KNOWLEDGE BASE ARTICLE

How to Add and Configure the My Tasks Web Part

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Overview

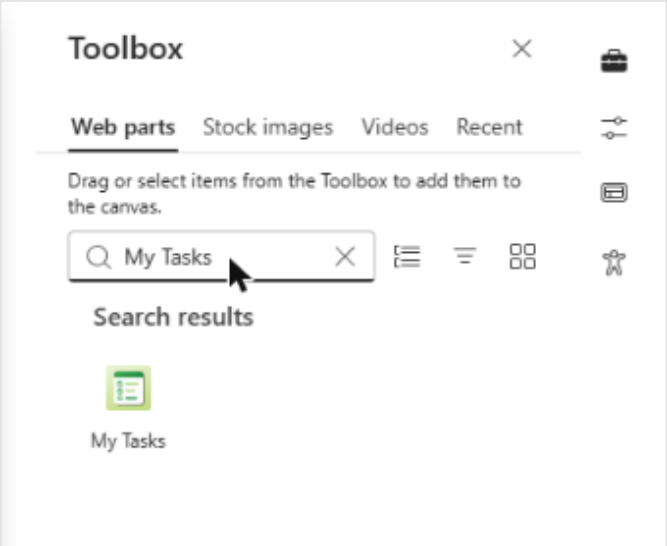
After the solution is installed, the **My Tasks** web part is added to a SharePoint page like any other web part. A new web part already works with sensible defaults, so you often only need to choose the data sources. This article describes how to add the web part, what each group of the property pane does and how to check the result.

Before you start

- The My Tasks solution is installed in the App Catalog and added to the site. See KB10035. How to Install a Vitextra Product in SharePoint Online. To install a new version of the solution, see KB10050. How to Update a Vitextra SPFx Solution in SharePoint Online.
- A tenant administrator has approved the API permission requests of the solution in the SharePoint admin center (**Advanced > API access**). See KB10303. My Tasks: Required Permissions, Privacy and Security.
- You can edit the page.
- You have a trial or a license. See KB10206. Vitextra Licensing and Account: How to Buy and Activate a License.

How to add the web part

1 Open the SharePoint page where the list should appear and click **Edit**.
2 Click the **+** icon in the place where the web part should be.
3 In the search box, type **My Tasks** and select the web part from the results.
4 Click the web part, then click the **Edit web part** (pencil) icon on its left to open the property pane.
5 Choose the data sources and adjust the other settings (see below).
6 Optionally click the title area and enter your own **Web Part Title**.
7 Click **Republish** (or **Publish**) to make the page available to others.



Finding the My Tasks web part in the toolbox

Note

The My Tasks web part can be placed in any section of a page. It also supports a full-width section and can be used on a full-page app page. In Microsoft Teams it works as a personal app and as a tab; see KB10301. How to Add My Tasks to Microsoft Teams.

The property pane

The settings are grouped in an accordion. Most changes are applied immediately without reloading the page.

Group	What you set there
Data Source	Toggles for **Azure DevOps**, **Planner**, **Project**, **SharePoint**, **To Do** and **Outlook**. The **Organization** field appears for Azure DevOps.
Sort by	The default sort column (**Task Name**, **Created Date**, **Due Date**, **Source**, **Priority** or **Task Status**) and the direction.
Row Limit	The slider **Total number of results** (5 to 50) and the toggle **Enable Paging**.
Appearance	The toggle **Compact List**.

Group	What you set there
Miscellaneous	**Excluded Statuses (comma separated)** and **Auto refresh**.
Columns	Which columns are shown and in which order.
About	License information.

Data Source

Switch on every source whose tasks should appear. A new web part has **Planner**, **SharePoint**, **To Do** and **Outlook** switched on. **Azure DevOps** and **Project** are off. If all sources are switched off, the list is empty.

To show Azure DevOps work items, switch on **Azure DevOps** and enter the **Organization**: the name that you see in the address `dev.azure.com/<organization>`, for example *contoso*. Descriptions and requirements of all sources are in KB10290. My Tasks Data Sources: Planner, To Do, Outlook, SharePoint, Project Online and Azure DevOps.

Sort by, Row Limit and Appearance

By default the list is sorted by **Created Date**, newest first. The default page size is 10 tasks and paging is on. Change the number with the **Total number of results** slider. If **Enable Paging** is off, only the first page is shown. The **Compact List** toggle reduces the row height. Users can still change the sorting for themselves; see KB10293. My Tasks: Filtering, Sorting and Personal View Settings and KB10297. My Tasks: Paging, Row Limit, Auto Refresh and Instant Loading.

