

Getting Traction

How to Get Started Using Traction® Software

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245 Waterman Street Suite 309
Providence RI 02906
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Getting Started with Traction

This brief guide shows you how to start using Traction for common tasks.

What can I do with Traction?

Traction is an enterprise web logging system that lets you collect, organize, and share working communication. Traction lets you easily log email messages as well as clippings from the web, Microsoft Office, and any other text, HTML, image, or binary data.

Each message logged to Traction becomes the newest and appears at the top of the list of messages. Important messages can be labeled "headline" or "news" by the person logging them, or anyone else subsequently who has permission to do so; these messages are featured on the Traction front page, which is like the front page of a news web site.

Each message is logged to a particular "project" within Traction, and users can have different levels of permissions (e.g. read, write, edit, admin) for each project.

You can filter Traction views by time (e.g. just show my things that happened last week), by label (e.g. just headlines, or just things your group labeled "To Do" or "FAQ"), and by search hit (e.g. just those messages containing the phrase "Acrobat Viewer").

Traction then lets you work with the accumulated information in a number of ways. With one click, you can track any paragraph in any article as a "To Do"; you can collect several articles and print them or email them to a co-worker; and you can add in-line commentary to any paragraph or entry.

Traction can also be configured to automatically mail you an email summary or "digest" of the entries logged. You can choose how frequently you wish to receive the digest. This lets you rapidly scan for interesting activity without cluttering your mailbox with each individual message.

How is information organized in Traction?

Traction uses a newspaper metaphor to make information accessible by time, topic and importance, and refers to individual entries as *articles*. Traction organizes articles using *projects*, *labels*, and *time*. Articles and labels belong to projects.

Projects can be subject based (Competition), project based (BigCustomer or ProductAlpha), or named for the person who owns that project (to create a personal workspace). Each project has its own set of permissions for read and write access.

Labels can be applied to a whole article, or any paragraph within an article for descriptive (pricing, competition, humour), action oriented (ToDo, Done, Release2, Release3), or priority tracking (News, Headlines, P1, P2) purposes. Think of Traction labels like the tape flag labels you can stick to any paragraph in a paper document to flag key items for information or action. Labels can also be used to make an article in one project visible to a new group of users by applying a label from a different project.

For example, if an Article is in a project named "Private," applying a "Headline" label from the "Public" project would make it visible to persons who are allowed to read articles in the "Public" project, in addition to people who are allowed to read articles in the "Private" project (this applies to search hits as well as what is visible from the Traction newspaper views).

The last important note about Traction's structure is that of time. Traction views are based on a period of time – such as a week, month, or year – that you can select, jump to, or flip through, like the editions of a monthly magazine. You can also choose a view of all time. By default, content searches look across all time, but you can narrow your focus using the Advanced Search form.

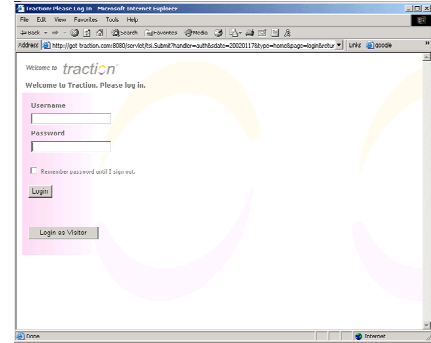
How do I log in for the first time and set my password?

When your Traction account is created, you will be provided with a URL, a username, and, optionally, an initial password.

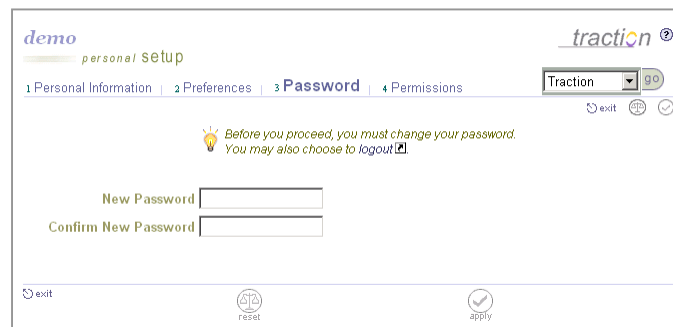
Enter your username and password into the fields and click the "Login" button. The fields are not case-sensitive. If you have not been given a password, leave the password field blank.

The "Remember my name until I sign out" box can be clicked if desired.

If you do not have a username and password, you may click "Login as Visitor" if the option is present.



Once you log on, you may be required to choose a password. If you see this screen, type your new password in each field and press the apply button in the lower right. This will take you into Traction.



Navigating

Traction has two primary skins that you can choose from.

The default skin, called the *news* skin, is based on a typical web newspaper. It is ideal for casual readers and people who just want to read what's going on, add comments, and do simple searches.

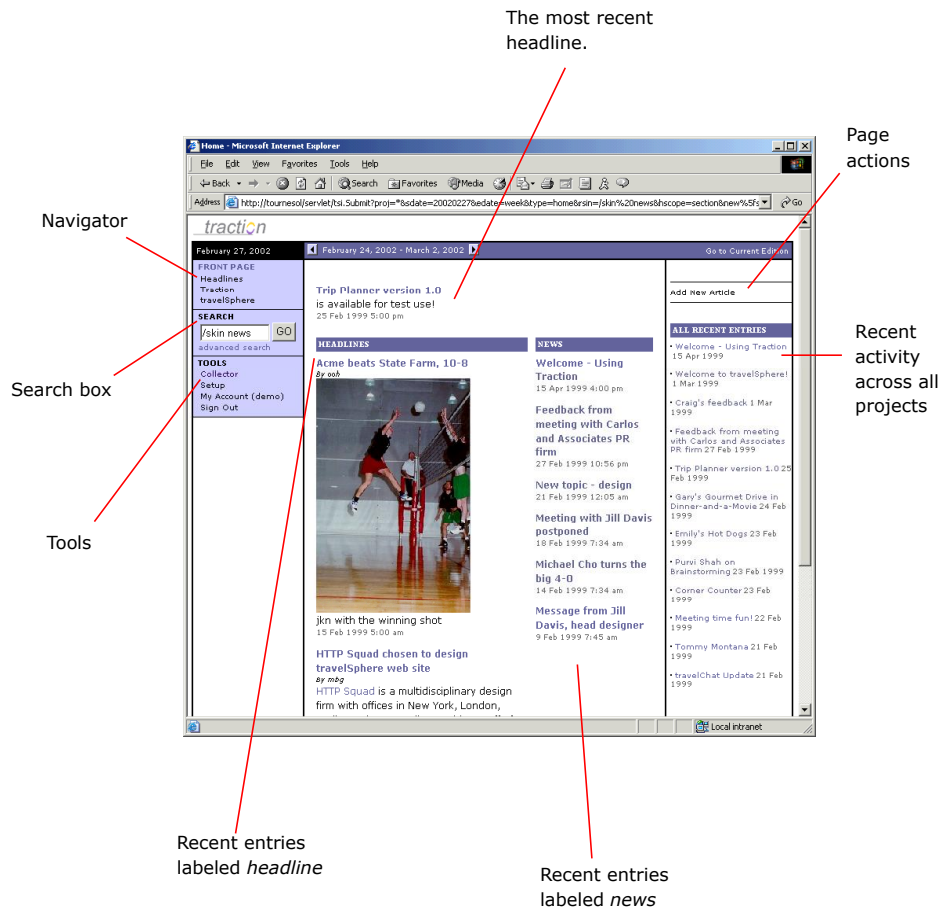
The other skin, called the *modern* skin, has more powerful display features for showing fine-grain detail; it is useful for people who use Traction for action tracking and advanced searching.

Getting around using the Traction "news" skin

The news skin consists of five primary pages: the *front page*, the *project news page*, the *single entry view*, the *multi-entry view*, and the *search result view*.

The Front Page.

The Front Page summarizes the most recent Headlines and News from all your projects. It also provides a "Recent Entries" ticker which alerts you to the most recent additions to all your projects, regardless of importance.



The **navigator** is present in all pages in the news skin. It lets you jump quickly to the Front Page, or to any project news page.

The **search box** lets you type a search or a *Rapid Selector* command. *Rapid Selector* commands let you jump instantly to any page in Traction with a few keystrokes.

The **tools** menu lists the tools you can access, e.g. account settings, the collector.

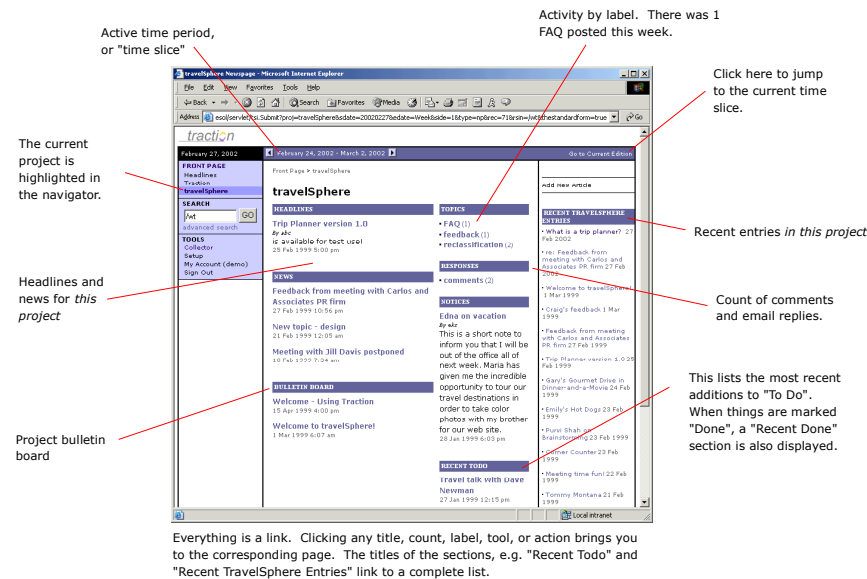
The **actions** menu lists the actions available on this page. The front page just lets you log a new entry.

The **recent entries** sidebar lists the most recent entries posted to Traction, with the latest entry on top.

The most recent headline appears at the top of the page; other headline appear in the center left column, while news articles appear in the center right column. The minimum and maximum number of entries to show in each section and many other controls can be customized in your account settings.

Project Newspaper

The Project Newspaper allows you to drill down into activity solely relating to a specific project or topic. Like the Front Page, it gives you Headlines and News, but it also shows a list of Topic labels that have activity in the time period, To Do and Done actions, Notices, and a Bulletin Board.



While the contents of most sections will change depending on the time period you are focused on, the **bulletin board** of every newspaper shows *all* of the articles labeled "bulletin" in the project. By labeling an introduction or important document "bulletin", you can insure that it will always appear on the project newspaper.

Single entry view

This view shows one article in Traction. In the sidebar it also provides context by listing labels applied to this article, articles referencing or referenced by this article, and emails sent from Traction with this article attached.

The locator tells you where you are. Click higher levels to back up to the news page or front page.

Comments are shown underneath the paragraph they apply to.

Actions available for this entry

Same entry after clicking the "hide comments" action.

Labels applied to this entry

List of other entries that reference this entry

Multi-entry view and Search results view


You get to the multi-entry view by clicking a label, section title, or type of cross-reference – anything that can lead to a list of entries. Generally just a small amount of information is displayed for each entry.

The search results view is similar to the multi-entry view, except that it only displays a few words of context around each search match.


How can I add a comment to something I see in Traction?

You can comment either on a specific paragraph, or on an entire article. In order to comment on an entire article, you can use the comment action in the single entry view of either the news or modern theme.

Traction also provides a "context menu" on every paragraph. Clicking the little menu icon at the end of each paragraph activates this menu.

I just had to post this email I received from Carlos of Carlos and Associates. In it, he really takes the time to offer us some honest feedback on our presentation of the future of travelSphere. Please read on. [news] 01 

When you hover your mouse over the menu icon, it expands to read "menu".

I just had to post this email I received from Carlos of Carlos and Associates. In it, he really takes the time to offer us some honest feedback on our presentation of the future of travelSphere. Please read on. [news] 01 

Clicking the menu icon displays the context menu for this paragraph. This context menu is shown with "Comment" selected.

In Internet Explorer, it is not necessary to click the menu icon. You can simply click on any paragraph with the right mouse button (right-click) to display the context menu.

Note that the context menu is divided into three sections: paragraph, article, and page. The actions listed under each section apply to the paragraph, the entire article, or all the articles on the page.


