

### How to use Action Module

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- C Edit X Updated On 03Nov2011

### 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.

My Records				
	-	🔺 AC	Latest	- C Edit
al Search		Title		Updated Or
vned Items		Gadget 20	009	03Nov2011
erated Items		Mobile pho	ones for our Sales Executives	03Nov2011
		Purchase	more software licenses (xL28)	71) 03Nov2011
General		Revise ou	r NDA template	03Nov2011
	_	2009 Dece	ember - equipment purchases	03Nov2011
tion (0)		UAT for sp	ports edition Golden Eagle MP3	20Nov2009
ompany Bulletin (0)			ress release for launching mod	el 20Nov2009
rum (3)	Þ	MP3 - Blue		
w Ideas (0)	Þ	Organize	a day-trip to Fisherman's Wharf	20Nov2009
andard Operating Procedures DP) (0)	Þ			
Product Development				
ug Tracker (8)	Þ			
ertificate Tracking (0)	Þ			
oduct Change Tracking (0)	Þ			
oduct Development Tracking (0)	Þ			
echnical Sunnort Center (6)	(F)			



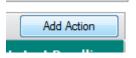
### 2.2. Menu Tab > General category

Action Company Bulletin	Logged o
Company Bulletin	
CB Forum	Teczo News
No recor New Ideas No reminder for today. De	Dear Teczo Users;
Standard Operating Procedures (SOP)	Nelcome to the lates

- 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 <u>summary page</u>.

### 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 <u>State Bar</u>. If you don't see this button, please contact your system administrator.



### 3.1. Add Action item Field Details

Add Action				Access Rights	<b>48</b> 1
Action Title				Type a name	× 🏖
	B I U S ≣≣≣ ⊑ ⊑ X₂	x² 등 등 ∞ ≅ ⊃ €		100-Acre-Wood     Cute Test Rabbit     Mikasa Ackerman	
Description				ACS Africa Mark82ph 3 Michael Banting Miles Edgeworth test test	
State	Open 🔻	Priority	<select></select>	ACS Holland	
Department	<select> *</select>	Assigned To	<select></select>	acsrich2	
Action Type	<select></select>	Action Status	<select></select>		
Moderated By	Charlotte Bataller	Follow Up			
Owner	Charlotte Bataller	Initial Deadline		Misturr Crawford	
Revised Deadline		% Completed	· ·	Chi Kit Wong	
Immediate Respondents	Please select users		· · · · · · · · · · · · · · · · · · ·		
Keywords				····[] Julia Wong	
Initiated By	Charlotte Bataller  This field cannot be modified once you s	save this record.		Mark Gmail2 Franciscoedited	
+ Add attachments	move attachments Maximum 8MB per fil	e		René (QA) Wierenga	
		attachments here		ACS Philippines     ACS Philippines     ACS Philippines     ACS Philippines     ACS Universe	
(L				Twenty One	
	Save & New S	ave & Close Back			

- 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 <u>state bar</u>.
- 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.

+	Add	at	tach	me	nts		ŵ F	len	101	e	atta	ach	me	nts	5	Ma	xin	nui	m 2	251	ив	per	fil	e																		
						-	 			-				-		-													 			 		 	 	 	-		 -	 -		57
1																																										11
																																										ч
																				Dre	op ·	att	ach	me	ents	: he	re															нI.
																																										al.
1																																										
			-			-	 -	-		-										-					-		-	-	 -	-	-	 	-	 -	 -	 	-	-	 -	 -	-	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.



Access Rights	<b>48</b> 1
Type a name	x 🎍
CHINA - Shanghai	
Shunde Li	
GERMANY - Munich	
Nancy Hobbs	
INDIA - Bangalore	
Jowar Verma	
Parvati Shah	
Suresh Singh	
MEXICO - Mexico City	
UK - London	
USA - New York	
USA - San Francisco	
USA - Washington DC	

- 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 <sup>(3)</sup> icon to add the user group's members and negative <sup>(2)</sup> 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.

Access Rights		<b>48</b> 1
ha		x 🎍
8 Result/s Found.		
Charlotte Testing		
Hannah Schmidt		
Harry Williams		
🔲 He Zhang		
🔲 Hriday Guha		
🔲 Karan Basha		
Parvati Shah		
Richard Taylor		
Save Changes	Cancel Changes	

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.

Access Rights	<b>48</b> 1
Type a name 7 Result/s Found.	х 🤰
<ul> <li>Aditya Poojary</li> <li>Arpita Kapoor</li> <li>Harry Williams</li> <li>Hriday Guha</li> <li>Jowar Verma</li> <li>Oliver Smith</li> </ul>	
Olivia Jones     Save Changes   Cancel Changes	

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 <u>State Bar</u>.

