

# CREATING ACTION ITEMS

*Action Items can be assigned to team members for tasks within a project.*

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

[Assign an Action Item from a Record](#)

[Assign an Action Item from My Page](#)

[View the Action Item Log](#)

[Complete an Action Item](#)

[Related Resources](#)

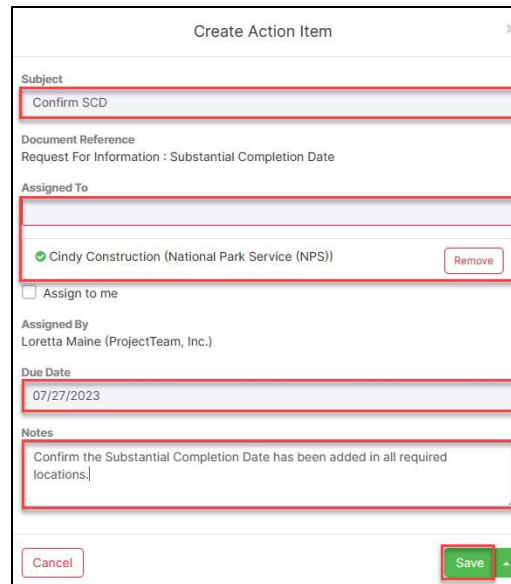
## ASSIGN AN ACTION ITEM FROM A RECORD

An Action Item can be assigned directly from a Form record.

- 1) With the record open, click **New** in the *Action Items* panel.



- 2) Enter the required fields:
  - a. **Subject**,
  - b. **Assigned To**
  - c. and **Due Date**.
- 3) Enter **Notes**, if applicable.
- 4) **Save** to create the Action Item and notify the responsible User.



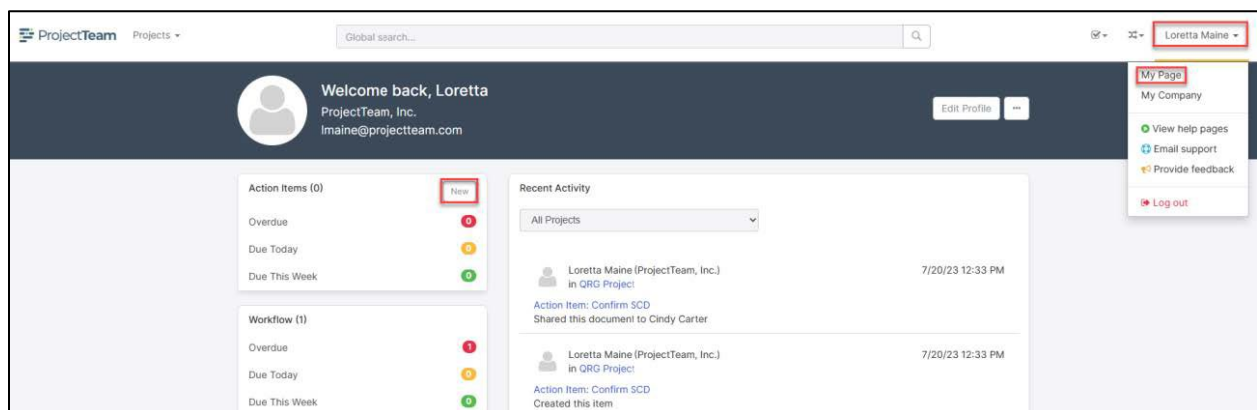
The 'Create Action Item' form contains the following fields and options:

- Subject:** A text field containing 'Confirm SCD'.
- Document Reference:** A text field containing 'Request For Information : Substantial Completion Date'.
- Assigned To:** A dropdown menu with 'Cindy Construction (National Park Service (NPS))' selected. There is a 'Remove' button next to it.
- Assign to me:** An unchecked checkbox.
- Assigned By:** A text field containing 'Loretta Maine (ProjectTeam, Inc.)'.
- Due Date:** A date field containing '07/27/2023'.
- Notes:** A text area containing 'Confirm the Substantial Completion Date has been added in all required locations.'
- Buttons:** 'Cancel' and 'Save' buttons at the bottom.

## ASSIGN AN ACTION ITEM FROM MY PAGE

An Action Item can be assigned from the *Action Items* panel of *My Page*.

- 1) From *My Page*, click the **New** button in the *Action Items* panel.



