

My Page – Action Items/Workflow/Recent Activity

When the user first logs in to ProjectTeam the landing page is called **My Page**. This page contains information pertaining to the logged in user including User Profile, Action Items, Workflow and Recent Activity. For Information regarding updating User Profile refer to QRG Entitled “My Page – Update Personal Profile” for instructions. The following information pertains to **Action Items**, **Workflow**, and **Recent Activity**.

[Action Items: Creating New](#)

[Action Items: Completing Existing Items](#)

[Workflow](#)

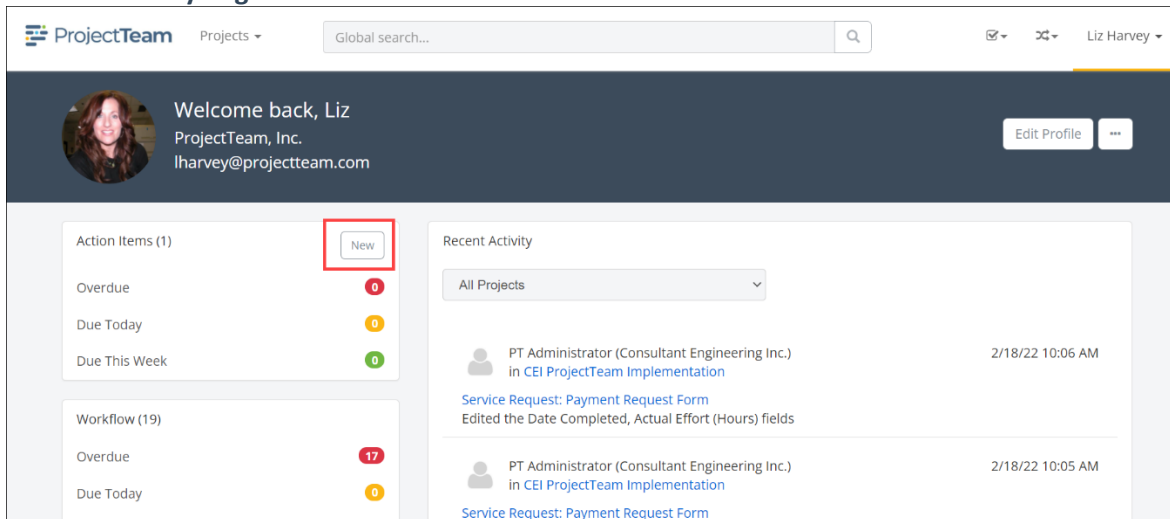
[Recent Activity](#)

Action Items – Creating New Item

In ProjectTeam.com you can assign team members actions for a particular task within a project.

1. From **My Page**, click the **New** button in the **Action Items** pane. Action Items can also be created from any form within a project.

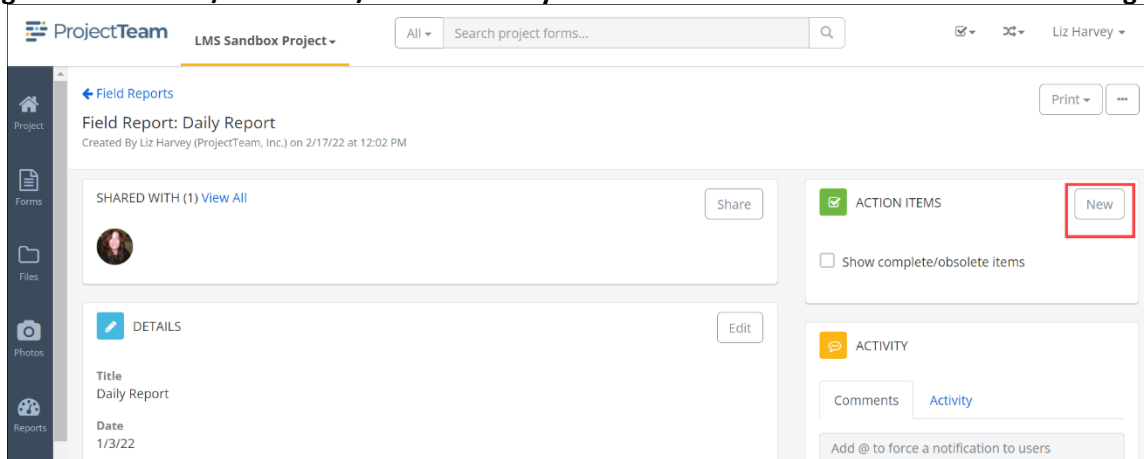
From User’s My Page:



