ACTIONitems

NOTES-TO-ACTION SOFTWARE

User Manual

Version 2.5

Updated: July 27, 2005

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About *ActionItems*^{TM}

ActionItems^{TM} is a one-of-a-kind software application made specifically for note-taking and action item tracking. It's the perfect information management tool that keeps the busy individual organized, focused and on schedule. Consider *ActionItems*^{TM} an electronic assistant that goes with you everywhere and archives info, timelines and initiatives at your fingertips for instant recall, retrieval and action.

Use *ActionItems*^{TM} as a personal journal to record notes of all kinds – from business meetings to grocery lists. Organize action items by people, projects, and groups. Send and receive items over your network. Easily track their progress and completion in one centralized location. Create custom reports that can be saved and shared. Sort to-do lists by importance and/or due date with the click of a mouse. Best of all, never, EVER again waste time re-typing hand-written meeting notes into your computer – *ActionItems*^{TM} turns your Mac into the ultimate note-taking and action item tracking device.

ActionItems^{TM} is the perfect workgroup solution, enhancing communication and follow-through between co-workers and direct reports. Action items and notes are easily shared between groups, complete with due dates and priorities, and will come up for review at the click of a button. *ActionItems*^{TM} archives person and project data indefinitely, so recall and tracking is a breeze for both employee and boss.

ActionItems^{TM} is a feature-rich program that allows the end-user to take command of their tasks and priorities. Start using *ActionItems*^{TM} and instantly improve your efficiency, organization and follow-up, at work and at home!

Features

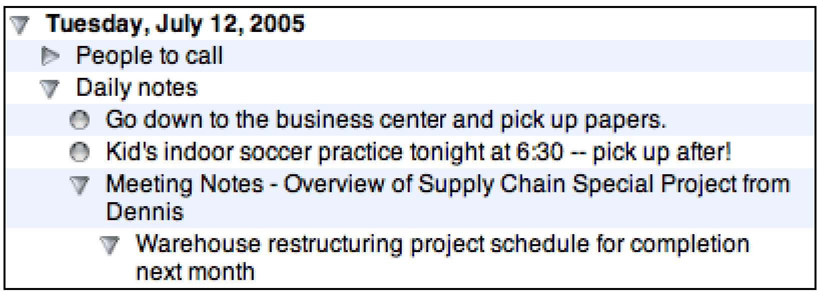
Below are detailed sections on the unique features inside *ActionItems*™ Notes-to-Action Software. Please read carefully, it is loaded with useful information!

Journal

The **Journal** is the primary place to record meeting notes, lists, thoughts -- anything you need or want to annotate.

Entering Journal Notes

ActionItems™ captures notes in outline form, generally regarded as the most efficient way of organizing information. To begin entering notes inside the Journal, click on the date and press "return". This automatically activates the first line. Enter your text, then press "return" to start the next item.



To indent, press the "tab" key; to outdent, hold the "shift" key while pressing "tab" – or use the Indent and Outdent functions under the "Outline" menu. Continue entering line items until your outline is complete.

Backing up *ActionItems*™ Data

To create a backup of your data file, go to "Backup Database" under the File menu. The window will prompt you to select a location for your backup. Backup can be done at any time to any location.

Restoring *ActionItems*™ Data

To restore your data file, go to "Revert to Database Backup" under the File menu. The window will ask you to select a backup file. This will replace your current file with the selected backup data, and requires that ActionItems be restarted for the change to take effect.

Think of the Journal as a spiral-bound notebook or sticky note, both places where one might traditionally write notes in long hand, with one major difference -- *ActionItems*™ turns linear, hand-written notes into dynamically sortable, trackable and distributable action items.

Viewing Journal Notes

The journal default view displays the present day. If you need to view a different day, simply use the calendar to select the desired date. You may also use the calendar to select multiple days for viewing in a combined Journal outline.

Viewing Consecutive Days in the Journal

In the Journal view, use the mouse to click the start date on the calendar. Drag your cursor through to the end date. Or, click on the start date, hold down the shift key and click on the end date.

Viewing Non-consecutive Days in the Journal

Click on the start date, then while holding down the command key, click the other dates individually.

When more than one day is selected, your journal outline will combine the individual daily outlines into one master outline.

Parents and Children

Any item that has one or more items indented beneath it is known as a "parent". The indented items below it are known as "children". Parent items can be expanded and collapsed for easier viewing by using your mouse to click on the arrow next to the item. You can also use the left and right arrow keys to expand and collapse when the parent item is highlighted.

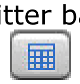
From the Outline menu, you can change the layout of your entire Journal outline for easier viewing and usage.

Expand All - opens the entire notes field

Expand To - expands all outline items to a selected level. Items below the selected level will be collapsed

Collapse All - collapses all outline items to the root, or top level.

The standard program window view includes the Journal on top, with the Navigation area along the bottom. For variable panel sizes, pull down/up on the vertical and horizontal splitter bars, which will minimize or enlarge the viewable areas.

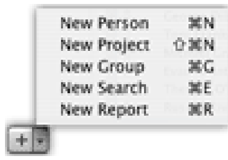
To completely expand the Journal, click on the  button in the lower left hand corner of the program window. This action hides the Navigation area, giving you a full screen view of Journal notes (you may also double-click on the splitter bar). To restore the original view, click on the icon again. Clicking on the  button will hide, and unhide the calendar.

People, Projects and Groups

The two major entities that receive action items are labeled **People** and **Projects**. In order to assign an item to a person or project, the person or project must first be set up inside the *ActionItems*™ database.

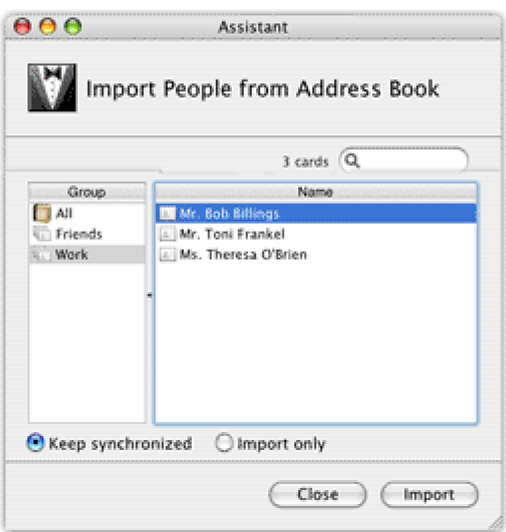
Adding a Person

1) Click on the arrow beside the"+" button and select "New Person".



2) Fill out the requested information in the dialog box and click "save". Or, to add another person, click on "Add Another". Continue in this fashion until you are done.

Note: in order to use ActionItems™ in a workgroup environment, you must create a record for yourself. Fill in your first and last name as others would use it, plus all other pertinent info. Then, highlight the record, and go to "Person/Identify as me". This will allow others on the same subnet to "see" you.



