Power.ME
Web 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.

General Information

Power.ME Toolbar

The Power.ME Toolbar is the black bar running along the right edge of your Power.ME window. It is available from almost all the pages within the app and allows you to quickly add tasks and other items, access help with Power.ME, change your settings, search your Power.ME content, and return to the home page view. The Power.ME Toolbar always appears on the right edge of the screen.

Home Menu

The Home Menu appears in the left-hand panel of the Power.ME window in most pages within the app. It allows you to easily navigate into your essential Power.ME functions and lists from almost all the pages within the app. 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. (To edit this order, hover over the button in the lower right corner of the Home Menu. Then click *Change Order*. To shuffle projects, click the button and drag the item where you want it to go. When you're finished, click *Done* in the lower left corner of the Home Menu. If you ever want to reset to the default order, hover over and click *Reset Order*.)

Documents

Your Documents List will show all of your documents (be they Power.ME notes 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.)

Inbox

When other users assign you tasks, projects, or folders, they appear in your Inbox. Tasks that you create yourself, but don't organize into a project or folder, will also show up in your Inbox. From the Inbox you can edit items and organize them into your projects and folders so you can find them quickly and easily in the other lists. (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 the default settings, it will also display completed tasks). Tasks are organized alphabetically and divided according to the project or folder they're stored in. (See the Tasks portion of the user guide for more information.)

Projects

Your Projects List displays all your projects and folders, which are organized alphabetically. To view the content 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 Filters 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 the content others have shared with you and 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 for more information.)

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 appear in red. (Both the Tasks and Projects portions of the user guide have more information 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. The cells of priority items will also be different colors so you can find them easily in your normal Task List. You can edit the priority of a task by editing the Task Details. (See the Tasks portion of the user guide for more information.)

Completed

Your Completed List displays all your completed tasks and projects.

Trash

Your Trash displays all the items you have deleted. From the Trash you can restore or destroy trashed items or you can empty the trash to permanently destroy all the trashed items.

Inbox, Team Room, & Trash

Receiving and Organizing Items in the Inbox

The inbox is where you find all your new tasks and all the unorganized tasks, projects and folders 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 fit appropriately, take the time now to create one. (See the Projects portion of the user guide for more information on creating a project or folder.)
- Once there is somewhere for the unorganized item to go, click the cell of an unorganized task or the icon of an unorganized project or folder to open the Details window.
- Click the *Project* field in the details options (if the item is a project or folder, the field is called Parent).
- The left-hand panel will show the Select Project panel, which displays you your projects and folders. Select the project or folder you want to organize the new item into by clicking on it. If you can't see the project or folder you want, or you want to find it faster, click the search bar in the top of the Select Project panel and type the project or folder name.*
- Once you've chosen a project/folder, the Select Project panel will disappear. Now you can either continue editing the item's details or click *Save* in the bottom right corner of the screen.

*You can also streamline what you're viewing by clicking *Shared* or *Mine* right under the search bar. These will limit the projects and folders to either those that you and others have shared with each other or items you have shared with no one.

Navigating the Team Room

Your Team Room displays all the content others have shared with you and 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: Click project and folder cells to see their contents; click project and folder icons to view their details; click document and task cells to see 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, click 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. However, you can add comments to an item after opening the item's details window (for projects/folders, click their icon; for tasks, click their cell; for documents, click either the icon or the cell). (To learn more about commenting on shared content, see the Tasks or Projects 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.

- Click *Trash* on the Home Menu.

- Click on the item you want to restore (it doesn't matter if you click the icon or the cell; both do the same thing).
- Click *Restore* in the options 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, click *Trash* on the Home Menu.
- Click on the item you want to destroy (it doesn't matter if you click the icon or the cell; both do the same thing).
- Click *Destroy* in the options window that appears.

If you destroy a project, all its contents are also destroyed and cannot be restored.

Emptying the Trash

- If you want all the items in your Trash to be destroyed, click *Trash* on the Home Menu.
- Click the *Empty Trash* button in the upper right corner of the screen.
- Confirm your choice by clicking *Yes*. After you do, the items will be permanently destroyed (and irretrievable).

