Power.ME

iPhone User Guide

Thank you for choosing Power.ME for your life management tool. The following sections explain how to use the various options and features you now have at your fingertips.

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General Information

Power.ME Toolbar

The Power.ME Toolbar is the black bar that appears on the lower edge of your device's screen. The Toolbar is available from almost all the pages within the app and allows you to return to the Home Menu, search your Power.ME content, change your settings, access help with Power.ME, and quickly add tasks and other items.

Actions Button

Many pages have an Actions icon in one of the top corners of the screen (it looks like a rectangle with an arrow breaking out of it). Tapping on it reveals additional actions, such as printing or expanding. Options vary depending on the page being viewed.

Home Menu

From the Home Menu you can easily navigate to your essential Power.ME functions and lists. When you first use Power.ME, the options will appear in the following order: Documents, Inbox, Tasks, Task Filter, Projects, Team Room, Due Date, Priority, Completed, and Trash.

- If you want to change the default order, tap *Edit* in the top right corner of the Home Menu screen.
- Place your finger on the three-lined icon that appears on the right-hand side of the menu items' cells. This lets you "grab" them.
- Drag the item up or down into the position you want. Continue re-

ordering items until you have your ideal order.

- Tap *Done* in the upper right corner of the screen.

Documents

Your Document List will show all of your documents and media files (be they Power.ME notes and drawings or files uploaded from other programs). Documents are organized alphabetically and divided according to the project or folder in which they are stored. (See the Media Files portion of the user guide for more information.)

- If you want to change the order of the documents in your Document List, tap the *Actions* icon in the upper right corner of the screen.
- Tap *Re-Order* on the menu that appears.
- Place your finger on the three-lined icon that appears on the right-hand side of the documents' cells. This lets you "grab" them.
- Drag the document up or down into the position your want. Continue re-ordering items until you have your ideal order.
- Tap *Done* in the upper right corner of the screen.

Inbox

Your Inbox is where all tasks, projects, and folders that other users assign to you go. It is also where new tasks you create go if you don't organize them into projects and folders. From the inbox you can view these items and organize them into your existing projects and folders. (See the Inbox, Team Room, & Trash portion of the user guide for more information.)

Tasks

Your Task List displays all your uncompleted tasks (if you change your settings, it will also display completed tasks). Tasks are organized alphabetically and divided according to the project or folder in which they are stored. (See the Tasks portion of the user guide for more information.)

- If you want to change the order of the tasks in your Task List, tap the *Actions* icon in the upper right corner of the screen.
- Tap *Re-Order* on the menu that appears.
- Place your finger on the three-lined icon that appears on the right-hand side of the tasks' cells. This lets you "grab" them.
- Drag the task up or down into the position your want. Continue re-ordering tasks until you have your ideal order.
- Tap *Done* in the upper right corner of the screen.

Projects

Your Project List displays all your projects and folders. Projects and folders are organized alphabetically. To view the contents within a project or folder, tap on its cell. If instead you want to view the project or folder's details (due date, start date, assignments, etc.), tap on the project/folder icon. (See the Projects portion of the user guide for more information.)

Task Filters

Your Filter List displays all your filters organized alphabetically. From the Filter List you can tap on a specific filter and view all the tasks to which that filter is attached. (See the Filters portion of the user guide for more information.)

Team Room

Your Team Room displays all content that others have shared with you and that you have shared with others using Power.ME Sync & Share. Content is divided into items that have been assigned to you and items you have assigned to others. The items you have shared are further divided according to who you shared them with. (See the Inbox, Team

Room, & Trash portion of the user guide to learn more about navigating the Team Room. See the Tasks, Projects, or Media Files portions of the user guide for more information about sharing and assigning.)

Due Date

The Due Date List displays all tasks and projects that have assigned due dates. Items are organized according to the due date, with closer due dates appearing first. Overdue items' due dates will appear in red. (See the Tasks or the Projects portion of the user guide for more detailed instructions on setting due dates.)

Priority

Your Priority List displays all the tasks that have a set priority (low, medium, high, or urgent), with the higher priority items appearing higher on the list. You can edit the priority of a task by editing the Task Details. (See the Tasks portion of the user guide for more detailed instructions on setting priority.)

Completed

Your Completed List displays all your tasks and projects that have a Complete status. (Both the Tasks and Projects portions of the user guide have more information on setting an item's status.)

Trash

Your Trash displays all the items you have deleted. From the Trash you can restore or destroy individual trashed items or you can empty the trash to permanently destroy all the trashed items. (See the Inbox, Team Room, & Trash portion of the user guide for more information.)

Inbox, Team Room, & Trash

Receiving and Organizing Items from the Inbox

The inbox is where you find all your new, unorganized tasks as well as any items that that others have shared with you.

- To move an item out of the Inbox, there first needs to be somewhere for it to go. If you don’t have a project or folder in which it would appropriately fit, take the time now to create one. (See the “Projects” portion of the user guide for more information on creating a project or folder.)
- Tap the cell of an unorganized task/project/folder to open the Details window.
- Tap the *Project* field from the details options. (The icon with the brightly colored binders is a part of the Project field.)
- A list that displays your projects and folders will appear. Select the project or folder you want to organize the new item into by tapping on the empty circle next the project/folder. The circle should turn red and show a checkmark. If you want to select a project or folder that is inside one of your root projects or folders, tap the root folder and you’ll be able to view its contents. (If you want to move out of the sub-projects and folders, tap the button in the upper left corner of the screen.)
- Tap *Done* in the upper right corner of the Projects/Folders display panel. You can then either continue editing the item’s details or tap *Done* in the upper right corner of the screen.

Navigating the Team Room

Your Team Room displays all content that others have shared with you and that you have shared with others using Power.ME Sync & Share. Content is divided into items that have been assigned to you and items you have assigned to others. The items you have shared are further divided according to who you shared them with. You can navigate and edit Team Room content the same way you navigate and edit unshared content: Tap project and folder cells to see the content inside; tap project and folder icons to view their details; tap task cells to see their details; tap document cells to view the documents; tap document icons to view their details; etc. However, there are a few differences.

