# Action Module Quick Guide

## How to use Action Module

# Action Module Quick Guide

## 1. What is the Action Module?

An action item is an ad-hoc work that requires follow-up execution. Some of these actions can be arranging meetings, forwarding important information to colleagues, job orders, project status updates and many more commonly used in Finance, IT, Sales, and Marketing departments of organizations.

The Action module keeps your action items in one place, and the management will have a clear view of the impact of proper planning, scheduling, and delegating of jobs to the members.

## 2. How can I access the Action Module?

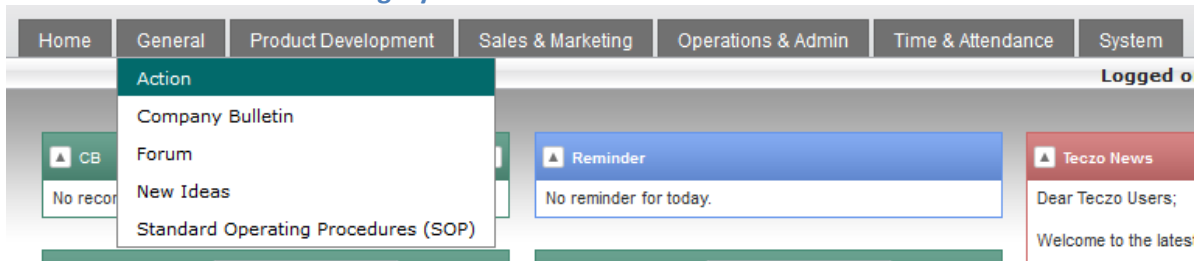The Action module can be accessed in different ways:

### 2.1. Dashboard
1. Upon logging in, you will be directed to the dashboard/home page.
2. Clicking the Action link from the left side menu of the page or module abbreviation through the module widget (AC) will redirect you to the module's summary page.

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## 2.2.    Menu Tab > General category



1. You can also access the module through the menu header tabs by going to the General tab/category which you can see the Action link.
2. Clicking the link will redirect you to the summary page.

## 3.   How can I add an action item?

You can easily add an action item through the summary table.  Just click the "Add Action" button situated along the rightmost position of the State Bar.  If you don't see this button, please contact your system administrator.
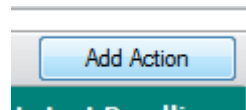


## 3.1.    Add Action item Field Details



1. Action Title – type the title of the action item you are posting.
2. Description – type the description of the action item.

3. State – by default, this field is disabled, new action items must have Open state. In the case you need to change the state, you can edit the action item or move it to other states through the state bar.
4. Priority – select the priority of the action item.
5. Department – select the department appropriate for the action item you are creating.
6. Assigned To – select the user assigned to work on or follow up on the action item.
7. Action Type – select the action type of the item.
8. Action Status – select the status of the action item.
9. Moderated By – select one or more moderators to handle the action item details. Moderators can edit the action item such as change field values, add attachments, add or remove users in the access rights, etc. If you create an action item, you're automatically assigned as the moderator of the action item, but you can remove yourself if you feel you don't need to be the moderator. In that event you can no longer edit the action item details after saving.
10. Follow Up (checkbox) – enable the follow up functionality by checking the option. Enabling this will send weekly notifications to the assignee and owner of the action item.
11. Owner – assign the user who needs to own the action item. If you create an action item, your name is selected by default. If someone else needs to be the owner, you can select another user to be the owner instead. In that event you can no longer edit the action item details after saving.
12. Initial Deadline – set the initial date where the action should be finished.
13. Revised Deadline – select a revised date where the action should be finished. Disabled by default in add page.
14. % Completed – set the percentage of the action completion.
15. Immediate Respondents – select the users that you need to respond to the action item immediately. Typing characters in the box will filter the list of the users that have access to AC module. They will be given notice of the updates that will be made to the action item details.
16. Keywords – for easy searching or filtering of your action item, it is advisable to set values for this field.
17. Initiated by – select the user who initiated the action item. In the event that the person doesn't have access to the module, you can have your name as the initiator which is selected by default. Upon saving the action item, this field cannot be modified.

### 3.2. Add Action Item Features and Functionalities

1. Attachment – you may attach files that are related to the action item. You are allowed to attach file based on the maximum size subscribed by your company. You can use the drag and drop functionality in attaching the files.
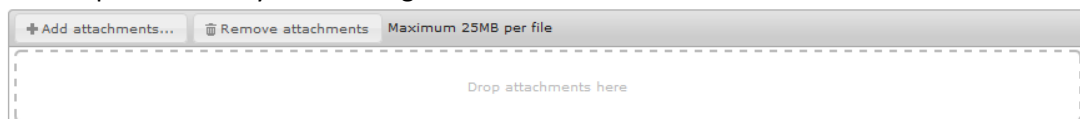


2. Access Rights – you may select other users to view your action item. Upon saving, the Moderators, Initiator and Owner are automatically chosen. In the event that you removed your name in the access rights page and you're not selected as moderator, initiator or owner, you will not be able see the action item you have posted.
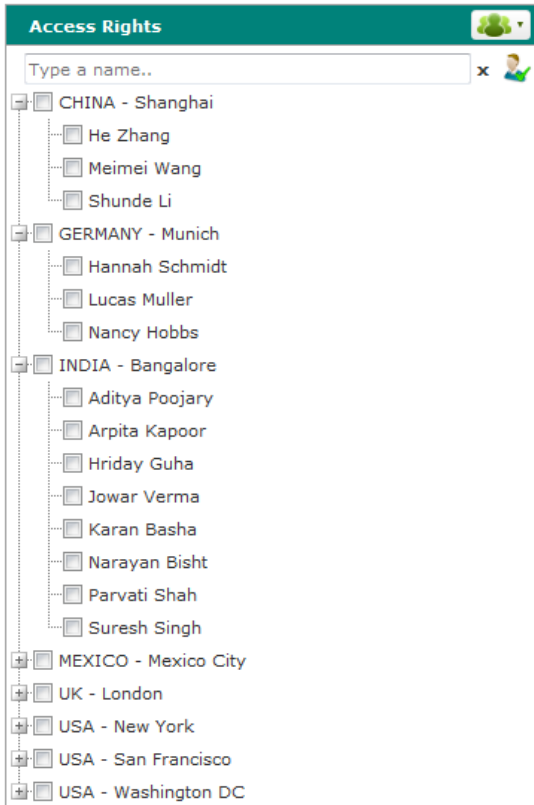
a. User Group – you can select users under a user group through this functionality.
- Click the user group icon on the upper rightmost part of the Access Rights column.
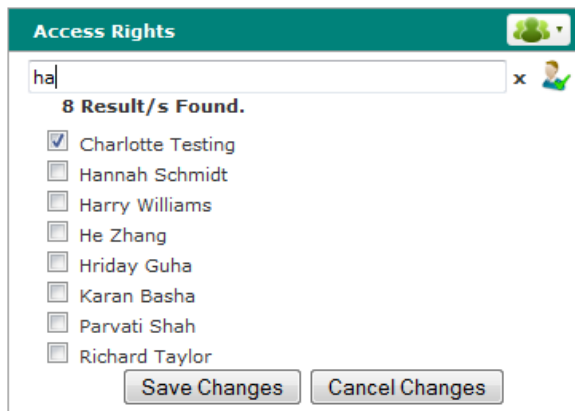


- Default (company defined) and Customized (user defined) user groups will be shown.
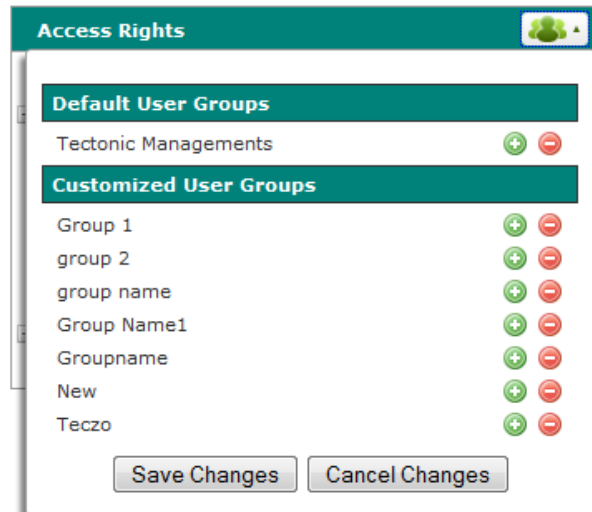
Tips: Hovering over the user group's name will show the names of the group members.