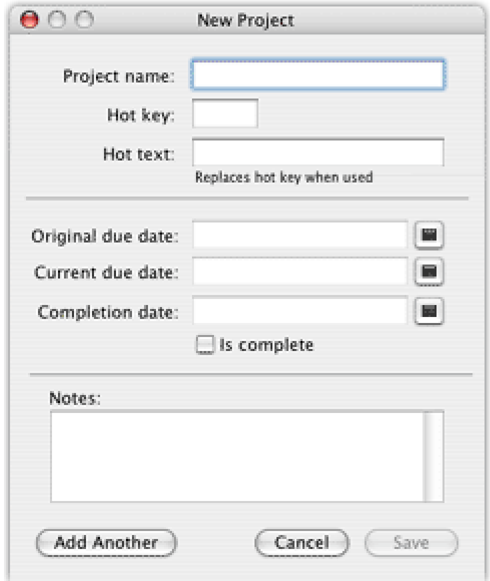
Importing Contacts from Address Book

To import contacts from your address book, select "Import" from the File menu. The Import Assistant will automatically pull in selected contacts from your address book, complete with all vital information. Select "Keep synchronized" so that anytime you change information in the Address Book, the info is automatically updated inside *ActionItems*™. Or, choose "Import only" to download the data with no linkage.

To access the address book for a particular record from inside *ActionItems*™, double-click the person's name and click the "Open in Address Book" button.

"Hot Key" designations may be entered for each person at this time. For more information on Hot Keys, **see page 13.**

Adding a Project



1) Click on the arrow beside the"+" button and select "New Project".

2) Fill out the requested information in the dialog box and click "save".

"Hot Key" designations may be entered for each project at this time. For more information on Hot Keys, **see page 13.**

ActionItems^{TM} keeps track of original due dates, revised due dates and completion dates for each overall project, as well as any notes you may wish to keep on file. The "Notes" field is the perfect place to capture a general description of the project, how it came about, and its stated purpose and goals.

Creating Groups

Groups are the perfect way of organizing related people and projects, such as Marketing, Family, Hobby, etc. People and Projects can belong to more than one group.

1) Click on the arrow beside the"+" button and select "New Group".

2) Type the name of your new group and click "OK".

People and Projects can be assigned to Groups by performing a simple Drag and Drop. You may create new People and Projects while inside the group; they will be automatically added to that group.

Creating "Favorites" for People and Projects

ActionItems^{TM} allows you to quickly access frequently viewed outlines by listing them across the top of the program window, otherwise known as the "Favorites" bar. A quick click on a header takes you to the desired outline. The Journal is the only default favorite, however, recently viewed People and Projects will appear across the top as you view them. You can customize the number of recent items displayed as favorites. You may also create permanent favorite status for frequently viewed outlines, change the display order of favorites, and delete favorites.

Recently Viewed Items

ActionItems^{TM} will automatically display the most recently viewed People or Project outlines across the top window, along with the Journal. To adjust the number of recently viewed items displayed as favorites, go to "General" in the "Preferences" menu. Select a number between one and nine in the clickable window.

Creating Permanent Favorites

To create permanent favorites for frequently viewed People or Projects, simply drag the item between the divider bars to the right of the "Journal" header. All headers appearing between the bars are permanently displayed for easy access.

Changing Display Order/Deleting Favorites

To move favorites to the left or right, perform a drag and drop until all titles are in the desired position. You can also remove a favorite by dragging it outside the divider bars until the item "ghosts". It will disappear upon release. The favorite will now be displayed only when it has been recently viewed.

ActionItems™ allows you to organize, store and retrieve data much as you would with a paper filing system. Keep "folders" on people and projects, group related items in larger "Group" folders, and store frequently accessed data at your fingertips via the "Favorites" feature.

Navigation Area

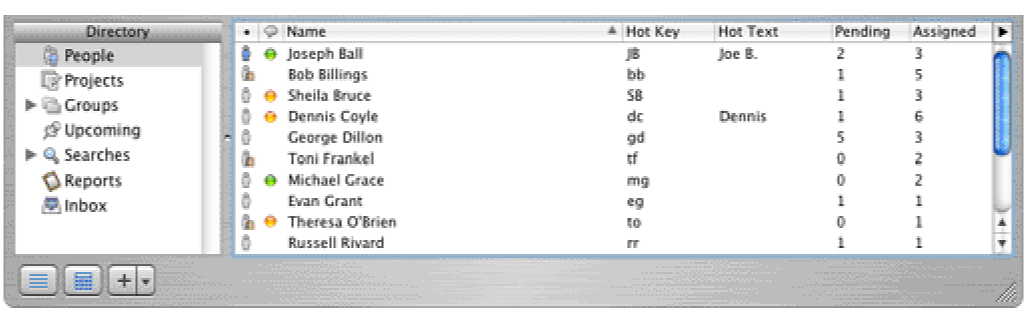
The lower half of the program window is referred to as the Navigation area, which allows you to easily switch between views and functions. Navigation consists of two panels: **Directory** and **Listing**. The viewing area of each panel can be adjusted both horizontally and vertically via the splitter bars. Collapse the area completely when working on your outlines; expand it to navigate to different views, to set up new People and Projects, and to send and receive **Live Action Items** (see page 17).

Directory

From the Directory you can select a group, project or person, click to view Upcoming Items, perform and access searches, access reports and report templates, and check your *ActionItems*™ Inbox.

Listing

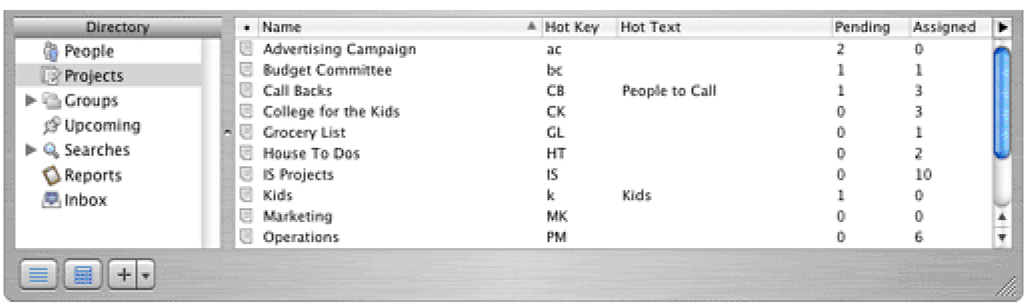
Use the black arrow in the upper right hand corner to add/delete viewable columns. You can also change the display order of the columns by performing a drag and drop to the desired location.



People

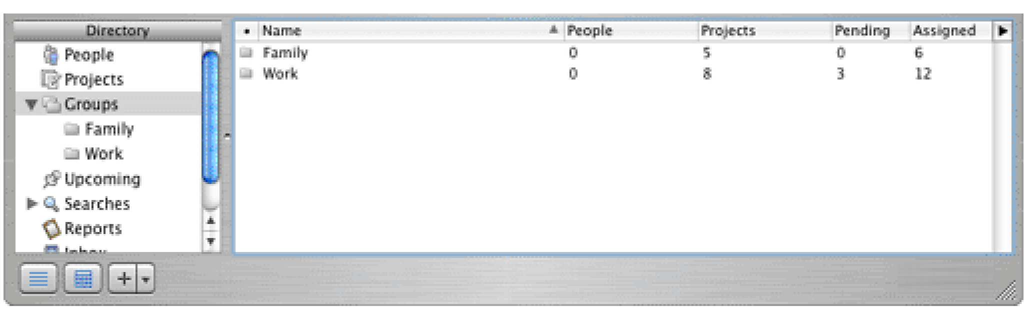
When "People" is selected inside the Directory, the Listing panel will display a list of all people entered into your *ActionItems*™ database, along with their respective Hot Key, Hot Text (if entered), number of pending and assigned items, and online status (if using in a workgroup situation). Status bullets for people appear as follows:

