

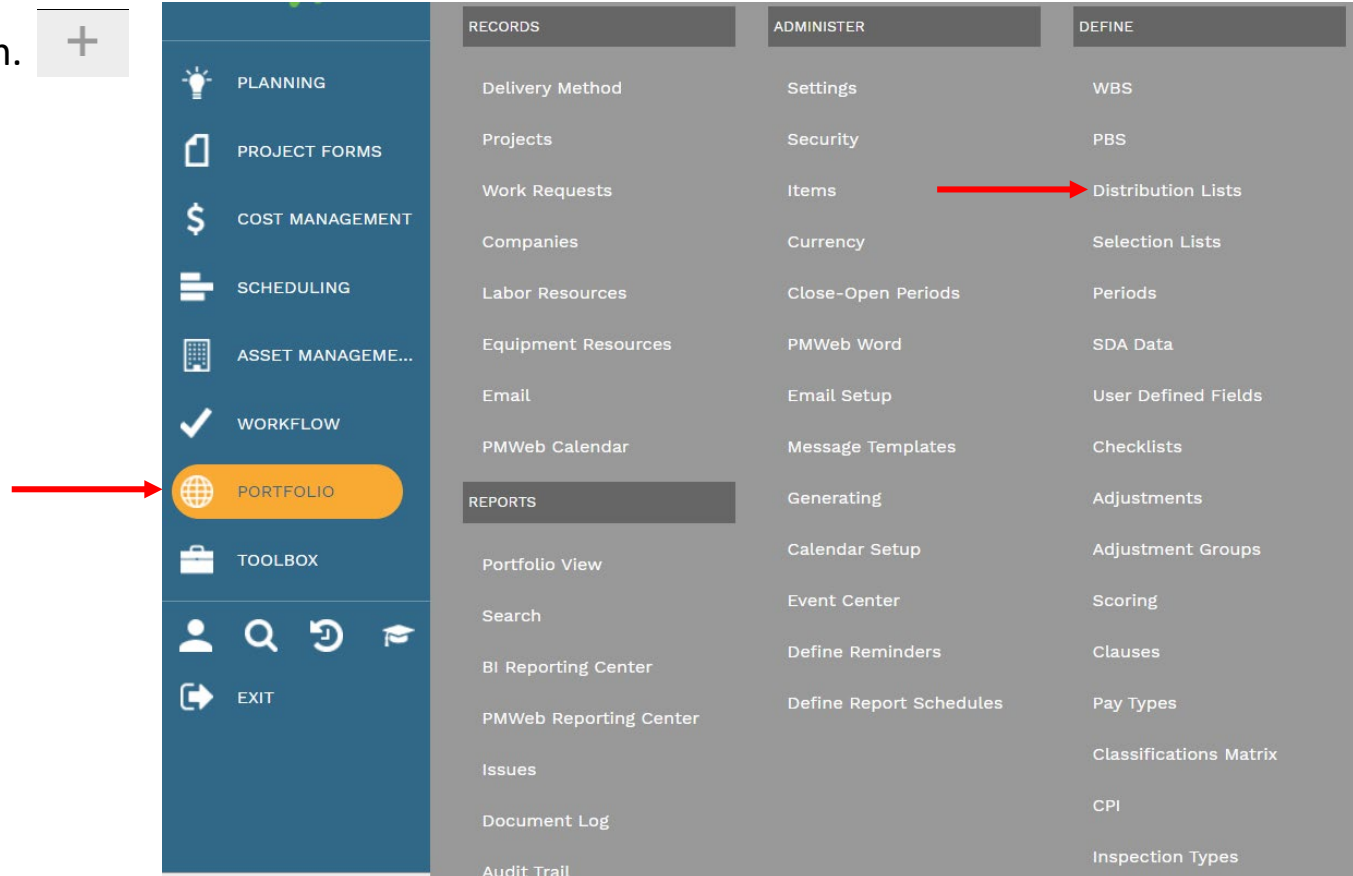
DISTRIBUTION LISTS

Distribution Lists are used in association with Notifications. By creating a Distribution List, you can add a selection of multiple names that can be accessed any time you need to send an E-Mail notification from the system.

To navigate to the Distribution Lists, click **Portfolio**, then under **Define**, choose **Distribution Lists**. 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 Description column to search for a list. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

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



The screenshot shows a software interface with a dark blue sidebar on the left containing a navigation menu. The 'PORTFOLIO' item is highlighted in orange and has a red arrow pointing to it. To the right of the sidebar is a main content area with a grid of options. The 'DEFINE' column is active, and 'Distribution Lists' is highlighted with a red arrow. A red box is present in the top right corner of the interface.

