

To Do

Version V3.10.30: 8 March 2012

The *To Do* tool

To Do is a powerful **iProjects** feature, originally suggested by one of the system Beta testers, that focuses and prioritizes attention on important actions.

The **To Do** box displays a list of to-do items created by, or assigned to, you. The **To Do** items are auto-sorted according to the priority, with the most urgent always on the top, second most urgent next, and so on. You will find **To Do** at the bottom of the home screen.

At the bottom of this field is a **Legend**, indicating the **Priority** for your **To Do** tasks.

Priority	Project Name	Contact Name	Text
High	Megatowers Training	Anthony Spencer	Review ToDo functions/ cross-correlate
Medium	Megatowers Training	Allan Waitzer	Follow-up on FAR guidelines
Low	Megatowers Training	Barry Gale	Check UserGuides against revised layout

Assigned To: Elina Bowron

LEGEND: ■ = Urgent ■ = High ■ = Medium ■ = Low ■ = Closed

You can view the **To Do** items for any person who is listed in the **Users** section under the **Office Admin** tab, as shown at right. Just click on the person whose **To Do** items you want to review.

Assigned To: User Tester

- Charles Nelson
- Elina Bowron
- James Moore
- Justine
- User Tester

Clicking the left-hand red arrow of any item takes you to the **Details** page for that project; from there you can click on the **ToDo** tab and see a list of all **To Do** items for that particular project, as shown below.

Priority	Date Created	Created By	Due Date	Assigned To	Key Contact	Text
High	16/12/10	James Moore				Test Project ToDo
Urgent	9/3/12	Charles Nelson	13/3/12	Charles Nelson		Revise UserGuide details
High	9/3/12	Charles Nelson	16/3/12	Charles Nelson	Steven Turner	Create extra ToDo messages for training
Medium	9/3/12	Charles Nelson	23/3/12	Charles Nelson	Barry Gale	Review Structural list for Teamwork
Low	9/3/12	Charles Nelson	30/3/12	Charles Nelson	Ron Hose	Discuss M&E list for Teamwork

The “Assigned to” field can be any person who is listed in the **Users** section under the **Office Admin** tab. Clicking on the red arrow next to any Key Contact takes you to that contact’s record in the **Contact** system.

If a **To Do** item is linked to a Note, “View Note” button will be shown on the right side of the **To Do** tab, as indicated in the sample above. Clicking on the button takes you to the linked Note.

Adding a **To Do** item to the **To Do** list:

The **To Do List** allows you to add tasks to a contact. Any items added under the **To Do** tab will be listed on the **My To Do** section on your main work area.

A **To Do** item can be created in **Contacts** (the Green Menu Bar), **To Do List** tab (see below) or in **Projects** (the Blue Menu Bar) **To Do** tab.

In **Contacts**, click on **To Do List** tab:

3032 - Architects Ring and Associates (Firm)

Created by Max on 6/09/21

Priority	Date Created	Created By	Due Date	Assigned To	Key Project	Text

Click [New](#) to add a new or another line item.

Priority	Date Created	Created By	Due Date	Assigned To	Key Project	Text
High	21/6/11	Charles Nelson	30/6/11	Charles Nelson	psmj meeting	Contact Barry to discuss setting up a Structural template

Above, the “Date created” and the “Created by” fields are auto-filled. You select Priority, Due date, Key project, and enter the To Do note in the Text field.

If I now return to my Home page, I can see that this new To Do item has been added to my list of action items, sorted by priority:

Assigned To: Charles Nelson

Priority	Project Name	Contact Name	Assign To	Text
High		S2F Pty Ltd (QLD)	Charles Nelson	
High	psmj meeting	Barry Gale	Charles Nelson	Contact Barry to discuss setting up a
Medium	Internal Test	David Sutherland	Charles Nelson	Set up review meeting with David
Medium	Megatowers Training		Charles Nelson	Test Project ToDo

Click in the note field to reveal all of its content (the text in the red oval). You can modify the To Do here. Click anywhere outside the highlighted Text to return to the previous screen.

Assigned To: Charles Nelson

Priority	Project Name	Contact Name	Assign To	Text
High		S2F Pty Ltd (QLD)	Charles Nelson	
High	psmj meeting	Barry Gale	Charles Nelson	Contact Barry to discuss setting up a Structural template
Medium	Internal Test	David Sutherland	Charles Nelson	Set up review meeting with David
Medium	Megatowers Training		Charles Nelson	Test Project ToDo

To DELETE a To Do, you must first CLOSE it – by changing its Priority to CLOSED (grey indicator). This prevents the accidental deletion of To Dos. If a project has been deleted, any To Dos related to that project will not be openable.