> **Your personal record:** each person should have a personal entry, created in the normal fashion **(see page 7).** Highlight your personal record, then select "Identify as Me" under the "Person" menu. The icon next to your name will appear in blue.
>
> *Note: designating a record as "you" is critical when using ActionItems in a workgroup situation. This will enable you to send and receive action items amongst other ActionItems™ users.*
>
> **Imports from address book:** will appear with a small address book icon. Unless on your network, these people are not able to send or receive Live ActionItems **(page 17),** but you may create and maintain outlines for them.
>
> **Users on the local network:** When a local user has their *ActionItems*™ software running, their bullet appears in green; when offline, the bullet disappears. Users must have their program open in order to receive Live Action items, otherwise, items will remain in your Pending with a yellow button. For more on Live Action Items, **see page 17.**



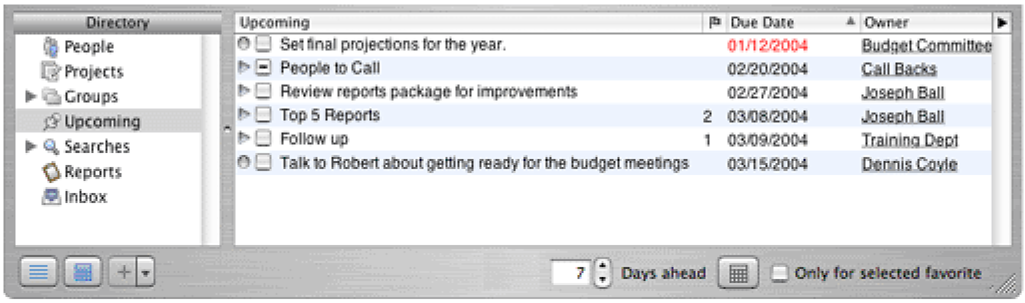
Projects

The Projects selection inside the Directory results in a list of all created Projects inside your *ActionItems*™ database. Use the black arrow to display additional info, including Hot Key, Hot Text, number of pending and assigned items, original due date, current due date, and date completed.



Groups

Select "Groups" inside the Directory to create custom groups, such as Family, Marketing, Hobby, etc. Expanding "Groups" will also allow you to select a specific group to view. Use the black arrow to display additional info, including Hot Key, Hot Text, number of pending and assigned items, online status, original due date, current due date, and date completed.



Upcoming

Selecting "Upcoming" will display all items due within the selected timeline. Sort upcoming items by Owner, Due Date and/or Priority by clicking on the respective header. To view Upcoming items for a particular Person or Project, select "Upcoming" from inside the Directory, and then click "For current selection" along bottom of window. Items may then be sorted by Owner, Due Date and/or Priority by clicking on the respective header.

If you are in the Journal and select Upcoming, you will see a list of all items due across all people and projects.

Search

ActionItems™ searches your data for specific items with a variety of selected criteria. Searches can be saved for re-use.

Select "New Search" from the file menu. Choose your search criteria and enter your text string in the area provided. You may add additional criteria by clicking on the "+" button. When your selection is complete, click "Search".

Reports

Allows you to run a "QuickReport" template, create a custom report, and run saved custom reports. For more on reports, **see page 21**.

Inbox

Displays all items that have been assigned to you via "Live Assign". For more on Live Assign, **see page 17**.

Assigning Action Items

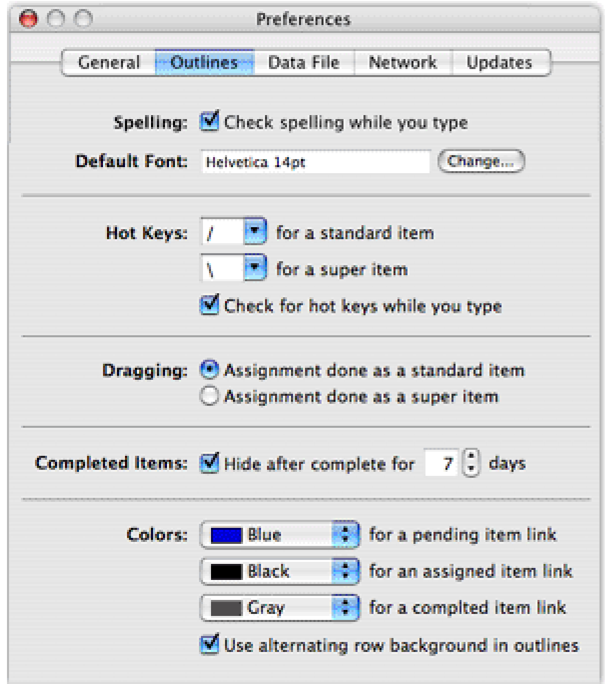
Items can be assigned to various people, projects or groups by utilizing the built-in drag-and-drop features of *ActionItems*™, or via the use of "Hot Keys".   Both are incredibly easy to use, and are best suited for certain applications.

Establishing "Hot Keys"

A "Hot Key" is shorthand for a particular person or project. Hot keys instantly assign ownership to items as you type, and if desired, inserts "Hot Text" inside the item. Hot Keys consist of a symbol (/, etc.), followed by a short text string (the initials of the person or project, or a short name, for example).

You can designate the hot key symbol of your choice inside the Preferences area under the *ActionItems*™ menu (see window, right). The text string is entered at the time a person or project is set up, or after import. Use a different symbol to create "standard" action items, and "SuperItems". The default Hot Key symbols are "/" for a standard action item, and "\" for a SuperItem.

For information on SuperItems, **see page 14**.



Example:
For a person named "Joseph Ball", choose the hot key designation "JB", and hot text designation as "Joe B.". Let's assume you've established your hot key symbol as "\".

To assign an item to Joseph Ball while typing in the Journal or an Assigned Outline, enter "\JB" anywhere in the item.

As the program recognizes the hot key, it will instantly replace it with hot text (if entered), and a copy of the item will instantly appear in Joseph Ball's "Pending File". You will also see Joseph Ball's name appear in the "People" column next to the item.

You now have an action item in Pending, ready to be assigned!

ActionItems™ prevents you from using the same hot key designation for more than one person or project, ensuring the integrity and cleanliness of your data!

Drag and Drop

Drag and drop is another way to assign an item to a person or project that is currently visible in the Listing window. Dragging and dropping an item onto a Person or Project puts that item into their "Pending" outline for review. Items may then be formally assigned, amended or deleted (more detail below).

Hot keys are a timesaver because you can send an item to pending for a person or project without any extra steps. Simply type their hot key inside the item and it's all taken care of for you. Use "hot text" for things like callbacks, etc., where the project or person's name makes sense inside the item (see example above). *Note: you have the option of disabling the HotText feature if so desired. Leaving the hot text field blank will prevent text from entering into the item.*

SuperItems

Items may be assigned to more than one person or one project. They may also be assigned to both people and projects at the same time. To do this, simply drag and drop the item to each entity you would like to assign ownership, or enter as many hot key designations as required.

When assigned to multiple entities, the items exist independently of each other – changes to the item in one outline will not change it in a different outline. You may, however, choose to link the items together by creating a "SuperItem". SuperItems are useful when assigning an item to more than one owner. Changes to the original item will automatically take place wherever the item exists inside your database.

