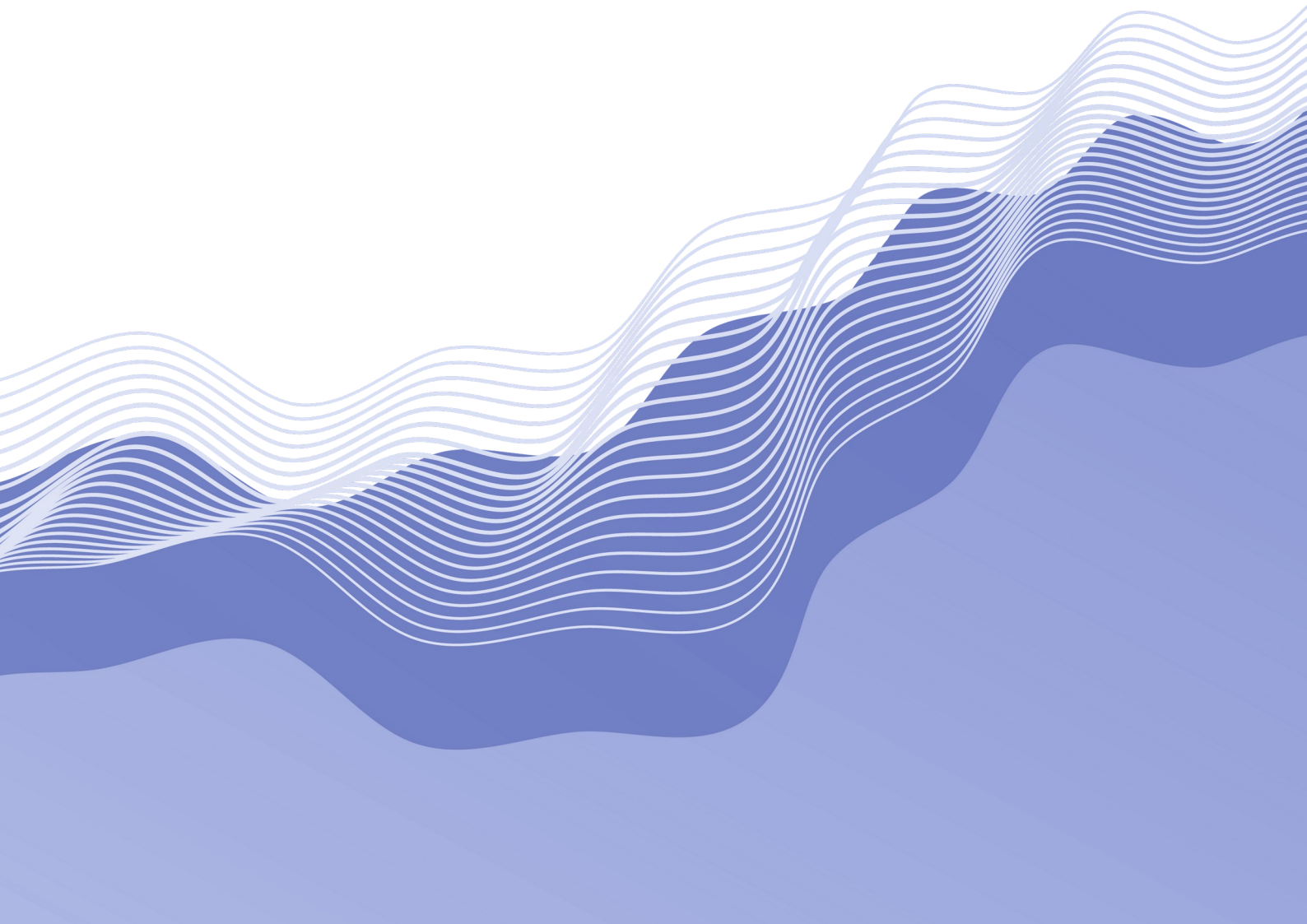




My Tasks

Quick Start Guide

Version 26.10.13 · Updated 10/20/2026



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About this Guide

This Quick Start Guide helps you install My Tasks and publish a personal task list on a SharePoint page in about 15 minutes. The guide is designed for Microsoft 365 administrators, site owners, consultants and IT professionals.

