

Using Todo and Schedule Info

Todo

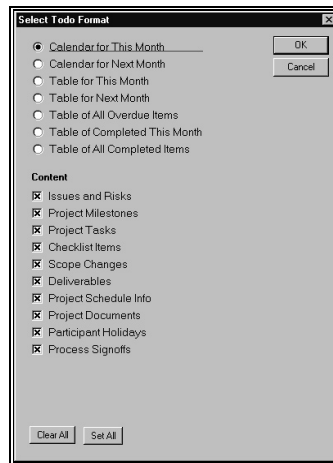
Todo is in many ways the most powerful reporting tool in Project Gateway and yet also the simplest to use.

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 Westriver Documentation For 9/1/04 to 9/30/04						
			Wednesday, 1 September	Thursday, 2 September	Friday, 3 September	Saturday, 4 September
Sunday, 5 September	Monday, 6 September	Tuesday, 7 September	Wednesday, 8 September	Thursday, 9 September	Friday, 10 September	Saturday, 11 September
		<input type="checkbox"/> Task LATE Construct D. Davidson James) <input type="checkbox"/> CK LATE Review corporate std formats <input type="checkbox"/> CK LATE Prepare page definitions <input type="checkbox"/> CK LATE Select typefaces <input type="checkbox"/> CK LATE Distribute to coworkers				
Sunday, 12 September	Monday, 13 September	Tuesday, 14 September	Wednesday, 15 September	Thursday, 16 September	Friday, 17 September	Saturday, 18 September
		<input type="checkbox"/> Review Ends Westriver Documentation	<input type="checkbox"/> Budget Review [2004-09-14]		<input type="checkbox"/> Task LATE Write Delta. Davidson James) <input type="checkbox"/> CK LATE Prepare chapter list <input type="checkbox"/> CK LATE Develop out. or all chapters	
Sunday, 19 September	Monday, 20 September	Tuesday, 21 September	Wednesday, 22 September	Thursday, 23 September	Friday, 24 September	Saturday, 25 September
				<input type="checkbox"/> Task DUE Write Representative Chapter(Davidson James)	<input type="checkbox"/> DOCUMENT (budget form) REQUIRED FOR (Planor James)	
Sunday, 26 September	Monday, 27 September	Tuesday, 28 September	Wednesday, 29 September	Thursday, 30 September		
		<input type="checkbox"/> KeyEvent Make Style corrections(Planor James)				

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 Westriver Documentation For 9/1/04 to 9/30/04
<input type="checkbox"/> 9/7/04 Task LATE Construct Design Template <input type="checkbox"/> 9/7/04 CK LATE Review corporate std formats <input type="checkbox"/> 9/7/04 CK LATE Prepare page definitions <input type="checkbox"/> 9/7/04 CK LATE Select typefaces <input type="checkbox"/> 9/7/04 CK LATE Distribute to coworkers <input type="checkbox"/> 9/14/04 Review Ends Westriver Documentation <input type="checkbox"/> 9/15/04 Budget Review [2004-09-14] <input type="checkbox"/> 9/17/04 Task LATE Write Detailed TOC for Westriver WR21 <input type="checkbox"/> 9/17/04 CK LATE Prepare chapter list <input type="checkbox"/> 9/17/04 CK LATE Develop outlines for all chapters <input type="checkbox"/> 9/23/04 Task DUE Write Representative Chapter <input type="checkbox"/> 9/24/04 DOCUMENT (budget form) REQUIRED FOR <input type="checkbox"/> 9/28/04 KeyEvent Make Style corrections

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.

Subscribing to a calendar

You can subscribe to a project, participant, program, or organization calendar using the iCalendar action on in the reports area of the profile document or by using the Calendar Subscription link on the News page.

You can then put the subscription URL into a iCalendar application such as Apple iCal or Mozilla Sunbird. These will periodically query the repository for updated information and allow you to combine calendars from many sources into a single presentation.

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 for a participant. The project format is shown below.

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.

Project Schedule Info

The project version of this form allows you to define periodic events. To do so you set the begin and finish dates as always, but then use the fourth column to limit the event to a particular pattern of dates such as Every Monday, or the 3rd Wednesdays.

Project Schedule Events Information Form

For: Westriver Documentation

Please update the list of important project events.
This information will be made available to other repository participants and project leaders to assist in planning and coordination.

Instructions
If the event occurs on a single day, you may enter only the start date.
Dates may be entered with or without the year. If omitted, the current year is assumed.
Previous entries which had ending dates prior to today have been removed.
Anything you enter which ends prior to Today (9/26/2004) will be ignored.

From	To	Activity	On
9/1	12/1	Staff Review	Mondays
9/1	12/1	Mtg with Pgm Mgr	3rd Wednesdays
			All Days
			All Days
			All Days
			All Days
			All Days

Select Action, then Submit: Update Schedule Information...

Submit

Exporting Participant Holidays to Microsoft Project

The Export Holidays action found on the Participant navigator and in the web Participant menu tree will create a file containing the dates of all schedule info holidays for all participants. This file is in a special xml format we call .C2K.

Using the Project Gateway toolbar in Microsoft Project, you can import this file. In so doing you transfer all the participant holiday settings in the repository into your MS Project scheduling environment so that project schedules can take these absences into account.

Observatory Holidays and Reservations

If you have a Project Observatory system, then holidays that you declare for participants will become reservations in the Observatory database.

The Observatory system has the ability to collect holidays from participant profiles in several databases and synchronize them so that the same holidays are visible in all the connected repositories.

Finally you can, in the Observatory database, define a holiday for a physical location (USA for example) and have this automatically set as a holiday on every participant associated with this location. In this instance the holiday will be placed into the repository participant profile by the Observatory.

Holidays that are not manually created in the repository are listed below the data entry area and cannot be modified by the repository user.