CREATING ACTION ITEMS

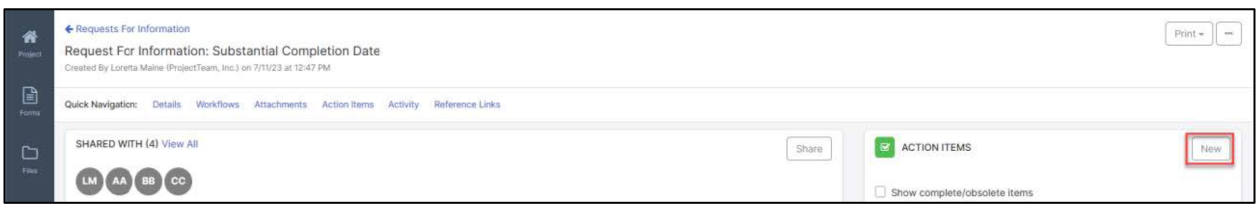
Action Items can be assigned to team members for tasks within a project.

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

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.

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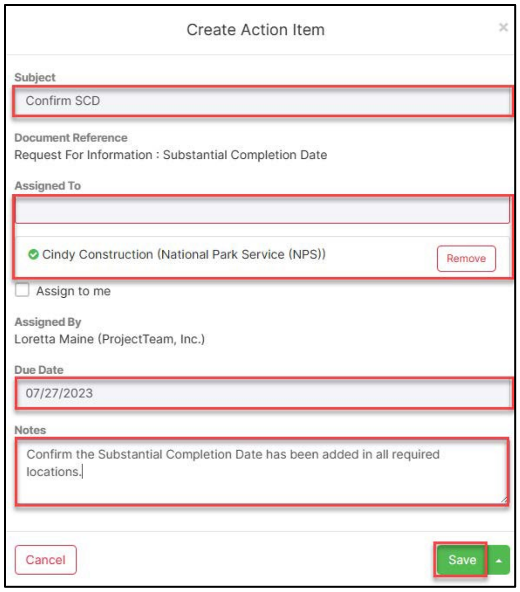
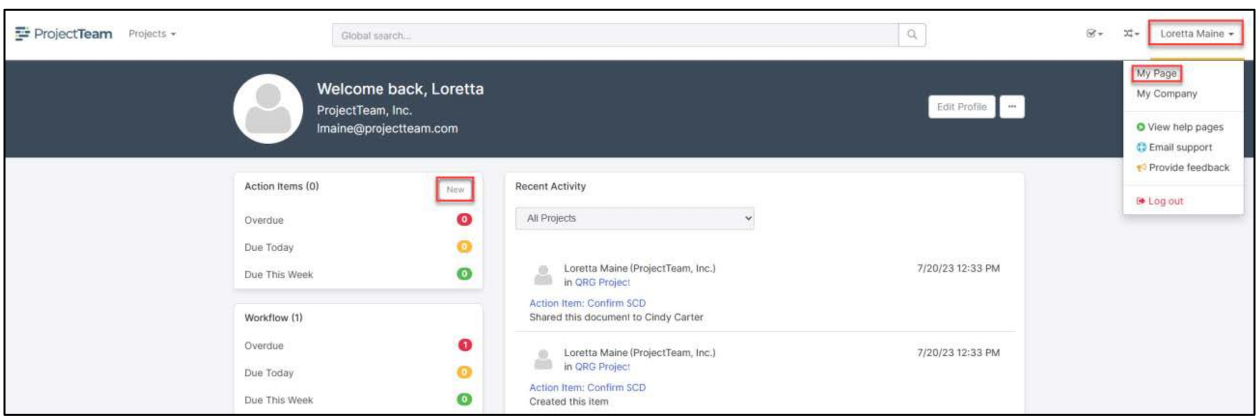


ASSIGN AN ACTION ITEM FROM MY PAGE

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.



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.

