KNOWLEDGE BASE ARTICLE

My Tasks: Filtering, Sorting and Personal View Settings

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Overview

When you have many tasks, you need a way to see only the ones that matter. My Tasks offers a filter panel, a quick filter by due date and sorting from the column headers. Your choices are remembered, so the **list** looks the same when you come back. This article explains how filters combine, how sorting works, what exactly is remembered and where, and how to reset everything.

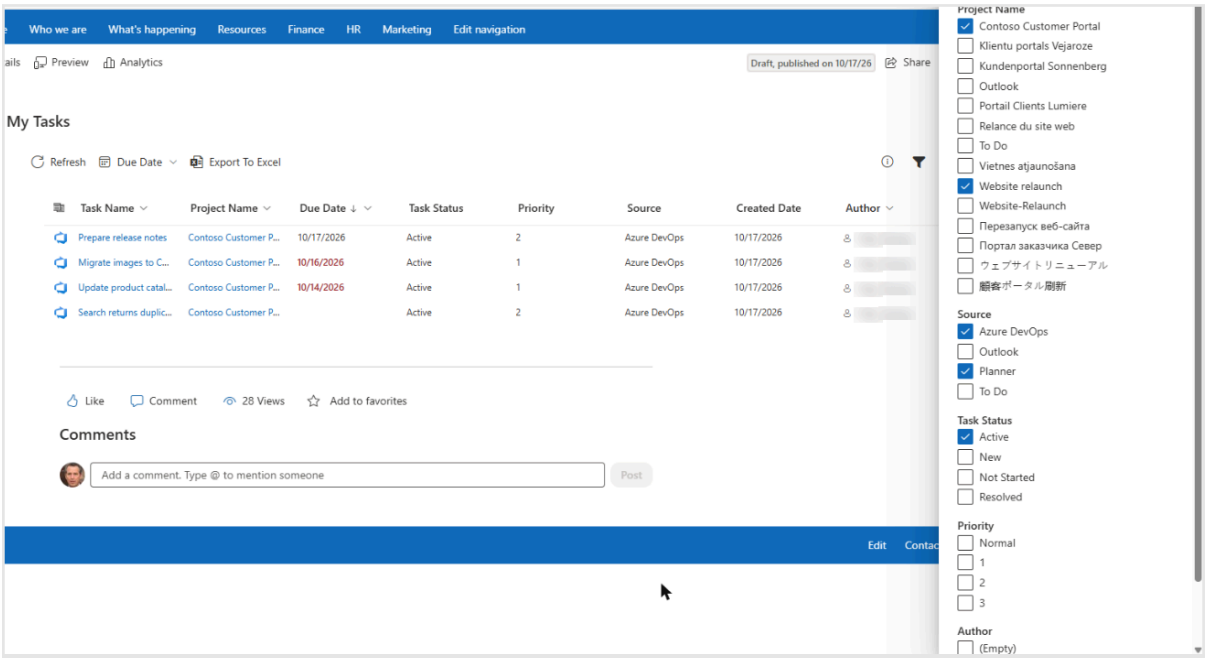
The filter panel

Click the **Filter** icon on the right side of the command bar. The **Edit Filter Criteria** panel opens beside the list. It contains five groups:

- **Project Name**
- **Source**
- **Task Status**
- **Priority**
- **Author**

Each group is a list of check boxes. The values are not typed in: they are collected automatically from the tasks that are loaded now. If you have Planner and To Do tasks only, the **Source** group offers only these two values. A task that has no value in a group is listed as **(Empty)**.

There is no Apply button. The list changes as soon as you tick or untick a value, and the page navigator goes back to the first page. You can keep the panel open while you work with the list, and close it with the cross in the corner or by clicking outside of it. When at least one value is ticked, the **Filter** icon is shown filled, so you can see that the list is filtered.



The Edit Filter Criteria panel

How the filters combine

- **Within one group the values are combined with OR.** If you tick *Planner* and *To Do* in **Source**, you see tasks from Planner **or** To Do.
- **Different groups are combined with AND.** If you also tick *In Progress* in **Task Status**, you see only tasks that are from Planner or To Do **and** are in progress.
- A group where nothing is ticked is ignored.
- The **Due Date** menu in the command bar is one more condition with AND. See KB10292. My Tasks: Due Date Column, Overdue Highlighting and Quick Filters.

Note

Tasks that have no author (To Do and Outlook tasks) are hidden as soon as you tick any value in the **Author** group, because these tasks cannot match a name. Untick the author to see them again.

Sorting

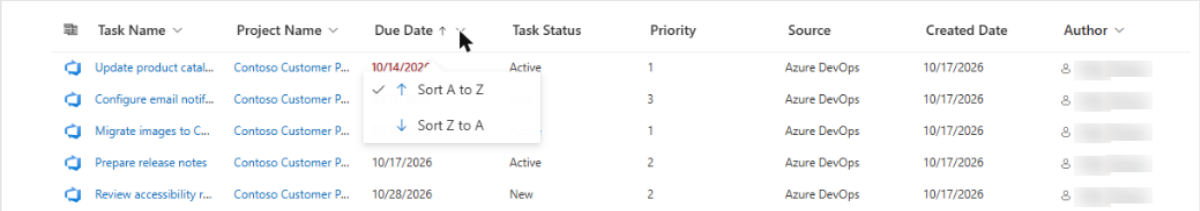
Sorting from a column header

Click a column header. A menu opens with two commands, **Sort A to Z** and **Sort Z to A**; a check mark shows the current direction. The list is re-sorted at once. For dates, A to Z means from the earliest to the latest date.

