Start on** or **Finish on constraints** for exactly the same day. If the sum of the **Total Work** for those tasks exceeds the amount of working time available on that day, then it is probably going to be impossible to satisfy all of those **constraints**
- You have placed the **constraint** on a day with no working time available. For example, you work Monday to Friday and have set a **Start on** constraint on a Sunday. Or the **constraint** is for a working day, but your Outlook calendar is full of appointments that day
- The **constraint** is attempting to place the task before the **First task start at** date

When a constraint can't be met, Taskline warns you in several ways:

- You get an alert when Taskline has finished updating your tasks. This lists any problems, although if there are a lot of them, only the first few task subjects are displayed
- The **Missed Constraint** task field, which is normally zero, is set to the elapsed gap between the scheduled date and the **Constraint Date**. This enables you to create an Outlook view highlighting tasks that need attention, optionally sorted into an order showing which tasks have missed their **constraints** by the greatest amounts
- If you are using one of Taskline's built-in Outlook views – "Taskline A1" or "Taskline Nat Ord" – overdue tasks are highlighted in red. However, you can also use Outlook's **Conditional Formatting** feature to have your own views highlight tasks with missed **constraints**. [How?](#)
- Taskline can also prefix the subject of a task that misses its constraint with some warning text. By default, this text is "!! ", but you can change it to anything you want. To do this, start Taskline and click the **Options** tab. Then change the **If a task constraint is missed, prefix task subject with** box to your preferred warning prefix. The text will automatically be removed once the constraint problem has been resolved

### Recurring Tasks

Recurring tasks have implied **constraints** which position such tasks on the date of their recurrence. By default, if a recurring task has an Outlook **Start** date, then this acts like a **Start on or after** constraint. But if a recurring task has a **Due** date and no **Start** date, then that task is scheduled as if it has a **Finish on** constraint. This default way of scheduling recurring tasks can be changed using the options in the **Recurring tasks** section of the **Advanced Options** dialog. [More](#)

A missed recurrence date will also result in Taskline issuing a missed constraint alert.

### Regenerating Tasks

Milder warnings are issued for regenerating tasks that miss their recurrence date. These warnings will go away if the **Taskline should set Start and Due to the Scheduled dates** option is set. Furthermore, regenerating tasks that miss their dates will not mark the task as requiring attention. This is because regenerating tasks generally represent something that needs doing repeatedly, but not on specific dates.



Regenerating tasks are a specific type of recurring task.

### Entering constraints on Outlook's Task Table View

You can also enter task **constraints** in Outlook's table view, if you have added the **Constraint** and **Constraint Date** columns to your view (see [Adding New Columns](#) for information on how to do this). Just type the name of the constraint, for example **Finish on**, in the constraint column for the appropriate task. To reduce typing, the constraint abbreviations "**SO**", "**SOOA**", "**FO**", "**FOOB**" and "**WB**" can also be used. These stand for **Start On**, **Start on or after**, **Finish On**, **Finish on or before** and **Work between** respectively.

To remove a constraint, select the blank entry from the **External constraint** drop down list on the task form, or delete the constraint description on the **task table view**. You cannot add a constraint to a recurring task, since Taskline places recurring tasks on their **Start** or **Due** date, as appropriate.

### Constraints Which Affect a Sequence of Several Tasks

By default, a constraint only affects the task with the constraint on. However, sometimes this is not what is required. For example, you may have a deadline to meet, which involves completing a sequence of several related tasks, not just one task. To do this for a **Finish On** or **Finish on or before** constraint, click on the **Select any other tasks also affected by this constraint** check box and select the tasks from the list that you want to finish immediately before the current task. Similarly, for tasks with **Start On** or **Start on or after constraints**, select the tasks that you would like to start immediately after the current task. To **deselect** a task, simply click on it again.

The following types of tasks cannot be made dependent upon other tasks and hence will not be displayed in the **Select any other tasks also affected by this constraint** list:

- **Completed** tasks
- **Recurring** tasks, because these are already constrained to happen on a certain day and you can't have two **constraints** on one task
- **Delegated** tasks, because someone else is doing them
- Tasks with their **Status** set to **Deferred** or **Waiting on someone else**, because these are effectively on hold and hence Taskline ignores them
- Tasks with the **Ignore** check box checked. These are, by definition, ignored by Taskline
- Tasks with **Constraints**, again because you can't have two **constraints** on one task
- **Folder Tasks**

### Related Topics

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[Conditional Formatting in Outlook Views](#)

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## Using Different Working Hours for Different Tasks

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This feature is supported in Taskline Professional Edition only.

Taskline Professional Edition allows you to define several different sets of **Working Hours**. This allows some powerful time planning scenarios, some examples of which are discussed below.

### Work and Personal Tasks

Probably the most obvious use is for scheduling work tasks during work time and personal tasks during personal time. In this case you would set up 2 sets of **Working Hours**, perhaps called "Office Hours" and "Personal Task Time". [How?](#) You then assign these **Working Hours** to each task, as appropriate. [How?](#)

### Getting Work Done During Commute Time

If you have a regular commute to and from work, it may be that certain types of work can be carried out during this journey. For example, if you commute on the train, you may wish to read reports during this time. To schedule tasks specifically during your commute time, create a set of **Working Hours** to represent this time and assign these hours to the tasks in question. [How?](#) You may also have some tasks that could be done during commute time, or could be done during normal work time, it doesn't matter. In this latter case, create a set of **Working Hours** that encompasses both your normal work day and your commute time, and assign these hours to such tasks. For example, if you work from 9am to 5pm and commute from 8 am to 9am and 5pm to 6pm, you would create a set of **Working Hours** from 8am to 6pm.

### Getting Low Priority Tasks Done

Low priority tasks are usually at the tail end of your task list and are generally the last things to get done. However, there is a danger that they'll never get done, because higher priority tasks keep getting inserted above them. To make sure these tasks do get worked on, you may wish to devote some time specifically to low priority tasks. For example, the last 2 hours on Friday afternoon. To do this:

1. Create a set of **Working Hours** for just 2 hours on Friday (or whatever times you choose). [How?](#)
2. Assign these hours to the low priority tasks. [How?](#)
3. Make sure your **Working Hours** used for the other tasks also include the same 2 hours on Friday, since we still want to use this time even when there are no low priority tasks to do.
4. Set Outlook's standard **Priority** (Importance) setting on these tasks to **Low**.
5. On the **Tasks** tab of Taskline's Settings dialog, set the first **Order by** to **Priority (Low/Medium/High) Descending**. This will schedule the low priority tasks first. This may seem counter intuitive, but it will ensure that the low priority tasks use up the Friday afternoon slots first. Once there are no remaining low priority tasks, the remaining (higher priority) tasks will be scheduled into these slots instead.

### Working Out of Hours

You may have a need to work on certain tasks at odd hours, for example working late one night to get something finished. You can force a task to start or end at any time you wish by placing a **Start on** or **Finish on Constraint** on the task and then assigning the standard "24/7" **Working Hours**, which are set up to allow working 24 hours per day, 7

days per week.


### Dividing Your Time – Working in Several Locations or on Several Projects

You may work at different offices and only certain tasks can be done at certain offices. Or you may work on several projects at once and wish to divide your time equally between them. Creating **Working Hours** specific to each office or project will allow you to address this requirement in a simple and flexible way.

### Spreading a Long Task Out Over Several Days

Taskline currently allocates time for all of a task before moving on to the next one. This is usually the most productive way of working. However, there may be times when you want to spread a long task out over several days, for example working 2 hours per day on it. You can address this requirement by creating a set of **Working Hours** for 2 hour each day, and assigning these to the task.


#### Tip

-  The **Max time per day** and **Max time per week** settings offer a better way to spread a long task out over time, if you don't mind which time slots allocated. [More](#).

### Modeling Recurring Tasks

If, for example, you had a task that recurred every Monday for 1 hour each morning, you could use the same technique described in the previous section to represent this. Specifically in this case, you'd create a 10 hour task and assign to it **Working Hours** that were restricted to 1 hour on Monday morning.

#### Tip

-  In the same way, you can also use the **Max time per day** and **Max time per week** settings to represent recurring tasks. [More](#).

### Accounting for Logistical Considerations

You may need to take into account certain task restrictions or preferences when scheduling your work. For example, certain tasks may need a piece of equipment that you only have occasional access to. Or perhaps some tasks can only be done when a colleague is also in the office. Or you may simply wish to group together similar tasks, for example you may like to reply to emails first thing in the morning. Again, **Working Hours** can be used to address all of these requirements.

#### Related Topics

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[Setting Your Working hours](#)

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[The Taskline Task Form in Outlook](#)

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#### Related Topics

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[Setting Your Working hours](#)

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[The Taskline Task Form in Outlook](#)

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## Delegating Tasks

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Outlook has a system of task delegation, whereby a task can be delegated to another person. You delegate a task by clicking on the **Assign Task** toolbar button on the task form. Thus one person's task list could consist of tasks they have entered themselves, tasks delegated to them by others, and tasks they have delegated to others.

Delegation is an Outlook feature. Please consult the Outlook documentation for information on how to use it.

You can delegate Taskline tasks in the same way that you can delegate standard Outlook tasks. If the recipient has Taskline, they will see Taskline tasks, otherwise they will see a standard Outlook task.

When scheduling your tasks, Taskline ignores tasks that have been delegated to others, as someone else is carrying them out for you.

### Important

- There is an issue with Outlook in that delegated tasks lose all the values in User Defined Fields. This impacts delegating Taskline tasks as Taskline's custom fields, such as **Scheduled Start** and **Priority (A1)**, are lost when a Taskline task is delegated


## Preparation and Travel Time on Appointments

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You can tell Taskline to leave time before and after an appointment free of scheduled tasks, for example for traveling time to and from meetings.


You can define a default traveling time for all appointments on the **Calendar** tab of the Taskline Settings dialog. You can then enter a value in the **Before** and the **After** boxes. This is the amount of time in minutes or hours that you want Taskline to allow before and after an appointment on the Outlook Calendar.

For example, you might need 15 minutes to travel to most of your appointments on your Calendar, including your off-site meeting at 2:30. So you enter "15 m" in the box. As a result, Taskline schedules your work to end at 2:15 PM, 15 minutes before your 2:30 meeting. This gives you enough time between the end of the task and the beginning of the meeting to leave your office and get to the meeting on time.

 You should remember that the settings for an individual appointment override this default setting, when you enter special tokens in the **Subject** box of the appointment.

### Overriding the Default Times Before and After an Appointment

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 Taskline Professional Edition allows you to override the default appointment allowance times for individual appointments. To do this, place the following text, with the times adjusted accordingly, anywhere in the appointment **Subject** box:

#### Note

- Spaces are optional.
- If the time unit is omitted, minutes are assumed.

{30 m / 1 h}	30 minutes before the appointment and 1 hour after
{/ 1 h}	Use the default time before the appointment and 1 hour after it
{1 h /}	Use the default time after the appointment and 1 hour before it
{30 m}	30 minutes before and after an appointment

Example appointment subject: "Strategy meeting at head office {1.5h}". This tells Taskline to leave 1.5 hours free before and after the appointment.

#### Related Topics


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[Calendar tab](#)

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## Setting Start and Due Dates for Tasks

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1. Click  **Settings** in Outlook to start Taskline and display the Taskline Settings dialog.
2. On the **Options** tab, do one of the following:
  - Select the **Taskline should set Start and Due to the Scheduled dates** check box. This action ensures that Taskline updates the **Start** date and **Due** date boxes on the **Task** tab when you open the task, as well as the **Scheduled Start** and **Scheduled End** dates on the **Taskline** tab. Keeping these dates updated can be useful under the following circumstances:
    - You want these dates to be as up-to-date as possible.
    - You have existing standard views that display **Start** date and/or **Due** date.
    - Outlook uses **Start date** and **Due date** by default in certain views, such as the **Task Timeline** view, the **Next Seven Days** view and the **Overdue Tasks** view. If you use these views, you should set options so that Taskline updates the **Start** date and **Due** date each time you click the Taskline button on the toolbar.
  - Clear the check box if you want only the **Scheduled Start** and **Scheduled End** dates modified. Not updating **Start** date and **Due** date can be preferable under the following circumstances:
    - You want to leave your original date estimates in the **Start** date and **Due** date fields unchanged, so that you can later compare how you actually got on with how you initially thought you would get on.
    - Outlook regards uncompleted tasks with a **Due** date in the past as being overdue, and these are shown in red by default, which can be useful. If you want to take advantage of this feature, have Taskline update **Start** and **Due** dates initially, and then turn this updating off once you are happy with your schedule. **Start** and **Due** dates then stay unchanged and tasks that get behind schedule are shown in red. If you subsequently get swamped out with too much red, you can always have Taskline update the **Start** and **Due** dates again, to give yourself a fresh start.
  - Click **Restore My Original Dates** to reapply the dates you had before you ran Taskline.

### Tip

- For more information about options and settings, click the Question Mark button ? at the top right hand corner of the dialog, then click on the specific settings you want to know more about.

### Related Topics

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[Options for Start and Due Dates](#)

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[Defining the Order in Which Tasks are Scheduled](#)

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[Task Constraints](#)

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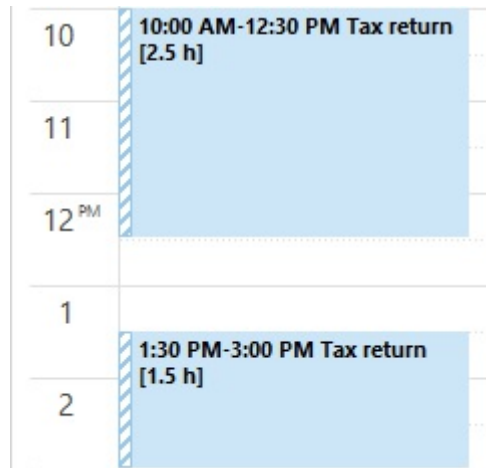
[Predefined Outlook Views](#)

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## Splitting Tasks During Scheduling

When Taskline schedules your tasks, the software places the tasks into available time slots. If a task requires more time than a time slot has available, Taskline splits the task into shorter parts. For example, the following 4 hour "Tax return" task gets split, with some work scheduled before lunch and some after lunch:



Usually, the default way that Taskline splits tasks is sufficient. However, sometimes you may want more control:

- For some tasks, you might want to specify the minimum length of time for each part of the task
- Occasionally, you might want to schedule an entire task into one time slot, without dividing the task into shorter parts. In this case, you need to completely turn off task splitting for that specific task

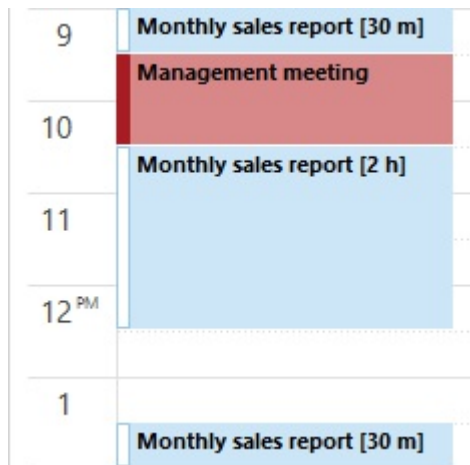
You can set a default minimum number of hours or minutes for all split tasks by opening Taskline [Settings](#) and then selecting the **Options** tab. You can enter a value in the **Default minimum task split** box. Now, when Taskline schedules a task and encounters conflicting items, the software splits the task into parts no shorter than the value you entered.

To allow Taskline to split a task, the **Task can be split** check box, on the [Taskline tab](#) of the task form in Outlook, must be selected. This check box is selected by default when you create a new task. But, if you want to completely prevent Taskline from splitting a specific task, open the task and clear the **Task can be split** check box.

### Tips

- Specific tasks can also override the **Default minimum task split** setting. To do this, open the task in Outlook and enter a value in the **Minimum split** box on the [Taskline tab](#) of the **Taskline** form
- If the task reschedule is producing results that are difficult to understand, you can use the **Advanced Options** dialog to tell Taskline to temporarily ignore task split settings. [How?](#) This should simplify the process and help you understand how results are arrived at

For example, let's say that you start work at 9:00 AM and take lunch from 12:30 PM to 1:30 PM. You have a monthly sales report to write that will take you 3 hours. You also have a meeting at 9:30 AM for 1 hour. With Taskline's default task splitting settings, the monthly sales report task finishes at 2:00 PM, and gets split into 3 parts:



You then decide that you don't want to work on this task for less than 1 hour at a time, so you open the task and set the **Minimum split** to "1 h":

**Scheduling control**
☒ Schedule this task
 Show as:

☒ Task can be split
 Minimum split:

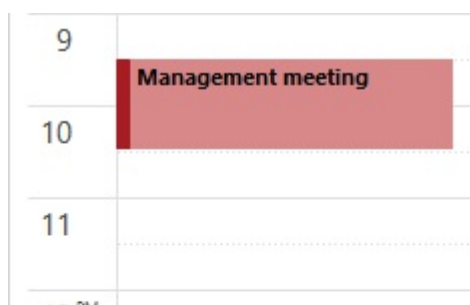
Project: 
Priority (A1):

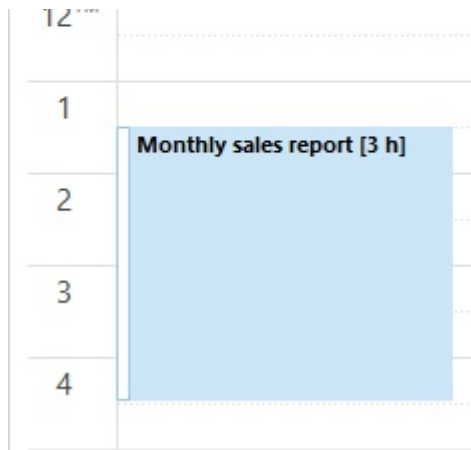
Working hours:

This change also means that the task finishes somewhat later now, at 2:30 PM:



You further decide that you would rather work on this task without interruption, so you open the task and clear the **Task can be split** check box. The task now finishes at 4:30 PM:





### Note

- Note how this results in a less optimal schedule, with tasks getting completed later and available time not being fully utilized. Consequently, restricting task splitting should only be done sparingly. However, in a schedule with many tasks, other tasks could fill the unused time slots, assuming that their own task splitting settings allowed this.

### Related Topics



[Recurring Tasks and Working on a Task for Only Part of the Day or Week](#)

[Taskline Settings Dialog](#)

[Taskline Form](#)

## Recurring Tasks and Working on a Task for Only Part of the Day or Week



These features are only available with Taskline Professional Edition.

Sometimes you may wish to:

- Spread a long task out over several days or weeks, working on it for maybe just a few hours a day
- Work on several tasks at once, dividing your time between them
- Repeat a task, for example you might wish to spend 30 minutes reading an industry journal every Friday

You do these things by using the **Max time per day** and **Max time per week** settings. These are in the **Scheduling control** section of the Taskline task form in Outlook. For example, let's say that you work 8 hours a day, 5 days a week and that you have a 16 hour task to complete:

- With both **Max time per day** and **Max time per week** unset, the task will get scheduled for 2 contiguous days. **Note:** Like all the examples here, this assumes that no other appointments or higher priority tasks influence the scheduling
- Let's say that the task is boring and you only fancy doing a bit each day. If you set **Max time per day** to 2 hours, the task will now get scheduled over 8 working days, 2 hours each day
- Let's assume that the task is a report that you want to spread out over 4 weeks, writing it as the information you require gradually comes in. Set **Max time per week** to 4 hours to achieve this

### Note

- Neither **Max time per day** nor **Max time per week** are supported in the evaluation version of Taskline

### Tips

- You can set both **Max time per day** and **Max time per week** on the same task. This gives you a great deal of flexibility as to how longer tasks are scheduled
- **Max time per day**, **Max time per week**, **Minimum split** and task constraints can all interact during task scheduling and as a consequence it can sometimes be difficult to understand why Taskline has scheduled tasks in the way it has. To simplify matters, and help you understand the results of a reschedule, Taskline has options to switch off certain task settings, such as **Minimum split**. These are in the [Understanding Taskline](#) section of the [Advanced Options](#) dialog

### Recurring Tasks

If you have a task you wish to do repeatedly, you can use the **Max time per day** or **Max time per week** settings to represent this. For example, if you wish to spend 1 hour a week catching up on email newsletters, you could set up a 12 hour task and set **Max time per week** to 1 hour. This would of course stop after 12 weeks, so you might wish to change this number, or create a new task after 12 weeks, as appropriate. If you only wanted to do this reading on a Friday, you could assign the task **Working Hours** that only had working time on a Friday. This would still allow Taskline the flexibility to schedule that work any time on Friday, fitting in with your other work. But if you specifically wanted to do this reading between say 4pm and 5pm, or you wanted a task with a more complicated recurring pattern, you would be better off creating a recurring appointment instead.

You can also create a recurring task in Outlook. However, in this case Taskline will only schedule the next occurrence of that task.

#### **Related Topics**

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[Task Form](#)

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[Recurring Tasks](#)

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[Splitting Tasks During Scheduling](#)

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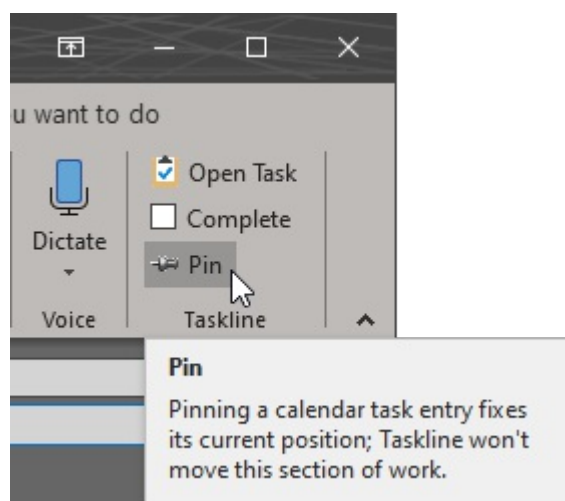
## Manually Overriding Some or all of Taskline's Scheduling

---

You may wish to use Taskline to automatically schedule your tasks but then perhaps make some manual adjustments to the resultant schedule. This could for example be because parts of a task can only be worked on while someone else is with you, or to work on parts of a task outside normal working hours, or simply personal preference.

You handle these cases by simply dragging a **calendar task entry** in Outlook's calendar to a new time slot, or dragging its start or end time, or both. When you manually edit a **calendar task entry** in this way, it becomes *pinned*. Normally, **calendar task entries** get deleted and recreated each time Taskline runs. However, this does not happen to pinned entries – they stay put and survive a Taskline reschedule.

You can also pin a **calendar task entry** without changing it. Open the item and click the **Pin** button in the **Taskline** section of the **Appointment** ribbon. The **calendar task entry** will then stay put during subsequent task reschedules:



To unpin a **calendar task entry**, open the item and click the **Pinned** button in the **Appointment** ribbon.

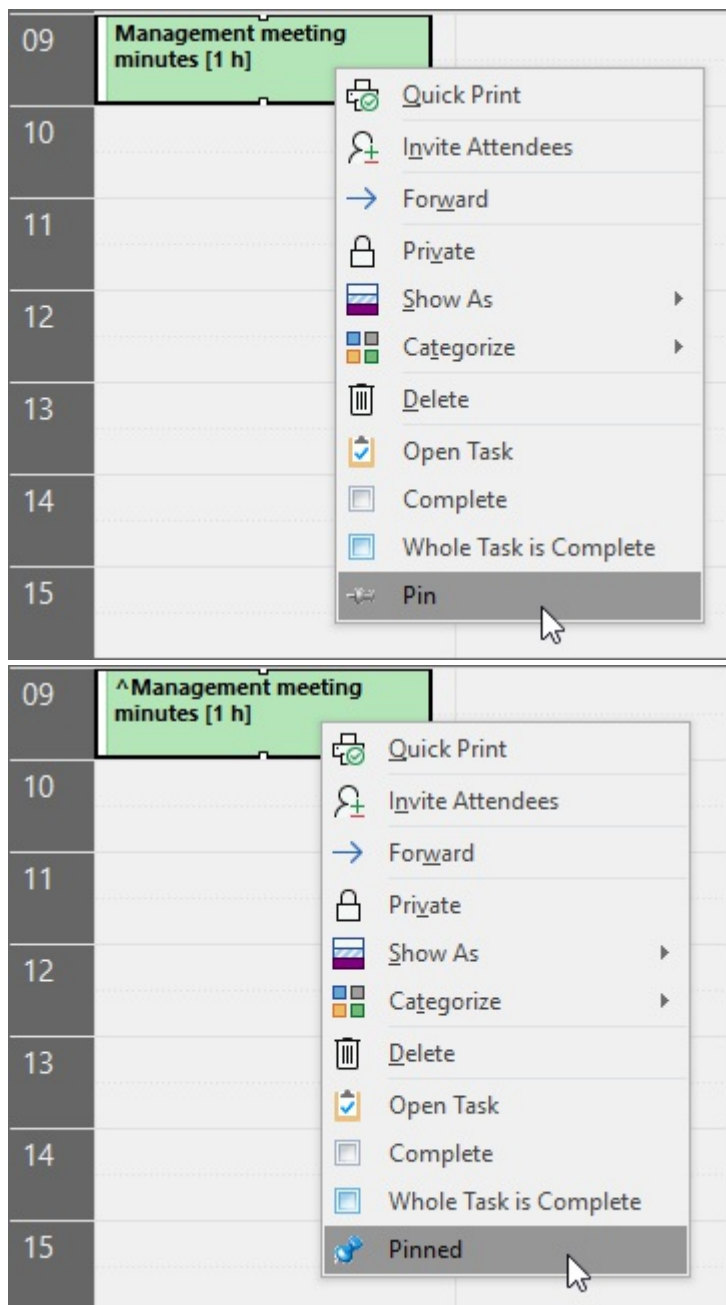
Pinned **calendar task entries** have their subjects' prefixed with a ^ character so you can tell at a glance which entries have been pinned.

### Note

- Pinned **calendar task entries** that are Not Started and have an **End** date on or before the **First task starts at** date (i.e. those pinned items that are in the past) are automatically unpinned and rescheduled when you reschedule your tasks.