- Click the plus ⊕ icon to add the user group's members and negative ⊖ to remove.
- Click the "Save Changes" button to add the members in the Access Rights list.

b. Type and Search – you can easily filter the list by using the type and search functionality. Simply typing one or more characters of a name will filter the list of users. In case one user is listed, pressing Enter will then automatically select that user in the access rights.



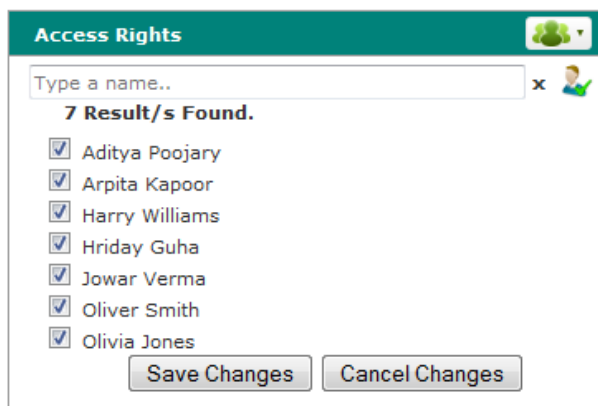c. Preview selected users – you can preview all the names of already selected user by clicking the icon besides the type and search text box.





3. All fields highlighted in yellow are required. You require to fill in those fields to be able to save the action item successfully.

4. You have the following options to save or close the page:
    a. Save & New – save the action item and create a new one.  You will be directed to the new Add page.
    b. Save & Close – save the new action item and return to the summary table.
    c. Back – return to summary page without saving or posting the action item.

## 4. Where can I view the action items I have posted or I am included in?

The list of action items posted by you or you have been given access to can be seen in the summary table.  The summary table is located below the State Bar.



## 4.1. Summary Table Column Headers



1. Check All box – upon checking the box, selects all action items currently displayed in the summary table.
2. Updated On – indicates the date when the action item details were last updated. If you see a time, it means the action item was updated on the current date at that time.
3. Updated By – indicates the name of the last user who updated the action item by either updating the details or makng a comment.
4. AC ID – a unique item identification of the action item.
5. Action Title – indicates the title of the action item.
6. Action Status – indicates the status of the action item.
7. Moderators – assigned to, owner and moderators of the action item.
8. Latest Deadline – indicates the latest deadline completion set for the action item.

### 4.2. Summary Table Features and Functionalities

1. Hovering over abbreviated values will show their description.



2. Hovering over the moderator's value will show the assigned to, owner and moderators of the action item.
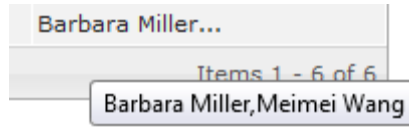


3. You can navigate to different pages through the paging feature below the summary table.



4. You can also go through different states through the state bar.
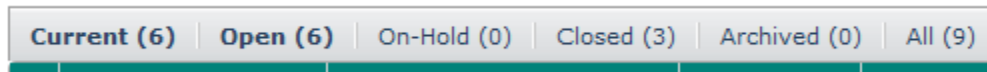


5. Clicking the action item row will open the details page in the pane below.  Double clicking will open the details page in new tab.

## 5. What is the Details Page?

The Details Page contains the details of each action item. It consists of three sections, namely: Details Column, Comments Column and Access Rights Tab.



### 5.1. Details Column

1. Action Item Details – displays values selected or entered through the Add or Edit page. Additionally, it shows the following auto-generated fields:
   a. Submitted By – name of the user who submitted the action item.
   b. Submitted On – date when the record was submitted.
   c. Updated By – name of the user who last updated the action item record.
   d. Updated On – date when the action item was last updated.
   e. Closed By – name of the user who moved the action item to the closed state.
   f. Closed On – date when the action item was moved to the closed state.
2. Edit Button - if you're the moderator or owner of the action item, you can see an Edit button in the upper portion.

3. Attachments – you can see here different files attached to the topic. You can archive or remove attachments here if you have edit rights.
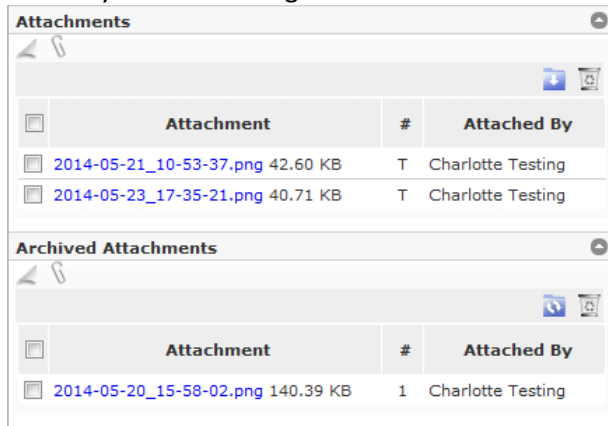


a. Delete Attachment
- Select one or more attachments to delete by clicking the checkbox in the first row.
- Upon checking the selected attachments, click the recycle bin icon to delete the selected attachments.
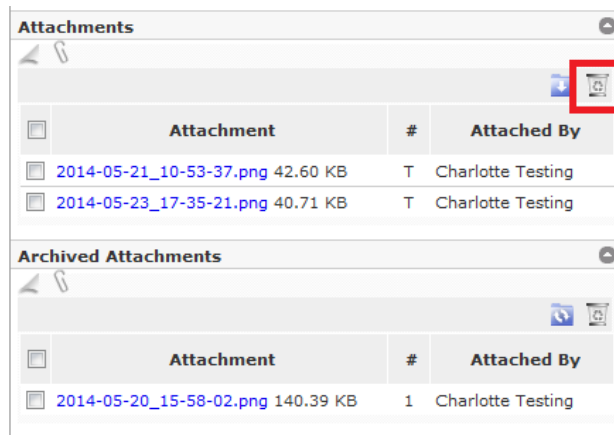


