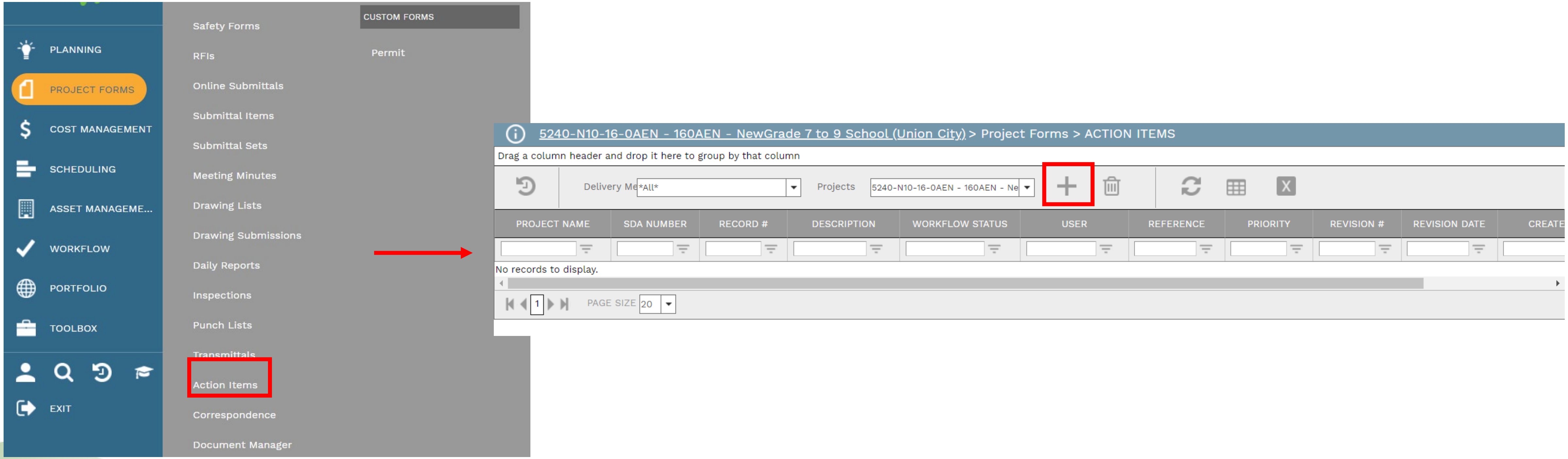
ACTION ITEMS

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.

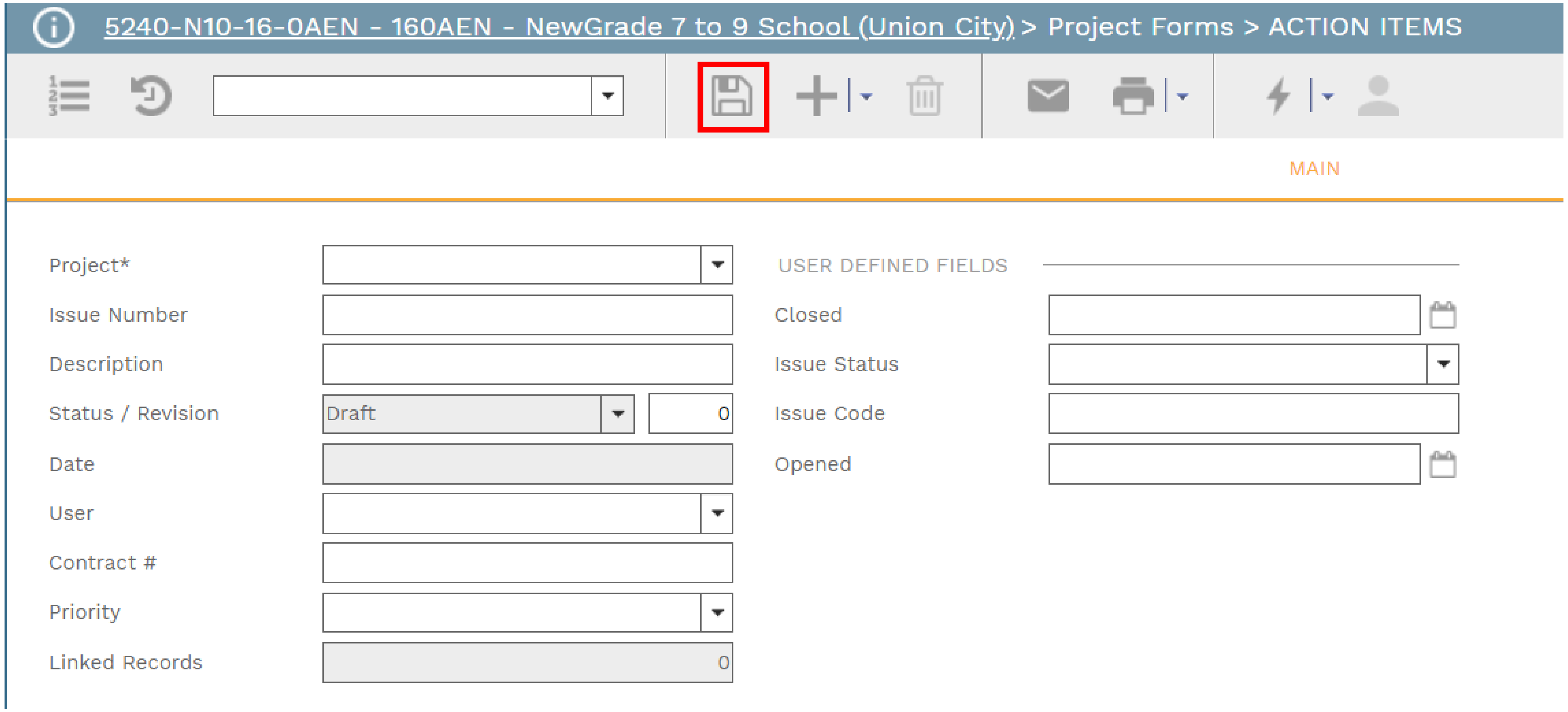
To add a new document, click the **Add** button. 



