

Teczo Essential Features

User Guide

V3.00

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1.0. Sign In to Teczo.com

Users can access Teczo.com's enterprise collaboration platform by typing <https://www.myteczo.com> in the navigation bar of compatible web browsers, namely, Firefox and Internet Explorer versions 7 and up. This would direct users to the User Login page shown below.

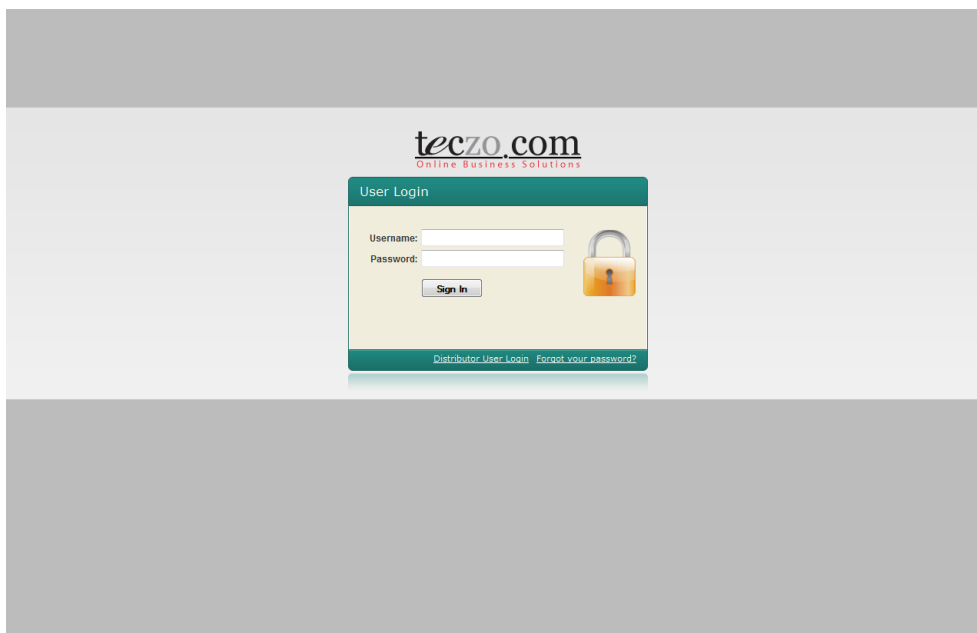


Figure 1: User Login Page

- A. When logging in for the first time, users can access the modules in Teczo.com's enterprise collaboration platform by inputting the login credentials provided to them by the system administrator via email:
 1. Key in the user's e-mail address in the Username field
 2. Key in the user's password in the Password field
 3. To complete sign in, simply click the Sign In button
- B. After logging in for the first time, users can change the system-generated password with a personal password. For security purposes, users are advised to have easy-to-remember but strong and unique personal passwords containing a combination of uppercase and lowercase letters, numbers and symbols.
- C. Only the System Administrator can change the Username upon the user's request.
- D. To ensure that a real person is attempting login, a challenge-response test or Captcha is prompted after the third failed attempt of entering the correct password. Upon seeing this, the user needs to type in the correct password and the exact Captcha characters to successfully login to the system. The Captcha characters are not case sensitive and are inputted in the box below the provided Captcha characters, as shown in Figure 2.



Figure 2: Captcha

- E. Besides prompting the challenge-response test or Captcha on the third failed attempt of entering the correct password, the system also sends the user an email to notify him of such failed attempts to login to the system.
- F. In case a user wants to reset his password, he must click the “Forgot your password?” link located on the lower right corner of the login box, as shown in Figure 3.



Figure 3: Forgot Your Password

- G. Upon clicking the link, the user will be directed to the “Forgot your password?” page where he will be asked to provide and submit his registered e-mail address by clicking the Submit button. The system will then generate an automated email providing the user with a password verification link, which the user needs to click for confirmation. Upon confirming the password verification link, the user will receive a new e-mail containing his username and password. In case the user does not receive an email containing the password verification link, he can request for technical support by sending an e-mail to support@teczo.com.



Figure 4: *Forgot Your Password Page*

2.0. Teczo.com Home Page

2.1. Teczo.com Home Page Interface

Once logged in, the user is directed to the Home Page of Teczo.com, which mainly contains the Dashboard, as shown below.

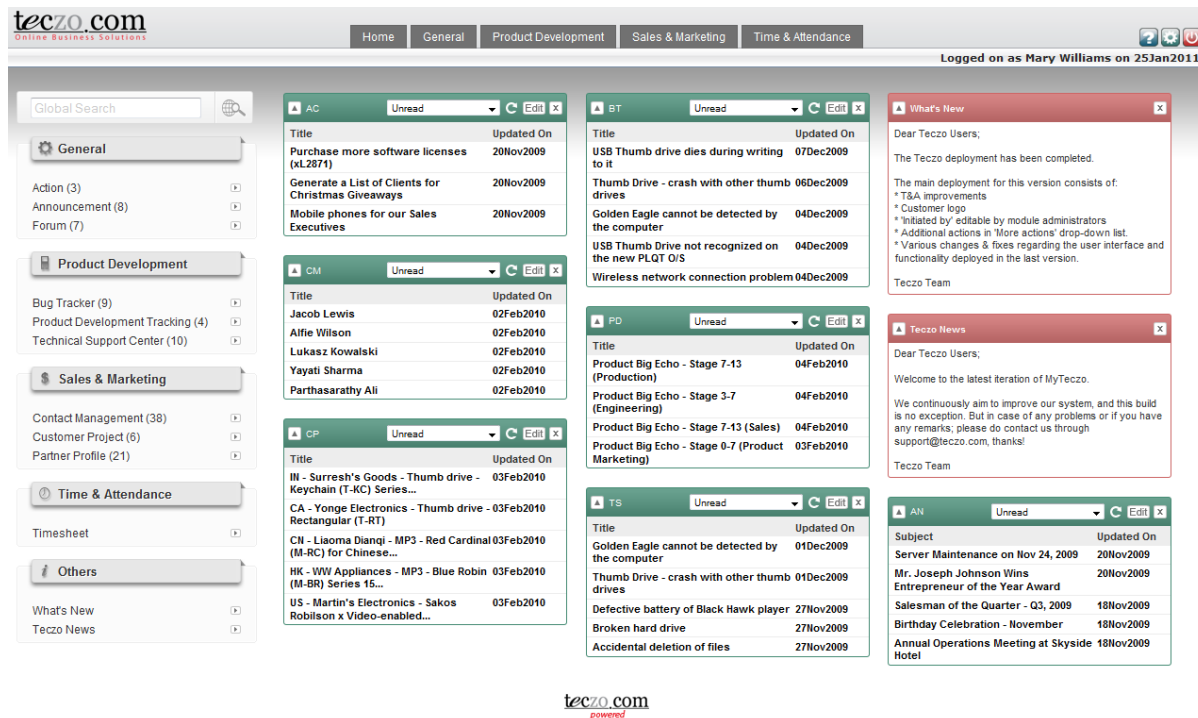


Figure 5: Teczo.com Home Page

Figure 6:

The interface is very easy to use and contains the features described in the following sections of this guide.

A. Menu Bar

- The Menu Bar consists of tabs found at the top of the Teczo.com home page. Excluding the Home tab, the tabs contain the Teczo.com modules grouped in respective categories, namely, General, Product Development, Sales & Marketing, Operations & Admin, Time & Attendance and System. Note that the System category containing the System Administration module can only be viewed by users with Module Administration rights.
- Dragging the cursor over each tab would display a drop down list of the modules grouped in each category.
- Note that the user will only be able to view modules where he or she has access rights.

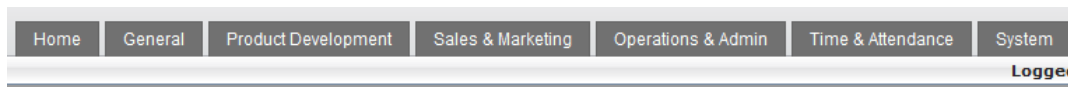


Figure 7: Menu Bar

B. Transformation, Help, My Account and Sign Out buttons

- The leftmost icon, the Transformation button, enables a user to shift from User to Module Administrator mode, in order to access modules he has been assigned to administer. Note that the button will only appear if a user has Module Administration Rights to at least one module. *See detailed features of the Transformation button in Section 7.0 of this guide.*
- Represented by a Question Mark, the Help button allows users to access the Help page, which provides links to resources helping users navigate through the Teczo.com online platform. Clicking this button opens a new window containing the Help page. *See detailed features of the Help button in Section 7.0 of this guide.*
- Represented by the Settings icon, the My Account button allows users to access the My Account page, where they can control their Password, Language, Customized User Groups and Dashboard settings. *See detailed features of the My Account button in Section 7.0 of this guide.*
- The rightmost icon, the Sign Out button, enables the user to exit Teczo.com completely and securely. *See detailed features of the Sign Out button in Section 7.0 of this guide.*



Figure 8: Transformation, Help, My Account and Sign Out Buttons

C. User Status Bar

- Located below the Menu Bar, the Status Bar presents the user's status and current logon date.

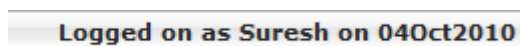


Figure 9: User Status Bar

D. Left Side Menu

- The Left Side Menu provides quick access to all the modules, excluding the System Administration module. As in the Menu Bar, the modules are grouped in their respective categories, namely, General, Product Development, Sales & Marketing, Operations & Admin and Time & Attendance. The Left Side Menu also includes a section called **Others**, through which users can access the latest news on Teczo and Teczo.com features.
- Note that the user will only be able to view and access modules where he or she has access rights.

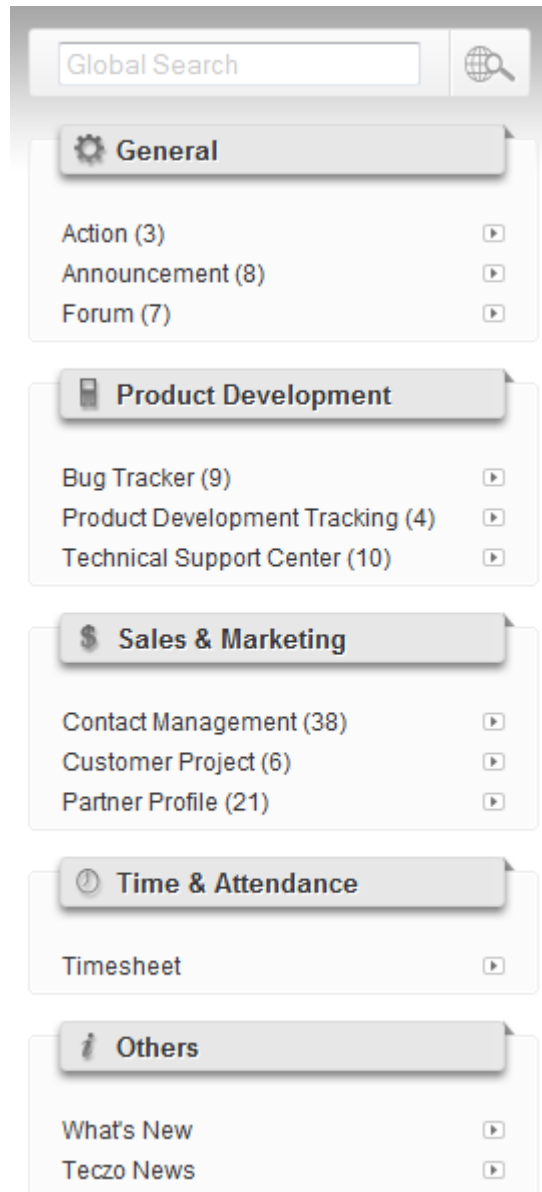


Figure 10: *Left Side Menu*

E. Dashboard Gadgets

- Constituting the three columns beside the Left Side Menu, Dashboard Gadgets give users a glimpse of and a quick access to module items that are unread, requiring immediate response, newly assigned, etc. They also include sections on the latest Teczo news and recent updates or changes to the system.