	RECORDS	ADMINISTER	DEFINE
	Delivery Method	Settings	WBS
	Projects	Security	PBS
	Work Requests	Items	Distribution Lists
	Companies	Currency	Selection Lists
	Labor Resources	Close-Open Periods	Periods
	Equipment Resources	PMWeb Word	SDA Data
	Email	Email Setup	User Defined Fields
	PMWeb Calendar	Message Templates	Checklists
		Generating	Adjustments
		Calendar Setup	Adjustment Groups
		Event Center	Scoring
		Define Reminders	Clauses
		Define Report Schedules	Pay Types
			Classifications Matrix
			CPI
			Inspection Types

The document screen displays. Enter the following information:

- District (**required** – select Portfolio)
- Project
- ID (**required** – number of your list)
- Description

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

The screenshot shows a software interface with a top toolbar containing a menu icon, a refresh icon, a dropdown menu, a **Save** button (highlighted with a red box), a plus icon, and a trash icon. Below the toolbar is a form with the following fields:

- District*: (Portfolio) [dropdown]
- Project: [dropdown]
- ID*: 007 [text input]
- Description: [text input]
- Type: [dropdown]

Below the form are two data tables. The first table has a header row with columns: COMPANY, TYPE, CONTACT, EMAIL, DEPARTMENT, and TITLE. Below the header, there are six empty input fields with filter icons. Below the table, it says "No records to display." and a pagination bar showing "PAGE SIZE 20" and a page number "1".

The second table has a header row with columns: LINE #, COMPANY, CONTACT, and EMAIL. Below the header, there are four empty input fields with filter icons. Below the table, it says "No records to display." and a pagination bar showing "PAGE SIZE 10" and a page number "1".

In the bottom section of the screen, click a selected line, or use Shift + Click to select continuous lines, or CNTRL + click to select non-continuous lines. Once selected, drag and drop them in the table to the right and release in the white space.

Click the **Save** button when finished.

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

Contacts Refresh Layouts

COMPANY	TYPE	CONTACT	EMAIL	DEPARTMENT	TITLE
A. Pensa Modern Move		Louis A. Pensa	apensamovers@aol.co		President
A. Pensa Modern Move		NULL NULL			
A. Pensa Modern Move		Louis A. Pensa	apensamovers@aol.co		President
Albin Cardy					
Ambient Group, LLC (T		Sergio Cardoso	scardoso@ambientgp.		President
Ambient Group, LLC (T		Julian Heal	jheal@ambientgp.com		
Ambient Group, LLC (T		Daron Kolb	dkolb@ambientgp.com		
Ambient Group, LLC (T		Charles Iepson	ciepson@ambientgp.co		
Ambient Group, LLC (T	Primary	Sergio Cardoso	scardoso@ambientgp.		President
Ambient Group, LLC (T		Victor Martino	vmartino@ambientgp.c		
Ana I. Taveras		Ana Taveras	anairis.taveras@gmail.		
Angel Marquez		Angel Marquez			
Angel Marquez		Angel Marquez			
Anser Advisory Manage		Matt Dandurand	matt.dandurand@anse		
Anser Advisory Manage		Joe DeMarco	joseph.demarco@anse		Project Manager
Anser Advisory Manage		Kristin Meligari	Kristin.meligari@anser		Project Manager
Anser Advisory Manage		Brandon Lantvet	brandon.lantvet@anse		Office Engineer
Anser Advisory Manage		Daniel P. Connelly	dan.connelly@anserad		Managing Directo

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DROP COMPANIES AND CONTACTS HERE

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

Delete Refresh

LINE #	COMPANY	CONTACT	EMAIL
1	A. Pensa Modern Movers	Louis A. Pensa	apensamovers@aol.
2	Ana I. Taveras	Ana Taveras	anairis.taveras@gma
3	Anser Advisory Managem	Matt Dandurand	matt.dandurand@an

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To utilize a Distribution List on any document you want to E-mail from the system, click the Notification envelope in the toolbar at the top of the document.



Click the button with the 3 dots next to the To field.

A screenshot of a "NOTIFICATION" form. The form has a header bar with a save icon, a refresh icon, a close icon, and a right-pointing arrow. Below the header, there are fields for "From", "To", "CC", "BCC", and "Manual CC". The "From" field contains "Jennifer Irizarry" and has a "System" checkbox. The "To" field is empty and has a red box around the three-dot menu icon to its left. The "CC" and "BCC" fields are also empty and have three-dot menu icons to their left. The "Manual CC" field is empty.





Select Distribution Lists, locate your project and identify your desired Distribution List. Click to select your list and drag and drop it in the table to the right and release in the white space. Click **Save and Close** to continue.

A screenshot of a "SELECT COMPANIES/CONTACTS" dialog box. The dialog has a header bar with a refresh, minimize, maximize, and close icon. Below the header, there are two tabs: "COMPANIES/CONTACTS" and "DISTRIBUTION LISTS". The "COMPANIES/CONTACTS" tab is active, showing a tree view of a portfolio. The "DISTRIBUTION LISTS" tab is also visible, showing a table of contact information. A red box highlights the tree view, and another red box highlights the "Save and Close" button. The table has columns for "COMPANY", "CONTACT", and "EMAIL".


COMPANY	CONTACT	EMAIL
A. Pensa Modern Movers	LPensa-Louis A. Pensa	apensamovers@aol.com
Ana I. Taveras	Ana Taveras-Ana Taveras	anairis.taveras@gmail.com
Anser Advisory Management LLC	Matt Dandurand-Matt Dandurand	matt.dandurand@anseradvisory.com


The names you selected in your Distribution List will display in the To field. You can repeat this process for the CC and BCC fields, if needed. Use the Manual CC field to manually type in an e-mail address for any user that does not have a PMWeb account.


NOTIFICATION


   

From System

 To

 CC

 BCC

 Manual CC