### Tips

- You can also pin and unpin items by right clicking a **calendar task entry** in Outlook's calendar and selecting **Pin** or **Pinned** as appropriate from the popup menu. This is usually quicker as there's no need to open the item first:



- You can pin or unpin several tasks at once by selecting several calendar task entries and right clicking any one of them. The clicked menu option will then apply to all selected **calendar task entries**
- You can have pinned and unpinned items display in different colors [How?](#)

#### Related Topics

[Showing Your Tasks in the Outlook Calendar](#)



## Reminders

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Outlook tasks and appointments can issue reminders before they are due to start. This can be an excellent memory jogger.

Taskline tasks introduce their own reminder system, so with tasks you have 2 choices; you can use either the standard Outlook reminder, or you can use Taskline's reminder facility. However, you cannot use both at the same time on the same task, because the Taskline reminder works by setting up the Outlook reminder for you.

### Outlook Task Reminders

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Open the task form for a task. On the **Task** tab you will see the **Reminder** check box. If you check this, Outlook will issue you a reminder at the date and time you specify.

### Taskline Task Reminders

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The standard Outlook reminders ask you to specify the exact date and time of the reminder. However, it is difficult to set a reminder time because you will not know when the task is due to start until it has been scheduled by Taskline, and even then it may change if you run Taskline again in response to a change in circumstances. Taskline task reminders address this issue by allowing you to set the reminder to an amount of time before the task is scheduled to start.

To set a Taskline reminder, go to the **Taskline** tab of the task form. At the bottom of the form, check the **Reminder** check box, and then enter the amount of notice you require before the task is scheduled to start. Note that the time entered is working time, not elapsed time. This means that non-working time (i.e. time when you are not at work or are on a break) is ignored when deciding when the reminder should be issued. For example, consider a task scheduled to start at 2pm on a working day that has a lunch break from 1pm to 2pm. If the task has a 30 minute reminder, that reminder will be issued at 12:30pm, rather than at 1:30pm when you're probably not there. If lunch was from 12pm to 1pm, then in this case working time and elapsed time are the same – the reminder would be issued at 1:30pm.

Taskline reminders work by setting up the standard Outlook reminder on your behalf. Thus you can't use both types of reminder on the same task at the same time.

If you set the Taskline reminder, you must clear the Taskline reminder to remove it. Clearing the standard Outlook reminder will not work, because it will just get set up again the next time you run Taskline.

When you clear the Taskline reminder, this clears the standard Outlook reminder as well.

## Recurring Tasks


---

Taskline will schedule the next occurrence of a recurring task. By default, Taskline will attempt to place a recurring task on its **Start** date, or its **Due** date if no **Start** date is set. However, this behavior can be changed by setting the **Recurring tasks** options on the [Advanced Options](#) dialog.

You need to make sure that you mark recurring tasks as **Complete** as and when you finish each occurrence. Failing to do so will leave the task's **Start** and/or **Due** dates in the past, as only when a task is marked as **Complete** will Outlook generate a new task occurrence, with updated **Start** and **Due** dates

Note that the **Start** and **Due** dates of recurring tasks are never updated by Taskline, even if you have the **Taskline should set Start and Due to the Scheduled dates** option set. This is because changing the **Start** or **Due** date of a recurring task usually generates a new (and unwanted) task occurrence. However, Taskline can update the **Start** and **Due** dates of regenerating tasks, which are a specific type of recurring task. They generally represent something that needs doing repeatedly, but not on specific dates. For this reason, regenerating tasks that miss their dates will not mark the task as requiring attention.

### Tips

- If you need *all* occurrences of a recurring task to be scheduled, we suggest you use a recurring appointment instead. The effect is quite similar.
-  You can also use the **Max time per day** or **Max time per week** settings to represent recurring tasks. [How?](#)

## Tasks Waiting on Someone Else

---

Tasks that have their **Status** set to **Waiting on someone else** will not be scheduled by Taskline and will have their **Scheduled Start**, **Scheduled End** and **Week Commencing** fields cleared.

However, you can have Taskline create a **calendar task entry** (as an **All day event**) for tasks set to **Waiting on someone else** so that you get appropriate reminders for such tasks that are visible in Outlook's calendar. To do this, simply add a **Start** and/or **Due** date and select the **Schedule this task** check box:

- If the task has neither a **Start** nor a due **Due** date, then no **All day event** will be displayed
- If the task has a **Start** *or* a **Due** date, the **All day event** will be displayed on that date
- If the task has both a **Start** *and* a **Due** date, an **All day event** will be displayed from the **Start** to the **Due** date

## Private Tasks

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**Private** tasks are scheduled as normal by Taskline. However, **Private** tasks create private **calendar task entries**.

### Related Topics

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#### [Recurring Appointments](#)

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 [Recurring Tasks and Working on a Task for Only Part of the Day or Week](#)



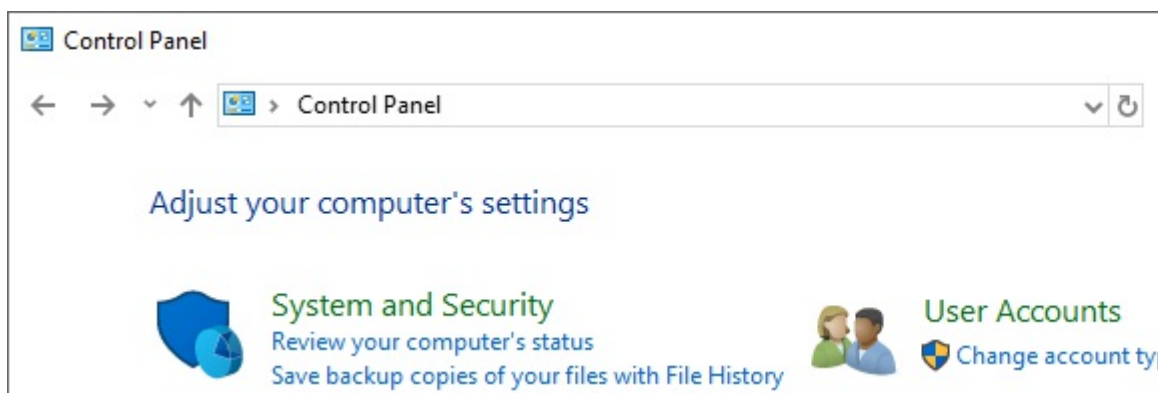
## Automated Background Task Scheduling

The Taskline command line option **/NoDialog** allows you to run Taskline in the background using the Windows task scheduler. When Taskline runs in the background, you will not have the opportunity to change any Taskline settings, so you must make sure that the current settings are appropriate. In particular, running in the background will usually require that the **Default to current date and time** option, on the **Tasks** of the Taskline Settings dialog, is enabled, so that tasks are always scheduled from time now. To change settings, open the Taskline Settings dialog normally, make any required changes, and then click **Apply** to save your changes and **Cancel** to close the dialog without running Taskline.

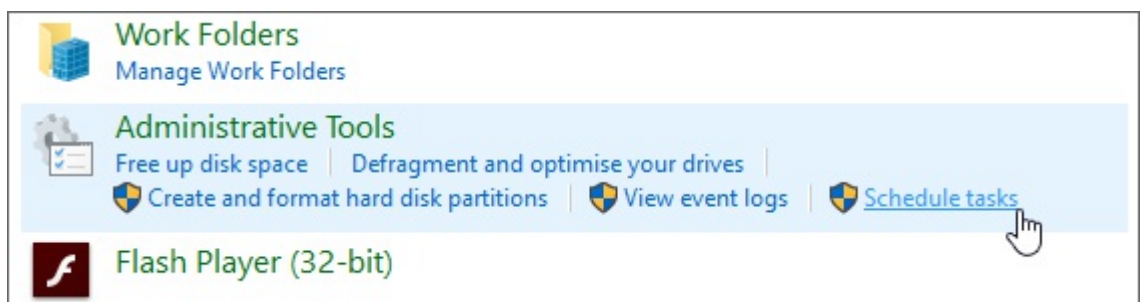
Now, set up a schedule for running Taskline using the Windows Task Scheduler:

### Instructions for Windows 10, Windows 8.1, Windows 8 and Windows 7

1. Open Windows **Control Panel** and view it by **Category**:



2. Click **System and Security** then, in the **Administrative Tools** section, click **Schedule tasks**. Note: this refers to running Windows applications, not scheduling Taskline tasks!



3. In the new **Administrative Tools** window that opens up, double click **Task Scheduler**
4. In the **Task Scheduler** window, click **Action** menu → **Create Basic Task**. The **Create Basic Task Wizard** will appear
5. In the **Name** box, type "Taskline". Click **Next**
6. On the **Task Trigger** page, choose when you'd like to schedule your tasks, for example **Daily**. Click **Next**
7. Choose the appropriate start time and date settings and then click **Next**
8. On the **Action** page, click **Start a program**. Click **Next**
9. On the **Start a Program** page:
  - i. Click the **Browse...** button next to the **Program/Script** box

- ii. Locate your Taskline install folder. By default this is:
  - 32-bit versions of Windows: C:\Program Files\ResultsWare\Taskline
  - 64-bit versions of Windows: C:\Program Files (x86)\ResultsWare\Taskline
- iii. Select the Taskline.exe file and click the **Open** button
- iv. Enter "/NoDialog" (without the double quotes) in the **Add arguments** box
- v. Click **Next**.
- vi. Click **Finish**

### **Important**

- The **/NoDialog** option has the following effects:
  - It runs Taskline immediately, rather than display the Settings dialog
  - It does not display the progress box
  - It does not display the **Task Schedule Report**, even if the **Display Task Schedule Report when Taskline has finished** check box is selected
  - An alert is not displayed if tasks constraints can't be met. As such, you will need to ensure that you have told Taskline to highlight the subject of any task with a missed constraint [How?](#)

Although an alert is not displayed if tasks constraints can't be met, other alerts are still displayed if unexpected errors arise during scheduling

- If you have to enter a password when you start Outlook, then background scheduling will only work if Outlook is already running. Otherwise, when Taskline starts up Outlook, it will stay inactive, waiting for someone to enter the Outlook password

# Task Hierarchy


## Hierarchy Introduction

Taskline works with Microsoft Outlook Folders to support a full task hierarchy. You can Create **Folder Tasks**, which enable a task to be broken down further into sub-tasks. Each sub-task may itself be a **Folder Task**, and so on. **Folder Tasks** are like Summary Tasks in Project Management software and are similar to folders in the Windows file system.

## Outlook Folder Pane

When working with a Task Hierarchy, it's best to have the Outlook **Folder Pane** displayed, so that you can see and navigate the hierarchy. [How to display the Folder Pane](#).

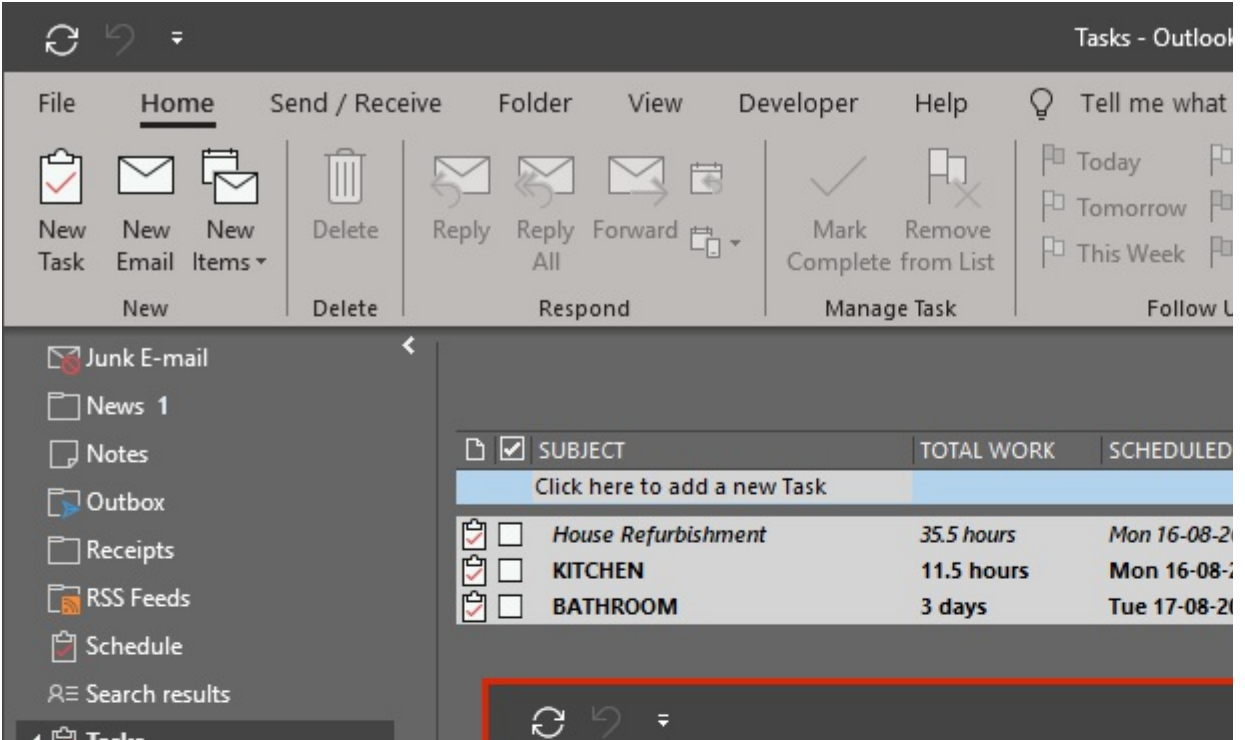
## Telling Taskline to Use Subfolders

Click the  [Settings](#) button to display the Taskline Settings dialog. On the **Tasks** tab, select the **Include subfolders** check box. Click **Apply** to save this change.

When the **Include subfolders** check box is selected, Taskline will schedule the tasks in the selected **Schedule tasks in** Outlook folder, and all tasks in all subfolders too. If this check box is not selected, only tasks in the top-level nominated tasks folder are scheduled.

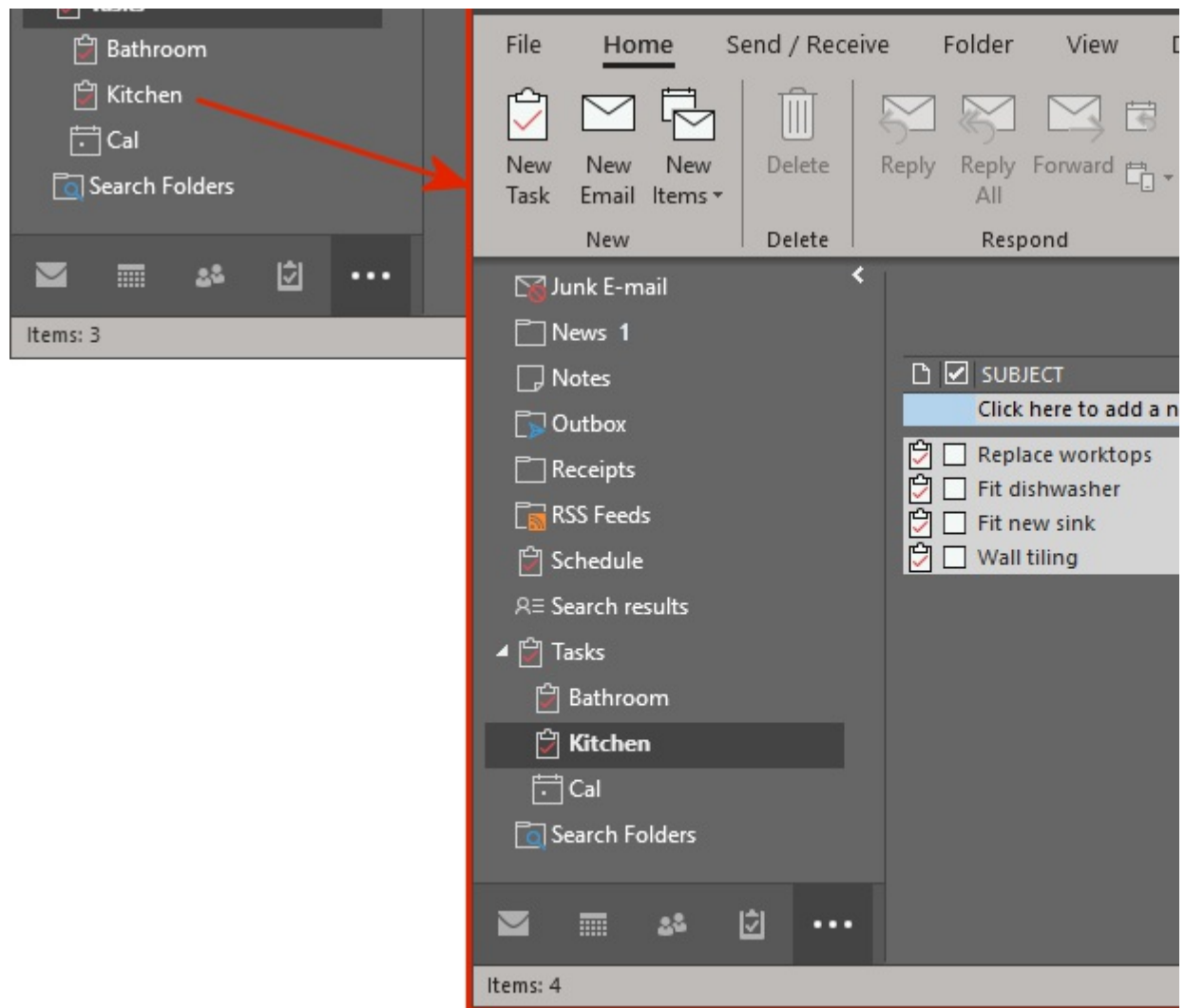
## Folder Tasks

For each task folder, Taskline will maintain a **Folder Task**. A **Folder Task** is a one task summary of that branch of the task hierarchy – i.e. a summary of all the tasks beneath it. For example, its **Total Work** will be the sum of the **Total Work** of all tasks in that branch of the hierarchy, its **Scheduled Start** will be the **Scheduled Start** date of the earliest task in the branch, its **Scheduled End** the **Scheduled End** of the task finishing last in the branch, and so on.



The screenshot shows the Outlook 'Tasks - Outlook' window. The ribbon includes 'File', 'Home', 'Send / Receive', 'Folder', 'View', 'Developer', 'Help', and 'Tell me what'. The 'Home' tab is active, showing icons for 'New Task', 'New Email', 'New Items', 'Delete', 'Reply', 'Reply All', 'Forward', 'Mark Complete', 'Remove from List', and 'Follow Up'. The left sidebar shows the folder pane with 'Junk E-mail', 'News 1', 'Notes', 'Outbox', 'Receipts', 'RSS Feeds', 'Schedule', and 'Search results'. The main pane displays a task list with columns for 'SUBJECT', 'TOTAL WORK', and 'SCHEDULED'. A blue bar at the top of the list says 'Click here to add a new Task'. Below it, three tasks are listed: 'House Refurbishment' (35.5 hours, Mon 16-08-21), 'KITCHEN' (11.5 hours, Mon 16-08-21), and 'BATHROOM' (3 days, Tue 17-08-21). A red box highlights the bottom of the task list.

SUBJECT	TOTAL WORK	SCHEDULED
Click here to add a new Task		
House Refurbishment	35.5 hours	Mon 16-08-21
KITCHEN	11.5 hours	Mon 16-08-21
BATHROOM	3 days	Tue 17-08-21



### Folder Task Restrictions

- **Folder Tasks** may not be recurring, nor may they have **Constraints** assigned
- You cannot add progress to a **Folder Task**, or make it **Complete** or **Not Started**, or set the **Total Work**. This is because Taskline itself sets these values on **Folder Tasks** when you reschedule, to summarize the state of each branch of the task hierarchy.

### Folder Task Roll-Ups

A **Folder Task** summarizes the following information for the branch:

<b>Total Work</b>	The sum of all the <b>Total Work</b> of all the tasks in the branch
<b>Actual Work</b>	The sum of all the <b>Actual Work</b>
<b>Work Remaining</b>	The sum of all the <b>Work Remaining</b>
<b>Scheduled Start</b>	The <b>Scheduled Start</b> date of the earliest task
<b>Scheduled End</b>	The <b>Scheduled End</b> of the last task
<b>Actual Start</b>	The earliest <b>Actual Start</b> date of all subtasks
<b>Start Date</b>	The earliest start date of all the tasks in the branch
<b>Due Date</b>	The latest end date
<b>Status</b>	This will be set to <b>Not Started</b> if all sub-tasks are <b>Not Started</b> , to

	<b>Completed</b> if all subtasks are <b>Completed</b> , or <b>In Progress</b> if there is a mixture of the two
<b>% Complete</b>	This is calculated as the total amount of completed work in the branch, divided by the sum of all <b>Total Work</b> values. Milestones (tasks with zero <b>Total Work</b> ) do not influence <b>% Complete</b> on <b>Folder Tasks</b> , unless all the tasks in the branch are milestones. In this case, <b>% Complete</b> is calculated as the percentage of milestones that are <b>Complete</b> .

## Default Values Inherited from Folder Tasks

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Some task values, if they are left unset on the task itself, are inherited from the parent **Folder Task** (or the **Folder Task**'s parent, if the **Folder Task** has the value unset, and so on, all the way up to the **Root Summary Task**). Specifically, the following values can be inherited:

- **Project**
- **Working hours**
- **Max time per day**
- **Max time per week**
- **Min split**
- **Show as (Free, Tentative etc)**

## Folders and Task Ordering

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**Folder Tasks** are also important because each one acts as a placeholder for all the tasks in its branch.

Task ordering, as defined in the **Schedule tasks in the following order** settings on the Taskline Settings dialog, works only within each folder. When Taskline finds a **Folder Task**, all the tasks in that branch are inserted at that point.

### Tip

If a **Folder Task**:

- Has **Schedule this task** deselected
- Or is set to **Deferred** or **Waiting on someone else**
- Or is not scheduled for any other reason (e.g. it has been assigned **Working Hours** that are not scheduled)

then that whole branch of the task hierarchy will not be scheduled.

## Creating a Task Hierarchy

---

You can work within Outlook's **Folder Pane**, or with Outlook tasks, or any combination of the two.

### Folder Pane

Simply create a new Outlook tasks folder in the normal way: right click on an existing folder to display the **Create New Folder** dialog, give the new folder a name and click **OK**. When you do this, Taskline will create a **Folder Task** too, with the same name as the folder, but in capital letters.



If you have your Outlook task list displayed in **Natural Order**, then the position initially assigned to the **Folder Task** in the task list may not be where you want. You can, at this point or at any point in the future, simply move the **Folder Task** to where you want it to be.

### Tip

- If you don't get a **Folder Task** created, check to see if the **Include subfolders** option is enabled.

### Task List

You may have an existing Taskline task that you wish to expand into more detail. You may have started with broad-brush planning – for example "Paint the house" – then later add tasks that represent smaller (and hence more predictable) work items – "Sand down existing paintwork", "Apply undercoat" etc.

To convert an existing Taskline task into a **Folder Task**, simply right click on the task and click the **Create Folder Task** command from the pop-up menu.

Taskline will:

- Change the subject of the **Folder Task** to be uppercase (to distinguish **Folder Tasks** from normal tasks more easily)
- Create a new Outlook folder of the same name as the **Folder Task**
- Open the new folder (so you will be presented with a new, empty folder)

### Tip

- You can change the name of a **Folder Task**, or the folder, without affecting the connection between the two.

## Using Taskline's Built-In Views to Visually Distinguishing Folder Tasks

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**Folder Tasks** display in Outlook's task table view along with other Taskline tasks. As such, it's useful to be able to see which tasks are normal tasks and which are **Folder Tasks**. Taskline comes with 2 built-in Outlook views that visually highlight **Folder Tasks**:

- **Folder Tasks** are shown in **bold**
- The **Root Summary Task** is shown in ***bold italic***
- Additionally, the built-in views highlight tasks that have missed their deadlines in **red**

To use these views, open your Taskline tasks folder and click **View** ribbon → **Change View**. Then choose "Taskline Nat Ord" if you are ordering your tasks by **Natural Order**, or "Taskline A1" if you are ordering your tasks by **Priority (A1)**. You can also use Outlook's **Conditional Formatting** feature to add **Folder Task** highlighting to your own Outlook views if you prefer. [How?](#)

## Navigating the Task Hierarchy

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To change task folder, you can use Outlook's **Folder Pane**. You can also navigate the task hierarchy using Taskline extensions to Outlook tasks.

### Folder Pane

Simply click the Outlook folder you want to view.

### [Task List](#)

Right click on the task and click the **Open Folder** command from the pop-up menu

### [Folders Containing Only Completed Tasks](#)

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Over time, the number of completed tasks you have will increase. There may be folders, or whole branches of the task hierarchy, that contain only completed tasks and hence require no scheduling. Processing these folders will slow Taskline down, so you may want to unset the **Schedule this task** check box on such **Folder Tasks**. However, don't do this if you still want the completed branches of the hierarchy included in the **Task Schedule Report**.

### [Root Summary Task](#)

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The **Root Summary Task** acts like a **Folder Task** for all the tasks and all the subfolders in your nominated **Schedule tasks in** folder. It gives you one task that summarizes everything. To enable this feature, select the **Create root summary task** check box on the **Options** tab of the Taskline Settings dialog.

The default name of the **Root Summary Task** is "Taskline Summary". However, you can change it to anything you want, for example "All My Work".

### **Related Topics**

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[Conditional Formatting in Outlook Views](#)


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[Summary of Task Schedule](#)

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## Taskline Settings Dialog

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You access the Taskline Settings dialog by clicking  [Settings](#) in Outlook. The Settings dialog displays several tabs: [Tasks](#), [Projects](#), [Calendar](#), [Working Hours](#), [Options](#) and [Help/About](#).

<b>?</b>	This button displays Help for an item on the Settings dialog. When you click the help button, the cursor will change to an arrow and a question mark. If you click one of the controls on the Settings dialog, a help window displays information on the control you just clicked.
<b>X</b>	This button closes the Settings dialog. It has the same effect as clicking <b>Cancel</b> .
<b>OK</b>	Click <b>OK</b> to save all of your changes and run Taskline.
<b>Cancel</b>	Click <b>Cancel</b> to throw away any changes and close the Settings dialog without running Taskline. <b>Cancel</b> does not lose any changes that have been previously saved by clicking <b>OK</b> or <b>Apply</b> .
<b>Apply</b>	Click <b>Apply</b> to save your changes. <b>Apply</b> does not run Taskline and the Settings dialog will stay on screen. Note that <b>Apply</b> only becomes available if unsaved changes exist.
<b>Help</b>	Click <b>Help</b> to display this help documentation. The Help topic for the current tab appears.

