

Notes & To – Do’s:

Creating, managing and using Notes & To-Do’s.

Purpose: Manage details of projects by keeping notes or adding to-do’s to projects, tasks or people.

Perspectives: “Manage Projects & Tasks”

In this tutorial:

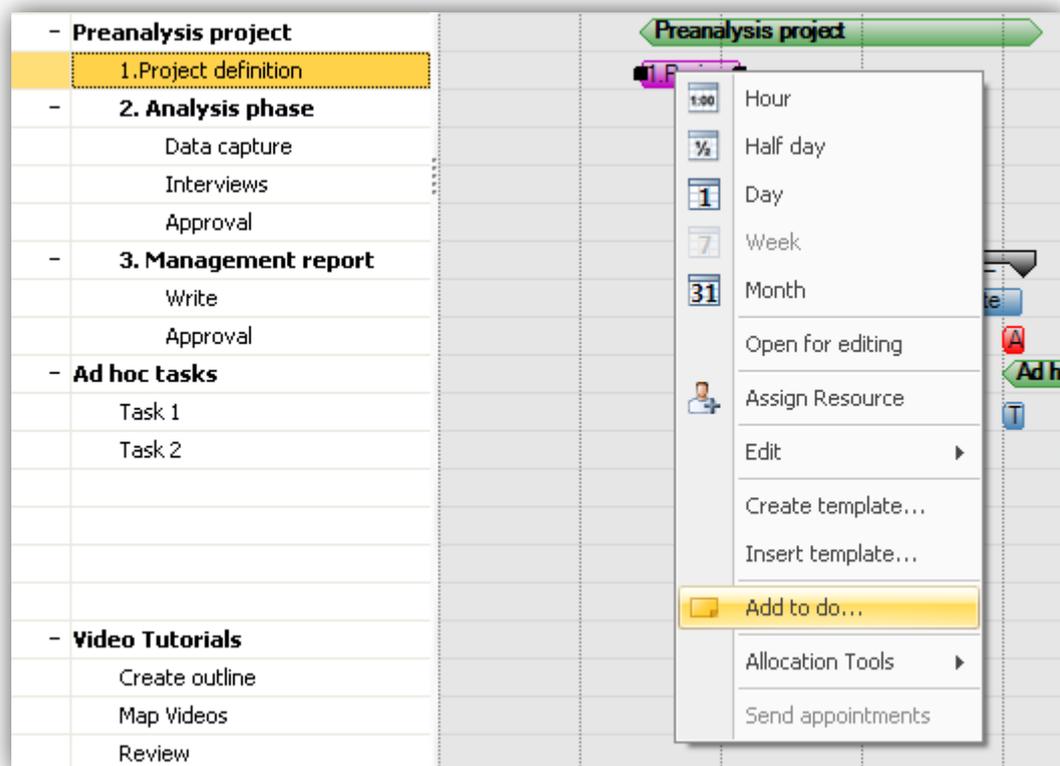
1.1 Create a new to-do

1.2 Create a new note

1.3 Attachments

1.1 Create a new to-do:

Select a task in the Gantt chart and right click on it. Choose “Add to-do” near the bottom of the drop down menu.



Fill in the dialog (shown below) and press “Add and Close”

Add To Do

Name: Define Milestones for Project

Description: Meet with David and discuss milestones, plan project outline.

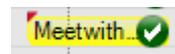
Start: 05/11/2009 12:00 AM Finish: 10/11/2009 12:00 AM

Status: [Empty]

Priority: [Empty]

Buttons: Add and Close, Close

You can see a small red triangle appear at the top of the task in the Gantt chart.

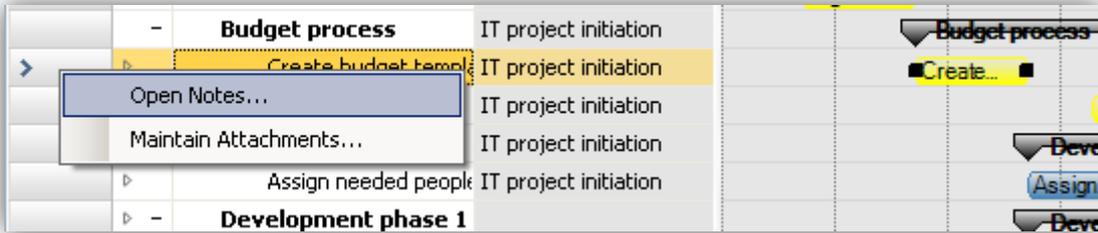


Pressing the red triangle will bring up a window showing the details of your to-do. In the below screenshot we select the red triangle to show the details of the to-do we just made for “Project Definition”. Clicking anywhere on the Gantt chart will close the window again.

