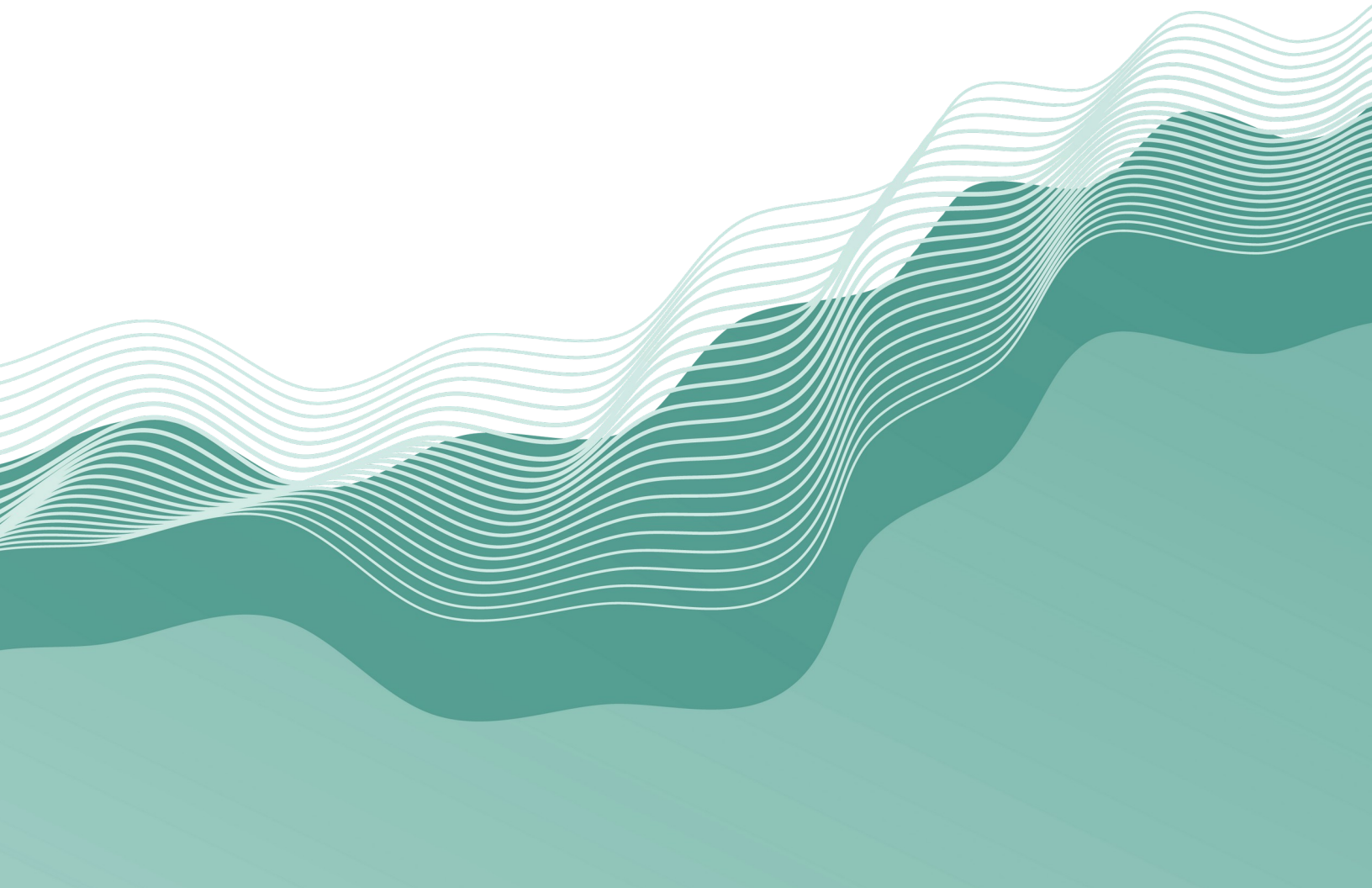




My Tasks

User Guide

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Introduction

About this Guide

This guide is for people who work with My Tasks on a SharePoint page or in Microsoft Teams. It explains how to read your task list, open tasks, view details, filter, sort and export tasks, and how to work with Azure DevOps queries. No administrator rights are needed.