### Related Topics

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[Tasks Tab](#)

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[Projects Tab](#)

---

[Calendar Tab](#)

---

[Working hours Tab](#)

---

[Options Tab](#)

---

[Help/About Tab](#)

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## Tasks Tab

### First task starts at

**First task starts at** Enter the date and time that the first task in your task list should start. All other tasks will then follow on after that task. Note that a constraint on the first task, for example a **Start On** constraint, can override the **First task starts at** date.

The date and the time should be separated by a space.

You can also enter a date by clicking on the arrow to the right of the **First task starts at** box to display the calendar. You can then select a date by clicking on it with the mouse. [More](#).

**Default to current date and time** Click this option to have Taskline enter the current date and time for you in the **First task start at** box. If this is outside normal working hours, it is rounded up to the start of the next working period. For example, if you work 8am to 5pm Monday to Friday, and you click this option on a Saturday, Taskline enters 8am next Monday.

### Schedule tasks in the following order

**Order by, And then by** These drop down lists allow you to define the order in which your tasks are scheduled. **Natural Order** or **Priority (A1)** are common choices, but you can order by many other fields too, including Outlook custom fields [More](#). You can override this order with task constraints, such as a **Finish On** constraint. [More](#).

You can also choose whether to order your chosen task property into ascending or descending order. For example, ordering tasks by **Descending Total Work** schedules the longest tasks first.

### Schedule tasks in

**Folder...** Click the **Select** button to choose which Outlook **Tasks** folder Taskline should schedule. The text to the left of the **Select** button tells you which folder is currently selected.

### Task hierarchy

**Include subfolders** Select the **Include subfolders** check box to have Taskline schedule the tasks in the selected Outlook folder, and all tasks in all subfolders too. If this check box is not selected, only tasks in the top-level nominated tasks folder are scheduled.

**Create root summary task** Select this check box to have Taskline create a root summary task, which is a single task that summarizes the whole of your schedule. The default name of the root summary task is "Taskline Summary", but you can change it here by typing a new name into the box. [More about a Task Hierarchy](#)

### Completed tasks

**Move completed tasks to...** You can optionally have Taskline move completed tasks to a different Outlook folder. To enable this feature, click this option, and choose a suitable folder by clicking on the **Select** button. [More about task progress](#).

We do not recommend the use of this option. If you move completed tasks, then the final [Task Schedule Report](#) will not be able to show

	information on completed work. For example, the report will not be able to roll-up Work Done and hence you will not be able to compare Work Done with Work Remaining (although you will still be able to see this information for individual tasks).
<b>Delete completed occurrences of recurring tasks</b>	<p>Select this option to have Taskline always delete completed occurrences of recurring tasks, regardless of the <b>Move completed tasks to...</b> setting. Such tasks are moved to the Deleted Items folder, rather than being permanently deleted.</p> <p>We do not recommend the use of this option. If you delete completed recurring tasks, then the final <a href="#">Task Schedule Report</a> will not be able to show information on completed work. For example, the report will not be able to roll-up Work Done and hence you will not be able to compare Work Done with Work Remaining (although you will still be able to see this information for individual tasks).</p>

### Related Topics

<a href="#">Taskline Settings Dialog</a>
<a href="#">Projects Tab</a>
<a href="#">Calendar Tab</a>
<a href="#">Working hours Tab</a>
<a href="#">Options Tab</a>
<a href="#">Help / About Tab</a>

## Projects Tab

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Tasks can be assigned a **Project** using the [Taskline tab](#) of the task form in Outlook. [How?](#) This tab of the Taskline Settings dialog allows you to manage those projects.

<b>Project list box</b>	This is the list of current projects. You can click a <b>Project</b> to select it. Use Control+Click to select more than one <b>Project</b> , or Shift+Click to select a range of <b>Projects</b> .
<b>Move Up</b> <b>Move Down</b>	If, on the <b>Tasks</b> tab of the Settings dialog, you have chosen to <b>Order By Project</b> , then projects will be scheduled in the order shown in this list. Select one or more projects and use the <b>Move Up</b> and <b>Move Down</b> buttons to change this order.
<b>Delete</b>	You can select one or more <b>Projects</b> in the list and click <b>Delete</b> to remove them. You cannot delete projects that are current assigned to tasks.
<b>Insert New</b>	To create a new project, enter a unique name in the box to the left of the <b>Insert New</b> button and click the button. Alternatively, simply type in a new project name on the <a href="#">Taskline tab</a> of the task form in Outlook.
<b>Import Projects From Clipboard</b>	To import Projects, copy the Project names to the Windows clipboard, one per line of text, then click the <b>Import Projects From Clipboard</b> button to import.

### Related Topics

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[Using Projects](#)

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[Project and The Taskline Task Form in Outlook](#)

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[Taskline Settings Dialog](#)

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[Tasks Tab](#)

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[Calendar Tab](#)

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[Working hours Tab](#)

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## Calendar Tab

### Creating task entries in the calendar

<b>Create for tasks that are Not Started or In Progress</b>	Click this option to have Taskline create <b>calendar task entries</b> for tasks, or parts of tasks, that are still outstanding. Task entries enable you to see your tasks in Outlook's calendar view, as well as the task list.
<b>Keep a record of completed work</b>	Select this check box to have Taskline keep <b>calendar task entries</b> that have been marked as complete. This enables you to maintain a record in your calendar of exactly what you've worked on, and when. Deselect the check box if you are only interested in current and future work. In this case, Taskline will delete completed <b>calendar task entries</b> when it runs. <a href="#">More about task progress.</a>
<b>Create all day events for milestones</b>	Click this checkbox to have Taskline create an All-day event on the Outlook Calendar for each task that you designate as a milestone. You can designate a task as a milestone by entering 0 in the <b>Total Work</b> box on the <a href="#">Taskline tab</a> of the <b>Taskline</b> form. By default, tasks with zero <b>Total Work</b> are ignored by Taskline, so you must select the <b>Schedule this task</b> checkbox, on the same tab, to have Taskline process the task as a milestone.

### Options for task entries in the calendar

<b>Mark all as private</b>	This option affects who can see your <b>calendar task entries</b> when your Outlook Calendar is being shared. If this option is selected, all <b>calendar task entries</b> are created as private, so that only you can view them. If this option is not selected, only <b>calendar task entries</b> representing private tasks will be created as private.
<b>Limit tasks in calendar to first ... days</b>	You may not wish to have your calendar filled up with tasks for many days or weeks ahead. Sometimes, it helps to just focus on short term goals. This feature allows you to limit how many days in the calendar, after the <b>First task starts at</b> date, display scheduled tasks.
<b>Create as</b>	<p>Completed work is always represented using appointments on the calendar, if the option to create <b>calendar task entries</b> for completed work is enabled. However, outstanding work can be represented by appointments or all day events. You can choose from the following options:</p> <ul style="list-style-type: none"><li>▪ <b>Appointments, with accurate start and end dates and times</b> – The tasks display like appointments that begin and end with the <b>Scheduled Start</b> and <b>Scheduled End</b> dates that appear on the <b>Taskline</b> tab of the <b>Taskline</b> form.</li><li>▪ <b>All day events from task Scheduled Start to Scheduled End</b> – The tasks display as all-day events, in a continuous box beginning and ending with the <b>Scheduled Start</b> and <b>Scheduled End</b> dates that appear on the <a href="#">Taskline tab</a>. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears from Monday to Wednesday.</li><li>▪ <b>All day events on task Scheduled start date</b> – The tasks display as all-day events on the <b>Scheduled Start</b> date that</li></ul>

	<p>appears on the <b>Taskline</b> tab. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears on Monday only.</p> <ul style="list-style-type: none"> <li>▪ <b>All day events on task Scheduled End date</b> – The tasks display as all-day events on the <b>Scheduled End</b> date that appears on the <b>Taskline</b> tab of the form. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears on Wednesday only.</li> <li>▪ <b>All day events on task Scheduled start, unless Finish constraint</b> – The tasks display as all-day events on the <b>Scheduled Start</b> date, which is shown on the <b>Taskline</b> tab of the form. However, if the task has a <b>Finish on</b> or <b>Finish on or before</b> constraint, the All day event is placed on the task's <b>Scheduled End</b> date. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears on Monday, unless you have entered a Finish constraint. In that case, the all-day event is shown on Wednesday.</li> <li>▪ <b>All day events on task Scheduled End, unless Start constraint</b> – The tasks display as all-day events on the <b>Scheduled End</b> date, which is shown on the <b>Taskline</b> tab of the form. However, if the task has a <b>Start on</b> or <b>Start on or after</b> constraint, the All day event is placed on the task's <b>Scheduled Start</b> date. For example, if a task starts on Monday and ends on Wednesday, the all-day event appears on Wednesday, unless you have entered a Start constraint. In that case, the all-day event is shown on Monday.</li> </ul>
Default "Show As" for Not Started task entries	Use this drop down list to set the <b>Free/Busy</b> status of your <b>calendar task entries</b> in Outlook's calendar. This is a default value that can be overridden per task by using the <b>Show as</b> drop down list on the Taskline tab of the task form in Outlook.
"Show As" for Completed task entries	Sets the <b>Free/Busy</b> status of Completed <b>calendar task entries</b> in Outlook's calendar. Leave blank if you don't want to change the <b>Show As</b> value when a <b>calendar task entry</b> is set as Complete."
Define Subject	Click this button to display the <b>Calendar Task Entry Subject</b> dialog, which allows you to customize the appointment subject Taskline assigns to <b>calendar task entries</b> . <a href="#">More</a> .
Define Colors	Click this button to display the <b>Calendar Task Entry Colors</b> dialog. This allows you to set up various colors for the task entries that Taskline creates in Outlook's calendar. <a href="#">More</a> .
Default time allowances before and after an appointment	
Before	<p>Enter the amount of time in minutes or hours that you want Taskline to leave free before the start of an appointment on the Outlook Calendar. This is useful if you want to allow for travel or preparation time before an appointment. <a href="#">More</a>.  For Taskline Professional Edition only, this is treated as a default value and the settings for an individual appointment can override this setting. <a href="#">How?</a></p>
After	<p>Enter the amount of time in minutes or hours that you want Taskline to leave free after the end of an appointment. This is useful if you want to allow for travel time after an appointment. <a href="#">More</a>.  For Taskline Professional Edition only, this is treated as</p>



III—  
a default value and the settings for an individual appointment can override this setting. [How?](#)

## Folders

### My appointments are in...

Click the **Select** button to choose the folder that contains your appointments. Taskline will schedule your tasks around your appointments, so that the two don't overlap. The text to the left of the **Select** button tells you which folder is currently selected.

### And also in...

Taskline gives you the option of selecting a 2<sup>nd</sup> Calendar folder that also contains your appointments. For example, perhaps some of your appointments are in a work Calendar and some in a personal Calendar. You can enable or disable this 2<sup>nd</sup> folder by selecting or deselecting the check box.

### Write task entries to...

Click the **Select** button to choose the folder that is to contain your **calendar task entries**. This can be the same as your appointments folder, and the text to the left of the **Select** button tells you which folder is currently selected. **Calendar task entries** enable you to see your tasks in Outlook's Calendar view, as well as the task list. [More](#). If the **Select** button is disabled, click the **Create for tasks that are Not Started or In Progress** option, which is also on the **Calendar** tab of the dialog.

## Related Topics

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[Calendar Task Entry Colors](#)

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[Calendar Task Entry Subject](#)

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[Taskline Settings Dialog](#)

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[Tasks Tab](#)

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[Projects Tab](#)

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[Working Hours Tab](#)

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[Options Tab](#)




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[Help/About Tab](#)

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## Working Hours Tab



### Working Hours

 <b>Working hours</b>	Use this list to select the <b>Working Hours</b> you wish to view or edit. The <b>Working Hours</b> define the times during which tasks assigned these hours can be scheduled
 <b>New</b>	Click the <b>New</b> button to create a new set of <b>Working Hours</b>
 <b>Delete</b>	Click the <b>Delete</b> button to delete the currently selected <b>Working Hours</b> <ul style="list-style-type: none"><li>▪ You cannot delete <b>Working Hours</b> that are currently assigned to one or more tasks</li><li>▪ There must always be at least one set of <b>Working Hours</b> defined, so if you delete the last remaining set, Taskline will automatically insert a new set of hours called "Standard work week"</li></ul>
<b>Mon, Tue etc</b>	You use these check boxes when you want to make the same change to several days. Select the check boxes for the days you want to edit. Then, when you make a change, all the selected days will be changed simultaneously. Clicking the check box at the head of the column is a shortcut for selecting or deselecting all seven check boxes in one operation
<b>Start work</b>	Enter the time you are ready to start working on your tasks on this day. If you do not work this day, leave all the boxes on the row blank
<b>Stop work</b>	Enter the time you stop working on your tasks on this day. Use 0:00 for midnight. If you do not work this day, leave all the boxes on the row blank
<b>From</b>	If you take a regular break during the day, such as a lunch break, enter the time you start your break here
<b>To</b>	Enter the time you end your break here
<b>1st, 2nd etc break</b>	You can define up to 9 breaks during the day. Use these radio buttons to select which break you want to view or edit.

### Schedule tasks during these appointment types

<b>Free, Busy, Tentative etc</b>	Select one or more of these check boxes to have Taskline process (i.e. schedule tasks around) appointments with <b>Show time as</b> set to the name of the check box. Unchecked boxes will mean that Taskline ignores those types of appointments.
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### Options

 <b>Default hours</b>	If a task has no <b>Working Hours</b> assigned, the <b>Default hours</b> are used. You define which hours are the default ones by selecting this radio button
 <b>Schedule tasks that have been assigned these hours</b>	If you want Taskline to ignore (i.e. not schedule) all tasks assigned these <b>Working Hours</b> , deselect this check box

### Important

- You cannot predict all tasks in advance and hence you should make an allowance in your schedule for unpredictable or spontaneous events, such as phone calls, interruptions etc. Build some contingency (or slack time) into your schedule. You could do this by adding a day time break to represent the contingency, for example. Over-estimating the **Total work** for your tasks is another good method

## Tips

- To assign **Working Hours** to a task, select the hours from the **Working Hours** drop down list on the **Taskline** tab of the task form in Outlook Note that Taskline can sometimes automatically set **Working Hours** for you, when **Working Hours** have the same name as the **Project** or **Category**. [More](#)
- Consider planning some personal or thinking time at the start of the day, perhaps to plan the day's work. You could do this by entering a **Start work** time slightly later than the time you actually arrive at work. Similarly, you can schedule thinking time at the end of the day, perhaps to plan the next day's work

## Related Topics

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[Setting Your Working Hours](#)

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[Working Hours and The Taskline Task Form in Outlook](#)

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[Using Different Working hours for Different Tasks](#)

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[Taskline Settings Dialog](#)

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## Options Tab

### Task Start and Due dates

#### Taskline should set the Start and Due dates to the Scheduled dates

If this option is clicked, the **Start** and **Due** dates are always kept up-to-date and in step with the **Scheduled Start** and **Scheduled End** dates. Any standard Outlook views that require correct **Start** or **Due** dates will work correctly and tasks that exceed their **Due** dates will be highlighted in red by Outlook. [More about standard task views](#). However, any **Start** or **Due** dates you had previously entered will get overwritten, although the **Restore my original Start and Due dates** feature can restore these.

Clear this option to have Taskline leave the **Start** and **Due** date fields alone, and only update the **Scheduled Start** and **Scheduled End** dates.

#### Notes

- This option is not available if you are ordering your tasks by **Due** date, because it's confusing to order by something that is about to get changed.
- The **Start** and **Due** dates of recurring tasks are never updated by Taskline, even if you have the **Taskline should set Start and Due to the Scheduled dates** option set. This is because changing the **Start** or **Due** date of a recurring task usually generates a new (and unwanted) task occurrence.
- This does not apply to regenerating tasks, which *are* affected by this setting. [More](#)

#### Restore my original Start and Due dates

If you run Taskline with the **Taskline should set Start and Due to the Scheduled dates** option enabled, Taskline resets all the **Start Dates** and **Due Dates** on your tasks. If you now want to get your original dates back again, click this button to restore any **Start** and **Due** dates previously overwritten.

### Outlook task form initial tab (for existing tasks)

This option allows you to specify which tab is initially presented on the **Taskline** form in Outlook. New tasks always display the standard Outlook **Task** tab.

### Miscellaneous

#### If a task constraint is missed, prefix task subject with

If you enter some text into this box, Taskline will prefix the subject of any task whose constraint cannot be met with this text. The prefix will be automatically removed once the constraint can be met. Leave this box blank if you don't want Taskline to highlight missed constraints in this manner. [More](#).

#### Default minimum task split

Enter the minimum number of hours or minutes that you want Taskline to split a task into, when scheduling that task around other items, such as appointments and breaks. You can enter **h** to designate hours and **m** to designate minutes.

You can override this setting for individual tasks if you so wish by using the **Task can be split** and **Minimum task split** options on the [Taskline tab](#) of the task form in Outlook. [More](#).

	In Outlook, when you create or modify a task and enter hours or minutes in the <b>Total Work</b> box, the <b>Task can be split</b> check box is selected by default. When Taskline schedules this task and encounters conflicts, such as appointments on the Calendar, the software breaks the task into shorter parts using the value that you enter. <a href="#">More about task splitting.</a>
<b>Display Task Schedule Report when Taskline has finished</b>	If this option is clicked, the <b>Task Schedule Report</b> is presented when Taskline has finished scheduling your tasks. <a href="#">More.</a>
<b>Don't Reschedule, just recalculate folder task roll-ups</b>	Recalculates the summary information shown on <b>Folder Tasks</b> and the <b>Root Summary Task</b> without rescheduling (so task dates are unchanged). The selection state of this check box is not saved
<b>Re-number or re-letter Priority (A1)</b>	Click this button to display options that allow you to change the <b>Priority (A1)</b> values of your tasks. <a href="#">More.</a>
<b>Import Tasks</b>	Click this button to display a dialog that allows you to import tasks from a simple text list of task names. <a href="#">More.</a>
<b>Advanced Options</b>	Click this button to see less frequently used options. <a href="#">More.</a>

## Related Topics

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[Advanced Options](#)

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[Renumber or Re-letter Priority \(A1\)](#)

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[Import Tasks](#)

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[Taskline Settings Dialog](#)

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[Tasks Tab](#)

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[Projects Tab](#)

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## Renumber or Re-letter Priority (A1)

Click the **Renumber or Re-letter Priority (A1)** button on the **Options** tab of the Taskline Settings dialog to display the following options.

### Renumber the tasks in this folder

**Select...** Renumber works only with one Outlook tasks folder at a time. Select which folder whose tasks you wish to renumber here.

### Renumber

**Only update numbers, leave letters unchanged** Select this option to leave the letter part of **Priority (A1)** unchanged. Only the number part will be updated.

**Priority of first task** This option, when used in conjunction with the **Step** field, allows you to renumber the **Priority (A1)** values on all of your Taskline tasks. Enter values for the letter and number values of the priority of the first task in the first two boxes. You can then click the **OK** button to renumber the task priorities.

#### Tip

- You set the **Priority (A1)** values on a task when you open the task and enter values on the **Taskline tab** of the **Taskline** form.

**Step** This option, when used in conjunction with the **Priority of first task** settings, allows you to enter the difference between the **Priority (A1)** values on all of your Taskline tasks. Enter whatever gap you want between consecutive tasks here. For example, if the priority of your first task is B10, and you enter 5 here, your tasks are assigned **Task Priorities** of B10, B15, B20, B25, and so forth. Usually, you should enter a larger **Step** value; later, this allows you to quickly add a new task between existing tasks. Click the **OK** button to renumber the task priorities.

### Change letter

**Change \_\_\_ to \_\_\_** This option allows you to change the letter of the **Priority (A1)** values on all of your Taskline tasks to a new letter that you enter. The numeric part of the **Priority (A1)** value is not changed. Enter the letter that you want to change in the first box. In the second box, enter the new letter that should replace it. Click the **OK** button to re-letter the task priorities.

#### Tip

- You set the **Priority (A1)** values on a task when you open the task and enter values on the **Taskline tab** of the **Taskline** form.

### Renumber or re-letter the following task types too

**Tasks with "Schedule this task" unset** Normally, Taskline does not process tasks which have the **Schedule this task** check box unset. This check box is on the **Taskline tab** of the task form. However, you can select this option to have Taskline renumber or re-letter ignored tasks too, which is useful if you have some tasks that are temporarily on hold but you don't want them to get out of sequence during a renumber.

**Tasks that are deferred or waiting on someone else**

Normally, Taskline does not process tasks that have their **Status** set to **Deferred** or **Waiting on someone else**. However, you can select this option to have Taskline renumber or re-letter these tasks too, which is useful if you have some deferred or waiting tasks that you don't wish to get out of sequence during a renumber.

#### **Related Topics**

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[Defining the Order in Which Tasks are Scheduled](#)

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[Priority \(A1\) on the Taskline Task Form](#)

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## Import Tasks

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Taskline allows you to take a task list created in


- A text editor or a word processor, such as Notepad or Word
- Any application that copies task information, as text, to the Windows clipboard, such as Excel

and create a set of tasks in Outlook from that list.

To import tasks:

1. Select your list in your text editor or spreadsheet and copy it to the Windows clipboard
2. Open the **Import Tasks** dialog. To do this, start Taskline by clicking the **Taskline** toolbar button in Outlook. Then click the **Options** tab, and then the **Import Tasks** button
3. Choose the format of the data on the clipboard:
  - If your list was a simple text list of task **Subjects**, select the **Simple list** radio button
  - If the list you have copied to the clipboard was a bulleted or number list, containing only the task **Subject**, select the **Numbered or bulleted list** radio button. The bullets or numbers will then be removed, as you won't want these in the task **Subject**
  - If you have a table of task information, copied as text to the Windows clipboard (for example, from Excel), use the **Table with column headings** option to create tasks from the information on the clipboard. The first line of text on the clipboard must be the column headings (i.e. the names of the task properties) with the lines underneath being the task values, one line per task. Column headings and task values must be separated by tab characters. This is the default used by Excel and many other programs.

The dialog shows the **Subject** of the first task so you can immediately see the effect the radio button selected.

4. Optionally, select initial values for the **Total Work**, **Priority (A1)**, **Project**, **Working Hours** and **Priority (Low/Normal/High)** that will be assigned to each task created. You can of course change these values after the tasks have been created.
  - **Total Work**, **Priority (A1)** or **Project** will be greyed if you are importing using the **Table with column headings** option and your table contains **Total Work**, **Priority (A1)** or **Project** columns.
  -  Note that **Working Hours** is only shown if you are using Taskline Professional Edition
5. Tasks are imported into a single Outlook folder. Select which folder you want to contain the imported tasks using the **Import the tasks into this folder** setting
6. Click **OK** to import the tasks into your nominated Outlook folder

### Column Headings Supported

Currently, the column headings (each heading corresponds to a Taskline task property) recognized are:

- Subject



- Total Work
- Project
- Categories
- A1

If there are columns with different names, these columns will be ignored by the import process.

### Notes

- For very long lines of text, only the first part of the text will be placed in the task **Subject**. In the cases where the task **Subject** is truncated, the whole of the **Subject** will be added to the task notes.
- Blank lines will be ignored by the import process

## Advanced Options

Tasks	
<b>Show the Taskline tab for tasks in all Outlook folders</b>	When this option is enabled, new tasks will always have the Taskline tab available. Otherwise, new tasks only show the Taskline tab if they are in your nominated <b>Schedule the tasks in...</b> Outlook tasks folder, which is set on the Tasks tab of the Taskline Settings dialog.
<b>Require that all tasks are assigned a category</b>	If this option is clicked, all new Taskline tasks created in Outlook must be assigned a <b>Category</b> , and any existing tasks with a <b>Category</b> cannot have their <b>Category</b> removed, although it can be changed.
<b>Keep Priority (Low/Medium/High) and Priority (A1) synchronized</b>	Keeps <b>Priority</b> and <b>Priority (A1)</b> synchronized such that Low Priority corresponds to an <b>A1</b> letter C, Medium Priority corresponds to an <b>A1</b> letter B and High Priority corresponds to an <b>A1</b> letter A.
<b>On new tasks, have 'Schedule this task' initially set</b>	You can tell Taskline to ignore certain tasks by deselecting the <b>Schedule this task</b> check box, which is on the <b>Taskline</b> tab of the Task Form in Outlook. For a new task, choose whether you want <b>Schedule this task</b> to be initially set or unset. Even if you have <b>Schedule this task</b> defaulting to being unset, it will be automatically selected if some <b>Total work</b> is set on the task.
<b>Clear Scheduled Start and Scheduled End if task not scheduled</b>	Some tasks are not scheduled, for example because the <b>Schedule this task</b> check box is not selected or perhaps because the Project a task belongs to is not scheduled. If this option is selected, then unscheduled tasks will have their <b>Scheduled Start</b> , <b>Scheduled End</b> and <b>Week Commencing</b> dates cleared by Taskline. This makes it easy to see which tasks have been scheduled, and which have not.
<b>Don't display warnings for "Finish On" tasks that are scheduled early</b>	If a task with a <b>Finish on</b> constraint is scheduled to finish before its constraint date, then normally Taskline treats this as a missed constraint. But setting this option means that finishing such tasks early is not a concern and Taskline will no longer identify the task as having missed its constraint.
<b>Round 'Default to current date and time' to next</b>	The <b>Default to current date and time</b> check box, which is on the <b>Tasks</b> tab of the Taskline's Settings dialog, is rounded up to the next time interval that you set here. This time interval must be between 1 minute and 1 hour.
<b>Default TotalWork for new tasks</b>	Set the amount of <b>TotalWork</b> to be assigned to new Taskline tasks. Enter a number of hours or a number of minutes. For example, "2.5h".
Recurring tasks	
<b>Schedule on Start date, if set</b>	Taskline should schedule a recurring task on its <b>Start</b> date.
<b>Schedule on or after Start date, if set</b>	Taskline should schedule a recurring task on or after its <b>Start</b> date.
<b>Ignore Start date</b>	Taskline should ignore the <b>Start</b> date on a recurring task and schedule it just like any other task.
<b>Schedule on Due</b>	If set, Taskline will schedule a recurring task on its <b>Due</b> date, but

<b>date, if set</b>	only if the <b>Start</b> date is unset or the 'Ignore Start date' option is selected.
<b>Schedule on or before Due date, if set</b>	If set, Taskline will schedule a recurring task on or before its <b>Due</b> date, but only if the <b>Start</b> date is unset or the 'Ignore Start date' option is selected.
<b>Ignore Due date</b>	Taskline should ignore the <b>Due</b> date when scheduling a recurring task.

