



# Gmail

## Chapter 5: Manage and create task lists

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### To do lists and tasks in Gmail

#### Overview

Tasks is the part of Gmail designed to help you keep track of the things you need to do, without even leaving your inbox. You can create lists of items, set due dates, add details or notes, and even add email messages from your Gmail account directly to Tasks.

Like a written task list, you can check items off your list (with great satisfaction). Even better, you can view a history of your completed tasks and the date you 'crossed' them off your list.

Often times you receive an email that causes a new task to your to do list. With the integration of Gmail, you can actually add a related email directly to your task list and have the ability to click and recall the email referenced.

Store any information you want! Tasks is designed to help you keep track of things you need to do, but you can still use it for any listing actions you want, such as making a grocery list or outlining a presentation. You can create as many lists as you need to organize your information.

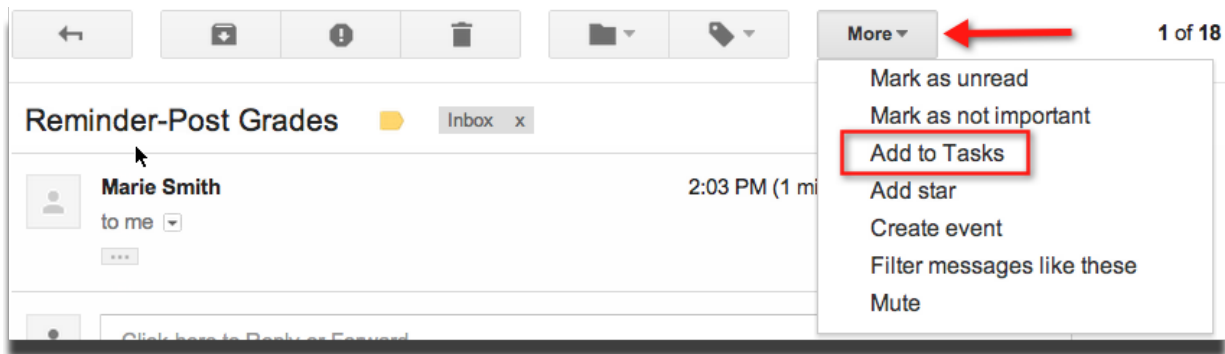
#### Example:



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A reminder email message comes from the Principal for student progress reports. You click to **'Add to Tasks'** and the email now appears in your task list. You assign a name to the task - 'Student progress reports' and add a completion date. Later that week, you start to work on the student progress reports and need to read the email from the Principal again. You open your task list, click on the 'Related email' link within your 'Student progress reports' task and Gmail brings up the original email. When you finish your task, you 'cross' it off and clear your task list (and your mind!)



### Open and create tasks

To get started with Tasks, just click the arrow next to **Mail** under your domain logo, on the left side of the screen and select **Tasks**

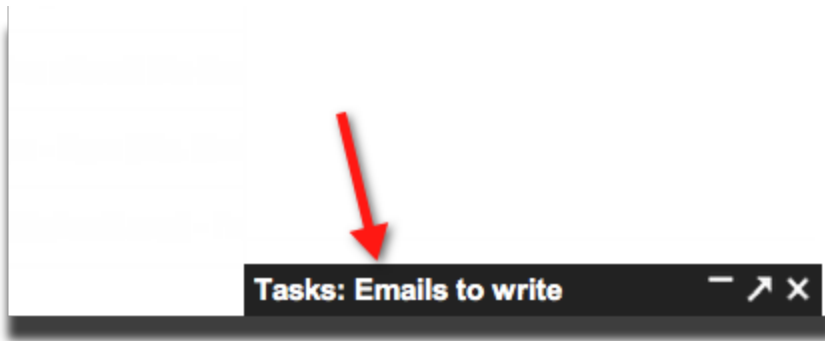


A Tasks window will open at the bottom of your screen. Click on it to expand it.

