

TABLE OF CONTENTS

TABLE OF CONTENTS.....	1
RE-ACT OR ACT?.....	4
PART I – THE APPROACH.....	5
E-mail – The pulse of our times	5
Manage tasks and e-mails.....	5
The empty inbox gets reality!.....	7
Am I done with the e-mail after reading it?.....	8
<i>Filing</i>	8
<i>Curtail the e-mail flood</i>	8
You are not done with the e-mail after reading it.	8
Can I deal with the e-mail in a few minutes?.....	9
<i>Delegate</i>	9
<i>Calendar entry</i>	9
<i>Avoid e-mail Ping-Pong!</i>	9
I need to deal with the e-mail later.....	9
Is there a fixed deadline for dealing with this?.....	10
There is no fixed deadline for dealing with this.....	10
Should I deal with the task quickly?.....	11
I cannot decide now.....	13
The outcome: a system of electronic lists.....	13
How to keep on track.....	14
D: See daily, what has been lined up for today.....	15
W: See weekly, what has been lined up next.....	16
T: Block time.....	16
PART II – EDIT E-MAILS AND CREATE TO-DOS.....	17
Start the ToDo Manager	17
Call up the ToDo Manager through the file menu.....	17
The start window.....	18
Set a bookmark for ToDo Manager.....	19
Create ToDo Manager as your home page.....	19
Close mail.....	20
Remove from inbox.....	20
File.....	21
<i>File e-mail with assignment to an address</i>	22
Delete.....	22
Process mail.....	23
Add to calendar.....	23
Delegate.....	25
Schedule mail.....	26
Carry out later.....	26
<i>Fixed day</i>	27
<i>Indefinite dates: Topical, soon, sometime</i>	28

<i>Reminders</i>	29
Create to-do.....	31
Create to-dos without e-mail.....	32
PART III – MAINTAIN AND COORDINATE TO-DOS.....	33
Buttons.....	33
New ToDo.....	33
Edit.....	33
<i>Example: Edit categories</i>	33
Priorities.....	36
Complete	37
Discard.....	37
Activate.....	37
Tabs	38
All, Fixed Day, Reminder	38
Topical, Soon, Sometime, Completed	38
Day, Week, Month.....	38
Edit lists.....	39
Sort lists.....	39
Open and close a list.....	39
Printing.....	40
<i>Print tasks</i>	40
<i>Print calendars</i>	41
PART IV – MONITOR TO-DOS IN VIEWS.....	42
The Mail tab.....	42
Calendar view in the ToDo Manager window.....	43
<i>Monitor inbox and calendar</i>	43
Appointments view in ToDo Manager window	44
<i>Monitor follow-ups and calendar</i>	44
Tasks view in the ToDo Manager window	45
<i>Monitor tasks without deadlines</i>	45
Filter view in the ToDo Manager window.....	45
<i>Example</i>	45
<i>Procedure</i>	46
Select between single and cockpit view.....	47
Appointments tab.....	48
Available menus.....	48
ToDo tab.....	49
PART V – TIPS AND TRICKS.....	50
Now more than ever - All about the inbox?.....	50
Paper mail? In the e-mail inbox!.....	50
Too many e-mails? Clear them!.....	50
Reduce the e-mail flood.....	50
APPENDIX.....	51
Definition ToDo.....	51

RE-ACT OR ACT?

Let's not kid ourselves. A major part of our daily office work is controlled by incoming e-mails. Mastering the e-mail overload is the biggest challenge of our times. Numerous studies show that employees spend about 20 percent of their working hours in processing e-mails.

A change is certainly necessary, if we don't want to become slaves to our e-mail inbox. Every day we are required to respond quickly to incoming requests, and there is hardly any time to manage daily tasks actively.

This booklet explains how you will become an active manager of your e-mail and task overload. A simple method will help you in creating a perfect system for your daily ToDo Management and reorganizing your routine. Nothing will get lost anymore, you will feel relieved, get work done in a relaxed state of mind and have more time for the important challenges of your job.

- Do you wish **to get a new approach** for managing your e-mail and task overload? Then read Part I – The Approach page 5.
- You wish to start **using the Weilgut ToDo Manager immediately**? Then begin with Part II – Edit e-mails and create to-dos on page 17.

However, you will see the value of processing e-mails at once and you'll stick to it like glue!

PART I – THE APPROACH

E-mail – The pulse of our times

The computer age has given us many new communication tools, promising to simplify our work. E-mail has become an important medium of communication, connecting us with the outside world and providing us information even if we are away from the computer. Everything we do - whether business or personal - is controlled to a large extent by our incoming e-mails.

Unfortunately, this creates new problems. Those bombarded with e-mails tend to be reactive rather than active in their task management. Moreover, e-mails are basically not suitable for storage on server drives. Besides, it may also contain important information, which cannot be easily transferred to other systems: Who has sent me what and when, when have I replied to it and who was on the mailing list?

Thus, the e-mail inbox has suddenly become an important storage system! We are afraid of deleting e-mails and want to keep it in case we need it later. The consequence: E-mails are filed in the inbox for a long time, managing various views, filters and search mechanisms rather badly.

Manage tasks and e-mails

Think about it: When was the last time you had an empty inbox? Numerous e-mails from external and internal colleagues (some of which you are only copied on) or newsletters land in your inbox. It is a real challenge to read all these e-mails. Another challenge is to process and file those e-mails really needing your attention.

What are you thinking when you read an e-mail?

- Read quickly and get rid of it.
- I must do something about it.
- Just don't forget!
- Could be interesting for the colleagues in the engineering department.
- Just what we need in project 'Titanic II'!
- That's a good idea, maybe useful for us later.
- It is not interesting now, perhaps later.

From this small list you immediately know that the incoming e-mails are an important source of information for your daily actions. Which means:

Every individual e-mail requires a number of decisions for determining what needs to be done next.

You basically come to a decision after you have read the e-mail. Observe: What do you do next? You can simply read many e-mails to keep yourself updated. You delete a majority of them from the inbox. Other e-mails require to complete an action: reply, derive the next step, create a task for yourself or delegate it to somebody, call a meeting or set a reminder.

Let's look at the problem:

E-mails requiring action remain in the inbox till the action is completed.

How do you make the significance of an e-mail visible in your inbox? How would you know that the e-mail is linked with a certain appointment or that you have already called a meeting? This confusing overload of e-mails and tasks is burdening!

To date the problem lay in transferring an e-mail in your personal Lotus Notes task management. Copy & paste is time-consuming and unsatisfactory because the original mail with the important information of date, sender or mailing list is lost. Reminder and task functions of standard e-mail tools are helpful but offer cumbersome procedures.

The outcome is a full inbox, upon which you are repeatedly working. You have to recheck every e-mail: What specific action do I need to take here? By what date? The more e-mails you're collecting, the more difficult it will be to differentiate between the important and unimportant ones. Or to find those e-mails requiring action. You spend a lot of time in opening, reviewing, and closing the same e-mail message again and again. The risk is high that you may overlook important matters due to the variety of heterogeneous information or that they may fall into oblivion because of the new e-mails.

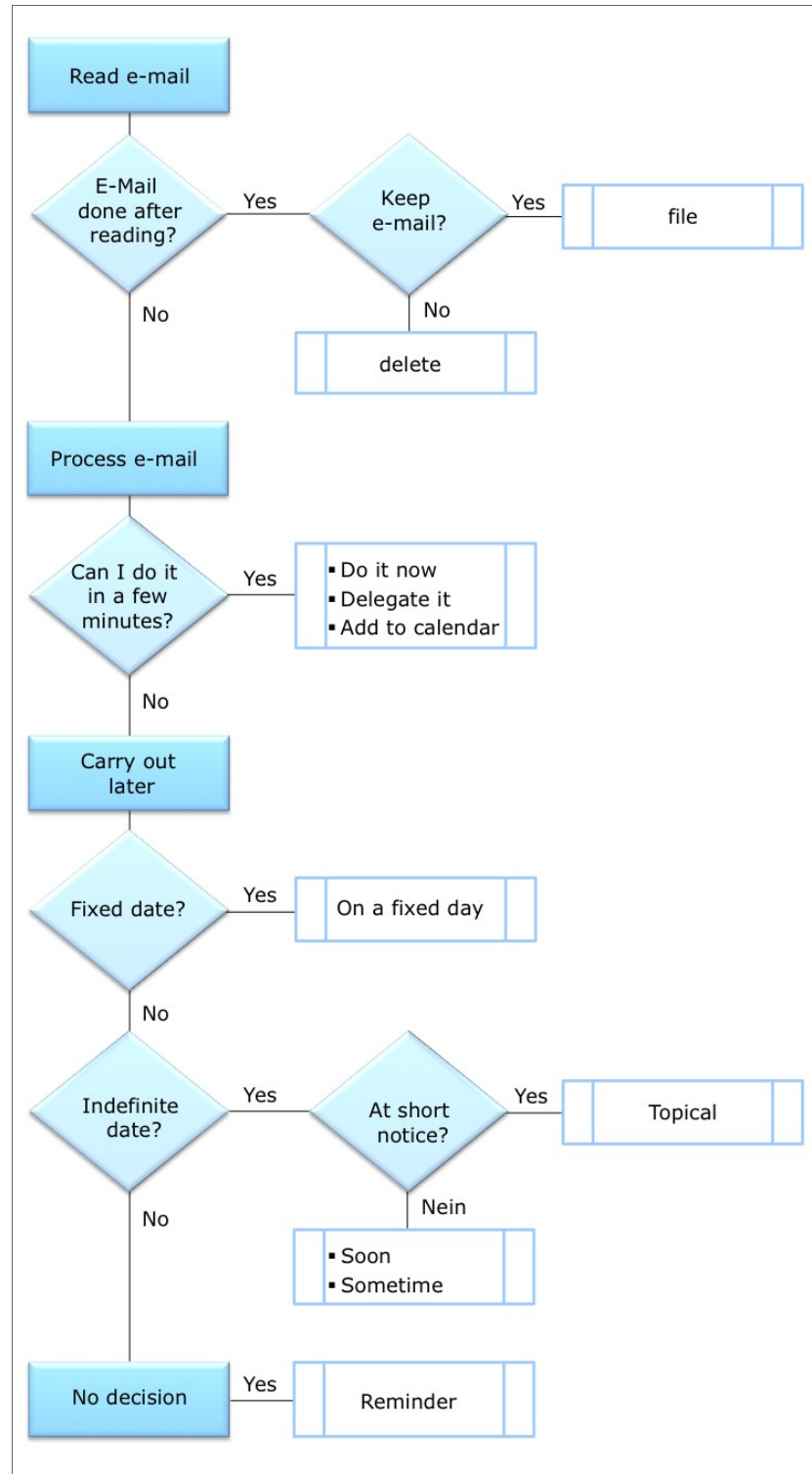
If you wish to work efficiently just use your inbox more efficiently.

Would you use your personal mailbox at home as storage for important documents? No, you empty it, you go through the paper mail and store them in suitable ring binder folders, if required. This is exactly the approach of the "Weilgut ToDo Management", which will be explained in the subsequent chapters. The aim: an empty inbox!

The empty inbox gets reality!

The Weilgut ToDo Manager delivers a valuable model for processing e-mails, helping you to decide what action needs to be completed and thus to get an empty inbox:

ILLUSTRATION:
Illustrative decision-making process



It's quite easy. Just make a decision as soon as you have read an e-mail:

Am I done with the e-mail after reading it?

If you are done with the e-mail after reading it, in the next step then ask yourself: Would the information be of use to me or somebody else in the future?

If no, then **delete** the e-mail from the inbox. If yes, file the e-mail by moving it to a **folder**. Decide, whether you wish to file the e-mail in a **personal folder** or a **common folder**.

NOTE:

Filing available when the add-ons Weilgut Organizer and Weilgut DMS are installed

WEILGUT DMS:

If you use a document management system in the background, it is used as a central repository and enables you to assign e-mails and tasks to specific processes, projects and folders.

Filing

As a user of Lotus Notes, it is important that you **set up a filing system in the Lotus Domino database** and avoid storing documents on your hard disk or the server drives.

Notes power user or Notes spare user - The Weilgut ToDo Manager supports you perfectly. You can file any e-mail, note, correspondence, meeting and much more. Link it to processes, projects or even addresses and call it up anytime in Lotus Notes. This is your beginning to genuine knowledge management!

File folders

Set up the folder structure of the database similar to the folder structure on the server drive, provided you cannot (yet) do away with it.

Project folders

If an e-mail is related to a specific project, you can keep it at an appropriate location in your project file. As per your project structure plan, you can structure e-mails according to sub-tasks and work packages or even activities and milestones.

Sales

If an e-mail relates to an event or a sales activity, file it at an appropriate location in the storage structure of the sales organization, for example an exhibition.

Curtail the e-mail flood

In any case avoid transferring mails to a large mailing list, so that you do not further increase the flood of e-mails at your company. File the e-mail in a central database and send just a link to the storage location, instead of the entire document. In order that you do not tempt the recipient to file the document once again, keep it in the personal mail-database or retain it in the inbox.

You are not done with the e-mail after reading it.

An e-mail often brings information, resulting into other ideas or actions. Ask yourself: What is the next step? How long would you or somebody else need to execute this step? Continue like this:

Can I deal with the e-mail in a few minutes?

Where does this question lead? It's quite simple: What's done, is done. Every unprocessed e-mail is a burden, as it literally "breathes down your neck". If you can process the e-mail immediately, kindly do so. That way, you don't stack it as an additional burden in your inbox or your head.

NOTE:

Available only in combination with the addons Weilgut Organizer and Weilgut DMS

Delegate

If you cannot process the e-mail yourself, delegate it. Instead of forwarding the message, convert it into an activity, which can be assigned to a responsible person with a completion deadline. The task recipient calls up the activity in the system and maintains the execution status, which you can follow up on anytime.

Calendar entry

Another option is to call a meeting concerning the topic of the e-mail. Instead of changing to your Lotus Notes calendar, call up the "create calendar entry" function directly in ToDo Manager and send invitations for the meeting. The original e-mail can be found automatically in the appendix of the calendar entry and can be revised by you in the form, in which you wish to communicate further on the topic. The participants of the meeting can accept or reject your Lotus Notes invitation in order to transfer the appointment into their calendars.

MORE ON THE TOPIC:

→ Case study "Ms. Peabody should obtain alternative offers for the new company car"
Page 12

→ Case study "Discuss 2010 budget figures in the next core team meeting"
Page 11

Avoid e-mail Ping-Pong!

Every reply to an e-mail means a new e-mail in the inbox of the sender and the persons who have been copied. First check whether the topic is on the agenda of a meeting or a telephone call. Create a to-do in a list, in which you collect all the topics for this meeting.

I need to deal with the e-mail later.

Now the ToDo Manager will become very interesting for you. Assume that

- a much awaited decision has reached you via e-mail.
- You receive important information, which necessitates a well-thought-out action,
- You are aware of the status of several projects in your department and wish to view the reports in peace.