Tasks

Adding a Task

- Click the *Task* button (the checkmark icon) on the Power.ME Toolbar.*
- Enter any details about the task on the Task Details window 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, click the *Save* button in the lower right corner of the screen.

*If you are currently viewing the contents of a project or folder, when you create a new task it will automatically be assigned to the project or folder Power.ME has open. You can change this by clicking on the Project field. (See "Organizing a Task into a Project/Folder" below for more information.)

Deleting a Task

There are a two ways of removing a task from your Task List:

- Click on the task's cell (not its icon), then click the *Delete* button in the lower right corner of the Task Details window. The task will move to your Trash.
- Mark the task as completed (see "Changing a Task's Status" below). The task will move to your Completed List. 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 Task 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, click the task you want to restore, and select Restore from the options that appear.

Attaching a Filter to a Task

You can use filters to organize tasks by the place or person you need 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 attach a filter to a task, add a new task or click an existing one to open the Task Details window (when trying to view a task's details, click on its cell, not on its icon).
- Click the *Task Filter* field.
- Click the empty square icon next to all the filters you want to attach to the task.* (Multiple filters can be attached to the same task.) When a filter is attached to a task, a checkmark appears in the icon next to it.
- When you have made your selections, click the *Done* button (at the bottom of the Select Filter window) and either continue editing task details or click Save (in the lower right corner of the screen).

*If you want to attach a filter you have not yet created, you can click "Create New Filter" in the lower right corner of the Select Filter window. Type in the filter name in the *Filter Name* field, then click *Save*. Then click the Task Filter field again and attach the filter.

Removing a Filter from a Task

- To remove a filter from a task, click the task's cell (not its icon) to open the Task Details window.

- Click the *Task Filter* field.
- Click the checkmark icon next to all the filters you want to remove from the task. When a task is removed, the checkmark will disappear.
- When you have removed the filters you wanted to remove, click the *Done* button (at the bottom of the Select Filter window) and either continue editing task details or click *Save* (in the lower right corner of the screen).

Organizing a Task into a Project/Folder

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

- Either add a new task or click an existing one to open the Task Details window.
- Click on the *Project* field.
- A panel, titled Select Project, will appear on the left and list your projects and folders. Click on the project you want. (If you later decide to make remove the task from the project, click *None* at the bottom of the selection list.) By default, projects and folders are organized by title, first by their root project or folder and then by subprojects and folders. If you can't see the project you want, or want to find it faster, click on the *Search* field at the top of the list on the left and type in the name of the project/folder you want.*
- After you've clicked the project you want, you can either continue editing task details or click *Save* (in the lower right corner of the screen).

*You can also streamline what you're viewing by clicking *Shared* or *Mine* right under the search bar. These will limit the projects and folders to either those that you and others have shared with each other or items you have shared with no one.

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 *Completed*. Most of these options are for letting your team members know where the task is and where it's going. You can change the 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

- Add a new task or click an existing one to open the Task Details window.
- Click the *Status* field.
- Click 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 click *Save* (in the lower right corner of the screen).

From a List

- Click 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 (and the icon will have a blue checkmark in it). If someone else created the task and assigned it to you, it will change the task's status from *Assigned* to *Ready for Review* (and the icon will have a white checkmark in it). (See "Reviewing a Task" below to learn more.)

*You can change this setting by clicking on the *Settings* button of the Power.ME Toolbar and finding the *Show Tasks as In Progress* field. If you change the selection from *No* to *Yes* and then submit your changes, clicking on a task's icon once will change its status to In Progress(and the icon will have a blue circle in it). Clicking 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 click an existing one to open the Task Details window.
- Click the *Priority* field.
- The priority options are *None, Low, Medium, High*, and *Urgent*. Click the appropriate priority level for the task. In your Task List, the task's cell background color will change according to its priority level (low priority items = light gray; medium = green; high = yellow; urgent = red). The task will also appear in your Priority List.
- Either continue editing task details or click *Save* (in the lower right corner of the screen).

Setting a Start Date/Due Date for a Task

Setting start dates and due dates allows you to set reminders for tasks and manage the timeframe of your workflow.