For a complete description of all settings, see the *My Tasks. Administrator Guide*.

Product Overview

My Tasks collects the tasks assigned to the signed-in user from Microsoft Planner, Microsoft To Do, flagged Outlook e-mails, SharePoint task lists, Project Online and Azure DevOps into one list on a SharePoint page or in Microsoft Teams. Every user sees only their own tasks; the web part reads tasks and never changes them.

Key features of My Tasks:

- One list for six task sources, each switched on or off separately
- Due Date column with overdue highlighting and the quick filters Overdue, Today and This week
- Filter panel by project, source, status, priority and author
- Personal sorting and filters remembered in the browser
- Task details panel and export to Excel
- Configurable columns, paging, excluded statuses and auto refresh
- Azure DevOps Query Viewer web part for saved Azure DevOps queries
- Microsoft Teams personal app and channel tabs

My Tasks

Refresh

Due Date

Export To Excel

Task Name	Project Name	Due Date	Task Status	Priority	Source	Created Date	Author
Prepare release notes	Contoso Customer P...	10/17/2026	Active	2	Azure DevOps	10/17/2026	
Migrate content to L...	Website relaunch	10/23/2026	Not Started	Normal	Planner	10/17/2026	Vitālijs Kalniņš
Design new homepa...	Website relaunch	10/21/2026	Not Started	Normal	Planner	10/17/2026	Vitālijs Kalniņš

Figure 1. My Tasks on a SharePoint page

Installation

Software Requirements

SharePoint Online (Microsoft 365) with an app catalog. The web parts work on modern pages and in Microsoft Teams.

Important

My Tasks cannot be installed on SharePoint Server.

Supported browsers: the latest versions of Microsoft Edge, Google Chrome, Mozilla Firefox and Apple Safari, and the Microsoft Teams and SharePoint mobile apps.

Required Permissions

To install the package and approve its API permissions, you need the **SharePoint Administrator** role. To add the web part to a page, you need edit permission on the page.

Installation Package

Download the package from the Vitextra Download Center (<https://vitextra.com/en/downloads>) or Microsoft AppSource.

Tip

The Download Center provides updates and new features as soon as they are ready. Publication in AppSource can take up to two weeks because of the Microsoft verification process.

Extract the downloaded ZIP archive. It contains the file `vitextra.my-tasks.sppkg`.

Installation Procedure

1. Open the SharePoint admin center and go to **More features** → **Apps** → **Open**.
2. Click **Upload** and select `vitextra.my-tasks.sppkg`.

3. Select **Enable this app and add it to all sites** and click **Enable app**.
4. In the SharePoint admin center, open **Advanced** → **API access** and approve all pending requests of **Vitextra My Tasks: Microsoft Graph** **User.Read**, **User.ReadBasic.All**, **Tasks.ReadWrite** and Azure DevOps **user_impersonation**.

! Important

Without the approval, Planner, To Do, Outlook and Azure DevOps return no tasks. The SharePoint and Project sources need no API permission.

The web parts are now available on every site of the tenant. For details, see [KB10035. How to Install a Vitextra Product in SharePoint Online](#) and [KB10303. My Tasks: Required Permissions, Privacy and Security](#).

Activation

A trial period with full functionality starts automatically after installation. To continue using the product after the trial, purchase a subscription and assign the license to your tenant.

Your tenant ID is shown in the **About** group of the web part properties. For details about subscriptions and license assignment, see [KB10206. Vitextra Licensing and Account: How to Buy and Activate a License](#).

Setup and Configuration

Adding the Web Part to a Page

1. Open a modern page and click **Edit**.
2. Click + in a section and type *My Tasks* in the toolbox search box.
3. Select the **My Tasks** web part.