Current (221)	Open (343) On-Hold	(45) Closed (	70) Archived (27) All (485) Action -			Add Action
Updated On	Updated By	AC ID	Action Title	Action Status	Moderators	Latest Deadline
Open						
29Aug2014	Rich Delavin	AC000222	are and close button 🚑 🚑 🚑 Testing using save and close button		Rich Delavin	20Apr2011
10Jul2014	Module Admin Johnrey Admin	AC000003	at 1 2 2 at TESTING -> BT000662 - TS001821 - (BR) No deadline field on Details Page in Action module		Melissa Rafols	29Jul2010
10Jul2014	Module Admin Johnrey Admin	AC000219	at 🗐 🖉 🦾 Testing Action via Automated Testing using save and close button		Rich Delavin	20Apr2011
10Jul2014	Module Admin Johnrey Admin	AC000082	at 3 🖉 🚠 Testing Action via Automated Testing using save and close button		Mark QA Francisco	20Feb2011
10Jul2014	Module Admin Johnrey Admin	AC000088	are 💷 🦾 Testing Action via Automated Testing using save and new button		Rich Delavin	20Feb2011
🔲 10Jul2014	Module Admin Johnrey Admin	AC000089	at 💶 🦣 Testing Action via Automated Testing using save and close button		Rich Delavin	20Feb2011
10Jul2014	Module Admin Johnrey Admin	AC000128	at 💈 🔊 🔚 Testing Bug Tracker via Automated Testing using save & close button		Rich Delavin	28Feb2011
10Jul2014	Module Admin Johnrey Admin	AC000005	testing -> BT000134 - S13 - ALL - newly added item not unread for another user		René (QA) Wierenga	
10Jul2014	Module Admin Johnrey Admin	AC000014	😫 🔊 🚋 Testing for deployment 2		Rich Delavin	
10Jul2014	Rich Delavin	AC000896	ACCT 🕅 🚑 🛛 4 🌄 Automated Testing: See Attachments, if any [00483]		erik fsx	18Jun2014
			I << Page 1 of 23 ▷> ▷I 10 ▼			Items 1 - 10 of 22:



#### 4.1. Summary Table Column Headers

Updated On	Updated By	AC ID	Action Title	Action Status	Moderators	Latest Deadline
,						

- 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 making 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-IP

1-N In progress

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

Barbara Miller	
Items	1 - 6 of 6
Barbara Miller,	/leimei Wang

- 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.

Current (6)	Open (6)	On-Hold (0)	Closed (3)	Archived (0)	All (9)

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

Ope	n									
	09Jun2014	Module Admin Charlotte	AC000005	💰 🔟 URGENT	🛛 🕄 Revise our NDA te	emplate	80	Suresh Singh	01Dec2009	
	05Sep2014	Arpita Kapoor	AC000010	🔟 🎤 🌄 Mob	ile phones for our	Sales Executives	70	Arpita Kapoor	28Jun2014	
	18Jun2014	Module Admin Charlotte	AC000009	🔝 🛛 Gadget 20	014			Mary Williams	07Dec2009	
	18Jun2014	Nancy Hobbs	AC00003	🔝 () Purchase	more software licens	ies (xL2871)	50	Arpita Kapoor	25Jul2014	
	03Nov2011	Mary Williams	AC000008	🔝 🛛 2009 Dece	ember - equipment p	ourchases		Suresh Singh	20Nov2009	
AC Ta M	etails 2000005 - Revise o Igs URGENT Imediate Respon				Comments	Topics Page size: 10 Change		Ac	id Comment	Access Rights V
Cr		v: Medium			Comment 2 by M	lary Williams on 19Nov2009 06:0	5 PM		<b>""</b>	
	Revised Deadlin	e: 01Dec2009			Joseph the change	have done a great deal even before t is you made to the template. We think changed. I will also raise the %compl	the new template is great.			
De	scription				Comment 1 by C	hris Jackson on 19Nov2009 02:05	5 PM		<b>"</b> "	
Z9 ch	i8, which correspor	d that there will be changed ds to the Corporate Law pact current NDA agreem	section. He sai	d the	loopholes in our cu	following closely the development of urrent template and made some chan			potential	



### 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.

Details				
	T004335 - S61 - ME - Link sent thru Send to		Comments Topics	
Teczo Users leads to an	unknown page	_		Add Comment
Tags				Add Comment
ENG2			I∢ ∢ 1 ▶ № Page size: 10 Change	
Immediate Responde	nts			(4 7)
Priority:	High		Comment 3 by René (QA) Wierenga on 17Sep2014 02:47 PM	
Revised Deadline:			Comment & another comment noticed this is done for development.	
Initial Deadline:	27Sep2014		QA please check, thanks!	
Description				
	the attached bug report gets beamed up to		Updated Status; Action Status: New to Pending Assigned To: Martin Chan to Richard Delavin (acs)	
trisap and Myteczo as we	sir?		Comment 2 by Martin Chan on 17Sep2014 02:31 PM	<b>""</b>
Thanks!			"post another comment" :D	
René Miscellaneous		0	Comment 1 by Martin Chan on 17Sep2014 02:03 PM	""
Department:	Engineering	9	already updated trisap with the fix for this	
	Please follow up	_	Last edited by Martin Chan on 17Sep2014 02:03 PM	
Action Status:			Last edited by Martin Chan on 1736p2014 02:03 PM	
% Completed:				
Follow Up:	No			
	René (QA) Wierenga	_		
	17Sep2014 10:43 AM			
Initiated By:	René (QA) Wierenga			
Updated By:	René (QA) Wierenga			
Updated On:	17Sep2014 02:47 PM			
Closed By:				
Closed On:				
State:	Open			
Keywords				
Assigned To:	Richard Delavin (acs)			
	René (QA) Wierenga	_		
Moderated By				
René (QA) Wierenga				
Update History List				
Attachments		0		
Archived Attachments	5	0		

