

# To Do: Nada

*GroupWise 8 Power User Tips--Using Rules with Tasks*

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One thing more satisfying than a completely checked-off To-Do list is a To-Do list that doesn't exist. Imagine each item not only being marked complete, but also disappearing completely. With the new completed item parameter in GroupWise 8 rules, you can make your tasks disappear and keep your task list clean giving you a blank canvas to work with each day.

But filing your completed tasks is not the only magic act GroupWise rules can help you perform with tasks. Following are a few real-life task challenges GroupWise 8 can help you tackle.

## > File it away

### Challenge

Since many of your e-mail messages contain implied tasks, you've fallen into the habit of moving each message that is task-oriented to your task list. In fact, you've probably even created a Home View panel next to your inbox that you use for just that purpose. As you complete the items on your list, you diligently check them off and GroupWise automatically moves them to the bottom of your task list. But lately, your task list has started to get crowded with all the tasks you've been completing. It would really help if the tasks you complete would not only move to the bottom of your list, but instead simply disappear from your main task list when you mark them as completed.

### Solution

Create rules to move your completed tasks to project-specific folders in your cabinet. As a GroupWise power user, you already know how to create a basic rule, so you don't need a step-by-step guide. Instead, just make sure you create your folders first and then set up a rule with the following conditions. (See Figure 1.)

#### When Event is Completed Item

**Act on items** where subject contains [a keyword for your project] (Click the Define Conditions button to create this parameter.)

**Then actions are** move to folder [Select the project specific folder you've created.]

Create a similar rule for each project you're working on and your tasks will begin to disappear from your task list as you complete them. If you're using the rule to clean up your task list, just select all the tasks in your list and then click **Tools | Rules**. Click the **Run** button and the rule will execute manually to quickly organize and clean up your crowded task list.

## > Updating the Taskmaster

### Challenge

Your supervisor is big on tasks. He discovered he could send them using GroupWise and he hasn't gone back. Sound familiar? As a result, you have a task list full of assigned tasks. Of course, your taskmaster wants to know each time you complete an item he has assigned you, but replying to his tasks after you mark them complete takes a lot of time you could spend whittling down the rest of the tasks on your ever-growing list.

### Solution

Create a rule to send a message each time a task from your boss is complete. You can create a generic message that will let him know you're done, allowing you to just check the task box instead of typing out a reply. Following are the conditions for that rule. (See Figure 2.)

#### When Event is Completed Item

**Act on items where** Item Type is Task **and** From contains [your boss' name]

**Then actions are** mail new item to: [your boss' name]

If you also plan to move these messages to a project-specific folder after they are completed, make sure your rules are organized correctly. The rule that sends the message should be first in your hierarchy, followed by the

Figure 1: You can create a rule to file completed tasks to a specific project folder.

**Edit Rule**

Rule name:

When event is

And items are:  Received  Sent  Posted  Draft

If conditions are (optional)

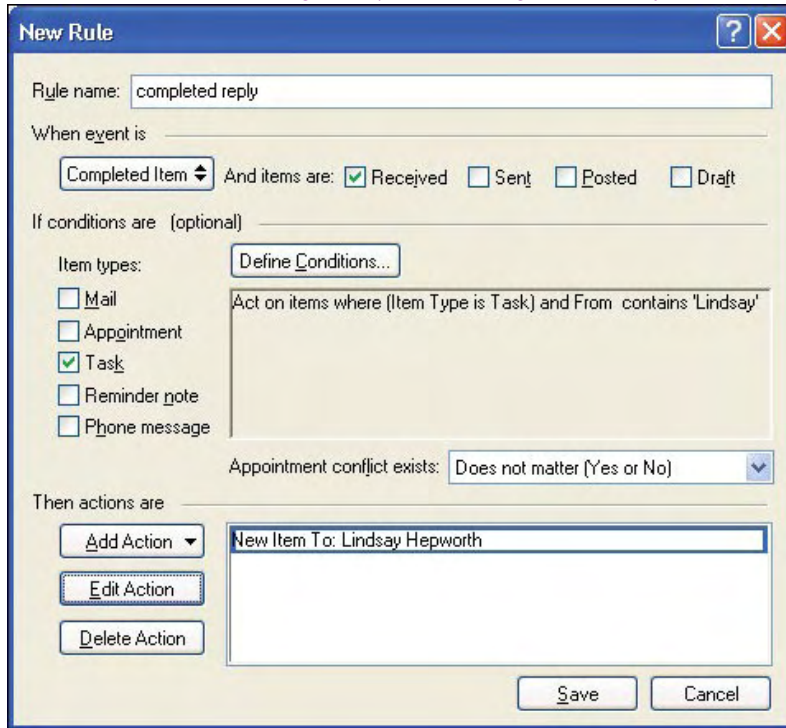
Item types:  Mail  Appointment  Task  Reminder note  Phone message

