
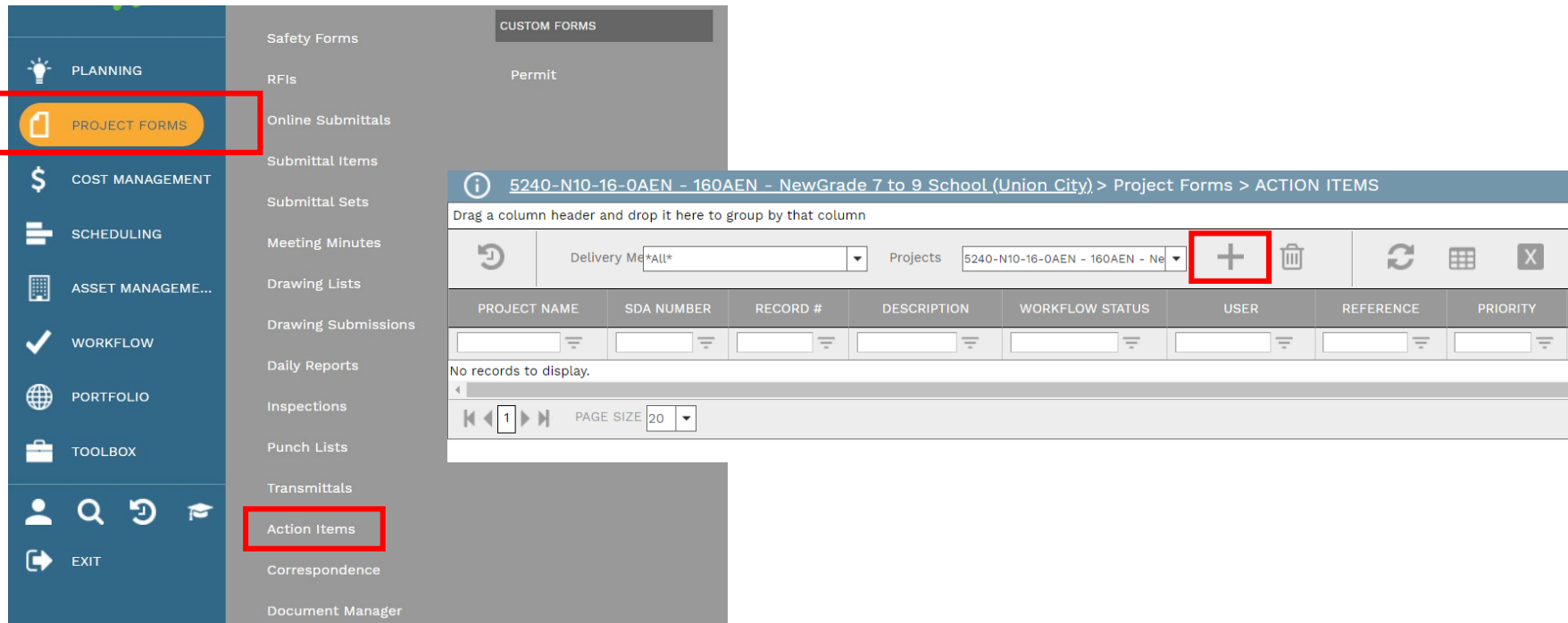


# OPEN THE MODULE








- Choose **Project Forms** -> **Action Items**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document.
- To add a new document, click the **Add** button 

The screenshot displays the PMWeb user interface. On the left is a dark blue navigation sidebar with icons and labels for various modules: PLANNING, PROJECT FORMS (highlighted with a red box), COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. The main content area shows the 'CUSTOM FORMS' section with sub-items like Safety Forms, RFIs, Permit, Online Submittals, etc. The 'Action Items' sub-item is highlighted with a red box. Below this, a breadcrumb trail reads '5240-N10-16-0AEN - 160AEN - NewGrade 7 to 9 School (Union City) > Project Forms > ACTION ITEMS'. A toolbar contains a search field with 'Delivery Me\*All\*', a 'Projects' dropdown, and a red-bordered '+ Add' button. Below the toolbar is a table with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, USER, REFERENCE, and PRIORITY. The table is currently empty, displaying 'No records to display.' and a pagination control showing 'PAGE SIZE 20'.

# ADD A NEW RECORD

- Enter all relevant information, especially any field marked with an asterisk, which is a required field.
- Remember that this document will need to be set to closed upon completion.
- Click the **Save** button when finished. Additional tabs for data entry display once the document is saved.

5240-N10-16-0AEN - 160AEN - NewGrade 7 to 9 School (Union City) > Project Forms > ACTION ITEMS

MAIN

Project\*  USER DEFINED FIELDS

Issue Number  Closed

Description  Issue Status

Status / Revision Draft  0 Issue Code








Date  Opened

User

Contract #

Priority

Linked Records  0

160AEN - NewGrade 7 to 9 School (Union City) >       

MAIN SDA DATA NOTES ATTACHMENTS COLLABORATE NOTIFICATIONS

Project\* 5240-N10-16-0AEN - 160AEN - NewG USER DEFINED FIELDS

Issue Number 001 Closed

Description system site security Issue Status

Status / Revision Draft  0 Issue Code

Date 04-13-2023 Opened 04-13-2023

User Jennifer Irizarry

Contract #

Priority Medium

Linked Records  0

Drag a column header and drop it here to group by that column

Edit Add Delete Refresh Export To Excel Paste From Excel Layouts

LINE #	ATTACHMENTS	DESCRIPTION	ASSIGNED TO	DUE	COMPLETED

No records to display.

PAGE SIZE 20

# ADD DETAIL ITEMS

- Click **Add** on the **Main** tab to add additional detail items. Information includes Description of item, Assigned party, Due Date and Status. Click the **Save** button in the Details section after each entry.

Project\* 5240-N10-16-OAEN - 160AEN - NewG

Issue Number 001

Description system site security

Status / Revision Draft 0

Date 04-13-2023

User Jennifer Irizarry

Contract #

Priority Medium

Linked Records 0

Drag a column header and drop it here to group by that column

Edit + Add Delete Refresh Export To Excel Paste From Excel Layouts

LINE #	ATTACHMENTS	DESCRIPTION	ASSIGNED TO	DUE	COMPLETED

No records to display.

PAGE SIZE 20

# ADD ADDITIONAL NOTES

- Click **Add** on the **Notes** tab to add additional notes as needed. Click the **Save** button after each entry.

160AEN - NewGrade 7 to 9 School (L)

MAIN SDA DATA **NOTES** ATTACHMENTS NOTIFICATIONS

Drag a column header and drop it here to group by that column

Edit + Add Delete Refresh Layouts

ITEM	DESCRIPTION	CREATED BY	CREATED DATE	EDITED BY	EDITED DATE

No records to display.

# ADD ATTACHMENTS

- Drag and drop files on the **Attachments** tab to add attachments (or click the Add button). Click the **Save** button after each entry.