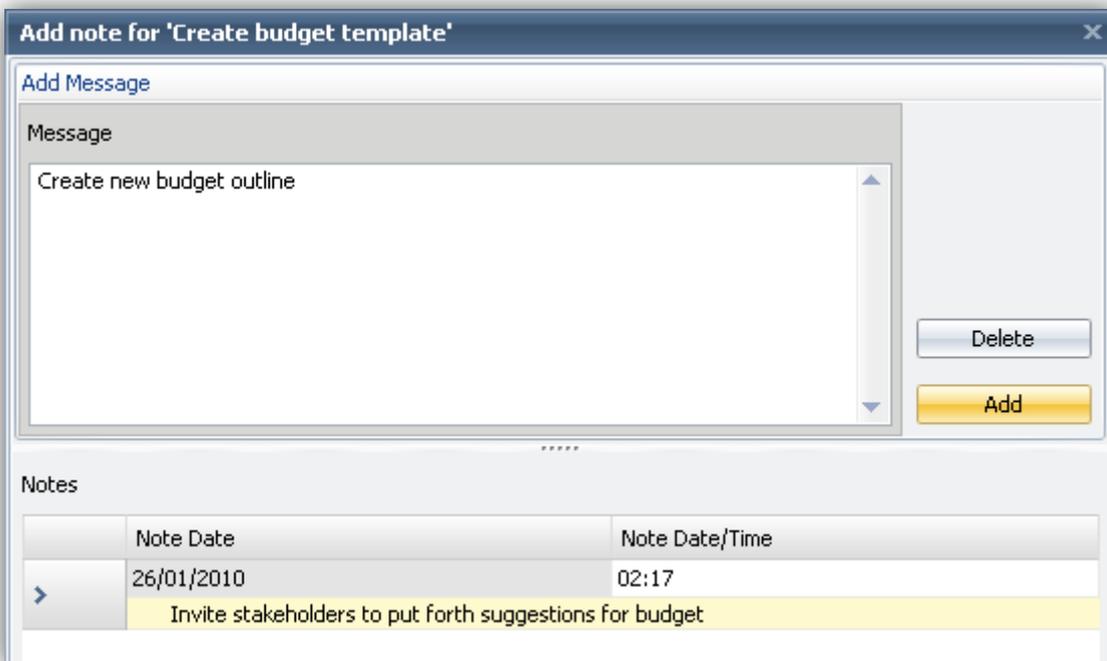
Comple	Name	Descripti	Start	Finish	Stat	Prior
<input type="checkbox"/>	Define Project Milestones	Project Milesto	07/11/2009 12:00 AM	14/11/2009 12:00 AM		

1.2 Create a new note:

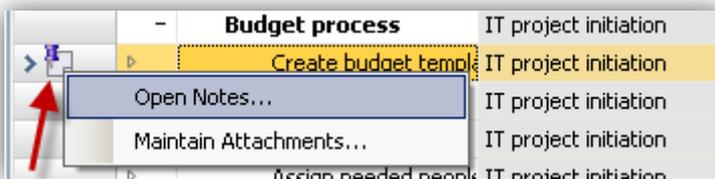
To create a note, right click in the grey area beside the task list and choose “Open Notes”.



A dialog will pop up. Add a note and click the button “Add”



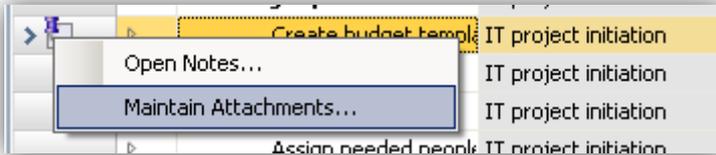
You can continue to add to this note by right clicking on the new note icon and selecting “Open Notes”.