The 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)

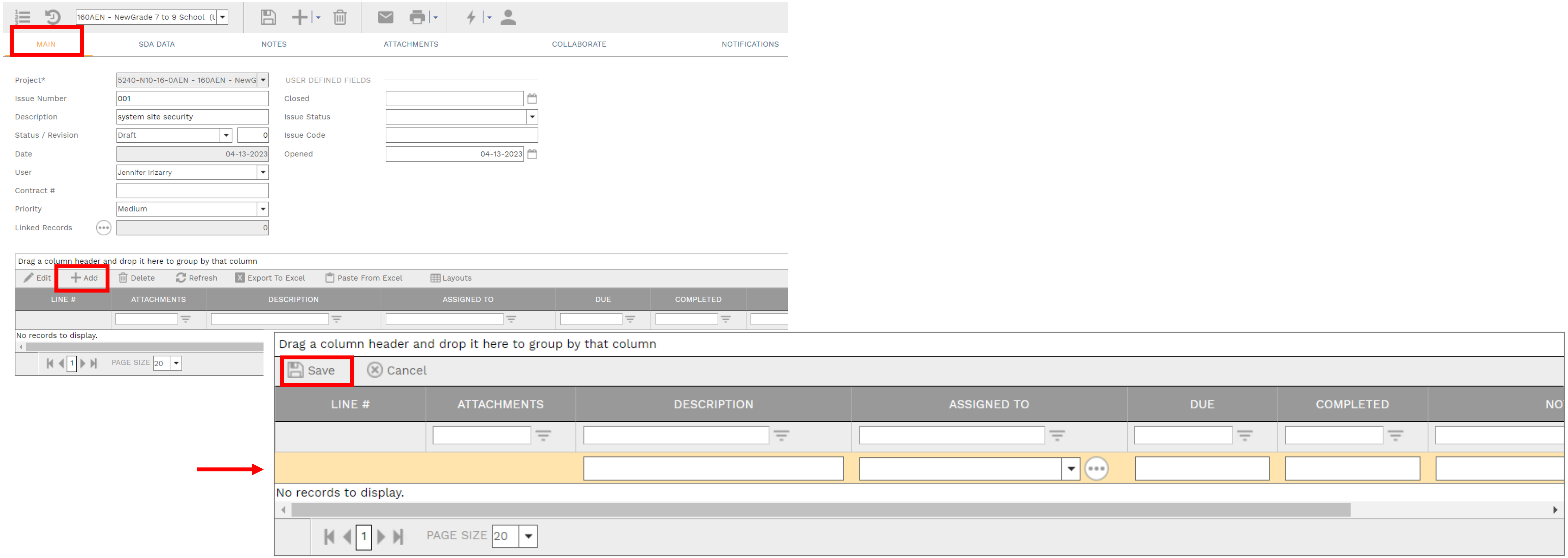
Once completed, click the **Save** button to continue.