- To set a start date/due date, add a new task or click an existing one to open the Task Details window.
- Click on the *Start Date* or *Due Date* field.
- Click your desired calendar date (you can navigate through the months by clicking the forward and back arrows at the top of the calendar window).
- If you want to set a time, click the checkbox to the left of "Select a time" at the bottom of the Calendar window.
- Then click the hour, minute, and AM/PM boxes in turn and select the time you want by clicking the right numbers.
- Click *Done* (in the lower right corner of the Calendar window) and either continue editing task details or click Save (in the lower right corner of the screen).

Removing a Start Date/Due Date for a Task

- If you want to remove a task's start date or due date, click on that task to open the Task Details window.
- Click the gray X button on the right-hand side of the Start Date or Due Date field. The start date or due date will disappear.
- Either continue editing task details or click *Save* (in the lower right corner of the screen).

Setting a Reminder for a Task

NOTE: Before you can set a reminder for a task, you must give that task a due date.

- To set a reminder for a task, add a new task or click an existing one to open the Task Details window.
- Click the *Reminder* field.
- Click the best option for how far in advance you want to be reminded of the task. Options are available in terms of minutes, hours, days, weeks and months.
- Once you've chosen your reminder time, either continue editing task details or click *Save* (in the lower right corner of the screen).

Repeating a Task

NOTE: Before you can set a repeating schedule for a task, you must give that task a due date.

- To repeat a task, add a new task or click an existing one to open the Task Details window.
- Click the *Repeat* field.
- Click the option that suits your task (*Does not repeat, Daily, Weekly, Biweekly, Monthly*, or *Yearly*).

- After you've clicked the option you want, either continue editing task details or click Save(in the lower right corner of the screen).

Assigning a Task

Assigning tasks to your team members allows you to delegate tasks and stay notified on and review a task's status. NOTE: Though you can always receive tasks from others once you have a registered Power.ME account, to assign a task you must be a subscribed Power.ME Sync & Share user.

- Either add a new task or click an existing one to open the Task Details window.
- Click the *Assign To* field.
- Type your team member's email* into the field at the top of the Assign Task To window and click the plus sign (+) on the right to add it. Continue doing this until you've added the addresses of everyone you want to assign the task to. You can also choose recipients by clicking the *Add from Contacts* button in the lower right corner of the window. A list of people you have previously assigned tasks to will appear. Click the blue plus sign (+) to the right of your team members' names to add them to the assignment.
- Click *Done* (in the lower right corner of the window) and either continue editing task details or click *Save* (in the lower right corner of the screen).

*You can assign tasks to team members who do not have Power.ME. Their assigned tasks will be emailed to them. If you're wondering what a non-registered Power.ME user sees when assigned a task, see our Sharing Tasks with Non-Users page.

Removing a Task Assignment

- To remove a team member from a task assignment, click the task cell to open the Task Details window.
- Click the *Assign To* field.

- Click the red X to the right of the name of the team member(s) you want to remove.
- Click *Done* (in the lower right corner of the window) and either continue editing task details or click *Save* (in the lower right corner of the screen).

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.

- To add a note to a task, either add a new task or click an existing one to open the Task Details window.
- Click the *Notes* space—the lined yellow field—and start typing.
- When you're finished, either continue editing task details or click *Save* (in the lower right corner of the screen).

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.

- Click 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.
- Click the comment field and start typing.
- To publish your comment, click the blue plus sign (+) on the right-hand side of the comment field. Then either continue editing task details or click Save (in the lower right corner of the screen).

To delete a comment, hover over the comment's cell. A red X button will appear on the right-hand side of the comment field. Click it and confirm your choice by clicking *Yes*, 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, click the task's checkbox icon. The white checkmark will turn blue and the task will be marked as complete. This status change will appear in your team members' Power.ME as well.

Viewing Completed Tasks in Your Task List

- To change the default settings (which move remove completed tasks from your task list and store them in the Completed section of the Home Menu), click the *Settings* button on the Power.ME Toolbar.
- Find to the option for *Completed Tasks*.
- Click the *Show* toggle option.
- Either continue editing your settings or click *Save* in the lower right corner of the Settings window.