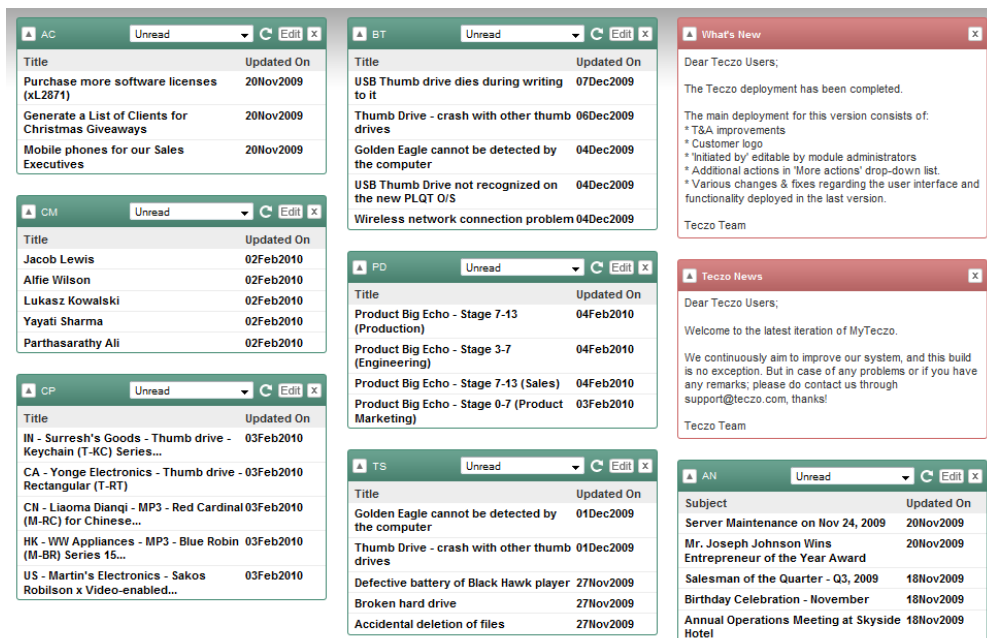


Figure 11: Dashboard Gadgets

2.2. Accessing Modules through the Home Page

Modules can be accessed through the home page in two ways; the user can either draw the cursor over the category tabs in the menu bar to select a module or choose from the module links on the left side menu of the dashboard. Clicking the module link through either of these methods would direct the user to the summary page of the selected module.

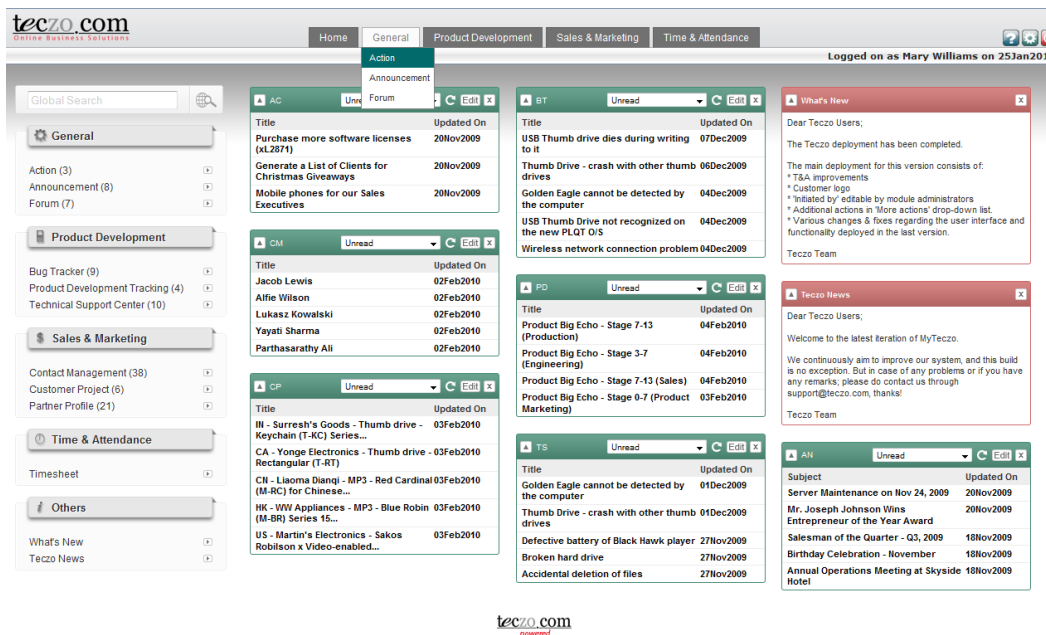


Figure 12: Accessing Modules

3.0. Dashboard

Upon logging into myteczo.com, users will be directed to the home page, which contains the dashboard. The dashboard serves as users' quick access to modules, enabling them to add items, open item details and preview newly created items without having to open each module.

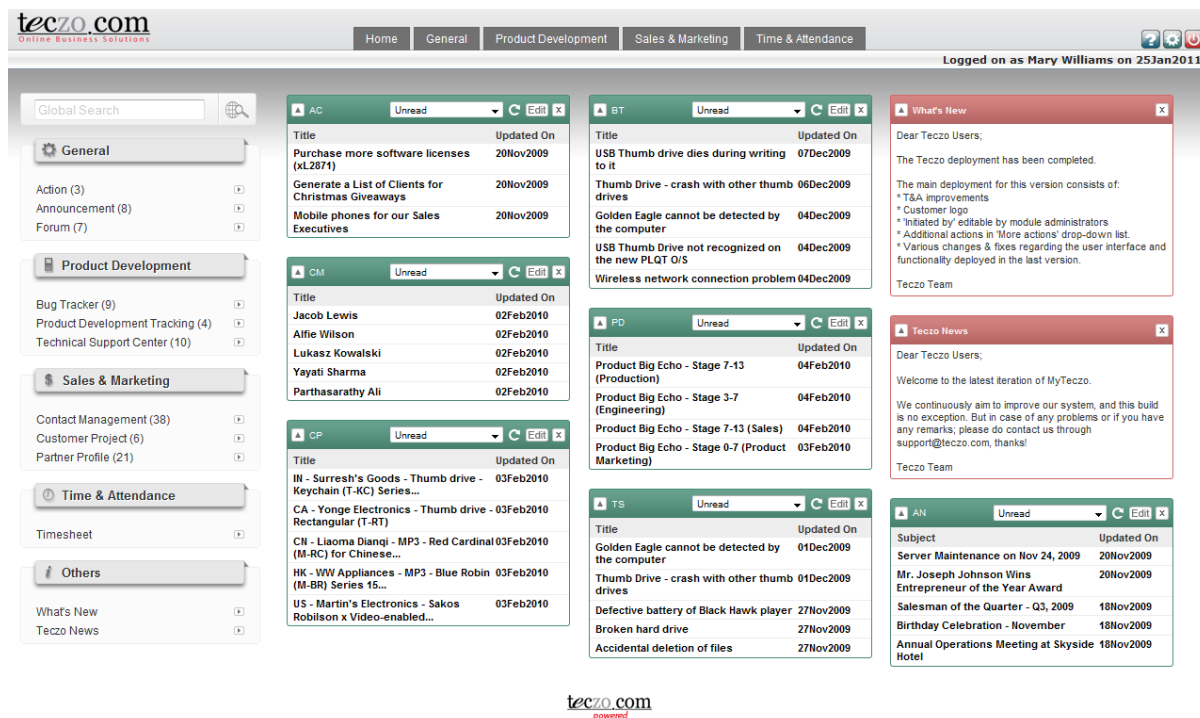


Figure 13: Dashboard

3.1. Global Search

This section allows the user to search for specific module items by typing relevant keywords in the search field.

- A. Type in the desired keywords in the search field.

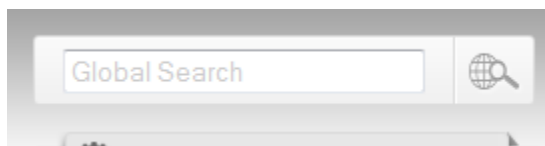


Figure 14: Global Search

- B. Click the global search icon or press the enter key. A new page containing the search result will then be opened.

Module Name	Updated By	Updated On	Code	Title	Initiator	Moderator
<ul style="list-style-type: none"> Announcements Bug Tracker Customer Project 						
Customer Project	Mary Williams	03Feb2010	CP000010	IN - Suresh's Goods - Thumb drive - Keychain (T-KC) Series 14	Shunde Li	Shunde Li
Customer Project	David Jones	03Feb2010	CP000008	CA - Yonge Electronics - Thumb drive - Rectangular (T-RT)	Juan Carlos Hernandez	Juan Carlos Hernandez
Customer Project	Mary Williams	03Feb2010	CP000010	IN - Suresh's Goods - Thumb drive - Keychain (T-KC) Series 14	Shunde Li	Shunde Li
Customer Project	David Jones	03Feb2010	CP000008	CA - Yonge Electronics - Thumb drive - Rectangular (T-RT)	Juan Carlos Hernandez	Juan Carlos Hernandez
<ul style="list-style-type: none"> Product Development Tracking 						
Product Development Tracking	Jowar Verma	04Feb2010	PD000003	Product Big Echo - Stage 7-13 (Production)	He Zhang	Jowar Verma
Product Development Tracking	Jowar Verma	04Feb2010	PD000002	Product Big Echo - Stage 3-7 (Engineering)	Jowar Verma	Jowar Verma
Product Development Tracking	He Zhang	04Feb2010	PD000004	Product Big Echo - Stage 7-13 (Sales)	He Zhang	He Zhang
Product Development Tracking	He Zhang	03Feb2010	PD000001	Product Big Echo - Stage 0-7 (Product Marketing)	He Zhang	He Zhang
Product Development Tracking	Jowar Verma	04Feb2010	PD000003	Product Big Echo - Stage 7-13 (Production)	He Zhang	Jowar Verma
Product Development Tracking	Jowar Verma	04Feb2010	PD000002	Product Big Echo - Stage 3-7 (Engineering)	Jowar Verma	Jowar Verma

Figure 15: Global Search Result

- C. The user can double click the desired item to view its complete details.

3.2. Create New Item

Instead of going to each module, a user can create a new module item through the left side menu.

Note: Only users with write access can create new items.

- A. Draw the cursor over the arrow button beside the module name.

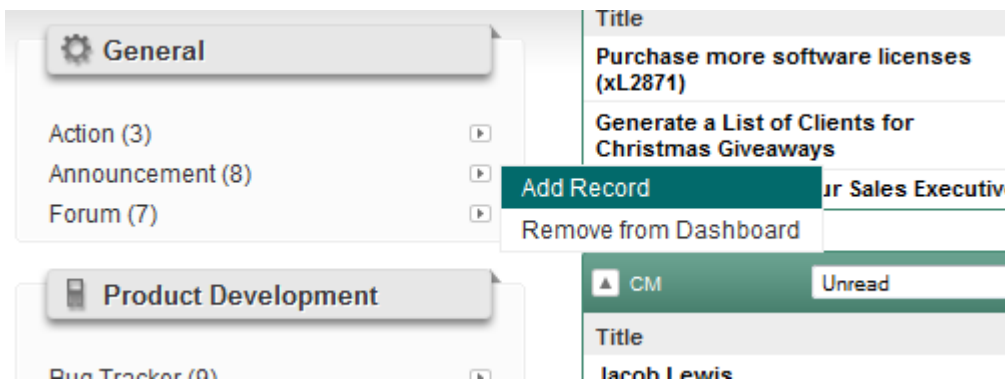


Figure 16: Add New Item

- B. Click **Add** to open an in-browser page where users can create a new item.

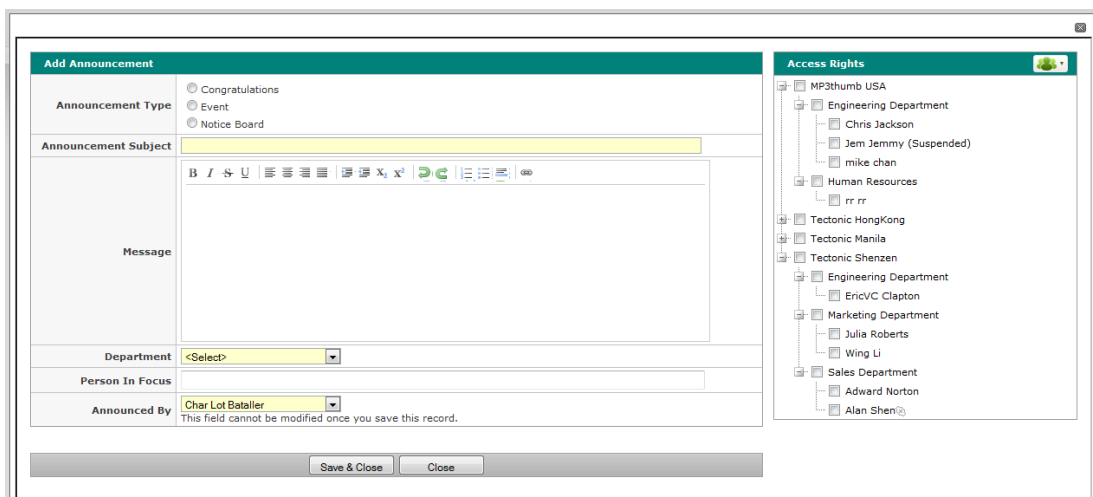


Figure 17: Add New Item

- C. Fill in the details for the new item and click on **Save & Close** button to save and close the page or the Close button to cancel the creation of and close the page.