Creating SuperItems

SuperItems are created by using a different Hot Key signifier as designated in the Preferences window **(see page 12)**. SuperItems are differentiated from a standard action item by a blue bullet point (versus grey for a standard item). If an item is assigned to a project or person as a SuperItem, the person or project link will appear in italics.

Modifying and Unlinking SuperItems

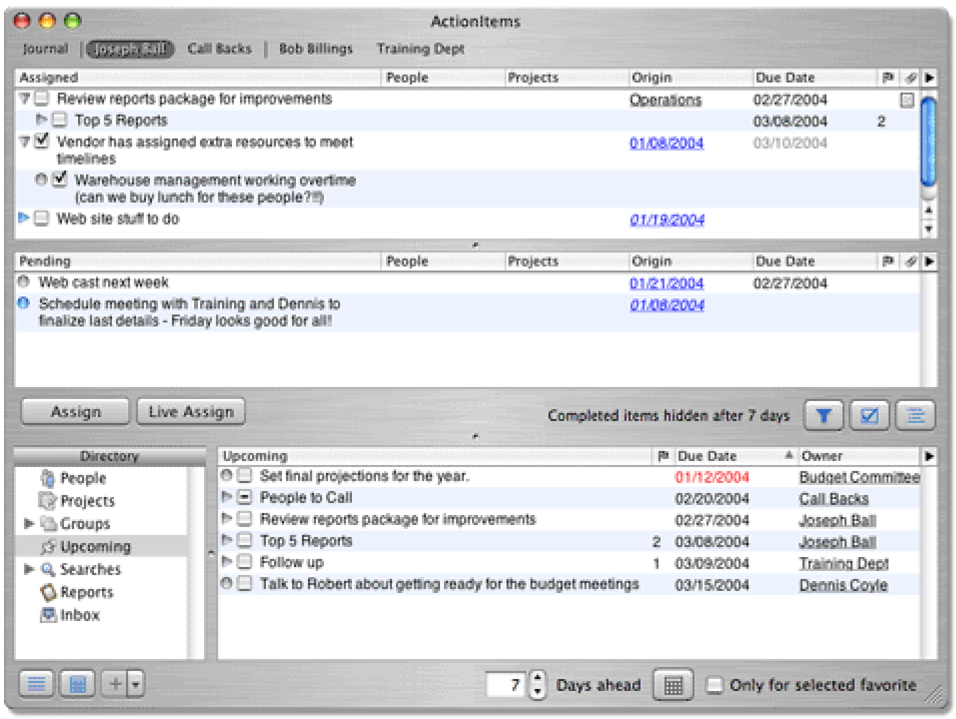
To modify a SuperItem, click on the link in the "Origin" column, which takes you to the source notes for that item. Modifications here will transfer to all outlines where the item also exists. SuperItems cannot be changed from inside individual outlines – only at the source. However, you may unlink SuperItems by highlighting the item and selecting "Unlink from Source" from the "Outline" menu. That particular item is now independent from the others, and may be modified/deleted without affecting the rest. The others will remain linked and behave accordingly. In other words, detaching from the other SuperItems makes the item behave like a standard item.

Create a "standard" action item when assigning an item to only one person or project, or when you might like to modify the items independently of one another. Use a "SuperItem" when you want to assign items to more than one person and project, and when you want changes to one item to appear across all people and projects. You may change the behavior of drag and drop items so that all items dropped are SuperItems by default, by selecting this option inside the Preferences/Outline window.

Pending

Pending is a review area, where you can perform a final check of an item before officially assigning it to a Person or Project. Action items sent to the Pending area are still dynamically linked to the source item in the Journal. If the Journal entry is amended, those changes will be reflected in the Pending item.

Remember that items do not necessarily have to originate in the Journal – you can create an item from inside an Assigned Outline, and assign it to other entities. It will go to their Pending Outline, maintaining a link to the source item until formally assigned.



Pending is visible inside all outline views, except for Journal. Once an item is in Pending, it can either be officially assigned to a Person or Project, or deleted.

> **To Assign an Item –** highlight item by clicking on it, then click "Assign"
>
> **To Delete an Item –** highlight item by clicking on it, then press "Delete" (this will not delete the source note – only the item in pending.)
>
> **To Assign via "Live Assign" –** please see next section below

Text cannot be changed from inside the Pending area, however, you may assign due dates and priorities from inside Pending (these functions can also be performed later inside Assigned Outlines). Items can be amended for spelling or content when assigned to a Person or Project, or from inside the original notes. Clicking on the origin date from inside Pending will take you back to the source item.

Once a standard item leaves Pending and has been assigned, it becomes independent of it's origin. Changes made to the original note inside the Journal will not be reflected in an assigned outline. If you wish for this to take place, you must create a SuperItem.

The true beauty of the "Pending" area is the ability to weed out real, actionable items versus items you may decide not to act upon. Many ideas seem worthwhile initially (in a meeting, etc.), and upon later review, become less viable. It also allows you to prioritize new items against existing items, and vice versa. Use "Pending" as a holding area for items still to be discussed with its potential owner(s). Once Pending items are discussed and reviewed, they can then be amended, assigned, and/or deleted.

It is logical to assign priorities and due dates from inside Pending, before it is assigned, since they will travel with the item to the intended recipients' outline.

ActionItems™ Live

Anyone on your local network (subnet) is capable of sending/receiving and accepting/rejecting items via the *ActionItems™* Inbox feature, making *ActionItems™* the ultimate workgroup solution!

As co-workers launch *ActionItems™*, it turns the bullet next to their name in the Listings window to "green". This person can now receive items into their Inbox. If the intended party is off-line, any sent messages remain in your Pending until that person signs on.

Preparing the Workgroup to Send and Receive Items

Before sending and receiving action items between individuals, several important steps must be taken to ensure that each person in the group is recongnized.

1. Each person should have a personal entry in their own *ActionItems™* database, created in the normal fashion **(see page 7)** and identified as themselves. To do this, highlight your personal record, then select "Identify as Me" under the "Person" menu. This allows others to "see" you on the network. When done, the icon next to your name will appear in blue.

2. In order to "see" another person using ActionItems™, their name must appear in your database, and in their own personal record, in exactly the same way. For example "Peter Smith" must be entered as "Peter Smith" in all places, not as "Pete Smith" in one program and "Peter Smith" in another.

3. Each person must enable the networking feature from inside their Preferences window. To do this, simply go to Preferences/Network/Receiving items, and check the box next to "Allow others to send items to me".

If all of the above is done correctly, a green dot appears in the "People" listing identifying each user that is visible. Should you be "missing" someone in your group, please ensure that all steps above have been taken.

Sending Live Action Items

To **Live Assign** an item to someone on your local network, go to their Pending area and click on an item. Next, click on "Live Assign". The item will remain in Pending but the bullet will change color to "yellow".

If the recipient has *ActionItems*™ running, the item will appear in their Inbox within seconds. If they are off-line, it will remain in your Pending until they become available and either accept or reject it.

If a person accepts a sent item, the bullet will change to "green" and the item will move to its Assigned Outline. If the person rejects the sent item, the bullet will become "red", and the item will remain in your Pending.