Act on items where Subject contains 'expense'

Appointment conflict exists:

Then actions are

**Figure 2:** You can easily create a rule that automatically replies to someone who has assigned you a task. In addition, each time you complete a task that was sent to you in GroupWise, the rule will send an automated message to the person who assigned the task to you.



move to folder rule because the rules are run in the order they are listed in your Rules list.

### ➤ Monitor Your Workload

#### Challenge

You're feeling a little bogged down by how much you need to do each day. Your task list continues to grow and you feel as if every task is turning red before you can even get to it. You need a little boost to show you that you actually are completing some tasks on time and others even early. In fact, you'd just like to monitor your overall work habits and make sure you're getting the tasks done that have the highest priority.

#### Solution

Create rules that automatically file your tasks according to when they are marked complete. These rules get a little tricky, but they're based on a simple filing rule with a few more simple conditions to define.

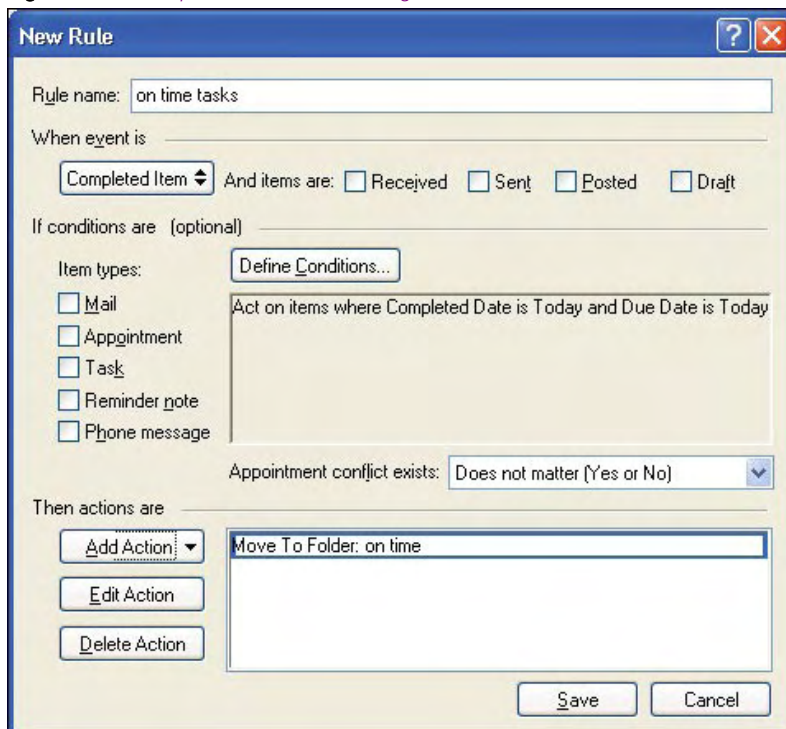
#### Task Completed On Time (See Figure 3.)