3.3. Customize Gadget

Users have a number of options to customize dashboard gadgets in order to add or remove gadgets, or change the way they are displayed.

- A. Users can add or remove gadgets through any of the following ways:

1. Add or Remove gadget/s through the left side menu
 - a. Draw the cursor over the arrow button beside the module name.

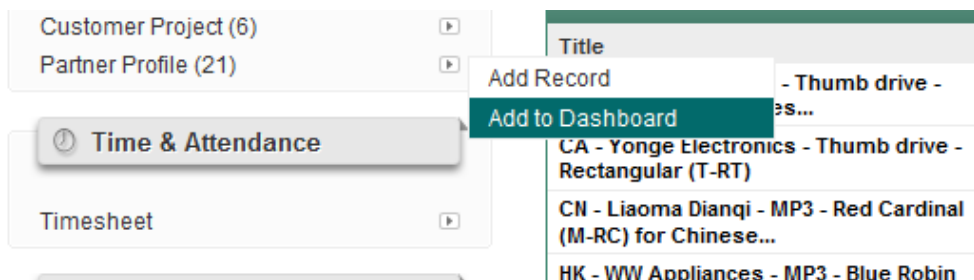


Figure 18: Add or Remove through the Left Side Menu

- b. Select **Add to Dashboard** if the module gadget is not displayed or Remove from Dashboard if it is displayed.
2. Remove through the gadget
 - a. Click the “X” button on the upper right corner of the gadget being removed. Upon clicking the button, the user will be prompted with a pop-up box, where he can either click **OK** to proceed with removing the gadget or click **Cancel** to retain the gadget and go back to the dashboard.

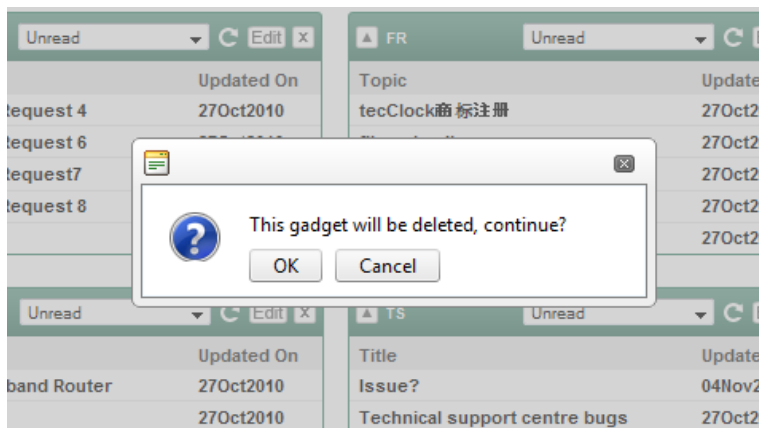


Figure 19: Remove through the Gadget

3. Add or Remove through the My Account settings
 - a. Click on **My Account** button to open the My Account page.
 - b. Click on the **Dashboard** tab.
 - c. Tick the box beside the desired modules to display the gadgets or remove the tick mark to hide the gadgets.
 - d. Click **Save Changes** to allow the changes to take effect.

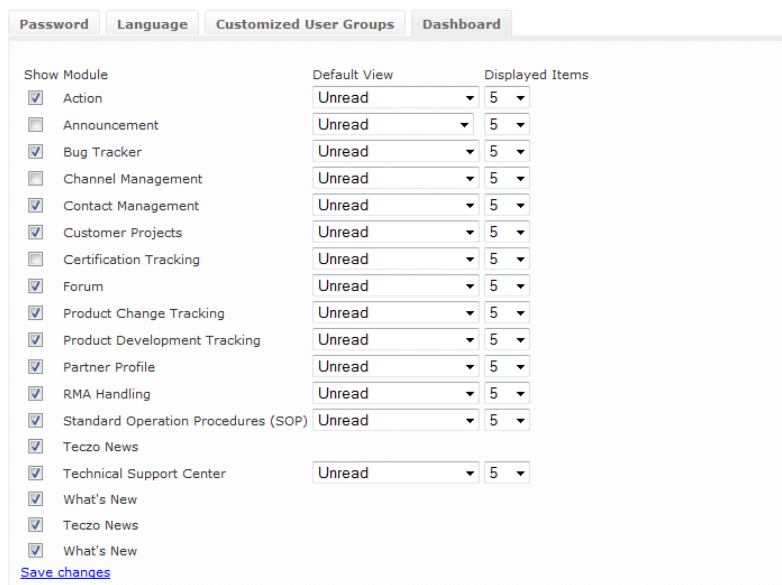


Figure 20: Customize Gadgets through the My Account Settings

- B. Users can customize the content displayed by each gadget through either of the following ways.
 1. Click on **Edit** button in the upper right corner of the gadget to open the edit fields.
 - a. Select the number of topics to be displayed from the dropdown list.

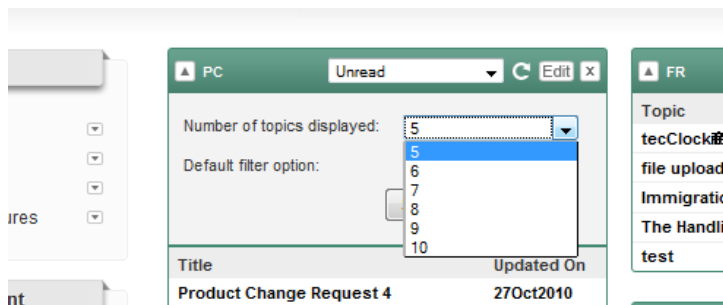


Figure 21: Number of Topics Displayed

- b. Select the type of items to be displayed from the default filter option dropdown list.

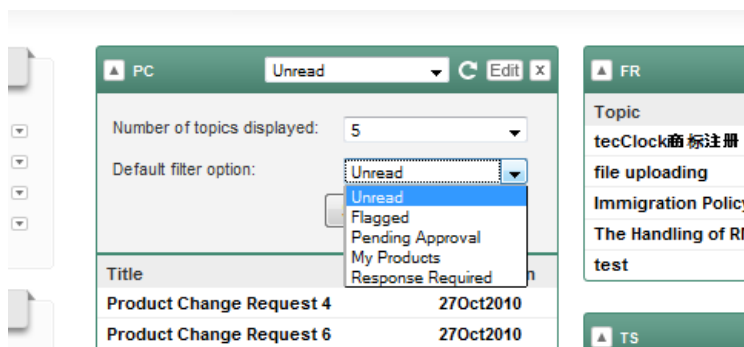


Figure 22: Default Filter Option

2. Click on **My Account** button beside the Sign Out button to open the My Account page.
 - a. Click on the **Dashboard** tab.
 - b. Under the Default View column, click the arrow button to open the dropdown list and choose the type of items to be displayed by each gadget.
 - c. Under the Displayed Items column, click the arrow button to open the dropdown list and choose the number of items to be displayed by each gadget.
 - d. Click **Save Changes** to allow the changes to take effect.

	Default View	Displayed Items
<input type="checkbox"/> Select All		
<input checked="" type="checkbox"/> Action	My Actions	6
<input checked="" type="checkbox"/> Announcement	Unread	5
<input checked="" type="checkbox"/> Bug Tracker	Flagged	5
<input checked="" type="checkbox"/> Channel Management	My Actions	5
<input checked="" type="checkbox"/> Contact Management	Response Required	5
<input checked="" type="checkbox"/> Customer Projects	Unread	5
<input checked="" type="checkbox"/> Certificate Tracking	Unread	5
<input checked="" type="checkbox"/> Forum	Unread	10
<input checked="" type="checkbox"/> Product Change Tracking	Unread	5
<input checked="" type="checkbox"/> Product Development Tracking	Unread	5
<input checked="" type="checkbox"/> Partner Profile	Unread	7
<input checked="" type="checkbox"/> RMA Handling	Unread	5
<input checked="" type="checkbox"/> Standard Operation Procedures (SOP)	Unread	5
<input checked="" type="checkbox"/> Time & Attendance	Unread	5
<input type="checkbox"/> Technical Support Center	Timesheet (Today)	5
<input type="checkbox"/> Teczo News	Unread	5
<input type="checkbox"/> What's New		

Figure 23: My Account - Dashboard Tab

4.0. Summary Page

Upon clicking any module link, the user will be directed to the selected module's Default Summary Page, which contains the Filter and Summary Table.

Updated On	Updated By	AC ID	Action Title	Dept	%Cmp	P	Initiated By	Assigned To	Latest Deadline
Open									
20Nov2009	Lucas Müller	AC000008	2009 December - equipment purchases	Information Technology		M	Mary Williams	Harry Williams	20Nov2009
20Nov2009	Barbara Miller	AC000003	1 Purchase more software licenses (xL2871)	Information Technology	0	L	Barbara Miller	Suresh Singh	04Dec2009
20Nov2009	David Jones	AC000010	2 Mobile phones for our Sales Executives	Sales	70	M	David Jones	Harry Williams	04Dec2009
20Nov2009	Shunde Li	AC000009	Gadget 2009	Marketing		H	David Jones	He Zhang	07Dec2009
20Nov2009	He Zhang	AC000007	UAT for sports edition Golden Eagle MP3	Marketing	40	H	Hriday Guha	Jowar Verma	24Nov2009
20Nov2009	He Zhang	AC000001	Prepare press release for launching model MP3 - Blue Robin	Marketing		M	David Jones	He Zhang	15Dec2009
20Nov2009	Michael Smith	AC000006	Organize a day-trip to Fisherman's Wharf	Human Resources and Admin	90	L	Michael Smith	Barbara Miller	31Dec2009
19Nov2009	Mary Williams	AC000005	Revise our NDA template	Legal	80	M	Mary Williams	Chris Jackson	01Nov2009
Closed									
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									
20Nov2009	Matthew Davis	AC000002	Generate a List of Clients for Christmas Giveaways	Sales	100	M	Matthew Davis	Olivia Jones	25Nov2009

Figure 24: Module Default Summary Page

4.1. Search and Filter

This feature allows users to search for and view specific module items. The search feature has two filter modes: Basic and Advanced. The user can toggle between these two modes by alternately clicking the Basic and Advanced Search links located below the User Status Bar. By default, it is the Basic Search mode that the user sees upon arriving at the summary page.

- A. Basic Search Mode** – provides users with the option to search for either specific module items using the Item ID field or module items containing desired keywords using the Quick Search field. Search for specific module items by providing the module item ID and clicking the Go button, which prompts the system to display the corresponding module item. Meanwhile, search for module items containing desired keywords by typing in the keyword in the Quick Search field and clicking the Search button, which prompts the system to display all items containing the keyword provided. Click the Reset button anytime to clear the search fields and go back to the default summary page.

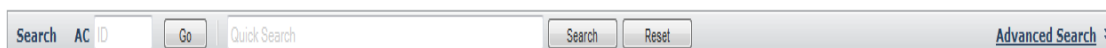


Figure 25: Basic Search Mode

- B. Advanced Search Mode** – provides the users with more search fields, ensuring a more precise filter and search. Choose a search category from the dropdown list of some or all of the available fields and click the Search button above the fields to generate search results in the summary page. Click the Reset button anytime to revert to the default fields and the default summary page.

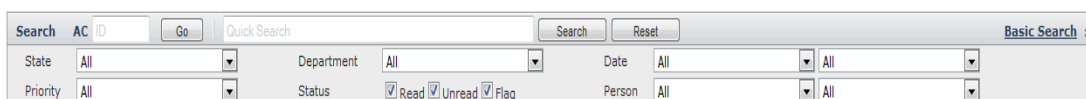


Figure 26: Advanced Search Mode

4.2. Status Bar

- A. State Headers** – shows the number of items in each state, namely, Open, On-Hold, Closed and Archived. Users can click the state headers to filter items shown on the summary page based on their state.

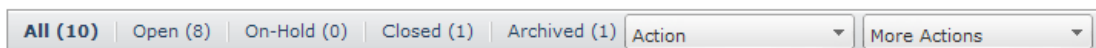


Figure 27: State Headers

Note: The state headers apply to all user modules, except the Announcement module. See Section 2.1.2 of the Announcement User Guide for details on the Announcement Type and Status.