Add New Article
Printer-friendly version
Email to a friend
Collect Article
Edit Article
Add Comment
Reclassify Article
Hide Comments (3)

PAGE OPTIONS

 Print Version
 Send Page
 Collect Article

TOOLS

 Add New Article
 Collector
 Reclassify
 Edit Article
 Add Comment

I just had to post this email I received from Carlos of Carlos and Associates. In it, he really takes the time to offer us some honest feedback on our presentation of the future of travelSphere. Please read on. [news] 01 

I agree that the initial... was definitely not as... wasn't as minimalist a... webpage, though I di... the extent to which, or... than just a tool. [defin...

In fact, it goes... "helper"; it's an... completely unique...

I think that you need... and "why it is good" (... the idea) before you c... Ursula's slide show (v... them) these words hit me in the face -- and I don't know what they mean. They have no context for me. Of course I know what they

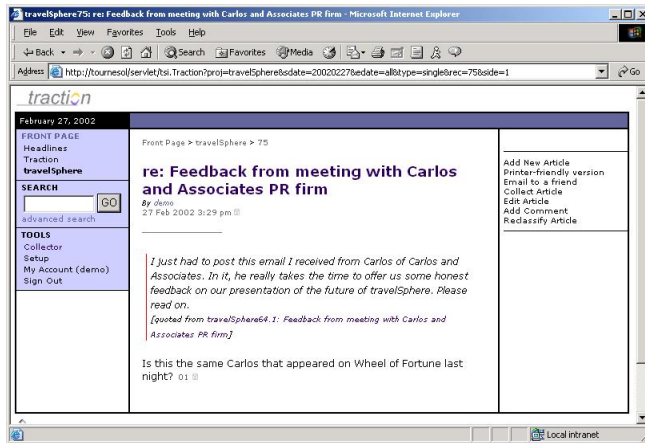
Regardless of which method you use to invoke it, the comments dialog appears in a separate window, where you can type your comment. The drop down list in the upper left of the comment box lets you log the comment to your choice of projects.

The default project is the same project as the article you are commenting on, but you may want to change the project choice in order to permission the comment to a specific group of users.

By default, there are no labels applied to comments. You may apply a label to a comment, if, for example, you want the comment to appear as News or a Headline item.

When you have finished, press "Submit" and the comment appears in the text.

If you click the underlined text, you can see that this comment is actually its own Traction entry. The red bar indicates the context in which the comment was made. You can click "quoted from" to return to the article containing the comment.

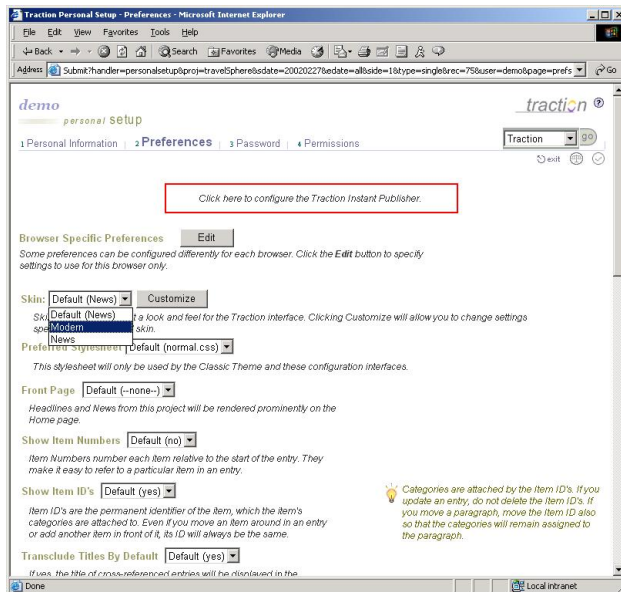
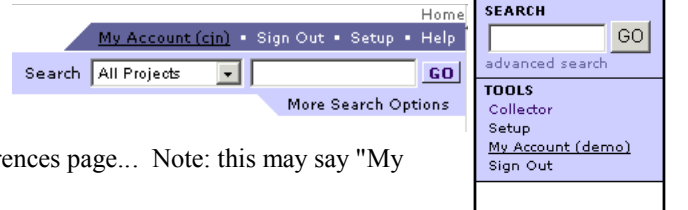


How can I change skins?

You can quickly change the skin selected by your web browser by typing “/skin modern” or “/skin news” in the Search box, or you can switch back to your login default skin by typing “/skin default”.

If you would like to change your login default skin, click the "My Account" link under “TOOLS” to go to your preferences page... Note: this may say "My Profile" in versions of Traction before 2.6.

This takes you to the preferences page. You can change your skin from the server default to your preference by choosing either News or Modern from the pull-down menu.



Once you change your preferences on this page, you must press the apply button at the bottom of the page to make your changes take effect. For your convenience, there is also a miniature apply button at the top right of the page.



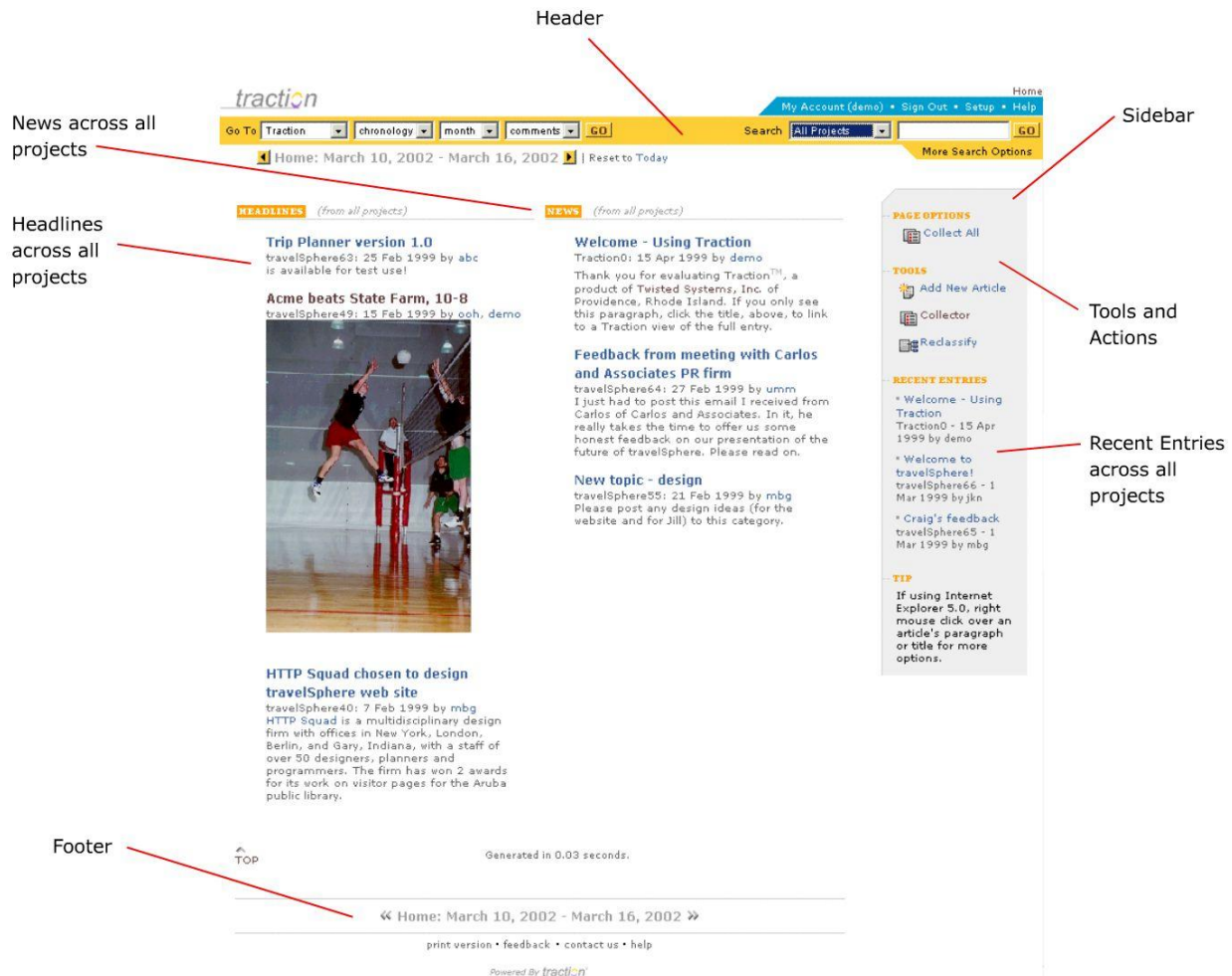
When you click exit to leave the settings page, you will be in the new skin.



Getting around using the Traction "Modern" skin

Front Page

The Modern skin's front page serves the same function as the News skin's front page, but it is laid out differently. The modern header includes a more compact navigator that works using pull-down menus, as well as additional search controls.



The **header** includes a navigator and search control, as well as other essential links. In the upper-right is a locator that tells you where you are.

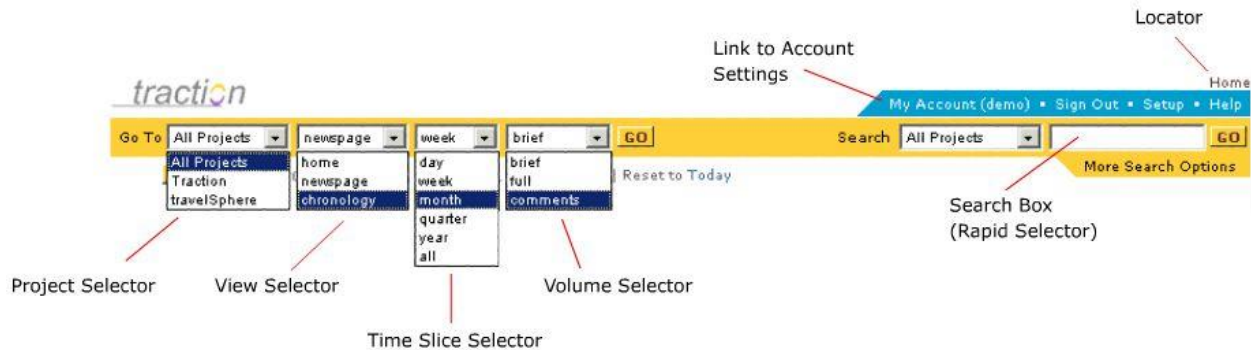
The **sidebar** contains tools and actions, as well as a **recent entries portlet** that lists the last several entries in the time slice.

The **footer** has links that let you move to the previous and next time slices without using the header.

The **headline** and **news** portlets report headline and news activity for the time period.

The navigator in the modern skin lets you quickly jump to any view. When a page is displayed, the navigators is set to the settings for that page. When you want to change pages, just dial in the settings you want and press "go".

First choose the project on the left. If you choose "all projects", the "newspage" option in the second pull-down goes away (since the front page itself is the "all projects newspaper").

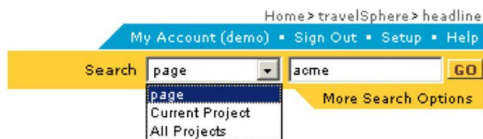


The **project selector** lets you choose from the projects you can read, or lets you choose "all projects".

The **view selector** lets you choose between the front page, project newspaper, or chronology. The chronology is a multi-entry view that lists all the entries in the time period with the most recent entry at the top.

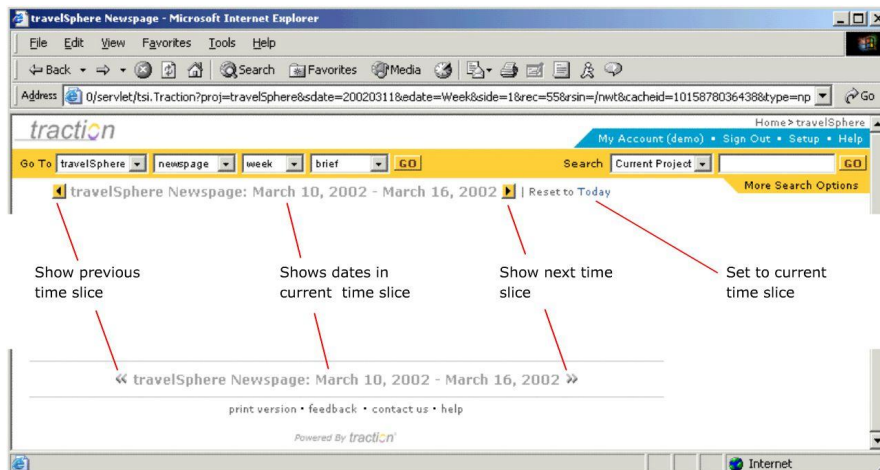
The **volume selector** lets you choose how much information to show in the target view. This setting only affects single and multi-entry views. "Brief" means to show only the most relevant paragraphs from the entry (i.e. those where a label is applied); "full" means to show all the paragraphs, but not any inline comments; "comments" means to show the full-content, with inline comments expanded.

