



COINS OA Enhancement:

Project Management Task Lists

Document Ref:	OA_CE-PM018 (PDR 23175)
Date:	May-30-2014
Document Version:	1.0
Modules Affected:	Project Management
Earliest available version of COINS:	COINS OA 11.01
Documentation Updated:	This document may contain information that is not incorporated into the documentation, such as procedures and sample reports, so you may want to keep a copy for future use. An archive of CE documents is available on the COINS web site Client Area.

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1 Overview

This document describes functional and usability enhancements to the Task Lists functionality in the Project Management module.

NOTE:

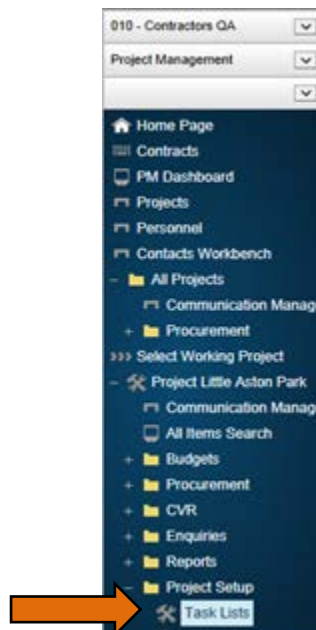
General changes that are applicable to all functions in the Communication Workbench are found in the **OA_CE-PM007_PMGenCommMgtChgs.pdf** document.

2 Screen and Processing Changes

2.1 Task Lists Menu Item

Task Lists has been removed from the **Project Management > [selected project] Project Setup** menu (shown in Figure 1 below before it was removed). It has been moved to the Selected Project Communication Workbench, which is discussed in more detail in Section 2.2.1.

Figure 1: Previous Menu



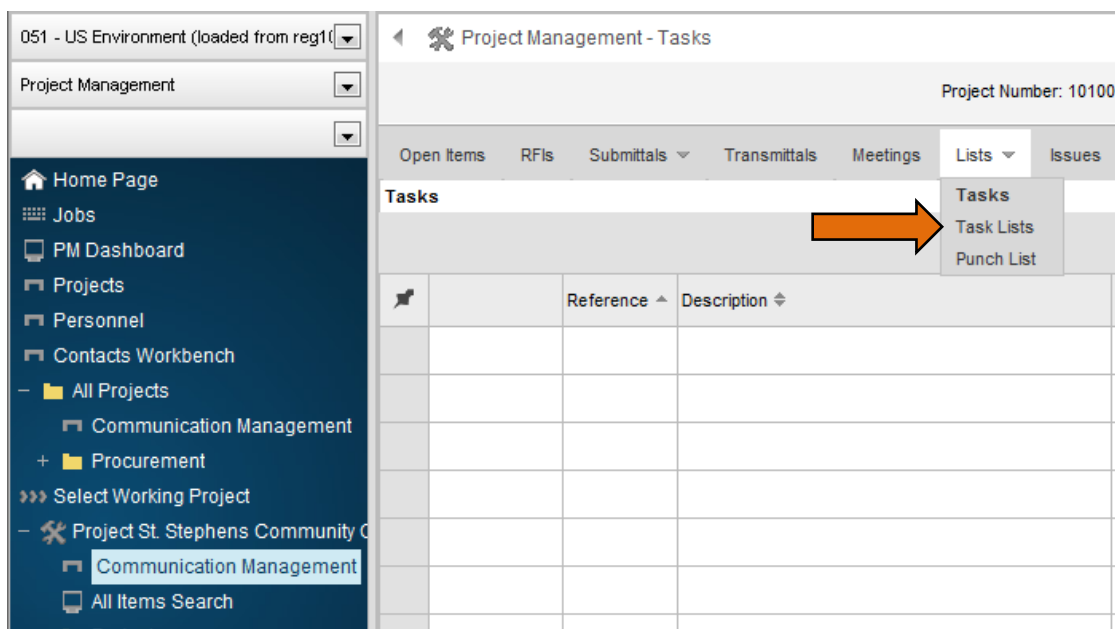


2.2 Selected Project Browse Screen

2.2.1 Task Lists Option

Task Lists is now located as an option on the Selected Project Communication Workbench under the Lists tab, as shown in Figure 2. It is **not** available on the All Projects Communication Workbench.

Figure 2: Selected Project Lists Tab Options





2.2.2 Task Lists Browse Screen

All, **Closed**, and **Open** columns are now available on the Task Lists browse screen by selecting the **All fields** column set (Figure 3). These columns show how many tasks are in the task list by status (open, closed, all).

