Creating Action Items

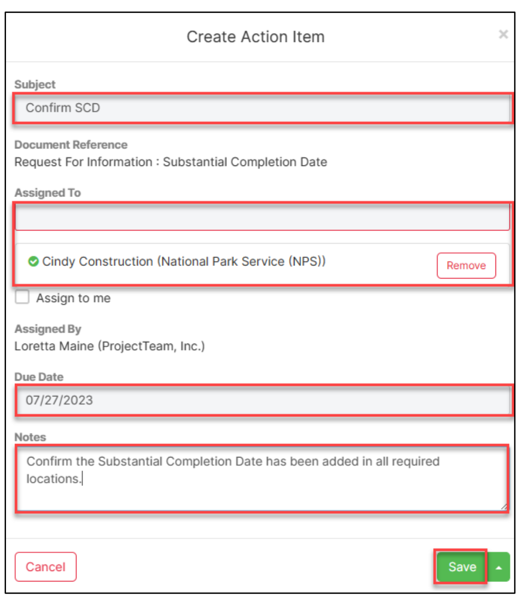
Action Items can be assigned to team members for tasks within a project.

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.

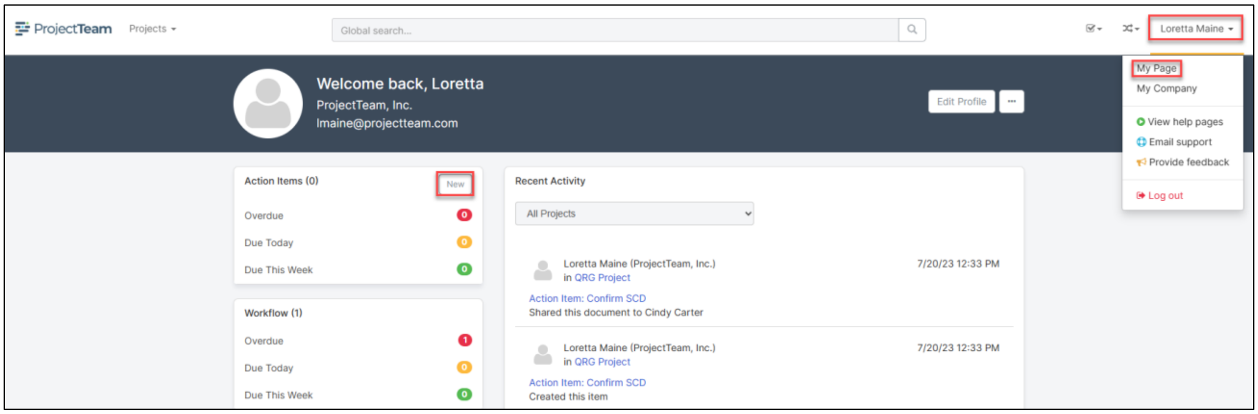
2. Enter the *required* fields: **Subject**, **Assigned To** and **Due Date**.
3. Enter **Notes**, if applicable.
4. **Save** to create the Action Item and notify the responsible User.



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.

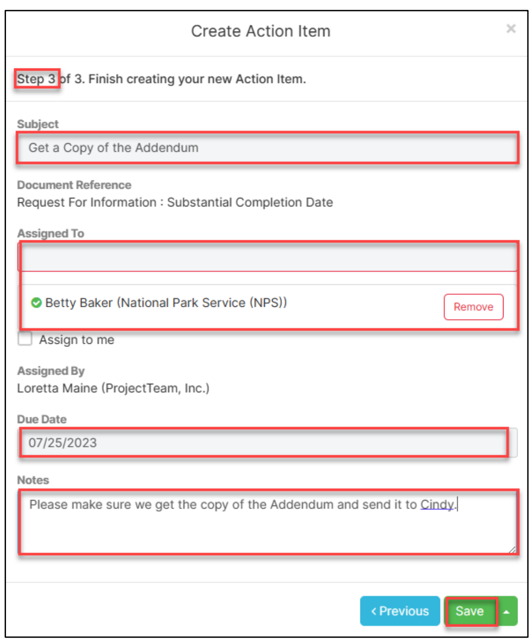


2. The *Create Action Item* wizard will begin.

   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.



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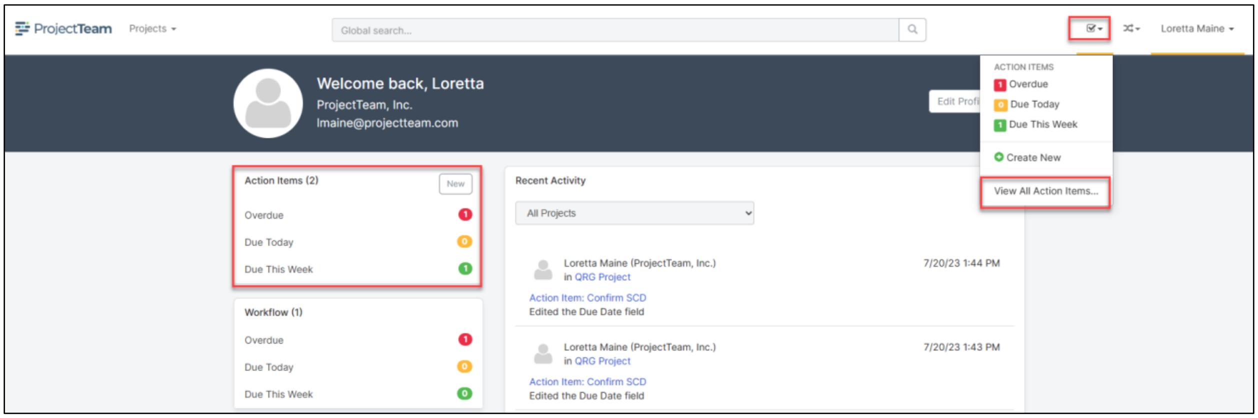
View the Action Item Log

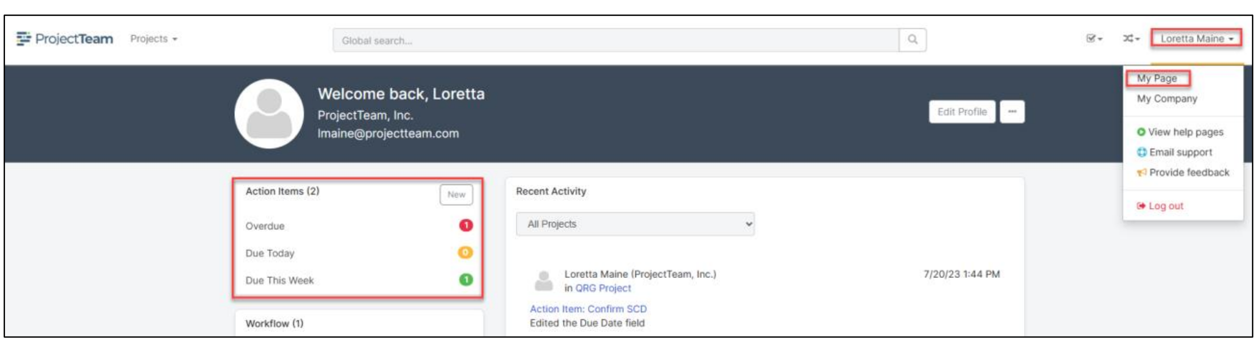
Action Items for all projects are listed into one log. The log can be accessed by clicking on any of the rows in the *Action Items* panel on *My Page* or by clicking on the Action Items icon at the top of any page and selecting **View All Action Items**.



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.

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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