- You cannot mark a task someone else created and assigned to you as completed. When you feel you have completed the task, tap the empty icon next to the task until a white checkmark appears in the box. This checkmark indicates that the task is ready for review. (To learn more about the task review process, see the "Tasks" portion of the user guide.)
- You cannot edit the details of an item another user created except to organize it within your projects and folders. However, you can add comments to an item by opening the item's details window (for projects/folders, tap their icon; for tasks, tap their cell; for documents, tap either the icon or the cell). (To learn more about commenting on shared content, see the Tasks, Projects, or Media Files portions of the user guide.)

Restoring Items from the Trash

Items you have deleted are not immediately destroyed. They are stored in your Trash until you specifically destroy them or empty the Trash. Up until that point, all your deleted tasks, projects, folders, and documents can be restored.

- Tap on *Trash* from the Home Menu.
- Tap on the item you want to restore (it doesn't matter if you tap the icon or the cell; both do the same thing).

- Tap *Restore* in the window that appears.

If you restore a project that has items assigned to it, the project and its items will be restored. If you restore a task, but not the project or folder it was originally assigned to, the task will be restored but it will no longer be assigned to that project. This is true even if later on you restore the task's parent project.

Destroying Items in the Trash

- If you want an item in your Trash to be deleted forever, tap *Trash* on the Home Menu.
- Tap the item you want to destroy (it doesn't matter if you tap the icon or the cell; both do the same thing).
- Tap *Destroy* in the window that appears. After you do, the item will be permanently destroyed and irretrievable.

Emptying the Trash

- If you want all the items in your Trash to be deleted forever, tap *Trash* on the Home Menu.
- Tap the *Empty Trash* button in the upper right corner of the screen.
- Confirm your choice by tapping *Yes*. After you do, the items will be permanently destroyed and irretrievable.

Tasks

Adding a Task

- Tap the *Task* button on the Power.ME Toolbar* running along the bottom of your screen (you can also tap the *Add* button and select *Task* from the list of options).
- Enter any details about the task on the Task Details page that appears. Only the task's name is required information, but there are all sorts of options you can customize to help you better organize your tasks. See the task options below to learn more.
- Once you've included all the information you want, tap the *Done* button on the upper right corner of the screen. (If your keyboard is still up, the button that minimizes your keyboard will be in the upper right corner. Once you tap it and remove the keyboard, the *Done* button will appear.)

*Once you've set up a project or two, you can add tasks from inside a project or folder by tapping the empty space at the bottom of the screen where it says, "Tap here to add a new task." Type the task name into the empty field and tap Return on your keyboard. Once the task has been created, you can edit its details by tapping on its cell to open the Task Details page. When you've set up some filters, you can add tasks from inside a filter the same way you add them from inside a project or folder.

Deleting a Task

There are a few ways of removing a task from your task list:

- Swipe your finger along the task's cell. A red *Delete* button will appear in the cell. Tap it and your task will be deleted.*
- Tap on the task's cell, then tap the trash bin icon in the upper left corner of the Task Details page.*
- Mark the task as completed (see "Changing a Task's Status" below). If you don't want completed tasks to be removed from your Task List, you'll have to change the default settings (see "Viewing Completed Tasks in Your Tasks List").

*Deleted items are stored in your Trash until you destroy them or empty the Trash. Should you need to restore a task, go to the Trash, tap the task you want to restore, and select *Restore* from the options that appear.

Organizing a Task into a Project/Folder

Organize your tasks into projects and folders so you can make sure you're getting everything done.

- Either add a new task or tap an existing one to open the Task Details page.
- Tap on the *Project* field—this will allow you to choose either a project or a folder for the task. (Scroll down if the field doesn't appear on your screen.)
- A list that displays your projects and folders will appear. Select the project you want to organize the task into. (If you later decide to make remove the task from the project, select *None*.) To select a project or folder, tap the circle icon next to it. If you want to select a project or folder that is inside one of your root projects or folders, tap the root folder and you'll be able to view its contents.
- When you have selected the project you want, tap *Done* (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

NOTE: If after putting a task into a project or folder you want to remove it from that project/folder, simply tap the *Project* field of the Task Details page and select *None*.

Attaching a Filter to a Task

You can use filters to organize tasks by the place or person needed to get the task done. For example, tasks with a "Boss" filter could be tasks you need to do with your boss; "Computer" tasks could be those you need your desktop or laptop to complete.

- To assign a filter to a task, add a new task or tap an existing task to open the Task Details page.
- Tap the *Task Filter* field (scroll down if it doesn't appear on your screen).
- Tap all the filters you wish to attach to the task. (Multiple filters can be applied.) When a filter is attached, a checkmark will appear to the right of the filter name.
- When you have made your selections, tap the *Done* button (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

Removing a Filter from a Task

- To remove a filter from a task, tap the task to open the Task Details page.
- Tap the *Task Filter* field (scroll down it if doesn't appear on your screen).
- Tap all the filters you wish to remove from the task. When a filter is removed, the checkmark next to its name will disappear.
- When you have removed the filters you wanted to remove, tap the *Done* button (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

Changing a Task's Status

A task's status refers to where it is in terms of completion. Depending on your settings, possible statuses are *None, Assigned, Accepted, Declined,* *In Progress, On Hold, Canceled, Ready for Review*, and *Complete*. Most of these options are for letting your team members know about where the task is going. You can change a task's status from the Task Details window or from any list that contains the task, but the options available are a little different for each method.

From Task Details

- To change the status of a task, add a new task or tap an existing one to open the Task Details page.
- Tap the *Status* field (scroll down if it doesn't appear on your screen).
- Tap the status you want to assign to the task. You can set the status to be any of the available options.
- Either continue editing task details or tap *Done* (in the upper right corner of the screen).