Figure 3: Task Lists Browse Screen

Project Management - Task Lists

Kathi Reynolds

Project Number: 10100 Name: St. Stephens Community College (0000728) (C. Contract) Options

Open Items RFIs Submittals Transmittals Meetings Lists Issues Daily Reports Communication Files Dashboard

Task Lists

Task List	Description	Prefix	Recurring	Interval	Task List Template	Start Date	End Date	Next Due Date	Assign To	All	Closed	Open
Task 0001	Sample Task List		<input type="checkbox"/>	-						3	0	3
Task 1000	Task List Test	{project}	<input type="checkbox"/>	-						4	0	4

Filter: All Search: Task List

2.2.3 Recurring Task Lists

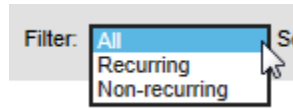
Recurring Task List functionality has been added to Task Lists to allow for monthly checklists, weekly checklists, etc. To accommodate recurring tasks, the following fields have been added to the Task Lists screen (see Figure 4):

- Recurring
- Interval
- Task List Template
- Start Date and End Date
- Next Due Date
- Assign To



Filters have also been updated to allow for recurring tasks, as follows:

- **Filter** now includes All, Recurring, and Non-recurring options.



- **Search** now includes Task List, Description, Task List Template, and Next Due Date options.

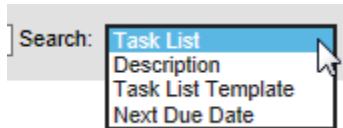


Figure 4: Recurring Tasks Fields

Project Management - Task Lists Kathi Reynolds

Project Number: 10100 Name: St. Stephens Community College (0000728) (C. Contract) Options

Open Items RFIs Submittals Transmittals Meetings **Lists** Issues Daily Reports Communication Files Dashboard

Task Lists Standard Columns

Task List				Recurring						
	Task List	Description	Prefix	Recurring	Interval	Task List Template	Start Date	End Date	Next Due Date	Assign To
<input type="checkbox"/>	Task 0001	Sample Task List		<input type="checkbox"/>	-					
<input type="checkbox"/>	Task 1000	Task List Test	{project}	<input type="checkbox"/>	-					

Navigation: Bulk: ☐ Populate from Template

Filter: All Search: Task List



Field Definitions

Recurring

If this field is not checked, the following fields are disabled: **Interval**, **Start** and **End Dates**, **Next Due Date**, and **Assign To**. If this is checked, the following fields must be filled in:

- Interval
- Task List Template
- End Date

Task List Template

The template to use for this task list.

Interval

How often the task list should recur: **Day**, **Week**, **Two Weeks**, **Month**, **Quarter**, or **Year**.

Start Date

End Date

The starting and ending dates of the task list.

- If no **Start Date** is entered, today's date is assigned upon saving.

Next Due Date

The date that the task list is due.

- If no **Next Due Date** is entered, the start date is used upon saving.

Assign To

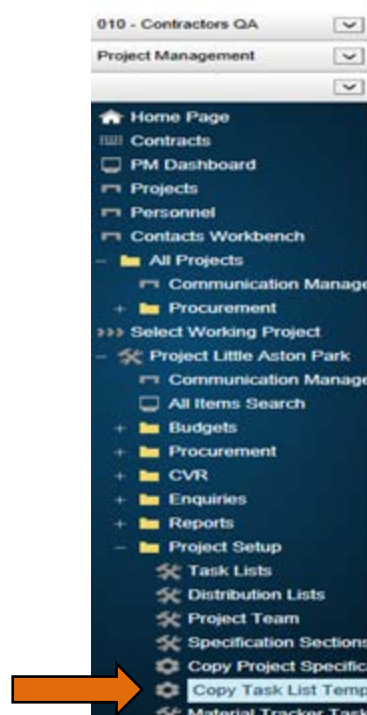
If the **Recurring** field is checked, this field is enabled and can be used to enter the name of the person receiving the task list.



2.2.4 Copy Task Lists Templates Menu Item

Copy Task List Templates has been removed from the Project Management > Project Setup menu (Figure 5). It has been moved to a browse action on the Task Lists browse and renamed as **Populate task list from Template**, which is discussed in more detail in Section 2.2.5.

Figure 5: Previous Menu



2.2.5 Populate from Template Option

The **Copy Task List Templates** function has been moved to to a browse action option on the Task Lists browse and renamed as **Populate from Template** (Figure 6). This option allows you to select one or more tasks.

Figure 6: Populate from Template Option

[illegible]


When you select the **Populate from Template** option and click the Next arrow , you are taken to the screen shown in Figure 7.

Figure 7: Populate from Template Screen

Project Number: [10100](#)

Name: St. Stephens Community College (0000728) (C. Contract)

Main

Output Options

Copy To Task List: Task 1000

Task List Template:

<Select>

PI-Project Initiation

RT-Regression Test

SD-Solution Design

SYSTEST-QA Testing

TEST-More Testing

The report is run as usual, with the exception of the new **Populate from Template** title now being printed at the top (Figure 8).