Such e-mails affect your business success. Earlier you would have printed the information and stacked it on your table or had it marked for follow-up so that it does not perish among the many irrelevant e-mails.

Even if your inbox has become cleaner as you consistently file and delete messages - can you be sure that you are not forgetting something? The many unexecuted e-mails will keep you busy till they are converted into tasks, in good structured overview and provided with deadlines.

You can easily accomplish this by handling the e-mails the same way as your mail. You assign the incoming information to specific projects, current processes, planned events or miscellaneous. Each bit has a different meaning for you or must be handled with a specific priority. Consider next:

Is there a fixed deadline for dealing with this?

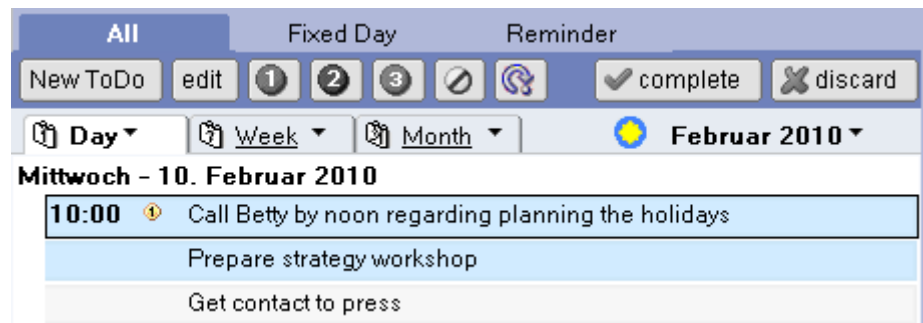
Create a follow-up for to-dos with a fixed deadline.

Case study "Call Betty by noon for planning the holidays (decision to be taken today!)"

You must call your wife on time and hence create a follow-up for a specific time. After the telephone call, set the follow-up at "completed".

ILLUSTRATION:

Weilgut ToDo Manager: Follow-up with time in the follow-up view

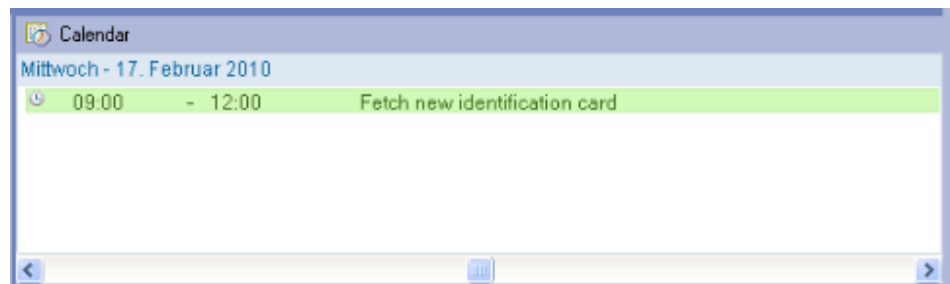


Case study "Fetch new identification card on Wednesday between 9 and 12"

You know that you can pick up your identification card only on Wednesday between the hours of 9 and 12. Plan this task in your Lotus Notes calendar and take into consideration the travel time to the administrative office:

ILLUSTRATION:

Weilgut ToDo Manager: Appointment reminder in the calendar view



With that the task disappears from the to-do list and you have blocked out a time slot, so that no other appointments overlap.

There is no fixed deadline for dealing with this.

If you have not specified a fixed deadline for processing this e-mail, next, ask yourself:

Should I deal with the task quickly?

Arrange your to-do lists based on urgency. It would be best to create a list for tasks, which are **topical**, i.e., should be processed urgently. Collect the less urgent tasks in a **soon** or **sometime** list.

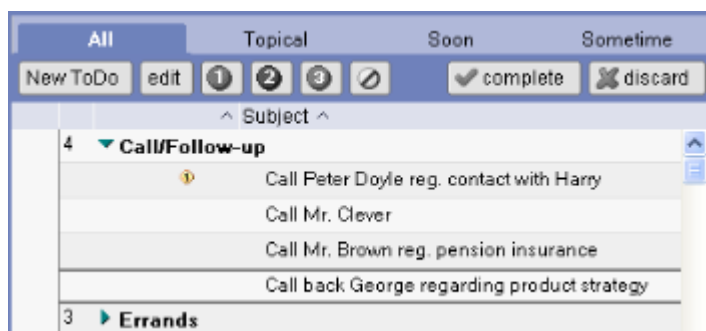
Another important criterion for sorting lists is categories, especially if you have a number of tasks to execute. By collecting individual tasks in a categorized list, you accelerate their processing immensely. From the following examples you can see how it increases your and your staff's efficiency!

Case study "Call back George regarding product strategy"

You are certainly required to call many people daily - superiors, business partners, colleagues. Rather than memorizing the list of people to be called, create a **telephone call list** in the ToDo Manager.

ILLUSTRATION:

All tasks with the telephone call category automatically appear in your telephone call to-do list. View: Tasks.



Assume that you have received an e-mail from George, a colleague, in which he requests you to call him back regarding product strategy. In the ToDo Manager you simply convert this e-mail into a **topical task** with the **category telephone call**. It goes into your telephone call list, whose sequence you can sort by prioritizing items from 1 to 3.

If you have time to make phone calls later on, simply call the people in the list one after the other. For every finished phone call, set the related task in your list as completed. If you cannot reach all the people, go to another to-do list and call up the telephone call list on the following day.

Case study "Discuss 2010 budget figures in the next core team meeting"

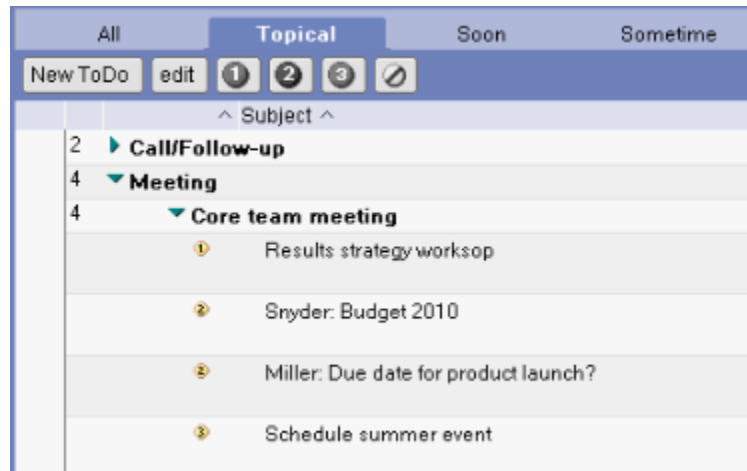
The next core team meeting is on the coming Thursday. You have received the document with the 2010 budget figures from your colleague Snyder via mail. Moreover, you have already made notes regarding the topics you would be addressing in the meeting in addition to those mentioned in the agenda. This necessitates you to follow two systems: from your paper notes on the table and on your computer, in which you have saved additional information.

Compare that to the ToDo Manager, which enables you to work only on an electronic basis. Rather than noting down the task "discuss 2010 budget figures in the next core team meeting" create a **topical task category "core team meeting"** directly from the e-mail from your colleague Snyder, this could be: "Snyder: Budget 2010". If you find additional documents in the database, you can simply refer to them via link and call these documents up in the meeting.

Every additional note for the next core team meeting can be created as a **new to-do** in ToDo Manager, ditto **topical tasks category core team meeting**.

ILLUSTRATION:

List with points for discussion for the next core team meeting

**E-MAIL PING-PONG?**

By managing the to-do lists you avoid forwarding of e-mails and thus reduce the e-mail traffic for the entire company.

The outcome is an electronic to-do list with collective points for discussion. Print these points out shortly before your meeting or call them up in the meeting using your notebook. All discussed points are set at completed, while the incomplete ones remain in the list till they are really discussed in the next core team meeting.

Case study "Ms. Peabody should obtain alternative offers for the new company car"

Assume that Ms. Peabody is your secretary, with whom you have regular coordination meetings. You need alternative offers for your new company car and create a new **task "soon"** as getting this done is not urgent for you.

Now it is important that you assign the **category "Meeting with Ms. Peabody"**. Once you have created the task, you can call it up time and again. Over the course of time, create additional points for discussion as to-dos and print them out as a list of open points right before the meeting with Ms. Peabody.

Example: List of errands

Assume that your table lamp conks out and the spare bulbs are out of stock. You wish to purchase them sometime when you are in a hardware store. For this create a **sometime task** so that you can call this list up when you go to the hardware store.

It is important that you assign **category errands** for such types of tasks. For example, when you need an extension cable with a multi-outlet power strip, create a **sometime task** with the same category. You now have a complete list of errands and can print it out if required - shortly before you visit the hardware store.

I cannot decide now.

Assume that you receive an important e-mail but are not free to attend to it. Presently, you cannot decide the next step for this topic and you wish to see the e-mail again later. Now you run the risk that your inbox swells because the e-mail flood accumulates at the wrong moment; tsunami risk prevails! In this case, rather create a follow-up with a reminder date by simply clicking on "process later".

Example: As a weekend workaholic, you can select the date of the coming Saturday, when you wish to attend to the topic peacefully from your home office. As soon as you open your notebook on Saturday, the ToDo Manager reminds you about the task.

The outcome: a system of electronic lists

When you have packed all your tasks - important or unimportant, personal or business - from your head or notes away in an electronic system, then you can get an overview based on various to-do lists with sorting and filter functions anytime. You can thus be sure that you have forgotten nothing.

The system of lists will help you in making all needed information available in decisive times. Or you can also be sure of things when you are in the hardware store and thinking "what else do I need?".

The most important prerequisite is that you actually pack everything into a system of to-do lists - whether business or personal to-dos - and then only call them up at decisive times. The effect is that you need not keep the list in your mind constantly and can concentrate on important work matters.

How to keep on track

Finally, any e-mail or task is transferred to your task management. Thus you just need to remember to review your lists in a timely fashion.

The ToDo Manager will help you: In various views, you can monitor, process, sort and filter all to-do lists as per specific criteria.

- Tasks view: All tasks topical, soon, sometime
- Appointments view: All follow-ups with fixed appointment and reminder
- Calendar view: All appointments from your Lotus Notes calendar

When reviewing the to-dos, you can decide what you wish to execute in the time currently available:

- Should the task be processed today?
- Do I have all the information for dealing with the task? What is the next step?
- Do I need somebody else's services for processing the task? How much lead time would the other person need for rendering the service? Would that be sufficient for me to adhere to the deadline I've set?

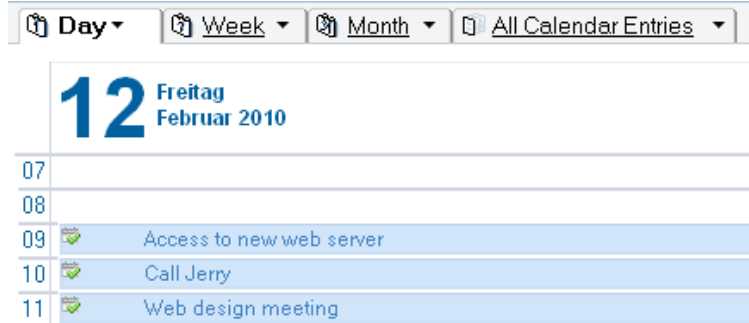
Now you you just have to go through your to-do lists continuously and systematically. We recommend the **DWT model**, worthwhile even for managers and project leaders with tight appointment schedules and full inboxes:

D: See daily, what has been lined up for today

As soon as you have some free time, go through the follow-ups in the appointments view and the topical lists in the tasks view. This procedure has proved to be effective:

ILLUSTRATION:

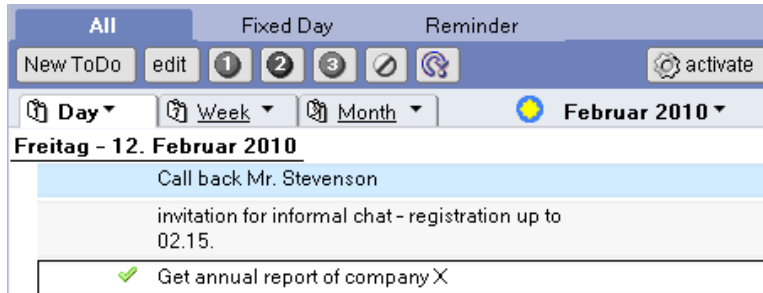
Monitor your appointment schedule in the calendar view.



- 1 Your first view: the appointment schedule. Which appointments have been lined for today?
- 2 Then check your e-mails. Are there any urgent requests?

ILLUSTRATION:

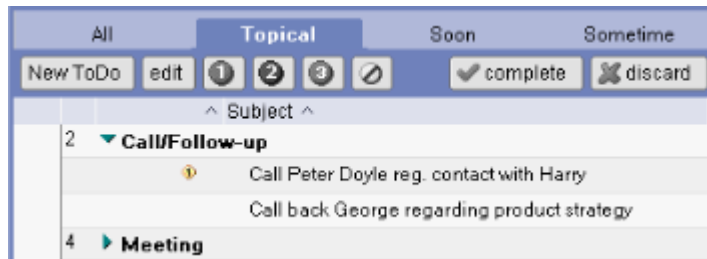
In the appointments view, you monitor your follow-ups, fixed day and reminders in one daily, weekly and monthly view.



- 3 Subsequently check your to-dos with fixed appointments and your reminders. What must be done today? Execute it immediately.

ILLUSTRATION:

In the tasks view, you find your topical list sorted according to categories.



- 4 Then go to the "topical" to-do lists and deal with the tasks as possible. Use your intuition to decide the task to be processed first.

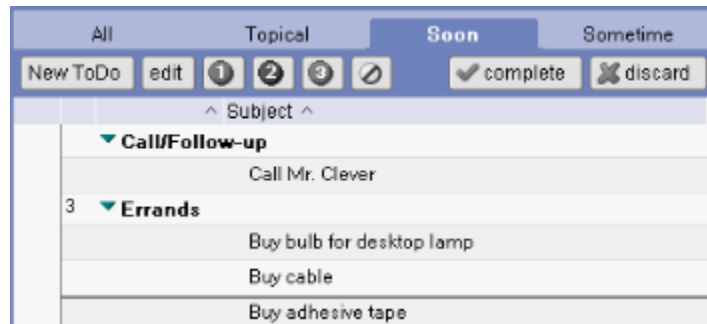
When you proceed in this manner daily, no tasks will slip past. If appointments are postponed, just edit the to-do list anytime for changing the appointments or moving the task to another list, for example from the topical list to the soon list.

W: See w weekly, what has been lined up next

The **soon list** can be reviewed once weekly to check whether its tasks still belong to this list.

ILLUSTRATION:

The soon view helps you monitoring the tasks to be completed at short notice.



Simply transfer some tasks from the **soon list** to the **topical list**, so that you have them ready for your daily viewing.

Go through your sometime list only once a month or call it up when required. Example: You go to the hardware store and call up the errands list under **sometime**.