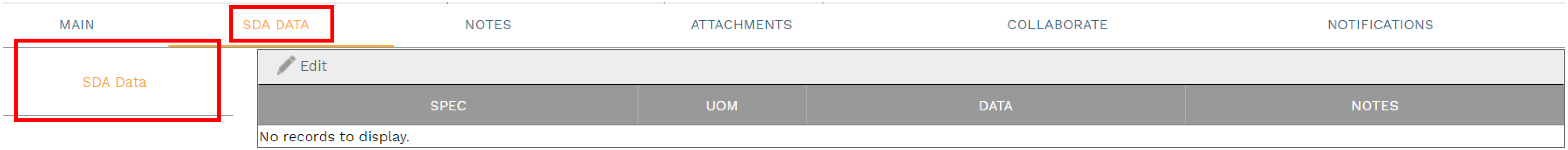
Additional information can now be entered under the applicable tabs.

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.

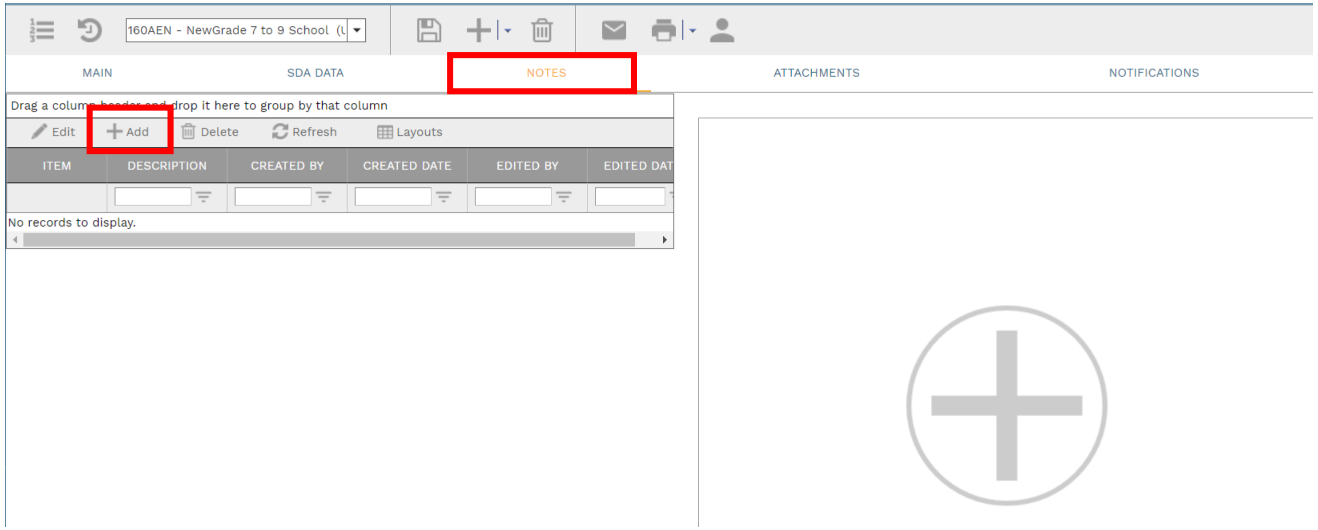
Click the **Save** button when finished.



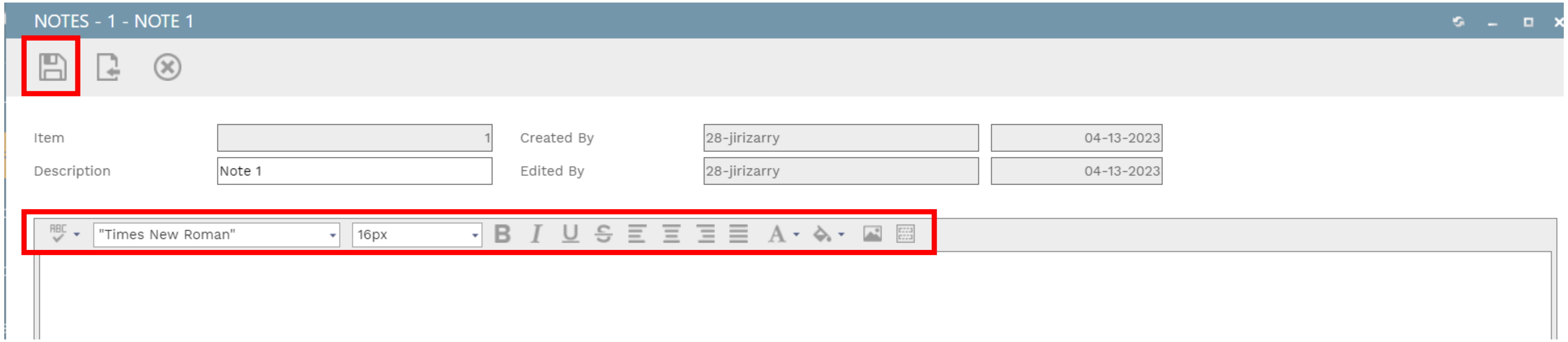
The **SDA Data** tab will be used to house legacy information brought over from the previous project documentation system. Use the navigation buttons to view the information.