#### 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.

	C
	0
#	Attached By
т	Charlotte Testing
т	Charlotte Testing
	c
	<u>0</u>
#	Attached By
1	Charlotte Testing
	T T #

- 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.

Atta	chments		٥
4	0		- 10
	Attachment	#	Attached By
	2014-05-21_10-53-37.png 42.60 KB	т	Charlotte Testing
	2014-05-23_17-35-21.png 40.71 KB	т	Charlotte Testing
Arcl	nived Attachments		0
4	0		
			<u>s</u>
	Attachment	#	Attached By
	2014-05-20_15-58-02.png 140.39 KB	1	Charlotte Testing
Arcl	2014-05-23_17-35-21.png 40.71 KB nived Attachments	T #	Charlotte Testing

• Confirm by clicking the "Yes" button through the alert message.

Teczo Ale	ert 🛛 🗶
	Are you sure you want to delete?
	Yes No



- 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.

Attachmer	nts		
	Attachment	#	Attached By
2014-0	5-21_10-53-37.png 42.60 KB	т	Charlotte Testing
2014-0	5-23_17-35-21.png 40.71 KB	т	Charlotte Testing
Archived /	Attachments		(
0 🖌			
			💽 🖸
	Attachment	#	Attached By
2014-0	5-20_15-58-02.png 140.39 KB	1	Charlotte Testing

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

Attachments			0
2 2			
			<b>I</b>
	Attachment	#	Attached By
2014-05-2	1_10-53-37.png 42.60 KB	т	Charlotte Testing
2014-05-23	3_17-35-21.png 40.71 KB	т	Charlotte Testing
Archived Atta	chments		0
0 2			<u></u>
	Attachment	#	Attached By
2014-05-20	0_15-58-02.png 140.39 KB	1	Charlotte Testing

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

Comments Topics	
	Add Comment
I ↓ ↓ Page size: 10 Change	
Comment 2 by Mary Williams on 19Nov2009 06:05 PM	""
Chris, Great! You have done a great deal even before the task emerged! I already discussed b Joseph the changes you made to the template. We think the new template is great. We will just those laws will be changed. I will also raise the %complete to 80%. Good work.	•
Comment 1 by Chris Jackson on 19Nov2009 02:05 PM	""
Mary, I have been following closely the development of that motion. I've already checked for s loopholes in our current template and made some changes. Please feel free to check.	ome of the potential
NDA_template_v3.4(WIP).doc 36.00 KB	

The Comment column includes two tabs:

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

Comment 3 by Oliver Smith on 27Nov2009 10:55 AM	<b>44 77</b>
The UK market is growing very fast. We received a few complaints regarding the choice of word ar words (e.g. aluminum vs aluminium) on our website. I suggest that we distinguish between English (UK) to avoid confusion/frustration for the customers. Once we have many languages, maybe we c portal page where customers can select their location and/or language preference so the content o be customized to their needs.	(US) and English an create a home
Comment 2 by Lucas Muller on 24Nov2009 11:10 AM	""
Shunde, Thanks! I would also suggest Spanish and French. Our financial report indicates that Span speaking countries account for 20% of our total sales revenue.	ish- and French-
Comment 1 by Shunde Li on 23Nov2009 01:47 PM	<b>""</b>
Japan is one of our most important target markets in the next few years. We should add Japanese	as an option.

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 <u>Topics</u> 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.

Þ
Access Rights
N R
S I I S
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### 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.

Comments	Topics	
		Add Comment
		🗖 Send to email
B <i>I</i> <u>U</u> <del>S</del> ≣ ≣		
		Update Status
+ Add attachments	Remove attachments	
+ Add attachments		Maximum 8MB per file
+ Add attachments		
+ Add attachments	Dr	Maximum 8MB per file
+ Add attachments	Dr Mark reco	Maximum 8MB per file
Add attachments	Dr	Maximum 8MB per file



### 6.1. Add a comment

ľ	Comments	Topics
Γ		
	I	ge size: 10 Chan

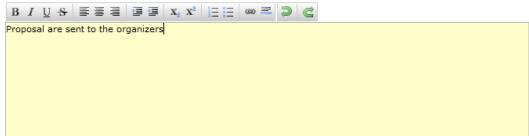
- 1. In the comment column you can see the "Add Comment" button. Clicking the button will open a comment box.
- 2. You can use the available editor to enter your comment.
- 3. You can also send your comment to other company users by checking the option to send to email.

To:	
Subject:	RE: AC000009 - Gadget 2009

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.

