To-Do Lists User Guide

Creating and managing To-Do Lists for you and your staff

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Overview

The To-Do List allows you create and manage a list of To-Dos for you and your staff. After a To-Do List is created, To-Dos can be self-assigned or assigned to employees, vendors, or external users. As To-Dos are completed, assignees can update their status and provide all users with visibility into their progress.

This section describes the process of creating, managing, and sharing To-Do Lists.

Creating a To Do List

To Do Lists can be created to provide a simple self-reminder or manage a list of action items for multiple individuals. This section describes the process of creating a To-Do List.

To create a To-Do List:

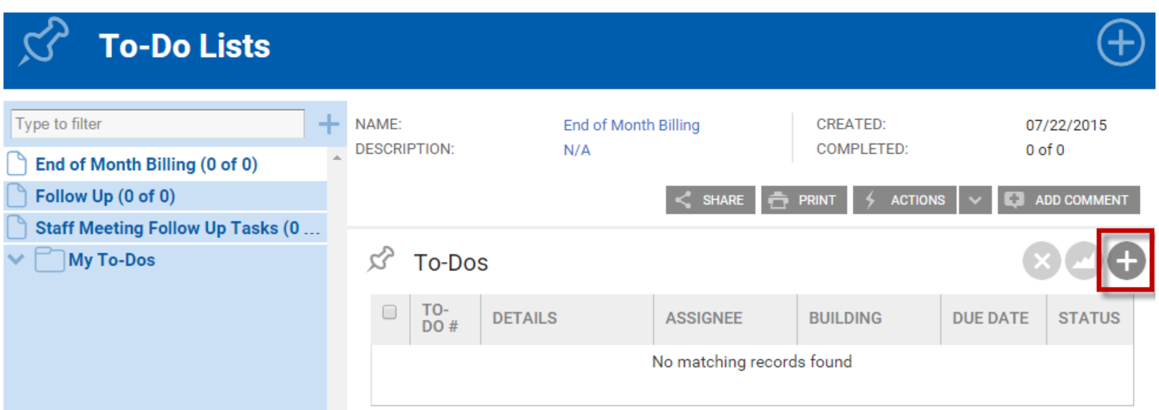
1. Click **Go To → Tasks → To-Do Lists**.
2. Click .
3. Provide a **NAME** and an optional **DESCRIPTION** of the To-Do List.
4. Click **SAVE**.

Creating a To-Do

After the To-Do List has been created you can create and assign individual To-Dos for yourself or others. This sections describes how to create a To-Do, or action item.

To create a To-Do for your To-Do List:

1. Click **Go To → Tasks → To-Do Lists.**
2. Select a To Do List from the left side.
3. Click the **(+) New To-Do** icon.



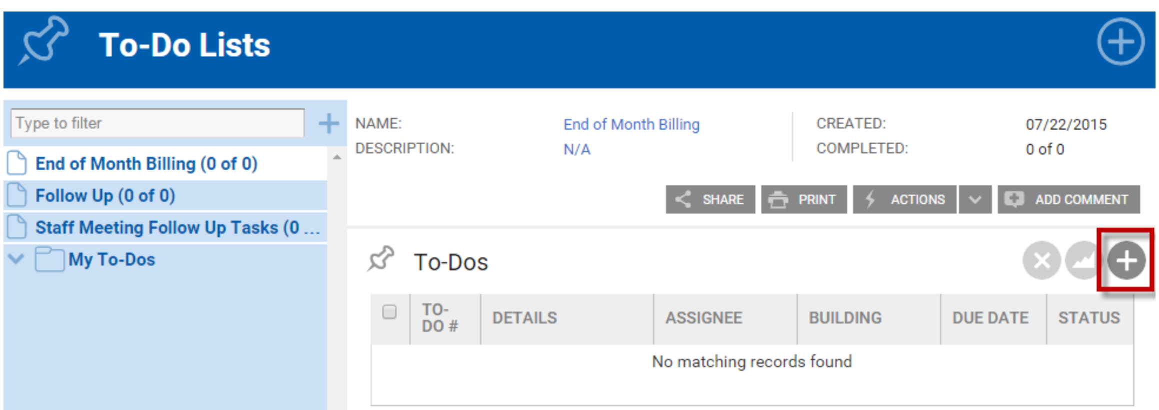
4. Select a **BUILDING** and **ASSIGNEE**.
5. Enter the **DETAILS** of the To-Do.
6. (Optional) Use the calendar icon to enter a **DUE DATE**.
7. (Optional) Click **Notify via email** to send an email notification to the To-Do assignee.
8. Click **SAVE** or **SAVE AND ADD ANOTHER** to create another To-Do.