From there, you may choose to delete it, re-send it, or do a "non-Live" assign.

NOTE: Modifying the OS X Firewall Setting

If you are using the OS X built-in firewall and would like to receive action items over the network, you need to add an entry for the *ActionItems*™ application in your firewall settings. Inside "System Preferences", under "Internet and Network", click on "Sharing" and then go to the firewall tab. Click on "New." You will be presented with a sheet asking for the port information. Select "Other" for the Port Name and type in the port number that ActionItems is using. By default, the port number used by *ActionItems*™ is 5351. Finally, type in "ActionItems" for the Description and click "OK".

Viewing, Accepting and Rejecting Live Action Items

Your Inbox lets you know how many items are in it at any time, by displaying a number to the immediate right. To view items, simply click on your Inbox. A complete listing of items appears in the Listings window, along with *Sender, Due Date, Priority and Received Date.*

To accept an item in your Inbox, highlight it and click "Accept". When accepted, the bullet becomes "green", and the item moves from your Inbox to your personal assigned outline.

To reject an item in your Inbox, highlight the item and click "Reject". This removes it from your Inbox and changes the bullet color to "red" in the sender's Pending outline.

Never again will an important work project get lost between the inter-office jokes, junk mail solicitations, and endless carbon copies found in your e-mail Inbox today! Important directives are managed by *ActionItems*'™ own Inbox technology, keeping them out of the clutter and in plain sight.

Working with Assigned Action Items

Once you have People, Projects and Groups composed, and action items assigned, it is now time to monitor progress. *ActionItems™* allows you to do this through both the **Assigned Action Items** outlines, and in the **Upcoming** panel.

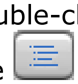
Assigned Action Items Outlines

"Assigned Action Items" Outlines are a compilation of notes and action items for a Project or Person. Here is where items are organized, prioritized, amended and monitored for progress and completion.

Viewing Assigned Outlines

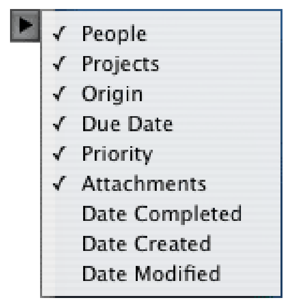
Assigned Outlines are viewable by clicking on the person or project in the Favorites bar across the top of the program window, or by clicking on "People" or "Projects" inside the Directory, and selecting a record in the Listing panel.

Expanding/Contracting Viewable Area

To expand the viewable area, pull down or double-click on the splitter bar between Assigned and Pending, or click on the  button to collapse the Pending area. To restore the original view, click on the icon again.

Column Headers

Various columns are available for display inside each Assigned Action Items outline. You may display all, or some of the columns at any given time by selecting or de-selecting them in the pull down menu along the right hand side of the column header row.



People – displays any additional people the item may be assigned to. Clicking on a person listed in this column will take you to the corresponding item from inside their outline. If there are no additional item owners, the column remains blank.

Projects – displays any additional projects the item may be assigned to. Clicking on a project listed in this column will take you to that item inside the project outline. If there are no additional item owners, the column remains blank.

Origin – clicking on the date (for a Journal entry), or outline name (for an Assigned Outline) in the origin column takes you to the source notes inside the Journal area or Assigned Outline. This is helpful when researching the context of an item, or when amending a SuperItem.

Due Date – shows the assigned due date for the item. If a due date has not yet been assigned, you may assign one by clicking in the column and selecting a date on the pop-up calendar. *Note: items will not appear in "Upcoming" unless a due date has been assigned. Assigning a due date makes an item more trackable.*

Priority (⚑) – *ActionItems™* gives you the ability to assign priority codes to items inside an Assigned outline. To assign a code, click in the column under heading (⚑), and assign a code from 1 – 5, with one being the greatest. You may change the Priority codes from numeric to alphabetic from inside the General Preferences window.

Attachments (📎)– To attach an external document to an item, simply click in the column under the heading (📎). The dialog box will prompt you to create a path to where the document is stored. Once completed, a page icon will appear in the links column. Clicking on the icon pops-up a menu so you can open or delete existing attachments, as well as add another. You can also drag and drop a file onto the item's attachment column.

Date Completed - displays item completion date.

Date Created – displays item creation date.

Modified – displays date the item was last modified.

Changing Order of/Adding/Removing Columns

To change the order of the columns, simply drag and drop them to the desired position. To add or remove any of the columns, click on the arrow to the right of the column headings and either activate or deactivate the header in the drop-down box.

Changing Colors of Status Codes

The default colors of status codes are as follows:

Pending items:	Blue
Assigned items:	Black
Completed items:	Gray

Use the *Preferences* window to customize colors of these links.

Once you have established an outline with assigned items, feel free to insert, delete, move, and edit items as you see fit.

Inserting an Item

Place the cursor at the end of the item above where you want the new one to appear, or select the item, and press "return". A new item is created at the same level as the previous item. Press "tab" or "shift-tab" to indent or out-dent as desired. Once the item is complete, you can perform any of the functions above, including due dates, priority codes, etc.

Deleting a Standard Item

Highlight the item, or use the arrow keys to navigate to it. Once the item is highlighted, you can either press "delete" or you can select "Delete" from the "Edit" menu. You can also insert the cursor at the end of the item and backspace through it.

Deleting a Super Item
To delete a single occurrence of a "SuperItem", first highlight the item and select "Unlink from Source" from the "Outline" menu. You will be able to delete this item without affecting the other items. To delete all occurrences of a SuperItem, click on the "Origin" column to get to the source note. Deleting this item will delete all occurrences.

Moving an Item
To move an item, click on the bullet (or arrow) and drag the item to a new location. *Note: Dropping an item to the left of another item's bullet* ***will add it at the same level*** *while dropping on the right side of the bullet* ***will make it a child*** *item.*

Editing an Item
To edit an item, click inside the item at the appropriate spot and enter your changes. If the item is highlighted, you can press the Space Bar to begin editing and Esc to stop.

Use **Assigned Outlines** to collect notes and action items regarding a project/person, make changes on dates, priorities, etc. Start directly inside the assigned outline when the notes are specific to that person or project. Link external documents and files – keep all pertinent info under one easy header. Retrieval becomes a breeze – no more hunting for related documents or ancillary notes!

Upcoming
The Upcoming view allows you to monitor and sort all action items coming due for a particular project or person. It also provides a global view of all items across all categories.

Items belonging to a particular person or project can be viewed by clicking on the "Upcoming" icon in the Directory while inside a specified outline. Please be sure the "For current selection" box at the bottom of the window is selected.

Upcoming items for *all* Projects and People can be viewed by making sure the "For current selection" box is de-selected. All items with due dates within the days ahead selection will appear inside the viewing area (see screenshot below).

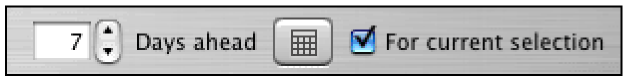
You can adjust the time frame from which the action items are displayed by using the slider box or calendar controls at the bottom of the window.

Adjusting "Days Ahead" View

To adjust the "Days Ahead" view either within or beyond the default 7 day window, you have two options:

1) Click the arrow box up or down until the desired number appears in the window, or,

2) Click on the calendar icon and select a fixed date.



