An Action Management System

This document describes the requirements for ActionPeach, a multi-enterprise(?) action management system to be made available on the Web.

Action tracking systems allow the assignment of actions to a person, delegation and assignment of actions and tracking of due dates. Actions can also be used to manage a simple project, to manage a calendar as well as basic action tracking. With ActionPeach we somewhat generalize the notion of an action, so that this one application can be a calendar, an action system and a simple project management system.

(difference between simple or XX project)

Project has subprojects, subproject has subprojects

Think about an event such as a due date at a review meeting. This date can be, at once, an engagement—it’s a meeting, and it’s also a due date for an action—there’s a delivery to be described. Clearly in this generalized approach, some attributes that might be single-valued for a single-purpose application may need to be multi-valued.

Special case, meeting can be single-user, or multi users

Email systems: to single user, multi users, all ,team

Create task , meeting (choose users who invite, send emails) advanced version for add task page.

# Concept of Operation

## Enrollment

First, an enterprise must enroll in the use of the application. Someone who is authorized to act for the enterprise establishes an account, and becomes the administrator for the account. (page to change password) This administrator establishes accounts and temporary passwords for other users. The administrator can establish other administrator accounts as well as other types of users. The administrator establishes project accounts and designates project administrators, at least one for each. An administrator can also be a project administrator. Projects have their own hierarchy of people as well as a hierarchy of subprojects.

(Administers, PM, normal users)

There will be at least two classes of users other than administrators: users who can delegate and those who cannot delegate. A delegator can assign responsibility for an action to someone else. The names of the people to whom a delegator can assign can be listed, or the delegator can have authority to delegate to anyone else in the enterprise. A non-delegator can act on actions and can perform some updates but cannot delegate them.

Admin can delegate actions to suitable persons.

Different can have different roles.

How many tasks a user has

It may be necessary to have other classes of users as well.

There will also be another class of user, who logs on personally just for herself. This person does not have to give an enterprise name, and this person’s actions will be visible only to herself.

An individual who establishes an account as an individual can later join an enterprise, and ActionPeach will allow either the conversion of an individual account to an enterprise account or the merging of the actions in an individual account into an enterprise account.

Note that userids are not required to be unique across all ActionPeach accounts. That is, a private user, with no enterprise identified, can have the same userid as an enterprise user, and an enterprise user at one enterprise can have the same userid as a user at another enterprise.

## Action

An action has at least these attributes:

* Identifier—generated unique identifier
* Description—description of the action to be carried out
* Risk—level of risk
  + If there is a level of risk, then enterprise must provide a table of risk levels, or use the standard one
* Status (computed auto)
  + Enterprise must use default list or provide a custom list
* Urgency
  + Default or custom list
* Project—name of the project the action is part of
  + Subproject—name of part of project
  + Every project has a hierarchy of subprojects that can be established
  + Subprojects are managed by a project administrator, one per project
* Status - log
  + Comment on current status, with date
  + All past statuses are kept, display is optional
* Owner--Identity of the creator
  + May be created for an owner by a proxy
  + Every enrollee can specify proxies who can carry out all of that enrollee’s privileges
* Responsible actor—identify of person responsible for completing the action
* Created date—date when action was created
* Completion date
  + date when action is planned to be completed
  + date when action is expected to be completed
    - may be multiples
    - each of multiple has associated time
  + actual completion date—when action was closed

## Delegation

An action can be delegated to another person. That person can delegate it as well. An action can be delegated to a person lower in the delegation hierarchy without feedback from that person. To delegate to a person at the same level or above in the delegation hierarchy, the delegatee must accept the delegation before it is final.

Accept or not? Message box?

## Type of Action

We will have something not common for action item systems: action type. The type can be used to determine which attributes are active for an action.

For example, a type of “Calendar entry” is used for something that’s just a calendar item and not really a work assignment of any kind. If the entry is this type, then it would not have all the attributes of a generalized action. It might have these attributes:

* Identifier
* Description
* Completion Date
* Duration
* Location

We will establish a list of action types. Each will have its attributes listed in a table that we establish. The data model is to support the definition of additional action types.

The initial set of action types will be action and calendar entry.

## Organizations

This will be offered on the Web for any organization wanting to use it. To use it, someone creates an account with userid and password, and takes the role administrator. That person has the right to administer the organization’s account, which includes the following:

* Establishing user accounts
* Establishing type lists for attributes where this can be chosen
* Establishing attribute lists for changeable attributes
* Entering the organization table for users

Users can be organized into a hierarchy for purposes of delegation and review. This can be viewed as a hierarchy of supervisors. Everyone in the hierarchy can see all the information in all actions assigned to her and to all persons below her in the hierarchy. She can also make changes in assignments for all actions that the person is allowed to see, except for her own actions. When a change is made, the responsible individual is notified of the change and can accept or reject the change. If the responsible individual rejects the change, an explanation is required. The supervisor can then revoke the change or override the objection.

Message box or emails?

Select box

The enterprise administrator has other capabilities as described or inferred elsewhere in this document.

## Reporting

### Actions

Actions can be reported a number of different ways. There is no distinction between screens that are printed and actions that are intended for the use of a single person. A user can work with the UI to determine the visual results that are desired and then print it. Or the user can use the UI to display information that’s of interest.

Actions can be reported by project and subprojects.

List of actions can be produced, with various filters. Filters can be by date range, organization, owner, assignee, and any combination of attributes.

Choose all of them

Actions that are calendar items can be used to produce a calendar. A calendar can include only calendar type entries or it can also include action items, showing them as well as calendar items on a calendar. There are various forms of calendars.

Over time a body of data will be formed. It will be possible to analyze this body of data; for example, by person, on the average how late were actions completed? By person, what percentage of actions were delegated? And other relevant analysis. For example, by organization (within an enterprise) what was the average completion delay for an action? …and other relevant items to report and analyze.

## Data Sharing

ActionPeach can share data with Google Calendar by loading data from Google Calendar into ActionPeach actions. In addition, ActionPeach can load actions into Google Calendar. When ActionPeach is transferring data to Google Calendar, first the set of actions to be exported is specified and then it is transferred.

Standard Project

ActionPeach offers its users a unique capability. This is particularly useful for someone or an organization that does a certain activity repetitively. For example, they might have a standard set of tasks that are part of every project plan. Such an organization can create a set of tasks that has its own name. Any enterprise member can create a set of tasks just like the prototype set, with the same names, once that person supplies a project name for it.

A consultant can use this capability to set up a standard set of tasks to be handled for each new engagement, so be sure that all the startup issues are covered. Or an organization with a standard approach to project management could use it to set up a new project with all of the required tasks.