The **locator** tells you where you are.



The search control lets you choose whether to search the current project or all projects. On single and multi-entry views, it also lets you choose to search the current page. This type of search acts as a filter, showing only the matching entries (or paragraphs in a brief view) on that page.

The next line in the header allows you to move forward and backward in time between time slices, as well as jumping to the current time. Most of the controls in the header are duplicated in the footer.



Project Newspaper

The screenshot displays the 'travelSphere Newspaper' interface within a Microsoft Internet Explorer browser window. The interface is organized into several sections:

- Header:** Includes navigation links like 'Go To', 'travelSphere', 'newspage', 'day', 'brief', and a search bar.
- HEADLINES (from this project):** A section titled 'New topic - design' with a timestamp 'travelSphere55 - 12:05 am by mbg' and a message: 'Please post any design ideas (for the website and for Jill) to this category.'
- NEWS (from this project):** A section containing two news items:
 - Meeting with Jill Davis postponed:** 'travelSphere52: 18 Feb 1999 by mbg. Jill had to fly out to California to help a friend in need late last night. We will reschedule the meeting when she returns. She apologizes for any inconvenience she might have caused us.'
 - Michael Cho turns the big 4-0:** 'travelSphere48: 14 Feb 1999 by mbg. Valentine birthday wishes to mecl'
- Message from Jill Davis, head designer:** 'travelSphere43: 9 Feb 1999 by rsh. Jill Davis writes: Hello team travelSphere!'
- BULLETIN BOARD:** A section with two entries:
 - Welcome - Using Traction:** 'Traction0 - 15 Apr 1999 by demo'
 - Welcome to travelSphere!:** 'travelSphere66 - 1 Mar 1999 by jkn'
- NOTICES:** A section with one entry:
 - Edna on vacation:** 'travelSphere31 - 28 Jan 1999 by eks'
- RIGHT SIDEBAR:**
 - PAGE OPTIONS:** Includes a 'Collect All' button.
 - TOOLS:** Includes 'Add New Article', 'Collector', and 'Reclassify'.
 - TOPICS:** A list of topics with counts: 'design (1)', 'finance (1)', 'goTraction (1)', 'headline (1)', 'recruiting (2)', and 'travelChat (1)'.
 - RECENT TRAVELSPHERE ENTRIES:** A list of recent entries:
 - 'Tommy Montana travelSphere57 - 9:34 pm by rsh'
 - 'travelChat Update travelSphere56 - 8:45 pm by djp'
 - 'New topic - design travelSphere55 - 12:05 am by mbg'

The newspaper shows headlines and news in the mail column. Like the news skin, it will also show "Recent To Do" and "Recent Done" side by side, if there are any matching entries.

The label activity is reported in the sidebar. Click any label to go to a "topic view" of that label.

Single Entry View

Locator

Page Options and Actions

Title and entry information

Inline comment

Expanded cross-references

Mail header

On this page

Cross reference summary

Todo label on a paragraph

Cross-reference details by type

travelSphere35: Is it a go? We need your opinions! - Microsoft Internet Explorer

File Edit View Favorites Tools Help

traction Home> travelSphere> 35

My Account (demo) Sign Out Setup Help

Go To travelSphere single week comments GO Search Current Project GO

travelSphere35: March 10, 2002 - March 16, 2002 | Reset to Today More Search Options

Is it a go? We need your opinions!

travelSphere35: 1 Feb 1999 5:34 am
Written by mec; Edited by demo; View edit history (1 edits)
13 Cross References; 1 Comment

Folks, the time has come when we must decide whether or not to go forward with developing software for travelSphere Industries. There are a lot of factors to take into account when making such a large decision. We'd like to hear your opinion regarding the following questions: (I've provided links to travelSphere entries that have thus far best reflected the opinions of our team members.) 01

Who will we hire to build the software?

travelSphere30: (hot shot) Programming interns -- jkn on interns
travelSphere34: Acme interns -- mbg on interns and professionals 02

I think I might know just the person, but she's currently working at TripPlanner. Maybe we can make her an offer... [demo - 3/11/02 - 3:40 pm] comments

How will we build the software?

travelSphere25: Trip planner information -- response to -- abc on Wizards
travelSphere26: Java -- abc on Java 03

Is it cost-effective?

travelSphere29: Upping our server power -- mec on server power 04

We're looking to hear more! Please post all entries to planner. 05

Eum nonummy pertineo quis odio esse iuriere at feugiat exerci qui antehabeo sed odio iusto nostrud te eu esse ullamcorper. Commoveo ut in tincidunt, diam abigo delenit pertineo quidem volutpat praesent suscipit nulla at dolor uxor ad, commodo ullamcorper. Illum ut ingenum adsum appellatio in ad augue aliquip. Consequat accumsan elit feugait nostrud vel, aliquip et facilisis te ullamcorper. Probo esse blandit immitto oppeto autem, in consequat. Vel ut dolor pertineo uxor delenit eum iuriere facilisis accumsan ut blandit appellatio ut facilisis. Esse duis minim, adipiscing appellatio feugait te hendrerit nostrud et in minim delenit. 06

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Luptatum consequat adipiscing ingenum uxor ea si iusto at duis te iuriere feugiat, enim, volutpat feugait praemitto eu, nonummy tation. Eros autem quidem blandit tincidunt ad nisl, in autem quis ad exputo, quia diam eu. 08

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From: mec
To: travelSphere
Date: 1 Feb 1999 10:34:34

11 paragraphs from 1 article in 0.04 seconds.

print version • feedback • contact us • help

Powered By traction

PAGE OPTIONS

Print Version
Send Page
Collect Article

TOOLS

Add New Article
Collector
Reclassify
Edit Article
Add Comment
Email Reply

ON THIS PAGE

* news (1)
* planner (1)
* todo (1)

CROSS REFERENCES

* comments (1)
* emails (1)
* reclassifies (4)
* references (6)
* updates (1)

EMAILED BY (1)

* Is it a go? We need your opinions!
travelSphere77 - 11 Mar 2002 by demo

REFERENCES (5)

* Acme interns
travelSphere34 - 31 Jan 1999 by mbg
* (hot shot) Programming interns
travelSphere30 - 27 Jan 1999 by jkn
* Upping our server power
travelSphere29 - 27 Jan 1999 by mec
* Java
travelSphere26 - 23 Jan 1999 by abc
* Trip planner information -- response to
travelSphere25 - 23 Jan 1999 by abc

REFERENCED BY (1)

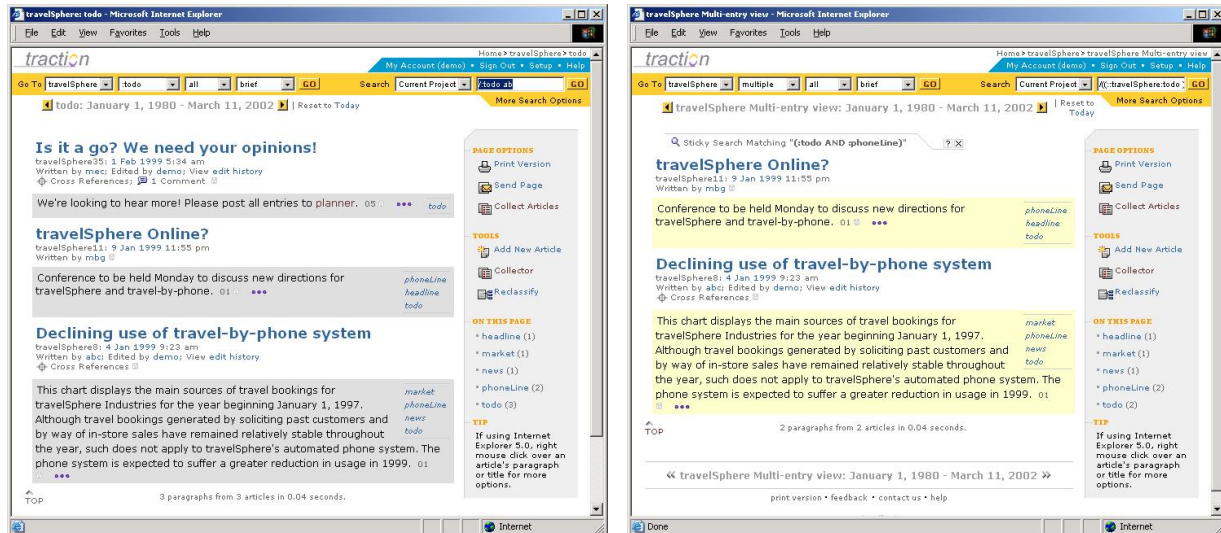
* Nice collection of references
travelSphere72 - 11 Mar 2002 by demo

TIP

If using Internet Explorer 5.0, right mouse click over an article's paragraph or title for more options.

Multi-Entry View

Below on the left is a multi-entry view of "todo". You can get to this view by clicking "todo" from the project newpage. In the right column of the page, you can see a list of Labels in the "on this page" section. The image on right is the view that results from clicking the "phoneLine" Label in the "on this page" section. This creates a new multi-entry view with just the entries that match both "todo" and "phoneLine", and then it highlights the matching paragraphs.



Topic View

The modern skin has a special type of multi-entry view called a "topic view". The listing of "todo" on the left above is an example. A topic view shows just the entries from the time slice with a specific label. A brief topic view shows only the paragraphs with the label.

You can get to a topic view by clicking a label name on the newpage, or by clicking on any label inside an entry. Doing so shows all the entries from the time period with that label.

Topic Added/Removed

In addition to a regular topic view, you can see a topic view that focuses on *changes* to labels during a time period. "Recent Todo" on the project newpage is an example of this. Clicking "Recent Todo" actually takes you to a view of "Todo Added" for the time period. Regardless of when the original entry was posted, if the label "Todo" was added to it during the time slice, it will show up in the "todo added" view for that time slice.

You can get to added or removed views using the *Rapid Selector*. The Rapid Selector is a command language which can be entered into the Search box in Traction. It provides the ability to do anything from quickly switching skins, to execute a complex query. To see the entries from which the headline label was removed during the current week, type `"/:headline removed"` in the search box. To see the entries that became bulletins, type `"/:bulletin added"`.

The `"/` indicates that you are typing a rapid selector command instead of a normal search. Colons preceding words indicate that the word is a label.

You can learn about the Rapid Selector by clicking the Traction Help link on any page, and choosing the Rapid Selector guide.

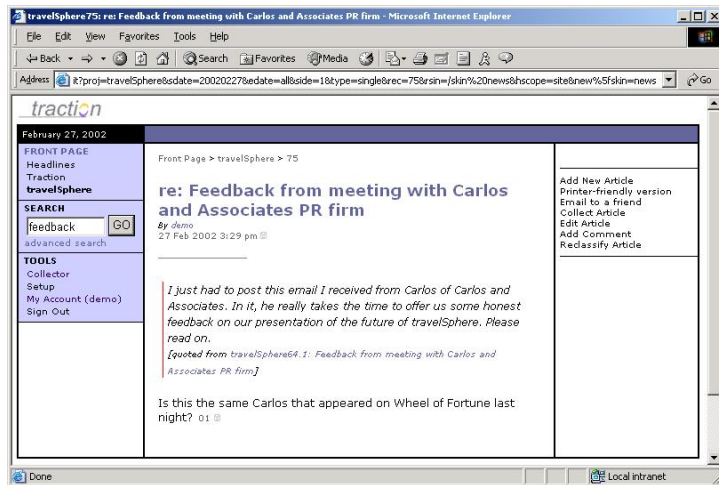
How do I search in Traction?

There are three ways to search in Traction.

1. *Basic Search*, from the Search box in Traction. This searches articles all projects for text you enter.
2. *Advanced Search*, available by clicking the link under the Search box in Traction. Searches for text by author, date range, project, and label.
3. *Traction Instant Publisher (TIP) search*.

This section explains simple searches. TIP searches are explained in the Instant Publisher section later in this document.

For basic searches, just type your search in the search box and press "Go" or type "Enter".