- B. Action** – provides a dropdown list of different actions that can be applied to module items.

All (10) Open (8) On-Hold (0) Closed (1) Archived (1)				Action	More Actions						Add Action
Updated On	Updated By	AC ID				Dept	%Cmp	P	Initiated By	Assigned To	Latest Deadline
Open				<ul style="list-style-type: none"> Mark As Read Mark as Unread Flag Clear Flag Move To... 							
20Nov2009	Lucas Müller	AC000008	2009 December			Information Technology		M	Mary Williams	Harry Williams	20Nov2009
20Nov2009	Barbara Miller	AC000003	Purchase more software licenses (xL2)			Information Technology	0	L	Barbara Miller	Suresh Singh	04Dec2009
20Nov2009	David Jones	AC000010	Mobile phones for our Sales Executives			Marketing	70	M	David Jones	Harry Williams	04Dec2009
20Nov2009	Shunde Li	AC000009	Gadget 2009			Marketing		H	David Jones	He Zhang	07Dec2009
20Nov2009	He Zhang	AC000007	UAT for sports edition Golden Eagle MP3			Marketing	40	H	Hriday Guha	Jowar Verma	24Nov2009
20Nov2009	He Zhang	AC000001	Prepare press release for launching model MP3 - Blue Robin			Marketing		M	David Jones	He Zhang	15Dec2009
20Nov2009	Michael Smith	AC000006	Organize a day-trip to Fisherman's Wharf			Human Resources and Admin	90	L	Michael Smith	Barbara Miller	31Dec2009
19Nov2009	Mary Williams	AC000005	Revise our NDA template			Legal	80	M	Mary Williams	Chris Jackson	01Nov2009
Closed											
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											
20Nov2009	Matthew Davis	AC000002	Generate a List of Clients for Christmas Giveaways			Sales	100	M	Matthew Davis	Olivia Jones	25Nov2009

Figure 28: Action

1. Mark As Read – Items marked as Read have titles not displayed in bold.
2. Mark as Unread – Items marked as Unread have titles displayed in bold.
3. Flag – Flagged items have titles displayed in red. This action helps remind users of important items they need to follow up on.
4. Clear Flag – Non-flagged items have titles displayed in black. Choosing this action reverts the status of items from flagged to non-flagged.
5. Move To... – This allows users with edit rights to one or more items to easily transfer selected item/s to any of the state groups, namely, Open, On-hold, Closed and Archived.

- C. More Actions** – a list of additional actions that can be applied to module items.

Hold (0) Closed (2) Archived (0)			Action	More Actions					
Updated By	FR ID	Forum			Cat	P	Submitted On	Initiated By	M
Singh	FR000001	How to turn challenges into opportu		<ul style="list-style-type: none"> Add Access Remove Access Change Moderated By Export to Excel 	OPM	H	20Nov2009	Michael Smith	Mic
Singh	FR000008	Language options for our corporate			SNM	M	23Nov2009	Lucas Müller	Luc

Figure 29: More Actions

1. **Add or Remove Access** – allows users to add or remove access rights to one or more items.
 - a. Upon selecting the item/s, a user with edit rights can choose to either Add or Remove Access to such items.

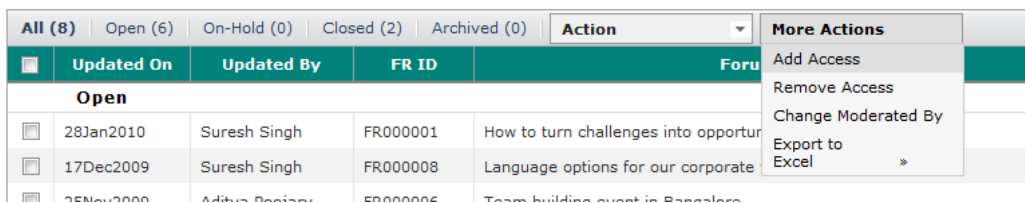


Figure 30: Add Access

- b. Upon clicking either the Add or Remove Access button from the More Actions dropdown list, the user will receive a prompt showing him the list of items to which he has edit rights. The user can only add or remove access to items where he has edit rights.

Figure 31:

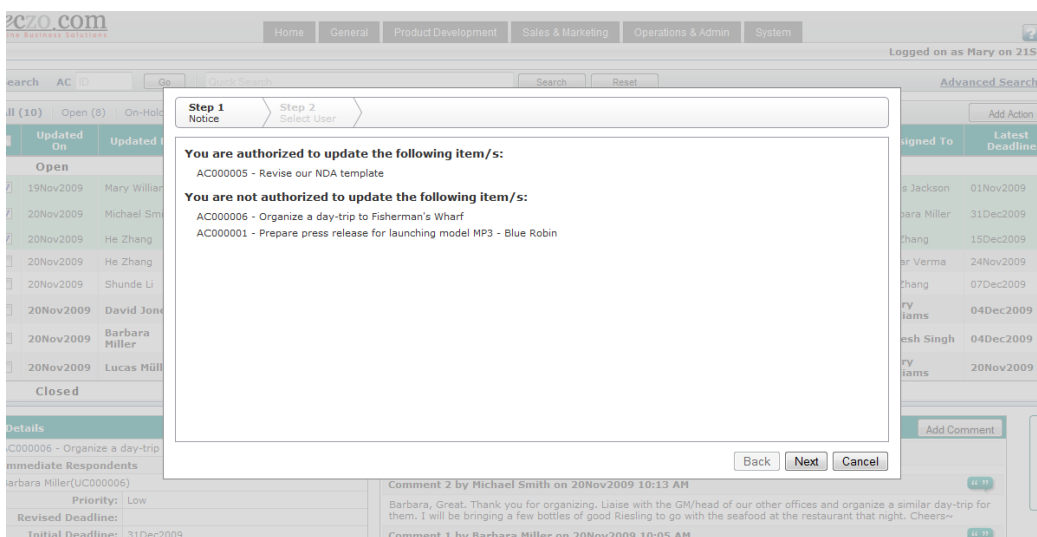


Figure 32: Notice of Edit Rights

- c. After clicking the Next button, the user is provided with the list of all users from which he can select whom to give or deny access. The list of all users appears on the left side, while the list of selected users appears on the right side, as shown in Figure 30. The user can choose to add or remove access for one or more users. The user can also click the name of selected users in the right side to remove them from the list of users to be given or denied access.

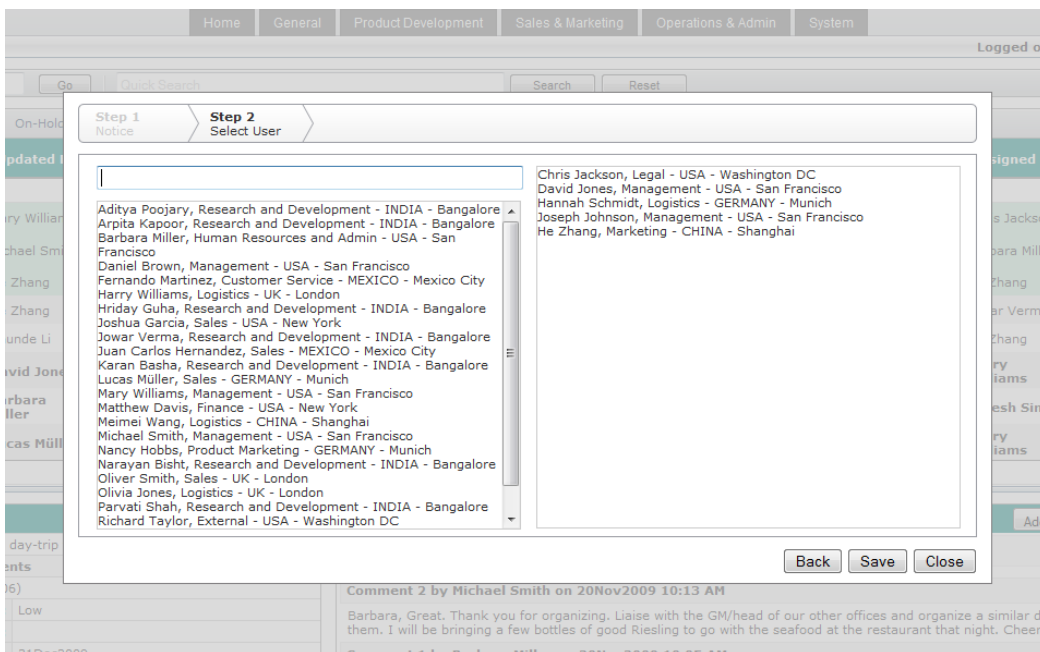


Figure 33: Select Users

- 2. **Change Assigned Fields** – instead of opening the edit page of each item, user can use this action which provides the user to change the moderator, assigned person, project owner, project phase etc. for different modules. Table below shows the different in changing the assigned persons for every module.

MODULE	ACTION	Definition
Action	Change Assigned To	Change the name of the user to whom the execution of the action is assigned
Forum	Change Moderated By	Change the name of the moderator of the topic
Standard Operating Procedures	Change Owned By	Change the name of the user who owns the responsibility of the SOP
	Change Phase	Change the phase status of the SOP item
Bug Tracker	Change Assigned To	Change the name of the representative to whom the repair and fixing of bug is assigned
Certificate Tracking	Change Project Owner	Change the name of the user who owns the responsibility of the Certificate item
	Change Stage	Change the stage status of the certificate item

Product Change Tracking	Change Assigned To	Change the name of the user who is responsible to execute the change request
	Change Stage	Change the stage status of the change request
Product Development Tracking	Change Product Owner	Change the name of the user who is responsible for the development of the product
	Change Stage	Change the stage status of the product development
Technical Support Center	Change Assigned To	Change the name of the user who is assigned to handle the technical support request
Channel Management	Change Our Rep	Change the name of the user representing the company to the channel partner
	Change Registration Status	Change the status of the registration of the channel partner
Contact Management	Change Our Rep	Change the name of the user representing the company to the contact
Customer Project	Change Our Rep	Change the name of the user representing the company to the customer project
Partner Profile	Change Our Rep	Change the name of the user representing the company to the partner
RMA Handling	Change Our Rep	Change the name of the user representing the company to the customer
	Change Assigned To	Change the name of the user who is assigned to handle the return of merchandise

Table 1: Change Assigned Fields

- 3. **Export to Excel** – allows users to export one or more items to excel.
 - a. User can export either all the items he or she has access to or one or more selected items

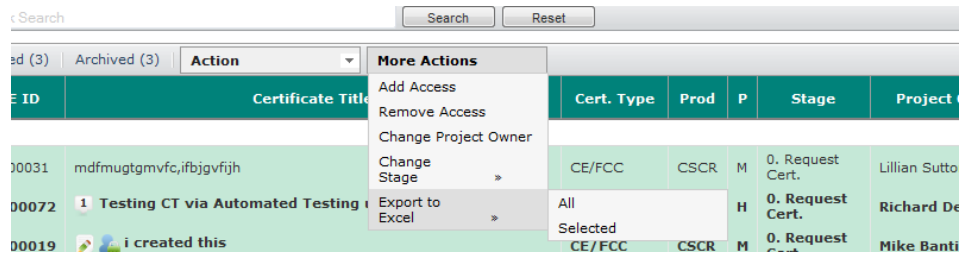


Figure 34: Export to Excel

- b. User will be prompted with a choice to either open the items or save to file.

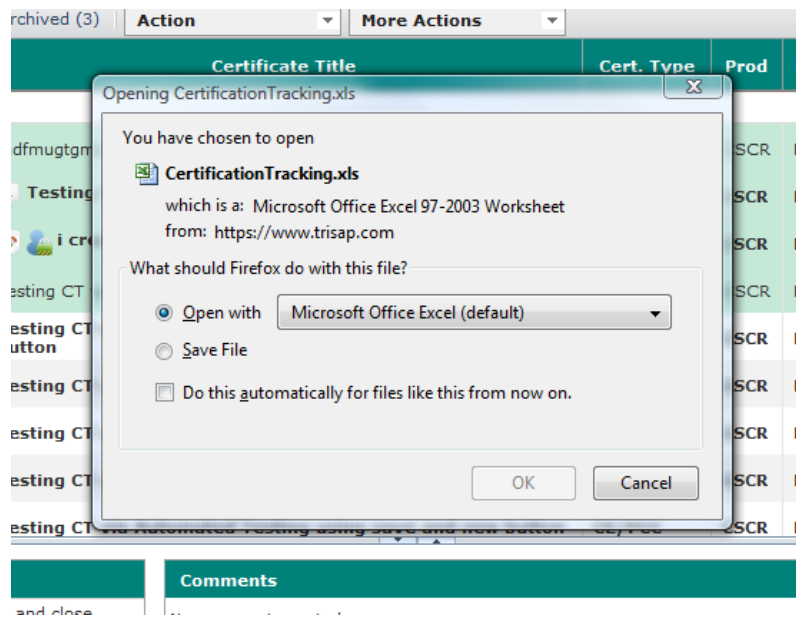


Figure 35: Open or Save Option

- c. Depending on the version of the MS excel the user have, he or she might get message to verify that the file is not corrupted and is from a trusted source. Upon seeing the below message, click Yes to open the exported file.