To:			
Subject:	Members are shown by default. Enter the name or email to search all users.		
BIU	Select All Members Clear All		
	🗖 Aditya Poojary (member) <aditya.poojary.13pb75@mp3thumb.com></aditya.poojary.13pb75@mp3thumb.com>	Â	
	Arpita Kapoor (member) <arpita.kapoor.13ez8d@mp3thumb.com></arpita.kapoor.13ez8d@mp3thumb.com>	ш	
	Barbara Miller (member) <barbara.miller.13y3t7@mp3thumb.com></barbara.miller.13y3t7@mp3thumb.com>		
	Charlotte Testing (member) <charlotte.teczo123@dispostable.com></charlotte.teczo123@dispostable.com>		
	Daniel Brown (member) <daniel.brown.13ai46@mp3thumb.com></daniel.brown.13ai46@mp3thumb.com>	-	
			1

- By default, the action item title is the subject. You can change the subject anytime.
   Subject: RE: AC000009 Gadget 2009
- 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.

+ Add attachments	🗑 Remove attachments	Maximum 25MB per file
1		۱
1	Drop	attachments here
Access Rights Upda	ate.xlsx 9.63 KB	0
L		<u></u>

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.

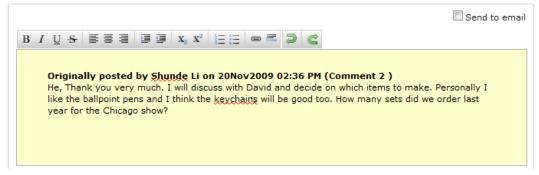
Mark record as unread for other members

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.



Thank you all for doing a good job in this event



3. You can also send your quoted comments to email by checking the option Send to email.. Comment 2 by Shunde Li on 20Nov2009 02:36 PM

	Send to e
o:	
Subject:	Re: AC000009 - Gadget 2009
BIU	·\$ 특별 별 별 I X₂ X² 드는 ∞ 트 ⊃ C
He, like	ginally posted by <u>Shunde</u> Li on 20Nov2009 02:36 PM (Comment 2) Thank you very much. I will discuss with David and decide on which items to make. Personally I the ballpoint pens and I think the <u>keychains</u> will be good too. How many sets did we order last ir for the Chicago show?

- 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

	Add Comment
	💷 💷
parties.	

- 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. Comment 3 by Charlotte Testing on 09Jun2014 09:47 AM

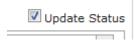
	Send to email
To:	
Subject: Re: AC000009 - Gadget 2009	
B I U S ≣ ≣ ≣ ≣ ≣ I X₂ X²   Ξ Ξ ∞ ≡ 🤀 🤮	
Thank you all for doing a good job in this event.	
Save Reset Close	



### 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.

				🗹 Upd	ate Status
Action Status	<select></select>	*	Assigned To	Charlotte Bataller	-

- 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.

#### Comment 1 by Charlotte Bataller on 23Sep2014 04:17 PM

Changing the owner and updating the status of this action item.

Updated Status: Action Status: No Value to Done Assigned To: Charlotte Bataller to René (QA) Wierenga



### 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:	Updated By: Module Admin MA000003			
Hadatad On: 02Nov2011 02:52 DM				

- 1. Clicking the "Edit" button will direct you to the Edit page. The fields are the same as the <u>Add</u> <u>page</u>.
- 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 ↔ ≣≣≣ ⊒	≣ x <sub>2</sub> x <sup>2</sup> \≟∃ ⊟ ∞ ≡ ⊃	C
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.

 Current (8)
 Open (8)
 On-Hold (0)
 Closed (1)
 Archived (1)
 All (10)
 Action

 Add Action

#### 8.1. State Headers

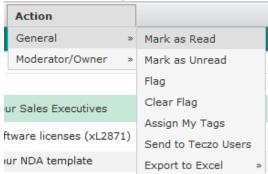


- Action items are grouped into different states such as Open, On-Hold, Closed, Archived and All. You can click the state headers to filter the items in the summary table aside from filtering through the <u>Advanced Search</u>.
- 2. The number besides the state name reflects the following:
  - a. Current (#) 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

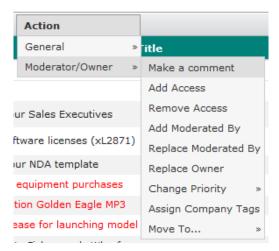
- f. Send to Teczo Users you can send one or more action items to other users in their messaging box and email.
  - Select the Send to Teczo Users link in the dropdown selection.

Subject:	Please see the action items linked below
Please review	the action items listed here.
	te en en de Marie de Marie de Carter de C
You are about	to send the following items:
	to send the following items: Mobile phones X AC000009 - Gadget 2009 X AC000003 - Purchase more software licenses (xL2871) X
AC000010 -	Mobile phones X AC000009 - Gadget 2009 X AC000003 - Purchase more software

- 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.