### Calendar

<b>Ignore 'Out of Office' appointments</b>	Normally Taskline schedules your tasks around the appointments in your calendar, unless the appointment have <b>Show time as</b> set to <b>Free</b> . Select this option to have Taskline ignore <b>Out of Office</b> appointments, as well as <b>Free</b> appointments, so that tasks can be scheduled during time set aside for <b>Out of Office</b> appointments.
<b>Ignore 'Tentative' appointments</b>	Select this option to have Taskline ignore appointments with <b>Show time as</b> set to <b>Tentative</b> when it's scheduling your tasks. With this option not selected, which is the default setting, Taskline will schedule your tasks around <b>Tentative</b> appointments.
<b>Ignore 'Working Elsewhere' appointments</b>	This option is only available with Outlook 2013 and later. Select it to have Taskline ignore appointments with <b>Show time as</b> set to <b>Working Elsewhere</b> when it's scheduling your tasks.

### Calendar task entries

<b>Set reminders on calendar task entries</b>	This option tells Taskline to put Outlook reminders on the <b>calendar task entries</b> created by Taskline. Since one task can give rise to several <b>calendar task entries</b> , enabling this option can result in a lot of reminders.
<b>Close calendar task entry when Open Task button clicked</b>	When you open a <b>calendar task entry</b> , a Taskline toolbar is displayed and you can click the <b>Open Task</b> button to open the associated task. If this option is selected, the <b>calendar task entry</b> is closed as the task is opened. Otherwise, it is left open.
<b>Show list of attachments</b>	This option shows, on the <b>calendar task entry</b> , the names of any attachments on the task.

### Pinned calendar task entries

<b>Don't delete</b>	Don't delete Pinned Calendar Task Entries in the past.
<b>Delete those that end before the 'First task starts at' date</b>	If Taskline finds Pinned and Not Started Calendar Task Entries that end before the 'First task starts at' date, they should be deleted.
<b>Delete those that end before the current date</b>	If Taskline finds Pinned and Not Started Calendar Task Entries that end before the current date and time, they should be deleted.

### Category of calendar task entries

<b>Copy from task</b>	This option tells Taskline to copy a task's <b>Categories</b> to its <b>calendar task entries</b> .
<b>Always set to</b>	Select this option to have Taskline create all <b>calendar task entries</b> with the same <b>Category</b> . Leave blank to create <b>calendar task entries</b> with no <b>Category</b> assigned.

### Note

- If **calendar task entries** are assigned a **Category**, then Outlook shows the

**Category** color, rather than the colors set in Taskline's **Calendar Task Entry Colors** dialog. Thus if you want Outlook to use the **Calendar Task Entry Colors**, you must select the **Always set to** option and leave the edit box blank.

## Miscellaneous

<b>Reset "Don't tell me about this again" messages</b>	Selecting this option means that all the messages that no longer appear, because you selected the <b>Don't tell me about this again</b> check box, will now be displayed. The <b>Don't tell me about this again</b> option will still be available, should you wish to hide them again.
<b>ClearContext project compatibility</b>	By default, Taskline stores the project name assigned to a task in an Outlook User Defined Field called <b>Project</b> . However, if the <b>ClearContext project compatibility</b> advanced option is selected, Taskline instead uses an Outlook custom field called <b>CC-TopicName</b> . This is the name used by the ClearContext® Outlook Add-In and so aids compatibility if you also have that Add-In installed.

## Override the default location of Taskline Settings

	Taskline dialog settings are normally stored in the default Outlook Tasks folder. We recommend that you leave this location unchanged. However, in some configurations, a different Outlook folder might work better. If you need to change it, you can select a different task folder here. To revert to using the default Tasks folder, uncheck the check box.
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## Understanding Taskline

If the task reschedule is producing results that are difficult to understand, try selecting one or more of the following options. The first 4 options temporarily remove rules from the reschedule logic, to simplify the process and hopefully make it easier to understand.

<b>Ignore Max time per day</b>	If the reschedule is producing results that are difficult to understand, try this option. It will tell Taskline to ignore the <b>Max time per day</b> setting on all tasks, so that you can see what difference this makes. This check box is reset each time you run Taskline – changes are not saved.
<b>Ignore Max time per week</b>	Similar to the previous option, this option tells Taskline to ignore the <b>Max time per week</b> setting on all tasks. This check box is reset each time you run Taskline – changes are not saved.
<b>Ignore task split settings and allow tasks to be split without restriction</b>	Tells Taskline to ignore the <b>minimum split</b> setting on a task, and also the <b>default minimum split</b> setting on the <b>Options</b> tab of the Taskline Settings dialog, so that you can see what difference this makes. This check box is reset each time you run Taskline – changes are not saved.
<b>Ignore task constraints</b>	Tells Taskline to ignore <b>task constraints</b> , so that you can see what difference this makes. This check box is reset each time you run Taskline – changes are not saved.

<b>Purchase</b>	Click this button to be taken to the purchase information page of Taskline's web site. This page gives details on Taskline pricing and delivery.
<b>Enter Product Key</b>	This button displays the <b>Enter Product Key</b> dialog, which is where you can enter the registration information sent to you when you purchase Taskline. If your registration email is in Outlook, click the <b>Auto Process Registration Email</b> button to have Taskline read the email and fill in the dialog for you.
<b>Taskline Tutorial</b>	Click this button to display the Taskline tutorial.
<b>Help and Support</b>	Click the button to find out about your options for getting Taskline help and support.
<b>Choose which Taskline version to evaluate</b>	Taskline is available in 2 editions – Standard and Professional. During your evaluation period, you can switch between editions so that you may evaluate each. To change editions, select the appropriate radio button and click <b>Apply</b> .

### Related Topics

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[Purchase Taskline](#)

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[Taskline Settings Dialog](#)

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[Tasks Tab](#)

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[Projects Tab](#)

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[Calendar Tab](#)

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[Working Hours Tab](#)

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[Options Tab](#)

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## The Taskline Task Form in Outlook

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If you open an Outlook task, the task form for Outlook appears, displaying task information that you can also modify. The standard Outlook task form has two tabs: **Task** and **Details**.

If you open a Taskline task, instead of the standard Outlook task form, the Taskline task form appears. This is identical to the standard task form, except that a new tab is present, the **Taskline** tab. This tab displays all of the information and options useful to task scheduling, such as dates, duration, progress and so on. While most options, such as **Subject** and **Project**, appear on only one tab of the form, a few appear on two tabs, allowing you to enter the information on either.

### Tips

- When you create a new task, the standard Outlook **Task** tab is initially displayed. However, when you open an existing task, you can nominate which tab is initially shown by using the **Outlook task form initial tab** drop down list, on the **Options** tab of the Taskline Settings dialog.
- By default, the Taskline tab is only shown for tasks in your nominated **Schedule the tasks in** Outlook folder, which is set on the **Tasks** tab of the Taskline Settings dialog. If you want it shown for all tasks, open the **Advanced Options** dialog and select the **Show the Taskline tab for tasks in all Outlook folders** check box.

### Dates and duration

<b>Scheduled start</b>	<p>This is the estimated or most likely start date for the task. It is initially clear and is recalculated each time you run Taskline. The Taskline calculation takes into account things like appointments in your calendar, the priorities of your tasks, and any constraints on them. As few people can predict work with 100% accuracy, for example a meeting taking longer than anticipated, you cannot usually start every task exactly on schedule. However, the <b>Scheduled Start</b> date gives you a very good idea of when you are likely to start working on a task.</p> <p>For a task that is partly completed, <b>Scheduled Start</b> shows when the remaining part of the task should be started, and <b>Scheduled End</b> displays when the task is due to be fully completed. For a completed task, <b>Scheduled Start</b> shows when the task started, and <b>Scheduled End</b> displays when it ended. <a href="#">More about scheduled dates</a>.</p>
<b>Scheduled end</b>	<p>This is the estimated or most likely finish date for the task. It is initially clear and is recalculated each time you run Taskline. The calculation takes the <b>Scheduled Start</b> date and adds to it the task's <b>Total Work</b>. Taskline then adjusts for things like your normal working week, your daily breaks and appointments in your calendar, to derive the most likely end date for your task. You may not finish a task exactly as scheduled, because of unanticipated interruptions or because the task simply took longer than your <b>Total work</b> estimate. However, the <b>Scheduled end</b> date gives you a very good idea of when you are likely to finish a task. <a href="#">More about scheduled dates</a></p>
<b>Total work</b>	<p>A task's <b>Total work</b> is your estimate of how long a task will take – effectively how much work it entails. <a href="#">More</a>.</p> <p>You can enter the <b>Total work</b> as a number of minutes, hours, days or weeks; the abbreviations are m, h, d and w. For example, to set <b>Total Work</b> to 5 hours, you can type "5h" or "5 hours".</p>

When you create a new task, the **Schedule this task** check box is initially deselected. It is automatically selected by Taskline when you set **Total work** to a non-zero value. If you want to create a task with zero **Total work**, to represent a significant milestone or goal in your task list, you must remember to select the **Schedule this task** check box yourself, since **Total work** is zero in these cases.

Outlook will convert large numbers of small time units to larger time units. For example, "120 minutes" converts to 2 hours, and 8 hours converts to 1 day, assuming that there are 8 working hours in the day. See [Setting the Working Week](#) for information on how to set the number of working hours in a day.


## Progress

<b>Actual start</b>	This is the date the task actually started. It is set only for a task that is in progress or completed. You don't need to set this field unless you want to – if you leave it blank, Taskline sets it for you. <a href="#">More</a> .
<b>Status</b>	This is the standard Outlook field that is also on the <b>Task</b> tab of the task form. Note that Taskline will not schedule tasks whose status is set to <b>Deferred</b> or <b>Waiting on someone else</b> and such tasks will also have their <b>Scheduled Start</b> , <b>Schedule End</b> and <b>Week Commencing</b> fields cleared.
<b>Actual work</b>	<p><b>Actual Work</b> is the amount of time spent on the task to date. This is in contrast to <b>Total work</b>, which is how much time you thought you would spend on the whole task. <b>Actual Work</b> is optional, but it is often useful to record how your time has been spent. You can also look back at this information when scheduling similar work in the future.</p> <p>When you get part way through a task, you may then realize that your initial estimate is not correct. In this case, you should update <b>Total work</b> as well, so that your schedule remains realistic and achievable.</p> <p>You can set either <b>Actual Work</b> or <b>% Complete</b>, or set both of them, or ignore these fields and set none of them. <a href="#">More</a>.</p> <p>The format of the <b>Actual Work</b> field is the same as <b>Total work</b> and is a number followed by a time unit, such as "5h" for 5 hours.</p>
<b>% Complete</b>	The percentage of the task that has been completed. If you don't think in terms of percentages, you can enter information in <b>Actual Work</b> instead. Both of these fields are optional. <a href="#">More</a> .
<b>Work remaining</b>	This information is display only and you cannot edit it. <b>Work remaining</b> shows the amount of work that is still outstanding on the task. <a href="#">More</a> .



## Reminder

<b>Reminder</b>	<p>Click the <b>Reminder</b> check box and enter an amount of time to set a reminder on a task. Taskline task reminders use working time, not elapsed time. So, for example, if you wish to be reminded one day in advance about something that starts on Monday, Taskline instructs Outlook to remind you on Friday, assuming that you do not work weekends.</p> <p>Taskline reminders work by setting up the standard Outlook reminder on your behalf. Thus you can't use both types of reminder on the same task at the same time. <a href="#">More</a>.</p>
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## Scheduling control

<b>Schedule this task</b>	<p>Select this box to have Taskline include the task in the reschedule. Deselect it to have Taskline ignore the task. In this latter case, Taskline clears the <b>Scheduled Start</b>, <b>Schedule End</b> and <b>Week Commencing</b> fields. This check box is initially deselected by default. However, when you enter a non-zero value in the <b>Total work</b> box, this also selects the <b>Schedule this task</b> check box, allowing Taskline to schedule the task. Thus, tasks that have zero hours for the <b>Total work</b> box are not scheduled, unless you select the <b>Schedule this task</b> check box.</p> <p>You can change the default value for <b>Schedule this task</b> on the <a href="#">Advanced Options</a> dialog.</p>
<b>Show as</b>	<p>Use this drop down list to set the <b>Free/Busy</b> status of the calendar task entries for this particular task. If it is left blank then the <a href="#">Show time as</a> setting on the Calendar tab of the Taskline Settings dialog is used. The <a href="#">Show time as</a> setting is the default value for all tasks; this default can be overridden by using this setting.</p>
<b>Task can be split</b>	<p>Select this option to allow Taskline to divide a task into shorter parts when, during task scheduling, it encounters fixed items such as calendar appointments and day time breaks. This makes optimum use of your available time. Clear this check box if you want the whole task to be scheduled as one contiguous item, assuming a sufficiently long time slot is available. <a href="#">More about task splitting.</a></p>
<b>Project</b>	<p>Use the <b>Project</b> control to optionally enter the name of a project that the task belongs to. Giving a task a project name is useful for grouping together related tasks. You can type a new project name into the box, or click on the down arrow to select an existing project name that you have used before.</p> <p>With Projects, you now have a second way of categorizing tasks, in addition to the standard Outlook method of Categories. A Project describes a related set of tasks, for example all the work for one particular customer or a description of a significant collection of work, such as an office relocation. Categories on the other hand refer to the type of work, such as administration, report writing, meetings etc. As a guide, categories tend to be fixed, while projects tend to change over time.</p> <p>After a while, you may find that the <b>Project</b> list contains previously used project names that you do not intend to use again. In this case, you can remove these old names from the list by clicking the <b>Projects</b> tab of the Taskline Settings dialog. <a href="#">More about projects.</a></p>
<b>Minimum split</b>	<p>This option is only available if the <b>Task can be split</b> option is selected. It specifies the shortest part that Taskline may split a task into. For example, if you enter 30 m for 30 minutes, then if Taskline needs to split the task, each part will be 30 minutes or greater in duration.</p> <p>You can set a default minimum split for all tasks by using the <b>Default minimum task split</b> option on the <b>Options</b> tab of the Taskline Settings dialog. <a href="#">More.</a> The <b>Default minimum task split</b> is only used when <b>Minimum split</b> is set to zero on the task form. <a href="#">More about task splitting.</a></p>
<b>Working hours</b>	<p> Taskline Professional Edition only. Set the <b>Working Hours</b> to tell Taskline which hours are applicable to this task. You can type the name of the <b>Working Hours</b> in, or select it from the drop down list. But you must first define your <b>Working Hours</b>, using the <b>Working Hours</b> tab of Taskline's Settings dialog. <a href="#">How?</a></p>



	<p>If no hours are assigned to a task, then the default hours are used. You set which <b>Working Hours</b> are the default ones by selecting the <b>Default hours</b> radio button on the <b>Working Hours</b> tab of Taskline's Settings dialog.</p> <p>Sometimes you may want tasks of a certain <b>Project</b> or <b>Category</b> to always have the same <b>Working Hours</b> assigned. For example, you may want tasks of <b>Category</b> "Personal" to be scheduled for weekends. If you give the <b>Working Hours</b> exactly the same name as a <b>Project</b> or <b>Category</b>, Taskline will automatically assign the <b>Working Hours</b> for you. Specifically, if the <b>Working Hours</b> are currently unset, then:</p> <ol style="list-style-type: none"> <li>1. If <b>Working Hours</b> exist that have the same name as an assigned <b>Category</b>, then those hours are automatically assigned.</li> <li>2. Or, if <b>Working Hours</b> exist that have the same name as the assigned <b>Project</b>, then those hours are automatically used.</li> </ol>
<b>Priority (A1)</b>	<p>Enter a <b>Priority (A1)</b> value. A valid <b>Priority (A1)</b> must consist of at least one letter, A-Z, followed by an optional number ranging from 0 to 99. Examples of valid <b>Priority (A1)</b> values are B, A05 and X40.</p> <p><b>Priority (A1)</b> is one of the ways of ordering your tasks. <a href="#">More about task ordering</a>. It is usually advantageous to leave gaps between the task priorities of consecutive tasks, so that you may later give another task a priority between existing ones, without having to reprioritize existing tasks. For example, you might wish to give the first task you want to work on task priority A10, the second one task priority A20, and so on. <b>Priority (A1)</b> is like the Outlook <b>Priority</b> option, except that <b>Priority</b> lets you use only three values: <b>Low</b>, <b>Normal</b>, and <b>High</b>.</p> <p>You can reassign <b>Priority (A1)</b> values by clicking the <b>Renumber or Re-letter Priority (A1)</b> button on the <b>Options</b> tab of the Taskline Settings dialog. <a href="#">More</a>.</p> <p>There is no need for the logic links used in Project Management software – Taskline uses task ordering to achieve a similar result.</p>
<b>Max time per day</b>	<p> <b>Max time per day</b> is used to limit the amount of time allocated to a task each day. It can be used to spread a longer task out over several days or weeks, for example to divide your time between 2 or more tasks, rather than working on a single task exclusively until it's completed.</p> <p><b>Note</b></p> <ul style="list-style-type: none"> <li>• This feature is not supported in the evaluation version of Taskline.</li> </ul>
<b>Max time per week</b>	<p> <b>Max time per week</b> is used to limit how much time is allocated each week to a long task.</p> <p><b>Note</b></p> <ul style="list-style-type: none"> <li>• This feature is not supported in the evaluation version of Taskline.</li> </ul>
<b>External constraint</b>	
<b>Task constraint drop down list</b>	<p>Usually you need only tell Taskline in which order to schedule your tasks. You do this by using the <b>Order by</b> settings on the <b>Tasks</b> tab of the Taskline Settings dialog. <b>Priority (A1)</b> or <b>Natural Order</b> are both common choices for task ordering. <a href="#">More</a>. Sometimes however, external constraints</p>

come into play, such as deadlines, or perhaps you are waiting on a delivery before you can start work on a task. For such tasks, select a constraint from the dropdown list. For example, **Finish on or before** constraints work well with deadlines. [More](#).

Once you've entered a constraint, you will need to enter a date for that constraint. When is the deadline, or when is that delivery due? You do this by entering a date to the right of the calendar icon or by clicking on the dropdown list to display the **Date picker** and clicking a date on that.

If you need to be accurate, you can also enter a time for the constraint.

### Important

- Task constraints should be the exception, not the norm. Most of your tasks should be unconstrained and only those with deadlines or other external date issues should have constraints. If you place constraints on most of your tasks, then you are effectively manually scheduling and therefore stopping Taskline was working effectively.

### Note

- The **Work between** constraint is not supported in the evaluation version of Taskline.

### Select any other tasks also affected by this constraint

For tasks with a constraint, you can optionally tell Taskline that other tasks are also affected by that constraint. For example, you might have a package of work that consists of three tasks, and none of them can start until someone else gives you a report they're writing. In this case, you would:

1. Set a **Start on** or a **Start on or After** constraint on the first task you wish to work on.
2. Check the **Select any other tasks also affected by this constraint** check box.
3. Select the other two tasks from the list by clicking on them. To deselect a task, click it again.

The following types of tasks cannot be made dependent upon other tasks and hence will not be displayed in the **Select any other tasks also affected by this constraint** list:

- **Completed** tasks
- **Recurring** tasks, because these are already constrained to happen on a certain day and you can't have two constraints on one task
- **Delegated** tasks, because someone else is doing them
- Tasks with their **Status** set to **Deferred** or **Waiting on someone else**, because these are effectively on hold and hence Taskline ignores them
- Tasks with the **Schedule this task** check box deselected. These are, by definition, ignored by Taskline
- Tasks with **constraints**, again because you can't have two constraints on one task
- **Folder Tasks**

Do not try to use the **Select any other tasks also affected by this constraint** list to set task order. You should use **Order by** for that. [How?](#) This dependency list is only used when a constraint applies to more than one task.

**Show  
projects**

You may have tasks with the same subject but in different projects. For example, each of your projects may have a "Produce final project report" task. To differentiate different tasks with the same subject, select the **Show projects** check box. This will prefix the project name to the task subject in the **Select any other tasks also affected by this constraint** list box.

## Task Schedule Report

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The **Task Schedule Report** gives you a report of all your Taskline tasks in all your Taskline folders. You have a lot of control over how this information is presented.

### Note

- The report is only shown if the **Display Task Schedule Report when Taskline has finished** check box, which is on the **Options** tab of Taskline's Settings dialog, is selected.

### Columns

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The report displays the following columns. Column selection is automatic, there is no facility to manually select the columns displayed on the report.

<b>Priority Low/Normal/High</b>	This column is only shown if at least one task has an <b>Importance</b> other than <b>Normal</b> or if you have <b>Priority Low/Normal/High</b> as an <b>Order by</b> setting on the <b>Tasks</b> tab of Taskline's Settings dialog
<b>A1</b>	This column is only shown if at least one task has an <b>A1</b> value assigned or if you have <b>Priority (A1)</b> as an <b>Order by</b> setting on the <b>Tasks</b> tab of Taskline's Settings dialog
<b>Task Subject</b>	The task's <b>Subject</b> . Only shown if the <b>All tasks</b> option is selected
<b>Folder</b>	The name of the folder the task belongs to. Only shown if more than one Outlook folder has been rescheduled
<b>Project</b>	The <b>Project</b> assigned to a task. Only shown if at least one task has a <b>Project</b> assigned
<b>Category</b>	The <b>Category</b> assigned to a task. Only shown if at least one task has at least one <b>Category</b> assigned
<b>Working Hours</b>	The <b>Working Hours</b> assigned to a task. Not shown if all the tasks have the same <b>Working Hours</b>
<b>Scheduled Start</b>	The task's <b>Scheduled Start</b>
<b>Scheduled End</b>	The task's <b>Scheduled End</b>
<b>Start Date</b>	The task's <b>Start</b> date. Only shown if the <b>Start and Due dates</b> check box is selected
<b>Due Date</b>	The task's <b>Due</b> date. Only shown if the <b>Start and Due dates</b> check box is selected
<b>Total Work</b>	The task's <b>Total Work</b>
<b>Work Remaining</b>	The amount of work to do on the task. <b>Work Remaining</b> accounts for both <b>% Complete</b> and <b>Actual Work</b> . Only shown if at least one task has some progress assigned
<b>Work Done</b>	The amount of work done on the task. Effectively <b>Total Work – Work Remaining</b> . Only shown if at least one task has some progress assigned
<b>% Complete</b>	A task's <b>% Complete</b> setting. Only shown if at least one task has some progress assigned

### Show

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The **Show** options allow to either display information on every task, or summarize

information based on **Project, Category, Folder** or **Working Hours**. For example, if you summarize by **Working Hours**, there will be one row for each **Working Hours** assigned to a task, and each row will show rolled-up values for every task with those **Working Hours** assigned. Roll-ups are calculated in exactly the same way as [Folder Task Roll-ups](#). When displaying the report with one of the summary options, an **[All Tasks]** row is displayed last. This is a roll-up of all the tasks scheduled by Taskline.

#### Note

- If a task has more than one **Category** assigned, and you are showing the **Category summary**, that task will be accounted for in every **Category** assigned to it. In this case, the **[All Tasks]** row will not be the same as the roll-ups of all the rows above it.

If the **All tasks** option is selected, you will see one row per task. In this case, no information is summarized, you see the values on each task. In this sense, it is quite similar to Outlook's task table view, although the report will list all tasks in all folders scheduled by Taskline.

The **Start and Due dates** check box toggles the display of the **Start Date** and **Due Date** columns.

The **Copy Table to Clipboard** button enables you to copy all the report information to the Windows clipboard, where it can be pasted into another application, such as Microsoft Excel.

#### Group By

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The **Group by** options are only available if the **All tasks** option is selected. They allow you to group tasks by **Project, Category, Folder** or **Working Hours**. Unlike the summary **Show** options, the **Group by** options still display information on every task, but grouped by the chosen task attribute.

#### Filter

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The **Filter** check boxes are only available if the **All tasks** option is selected. They allow you to include, or remove, tasks based on their **Status**.

#### Sort by, And then by

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These options are only available if the **All tasks** option is selected. They allow you to have the task list ordered by the chosen task attributes.

#### Elapsed time to complete remaining work

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This is the time between **First task starts at** date and the **Scheduled End** of the last task.