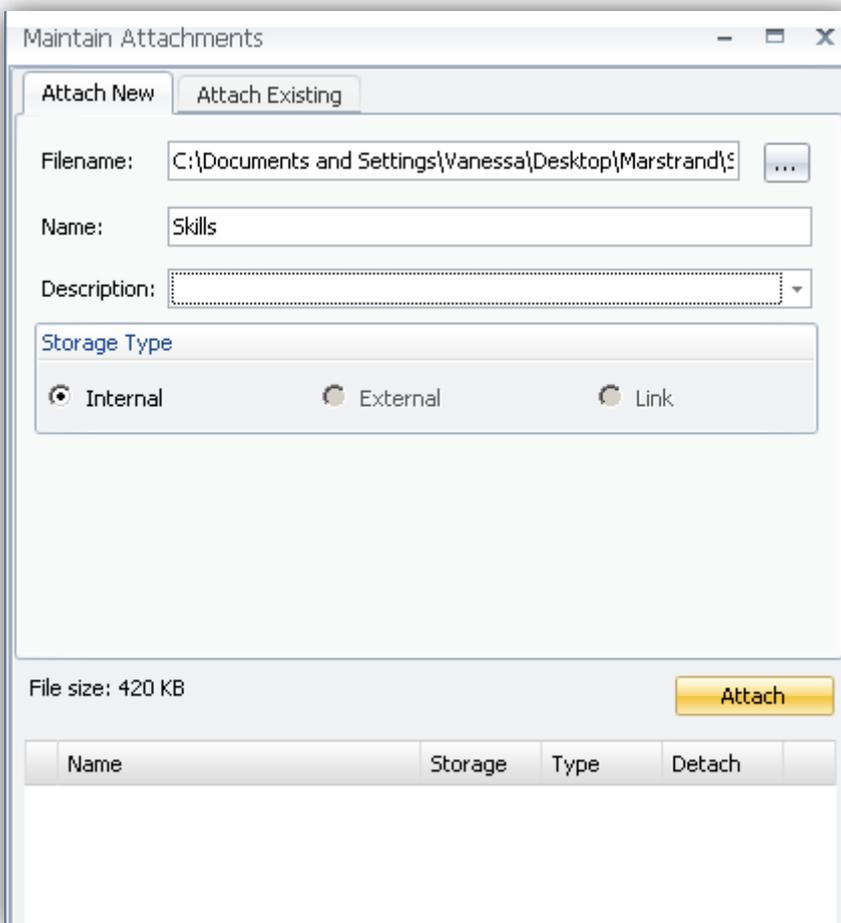
1.3 Attachments:

You can add an attachment to any project. This can be a file stored on your computer or in the database.

Again, right click on the note icon and select “Maintain Attachments”



A dialog will open allowing you to choose a file from your computer and attach it.

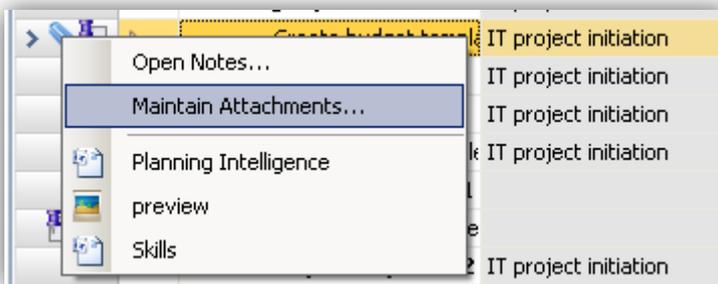


You can choose to attach it as “Internal” (file is stored in the database), “External” (file is stored on your computer), or as a “Link” (file is stored online or some other place with a link to access it).

As you attach more files, a list will be formed of all the attachments you have.

Attach				
Name	Storage	Type	Detach	
> Planning Intelligence	Internal			
preview	Internal			
Skills	Internal			

Attachments to tasks are indicated by a paperclip icon beside the note icon in the grey area; you can also see which attachments are available.



For more tutorials, visit our online Learning Center at http://marstrandinnovation.com/downloads/knowledge/learning_center/ where you can read step-by-step tutorial PDFs or watch MPI in action through our videos.