Sorting Items

Items inside the "Upcoming Items" window can be sorted many ways. Click on a column heading to sort in either ascending or descending order.

To change the order of the columns, simply drag and drop them to the desired position.

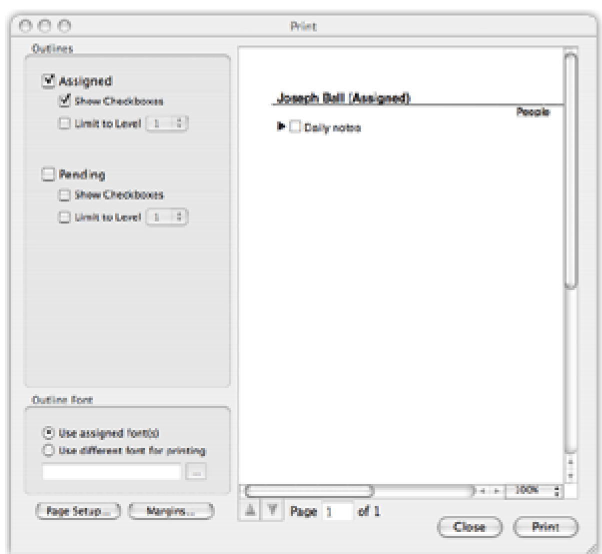
Use **Upcoming** as your 'to do' list. Sort by and review upcoming dates for either an individual, or for all projects/people. Arrange items by due date, people, projects and priority code. Remember, you can adjust the number of days ahead you are viewing – by day, by week, by month or longer, or by a static deadline.

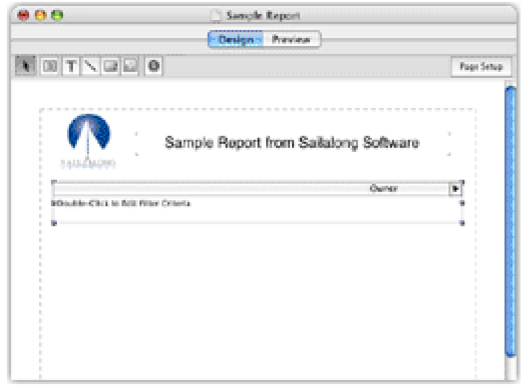
Printing and Reporting

ActionItems™ outlines can be printed as outlines, as reports or saved as a .PDF for sharing and distribution.

Printing

ActionItems™ allows you to print any of the outlines -- Journal, Assigned, Pending or Upcoming. Select Print from the File menu. The print dialog allows you to select an outline to print from the outlines you are currently viewing. You can select the number of levels of children to print, whether or not you want to print the checkboxes and the font used.





Reports

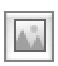
To create a report, select "New" from the Reports menu. A blank report template will appear, complete with design tools across the top of the window. Moving your cursor over each tool will display its name. Functions are described below:

Move Tool: Use the move tool to select, move and/or resize graphic elements, outlines, and text boxes. To move more than one element at one time, click and drag to draw a box around the desired items. Or, click on the first item, and shift-click on the others until all are highlighted, then move accordingly.

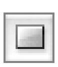
Insert Outline Tool: Use this tool to "draw" an outline for a custom report. The search criteria selection window will automatically appear, with a series of filters. Select the desired criteria, and add new filter levels by clicking the "+" button. You may remove selected filters by clicking the "-" button to the right of the row. Continue selecting criteria until you are done, then click "OK". Next, choose the columns you wish to show by clicking on the back arrow in the upper right hand corner of the outline, and checking off the appropriate headers. The complete outline will appear in "Preview" mode.

Insert Text Label: Use this tool to draw a text box for headers, company name, etc. For info on text selection, etc. see the "Report Inspector" section below.

Insert Line: Use this tool to draw vertical, horizontal and diagonal lines to enhance your reports. For info on line width, color, opacity, etc. see the "Report Inspector" section below.



Insert Image: Use this tool to insert any image into your report.



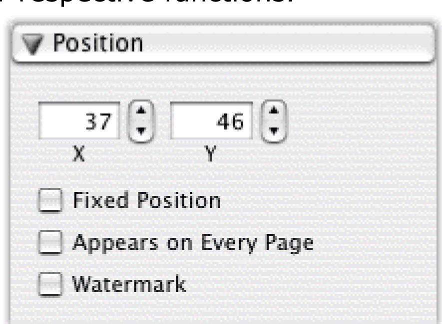
Insert Rectangle: Use this tool to draw squares and rectangles. For info on line width, color, fill, opacity, etc. see the "Report Inspector" section below.

Show Inspector: Click on "Show Inspector" to bring up the Report Inspector palate. To learn more about the Report Inspector, please see below.

Report Inspector

The Report Inspector is a floating palate used to select and adjust the many design elements of your reports. Below is a complete description of the Report Inspector controls and their respective functions.

Position: Displays the position of a selected outline, text box, or graphic element in relation to the upper left

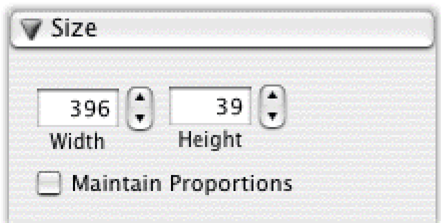


hand corner of the report sheet. Increments are measured in pixels. The value will change as the item is moved on the page. Additionally, you may move the element by changing the values in the boxes via the up and down arrows.

Fixed position: anchors element to its position on the page. Useful for headers and footers.

Appears on every page: repeats element on every page – useful for logos, stylized headers and footers.

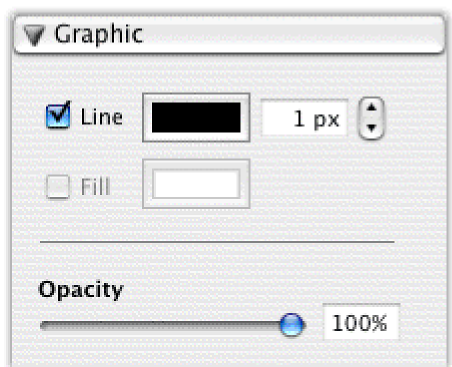
Watermark: adds opaque quality to graphic element, so that type may overlay. Useful for logos, etc.



Size: Displays the size of a selected text box, or graphic. Increments are measured in pixels. You may resize the element by changing the values in the boxes via the up and down arrows.

Maintain Proportions: select this for distortion-free resizing of photos, logos, etc.

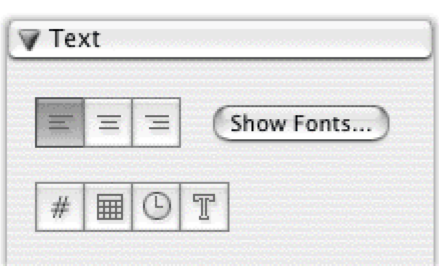
Graphic: Allows you to adjust line width and color, and fill color with an almost endless selection of enhancement capabilities.



Line: resize width by adjusting value in the box via up and down arrows, or by entering a value inside the box. Adjust the color by double-clicking on the rectangle and bringing up the color tools.

Fill: Click on the gray scale slider to adjust brightness. Choose from a variety of color enhancement/selection tools via the Color Palette as shown, right.

Opacity: move the slider bar to achieve a translucent quality to the highlighted element.



