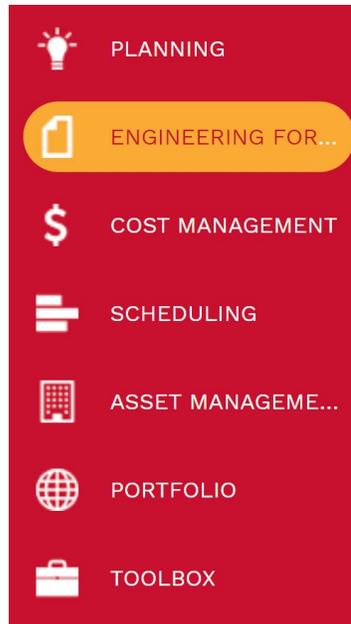




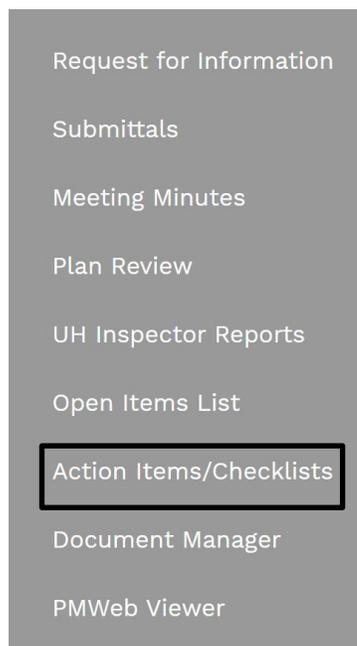
PMWeb Quick Reference

UH Create an Action Item

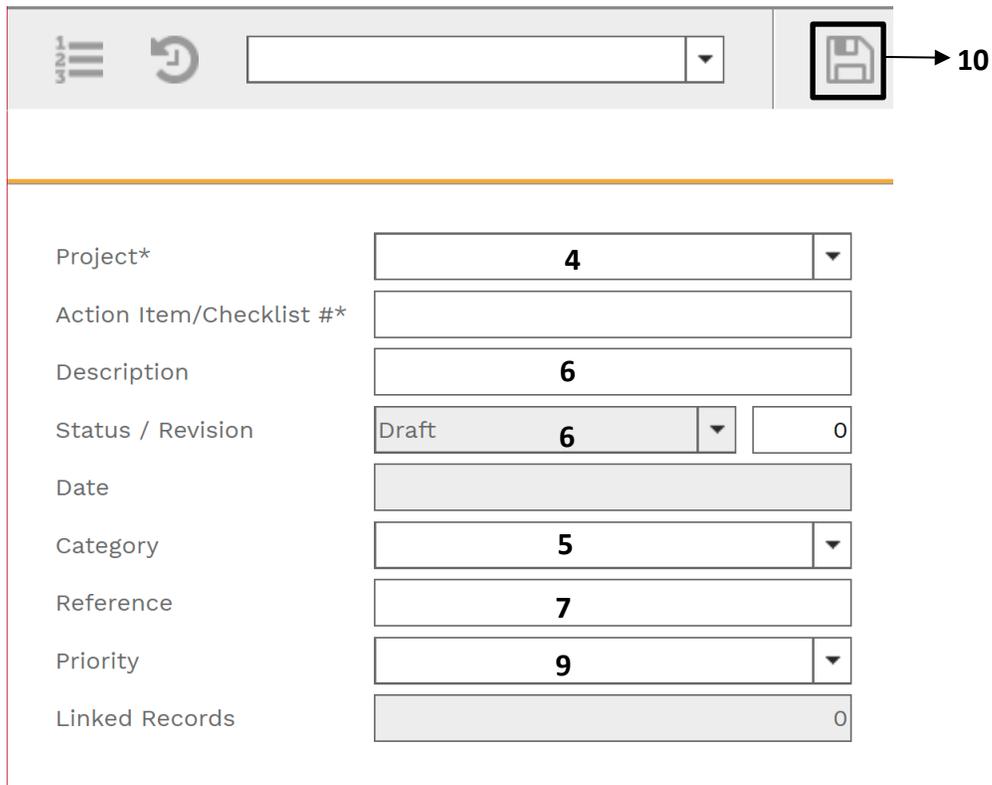
1- Click on **Engineering Forms** from the button on the left menu.



2- Under the Engineering forms tab, click on the **Action Items/Checklist** record.



- 3- Click on **+ Add**.
- 4- **Project** field - Select the project from the dropdown menu
- 5- **Category** field - Select **Checklist, Drawings** or **Task** from the dropdown menu.
- 6- **Description** field - Enter a description related to the category.
- 7- **Reference** field - Enter a reference text related to the category.
- 8- **Status** field - Leave in draft until folder is completely updated.
- 9- **Priority** field - Select from the dropdown menu.
- 10- From the top bar, click on the icon  to save the header.



The screenshot shows a software interface. At the top, there is a grey header bar containing a menu icon (1, 2, 3), a refresh icon, a search input field, and a save icon (floppy disk) which is highlighted with a black box and an arrow pointing to the number 10. Below the header bar is a form with the following fields:

Project*	<input type="text" value="4"/>
Action Item/Checklist #*	<input type="text"/>
Description	<input type="text" value="6"/>
Status / Revision	<input type="text" value="Draft"/> <input type="text" value="6"/> <input type="text" value="0"/>
Date	<input type="text"/>
Category	<input type="text" value="5"/>
Reference	<input type="text" value="7"/>
Priority	<input type="text" value="9"/>
Linked Records	<input type="text" value="0"/>

11- Lower tab - - Based on the category picked in the header, either complete a checklist or enter a task.