Notice	Step 2       Add a comment	
You are autho	prized to update the following item/s:	
AC000010 -	Mobile phones for our Sales Executives	
AC000003 -	Purchase more software licenses (xL2871)	
AC000006 -	Organize a day-trip to Fisherman's Wharf	
You are not a	uthorized to update the following item/s:	
AC000009 -	Gadget 2009	
AC000005 -	Revise our NDA template	
AC000008 -	2009 December - equipment purchases	
AC000007 -	UAT for sports edition Golden Eagle MP3	
AC000001 -	Prepare press release for launching model MP3 - Blue Robin	
		Next Clos

• After clicking the "Next" button, you will be directed to Step 2 – Add a comment where you can compose your message.

Step 1 Notice	Step 2 Add a comment
	$\exists \exists x, x^2 \mid \exists \exists \infty \exists 0 d$
For follow up on Monday.	
Mark record as unrea	d for other members
	Back Save Close

- 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.

Step 1 Notice	Step 2 Select User	$\rangle$	
You are autho	rized to update the follo	wing item/s:	
AC000010 - I	Mobile phones for our Sales	Executives	
AC000003 - I	Purchase more software lic	nses (xL2871)	
AC000006 - (	Organize a day-trip to Fishe	rman's Wharf	
'ou are not au	thorized to update the f	ollowing item/s:	
AC000009 - (	Gadget 2009		
AC000005 - I	Revise our NDA template		
AC000008 - 2	2009 December - equipmer	t purchases	
AC000007 - I	JAT for sports edition Gold	n Eagle MP3	
AC000001 - I	Prepare press release for la	unching model MP3 - Blue Robin	
			 Next Close
			Next Close

 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.



			Name	Office	
Name	Office				
A Supervisor	Tectonic Manila	*			
add new	MP3thumb USA				
Adward Norton	Tectonic Shenzen	=			
Again Another Engineer	MP3thumb USA				
Aiz Javierto	Tectonic Manila				
Alan Shen	Tectonic Shenzen				
Anne Marie Bermejo	Tectonic Manila				
Bryan Oab	Tectonic HongKong				
Canna Lau	Tectonic HongKong				
Char Gmail II	MP3thumb USA				
Char Lot Bataller	Tectonic Manila				
Chensong Chen	Tectonic HongKong				
Chiara Aina Nicole Javan	Tectonic Manila				
Denny Wong (UAT)	Tectonic HongKong				
EricVC Clapton	Tectonic HongKong				
Fairie Faith Flores	Tectonic Manila	*			

- 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.

Action			
General »	itle		%C
Moderator/Owner »	Make a comment		
	Add Access		
ur Sales Executives	Remove Access		70
	Add Moderated By		
ftware licenses (xL2871)	Replace Moderated By		0
ur NDA template	Replace Owner		80
equipment purchases	Change Priority »	High (H)	
tion Golden Eagle MP3	Assign Company Tags	Low (L)	
ease for launching model	Move To »	Medium (M)	
e et l'anne e			

- 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.

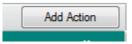


	Send to email
3 I U S ≣ ≣ ≣ I I I I I I I I I I I I I I I I	
one, good job!	
Mark record as unread for other members	
	Back Save Clos

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 <u>add an action item</u>. 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

Search AC	Go Quick Search			Search	Reset 🕜			Basic Search 🛠
State	Open 💌	Department	All	*	Action Required	□ 🕜		
Priority	All	Status	All	-	Person	All	▼ All	Ŧ
Action Status	All	Action Type	All	-	Date	All	▼ All	-
My Tag	All	Company Tag	All	-				

#### 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.

AC ID	Go

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.

Quick Search		Search	Reset
	 A 11		_

#### 9.2. Advanced Search

State	Open	Ŧ	Department	All	Ψ	Action Required				
Priority	All	*	Status	All	*	Person	All	*	All	*
Action Status	All	Ψ.	Action Type	All	*	Date	All	*	All	*
My Tag	All	*	Company Tag	All	*					

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.

Action	Required	8

- 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?

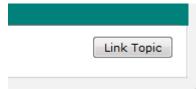
Users with edit rights to an action item (Owner, Moderator or Module Administrator) can link one or more related topics to that action item.

#### 10.1. Link topics from other modules

1. Go to the Topics tab in the comment column.

Comments	Topics
	-
No records found.	

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.

Step 1 Select Module	Select Topics		
General			
Action			
Compa	y Bulletin		
Forum			
🔘 New Ide	as		
🔘 Standar	Operating Procedures (SOP)		
Operation	, HR, Finance		
C Employ	e Records		
© Quality			
Product D	velopment		
🔘 Bug Tra	ker		
Certific	te Tracking		
Product	Change Tracking		
Product	Development Tracking		
Product	on Tracking		
Project	lanagement		
Technic	l Support Center		
Sales and	Marketing		
Channe	Management		
		Next	los

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

1	Vext	:	C
1	Vext		C

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.