#### Related Topics

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[Folder Task Roll-Ups](#)

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[Using Projects](#)

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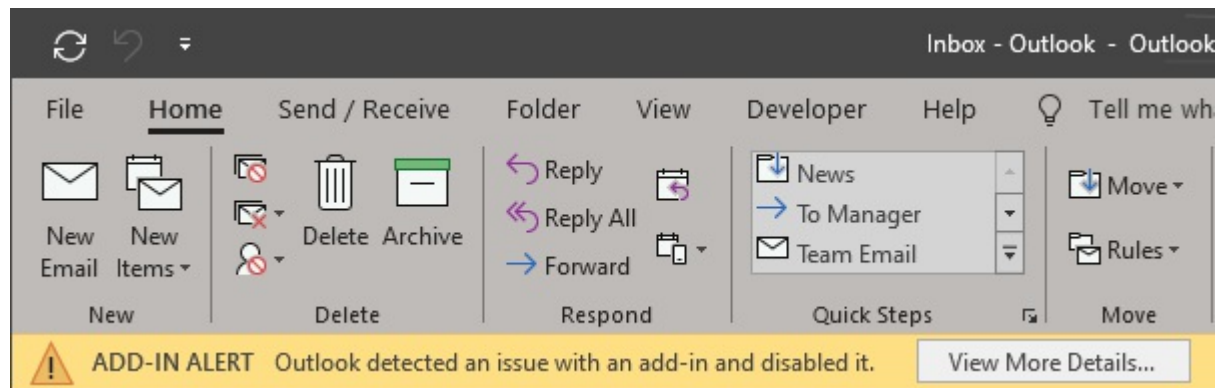
[Progress: Working Through Your Task List](#)

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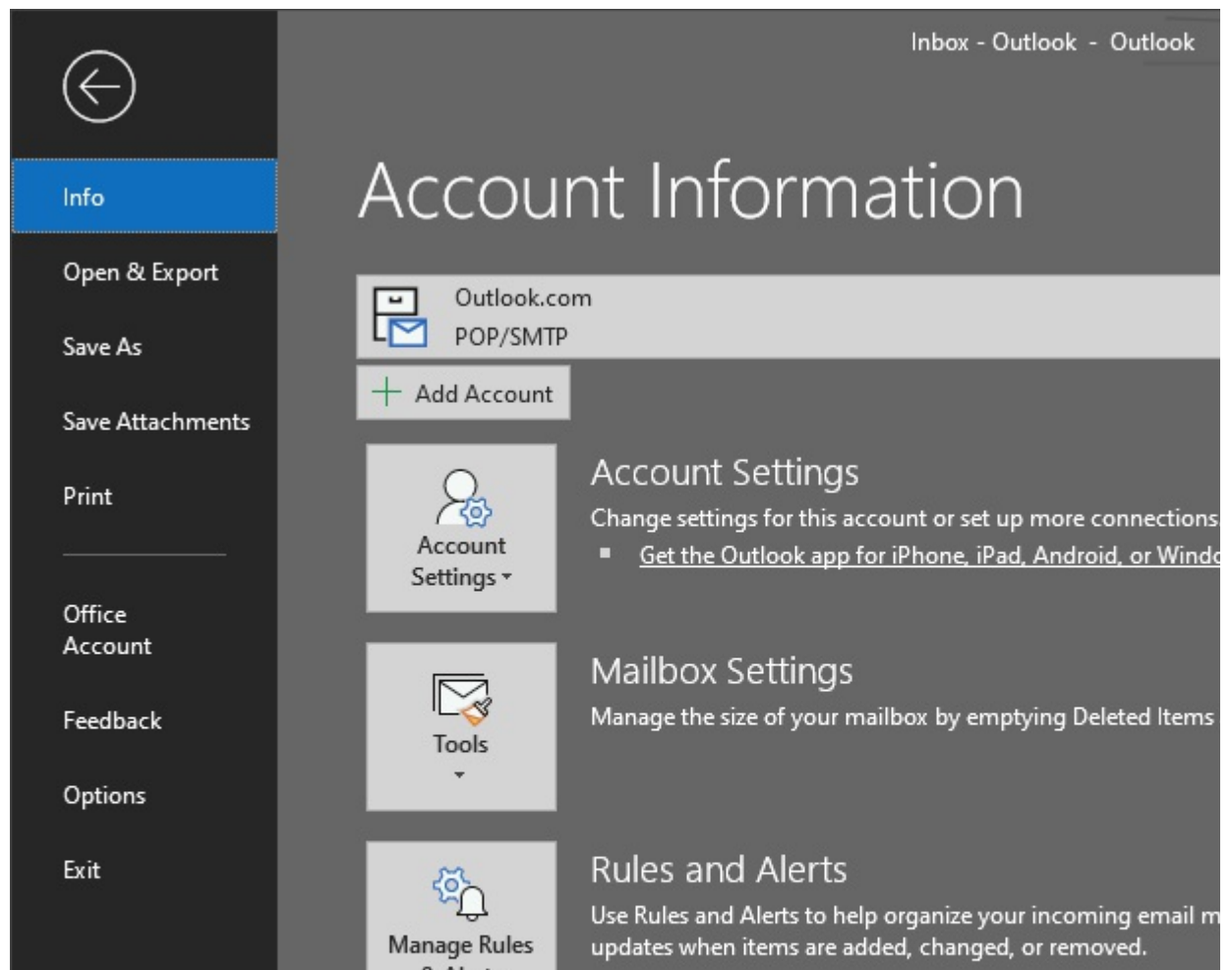
## Taskline's Outlook Add-In is Not Responding

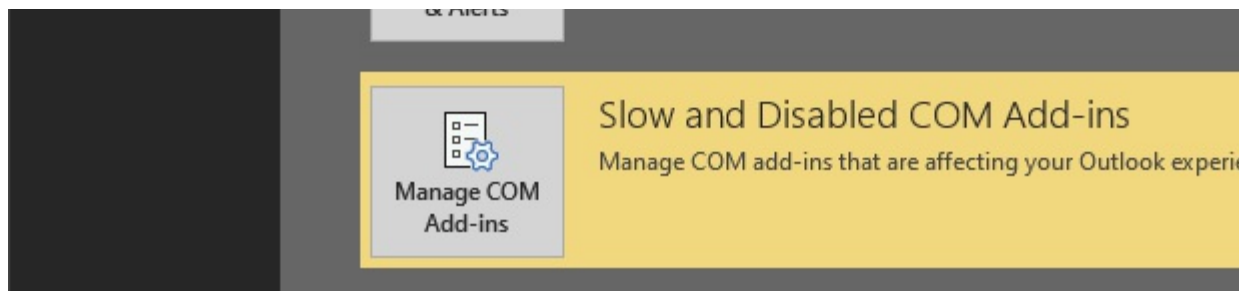
Outlook 2013 and later have some built-in target start-up times for Outlook Add-Ins that even a functionless skeleton Add-In produced by Microsoft's own Visual Studio Add-In wizard cannot meet. Consequently, Taskline's Outlook Add-In often gets disabled by Outlook 2013, 2016 and 2019. This stops Taskline from working and you must permanently enable Taskline's Add-In to continue using Taskline. The instructions below are for Outlook 2019, but other Outlook versions are similar.

When you start up Outlook, you may see **ADD-IN ALERT** just below the main window's ribbon:

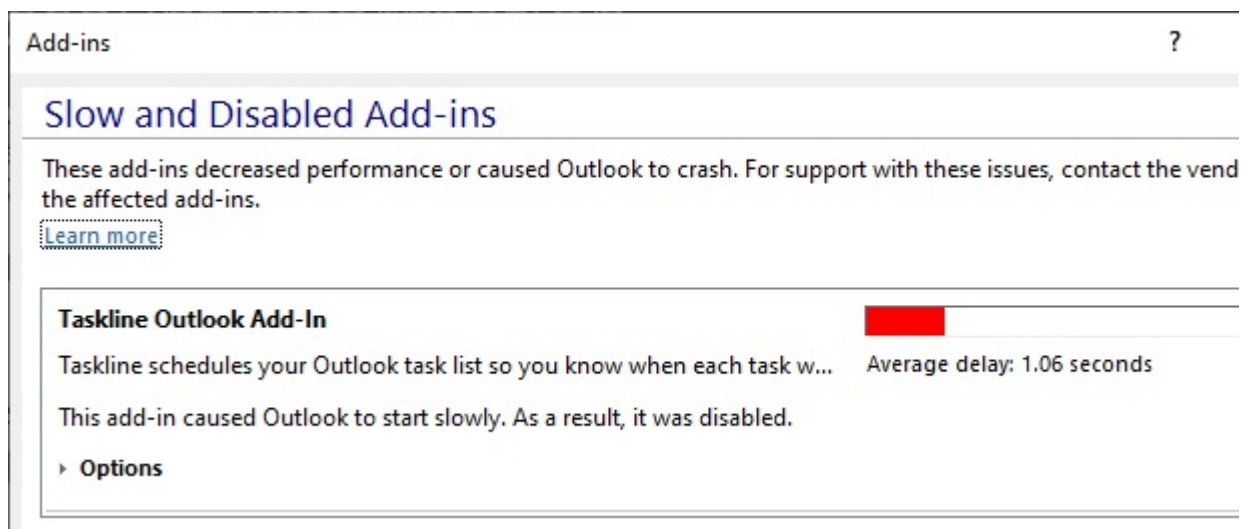


To fix this, click the **View More Details** button, if it is displayed, or click the **File** menu → **Manage COM Add-ins** button on the **Info** tab:

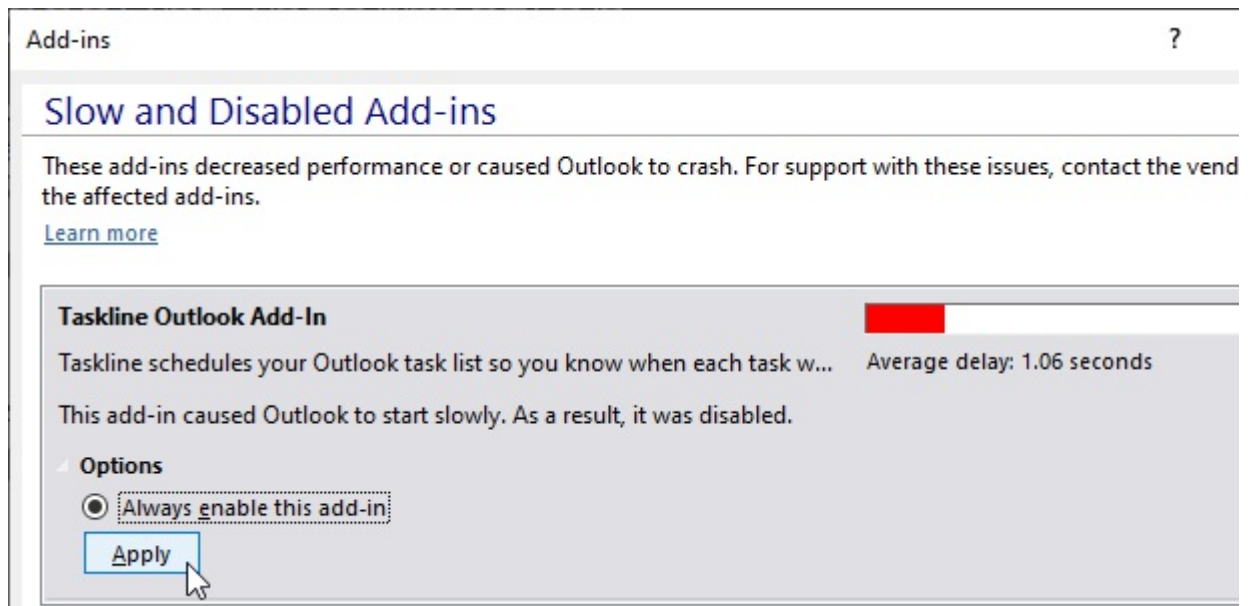




This will display the **Slow and Disabled Add-ins** dialog:



Click **Options** → **Always enable this add-in** → **Apply** → **Close**:

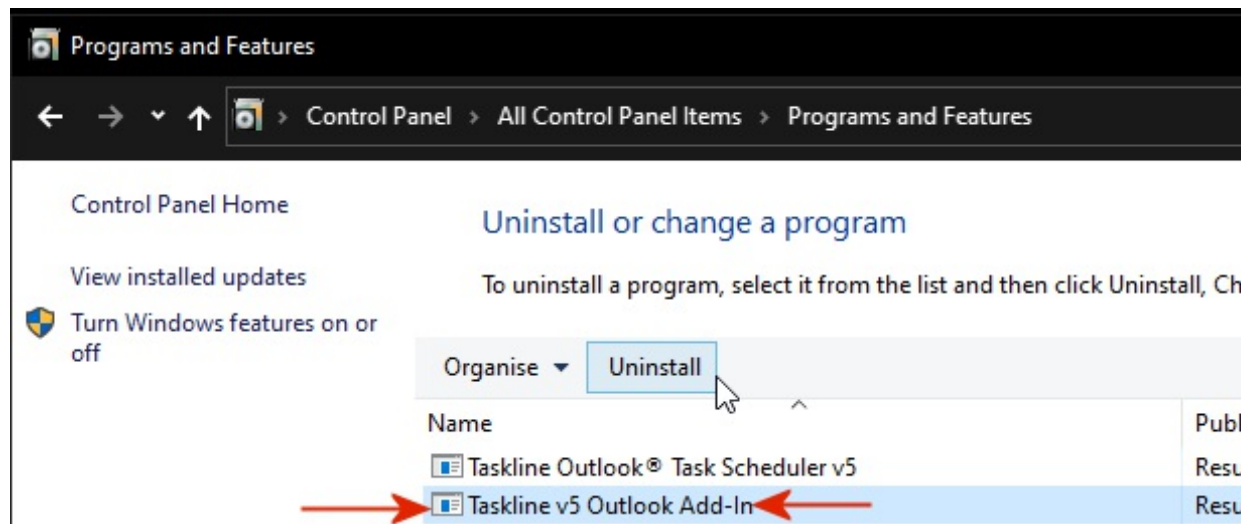


#### If, After Trying All of the Above, the Add-In Is Still Not Being Loaded

You need to be familiar with Windows RegEdit before following the advice below.

**1.** Exit Outlook and uninstall the **Taskline Outlook Add-In** (not Taskline Outlook Task Scheduler) using Windows Control Panel:



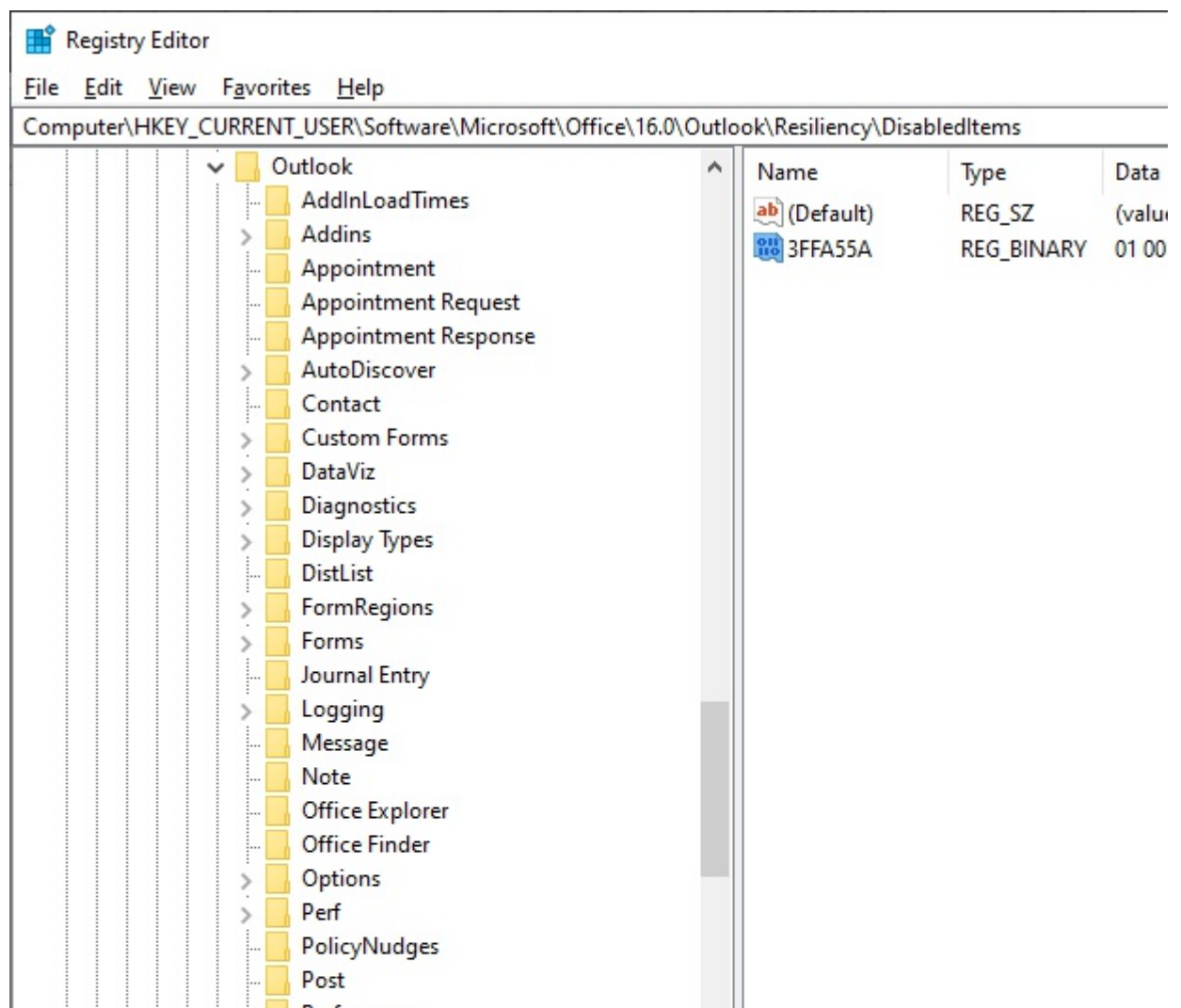


2. Open RegEdit and locate the following registry key:

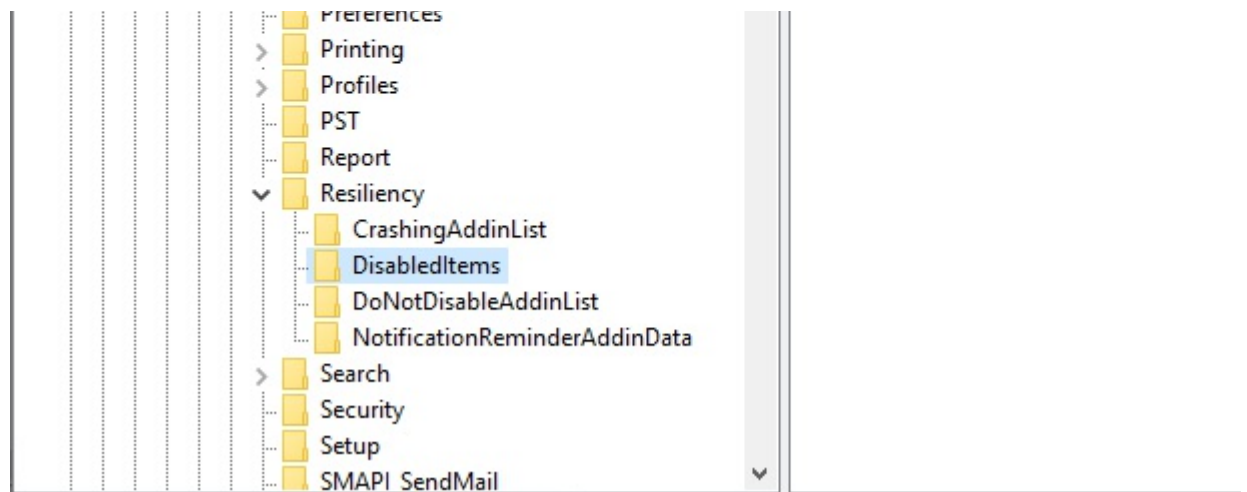
HKEY\_CURRENT\_USER\Software\Microsoft\Office\16.0\Outlook\Resiliency

(replace 16.0 with 15.0 if you are using Outlook 2013, or 14.0 for Outlook 2010)

3. Remove the REG\_BINARY values found in **DisabledItems** and **CrashingAddinList** keys:







**4.** Finally, run Taskline Setup to reinstall Taskline.

## Outlook VBA Code and Taskline

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### Accessing Taskline Custom Task Properties (User Defined Fields)

To access Taskline's custom task properties, use:

```
Task.UserProperties("Name of Property")
```

For example, to assign to the **Priority (A1)** property, use:

```
Task.UserProperties("A1") = "B25"
```

A full list of Taskline custom properties is available at [Fields Specific to Taskline Tasks](#)

### Example Code

The following example creates a new Taskline task. It then assigns values to various standard and Taskline-specific task properties.

```
Private Sub CreateTasklineTask()  
Dim Task As TaskItem  
Set Task = CreateItem(olTaskItem)  
' Task.Display causes Taskline's Add-In to add all the Taskline User Defi  
' Fields to a new task. It can be omitted for existing tasks.  
Task.Display  
With Task  
    .Subject = "Example Taskline Task"  
    .TotalWork = 60 ' This is 60 minutes  
    With .UserProperties  
        .Item("A1") = "B25"  
        .Item("Working Hours") = "24/7"  
    End With  
    .Close (olSave)  
End With  
End Sub
```

### Related Topics

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[Fields Specific to Taskline Tasks](#)

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## Newsletter Articles

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### Taskline Tip — Comparing How You've Done With How You Thought You'd Do

If you're brave enough to want to compare your actual performance with your scheduled performance, try this. Enable the **Taskline should set Start and Due to the Schedule dates** option, run Taskline, and then turn this option off for subsequent reschedules. You can now compare your original dates (the **Start** and **Due** dates) with your latest estimates (the **Scheduled Start** and **Scheduled End** dates), or when you actually started (**Actual start**).

### Taskline Tip — Unscheduled Tasks

One of the most common reasons for slipping behind schedule is the failure to adequately plan for unscheduled tasks and interruptions. It's a mistake we even make ourselves. Phone calls, people stopping to talk and the odd 5 minute task that needs your prompt attention all add up. Collectively, if not individually, these items are predictable, so schedule them in. You could do this by adding a recurring appointment, or a day time break to reserve the necessary time, or by simply telling Taskline that your working day is shorter than it actually is. Doing so will increase your job satisfaction and make the dates you give to others more reliable.

### Taskline Tip — Printing Schedules

Most people find time management difficult. This is human nature. We prefer doing the things we like and we put off the things we don't like, for example. Having an Outlook printout of your Taskline schedule on your desk really helps to combat these traits by giving you focus. Printing out a calendar, complete with calendar task entries, is particularly useful in this regard. You can then refer to the printout during the day to see what you should be working on and how you're doing.

There are several lesser known Outlook features that can assist when it comes to printing out a schedule:

- **Date range.** With your Outlook calendar open, click **File** → **Print**. You can then use the **Print Range** settings to say when you want the printout to start and end.
- **Setting the font for printing.** Click the **Define Styles** button on the **Print** dialog. Click on the style you prefer (I use the **Monthly Style**) and click **Edit**. Here you can change the print font without changing the on-screen font. Arial Narrow is particularly useful for printing.
- On the same dialog, for the **Monthly Style**, it is often useful to clear the **Print Exactly One Month per Page** check box if you are printing out a schedule mid-month.
- You may wish to filter the calendar view before printing. If you wanted a calendar view of just your Taskline tasks for example, you could do this by setting up a filter. Click **View** → **Current View** → **Customize Current View** → **Filter** → **Advanced tab** → **Fields** → **User defined fields in folder** → **@CreatedByTaskline**. Set the condition to **exists**. Outlook 2003 users need to click **View** → **Arrange By** → **Current View** → **Customize Current View** etc.

You could also filter on **label**, **category** or **Show time as** to remove certain types of appointments from your printout.

### Taskline Tip — Printing a Whole Online Help Chapter in One Step

With the online help, you can click on a chapter heading in the **Contents** tab (i.e. the lines with the purple closed book icon) to select it. If you then click the **Print** toolbar button, you'll be given an option to **Print the selected heading and all subtopics**.

Thus the whole chapter gets printed out. The pagination isn't great, but it works.

### Taskline Tip — Lost Product Key

Should you ever lose your Taskline product key, you can have it automatically resent via our web site. The 2nd entry in the Support FAQ on the site gives full details:

[www.taskline.com/FAQ.asp#KeyQ](http://www.taskline.com/FAQ.asp#KeyQ)

### Taskline Tip — A Scheme for Prioritizing and Organizing Tasks

Task prioritization is important in encouraging you to do the most important tasks first. But how do you prioritize your tasks when you have hundreds of them? This is an interesting method devised by Taskline user Aviv Riftin. He is a Project Manager who works in a hectic environment, dealing with 40 different projects and tasks that originate from around 20 different people. He also has to cope with urgent requests from his boss and ends up having almost 50% of his tasks that weren't planned for originally

To cope with this, and to keep the amount of time he spends prioritizing tasks to a minimum, he has agreed a 12 level task categorization scheme with his boss, which is a sort of priority map. For example, a "show stopper" is **A10**, a task related to his boss is **A20** and so on. He recalls that actually setting up these priorities was a useful exercise in itself, because it was a good opportunity to agree with colleagues on how tasks should be prioritized.

Each time a new task arrives, it gets categorized and then given a priority based on that category. Then he immediately runs Taskline, and looks out for warnings about missed constraints. If that happens, he does one of three things:

1. Delay some constraint, if possible.
2. Phones the client to tell them to expect a delay. As he points out, this step is important; clients will usually accept some delay if you tell them about it in advance.
3. Phones his wife to tell her he's going to be working late...

### Taskline Tip — An Alternative Scheme for Prioritizing and Organizing Tasks

This is how our support engineer, Charles Sinclair, manages his tasks. Charles has a lot of scheduled work to do, such as authoring our web site and Taskline Q/A work, as well as handling all of our support. He wrote:

Personally, I don't use **Priority (A1)**. I prefer to use **Natural Order** for several reasons:

1. I can only work on one task at any one time and so I like a system that forces me to put tasks into priority order. With **Priority (A1)**, you can give several tasks the same priority, and so continually defer "What shall I do next?" decisions. This can be unproductive if you end up revisiting the same issue several times.
2. I can change the priority of a task visually, by dragging it up or down the task list.
3. You cannot get duplicate priorities. When you change a task's priority, other tasks in effect have their priorities automatically updated to accommodate this.

Of course, if you have 100's of tasks, deciding individual priorities is difficult. To get round this, I just keep roughly 30 to 90 (it varies a lot!) of my most pressing tasks in my **Tasks** folder. The rest I move to a 2nd task folder I call "Future Work". Keeping this split helps me focus on the work in hand and also helps psychologically — staring at a huge task list can be depressing! I keep my "Future Work" list in approximate priority order. When my working task list gets down to about 20 tasks, I move the 30 or so most important tasks from my Future Work folder to my working tasks folder, putting them into the exact order I intend to work on them in the process.

Periodically, when I want to see the big picture, I run Taskline on my Future Work folder. When I do this, I set the **First Task Start At** date to the finish date of the last task on my working task list. This then gives me a good feel for when long term work is likely to be completed.

### Task Planning With Taskline — A Recommended Approach

We often get asked about "best practice" with Taskline. Best practice is hard to define as different processes work for different people in different situations, but the following approach should work well for most people.