The administrator of the page decides which task sources and columns are shown, so your page may look a little different from the pictures in this guide.

What You Can Do

- See all tasks assigned to you from Planner, To Do, Outlook, SharePoint, Project and Azure DevOps in one list.
- Find overdue tasks and tasks due today or this week.
- Filter by project, source, status, priority and author, and sort the list.
- Read the details of a task without leaving the page and open it in its own application.
- Export your tasks to Excel.
- Work with saved Azure DevOps queries: choose columns, group work items and, if enabled, change them directly.

You always see **only your own tasks**. Your colleagues do not see your tasks, and you do not see theirs.

Where to Find My Tasks

- **On a SharePoint page**, for example on the home page of your intranet.
- **In Microsoft Teams** as a personal app in the left sidebar, or as a tab in a team channel.

Your Task List at a Glance

My Tasks

Refresh

Due Date

Export To Excel

1

Task Name	Project Name	Due Date	Task Status	Priority	Source	Created Date	Author
Review accessibility r...	Contoso Customer P...	10/28/2026	New	2	Azure DevOps	10/17/2026	
Prepare release notes	Contoso Customer P...	10/17/2026	Active	2	Azure DevOps	10/17/2026	
Migrate images to C...	Contoso Customer P...	10/16/2026	Active	1	Azure DevOps	10/17/2026	
Update product catal...	Contoso Customer P...	10/14/2026	Active	1	Azure DevOps	10/17/2026	
Search returns duplic...	Contoso Customer P...		Active	2	Azure DevOps	10/17/2026	
Add wishlist to custo...	Contoso Customer P...		New	2	Azure DevOps	10/17/2026	
Configure email notif...	Contoso Customer P...	10/15/2026	New	3	Azure DevOps	10/17/2026	
Wrong tax rate on in...	Contoso Customer P...		New	1	Azure DevOps	10/17/2026	
Order tracking page	Contoso Customer P...		New	3	Azure DevOps	10/17/2026	
Broken link in footer	Contoso Customer P...		New	3	Azure DevOps	10/17/2026	

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Figure 1. The My Tasks list

Each row is one task. The icon at the start of the row shows where the task comes from:

Table 1. Task sources

Source	What you see in the list
Planner	Planner tasks assigned to you that are not yet 100% complete
To Do	Tasks from your Microsoft To Do lists (except flagged e-mails); completed tasks are not shown
Outlook	E-mails that you have flagged for follow-up; completed ones are not shown
SharePoint	Items of SharePoint task lists where you are in the Assigned To column
Project	Tasks assigned to you on Project Online or Project Server sites
Azure DevOps	Work items assigned to you in Azure DevOps

- The task name and the project name are links when the source provides an address.
- A **Due Date** in red means that the task is overdue.
- The **Author** column is empty for To Do and Outlook tasks; this is normal.
- If you have many tasks, the list is divided into pages; use the pager below the list.

The Command Bar

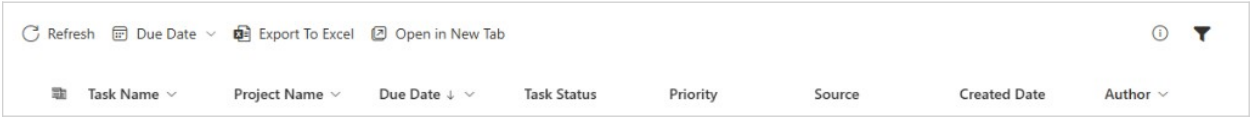


Figure 2. Command bar

Table 2. Commands

Command	What it does
Refresh	Loads your tasks again from all sources
Due Date	Shows only overdue tasks, tasks due today or tasks due this week
Export To Excel	Saves the visible tasks to a file that opens in Excel
Open in New Tab	Appears when a task is selected; opens the task in its application
Details (info icon)	Opens the details of the selected task in a side panel
Filter (funnel icon)	Opens the filter panel; the icon is filled when a filter is applied

To select a task, click its row once. A check box appears when you point at the row. Only one task can be selected at a time.