			ID	Title		
ID	Title					
AC000001	Contact Microsoft representative	•				
AC000002	Update the meeting notes	Ξ				
AC000003	Purchase of Office Equipment					
AC000004	Print samples of the brochures					
AC000005	Proofread User Manuals					
AC000006	SOP Documents					
AC000007	Order of Times Magazine					
AC000008	Updated Pricelist of ID Card Printers2					
AC000009	Updated Web Content					
AC000010	Request for available equipments.					
AC000011	Purchase 20 17" LCD Monitor					
AC000012	List of Leads from Saas 2008 Summit Event					
AC000013	Business Cards for Paul Chen1	-				



You can use the type and search functionality to filter the list.

so	
ID	Title
AC000001	Contact Microsoft representative
AC000006	SOP Documents
AC000043	Consolidate the applications for Application Softwar

6. Click the "Save" button to link the topics.



7. Related topics will now be displayed in the tab's summary table.

Comments	Topics	
		Link Topic
ID	Title	Moderators
Action		
AC001056	Action for FR000549 - Demo Topic	Charlotte Bataller
3 Forum		
FR000549	Demo Topic	Charlotte Bataller
💼 Delete Link	I⊲ << Page 1 of 1 ⇒> ⊳I 20 -	Items 1 - 2 of

#### 10.2. Removing linked topics

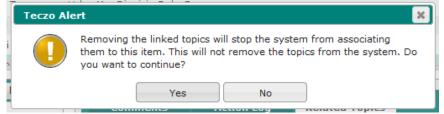
1. Select one or more related topics to be removed by checking the box in the first column of the row.



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

ŧ	Delete	Link

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





### 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.

Comments	Actions	Topics		
Quick Search			Search Reset	Advanced Search ¥
Current (0) Ope	en (0) On-Hold (0)	All (0)		Add Action

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

Commen	ts	Actions	Topics		
Quick Search				Search Reset	Advanced Search
Current (0)	Open (0)	On-Hold (0	I) All (0)		Add Action

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.