T: Block time

You have a tight appointment schedule? Then try to block sufficient time early enough in your appointment schedule per day and per week, in which to process your e-mails and execute to-dos. This is important: Do not block a specific time slot for a task but decide the task you wish to execute in that time slot. Proceed as **D: See daily, what has been lined up for today** and **W: See weekly, what has been lined up next**

Based on the to-do lists you can estimate, how much time you can allot for dealing with the tasks. Attempt to stay on task and not let the "new e-mail" signal disturb you. In the future you could plan to perhaps edit your e-mail every three hours or at a specific time? Just try!

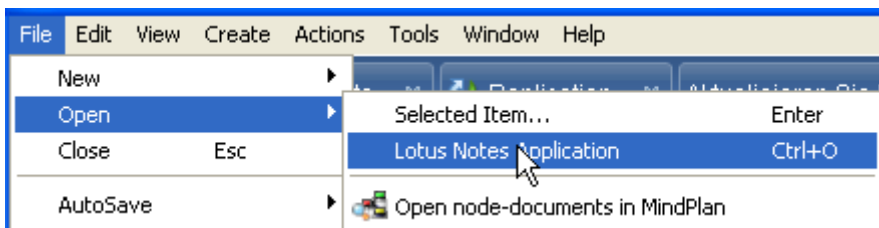
PART II – EDIT E-MAILS AND CREATE TO-DOS

Start the ToDo Manager

When the ToDo Manager is installed, open your Lotus Notes application as usual. You have various options in order to open the ToDo Manager for the first time:

Call up the ToDo Manager through the file menu

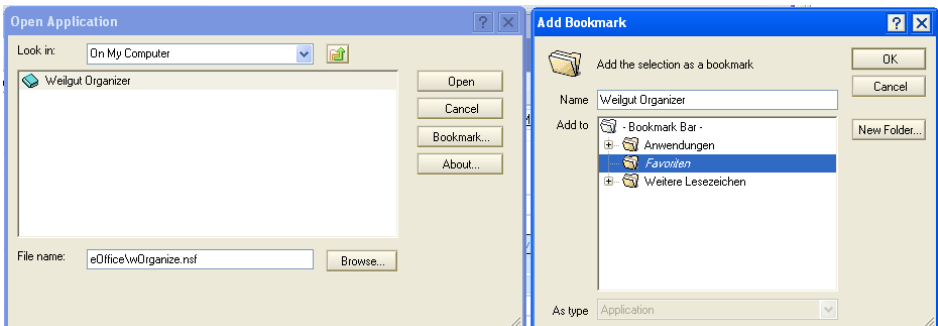
- 1 Open your Lotus Notes application.



ALTERNATIVELY:

Click on the home page tab and open Weilgut ToDo Manager by double-clicking the appropriate tile.

- 2 Open the topmost menu bar **file** → **open** → **Lotus Notes application** or press the key combination **Ctrl+O** on your keyboard.
- 3 Select the database **Weilgut Organizer** from the **eOffice folder**.



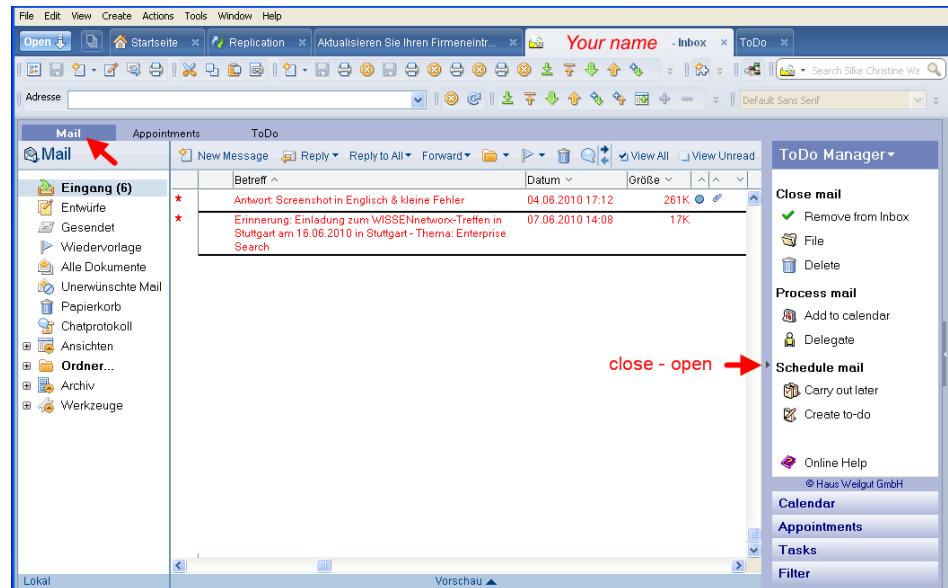
- 4 Click to the right on the button **bookmark** for placing the ToDo Manager in the left bookmark bar under **Favorites**.
- 5 Confirm with **OK**. The window closes.
- 6 Mark in the open dialog **database Weilgut Organizer** and confirm with **open**.

The start window

NOTE:

ToDo Manager automatically imports e-mails from your mail database and offers the normal edit menu.

Opening the ToDo Manager for the first time, the **Mail view** appears by default as start window.



There are three tabs on the left - Mail, Appointments, ToDos. Click on the **Mail tab**, if it is not active in your view.

To the right of your **inbox** there is a **ToDo Manager window** with the view for **editing mails**.

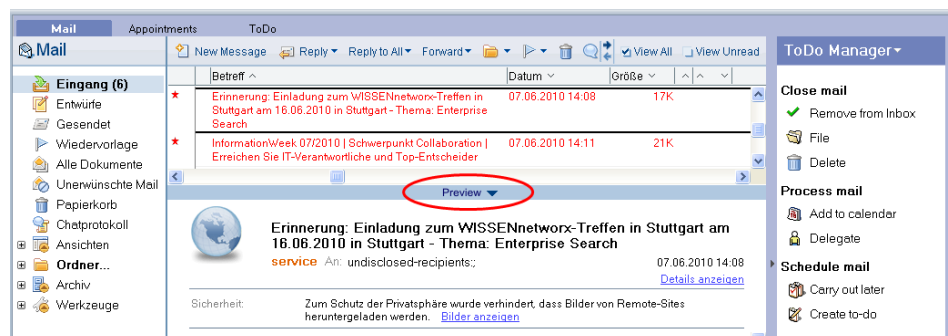
Open and close the ToDo Manager, wherein you click on the small arrow on the left bar.



Close the ToDo Manager, by closing the top tab **your name – inbox**. Open the ToDo Manager by clicking the symbol on the left bookmark bar, similar to the opening of your e-mail view in Lotus Notes.

ILLUSTRATION:

Open a preview window and edit e-mail in the ToDo Manager window on the right.



For optimum working with the ToDo Manager, open the preview window by clicking the **preview** arrow on the lower bar. You can thus read **e-mails** and manage the ToDo Manager with the menus in the right **window**.

YOUR BENEFIT:

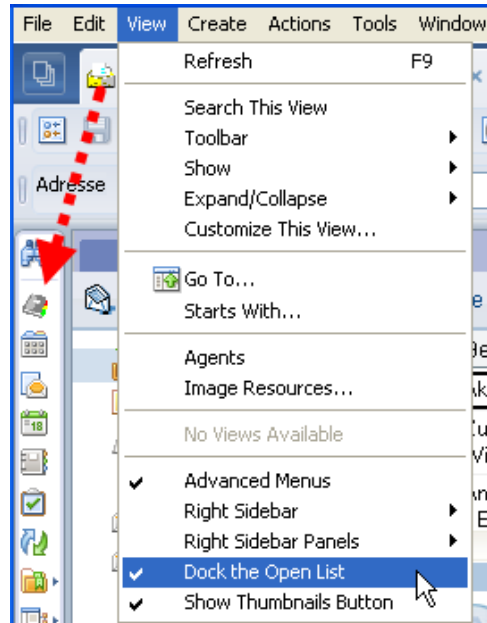
Everything required for editing e-mails and personal time management in a unique interface, fully integrated in Lotus Notes.

Set a bookmark for ToDo Manager

If you have yet not created a bookmark, as described under **Call up the ToDo Manager through the file menu** page 17, you can do it now with the opened ToDo Manager:

ILLUSTRATION:

Open the ToDo Manager and pull the tab to the left bookmark bar with the mouse.

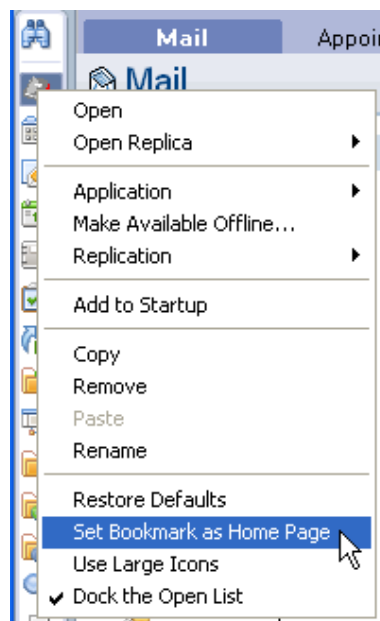


1 Select **view** → **open list dock**. The symbol bar on the left appears.

2 Or pull the opened top tab with drag & drop into the left bar, like you usually do with other Notes applications.

Now a **symbol** appears, with which you can quickly open Weilgut ToDo Manager in the future.

Create ToDo Manager as your home page



Click with the right mouse key on the bookmark ToDo Manager in the left bookmark bar and select **define bookmark as home page**.

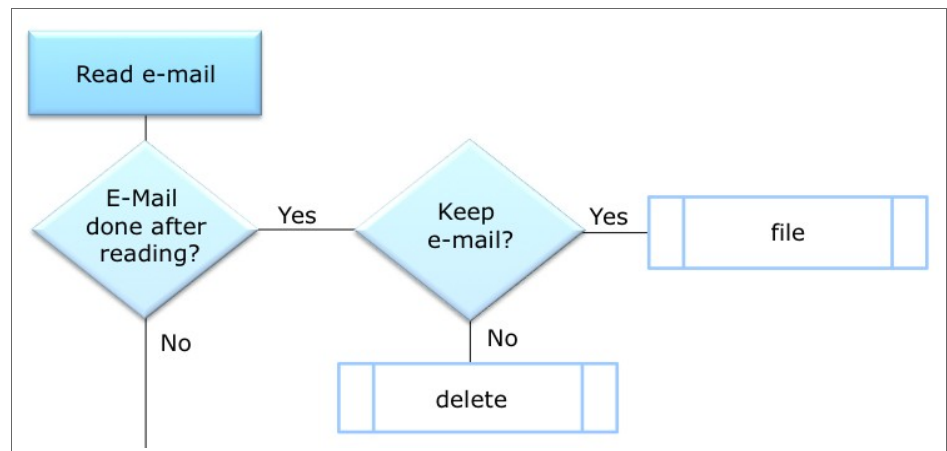
Close mail

ILLUSTRATION:

Decision-making phase 1, compare Part I – The Approach

→ Am I done with the e-mail after reading it?
Page 8

→ You are not done with the e-mail after reading it.
Page 8



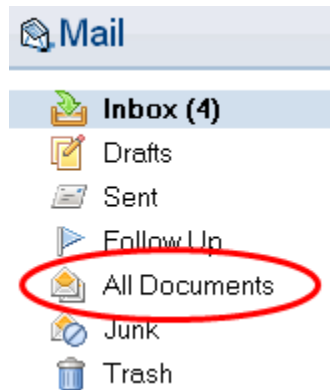
Ask yourself, if you are through with the e-mail after reading.

✓ Remove from Inbox

Remove from inbox

This function is perfect, if you wish to file e-mails from your inbox in the **all documents** folder.

- 1 Click on any e-mail that you wish to remove from your inbox.
- 2 Click on the **ToDo Manager window** under **close mail** on **remove from inbox**.



- 3 You can call up the e-mail anytime by clicking on the window menu under **Mail** on **All documents**.



NOTE:
Available only with the add-ons Weilgut Organizer and Weilgut DMS

ILLUSTRATION:
Example for a dialog box for mail storage. Menu items addresses, mailing folder and recently used only appear if the ToDo Manager is linked with Weilgut Office application.

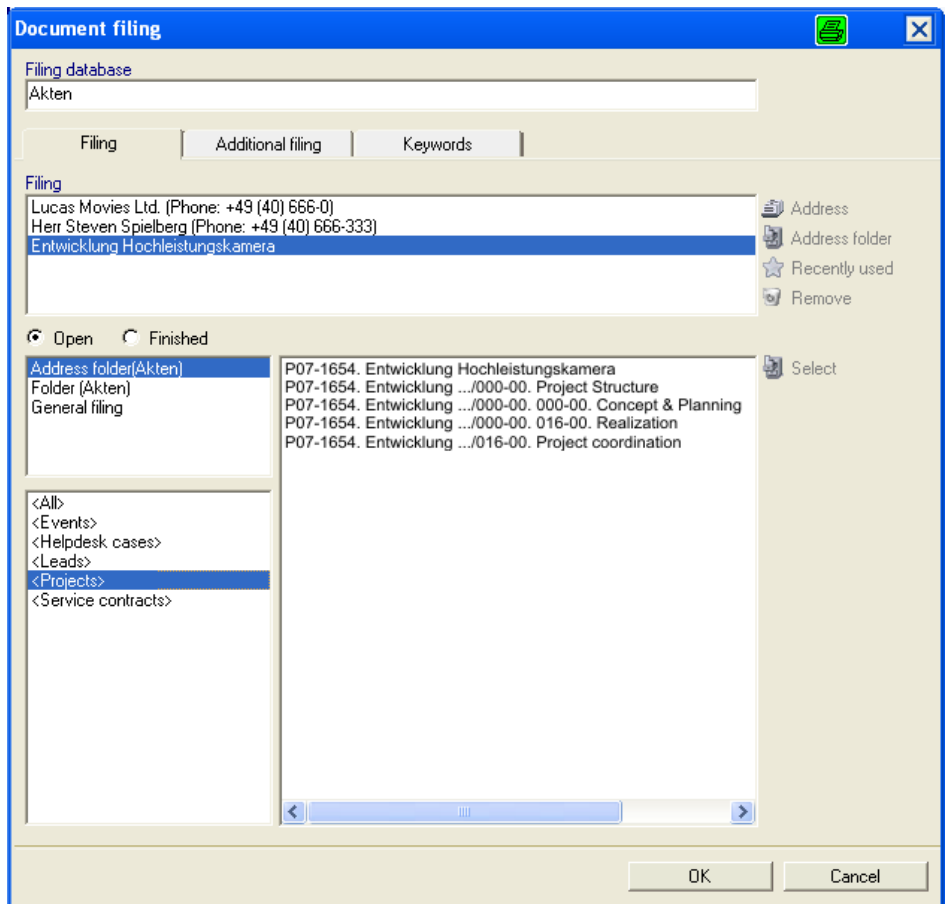
YOUR GAIN:
Common data management enables live knowledge management. Easy operation in ToDo Manager for storage of important e-mails ensures efficient work by all employees.