1. Firstly, working to an unachievable schedule is stressful and disheartening, so take a little time to make sure that your schedule is achievable. Check that:
  - a. You haven't left any tasks out
  - b. Task Total work values are reasonable
  - c. Appointment travel times are reasonable
  - d. Task ordering is correct
  - e. Any applicable deadlines have been entered
  - f. You have left yourself enough free time to manage the inevitable unscheduled interruptions that happen during the day — phone calls, coffee breaks, people walking in for a chat, thinking time (very important) etc. You could do this by making an existing day time break longer than it needs to be, or by entering a day time break specifically for this purpose, or perhaps by setting the **I start work at** and **I stop work at** times conservatively.
2. Run Taskline and visually check that the schedule looks reasonable (i.e. you have not made any mistakes). Then print the schedule off and keep it on your desk as a reference.
3. Try and stick to the schedule. It'll give you focus:
  - a. At the start of each day, quickly look at what you're expected to achieve that day.
  - b. At the end of each day, take a quick look at what you've got on for tomorrow.
4. Mark tasks off as complete (or part complete if you prefer) when you've done them, to keep the schedule up to date, and to remind yourself that you are making progress!
5. When a new task comes in, give it a priority and a **Total work** value. Then
  - a. If it's urgent, rerun Taskline there and then. You may then need to print off an updated schedule.
  - b. If it's non-urgent, there's probably no point in running Taskline just yet, as it may rearrange your short term schedule, which you may not want.
6. Eventually, the schedule will get out of shape. At this stage, don't stress yourself out chasing the unachievable. So:
  - a. Look at why the schedule got out of shape. Can you make any adjustments to improve the accuracy of the next one?
  - b. Rerun Taskline to calculate a new schedule.
  - c. If any deadlines are now being missed, or dates promised to others can no longer be achieved, tell them. The earlier you give people notice of delays, the more willing they will be to accept them, not least because it gives them time to adjust too.

7. So, how often will you run Taskline? It depends:

- a. A survey of Taskline users revealed that the average was 6 times per week, but some people (who I guess have tasks coming at them from all angles) run it up to 50 times a week.
- b. If you have a fairly stable schedule, or if you need to try and stick to an agreed schedule, then once a week or less is sufficient.

#### Outlook Tip — Use Auto Formatting To Differentiate Different Task Types

Outlook has some nice auto-formatting capabilities. You could use these to, for example, highlight tasks that are due this week in bold or show tasks that are ignored by Taskline in gray.

To highlight tasks due this week, open your tasks folder and click **View** → **Current View** → **Customize Current View**. Outlook 2003 users click **View** → **Arrange By** → **Current View** → **Customize Current View**. Click the **Automatic Formatting** button and then click the **Add** button. Give the rule a name (for example, "Due This Week") and then click the **Condition** button. On the **Filter** dialog, click the **Advanced** tab, then the **Field** button and choose the **Forms** entry. On the dialog that appears, make sure **Personal Forms** is selected in the drop down list at the top of the dialog, then add Taskline to the right hand list box and **Close** the dialog. Click the **Field** button again but this time click **Taskline**, which should now be visible in the list, and then click **Scheduled End**. Then simply set the condition to **this week** and click the **Add to List** button. **OK** the Filter dialog to return to the **Automatic Formatting** dialog and then click the **Font** button to select how you wish tasks due this week to be highlighted.

To highlight tasks ignored by Taskline, the procedure is very similar, but you would set up a condition of **Ignore task** equals **Yes** on the Filter dialog.

#### Outlook Tip — Using Grouping to Edit Many Items in One Go

Outlook allows you to group table views by any field. For example, you may choose to group your tasks by **Project**. This groups together all tasks with the same **project**, under a project heading, and also allows you to collapse or expand the display of individual projects. But a less well known feature of grouping is that it also acts as an edit facility for multiple items. For example, if your task view was grouped by **project**, you can drag and drop tasks between groups to change the **project**. This isn't restricted to one item at a time — you can select as many items as you want and drag them between groups, to change many tasks in one go. This can be used with almost any field on any item. For example, it could be used as a quick way to make many appointments in your calendar **Private**, or to bulk change **categories** on any Outlook item.

How to use grouping in Outlook views is described in Taskline's online help. On the **Contents** tab of the help, navigate to:

Getting the Most out of Outlook Views  
→ Customizing the Task Table View  
→ Grouping

## Purchase Taskline

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The free evaluation version of Taskline has nearly all the functionality of the paid-for fully featured version of Taskline, with just 2 limitations:

- Tasks in Outlook's calendar are only displayed for up to 6 days after the **First task starts at** date
- The **Copy Table to Clipboard** feature on the **Task Schedule Report** is not available

We hope that the free evaluation version of Taskline will demonstrate its value to you and that you will wish to purchase a license to use the fully featured version of Taskline, which has these limitations removed.

When you decide to buy, you immediately receive a temporary Product Key, which allows you to continue to use Taskline for a further 30 days. Then, approximately two weeks after purchase, you will receive a personalized product key, which will allow you to use the fully featured version of Taskline for the duration of the license you have purchased. Licenses that do not expire and allow you to use the fully featured version of Taskline indefinitely are available at reasonable cost.

Your purchase is risk free, because it comes with a 30-day, unconditional, money-back guarantee. We are confident that you will find Taskline to be an invaluable product that will quickly pay for itself in terms of improved control, organization and productivity.

## Pricing

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Please consult [www.taskline.com/buy.aspx](http://www.taskline.com/buy.aspx) for up-to-date prices, as these are subject to currency fluctuations and can vary.

Note that existing users of Taskline v4.1 or earlier can upgrade to Taskline v5 at a substantial discount. Again, the exact upgrade prices are detailed on our website. Discounts are also available for multiple licenses and educational use.

## Use Taskline's Rescheduling Technology in Your Own Application

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Please [contact us](#) about licensing Taskline's cutting-edge rescheduling technology for use in your own application!

## How to Order

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We accept company purchase orders, most credit and debit cards as well as payment by PayPal. To order online, please visit our secure payment facility at [www.taskline.com/buy.aspx](http://www.taskline.com/buy.aspx).

Full terms and conditions for purchase order acceptance are also set out on [www.taskline.com/buy.aspx](http://www.taskline.com/buy.aspx)

## How to Contact Us

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Please visit [www.taskline.com/contact.asp](http://www.taskline.com/contact.asp) for full contact information.

## Taskline Editions

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Taskline is available in 2 editions – Standard and Professional. Both Taskline editions have powerful features that enable you to automatically schedule your future work. However, Taskline Professional Edition offers extra task scheduling power and flexibility:

- Multiple named sets of **Working Hours** can be defined and different tasks can be scheduled to different **Working Hours**. For example, work tasks can be scheduled Monday to Friday during the day, and personal tasks can be scheduled for evenings and weekends.
- You can instruct Taskline to ignore all tasks which have been assigned particular **Working Hours**.
- Taskline allows travel time to be defined for appointments, so that tasks will not be scheduled during this time. Additionally, Professional Edition allows you to override this travel time on a per-appointment basis.
- Taskline Professional Edition adds **Max time per day** and **Max time per week** scheduling settings to a task. These can be used to spread a longer task out over several days or weeks, rather than working on a task exclusively until it is completed.

### Related Topics

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[Purchase Taskline](#)

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[Setting Your Working hours](#)

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[Using Different Working hours for Different Tasks](#)

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[Preparation and Travel Time on Appointments](#)

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[Recurring Tasks and Working on a Task for Only Part of the Day or Week](#)

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## Frequently Asked Questions

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If your question is not answered here, please consult the Taskline web site [www.taskline.com/FAQ.asp](http://www.taskline.com/FAQ.asp) for the latest version of this FAQ.

### Ordering

- What if I lose my Product Key?
- What if I lose my copy of Taskline?
- Will I be sent a boxed product?
- I have both desktop and laptop computers. Do I need to buy 2 licenses if I want to install Taskline on both computers?
- Do you give discounts for educational use?

### About Taskline

- Is a PDF version of the help file available?
- Where can I download the current or a previous version of Taskline?
- If I install Taskline, will anything else get installed as well?
- Is Taskline suitable for planning the work of a team?
- What is your upgrade policy?
- How can I report a bug?

### Requirements and Compatibility

- What are the system requirements for Taskline?
- What version of Outlook does Taskline require?
- Does Taskline work with Microsoft Exchange Server?
- Does Taskline work if my task and calendar information is stored on Outlook.com?
- Is there a version of Taskline for the Mac?

### Taskline Setup

- Microsoft Windows Defender stops Taskline Setup from starting
- During installation of the Taskline Outlook Add-In, you see the message "Deployment and application do not have matching security zones"
- During installation of the Taskline Outlook Add-In, the Microsoft Office Customization Installer gives the error "Customized functionality in this application will not work because the certificate used to sign the deployment manifest for Taskline v5 Outlook Add-In or its location is not trusted."
- The Microsoft Office Customization Installer fails with the error "Value does not fall within the expected range" or "Specified argument was out of the range of valid values"
- You get the error "Taskline is unable to communicate with Microsoft Outlook"
- Other problems installing the Taskline Outlook Add-In
- Visual Studio Tools for Office Installer fails with the error "The value of property 'type' cannot be parsed"
- You get other strange errors with Taskline or Taskline Setup, for example User Defined Field (UDF) errors

- How to repair any possible Outlook data corruption

### **Taskline Techniques**

- Sometimes I don't follow my Taskline schedule, to focus on an immediate unplanned issue. When this happens, I'd still like to keep a record of the work, both in the task list and the calendar. How can I do this?
- How do I define task order?
- How can I override Taskline's normal scheduling and schedule a task for exactly when I want to do it?

### **Task Scheduling**

- Nothing changes when I run Taskline. Why?
- Some tasks are not being rescheduled by Taskline. Why?
- Taskline runs slowly. Is there anything I can do to speed it up?
- Why are there gaps of unused time in my schedule?
- I am ordering my tasks by Natural Order, but they are getting scheduled in a completely different order. Why?
- Why are some tasks not scheduled in the order I specified?
- I have set a Due date on a task, but Taskline is ignoring this. Why?
- I don't understand why Taskline schedules some tasks the way it does.
- Can I have my tasks automatically scheduled on a regular basis?

### **Calendar Issues**

- I want to see my tasks in Outlook's calendar, but when I run Taskline, nothing appears. Why?
- Taskline seems to ignore some appointments in my calendar. This results in tasks being scheduled at times that clash with these appointments. Why does this happen?

### **Using Outlook with Taskline**

- I want to schedule my tasks in Natural Order but, in Outlook, when I try to drag tasks up or down the task list to change the order, nothing happens. Why?
- What if I want to track my tasks in a separate spreadsheet or other software?
- I want to export Taskline task information to another program. However, Outlook does not let me access the Taskline custom fields.
- Nothing happens when you click the Taskline button on Outlook's toolbar, or the Taskline buttons are missing from Outlook's Ribbon, or you get the message "Taskline's Outlook Add-In is not responding" when you start Taskline.
- How to repair any possible Outlook data corruption

### **Ordering**

#### **What if I lose my Product Key?**

No problem. Just visit our [Resend Product Key](#) page to have your registration information automatically resent.

#### **What if I lose my copy of Taskline?**

If you have Taskline 4.1 or earlier, [visit our Download page](#) and download another copy.

If you have Taskline 5, visit our [Resend Product Key](#) page to have your download link automatically resent.

#### [Will I be sent a boxed product?](#)

No. Taskline is downloaded from our web site. We have a policy of continuous product improvement and easy access to downloadable product updates makes this possible. It also keeps the software price down by removing packaging and shipping costs.

#### [I have both desktop and laptop computers. Do I need to buy 2 licenses if I want to install Taskline on both computers?](#)

With a single Taskline license you may install Taskline on up to three computers, provided that Taskline is used exclusively by you. So, in this circumstance, you need only buy one license.

#### [Do you give discounts for educational use?](#)

Yes. Discounts are available for students and teachers of legitimate educational institutions. [Please click here for further information.](#)

## About Taskline

#### [Taskline's online help file shows the table of contents, but the help pages are blank. Help!](#)

Sometimes Windows blocks compiled HTML help files, which is the type of help that Taskline uses. To unblock it, use Windows Explorer to open Taskline's install folder, which by default is:

```
C:\Program Files (x86)\ResultsWare\Taskline
```

Then right click the file **Taskline.chm** and click **Properties**. Select the **Unblock** checkbox or button, which is on the **General** tab. Then OK the **Properties** dialog.

#### [Is a PDF version of the help file available?](#)

Full online help is included with Taskline. However, if you prefer the user guide in a PDF format, you can download it here:

- ☐ [Letter sized paper](#)
- ☐ [A4 sized paper](#)

#### [Where can I download the current or a previous version of Taskline?](#)

[Please click here to access our download page.](#)

#### [If I install Taskline, will anything else get installed as well?](#)

Absolutely not, as long as you download Taskline from [www.taskline.com](http://www.taskline.com). Our Setup program installs Taskline and nothing else. There is absolutely no adware, spyware, or anything else of that nature.

#### [Is Taskline suitable for planning the work of a team?](#)

It depends on how your team works. Taskline is designed to help one person plan and manage their own work. It is not suited to one person planning the work of several others. In a team environment, each person would plan their own work using Taskline, perhaps keeping tasks in a central or shared location, such as on Microsoft Exchange Server.

#### [What is your upgrade policy?](#)

We are committed to continuously improving Taskline and intend to produce regular upgrades. Upgrades are priced at around 40% of the full license price. Upgrades are free if you have purchased Taskline within three months of an upgrade release.

We also produce regular minor updates to fix any bugs and keep the current version up to date. These updates are free.

#### How can I report a bug?

We are very keen to fix any problems you may find with our software. If you find a bug, we ask that you tell us about it, so that we may fix it. To report a bug, please click on the **Help and Support** button on the **Help / About** tab of Taskline's main dialog. Then choose the **Report a Bug** option and click **OK**.

## Requirements and Compatibility

#### What are the system requirements for Taskline?

System requirements are detailed at the end of the [Product Details](#) page.

#### What version of Outlook does Taskline require?

Taskline Version 5 requires the 32-bit or 64-bit versions of Microsoft® Outlook® 2010, 2013, 2016 or 2019, or Outlook that comes with Office 365.

Taskline Version 4 requires Microsoft® Outlook® 2007, or the 32-bit or 64-bit versions of Outlook 2010, 2013 or 2016, or Outlook that comes with Office 365.

#### Does Taskline work with Microsoft Exchange Server?

Yes, Taskline works well when Outlook is connected to Microsoft Exchange Server. But please note that Taskline has not been tested with non-Microsoft Exchange Server replacements, such as HP Open Mail or SUSE OpenExchange Server. We recommend that you do not install Taskline if you are using a non-Microsoft exchange server.

#### Does Taskline work if my task and calendar information is stored on Outlook.com?

Yes, Taskline will work fine.

#### Is there a version of Taskline for the Mac?

No, sorry. Taskline requires Microsoft Windows.

## Taskline Setup

#### Microsoft Windows Defender stops Taskline Setup from starting

Sometimes, Microsoft Defender SmartScreen blocks Taskline Setup. If this happen to you, [click here for advice](#).

#### During installation of the Taskline Outlook Add-In, you see the message "Deployment and application do not have matching security zones"

If you see this error message, do not use the "Run" or "Open" options to start Taskline Setup from within your browser. Instead, save Taskline5SetpDemo.exe to anywhere on your hard disk and run it from there.

#### During installation of the Taskline Outlook Add-In, the Microsoft Office Customization Installer gives the error "Customized functionality in this application will not work because the certificate used to sign the deployment manifest for Taskline v5 Outlook Add-In or its location is not trusted."

Some computers have had the ability to install Office Add-Ins disabled. We have a small application that fixes this, for all Office Add-Ins, not just Taskline's. Click the appropriate link below:

64-bit Windows "Trusted Sites" application.  
32-bit Windows "Trusted Sites" application.

**The Microsoft Office Customization Installer fails with the error "Value does not fall within the expected range" or "Specified argument was out of the range of valid values"**

If you see the above error while installing the Taskline Outlook Add-In, try the following:

1. Make sure Outlook is closed
2. Open Windows Explorer
3. Make sure that Windows Explorer is displaying hidden items. To do this, click the **View** tab, then select the **Hidden items** check box
4. Navigate to the folder "C:\Users\<Your Username>\AppData\Local\Apps"
5. Send the folder "2.0" to the Recycle Bin

Then try Taskline Setup again. If, after trying the above, you still see the error:

1. Navigate to "C:\Users\<Your Username>\AppData\Local"
2. Rename the folder "assembly"

Then try Taskline Setup again.

**You get the error "Taskline is unable to communicate with Microsoft Outlook"**

This error means 1 of 4 things:

- You are running Taskline Setup as a Windows Admin. That doesn't work, Taskline Setup needs to be run as a normal user
- You do not have Microsoft Outlook installed on your Windows computer. Taskline requires Outlook client software to be installed, as it is an Add-In for Outlook
- Something is interfering with Taskline Setup. See below
- There is a problem with some aspect of your Outlook installation. See below

### **Something is Interfering With Taskline Setup**

This is usually, but not always, Anti-Virus software. Try temporarily disabling your Anti-Virus software while Taskline Setup runs.

We have also had reports of Avast Cleanup causing this error in Taskline Setup. When Avast Cleanup was temporarily disabled, Taskline Setup ran smoothly.

### **None of the Above**

If you have tried all the above suggestions and the error is still happening, then it's probably down to an issue with your Office installation. Or, more specifically, with the COM programming interface to Office or Outlook. Try reinstalling Office. And if that doesn't help, look for the following:

Go to Control Panel -> Programs and look through the list. Do you see any different versions of Office or an Office application in there? To give you an idea of what to look for, these are examples of configurations we've seen that caused problems:

- You have Office 365 installed, but a copy of Excel 2013
- You have Office 365 installed and the standalone version of Skype installed (rather than the Skype that comes with Office 365)

- You have 64-bit Office installed, but also a 32-bit Office program or component. For example, Access Database Engine 32-bit
- You have 32-bit Office installed, but also a 64-bit Office program or component

Try, if possible, uninstalling the conflicting component or application.

Finally, if none of the above helps, we recommend downloading and running the [Microsoft Office Support and Recovery Assistant](#).

#### Other problems installing the Taskline Outlook Add-In

Taskline's Outlook Add-In uses a component called **Visual Studio 2010 Tools for Office Runtime**. The Add-In's Setup program should automatically download and install this, but sometimes it fails. You may see errors such as:

- The following Microsoft Office solution cannot be installed due to a general installer error
- The referenced assembly is not installed on your system
- Downloading file:/// C:/Program Files (x86)/ResultsWare/Taskline/<Your Username>/Add-In 2007/Taskline AddIn 2007.vsto did not succeed
- Setup has detected that the file: C:\Users\<Your Username>\AppData\Local\Temp\<Random name>.tmp\VSTOR40\vstor\_redist.exe has changed since it was initially published

If this happens to you, try downloading and installing [Visual Studio 2010 Tools for Office Runtime](#) separately from the Microsoft Download Centre.

#### Visual Studio Tools for Office Installer fails with the error "The value of property 'type' cannot be parsed"

Visual Studio Tools for Office Installer (which is started up by Taskline Setup to install the Outlook Add-In) gives the error "The value of property 'type' cannot be parsed. Could not load file or assembly Microsoft.Office.BusinessApplication.Fba ... etc?

Search your C: drive for the file "VSTOInstaller.exe.Config". Any you find, rename them. Then run Taskline Setup again.

#### You get other strange errors with Taskline or Taskline Setup, for example User Defined Field (UDF) errors

A conflict with another Outlook Add-In or some data corruption within Outlook is possible.

First, try temporarily disabling other Outlook add-ins:

1. Click **File** → **Options**.
2. Select the **Add-Ins** tab.
3. In the **Manage** drop down list, select **COM Add-Ins** and click **Go**.
4. Write down which items are checked and which are unchecked, then uncheck all non-Microsoft Add-ins and click **OK**. This will temporarily disable them.
5. Now shut down Outlook and retry Taskline Setup.
6. Finally, go back into the **Add-Ins** tab and **COM Add-Ins** dialog and put things back how you found them.

If disabling Add-Ins does not help, repair any possible data corruption (below).

#### How to repair any possible Outlook data corruption

Are you using a local PST (Personal Folders) file, or are your tasks on Exchange Server? If your Outlook data is on a server, Outlook will create a local OST file, which can sometimes get corrupted. We can get Outlook to recreate this file. First, locate the OST file:

1. In Outlook, right click on the root of the folder list, usually called your Mailbox name or your email address.
2. Click on **Properties** or **Date File Properties** in the popup menu.
3. Click the **Advanced** button. The filename will be shown on the dialog.

Then, rename this file. This will make Outlook create a new one:

1. Close Outlook.
2. Rename your OST file to anything you like.
3. Restart Outlook.

If instead you're using a PST file, try running a Microsoft program called ScanPST. This checks PST files for problems and can usually fix any it finds. To run this:

1. Close Outlook.
2. Use Windows Search to look for scanpst.exe. Typical locations for this program are:
  - 64-bit Outlook 2016 and 2019: C:\Program Files\Microsoft Office\root\Office16
  - 64-bit Outlook 2013: C:\Program Files\Microsoft Office 15\root\Office15
  - 32-bit Outlook 2010 on 64-bit versions of Windows: C:\Program Files (x86)\Microsoft Office\Office14
3. When you've found scanpst.exe, double click the file to run it.
4. Select your PST file by clicking the **Browse** button and then click the **Start** button to start the check. If you don't know the filename of your PST file:
5. In Outlook, right click on the root of the folder list, usually called "Personal Folders" or simply "Outlook".
6. Click on **Properties** or **Date File Properties** in the popup menu.
7. Click the **Advanced** button. The filename will be shown on the dialog.

## Taskline Techniques

**Sometimes I don't follow my Taskline schedule, to focus on an immediate unplanned issue. When this happens, I'd still like to keep a record of the work, both in the task list and the calendar. How can I do this?**

We recommend this:

Create a new appointment in your Outlook calendar that represents the unplanned (and now completed) work. Then right click on the appointment and select **Create task** from the popup menu. A task form will open. Set **Status** to **Completed** then **Save & Close** the task.

### How do I define task order?

To define task order, you should not use constraints, such as a **Finish on or before** constraint. Rather, on the **Tasks** tab of Taskline's dialog, there is the section entitled **Schedule tasks in the following order**. That is how to define task order. Whatever method you choose, you then set the corresponding information on the task appropriately. Most people use **Priority (A1)** or **Natural Order**. It is then just a matter

of setting the appropriate **Priority (A1)** value on a task, or dragging tasks up and down the task list to set their **Natural Order**. Things like **Finish on or before** constraints only come into play if you have a deadline to meet. And, even if you have a deadline, you only need to select other tasks if the deadline applies to several tasks, not just one.

For further information on task ordering, please see [Defining the Order in Which Tasks are Scheduled](#).

**How can I override Taskline's normal scheduling and schedule a task for exactly when I want to do it?**

You can place a constraint on a task to have it scheduled to a specific date and time. On the Taskline Tab of the task form in Outlook, set the **External constraint** to **Start on** or **Finish on**. Then enter a date to the right. If you want to lock down the task to the exact minute, enter a time too. You can also use constraints for deadlines – a **Finish on or before** is generally ideal for this.

## Task Scheduling

**Nothing changes when I run Taskline. Why?**

Check that you are scheduling the folder that contains your tasks. Be especially careful if you have several folders with the same name. The tasks folder that Taskline will schedule is shown on the **Schedule tasks in...** setting, which is on the **Tasks** tab of Taskline's main dialog.

If you are using more than one Outlook Data Store (e.g. PST file), check that you haven't selected task and/or calendar folders in the wrong data store.

