

Using Note and Journal

Note

In this chapter we are discussing a function called "Note" that appears as an action on most repository document forms. Please do not confuse this with "Notes," the IBM software product.

The Note action appears near the right side of the action bar when you open a document for display.

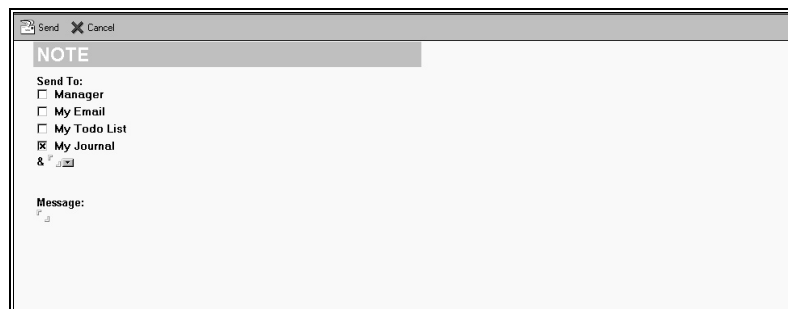
The Note function lets you easily send simple emails to the logical owners of repository documents (project managers, assignees, etc.) that contain a direct link to the document in question along with your remarks.

You can, of course, use your email client to achieve the same result, but the Note function is often more convenient for several reasons.

1. It incorporates the title of the subject document and a link (both doclink and URL) to it in the message. To do this in your email client would require some kind of cut and paste for the link as well as restating the subject.
2. It gets the mailing name from the appropriate profile document, so that you don't need to hunt it down from an address book.
3. For web users, the message is sent by the server, so you do not have to connect to your email service to get the message transferred.

Creating a Note

The Note action opens a simple message form



The screenshot shows a web-based message form titled "NOTE". At the top left, there are "Send" and "Cancel" buttons. Below the title, there is a "Send To:" section with four radio button options: "Manager", "My Email", "My Todo List", and "My Journal". The "My Journal" option is selected. Below this is a "Message:" field with a small icon to its left. The form is enclosed in a rectangular border.

In a Notes client the message form appears in a dialog box, in a web browser it appears as a simple action page.

Pressing OK or Submit, respectively, completes the process and returns you to the original document. The underlying document is not modified by the Note process, so you do not need edit rights to a document in order to send Notes about it.

Web Only Features

One or more links will appear in the lower right of the form.

"Create Event in MS Outlook" will return to you a small file in vCalendar format that can be opened by MS Outlook to create a calendar item. This item will have a date that is derived from the document from which the note is created such as the due date of an issue.

If you are a PGADMIN, the information icon followed by the word support will appear. Clicking this will generate a detailed listing of the field by field contents of the underlying document. This document is intended for Notes designers or Marin Research support.

Uses

Note is particularly convenient for managers who are reviewing the progress of others. It allows you, without leaving the context of the repository document, to send a quick reminder or a few words of praise without having to explain what you are looking at and where you found it.

Another feature of Note is that it lets you send emails to yourself about some bit of repository information. The interface is designed to make it easy to copy yourself on messages you send to others.

Note is also a part of the Journal facility.

Journal

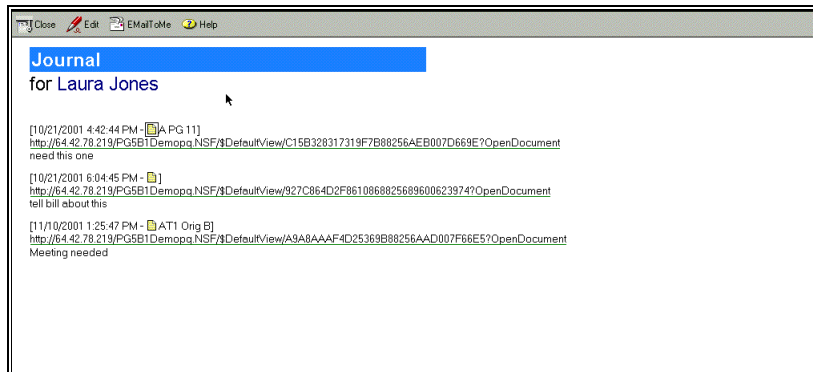
Your Journal is a personal repository document you can use to collect notes and keep reminders for yourself. Since it is part of the repository, you can access it from anywhere you are working.

Journal is a special destination for the Note function. Anytime you click *Note*, you can put your comments into your Journal in addition to or in place of emailing them. These comments will be annotated with the name and a link to the document about which you are commenting.

Using your Journal with a Notes Client.

Select the menu command "Actions OpenJournal" or Select Project Documents from the Repository Center and *My Journal* from the Project Documents Navigator.

Your Journal is a single page large page that can contain rich text (such as embedded images). When Note is used, it will add a distinctive heading before your message. The heading will contain the subject name and links.



Notes Journal

Options

This displays a dialog box with the following options which are used by the Note function when adding items to your journal.

- Do Not Timestamp** - This prevents the date and time and title of the document on which you used the Note action from being recorded.
- Do Not Include Doclink** - This prevents a Notes doclink from being created.
- Do Not Include URL** - This prevents a Web URL from being created. If you never use a browser, then check the option so that the long URL text does not appear on every note.

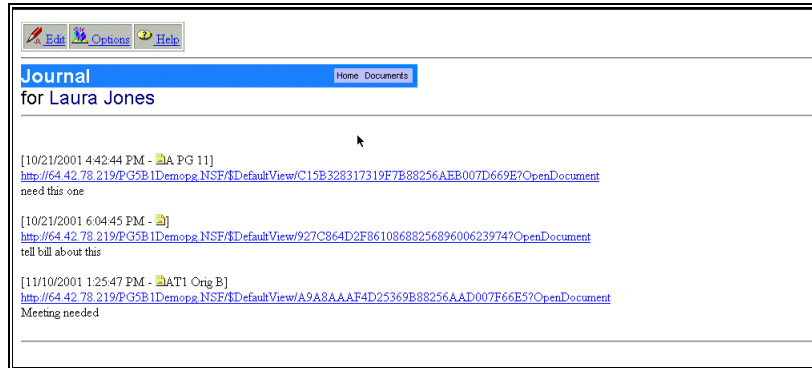
EmailToMe

This will send the content of the journal to your email address. This lets you keep older "Journals" in your personal email folder.

Using your Journal with a Web Browser

Select the action *My Journal* on the center panel of the Repository Center Home Page or from the Project Documents Navigator.

Your Journal is a single page large page containing the collection of Notes and other text you enter. When Note is used, it will add a distinctive heading before your message. The heading will contain the subject name and links.



Web Journal

Options

This displays a dialog page with the following options:

Do Not Timestamp - This prevents the date and time and title of the document on which you used the Note action from being recorded.

Do Not Include Doclink - This prevents a Notes doclink from being created. Check this if you never use a Notes client.

Do Not Include URL - This prevents a Web URL from being created. If you never use a browser, then check the option so that the long URL text does not appear on every note.

Extra Large Edit window - This causes a very large edit area to appear when you edit the journal document. This enlarged edit area is larger than the available screen in some combinations of browser and screen resolution and so may not be useful to you. But, if you have a large display, this large window making editing easier.

Edit

When you edit the journal, you are editing "plain text" This means that rich text items such as doclinks will be lost when you save the document.