File

The addons **Weilgut Organizer and DMS** offer you a common Document Management System, in which you and your colleagues can file e-mails. This is particularly applicable for e-mails referring to projects, processes or addresses.

Assume that you have received an e-mail with reference to a project concerning postponement of an acceptance deadline. In the common project file exists a project coordination folder, in which you file such information to provide to your colleagues. Proceed as follows:

- 1 Mark an e-mail in your inbox.
- 2 Click on the right on **file** under **close mail**.

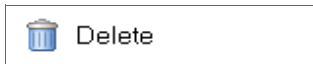


- 3 Select the desired database from the **Filing database** field.
- 4 Select the file location in the **Filing** tab: Select the menu item **address folder** under the file field and the desired **folder** beneath it, for example **<Projects>**. To its right, the filed projects are listed. Select for example the folder **... 016-00. Project coordination**.
- 5 Confirm with OK. The ToDo Manager stores a copy of the e-mail in the central database. You and your colleagues can call it up there anytime.

File e-mail with assignment to an address

In combination with the **Weilgut Organizer** and **Weilgut DMS** you have the option of linking your ToDo Management to the address database, provided that you have integration with Weilgut Office.

In the dialog box shown above you can file your e-mails with the menu items **address**, **mailing folder** and **recently used** in the company database, assigned to the contact data of the sender.



Delete

Click on delete to move an e-mail to the Lotus Notes trash. The e-mail is no longer displayed in your inbox.

- 1 Click on any e-mail in your inbox.
- 2 On the right, click on **delete** under **close mail**, if you wish to finally delete the e-mail from your personal mail database.

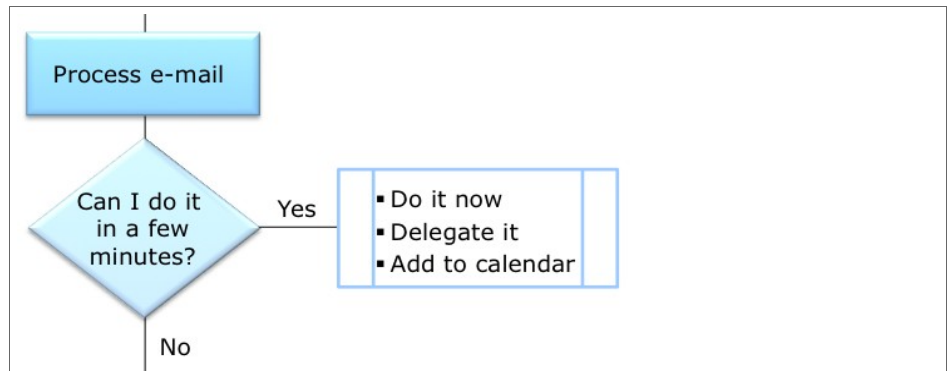
Use this function for e-mails considered "trash". You can also call it up once again, so long as you have not emptied your trash. This deletion process is dependent on your Lotus Notes system settings.

Process mail

ILLUSTRATION:

Decision-making phase 2, compare


→ Can I deal with the e-mail in a few minutes?
Page 9



If you are not done with the e-mail after having read it, ask yourself, if you can deal with it in few minutes. If yes, then you have the option of attending to your

- e-mail immediately,
- delegating the task,
- creating a calendar entry, for example if you wish to call a meeting with an expert on this topic.

The ToDo Manager supports you as follows:

 Add to calendar

Add to calendar

Assume that you must fetch your identification card on Wednesday between the hours of 9 and 12. Then create a calendar entry for this period so that no other entry overlaps. The function **add to calendar** helps you to convert an e-mail into a calendar entry, without shifting to your Lotus Notes calendar application.

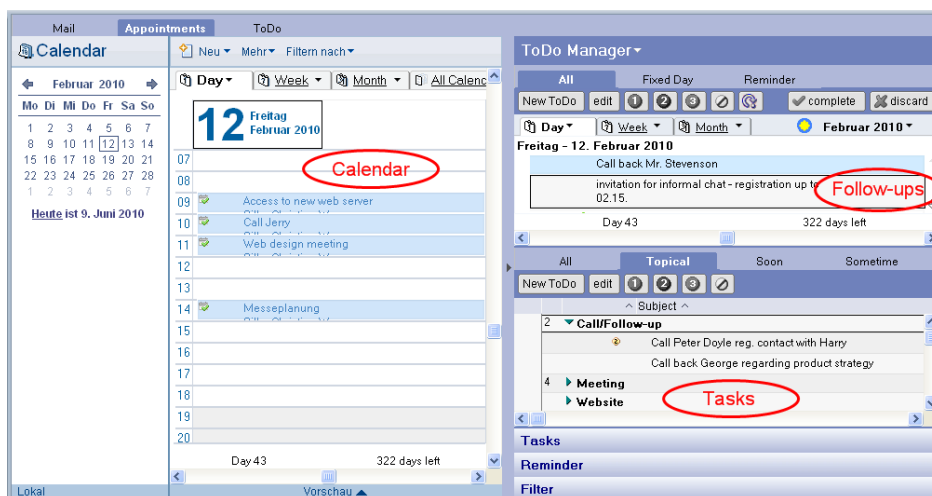
- 1 Mark the relevant e-mail.
- 2 Click on the **ToDo Manager window** under **process mail** on **add to calendar**.
- 3 Create a meeting date, similar to your Lotus Notes calendar. The original e-mail is in the lower field, so that it is immediately available for the meeting.
- 4 Close the calendar entry by clicking at the top on **save and send** invitations.

Your calendar entry is here:

Click on **ToDo Manager window** on the top **appointments tab** and to the right on **Tasks & reminder**. Here meeting dates, tasks and follow-ups are again available for you in one view.

ILLUSTRATION:

Monitor your calendar entries, follow-ups and tasks simultaneously in the calendar tab.



With our approach - unlike other self-management suggestions - you do not send scheduled tasks to the calendar - unless, you wish to block a specific time for the completion of the tasks or for the preparations for an important appointment.

The reason: If you organize all to-dos in a calendar, then you quickly lose the overview regarding time actually blocked out for meetings. Not completed tasks would need to be shifted to a new appointment.

You get a better overview, if you manage the tasks as described and compare the calendar entries with the to-do lists.

Find more information on this window under **Appointments tab** on page 48.

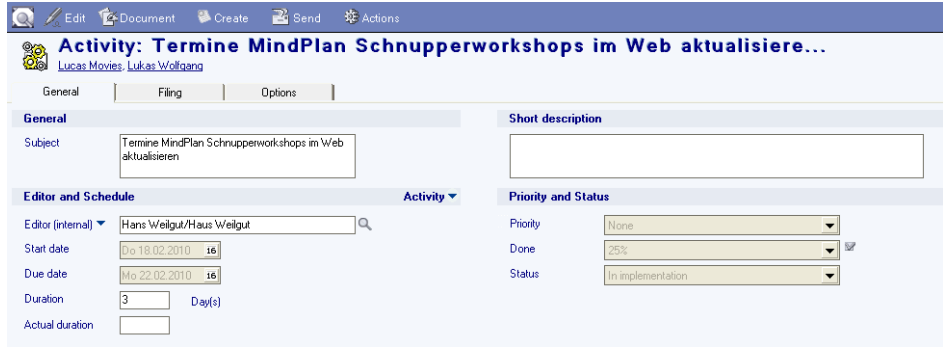
 Delegate
NOTE:

Available only with the add-ons Weilgut Organizer and Weilgut DMS

Delegate

Use this function to delegate e-mails to a colleague. Instead of forwarding the e-mail, you can now create a to-do in your ToDo Manager. The completion status of which can be checked anytime. How it works:

- 1 You are in the **mail overview**. Mark an e-mail in your inbox and click to the right on **delegate**.



The screenshot shows the 'Activity' form in Lotus Notes. The title bar reads 'Activity: Termine MindPlan Schnupperworkshops im Web aktualisiere...'. Below the title bar are tabs for 'General', 'Filing', and 'Options'. The 'General' tab is active and contains several fields:

- Subject:** Termine MindPlan Schnupperworkshops im Web aktualisieren
- Editor (internal):** Hans Weilgut/Haus Weilgut
- Start date:** Di 18.02.2010 16
- Due date:** Mo 22.02.2010 16
- Duration:** 3 Day(s)
- Actual duration:** (empty)
- Short description:** (empty text area)
- Priority and Status:**
 - Priority: None
 - Done: 25%
 - Status: In implementation

Hallo zusammen,

bitte die Termine von den MindPlan-Schnupperworkshops auf der Website aktualisieren.

Grüße

- 2 The e-mail is converted into a special Lotus Notes document. The upper input fields help you to define your to-dos:
 - In the field **topic**, if required, overwrite the text that has been automatically imported from the e-mail-subject heading.
 - In the field **responsible (internal)** enter the name of the task recipient or select one from the address database (click on the magnifying glass on the right).
 - Optionally, enter a date in the **begin** field, on which the task recipient should begin with the activity.
 - Optionally, enter a date in the **due on** field, on which the task should be completed.
 - The **duration** can be calculated by clicking the calculator.
 - In the field **actual duration** the recipient can enter how much time he has already spent on completing the task.
 - The **short description field** and the **text field** below can be used for additional explanations.
 - If required, set a **priority**.
- 3 Confirm with a click on the top button **save**.
- 4 The task recipient receives a message that a task was assigned to him, and he can maintain the completion status. Through synchronization he automatically receives the task in his ToDo Manager. With the help of the document management system in the background, the person delegating the task can follow-up on the completion status anytime.

Schedule mail

ILLUSTRATION:

Decision-making phase 3, compare

→ I need to deal with the e-mail later.

Page 9

→ Is there a fixed deadline for dealing with this?

Page 10

→ There is no fixed deadline for dealing with this.

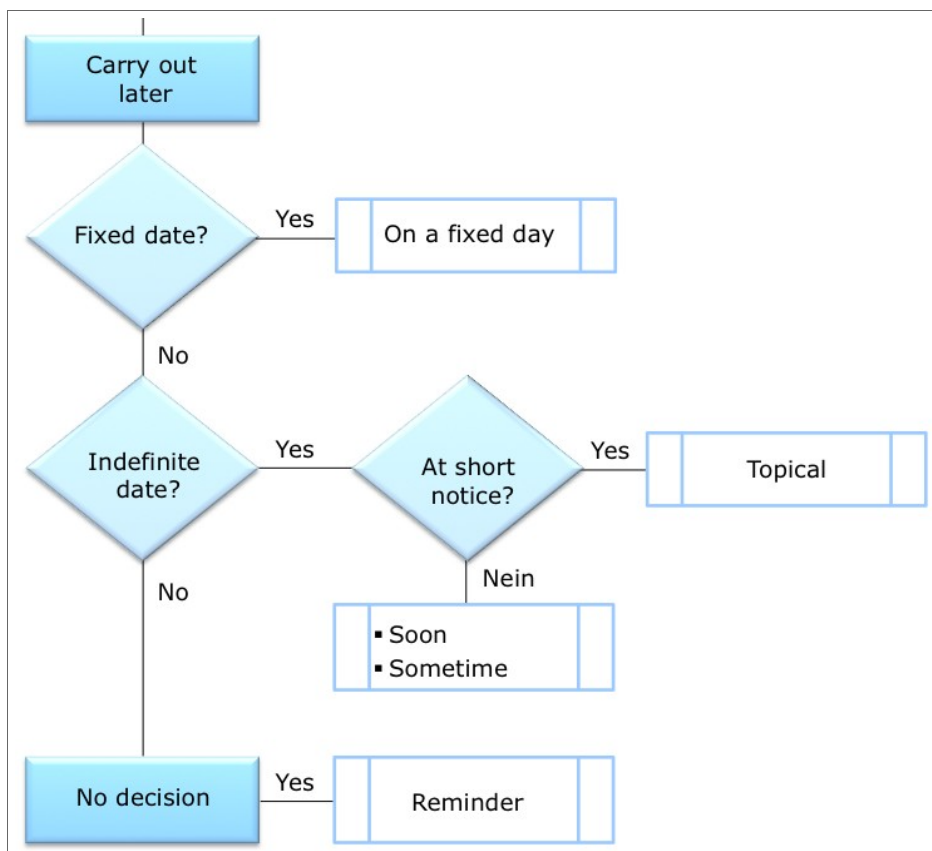
Page 10

→ Should I deal with the task quickly?

Page 11


→ I cannot decide now.

Page 13



You cannot attend to the e-mail immediately or delegate it, then move the e-mail in a few seconds from the inbox in the to-do lists.

Proceed as follows:

 Carry out later

Carry out later

What can be done, if you do not wish to immediately create a task from an e-mail? If you hardly have any time to read the e-mail properly? You remind yourself: the aim is to manage all e-mails from the inbox as to-dos in a system.

Thus, send the e-mail to the ToDo Manager with the click of a button. This allows you to monitor the task constantly and process it at the given time and in peace.

Fixed day

Assume that you are gearing up for a holiday. You must inform your wife within a specific time whether you can book the journey on the desired date. Then create a to-do with a fixed date:

- 1 Activate menu **process mail** in the ToDo Manager window **to the right below**.
- 2 Mark an e-mail in your inbox and click on **carry out later**.
- 3 Set the required parameters in the **ToDo dialog box**:

NOTE:

If the ToDo Manager is linked to an address database, you can call up contact data of the concerned person with a click.

- In the field **Activity (to do)** the subject heading of the e-mail is accepted as the default. If required, overwrite it with the text "Call Betty by noon for planning the holidays (decision to be taken today)", mostly with the telephone number. When you are dealing with an entire list of telephone calls, you save time on searching for the correct telephone number.
 - Mark **on a fixed day**. Depending upon the requirement, select any **date**, for example February 12, 2010 and assign a **time**.
 - Optionally, enter the field **categories** "telephone calls" or select this category in the drop-down menu (right arrow).
 - Activate **Remove document from inbox**, if you wish to delete the original e-mail from the inbox with this procedure.
- 4 Confirm with **OK**.

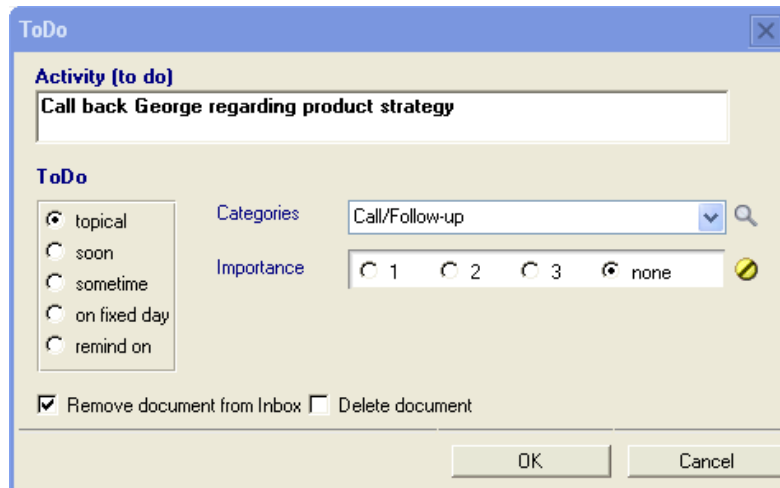
You find this follow-up here:

Click on the top on the **appointments tab** and to the right below on **follow-ups**. More information is available under **Appointments view in ToDo Manager window** on page 44.

