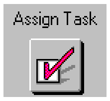
Lesson 4

Objectives:

Upon completion of this lesson you will be able to:

- Create a Personal and Group task
- Respond To a Task
- Delegate a Task
- Completing a Task
- Track the Status Of a Task
- Schedule a Recurring Task
- Use Notes Effectively



Tasks

Learning to use tasks is a habit, much like making a paper task list. If you are a task oriented person using an electronic task list should be easy. It eliminates creating and eventually losing a paper “to do” list and makes it easy to assign tasks to others. Most of your correspondence should still be in the form of mail messages. Tasks differ from mail messages in that they require action and must be completed before they are removed from a calendar. As with appointments, you may schedule personal tasks or tasks for other people.

Creating a Personal Task

The four available view for creating a task are the same as for scheduling a meeting. Two of the options will allow you to schedule a personal task. One allows an attachment and the other is to schedule a task without an attachment. Tasks can be scheduled from a Calendar view that displays tasks, from the **Send** menu of the Main GroupWise window or from the Task icon at the bottom of the Main GroupWise window.

⇨ Remember if you inadvertently choose the wrong view you may change with the Switch button to another view without having to go back to the Main GroupWise window.

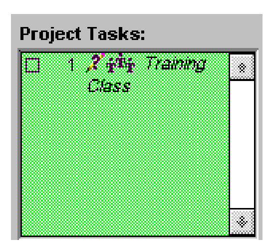
Open any Calendar view that includes tasks, such as, the Week view. To schedule a personal task double click on the day you wish to schedule the task for. After supplying a subject and the message text, select the date that the task is to begin on and it’s due date. You may assign a priority to the task if you want. Any task not completed by the due date will appear in red on your calendar indicating that it is overdue.

Sending a Group Task

Suppose you need to send a task to someone to review a memo that is due in a week. In this case, not only do you need to assign a task, but you need to attach a file to the task. One way to send a task is to select Task from the list box under the Assign Task icon in the Main GroupWise window. The only difference between the personal and group appointment is that on a group task you must fill in the **To:** box and any **CC:** or **BC:** recipients.

To attach the memo file click on the paper clip icon in the Task To: dialog box. Choose Attach File and select the file to be attached. Click on **OK** and then **Close**. Select Send to send the task.

Responding To a Task

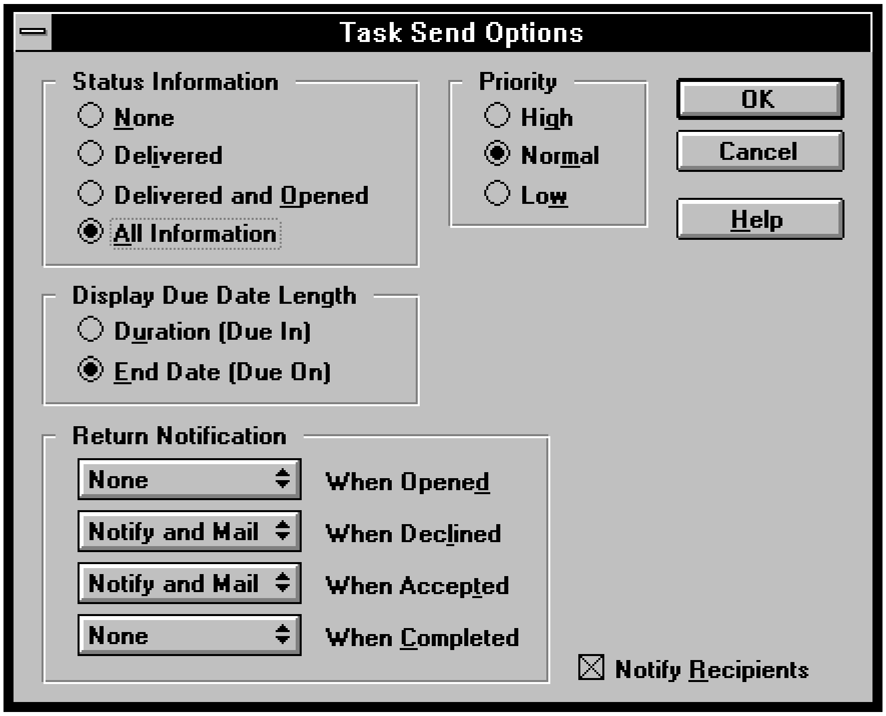


Tasks, like appointments, may be declined, accepted, deleted or delegated. Open a calendar view that displays tasks. The task will appear as an icon with a question mark next to it. The question mark indicates that GroupWise is waiting for your response. You may Accept or Decline with a comment or choose Delegate from the **Actions** menu.

Tasks may also be moved, rescheduled, and retracted the same as appointments.

