

Accomplice™ Sharing: What and How

Accomplice lets you easily share and coordinate activities and notes with others – so your Accomplice talks to “their” Accomplices. You can delegate activities to other people, work with co-contributors towards a team goal, and stay informed on all the things you need to know even as things change.

Accomplice Sharing

When you share an activity, a copy of your activity is sent across the internet to all the people you have designated as your Team. Changes you make later to your shared activities and notes will automatically propagate to the people on your team. The outline structure of shared activities is also retained across a team, unless recipients choose to re-organize pieces for themselves.

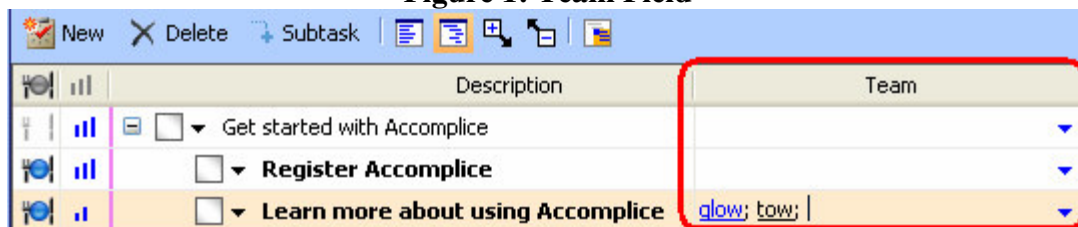
When participants accept your sharing request their Accomplice will create an identical copy of your activity. These are their versions of the activity, and they can edit them exactly as they would activities of their own. However, because the activity they have accepted from you is shared, any changes that they make to common fields (Status, Due Date, Importance, Description) will be propagated to everyone else. So if one of your teammates marks his/her version of the shared activity as “complete,” everyone sharing that activity will see the activity is now “complete.” Fields whose values are design to be unique to each user (On My Plate, Category, Progress) are retained for each respective user. In this way, Accomplice sharing has three major benefits:

- A. Accomplice keeps you and your team members on the same page for all the activities you are sharing; and
- B. Accomplice allows you to see who is working on what, with what ownership roles.
- C. You can still keep some personal attributes on shared activities, such as what you consider to be on *your* plate.

How to Share Activities

1. Click to select the activity you wish to share.
2. Click on the “Team” field. (See Figure 1)

Figure 1: Team Field



3. Invite people.
Type in the names of all the people you would like to share this activity with. For people already included in your Accomplice Contacts, Accomplice will recognize first names, last names, aliases, and email addresses, so you can begin typing any of these 4 terms and

the Accomplice Contacts that match your keystrokes will be listed. If you want to share your activity with someone who is *not* a registered Accomplice user, type their email address into this field. You will then be asked if you would like to invite them use Accomplice. If you say “yes,” they will receive an email from us inviting them on your behalf to download use Accomplice for free - no IT support required. And your shared activities will be waiting for them on Accomplice’s secure server for when they register.




4. Once you have typed the names of all the people you would like on your team, hit <enter>. Your activity is now shared!

If you are online and fully registered (you’ll see a green circle in the bottom right corner of Accomplice if you are) your shared content will synchronize securely across the internet. If you are offline, you should see an up arrow next to a yellow or red circle indicating you have information to send out. (Hold your mouse above the colored circle if it is not green to get instructions on what to you.) The next time you are online, your shared content will automatically synchronize.

How to Share Notes

It’s easy to communicate with your team and stay on top of shared activities using shared notes. Shared notes can act as running conversations, forums to discuss relevant issues, spaces to provide details -- basically anything you want them to be. The flexibility of the notes allows you to interact with your teammates however it is easiest and most effective for you. Figure 2 illustrates a sequence of shared notes.

Figure 2: Shared Notes

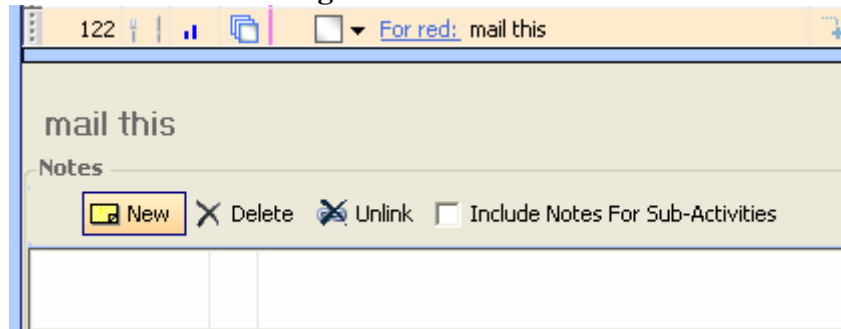
4/13/2006 red		great. I'll get in touch with Jim and let him know exactly what it is we need
4/13/2006 green		called her Tuesday, she needs to talk to Jim about venue particulars before we can move forward.
4/13/2006 red		Julia's cell: 555-1234