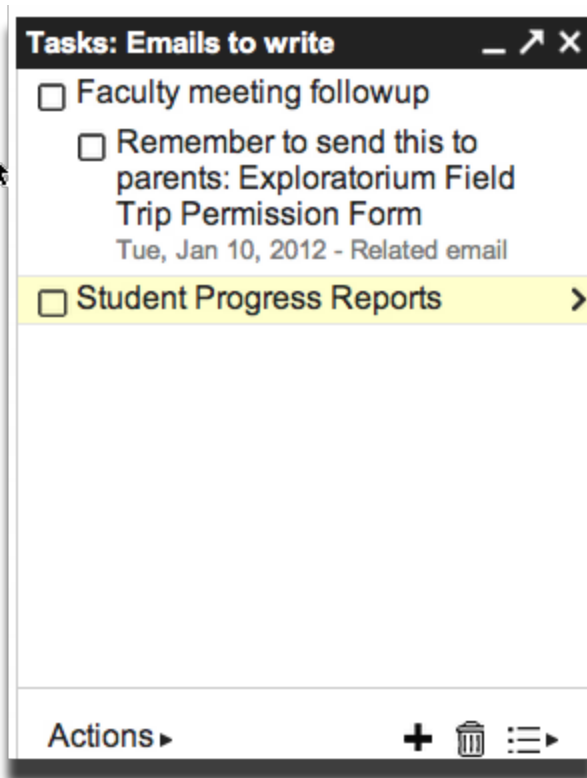


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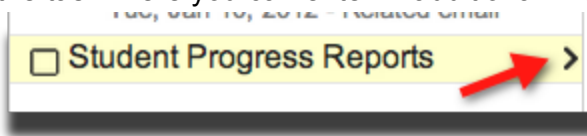
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To enter tasks, just click in the Tasks window and start typing just like you would in a word processor. Once you've typed in a task, press Enter to create another one, or use the + button at the bottom of your list.



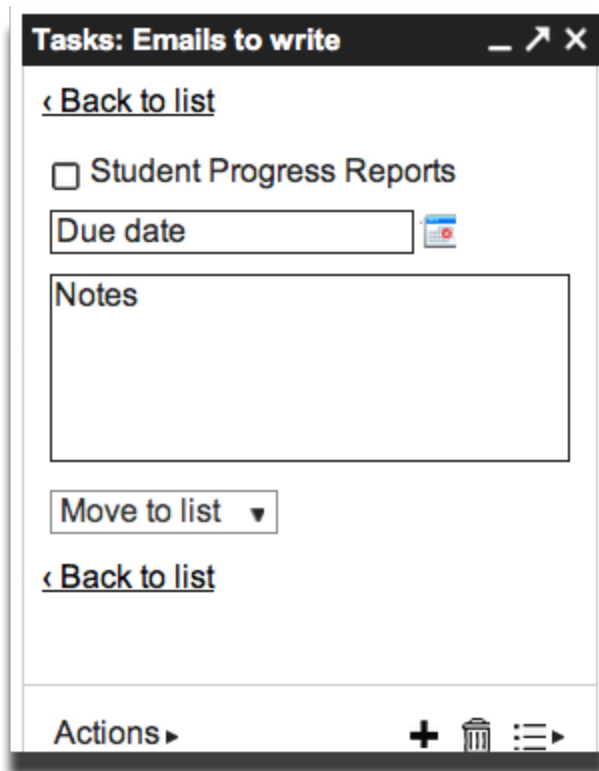
If you would like to add additional details to your task, click the right arrow link on the right side of the task. Here you can enter in additional information and a due date.





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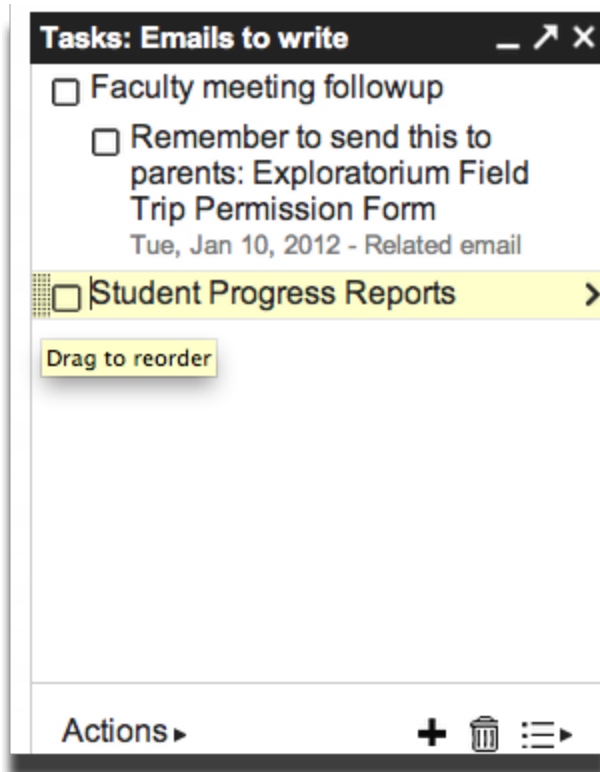
You can also add "subtasks" by using Tab to indent them, and shift + Tab to move them back. This is particularly handy if you have a larger task - such as create the Chapter 4 lesson plan - that also has smaller, related tasks - such as writing the chapter test, creating a class presentation, finding related videos, etc.