From a List

- Tap the empty square icon next to the task. If you are using the default settings*, this will change the task's status from *None* to *Complete* if it's a task you created. If someone else created the task and assigned it to you, it will change the task's status from *Assigned* to *Ready for Review*. (See "Reviewing a Task" below to learn more.)

*You can change this setting by tapping on the Settings button of the Power.ME Toolbar and scrolling down to the *Show Tasks as In Progress* field. If you change the selection from *Off* to *On*, tapping on a task's icon once will change its status to In Progress. Tapping it a second time will change it to Complete or Ready for Review.

Setting a Task's Priority Level

Priority levels provide another way for you to organize your tasks and keep yourself on track.

- To set a task's priority level, add a new task or tap an existing one to open the Task Details page.

- In the Priority field (scroll down if it doesn't appear on your screen) are a series of options: *None, Low, Med[ium], High,* and *Urgent*. Tap the appropriate priority level for the task. The task's cell background color will change according to its priority level (low = gray, medium = green, high = yellow, urgent = red).
- Either continue editing task details or tap *Done* (in the upper right corner of the screen).

Setting a Start Date/Due Date for a Task

Setting start dates and due dates allows you to add tasks to any calendar your device can access and allows Power.ME to give you reminders.

- To set a start date/due date, add a new task or tap an existing one to open the Task Details page.
- Tap on the *Start Date* or *Due Date* field (scroll down if it doesn't appear on your screen).
- Tap your desired calendar date (you can navigate through the months by tapping the forward and back arrows at the top of the calendar).
- To set the time or edit the day, scroll through the selection lists that appear after choosing the date. Align the time and day you want in the shaded bar. You may also choose to make a project an all day event.
- Tap *Done* (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

Repeating a Task

- To repeat a task, add a new task or tap an existing one to open the Task Details page.
- Tap the *Repeat* field (scroll down if it doesn't appear on your screen).

- Scroll through the options and align your selection in the shaded bar.
- Tap *Done* (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

Setting a Reminder for a Task

- To set a reminder for a task, add a new task or tap an existing one to open the Task Details page.
- Tap the *Reminder* field (scroll down if it doesn't appear on your screen).
- Scroll through the options to choose how far in advance you'll be reminded of the task. You'll need to select the number and the unit of time. You can set the reminder in terms of days, hours, or minutes. Align your selection in the shaded bar.
- Tap *Done* (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

Adding a Task to Your Device's Calendar

Once you've set start and due dates for your task, you can add it to any calendar your device has access to.

- To add a task to your calendar, add a new task or tap an existing one to open the Task Details window.
- Tap the *Add to Calendar* field.
- In the Calendars window, tap the calendar you want to add the task to. The selected calendar will have a checkmark in the right-hand side of the cell. If later you decide to remove a task from your calendar, tap the selected calendar again. The checkmark will disappear and the task will be removed from the calendar.
- Once you've made your selection, tap the *Done* (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

Assigning a Task

Assigning tasks to your team members allows you to delegate efficiently and stay notified on and review the task's status. NOTE: To assign a task you must be a subscribed Power.ME Sync & Share user.

- Either add a new task or tap an existing one to open the Task Details page.
- Scroll down to the *Assign To* field and tap it.
- Type your team member's email* into the field at the top and tap the blue plus sign (+). Continue doing this until you've added everyone you want to assign the task to. (Alternately, you can tap the address book icon in the lower right corner of the screen to add team members who are in the contacts list for your device.)
- Tap *Done* (in the upper right corner of the screen). You'll see a full list of the people who are assigned to this task.
- Tap *Done* (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.
- Once you tap the *Sync* button on the Power.ME Toolbar, notifications will be sent to those who have been assigned to the task.

*You can assign tasks to team members who do not have Power.ME: their assigned tasks will be emailed to them.

Adding Notes to a Task

Adding notes can help you and your team members stay on the same page when it comes to collaborative tasks.

- Either add a new task or tap an existing one to open the Task Details page.
- Scroll down to the *Notes* space—the lined yellow field—and tap it. Once your cursor and keyboard appear, you can start typing.*
- When you're finished, tap the keyboard icon in the upper right cor-

ner of the screen to minimize your keyboard.

- Either continue editing task details or tap *Done* (in the upper right corner of the screen).

*If you prefer, you can view a full-screen note by tapping the expand icon in the top left corner of the Notes field. Inside the full screen mode you have access to some extra options via the Actions button in the top left corner of the screen. When you're done typing up the note, tap *Done* in the upper right corner of the screen to return to the Task Details window.

Commenting on a Task

When a task is assigned to you, you can't edit its Notes, but that doesn't mean you can't add collaborative thoughts to it. Every task, project, and folder has a comment area where all team members can voice their thoughts.

- Tap on the shared task to open the Task Details window.
- Scroll down below the Notes field. Just underneath it is a white field that says, "Write comment here …" This is the comment field.
- Tap the comment field and use the keyboard to type your comment.
- To publish your comment, tap the keyboard icon in the upper right corner of the screen.
- Either continue editing task details or tap *Save* (in the lower right corner of the screen).

To delete a comment, swipe your finger across the comment's cell. A red Delete button will appear on the right-hand side of the comment field. Tap it and your comment will be deleted.

Reviewing a Task

Reviewing a task follows the same steps as marking a task as complete.

The only difference is that it can only happen when one of your team members tries to mark a task you assigned to them as complete. They can only mark a task as ready for review (when a task is ready for review, a white checkmark appears in its checkbox).

- To review a task you have assigned to someone else, look at the task in your list view.
- If the task has been completed, tap the task's checkbox icon. The white checkmark will turn blue and the task will be marked as completed.
- When you sync your device, the task will be marked as complete on your team member's Power.ME as well.