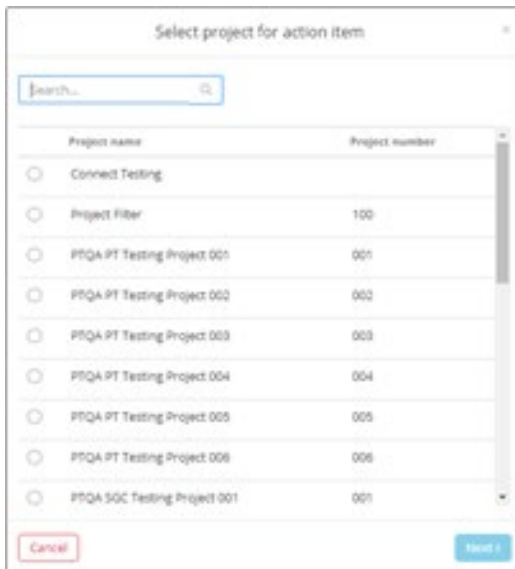
The screenshot displays the ProjectTeam user interface. At the top, there is a navigation bar with the ProjectTeam logo, a 'Projects' dropdown, a 'Global search...' input field, and user information for 'Liz Harvey'. Below the navigation bar, a dark blue header contains a profile picture and the text 'Welcome back, Liz', 'ProjectTeam, Inc.', and 'lharvey@projectteam.com', along with 'Edit Profile' and a menu icon. The main content area is divided into three sections:

- Action Items (1):** A list with categories 'Overdue' (0 items), 'Due Today' (0 items), and 'Due This Week' (0 items). A 'New' button is highlighted with a red box.
- Workflow (19):** A list with categories 'Overdue' (17 items) and 'Due Today' (0 items).
- Recent Activity:** A section with a dropdown menu set to 'All Projects'. It shows two activity entries:
 - PT Administrator (Consultant Engineering Inc.) in CEI ProjectTeam Implementation, 2/18/22 10:06 AM. Service Request: Payment Request Form. Edited the Date Completed, Actual Effort (Hours) fields.
 - PT Administrator (Consultant Engineering Inc.) in CEI ProjectTeam Implementation, 2/18/22 10:05 AM. Service Request: Payment Request Form.

From a Form:

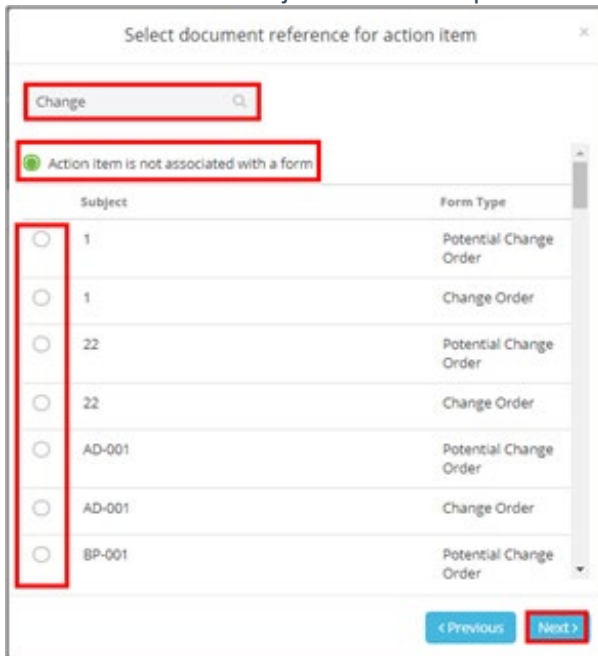


2. If creating from My Page, the **Select project for action item** modal window opens. A complete list of projects the user has access to will display. The user must select a project prior to proceeding. Use the **radio button** to the left of the project name to select a project and then click **Next**.



