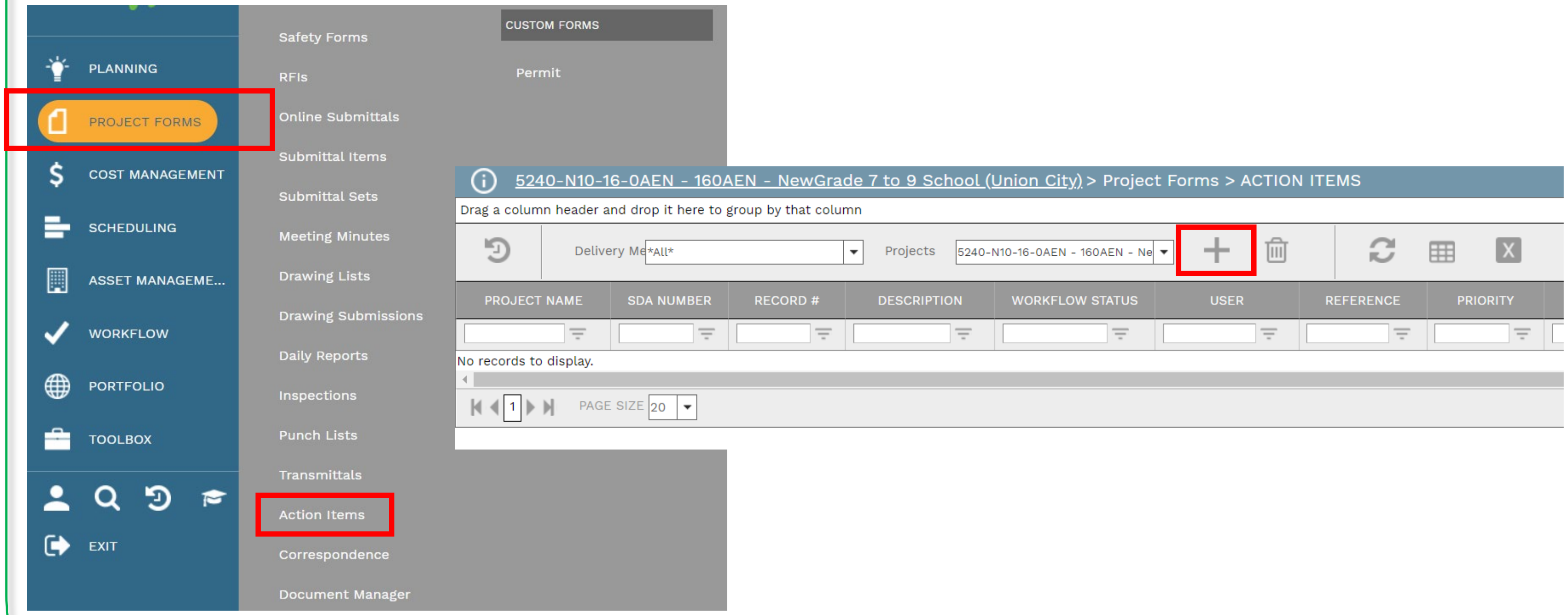
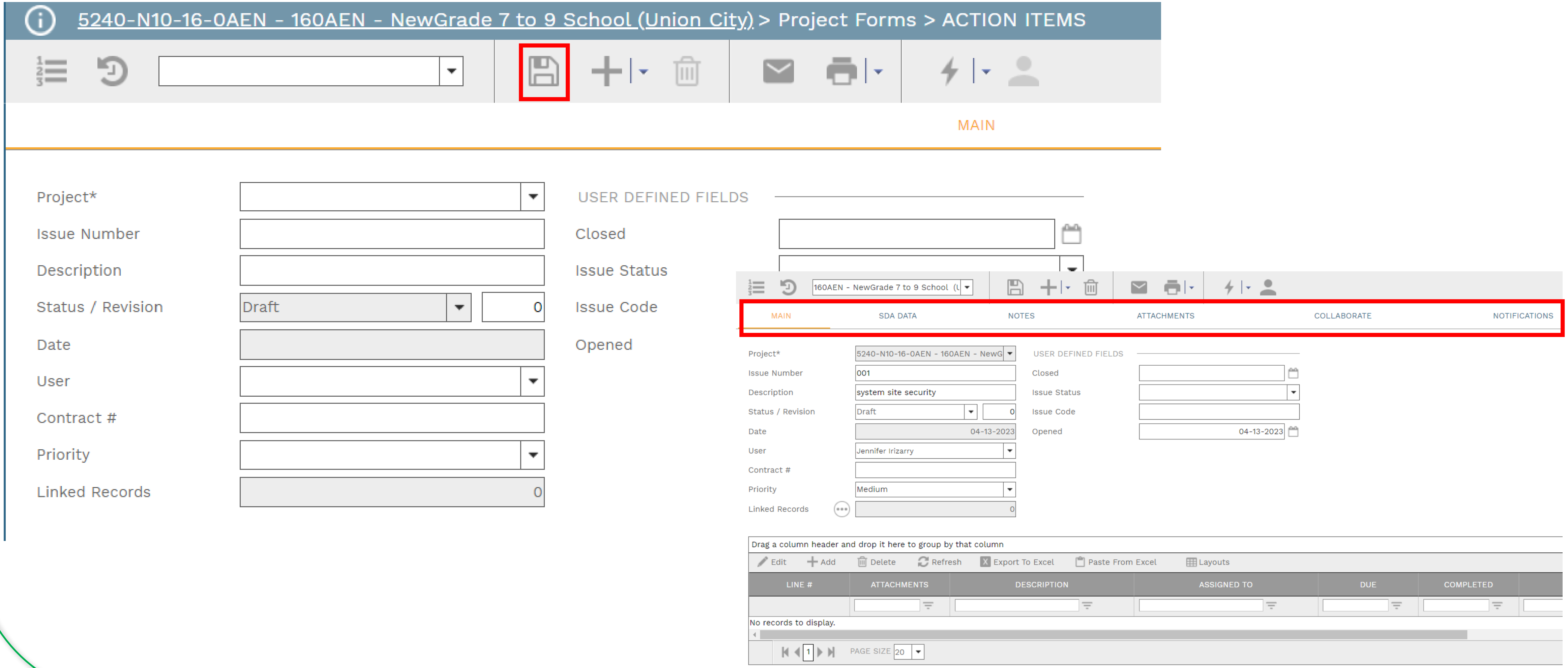
OPEN THE MODULE