**Some tasks are not being rescheduled by Taskline. Why?**

Taskline offers a lot of flexibility for including or excluding tasks from the scheduling process. Below are all the reasons why some tasks might not be being scheduled:

- Check the **Schedule tasks in...** setting on the **Tasks** tab of the **Taskline Settings** dialog. Is this definitely the same folder that contains your Taskline tasks? Be especially careful if you have several folders with the same name
- Are some of your tasks in Outlook subfolders? If so, do you have the Taskline **Include subfolders** check box selected? This is on the **Tasks** tab of the **Taskline Settings** dialog.
- On the **Taskline** tab of the task form in Outlook, check that the **Schedule this task** check box is selected
- Is the task Complete? Specifically, does the task have its **Status** set to **Completed**?
- Even if the task is not marked as **Completed**, it could be that there's no work left on the task. On the **Taskline** tab of the task form in Outlook, is **Work Remaining** shown as zero?
- Is task **Status** set to **Deferred** or **Waiting on Someone else**?
- Does the task have a **Project** assigned that is not being scheduled? Specifically, check the **Project** field on the **Taskline** tab of the task form in Outlook to see which **Project** is assigned to a task. Then check the **Projects** tab on the **Taskline Settings** dialog. Is the check box next to the Project name ticked?
- Does the task have **Working Hours** assigned that are not being scheduled? Specifically, check the **Working Hours** field on the **Taskline** tab of the task form in Outlook. Then check the **Working Hours** tab on the **Taskline Settings** dialog. Is the **Schedule tasks that have been assigned these hours** check box selected?
- Has the task been delegated to someone else? Taskline doesn't schedule delegated tasks (because you're not doing them, someone else is)



- Are all the **Calendar Task Entries** in Outlook's calendar for this task **Pinned**? Pinning allows you to manually override some or all of a task's scheduling. It can be that there is no unpinned work left for Taskline to schedule. You can check a task's **Calendar Task Entries** by right clicking on the task and clicking the **Open Calendar Task** option.
- Taskline will only schedule standard Outlook tasks. Specifically, those tasks with their **Message Class** set to **IMP.Task**. Some Outlook Add-Ins change the **Message Class** of Outlook items. To check this, add a **Message Class** column to the task table view in Outlook. **Message Class** can be found in the **All task fields** section of the **Outlook Field Chooser**

#### Taskline runs slowly. Is there anything I can do to speed it up?

The following characteristic can make Taskline run slowly:

- Having your Taskline tasks – and especially the tasks that Taskline creates in your Outlook calendar – on a remote Outlook store, such as Exchange Server or Outlook.com. If you can, use a local PST file for the Outlook folders that contain your Taskline tasks and **Calendar Task Entries**, it will run much faster
- Creating lots of Taskline task entries in Outlook's calendar. This can slow Taskline down considerably but can be resolved by limiting for how many days in the future **Calendar Task Entries** are created. Doing this also helps you to focus on the next few days work, rather than being distracted by work several weeks away. You set this feature by using the **Limit tasks in Calendar to first [ ] days** setting, which is on the **Calendar** tab of the **Taskline Settings** dialog. When you use this setting, all your tasks are still scheduled. For example, they will have their **Scheduled Start** and **Scheduled End** dates recalculated
- Having a lot of recurring appointments
- Having a lot of recurring appointment exceptions (these can slow Taskline down significantly)
- Having a lot of recurring tasks
- Using the **Show list of attachments** Advanced Option
- Ordering tasks by a custom field
- Using the **<TaskCompanies>** Calendar Task Entry Subject token

#### Why are there gaps of unused time in my schedule?

- Do you have any **All day events** in your calendar? Taskline will not schedule work on days that have **All day events** on them, unless they have **Show time as** set to **Free**.
- Do you have a filtered calendar view? Are you sure that you can see all of your appointments? Taskline won't schedule tasks where there are appointments already occupying that time.
- Taskline allows you to specify up to 2 Outlook folders that contain your appointments. This is the **And also in** setting on the **Calendar** tab of the Taskline Settings dialog. Check whether there are appointments in your 2nd Outlook folder that are responsible for the gaps.
- Check your **Task can be split** and **Minimum split** settings. Perhaps the gaps in your schedule are too small to be utilized? For example, a 3 hour task that cannot be split will not be able to use any part of a free 2 hours time slot. The **Default minimum task split** setting, on the **Options** tab of Taskline's dialog, also plays a role here. You can check whether the task split settings are resulting in unexpected gaps by telling Taskline to temporarily ignore these settings. To do this, click the **Advanced Options** button on the **Options** tab of Taskline's dialog. Then select the

**Ignore task split settings and allow tasks to be split without restriction** check box.

- Gaps can also be caused by travel time on appointments. Check the **Default time allowances before and after an appointment** settings, which are on the **Calendar** tab of Taskline's dialog. Also check, for Taskline Professional Edition, whether any individual appointments have overridden these settings using the "{30m/1h}" style on the appointment subject.
- Taskline allows you to specify up to 2 Outlook folders that contain your appointments. This is the **And also in** setting on the **Calendar** tab of the Taskline Settings dialog. Check whether there are appointments in your 2nd Outlook folder that are responsible for the gaps.

**I am ordering my tasks by Natural Order, but they are getting scheduled in a completely different order. Why?**

- Check that you have **Order by** set to **Natural Order Descending**.
- Check that you can drag tasks up and down Outlook's task list using the mouse. If you can't, then your tasks are not in Natural Order.
- Are you looking at the Outlook Tasks folder selected in Taskline, or are you looking at Outlook's **To-Do list**? The **To-Do list** uses a different Natural Order to the Tasks folder. Taskline's Natural Order does not work with the **To-Do list**. You have to use Natural Order in your Outlook Tasks folder. The **To-Do list** contains tasks and emails from all your Outlook folders, whereas Taskline only schedules tasks in whatever folder you have selected on the Tasks tab of Taskline's main dialog.
- It's possible that your Outlook view is corrupt. Try creating a new one. How to do this is documented in Taskline's online help. See the chapter called **Getting the Most out of Outlook Views**.
- Check task constraints. **Start on**, **Start on or after**, **Finish on** and **Work between Constraints** can stop tasks being scheduled earlier than would otherwise be possible and hence can force gaps into schedules. You can check whether task constraints are resulting in unexpected gaps by telling Taskline to temporarily ignore them. To do this, click the **Advanced Options** button on the **Options** tab of Taskline's dialog. Then select the **Ignore task constraints** check box.

**Why are some tasks not scheduled in the order I specified?**

Tasks do sometimes get scheduled out of order. There are several reasons for this:

- Firstly, check that you are looking at the Outlook Tasks folder selected in Taskline. Taskline does not support Outlook's To-Do Bar, which uses a different ordering system to the Tasks folder.
- Task constraints, such as a **Finish on** constraint, override task order, but only if this is necessary to make sure that the constraint is met.
- A task with a missed **Constraint**, or a recurring task that has missed its recurrence date, is regarded by Taskline as overdue. Overdue tasks take priority over all others.
- Different tasks assigned different **Working Hours** can get scheduled out of order.
- If you have turned off **Task can be split** or if you have set **Minimum split** on a task, then it's possible that a higher priority task isn't able to use the first available free time slot, because it's too small. Thus the task will get scheduled in a later time slot, leaving the earlier one free for another (perhaps lower priority) task.

**I have set a Due date on a task, but Taskline is ignoring this. Why?**

Taskline doesn't actually take a task's **Due** date into account when scheduling, mainly

because many people prefer Taskline to actually set the **Due** date when it runs. However, you can certainly specify a date that the task must finish on or by, for example to meet a deadline. You do this by setting up an external constraint, which is simply a matter of selecting the **Finish on or Before** constraint type from the **External constraint** drop down list on the Taskline task form in Outlook.

[I don't understand why Taskline schedules some tasks the way it does.](#)

If the task reschedule is producing results that you don't understand, try selecting one or more of the **Understanding Taskline** options, which are on the **Advanced Options** dialog.

[Can I have my tasks automatically scheduled on a regular basis?](#)

Yes, you can set up the Windows® task scheduler to do this for you. See [Background Task Scheduling](#) for more information.

## Calendar Issues

[I want to see my tasks in Outlook's calendar, but when I run Taskline, nothing appears. Why?](#)

- On the **Calendar** tab of Taskline's main dialog, **Task entries in the calendar** section, check that you have selected the **Create for tasks that are Not Started or In Progress** option.
- Check that the folder chosen to contain calendar task entries is the one you think it is. This is the **Write task entries to** option on the **Calendar** tab of Taskline's main dialog. Be especially careful if you have several calendar folders with the same name.
- If you are using more than one Outlook Data Store (e.g. PST file), check that task entries aren't being written to a calendar folder in the wrong data store.
- Calendar task entries are not created for tasks with a Total Work of zero unless you have the **Create all day events for milestones** option enabled on the **Calendar** tab of the Taskline dialog. Total Work is your best guess at how long you think each task will take. If it is set to 0, the task is called a milestone, and it will start and end at the same time. Milestones represent significant events, or goals, in your task list.
- It is possible that the task has been created in the calendar, but at a date you did not expect. To check, open the task in Outlook. Go to the **Taskline tab** of the task form in Outlook and note the **Scheduled start** date. Now check the calendar at this date to see if the Taskline created calendar task entry exists.

[Taskline seems to ignore some appointments in my calendar. This results in tasks being scheduled at times that clash with these appointments. Why does this happen?](#)

Appointments in Outlook have a **Show time as** setting which is one of **Free**, **Working elsewhere**, **Tentative**, **Busy** or **Out of office**.

On the **Tasks** tab of the Taskline Settings dialog, you set **Working Hours** to tell Taskline what hours you normally work during the week. **Working Hours** also allow you to either ignore or take into account Outlook appointments based on their **Show time as** settings. So it's possible, for example, you have an Outlook appointment with **Show time as** set to **Tentative** and also Taskline's **Working Hours** have been configured to ignore **Tentative** appointments.

## Using Outlook with Taskline

[I want to schedule my tasks in Natural Order but, in Outlook, when I try to drag tasks up or down the task list to change the order, nothing happens. Why?](#)

To display tasks in their **Natural Order** in Outlook:

- Click **View** ribbon → **View Settings** button to display the **Advanced View Settings** dialog. Then use the **Sort** and **Group By** buttons on this dialog to set the

**Sort Items by** and **Group items by** fields to **none**.

Having your tasks displayed in **Natural Order** and scheduled in **Natural Order, Descending** is often the most convenient way of working, because the order you see your tasks in is the order that Taskline will schedule them in. It's also easy to change this order by dragging the tasks up and down the task list.

[What if I want to track my tasks in a separate spreadsheet or other software?](#)

- Outlook allows you to export your tasks to a comma separated values file. In Outlook, click **File** menu → **Options** → **Advanced** tab → **Export** button. To export the Taskline custom fields, see the FAQ entry below.
- Taskline also generates a **Task Schedule Report**, which has an option to show details on every task. You can then click the report's **Copy Table to Clipboard** button and paste the results directly into, for example, a spreadsheet.

[I want to export Taskline task information to another program. However, Outlook does not let me access the Taskline custom fields.](#)

Outlook does not support the export of custom fields. However, you can get round this to a large extent by creating a task table view showing the fields you wish to export, selecting the tasks you wish to export, and then right clicking and selecting **Copy**. The task table view is then copied to the clipboard as tab separated text which can, for example, be pasted straight into Excel.

See [Getting the Most out of Outlook Views](#) for instructions on customizing the Outlook task table view.

[Nothing happens when you click the Taskline button on Outlook's toolbar, or the Taskline buttons are missing from Outlook's Ribbon, or you get the message "Taskline's Outlook Add-In is not responding" when you start Taskline.](#)

It's possible that Taskline's Outlook Add-In has been disabled. If so, re-enable it:

- Click **File** → **Options**
- Select the **Add-Ins** tab
- In the **Manage** drop down list, select **Disabled Items** and click **Go**
- If Taskline's Add-In is listed, re-enable it. Then **Close** the **Disabled Items** dialog
- In the **Manage** drop down list, select **COM Add-Ins** and click **Go**
- Select the check box for **Taskline Outlook Add-In**
- Click OK to close the **COM Add-Ins** dialog



If this doesn't help, see [Taskline Outlook Add-In is Not Responding](#)

[Return to top of page](#)

## Customer Support

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Before contacting us, you might get a quick answer when you check the following information:

- This online Help. You can click the **Index** or **Search** tab in the online Help to find an answer to your question
- [The Support FAQ](#)
- Popup help. For information about options and settings on any dialog, click the Question Mark  button at the top right hand corner of the dialog and then click a dialog option
- The online Help for the Taskline task form in Outlook®. To access this, open a task in Outlook and click the  icon on the **Taskline** tab of the form

## Ways of Requesting Assistance

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To email us, click the **Help and Support** button on the **Help / About** tab of the Taskline Settings dialog



[Support Form](http://www.taskline.com/supportForm.asp) ([www.taskline.com/supportForm.asp](http://www.taskline.com/supportForm.asp))



+44 7782 586 566

## Office Hours, Monday to Friday

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UK Time	10:30am to 5:00pm
Central European Time	11:30 to 18:00
Eastern Time	5:30am to 12:00pm
Pacific Time	2:30am to 9:00am

We can be available to chat outside these hours by prior arrangement

## Taskline 5 Software License Agreement

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Taskline 5 is available in 2 versions: an evaluation version, which has some limitations, and a fully featured paid-for version.

You may install and use the evaluation version of Taskline 5 indefinitely, on any number of computers, free of charge. You are allowed to make any number of copies of the evaluation version of Taskline and its associated files. You can give a copy of the evaluation version of Taskline to anyone, providing that no additional fee is charged and that the distribution files are not modified in any way.

Anyone distributing any version of Taskline for any kind of reward or remuneration must first contact ResultsWare Limited for authorization.

The fully featured version of Taskline is not free; you must buy a license to use it. When you purchase a license to use the fully featured version of Taskline, you will be supplied with a copy of the fully featured Taskline software, a personalized product key and other associated registration information. Depending on your purchase, said product key might remain valid indefinitely, or it might expire after a set period. You may only use the fully featured version of Taskline while said personalized product key remains valid and has not expired. Your license to use the fully featured version of Taskline is only valid while your personal product key is valid and has not expired.

The licensed, fully featured version of Taskline may be installed on up to three computers, provided that each Taskline license is used exclusively by a single person, or it may be installed on exactly one computer and used by one or more persons, but NOT both. This is strictly a single use license.

You may not utilize any registration information that you have not legitimately purchased.

You may not install the fully featured version of Taskline for access through any network, without first obtaining a license for each computer that will access Taskline over that network, regardless of whether they are accessing Taskline concurrently or otherwise.

You may not alter or reverse engineer any version of Taskline or its help and other support files in any way. You may not give, distribute, rent, lease, or lend the fully featured version of Taskline, nor may you give, distribute, rent, lease or lend any Taskline product key.

ResultsWare Limited warrants that Taskline will perform substantially as described in its documentation and that Taskline is reasonably but not wholly free of defects. For up to three months after you purchased the fully featured version of Taskline, ResultsWare Limited will refund in full the purchase price of the license if Taskline does not conform to this warranty. However, you use Taskline at your own risk. ResultsWare Limited will not be liable for any data loss, damages, loss of profits or loss of any other kind, direct or consequential, which may result from the use of this software.

This agreement shall be governed and construed in accordance with the Laws of England. By installing and using Taskline you accept all the terms and conditions of this license agreement. If you do not agree with anything in this license, you must remove Taskline from your storage devices and cease to use the software.

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## What's New

For the latest What's New? information, please visit [www.taskline.com/whatsNew.asp](http://www.taskline.com/whatsNew.asp)

Version 5.0.42

September 7, 2020

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- This version fixes an issue saving Taskline Settings on IMAP stores.

Version 5.0.40

September 4, 2020

- 
- **Import Tasks** now allows default values for **Priority (Low/Normal/High)** and **Priority (A1)** to be specified.

Version 5.0.37

August 10, 2020

- 
- The **External constraint**, **Working hours** and **Show as** combo boxes on the Taskline task form in Outlook had no blank line, so you couldn't remove these settings. This is now fixed.

Version 5.0.34

July 9, 2020

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- There is a new option to change **Show As** on calendar task entries when a task is made **Complete**. This compliments the setting that allows you set **Show As** on **Not Started** calendar task entries.
  - You can now order tasks by **Start** date, as well as by **Due** date

Version 5.0.26

June 16, 2020

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- The Taskline 4 options to **Move completed tasks** to a different Outlook folder and to **Delete completed occurrences of recurring tasks** have been reinstated in Taskline 5.

Version 5.0.15

May 12, 2020

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- Recurring appointments are now read in more quickly.
  - The yearly and monthly "on the 1st/2nd/3rd/4th/Last weekday/weekend day of a month" types of recurring appointments are now supported by Taskline.
  - Support has been improved for storing Taskline settings when only an IMAP account is available.

## Taskline Version 5

April, 2020

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- Taskline 5 has been extensively re-engineered and now runs substantially faster, typically twice as fast as Taskline 4.1 and earlier.
  - Taskline 5 works with Outlook folders to support a full task hierarchy, with summary tasks. [More](#)



- Taskline Settings are now stored in the same place as Outlook tasks. So now the same tasks and settings information can be accessed from any computer. With Taskline 4 and earlier, Taskline's settings were stored in the Windows Registry on the local computer.
- There are now 2 pre-installed Outlook custom views – **Taskline A1** and **Taskline Nat Ord** – optimized for viewing Taskline tasks.
- Your appointments can now be in 2 Outlook Calendar folders. This is useful if, for example, you have different Work and Home calendars.
- You can now control how each type of appointment (**Busy**, **Tentative** etc) influences the task reschedule for each set of **Working Hours**. So, for example, some types of tasks could be scheduled during **Out of Office** appointments.
- There is a new **Open Calendar Tasks** right-click menu option for Taskline tasks.
- The **Summary of Task Schedule** report has been completely rewritten:
  - It now shows a detailed report of all tasks with optional sorting, grouping and filtering.
  - The report can summarize your schedule by **Folder**, **Project**, **Category** or **Working Hours**.
  - The report optionally includes Completed work, not just future work as with Taskline 4.1 and earlier.
- With Taskline v4.1, there were 2 Outlook Add-Ins. Now there is just one, called "Taskline Outlook Add-in". This should improve reliability.
- **Taskline Standard Edition** now supports the same flexible working week definition as **Taskline Professional Edition**, so that for example you can work different hours on different days, although **Standard Edition** only supports a single **Working Hours** definition.
- Outlook **Task Import** has been enhanced so that you can now import many different task settings, not just **Subject**.
- Taskline now requires Outlook 2010 or later.
- You can now license Taskline's cutting-edge rescheduling technology for use in your own application. Please [contact us](#) for more information.

## Feature Differences Between Taskline 4 and Taskline 5

- The Taskline 4 settings:
  - **Move completed tasks to...**
  - **Delete completed occurrences of recurring tasks**
 Have been removed from Taskline 5. This is because:
  - Taskline 5 now supports a full task hierarchy. Generally, in a hierarchy, it is better to leave items in their original folders. Moving completed tasks that were originally in different folders into the same folder would undermine the hierarchy.
  - The Task Schedule Report now reports information on completed tasks, such as **Work Done** and **Work Remaining**. It can't do this properly if completed tasks have been moved to a different folder.
- The way **Order by Due date** works has been changed. With Taskline 4, not only were tasks ordered by **Due date**, but Taskline also tried to make sure that tasks were completed on or before the **Due date**. With Taskline 5, **Order by Due date** now works the same way as the other **Order by** fields. It is just used for task ordering. This makes things simpler and consistent. Task **Constraints** can still be



used if you need a task to finish on or before a certain date.

#### **What Was New in Previous Taskline Versions**

## If You Work Different Hours on Different Days

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When we tell Taskline or Outlook that a task lasts for 1 day, or for 1 week, how many hours does that mean? Taskline needs to know the number of working hours in a day and in a week. Both Outlook and Taskline use this information to convert days and weeks to hours, and vice versa. These settings are set in Outlook:

- If you are using Outlook 2007, click **Tools** menu → **Options** → **Other** tab → **Advanced Options** button, to display the **Advanced Options** dialog.
- If you are using Outlook 2010 or 2013, click **File** (or **FILE** in Outlook 2013), then **Options** in the left hand bar, then **Tasks** in the left hand bar.

If you work the same hours each day, the hours you work each day and week are obvious. However, if you work different hours on different days, what values should you use?

For **Working hours per week**, add up all the hours you actually work in a week. To set a suitable value for **Working hours per day**, consider a task that takes one day to complete. Then ask yourself how many hours that task would take to complete – this is the setting you should use for working hours per day. Generally, if you work the same hours on most days, enter that many hours. If you work different hours almost every day, enter the number of working hours per week divided by the number of days you work.

Example 1. You work 9am to 6pm Monday to Thursday, and 9am to 4pm on a Friday, with a 1pm to 2pm lunch break each day:

- You could enter the **Working hours per day** as either 8 (your Monday to Thursday hours), or 7.6 (your average working day). 8 is probably the better choice.
- Enter the **Working hours per week** as 38.

Example 2. You work 9am to 5pm Monday to Friday, and 9am to 12pm on Saturday, with a 12:30pm to 1:30pm lunch break Monday to Friday:

- Enter **Working hours per day** as 7.
- Enter **Working hours per week** as 38.



### Further Considerations for Taskline Standard Edition

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If you are using Taskline Professional Edition, Taskline directly supports the working weeks in the above examples. However, users of Taskline Standard Edition can sometimes use recurring appointments as workarounds when you work different hours on different days.

Example 1. You work 9am to 6pm Monday to Thursday, and 9am to 4pm on a Friday, with a 1pm to 2pm lunch break each day:

- Enter your working week as Monday to Friday.
- Enter **I start work at** as 9am and **I stop work at** as 6pm.
- Enter a daytime break **From** 1pm **to** 2pm.
- Enter an appointment in the Outlook calendar from 4pm to 6pm on a Friday. Set this to recur every Friday. You might wish to name it something like "Non working time."

Example 2. You work 9am to 5pm Monday to Friday, and 9am to 12pm on Saturday, with a 12:30pm to 1:30pm lunch break Monday to Friday:

- Enter your working week as Monday to Saturday.
- Enter **I start work at** as 9am and **I stop work at** as 5pm.
- Enter a daytime break **From** 12:30pm **to** 1:30pm.
- Enter an appointment in the Outlook calendar from 12pm to 5pm on a Saturday.  
Set this to recur every Saturday, and name it something like "Non working time."

#### Related Topics

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[Setting the Working Week](#)

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[Recurring Appointments](#)

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## Using Taskline with FranklinCovey® PlanPlus

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Taskline is compatible with FranklinCovey® PlanPlus versions 1 thru 6.

When using both PlanPlus and Taskline, there are a few minor issues to note:

- Taskline and PlanPlus use the same **Priority (A1)** setting on a task. Taskline allows values for **Priority (A1)** ranging from A00 to Z99. However, for maximum compatibility with PlanPlus, you should restrict your use of **Priority (A1)** values to the range A00 to C99.
- By default, Taskline will not schedule PlanPlus Masters tasks, which are tasks without a Due date, that are in the default **Tasks** folder. However, in other tasks folders, tasks with Due dates are scheduled. You can have Taskline schedule PlanPlus Masters tasks by selecting the **Schedule PlanPlus Masters tasks** option, which is on the **Advanced Options** dialog.
- The **Require that all tasks are assigned a category** option, on the **Advanced Options** dialog, is not supported. You cannot force tasks to have a category assigned when PlanPlus is installed.
- The PDA sync software that comes with PlanPlus will not synchronize Taskline tasks.

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### Related Topics

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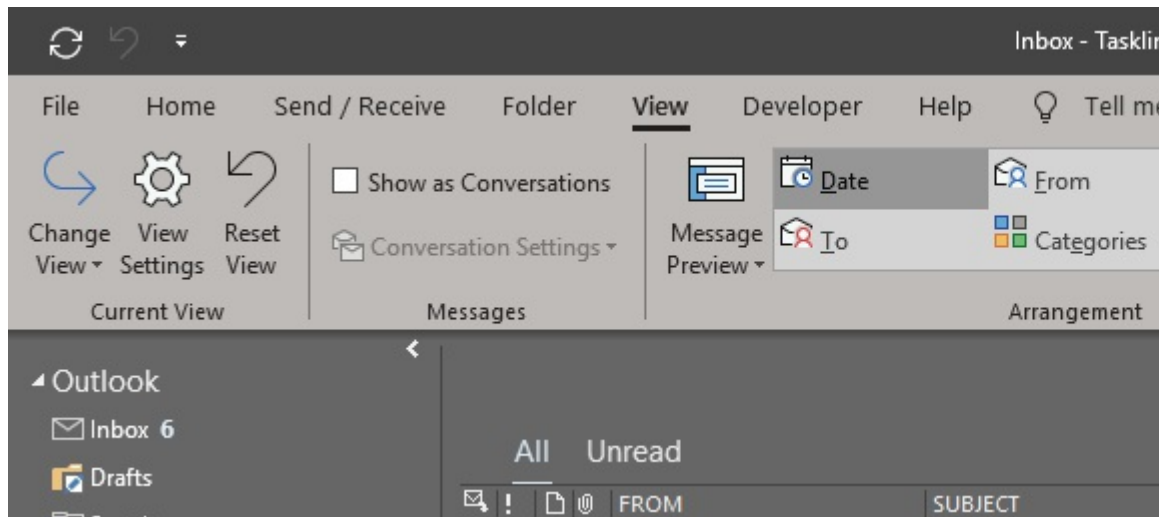
[Advanced Options Dialog](#)

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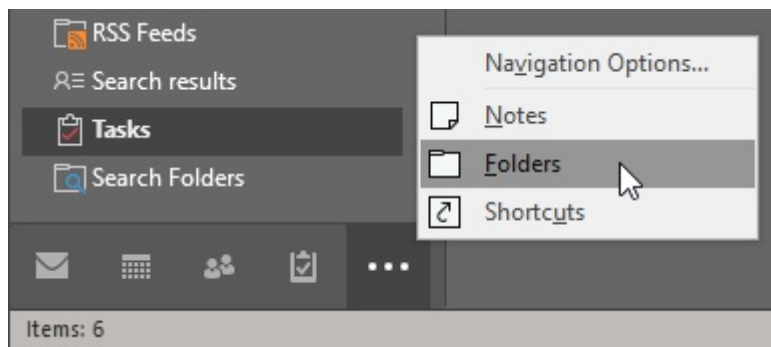
## Display the Folder Pane in Outlook

The **Folder Pane** displays all Outlook folders, in their natural hierarchy, in a panel on the left. It allows you to switch between different Outlook folders quickly and easily as well as work with Taskline to support a full task hierarchy. You can turn this on by:

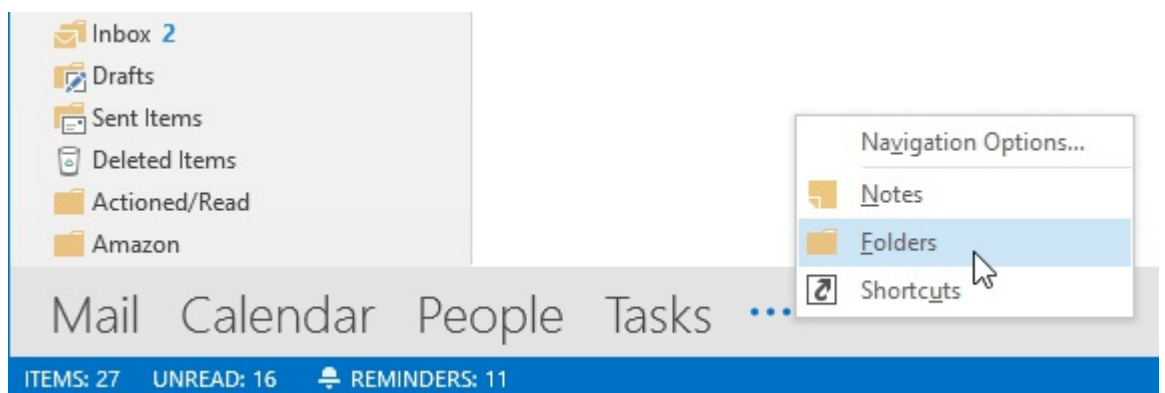
- Outlook 2016 and Outlook 2019 – click **View** tab → **Folder Pane** → **Normal**



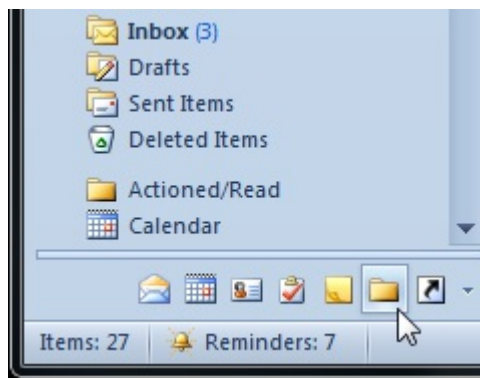
Then, on the **Navigation Pane**, click the **Folders** icon:



- Outlook 2013, click '...' at the bottom of the main window and then click **Folders** on the pop up menu:



- Outlook 2010, click **View** ribbon → **Navigation Pane** → **Normal**. Then click the **Folder List** icon  at the bottom of the **Navigation Pane**:





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Outlook® and Windows® are registered trademarks of Microsoft® Corporation

## Taskline Shortcut Key


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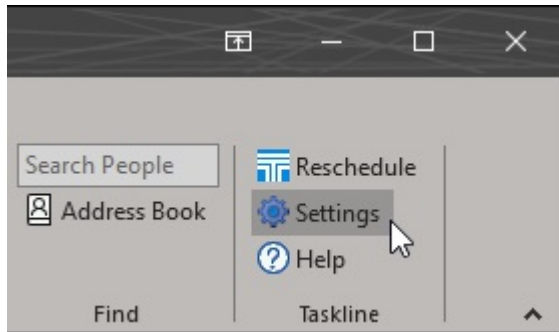
You can start Taskline by using the **Ctrl + Alt + F5** shortcut key, if you selected this option when you ran Taskline Setup. If you didn't select the option, and you would like to use the shortcut key, run Taskline Setup again (do not uninstall first).