Miscellaneous

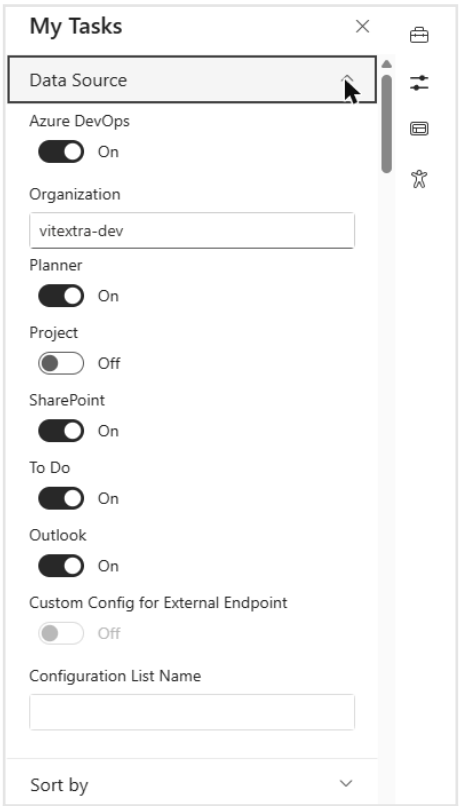
In **Excluded Statuses (comma separated)** enter the status names that should be hidden for all users, for example `Completed, Deferred`. The names must match the text of the **Task Status** column exactly. The **Auto refresh** toggle reloads the list every 60 seconds without a loading indicator. See KB10298. My Tasks: Excluding Statuses and Limiting the Task List.

Columns

Tick the columns to show and drag them up or down to change the order. See KB10294. My Tasks: Choosing and Arranging Columns.

About

The group shows the license status: trial (with the number of remaining days), active, expired, suspended or canceled.



The Data Source group of the My Tasks property pane

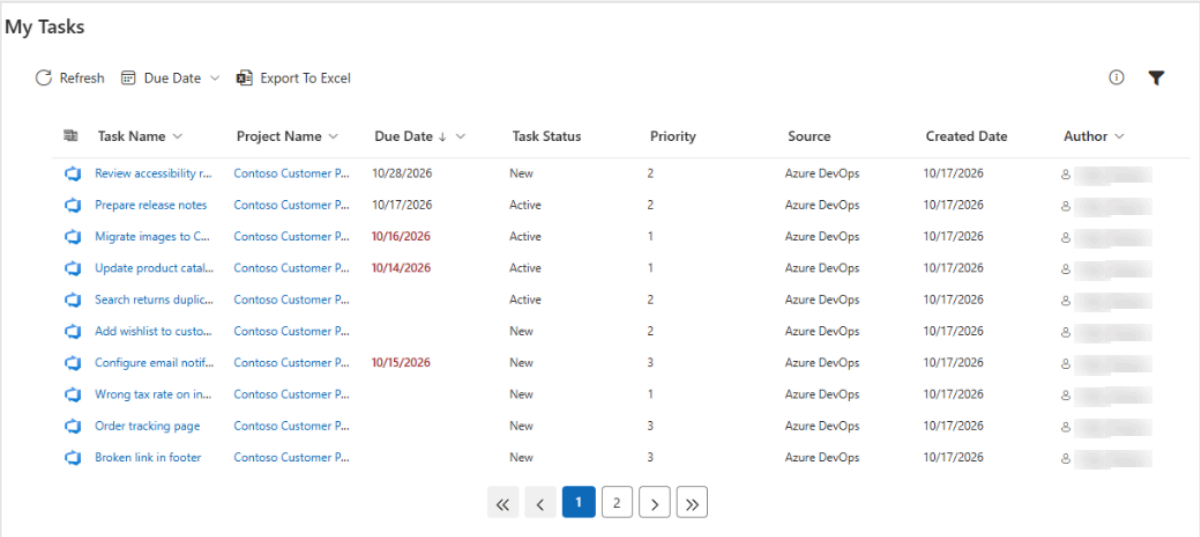
Warning

The web part shows only tasks that are assigned to the person who views the page. If you see an empty list while editing, check that you are assigned to tasks in the enabled sources. A source that cannot be loaded, for example because an API permission was not approved, is skipped without an error message and the other sources still appear.

Check the result

1 Save or republish the page and reload it.
2 Make sure that the tasks of every enabled source appear. The first column shows the source icon.
3 Test the command bar: **Refresh**, the **Due Date** menu, **Export To Excel** and the **Filter** panel.

4 Select a task and open **Details** to see its properties.



The configured My Tasks web part

Tip

You can add several My Tasks web parts to one page or to different pages, each with its own sources and columns. Each user's sorting and filters are remembered separately for every web part. For a short guide for your colleagues, share KB10291. My Tasks: A Quick Guide for End Users. If no tasks appear, see KB10307. Why Are My Tasks Missing or Not Loading?.