

# ACTION ITEMS

**Action Items** can encompass a wide range of project related items: problems that must be resolved before a job is completed, conditions that can lead to the creation of a Change Management record, or observations that are unique to the project. Organizing project information using Action Items enables you to quickly review each item that may affect the overall project schedule or cost.

To navigate to the Action Items, click **Project Forms**, then **Action Items** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.



The screenshot shows the software interface. On the left is a dark blue navigation menu with icons and labels for various modules: PLANNING, PROJECT FORMS (highlighted in orange), COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, and TOOLBOX. Below these are user-related icons and an EXIT button. The main content area is divided into sections: 'Safety Forms' (with sub-items RFIs, Online Submittals, Submittal Items, Submittal Sets, Meeting Minutes, Drawing Lists, Drawing Submissions, Daily Reports, Inspections, Punch Lists), 'CUSTOM FORMS' (with sub-item Permit), and 'Transmittals' (with sub-item Action Items, highlighted with a red box). A red arrow points from the 'Action Items' menu item to the right. The right side of the screenshot shows the 'ACTION ITEMS' table for project '5240-N10-16-0AEN - 160AEN - NewGrade 7 to 9 School(Union City)'. The table has columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, USER, REFERENCE, PRIORITY, REVISION #, REVISION DATE, and CREATE. The table is currently empty, displaying 'No records to display.' Above the table is a search bar with 'Delivery Me\*All\*' and a 'Projects' dropdown menu set to '5240-N10-16-0AEN - 160AEN - Ne'. A red box highlights the '+' button in the search bar area. Below the table is a pagination bar showing 'PAGE SIZE 20' and a page number '1'.

The document screen displays. Enter the following information:

- Project (**required**)
- Issue Number
- Description
- User
- Contract #
- Priority
- Closed (to be completed when Action Item is done)
- Issue Status (choose Open or Closed)
- Issue Code (this is primarily for legacy data, but a unique code can be created to identify this item)
- Opened (date Action Item was opened)

Once completed, click the **Save** button to continue.

The screenshot shows a web application interface for 'ACTION ITEMS'. The breadcrumb trail at the top reads: '5240-N10-16-0AEN - 160AEN - NewGrade 7 to 9 School (Union City) > Project Forms > ACTION ITEMS'. Below the breadcrumb is a toolbar with several icons: a menu icon, a refresh icon, a search input field, a 'Save' icon (a floppy disk) which is highlighted with a red square, a plus icon with a dropdown arrow, a trash icon, an envelope icon, a printer icon with a dropdown arrow, a lightning bolt icon with a dropdown arrow, and a user profile icon. Below the toolbar is a horizontal line with the word 'MAIN' in orange text. The main content area contains two columns of form fields. The left column includes: 'Project\*' (dropdown), 'Issue Number' (text input), 'Description' (text input), 'Status / Revision' (dropdown with 'Draft' selected and a numeric input with '0'), 'Date' (disabled text input), 'User' (dropdown), 'Contract #' (text input), 'Priority' (dropdown), and 'Linked Records' (numeric input with '0'). The right column is titled 'USER DEFINED FIELDS' and includes: 'Closed' (text input with a calendar icon), 'Issue Status' (dropdown), 'Issue Code' (text input), and 'Opened' (text input with a calendar icon).

Additional information can now be entered under the applicable tabs.

On the Main tab, Click the **Add button** to enter all relevant information in the **Details tab**. Type the details on **the peach-colored line**. Enter the **Description, Assigned To, Due Date, and any applicable Notes**. The **Completed** and **Done** fields will be completed when the Action Item is completed.

Click the **Save** button when finished.

160AEN - NewGrade 7 to 9 School

MAIN SDA DATA NOTES ATTACHMENTS COLLABORATE NOTIFICATIONS

Project\* 5240-N10-16-OAEN - 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

No records to display.


Save Cancel

LINE #	ATTACHMENTS	DESCRIPTION	ASSIGNED TO	DUE	COMPLETED	NO

No records to display.