Changing the Order of Tasks in the Task List

You may choose to change the automatic alphabetical order of the tasks in your Task List.

- Click *Tasks* on the Home Menu.
- From the Task List, click the *Actions* button in the upper right corner

of the screen.

- Click *Change Order* on the menu that appears.
- A three-lined icon will appear on the right-hand side of the tasks' cells. Click and hold the icon of the item you want to move. This lets you "grab" it.
- Drag the task up or down into the position you want it in. Continue re-ordering tasks until you have your ideal order. (You can only move tasks within the project/folder divisions they're already organized into.)
- When you're finished, click *Done* (in the upper right corner of the screen).

Filters

Adding a Filter

- To add a filter, click the *Add* button in the Power.ME Toolbar.
- Click *Filter* on the menu that appears (it has the icon with the blue cross in it).
- Type in a *Filter Name*.
- Click *Save* (in the lower right corner of the window).

If you click on the cell of a filter (instead of the icon) in your Filter List, you'll see all the tasks that the filter is attached to. 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 click on an existing one to open the Task Details window.
- Click the *Task Filter* field.
- Select the filter(s) you want by clicking the box next to it once in the Select Filter window.* You can attach as many filters as apply to a task. When a filter has been attached, a checkmark will appear in the box icon.
- Click *Done* (at the bottom of the Select Filter window) and either continue editing task details or click Save (in the lower right corner of the screen).

*If you want to add a filter you haven't created yet, click *Create New Filter* (in the bottom right corner of the Select Filter window). Type in the Filter Name and click *Save* (in the lower right corner of the Filter Details window). This will take you back to the Task Details window. Click on the *Filter* field again and attach your new filter as you would normally.

Removing Attached Filters

- To remove a filter that has already been attached to a task, click on an existing task to open the Task Details window.
- Click the *Task Filter* field.
- Remove filter(s) by clicking the checkbox next to it once in the Select Filter window. When a filter is removed, its checkmark will disappear.
- Click *Done* (at the bottom of the Select Filter window) and either continue editing task details or click *Save* (in the lower right corner of the screen).

Deleting a Filter

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

- Click *Task Filters* on the Home Menu.
- Click the icon of the filter you want to delete.
- Click the *Delete* button (in the lower right 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 them.

- Click the *Add* button on the Power.ME Toolbar.
- Click the *Project* option from the menu that appears (the icon with the colorful binders).
- 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).
- When you're done editing the details, click *Save* (in the lower right corner of the screen).

Deleting a Project/Folder

- To delete a project or folder, click the project's icon to open the Project Details window.
- Click *Delete* (in the lower right corner of the screen).
- Confirm you choice by clicking *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, click the project you want to restore, and select *Restore* from the options that appear.

Organizing 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, click the *Actions* button in the upper right corner of the screen.
- Click *Change Order* on the menu that appears.
- A three-lined icon will appear in the right-hand side of the items' cells. Click and hold the icon of the item you want to move. This lets you "grab" it.
- 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 always group with the other tasks, and tasks will always come after projects and folders, etc.)
- When you're finished re-ordering, click *Done* in the upper right corner of the screen.

If you ever want to undo your re-ordering and return to alphabetical order, click the *Actions* button and click *Sort A-Z*.

Making Sub-projects

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 click the icon for an existing one to open the Project Details page.
- Click the *Parent* field.

- Click 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*.) By default, projects and folders are organized alphabetically by title, first by their root project or folder and then by the sub-projects and folders. If you can't see the project you want, or want to find it faster, click on the *Search* field at the top of the list on the left and type in its name.*
- After you've clicked the project you want, you can either continue editing project details or click *Save* (in the lower right corner of the screen).

*You can also streamline what you're viewing by clicking Shared or Mine right under the search bar. These will limit the projects and folders to either those that you and others have shared with each other or items you have shared with no one.

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 where the project is and where it's going.

- Add a new project or click an existing one to open the Project Details window.
- Click the *Status* field.
- Click the status you want to assign to the task. You can set the status to be any of the available options.
- Either continue editing project details or click *Save* (in the lower 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), click the icon for an existing project to open the Project Details page.

