

# Zoomi > Help Page

vendredi 15 janvier 2016

15:14

## Set-up before starting

Once your account is created, [go to the Profile Page](#) to:

- 1) Set your first name and last name (so people show your name in transfer section)
- 2) Give a name at your company/organization (so in future release, you will see by default your structure)

Optionnaly, but recommended, [go to Themes page](#) to

- Create categories of actions. You can also see them as sub-Business or Problems
  - o This will allow you to categorize and better visualize your items (done or to be done)

## Your first actions

Finally that to list your first actions by using the form at the bottom of the page or behind the top right the page on a mobile device.

What do you need to do today?	Theme	Due date?
<input type="text"/>	<input type="text" value="-----"/> ▼	<input type="text" value="YYYY-MM-DD"/>

- o Theme and Due Date are optional
- o Due date should be entered YYYY-MM-DD like 2016-02-15

## Main actions on this list

- o To make an action done, simply click the checkbox

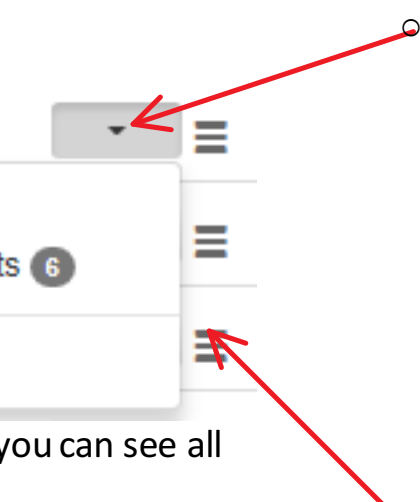
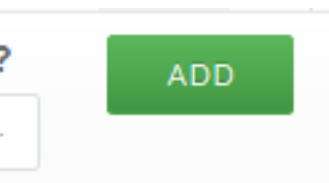
<input checked="" type="checkbox"/>	Workflow > Problème Compliance - Email	
<input checked="" type="checkbox"/>	CR > Comité tech reversement	<div>Edit Comment Switch</div>
<input checked="" type="checkbox"/>	Activer les users Pending Arval	

- o On each action, if a Theme is defined, it appears clickable. When you click on it you see the actions of that theme (done or not)

t only people in

one)

the '+' icon on



Clicking on the menu of each item allow you to

- Edit that entry
- See and add comments (badge indicate number of comments)
- Switch some information (today number of days since creation of this entry)

## Working with Sections

When you create an entry you can define it as a Section. You can use section [to categorize y using the Eisenhower matrix, ABC](#) or [Agile Kanban boards](#) like the ones I use today (see screen

- Blocked
- In progress
- Recurrent
- Planned
  - o the future I am planning to start
- Backlog

I personally like this approach and its order (top - down) because it forces you to stop start finishing.

- Objective n°1 should be to close your blocked items
- Objective n°2 is then to do your in-progress items and stay focused on them until it's o blocked

## Working with Transfer module

Another aspect of Zoomi is the capability to transfer items.

Tick that box and your entry disappears from your Home page and is now accessible in the Tra section.

If in addition to ticking that box, you select one or more assignees, this entry is automatically top of the home of these assignees and highlighted in green.

**ZOOMI**

HOME

TRANSFERRED

THEMES

PROFILE

?

This is your list of open items ☐ including personal ones

✓	Immoveom > mettre sur dropbox IMMO15	
✓	Habillez-moi > preparer defile de mode pour le salon des seniors avec ...	
✓	mettre MOKA sur dropbox	
Blocked		
✓	Workflow > Problème Compliance - Email	

- creation of this entry;
- Use the 3 horizontal lines to move item up or down

[our actions](#)

enshot)

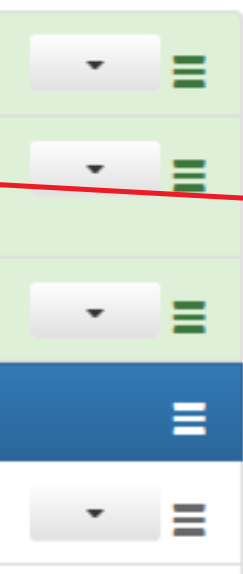
ing and start

done or ...

nsferred

y visible at the

LOGOUT



- These items has been assigned to me and not yet moved to a section

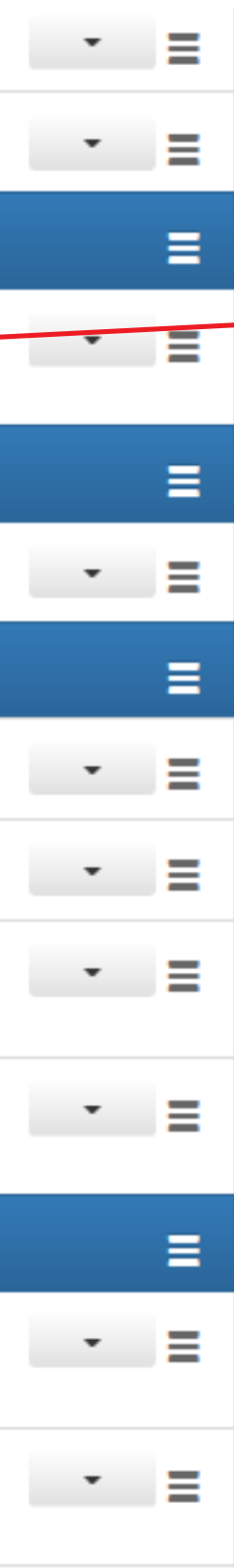
✓	CR > Comité tech reversement	
✓	Activer les users Pending Arval	
In progress		
✓	Ma carrière > Slides sur Agile pour Money Bank	Jan. 14, 2016 ←
Recurrent		
✓	Metrics > Contrôle de saisie des temps	Jan. 18, 2016
Planned		
✓	CR > TG5 Digitall	
✓	Ma carrière > Formation Rally Scrum	
✓	Sciforma > Rapport par défaut = 4.2 Ma capacité des prochains mois	
✓	Ma carrière > Forum Six Sigma sur la systémique	Feb. 20, 2016
Backlog		
✓	Sciforma > Revoir la qualité des projets dans Sciforma	Jan. 14, 2016
✓	Ma carrière > Formation Q1 de PM Excellence	Feb. 1, 2016

What do you need to do today?

Theme

Due date?

## FAQs



~~○~~ Due date is over

ADD

- I marked an action done too fast, can I undo it?
  - The list of actions made done will be soon visible in a dashboard page. In the m action was linked to a theme, go to that theme to show this action done and tick black checkmark
- Where are stored my data?
  - We use Heroku which is a Platform As A Service, hsoted itself in Amazon Cloud i
- Do you have a CNIL Declaration?
  - That's under progress
- Do you have terms and conditions?
  - That's under progress

meantime, if this  
k again the

n Europe.