Teczo Features Quick Guide

How to use ARB in various modules

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1.0   What is Action Required By (ARB)?

Action Required By (ARB) is a feature that aims to help users prioritize which topics or items to deal with. Owners and moderators can assign action items to other users from within various modules. This feature is designed with functionality that will help the assignee and owner to be notified of updates.   All modules except Lead Management, Timesheet and Hourly Report are equipped with this feature.

2.0   View action items in various modules

1. Select a topic from a module summary page by clicking the topic item to open the details page.
    Users can also double click the item to open a dedicated page for the topic details.
2. Click the Actions tab located in the comment column. The actions are grouped per state: Open and On-Hold.
3. Double click an item in the Actions tab summary list to see the complete details of the action item in a separate tab.

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3.0 Add a new action Item in a Module topic

1. Follow steps 1 to 2 of View action items in various modules.

2. Click the Add Action button to open the add action page. You can only add an action item if you're the Module Administrator, Owner and/or Moderator of the topic and you have Write access rights to the Action module.

3. Fill in the details and add access for other users from the access rights list.

Notes:
- The Action Title field is automatically filled with the editable value "Action for ID – Module Topic Title". The suggested value is to help the user identify the action item through the Action module.
- Make sure to fill in the Assigned To, Action Type and Action Status fields, so the assigned user will be notified of the action and knows what he or she is supposed to do in a glance.
- Check "Follow up" if you require weekly notifications to the assignee and owner of the action item to be sent out.
- Required fields in yellow need to be filled in to successfully save the new action item.

4. Click Save & Close to save and go back to the Actions tab or Close to cancel adding a new Action.
   Note: Action items successfully added from a module will also automatically be reflected in the Action module summary table as a new item.

4.0   Diagram showing ARB Usage

Source Topic (Any Module) → Actions Tab → Create ARB → Add Action → Set Assigned To, Type, Status & Deadline → Action Topic

Add Action:
- ✓ Owner: From Source Topic
- ✓ Assigned To: person assigned to do action

Create ARB:
- ✓ Contains link to Action topic
- ✓ Shows members, age (time elapsed since last update), status

Action Topic:
- ✓ Marked with ARB NTI
- ✓ Linked to Source Topic
- ✓ Will show up in Actions Tab
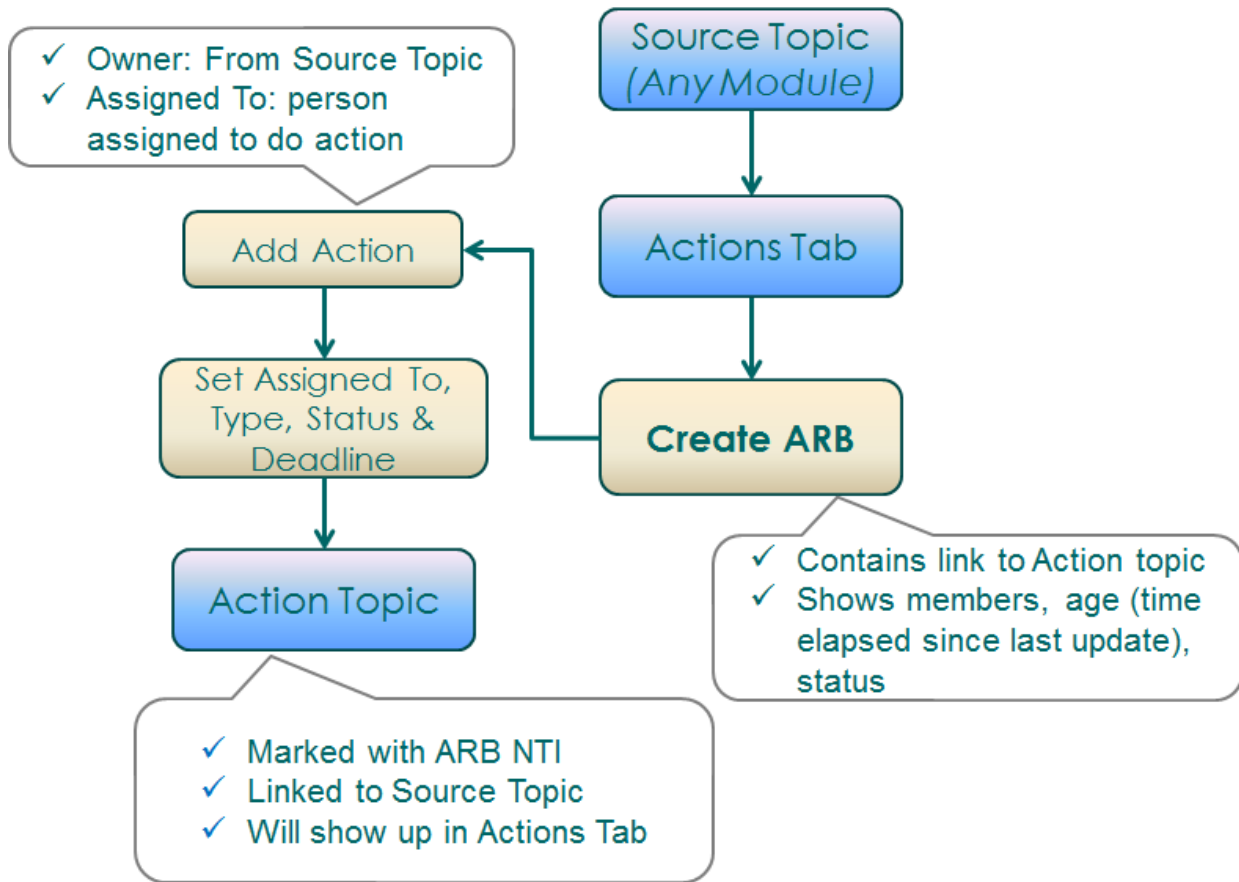
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5.0 Topic indicators related to Action items in a module and to the topic's action tab