- Confirm by clicking the "Yes" button through the alert message.
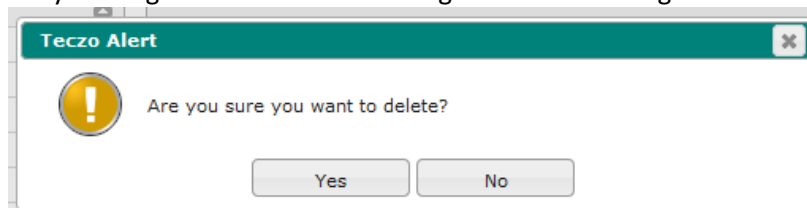
b.  Archive Attachment
  - Select one or more attachments to archive by clicking the checkbox in the first row.
  - Upon checking the selected attachments, click the archive icon to move the selected attachments.
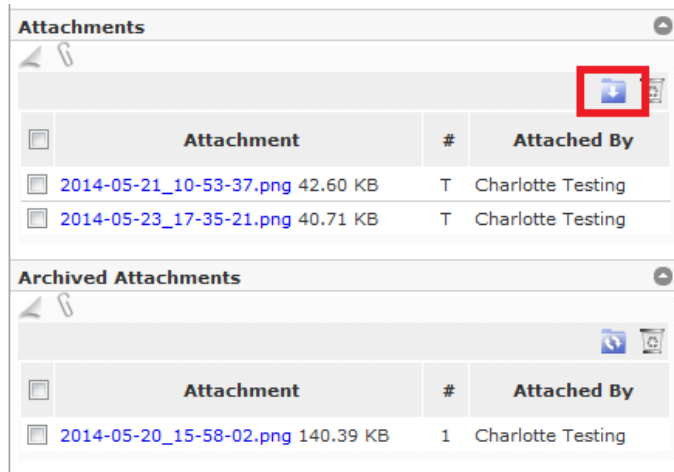


  - You can remove as archived by selecting the attachment from the archived table.  Click the restore attachment icon.
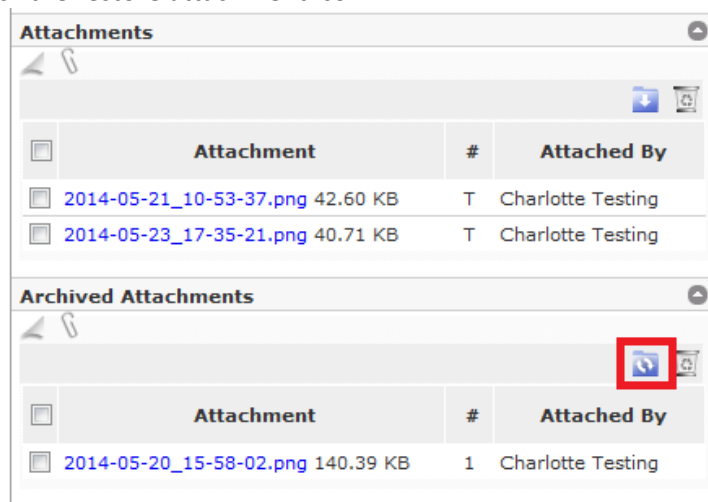


4.  Update History List – all the updates or changes made in the action item details are recorded in the update history list such as adding or removing users, updating field values, attaching and removing files.  To view, click the Update History List link located before the attachments.

### 5.2. Comments Column
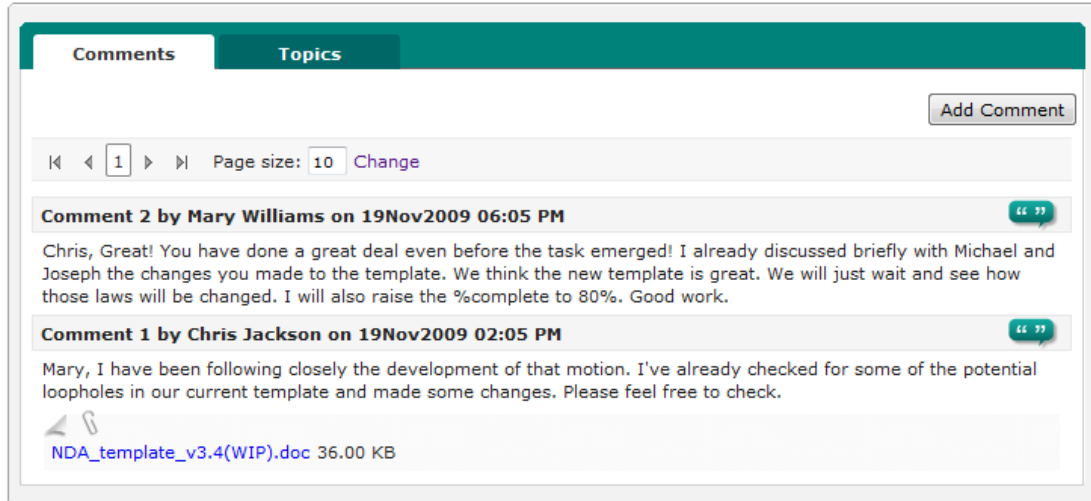


The Comment column includes two tabs:

1.  Comment Tab
    a.  Shows all comments posted for the action item.

    

    b.  You can Add a Comment or Quote a comment.

    

2.  Related Topics
    You can link items that are related to the action item through the Topics tab.

## 5.3. Access Rights Tab

All the users that have access to the action item item are listed.  Click the tab to show the names.



## 6. How can I post or quote a comment?

You can post or quote a comment to an action item if you have queries or something you want to discuss about the action item.
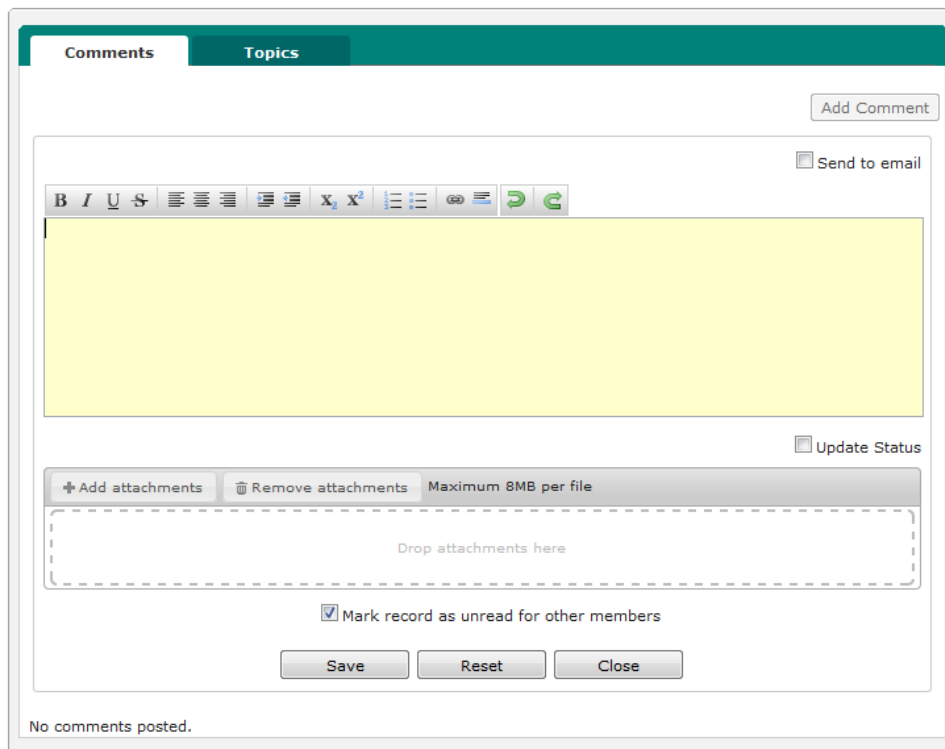
### 6.1.    Add a comment
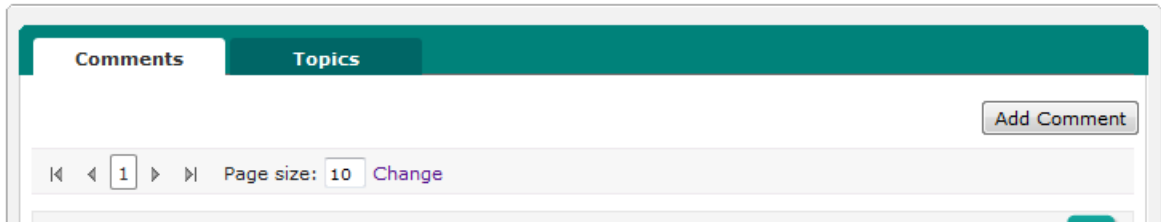