Creating a To Do for a Non-System User

To Dos can be assigned to individuals outside the Building Engines application. When a To-Do for a non-system user is created an alert can be configured to notify the assignee. After the To-Do is completed, the non-system user can respond to the email notification and let the list owner know that the To-Do can be marked as complete. This section describes the process of creating an action item for a non-system user.

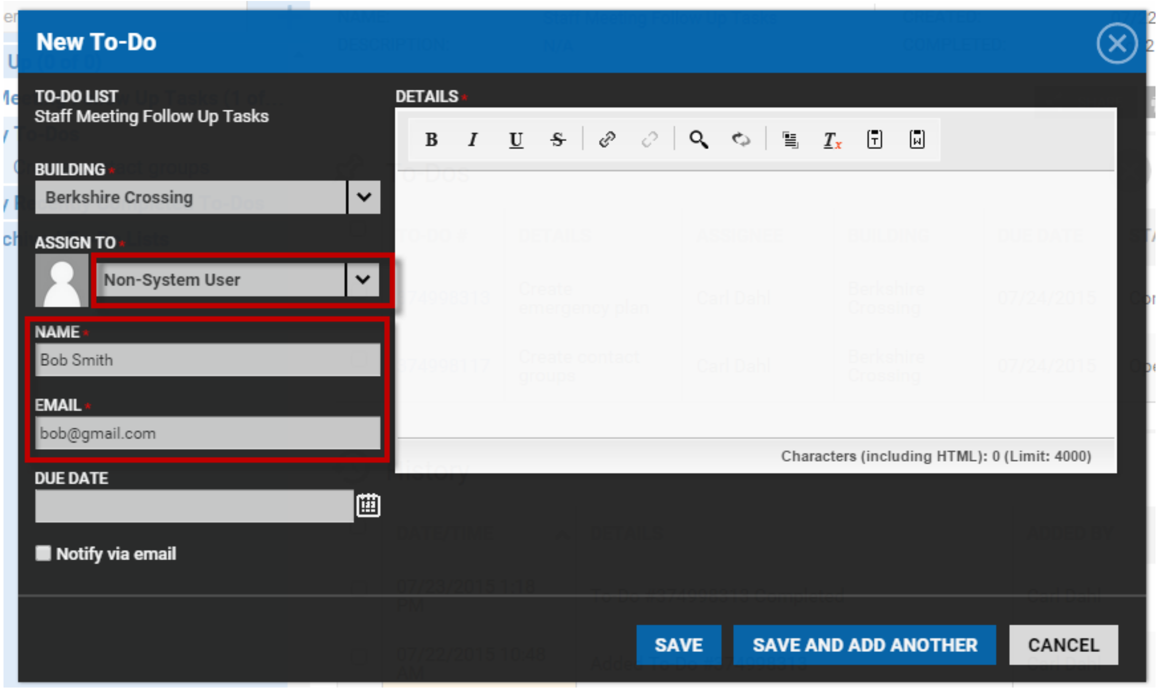
To create an action item for a non-system user:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Click the **(+) New To-Do** icon.



4. Select a **BUILDING** and enter the To-Do **DETAILS**.

5. Using the **ASSIGN TO** field, select **Non-System User**, and then enter the assignee's **NAME** and **EMAIL** address.



6. (Optional) Use the calendar icon to enter a **DUE DATE**.
7. (Optional) Click **Notify via email** to send an email notification to the action item assignee.
8. Click **SAVE** or **SAVE AND ADD ANOTHER** to create another action item.

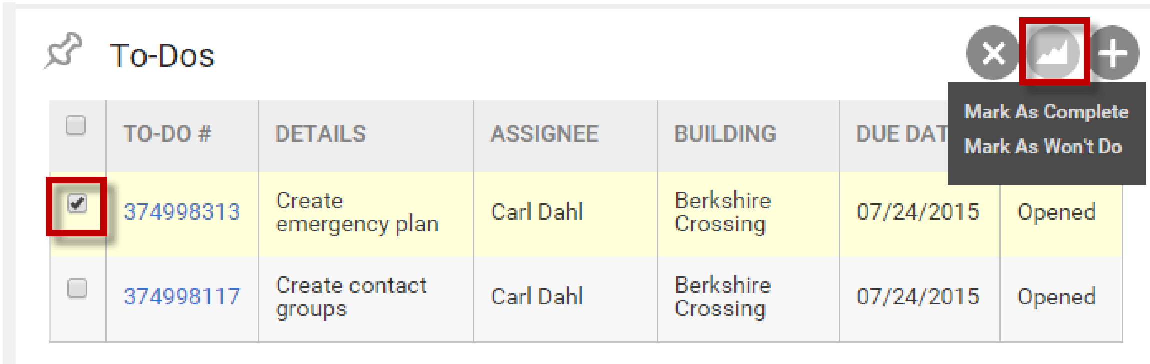
Completing a To-Do

After a To-Do has been completed you can update the To-Do to display as completed. This section describes the process of completing a To-Do.