Icon	Meaning	Shown in	Icon disappears
NEW	The action item is a newly created action item	Actions tab to all topic members	3 days after the action item was created
	Changes have been made to the details of this action item	Actions tab to all topic members	When you view the action item details
1	Comments have been added to this action item The number indicates how many new comments since you last accessed the action item	Action tab to all topic members	When you view the action item details
	Access rights have been changed for this action item	Action tab to all topic members	When you view the action item details
	You have been added to the action item	Action tab to the user who has been added	When you view the action item details
	The action item has passed the deadline and is overdue Hovering over the icon will display the number of days, weeks, months or years it was overdue	Module Summary Table including Action Module to all topic members	When the action item is moved to Closed or Archived
ARB	The Action item has been assigned to you	Action Module Summary Table to the assignee of the action item	When the action has been assigned or transferred to someone else
	You have one or more unread action items	Module Summary Table to all topic members	When the action item has been Read
RED Deadline	The action item is more than 1 day overdue Hovering over the icon will display the number of days, weeks, months or years it was overdue	Action tab to all topic members	When the deadline has changed to a future date or the action item is moved to Closed or Archived

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6.0 Notifications and Reminders

Once an Action Item has been created and linked, the owner and moderators of the source topic and also the assignee of the action item will receive notices and reminders through Teczo messaging and email. Below the various notices are listed.

Notifications & Reminders	Who	When	Where
Weekly notices about the status of the Action item If the Action item "Follow Up" field has been enabled or checked	Action item owner and assignee (assigned to)	Every Monday until the action item was closed	Email and Teczo Messaging (Notifications tab)

Weekly Reminder of your Action item   01Sep2014

Here are the updates of your action items in myteczo.com:

1. AC001753 - action title 3
   Action Type: something
   Action Status: 1234567891asfasfsdfsdfgsa sadfgsadgsadgsadg sadgas
   Assigned To: Alma Marie Calma
   Submitted On: 22May2014 10:38 AM
   Deadline: 29May2014
   Remarks: Due 4 months ago

2. AC001773 - 1051h
   Action Type: fancy
   Action Status: test1
   Assigned To: Bianca Cabingan
   Submitted On: 27Aug2014 04:54 PM
   Deadline: 28Aug2014
   Remarks: Due 1 month ago

3. AC001774 - 1051h-1
   Action Type: test1.
   Action Status: test3
   Assigned To: adas asdasd
   Submitted On: 27Aug2014 05:12 PM
   Deadline: 29Aug2014
   Remarks: Due 1 month ago

Notification that the Action item has been updated	Action item owner and assignee (assigned to)	Upon saving the updated action item	Email and Teczo Messaging (Notifications tab)

Action   ▼   ◀   ▶

Action item has been updated   08Sep2014

Action item AC001921 - PP005974 - TESTING ARB has been updated.

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Notifications & Reminders	Who	When	Where
Notification that a comment has been posted on the Action item	Action item owner and assignee (assigned to)	Upon saving the comment to the action item	Email and Teczo Messaging (Notifications tab)

> **Action item has been updated and a comment has been posted**   12Sep2014
>
> Johnrey Angolluan commented and updated the status of the Action item AC000991 - F.
>
> Comment 1 by Johnrey Angolluan on 12Sep2014 10:20 AM
>
> testing zxc
>
> Updated Status:
> Action Status: New to In progress
> Assigned To: No Value to Bianca Cabingan

Notifications & Reminders	Who	When	Where
Reminder before Action item deadline	Action item owner and assignee (assigned to)	5 days and 1 day before the deadline	Email and Teczo Messaging (Notifications tab)

> **Action item deadline of completion is in 5 days**   04Sep2014
>
> The deadline for the completion of your Action item AC001844 - ARB EWAN is on 09Sep2014.
>
> Please ignore this message if the Action item has already been completed. To stop receiving this reminder, please move your item to the Closed state.

Notifications & Reminders	Who	When	Where
A daily reminder that the Action item deadline has passed	Action item owner and assignee (assigned to)	Every day after the deadline until the Action item is closed or archived	Email and Teczo Messaging (Notifications tab)

> **Deadline for the completion of Action item has ended**   01:03 AM
>
> The deadline for the completion of the following Action items has passed:
>
> - AC000100 - OVUIJJBWIJ PCGEPCIPEI TGFICCLZIW VRYLVIQVVD DJBNUQVZTO
> - AC000353 - AC testing....01
> - AC000415 - Adding Action....
> - AC000864 - Automated Testing: Moving on to the Next Page [47542]
>
> You may revise the deadline through editing the Action item if needed.
>
> Please ignore this message if the Action item has already been completed. To stop receiving this reminder, please move your item to the Closed state.