1.  In the comment column you can see the "Add Comment" button.  Clicking the button will open a comment box.
2.  You can use the available editor to enter your comment.
3.  You can also send your comment to other company users by checking the option to send to email.



a.  You can type and search the name of the company users you want to include as recipient.  By default, the action item members are shown in the selection upon clicking the recipient box.
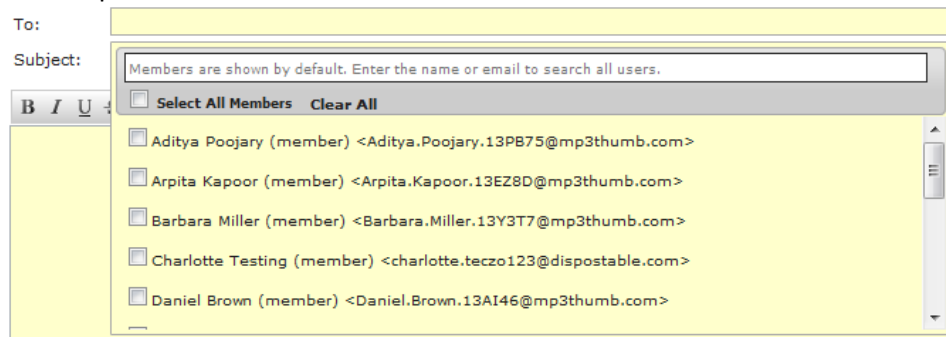


b.  By default, the action item title is the subject. You can change the subject anytime.



c.  Type the comment you want to store and send.

4. You can attach files with the maximum size subscribed by your company. If you're not a moderator or owner, you can only remove the attachments that you've posted. Adding and removing attachments will be recorded in the update history list.
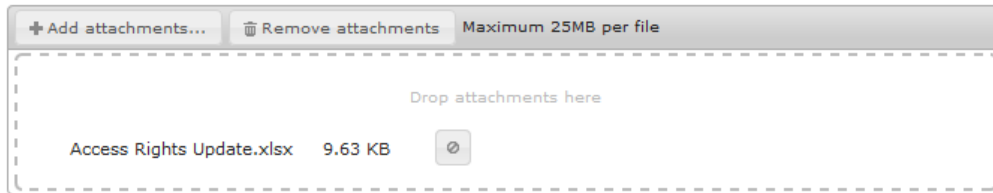
5. You have the option to save the comment and making the action item Read or Unread for other topic members by checking or un-checking the option.

6. Saving the comment successfully will show the action item depending on the selected option for other members in the summary table. Updated by and updated on will be changed as well.

## 6.2. Quote a comment
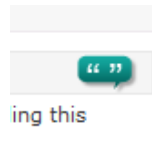
1. You can use this feature to quote a certain comment by clicking the quote icon.

2. Your quoted comment will be included in the comment box which you can change before clicking Save.
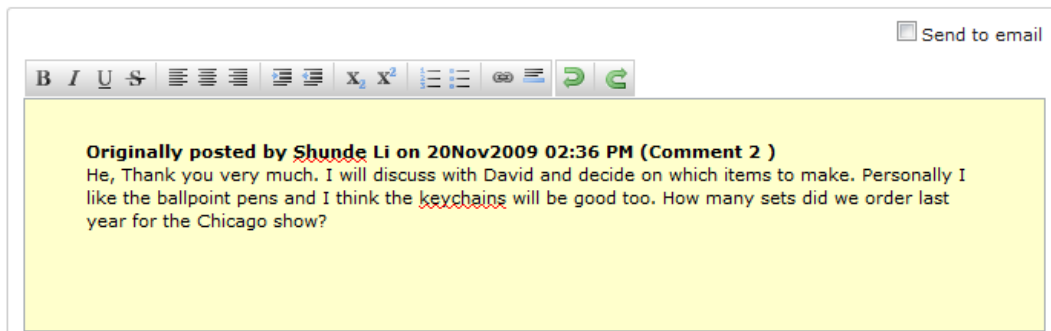
3. You can also send your quoted comments to email by checking the option Send to email..



4. Upon saving successfully, it will be posted as a new comment for the item and the summary table will be updated just like when adding a comment.

### 6.3. Edit a Comment



1. You can use this feature to edit a certain comment by clicking the edit icon besides the quote icon. It is only possible to edit the last posted comment on the topic and provided that you are the last user that posted it.

2. You have the option to send the comment to email as well, just like adding a new comment.

**6.4.** **Update Status Through Comment**

The Owner, Moderators or the Assignee (selected in Assigned To field) users can change the status of the action item through the Comment section together with their comments.

1.  Check the Update Status option below the comment section.
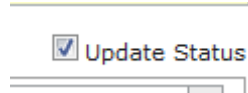
    

2.  Fields such as Action Status and Assigned To will be available for updating.

    

3.  Upon saving the comment, updated values will be reflected in the action item details.

4.  Updates will also be shown together with your recent comment.

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### 7. How can I edit an Action Item?

Users with edit rights to the action item, Owner, Moderators and Module Administrators, are the only allowed users to edit. If you're one of those, you can see an edit button in the header of the action item details column.

| Details | Edit |
|---|---|
| AC000010 - Mobile phones for our Sales Executives | |

**Tags**

M ×

**Immediate Respondents**

| Priority: | Medium |
|---|---|
| Revised Deadline: | |
| Initial Deadline: | 04Dec2009 |

**Description**

Purchase the new PDA smart email-phone for all our salespersons.

**Miscellaneous** ⊙

| Department: | Sales |
|---|---|
| % Completed: | 70 |
| Submitted By: | David Jones |
| Submitted On: | 20Nov2009 11:29 AM |
| Initiated By: | David Jones |
| Updated By: | Module Admin MA000003 |
| Updated On: | 03Nov2011 02:53 PM |

1. Clicking the "Edit" button will direct you to the Edit page. The fields are the same as the Add page.
2. On the Edit page, the State field is already enabled. With this field you can move your action item to any of the On-Hold, Closed or Archived states. Choosing Closed will prompt you to enter closing remarks. Upon saving, the closing remarks will be posted as a new comment on the details page.

| State | Closed ▼ | | Priority | High ▼ |
|---|---|---|---|---|
| | ☐ Send to email | | | |
| | B I U S ≡ ≡ ≡ ≡ ≡ x₂ x² ≣ ≣ ⊚ ≡ ⊃ ⊂ | | | |
| Closing Remark | | | | |

### 8. What is the State Bar?

The State Bar is located below the Search feature on the summary page and consists of the following:
State Headers, Action Dropdown and Add Action button.
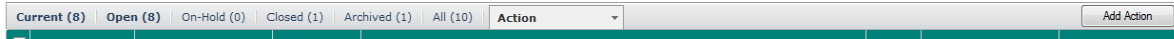


### 8.1. State Headers
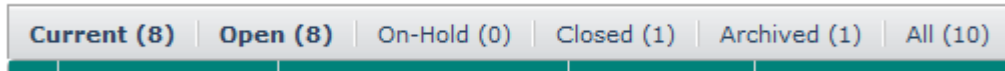


1. Action items are grouped into different states such as Open, On-Hold, Closed, Archived and All. You can click the state headers to filter the items in the summary table aside from filtering through the Advanced Search.
2. The number besides the state name reflects the following:
   a. Current (#) – number of action items currently displayed or filtered in the summary list.
   b. Open (#) – number of action items with Open state.
   c. On-Hold (#) – number of action items with On-Hold state.
   d. Closed (#) – number of action items with Closed state.
   e. Archived (#) – number of action items moved to Archived state.
   f. All (#) – number of all action items in different states, i.e. Open, On-Hold, Closed and Archived. Clicking "All" will show all action items separated per state in the summary list.

