

ACM Web Toolkit
Action Items
Usage Guide

by Matthew Cleveland
May 20, 2009

Introduction

The Action Items toolkit allows members of your body to manage existing tasks, view previous tasks, and create new tasks. It is an efficient way to get an overview of the pending and completed activities of the members of your body. This toolkit has been used for several years by the History Committee to track action items. To access this toolkit, click the designated Action Items link. This will take you to the default view, as discussed in the following section.

This guide outlines Action Items toolkit usage. In particular, it demonstrates toolkit navigation, how to add new Action Items, how to update existing Action Items, and how to finish and reassign existing Action Items. (Note that only users with administrative credentials have access to the Action Items functionality.)

Setup

In order to activate the ACM Web Toolkit for a body, one of the volunteers of your body should simply email the webmaster (history-webmaster@acm.org) with your request. In their response, the webmaster will request a body name, which will be used to uniquely identify your organization. After some initial server setup, you will then be provided with a URL, linking to your internal site. This URL will be embedded in your own site (note the site is designed to make use of CSS files, if desired), dynamically populating it with the appropriate content, which will be stored in the central ACM History database. The pages in which you embed the provided links should be formatted using a specified layout in order to take full advantage of the functions, such as the top links, provided by the toolkit (this layout is described on the ACM History committee website).

Once activated, the webmaster will contact your organization's liaison and then you are ready to start populating your site! In order to use the Action Items toolkit, you must add user information to the database. This can be done using the ACM Composition toolkit. Please refer to the ACM Composition toolkit manual for further instructions on this procedure.

Default View

After clicking the designated Action Items link, the user is taken to the default Action Items page. This page lists all current action items, grouped by the person to whom they are assigned, and sorted alphabetically by last name. The links at the top of the page allow the user to quickly skip to a specific person's action items.

Each action item has functions allowing modification or further details of the associated action item. By clicking on the action item title (in blue), the user is taken to the section of the meeting minutes where the action item originates, if one has been designated.

The screenshot displays the 'ACM History Committee: Action Items' page. On the left is a navigation menu with items like 'Internal Home', 'Announcement Archive', 'Toolkit Administration', 'Toolkit Configuration', 'Composition', 'Action Items' (highlighted), 'Interviews', 'Annual Approved Budgets', 'Listserv Archive', 'Private Meeting Minutes', 'Projects In Progress', and 'Website Administration'. The main content area has a header 'ACM History Committee: Action Items' and sub-headers 'View Current List | View Completed List | Add Item'. Below this is a list of names: 'Aspray, William (10) | Cleveland, Matthew (5) | Halpern, Brent (8) | Hall, Mary (14) | Hutchins, Carol (16) | Ryan, Patricia (1) | Shustek, Len (1) | Snodgrass, Richard (10) | Wise, David (8)'. The 'Current Action Items' section is for 'William Aspray (10 Open, 1 Completed) Back To Top'. It lists five items:

- 257. [Revise paragraph](#)
Buttons: Add Update, Mark Complete, Reassign
Details: Bill will revise the paragraph starting "Bill discussed SIAM..."
Date: March 8th, 2004
Updates: No updates
- 263. [Send interview list](#)
Buttons: Add Update, Mark Complete, Reassign
Details: Bill, Tom, and Mike will send a list of those interviews they know about.
Date: March 8th, 2004
Updates: No updates
- 280. [Send interview list](#)
Buttons: Add Update, Mark Complete, Reassign
Details: Bill, Tom, and Mike will send a list of those interviews they know about.
Date: March 8th, 2004
Updates: No updates
- 220. [Rick's straw-man proposal](#)
Buttons: Add Update, Mark Complete, Reassign
Details: Bill will share Rick's straw-man proposal with Henry and invite him to participate in the next CC.
Date: March 21st, 2005
Updates: No updates
- 214. [IEEE Annals Events and Sightings](#)
Buttons: Add Update, Mark Complete, Reassign
Details: Mike will prepare a series of short items for the IEEE Annals Events and Sightings. Mike will do this as the Committee produces deliverables.
Date: April 18th, 2005
Updates:

Each action item has functions allowing modification or further details of the associated action item. By clicking on the action item title (in blue), the user is taken to the section of the meeting minutes where the action item originates.

Add Action Item

To add a new Action Item, click the Add Item link at the top of the page. The Add Item page asks the user to specify to whom the action will be assigned, when the action was created, a title for the Action Item, and the text of the Action Item. The Associated with Minute radio button allows the Action Item to link to a document on the Meeting Minutes section of the site. If there are no minutes associated with this Action Item, specify No , otherwise choose Yes and enter the URL of the meeting minutes in the corresponding text box.

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- Internal Home
- Announcement Archive
- Toolkit Administration
- Toolkit Configuration
- Composition
- Action Items**
- Interviews
- Annual Approved Budgets
- Listserv Archive
- Private Meeting Minutes
- Projects In Progress
- Website Administration

ACM History Committee: Action Items

[View Current List](#) | [View Completed List](#) | [Add Item](#)

Add An Action Item

Select A User: --Select A User--

Date Started: MM DD YYYY

Associate with Minutes: Yes No

Minutes URL:

Title:

Description:

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Add Update

Click the Add Update button to append an update to the existing action item. At the Update Item page, simply input the text of the update and click Submit. The new text will be appended, in list form, to the existing action item.