3. If creating from My Page, the **Select document reference for action item** modal window opens. The selection will default to **Action item is not associated with a form**. If the item is associated with a form use the Search box to easily select the appropriate form. Use the **radio button** to

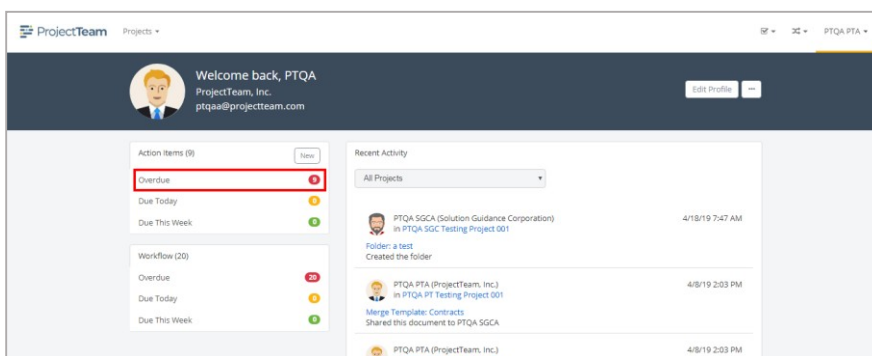
the left of the form subject to select a specific form then click **Next**.



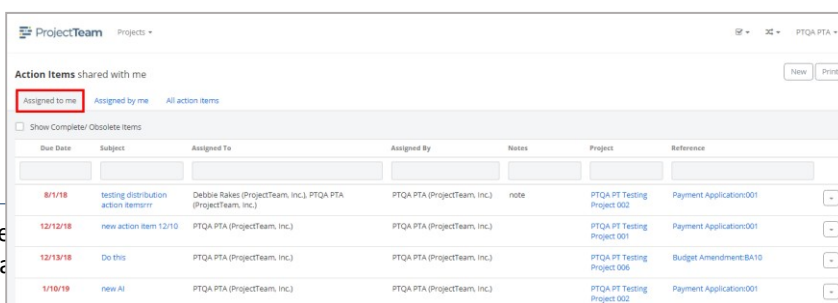
4. The **New action item** modal window opens. Complete the required fields indicated by *Required and click **Save & Share** to save and share the Action Item with the Assigned to recipient.

Action Items – Completing Existing Items

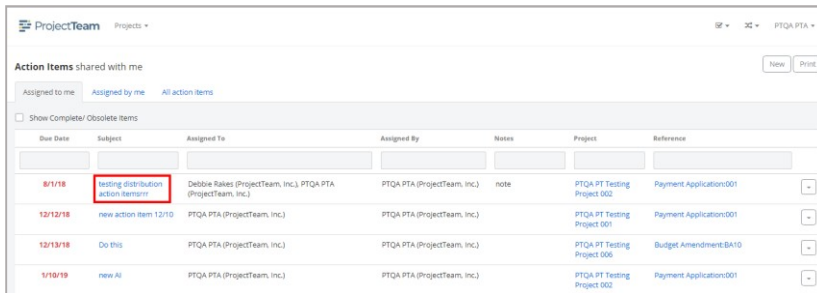
1. The **Action Items** pane on **My Page** will reflect all Action Items assigned to the user. All items will be displayed including a record count in the appropriate row according to the due dates under **Overdue**, **Due Today** or **Due This Week**. To view the Action Items click any row on the pane.