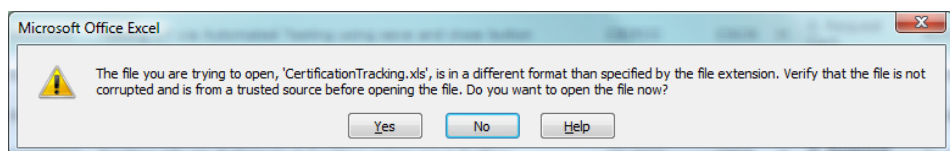


Figure 36: Verification of Exported File

4.3. Summary Table

The Summary Table displays all items where a user has access rights.

- A. **Select All** - a check box in the header column that can be ticked to enable the user to select all items. The user can also select one or more items by ticking their individual check boxes.

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

Figure 37: Check Box

B. **Sort Fields** – a feature enabling users to change the order by which items in the summary table are displayed. Users can click each header in the column to sort the fields.

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 38: Sort Fields

C. **Drag Column** – a feature allowing users to change the position of each column field by dragging the column header to the desired location. Note that the fields will revert to default view once the page is refreshed or reloaded.

Updated On	Updated By	AC ID	%Cmp	Action Title	Dept	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	0	Purchase more software licenses (xL2871)	IT	L	Barbara Miller	Suresh Singh	04Dec09
20Nov09	David Jones	AC000010	70	Mobile phones for our Sales Executives	SLS	M	David Jones	Harry Williams	04Dec09
20Nov09	Shunde Li	AC000009		Gadget 2009	MKT	H	David Jones	He Zhang	07Dec09
20Nov09	He Zhang	AC000007	40	UAT for sports edition Golden Eagle MP3	MKT	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	90	Organize a day-trip to Fisherman's Wharf	HRA	L	Michael Smith	Barbara Miller	31Dec09
19Nov09	Mary Williams	AC000005	80	Revise our NDA template	LAW	M	Mary Williams	Chris Jackson	01Dec09
Closed									
20Nov09	Mary Williams	AC000004	100	Changes to be made on the MP3 - Black Hawk brochure (Chinese Version).	MKT	H	Mary Williams		26Nov09
Archived									
20Nov09	Matthew Davis	AC000002	100	Generate a List of Clients for Christmas Giveaways	SLS	M	Matthew Davis	Olivia Jones	25Nov09

Figure 39: Drag Column

D. Update Indicators – icons that appear whenever items have been updated. They are designed to enable users to quickly identify the type of update in an item.










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									
20Nov2009	Lucas Müller	AC000008	 2009 December - equipment purchases	Information Technology		M	Mary Williams	Harry Williams	20Nov2009
20Nov2009	Barbara Miller	AC000003	  1 Purchase more software licenses (xL2871)	Information Technology	0	L	Barbara Miller	Suresh Singh	04Dec2009
20Nov2009	David Jones	AC000010	  2 Mobile phones for our Sales Executives	Sales	70	M	David Jones	Harry Williams	04Dec2009

Figure 40: Topic Indication

-  - indicates that a new item has been created. This icon will disappear 3 days after the creation of the item.
-  - indicates that changes have been made to the details of the item. This icon will disappear as soon as the item is opened.
-  - indicates that comments have been added to the item. The number shows how many new comments have been posted since the user last accessed the item. This icon will disappear as soon as the item is opened.
-  - indicates that access rights have been changed for the item. This icon will disappear as soon as the item is opened.

5.0. Details Page

The Details Page contains the details of each module item. It can be viewed in two ways:

1. By clicking a module item, the user will be able to see the details of such item on the details pane, which appears below the summary table.
2. By double clicking a module item, the user will be able to see the details of such item on a separate window dedicated to the details page.

The screenshot shows the Teczo.com web application interface. At the top, there is a navigation menu with options like Home, General, Product Development, Sales & Marketing, Operations & Admin, and System. The user is logged in as Mary on 21Sep2010. Below the navigation is a search bar and a list of tasks. The task list has columns for Updated On, Updated By, AC ID, Action Title, Dept, %Cmp, P, Initiated By, Assigned To, and Latest Deadline. One task is selected, and its details are shown in a pane below. The details pane includes sections for Immediate Respondents, Description, Department, Submitted By, Submitted On, Initiated By, Updated By, Updated On, Closed By, Closed On, State, Keywords, Assigned To, Update History List, Attachments, and a table of attachments. The comments section shows two comments with their respective dates and times, and attached files.

Figure 41: Details Pane View

The screenshot shows a dedicated details page for a task. The task ID is FR000004 and the title is "Should we expand and recruit faster?". The details pane includes sections for Immediate Respondents, Description, Category, Submitted By, Submitted On, Initiated By, Updated By, Updated On, Closed By, Closed On, State, Keywords, Moderated By, Update History List, Attachments, and a table of attachments. The comments section shows three comments with their respective dates and times, and attached files.

Figure 42: Details Dedicated Page

A. **Details page** - consists of three sections, namely, Details Column, Comments Column and Access Rights Tab.

1. Details Column – shows the module item details.




Details		Edit
AC000008 - 2009 December - equipment purchases		
Immediate Respondents		
Priority:	Medium	
Revised Deadline:		
Initial Deadline:	20Nov2009	
Description		
Please provide Harry with a list of all necessary equipment purchase for December. Harry, please consolidate the list and submit to me for final approval before making the purchases. Thanks		
Department:	Information Technology	
% Completed:		
Submitted By:	Mary Williams	
Submitted On:	19Nov2009 06:13 PM	
Initiated By:	Mary Williams	
Updated By:	Lucas Müller	
Updated On:	20Nov2009 04:11 PM	
Closed By:		
Closed On:		
State:	Open	
Keywords		
Assigned To:	Harry Williams	
Update History List		
Attachments		
 Maximum 8MB per file Add attachments		
#	by	Attachment
2		Dec2009_purchase_list(Munich).xls 34.50 KB 
1		Dec2009_purchase_list(Bangalore).xls 34.50 KB 

Figure 43: Details Column

2. Comments Column – contains the comments, quotes and attachments posted in the item. The user can set the number of comments displayed per page by keying the desired number into the Page size box and then clicking Change.



Figure 44: Comments Column

- a. Comments – relevant messages posted by users to discuss an item. Comment threads between members are viewed in chronological order, with the latest comment on top. To add a comment, simply click the Add Comment button and type the comment in the popup box. Click Save to submit the comment, Reset to clear the comment and type a new one, or Close to cancel the submission of the comment. Note that a user cannot submit and save a blank field when adding a comment.

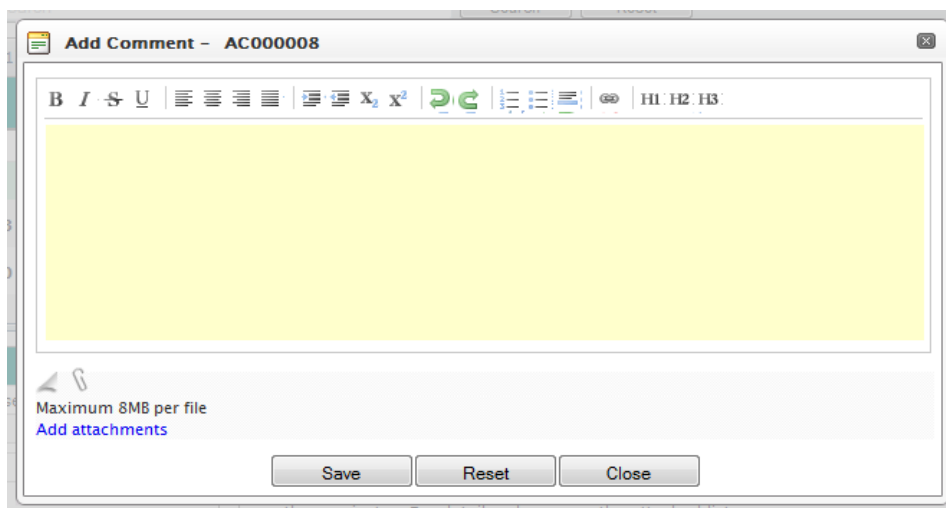


Figure 45: Add Comment Window

- b. Quotes – quoted statements taken from a user’s particular comment. To quote a comment, simply click the Quote button represented by two quotation marks within each comment box. A new Add Comment box quoting the original message and its date and time of posting will then be opened, enabling users to type their own comment below the quoted statement. Click Save to submit, Reset to clear the comment and type a new one, or Close to cancel the quote and comment submission. Note that clicking the Reset button will only clear the user’s own comment and not the quote. Instead, the user may edit the quote if he or she wishes.

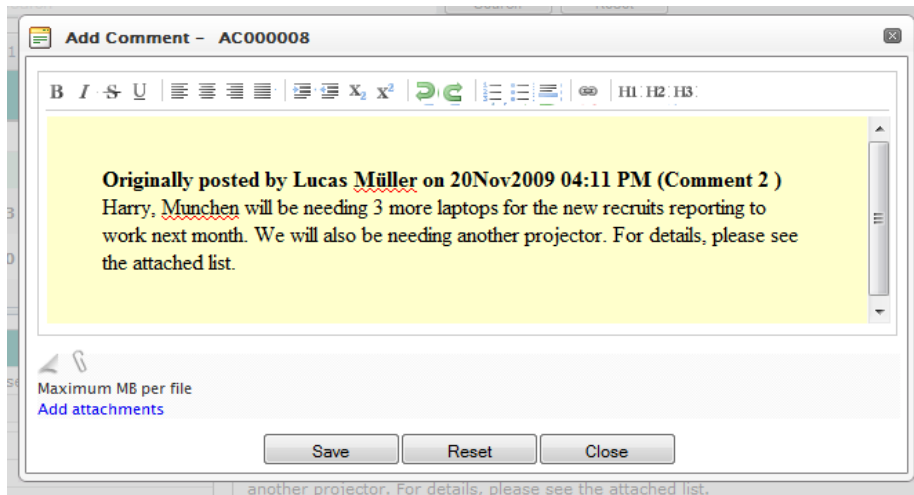


Figure 46: Quote Comment

- c. Attachments – files users can attach to each comment. Attachments may not exceed the maximum file size set by the system administrator through the System Administration module (e.g. 8 MB, 10 MB, 20 MB). To attach a file, simply click the Add Attachments link located at the bottom of the Add Comment box. Click Save to attach the file to the comment or click Close to cancel the attachment and comment. After saving, the comment and attachment will appear in the comments thread, with the file name and file size of the attachment being displayed. Note that the file will not be attached if no comment is typed in the Add Comment box, and that clicking the Reset button will only clear the comment and not the attachment.

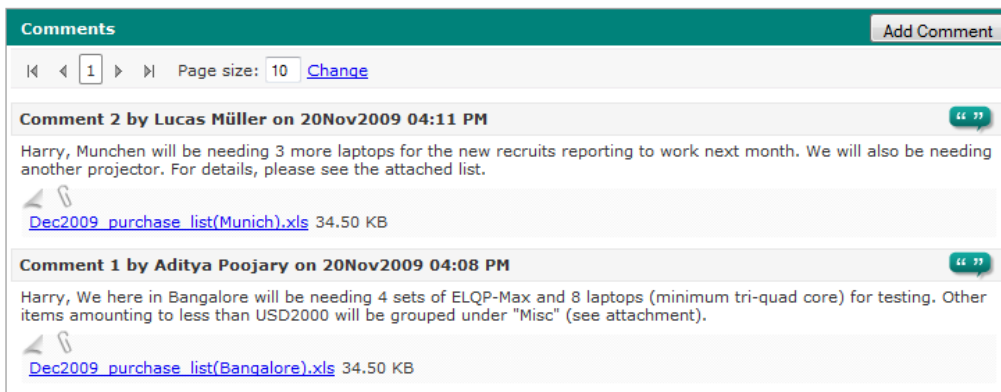


Figure 47: Attachments

- 3. Access Rights Tab – contains the list of users who are allowed to access the item. Click the Access Rights tab to see the list of all users grouped in their respective office and departments. Note that the office and departments are hidden when no user grouped under them has been given access rights to the item.