Opening a Task

You can open a task in its own application, for example Planner or Azure DevOps, in three ways:

1. Click the link in the **Task Name** column.
2. Double-click the row, or select it and press **Enter**.
3. Select the row and click **Open in New Tab** in the command bar, or right-click the row and choose **Open in New Tab**.

The task opens in a new browser tab, so your page stays open.

Viewing Task Details

Select a task and click the **Details** icon. The **Task Details** panel opens on the right side. If you select another row while the panel is open, the panel shows the new task. To close it, click the close icon or anywhere outside the panel.



Figure 3. Task Details panel

Table 3. Properties in the panel

Property	Shown for
Task Name	All sources; a link to the original task
Source, Project Name, Task Status, Priority, Created Date	All sources
Author	Sources that provide an author; not To Do and Outlook
Item Type	Azure DevOps only, for example Bug or Task
Due Date	Tasks that have a due date
Description	To Do, SharePoint and Azure DevOps tasks that have a description

**Tip**

Point at a value and click the **Copy** icon next to it to copy the value to the clipboard.

Due Dates

A date in the **Due Date** column is shown in red when it is earlier than today. A task due today is not red yet. Tasks without a due date have an empty cell.

The **Due Date** menu in the command bar is a quick filter:

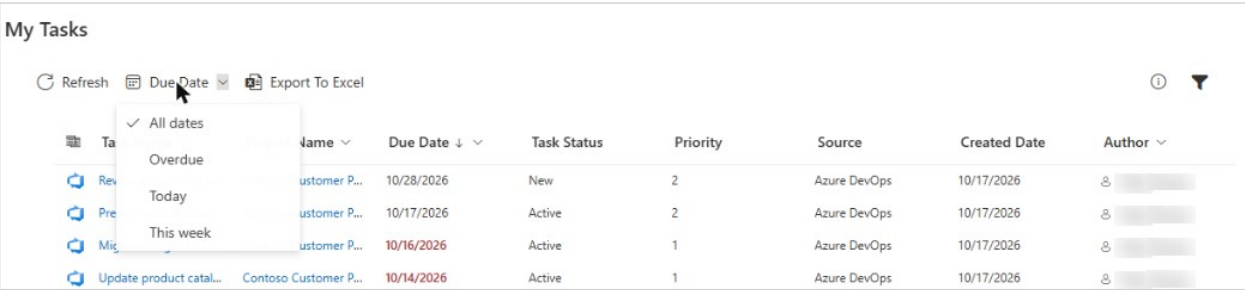


Figure 4. Due Date menu

Table 4. Due Date menu

Choice	Tasks that are shown
All dates	All tasks, with and without a due date (default)
Overdue	Tasks with a due date before today
Today	Tasks due today
This week	Tasks due in the seven days starting with today; overdue tasks are not included



Note

This week is not the calendar week: on a Wednesday it ends on the following Tuesday. Tasks without a due date are shown only with **All dates**.

Filtering and Sorting

The Filter Panel

Click the **Filter** icon on the right side of the command bar. The **Edit Filter Criteria** panel opens with the groups **Project Name**, **Source**, **Task Status**, **Priority** and **Author**. The values are collected from your loaded tasks; a task without a value is listed as **(Empty)**.