Drop attachments here  Drop attachments here  Save & Close  Close Close Close Close  Close  Close  Close Close Close Close Close Close Close Close Close Close Close Close Close Close C	B I U S I S X X I I III III IIII IIIIIIIIII	Add Action				Access Rights	8. 1
Description   State   Open   Priority   High   Coastate   Description   Description   Coastate   Description   Description   Coastate   Description	Description     Description     Core restabilit     State   Operations   State   Operations   Select>         Priority   High         Priority   High      Priority   High      Priority   High      Priority   High      Priority   High    Priority   High    Priority   High    Priority   High    Priority   High    Priority High    Priority High <th>Action Title</th> <th>Action for FR000549 - Demo Topic</th> <th></th> <th></th> <th>Type a name</th> <th>c 🙎</th>	Action Title	Action for FR000549 - Demo Topic			Type a name	c 🙎
Description         Description         State       Oem         Pepartment       Select>         Action Type       Select>         Action Type       Select>         Moderated Bv       Carlotte Bataller         Owner       Carlotte Bataller         Conner       Follow Up         Revised Devaluation       Select>         Immediation       Select>         Revised Devaluation       Select>         Immediation       Select>         Revised Devaluation       Select>         Immediation       Select>         Passe select users       Select>         Immediation       Select>         Passe select users       Select>         Immediation       Select>         Passe select users       Select>         Department       Select>         Passe select users       Select>         Immediation       Passe select users         Immediation       Passe select users         Department       Revised Devaluation the modified oncory us users this record.         Passe Select       Close         Department       Revised Devaluation the modified oncory users this record.         Passe Select	Bescription     Description     Description     State     Open     State		B I U S = = = = = x, x <sup>2</sup>			100-Acre-Wood	
Description   State   Opertment   Select>   Action Type   Select>   Action Type   Select>   Moderated By   Charlotts Bataller   Follow Up   Owne   Charlotts Bataller   Follow Up   Owne   Charlotts Bataller   Woderated By   Charlotts Bataller   Follow Up   Owne   Charlotts Bataller   Wark   This field cannot be modified once you save this record.   * Add attachments   Remove attachments   Sine & Close   Close               Dep stachments here                     Dep stachments here	Description   State   Open   Priority   High   Openrement   Select>   Select>   Moderated w   Cheriotte Bataller   Inmediate   Select   Worderated w   Cheriotte Bataller   Inmediate   Hease select users   Inmediate   Revised Deadline   Inmediate   Hease select users   Intitiad by   Cheriotte Bataller   Intitiad by   Intitiad by <td></td> <td></td> <td></td> <td></td> <td> Cute Test Rabbit</td> <td></td>					Cute Test Rabbit	
Description   State   Oppartmet   Select>   Object   State   Select>   Select>   Action status   Select>   Owner   Charlotte Bataller   Charlotte Bataller   Timmediate   Revised Deadline   Pease select users   Timmediate   Respondent   Responde	Description   State   Open   Priority   High   Department <select>   Action Type   <select> <action td="" type<=""> <select></select></action></select></select></select></select></select></select></select></select></select></select></select></select></select></select></select></select></select></select></select>					Mikasa Ackerman	
State Open   Priority High   Department Select>   Action Type Select>   Moderated By Charlotte Bataller   Owner Charlotte Bataller   Convertion Select   Woderated By Charlotte Bataller   Initial Deadline Select   Wichael Bataller Initial Deadline   Seve Science Select   Initiated By Charlotte Bataller   Very ords Charlotte Bataller   Initiated By Charlotte Bataller   Initiated By Charlotte Bataller   Very ords Seve Science   Seve & Close Close	State Open Priorit High Image: Action Statu Action Statu Select> Image: Action Statu Action Statu Action Statu Action Statu Image: Action Statu <					ACS Africa	
State Open   Departmet Cselect>   Action Type Cselect>   Koderated by Charlotte Bataller   Charlotte Bataller % Completed   Winderated by Charlotte Bataller   Keyverds Seelect   Keyverds Charlotte Bataller   Keyverds Keyverds   Keyverd	State Oen   Oen Priority   High Castion   Oenarited Baselier Assigned To   Action Type Select>   Moderated By Cantotte Baselier   Moderated By Cantotte Baselier   Minitade By Cantotte Baselier   Initiade By Cantotte Baselier   Mark Gaminer Maximum BMB per file   Dep attachments Remove attachment Maximum BMB per file   Dep attachments here   Dep attachments here   Saxe & Close   Close   Mark Antiony Oless   Mark Antiony Oless   Mark Antiony Oless   Mark Antiony Oless	Description				Mark82ph 3	
State Open   Department <	State Open Priority High   Department Select> Assigned To Select>   Action Type Select> Action Statu Select>   Moderated By charlotte Bataller  Follow Up Imediate   Covmer charlotte Bataller  Follow Up Imediate   Revised Deadline Imediate Imediate Imediate   Imediate Bataller  Initiate Deadline Imediate   Imediate Bataller Imediate Imediate Imediate   Imitiated By Charlotte Bataller Imediate Imediate   Imitiate Bataller Imediate Imediate Imediate   Imediate Abuments Remove attachments Maximum BMB per file Imediate   Imediate Abuments Imediate Imediate Imediate   Imediate Abuments Save & Close Close Imediate   Imediate Abuments Imediate Imediate Imediate   Imediate Abuments Imediate Imediate Imediate   Imediate Abuments Imediate Imediate Imediate </td <td></td> <td></td> <td> Michael Banting</td> <td></td>			Michael Banting			
State Oren Priority Figh Cariota   Action Type Celect> Action Stats Celect> Celect>   Moderated By Charlotte Bataller Follow Up Immediate   Revised Deadline Immediate Immediate Immediate   Charlotte Bataller Immediate Immediate Immediate   Places select users Immediate Immediate Immediate   Charlotte Bataller Immediate Immediate   Charlotte Bataller Immediate Immediate   Charlotte Bataller Immediate Immediate   Initiated By Charlotte Bataller Immediate   Initiated By Charlotte Bataller Immediate   Initiated By </td <td>State open   Department Select&gt;   Action Typ Select&gt;   Action Typ Select&gt;   Moderated Bp Charlotte Bataller   Commer Charlotte Bataller   Immediatis Please select users   Revised Deadline    Immediatis Please select users   Keywords    Initiated Bp Charlotte Bataller   Init</td> <td></td> <td></td> <td></td> <td></td> <td> Miles Edgeworth</td> <td></td>	State open   Department Select>   Action Typ Select>   Action Typ Select>   Moderated Bp Charlotte Bataller   Commer Charlotte Bataller   Immediatis Please select users   Revised Deadline    Immediatis Please select users   Keywords    Initiated Bp Charlotte Bataller   Init					Miles Edgeworth	
Stat Open v Priority igh v   Department  Assigned To Select> v   Action Type Select> v Action Status Select> v   Moderated By Charlotte Batalier v filled imach   Revised Deadline v v imach imach   Immediate Please select users v v Action Type imach   Respondents Please select users v v imach imach   Keywords imach imach v v imach imach   Initiated By Charlotte Batalier v v v imach   This field cannot be modified once you save this record. v well test imach   Crop attachments Maximum BMB per file imach imach imach   Drop attachments here imach imach imach imach   Save & Close Close imach imach imach   Mark Attachments Maximum AMB imach imach imach   Mark Attachments Maximum AMB imach imach imach   Mark Deta Close imach imach imach   Mark Attachments Maximum AMB imach imach imach   Mark Attach Mark Attach imach imach imach   Mark Attach Mark Attach imach imach imach   Mark Attach Mark Attach imach imach imac	State Open w Priority High w   Department <					test test	
Department       Cselect>        Assigned to         Action Type       Cselect>           Moderated Bp       Charlotte Bataller           Owner       Charlotte Bataller           Revised Deadline            Revised Deadline             Mistur Crawford              Revised Deadline	Department       Select>       Assigned To       Select>       acrich1         Action Type       Select>        acrich2         Moderated By       Charlotte Bataller        Immediate         Owner       Charlotte Bataller       Initial Deadline          Revised Deadline         Misture Crawford         Revondente             Keywords              Initiated By       Charlotte Bataller              Keywords <t< td=""><td>State</td><td>Open</td><td>Priority</td><td>High</td><td>ACS Holland</td><td></td></t<>	State	Open	Priority	High	ACS Holland	
Action Type Select   Moderated by Charlotte Bataller   Owner Charlotte Bataller   Charlotte Bataller Initial Deadline   Revised Deadline Immediate   Respondents Please select users   Initiated by Charlotte Bataller   This field cannot be modified once you save this record.   Add attachments   Remove attachments Maximum BMB per file   Drop attachments here   Drop attachments here   Save & Close   Close   Mark QA Francisco   Mark QA Francisco   Mark QA Francisco   Mark QA Francisco	Action Type       Select>       Action Status       Select>       Mark 7 Franisco         Moderated By       Chariotte Bataller        Initial Deadline       Imark 7 Franisco       Mark 7 Franisco         Revised Deadline          Acts Hong Kong       Mark 7 Franisco         Immediate Respondents       Rese select users         Julia Wong       Mark Gomail 2 Franisco         Keywords       Charlotte Bataller         Julia Wong       Mark Franisco         Action tibe modified once you save this record.        Mark Teranisco       René (QA) Wierenga         Well test       Acts Philippines       Biance Cabingan       Biance Cabingan       Biance Cabingan         Bryan Oab       Charlotte Bataller        Johnery Angolluan       Mark Anthony Olae         Johnery Angoluan       Mark Anthony Olae       Mark Anthony Olae       Mark Anthony Olae       Mark Anthony Olae         Mark Olae       Charlotte Bataller        Mark Anthony Olae       Mark An				- ng.		
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read only							
- Rebie Estares							