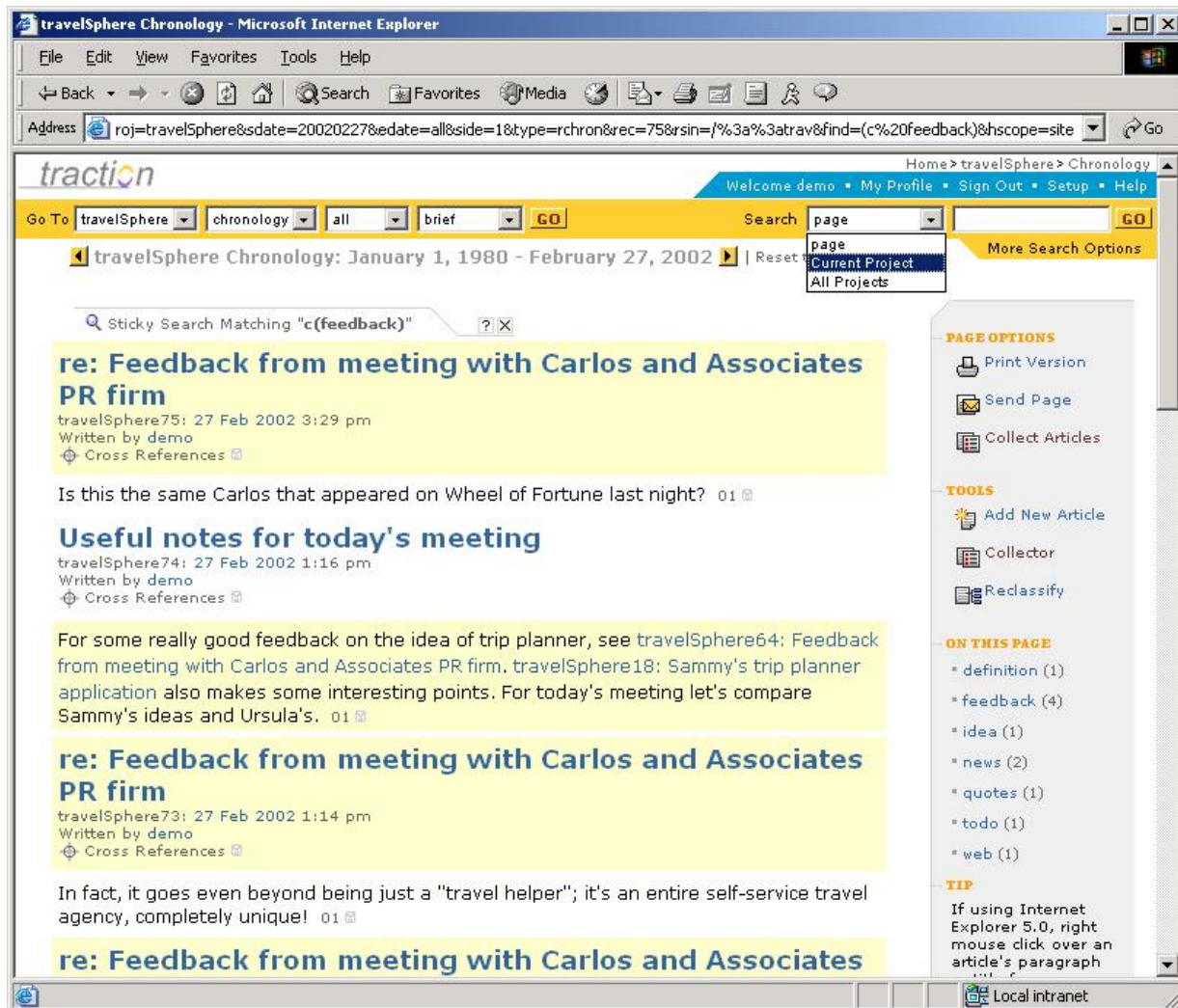


Search hits are displayed in a table, with word matches shown in **boldface**. If there are more hits than will display on the page, there is a link at the bottom of the page to show the next set of hits.

The screenshot shows a Microsoft Internet Explorer browser window titled "All Projects Search Results - Microsoft Internet Explorer". The address bar displays a URL with a search query. The page content is organized into three main sections:

- Left Sidebar:** Contains navigation links such as "FRONT PAGE", "Headlines", "Traction", "travelSphere", "SEARCH", "TOOLS", "Collector", "Setup", "My Account (demo)", and "Sign Out".
- Main Content Area:** Displays search results for the query "c(feedback)". The results are listed in a table-like format, with each entry including a title, a brief description, and a timestamp. The results are:
 - re: Feedback from meeting with Carlos ...** (27 Feb 2002 3:29 pm)
 - Useful notes for today's meeting** (27 Feb 2002 1:16 pm)
 - re: Feedback from meeting with Carlos ...** (27 Feb 2002 1:14 pm)
 - re: Feedback from meeting with Carlos ...** (27 Feb 2002 12:44 pm)
 - Welcome - Using Traction** (15 Apr 1999 4:00 pm)
 - Craig's feedback** (1 Mar 1999 5:20 am)
 - Feedback from meeting with Carlos ...** (27 Feb 1999 10:56 pm)
 - Website storyboarding progress** (27 Feb 1999 10:56 pm)
- Right Sidebar:** Contains links for "Add New Article", "Printer-friendly version", "Collect All Articles", and "ALL RECENT ENTRIES". The recent entries list includes:
 - re: Feedback from meeting with Carlos and Associates PR firm 27 Feb 2002
 - Useful notes for today's meeting 27 Feb 2002
 - re: Feedback from meeting with Carlos and Associates PR firm 27 Feb 2002
 - What is a trip planner? 27 Feb 2002
 - re: Feedback from meeting with Carlos and Associates PR firm 27 Feb 2002
 - Welcome - Using Traction 15 Apr 1999
 - Welcome to travelSphere! 1 Mar 1999
 - Craig's feedback 1 Mar 1999
 - Feedback from meeting with Carlos and Associates PR firm 27 Feb 1999
 - Trip Planner version 1.0 25 Feb 1999

The modern skin gives you some additional control over what you want to search. You can search the current page, the current project, or all projects.



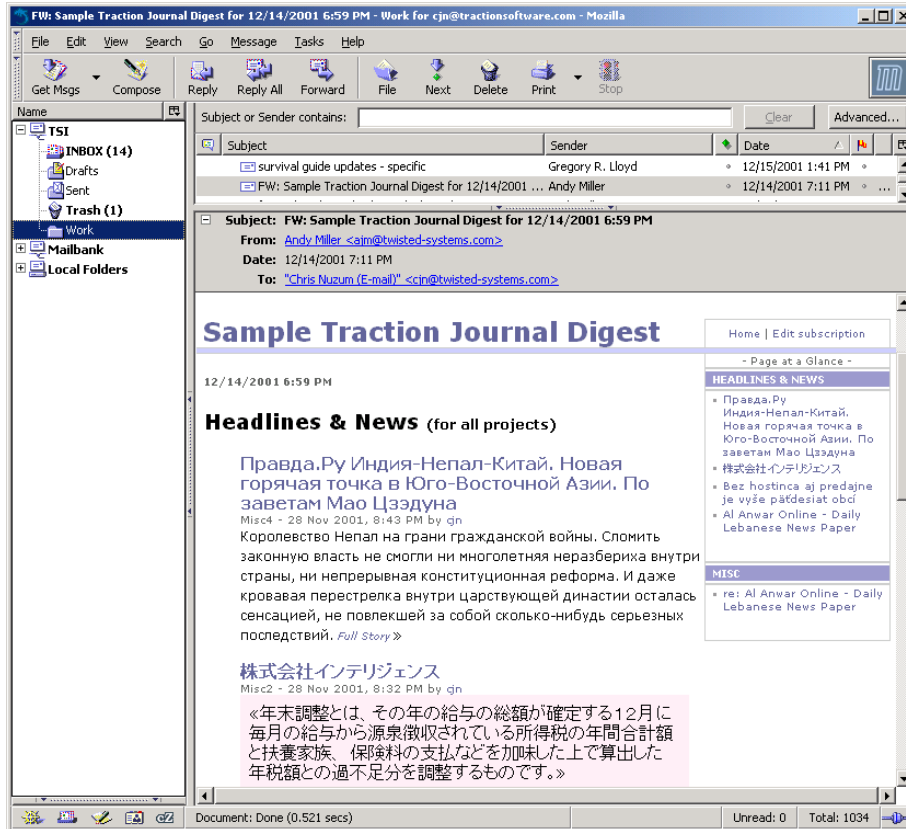
The modern skin also includes some "drill down" features. The "On this page" listing in the sidebar lets you click to focus on the paragraphs labeled with any of the labels that appeared in any of the articles on this page. You might do this to drill down to items labeled "To Do", then to those to do's labeled "web". You could then use the search box to search the page for only those web to do's containing "Go Live".

The Traction Instant Publisher also has a tree-based search interface (see below).

Traction Executive Summary Digest

How do I read the Traction Digest?

The Traction Digest is an email message that you can subscribe to on a regular basis – daily, weekly, every other day and twice on Friday – you choose. It summarizes the activity in Traction since your previous digest, up to a week back in time. The digest is available in both text and HTML formats.



The digest is split into two columns. The top of the right column contains links to your server's Front Page and to your preferences page (Edit subscription), where you can change your digest settings.

Underneath there is a "Page at a glance" section that lists the title of each message in the digest. Headlines and news items for all projects are listed first, then other entries by project. You can click the title in this section to jump to the corresponding article in the digest body.

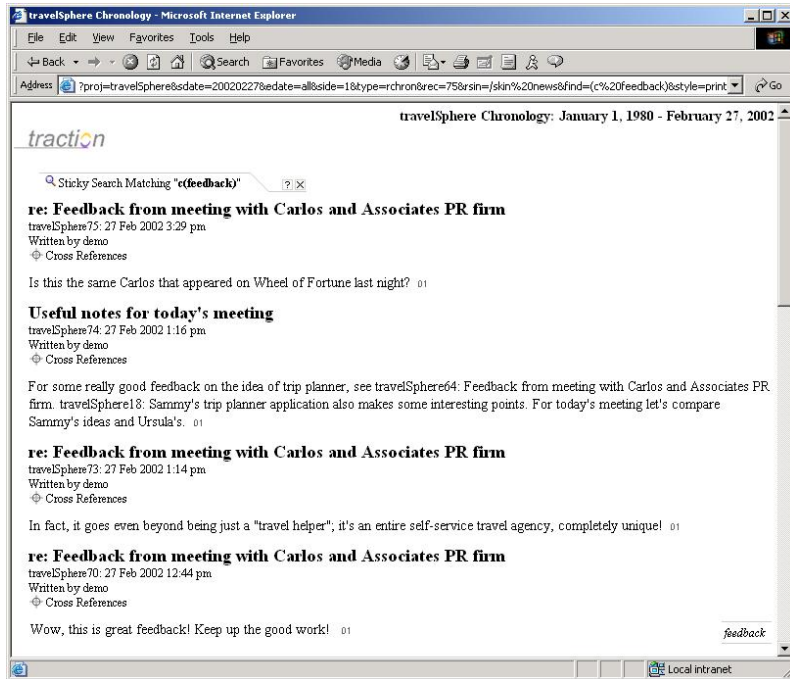
The main part of the digest lists the title and first paragraph of each article or comment that has been added to Traction since the last digest was sent. It is organized by project, but all articles labeled "Headline" or "News" is presented in a lead section. Clicking the title of an article will bring you to that article in Traction, where you can read the whole article, add comments, add labels, edit, print, or send the article to someone using email.

What is the best way to print Traction articles?

Traction includes a special print view. Click the "printer-friendly version" link in the news skin, or the "Print version" link in the modern skin.



These will take you to a special black and white print skin.

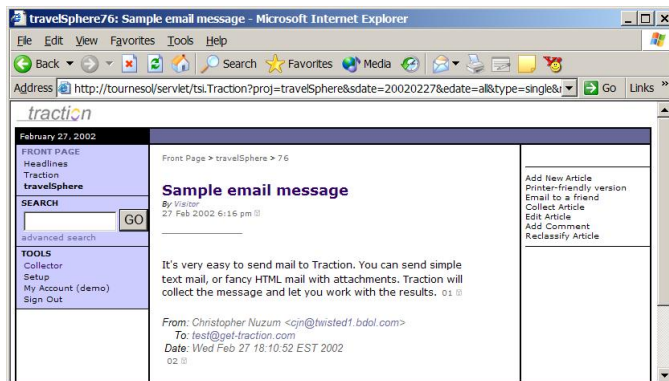


Publishing

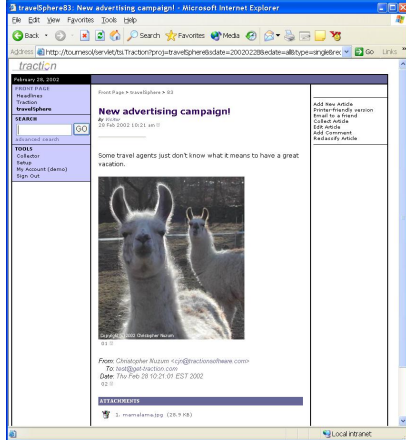
How can I contribute an email to Traction?

