7

Daily Planner

The Daily Planner and Review Dates (cf. Chapter 8, “Review Dates“) form PRIMO’s work scheduling module.

The Daily Planner displays an overview of “Meeting” and “ToDo” Activities. You may enter, review, and modify your Activities, as well as those of other PRIMO users.

The Daily Planner is quickly available by clicking on the “Planner” icon on the Application Toolbar, or by selecting “Daily Planner” from the “My” menu.

Overview

The Daily Planner is comprised of "ToDo" and "Meeting" Activities. These types of Activities are not usually linked to Organisation, Property and Requirement records. Such links can be added on *page 1* of the Activity record (cf. section entitled “Working with Existing Links“, Chapter 5, “Activities“, page 5-12).

The Daily Planner lists “ToDos” and “Meetings” Activities separately. To modify a “ToDo” or “Meeting” Activity record, select it from the list and open it.

The Daily Planner consists of four sections:

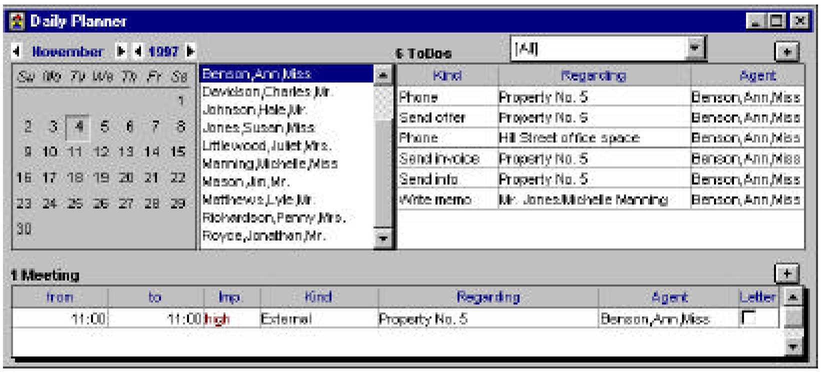

Fig. 7-1: Daily Planner

- To the above left of the Daily Planner is the calendar, with the current month and year shown at the top of the calendar and the days listed below. Dates linked to “Meeting” Activities will be in bold. Today's date is already selected (“depressed”). Whenever you select a different date, that is the date that becomes selected or depressed. For more information about PRIMO’s calendar see section entitled “Pop-up Calendar“, Chapter 1, “Basic Functions“, page 1-20.
- A list of all the PRIMO users is located next to the calendar. This is where you select whose “ToDo” and “Meeting” Activities you would like to look at. You may look at the “ToDo” and “Meeting” Activities of several users at once by holding down the Shift key and the mouse to select a group of users or Ctrl and the mouse to select several users one at a time.
- To the right of the “User” list is the “ToDo” list. Whenever a user is selected from the “User” list, all the “ToDo” Activities linked to the user will be listed here. Above the “ToDo” list is a drop down filter. The drop down filter enables you to sift through the list of “ToDo” Activities. This is particularly useful if a user has many “ToDo” Activities listed. By default, *all* “ToDo” Activities are listed unless you apply a filter. The number of “ToDos” listed is shown to the above left of the list.
- The list at the bottom of the Daily Planner shows all the meetings that are scheduled for the user selected from the “User” list and on the day specified in the calendar.

➔ **Tip:**
The following section explains how to add ToDo and Meeting activities. When adding Activities in this manner, you are able to change the Activity type. Refrain from doing this, as these Activities will not be displayed in the Daily Planner, which could cause you some confusion.

The ToDo List

The “ToDo” list shows the following “ToDo” Activity fields:

- Kind: Phone, send info, send invoice, send letter, send offer, write memo (or other kinds of activities set up by your Administrator),
- Regarding,
- Agent.