Viewing Completed Tasks in Your Tasks List

- To change the default setting that moves a task to your Completed section of the Home Menu when you check it off, tap the Settings button on the Power.ME Toolbar.
- Scroll to the option for *Completed Tasks*.
- Tap the toggle option so it changes from *Hide* to *Show*.
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

Filters

Adding a Filter

- To add a filter, tap the *Add* button in the Power.ME Toolbar.
- Tap *Filter* on the menu that appears (it has the icon with the blue cross in it).
- Type in a *Filter Name*.
- Tap *Done* (in the upper right corner of the screen).

If you tap on the cell of a filter (instead of the icon), you will see all the tasks that the filter is attached to. Within this filter view you can add a new task by tapping the empty space where it says, "Tap here to add a new task." Type in the task name and tap *Return* on your keyboard. This task will automatically have your filter attached to it. Some ideas for filter names are "Boss," for tasks you need to do with your boss and "Computer," for those tasks you need your desktop or laptop to complete.

Attaching Filters to Tasks

- To attach a filter to a task, add a new task or tap on an existing one to open the Task Details window.
- Tap the *Task Filter* field.
- Select the filter(s) you want by tapping them once. You can attach as many filters as apply. When a filter has been attached, a checkmark will appear next to its name.
- Tap *Done* (in the upper right corner of the screen) and either con-

tinue editing task details or tap *Done* again.

Removing Attached Filters

- To remove a filter that has already been attached to a task, tap on an existing task to open the Task Details window.
- Tap the *Task Filter* field.
- Remove filters(s) by tapping them once. When a filter is removed, the checkmark next to its name will disappear.
- Tap *Done* (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

Deleting a Filter

NOTE: You cannot delete filters that are currently attached to tasks.

- Tap on *Task Filters* on the Home Menu.
- Swipe your finger across the cell of the filter you want to delete.*
- Tap the *Delete* button that appears in the cell.

*Instead of swiping, you can also tap the filter's icon and tap the trash can icon in the top left corner of the Filter Details window.

Projects

Adding a Project

You can use projects to organize your tasks, folders, sub-projects, documents, and notes. Projects can be assigned just like tasks so your team can collaborate on all your important projects.

- There are two ways to add a project:

  Option 1: Tap the *Add* button on the Power.ME Toolbar running along the bottom of your screen; select the *Project* option from the menu that appears.

  Option 2: While you are in the main Project List, tap the empty space beneath your projects. After typing in the project title, tap *Return* on the keyboard. Once the project has been created, tap on its icon to edit its details.

- Enter any details about the project on the Project Details page that appears. Only the project's name is required information, but there are all sorts of options you can customize to help you organize better. See details on the project options below to learn more.

Deleting a Project/Folder

There are a two ways of removing a project or folder from your Project List:

- Swipe your finger along the project's cell. A red *Delete* button will appear in the cell. Tap it and your project will be deleted.

- Tap on the project, and then tap the trash bin icon in the upper left corner of the Project Details window.

Deleted items are stored in your Trash until you destroy them or empty the Trash. Should you need to restore a project, go to the Trash, tap the project you want to restore, and select *Restore* from the options that appear.

Organizing Items within Projects

Power.ME automatically organizes projects in alphabetical order by name. Information within a project or folder is also alphabetized, but the items are divided by type. Projects and folders are grouped together first, then tasks, and then documents.

- If you want to edit the order of the items within these divisions, tap the *Actions* button in the upper right corner of the screen.
- Tap *Re-Order* from the menu that appears.
- Place your finger on the three-lined icon that appears on the right-hand side of the items' cells. This lets you "grab" that item.
- Drag the item up or down into the position you want. Continue re-ordering items until you have your ideal order. (NOTE: Items can only be organized within their divisions. That means that tasks will still always group with the other tasks, and tasks will always come after projects and folders, etc.)
- When you're finished re-ordering, tap *Done* in the upper right corner of the screen.
- If you ever want to undo your re-ordering and return to alphabetical order, tap the *Actions* button and tap *Sort A–Z*.

Making Sub-projects (the Parent Option)

You can organize projects and folders under parent projects so you can keep things in order and get things done as efficiently as possible.

- Either add a new project or tap the icon for an existing one to open the Project Details page.
- Tap the *Parent* field.
- Select the parent project you want from the list on the left. (If you later decide to make a sub-project a root project, set the parent to *None*.) To select a project or folder, tap the circle icon next to it. If you want to select a project or folder that is inside one of your root projects or folders, tap the root folder and you'll be able to view its contents.
- Tap *Done* (in the upper right corner of the screen) and either continue filling out project details or tap *Done* again.

Changing a Project's Status

A project's status refers to where it is in terms of completion. Possible statuses are *None, Assigned, Accepted, Declined, In Progress, On Hold, Canceled, Ready for Review*, and *Complete*. Most of these options are for letting your team members know about where the project is going.

- Add a new project or tap an existing one to open the Project Details window.
- Tap the *Status* field.
- Tap the status you want to assign to the task. You can set the status to be any of the available options. (Marking it as Complete will move it from your Project List to your Completed List.)
- Either continue editing task details or tap *Done* (in the upper right corner of the screen).

Converting a Project to a Folder (or a Folder to a Project)

- To convert a project to a folder (or a folder to a project), tap the icon for an existing project to open the Project Details page.
- Find the *Project or Folder* field and tap the *Folder* button in it (when

converting a folder to a project, tap the *Project* button).

- Either continue filling out project details or tap *Done* (in the upper right corner of the screen).

Requiring a Password to View/Edit a Project or Folder

With Power.ME you share a lot of data. To ensure you don't accidentally share private information, you can choose to password protect certain projects and folders. When a project/folder is password protected, you must enter your Power.ME password to view or edit it. (NOTE: To password protect projects and folders, you must register a free Power.ME account.)

- To password protect a project, add a new project or tap the icon for an existing one to open the Project Details page.
- Find the *Password Protection* field and tap the toggle option so it changes from *Off* to *On* (if you want to remove the password protection, change it from *On* to *Off*).
- Enter your Power.ME Password and tap *Return* on your keyboard or Submit in the password window. Either continue editing project details or tap *Done* (in the upper right corner of the screen).