Indefinite dates: Topical, soon, sometime

Assume that the outcome of an e-mail is that you must call back George as soon as possible regarding product strategy.

- 1 Mark an e-mail and click to the right on **complete later**.



- 2 Set the following parameters in the open **ToDo dialog box**:

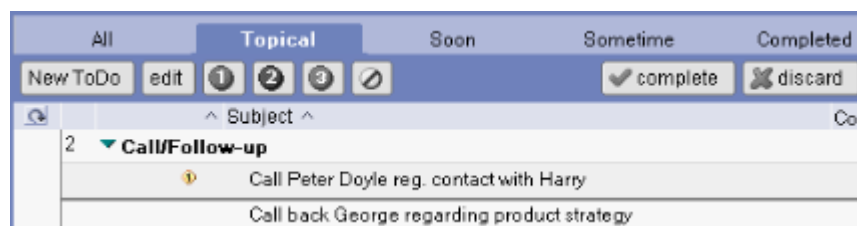
- Overwrite the text in the field **Activity (to do)** with the task "Call back George regarding product strategy".
- Now it is important that you set the task at **topical**, because you wish to process it immediately
- Enter "telephone calls" in the field **categories** or select this category in the combo box (right arrow).
- Activate **Remove document from inbox**, if you wish to remove the e-mail from the inbox simultaneously.

- 3 Confirm with **OK**.

If you wish to create a **soon** or **sometime task**, proceed in the same manner and set the to-do at **soon** or **sometime**.

Find your topical follow-up here:

- 1 Click to the right below on the menu **tasks**.



- 2 The monitoring window for **tasks** opens without specific dates.

- If you wish to enlarge the window, move the left bar towards the left.
- Click on the **topical tab** and then on the lower list on **telephone calls**. There you will find the task "Call back George regarding product strategy", which you have just created.

- 3 Mark the task and click on **edit**, if you wish to change the parameters.

MORE ON THE TOPIC:

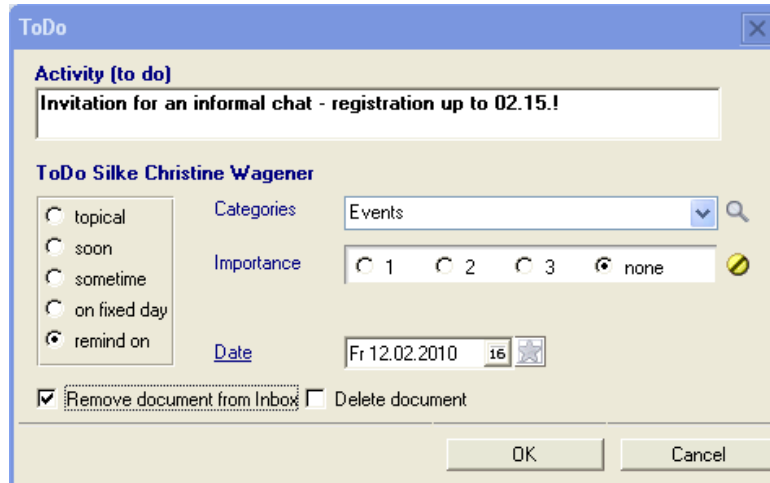
Here you can get more details on the monitoring window:

- Monitor tasks without deadlines
Page 45
- The outcome: a system of electronic lists
Page 13
- How to keep on track-
Page 14
- Part IV – Monitor to-dos in views
Page 42

Reminders

Assume that you have received an invitation for an event and you don't want to immediately make a decision regarding participation. Then set a reminder in time just before the expiration of the registration date.

- 1 Mark an e-mail in your inbox and click to the right on **complete later**.



MORE ON THE TOPIC:

→ Priorities
Page 36

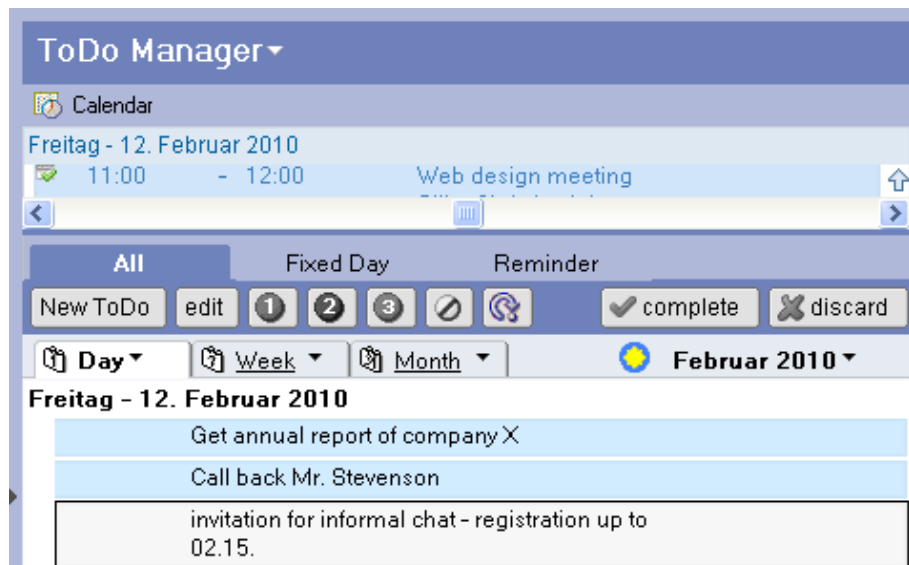
- 2 Make an entry in the field **Activity (to do)** for example the text "Invitation for an informal chat - registration up to 02.15.!" .
- 3 Set this task at **remind on**. Select a date, for example February 12, 2010.
- 4 Confirm with **OK**.

Find the reminder again here:

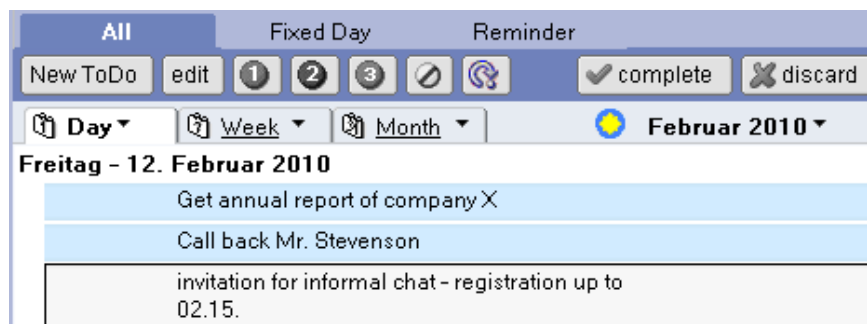
- 1 Click on **the ToDo Manager window** to the right below on the menu **appointments**.

ILLUSTRATION:

In the appointments view, you have your Lotus Notes calendar and to-dos with appointments and reminder dates in the overview at the same time.



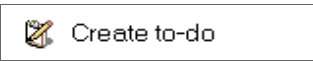
- 2 The monitoring window **Appointments** opens. In the upper part you find the daily entries of your personal Lotus Notes calendar, below that your to-dos with **fixed day** and **remind on**.
 - If you wish to enlarge the window, move the left bar towards the left.
 - Search February 12, 2010, wherein, you browse and/or scroll towards the left or the right on the lower bar.

**MORE ON THE TOPIC:**

→ Appointments view in
ToDo Manager window
Page 44

On February 12, 2010, ToDo "Invitation for informal chat - registration up to 02.15." is shown as a **gray** entry, symbol for a **follow-up with a reminder date**.

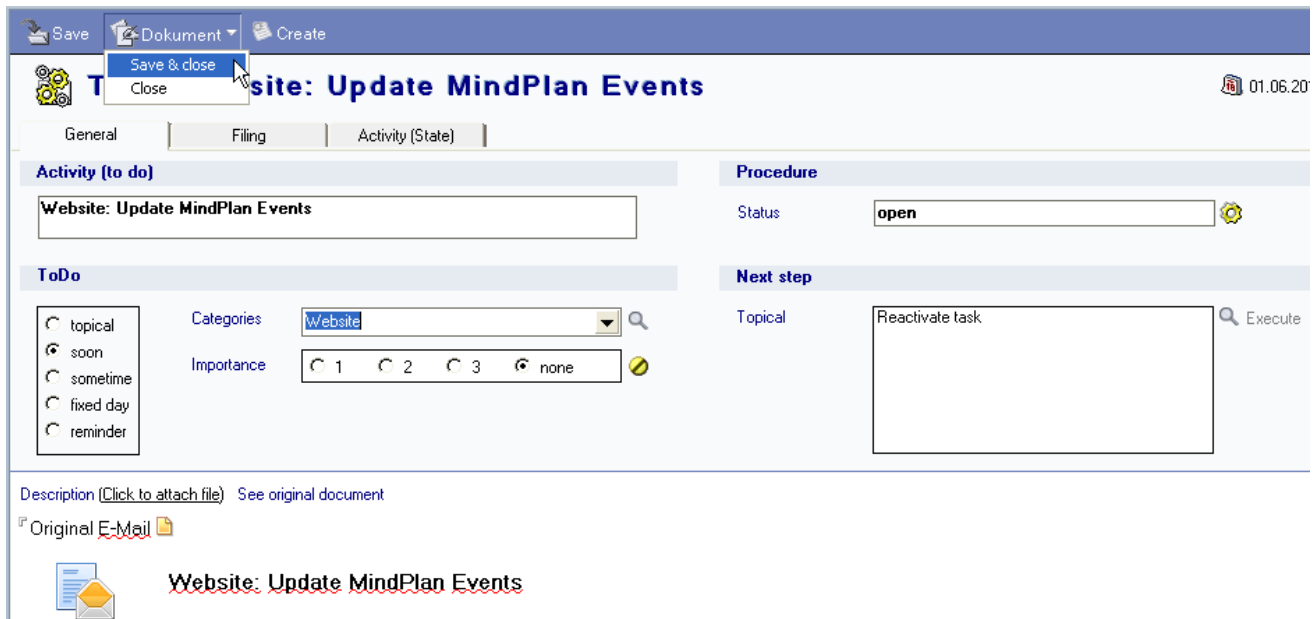
Follow-ups with fixed deadlines - for better differentiation- are shown as **blue** entry.



Create to-do

If you wish to process a task thoroughly, then use the menu item **create to-do**, for creating a Lotus Notes document with the to-do functionality from your e-mail. Besides your original e-mail you can also add additional information, appendices and notes. Proceed as follows:

- 1 Mark an e-mail in your inbox.
- 2 Click to the right on the **ToDo Manager window** on **create to-do** under **schedule mail**.



- 3 The e-mail was transferred into a Lotus Notes document with the specific ToDo Management functions. The original e-mail can be found again in the **Description** field at the bottom.
 - Enter the task in the field **Activity (to do)**. If required, overwrite the preassigned text that originates from the subject heading of the marked e-mail.
 - Specify the task for example with **soon**.
 - Enter a key word (e. g. Website) in the field **Categories**.
- 4 Click on on the top menu **Document** → **Save & close**.

Find this task again here:

- 1 Click on **the ToDo Manager window** to the bottom right on the menu **tasks**.
- 2 Click on the **soon tab** and open category **Website** in your list. The task is now a part of a to-do list, in which you wish to manage all tasks related to **Website**.

New ToDo Create to-dos without e-mail

Till now you have seen how easy it is to convert e-mail into to-dos. You can certainly create to-dos irrespective of the e-mails as well.

Example: You meet a colleague in the corridor and strike up a conversation with him. You promise the colleague that you will establish contact with a good business colleague. Again a to-do, which you can include in your **telephone call list!**

- 1 Click on the view on your ToDo Manager and select **new to-do** button at the top.



- 2 A Lotus Notes document opens, with the ToDo Management functions, which you already know.
 - Enter in the field **Activity (to do)** text "Call Peter Doyle regarding contact with Harry".
 - Set this task at **topical**.
 - Enter "call" in the field **categories** or click on the right magnifying glass with which the drop-down menu opens. In it you will find all the keywords you have used till now for the categories.
 - You can make additional notes or attach files in the **description** text field at the bottom.
- 3 Select the menu item **document** → **save & close**. If you wish to keep the document open, simply click on **save**.

You can find your task again here:

Click on the ToDo Manager window and select **tasks** and open the **telephone calls** list.

PART III – MAINTAIN AND COORDINATE TO-DOS

Buttons

New ToDo

New ToDo

Create a new follow-up by clicking on **new ToDo**. You can change the status to topical, soon, sometime or a fixed day anytime.

edit

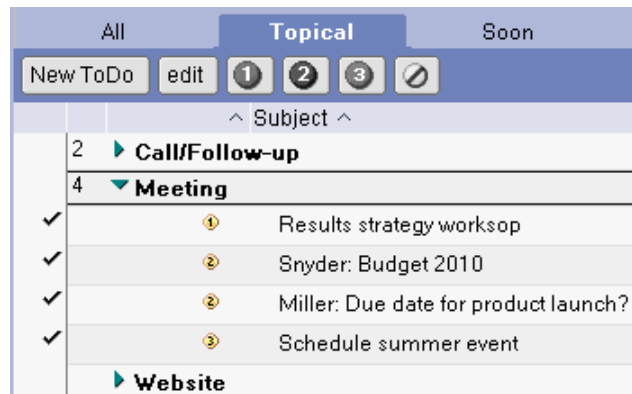
Edit



- 1 Mark one or several tasks and click on **edit**.
- 2 A dialog box, in which you can reassign the attributes of schedule, category of priority, opens: schedule, category or priority. If you have marked an individual task for editing, you get the attribute you had allocated to this task earlier displayed in this dialog box. The dialog box is empty if several tasks are marked.
- 3 Confirm with **OK**.