To complete a To-Do:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.

3. Check the box located next to the completed To-Do, click the icon, and select **Mark As Complete**.



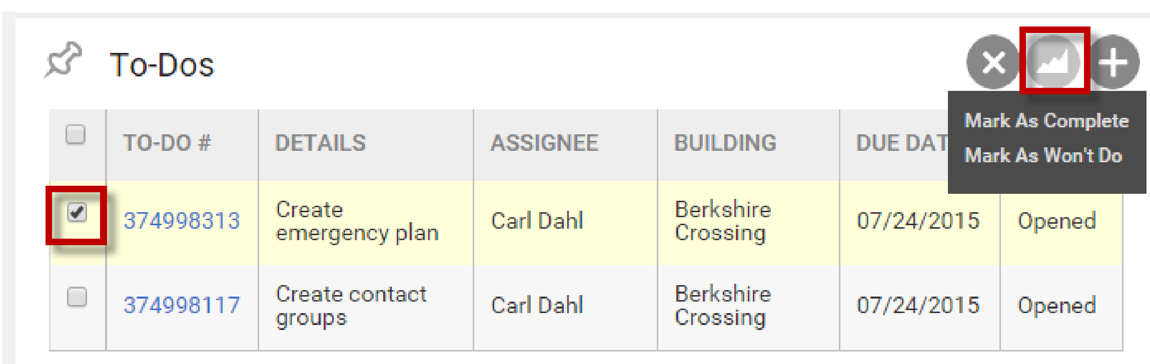
4. Confirm by clicking **YES**.

Marking a To-Do as Won't Do

If you choose not to complete a particular To-Do, however, want it to remain on your To-Do List you can mark the To-Do as Won't Do. This section describes the process of marking a To-Do as Won't Do.

To mark a To-Do as Won't Do:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Check the box located next to the To-Do you are not going to do, click the icon, and select **Mark As Won't Do**.



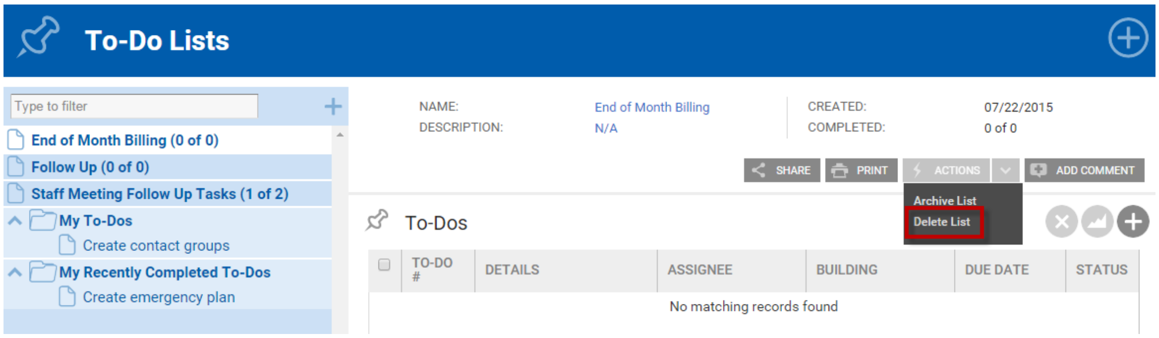
4. Confirm by clicking **YES**.

Deleting a To-Do List

This section describes the process of deleting a To-Do List.

To delete a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select the To-Do List you want to delete.
3. Click **ACTIONS**, and select **Delete List**.