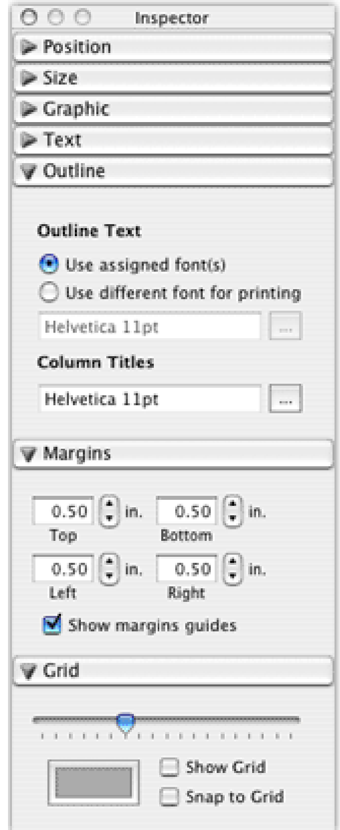
Text: Use the tools inside the text area to choose font, color, size, alignment and more. Insert page numbers, date stamp, time stamp and template text.

Outline: Use the outline controls to adjust font selection and size inside your outlines and column headers. Pull up a list of all available fonts and styles by clicking the box to the right of the text selection window.

Margins: The margin controls allow you to adjust top and side margin size, and elect to show or hide margin guides.

Grid: Clicking on "grid" will create a background on your report to use as a guide for alignment purposes. The grid will not appear in "Preview" mode, nor will it print.

Selecting "Snap to grid" will "magnetize" the grid line, helping to line up various elements in the report creation process.



Once your report is created, you will want to preview them before printing. Clicking the "Preview" button at the top of the report will bring up all pages of your reports, complete with outline data, page numbers, repeating elements, etc. To adjust any of the features, return to "Design" mode to make the appropriate corrections. Once the preview is just the way you like it, save and name your report for re-use before printing.

The options for reports are limited only by your personal needs and creativity. You may have several outlines appear in one report, all with different search criteria. Any text headers placed between outlines will automatically flow to the proper location as the outlines expand and contracts.

For example: to create a Weekly Progress Report for all direct reports, insert an outline for each person, with a text header over each outline. Continue to do so for all direct reports in the design section. In Preview mode, you will notice that the headers flow automatically to the end of the previous outline, without being overwritten.

Saving an Outline in .PDF format

To save an outline as a .PDF, select "PDF" from inside the Print dialog box. The application will automatically save your text to the destination of your choice in .PDF format.

Importing

ActionItems™ supports several kinds of import and export functions as listed below.

Importing from Address Book

ActionItems™ allows you to import contacts from your address book, either maintaining links, or importing data to act independently of address book record. For complete info on importing from address book, **see page 7.**

Importing Data

When you run *ActionItems*™ 2.5 for the first time, it will search your system to see if there is an existing version 2.0 data file. If one is found, you will be asked if you would like create a blank data file or import your 2.0 data.

Completing Action Items

As individual items are completed, clicking on the check box next to the item marks them as done. When the item is checked off, the due date will change to grey, indicating completion. *ActionItems*™ employs **Smart Checkbox** technology, so that checking off a parent item will also mark the children of that item as complete. Similarly, completing all of the children under an item will check off the parent as well. Checking off a SuperItem in one outline will check it off across all other outlines (to unlink a SuperItem so that this does not occur, highlight the item and go to Outline/Detach from Super Item).

Once an item is checked as completed, it will be hidden from your outline after a specified amount of time; the default setting is seven days. You can change the duration in the Preferences area under "Outline/Completed Items". Simply adjust the number inside the box to the desired interval.

Adding and Removing Checkboxes

If you wish to view an item in pure note form, as opposed to a checkable item, you may remove the checkbox by highlighting the item and selecting "Remove Checkbox" from the "Outline" menu. To add a checkbox to an item, highlight the item and select "Add Checkbox" from the "Outline" menu.

You may also choose whether newly created items start with or without checkboxes by using the Outline menu option (Show/Remove checkboxes), or by using the checkbox button at the right-hand bottom side.

Ready to Go!

Now that you are familiar with the many features of ActionItems 2.5 Notes-to-Action software, you are ready to begin! Please refer to the Help section inside the program for any help you may require, or e-mail techsupport@Sailalong.com for technical issues pertaining to the functioning of the software. You may also select "Provide ActionItems Feedback" from the ActionItems menu, which will bring you to Sailalong.com's feedback page.

We hope you enjoy the increased productivity and efficiency that ActionItems will bring to your everyday life!

Preferences

The **Preferences** window can be found under the *ActionItems™* menu, and allows you to make the following customizations:

General

Favorites: select number of favorites shown in favorites bar

Name Format: show names as first/last or last/first, sort by last or first

Date Format: select date display format from a variety of options, choose first day of week

Priority Format: alpha, numeric or combination

Journal: whether or not to allow checkboxes

Outlines

Spelling: enable or disable spell checking while you type

Outline Font: select font to be used for outline text

Column Font: select font to be used for text in the columns

Hot Keys: designate signifiers for standard item and super item, enable or disable "check for hot keys while you type".

Dragging: select assignment type when dragging an item (assigned as a standard item or a super item).

Completed Items: select number of days completed items are hidden from outlines, or disable. Select number of days completed items are archived, or disable.

Appearance: modify colors for pending items, assigned items, and completed items. Enable or disable alternating row background colors in all outlines.

Reports

Report Directory: select location for Reports Directory storage

Network

Receiving Items: elect to accept incoming items or not – must be selected to use in workgroup environment

Sending Items: elect to search the network for available users, adjust frequency in which items are re-sent

Updates adjust frequency application checks for updates on Sailalong.com web site, or "Check for updates now"

Glossary

Address Book Integration
Selecting "Import" from the "File" menu will bring up a list of contacts from your system address book. You can select one or more contacts and import them into *ActionItems*™.

Assigned Action Items Outline
Assigned Outlines are compilations of notes and items assigned to specific People or Projects. Use this view to keep track of your favorite people and projects.

Attachments (📎)
External documents and files can be linked to Assigned Outline items, keeping all pertinent documents stored in one place. To link a document to an item, click in the column with the paperclip heading. This pops-up a menu for opening, adding, or deleting linked documents. Or, drag and drop a file onto the attachments column inside the item.

File formats supported: MP3, PDF, TIFF, JPEG, GIF, BMP, PSD, PICT, PNT, EPS, PS, EPI, TARGA, RGB, SGI, PNG, MAC, FPIX, FAX, ICNS, ICO, and CUR files.

AutoSave
ActionItems™ will periodically save the contents of your data file according to the frequency selected inside your Preferences file. The program will also perform an automatic save upon closing.

AutoSend
The AutoSend feature instantly sends Live Assign items over the network to the intended recipient. If the recipient is not online at the time the item is sent, it will remain in your Pending until the recipient is online.

Backup to file
Creates a backup of your *ActionItems*™ data file in the location of your choice.

Calendar
The calendar appears along the left hand side of the Journal view. The typical display is a three-month view, which varies depending on the size of your program window. The calendar allows you to navigate to journal notes for one or more dates by clicking on the desired date(s).

Check for Updates
Accesses the Sailalong site for new version upgrades to the *ActionItems*™ program.

Child(ren)
An item that is indented below another item.