Example: Edit categories

For every task you can change the category **subsequently** or even structure your to-do lists **in a hierarchy**. We can see this from an example of a to-do list:

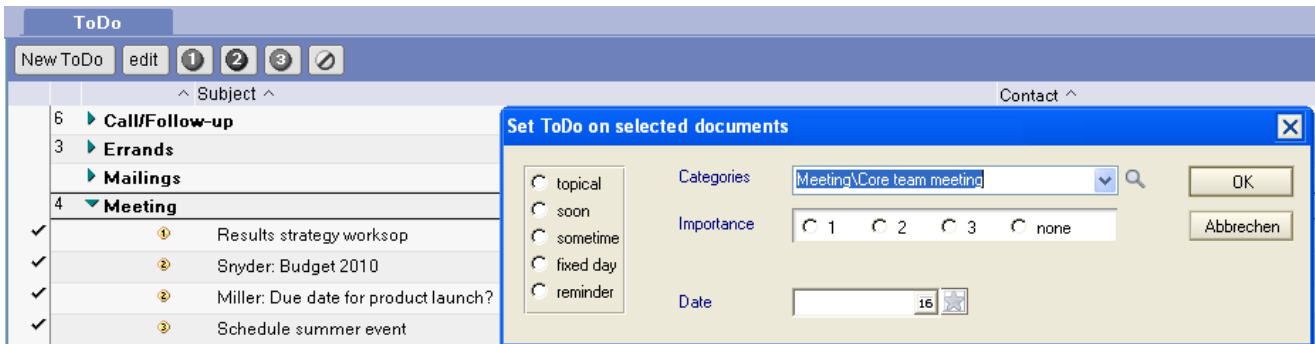


Assume that you have saved all topics for the next core team meeting in a to-do list. Now you find that you should sort various meetings under the

main point "meeting".

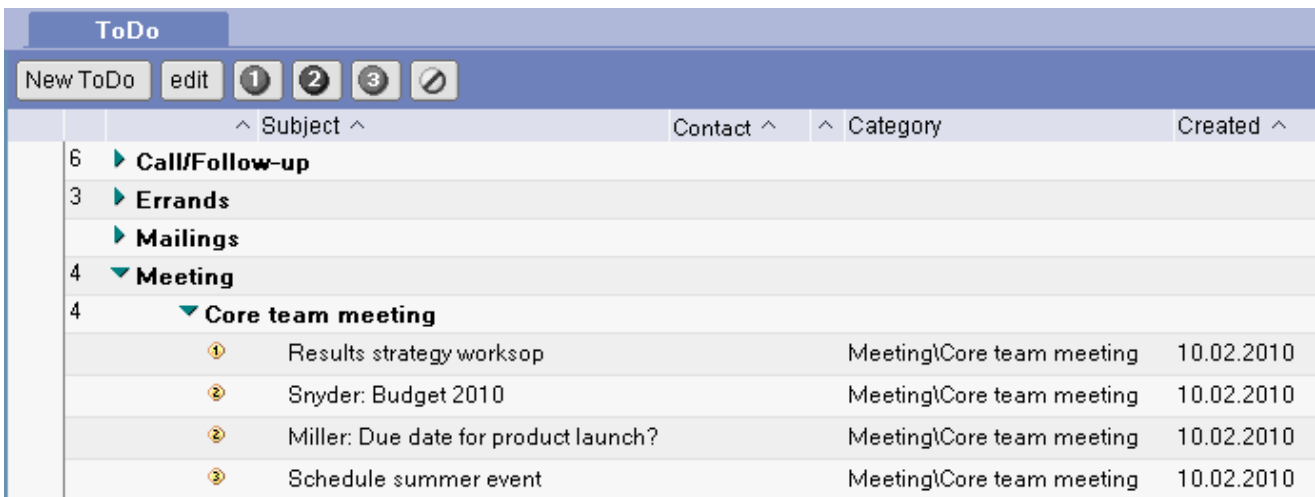
You proceed in this manner for setting up the desired hierarchy:

- 1 **Mark all to-dos** under core team meeting and click on **edit**.



- 2 Enter "Meeting\Core team meeting" in the field **Categories**. Separating with a \ (backslash) creates a subfolder.

- 3 Confirm with **OK**.



Now the core team meeting is listed as the subfolder **Meeting**. For every to-do that you wish to place in a specific subfolder under meeting, always enter `Meeting\name-meeting`.

Examples for categories

You can structure your numerous to-dos in Weilgut ToDo Manager as per specific categories. These proven categories are provided as a standard selection in the ToDo Manager:

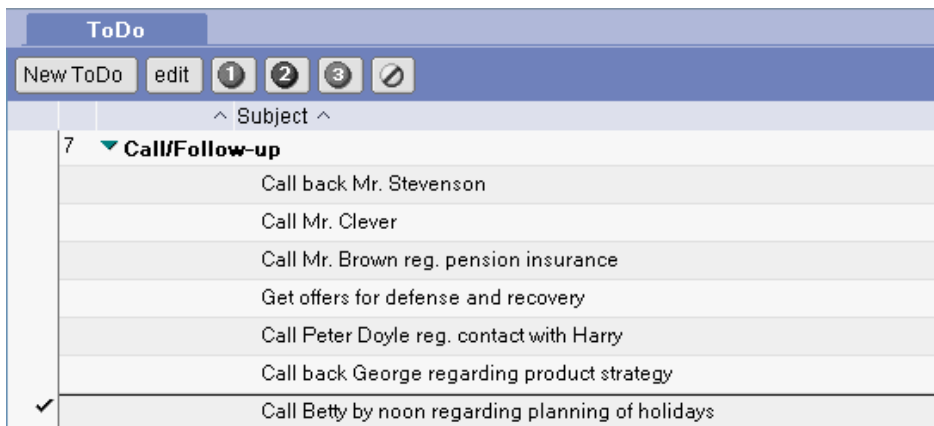
- **Call/Follow-up:** You thus get an overview of all follow-up actions, which you wish to execute – irrespective of project or process.
- **Wait for reply:** With that you get an overview of the requests sent to others.
- **Errands:** Here you bring up everything that you wish to procure en-route. For example if you drive to the car wash or want to procure a mat for the reception area from the wholesale market.
- **Meeting:** Here you collect all topics that you wish to discuss with specific persons in the next meeting.
- **Delegate:** All topics that you wish to delegate.
- **Customers:** All topics concerning specific customers.
- **Read:** Interesting information you wish to read later.
- **Marketing:** All topics you wish to undertake as part of marketing. You can create such lists for all divisions of your company, then you can call these up as soon as you have a meeting with the representatives of these divisions. For example marketing, product development or after-sales.
- **Online:** If you travel a lot, you only have specific time periods where you are online. Collect anything you need to execute when being online in a special online list.
- **Advanced training:** All points concerning advanced training for your staff.
- **At home:** List the activities that you should complete at home. For example getting a baseball for a seminar.



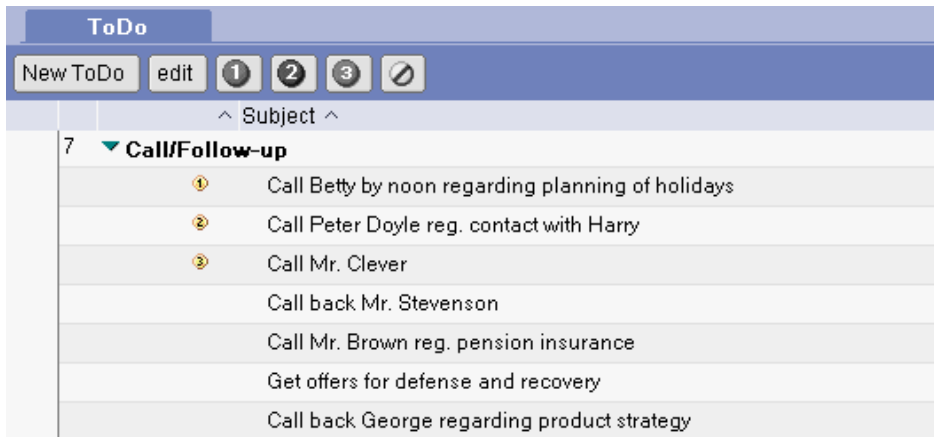
Priorities

Sort your tasks with the buttons **priority 1 to 3**. Remove the priority by clicking the symbol **no priority**.

- 1 Open your list of **telephone calls**. Tasks are listed in the sequence you have created them.
- 2 Mark "Call Betty by noon regarding planning of holidays".



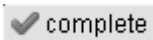
- 3 Click on the top **button 1**. From the small symbol before the task text you know the priority assigned to this task.
- 4 Now mark the task "Call Peter Doyle ..." and click on the top **button 2**.
- 5 Then mark the task "Call Mr. Clever ..." and click on the top **button 3**.



The outcome:

- All tasks with priorities are marked in the to-do lists with a yellow symbol before the topic.
- Tasks with priorities are listed at the top of the list in the assigned sequence.

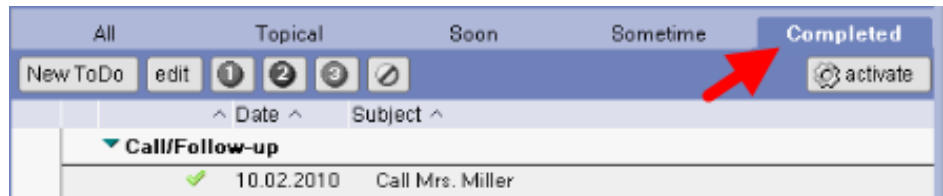
Application of priorities in ToDo Manager makes sense, if you have listed many tasks in a category. You can thus sort the topical, soon and sometime lists as per their importance.



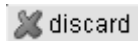
Complete

Use this function when you have completed a task and wish to document it in your ToDo Manager.

- 1 Mark a task.
- 2 Click on the **complete** button.



Find **completed tasks** in the view **Completed** showing a **green check mark**.



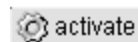
Discard

Use this function, if you have created a task but do not wish to complete it.

- 1 Mark a task.
- 2 Click on the **discard** button.

Discarded task are marked with a **red x**. The difference from the **complete** function is that the task was rejected without being completed.

Benefit: This function allows you to document that the task was already considered but was discarded and was hence not completed.



Activate

- 1 Mark a completed or discarded follow-up or task.
- 2 Click on the **activate** button for marking a task as incomplete. Depending upon the assignment, activated tasks in the topical, soon or sometime lists. Activated follow-ups are again managed as incomplete (without a green checkmark).

Tabs

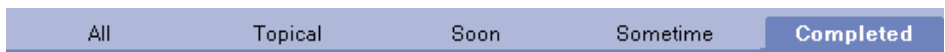
All, Fixed Day, Reminder



Use the upper tab change to views **All, Fixed Day, and Reminder**, which contain to-do lists filtered as per these criteria.

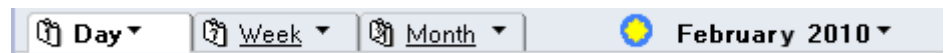
For how to set individual filters read **Filter view in the ToDo Manager window** on page 45.

Topical, Soon, Sometime, Completed



Use the upper tabs to change between views **All, Topical, Soon, Sometime, Completed**. This displays the to-dos, to which you have assigned the respective attribute.

Day, Week, Month



Change between daily, weekly, and monthly views, by activating tabs **Day - Week - Month**.



By clicking the **symbol** you display today.



By clicking on the **month** you chose specific days.

Edit lists

Sort lists

	^ Subject ^	Contact ^	Reminder ^	Category	Created ^
7	▼ Call/Follow-up				
	① Call Betty by noon regarding planning of holidays			Call/Follow-up	01.06.2010
	② Call Peter Doyle reg. contact with Harry			Call/Follow-up	12.02.2010
	③ Call Mr. Clever			Call/Follow-up	10.02.2010

You can sort your lists by clicking on the top column menus. The first column enables sorting as per **priorities**, other columns as per **topic, contact and remind on**.

Application examples:

If you wish to sort the lists as per **priority**, you quickly get an overview of what you have to do next, irrespective of the category.

If you wish to find a recently created task, you have the option of sorting as per **created**.

Open and close a list

4	▼ Meeting
4	▼ Core team meeting
	① Results strategy worksop
	② Snyder: Budget 2010
	② Miller: Due date for product launch?
	③ Schedule summer event

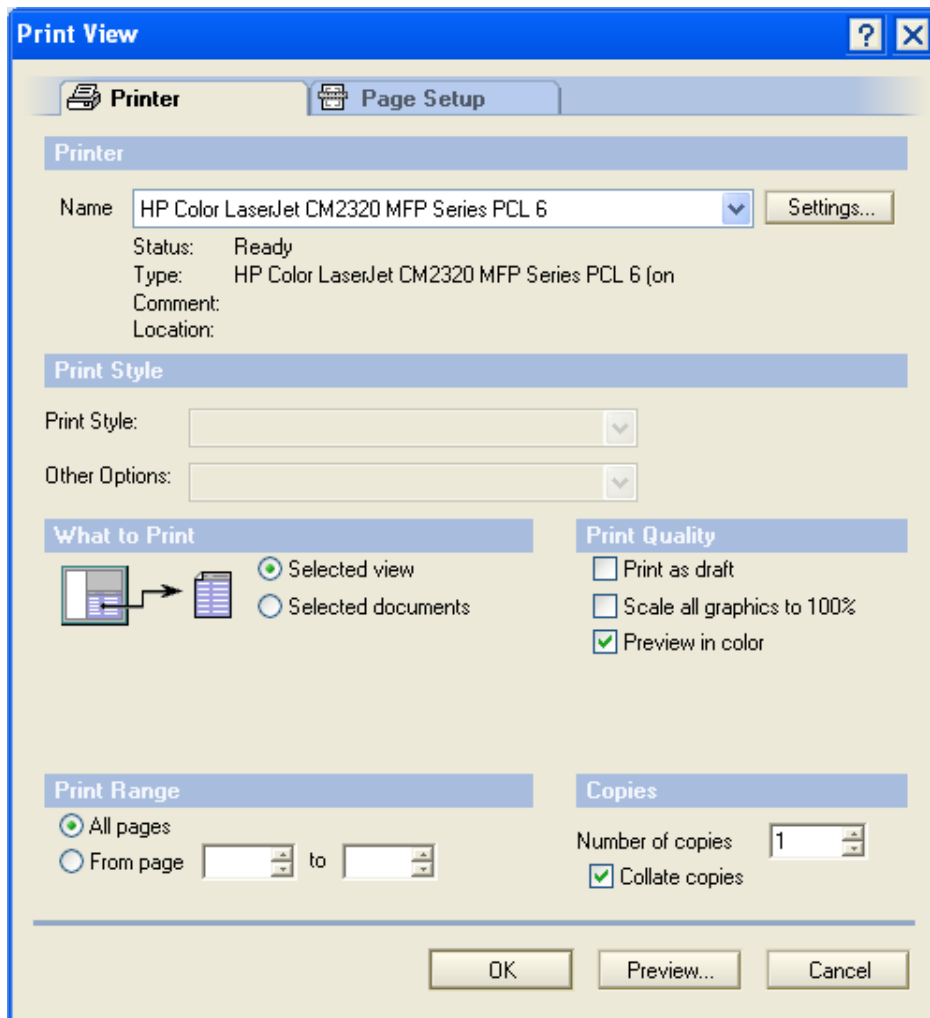
Browse the lists up and down, by clicking on the small arrow in front of it. Arrows facing the right indicate a closed list and arrows pointing downwards indicate an opened list.

You can open all lists of a view with the keyboard combination **CTRL +**.