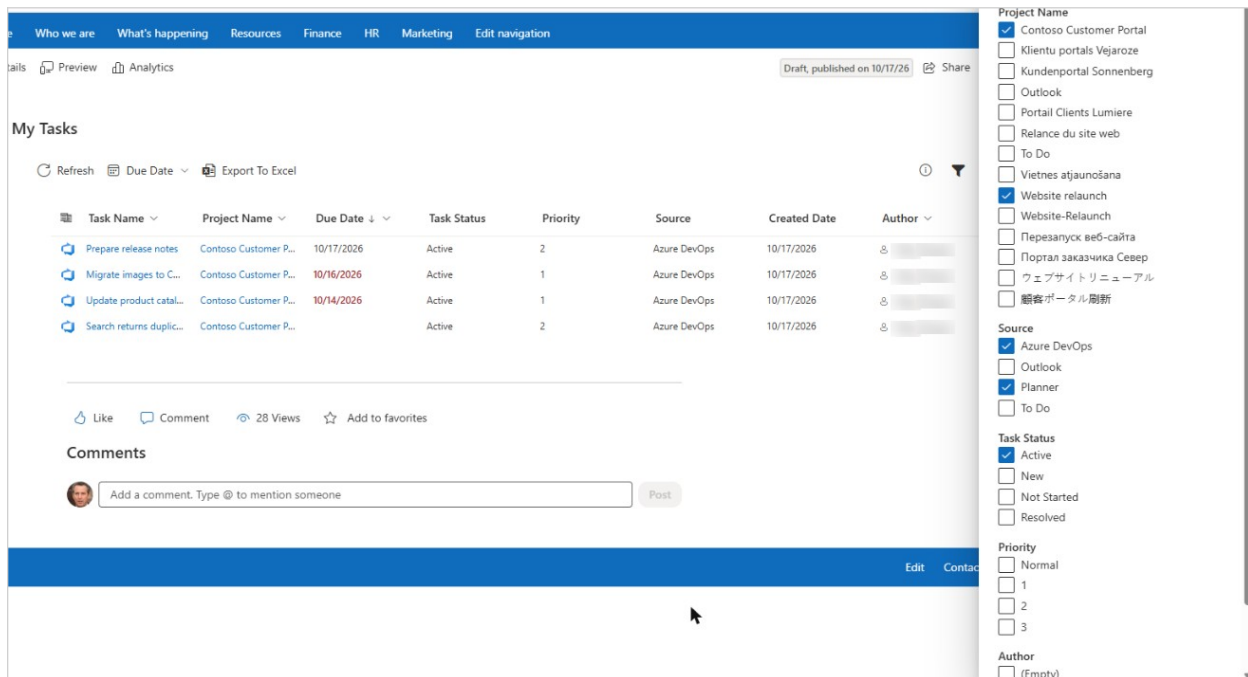


Figure 5. Edit Filter Criteria panel

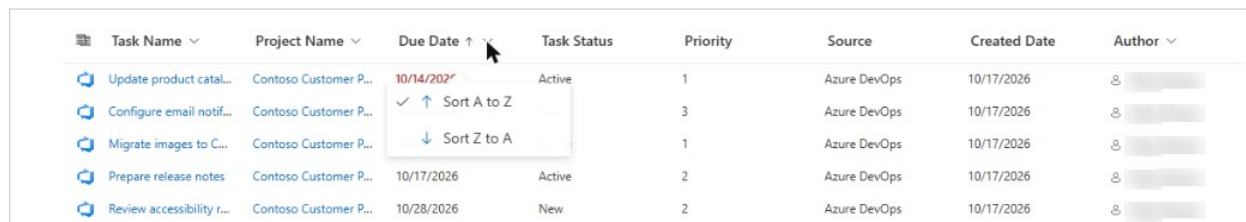
- The list changes as soon as you tick or clear a value; there is no Apply button.
- Values in one group are combined with OR, different groups with AND. A group without ticked values is ignored.
- The **Due Date** menu is one more condition combined with AND.
- When a filter is applied, the **Filter** icon is filled.

Note

As soon as you tick a value in the **Author** group, To Do and Outlook tasks are hidden because they have no author.

Sorting

Click the header of the **Task Name**, **Project Name**, **Due Date** or **Author** column and choose **Sort A to Z** or **Sort Z to A**. For dates, A to Z means from the earliest to the latest. Sorting applies to all tasks, not only to the current page.