Keep your list organized and prioritized by moving your tasks. You can move tasks around your list by grabbing them to the left of the check mark and dragging them up and down.

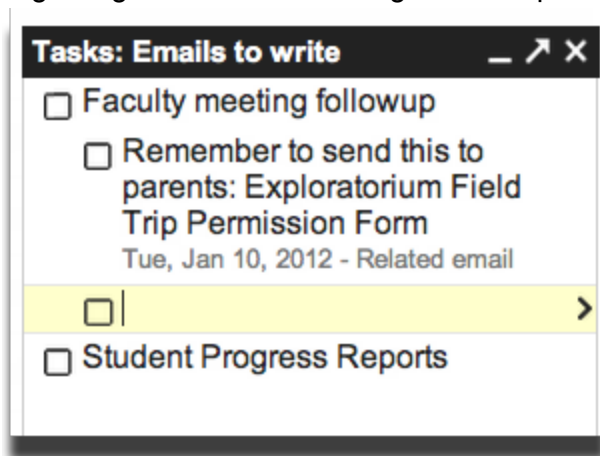


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If you want to add a new task to the middle of a list, instead of the top or bottom, click at the beginning or end of an existing task and pressing Enter. Then start typing your new task



Finally, when you have completed a Task, you can check it off by selecting the 'checkbox' next to the task. Then you can go to 'Actions' and select 'Clear completed' to keep your to do list current and tidy. Don't worry, you can still view them later!

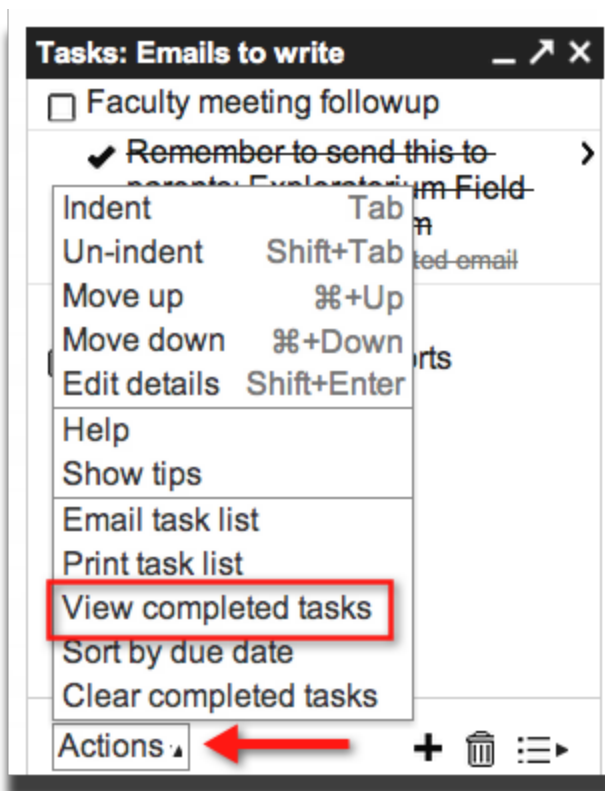


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To view all those completed tasks (and get a nice summary of all that you have done), go to the 'Actions' menu and select 'View completed Tasks.'



To clear completed tasks from the current task list, select **Actions** and then **Clear completed tasks**. This will not delete your completed task, but will hide it from the current tasks that are due.



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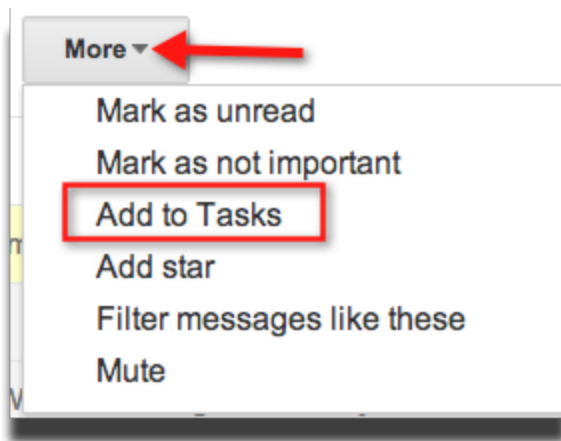
### Create a task from an email

The advantage of having your Tasks available in your Gmail account is the ease of which to create a Task from an email. The next time you receive a request from a parent to send a progress report, or from the department head to create the weekly newsletter, you can create a task from that email.