Every Traction project can be configured with an email address. Sending mail to that email address automatically logs the message in Traction. Check with your Traction administrator for the list of project email addresses.

Simple text example



Example with inline images



How can I send something I see in Traction to someone via email?

First, choose the email option for the skin you are using.

Add New Article
Printer-friendly version
Email to a friend
Collect Article
Edit Article
Add Comment
Reclassify Article

PAGE OPTIONS
Print Version
Send Page
Collect Article

Then, fill in the form:

Fill in header fields

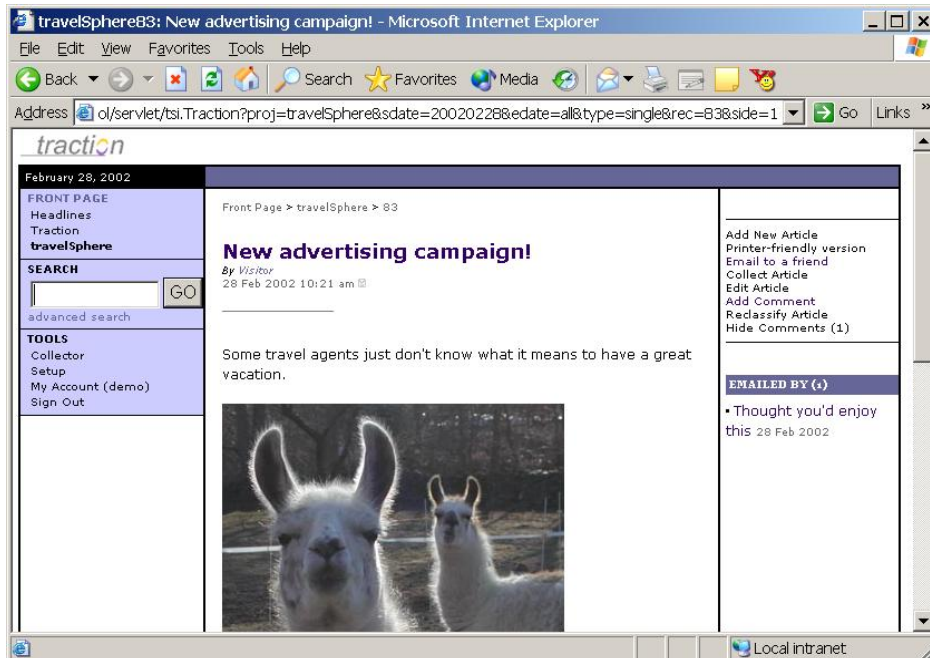
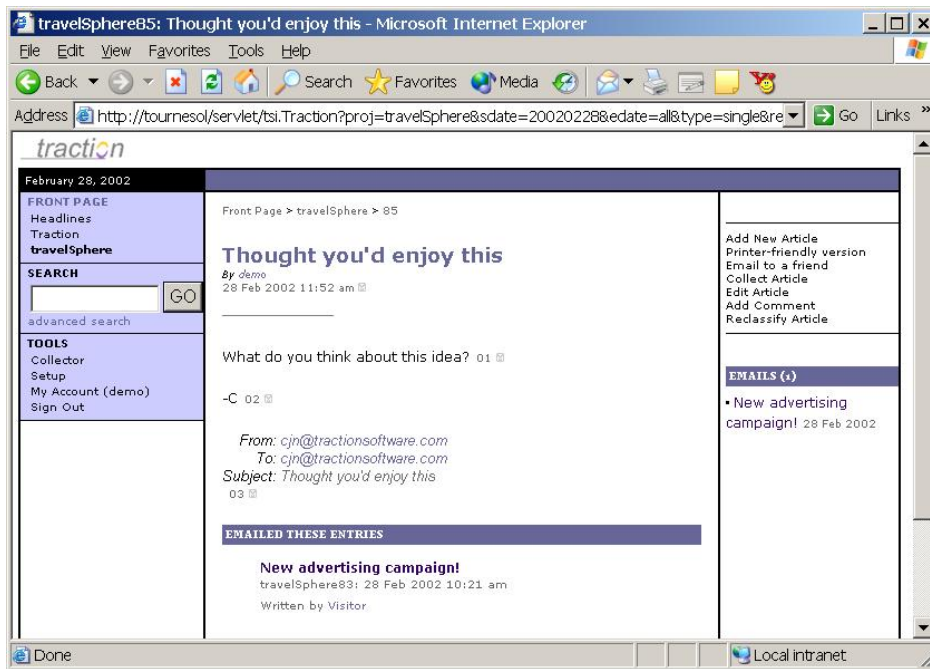
Type your message here

Choose format, whether to log to Traction, whether to include links to Traction, and whether to include comments

When you are done filling in the form, click the send button at the bottom, or the small send button at the top-right of the page:

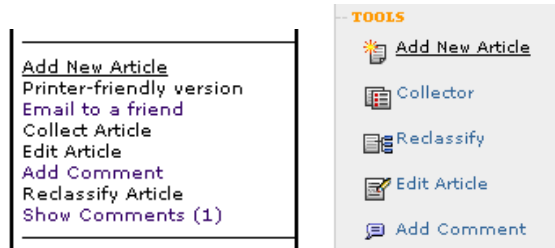


If you check the “log this entry to [project]” checkbox, your email will then appear as a Traction article which is cross-linked to the articles that it enclosed. Note that the original article shows that it was “emailed by” the new article.

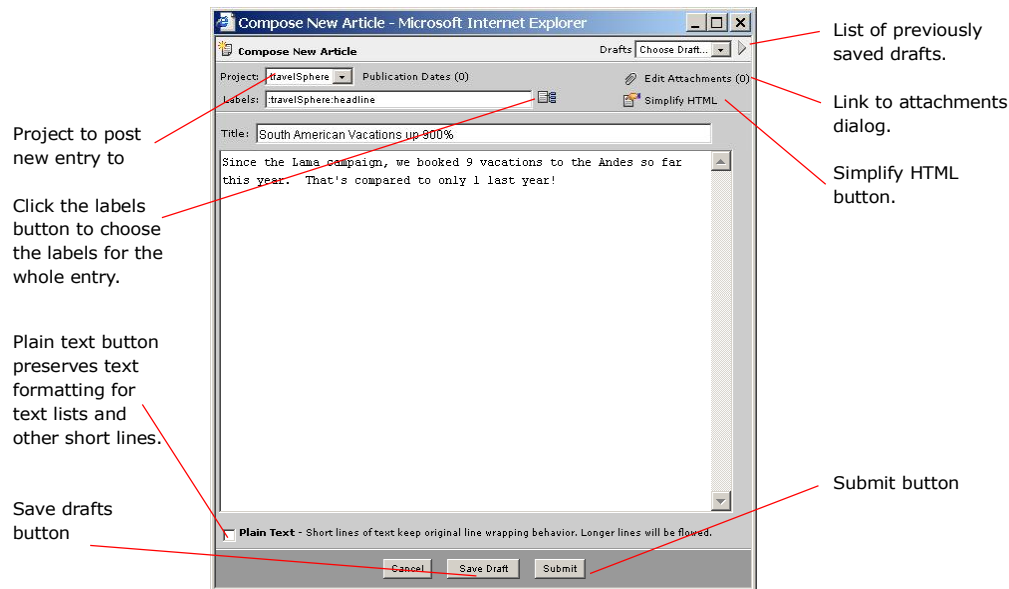


How do I add a new entry using the web interface?

Both the news and the modern skin share the same interface for adding new entries. To add a new entry, first choose the “add a new article” link from the skin you are using.



This pops up the compose form.



While you are working, you can save drafts of your work on the server by clicking the **Save Draft** button. The list of saved drafts appears in the drafts pull-down at the top of the screen. Choose an option from this pull-down and click the “go” arrow to the right. Drafts are removed when the article is finally posted as a new article.

How do I choose labels?

To choose labels for the new entry, click the labels icon. The label dialog appears. You can choose a label from any project. Choosing a label from another project will make the article visible to people with permission to read that project.

When you select a project, the list of labels for that project is displayed.

To add a label to this entry, select it from the list and click the “Add” button on the left. The list of labels for the entry appears on the right.

To remove a label from the entry, click the “Remove” button on the right.



How do I hyperlink Articles in Traction?

There are two ways to add a hyperlink, both are described below.

Method 1: From the edit window or add article window, simply type the project name and article number of the article to which you want to link (all one word, not separated by blanks). You can see this information at the top of any article in Traction. The article below would be hyperlinked simply by typing “Private50” into the text of an article you are editing. This also works when you are sending email to a Traction project. Just mention the article’s project name and article number in the incoming message, and it will automatically become a hyperlink when the message is logged.



Method 2: Make sure you can see both the edit/add article window and the browser where the target article is displayed. In the browser, mouse over the title, Left-click the title and drag it to this Edit window, then let go. The project name and article number will drop in.

This drag and drop method currently works only for Microsoft Internet Explorer on Windows platforms. Mozilla / Netscape support will be added when these browsers add the UI support necessary to implement this feature.

With either method, when you submit the article and view it in the browser, the full name of the article will show up as a link.

How do I jump quickly to any article?

Just type the Project name and article number (all one word, not separated by blanks) in the Search box and click *Go* or hit the enter key. For example, to jump quickly to article “Private50”, type Private50 in the Search box and click Go. This is very handy when you are talking on the phone with another team member – just say “See Private50” just as you might say “See Invoice 488” in an order entry system.

How do I add an attachment?

Click the “Edit attachments” link on the form. This pops up the attachments dialog. Click the browse button to choose the file to attach, and then click the “Add file” button. You can add as many attachments as you like this way. If you wish to remove an attachment, you can select the attachment on the right and click the “Remove” button.



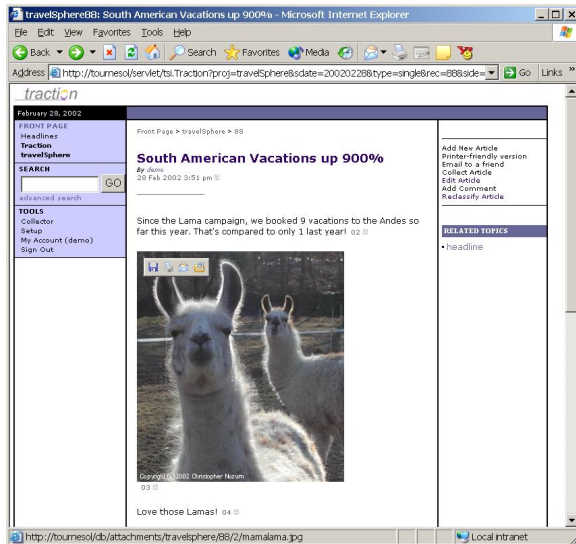
How do I show an attached image in the entry?

If the second file you attached is an image file, e.g. a jpeg, png, or gif, you can tell Traction to display it inline by including the following in the body of your article:

```
[[image 02]]
```

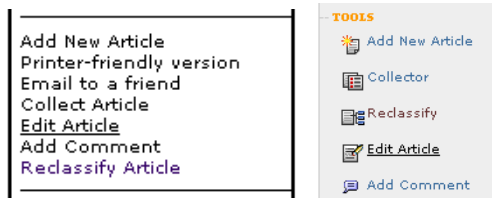
If you wish to add alt text for the image, you can type it in single quotes.

```
[[image 02 'Lamas at Dawn']]
```



Oops! How can I fix the article I just posted?

If you want to change an entry, click the “edit” button.



This pops up the edit form, which is the same as the compose form.