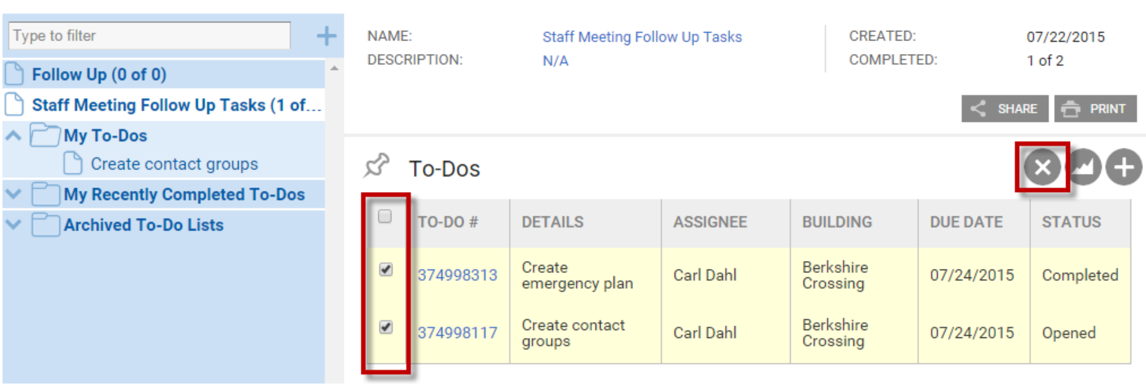


Deleting a To-Do

This section describes the process of deleting a To-Do from a To-Do List.

To delete a To-Do:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Check the box located next to the To-Do(s) you want to delete, and click the icon.



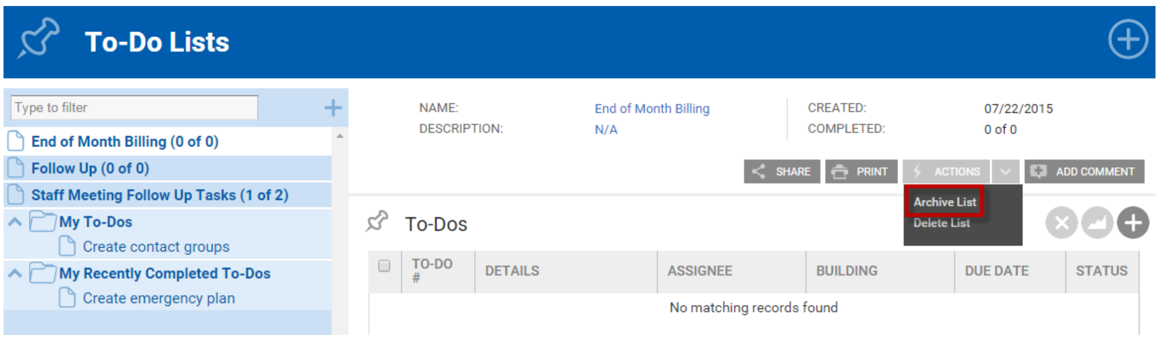
4. Confirm by clicking **YES**.

Archiving a To-Do List

After all of the To-Dos on your list have been completed you can archive the To-Do List into the Archive To-Do Lists folder. This section describes the process of archiving a To-Do List.

To archive a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select the To-Do List you want to archive.
3. Click **ACTIONS** and select **Archive List**.



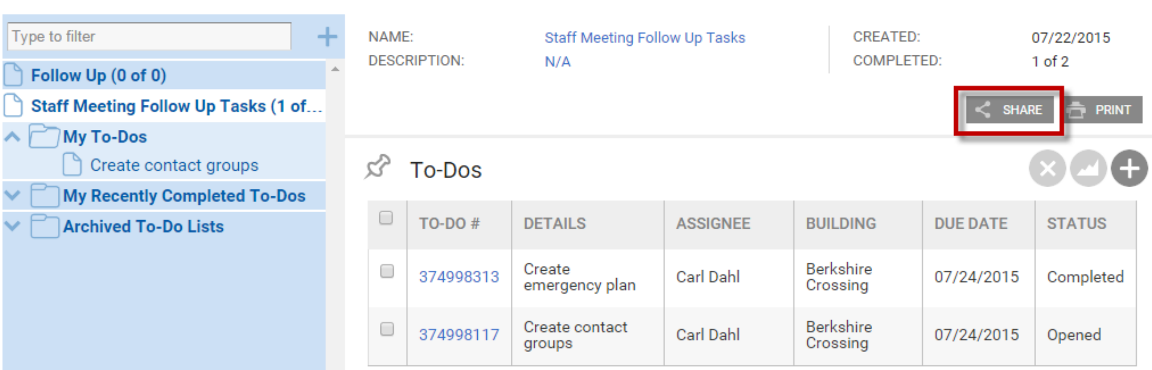
4. Click **YES** to confirm.

Sharing a To-Do List

To-Do Lists can be shared with system users and non-system users. The PDF To-Do List attachment includes all of the individual To-Dos, current status, and their due dates. This section describes how to share a To-Do List.

To share a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Click the To-Do List you want to share.
3. Click **SHARE**.



4. (Optional) The **SUBJECT**, **MESSAGE**, and **SENDER ALIAS** fields can be edited by clicking within the field and entering custom information.
5. Use the recipient builder to select your recipients.
6. Click **SEND**.

Printing a To-Do List

This section describes the process of printing a To-Do List.

To print a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Click the To-Do List you want to print.
3. Click **PRINT**.