- Find the *Project or Folder* field and click the *Folder* button in it (when converting a folder to a project, click the *Project* button).
- Either continue editing project details or click *Save* (in the lower right corner of the screen).

Setting a Start Date/Due Date for a Project

Setting start dates and due dates allows you to manage the timeframe of your workflow.

- To set a start date/due date, add a new project or click the icon for an existing one to open the Project Details page.
- Click on the *Start Date* or *Due Date* field.
- Click your desired calendar date (you can navigate through the months by clicking the forward and back arrows at the top of the calendar window).
- If you'd like to set a time, click the checkbox to the left of "Select a time" at the bottom of the Calendar window.
- Then click the hour, minute, and AM/PM boxes in turn and select the time you want by clicking the right numbers.
- Click *Done* (in the lower right corner of the Calendar window) and either continue editing task details or click *Save* (in the lower right corner of the screen).

Requiring a Password to View or Edit a Project/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 its contents or edit its details.

- To password protect a project, add a new project or click the icon for an existing one to open the Project Details page.

- Find the *Password Protected* field and click *On* (if you want to remove the password protection, click *Off*). This will toggle the protection option.
- Enter your Power.ME Password and tap *Enter* on your keyboard or click *Submit* in the password window. Either continue editing project details or click *Save* (in the lower 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 the same steps, only make sure that when you're finished the Password option is switched to *Off*.

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 click the icon for an existing one to open the Project Details page.
- Click the *Assign To* field.
- Type your team member's email* into the field at the top of the Assign Project To window and click the plus sign (+) on the right to add it. Continue doing this until you've added everyone you want to assign the task to. You can also choose recipients by clicking the *Add from Contacts* button in the lower right corner of the window. A list of people you have previously assigned items to will appear. Click the blue plus sign (+) to the right of your team members' names to add them to the assignment.
- Click *Done* (in the lower right corner of Select window) and either continue editing project details or click *Save* (in the lower right corner of the screen).

*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 click the icon for an existing one to open the Project Details page.
- Scroll down to the *Notes* space (the lined yellow field).
- Click it and start typing.
- When you're finished, either continue editing project details or click *Save* (in the lower right corner of the screen).

Commenting on a Project

When a project 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.

- Click the icon for the shared project to open the Project Details page.
- Scroll down below the Notes field. Just underneath it is a white field that says, "Write comment here . . ." This is the comment field.
- Click on the comment field and start typing.
- To publish your comment, click the blue plus sign (+) on the right-hand side of the comment field. Then either continue editing project details or click Save (in the lower right corner of the screen).

To delete a comment, hover over the comment's cell. A red X button will appear on the right-hand side of the comment field. Click it and confirm your choice by clicking *Yes*, and your comment will be deleted.

Media Files

Creating a Note

In Power.ME you can create notes to help you capture and organize your ideas. You can also upload existing photos, audio clips, and computer files to Power.ME (see “Uploading a Photo” and “Uploading Other File Types” below). Once the media files are a part of your Power.ME, you can organize them into folders and projects and view them on any platform that has Power.ME.

- Click *Add* on the Power.ME Toolbar.
- Click *Note* (the icon of the clipboard, a written-on piece of paper, and pen).
- Click on the lined yellow field and type your note.
- On the left you have some options similar to what you’ll find in your Task or Project Details view. You must add a Note Title, and you can also choose to organize the note into a project, assign the note to a team member, or comment on the note. (See the different options below for more information.)
- When you’re finished, click *Save* in the lower right corner of the screen.

You’ll now be able to find your note by clicking on the Documents option on the Home Menu or by navigating into the project or folder you put it in. In the Documents List, items are organized according to the project or folder they are organized into, and 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 an existing note, click on it from one of your lists.
- Edit any of the note details (see "Organizing Media Files into Projects/Folders" or "Sharing Media Files" below).
- To edit the note itself, click inside Notes space (the lined yellow field) and type.
- When you're finished, click *Save* in the lower right corner of the screen.