Now whenever you want to access this project's contents or details, you will have to enter your Power.ME password. To turn off the password protection repeat these same steps, only make sure that when you're finished the Password Protection option is switched to *Off*.

Setting a Start Date/Due Date for a Project

Setting start dates and due dates allows you to add projects any calendar your device can access and allows Power.ME to give you reminders.

- To set a start date/due date, add a new project or tap the icon for an existing one to open the Project Details page.
- Tap on the *Start Date* or *Due Date* field (scroll down if it doesn't ap-

pear on your screen).

- Tap your desired calendar date (you can navigate through the months by tapping the forward and back arrows at the top of the calendar window).
- To set the time or edit the day, scroll through the selection lists that appear after you choose the date. Align the time and day you want in the shaded bar. You may also choose to make a project an all day event by tapping the *All Day Event* button at the bottom of the screen.
- Tap *Done* (in the upper right corner of the screen) and either continue filling out project details or tap *Done* again.

Adding a Project to Your Device's Calendar

Once you've set start and due dates for your project, you can add it to any calendar your device has access to.

- To add a task to your calendar, add a new task or tap an existing one to open the Task Details window.
- Tap the *Add to Calendar* field.
- In the Calendars window, tap the calendar you want to add the task to. The selected calendar will have a checkmark in the right-hand side of the cell. If later you decide to remove a task from your calendar, tap the selected calendar again. The checkmark will disappear and the task will be removed from the calendar.
- Once you've made your selection, tap the *Done* (in the upper right corner of the screen) and either continue editing task details or tap *Done* again.

Assigning a Project

When assigning individual tasks is just too inefficient, you can assign entire projects and folders so you and your team can stay on track. NOTE: To assign a project or folder you must be a subscribed Power.ME Sync

& Share user.

- Either add a new project or tap the icon for an existing one to open the Project Details page.
- Scroll down to the *Assign To* field and tap it.
- Type your team member's email address* into the field at the top and tap the blue plus sign (+). Continue doing this until you've added everyone you want to assign the task to. (Alternately, you can tap the address book icon in the lower right corner of the screen to add team members who are in the contacts list for your device.)
- Tap *Done* (in the upper right corner of the screen). You'll see a full list of the people who are assigned to the project.
- Tap *Done* (in the upper right corner of the screen) and either continue filling out project details or tap Done again.
- Once you tap the *Sync* button on the Power.ME Toolbar, notifications will be sent to those who have been assigned to the project or folder.

*You can assign projects to team members who do not have Power.ME: their assigned project will be emailed to them. However, for them to view more than just the project details window, they will need to register for a free Power.ME account. Once they have an account, they'll be able to view anything you assign to them.

Adding Notes to a Project

Adding notes can help you and your team members stay on the same page when it comes to collaborative projects.

- Either add a new project or tap the icon for an existing one to open the Project Details page.
- Scroll down to the Notes space (the lined yellow field).
- Tap it and start typing.*
- When you're finished, tap the keyboard icon in the upper right cor-

ner of the screen and either continue filling out project details or tap *Done* (in the upper right corner of the screen).

*If you prefer, you can view a full-screen note by tapping the expand icon in the top left corner of the Notes field. Inside the full screen mode you have access to some extra options via the Actions button in the top left corner of the screen. When you're done typing up the note, tap *Done* in the upper right corner of the screen to return to the Project Details window.

Commenting on a Project

When team members are collaborating on a project created by another user, they can't edit the notes, but the can comment on it so everyone's voice can be heard.

- To comment on a project, tap the icon for an existing project to open the Project Details page.
- Scroll past the Notes field. Underneath it there is a field that says, "Write comment here . . ." This is the comment field.
- Tap on this field and type your comment.
- To publish your comment, tap the keyboard icon in the upper right corner of the screen.

To delete a comment, swipe your finger along the comment's cell. A red *Delete* button will appear in the cell. Tap it and your comment will be deleted.

Media Files

Creating a Note

- To create a regular text note, tap *Add* on the Power.ME Toolbar.
- Tap *Note* (the icon of the clipboard, a written-on piece of paper, and pen).
- Type your note using the keyboard.
- When you're finished, tap the keyboard icon in the upper right corner of the screen and then click *Done* (in the same place).
- On the next screen you have the options of giving the note a title, organizing it into a project or folder (see "Organizing Media Files into Projects/Folders" below), and sharing it with your team members (see "Sharing Media Files" below).
- After you're satisfied with how the options are set up, tap *Done* in the upper right corner of the screen.

You'll now be able to find your note by tapping on the Documents option on the Home Menu. Media documents are organized according to the project or folder they are organized into. If you didn't organize the document into a project or folder, it will be under the *No Project* heading.

Editing a Note

- To edit the note details (title, assignments, etc.), tap on its icon to open the Document Details window.

- Edit any of the note details (see "Organizing Media Files into Projects/Folders" or "Sharing Media Files" below).
- To edit the note itself, tap inside Notes space (the lined yellow field), then type using the keyboard.* (Or you can tap the note's cell from any list view.)
- When you're finished, you can minimize your keyboard by tapping the icon in the upper right corner.
- Either continue editing the note details or tap *Done* (in the upper right corner of the screen).

*If you want to view the note in a full-screen mode, tap the expand button in the upper left corner of the Notes field. When you've finished, tap Done in the upper right corner of the screen.

Using the Extra Note Options

In the full-screen note view, you have access to some extra options. View them by tapping the *Actions* button in the upper left corner of the screen. From this menu you have five options:

- *Delete the note*. If you tap this option you will need to confirm your choice (by tapping *Yes*) before the note is deleted.
- *Print the note*. Your device must have printers available to use this option.
- *Create Task*. You can convert a note into a task. You will need to confirm your choice (see "Converting a Note to a Task" below).
- *Send Email*. You can email your notes to team members (see "Emailing a Note" below).
- *Insert Date*. Power.ME will automatically insert the date and time wherever your cursor is on the note. (The time stamp appears in DAY MONTH YEAR HOUR:MINUTE format, i.e. 1 Jan 2011 12:00 PM.)