By default, the list is provided in expanded view, displaying all departments in each office and all users in each department. The user has the option to view a collapsed version of the list to hide all the users by clicking the negative “-” icon beside their respective department, or all the departments by clicking the negative “-” icon beside their respective office. Note that the user can easily toggle between the expanded and collapse view modes by alternately clicking the positive “+” and negative “-” icons.

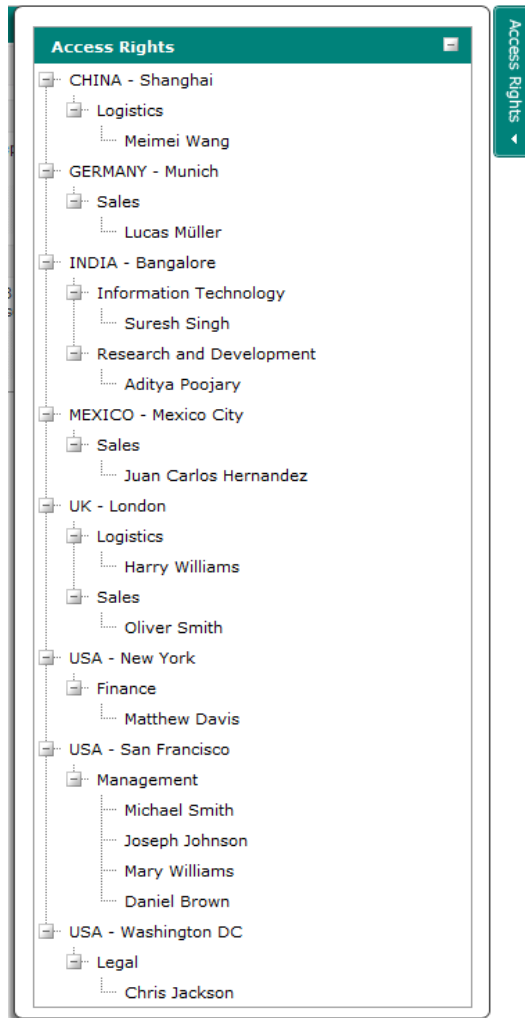


Figure 48: Access Rights Tab

B. Update History List

1. Each item includes an Update History List where all changes made in the details column and access rights of the item are recorded.
2. To view the Update History List, click the link found at the bottom part of the details column.

Update History - AC000008		
Update # 2	Updated On 20Nov09 04:12:01 PM	Updated By Lucas Müller
Details		
Field	Updated By	
Changed From	Aditya Poojary	
Changed To	Lucas Müller	
Update # 1	Updated On 20Nov09 04:08:51 PM	Updated By Aditya Poojary
Details		
Field	Updated By	
Changed From	Mary Williams	
Changed To	Aditya Poojary	

Figure 49: Update History Window

C. View and Delete Attachments

1. Each item can accommodate a maximum file size based on the company’s subscription package.
2. All files attached in the details column and comments column (if there are any) are listed in the bottom part of the details column. The list of attachments is ordered chronologically, with the last attached file on top. By default, only five attachments are displayed when the item is opened, and the user can expand the view to see all attachments by clicking the positive “+” icon.
3. To delete an attachment, click the Recycle Bin icon beside the file name. Note that the Recycle Bin icon is only visible to users who have rights to delete attachments.
 - All attachments in the details column can be deleted by the Module Administrator, as well as by the Initiator and Moderator of the item.
 - All attachments in the comments column can be deleted by the Module Administrator, as well as by the Initiator and Moderator of the item.
 - Users can only delete attachments that have been posted by them in their comments.

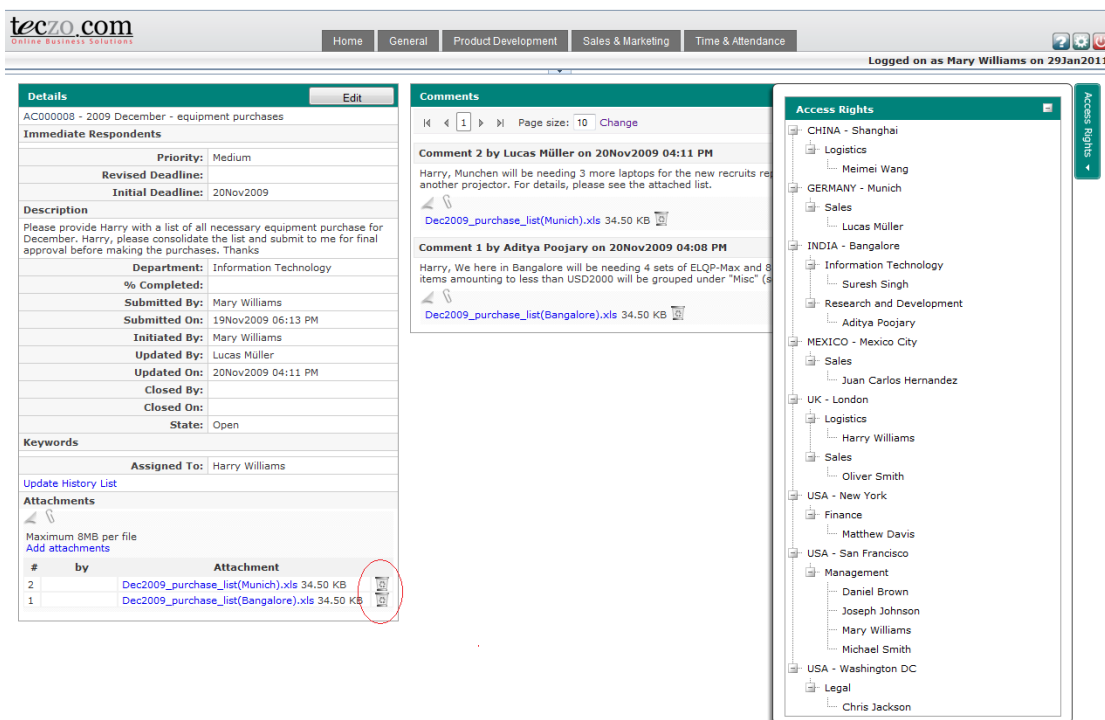


Figure 50: Recycle Bin Icon

6.0. Add or Edit Page

Every Teczo module includes Add and Edit pages, which are accessible to users who have Administration and Write access.

A. Add Items

To add an item, simply click the Add button located in the rightmost side of the Status Bar.

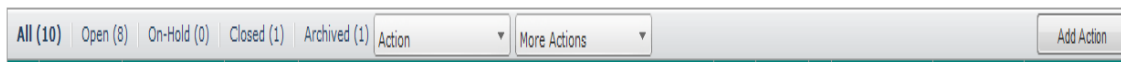


Figure 51: Add Button

Note: See individual module manuals for details on the add item fields.

B. Edit Items

The user can edit the details of each item by clicking the Edit button in the details column of the item. The Edit button is only visible to the item Initiator, Submitter and Moderator, and to the Module Administrator. All the fields in the Edit details page can be edited, except for the Initial Deadline field.

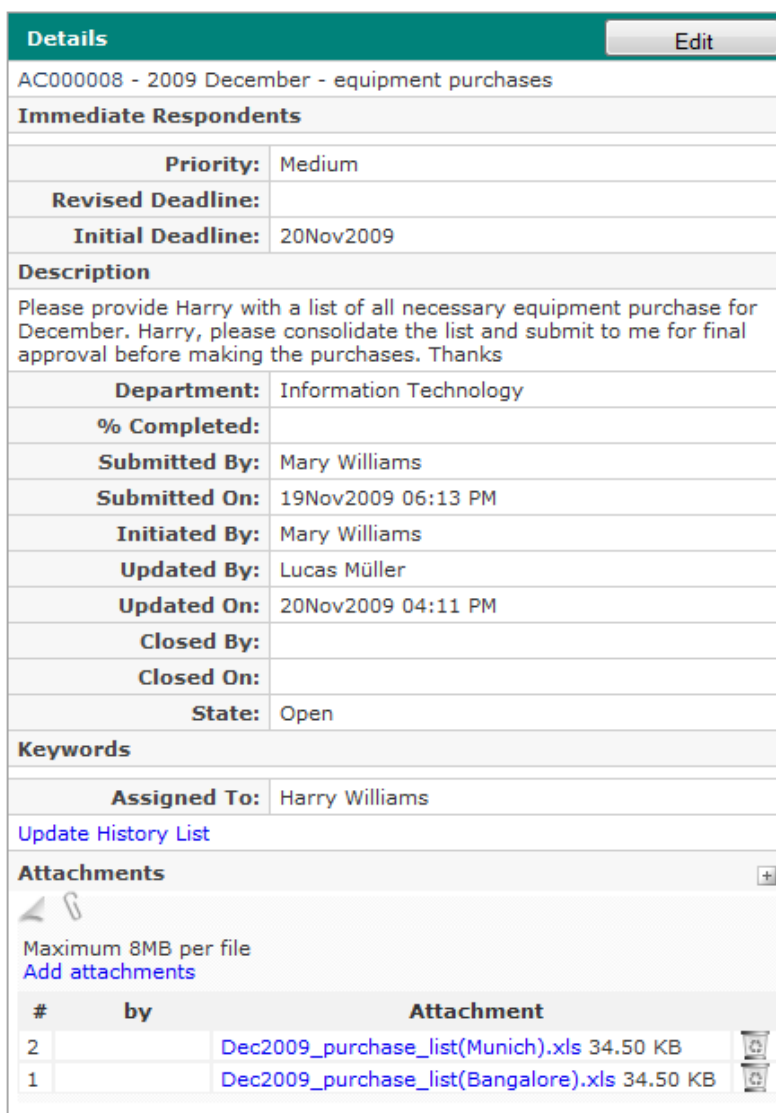


Figure 52: Edit Button in Details Column

Note: See individual module manuals for details on the edit item fields.

C. Immediate Respondents

Add users as immediate respondents by typing their names in the field, as shown below. Upon seeing the list of users filtered based on the letters typed, the user can either use the arrow keys and press the Enter key or left click to select a name. Names of multiple immediate respondents are separated by commas.

% Completed	<input type="text"/>
Immediate Respondents	Chris Jackson,Jowar Verma,Karan Basha,j
Keywords	Joseph Johnson
Initiated By	Joshua Garcia
	Jowar Verma
	Juan Carlos Hernandez
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Save & Close"/> <input type="button" value="Back"/>	

Figure 53: Immediate Respondents

D. Keywords

This can be used for tagging and indexing module items. It enables users to group and search for items sharing the defined keyword/s. To use this feature, simply add a keyword or tag for a specific item in the Keywords field, as shown below. Multiple keywords are separated by commas.

Immediate Respondents	Chris Jackson,Jowar Verma ,Karan Basha
Keywords	Equipment, Purchase
Initiated By	Mary Williams

Figure 54: Keywords

E. Initiated By

By default, the dropdown list displays the name of the submitter in the Initiated By field once the Add Item page is opened. Click Save if the same person is the submitter and initiator of the item. However, in instances where the initiator is not the one who submits the item, the submitter can select the name of the actual initiator from the dropdown list, as shown below. Note that clicking Save to save the item on either instance will disable the option to modify the Initiated By field, and only the Module Administrator can change the initiator upon the user's request.

Immediate Respondents	<input type="text"/>		
Keywords	<input type="text"/>		
Initiated By	<table border="1"> <tr> <td>Mary Williams</td> <td>▼</td> </tr> </table> <p style="color: red; font-size: small;">This field cannot be modified once you save this record.</p>	Mary Williams	▼
Mary Williams	▼		

Figure 55: Initiated By

F. E-mail Notifications

Users of teczo.com will receive daily e-mail messages informing them of new items, item updates, reports, issues and more, in modules where they have access. Users defined as immediate respondents will also receive notifications right after the submitter saves the item

to notify such person of the need for his immediate response to the item.

G. Deadlines

Users can easily set deadlines for items by clicking the Initial Deadline field in the Add Item page, as shown below. This opens a small calendar where users can set a date as the initial deadline. Note that clicking Save to save the item will disable the option to change the date of the initial deadline. Instead, a user can go to the Edit page of an item to set a revised deadline by clicking the Revised Deadline field, as shown below. After choosing a date for the revised deadline and clicking Save, the summary table will display the new date in the Latest Deadline column.