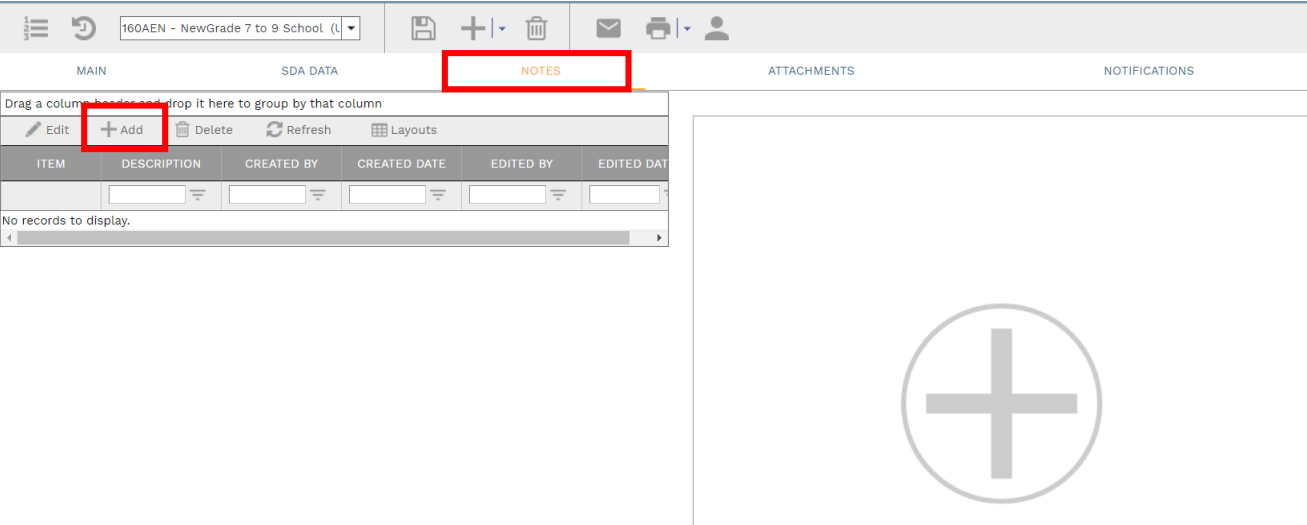
1 PAGE SIZE 20

The **SDA Data** tab will be used to house legacy information brought over from the previous project documentation system. Use the navigation buttons to view the information.

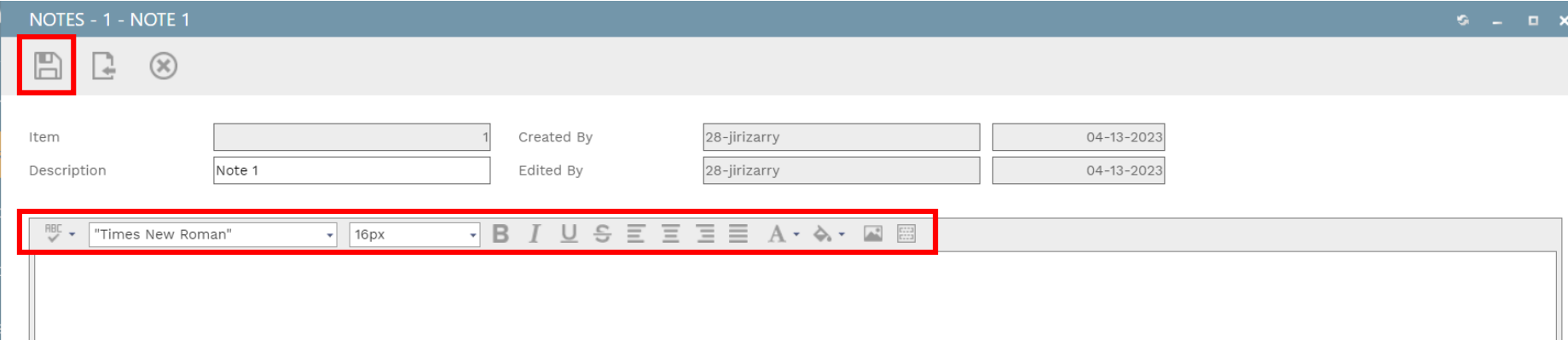
MAIN	<b>SDA DATA</b>	NOTES	ATTACHMENTS	COLLABORATE	NOTIFICATIONS
<b>SDA Data</b>	 Edit				
	SPEC	UOM	DATA	NOTES	
No records to display.					