Converting a Note to a Task

- Either add a new note or expand an existing note into full-screen view.
- Tap the *Actions* button.
- Tap *Create Task*.
- Confirm that you want to change the note into a task by tapping *Yes*.
- The new task will appear in your Tasks List and will be organized into the same project or folder as it was when it was a note. You can now edit and interact with it as a task.

Emailing a Note

- Either add a new note or expand an existing note into full-screen view.
- Tap the *Actions* button.
- Tap *Send Email*.
- Tap the *To* field and type in your team members' email address. You can also tap the blue plus sign (+) on the right of the To field to select recipients from your device's contacts list.
- If you need to edit the sender email address, tap the *From* field and select the email address you would like to send from. (This requires multiple addresses to be programmed into your Power.ME and device.)
- Before sending, you can edit the Subject and the body of the email.
- When you're ready to send, hit *Send* in the upper right corner of the email window. If you instead choose not to send the email right now, tap *Cancel* in the upper left corner of the email window and choose to either delete or save the draft email. The draft will save to the email account you were sending from.

Deleting a Note

There are three ways to delete a note:

- Swipe your finger along the note's cell in a list view. Tap the red *Delete* button that appears in the cell.
- Tap the note's icon to open the Document Details window. Tap the trash can icon in the upper left corner of the screen. Confirm your choice by tapping *Yes*.
- When viewing a full-screen note, tap the *Actions* button in the upper left corner of the screen. Tap *Delete* from the options that appear and confirm your choice by tapping *Yes*.

Creating a Drawing

You can use drawings to sketch (in full color) inspirations and ideas for your projects that can't be contained in words.

- Tap *Add* on the Power.ME Toolbar.
- Tap *Drawing* (the icon of the clipboard, a blank piece of paper, and paint brush).
- Use your finger to draw along the Drawing Pad.
- To change the color of your pencil, tap the color wheel on the toolbar along the bottom of the screen. Then drag the color picker to the color you want. You can adjust shade and tint values (black and white) by using the color bar at the bottom of the Choose a Color window. Dragging to the right adds more black; dragging to the left adds more white. When you have the color you want, tap *Done* (in the upper right corner of the screen).
- To erase, tap the eraser button on the toolbar along the bottom of the screen. You can choose to erase the foreground (the drawing you have done since opening the picture) or the background (the parts of the drawing that were there before you most recently opened it).

- To clear the entire foreground, background, or drawing pad, tap the *Clear* button on the toolbar along the bottom of the screen. Then tap the option you want to clear: the foreground, background, or all layers of the drawing pad.
- When you're satisfied with your drawing, tap *Save* (in the upper right corner of the screen).
- The next page allows you to edit other details about the drawing. You can edit the title, organize it into a project or folder (see "Organizing Media Files into Projects/Folders" below), share it with a team member, or add a note.
- After you're done editing, tap *Done* in the upper right corner of the screen.

Printing a Drawing

Your device must have printers available to use this option.

- To print a drawing, add a new drawing or tap the cell of an existing one to open it.
- Tap the *Actions* icon in the lower right corner of the screen.
- Select your printer, your range, and your number of copies.
- Tap *Print*.

Emailing a Drawing

- To email a drawing, add a new drawing or tap the cell of an existing one to open it.
- Tap the envelope icon in the lower right corner of the screen.
- Tap the *To* field and type in your team members' email address. You can also tap the blue plus sign (+) on the right of the To field to select recipients from your device's contacts list.
- If you need to edit the sender email address, tap the *From* field and

select the email address you would like to send from. (This requires multiple addresses to be programmed into your Power.ME and device.)

- Before sending, you can edit the Subject and the body of the email.
- When you're ready to send, hit *Send* in the upper right corner of the email window. If you instead choose not to send the email right now, tap *Cancel* in the upper left corner of the email window and choose to either delete or save the draft email. The draft email will save to the email account you were sending from.

Deleting a Drawing

You can delete a drawing in three ways.

- If you're currently drawing, tap the trash can icon in the lower left corner of the screen and then confirm your choice by tapping *Yes*.
- If you're viewing the drawing in a list, swipe your finger along the drawing's cell. Tap the red *Delete* button that appears on the right-hand side of the cell.
- Tap on the drawing's icon from a list to view the Document Details window. Tap the trash can icon in the top left corner of the window. Confirm your choice by tapping *Yes*.

Deleted items are stored in your Trash until you destroy them or empty the Trash. Should you need to restore a project, go to the Trash, tap the project you want to restore, and select *Restore* from the options that appear.

Creating an Audio Note

When your thoughts are running faster than you can type, try using an audio note instead of the regular kind. Audio notes can run up to 15 minutes long, so you can capture your lightning-speed inspiration and organize it into your Power.ME system.

- Tap *Add* on the Power.ME Toolbar.

- Tap *Audio* (the icon of the microphone).
- The audio note automatically starts recording. To pause the recording, tap on its cell once; to continue recording, tap the cell again.
- When you've finished, tap the square icon on the left-hand side of the cell.
- If you want to edit the audio note's details after you finish, tap the microphone icon to open the Document Details window. From there you can edit the audio note's title, organize it into a project or folder, share it with a team member, or type notes. You can also play the audio note from the Document Details window. When you're finished editing the note's details, tap *Done* in the upper right corner of the screen.
- You can play an audio note either by opening the Document Details window or by tapping the audio note's cell.

Emailing an Audio Note

- To email an audio note, tap on its icon to open the Document Details window.
- Tap the *Send Email* button in the lower right corner of the screen.
- Tap the *To* field and type in your team members' email address. You can also tap the blue plus sign (+) on the right of the To field to select recipients from your device's contacts list.
- If you need to edit the sender email address, tap the *From* field and select the email address you would like to send from. (This requires multiple addresses to be programmed into your Power.ME and device.)
- Before sending, you can edit the Subject and the body of the email.
- When you're ready to send, hit *Send* in the upper right corner of the email window. If you instead choose not to send the email right now, tap *Cancel* in the upper left corner of the email window and choose to either delete or save the draft email. The draft email will save to the email account you were sending from.