**When Event is** Completed Item

**Act on items where** completed date is today and due date is today.

**Then actions are** move to folder [Select the specific folder you created to monitor your on-time tasks]

**Figure 3:** Task completed on time rule dialog



#### Task Completed Late (See Figure 4.)

**When Event is** Completed Item

**Act on items where** completed date is today and due date is less than today.

**Then actions are** move to folder [Select the specific folder you created to monitor your on-time tasks.]

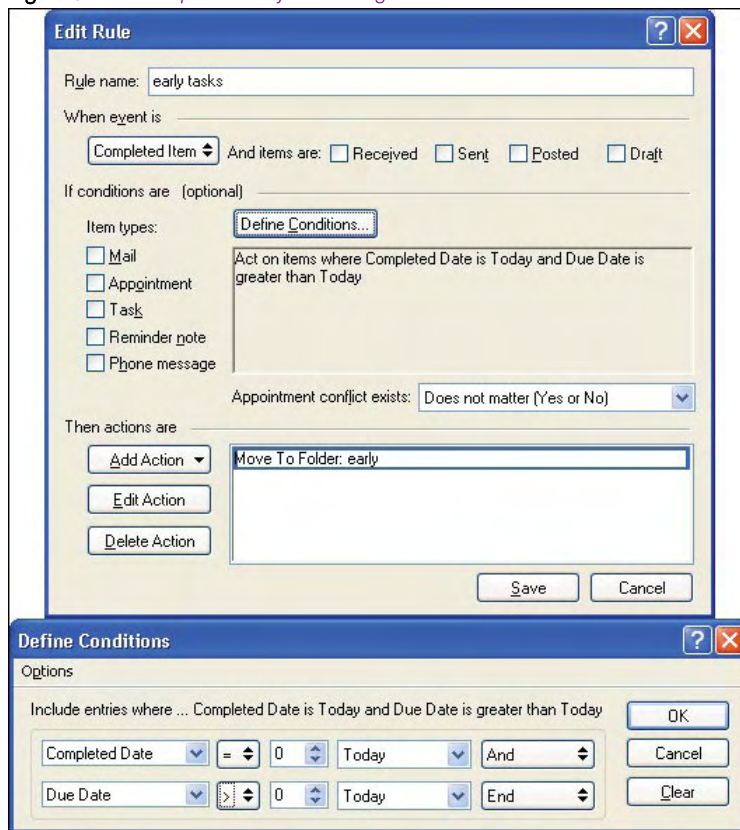
#### Task Completed Early (See Figure 5.)

**When Event is** Completed Item

**Act on items where** completed date is today and due date is greater than today.

**Then actions are** move to folder [Select the specific folder you created to monitor your on-time tasks]

Figure 5: *Task completed early rule dialog.*



2. Don't forget to Stop Rule Processing. As your list of rules grows longer and longer, chances are more than one rule will apply to any one item. To make sure your rules act the way you've programmed them, you may need to add the Stop Rule Processing action. When GroupWise executes your list of rules, it will stop processing the rules any time it comes to this command.
3. Remember that rules run in a hierarchy. This reminder goes along with the Stop Rule Processing reminder. As your list of rules grows, you'll need to examine how the rules run. Because rules run in order, you want to make sure your most detail-specific rules come first in the hierarchy.
4. The best way to include or exclude messages outside your GroupWise realm is to use the parameter *View Name contains Internet*. Although many rule creators try to create a parameter where the from address contains an "@," this is not the best way to make sure a rule only acts on internal addresses. Instead, the View Name parameter more definitely defines when a message is from an Internet source. **N**

You can also choose to organize your tasks according to the percentage completed for each task. The "% Complete" field under the Define Conditions button can help you create rules based on that parameter, which may also help you monitor your workload.

**> Rule reminders**

Rules have always been one of the most powerful parts of GroupWise—as long as users can learn to execute them correctly. In GroupWise 8, rules have gained even more power, but the way the rules run is basically the same. To avoid beginning pitfalls in creating and executing rules, here are a few things to remember as you create rules to govern your collaborating life.

1. To run a rule manually, you must first select the items upon which you want the rule to act. This means that if you plan to use a rule to automatically file items in your mailbox, you must select

Figure 4: *Task completed early rule dialog*