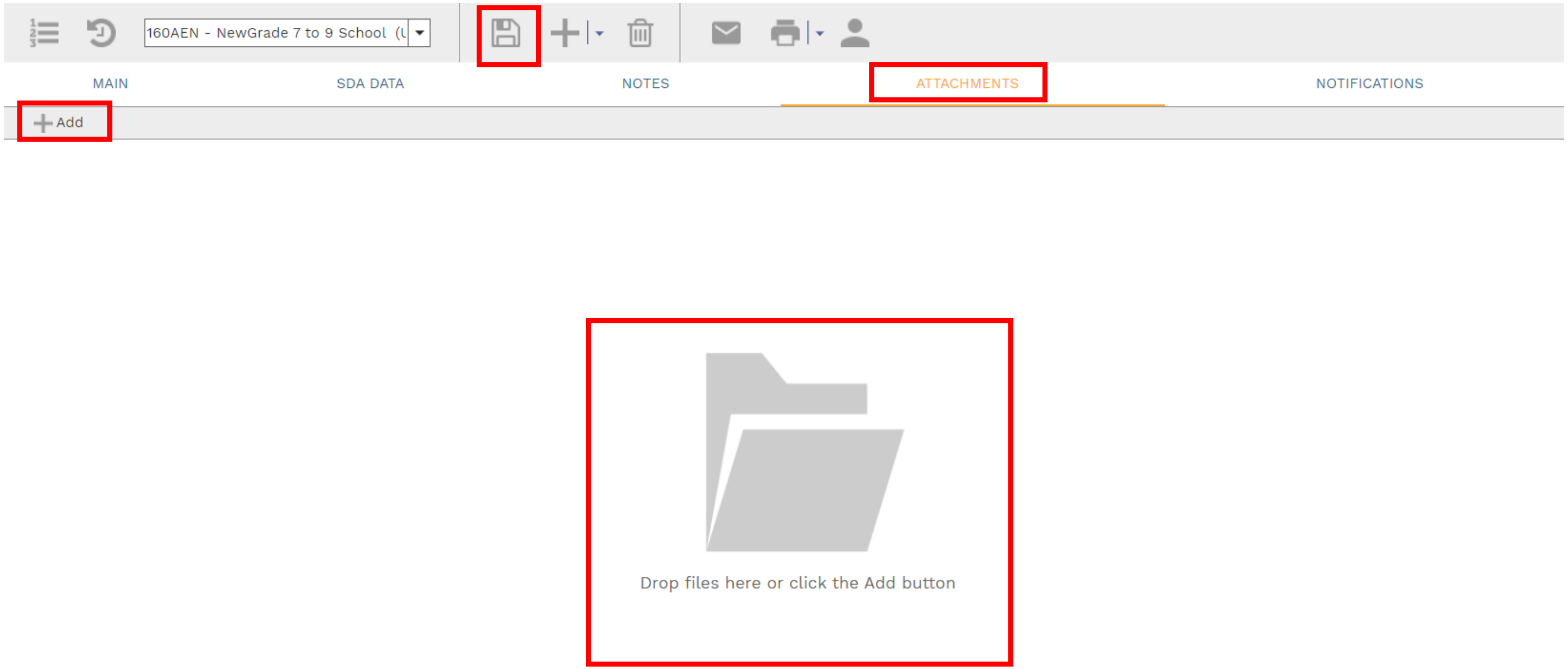
Click **Add** on the **Notes tab** to add additional notes as needed.