Figure 8: Populate Task List from Template Report

Project Management - Populate from Template
US Environment (loaded from reg1028)



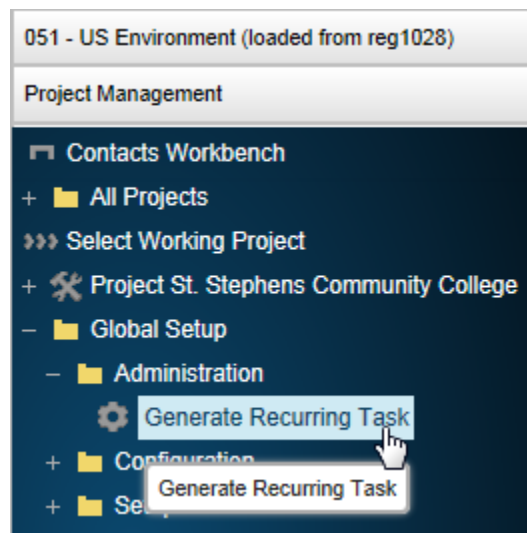
Task List	Tasks Created	Status
Task 1000	3	Created Successfully

2.3 Generate Recurring Task

2.3.1 Menu Item

A **Generate Recurring Task** menu item has been added to **Project Management > Global Setup > Administration** (Figure 9). This function allows you to create recurring task lists from a template and report on the results.

Figure 9: Generate Recurring Task Menu Item





2.3.2 Selection Screen

After you select the **Generate Recurring Task** function from the menu, the selection screen appears, as shown in Figure 10.

Figure 10: Generate Recurring Task Selection Screen

Project Management - PT Generate Recurring Task Kathi Reynolds

Main Output Options

From To Matches

Project: [] [] *

Task List: [] [] *

Template: [] [] *

Frequency: A-All

2.3.3 Report

After you fill out the selection screen and run the Generate Recurring Task function, a report is produced, as shown in Figure 11. This report shows all tasks created, grouped by project and task list.

Figure 11: PT Generate Recurring Task Report

Project Management - PT Generate Recurring Task
US Environment (loaded from reg1028)



Project	Task List	Template	Tasks Created	Task	Assigned To	Next Due Date	Status
---------	-----------	----------	---------------	------	-------------	---------------	--------

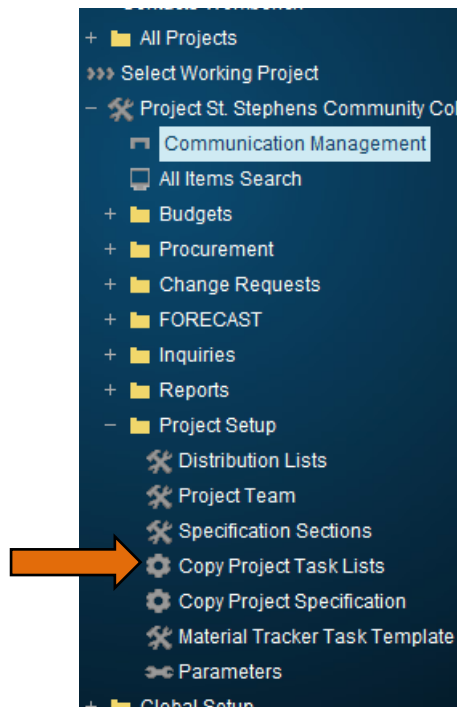


2.4 Copy Project Task Lists

2.4.1 Menu Item

A new **Copy Project Task Lists** function has been added to the **Project Management > [selected project] > Project Setup** menu (Figure 12). This function copies task lists from another project.

Figure 12: Copy Project Task Lists Menu





2.4.2 Selection Screen

The selection screen for the **Copy Project Task Lists** function is shown in Figure 13.

Figure 13: Copy Project Task Lists Selection Screen

Field Definitions

From/Source Project

The project to copy the task list from.

Task Lists

Select the task list number(s) to be copied.

Import Option

How to deal with records that already exist in the task list:

- **Overwrite Existing Entries** - If an entry exists with the same code as an entry being imported, use the description from the imported entry.
- **Keep Existing Entries** - If an entry exists with the same code as an entry being imported, keep the description of the existing entry.
- **Delete Existing Entries** - All entries in the project task list will be deleted before importing the new entries.



2.4.3 Sample Report

A sample of a report showing task lists that have been copied is shown in Figure 14.

Figure 14: Sample Copy Project Task Lists Report

Project Management - Copy Project Task Lists						
US Environment (loaded from reg1028)						
Task Lists	From Project	From Project Name	To Project	To Project Name	Import Option	Status
Task 1000	10102	Berkshire Schools FM	10100	St. Stephens Community College	Keep Existing	Successfully Copied