- a. **Checklist** - Double click on the first line item. Select the dropdown menu defaulted to N/A & choose based on the specific question asked. Then update the record by clicking on the **Update Record** button located in the menu.

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

LINE #	ATTACHMEN	COMPLETE?	DESCRIPTION	DATE COMPLETED	PROJECT TEAM
11 A	N/A				

No records to display.

12- Notes tab – Click the **+ Add** button to add notes.

MAIN NOTES ATTACHMENTS

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

Edit **+ Add** Delete Refresh Layouts

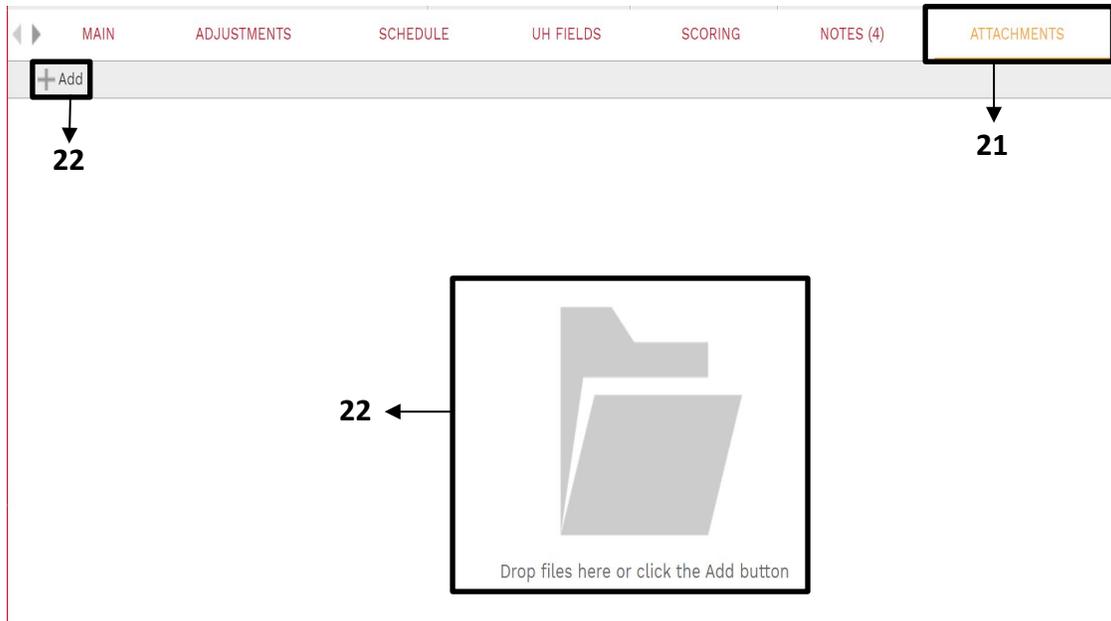
ITEM	DESCRIPTION	CREATED BY	CREATED DATE	EDITED BY	EDITED DATE

No records to display.

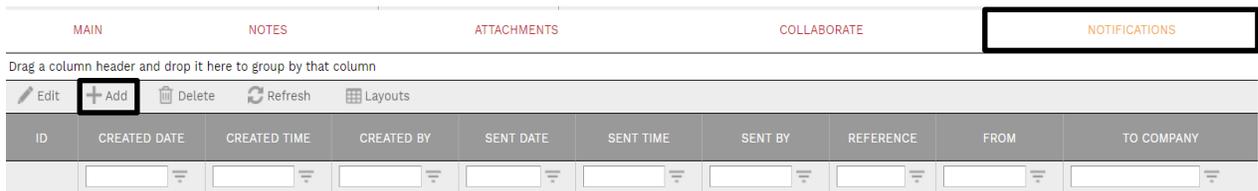
13- Click on the  Button.

14- Click on the **Attachments tab** at the top navigation bar.

15- Drag and drop the file you want to upload or click the **+Add button**.



16- Under “Notifications” tab, click **+Add**.



- 17- Status** field – Select from drop down menu.
- 18- Notification type** field – Select from drop down menu.
- 19- Reference** field – Enter brief description.
- 20- Due Date** – Enter desired date and time.
- 21- Reminder Completed** – Click.
- 22- Completed Date** – Select desired date and time.
- 23-** Within the **“Select To Attach To Email”** box, click on the desired files to include in the email notification.
- 24-** Click on **“Save”** icon in the top bar of window.

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NOTIFICATION

From: Khizer Ali System

To:

CC:

BCC:

Manual CC:

Subject: PMWeb Notification: Meeting Minutes 001 - Nick Merry Test -

Status: **20**

Due Date: **23** 01-03-2023 12:00 PM

Notification type: **21**

Reminder: **24**

Reference: **22**

Completed: **24**

Include Link:

Completed Date: → 25

SELECT TO ATTACH TO EMAIL

<input type="checkbox"/>	TYPE	DESCRIPTION
<input type="checkbox"/>	Report	Assigned Meeting Minutes Dunning Letter
<input type="checkbox"/>	Report	Meeting Minute Details
<input type="checkbox"/>	Report	Meeting Minutes Dunning Letter

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25- Process Complete