Deleting an Audio Note

You can delete an audio note in two ways.

- If you're viewing the audio note in a list, swipe your finger along its cell. Tap the red *Delete* button that appears on the right-hand side of the cell.
- Tap on the audio note's icon from a list to view the Document Details window. Tap the trash can icon in the top left corner of the window. Confirm your choice by tapping *Yes*.

Deleted items are stored in your Trash until you destroy them or empty the Trash. Should you need to restore an audio note, go to the Trash, tap the note you want to restore, and select *Restore* from the options that appear.

Uploading Photos

You can upload photos that are on your device to your Power.ME

- Tap *Add* on the Power.ME Toolbar.
- Tap *Photo* (the icon with a landscape image).
- Browse through your photo albums and select an image to upload. (To browse through the images, tap the album name to see its contents and then tap on the image you want.)
- In the next screen, add a title to the image by tapping the *Title* field where it says, "Image Title" in the upper left part of the screen.
- Tap *Done* in the upper right corner of the screen.
- The next page will show the usual Document Details view where you can organize the image into a project or folder, assign and share it will team members, and add notes and comments. When you're done editing the details, tap *Done* in the upper right corner of the screen.

Emailing a Photo

- To email a photo, tap on its icon to open the Document Details window.
- Tap the *Send Email* button in the lower right corner of the screen.
- Tap the *To* field and type in your team members' email address. You can also tap the blue plus sign (+) on the right of the To field to select recipients from your device's contacts list.
- If you need to edit the sender email address, tap the *From* field and select the email address you would like to send from. (This requires multiple addresses to be programmed into your Power.ME and device.)
- Before sending, you can edit the Subject and the body of the email.

When you're ready to send, hit *Send* in the upper right corner of the email window. If you instead choose not to send the email right now, tap *Cancel* in the upper left corner of the email window and choose to either delete or save the draft email. The draft email will save to the email account you were sending from.

Using the Camera

You can take photos inside Power.ME if your device is equipped with a camera.

- Tap *Add* on the Power.ME Toolbar.
- Tap *Camera* (the icon with a camera in it).
- Aim the camera at what you want to take a picture of and tap the camera icon at the bottom of the screen. (If your device has a camera on the screen side and the back side, you can switch between the two cameras by tapping the icon in the upper right corner of the screen.)
- If you like the way the photo looks, tap *Use* in the lower right corner of the screen. (If not, tap *Retake* in the lower left corner.)

- In the next screen, add a title to the image by tapping the *Title* field where it says, "Image Title" in the upper left part of the screen.
- Tap *Done* in the upper right corner of the screen.
- The next page will show the usual Document Details view where you can organize the image into a project or folder, assign and share it will team members, and add notes and comments. When you're done editing the details, tap *Done* in the upper right corner of the screen.

Organizing Media Files into Projects/Folders

Organize your media files into projects and folders so you can easily find what you need.

- Either add a new media file or tap the icon of an existing one to open the Document Details window.
- Tap on the *Project or Folder* field—this will allow you to choose either a project or a folder for the task.
- Select the project you want from the list on the left. (If you later decide to make remove the task from the project, select *None*.) To select a project or folder, tap the circle icon next to it. If you want to select a project or folder that is inside one of your root projects or folders, tap the root folder and you'll be able to view its contents.
- When you have selected the project you want, tap *Done* (in the upper right corner of the screen). Afterwards either continue editing the media file's details or tap *Done* again.

Sharing Media Files

NOTE: To share and assign files you must be a subscribed Power.ME Sync & Share user.

- Either add a new media file or tap the icon of an existing one to open the Document Details window.
- Tap the *Assign To* field.

- Type your team member's email address into the field at the top of the Select window and tap the blue plus sign (+) to add them.* Continue doing this until you've added everyone you want to assign the file to. You can also enter email addresses by tapping the envelope icon at the bottom left of the Select window. Tapping on the address book icon at the bottom right of the Select window allows you to choose team members from your device's contacts list.
- Tap *Done* (in the upper right corner of the Select window) and either continue editing document details or tap *Done* (in the upper right corner of the screen).
- Once you tap the *Sync* button on the Power.ME Toolbar, notifications will be sent to those who have been assigned to the media file.

*You can assign media files to team members who do not have Power.ME: their assigned file will be emailed to them. However, for them to view more than just the document details window, they will need to register for a free Power.ME account. Once they have an account, they'll be able to view anything you assign to them.

Viewing Other File Types

You can view in Power.ME files with the following extensions:

- iWorks: key, numbers, pages
- Microsoft Office: doc/docx, xls/xlsx, ppt/pptx/pps
- Audio: mp3, m4a
- Other: pdf (except packaged pdf files), rtf, jpg, png

Settings

Selecting Your Power.ME View

To change Power.ME's default settings, tap the *Settings* button on the Power.ME Toolbar (the button with the gear icon). Power.ME has two available views: default and executive. All the functions of Power.ME remain essentially the same, but they are called by different names in the different views. What is the Project List in default view is the File Cabinet in executive view; default projects are executive drawers; default priority is executive highlight. The default order of the Home Menu is slightly different between the two views as well.

- If you want to switch from default view to executive view, find the Select Power.ME View field and tap *Default*.
- Scroll the option you want into the shaded bar.
- Tap *Settings* in the upper left corner of the screen.
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

Changing the Size of the Table Cells

You can change the size of the cells in the list views to one of three options: small, medium, and large.

- Scroll to the *Table Cell Size* field.
- Tap the size you want. The button of the selected size will be a darker color than the others.

- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

Displaying Completed Tasks

The Completed Tasks setting determines whether or not completed tasks will display in your regular task lists.

