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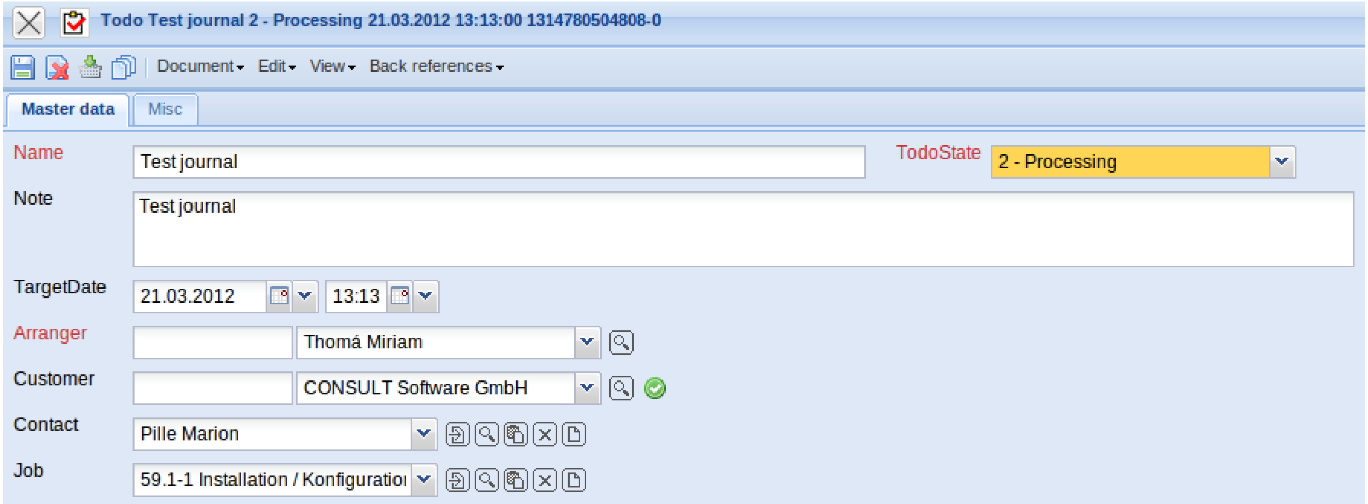
2.01.30 To-Do

The **To-Do** form administers the general or assigned tasks throughout the system. The assigned tasks are assigned to either Customer, Contacts and/or to Jobs. The to-do form consists of information about the processing status, date, employee, contact information and the assigned jobs. The to-do's are predominantly assigned to jobs and can be used as check lists.

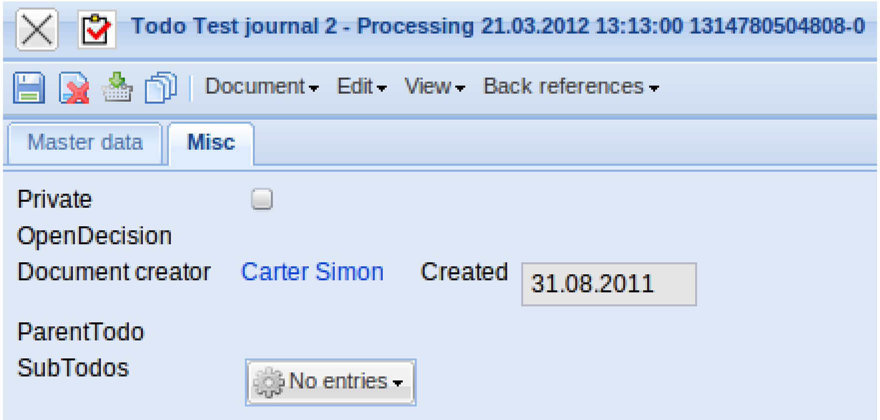
Tip: For more on this subject see chapter 3.11.10 To-Do Administration.



The form consists of the following elements:

On the “Main Data” tab:

- **Name:** The short description for a task can be entered here.
- **Status:** This field specifies the process status of the task. In the standard version the entries Entered(erfasst), In Process, Completed and Quitted are available.
- **Description:** A detailed description of the task can be entered in this field. Dieses Feld ermöglicht die Eingabe
- **Target Date:** A due date for the to-do (when to be completed) can be entered in this field.
- **Arranger:** A task can be assigned to the responsible employee. If a to-do is created in the job, the employee responsible for the job is preallocated. The employee is defined in Employee.
- **Customer:** This field refers to the ordering customer of the project. If a to-do is created in the job, the customer of the assigned project is preallocated here. The customers are administered in Contacts.
- **Contacts:** This field key figures the contact person and is pre set automatically, if a to-do has been created in the job. The contact persons are administered in Contacts.
- **Job:** In this field allows to link the to-do's to the Jobs. When creating a to-do from the job, this field is preallocated.



Onthe “Misc” tab:

- **Private:** This flag can be used for private to-do's.
- **Issue, Open Decision, Meetings and Protocol Entry:** These fields are part of the add-on module KompPlex and allow linking between issues and protocols to to-do.
- **Document Creator, Date Created:** The user and the creation date are entered from the system here.
- **Parent To-Do's:** Each to-do can be divided into an unlimited amount of to-do's and this field contains all superordinate to-do's.
- **Subordinate To-Do's:** This field contains all subordinate to-do tasks, if the to-do's have been divided.

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