Printing

Print tasks

Use the print Lotus Notes function for printing your tasks.

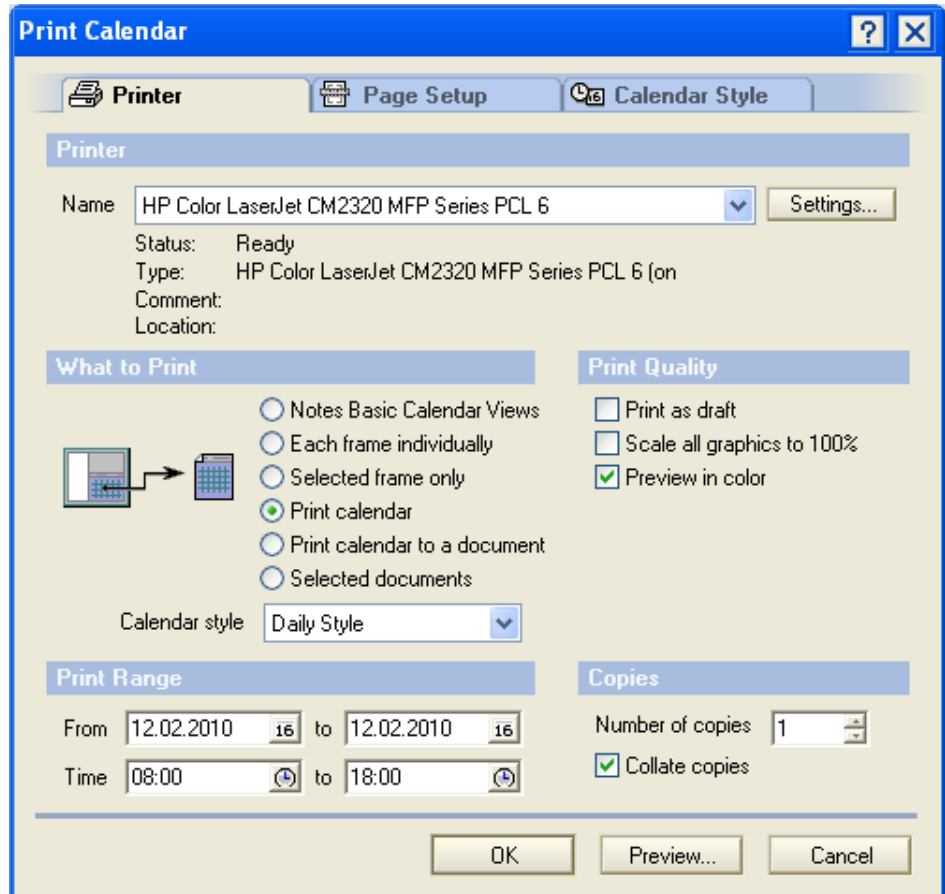


- 1 Select **file** → **print**.
- 2 Mark **selected view** in the window that opens.
- 3 Click on **Preview...**, if you wish to see the print edition before printing.
- 4 Select other parameters as usual, for example number of copies.
- 5 Confirm with **OK**.

Print calendars

Use this Lotus Notes standard function for printing your calendar.

- 1 Open the top tab appointments.
- 2 Select **file** → **print**.

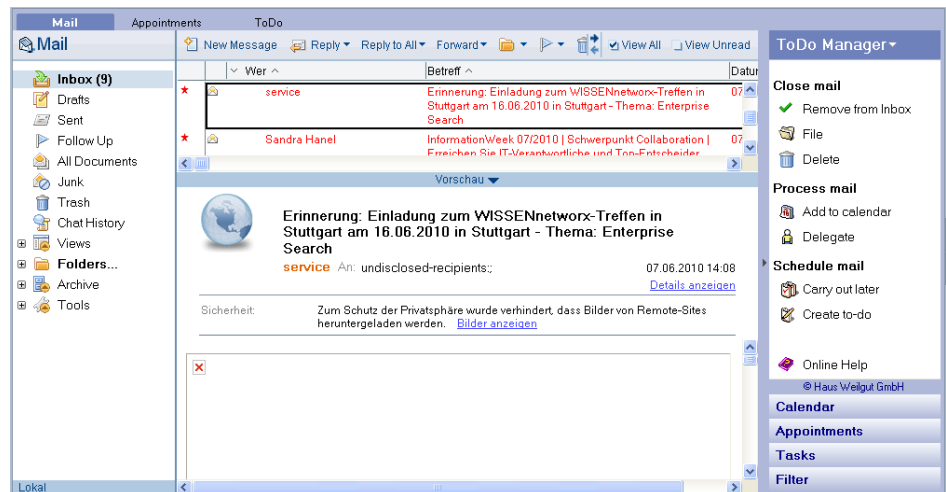


- 3 As usual make a selection from your Lotus Notes for the desired print result, for example day or week style.
- 4 Click on **Preview...**, if you wish to see the print edition before printing.
- 5 Confirm with **OK**.

PART IV – MONITOR TO-DOS IN VIEWS

The Mail tab

The Mail tab is set up by default as the home page for the ToDo Manager. In this user interface, the inbox is on the left, the ToDo Manager window to the right of it.



If the **mail tab** is active, you can shift into your Lotus Notes calendar, appointments and tasks in the ToDo Manager window on the right:

- **Calendar:** enables you to keep an eye on the inbox and the calendar in Lotus Notes simultaneously.
- **Appointments:** enables you to keep an eye on your inbox and simultaneously monitor your to-dos with fixed appointments and your reminders.
- **Tasks:** enables you to keep an eye on your inbox and simultaneously monitor your to-dos without specific appointments.
- **Filter:** Opens a dialog box, with which you can filter all your to-dos as per specific criteria and get a display in a sorted view.

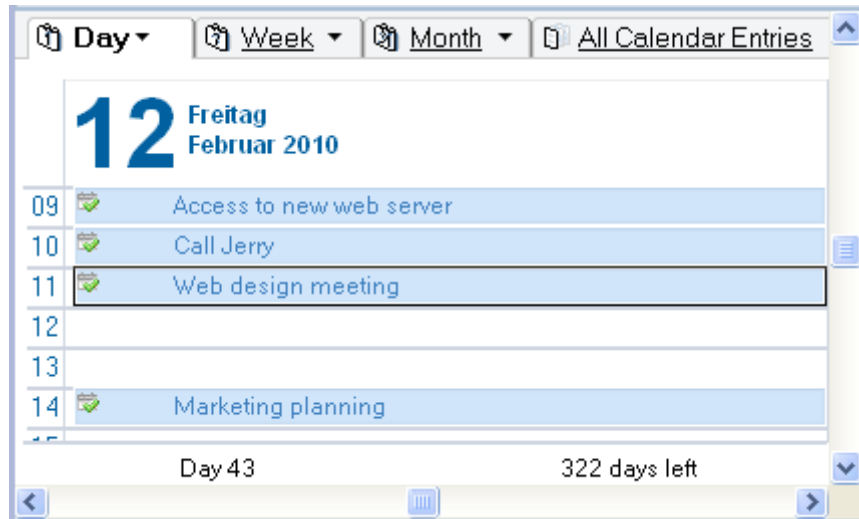
NOTE:

Select cockpit view if you have a screen resolution of 1280x1024 pixels or higher. Click on the top to the right on ToDo Manager and select Cockpit (combined view).

Calendar view in the ToDo Manager window

Monitor inbox and calendar

- 1 Click on the **calendar menu** on the ToDo Manager window on the right at the bottom. A Lotus Notes calendar opens in the window on the right.

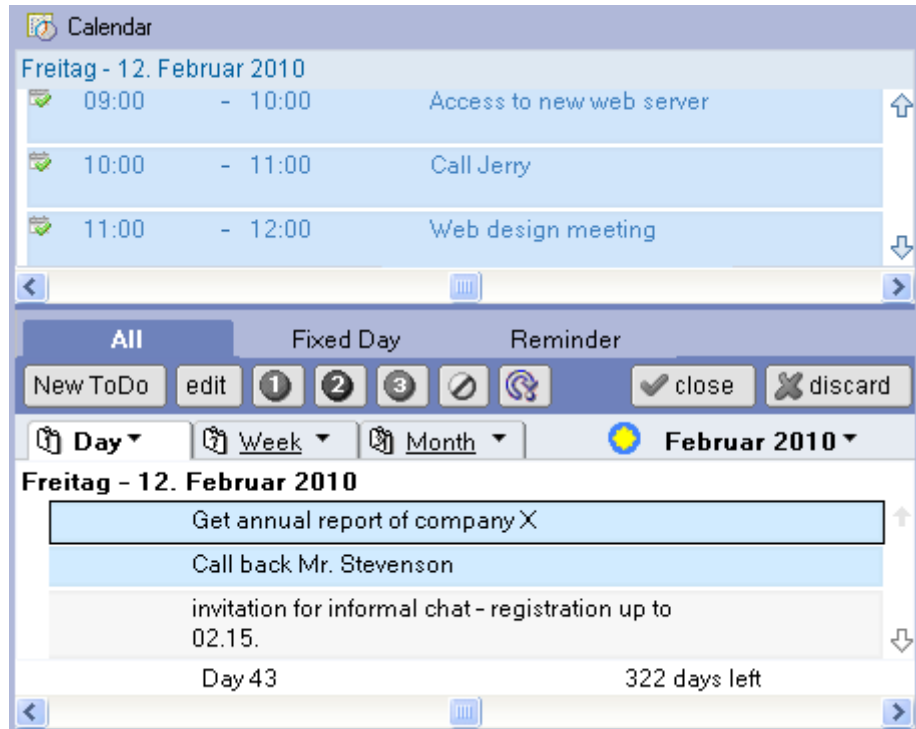


- 2 Select between **daily, weekly and monthly view** or the list for viewing **all calendar entries**.
- 3 Edit your calendar as usual and monitor your incoming e-mails simultaneously.

Appointments view in ToDo Manager window

Monitor follow-ups and calendar

- 1 Click on the right on the **ToDo Manager window at the bottom** on the **appointments menu**.

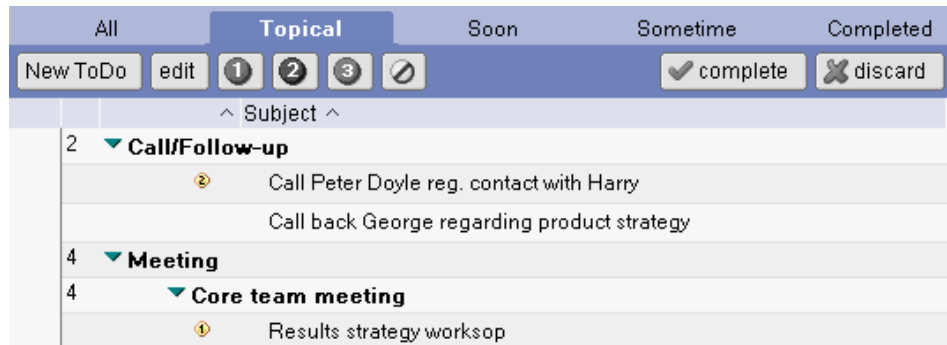


- 2 This view shows the calendar with the daily overview on the top and below it an overview with all follow-ups to which you have assigned a fixed appointment or reminders.
 - **Blue** entries are follow-ups with **fixed appointment**.
 - **Gray** entries are follow-ups with **reminders**.
- 3 Click on the heading **calendar** below the ToDo Manager for opening your Lotus Notes calendar.

Tasks view in the ToDo Manager window

Monitor tasks without deadlines

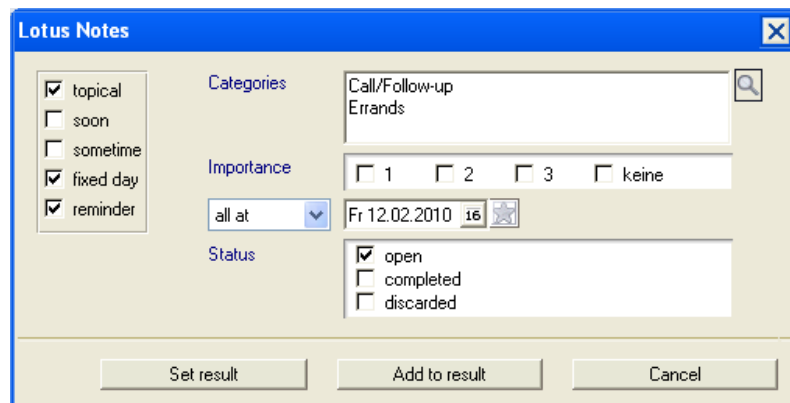
- 1 Click on the **Mail tab** at the top.
- 2 Click on the right on the **ToDo Manager window** at the bottom on the menu **Tasks**.



- 3 This view shows the to-do lists with the tasks to which you have assigned the values of topical, soon, or sometime.
- 4 With the upper tabs change between to-do lists **all**, **topical**, **soon**, and **sometime**. You can call up completed tasks under **completed**.

Filter view in the ToDo Manager window

Go to the filter for generating a reduced view of your to-do lists. In this dialog you have the option of combining various filter criteria:



Example

Assume that you wish to see all open to-dos for today and all topical tasks in a list.

- Set a checkmark for topical, on fixed day, and remind on.
- Select today's date.

You can even filter your to-dos by

- entering specific **categories** or select them with the magnifying glass on the right.
- selecting specific **priorities**: If you set a checkmark for priority 1, 2, 3 or none, only to-dos with these attributes are displayed. If you do not set a checkmark, all to-dos with these attributes are listed.
- displaying open, completed, or discarded to-dos only: Set a checkmark for **open**, **completed** and/or **discarded**.

You can cancel the process by clicking on **cancel**.

Procedure

You can define all criteria in a filter process or limit additionally an already filtered list.

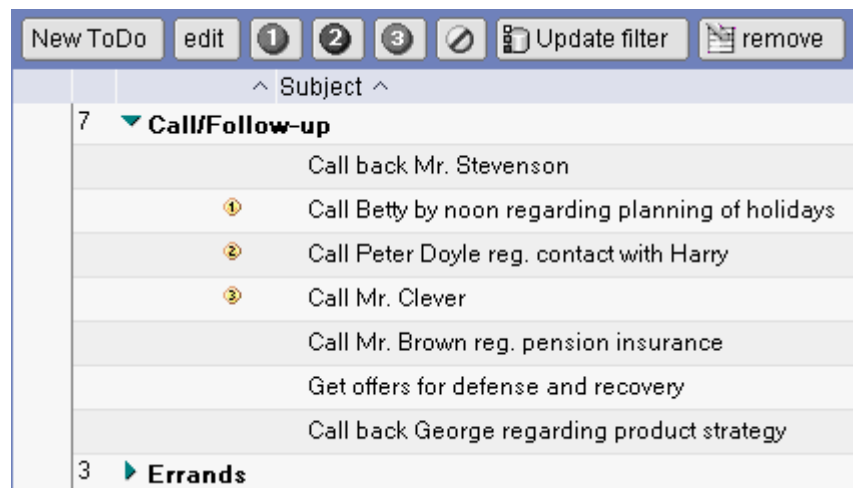
- You can re-filter your to-dos as per the input criteria by clicking on **set result**. The current filtered list is replaced.
- By clicking on **add result** you complete the current filtered list with additional entries.