The 'My Page' screenshot shows the following elements:

- Header:** ProjectTeam logo, Projects dropdown, Global search bar, and user profile 'Loretta Maine'.
- Left Panel:** 'Action Items (0)' section with a 'New' button (highlighted in red) and a 'Workflow (1)' section.
- Right Panel:** 'Recent Activity' section showing two entries for 'Loretta Maine (ProjectTeam, Inc.)' in the 'QRG Project'.
- Right Sidebar:** 'My Page' dropdown menu with options: 'My Company', 'View help pages', 'Email support', 'Provide feedback', and 'Log out'.

- 2) The *Create Action Item* wizard will begin.
  - a. **Step 1:** Select the Project to be associated with the Action Item.
  - b. **Step 2:** The selection will default to Action item is not associated with a form but you can select a Form record to link to the Action Item.
  - c. **Step 3:** Enter the information.
    - i. *Required* fields: **Subject**, **Assigned To** and **Due Date**.
    - ii. **Notes**, if applicable.
- 3) **Save** to create the Action Item and notify the responsible User.

Create Action Item

Step 3 of 3. Finish creating your new Action Item.

Subject

Get a Copy of the Addendum

Document Reference

Request For Information : Substantial Completion Date

Assigned To

Betty Baker (National Park Service (NPS))

Remove

☐ Assign to me

Assigned By

Loretta Maine (ProjectTeam, Inc.)

Due Date

07/25/2023

Notes

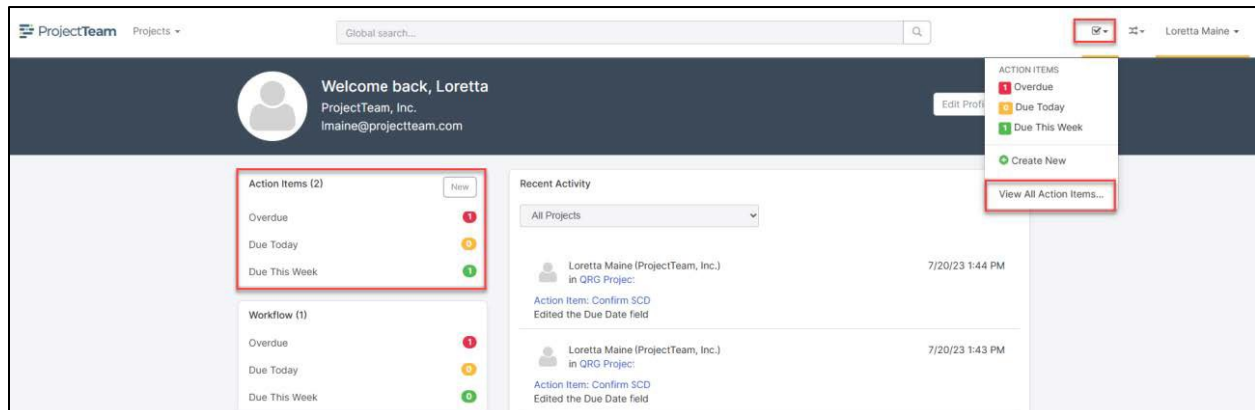
Please make sure we get the copy of the Addendum and send it to Cindy.

< Previous

Save >

## VIEW THE ACTION ITEM LOG

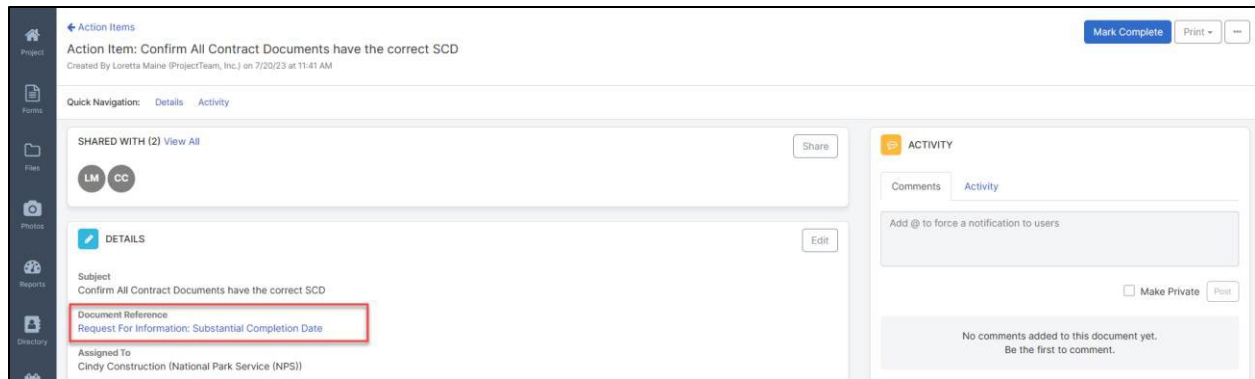
Action Items for all projects are listed into one log. The log can be accessed by clicking on any of the rows in the *Action Items* panel on *My Page* or by clicking on the Action Items icon (boxed in check mark) at the top of any page and selecting **View All Action Items**.