### 8.2. Action Dropdown
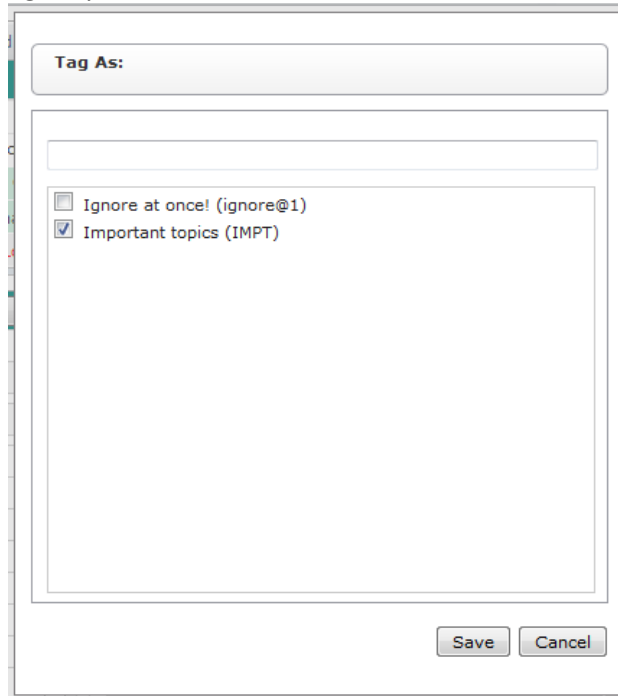
Provides a dropdown list of different actions that can be applied to module items. Select one or more action items from the list by checking the box in the first column of the table then select the desired action.

1. General - can be applied in all action items you have access to
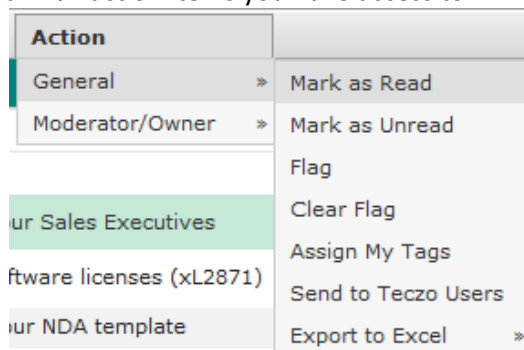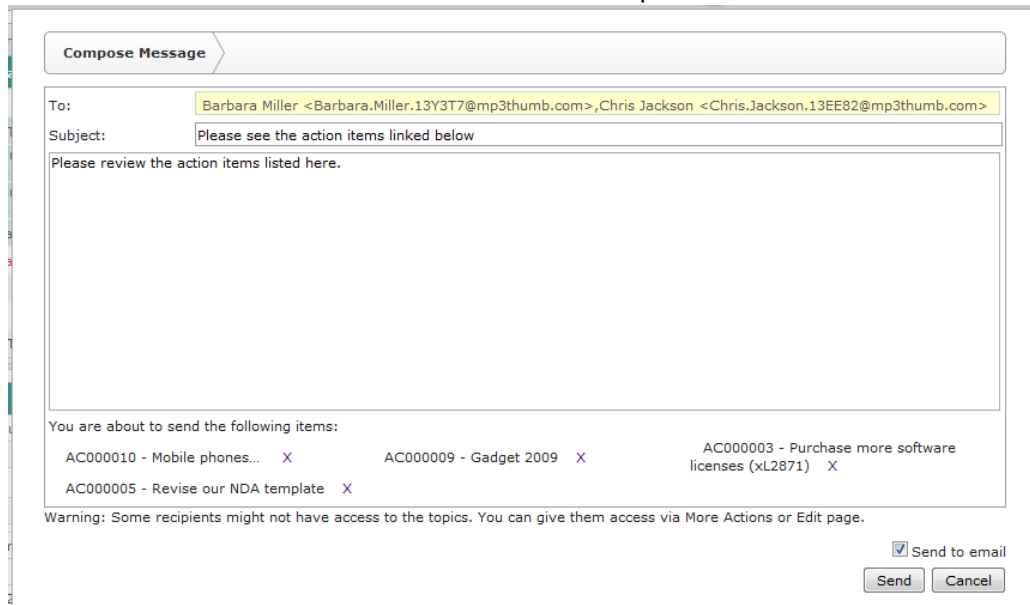


   a. Mark As Read – action items marked as Read will have the rows not displayed in bold.
   b. Mark as Unread – action items marked as Unread will have the rows displayed in bold.
   c. Flag – Flagged action items will have the rows displayed in red. This action helps to remind users of important items they need to follow up on.
   d. Clear Flag – Non-flagged action items have the rows displayed in black. Choosing this action reverts the status of items from flagged to non-flagged.

e. Assign My Tags – you can assign your personal tags in the action items. You can define personal tags through My Account.

**Tag As:**

☐ Ignore at once! (ignore@1)
☑ Important topics (IMPT)

Save    Cancel

f. Send to Teczo Users – you can send one or more action items to other users in their messaging box and email.

- Select the Send to Teczo Users link in the dropdown selection.

**Compose Message**

To:      Barbara Miller <Barbara.Miller.13Y3T7@mp3thumb.com>,Chris Jackson <Chris.Jackson.13EE82@mp3thumb.com>
Subject:  Please see the action items linked below

Please review the action items listed here.

You are about to send the following items:

AC000010 - Mobile phones...   X        AC000009 - Gadget 2009   X        AC000003 - Purchase more software licenses (xL2871)   X

AC000005 - Revise our NDA template   X

Warning: Some recipients might not have access to the topics. You can give them access via More Actions or Edit page.

☑ Send to email

Send    Cancel

- Select users through the type and search functionality, enter a subject and compose your message.
- The message will automatically be sent to their messaging box including the links of the action items you've selected.

- If you check the Send to Email checkbox, the message will also be sent to the recipient's email.
- Click the "Send" button to send the message.
  In the event that the one or more of the recipients does not have access to the action items linked in the message, they will be prompted with an "Access Denied" message upon clicking the action item link.

g. Export to Excel – you may use export to excel if you need to have copies of the action items you have access to. Simply select the Export to Excel link in the Action dropdown selection. You have the following options in exporting to excel:

- Export All – export all action items you have access to including all its details.
- Export Selected – exports all the action items checked in the first row including its details.

2. Moderator/Owner – actions that can be used by the Moderator, Owner or Module Administrator.



a. Make a comment – allows you to make a comment to one or more action items.