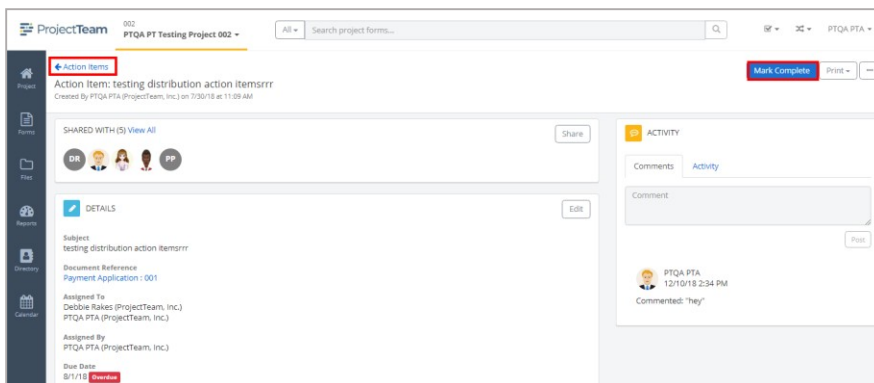
2. The **Action Items shared with me** page will open.



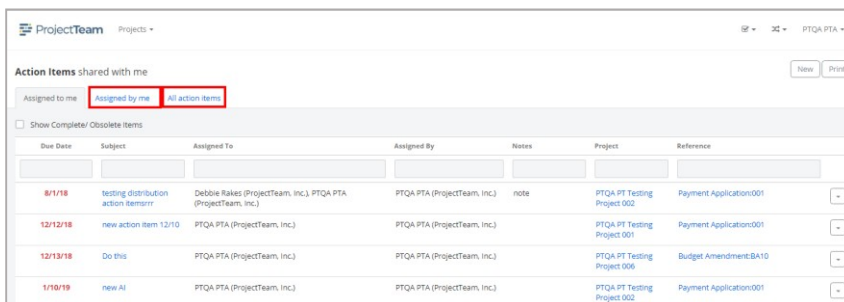
- The first tab will reflect items **Assigned to me**. To complete an item, click on the **Subject** link contained in the view.



- The action item record will open. Review the item and click the **Mark Complete** button at the top of the page once the item has been completed. Click the **Action Items** breadcrumb trail in the top left corner to return to the action items view to complete additional items.

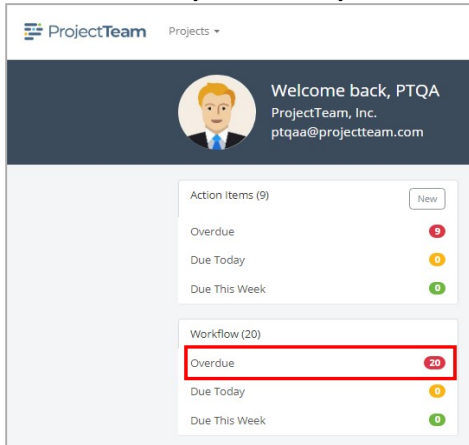


- Using the **Action Items shared with me** page, the user can also view action items **Assigned by me** and **All action items** by clicking one of the tabs.