The menu is available in the columns **Task Name**, **Project Name**, **Due Date** and **Author**.

The columns for the source icon, **Created Date**, **Task Status**, **Priority**, attachments and comments have no header menu, so you cannot sort by them from the page; use the filter panel to narrow the list by status or priority instead. The administrator can still make one of them the default sort order, as described below.

Sorting is applied to all the loaded tasks and then the list is divided into pages, so the first page always shows the first tasks in the chosen order.



The column header menu

The default sort order set by the administrator

In the **web part** settings, the administrator selects the default sorting in the group **Sort by**: the field (**Task Name**, **Created Date**, **Due Date**, **Source**, **Priority** or **Task Status**) and the direction (**Sort A to Z** or **Sort Z to A**). This order is what every user sees on the first visit. As soon as you choose your own sorting in a column header, your choice is remembered in your browser and used instead of the default. See KB10289. How to Add and Configure the My Tasks Web Part.

Personal view settings

My Tasks remembers the way you set up the list. These settings are saved:

Setting	Remembered
Sorting	The column and the direction
Due date quick filter	The selected item of the **Due Date** menu
Filter panel	The ticked values in all groups

When you open the page again, the web part applies them as soon as the tasks are loaded. The following is **not** remembered: the page you were on, the selected task and the open panels.

Where the settings are stored

The settings are saved in the **local storage of your browser** (`localStorage`). This has

several consequences:

- They are stored separately for **each browser and each device**. If you sign in from another computer, from another browser or from the **Teams app**, you start with the default **view** there.
- They are stored separately for **each My Tasks web part** (each instance). Two web parts on different pages remember their own filters.
- They belong to you only. Other users, and the administrator, do not see them, and they are not sent to Vitextra or saved in **Microsoft 365**.
- They can disappear when you clear the browser data, and they may not be kept in a private (InPrivate or Incognito) window.

How to reset your view

1 Click the **Filter** icon and untick all the values in all groups.
2 Open the **Due Date** menu and choose **All dates**.
3 If you want the default order back, clear the **site** data of your browser (see below). Sorting can otherwise be changed only by choosing another column or direction.

To reset everything in one step, clear the browser data for the **SharePoint** site: in your browser settings, open the site data or cookies section, find your **tenant** address (`<tenant>.sharepoint.com`) and remove the stored data. Be aware that this also signs you out of some sites and removes the saved settings of other SharePoint web parts.

Warning

If the list looks incomplete after you have returned to the page, an old filter may still be active. Check that the **Filter** icon is not filled and that the **Due Date** menu shows **All dates**. If tasks are still missing, see KB10307. Why Are My Tasks Missing or Not Loading?.

Tip

Create your favorite view once, for example **Due Date** = **This week**, **Source** = **Azure DevOps** and sorting by **Due Date**, and it will be waiting for you every day. The export in KB10296. How to Export My Tasks to Excel saves exactly the tasks of your current view.

Terms

Azure DevOps
Azure DevOps Services (formerly Visual Studio Team Services) is a cloud-based product that provides version control, requirements management, automated pipelines for builds and releases, and testing capabilities.

List
A list is a storage unit in SharePoint. A list can contain columns of different types, content types, and views. A document library is a special type of list and therefore inherits the functionality of a list.

Microsoft 365
Microsoft 365 is a cloud-based subscription service that combines productivity apps such as Word, Excel, PowerPoint, and Outlook with cloud services such as SharePoint, OneDrive, Teams, and Exchange Online, together with advanced security and device management.

SharePoint
SharePoint is a web-based collaboration platform that provides content management, document management, workflow applications, search, and other tools that empower employees and teams to work together. SharePoint is also a secure place to store, organize, and access shared information.

Site
A SharePoint site is a container for information within the SharePoint platform. Sites typically offer features such as document libraries, lists, calendars, discussion boards, and workflows, facilitating collaboration, communication, and document management within teams or across departments. Sites can be customized and configured to suit the specific needs and workflows of an organization.

Teams App
A Teams app is an application that extends Microsoft Teams with capabilities such as tabs, bots, message extensions, and meeting extensions. Teams apps are distributed as app packages through the Teams app store, AppSource, or the organization's catalog.

Tenant

Terms

A Microsoft 365 tenant is a dedicated instance of Microsoft 365 services. The tenant holds the organization's information, such as users and domains (Microsoft Entra ID), configurations, subscriptions, and services. An organization receives a tenant by signing up for Microsoft 365 services.

View
A view is a saved configuration that determines which items of a list or library are displayed and how, including the columns, sorting, filtering, grouping, and layout. Views can be personal or public.

Web Part
A web part is a primary building block of functionality or content placed on a SharePoint page. Some web parts support customization, such as configuring the web part or changing its appearance.