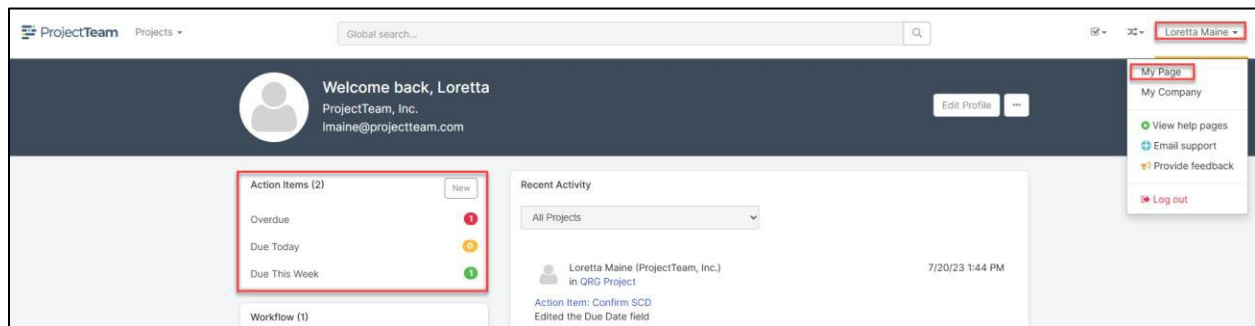
The screenshot shows the ProjectTeam user interface. At the top, there's a navigation bar with the ProjectTeam logo, a search bar, and a user profile dropdown for Loretta Maine. Below the navigation bar, the main content area is divided into several sections. On the left, there's a sidebar with a 'Welcome back, Loretta' message and a list of 'Action Items (2)' and 'Workflow (1)'. The 'Action Items (2)' section is highlighted with a red box. In the center, there's a 'Recent Activity' section showing a list of actions performed by Loretta Maine. On the right, there's a dropdown menu for 'ACTION ITEMS' with options: 'Overdue', 'Due Today', 'Due This Week', 'Create New', and 'View All Action Items...'. The 'View All Action Items...' option is highlighted with a red box.

## COMPLETE AN ACTION ITEM

Unless they changed their email notification preferences, the user that is assigned an Action Item will receive an email notification with a link directly to the Action Item. If it is linked to a Form record, the Action Item includes a Document Reference link that will open the record.



The *Action Items* pane on *My Page* will reflect all Action Items assigned to the user across all projects. All items will be displayed including a record count in the appropriate row according to the due dates under **Overdue**, **Due Today** or **Due This Week**.



- 1) To view the *Action Items* click any row on the pane.
- 2) The *Action Items shared with me* page will open.
- 3) The first tab will reflect items *Assigned to me*.
- 4) To complete an item click on the **Subject** link contained in the view to open the record.
- 5) Once the Action Item is complete, click the blue **Mark Complete** button at the top of the page.
- 6) Click the *Action Items* link in the top left corner to return to the Action Items log to complete additional items.



### RELATED RESOURCES

Help Center Links:

- [Create an Action Item from My Page](#) (projectteam.com)
- [Complete an Action Item](#) (projectteam.com)

### QRGs and Training Videos

- Initiating and Completing a Workflow
- Adding Attachments
- File Management Overview
- Photo Management
- Creating RFIs
- Responding to RFIs
- Creating Submittals
- Reviewing Submittals
- Revising Submittals
- Creating Drawings and Packages
- Viewing and Marking Up Drawings
- Revising Drawings and Packages
- Creating Meeting Minutes
- Creating Daily Reports
- Creating Punchlists
- Managing Punchlists
- Completing Punchlist Items