





Creating Action Items

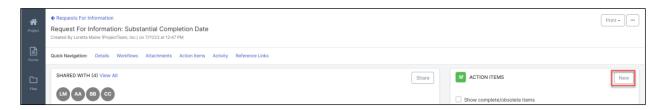
Action Items can be assigned to team members for tasks within a project.

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: **Subject**, **Assigned To** and **Due Date**.
- 3. Enter **Notes**, if applicable.
- 4. Save to create the Action Item and notify the responsible User.

Create Action Item ×
Subject
Confirm SCD
Document Reference Request For Information : Substantial Completion Date
Assigned To
Cindy Construction (National Park Service (NPS))
Assign to me
Assigned By Loretta Maine (ProjectTeam, Inc.)
Due Date
07/27/2023
Notes
Confirm the Substantial Completion Date has been added in all required locations.
Cancel Save -

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.

ProjectTeam Projects -	Global search		Q	¥- 5	C - Loretta Maine -
	Welcome back, Loretta ProjectTeam, Inc. Imaine@projectteam.com		Edit Profile ***		My Page My Company O View help pages Email support
	Action Items (0) New Overdue	Recent Activity All Projects			 ✓ Provide feedback ● Log out
	Due Today O Due This Week O Workflow (1)	Loretta Maine (ProjectTeam, Inc.) in QRG Project Action Item: Confirm SCD Shared this document to Cindy Carter	7/20/23 12:33 PM		
	Overdue Image: Constraint of the second se	Loretta Maine (ProjectTeam, Inc.) in ORG Project Action Item: Confirm SCD Created this Item	7/20/23 12:33 PM		

2. The Create Action Item wizard will begin.

Step 1: Select the Project to be associated with the Action Item.

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.

Step 3: Enter the information.

- *Required* fields: Subject, Assigned To and Due Date.
- 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 <u>Cindy</u>
< 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 \Im at the top of any page and selecting **View All Action Items**.

ProjectTeam Projects -	Global search		Q	Image: Second state Image: Second state
	Welcome back, Loretta ProjectTeam, Inc. Imaine@projectteam.com		Edit Profi	TION ITEMS Overdue Due Today Due This Week
	Action Items (2) New Overdue O Due Today O Due This Week O Workflow (1)	Recent Activity All Projects Coretta Maine (ProjectTeam, Inc.) In GRG Project Action Item: Confirm SCD Edited the Due Date field	_	create New
	Overdue Image: Constraint of the second se	Loretta Maine (ProjectTeam, Inc.) in GRG Project Action Item: Confirm SCD Edited the Due Date field	7/20/23 1:43 PM	

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.

Reproject	Action Items Action Item: Confirm All Contract Documents have the correct SCD Created By Loretta Maine BrojectTeam, Inc.) on 7/20/23 at 11-11 AM	Mark Complete Print
Forms	Quick Navigation: Details Activity	
6	ShareD with (2) View All	S ACTIVITY
		Comments Activity
Photos		Add @ to force a notification to users
	Z DETAILS Edit	
Reports	Subject Confirm All Contract Documents have the correct SCD	Make Private Pest
Directory	Document Reference Request For Information: Substantial Completion Date	No comments added to this document yet.
44	Assigned To Cindy Construction (National Park Service (NPS))	Be the first to comment.

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.

ProjectTeam Projects -	Global search			Q	€*	Coretta Maine -
	Welcome back, Loretta ProjectTeam, Inc. Imaine@projectteam.com			Edit Profile 🦛		My Page My Company View help pages Email support
	Action Items (2) New	Recent Activity				♥ Provide feedback♥ Log out
	Overdue Due Today Due This Week	All Projects Loretta Maine (ProjectTeam, Inc.) in QRG Project	ř	7/20/23 1:44 PM		
	Workflow (1)	Action Item: Confirm SCD Edited the Due Date field				

- 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.

Project	Action Items Action Item: Get a Copy of the Addendum Created By Loretta Maine (ProjectTeam, Inc.) on 7/20/23 at 1-41 PM	Mark Complete Print +
Forms	Quick Navigation: Details Activity	

Related Resources

- Help Center Links:
 - o <u>Create an Action Item from My Page (projectteam.com)</u>
 - o 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
 - o Managing Punchlists
 - Completing Punchlist Items