



Action

User Guide

V4.0

Table of Contents

| | | |
|-------------|-----------------------------------|----------|
| 1.0. | Module Overview | 3 |
| 2.0. | Using the Module..... | 4 |
| 2.1. | Action Summary Page | 4 |
| 2.1.1. | Action Filter and Search..... | 4 |
| 2.1.2. | Action Summary Table | 6 |
| 2.2. | Action Details..... | 7 |
| 2.2.1. | Add/Edit Action and Comments..... | 9 |

Figures

| | | |
|------------------|-----------------------------|---|
| Figure 1: | Action Default Page | 4 |
| Figure 2: | Default Summary Table | 6 |
| Figure 3: | Add Action Item..... | 9 |

Tables

| | | |
|-----------------|---|---|
| Table 1: | Definition of Terms Used in the Action Filter: Advanced Search Mode | 5 |
| Table 2: | Definition of Terms Used in the Action Summary Table | 7 |
| Table 3: | Definition of Terms Used in the Action Details | 9 |

1.0. Module Overview

Companies spend a significant amount of time and effort in meetings, decision making and organizational planning to determine the necessary courses of action for meeting certain objectives. In this regard, respective teams or team members are assigned the completion of action items, which are ad-hoc tasks requiring follow-up execution. In tracking the progress of these action items, most companies use traditional mediums as spreadsheets, e-mail correspondences and paper documents. However because of the limited nature of these mediums, records are sometimes lost and action items are not followed up properly. Hence, monitoring the progress of projects using such methods is rendered inefficient.

Teczo.com Online Business Solutions strives to improve your company's performance by offering the Teczo Action module, which provides a centralized platform for tracking the progress of action items. This module keeps your action items in one place, enabling organizational departments to benefit from the exercise of proper planning, scheduling, and delegation of jobs to their respective members.

This section contains the descriptions of the unique features and user interfaces of the Action module, as well as its corresponding terminologies.

2.0. Using the Module

2.1. Action Summary Page

Upon clicking the Action link, the user will be directed to the Action Summary Page, which mainly contains the Action Filter and Summary Table.

| Updated On | Updated By | AC ID | Action Title | Dept | %Cmp | P | Initiated By | Assigned To | Latest Deadline |
|-----------------|----------------|----------|--|------|------|---|----------------|----------------|-----------------|
| Open | | | | | | | | | |
| 20Nov09 | Lucas Müller | AC000008 | 2009 December - equipment purchases | IT | | M | Mary Williams | Harry Williams | 20Nov09 |
| 20Nov09 | Barbara Miller | AC000003 | Purchase more software licenses (xl2871) | IT | 0 | L | Barbara Miller | Suresh Singh | 04Dec09 |
| 20Nov09 | David Jones | AC000010 | Mobile phones for our Sales Executives | SLS | 70 | M | David Jones | Harry Williams | 04Dec09 |
| 20Nov09 | Shunde Li | AC000009 | Gadget 2009 | MKT | | H | David Jones | He Zhang | 07Dec09 |
| 20Nov09 | He Zhang | AC000007 | UAT for sports edition Golden Eagle MP3 | MKT | 40 | H | Hriday Guha | Jowar Verma | 24Nov09 |
| 20Nov09 | He Zhang | AC000001 | Prepare press release for launching model MP3 - Blue Robin | MKT | | M | David Jones | He Zhang | 15Dec09 |
| 20Nov09 | Michael Smith | AC000006 | Organize a day-trip to Fisherman's Wharf | HRA | 90 | L | Michael Smith | Barbara Miller | 31Dec09 |
| 19Nov09 | Mary Williams | AC000005 | Revise our NDA template | LAW | 80 | M | Mary Williams | Chris Jackson | 01Dec09 |
| Closed | | | | | | | | | |
| 20Nov09 | Mary Williams | AC000004 | Changes to be made on the MP3 - Black Hawk brochure (Chinese Version). | MKT | 100 | H | Mary Williams | | 26Nov09 |
| Archived | | | | | | | | | |
| 20Nov09 | Matthew Davis | AC000002 | Generate a List of Clients for Christmas Giveaways | SLS | 100 | M | Matthew Davis | Olivia Jones | 25Nov09 |

Figure 1: Action Default Page

2.1.1. Action Filter and Search

The table contains the description of terms used in the Action Filter.