- 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 +



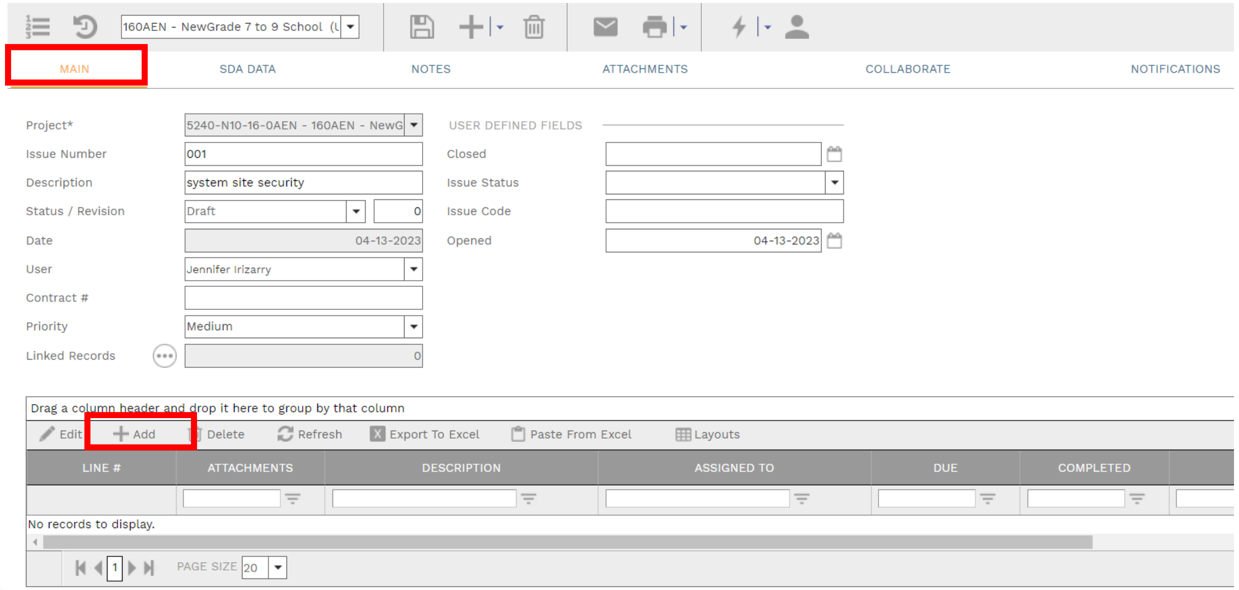
ADD A NEW RECORD

- 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.



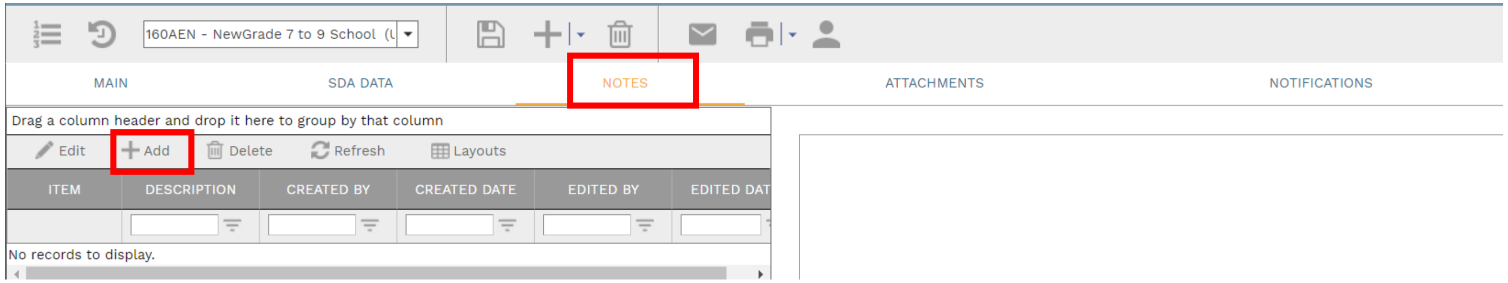
ADD DETAIL ITEMS

- 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.



ADD ADDITIONAL NOTES

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



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.