You can create a task from an email from either the inbox view or the email message view.

From the inbox view:

1. Select the email messages you would like to be assigned as tasks
2. Click on the **More** button
3. Select 'Add to Tasks'



### Keyboard shortcuts

Like the rest of Gmail, you can also use your keyboard shortcuts to create, organize, and move through Tasks.

Useful keyboard shortcuts include:

| In Gmail            | Shift + T    | Create a task based on the open message             |
|---------------------|--------------|---|
|                     | G and then K | Open Tasks, or shift the cursor from Gmail to Tasks |
| In the Tasks Window | Tab          | Moves task right ("subtasks")                       |



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|  |               |  |
|--|---------------|--|
|  | Shift + Tab   | Moves task left                                |
|  | Ctrl + Up     | Moves task up                                  |
|  | Ctrl + Down   | Moves task down                                |
|  | Shift + Enter | Edit task details, including due date or notes |
|  | Esc           | Close Tasks                                    |
|  | Shift + Esc   | Shift the cursor from Tasks to Gmail           |

### Create, organize, and prioritize multiple task lists

#### Create a task list

Gmail creates one Task list for you by default - usually titled [Your name]'s Task list. You can add more task lists, and even move tasks between lists, to help organize and manage your to do items.

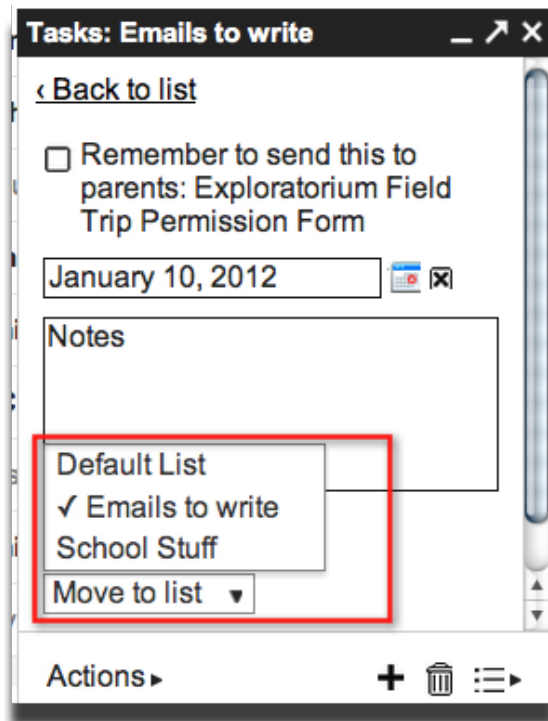
Instead of having one long to-do list, you can break-up your tasks into multiple lists. This way you could keep a separate task list for different projects or different classes. Please note, though, unlike emails and labels, each task can only be assigned to one list. You can however, move a task between lists. This can be helpful if you have a list for 'Tests to Grade' and another for 'Waiting for response.' Once you complete an email, you can move it to your 'Waiting for Response' list until you hear back and have another 'task' to add.





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To create a new task list:

1. Click the arrow next to **Mail** under your domain logo, on the left side of the screen and select **Tasks**

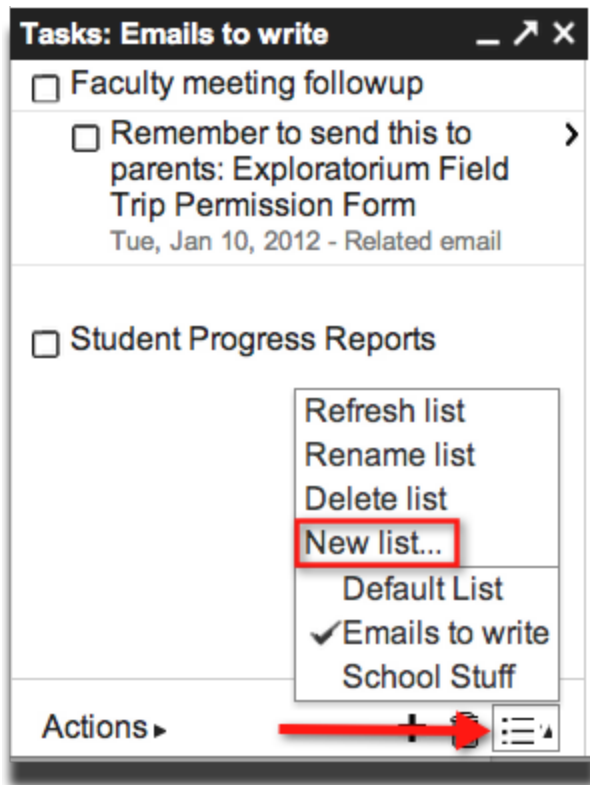


2. If you do not see your task list, click the '\_' icon in the minimized window to the far bottom right of your inbox
3. Click the bottom right 'list' button icon and select 'New List'



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4. Enter the new list name and click **OK**.