Task Name	Project Name	Due Date	Task Status	Priority	Source	Created Date	Author
Update product catal...	Contoso Customer P...	10/14/2026	Active	1	Azure DevOps	10/17/2026	
Configure email notif...	Contoso Customer P...			3	Azure DevOps	10/17/2026	
Migrate images to C...	Contoso Customer P...			1	Azure DevOps	10/17/2026	
Prepare release notes	Contoso Customer P...	10/17/2026	Active	2	Azure DevOps	10/17/2026	
Review accessibility r...	Contoso Customer P...	10/28/2026	New	2	Azure DevOps	10/17/2026	

Figure 6. Column header menu

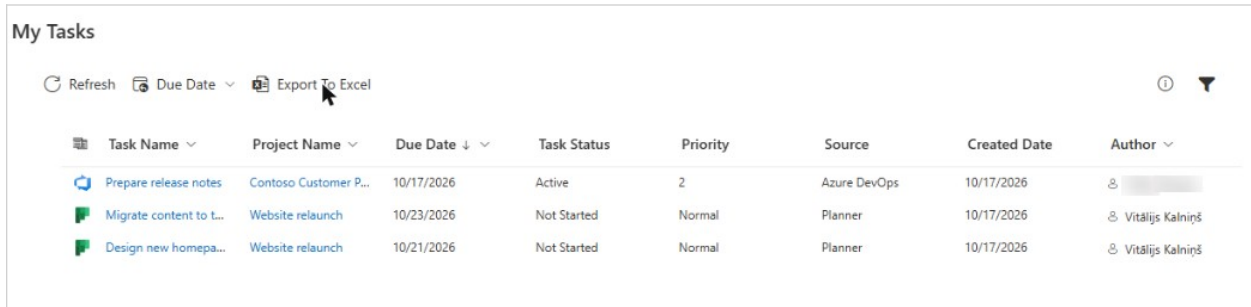
Your View Is Remembered

Your sorting, the **Due Date** choice and the filter selections are saved in your browser for each My Tasks web part and restored on your next visit. They apply only to you and are not shared with other users or between browsers and devices; they can be lost when you clear the browser data or use a private window.

To reset your view, clear all values in the filter panel and choose **All dates** in the **Due Date** menu.

Exporting to Excel

Click **Export To Excel** in the command bar. The browser downloads the file `my-tasks-<date>.csv`, for example `my-tasks-2026-10-16.csv`.



The screenshot shows a web interface titled "My Tasks". At the top, there is a command bar with a "Refresh" button, a "Due Date" dropdown, and an "Export To Excel" button. Below the command bar is a table with the following columns: Task Name, Project Name, Due Date, Task Status, Priority, Source, Created Date, and Author. The table contains three rows of task data.

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 homopa...	Website relaunch	10/21/2026	Not Started	Normal	Planner	10/17/2026	Vitālijs Kalniņš

Figure 7. Export To Excel

- The file contains the tasks that you see after your filters and sorting, from **all pages**.
- The columns are fixed: **Source, Task Name, Project Name, Task Status, Priority, Created Date, Due Date, Author, Tags** and **URL**.
- The button is unavailable while the list is loading or when there are no tasks.

Note

The file is a CSV file in UTF-8, not an .xlsx workbook. If Excel shows all data in one column, open a blank workbook, choose **Data** → **From Text/CSV**, select the file, set **Delimiter** to **Comma** and click **Load**.

Azure DevOps Queries

The **Azure DevOps Query** web part shows the result of a query saved in Azure DevOps. You see only the work items that you are allowed to see in Azure DevOps.

Azure DevOps Query

Refresh Columns Group by Updated 3:59 PM

ID	Work Item Type	Title	State	Assigned To	Tags
133	Task	Update product catalog images	Active	Vitālijs Kalniņš	catalog
140	Task	Migrate images to CDN	Active	Vitālijs Kalniņš	cdn
137	Bug	Wrong tax rate on invoices	New	Vitālijs Kalniņš	billing
77	Bug	Wrong tax rate on invoices	Resolved	Vitālijs Kalniņš	billing
74	Bug	Search returns duplicate results	Active	Vitālijs Kalniņš	search
73	Task	Update product catalog images	New	Vitālijs Kalniņš	catalog
9	User Story	Online payment by card	Active	Vitālijs Kalniņš	payments
5	Bug	Checkout button unresponsive in Safari	New	Vitālijs Kalniņš	regression
1	Bug	Fix login timeout on mobile	Active	Vitālijs Kalniņš	critical
138	Task	Prepare release notes	Active	Vitālijs Kalniņš	release

Navigation: << < 1 2 3 > >>

Figure 8. Azure DevOps Query web part

Tabs, Sorting and Grouping

- If the page shows several queries, click a tab above the command bar to switch between them.
- Click a column header to sort: the first click sorts ascending, the second descending, the third returns the order of the query.
- Open **Group by** and choose a column to divide the rows into groups that you can collapse; **No grouping** removes the groups.
- Double-click a row or press **Enter** to open the work item in Azure DevOps.
- **Refresh** reloads the data; **Updated** shows the time of the last load.