## Start Taskline by Clicking the Taskline button

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To display the Taskline Settings dialog, click the  **Settings** button in the **Taskline** group of Outlook's **Home** tab:

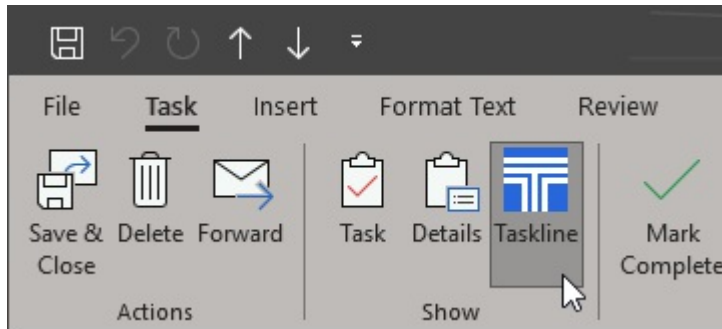


### Tip

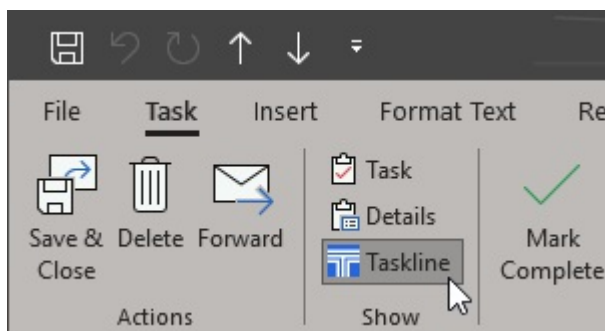
- You can have Taskline schedule your tasks immediately, without showing the dialog first, by clicking the  **Reschedule** button

## Displaying the Taskline Tab of the Task Form in Outlook

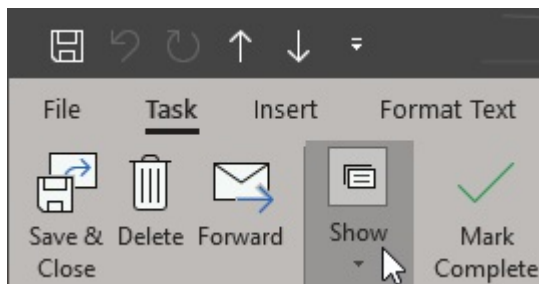
Click the Taskline icon in the **Show** group of the **Task** ribbon to display the Taskline tab:



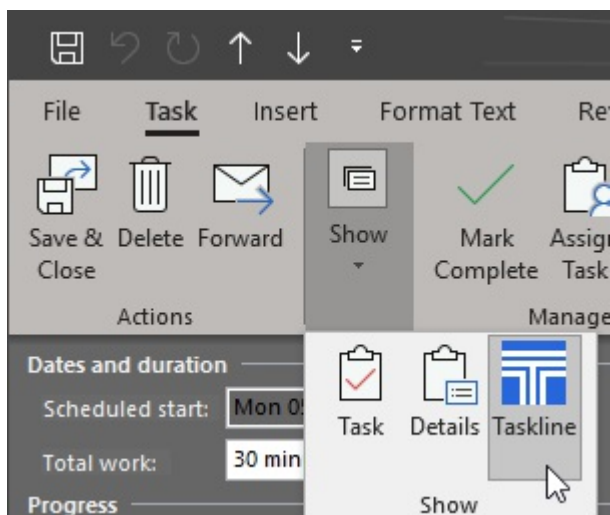
If your Outlook task window is narrow, you'll see slightly smaller icons:



If your Outlook task window is too narrow, the **Show** group on the task ribbon may display collapsed:



You'll need to either make your task window wider, or click the down arrow to expand it:





## Open Folder and Create Folder Task Right Click Menu Commands

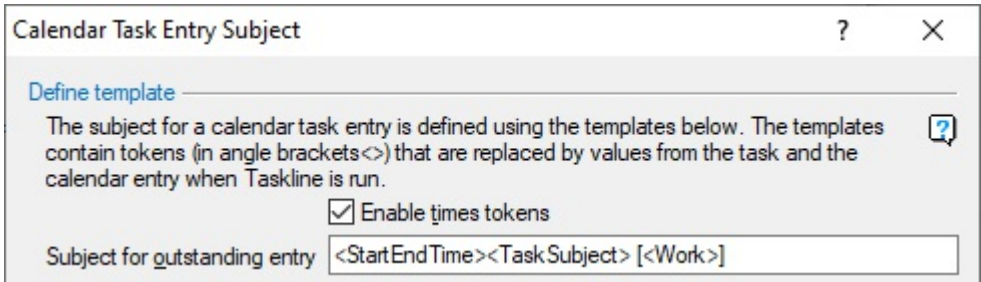
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When using the right click menu on a task, clicking on the task *first*, then right clicking as a *second action*, is *most important!* There is an issue with Outlook that causes Outlook to crash if you right click on a task and select the **Open Folder** or **Create Folder Task** options when another task is still selected. It's important to select the task or **Folder Task** you want to use first, with a left click, then right click the same task and choose the appropriate command. There's nothing we can do about this problem, but being able to create and open folders from within the task list view is very useful, so we've left these features in.

# Displaying Times for Task Entries on the Calendar



Outlook does not display times on the calendar's Week and Work Week views. If you want your calendar task entries to display times, use the **<StartTime>** token and select the **Enable times tokens** option:



## Related Topics

- [Giving Calendar Task Entries Colors](#)
- [Showing Your Tasks in Outlook's Calendar](#)
- [About Appointments](#)
- [Calendar Views](#)
- [Tokens](#)

## Uninstall Procedure

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If you use Exchange Server, you must connect to your network before uninstalling Taskline.

To uninstall Taskline, do one of the following:

1. On Windows 7, click on the Windows **Start** menu, then click the **Uninstall Taskline** entry in the **Taskline** sub-menu
2. On Windows 8 and 8.1, click the **Uninstall Taskline** entry on the **Start** or **Apps** screen
3. On Windows 10, click on the Windows **Start** menu, then the **Settings** icon, then **Apps**. Locate and select **Taskline Outlook Task Scheduler v5**, then click the **Uninstall** button
4. On all Windows versions, open Windows **Control Panel**. Then:
  - If you are in **Category** view, click **Programs** then **Uninstall a Program**
  - If you are in **Icons** view, click **Programs and Features**
  - Select **Taskline Outlook Task Scheduler v5** from the list, and click the **Uninstall** button

### Important

- You will see an entry in the list of installed programs on **Control Panel** or **Apps & features** for **Taskline v5 Outlook Add-In**. Do not Uninstall this. If you do, you will end up with a partially uninstalled version of Taskline. Always only Uninstall **Taskline Outlook Task Scheduler v5** and this will also uninstall the Outlook Add-In for you.

### Tip

- If you wish to reinstall Taskline, you do not generally need to uninstall first.

# What Was New in Previous Taskline Versions

Taskline Version 4.1


December, 2014

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## New Features Specific to Outlook 2013

- The Calendar Task Entry context (right click) menu now works on Outlook 2013 too. Commands available are **Open Task**, **Complete**, **Whole Task is Complete** and **Pin/Unpin**.
- You can set **Show time as** for calendar task entries to **Working Elsewhere**.
- There is a new **Advanced Option – Ignore 'Working Elsewhere'** appointments.

## New Features for all Versions

- There are 2 new right click menu options for standard Outlook appointments: **Create Task** and **Create Task and Pin**. These enable you to do some planning in the calendar and then easily convert appointments into Taskline tasks. The appointment is itself converted into a Taskline calendar task entry, like those created by Taskline when it runs.
- There is a new **Create Task** right click menu option for Outlook emails, notes and contacts. This creates a new task from the item, leaving the original Outlook item unchanged.
- Pinned calendar task entries that are **Not Started** and have an **End** date on or before the **First task starts at** date (i.e. those pinned items that are in the past) are now automatically unpinned and rescheduled.
- The **Taskline** section of the ribbon in Outlook has a new  button to display Taskline's online help.
- Outlook **Label** names have been removed, only **Label** colors are now shown and the word **Label** has been replaced by **Color**. This gives a cleaner and simpler interface.
- Calendar task entry colors and subjects now update when you click **Apply** – there's no longer a need to reschedule to have them updated.
- You can now have up to 9 day time breaks, up from the 4 previously supported.
- There is a new **ClearContext project compatibility** advanced option. If enabled, Taskline reads and writes task **Project** information from and to the Outlook **CC-TopicName** custom field, instead of the usual **Project** UDF.

## Tasks in the Calendar Can Now be Colored Based on New Task Attributes

- **Overdue** so you can color overdue tasks differently.
- **Pinned** so you can color pinned and unpinned tasks differently.
- **Priority (A1)** letter, so for example **A** tasks can be colored differently to **B** tasks.
- There is a new color type on the **Define Colors** (formally Define Labels) dialog such that you can now prevent the creation of calendar task entries for tasks with certain attributes.



## The Following Bugs Have Also Been Fixed

- If a task subject contained non-European characters, the subjects for the corresponding calendar task entries were being replaced by question marks. Now fixed.

### Product Requirements and Compatibility

- Taskline now requires Outlook 2007 or above.
- Taskline is now compatible with both the 32-bit and 64-bit versions of Outlook 2010 and 2013.
- Taskline no longer uses a custom Outlook task form. Instead, an Outlook form region is used. This should eliminate most conflicts with other Outlook Add-Ins.

### Task Scheduling

- There is a new **Work Between** constraint type, which allows you to specify 2 dates between which a task must be carried out.
- You can now edit Taskline-created task entries in the calendar and **pin** these so that they survive a Taskline reschedule. So you can use Taskline to automatically schedule your tasks and then tweak those results manually. Pinned entries do not get deleted and recreated during a Taskline reschedule, rather they stay put. Moving a calendar task entry will automatically pin it.
-  For Taskline Professional Edition only, there is a new **Max time per day** setting. This is used to limit the amount of time allocated to a task each day. It can be used to spread a longer task out over several days or weeks, for example to divide your time between 2 or more tasks, rather than working on a single task exclusively until it's completed.
-  For Taskline Professional Edition only, there is a new **Max time per week** setting. This is used to limit how much time is allocated each week to a long task.


### Miscellaneous Changes

- You can now limit how many days in the calendar, after the **First task starts at** date, display scheduled tasks.

### User Interface Changes

- The Taskline toolbar button is replaced by ribbon controls on Outlook 2010 and above. The ribbon has a new **Reschedule** button which runs Taskline immediately, without showing the dialog first.
- Ribbon support is added for calendar task entries.
- For Outlook 2007 and 2010 only, context (right click) menu support for calendar task entries is also added. This has 4 menu items – **Open Task**, **Complete** and new **Whole Task Is Complete** and **Pin** features.

### Taskline Standard Edition

-  Taskline Standard Edition now supports the same **labels** functionality as Professional Edition; different **labels** (colors) can be assigned to different types of



tasks.

### Product Requirements and Editions

- Taskline now requires Outlook 2000 or above.
- There are now two different Taskline editions – Standard and Professional.
- Taskline Version 3 is now compatible with the Getting Things Done Outlook Add-In v2.7.5, FranklinCovey® PlanPlus v5, OneNote® 2007 and Mindjet® MindManager® 7

### Professional Edition

The following new features are in Taskline Professional Edition only (all other new features are in both editions):

- Multiple named sets of **Working hours** can be defined and different tasks can be scheduled to different time slots. For example, work tasks can be scheduled Monday thru Friday during the day, and personal tasks can be scheduled for evenings and weekends.
- You can instruct Taskline to ignore tasks which have been assigned particular **Working hours**.
- Different days of the week can have different working hours.
- Working 24 hours a day is supported. If the **To** time of a break or the **Stop work** time is 0:00, this is taken as midnight.
- Up to 4 day time breaks can be defined.

### Standard Edition

This contains all the new features listed below. Additionally, there are two differences from Taskline v2.1:

- You can no longer override travel time per appointment. This feature is only supported in Taskline Professional Edition.
- You can only assign a single **label** (color) to calendar task entries. Professional Edition supports different **labels** (colors) being assigned to different types of tasks.

### Task Progress

- The task progress model has been updated. Taskline no longer schedules completed tasks backwards from the **First task starts at** date. Instead, completed tasks are left unchanged by Taskline. In effect, the scheduled dates are assumed to have been correct. If things didn't go to plan, you can optionally reflect this by updating the tasks or the calendar task entries.
- Progress can now be updated from the calendar, as well as directly on the task itself.
- When opened, calendar task entries now feature a Taskline toolbar. This enables you to open the task, or mark the calendar task entry as Complete.

### Projects

- A new **Projects** tab allows you to create and delete projects and set a project

order.

- You can now order tasks by **Project**.
- You can instruct Taskline to ignore all tasks which have been assigned a particular **Project**.
- Calendar task entries can be colored according to **Project**.

### Task Scheduling

- **Order by Due date**, which previously existed in earlier Taskline versions, has been reinstated. Ordering by **Due** date now works slightly differently to other **Order By** options in that Taskline will not only order by this date, but will also try and make sure that the task is completed on or before the **Due** date.
- You can now specify a **constraint time** for recurring tasks, to force recurring tasks to start or finish at a specific time, as well as on a specific date.
- When a task misses a constraint, Taskline now allows you to prefix the task subject with some text, so that you have a record of which tasks need attention. The default characters are "!!". Missed task constraints still result in a message box at the end of the task reschedule.
- There is a new **Missed constraint** task field which gives the elapsed gap between the scheduled date and the **constraint date**. This enables you to create an Outlook view highlighting tasks that need attention, optionally sorted into an order showing which tasks have missed their constraints by the greatest amounts.
- Regenerating tasks now get a warning message, rather than an error message, when their date is missed. This message will go away if the **Taskline should set Start and Due to the Scheduled dates** option is set. Furthermore, regenerating tasks that miss their dates will not mark the task as requiring attention. This is because regenerating tasks generally represent something that needs doing repeatedly, but not on specific dates. Regenerating tasks are a specific type of recurring task.
- Background reschedules no longer pop up an alert if task constraints are missed.
- There are new reschedule options, on the **Advanced Options** dialog, that help you to understand how Taskline schedules your tasks.

### Miscellaneous Changes

- A **task import** feature creates tasks from text, one task per line of text. This is to quickly convert a text To Do list into Outlook tasks.
- There is a new **Advanced Options** dialog, which keeps the less often used options out of the Taskline Settings dialog tabs.
- There is a new advanced option to explicitly set the **Category** of Taskline-created calendar task entries.
- The final **Task Schedule Report** dialog has been greatly enhanced. It now shows a per-project or per-task category breakdown and also allows this information to be copied to the clipboard for pasting into a spreadsheet.
- If no time unit is supplied for appointment traveling time, minutes is now assumed. Previously, hours were assumed.
- A new **ABC** field on tasks contains the letter of **Priority (A1)**, if set. This allows you to group Outlook views by this letter.
- Taskline now supports Hungarian date formats (which have a separator at the end of the date).
- Tasks set to **Deferred** or **Waiting** now have their **Due** dates cleared. This is to

remove them from Outlook's daily To Do list and also from the calendar.

- When there are multiple accounts on one computer, Taskline Setup now has the option to install Taskline for all users, or just the current user.

## Taskline Version 2.1

December, 2004

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- You can now control how Taskline splits a task into shorter parts during scheduling. You can switch off task splitting and you can specify the minimum duration of the parts of a split task. [How?](#)
- You can specify a time allowance before and after an appointment, to allow for traveling time or meeting preparation. You define a default traveling time for all appointments on the **Calendar** tab of the Taskline's dialog, which can be overridden on a per-appointment basis. [How?](#)
- There are new options to show task entries in the calendar as all day events. [More.](#)
- There is a new option to show milestones in the calendar as all day events. [More.](#) If you use Outlook 2002 or newer, you can also use labels to give milestones a different color on the calendar, to highlight them. [How?](#)
- Task priorities now use the A00-Z99 format. The **Task priority** option has been replaced with the **Priority (A1)** option on the **Taskline** form. The former **Task priority** option in Taskline versions 1 and 2.0 is still supported, but does not appear on the **Taskline** form.
- A new read-only task field is available to add to the task list view in Outlook: **Hours remaining**. This is same as the value for **Work remaining**, but is always represented as a number of hours.
- The **Ignore this task** check box is selected by default in this version of Taskline. However, when you enter information in the **Total work** box, this automatically clears the **Ignore this task** check box, allowing Taskline to schedule the task. Thus, to schedule milestones, which have zero hours **Total work**, you will now need to manually clear the **Ignore this task** check box.
- Taskline 2.1 is now compatible with FranklinCovey® PlanPlus versions 1, 2 and 3.
- You can now order tasks by the task subject. This is useful if you, or other software, place a code or priority at the start of the task subject.
- You can now assign each task to a project, to help you organize your tasks more effectively.
- There is now a command line option **/NoDialog** which allows you to run Taskline in the background using the Windows task scheduler. [How?](#)

## Taskline Version 2

January, 2004

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### Task Scheduling

- Taskline now supports recurring tasks. You can schedule the next occurrence of a recurring task.
- You can specify task constraints, such as a **Finish On** constraint, with a date and omit the time. This reduces data entry and allows Taskline to optimize the schedule. If you don't supply a time, the constraint applies to any time during the specified day.

- If several tasks are dependent upon a constraint, such as several tasks affected by a deadline, you can select the other tasks from the Taskline task form in Outlook. This feature replaces and is more efficient than the Taskline version 1 Task Sequences feature.
- When you do not enter a value in **Total work**, a warning message displays.
- You can instruct Taskline to not schedule a task on the Outlook Calendar by clicking the **Ignore this task** check box on the Taskline task form.
- Setting **Ignore** for a task or setting the task status to **Waiting on someone else** or **Deferred** clears the **Scheduled Start**, **Schedule End** and **Week Commencing** boxes.
- Taskline no longer supports the following constraints that were not used very often: **Start on or Before** and **Finish On Or After**.
- Taskline Version 2 now reschedules tasks faster than Version 1.

### Improvements to the Taskline Task Form in Outlook

- You can select dates more accurately and efficiently with a Calendar control. This feature is not supported in Outlook 97.
- You can get Help from the Taskline form when you open a task.
- You can set whether the **Task** tab or the **Taskline** tab appears first on the **Taskline** form when you open a task.
- You can set an option so that all new tasks are assigned a category and that you cannot remove the category from existing tasks, although you can change the category.

### Compatibility

Taskline is now compatible with:

- Outlook® 2003
- NetCentrics Getting Things Done Versions 1 and 2
- Franklin Covey® PlanPlus Version 1
- Chapura® Inc's PocketMirror®

### Calendar Task Entries

- Taskline Version 1 introduced the ability to view your tasks in the Outlook calendar. If you use Outlook 2002 or 2003, then Taskline Version 2 now allows you to view your Calendar task entries quickly and easily in different colors. You can use the Outlook **Labels** feature to color tasks on the Calendar; for example, you might want to apply the color red to all high-priority tasks on the Calendar. [More](#).
- Calendar task entries now get assigned the same values for category and importance as the tasks they represent.
- You can now create calendar task entries to show the following settings: **Busy**, **Tentative**, **Free** or **Out of Office**.

### Miscellaneous

- You can run Taskline from within Outlook by clicking a button on the Outlook toolbar.
- You can set up the main options for Taskline during Setup.

- When Taskline schedules assigned tasks, you can prevent Outlook from sending update emails back to the task owner. This prevents Outlook from generating unnecessary emails.
- You can apply changes without closing the **Taskline** dialog box with the new **Apply** button.
- The **Summary of Task Schedule** dialog that appears when Taskline completes now shows enhanced content and presentation.
- Taskline can optionally update task **Start date** and **Due date**. Version 2 also adds the ability to restore the original **Start date and Due date**, if Taskline changes these dates.
- You can renumber tasks quickly with the new **Renumber Task Priorities** feature.
- Folder names on the Taskline Settings dialog now show the full folder path, rather than just the folder name. This removes ambiguities when two or more folders have the same name.
- When you enter tasks in Outlook's table view, you can use the constraint abbreviations **SO** for Start On, **SOOA** for Start On or After, **FO** for Finish On, and **FOOB** for Finish On or Before.
- Taskline installs completely and correctly on Windows NT, 2000, and XP, even if you do not have Administrator access rights.
- The evaluation period of the unregistered version is now 10 non-consecutive days, instead of 30 consecutive days.

## What's New

For the latest What's New? information, please visit [www.taskline.com/whatsNew.asp](http://www.taskline.com/whatsNew.asp)

Version 5.0.42

September 7, 2020

- 
- This version fixes an issue saving Taskline Settings on IMAP stores.

Version 5.0.40

September 4, 2020

- 
- **Import Tasks** now allows default values for **Priority (Low/Normal/High)** and **Priority (A1)** to be specified.

Version 5.0.37

August 10, 2020

- 
- The **External constraint**, **Working hours** and **Show as** combo boxes on the Taskline task form in Outlook had no blank line, so you couldn't remove these settings. This is now fixed.

Version 5.0.34

July 9, 2020

- 
- There is a new option to change **Show As** on calendar task entries when a task is made **Complete**. This compliments the setting that allows you set **Show As** on **Not Started** calendar task entries.
  - You can now order tasks by **Start** date, as well as by **Due** date

Version 5.0.26

June 16, 2020

- 
- The Taskline 4 options to **Move completed tasks** to a different Outlook folder and to **Delete completed occurrences of recurring tasks** have been reinstated in Taskline 5.

Version 5.0.15

May 12, 2020

- 
- Recurring appointments are now read in more quickly.
  - The yearly and monthly "on the 1st/2nd/3rd/4th/Last weekday/weekend day of a month" types of recurring appointments are now supported by Taskline.
  - Support has been improved for storing Taskline settings when only an IMAP account is available.

## Taskline Version 5

April, 2020

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- Taskline 5 has been extensively re-engineered and now runs substantially faster, typically twice as fast as Taskline 4.1 and earlier.
  - Taskline 5 works with Outlook folders to support a full task hierarchy, with summary tasks. [More](#)

- Taskline Settings are now stored in the same place as Outlook tasks. So now the same tasks and settings information can be accessed from any computer. With Taskline 4 and earlier, Taskline's settings were stored in the Windows Registry on the local computer.
- There are now 2 pre-installed Outlook custom views – **Taskline A1** and **Taskline Nat Ord** – optimized for viewing Taskline tasks.
- Your appointments can now be in 2 Outlook Calendar folders. This is useful if, for example, you have different Work and Home calendars.
- You can now control how each type of appointment (**Busy**, **Tentative** etc) influences the task reschedule for each set of **Working Hours**. So, for example, some types of tasks could be scheduled during **Out of Office** appointments.
- There is a new **Open Calendar Tasks** right-click menu option for Taskline tasks.
- The **Summary of Task Schedule** report has been completely rewritten:
  - It now shows a detailed report of all tasks with optional sorting, grouping and filtering.
  - The report can summarize your schedule by **Folder**, **Project**, **Category** or **Working Hours**.
  - The report optionally includes Completed work, not just future work as with Taskline 4.1 and earlier.
- With Taskline v4.1, there were 2 Outlook Add-Ins. Now there is just one, called "Taskline Outlook Add-in". This should improve reliability.
- **Taskline Standard Edition** now supports the same flexible working week definition as **Taskline Professional Edition**, so that for example you can work different hours on different days, although **Standard Edition** only supports a single **Working Hours** definition.
- Outlook **Task Import** has been enhanced so that you can now import many different task settings, not just **Subject**.
- Taskline now requires Outlook 2010 or later.
- You can now license Taskline's cutting-edge rescheduling technology for use in your own application. Please [contact us](#) for more information.

## Feature Differences Between Taskline 4 and Taskline 5

- The Taskline 4 settings:
  - **Move completed tasks to...**
  - **Delete completed occurrences of recurring tasks**
 Have been removed from Taskline 5. This is because:
  - Taskline 5 now supports a full task hierarchy. Generally, in a hierarchy, it is better to leave items in their original folders. Moving completed tasks that were originally in different folders into the same folder would undermine the hierarchy.
  - The Task Schedule Report now reports information on completed tasks, such as **Work Done** and **Work Remaining**. It can't do this properly if completed tasks have been moved to a different folder.
- The way **Order by Due date** works has been changed. With Taskline 4, not only were tasks ordered by **Due date**, but Taskline also tried to make sure that tasks were completed on or before the **Due date**. With Taskline 5, **Order by Due date** now works the same way as the other **Order by** fields. It is just used for task ordering. This makes things simpler and consistent. Task **Constraints** can still be

used if you need a task to finish on or before a certain date.

#### **What Was New in Previous Taskline Versions**