By using the "Kind" drop down filter located above the “ToDo” list, you can choose which kind of activity you wish to display. You can also sort the list by column title: one mouse-click and the list is sorted in ascending order, a second click and the list is sorted in descending order (cf. section entitled “Sorting Lists“, Chapter 6, “Lists“, page 6-13).

To review or modify a “ToDo” Activity in the list, select it and either double-click on it or press F2.

To add a new “ToDo” Activity to the “ToDo” list, proceed as follows:

✓ **Prerequisite:**
You have opened the Daily Planner.

1. Click on the “**+**” icon located to the above right of the “ToDo” list.

   A new “ToDo” Activity record will open:

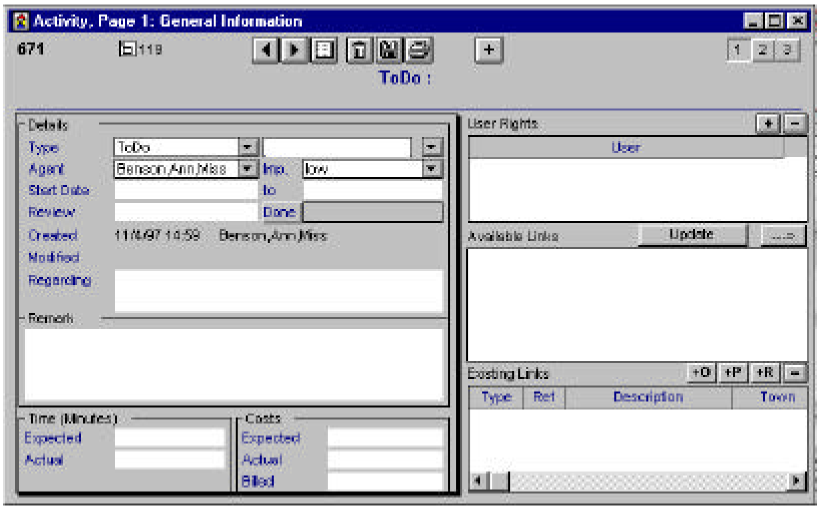

Fig. 7-2: “ToDo” Activity Record

"ToDo" is already selected as the "Type" of Activity you are creating. Your name has already been entered as the user who created the record and also as the Agent (even if you were looking at someone else's "ToDo" list when you created this record). The "Importance" selected is "low".

2. If you are creating this record for another PRIMO user, then select their name from the "Agent" drop down list.
3. Fill in the remainder of the fields as necessary (cf. section entitled "Creating a New Activity Record", Chapter 5, "Activities", page 5-8). You should make sure that the "Kind" and "Regarding" fields are properly filled in, since besides the "Type" field, these are the fields that appear in the Daily Planner "ToDo" list.
4. Close the Activity record.

   The record is saved automatically and the new "ToDo" Activity appears in the Daily Planner "ToDo" list.

To change the status of a completed "ToDo" Activity, proceed as follows:

1. Select the appropriate Activity record from the "ToDo" list and open it.
2. Update the "ToDo" Activity record, if necessary.
3. Click on the "Done" button located in the centre of the "Details" box.

   The current date and time are automatically entered in the greyed-out field next to the "Done" button. This entry cannot be changed manually.

   A check-mark will appear at the top right of the "Details" box to show that this "ToDo" Activity is now "Done".
4. Save and close the Activity record.

   The record disappears from the "ToDo" list.

⚠ **Important:**
You should not delete Activity records, but instead mark them "Done" as explained above, as you may want to search for and review them at a later date. Before deleting records you should read section entitled "Changing Record Status Instead of Deleting", Chapter 1, "Basic Functions", page 1-38.

The Meeting List

The "Meeting" list shows the following Activity record fields:

- from (start time),
- to (end time),
- Importance (Imp.): low, average (veg.), high,
- Kind: At client, External, Here with client, Internal, Other, Private, Solicitor,
- Regarding,

- Agent,
- Letter: the check-box is checked if a letter is attached to the Activity record.