Tracking the Status of a Task

As with other items, to track the status of a task, choose the task in your Out-Box and look at the information. Clicking on the item with the right mouse button will display a QuickMenu with an Info option. Make sure you are tracking all information through Preferences and keep in mind it may be helpful to ask for return notification on all declined and accepted tasks.



You may even want a return notification when an item has been marked completed. From your Out-Box a quick way of looking at information or reviewing the original task is to use the QuickMenu. This can be accessed by selecting the item and clicking the right mouse button.

Scheduling a Recurring Task

If you need to prepare a presentation before each monthly staff meeting or perhaps, send out the minutes of the meeting within three days you can schedule recurring tasks, just like recurring appointments.

Completing a Task

Once a task has been completed, you will need to mark it completed so that it will not be carried forward. If the sender of the task requested notification, they will be informed that the task has been completed. To mark a task complete from your calendar click on the check box next to the task to place a check mark in the box.

Using Notes

Creating a note is identical to creating a mail message with a few exceptions. The Note Send dialog box has a Date field so that a note can be placed on a calendar in the future. There are four views, just like appointments and tasks; two for personal notices and two for public, one with an attachment and one without. Notes will appear on your Calendar view and may be accepted, declined, delegated or deleted.

Exercises

Creating a Task

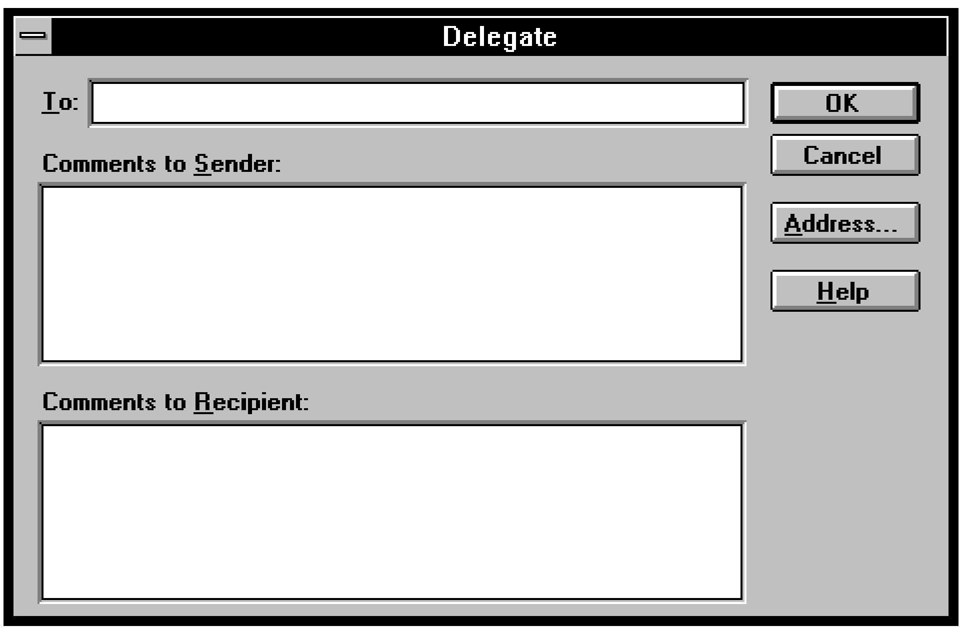
Create a task for a classmate that will be due one week from today.

1. Select New Task from the **Send** menu.
2. Fill in the appropriate boxes.
3. Include today as the Start Date and indicate that the project is due one week from today.
4. Click on Send.

Delegating a Task

You will receive a task from the exercise above in your In-Box. Delegate the task to someone else and let them know you just don't have time.

1. Open the task from your In-Box or any Calendar view that displays tasks by double-clicking on it.
2. Choose Delegate from the **Actions** menu.



3. Fill in the recipient id and a comment. Then click on **OK**.

That was fun, wasn't it?

Marking a Task as Completed

Accept and mark the task above as completed.

1. Double-click on the task to open it and click on Accept.

Mark the task completed on your calendar by clicking on the check mark next to the task.

Creating a Recurring Note

You would like to create a note that will remind you to pay the office supply invoice every 21 days. The first reminder will fall on the first Monday of next month. You will need to use the periodic creation method for recurring dates.

1. Choose Personal Note from the Note drop down list box.
2. Fill in an appropriate subject and text message.
3. Click on the calendar icon to the right of start date.
4. Choose Auto-Date.
5. Indicate the start date as the first Monday of next month.
6. Let's select all months by double-clicking in the months box.
7. Change Days of the Weeks to Periodic and indicate every 21 days.
8. Click on OK to exit the Auto-Date dialog box and then OK again to send the message.

Verify that the note was placed on your calendar correctly.

Tracking the Status of a Sent Items

Spend a few minutes looking at your Out-Box to track the Info of the items sent in this exercise. Remember, you can right click on any item in your Out-Box and choose Info.