Gmail will automatically switch to the new list where you can start entering tasks.

### Switch task lists

You can easily view all your lists from within the Tasks window.

**Please note:** When you add an email message to a task, the task will be added to the current list view. If you would like to add a task from an email to a different list, you will need to switch views.

To switch views to another list:

1. Click the arrow next to **Mail** under your domain logo, on the left side of the screen and select **Tasks**



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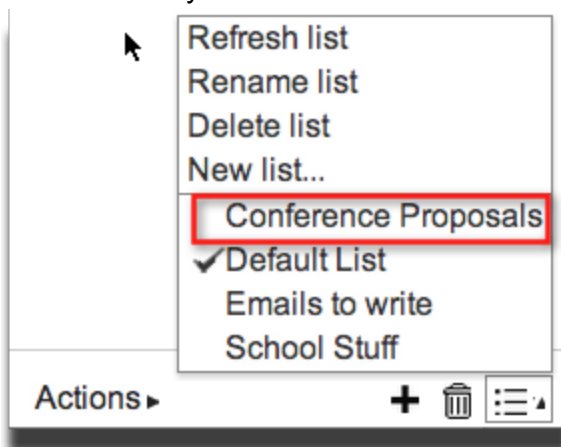
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2. If you do not see your task list, click the '\_' icon in the minimized window to the far bottom right of your inbox
3. Click the bottom right 'list' button icon



4. Select the list you would like to view



### Move a task between lists

You can also move a task from one list to another – for example from 'To Do' to 'Waiting for' or from 'Phase 1' to 'Phase 2'.

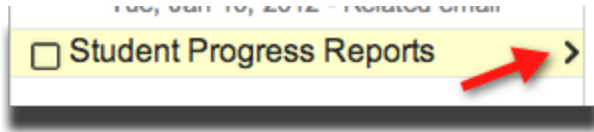
To move a task:

1. Find the task on the list you would like to move
2. Click the right arrow link on the right side of the task

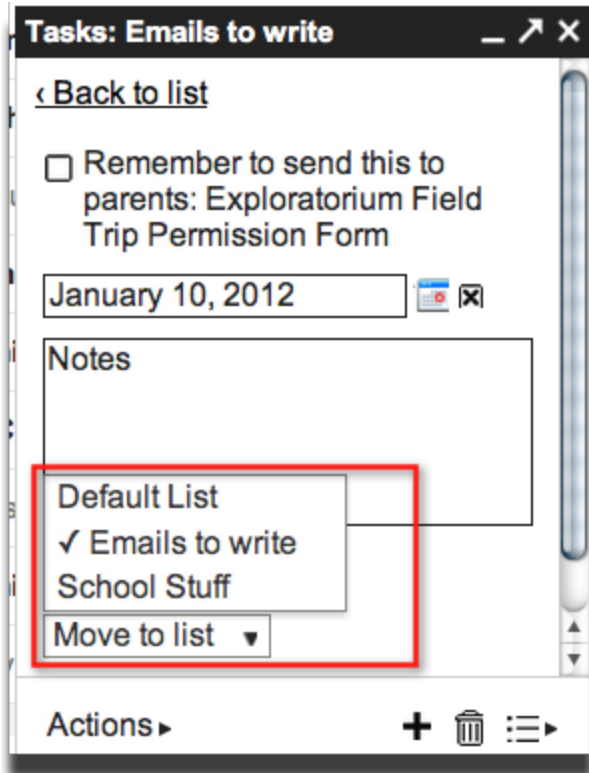


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3. At the bottom of the window, click the drop down next to **Move to list**



4. Select the desired list for the task

### Rename or delete a list

Tasks and projects are always changing, so it's natural to need to rename or delete lists.