To review or modify a “Meeting” Activity record, select it from the “Meeting” list and double-click on it or press F2 to open it.

To add a new “Meeting” Activity record to the “Meeting” list, proceed as follows:

✓ **Prerequisite:**
You have opened the Daily Planner and selected the day of the meeting from the calendar.

1. Click on the “**+**” icon located to the above right of the “Meeting” list.

   A new “Meeting” Activity record will open:

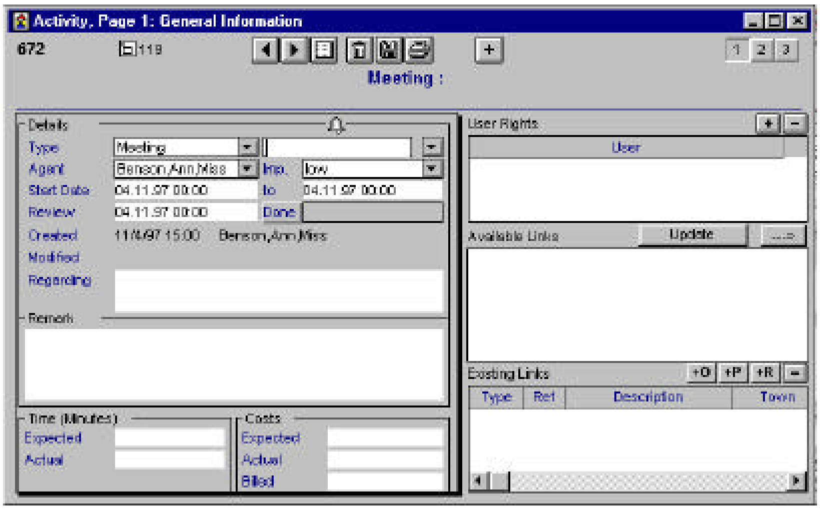

Fig. 7-3: “Meeting” Activity Record

   "Meeting" is already selected as the "Type" of activity you are creating. Your name has already been entered as the user who created the record and also as the Agent (even if you were looking at someone else's “Meeting” list when you created this record). The date you selected from the calendar has been entered in the “Start Date” and “to” fields, as well as in the “Review Date” field. The "Importance" selected is "low”.

   At the top right of the "Details" box is an alarm bell, warning you of the future meeting and review date.

2. If you are creating this record for another PRIMO user, then select their name from the “Agent” drop down list.
3. Complete the rest of the fields as necessary (cf. section entitled “Creating a New Activity Record“, Chapter 5, “Activities“, page 5-8). Remember that the "Agent", "from", "to", "Kind", "Importance" and "Regarding" fields appear on the Meeting list, so you should fill them in as accurately as possible.

Close the record.

The record is saved automatically and the new “Meeting” Activity is listed in the “Meeting” list.

To change the status of a completed “Meeting” Activity (cf. section entitled “Marking an Activity Record “Done”“, Chapter 5, “Activities“, page 5-17), proceed as follows:

1. Select the appropriate Activity record from the “Meeting” list and open it.
2. Update the “Meeting” Activity record, if necessary.
3. Click on the “Done” button located in the centre of the “Details” box.

   A dialogue box will open asking if you wish to erase the Review Date.
4. Click on “Yes”.

   The Review Date is erased and the alarm bell is cancelled. The current date and time are automatically entered in the greyed-out field next to the “Done” button. This entry cannot be changed manually.

   A check-mark will appear at the top right of the “Details” box to show that this “Meeting” Activity is now “Done”.
5. Save and close the Activity record.

   The “Meeting” Activity does *NOT* disappear from the Meeting list.

⚠ **Important:**
You should not delete Activity records, but instead mark them “Done” as explained above, as you may want to search for and review them at a later date. Before deleting records you should read section entitled “Changing Record Status Instead of Deleting“, Chapter 1, “Basic Functions“, page 1-38.