- You will receive a prompt showing the list of items to which you have edit rights Step 1 - Notice.
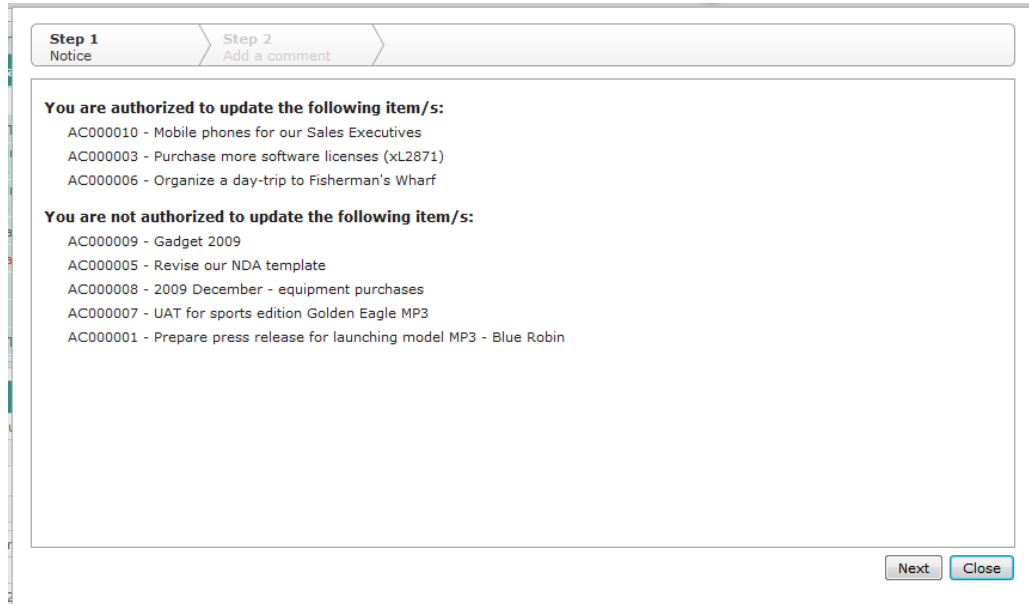
- After clicking the "Next" button, you will be directed to Step 2 – Add a comment where you can compose your message.
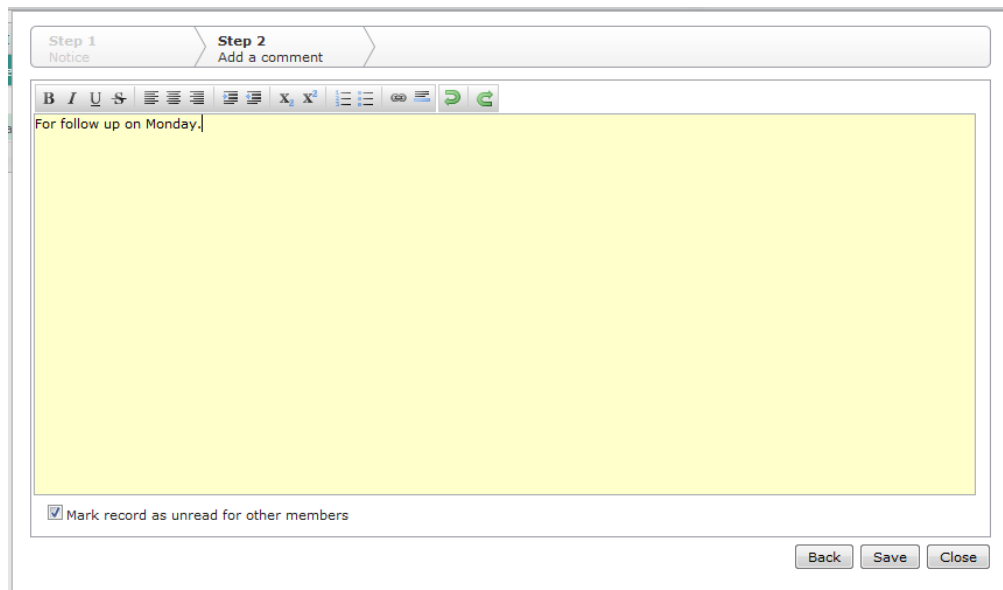


- You have the option to mark the record as unread for other members. Enabling this will make the updated action items unread or bold in the AC summary table of the other members of those action items upon saving.
- Click "Save" to post the comment, "Back" to return to Step 1 – Notice, "Close" to return to the AC summary table without posting your comment.

b.  Add or Remove Access – allows you to add or remove access rights to one or more action items.

- Upon selecting the item/s, you can choose to either Add or Remove Access to such items.
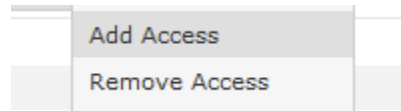


- Upon clicking either the Add or Remove Access from the dropdown list, you will receive a prompt showing the list of items to which you have edit rights. Step 1 – Notice.
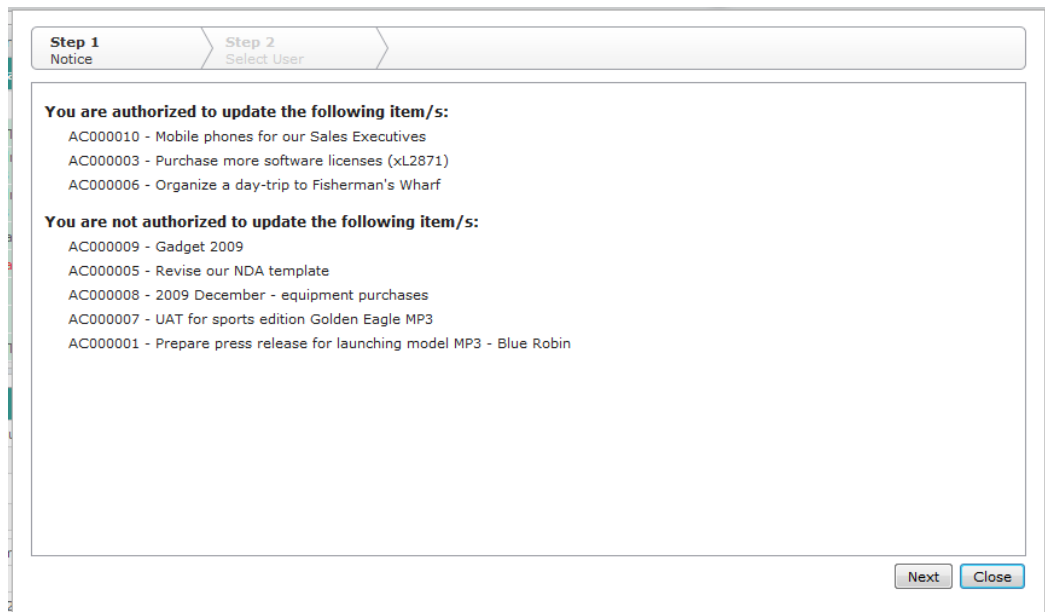