Inserting the Date into a Note

- To put a time stamp in your note, either add a new note or click an existing one to open the Document Details window.
- Click inside the Notes space and make sure the flashing cursor is where you want the time stamp.
- Click *Insert Date* (in the upper right corner of the screen). The date appears in MONTH DAY, YEAR TIME format (ex. Apr 5, 2011 4:45 pm).

Deleting a Note

- To delete a note, click on it to open the Document Details view.
- Click *Delete* (in the lower right corner of the screen).
- Confirm your choice by clicking *Yes*.

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

Uploading an Audio File

You can upload audio files from your computer to your Power.ME

- Click *Add* on the Power.ME Toolbar.
- Click *Audio* (the microphone icon).
- Click the blue *Browse* button in the panel on the left to browse through your computer's files and select an audio file to upload.
- Double-click the file you want.
- The image's filename (ex. audio7.mp3) will automatically become the note title, but if you want to change it, click the field at the top of the panel on the left, delete the filename, and type in a new title. You can also choose to organize the note into a project, assign the note to a team member, or comment on the note. (See "Organizing Media Files into Projects/Folders" and "Sharing Media Files" below for more information.)

Uploading a Photo

You can upload photos from your computer to your Power.ME

- Click *Add* on the Power.ME Toolbar.
- Click *Photo* (the icon with a landscape image).
- Click the blue *Browse* button in the panel on the left to browse through your computer's files and select an image to upload.
- Double-click the image you want.
- The image's filename (ex. photo4.jpg) will automatically become the note title, but if you want to change it, click the field at the top of the panel on the left, delete the filename, and type in a new title. You can also choose to organize the note into a project, assign the note to a team member, or comment on the note. (See "Organizing Media Files into Projects/Folders" and "Sharing Media Files" below for more information.)

Uploading Other File Types

- To upload a file that isn't a photo, click *Add* on the Power.ME Toolbar.

- Click *Upload Documents or Images* (it's in the white bar underneath the nine basic options).
- Click the blue *Browse* button in the panel on the left to browse through your computer's files and select a file to upload.*
- Double-click the file you want.
- The file's filename (ex. document.doc) will automatically become the note title, but if you want to change it, click the field at the top of the panel on the left, delete the filename, and type in a new title. You can also choose to organize the note into a project, assign the note to a team member, or comment on the note. (See "Organizing Media Files into Projects/Folders" and "Sharing Media Files" below for more information.)

*You can upload and view files with the following extensions:

- Microsoft Office: doc/docx, xls/xlsx, ppt/pptx/pps
- OpenDocument: odt, ods, odp
- OpenOffice: sxw, sxc, sxi
- Adobe Creative Suite: ai, psd
- Audio: mp3, mp4, m4a, wav, aac
- Other: pdf (except packaged pdf files), rtf, jpg, tiff, pages, eps, ps, dxf, svg, ttf, xps, csv, tsv

Organizing Media Files into Projects/Folders

- To organize a note, photo or document into a project or folder, add a new one or click on an existing one to open the Document Details window.
- Click the *Project* field in the panel on the left.
- Click the project you want from the Select Project window that appears. (If you later decide to remove your document from the project, set the parent to None by clicking the *None* button in the

window's lower right corner.) By default, projects and folders in the window are organized by title, first by their root project or folder and then by the sub-projects and folders. If you can't see the project you want, or want to find it faster, click on the *Search* field at the top of the list and type in the name of the project/folder you want.

- After selecting a project, you can either continue editing the document's details or click Save (in the lower right corner of the screen).

Sharing Media Files

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

- To share or assign media files to others, add a new file or click on an existing one to open the Document Details window.
- Click the *Assign To* field in the panel on the left.
- Type your team member's email address into the field at the top of the Assign Task To window and click the plus sign (+) on the right to add it.* Continue doing this until you've added everyone you want to assign the task to. You can also choose recipients by clicking the Add from Contacts button in the lower right corner of the window. A list of people you have previously assigned tasks to will appear. Click the blue plus sign (+) to the right of your team members' names to add them to the assignment.
- Click *Done* (in the lower right corner of the Assign Note To window) and either continue editing document details or click *Save* (in the lower right corner of the screen). The team member(s) you've assigned to the media file will receive notifications of the assignment.