- To show completed tasks in your regular task lists, tap the button next to the field title until it says *Show*; to show completed tasks only in the Completed Tasks list, tap it until it says *Hide*.
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

Download Documents during Sync

Documents do not automatically download during the syncing process so the sync isn't slowed down by the large files. Instead, Power.ME sets up the icons for the documents in the list views and only downloads the documents when you view them. You can choose to have Power.ME instead download documents during its sync by adjusting the default setting. NOTE: This settings option only applies to subscribed Power.ME Sync & Share customers.

- Scroll to the *Download Documents during Sync* field.
- Tap the button next to the field title to toggle the option from *No* to *Yes*. Your device will automatically exit the Settings window and download any documents it is missing that are on the server.
- To restore the default setting, open the Settings window and toggle the Download Documents during Sync option to *No*.

Displaying the Overdue Badge

The Overdue Badge setting determines whether or not an icon displaying the current number of overdue items appears in the Due Date cell of the Home Menu.

- To ensure this badge is not displayed, tap the button next to the field title until it says *Hide*; to ensure it is displayed, tap until it says *Show*.
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

Displaying the Urgent Priority Badge

The Urgent Priority Badge setting determines whether or not an icon displaying the current number of urgent-priority items appears in the Priority cell of the Home Menu.

- To ensure the badge is not displayed, tap the button next to the field title until it says *Hide*; to ensure it is displayed, tap until it says *Show*.
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

App Icon Badge

The App Icon Badge setting determines whether or not a badge displaying the current number of overdue and urgent items appears on the Power.ME icon when you are on your device's home screen.

- To ensure the badge is not displayed, tap the button next to the field title until it says *Hide*; to ensure it is displayed, tap until it says *Show*.
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

Showing Tasks as In Progress

The Show Tasks as In Progress option determines what happens when you tap the checkbox icon next to a task. If the option is on, the task's status goes from *None* to *Complete* and a blue checkmark appears in the task's checkbox. If the option is off, tapping the icon once will mark the task as *In Progress* and a small blue circle appears in the task's checkbox. A second tap marks the task as Complete.

- To show tasks as In Progress, tap the button next to the field title until it says *On*; to only show them as unfinished and Complete, tap the button until it says *Off*.
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

Sending Feedback to Power.ME

Your feedback can make Power.ME an even better tool to help you manage your life.

- To send us your thoughts, tap the *Send feedback to Power.ME* option in the Settings Window.
- Your device will open a draft email to our feedback email account. It automatically has some data attached that is helpful when we are trying to solve problems. If you do not need support help, but have other feedback, feel free to remove the attachment before sending the email.
- Edit the text of the email to include your feedback.
- Tap *Send* in the upper right corner of the screen to send the email. (If you decide not to send the email right now, tap *Cancel* in the upper left corner. You can then choose to delete the email or save it as a draft.)

Getting Power.ME Help Online

If something about Power.ME is giving you difficulty, you can access our Help features.

- To access the Help features, tap the *Show Power.ME Help* option in the Settings window.
- Your device will open a web browser window and navigate to power.me/gtd/support/faqs/user-guide/.
- Once you've found the main user guide page, tap on the iPhone/iPod version.
- Tap on the problem topic and read through the available help.
- If the user guide can't help you with the issue, either tap the Send feedback to Power.ME option in your Power.ME settings or tap the *Support* option from the menu bar at the top of the webpage.
- From the support page, you can call the Getting Started Hotline (the phone number is on the left side of the page under the Getting Started Hotline heading), or you can start an online chat with one of our representatives by tapping on the Live Help panel on the right side of the screen. (NOTE: Support is available Monday through Friday, 8:00 AM to 6:00 PM Mountain Standard Time.)

Adjusting Your Sync Options

The Sync Options setting determines whether or not your Power.ME syncs your content at times other than when you tap the Sync button on the Toolbar. (NOTE: This option only applies to subscribed Power.ME Sync & Share users.)

- To set the syncing option, tap your chosen option (*None, Auto*, or *Start/End**).
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

**None* means Power.ME will only sync when you tell it to by tapping the Sync button; *Auto* means Power.ME will sync any time you make and save a change to your content; *Start/End* means Power.ME will sync automatically when you open it and when you close it.

Syncing from a Specific Date

You can choose to sync from a specific date using the Sync from Date option. You can use this to retrieve items you have accidentally destroyed permanently. However, you should be careful when syncing this way, because any content you have created since the date you choose will be deleted. **There is no way to reverse this sort of loss.** (NOTE: This option only applies to subscribed Power.ME Sync & Share users.)

- To sync from a specific date, tap the *Sync from Date* field.
- Align the date and time you want to sync to in the shaded bar.
- Tap *Done* (in the upper right corner of the screen).

Changing Your Password

- Should you ever want to change your password, scroll to the bottom of the Settings window.
- Tap the *Change Password* option.
- Type your old password in the first line.
- Type your new password in the second line.
- Confirm your new password in the third line by retyping it.
- Tap *Submit* (in the upper right corner of the Password window).
- Either continue adjusting your settings or tap *Done* (in the upper right corner of the screen).

Adding Alternate Email Accounts

You may choose to add any alternate email accounts you have to your Power.ME account so anything that gets shared or assigned to those accounts will automatically feed into your Power.ME.

- To add an alternate email account, scroll to the bottom of the Settings window.

- Tap the *Add Alternate Emails* to My Account option.
- Your device will navigate to a webpage where you can add email accounts.
- Tap the *Email 2* field.
- Type in your alternate email.
- Tap *Add Email* (to the right of the field where you typed your email).*
- A verification email will be sent to the alternate email account. Open your alternate email account and open the verification email.
- Follow the instructions in the email to verify the alternate email address.
- After you've verified the alternate address, you can close the web pages associated with adding or verifying your account and return to your Power.ME page.

*At this point you can return to your Power.ME by tapping *Done* (in the upper right corner of the screen) and wait to verify the address until a time that is convenient for you.

Thank you for choosing Power.ME. If you have any further questions, contact our support team at support @power.me.