- After clicking the "Next" button, you will be provided with the list of all users with access to the Action module. The list of all users appears on the left side, while the list of selected users appears on the right side.  You can choose to add or remove access for one or more users.  You can also click the name of the selected users in the right side to remove them from the list of users to be given or denied access.  You can filter the list by typing characters in the search box.
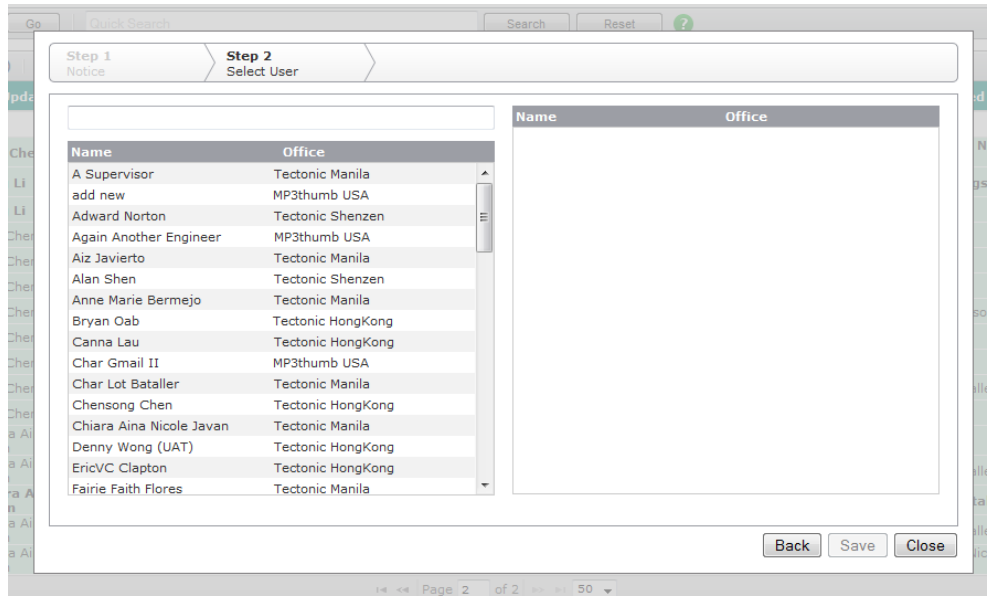
- Click "Save" to add or remove access of the selected users, "Back" to return to Step 1 – Notice, or "Close" to return to the summary table without making any change.

c. Change Assigned Fields – instead of opening the edit page of each item, you can use this action which provides you to change the following:
- Add Moderated By – add one or more moderators to the selected action items.
- Replace Moderated By – replace the moderators of the selected action items.
- Replace Owner – replace the currently selected owner.

d. Change Priority – you can change the priority of one or more action items. Available values depending on the specified values in the Data Maintenance module.



e. Assign Company Tags – you can assign company tags to the one or more action items. Company tags are defined by the system administrator.

f. Move To… – this allows users to easily move one or more action items to other states, either Open, On-hold, Closed or Archived. Choosing the Closed state will prompt you to enter closing remarks.

Tip:   Provide generic remarks or comment if you're selecting more than one item.

### 8.3.    Add Action item button

This is the link where you can add an action item. If you don't see this button, it means you don't have Add rights to the module.  You may contact the System Administrator in order to get Add or Edit rights to the Actions module.



## 9.   How can I filter the list of action items?
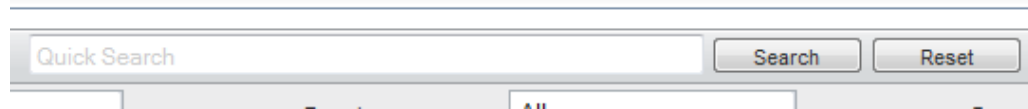
The Search/ Filter bar is where you can search certain keywords or fields to filter the list in the summary table. It consists of two parts: Basic Search and Advanced Search



### 9.1.    Basic Search

1.   Direct Search – you can enter the AC ID of a certain action item and see its details right away.  Pressing Enter or clicking the "Go" button will filter the list.



2.   Quick Search – you can enter keywords in the search box and click the "Search" button to filter the summary list.  This functionality searches basic fields such as ID, Action item Title,

Description and Keywords.  By default, it only searches the action items in the Open state. You can return the summary list to its default value by clicking the "Reset" button.



### 9.2.    Advanced Search



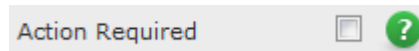1.  You can refine your searching through the Advanced Search.  The list can be filtered using different fields such as State, Department, Action Required, Priority, Status,  Person, *Action Status, Action Type, Date, My Tag and Company Tag.   Click the Advanced Search link in the top right side of the of the Basic Search row to see the available fields.

    *Action Required – checking this enables the user to quickly search items assigned to him/her.



2.  Simply select the desired field values and click the "Search" button.  You are allowed to select multiple values per field.
3.  You can return the summary list to its default values by clicking the "Reset" button.
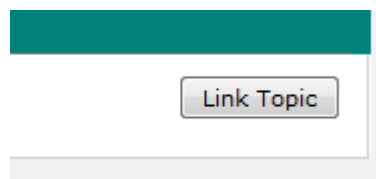

## 10. How to link topics to the action item?

Users with edit rights to an action item (Owner, Moderator or Module Administrator) can link one or more related topics to that action item.

### 10.1.    Link topics from other modules
1.  Go to the Topics tab in the comment column.



2.  Click the "Link Topic" button to open the modal page which shows different steps in linking the topic.

3. In Step 1 – Select Module modal page, select a module where the related topic will come from.  You will see all modules you have right to access.



4. Click the "Next" button to go to the next step.
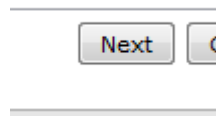


5. In Step 2 – Select Topics modal page, select the related topics from the left table selection. All the topics you have access to in the selected module will be available.

You can use the type and search functionality to filter the list.
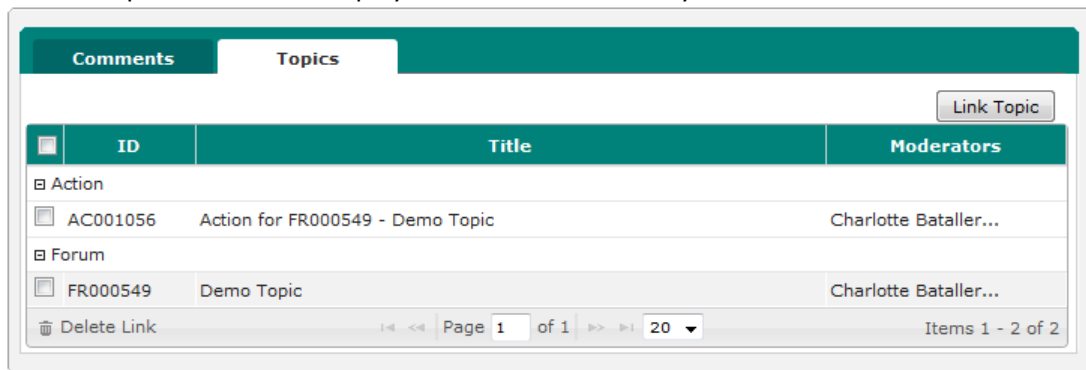
| ID | Title |
|---|---|
| AC000001 | Contact Microsoft representative |
| AC000006 | SOP Documents |
| AC000043 | Consolidate the applications for Application Software Engineer |

6. Click the "Save" button to link the topics.
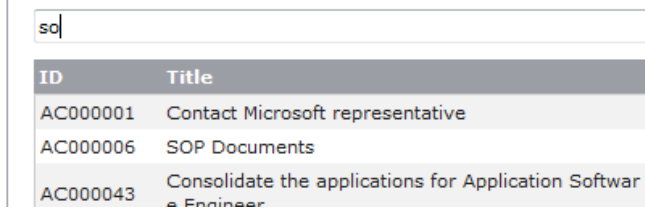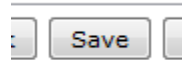
7. Related topics will now be displayed in the tab's summary table.

| | ID | Title | Moderators |
|---|---|---|---|
| ⊟ Action | | | |
| ☐ | AC001056 | Action for FR000549 - Demo Topic | Charlotte Bataller... |
| ⊟ Forum | | | |
| ☐ | FR000549 | Demo Topic | Charlotte Bataller... |
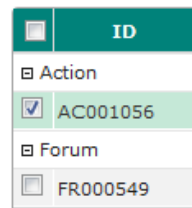
🗑 Delete Link    Page 1 of 1    20    Items 1 - 2 of 2

## 10.2. Removing linked topics

1. Select one or more related topics to be removed by checking the box in the first column of the row.

| | ID |
|---|---|
| ⊟ Action | |
| ☑ | AC001056 |
| ⊟ Forum | |
| ☐ | FR000549 |

2. Click the "Delete Link" button on the leftmost bottom part of the table.

🗑 Delete Link
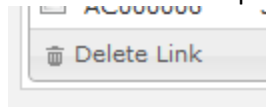
3. Confirm the action by clicking the "Yes" button in the alert message.