Created Date

The created date indicates when an item was either created or assigned.

Days Ahead
Items that have been given due dates will appear in Upcoming. Adjust the number inside the days ahead box to view items due within a specific time frame.

Directory
The Directory panel allows you to browse between People, Projects, Groups, Upcoming, Searches, Reports, and Inbox.

Drag and Drop
Drag and drop is a simple way to assign items to a person or project. It also allows you to attach external documents to an item inside an assigned outline. To perform a drag and drop, click on the item you wish to move, drag it to the desired location and then release.

Date Modified
"Date modified" updates each time a change is made to an assigned item. To view the date modified column inside Assigned Outlines, click on the arrow in the row across the top of the outline window and scroll to " Date Modified", which adds that column to the window.

Due Date
Indicates when a project or item is due for completion. Items that have assigned due dates will appear in Upcoming. To assign a due date, click in the due date column and select a date from the calendar. Items in either Pending or Assigned Outlines can be given due dates.

Favorites
Favorites appear across the top of the window just above the outline. They represent recently viewed people or projects. Along with the "Journal", you can choose to have your most frequently accessed projects or people remain in permanent view for easier access by dragging them between the two vertical lines next to the Journal display in the Favorites bar. To access options for favorites, go to the General Preferences menu.

Groups
Create custom groups to organize people and projects. A person or project can belong to more than one group.

Hot Keys
Hot Keys are a shorthand way of including a person or project in an item. When typing in an item, type the hot key character followed by the hot key and that item will automatically be sent to pending for the person or project.

> ***Example:*** For Joseph Ball, you may specify his hot key as "JB".

Hot Key Character
The hot key character is a signifying character used before the hot key when typing in an item. You can select the hot key character of your choice under Outlines in Preferences.

> **Note:** *The default hot key character for a standard item is *

The default hot key character for a super item is /

Hot Key Text
Hot Key Text is a text string designated by you to replace the hot key characters entered inside an item.

Example: You have a person names "Joseph Ball" with a Hot Key of "JB", and Hot Text of "Joseph Ball". The "\JB" you type inside an item to assign it to Joe will be replaced with "Joseph Ball".

You may disable this feature when setting up an individual person or project by leaving the field blank.

Import from Address Book
Imports selected contacts from your Address Book.

Inbox
The *ActionItems™* Inbox holds incoming action items sent to you by a co-worker on your local network. Once you "Live Assign" an item to another person, you will receive a message in your inbox indicating whether the recipient has accepted or rejected the assignment. You may also receive a notification when the item is complete.

Journal
The Journal is the primary place to record notes of all kinds. The Journal is the default view when opening *ActionItems™*. Use the Journal as a scratchpad to jot down notes and ideas that are not yet related to other people or projects, or to record meeting notes, lists, etc.

Listing
The Listing panel allows you to view all records for a selected Directory item.

Live Assign
Send action items to others on your local network who are running the program by clicking "Live Assign" when the item is highlighted in their Pending file. Recipients must be on the network in order to receive action items; items will stay in your Pending until the person is available.

Navigation Area
The Navigation area allows you to select a group, project or person, view Upcoming Items, perform searches, and access your Inbox.

Open in Address Book
Opens address book record for person highlighted in *ActionItems™*.

Origin
The Origin indicates where the item came from. The Origin can be a date, person or project. Clicking on the Origin will take you to the source item.

Parent
An item that has one or more items indented below it.

Pending

Pending is a place to review items before actually assigning them to a person or project. Pending items simply point to the source item in the Journal or Assigned outline and therefore cannot be modified or edited. However, you can assign priorities and due dates. If you need to modify the item, click on the Origin link.

People
Individual contacts to whom you can assign action items.

Preferences
There are many ways to customize *ActionItems™* for your usage. You can access Preferences under the "ActionItems" menu and select from General, Appearance, outlines, Data files, Network and Update. A complete description of each selection is contained in the "Preferences" section of this manual.

Priority Code (⚑)
Items in pending, upcoming items or assigned may all be given a priority code. The default codes are 1 – 5, with 1 being the most important. Priority code designations may be customized inside the Preferences window.

Projects
Create Project for your major activities and undertakings. Once your projects are set up, you can assign action items to it, and take notes directly in the specific outline. In creating the project you can give it a Hot Key designation, original due date and completion date, as well as notes about the purpose and mission of project.

Provide *ActionItems™* feedback
Brings you to Sailalong.com, where you can provide feedback and product-related issues to our technical development team.

QuickFind
Allows you to quickly access a text string inside any/all outlines as specified. You may also perform a search and replace from inside QuickFind.

Recently Viewed Favorites
Viewing assigned and pending outlines for a person or project, will create a "favorite" status for that person or project at the top of the window. To modify the number of recent favorites shown, adjust the number under "General" in the Preferences window.

Restore from file
Re-writes the existing *ActionItems™* data file with your previously established backup file.

Rich Text Format (RTF) Support
ActionItems™ supports bold, italic, underline, colors, system fonts and sizes. You can customize the text of an item by selecting a style from the "Format" menu.

Search
Create your own searches using a variety of criteria. All custom searches are automatically saved for re-use at a later date. You can also delete custom searches you don't wish to keep.

Smart Checkboxes

ActionItems™ uses Smart Checkbox technology. This allows you to check off a parent item, and the outline will check off all the children as well. If you check off a child and there are other items yet to be completed, the parent item will display a dash in the checkbox denoting a mixed state among the children. Once all children are checked off, the parent will automatically check as complete.

Special Characters

Brings up character palate with menu of symbols available for use.

Speech

The system can speak your outline to you! To hear the entire outline, highlight item(s) in the outline and select "Speech" under ActionItems > Services > Speech.

Spell Checking

You can spell check your entire outline by selecting "Spelling" under the "Edit" menu. Collapsed items will not be spell checked. You may also select "check spelling as you type", which will automatically underline unrecognizable words in red.

SuperItem

SuperItems are action items appearing in multiple outlines that are dynamically linked to each other. Changing the original item will automatically change all instances of the item. SuperItems are useful when assigning an item to more than one owner.

SuperItems are created by using a different Hot Key signifier as designated in the Preferences window. SuperItems are differentiated from a standard action item by a blue bullet point (versus grey for a standard item), and an italicized owner/project/due dates, which also appear in blue.

Upcoming

Upcoming keeps track of all due dates assigned to people, projects and tasks. Use it as a "to do" list for individual projects, or spanning across all projects and people in your file.

Reference

Keyboard Shortcuts menu

Insert Item	Return
Delete Item	Del
Indent	Tab
Outdent	Shift-Tab
Edit Item	Space Bar or Ctrl-Return
Stop Editing	Esc
Insert New Line	Shift Return
Move Between Items	Up/Down Arrow
Collapse Item	Click Left Arrow

Expand Item	Click Right Arrow

Using the Mouse

Edit Item	Click on Item Text
Stop Editing	Click Outside the Item Text
Drag Item	Click on Bullet or Arrow
Expand/Collapse Item	Click Arrow

Columns

Hide/Show Column
You can hide or show any column by clicking on the arrow at the right side of the column headings and selecting the column name.

Sort Column
Click on the column heading to sort in either ascending or descending order.

Move Column
To move a column, click on the column heading and drag it to the left or right to customize the order in which the columns are displayed.