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[View Current List](#) | [View Completed List](#) | [Add Item](#)

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Update Item:

- Track projects in database*
 - Track: projects in database, with two summary pages; projects in progress and projects completed.
 - Date: March 3rd, 2007
 - Updates:
 - August 25th, 2008: Reassigned to Matthew Cleveland from Jesse Tadlock.
 - January 9th, 2008: Put on hold right now. I will hopefully work on this when the Council Archive is done.

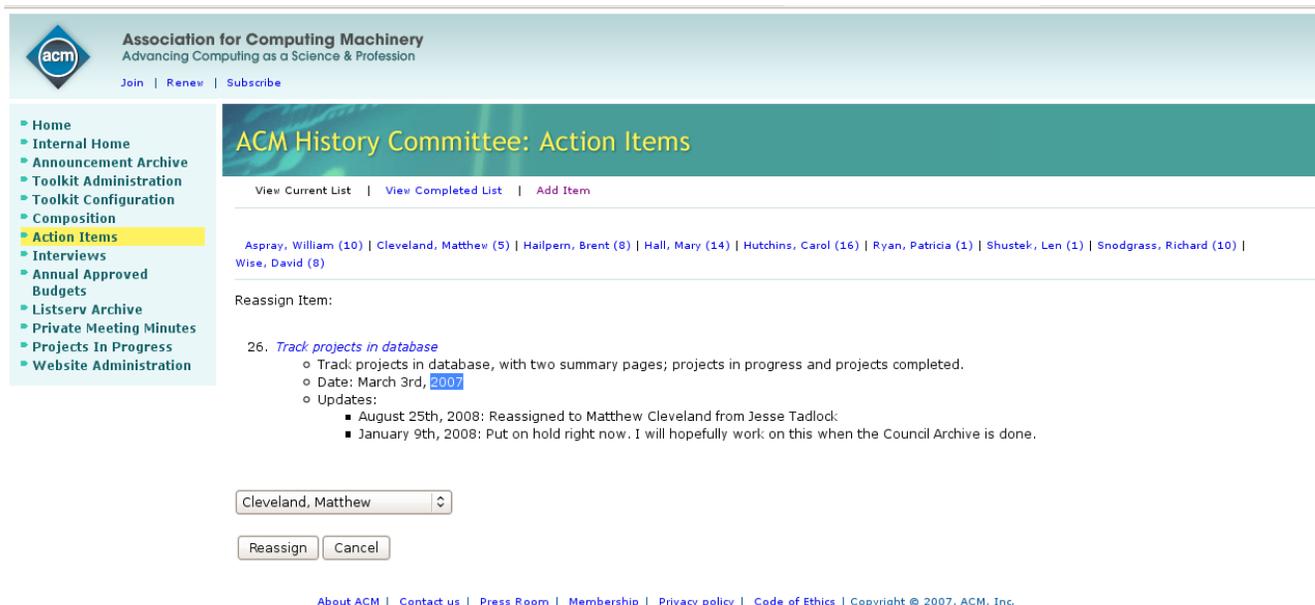
Description: May 21st, 2009:

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Reassign

The Reassign button allows the user to change ownership of the specified current action to another user in the system. After the operation has been completed, the action item will no longer be listed in the original owner's item group, but in the item group of the person to whom it was assigned.

To complete this action, click the Reassign button associated with the desired action item. At the Reassign Item page, select a person to whom the action will be reassigned and click Reassign. The item has been successfully reassigned to the designated person.



The screenshot shows the ACM History Committee: Action Items page. The header includes the ACM logo and the text "Association for Computing Machinery Advancing Computing as a Science & Profession" with links for "Join", "Renew", and "Subscribe". A left sidebar lists navigation options such as "Home", "Internal Home", "Announcement Archive", "Toolkit Administration", "Toolkit Configuration", "Composition", "Action Items" (highlighted), "Interviews", "Annual Approved Budgets", "Listserv Archive", "Private Meeting Minutes", "Projects In Progress", and "Website Administration". The main content area is titled "ACM History Committee: Action Items" and includes links for "View Current List", "View Completed List", and "Add Item". Below this, a list of names is shown: "Aspray, William (10) | Cleveland, Matthew (5) | Hailpern, Brent (8) | Hall, Mary (14) | Hutchins, Carol (16) | Ryan, Patricia (1) | Shustek, Len (1) | Snodgrass, Richard (10) | Wise, David (8)". The "Reassign Item:" section displays item 26, "Track projects in database", with details: "Tracked projects in database, with two summary pages; projects in progress and projects completed.", "Date: March 3rd, 2007", and "Updates:" which includes "August 25th, 2008: Reassigned to Matthew Cleveland from Jesse Tadlock" and "January 9th, 2008: Put on hold right now. I will hopefully work on this when the Council Archive is done." Below the item details is a dropdown menu currently showing "Cleveland, Matthew" and two buttons: "Reassign" and "Cancel". The footer contains links for "About ACM", "Contact us", "Press Room", "Membership", "Privacy policy", "Code of Ethics", and "Copyright © 2007, ACM, Inc."