In order to share notes with your teammates, make sure your notes are marked as *public*, and are linked to activities that are being shared. Then, all the people on your team for those specific activities will be able to read the linked notes. Here’s how to do it:

Creating Linked Shared Notes (aka Public Notes)

1. Select the activity for which you wish to write a note
2. Create a new note: Click the “new” button in the Notes pane toolbar near the bottom of your screen (see Figure 3), and type your note. (The new note shortcut is <Control> + K.)

Figure 3: Notes Pane




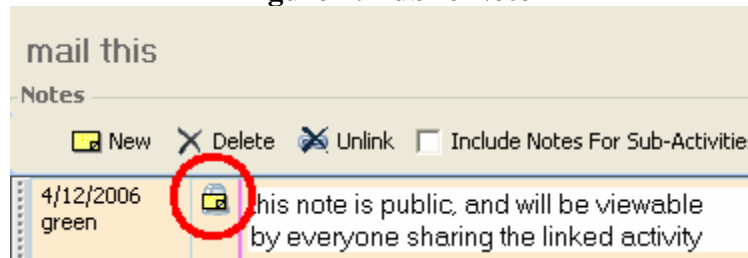
3. By default, all your new notes are Shared  (highlighted in Figure 4) automatically. However, you can toggle notes to Private or back to Shared by clicking on that icon, and you can also create a private note from an activity by right-clicking on the activity and selecting “Create a Private Note”. (You can also set your preference to make all new notes Private by default by going to Tools > Preferences > Notes.)
Shared notes

Figure 4: Public Note



4. As with Activities, your Shared Notes need to be *synced* out to all the people participating on the shared activity, and this happens automatically – about every 15 seconds or so – when you are online. Once your note has been sent, everyone sharing the associated activity will receive a copy of the note, linked to its activity(ies). Anyone sharing the activity can also, in turn, add their own public notes and share them with you and other members of the team. If you make any changes to the content of your shared note, your team members will see those changes. Shared notes from each team member will be linked to the shared activity and displayed chronologically.

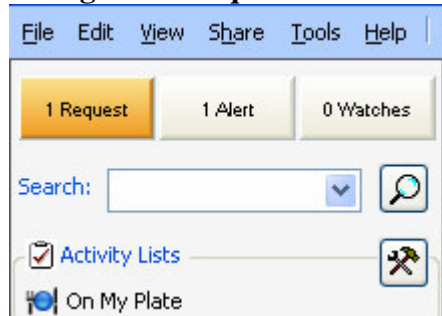
Please note: Only the text box portion of Notes (ie. not the file, email, and web links that are attached to notes, below the regular text box area) are shared with other participants as of Accomplice version 1.2.1.

Receiving a shared activity

When someone invites you to participate on a shared activity, you will receive a request to accept the activity. The process runs like this:

