

Microsoft SharePoint

Owner: Project Tasks



Introduction

Create a project tasks list when you want a graphical view (A Gantt Chart) of a group of work items that you or your team needs to complete. You can open this list in Windows SharePoint Services-compatible programs (like Access or Outlook). Project tasks are small sets of tasks used for a short timeframe.

Process Summary

Project Tasks Area

Project Tasks

1. Create a folder
2. Create an item

Create a Project Tasks

You can create a folder to organize your links or place a links in the general links area.

1. From the Home page click on **Lists** in the Quick Launch menu.
2. Click on the **Create** button.
3. Select **Project Tasks** from the tracking category.
4. Give your project tasks list a name by completing the **Name** field (Fig 1, 1).
5. If you would like a description for your project tasks complete the **Description** area (Fig 1, 2).
6. Select **Yes** (Fig 1, 3) for the project tasks to be displayed in the quick launch menu.
7. Select **Yes** (Fig 1, 4) to have an email sent when ownership is assigned or when an item has been changed.

Figure 1

Name and Description
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name:

Description:

Navigation
Specify whether a link to this list appears in the Quick Launch.

Display this list on the Quick Launch:
 Yes No

E-Mail Notification
Send e-mail when ownership is assigned or when an item has been changed.

Send e-mail when ownership is assigned or when an item has been changed?
 Yes No

Create Cancel

7. Click **Create** (Fig 1, 5).

Create New Project Tasks


If you have more than one project it is a good idea to create project folders and then new items within the project folders.

Create a Folder

1. From within the project tasks area, click on the drop down arrow next to **New**.
2. Give your project tasks a **Name**.
3. Click **Ok**.
4. You can now add new project tasks inside the folder by clicking on the folder name.

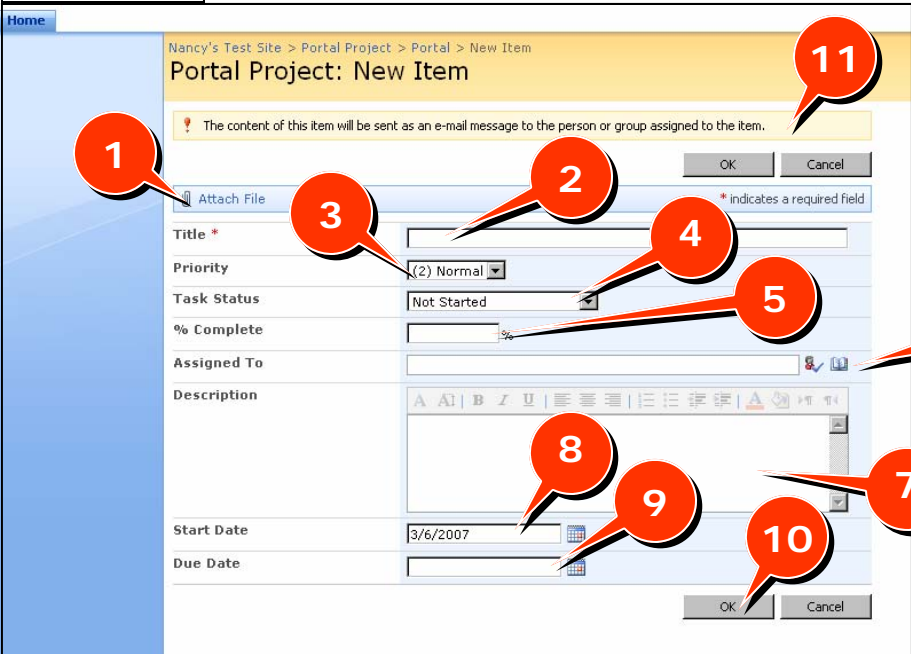
Create a New Item

1. From within a project task folder or area, click on the drop down arrow next to **New**.
2. You can attach a file by clicking on the **Attach File** button (Fig 2, 1).
3. Give your project tasks a **Title** (Fig 2, 2).
4. Select a **Priority** (Fig 2, 3) for your project tasks.
5. Select a **Status** (Fig 2, 4).
6. Type in the **Percentage** that has been completed (Fig 2, 5).
7. **Assign** the task to someone by typing in the TowsonU username (Fig 2, 6) (use can also use the check names or address book).

 Note: When you created your project tasks if you select to have an e-mail sent when a project is assigned you will see a note at the top reminding you of this (Fig 2, 11).

7. Give your project tasks a **Description** (Fig 2, 7).
8. Select a **Start date** (Fig 2, 8)
9. Select a **Due date** (Fig 2, 9).
10. Click **Ok** (Fig 2, 10).

Figure 2



The screenshot shows the 'Portal Project: New Item' form in SharePoint. The form includes the following fields and buttons, with callouts indicating their locations:

- 1:** Attach File button
- 2:** Title field
- 3:** Priority dropdown menu (set to '(2) Normal')
- 4:** Task Status dropdown menu (set to 'Not Started')
- 5:** % Complete field
- 6:** Assigned To field
- 7:** Description field
- 8:** Start Date field (set to 3/6/2007)
- 9:** Due Date field
- 10:** OK button at the bottom
- 11:** Note at the top: 'The content of this item will be sent as an e-mail message to the person or group assigned to the item.'