To rename a list:

1. Click the arrow next to **Mail** under your domain logo, on the left side of the screen and select **Tasks**



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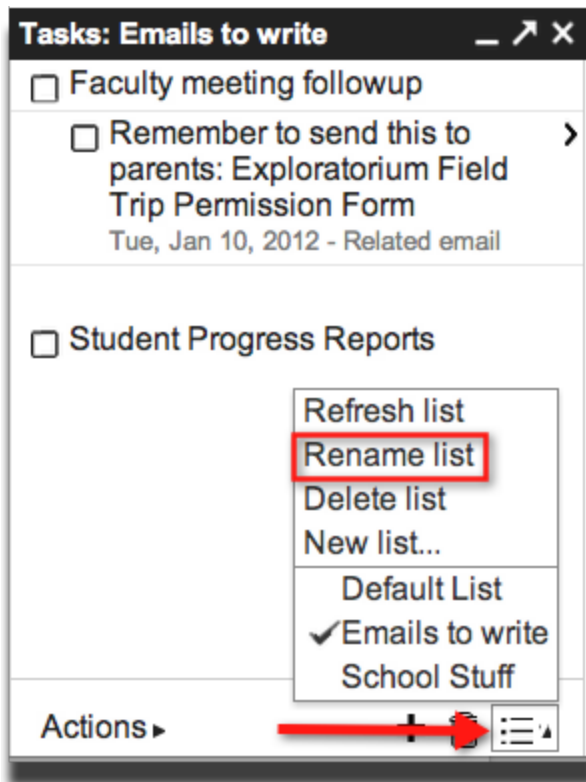
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2. If you do not see your task list, click the '\_' icon in the minimized window to the far bottom right of your inbox
3. If you are not already viewing the list you would like to rename, click the bottom right 'list' button icon and select the list



4. From that same 'list' button, select 'Rename list'



5. Enter the new name for the list and click **OK**.



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To delete a list:

1. Click the arrow next to **Mail** under your domain logo, on the left side of the screen and select **Tasks**



2. If you do not see your task list, click the '\_' icon in the minimized window to the far bottom right of your inbox
3. If you are not already viewing the list you would like to rename, click the bottom right 'list' button icon and select the list

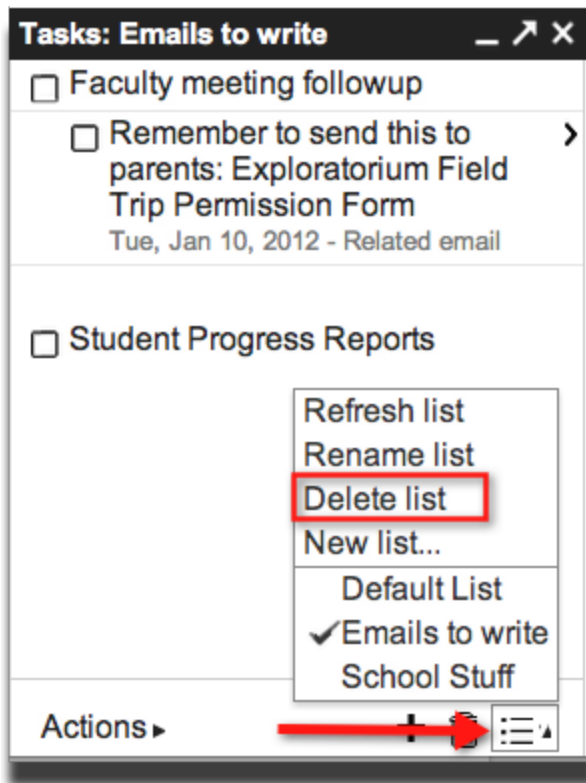


4. From that same 'list' button, select 'Delete list'



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5. Confirm that you want to delete the list (and it's related tasks) and click **OK**.

## Print or send a task list to someone

### Print a task list

You can print a task list, completely with boxes to check them off, from the **Tasks** window.

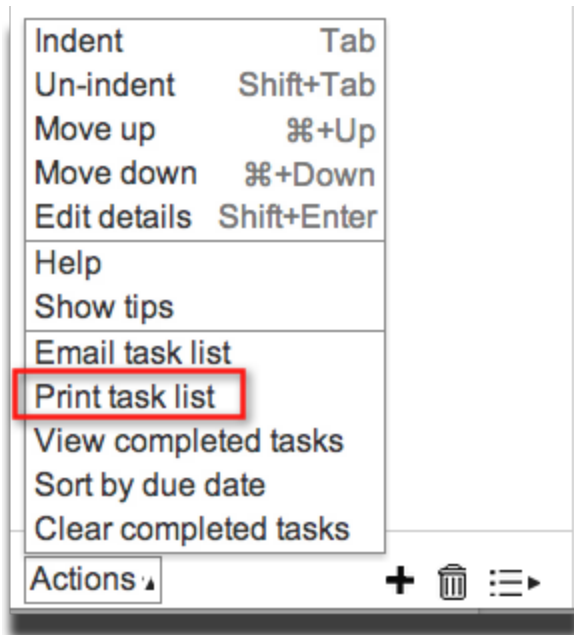
To print your task lists:

1. Click the arrow next to **Mail** under your domain logo, on the left side of the screen and select **Tasks**
2. If your **Tasks** window isn't active, click the '\_' icon on the bottom right of your screen
3. Click Actions and select 'Print task list'



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To print another task list, you will need to change the list view. To change the list view, click on the 'Lists' icon and select the list you would like to print. Then follow the instructions above.