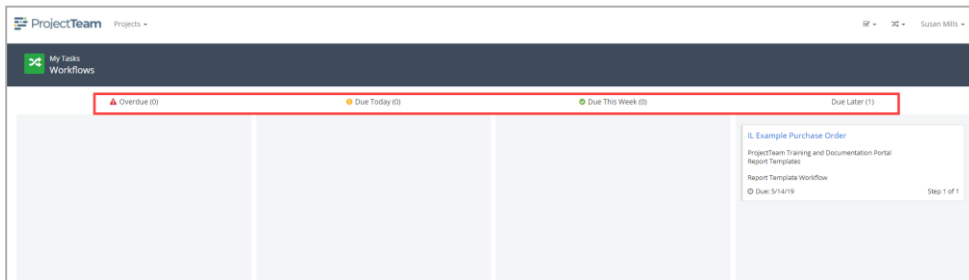


Workflow

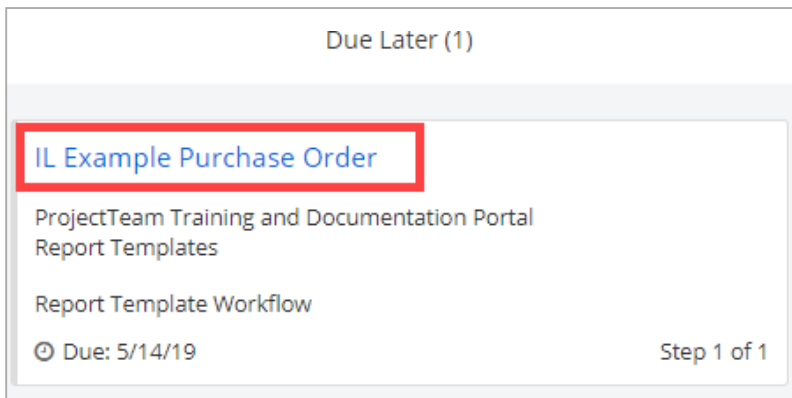
- The **Workflow** pane on **My Page** will reflect all **Workflow** records assigned to the user. All items will be displayed including a record count in the appropriate row according to the due dates under **Overdue**, **Due Today** or **Due This Week**. To view the **Workflow** click any row on the pane.



2. The **My Tasks Workflows** pane will open.
3. All **Workflow** items in your court will appear in swim lanes according to due dates with a count of how many workflow items are assigned and due to the User.



4. Click on the record **Subject** link to open the record.



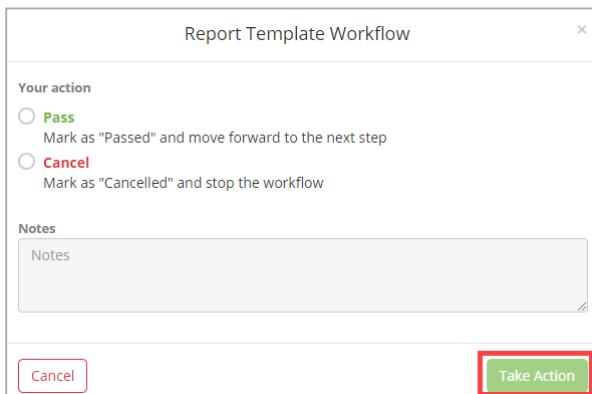
5. The appropriate form will open. On the top of the form the **Workflow for Record Name requires your action** message will display.



6. Click the **Take Action** button to perform action.



7. The **Workflow for Reporting** modal window will open. Click the radio button in front of **Pass** or **Cancel** and add any pertinent notes. Click the **Take Action** button.

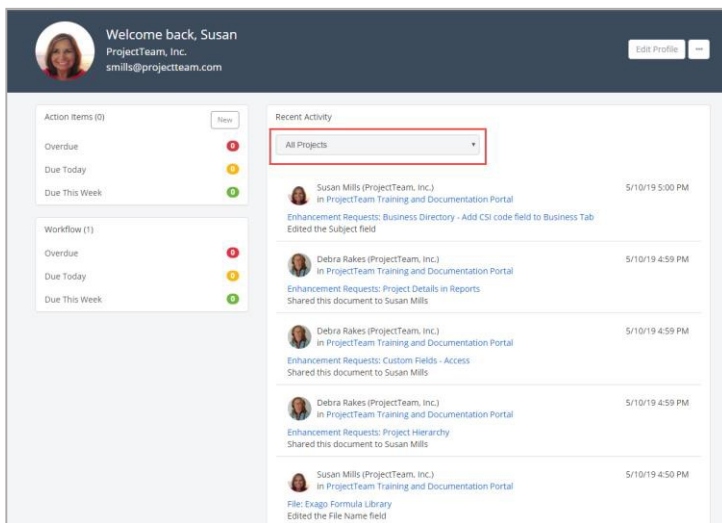


8. If **Passed**, the workflow will move to the next step and forward a notification to the next responsible party. If **rejected**, the workflow will be forwarded in a notification to the previous responsible party. If **cancelled**, the workflow will stop, and no notification will be forwarded to any party.