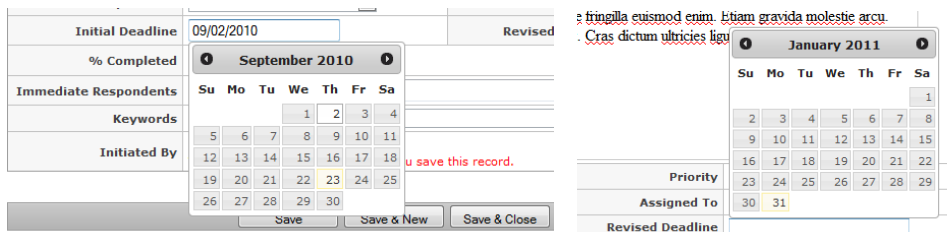


Figure 56: Initial and Revised Deadline

H. Editor Toolbar

The Description box of the Add and Edit pages is equipped with an Editor Toolbar for added functionality and convenience. Each button in the toolbar serves a different function, which may be viewed by making the cursor hover over the button. Click the button to execute its function.

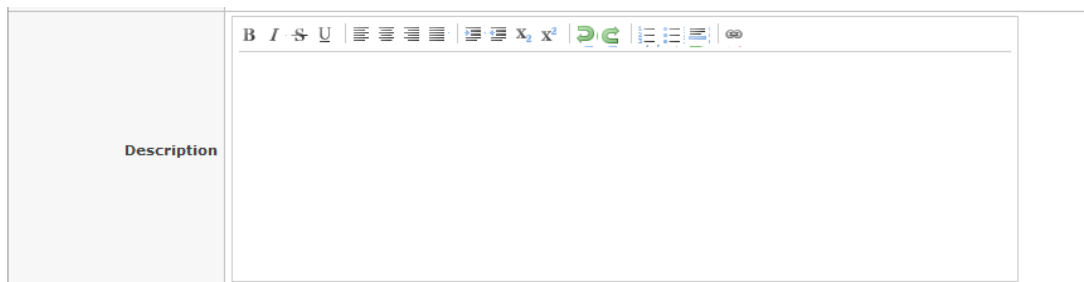



Figure 57: Editor Toolbar

Icon	Name	Description
B	Bold	Bold the selected text
<i>I</i>	Italicize	Italicize the selected text
ABC	Strikethrough	Used as part of a description or as indication of changes made to the text
<u>U</u>	Underline	Underline the selected text
≡	Justify Left	Align the selected text to the left
≡	Justify Center	Align the selected text to the center

	Justify Right	Align the selected text to the right
	Justify Full	Align the selected text to both the left and right margins, adding extra space between words as necessary
	Increase Indent	Increase the indent level of the text
	Decrease Indent	Decrease the indent level of the text
	Subscript	Create small letters below the text baseline
	Superscript	Create small letters above the line of text
	Undo	Undo last action
	Redo	Redo last action
	Numbering	Start a numbered list
	Bullets	Start a bulleted list
	Horizontal Rule	Insert horizontal line
	Hyperlink	Create a link to a Web page

I. Select Default User Groups or Customized User Groups

In creating or editing items, the user may click the  icon to view the list of available user groups. This feature helps simplify the assignment of access rights to users. Customized User Groups can be set by the user via the My Account Settings, while the Default User Groups can only be set by the System Administrator via the System Administration module.

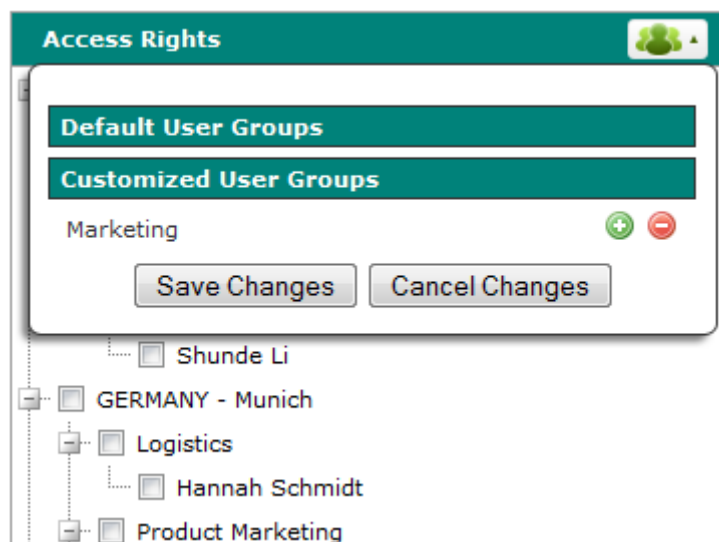


Figure 58: Default and Customized User Groups

- a. Click the positive “+” icon to add all users in a particular user group to the current access rights list of the item. *Note: If a user in a selected user group does not have access to the module, he will not be added to the item’s access rights list.*
- b. Click the negative “-” icon to remove all users in a particular user group from the current access rights list of the item.
- c. Click Save Changes to apply changes or Cancel Changes to cancel.

7.0. Supporting Functions

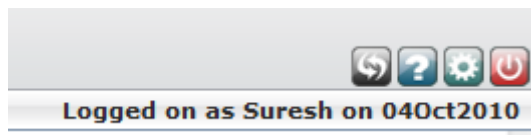


Figure 59: Supporting Functions

A. Transformation

A user with Module Administration rights can transform into Module Administrator using this feature. Click the Transformation button represented by the leftmost icon in the upper right corner of the module page to sign in as Module Administrator and access the module administration page. As Module Administrator, the user has rights to edit, write and read all items in specific modules where he has module administration rights. Updates, added items and comments posted by a user while on Module Administrator mode will be recorded bearing the user's Module Administrator name, which is set by the System Administrator via the System Administration module.

1. Upon clicking the button, the user will be prompted with a login page where he can login as Module Administrator using his username and password. *Note: Only logged in users with module administration rights can view and login through the Transformation button to access the module administration page.*



Figure 60: Module Administrator Login

2. Upon logging in, the Module Administrator is directed to the home page containing specific modules he has been assigned to administer.

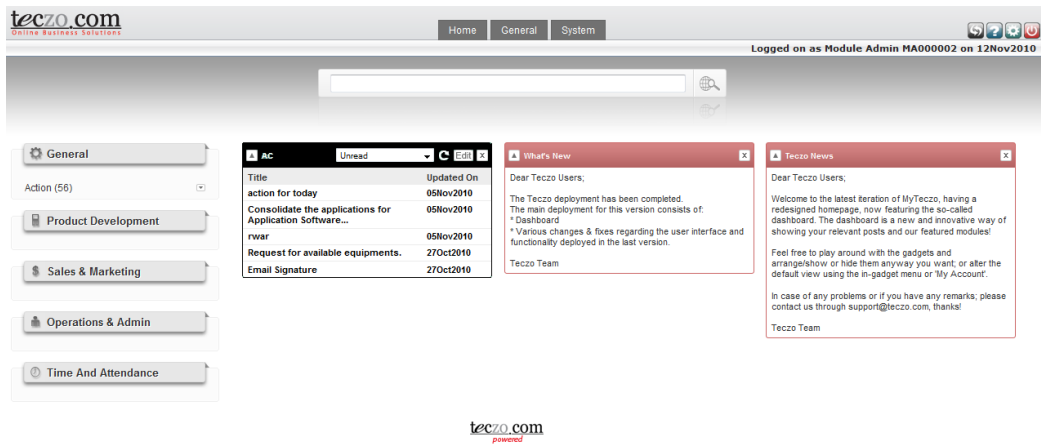


Figure 61: Module Administrator Home Page

3. A Module Administrator can revert to a regular user by clicking the Transformation button and logging in as a user.

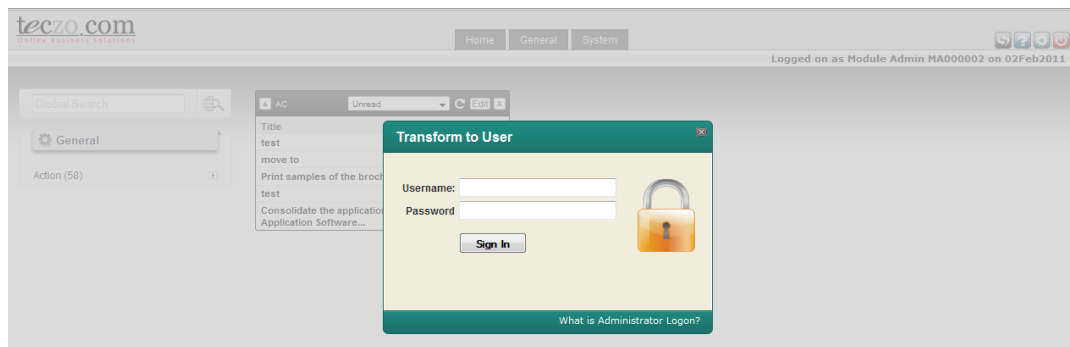


Figure 62: Transform to User

B. Help Page

Click the Help button represented by the Question Mark icon in the upper right corner of the module page to open the Help page. The Help page opens as a new window providing links to useful resources, including User Manuals, FAQs, Product Demos, Purchase and Tech Support Contact Information, which users need to navigate through the Teczo online system. Click the links to open the resource pages.

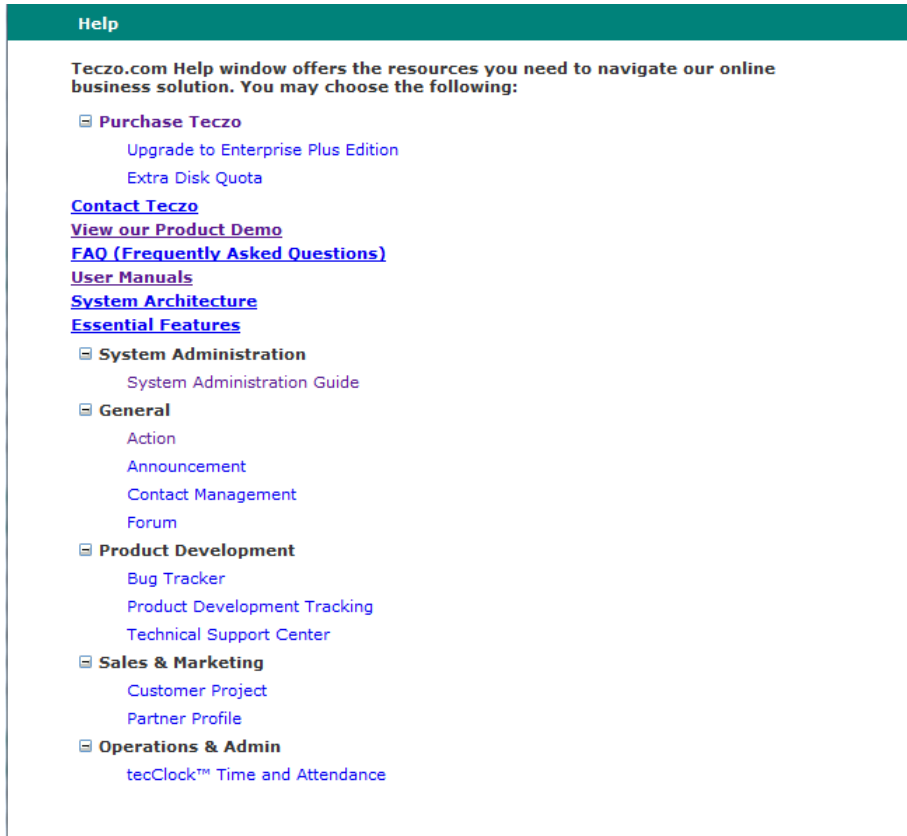


Figure 63: Help Window

C. My Account

The My Account page allows users to modify their Password, Language, Customized User Groups and Dashboard settings according to their preferences. The My Account button is represented by the Settings icon found at the upper right corner of the module page. *Note: See Section 3.0 for Dashboard settings.*

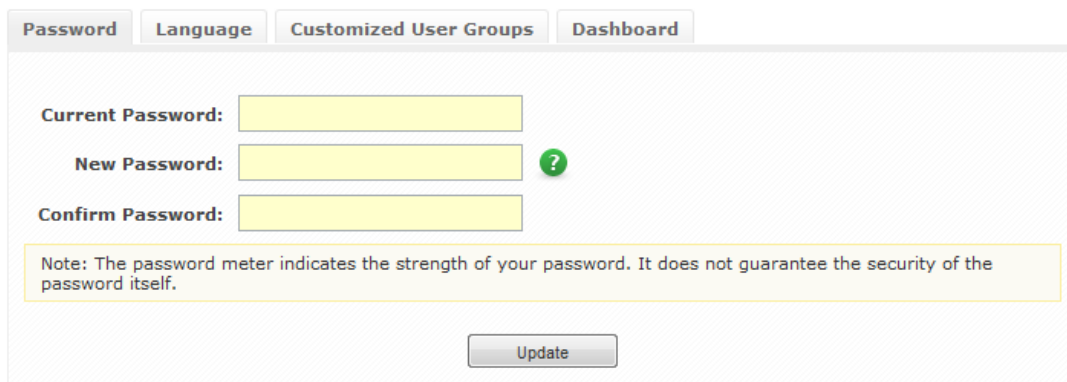


Figure 64: My Account Page

1. Changing the Password

For security purposes, the user is advised to change his or her password regularly. Teczo provides users with hints on how to increase the strength of their password. Likewise, companies have the option to select security measures in their subscription

package (Note: See System Administration User Guide).