Tree queries are shown as an expandable hierarchy; in them, sorting and grouping are not available.

Choosing Columns

1. Click **Columns** in the command bar.
2. Type part of a field name in **Search fields** to find it quickly.
3. Tick the fields to show and clear the ones you do not need.
4. Click outside the callout to close it.

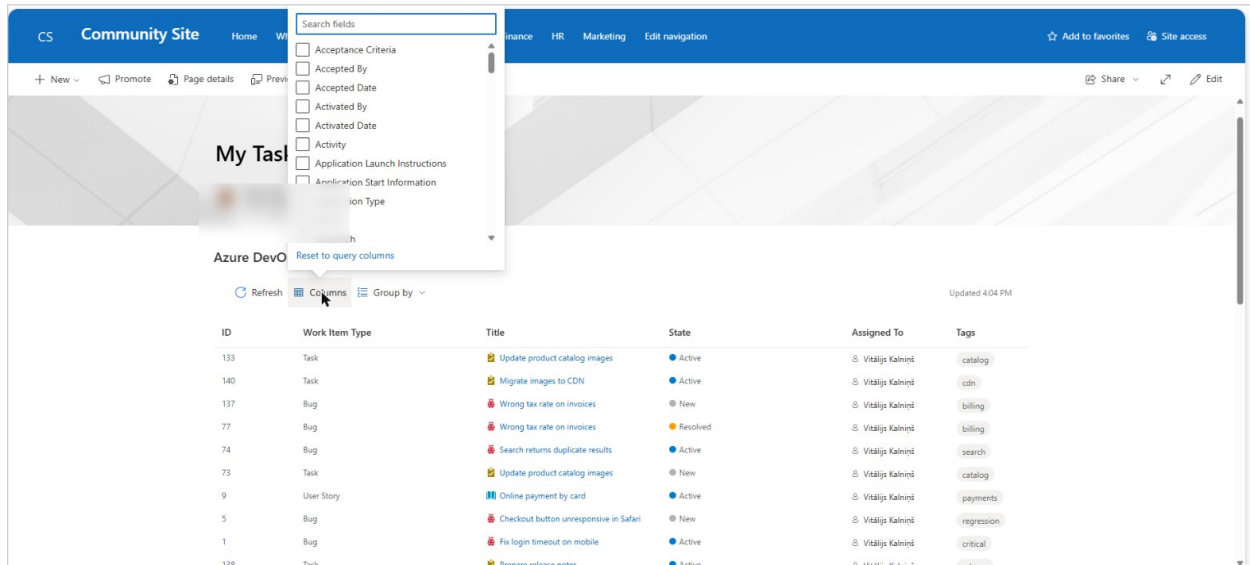


Figure 9. Columns callout

To return to the columns of the query, click **Reset to query columns**. Your columns and grouping are remembered in your browser for each query.



Note

Search fields only searches the list of fields in the callout. It does not search the work items.

Quick Actions

If your administrator has turned on quick actions, every row has an **Actions (...)** button:

