4.8 Projects: Map, Notes & To Do Functions

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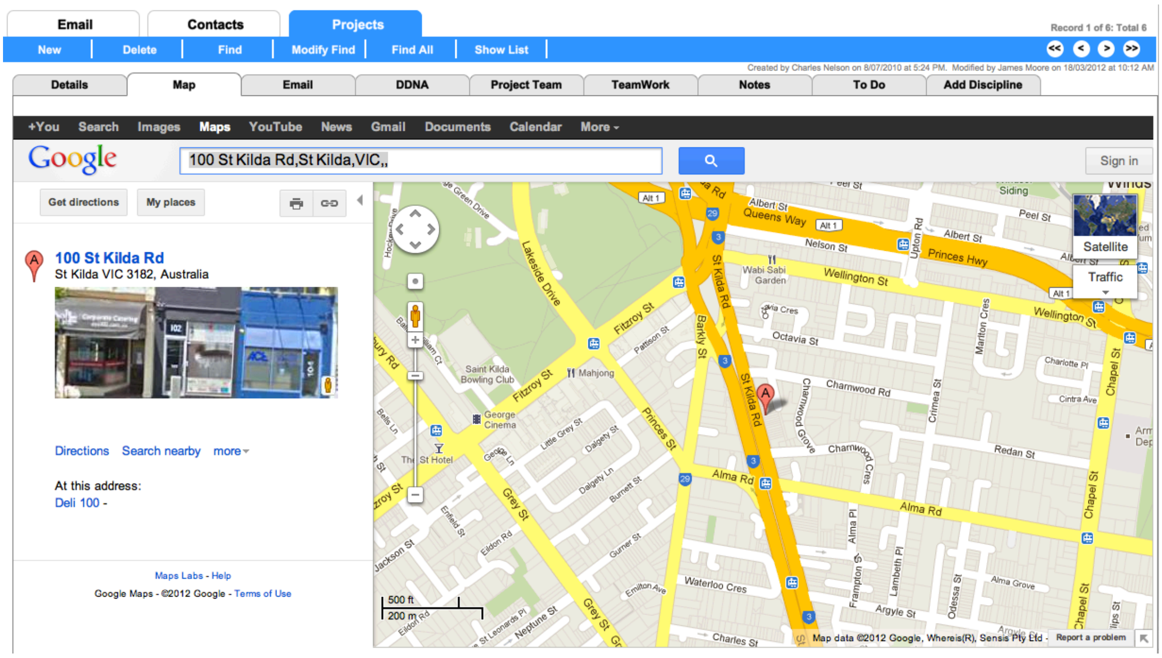
Overview

This UserGuide discusses three simple but very useful ***Projects*** tools: The ***Map, Notes*** and ***To Do*** functions.

Map

Need directions to a new project site? Just click ***Map***, print, and head on over there.

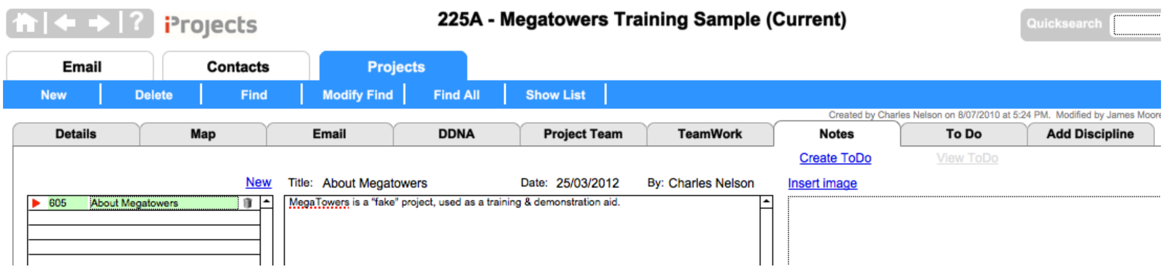
If you are running **iProjects** on your iPhone or iPad, it's even easier; your map to their location is in your hand.



If you are connected to the Internet, clicking the **Map** tab will take you straight to a Google map of the address of the project whose record you are on – provided that the project record shows a street address.

Notes

The Notes function provides for the entry of virtually unlimited information about a project that is not otherwise captured in the ***Details*** page.



Unless you have keen eyesight, this screen shot may be a little hard to read here, but it provides:

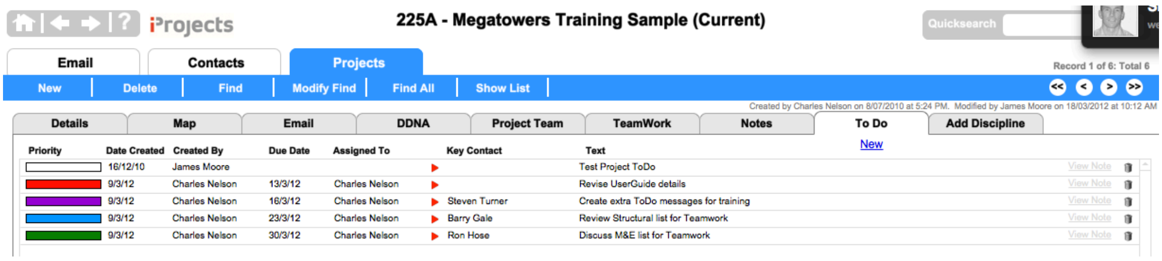
- A list (left)of all Notes assigned to the project.
- A text field (centre) that displays the title, date, and name of the person who created the Note, at the top, plus a scrollable, unlimited field where you can enter a Note of any length.
- A container field (right) where you can paste in any graphic that helps explain the note, such as a drawing or photo.

Clicking the red arrow at the left of a Note in the list displays the record for that Note. You can create unlimited numbers of notes for each project. Create a new project Note by clicking the New button at the top of the Notes list.

You can attach a ***To Do*** item to any ***Note***, by clicking the Create Note button when you are on a particular Note (see below). This brings the Note to own attention as a reminder, or to the attention of any team member, by causing it to be referenced on your, or your team member's Home page. This function provides an instant link from a brief reminder – in front of you or your colleague – to a fully detailed issue that requires attention. You can view any related ***To Do*** item by clicking the View To Do button.

The To Do List

The ***To Do*** function connects your internal team members to tasks that need doing. New project ***To Do*** items can be created by using the New button at the right edge of a list item, and can be viewed by clicking the View To Do button.



This screen shot is also not for the vision-impaired. It includes the ***To Do*** priority, date created, who created it, a date by which action is required, who the ***To Do*** is assigned to for action, the Key Contact it is assigned to (if any) and a brief text field identifying the note it relates to.

To Do priorities color-coded and are assigned by the dropdown Priority field, as shown in the legend below. See UserGuide 1.4 **To Do** for more information.

Note that two of the ***To Do*** items for this project are linked to project Notes and are assigned to Charles Nelson; the others are not (see Notes above). The graphic below shows these two project ***To Do*** items, related to the Megatowers Training project.