

# 8



## Review Dates

Review Dates and the Daily Planner (cf. [Chapter 7, "Daily Planner"](#)) form PRIMO's work scheduling module.

Using Review Dates, you can track on-going tasks by setting reminder dates for records you would like to review.

Review dates can be entered on the first page of all the major records:

- Organisations,
- Properties,
- Requirements,
- Activities.

## Overview

The “Review Date” field appears on the first page of every major record (Organisation, Property, Requirement and Activity).

Entering a date in the “Review Date” field will place the record under review for the PRIMO user listed in the “Agent” field.

You can review records with a review date:

- when you log into PRIMO, as long as the Program Administrator has activated this option when assigning your user rights (cf. [section entitled “Viewing Review Dates at Start-Up”, Chapter 15, “Administration”, page 15-27](#)).
- when you select a “needing review” command from the My menu.

## Adding and Deleting Review Dates

### Adding Review Dates

You can give any of the major records a review date. A review date is a date in the future when you would like to revisit the record. To do this, enter the appropriate date in the “Review Date” field. You may do this manually or by using the calendar.

The person selected as the “Agent” will be notified that the record needs reviewing when that date arrives. The “Agent” will continue to be reminded to review the record until the review date is deleted or modified.



**Important:**

Additional people can be made aware of the review date by giving them access to the record through an Activity record.

In some instances (e.g. in the case of Offer History-Activities), PRIMO will ask you if you wish to enter a review date.

### Deleting Review Dates

Once the record has been reviewed, “turn off” the reminder option by deleting the date from the “Review Date” field. If the review date was part of an Activity record, to get rid of it you must click on the “Done” button located on the “General Information” page of the Activity Record.

### Viewing Review Dates

When viewing Review Dates you will notice that they are listed in *Search and List windows* specific to the type of record you are reviewing. Any listed record can be opened and modified. If there are no review dates for a certain type of record the following message will appear on the screen:



**Fig. 8-1:** Message: “No records found”

PRIMO offers several ways of viewing Review Dates:

## Viewing Review Dates at Start-Up

The quickest and easiest way to review records is to have the records needing review listed when you first log into PRIMO. This option is activated by the Program Administrator and may not be accessible to all users (cf. [section entitled “Viewing Review Dates at Start-Up”, Chapter 15, “Administration”, page 15-27](#)).

✓ **Prerequisite:**

You have not yet started PRIMO.

1. Start PRIMO by double-clicking on the PRIMO icon and enter your User Name and Password.

The following dialogue box will open:



**Fig. 8-2:** Dialogue Box: “List all records needing review?”

2. Click on “Yes” if you would like to view all the records needing review.  
*A Search and List window for each type of record (Organisation, Property, Requirement and Activity) will open one at a time, listing all the records needing review. If there are no records to review, then you will get the “No records found” message described in Fig. 8-1. Click on "OK" to close the message box along with the empty Search and List window.*
3. To avoid reviewing records at the start of PRIMO click on “No”. You may review the records when you next start PRIMO or by going to the My menu (see below).

## Using the My Menu to Review Records

The My menu lets you view all your records needing review.

*Example A:*

If you would like to review records of a certain type only, you may select that type of record from the My menu:

- “Requirements needing review”,
- “Organisations needing review”,
- “Properties needing review”,
- “Activities needing review”.

The appropriate *Search and List window* will open and list the records needing review.

*Example B (excludes Activities):*

If you would like to review more than one type of record, select “Organisation, Properties, Requirements needing review” from the My menu.

The *Search and List windows* for all three record types will open and list the records needing review (if any).

## Searching for Review Dates

*Search and List windows* allow you to combine searches. That is, you can search for records needing review as well as other information:

*Example A:*

If you wish to search for records with review dates (all review dates, regardless of their due date), proceed as follows:

✓ **Prerequisite:**

You have opened the appropriate *Search and List window*.

1. Select “Review Date” from the Search Field column.
2. Select “is not empty” from the Operator column (this will bring up all records containing a review date, regardless of the date).
3. Enter additional search criteria in the next rows, if necessary.
4. Start the search.

PRIMO will search for all records containing the review dates and other search criteria you entered. Furthermore, future review dates will also be listed if they fit the search criteria.

*Example B:*

If you wish to search for records containing specific review dates, proceed as follows:

✓ **Prerequisite:**

You have opened the appropriate *Search and List window*.

1. Select "Review Date" from the Search Field column.
2. Select "from" or "after" from the Operator column. Which operator you choose depends on whether you wish to include the day you are using as your starting point in the search.
3. Enter the starting point date in the Value column.
4. Go to the next row of search fields and select "Review Date" once again from the Search Field column.
5. Select "until" or "before" from the Operator column. Which operator you choose depends on whether you wish to include the day you are using as your end date in the search.
6. Enter an end date in the Value column.
7. Enter additional search criteria in the next rows, if necessary.
8. Start the search.  
PRIMO will search for all records containing the review dates and other search criteria you entered.

You can also make use of the Operator column to search for all records that do not contain review dates. To do this select "Review Date" from the Search Field column and "is empty" from the Operator column.