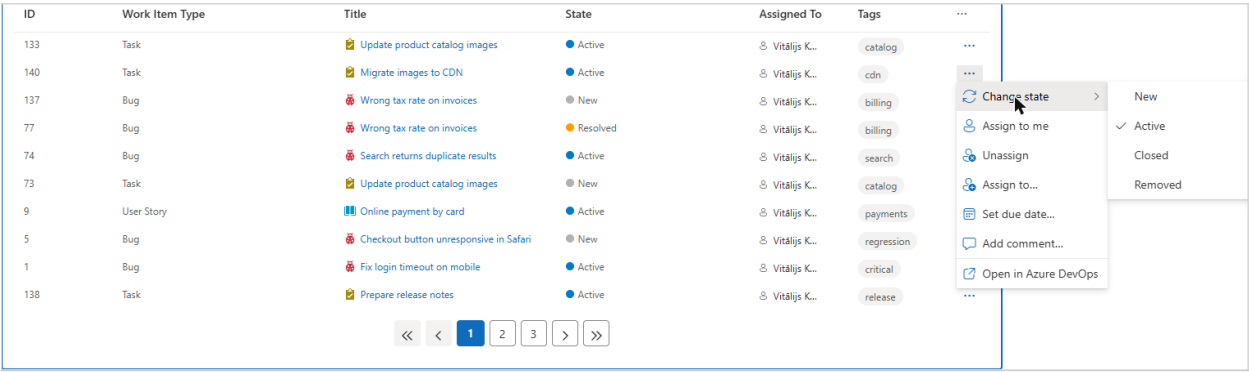


Figure 10. Actions menu

Table 5. Quick actions

Menu item	What it does
Change state	Moves the work item to another state
Assign to me	Assigns the work item to you
Unassign	Clears Assigned To
Assign to...	Assigns the work item to the person entered in User name or email
Set due date...	Sets the due date or removes it with Clear date
Add comment...	Adds a comment to the discussion of the work item
Open in Azure DevOps	Opens the work item in a new tab

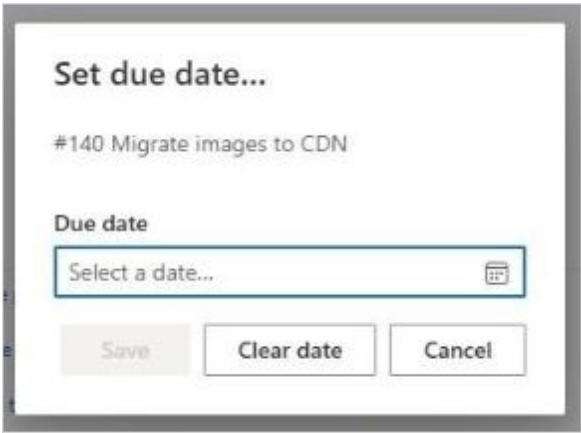


Figure 11. Set due date dialog

! Important

Quick actions change the real work item in Azure DevOps under your name. There is no undo; to revert a change, make the opposite change. If Azure DevOps rejects a change, *Update failed* is shown and the work item stays as it was.

My Tasks in Microsoft Teams

To add My Tasks as a personal app, click **Apps** in Teams, select **Built for your org**, find **My Tasks** and click **Add**. In a channel tab, My Tasks also shows only your own tasks. My Tasks follows the Teams theme, including the dark theme, and works in the Teams mobile app.

Tips and Troubleshooting

The list is empty or shorter than expected.

Check whether a filter is active: the **Filter** icon is filled, or the **Due Date** menu is not set to **All dates**. Then check in the source application that the task is assigned to you and is not completed.

A task I just created or completed does not appear or disappear.

The list opens with the data of your last visit and is refreshed in the background. Click **Refresh**. SharePoint and Project tasks can appear with a delay because they are found through search.

I cannot change or complete a task.

My Tasks only shows tasks. Open the task with **Open in New Tab** and change it in its application. Only the Azure DevOps Query web part can change work items, if quick actions are enabled.

My filters are gone.

Your view is stored in the browser. It is not available in another browser, on another device or in a private window.

The web part shows a message about the trial.

The trial period has ended. Contact the administrator of your site.

Additional Resources

- [KB10291. My Tasks: A Quick Guide for End Users](#)
- [KB10292. My Tasks: Due Date Column, Overdue Highlighting and Quick Filters](#)
- [KB10293. My Tasks: Filtering, Sorting and Personal View Settings](#)
- [KB10296. How to Export My Tasks to Excel](#)
- [KB10305. Azure DevOps Query Viewer: Multiple Query Tabs, Grouping, Search and Column Reset](#)
- [KB10307. Why Are My Tasks Missing or Not Loading?](#)