| TERM | DESCRIPTION |
|--------------|--|
| AC | Action ID A unique action item number |
| Quick Search | Allows the user to enter keywords of any character string, except date-type keywords |
| State | Indicates the state of the action item Values: <i>(Default Value: All)</i> <ul style="list-style-type: none"> All Open On-hold Closed Archived |
| Priority | Indicates the priority level of the action item Values: <i>(Default Value: All)</i> <ul style="list-style-type: none"> All High Medium Low |

| | |
|------------|---|
| Department | <p>Indicates the department concerned with the action item</p> <p>Values: <i>(Default Value: All)</i></p> <ul style="list-style-type: none"> • All (departments) • List of departments |
| Status | <p>Indicates the current status of the action item</p> <p>Values: <i>(Default Values: All checked)</i></p> <ul style="list-style-type: none"> • Read • Unread • Flag |
| Date | <p>Allows users to search for action items within a specific date range</p> <p>Values: <i>(Default Value: All)</i></p> <ul style="list-style-type: none"> • All (instances) • Submitted On • Updated On • Closed On • All (days) • Today • Last 7 days • Last 30 days • Last 90 days • Last 360 days |
| Person | <p>Allows users to search for action items involving specific persons</p> <p>Values: <i>(Default Value: All)</i></p> <ul style="list-style-type: none"> • All (roles) • Initiated By • Assigned To • Action Member • Immediate Respondent • Updated By • Closed By • Submitted By • All (persons) • List of users |

Table 1: Definition of Terms Used in the Action Filter: Advanced Search Mode

2.1.2. Action Summary Table

The Action Summary Table displays all the action items where users have access rights.

| All (10) Open (8) On-Hold (0) Closed (1) Archived (1) Action More Actions Add Action | | | | | | | | | | |
|--|------------|----------------|----------|--|---------------------------|------|---|----------------|----------------|-----------------|
| | Updated On | Updated By | AC ID | Action Title | Dept | %Cmp | P | Initiated By | Assigned To | Latest Deadline |
| Open | | | | | | | | | | |
| <input type="checkbox"/> | 20Nov2009 | Lucas Müller | AC000008 | 2009 December - equipment purchases | Information Technology | | M | Mary Williams | Harry Williams | 20Nov2009 |
| <input type="checkbox"/> | 20Nov2009 | Barbara Miller | AC000003 | Purchase more software licenses (xL2871) | Information Technology | 0 | L | Barbara Miller | Suresh Singh | 04Dec2009 |
| <input type="checkbox"/> | 20Nov2009 | David Jones | AC000010 | Mobile phones for our Sales Executives | Sales | 70 | M | David Jones | Harry Williams | 04Dec2009 |
| <input type="checkbox"/> | 20Nov2009 | Shunde Li | AC000009 | Gadget 2009 | Marketing | | H | David Jones | He Zhang | 07Dec2009 |
| <input type="checkbox"/> | 20Nov2009 | He Zhang | AC000007 | UAT for sports edition Golden Eagle MP3 | Marketing | 40 | H | Hriday Guha | Jowar Verma | 24Nov2009 |
| <input type="checkbox"/> | 20Nov2009 | He Zhang | AC000001 | Prepare press release for launching model MP3 - Blue Robin | Marketing | | M | David Jones | He Zhang | 15Dec2009 |
| <input type="checkbox"/> | 20Nov2009 | Michael Smith | AC000006 | Organize a day-trip to Fisherman's Wharf | Human Resources and Admin | 90 | L | Michael Smith | Barbara Miller | 31Dec2009 |
| <input type="checkbox"/> | 19Nov2009 | Mary Williams | AC000005 | Revise our NDA template | Legal | 80 | M | Mary Williams | Chris Jackson | 01Nov2009 |
| Closed | | | | | | | | | | |
| <input type="checkbox"/> | 20Nov2009 | Mary Williams | AC000004 | Changes to be made on the MP3 - Black Hawk brochure (Chinese Version). | Marketing | 100 | H | Mary Williams | Mary Williams | 26Nov2009 |
| Archived | | | | | | | | | | |
| <input type="checkbox"/> | 20Nov2009 | Matthew Davis | AC000002 | Generate a List of Clients for Christmas Giveaways | Sales | 100 | M | Matthew Davis | Olivia Jones | 25Nov2009 |

Page 1 of 1, items 1 to 10 of 10

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Figure 2: Default Summary Table

A. Terminology

The table contains the description of terms used in the Summary Table.

| TERM | DESCRIPTION |
|-----------------------|--|
| Default Fields | |
| Updated On | Indicates the date when the action item was last updated |
| Updated By | Indicates the name of the last user who updated the action item |
| AC ID | Action ID A unique action item number |
| Action Title | Title of action item |
| Dept (Department) | Indicates the department code of the department concerned with the action item |
| %Cmp (% Completed) | Indicates the completion status of the action item in percentage |
| P (Priority) | Indicates the priority code of the action item Values: <ul style="list-style-type: none"> • H - High • M - Medium • L - Low |
| Initiated By | Indicates the name of the user who requested the action |

| TERM | DESCRIPTION |
|-----------------|---|
| Assigned To | Indicates the name of the user to whom the execution of the action item is assigned |
| Latest Deadline | Indicates the date when the completion of the action item is due |

Table 2: Definition of Terms Used in the Action Summary Table

B. Summary Table

A user is only allowed to view all the action items where he or she has access rights. By default, the user can view the summary table with the following fields:

- Updated On
- Updated By
- AC ID (Action ID)
- Action Title
- Dept (Department)
- %Cmp (% Completed)
- P (Priority)
- Initiated By
- Assigned To
- Latest Deadline

Note: Other general features of the summary page are documented in Section 3.0. of the Essential Features User's Guide.

