

Using Todo and Schedule Info

Todo

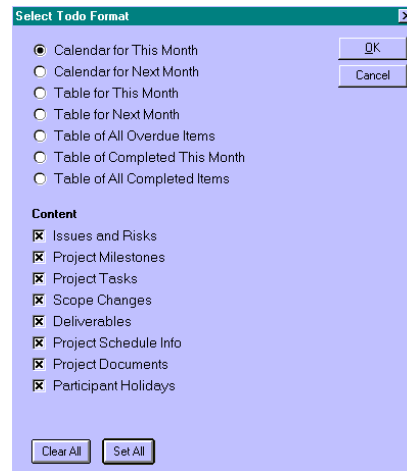
Todo is in many ways the most powerful reporting tool in Project Gateway and yet also the simplest to use.

The Todo function creates a comprehensive report in the format of a month calendar that shows all of the time-dated repository information for that month, including all relevant schedule events.

Todo works for Projects, Programs, Participants, Organizations and Teams to gather together everything that is going on with respect to that entity in as simple presentation.

Using Todo in Notes Client

Selecting the Todo Action will display a dialog box with various options. Select the options and press OK.



If the Calendar format is selected, then a page similar to the following will appear after a pause for data collection.

Calendar for A Deployment Plan For 11/1/01 to 11/30/01						
Sunday, 4 November	Monday, 5 November	Tuesday, 6 November	Wednesday, 7 November	Thursday, 8 November	Friday, 9 November	Saturday, 10 November
Issue OVERDUE FCS Deployment	DOCUMENT NEEDS APPROVAL Transact2 Quality Assurance[]	Task LATE Investigate. (Applegate Tom) DOCUMENT (Customer Release) MISSING FOR (Davidson James) DOCUMENT (Network Analysis) MISSING FOR (Davidson James)	Scope OVERDUE Customer Training			
	Risk DUE Insufficient resources to finish on time	Issue DUE Need to document the server restart procedure			KeyEvent Develop Performance Analysis Tool(Davidson James)	
Holiday Davidson James(Travel to San Diego)	Holiday Davidson James(Travel to San Diego)	Holiday Davidson James(Travel to San Diego)	Holiday Davidson James(Travel to San Diego)	Holiday Davidson James(Travel to San Diego)	Holiday Davidson James(Travel to San Diego)	Holiday Davidson James(Travel to San Diego)
Holiday Davidson James(Travel to San Diego)	Holiday Davidson James(Travel to San Diego)					

Month Calendar Format

Each item on the page will have a doclink that will open the appropriate repository document (issue, scope, assignment, etc.). For Holiday items, the participant profile will be opened. Holiday items will be repeated on each day in the holiday period.

If the Table format is selected the a page similar to the following will be displayed.

Calendar for A Deployment Plan For 11/1/01 to 11/30/01
<ul style="list-style-type: none"> 11/4/01 Issue OVERDUE FCS Deployment 11/5/01 DOCUMENT NEEDS APPROVAL Transact2 Quality Assurance 11/6/01 Task LATE Investigate Customer Training 11/6/01 DOCUMENT (Customer Release) MISSING FOR 11/6/01 DOCUMENT (Network Analysis) MISSING FOR 11/7/01 Scope OVERDUE Customer Training 11/12/01 Risk DUE Insufficient resources to finish on time 11/13/01 Issue DUE Need to document the server restart procedure 11/16/01 KeyEvent Develop Performance Analysis Tool 11/18/01 - 11/26/01 Holiday Davidson James(Travel to San Diego)

The todo report exists as an independent document window in the Notes Client, so you must explicitly close it when you are finished using it. Using doclinks off the Todo form will open additional windows. Opening windows this way will quickly reach the limit allowed by the Notes client.

See the section below for an explanation of the function of each of the options.

Using Todo in a Web Browser

There are two ways to get a todo report from any profile document. The first is to click the "Todo" action at the top of the form. This will generate a complete report.

The other way is to click on "Custom Todo Report" in the Reports section. This will display an options selection page. Submitting that page will generate the calendar or table with the selected options.

The Todo Options

In addition to the choice of visual format (calendar or table) you may choose to show planned or completed . Choosing completed will show only finished work within the selected time period.

All Overdue Work

This will create a table listing everything overdue as of the start of the current month. Items that have become overdue since the start of the current month are not shown in this table, but will be shown on the current month calendar.

All Completed Work

This will create a table listing everything that has been completed prior to the start of the current month.

Schedule Info

The Schedule Info function allows you to record dated events for any project, program, participant, or organization. For participants these events are assumed to be periods of absence such as vacation or travel. For other entities these are simply assumed to be dated events that would be of interest to others. For example, you might use the schedule function to document the days of a trade show or customer visit or to document "big push week" or the project party.

The schedule function is designed to record these upcoming events because they might be important in the context of a particular project or individual. It is not designed as a replacement for your personal calendar or meeting management system. It does not interact with your Notes calendar & scheduling system.

Schedule Info does, however, appear in the Todo Calendar reports. Here it is selected for the context of the report. For example, the schedule info items for all participants assigned to a project will be displayed on a project level todo.

Using Schedule in a Notes Client

Since this function can modify the profile document (by saving new schedule information) it can only be used in Edit mode. So double click

on the profile to edit, and then the Schedule action button will be displayed.

From	To	Activity
11/11/2001	11/11/2001	Offsite Team Building Session

The Schedule Info Dialog Box

The dialog box will be preloaded with the existing events that are still relevant. An item is removed when its completion date is prior to today.

Fill in the desired events and press OK to save them.

Blank entries are ignored, and you do not have to enter items in date order.

To remove an existing event, simply blank out the title. Items without titles are ignored.

If an event is for a single day, you do not need to enter the end date, it will be assumed.

If one or more of the events you have added are in the past, it will be ignored.

To select a date, click the icon next to the field, it will display a calendar.

To record the new events, press OK.

To abandon your changes, press Cancel.