### Email a task list

Sometimes you need to send someone else a task list - perhaps you created the tasks necessary to completing a group project, or you created a shopping list for someone else. For example, you can create a list of tasks for your student assistant to complete and then send him or her the list via email. You can choose to have this list emailed and it will appear just like an email message. You can then email the list as you would any other email - send to a group or individuals, add formatting, apply labels, etc.

To email a task list:

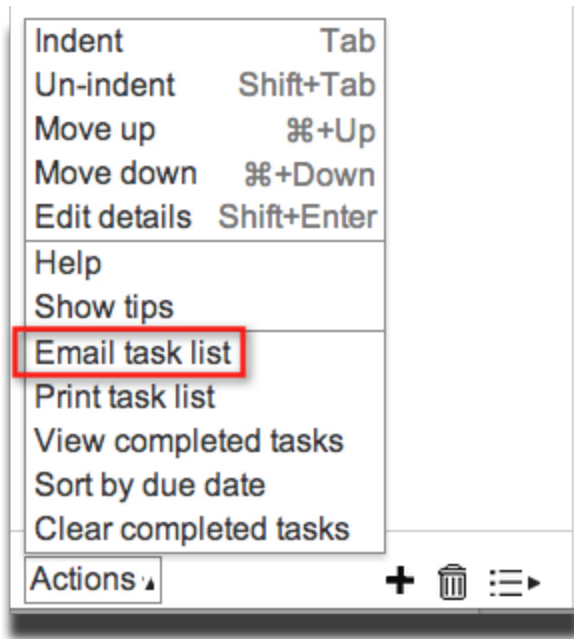
1. Click the arrow next to **Mail** under your domain logo, on the left side of the screen and select **Tasks**
2. If your **Tasks** window isn't active, click the '\_' icon on the bottom right of your screen
3. Click **Actions** and select '**Email task list**'





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This will then open a new message window with your entire task list as the message content. Edit the message as you would any other and send!

To email another task list, you will need to change the list view. To change the list view, click on the 'Lists' icon and select the list you would like to print. Then follow the instructions above.

## Integrate tasks with Google Calendar

### Due dates in Calendar

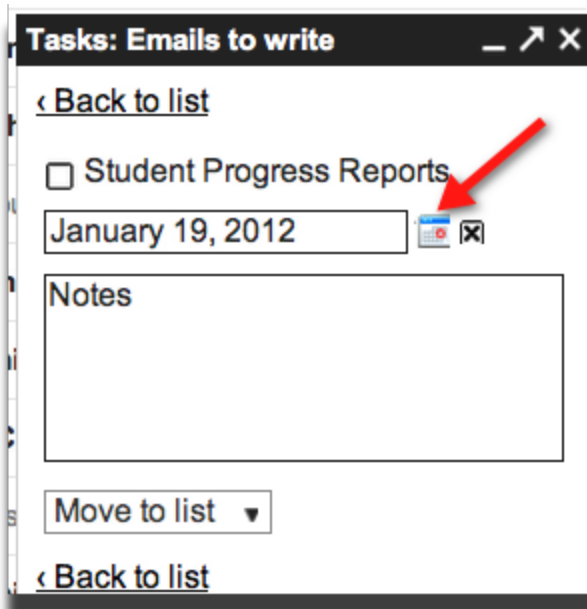
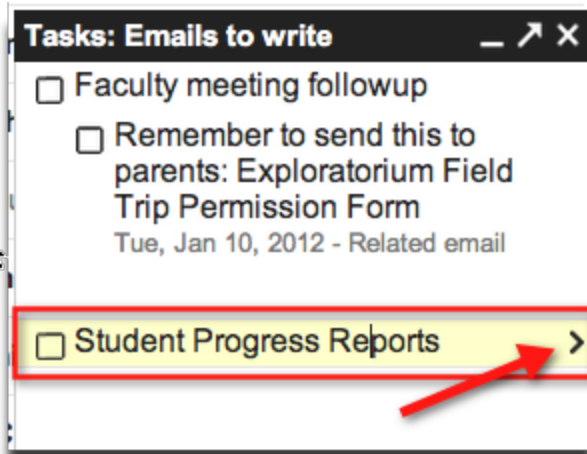
Often times it's handy to have your tasks viewable in a calendar, as due dates and scheduling can be important parts of developing a task list.