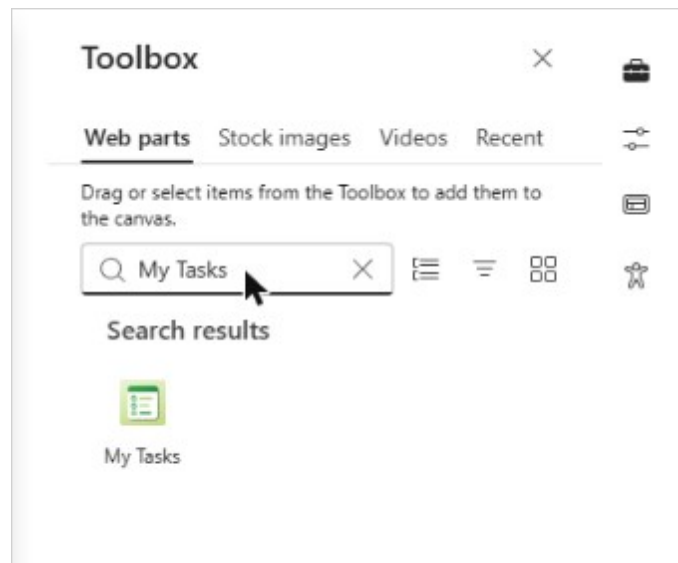


Figure 2. My Tasks in the web part toolbox

The web part works at once with default settings: **Planner**, **SharePoint**, **To Do** and **Outlook** are on, and 10 tasks are shown per page.

Minimal Configuration

Click the **Edit web part** (pencil) icon and expand the **Data Source** group:

1. Switch off the sources that your organization does not use.
2. To show Azure DevOps work items, switch on **Azure DevOps** and enter the **Organization** from the address `dev.azure.com/<organization>`.
3. Switch on **Project** if you use Project Online.

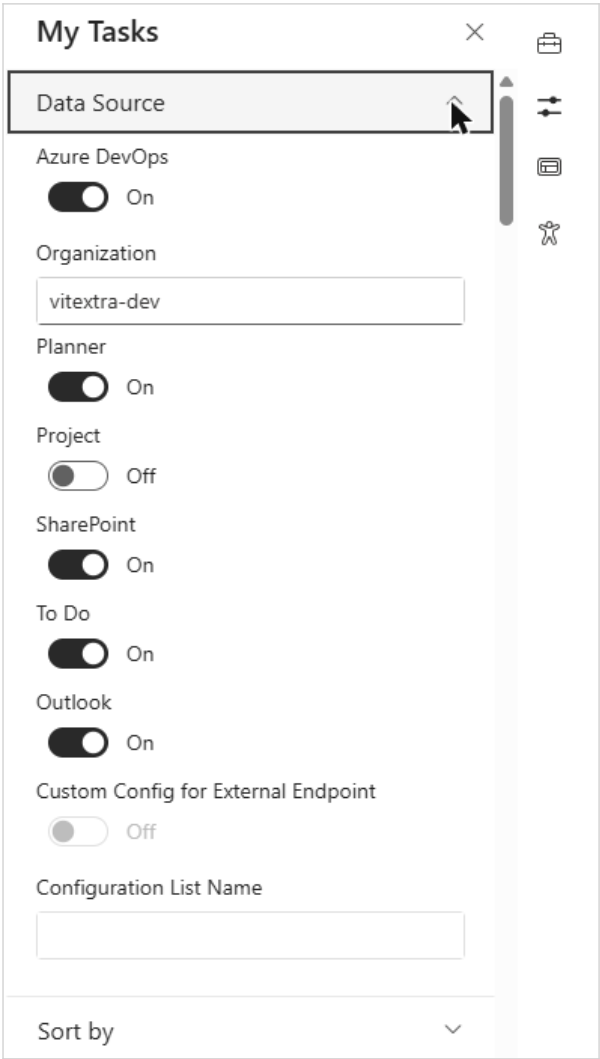


Figure 3. Data Source group

Recommended settings for a first page:

Table 1. Recommended settings

Group	Setting	Recommendation
Sort by	Default sort field	Due Date, Sort A to Z , so that the earliest tasks come first
Row Limit	Total number of results	10–20 tasks with Enable Paging on
Miscellaneous	Excluded Statuses (comma separated)	For example Completed, Closed, to hide finished SharePoint and Azure DevOps tasks
Miscellaneous	Auto refresh	On, for a page that stays open all day
Columns	Visible columns	For a narrow section: Source Icon, Task Name (linked to item), Due Date and Task Status

**Note**

Excluded Statuses must match the text of the **Task Status** column exactly, including the letter case.