2.2. Action Details

The table contains the definition of terms used in the Details portion of each action item:

| TERM | DEFINITION |
|-----------------------|--|
| AC ID | Indicates the Action ID and its corresponding Action Title |
| Immediate Respondents | Indicates the names of the users who are asked to respond immediately to the action item |
| Priority | Indicates the priority level of the action item Values: <ul style="list-style-type: none"> • High • Medium • Low |

| TERM | DEFINITION |
|------------------|--|
| Revised Deadline | Indicates the most recent deadline set for the completion of the action item |
| Initial Deadline | Indicates the original deadline set for the completion of the action item |
| Description | Contains the description of the action item |
| Attachments | Displays the file name of any file/s uploaded as an attachment to the action item |
| Department | Indicates the department concerned with the action item Values: <ul style="list-style-type: none"> • List of departments |
| % Completed | Indicates the progress status of the action item |
| Submitted By | Indicates the name of the user who posted and assigned the action item |
| Submitted On | Indicates the date when the action item was posted and assigned |
| Initiated By | Indicates the name of the user who requested the action item |
| Updated By | Indicates the name of the last user who updated the action item |
| Updated On | Indicates the date when the action item was last updated |
| Closed By | Indicates the name of the user who closed the action item |
| Closed On | Indicates the date when the action item was closed |
| State | Indicates the state of the action item Values: <ul style="list-style-type: none"> • Open • On-hold • Closed • Archived |
| Keywords | Contains keywords relevant to the action item |
| Assigned To | Indicates the name of the person to whom the execution of the action item is assigned |

| TERM | DEFINITION |
|---------------------|--|
| Update History | Indicates recent changes made on the details of the action item <ul style="list-style-type: none"> Last Update – Date and time when details were last updated or edited Fields – Fields that were edited or changed on the latest update |
| Update History List | Link to view the update history list of all the changes made in the action item details |
| Attachments | Displays the file names of files uploaded as attachments to the action item |
| Comments | Comments added by users who have access rights to the action item |
| Quote | Quoted statements taken from a user’s particular comment |
| Access Rights | Indicates the list of users who are allowed to access the action item |

Table 3: Definition of Terms Used in the Action Details

Note: Other general features of the details portion of an action item are documented in Section 4.0 of the Essential Features User’s Guide.

2.2.1. Add/Edit Action and Comments

The Module Administrator, Submitter, Initiator and Assignee can edit all the fields indicated in the Edit details page of a technical issue.

The full features of the Add/Edit Action and Comments sections are documented in the Essential Features User’s Guide, parts A and B of Section 5.0, respectively.

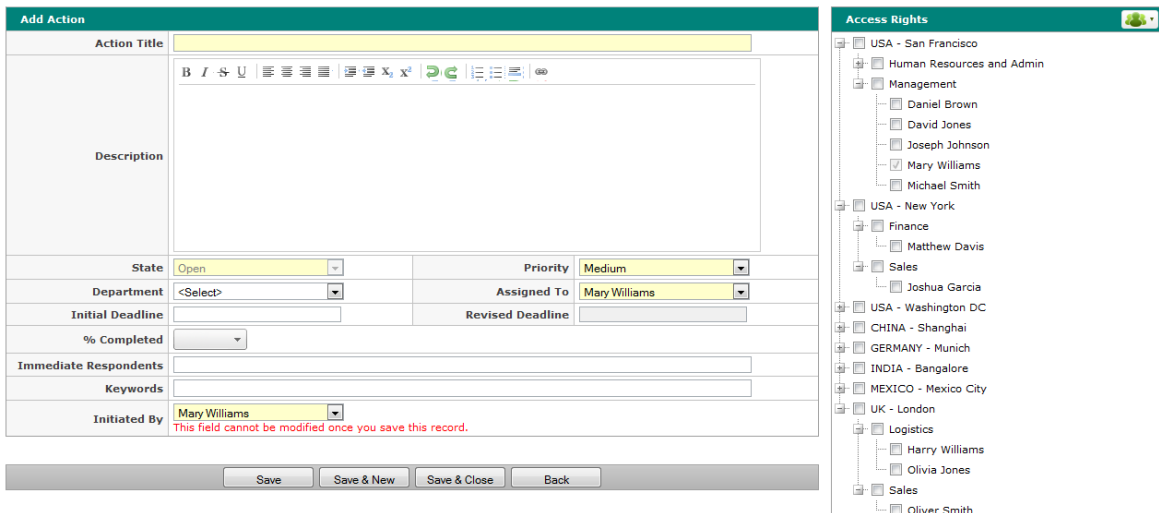


Figure 3: Add Action Item