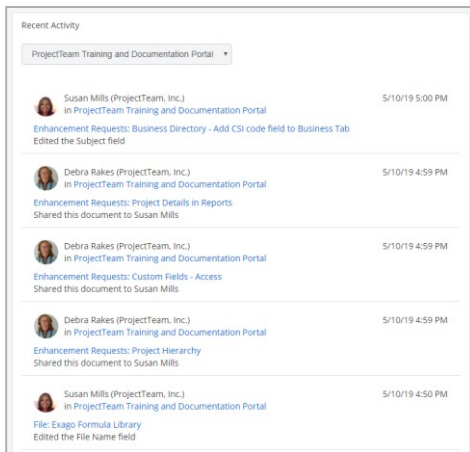
Recent Activity

The **Recent Activity** pane displays an ongoing list of activity performed and shared on all projects the User has access to. The Recent Activity will display **the User Name (Company Name), Project Name Number, Form Type Subject, the Activity Performed** and **Date Time** activity was performed.

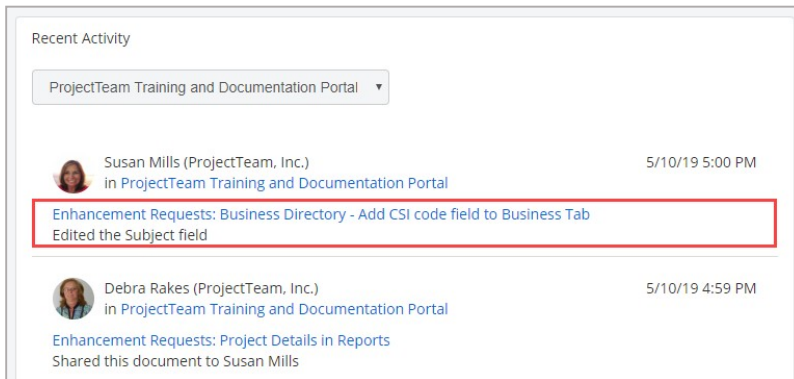
1. To review a list for a specific project, click the **All Projects** dropdown menu and select a specific project.



2. The list will be updated with only records for the selected project.

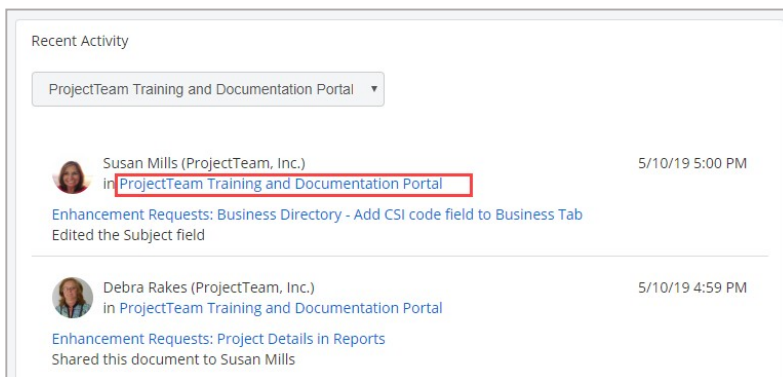


3. To review a record, click the **Record Type: Subject** link.



4. The record will be displayed.

5. To open a specific project, click the **Project Name Project Number** link.



6. The project will be opened.