- a. By default, the contents of the Password tab are displayed once the My Account Page is opened.

Figure 65: Password Tab

- b. The user is asked to provide his correct current password in the Current Password field.
- c. The user is then asked to provide a secure New Password. Here are some tips on how to create a secure password:
 - 15 characters or more are ideal for creating strong passwords.
 - Add complexity to your password by mixing uppercase, lowercase, numbers and symbols.
 - Try to create a unique acronym. (e.g. “To be fond of learning is near to wisdom” – Tbf0!n2w)
 - Include similar looking substitutions, such as number zero for the letter ‘O’ or ‘\$’ for the letter S. (e.g. “To be fond of learning is near to wisdom” – 2Bf0!\$n2w)
- d. To verify the new password, the user must retype the new password in the Confirm Password field.
- e. It is important to click the Update button to save and apply the changes.

2. Changing the Language

- a. In the My Account page, click the Language tab to proceed with the modifications.

Figure 66: Language Tab

- b. By default, the dropdown list in the Language tab will display the language set by the System Administrator. The user may change the language by selecting from the choices in the dropdown list. Note that Teczo currently offers its online system in English, Simplified Chinese and Traditional Chinese versions.

- c. It is important to click the Save button to save and apply the changes.
 - d. Click the Reset button to cancel any changes and to refresh the page.
- Note:** Clicking the reset button reverts the page to the My Account default view, which displays the Password tab contents.

3. Creating Customized User Groups

Teczo allows users to create Customized User Groups for easier assignment of access rights. In cases where users always create items for the same group of people, creating a customized user group is a practical solution enabling users to assign access rights more quickly.

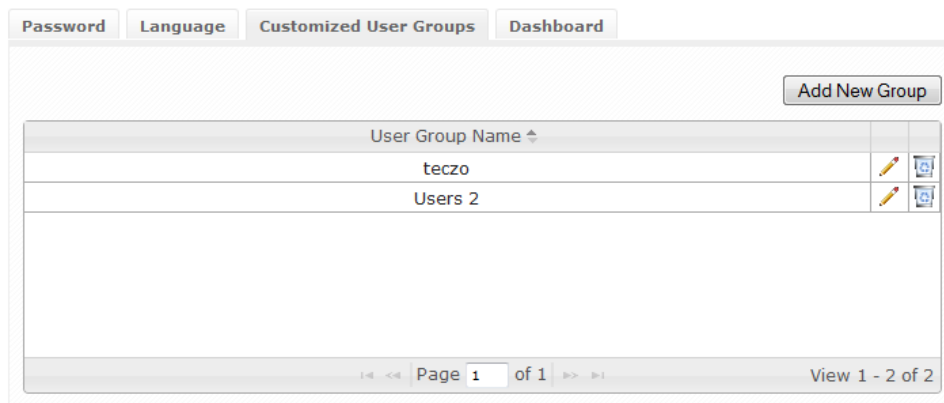


Figure 67: Customized User Groups Tab

- a. In the My Account page, click on **Customized User Groups** tab.
- b. Click the Pencil icon to edit any existing Customized User Group/s or click the Recycle Bin icon to delete any existing Customized User Group/s.

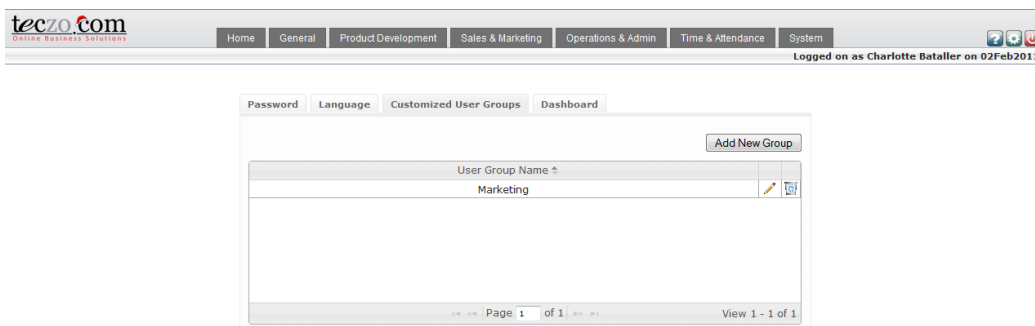


Figure 68: Edit and Delete Customized User Group/s

- c. Click on **Add New Group** button to add a new Customized User Group.

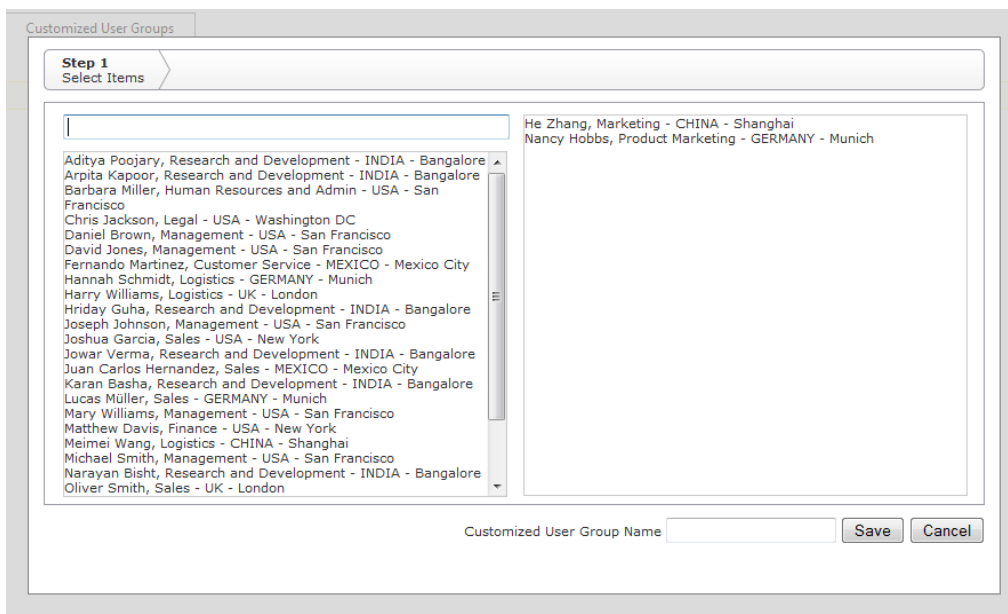


Figure 69: Add New Customized User Group

- i. Search for any user by typing his or her name in the blank field, as shown above.
- ii. Add users to the selected users list on the right by clicking their names from the list of all users.
- iii. Remove users from the selected users list on the right by clicking their names.
- iv. Create a name for the Customized User Group by typing the name in the blank field located at the bottom right portion of the box, as shown above.
- v. Click **Save** to complete creation of the new Customized User Group or **Cancel** to cancel creation and go back to the My Accounts page.

D. Paging

- a. The user can navigate through the different pages of each module using the Paging bar at the bottom of the summary table.



Figure 70: Page Navigation

- b. The Paging bar has page indicators for ease of use. Users can simply click a page number displayed in the bar to go to a page directly. Alternatively, the user can click the Next Page or Previous Page buttons to view the pages sequentially, or click the First Page and Last Page buttons to go to the first and last pages directly.

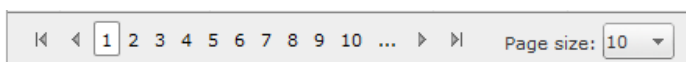


Figure 71: Page Indicators

- c. The user may also set how many records are shown in one page by choosing a value from the Page Size dropdown list.

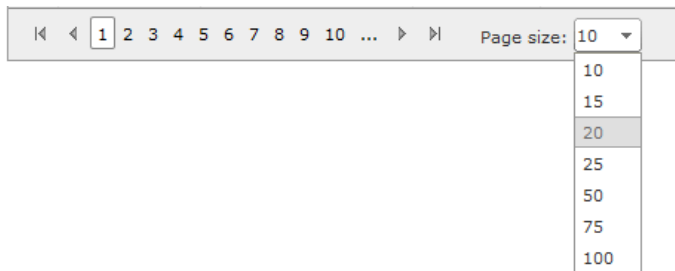


Figure 72: Page Size

- d. Located at the rightmost corner of the paging bar is the current page location of the user, including the number of displayed items in the page versus the total number of items in the module.

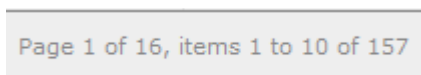


Figure 73: Current Page Location

E. Collapse or Expand Pane

The user has an option to collapse or expand the details page by clicking the Triangle button located on its middle top portion. The collapsed view displays portions of both the summary table and the details page, while the expanded view hides the summary table and dedicates the whole page to the item details.

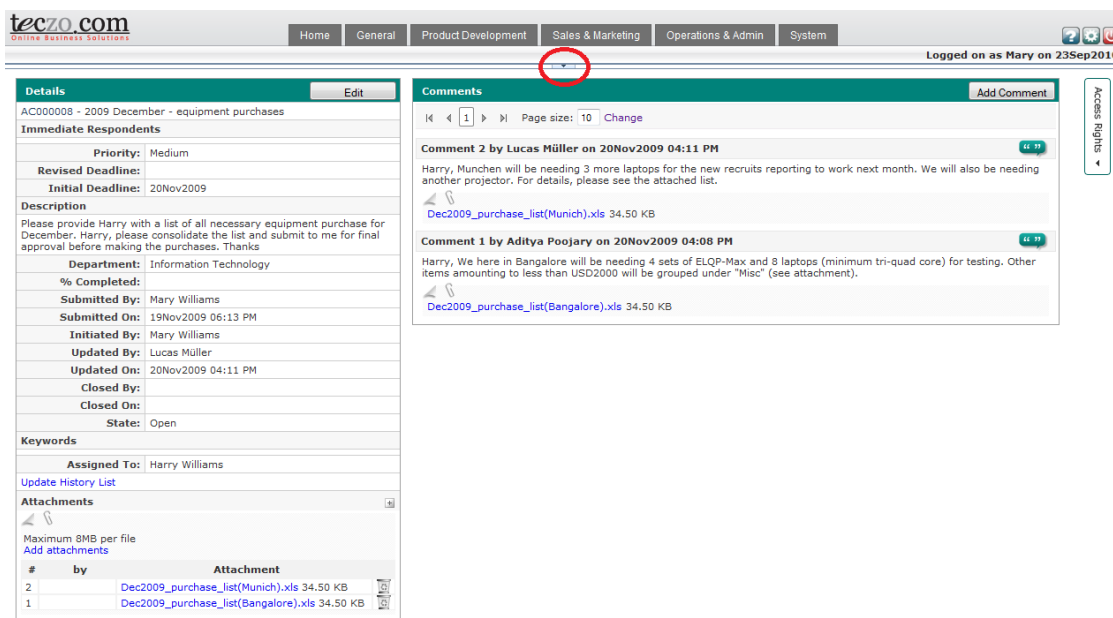


Figure 74: Expanded Details Page

8.0. Sign Out

For security purposes, users are advised to always logout after using the modules. The Sign Out button is located at the upper right hand corner of every page.

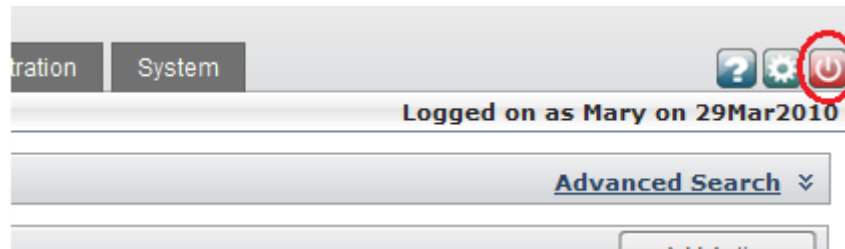


Figure 75: *Sign Out Button*

- A. To log out of Teczo.com, click on **Sign Out** button.
- B. The user will be directed to the User Login page upon successful sign out.