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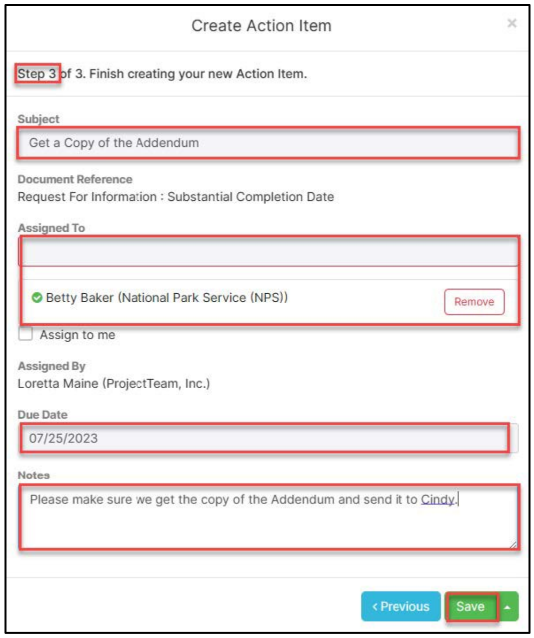
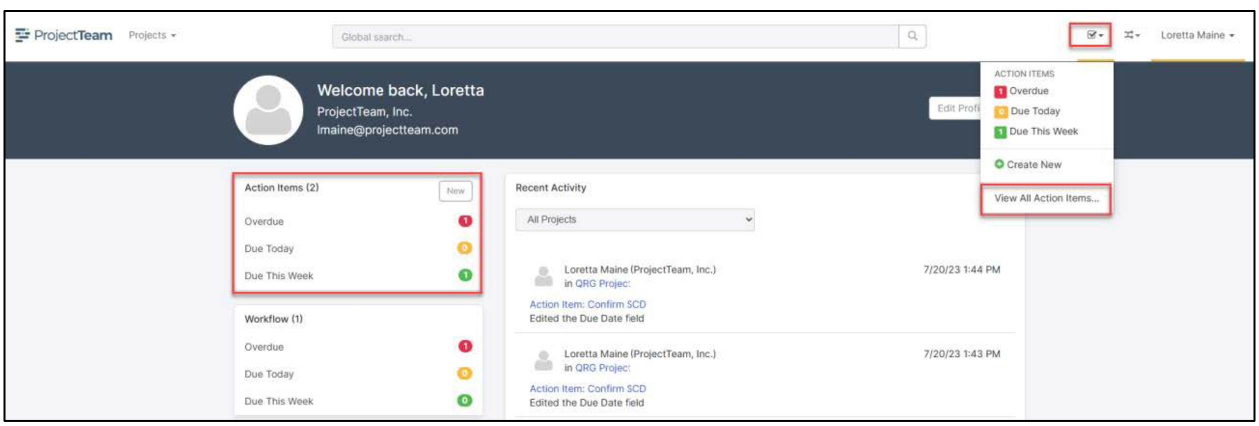


VIEW THE ACTION ITEM LOG

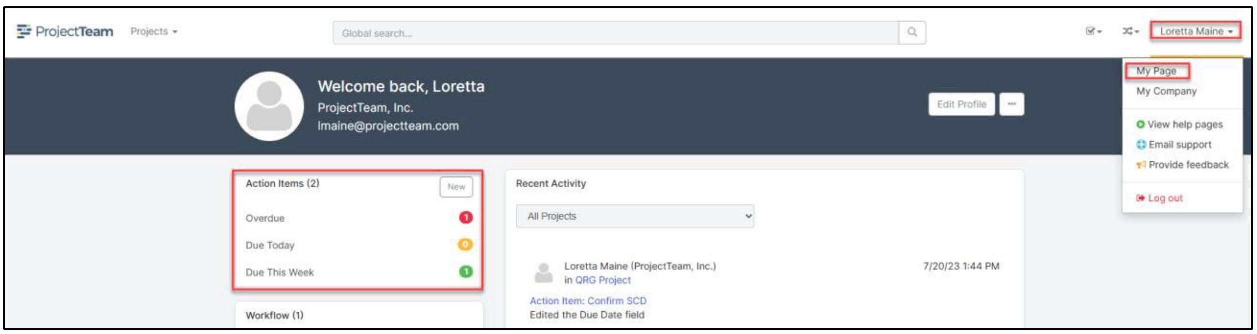
Action Items for all projects are listed into one log. The log can be accessed by clicking on any of the rows in the *Action Items* panel on *My Page* or by clicking on the Action Items icon (boxed in check mark) at the top of any page and selecting **View All Action Items**.



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.

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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

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