*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.

Commenting on a Media File

When a file is assigned to you, you can't edit its Notes, but that doesn't mean you can't add collaborative thoughts to it. Instead, you can add a comment.

- Click on the shared media file to open the Document Details window.
- Underneath the Notes field there is a white field that says, "Write comment here . . ." This is the comment field.
- Click the comment field and start typing.
- To publish your comment, click the blue plus sign (+) on the right-hand side of the comment field. Then either continue editing the document's details or click *Save* (in the lower right corner of the screen).

To delete a comment, hover over the comment's cell. A red X button will appear on the right-hand side of the comment field. Click it and confirm your choice by clicking *Yes*, and your comment will be deleted.

Organizing Media Files in the Documents List

Power.ME automatically organizes media files alphabetically and according to the project they belong to (files that aren't assigned to a folder appear in the No Project section at the bottom).

- If you want to edit the order of the items within these divisions, click the *Actions* button in the upper right corner of the screen.
- Click *Change Order* on the menu that appears.
- A three-lined icon will appear in the right-hand side of the items' cells. Click and hold the icon of the item you want to move. This lets you "grab" it.
- 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 project divisions, and the divisions will al-

ways be alphabetized.)

- When you're finished re-ordering, click *Done* in the upper right corner of the screen.

Settings

Selecting Your Power.ME View

To change Power.ME's default settings, click 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 click the drop-down arrow next to Default.
- Click *Executive*.
- Either continue adjusting your settings or click *Save* (in the lower right corner of the settings window).

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, click the *Show* option in the Completed Tasks field; to show completed tasks only in the Completed Tasks list, click *Hide*.

- Either continue adjusting your settings or click *Save* (in the lower right corner of the Settings window).

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, click the *Hide* option; to ensure it is displayed, click the *Show* option.
- Either continue adjusting your settings or click *Save* (in the lower right corner of the Settings window).

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, click the *Hide* option; to ensure it is displayed, click the *Show* option.
- Either continue adjusting your settings or click *Save* (in the lower right corner of the Settings window).

Showing Tasks as In Progress

The Show Tasks as In Progress option determines what happens when you click the checkbox icon next to a task. If No is selected, clicking an item's checkbox will mark is as complete. IfYes is selected, clicking an item's checkbox once will mark it as in progress (a small circle will appear in the box). A second click will then mark it as complete.

- To allow the in-progress click, click *Yes*; otherwise, click *No*.
- Either continue adjusting your settings or click *Save* (in the lower right corner of the Settings window).

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, click the *Send feedback to Power.ME* option in the Settings Window.
- Your computer will open a web browser window and navigate to power.me/gtd/support.
- In the Email Our Team portion of the webpage, enter your name, email address, topic of your question or comment, a subject line, and your message. Then fill out the validation question (it's a simple math problem to ensure the emails we receive are from customers instead of computers).
- Click the *Send Message* button at the bottom of the Email Our Team field.

Showing Power.ME Help

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

- To access the Help features, click the *Show Power.ME Help* option in the Settings window.
- Your computer 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, click on the *Web* version.
- Click on the problem topic and read through the available help.
- If the user guide can't help you with the issue, either click the *Send feedback to Power.ME* option in your Power.ME settings or click the *Support* option from the menu bar at the top of the Power.ME 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 clicking on the Live Help panel on the right side of the screen. (NOTE: Support is available Monday through Friday, 8:00 AM to 5:00 PM Mountain Standard Time.)

Changing Your Password

- Should you ever want to change your password, scroll to the bottom of the Settings window.
- Click the *Change Password* option.
- Type your old password in the first line.
- Type your new password in the second line.
- Retype your new password in the third line.
- Click *Submit* (in the lower right corner of the Change Password window).
- Either continue adjusting your settings or click *Save* (in the lower right corner of the Settings window).

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 appear in your Power.ME.

- To add an alternate email account, scroll to the bottom of the Settings window.
- Click the *Add Alternate Emails to My Account* option.
- Your computer will open a web browser window and navigate to a webpage where you can add email accounts.
- Click the *Email 2* field.

- Type in your alternate email.
- Click *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.

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