priority™

Collaboration Script

Clip Link: http://www.eshbel.com/Movie_Search/Collaboration_CLip.htm
Note: Yellow highlights indicate action instructions.

Using Tasks (00:00-01:11)

In this demonstration, we will look at a couple of examples of how you can use ***Priority***'s **Tasks** form to help you stay on top of both personal and team tasks.
Often someone wants to initiate a discussion or exchange of ideas regarding a matter that requires the attention of several of his or her colleagues.
Priority tasks and activities are designed for managing this sort of collaboration, or "Discussion". Work teams can share a single task in which they create, manage and update their discussion, thus ensuring that everyone stays on the same page. Using Discussions to replace "traditional" e-mails has one very significant advantage – the entire exchange is maintained in a single, central hub. We have learned the hard way that traditional e-mail threads are not an appropriate tool for managing this sort of dynamic collaboration, since participants tend to start "side threads", which disrupt the concept of keeping everything centralized in one place. Discussions can also be maintained in text forms attached to project activities, sales opportunities and other types of records, enabling multiple users to contribute their input in one central place.

Initiating a Discussion (01:12-01:53)

A user who wants to initiate a discussion opens a task and lists any participants or groups with whom they want to discuss that task. Note that there is no limit to the number of groups to which any one person can belong. Thus, you can create special interest groups and share the discussion with one or more of these groups. After defining the individuals and groups that are part of the discussion, any user can easily notify the other participants of updates to the discussion. Participants can be added to or removed from the discussion at any time.

Recording Your Comments (01:54-02:34)

To record your remarks in a discussion, enter the **Notes** sub-level of the **Tasks** form. A preformatted comment can be added with one click, or by pressing **Ctrl+K**, so that any notes being posted are preceded by a dividing line and timestamp, and followed by a greeting and user signature. To customize the user signature that is inserted in text forms such as this one, select **User Signature** from the upper **File** menu and choose the **Text Forms** option.

Linking Related Documentation (02:35-04:36)

Text recorded in this form can also include links to related records in ***Priority***, or indeed to any document or entity in ***Priority***. These links enable participants to move directly from the discussion to the record or entity in question. For instance, use **Ctrl+L** to copy a link to a

specific order, invoice, project activity or any other form record and then press **Ctrl+V** to paste it into the desired location in the **Notes** sub-level form. The same shortcut keys can be used to add direct links to any files that are stored using ***Priority***'s document management facilities. You can also copy a shortcut to any entity accessed from the Main Menu, such as a form, report or wizard, and paste this shortcut into the **Notes** sub-level form. And of course, you can include a link to any web site as well. Related files can also be attached to the task itself, in a parallel sub-level form. Task participants can then collaborate on the attached files as well. Built-in status management capabilities ensure that multiple users cannot edit the same file simultaneously.

Notifying Others (04:37-05:39)

Once the user has finished filling in any information that is pertinent to the discussion, he or she can return to the upper-level form and notify other participants that the discussion has been updated. Users can automatically generate an e-mail notification containing a link to the discussion task simply by pressing **Ctrl+S**. Easier still, pressing **Ctrl+O** creates an e-mail message addressed to all the designated participants and group members, containing a link to the discussion as well as the notes recorded for it. Any of these participants can then use the provided link to open the task and add their own notes and attachments, and notify the others of their changes.

Following Up on Ongoing Tasks & Activities (05:40-08:56)

Some tasks and activities may remain ongoing for a period of several weeks or even months . Generally, the easiest way to track the progress of such a task or activity is by means of status updates. However, not every update will involve a change in status. In such cases, you can use the **Time Stamp** column to get a better idea of which open tasks and activities have been updated recently. For example, say you are in charge of a team of sales representatives and want to track the progress they are making on open sales opportunities. You run a query in the **Sales Opportunities** form to retrieve all opportunities with the "In Progress" status that have been recorded for a particular sales rep, and sort the results by **Time Stamp**. Based on the **Days at This Status** column, it would appear that several of these opportunities have not been updated in some time; however, you need only glance over at the **Time Stamp** column to see that all opportunities have in fact been updated within the last few days. Moving to the **Remarks** sub-level form, you can see that, in one such case, the sales rep has been calling and emailing the customer contact at least once a week, but has not yet managed to speak with the contact in order to assess her interest. Similarly, the **Time Stamp** column in both the **Tasks** and **Project Activities** forms indicates the date and time when the task or activity was last updated, including changes to the notes or remarks recorded in the sub-level form.

When collaborating on a complex or long-term sales opportunity or project activity, you may want to break it down into a number of smaller linked tasks in order to track progress at a finer resolution and ensure that all related remarks and discussions are easy to locate. For instance, say you've opened a new project activity within an existing project. During the course of this activity, a number of individuals within the firm are expected to provide input

and record ongoing feedback from different customer contacts. The ongoing discussion can be recorded as a single thread within the **Internal Dialogue** sub-level form; however, such a lengthy thread can make it difficult to locate specific comments. In such a case, it may be preferable to open several tasks and link them to the project activity. Discussions for each task can then be maintained separately, in a sub-level of the relevant task.

Managing Your Personal Agenda (08:57-09:46)

As a busy professional, you may also want to take advantage of the **Notes** sub-level of the **Tasks** form to manage your own personal agenda. For instance, say there are a few small matters that you want to follow up on today and you don't want to open a separate record for each one. You can open a single task which contains a list of the various items that require your attention, without adding additional participants. If any of these items involve an existing task, activity or other record, you can include links to each of these records within this one central task, using the same commands we demonstrated earlier.
This concludes our demonstration of ***Priority*** tasks.