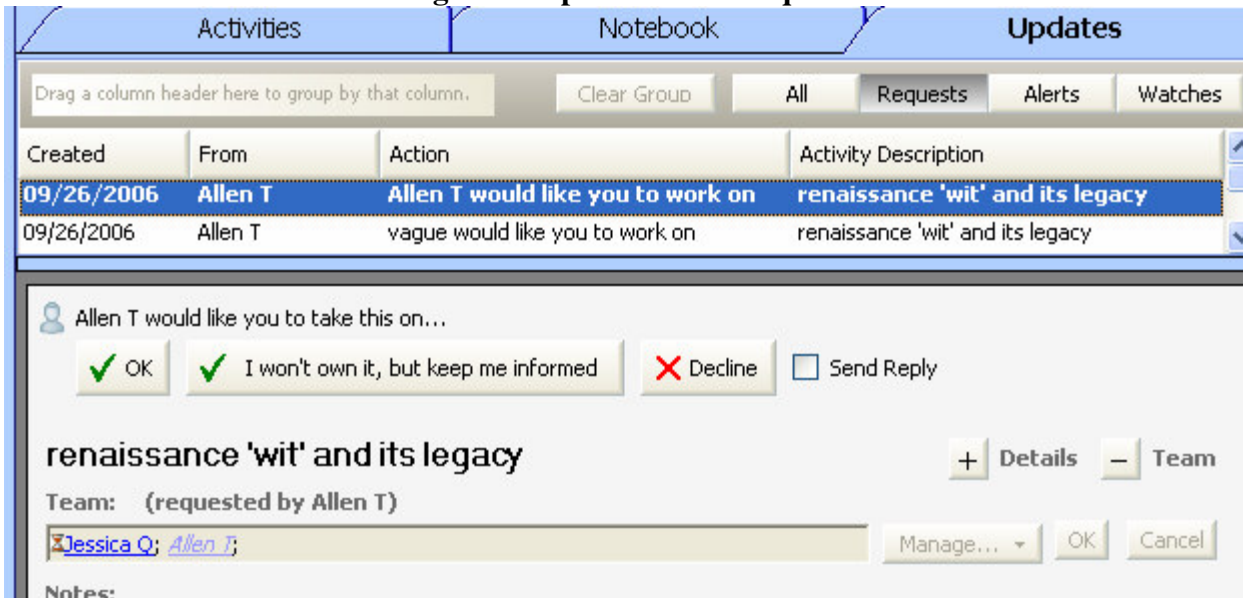
1. Your Accomplice software will automatically *sync* and receive a sharing “request.” (For more on “syncing” see “The Details” section below). Whenever you receive a new request, the “Request” button in the Accomplice dashboard will blink and will indicate the number of requests that you have not yet responded to.

Figure 5: Requests Button



2. Click on the flashing “Requests” button and your Accomplice will navigate you to the Updates tab, where you will see your unread requests in bold font, as well as recently responded-to requests, if any. (For more on Updates, see “The Details” below).
3. Click on any unread Request, and notice that three acceptance choices appear below in the Activity Details Panel, as highlighted in Figure 6.

Figure 6: Updates: New Request



4. You can click “OK” to accept the request and work on the activity that has been shared with you. You can click “I won’t own it, but keep me informed,” which means that you do not intend to take the lead on the activity, but you would like to keep a copy of it so that you can stay informed as to its progress. Finally, you can “Decline” the request.

Declining will remove you from that Activity's participant list and remove the activity from your Accomplice system.

5. Once you have accepted the request, you can view it in your own Activity Outline by clicking on the activity's name in the Activity Details Panel, circled in Figure 7.

Figure 7: Activity Details Panel



6. And that's it!

The Details

Syncing

In order for sharing to take place, you must have an active internet connection and your Accomplice software must establish a connection to the secure Accomplice hosting server in order to send and receive updates, or *sync*. This does not mean that the people you share with have to be on-line simultaneously. Accomplice's secure store-and-forward server allows you to work whenever you want, online or offline. You can see whether or not your Accomplice has been able to connect with our server by noting the color of the small circle in the bottom right corner of the application. If it's green, you're good to go. If not, hold your mouse over it to display a help bubble describing the issue. You may want to check your internet connection, and/or firewall settings. (If you are experiencing trouble connecting, please let us know by sending an email to support@accomplice.com so that we can resolve the issue as quickly as possible.)

While you are on-line, Accomplice's default setting is to automatically sync whenever messages are either A) waiting to be sent out or B) waiting to be received.

Updates Tab

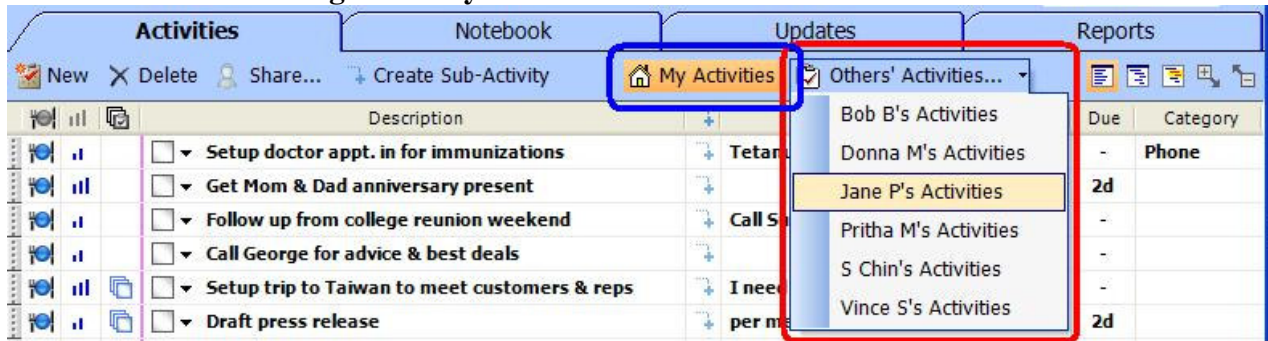
The Updates tab is designed to give you a concise view of the most important changes that have been made to all the activities you are currently sharing. So if someone adds a new note to an activity that you are working on, you will receive an Alert. Just click on the Alerts button (see Figure 5 above) in the Dashboard and Accomplice will navigate you to the Updates page where you can quickly find and read your new note. Or if you are already in the Updates tab, click the Alerts button to show only your recent alerts.