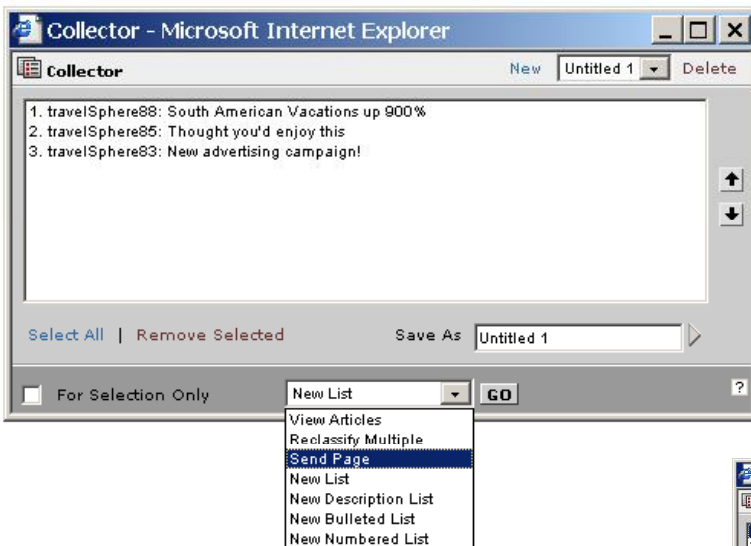
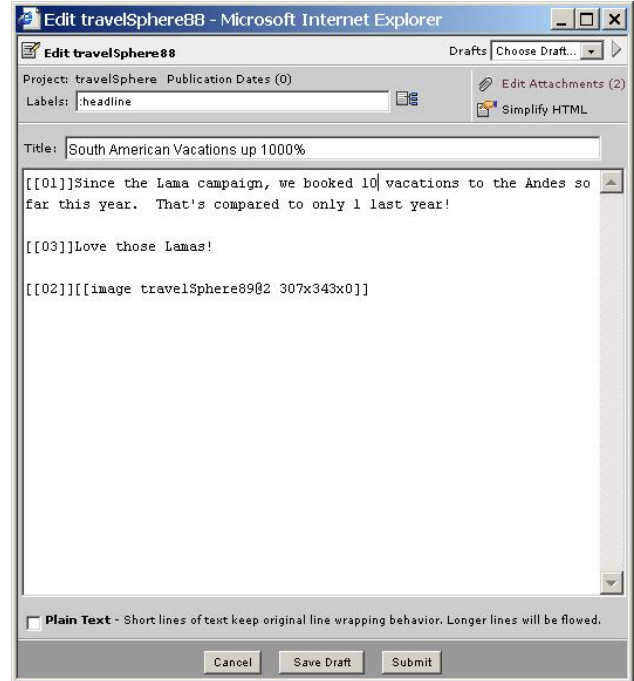
It is safe to change the order of paragraphs, but keep in mind that comments and labels are attached to the marker at the front of each paragraph, e.g. [[03]]. Be sure to move the marker with the text.

If you remove a marker, any comments or labels associated with it will no longer appear.

Collecting

How can I collect a bunch of articles and view them or send them to someone?

Traction includes a collector that lets you gather articles, order them, and then take certain actions on them. Actions include but are not limited to generating a PDF with all the collected articles and cross references, emailing the articles, viewing the articles together on one page, and generating a new article in an Edit window with hyperlinks to all the collected articles. The actions are available from the drop down menu as shown below.



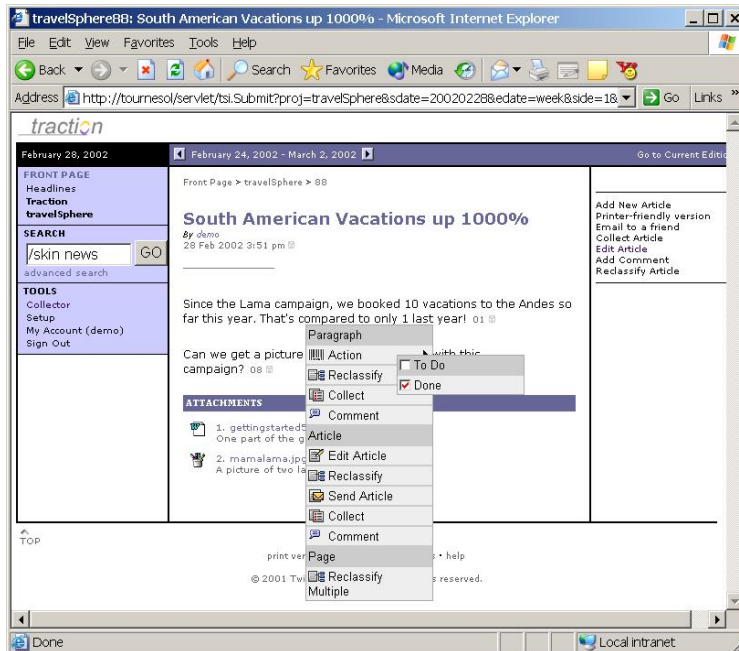
Using Internet Explorer, you can just drag the title of any Traction entry into the Collector. The Collector is available by clicking “Collector” under the “TOOLS” menu. Using other browsers, you can click the Context Menu next to any paragraph and choose the “Collect” option, or choose the Collect option from the page actions. Multi-entry views have a “collect all” option that lets you put all the articles on the page into the collector.

To reorder items in the collector, select the title of the entries you wish to move and use the up and down arrows to move them. As soon as you make a change, the arrow next to Save As turns red, meaning that you need to click it to save your changes before taking any action. You can save a number of collections under different names.

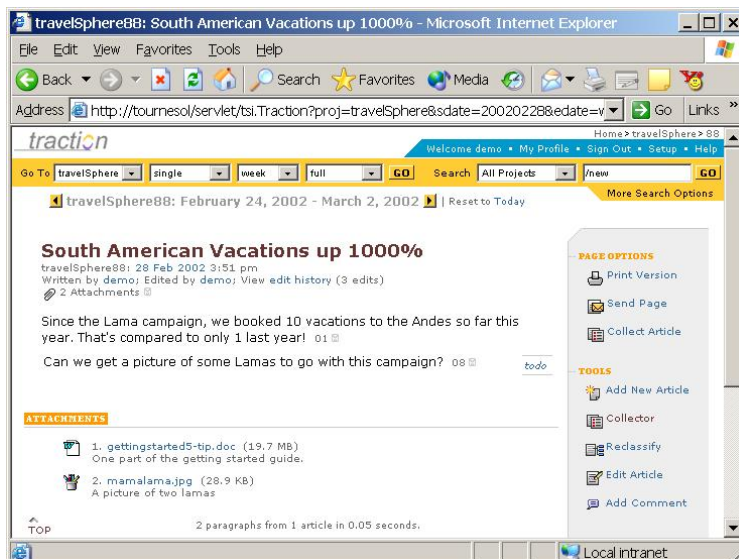
Tracking

How do I make a paragraph into a "To Do"?

On the context menu (accessed via the menu icon at the end of each paragraph, or via right-clicking on the paragraph), choose “Action” and then select “To Do”.

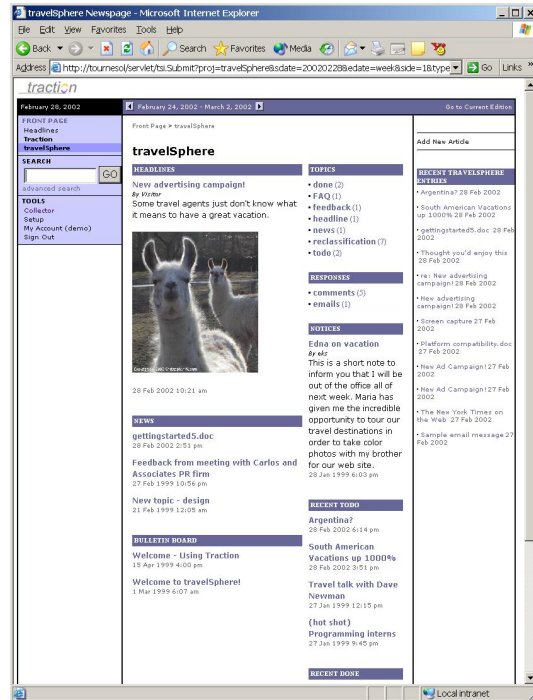


In both themes, this causes the “todo” label to appear next to the paragraph.

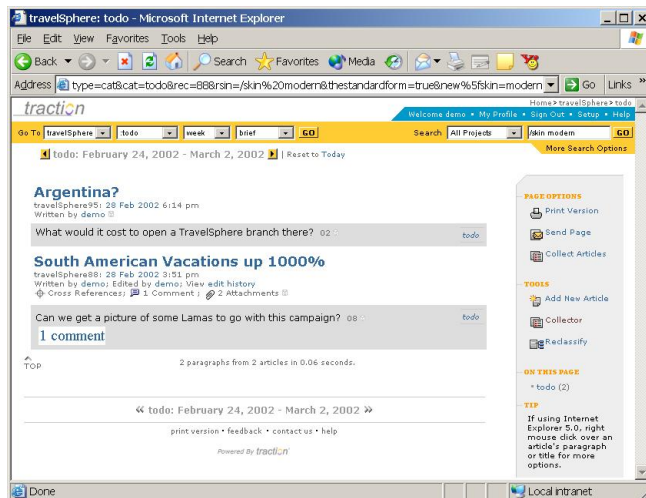


The entry also appears in the “Recent Todo” section of the project newspage.

You can add comments as a way of interacting on the action.



Click the “todo” label or the “recent todo” title on the newspage to view all the todos in the time period.



When you mark things done, they are added to the “recent done” section in the order in which they were completed.

How can I change the labels on a paragraph?

At any point, you can change the labels associated with an entry using the reclassify action in the context menu or the page actions area.

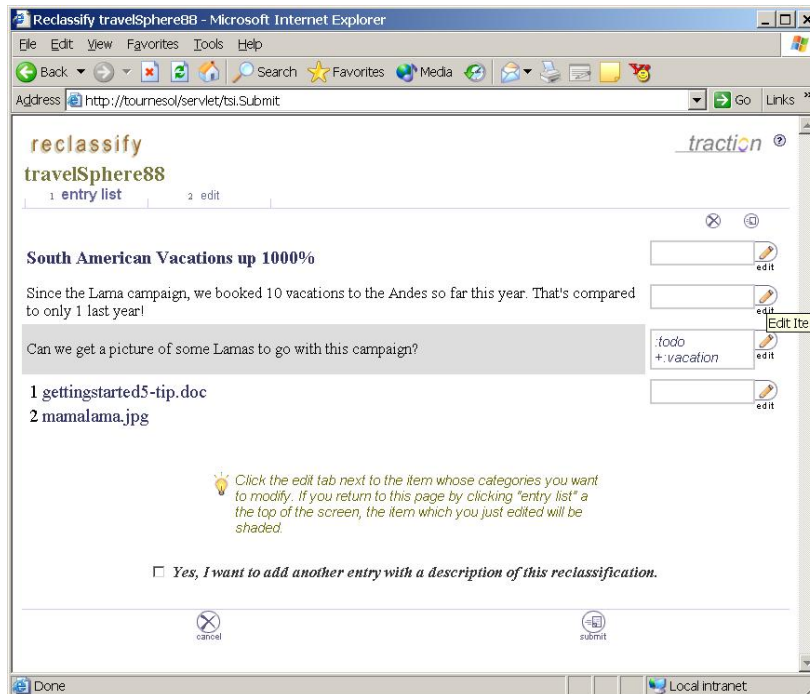
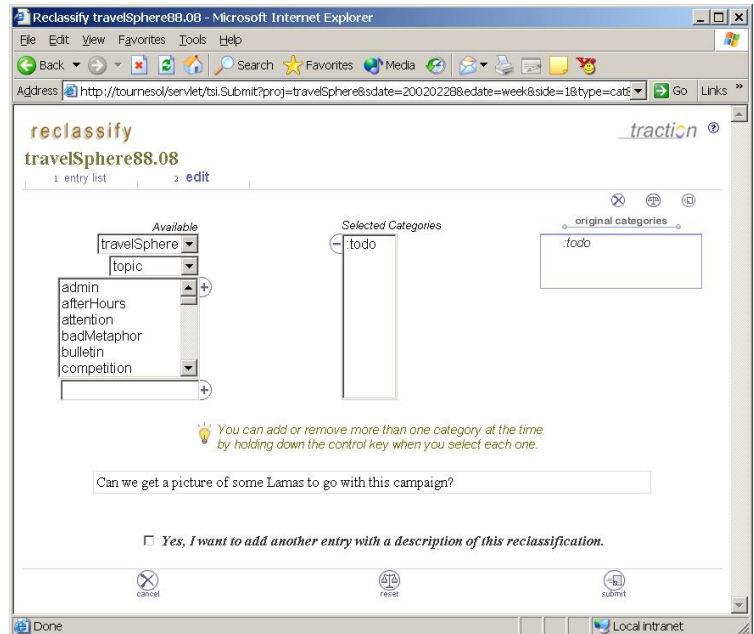
You can use labels to describe the contents of articles, e.g. *FAQ*, *Bug*, *Contact*, *Competitor*, *Technology*, or *Investment*. You can also use labels to express characteristics, e.g. *PI* for priority 1. It is common to create labels for each user's initials, and to add those initials along side things marked *todo*.