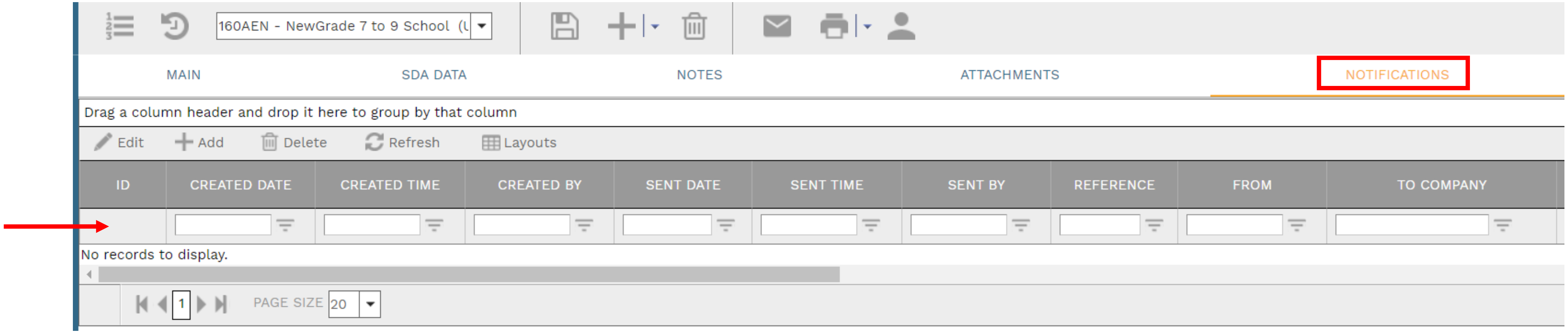
Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



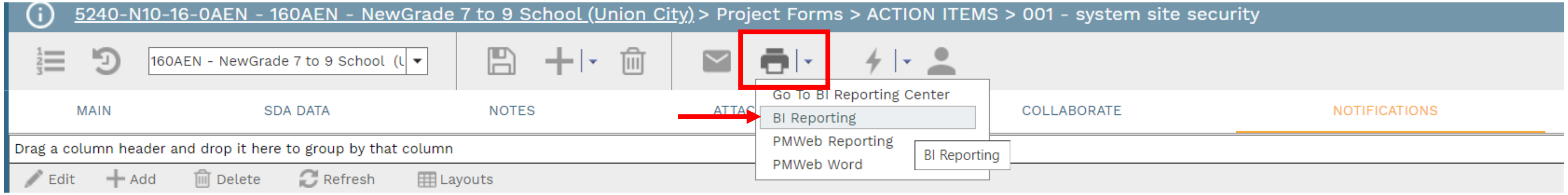
On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click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

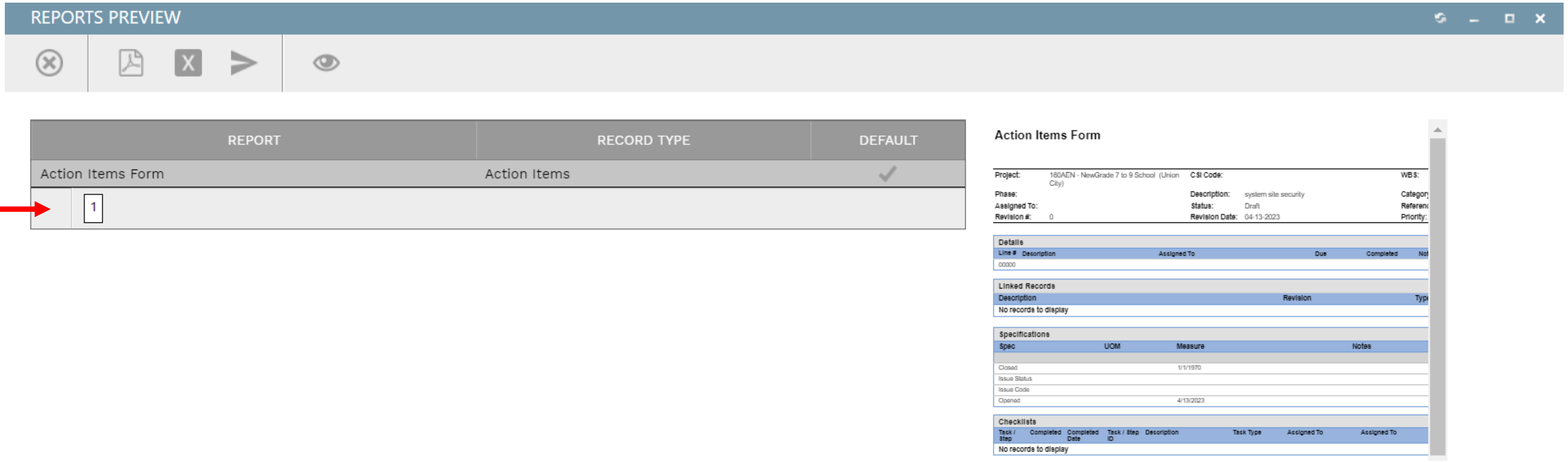


Any time an email is sent out of the system, an entry will automatically be posted under the **Notifications** tab with the details of the email.



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.





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