The outcome:

You get an idea of all to-dos in an overview based on the selected parameters.

ILLUSTRATION:

Example of a filtered to-do list

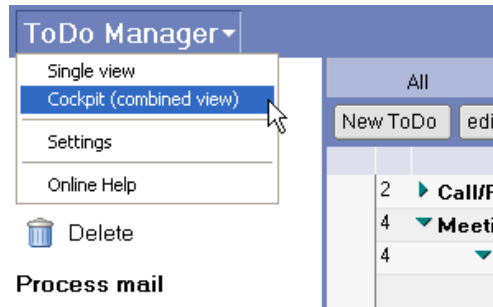


If you wish to limit your to-do list further, proceed as described above. Or simply delete those to-dos, which you do not wish to have in this folder with the **delete** button. They are not deleted from the ToDo Manager, as long as you are in an active filter view.

Caution: Deleting to-dos with the delete key on your keyboard, moves to-dos to the trash. They can be retrieved from the trash as long as they are not emptied from the trash.

Select between single and cockpit view

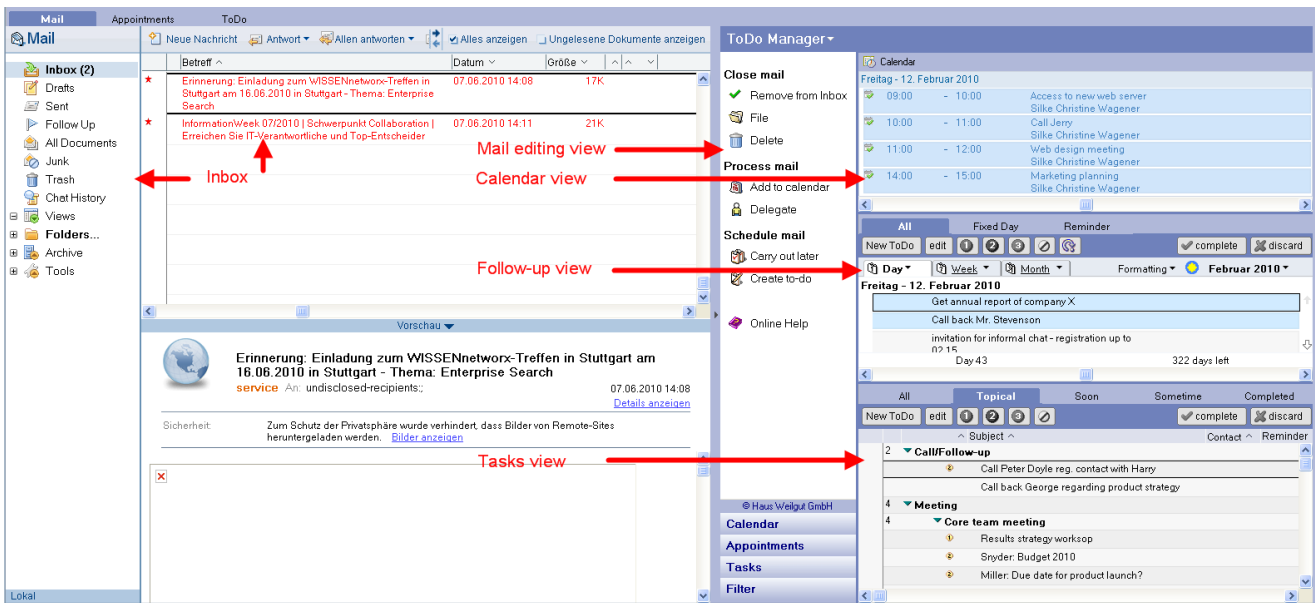
You can select between single and cockpit view, when the Mail tab is active.



- 1 Click to the right on **ToDo Manager**.
- 2 Select **cockpit (combined view)**.

The cockpit enables you to keep an eye on your inbox on the left and display all views **Calendar**, **Mail editing**, **Follow-ups** and **Tasks** within the ToDo Manager window:

The cockpit displays the entire day's business.



Note: The cockpit setting is recommended for a screen resolution of 1,280 pixel breadth and 1,024 pixel height or higher.

ILLUSTRATION:

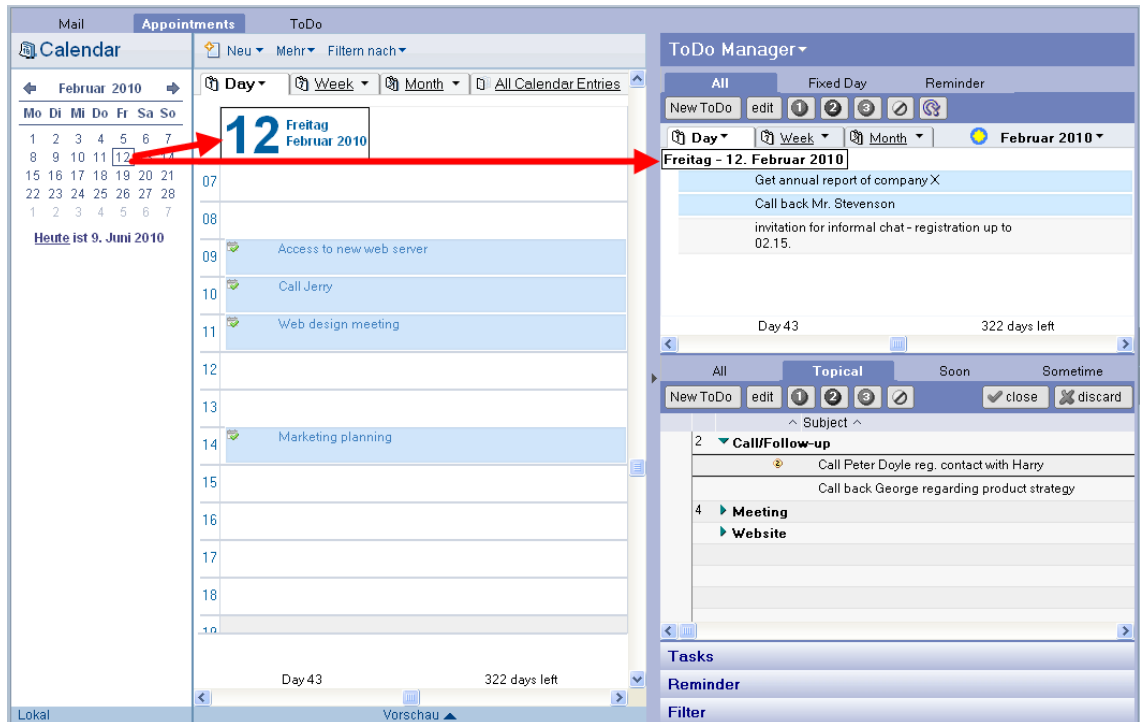
Manage e-mails in the Mail editing view and simultaneously monitor calendar, follow-ups and tasks.

The Mail editing view is described in Part II – Edit e-mails and create to-dos page 17.

For a description of calendar, appointments, tasks and filter views refer to The Mail tab on page 42.

Appointments tab

By clicking on the top appointments tab, you get an appointment-oriented user interface. Your Lotus Notes calendar is at the center of the window, the ToDo Manager to the right of it. You get a concurrent overview of all appointments and tasks.



By default the current day is displayed in the calendar on the left as well as in the follow-ups on the right.

- With the **small calendar on the left** set the date of the calendar views to a specific day.
- If you **change the date in one of the individual views**, this will only effect this view.

Available menus

If the **appointments tab** is active, you can shift between your follow-ups and tasks simultaneously or individually in the ToDo Manager window on the right:

- **Follow-ups:** enables you to keep an eye on the calendar and simultaneously manage your follow-ups **on a fixed day** and **remind on**.
- **Tasks:** enables you to view the calendar and simultaneously monitor your **tasks without deadlines**.
- **Tasks & follow-ups:** enables you to view the calendar and simultaneously monitor your to-dos. You monitor all to-dos in the **follow-up** window at the top, which you have specified with a fixed deadline or reminder. You can monitor all to-dos for which you have not provided a specific deadline in the **tasks** window at the bottom.
- **Filter:** opens a dialog box, with which you can filter all your to-dos as per specific criteria and get a display in a sorted view.

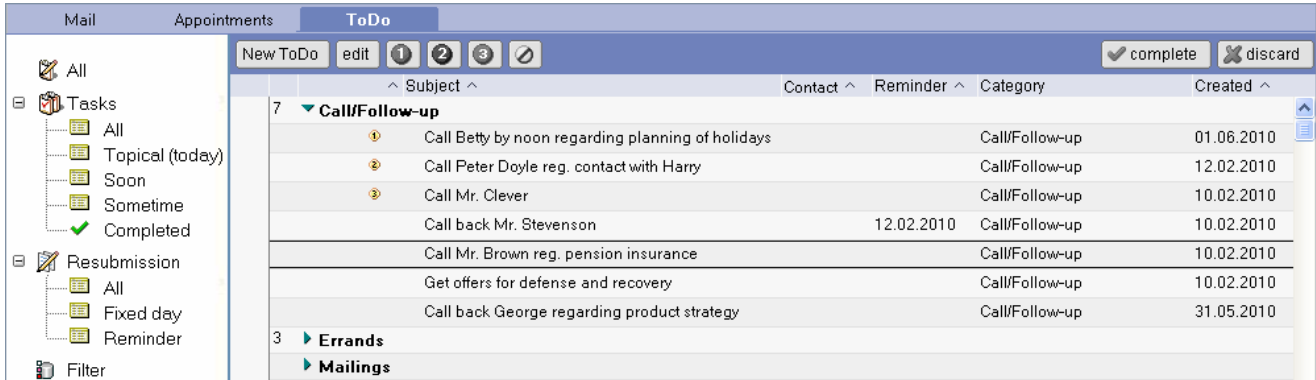
MORE ON THE TOPIC:

Individual controls have been described in detail in these chapters:

- ➔ Appointments view in ToDo Manager window
Page 44
- ➔ Monitor tasks without deadlines
Page 45

ToDo tab

By clicking on the **ToDo tab** at the top, you get an overall picture of your to-dos spanning the entire screen breadth.



In the left menu, click on

MORE ON THE TOPIC:

Detailed description for individual controls:

→ Part III – Maintain and coordinate to-dos
Page 33

→ Filter view in the ToDo Manager window page 45

- **All** in order to display all tasks and follow-ups.
- **Tasks** → **All**, if you wish to display all tasks. Click on **Topical**, **Soon**, **Sometime**, or **Completed** for filtering the list as per criteria.
- **Follow-ups** → **All**, if you wish to display only the follow-ups. Click on **Fixed day** or **Reminder**, if you wish to display the list only as per these criteria.
- **Filter**, if you wish to filter your to-dos as per various criteria.

PART V – TIPS AND TRICKS

Now more than ever - All about the inbox?

In parts I through III you have seen that the inbox is very useful, if you make the most of it. At this point we would like to mention three other important aspects:

Paper mail? In the e-mail inbox!

by the above mentioned approach, your electronic mail has been well taken care of. But what to do with the paper? To avoid managing two simultaneous storage systems - electronic and paper - simply scan the paper copies! Modern copiers have scan functions with which you can scan several pages and send them directly to your inbox as e-mail.

Example: You will receive an invoice for a service that relates to your project, or you have to send a manually filled form as registration for an event. Scan the documents, send the scans directly to your inbox and add them to the document file for the concerned project with the ToDo Manager, or send the e-mail along with the scan through the ToDo Manager as a follow-up.

This way your colleagues can also get information received in paper form through electronic document storage.

Too many e-mails? Clear them!

Do you regularly delete the same newsletter from your inbox without reading it? Check, which newsletters are important for you, by giving them a kind of probationary period. If you do not need any important information after expiration of the probationary period, unsubscribe from the newsletter and set a favorite link on the website of the provider instead.

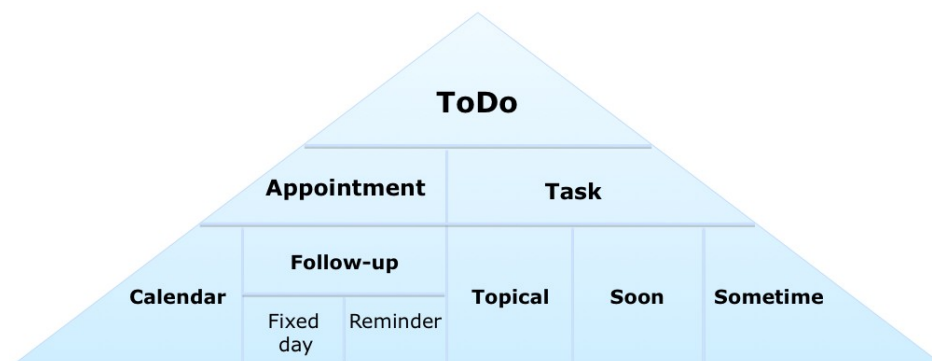
A second option is to delete your name from mailing lists. Advertisement mails are often sent to general addresses like info@...and rarely include information required. With ten people on the mailing list, ten people will regularly delete trash from their inboxes – an unnecessary waste of personnel time.

Reduce the e-mail flood

Think about what you can do to reduce your own e-mail flood as well as that of your colleagues. Instead of replying or forwarding e-mails, manage them in ToDo Manager and attend to them at the given time, for example when you are going to meet the respective person at a meeting anyway.

APPENDIX

Definition ToDo



ToDo: All the activities having a specific or unspecific deadline, which you can create, manage, and monitor with the Weilgut ToDo Manager.

Appointments: An activity, which must be completed at a specific time or for which you wish to be reminded.

Calendar: All activities that you need to complete at a specific time or location and possibly with specific persons can be managed by you as usual with the Lotus Notes calendar: Meetings, workshops, errands enroute, regular meetings, appointment time blocker for the preparation of customer presentations or the like.

Follow-up: All processes, that need to be pre-allocated at a specific time. Example: "Must call Snyder on Friday regarding takeover of activities as he will be on holiday for two weeks".

- **Fixed day:** A follow-up with a specific deadline.
- **Remind on:** A follow-up with a reminder date, without the task being completed on this deadline.

Task: All activities that you need to complete on an unspecified deadline.

- **Topical:** If a task must be executed at short notice, then specify it "topical". By checking your to-do list you can immediately come to know which tasks (without fixed deadline) are most urgent.
- **Soon:** Activities that cannot be completed at short notice should be specified with "soon".
- **Sometime:** There are a few e-mails you may wish to review again "sometime", when everything else has been taken care of. Then specify "sometime" for the task and call it up at the given time. You can thus delete the e-mail from your inbox and retain it exactly where it belongs.