Mark Complete

By clicking the Mark Complete button, the user indicates that the action required by the action item has been completed. This action item will no longer show up on the default current action items page, but can be accessed by the View Completed List at the top of the page. On the resulting page, the user may specify a comment to append to action item to append to the default completion comment. Click Submit to finalize the completion process.



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ACM History Committee: Action Items

[View Current List](#) | [View Completed List](#) | [Add Item](#)

[Aspray, William \(10\)](#) | [Cleveland, Matthew \(5\)](#) | [Hailpern, Brent \(8\)](#) | [Hall, Mary \(14\)](#) | [Hutchins, Carol \(16\)](#) | [Ryan, Patricia \(1\)](#) | [Shustek, Len \(1\)](#) | [Snodgrass, Richard \(10\)](#) | [Wise, David \(8\)](#)

Complete Item:

26. *Track projects in database*

- o Trad: projects in database, with two summary pages; projects in progress and projects completed.
- o Date: March 3rd, 2007
- o Updates:
 - August 25th, 2008: Reassigned to Matthew Cleveland from Jesse Tadlock.
 - January 9th, 2008: Put on hold right now. I will hopefully work on this when the Council Archive is done.

Completion Comment: Completed May 21st, 2009:

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Viewing Completed Items

To view past items which have been finished, click the View Completed List link at the top of the page. Here you will see all Action Items that are no longer current. If an Action Item has been marked completed but should be reactivated, simply click the Reopen link next to the appropriate Action Item listing. The Action Item will no longer appear on the completed list, but will be listed with current Action Items.



The screenshot shows a web page titled "ACM History Committee: Action Items". On the left is a navigation menu with items like "Internal Home", "Announcement Archive", "Toolkit Administration", "Toolkit Configuration", "Composition", "Action Items" (highlighted), "Interviews", "Annual Approved Budgets", "Listserv Archive", "Private Meeting Minutes", "Projects In Progress", and "Website Administration". The main content area has a header "ACM History Committee: Action Items" and links for "View Current List", "View Completed List", and "Add Item". Below this is a list of names and counts: "Aspray, William (1) Chang, Monique (2) Cleveland, Matthew (7) Haigh, Thomas (12) Hailpern, Brent (6) Hall, Mary (30) Hutchins, Carol (11) Johnson, Mark (3) Kaplan, Elisabeth (4) Mahoney, Michael (12) McGuinness, Rosemary (5) Misa, Tom (2) November, Joseph (4) Ryan, Patricia (15) Shustek, Len (6) Snodgrass, Richard (82) Tadlock, Jesse (6) Wise, David (68)".

Completed Action Items

William Aspray (10 Open, 1 Completed) [Back To Top](#)

- 89. [Suggest Historians For Interviews](#) [Reopen]
 - o Mike and Bill will suggest historians to consider for the Backus, Wirth, Hopcroft, Scott, and Rabin oral histories, to be asked once financing is in place.
 - o Date: January 27th, 2006
 - o Updates:
 - Completed December 26th, 2007:
 - December 26th, 2007: probably time to give up on Tom Drucker. Not a historian, but Juris Hartmanis has an interest in history and might be good for the interviews on Hopcroft, Rabin, and Scott. Possibly Gerard Alberts on Wirth.

Monique Chang (0 Open, 2 Completed) [Back To Top](#)

- 202. [ACM History Committee to be noted on EC web site](#) [Reopen]
 - o Monique will have the EC web site amended to indicate this "Committee on ACM History" (no "Presidential Ad Hoc") is a "Committee of The Executive Committee", joining the other two such committees, the "Coalition to Diversity Computing" and the "Committee on Women in Computing". She will also amend the History Committee's web site History Committee's web site appropriately.
 - o Date: March 8th, 2004
 - o Updates:
 - Completed May 30th, 2008: Done years ago!
 - May 30th, 2008: Done years ago!
- 226. [Invite contractee to meeting](#) [Reopen]
 - o Monique will invite this person to our meeting and add to the email list.
 - o Date: January 26th, 2005
 - o Updates:
 - Completed May 30th, 2008: Done years ago!

Matthew Cleveland (5 Open, 7 Completed) [Back To Top](#)

- 27. [Track committee members in database](#) [Reopen]
 - o Track: committee members in database, with a summary page listing current members.
 - o Date: March 3rd, 2007
 - o Updates:
 - Completed November 13th, 2008:
 - January 9th, 2008: I need to tweak this still. I will finish this soon.
 - May 22nd, 2007: I have added everyone to the database, I just need any missing information to be given to me.
- 28. [Turn SIC page into two pages](#) [Reopen]