**Teczo Alert**

⚠ Removing the linked topics will stop the system from associating them to this item. This will not remove the topics from the system. Do you want to continue?

Yes    No
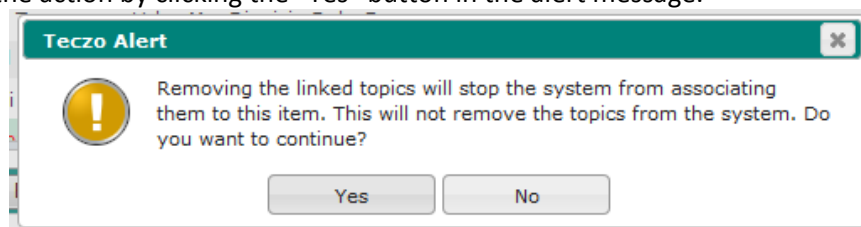
## 11. How to assign an action item from within another module?

Users with edit rights of module topics from any other regular module they have access to (excluding the Lead Management, Timesheet and Hourly Report modules) can add an action item to a topic they own or moderate in that module and assign it to another user. The user should have also have write rights to the Action module to be able to add as well. This allows the user to assign actions to other users such as follow up actions, scheduling of tasks, etc.

### 11.1. Assign Action items from another module
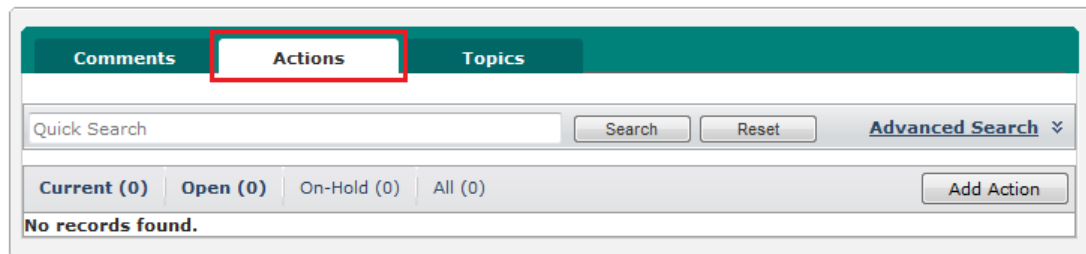
1. Go to any of the modules mentioned above and open the details page of the item you own or moderate.

2. Open the Actions tab located in the Comments column of the item's details page.



3. Click the 'Add Action' button to open the add page.
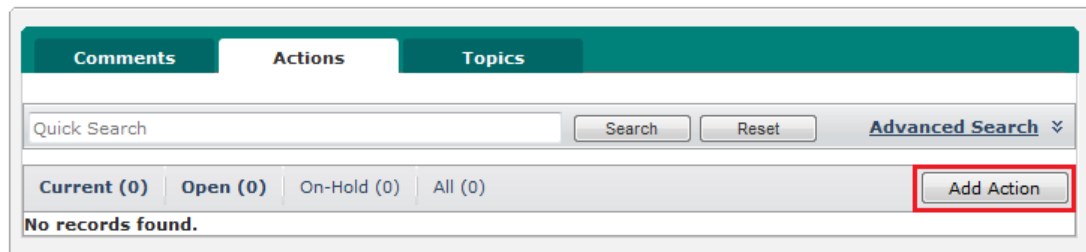


4. Fill in the fields with the preferred values. The Action title is pre-filled with the ID and title of the item where the action item is being linked to. Users listed in any of the person selection dropdowns and the access rights list are those with Write and/or Read rights to Action module.

5. Click "Save & Close" to save the new action item. Click "Close" to cancel the adding of new action item.



6. Upon saving the action item will be shown in the summary table of the Action tab with the most relevant details.

7.  The action item will also be shown in the summary table of the Action module of the selected users. The assigned to user will additionally see an ARB NTI icon as well to indicate the topic has been assigned to him or her.



## 11.2.   Notifications and warnings upon saving the new action item

The action item Owner and Assignee (Assigned To) users will receive the following warnings and notifications through email and Teczo messaging:

1.  A weekly notification (every Monday) of the item status via email and Teczo messaging if the Follow Up field is checked or enabled.
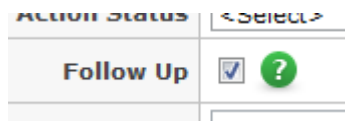


2.  Deadline reminders:

    a.  5 days before the deadline
    b.  1 day before the deadline
    c.  A daily notification if the deadline has passed and the item is not yet moved to Closed or Archived.

3.  If the action item has been updated or comments have been posted.

## 12. What are the record indicators in the summary table?

Notification icons or indicators are designed so that individual users can quickly see what the record updates are.  For example, if I am not interested in any access rights changes to a certain action item, I can just ignore it.  Similarly, if I am interested in people's comments, I can choose to view action items where there have been new comments added.

When an item is updated, you will see Notification Icon(s) displayed in the Action Title column.

# Action Module Quick Guide



Definitions of the Notifications Icons

| Icon | Meaning | Icon disappears |
|------|---------|-----------------|
|  | The action item is marked as sticky.  The action item will be shown in the first row regardless of what sorting has been applied by the user. | When the action item has been removed as sticky by the module administrator |
|  | The action item has one or more attachments | When all attachments have been removed |
|  | The action item is a newly created action item | 3 days after the action item was created |
|  | Changes have been made to the details of this action item | When you view the action item details |
|  | Comments have been added to this action item

The number indicates how many new comments were added since you last accessed the action item | When you view the action item details |
|  | Access rights have been changed for this action item | When you view the action item details |
|  | You have been added to the action item | 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 | When the item action item is moved to Closed or Archived or the deadline has moved to a future date |

| Icon | Meaning | Icon disappears |
|------|---------|-----------------|
|  | The Action item has been assigned to you | When the action has been assigned or transferred to someone else |

## 13. Who are the module users?

| User Type | Rights to Item |
|-----------|----------------|
| Owner | • User who needs to work on the action item<br>• Can edit the action item i.e. Add/Remove Access, Edit Details, Close the action item<br>• One per action item<br>• Can comment to the action item<br>• Can attach files |
| Moderator | • Assigned to moderate the action item<br>• Can edit the action item, i.e. Add/Remove Access, Edit Details, Close the action item<br>• One or more users<br>• Can comment on the action item<br>• Can log actions in the Action Log tab<br>• Can attach files |
| Assignee (Assinged To) | • Assigned to do or finish the action item<br>• Can update the status of the item through the comment section<br>• One per action item<br>• Can comment to the action item<br>• Can attach files |
| Item Member (usually called Action item Member) | • Can view the action item details<br>• Can comment on the action item<br>• Can attach files |
| Initiator | • User who initiates the action item<br>• Can comment on the action items<br>• Can attach files<br>• Can be removed as item member |
| Submitter | • User who submitted the action item<br>• Can comment on the action items<br>• Can attach files<br>• Can be removed as item member |
| Module Administrator | • Can access all the action items in AC module<br>• Can edit all the action items in AC Module<br>• Can comment on all the action items<br>• Can attach files |