In the Updates tab you can cycle between Requests, Alerts, Watches, and All by clicking on any of the buttons there. For more information on the Updates, see the Accomplice Help (press the <F1> key in Accomplice, or go to Help > Contents).

What are others up to?

In addition to seeing changes across a team, Accomplice lets you see what anyone else on your team is currently up to, whether you are online or offline. To see what Jane P is up to on activities she has shared with you, click on “Others’ Activities...” within the Activities pane and select Jane P’s Activities. This is highlighted in red in Figure 8. Of course, your private stuff is *your* private stuff. So you can only see what you have invited Jane to participate on or what Jane has chosen to share with you. Accomplice will display what is “On her Plate”, what her priorities are, etc. and you can hopefully avoid a lot of phone tag and confusion. To go back to viewing your activities, click back to “My Activities” (highlighted in blue).

Figure 8: My Activities versus Others’ Activities



Security

Sharing information through Accomplice is much more secure than sending email because Accomplice uses SSL encryption in its communication. Accomplice uses the same trusted protocol, https, used by secure browsers for things like your online brokerage account. Comparing Accomplice to email is analogous to comparing certified mail to a postcard.

What’s an Owner?

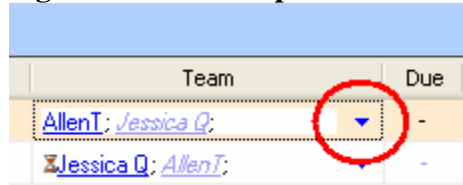
When you are sharing an activity, you may want to designate one or more of your teammates as "Owners." The Owner is the person or persons you expect to be take specific action on or lead the activity. This could mean that you expect this person to actually complete the activity, or that you would like everyone else on the team to go to this person for instruction on how best to complete it.

The Owner of any given activity is distinguished in the Team field by regular font, while regular team members are displayed in soft italics. Owners are also displayed first in the team

field, so as you glance down your list of shared activities, you can immediately see who owns each of them.

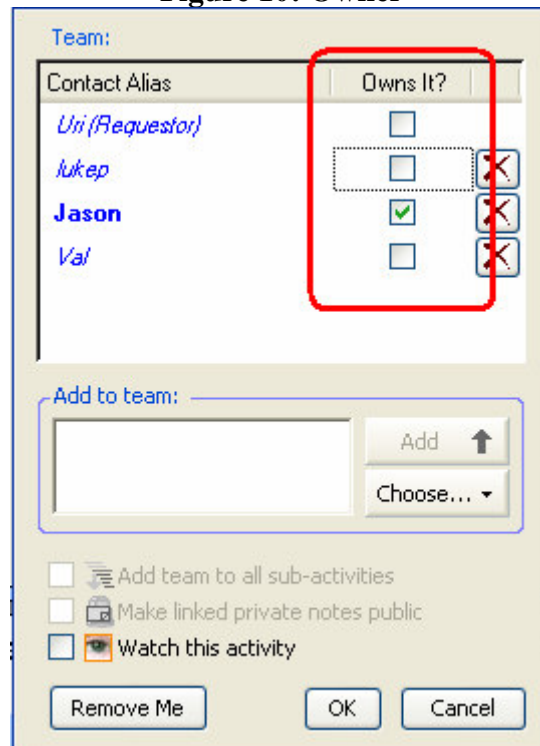
To make a teammate the owner of an activity, click on the down arrow in the Team field to open up the Team edit box (as in Figure 9).

Figure 9: Team drop down button



The top portion of this window (See Figure 10) will show you the current team. Just click on the checkbox next to the teammate you would like to make the owner. If you'd like to take the activity on yourself, you can make yourself the owner.

Figure 10: Owner



For an in-depth explanation of these features, please see Accomplice Help by pressing the <F1> key in Accomplice.

If you have any questions or have any feedback, please contact Accomplice at support@accomplice.com. Thanks for using Accomplice, and enjoy!