There is a checkbox alongside the event, so you can 'cross off' a task in Google Calendar the same as you would in your Gmail Tasks view.



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The screenshot shows a Gmail calendar interface. The main calendar view displays a grid of days from Monday, January 16, to Saturday, January 21. A task titled "Student Progr" is visible in the calendar grid for Thursday, January 19. To the right of the calendar is a "Tasks" sidebar. Under the "Emails to write" section, there is a list of tasks. The task "Student Progress Reports" for Thursday, January 19, is highlighted. A red arrow points to this task in the list, and another red arrow points to the "Student Progr" task in the calendar grid.

### View and add tasks in Calendar

You can also create tasks directly in Calendar by clicking on a date and then selecting the **Task** link in the dialog box that opens. The task will be added to your default task list at the time and will also add an entry on your calendar.

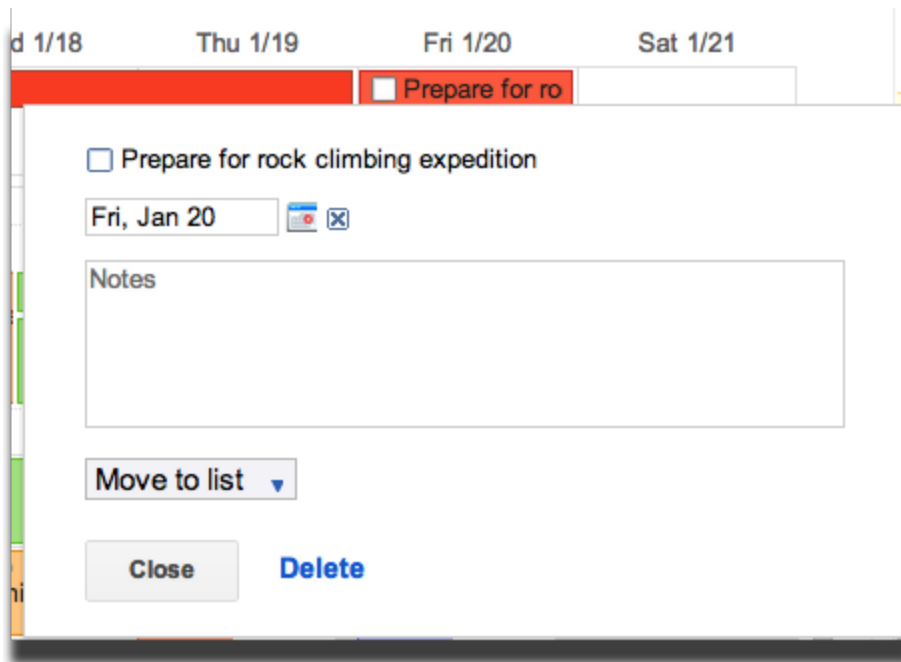
The screenshot shows the "Event | Task" dialog box in Gmail. The dialog box has a title bar with "Event | Task" and a close button. Below the title bar are three input fields: "Task:", "Due date:", and "Note:". The "Due date:" field is pre-filled with "Fri, January 20". At the bottom of the dialog box is a "Create task" button. A red arrow points to the "Event | Task" header.

Once the entry is created on your calendar, you can click on it and make modifications, move it to another list, etc.



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The 'Tasks' gadget on the right side of your Calendar page also acts exactly the same as the **Tasks** window in your Gmail account with the ability to add, edit, or move tasks, create, edit, or switch task lists, etc.



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The screenshot displays the Gmail interface. On the left, a calendar view shows the dates Fri 1/20 and Sat 1/21. A task titled "Prepare for ro" is listed for Friday, 1/20, with a red background and a checkbox. On the right, a "Tasks" panel is open, showing a list of tasks. The first task, "Prepare for rock climbing expedition", is highlighted in yellow and includes a checkbox, a right-pointing arrow, and a due date of "Fri, Jan 20". Below it is a task "Faculty meeting followup" with a checkbox, which includes a sub-task "Remember to send this to parents:" followed by "Exploratorium", "Field Trip", and "Permission Form", with a due date of "Tue, Jan 10" and a link to "Related email". At the bottom of the task list, "Student Progress" is partially visible. The "Tasks" panel has a close button (X) in the top right corner and an "Actions" menu at the bottom with icons for adding, deleting, and more options.