Checking the Result

Click **Publish** or **Republish** and open the page. Check that:

- the tasks of every enabled source appear, each with its source icon;
- overdue dates are shown in red and the **Due Date** menu filters the list;
- **Details** shows the properties of a selected task;
- **Export To Excel** downloads a CSV file.

The web part shows only the tasks of the person who views the page. If the list is empty, see [KB10307. Why Are My Tasks Missing or Not Loading?](#).

Showing an Azure DevOps Query

1. Add the **Azure DevOps Query** web part to a page and click **Configure Web Part**.
2. In the **Data Source** group, select the **Organization**, the **Project** and the saved **Query**.
3. Optionally select up to three additional queries; they are shown as tabs.

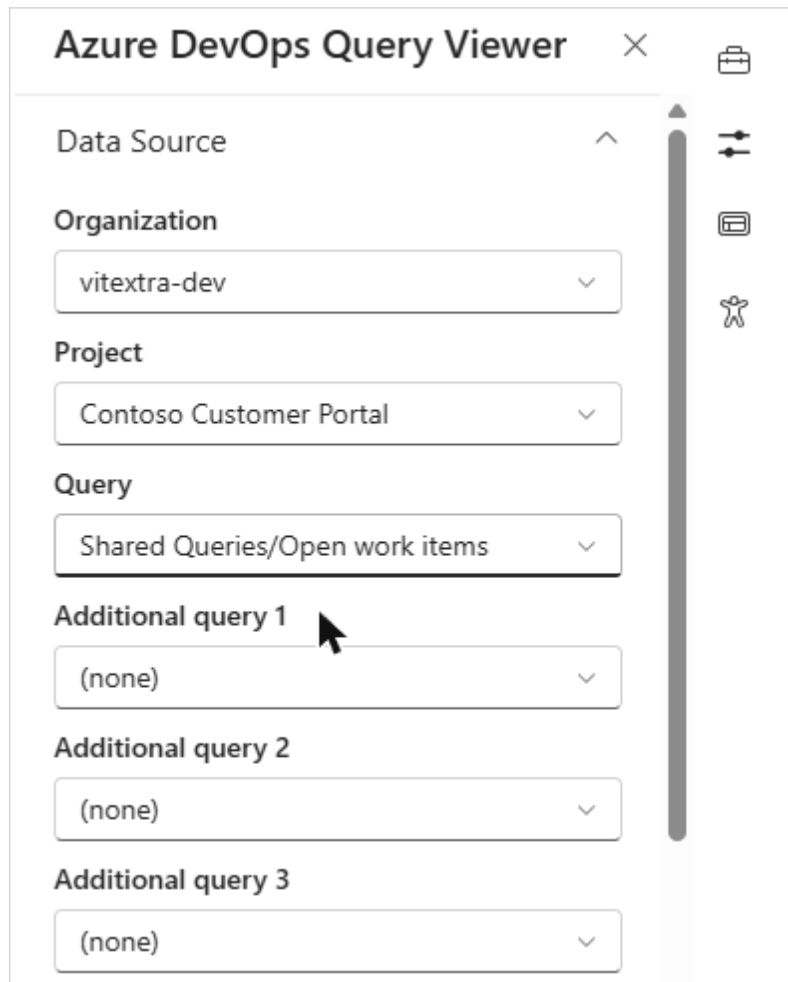


Figure 4. Data Source group of the Azure DevOps Query Viewer

Adding My Tasks to Microsoft Teams

1. In the App Catalog, select **Vitextra My Tasks** and click **Add to Teams**.
2. In Teams, open **Apps** → **Built for your org**, select **My Tasks** and click **Add** to use it as a personal app.
3. To add a channel tab, click **+** in the channel, select **My Tasks**, save the tab and configure the sources in the property pane.

Next Steps

- Learn what each data source loads: [KB10290](#)
- Choose and arrange columns: [KB10294](#)
- Exclude statuses and limit the list: [KB10298](#)
- Enable quick actions in the Azure DevOps Query Viewer: [KB10306](#)
- Read the *My Tasks. Administrator Guide* for all settings, security and troubleshooting.
- Share the *My Tasks. User Guide* with the users of the page.