When reclassifying a paragraph, you click the +) sign on the left to add a label to the list on the right, and the (- sign on the right to remove a label from the paragraph.

If you want to change labels on other paragraphs in the same entry, click the "Entry list" tab to switch to the list of paragraphs.

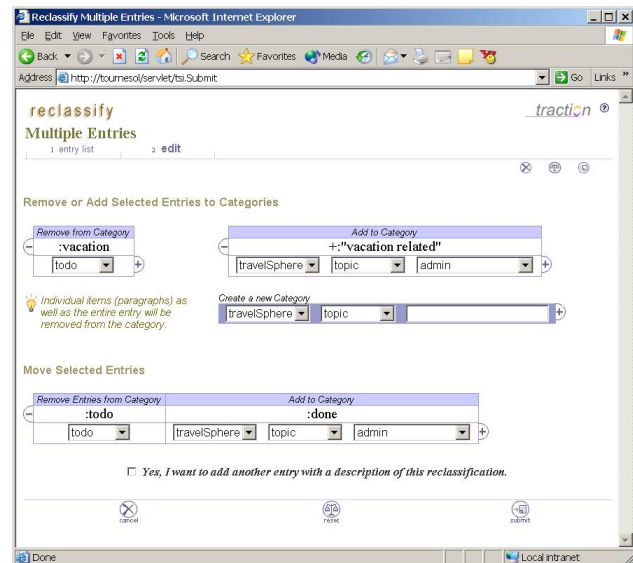
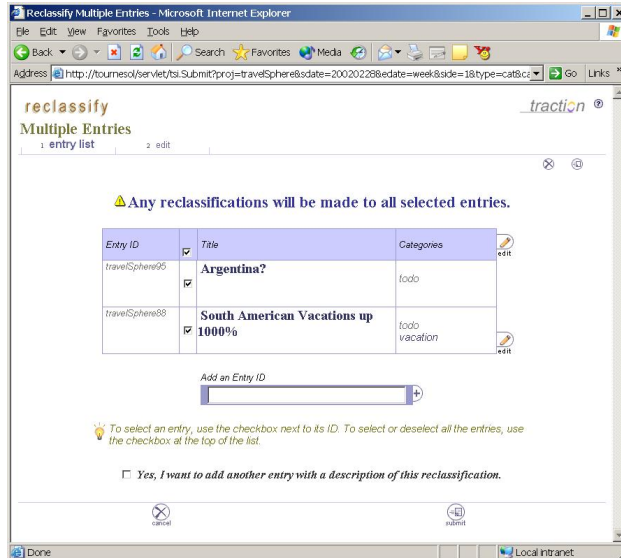
Click the pencil icon next to any paragraph to edit it.

When you are finished, click the submit button at the bottom of the page.



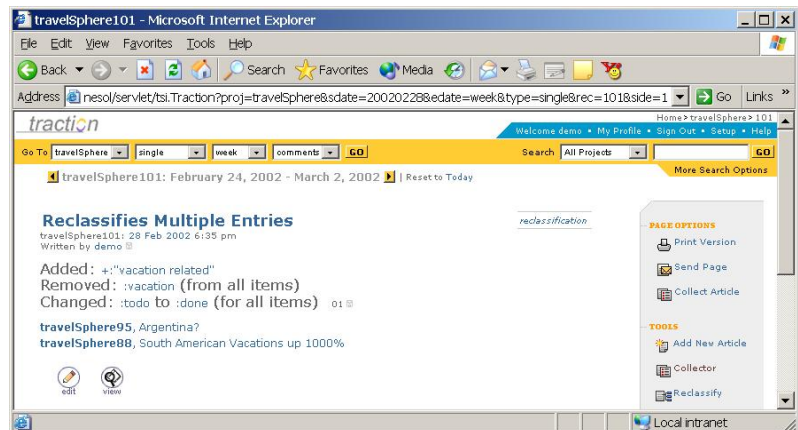
How can I do the same reclassification for multiple articles?

From any multi-entry view, or from the collector, you can choose the “reclassify multiple” action. The first page lets you check off which articles you wish the change to affect. Then click the pencil icon to specify the change you wish to make.

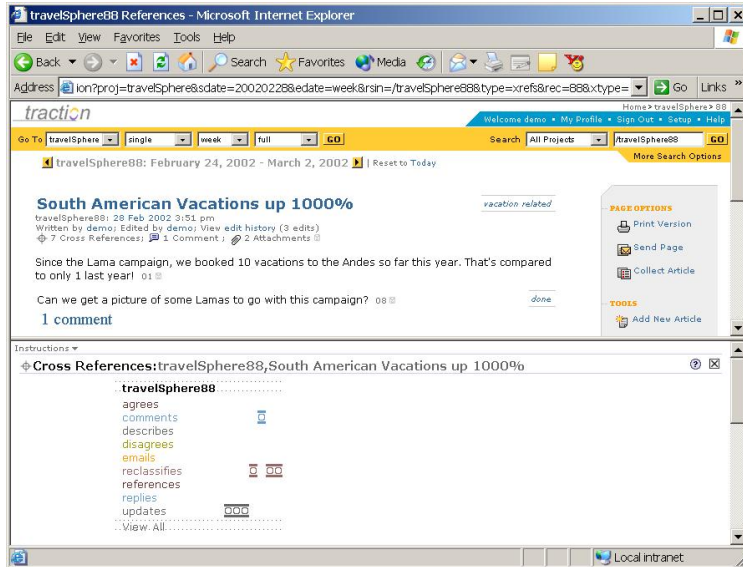


The change depicted says to change the “todo” labels to “done”, remove the label “vacation” and add the label “vacation related”.

The reclassification report is shown at right. You can click the “view” icon to show the entries, or the “edit” icon to go back and make further reclassifications to the entries.



How can I tell what has been done to a Traction entry?



Every entry has a complete audit trail associated with it. All cross-references, comments, email replies, updates, and reclassifications can be displayed either as a map, or as a timeline.

In the map view, entries earlier than the current one appear to the left of center, while later entries appear on the right.

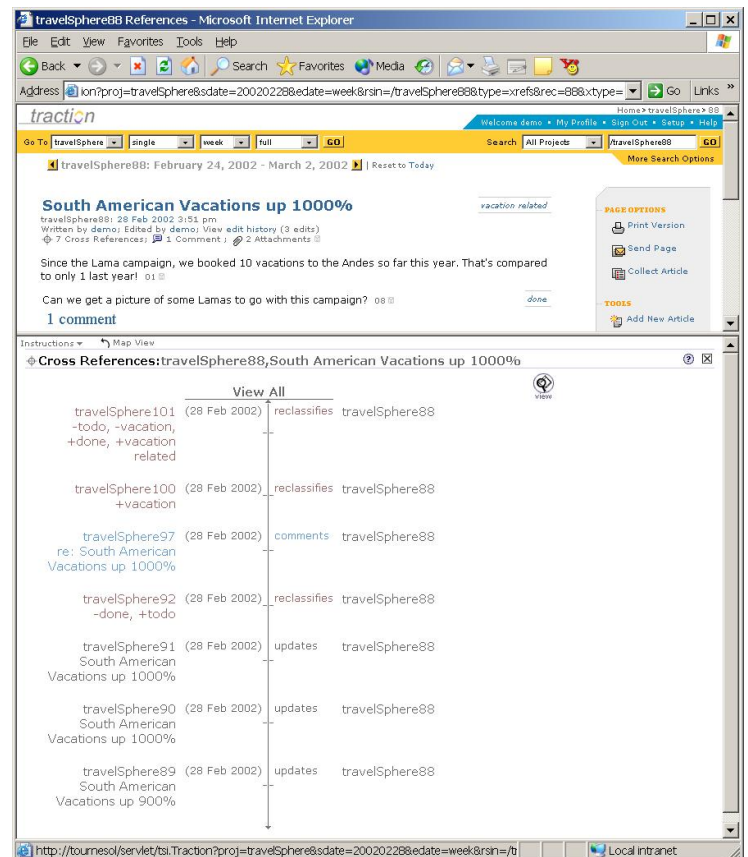
Entries that reference the entry you are focused on appear as hollow bubbles. Entries that this article references appear as solid bubbles.

To see the entry title and date associated with a bubble, hover your cursor over the bubble.

To show the merged timeline of all activity, click “view all”. To see just one type of activity, click that activity.

You can click on any bubble, or any line in the timeline, to show the corresponding article in the box on top.

To close the cross-reference panel, click the close box on the top-right of the page.

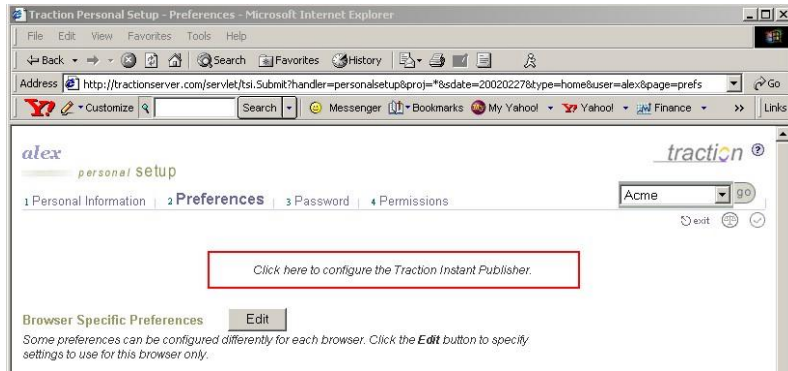


Using the Traction Instant Publisher (TIP)

The Traction instant publisher is a Windows application that lives in the system tray. It makes it very fast and easy to compose new Traction entries, and to clip content from many Microsoft applications.

How can I set up the Traction Instant Publisher?

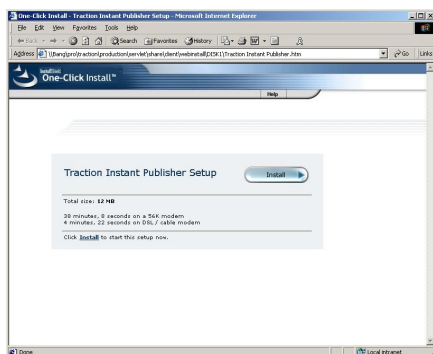
Click on the “My Account” link. This takes you to your preferences page.



Click where it says “Click here to configure the Traction Instant Publisher”.



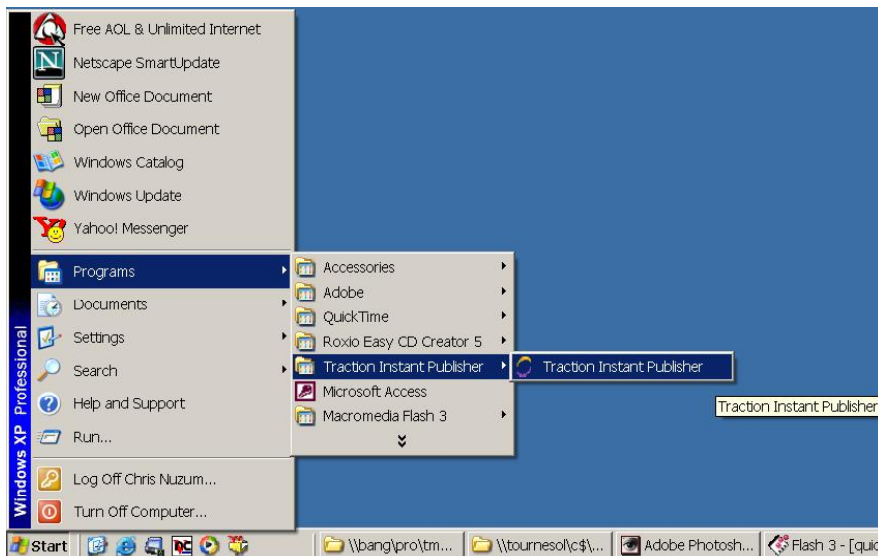
You have the option to create a Traction link to your Traction front page on your desktop. Press OK to continue to the download screen.