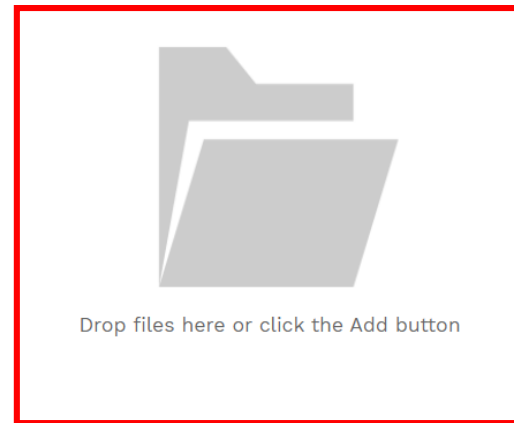
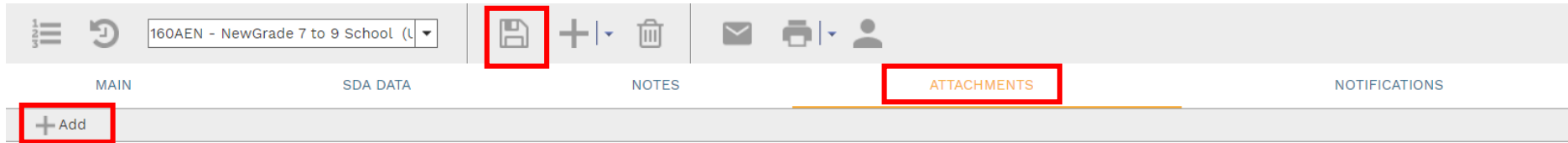
Click **Add** on the **Notes tab** to add additional notes as needed.



Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.



Any time an email is sent out of the system, an entry will automatically be posted under the **Notifications** tab with the details of the email.

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

ID	CREATED DATE	CREATED TIME	CREATED BY	SENT DATE	SENT TIME	SENT BY	REFERENCE	FROM	TO COMPANY

No records to display.

1 PAGE SIZE 20





To print Action Item information, click the **print button** and select **BI Reporting** from the drop down list. Choose an option from the report menu to receive your output (either Adobe or export to Excel) or to cancel the Reports Preview screen.

The screenshot shows the top navigation bar of the software with the breadcrumb path: 5240-N10-16-OAEN - 160AEN - NewGrade 7 to 9 School (Union City) > Project Forms > ACTION ITEMS > 001 - system site security. Below this is a toolbar with icons for home, refresh, search, save, add, delete, print, and user profile. The print icon is highlighted with a red box. A dropdown menu is open from the print icon, showing options: Go To BI Reporting Center, BI Reporting, PMWeb Reporting, and PMWeb Word. The 'BI Reporting' option is highlighted. Below the toolbar are tabs for MAIN, SDA DATA, NOTES, ATTACHMENTS, COLLABORATE, and NOTIFICATIONS. At the bottom, there are buttons for Edit, Add, Delete, Refresh, and Layouts.

The screenshot shows a window titled 'REPORTS PREVIEW' with a toolbar containing icons for close, print, cancel, next, and view.

REPORT	RECORD TYPE	DEFAULT
Action Items Form	Action Items	✓
1		

**Note:** Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.

The screenshot shows the 'Action Items Form' with the following details:

- Project: 160AEN - NewGrade 7 to 9 School (Union City)
- CBI Code: system site security
- WBE: Category: Reference Priority
- Phase: Description: system site security
- Assigned To: Status: Draft
- Revision #: 0
- Revision Date: 04-13-2023

**Details**

Line #	Description	Assigned To	Due	Completed	Not
00000					

**Linked Records**

Description	Revision	Type
No records to display		

**Specifications**

Spec	UOM	Measure	Notes
Closed		1/1/1970	
Issue Status			
Issue Code			
Closed		4/13/2023	

**Checklists**

Task / Step	Completed	Completed Date	Task / Step ID	Description	Task Type	Assigned To	Assigned To
No records to display							