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.

Comments	Actions	Topics		
Quick Search			Search	Reset Advanced Search &
Current (1)	Open (1) On-Hold (0	) All (1)		Add Action
Deadline	Action Title	Actio	n Type Action	Status Assigned To
Open				
30Sep2014 🏾 🍕	Action for FR000549 -	Demo Topic FOLLOW	UP 1-NW	René (QA) Wierenga
	Lef.	Page 1 of 1	> ⊳⊧ 10 👻	Items 1 - 1 of 1



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.

Search AC	Go	Quick Search		Search Reset ?		Δ	dvanced Search
Current (3) Op	en (763) On-Hold	(83) Closed	(121) Archived (41) All (1008)	Action -			Add Action
Updated On	Updated By	AC ID	Act	ion Title	Action Status	Moderators	Latest Deadline
Dpen							
11:35 AM	Charlotte Bataller	AC001056	🗓 🚋 🚎 🔊 Action for FR00054	9 - Demo Topic	1-NW	René (QA) Wierenga	30Sep2014
15May2012	Rich Delavin	AC000532	test			Rich Delavin	
14May2012	Rose Purugganan	AC000493	a Sample Text <select> Sample</select>			Rose Purugganan	01May2012
			IN STATES	of 1 🗁 🖻 10 👻			Items 1 - 3 of

#### **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.

ACTIVIT STATUS	<pre><select></select></pre>
Follow Up	☑ ?

- 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.



Current (8) Oper	<b>n (8)</b>   On-Hold (0)   C	Closed (1) Arc	hived (1)   All (10)   Action -			Add Action
🔲 Updated On 🜩	Updated By	AC ID	Action Title	%Cmp	Moderators	Latest Deadline
)pen						
11:22 AM	Module Admin admin	AC000005	孝 🔟 🔽 🕼 Revise our NDA template	80	Suresh Singh	01Dec2009
11:22 AM	Module Admin admin	AC000003	🔟 🛿 💉 Purchase more software licenses (xL2871)	0	Charlotte Testing	04Dec2009
11:22 AM	Module Admin admin	AC000009	🔟 🛿 🖉 🔗 Gadget 2009		Mary Williams	07Dec2009
03Nov2011	Module Admin MA000003	AC000010	Mobile phones for our Sales Executives	70	Charlotte Testing	04Dec2009
03Nov2011	Mary Williams	AC000008	🔟 🛿 2009 December - equipment purchases		Suresh Singh	20Nov2009
20Nov2009	He Zhang	AC000007	🖽 🛿 🦣 UAT for sports edition Golden Eagle MP3	40	Hriday Guha	24Nov2009
20Nov2009	He Zhang	AC000001	🔟 🛿 🎧 Prepare press release for launching model MP3 - Blue Robin		David Jones	15Dec2009
20Nov2009	Charlotte Testing	AC000006	🔲 🌄 Organize a day-trip to Fisherman's Wharf	90	Barbara Miller	31Dec2009
			IN IN Page 1 of 1 IN IN TO V			Items 1 - 8 of

teczo.com

### Definitions of the Notifications Icons

lcon	Meaning	Icon disappears
ş	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
0	The action item has one or more attachments	When all attachments have been removed
NEWF	The action item is a newly created action item	3 days after the action item was created
ø	Changes have been made to the details of this action item	When you view the action item details
1	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
4	You have been added to the action item	When you view the action item details
4	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



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