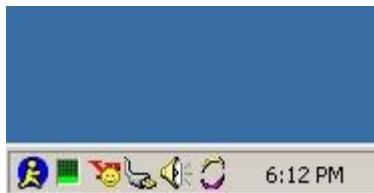
The installer will start automatically once it has been downloaded. Follow the standard installation procedure.



When you have completed the installation, run the program. Under options, you can set the instant publisher to load when you start Windows.



This will add a Traction icon to your system tray.



The Traction Instant Publisher is now installed and configured to publish to your server.

How can I log a web clipping to Traction?

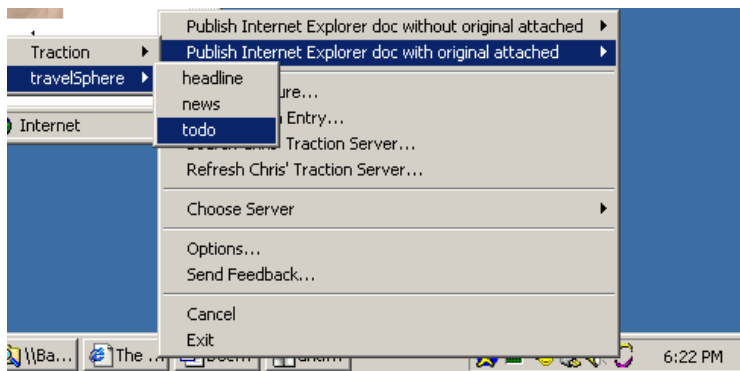
The TIP makes it easy to grab anything you see on the web and log it to Traction. You can also save a copy of the original web page, including all images.

The first step is to *select the content that you want to capture from the web page*. If you don't select anything, the TIP treats it the same way as if you selected the entire page – banner ads and all!

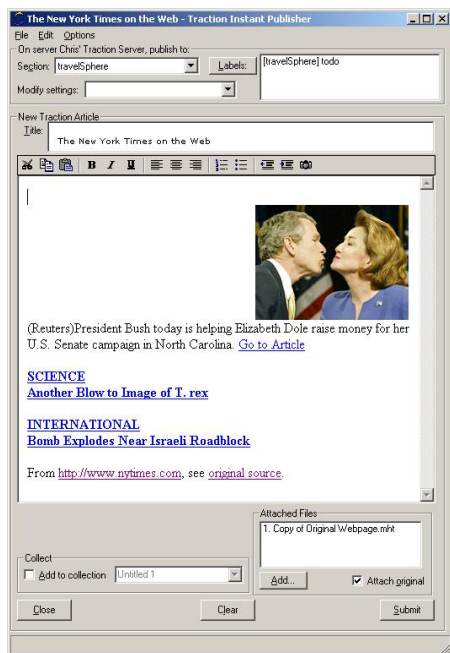
Here is an example of selecting an image and some text.



Next, click the Traction icon in the system tray and choose one of the two options at the top. From there, you can additionally choose the project and label.



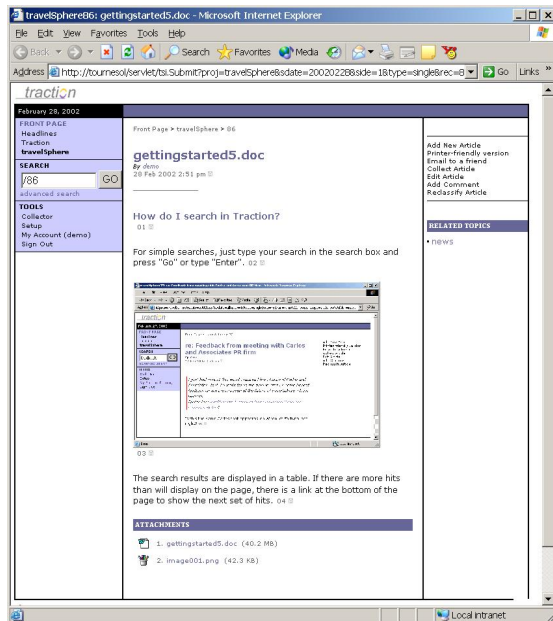
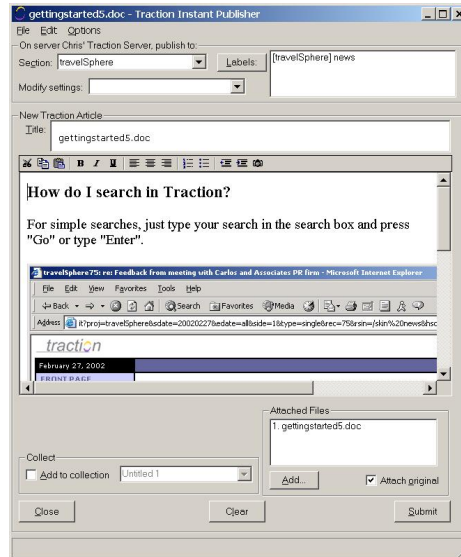
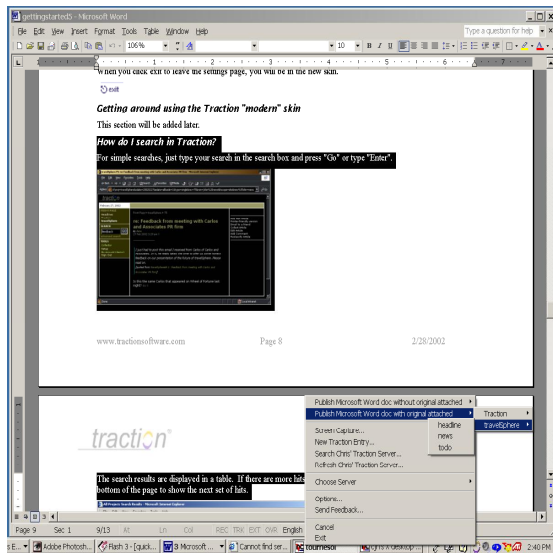
When you release the button, you will get an edit form with your selection in it. The title of the Traction entry defaults to the title of the web page. You can choose any labels you like by pressing the labels button, and you can make any contact changes you like.



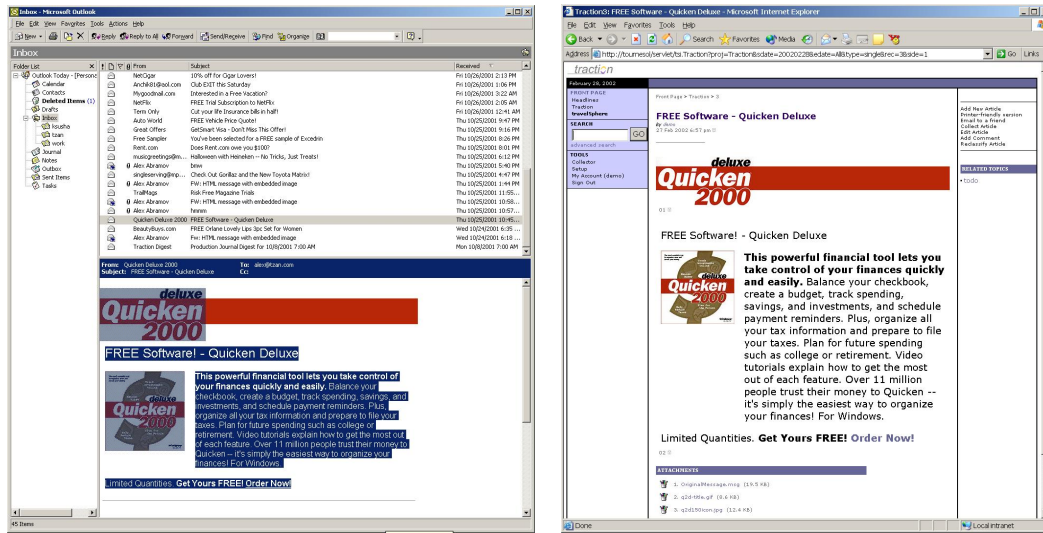
When you are satisfied with your entry, click “submit” to send it to Traction. All the images in your selection are attached to the Traction entry. If you chose to attach the original, there is also an attachment called “Copy of Original Web Page.mht”.

How can I post from a Microsoft Word document to Traction?

Publishing from Microsoft Word and Outlook works in exactly the same way as publishing from Internet Explorer: select (or take the whole document), invoke the TIP from the system tray, and submit.



Is there anything special about publishing from Outlook?



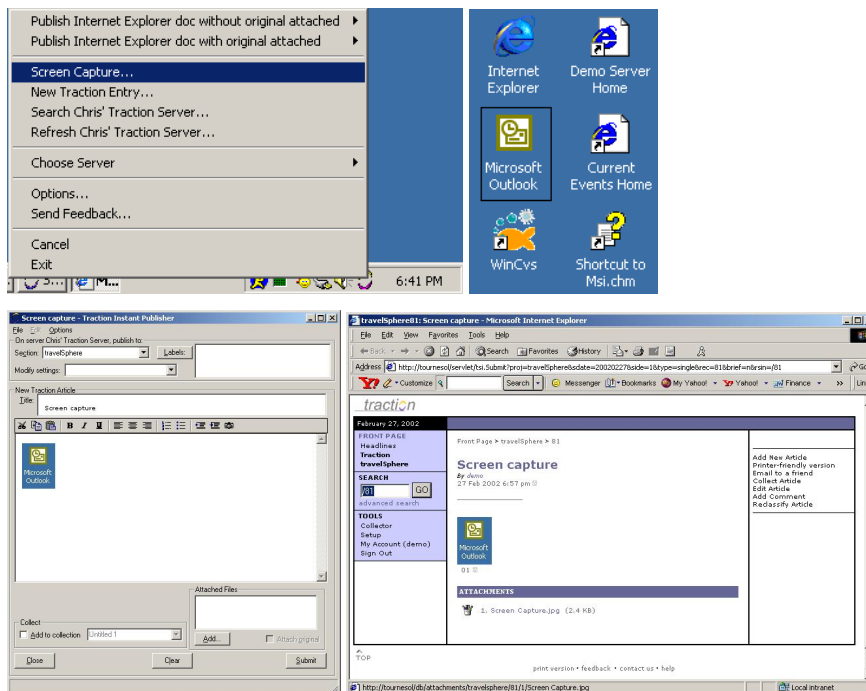
When you publish from Outlook, all attachments will be attached to the Traction entry (unless you remove them). If you choose “attach original”, a copy of the complete original Outlook mail message is included. When you click the link to the OriginalMsg.msg file, Outlook will open and display the message.

What else can I do with the Traction Instant Publisher?

Screen capture

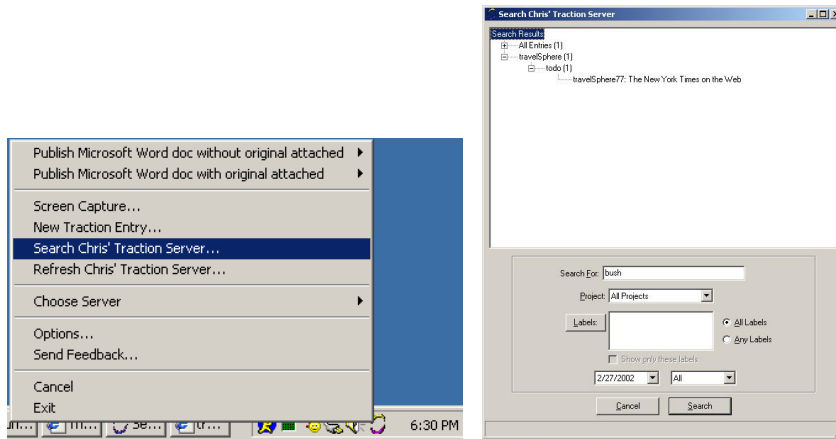
The TIP has a number of other conveniences that make it easy to get things into Traction:

You can capture any region of the screen and post it using the screen capture option. When you choose screen capture from the menu, the cursor changes to a cross. This makes it easy to grab images from PDF files or desktop programs. You can capture additional regions once the instant publisher is open by clicking the camera icon on the button bar.



Search

The instant publisher has a search feature that shows the search hits in a tree grouped by project and label.



Author new entries

As an alternative to the “Add New Article” action from the Traction browser interface, you can choose the “New Traction Entry” option from the system tray menu. The TIP includes basic HTML formatting options on the toolbar, and it supports drag & drop and cut & paste from most programs that support HTML or text.