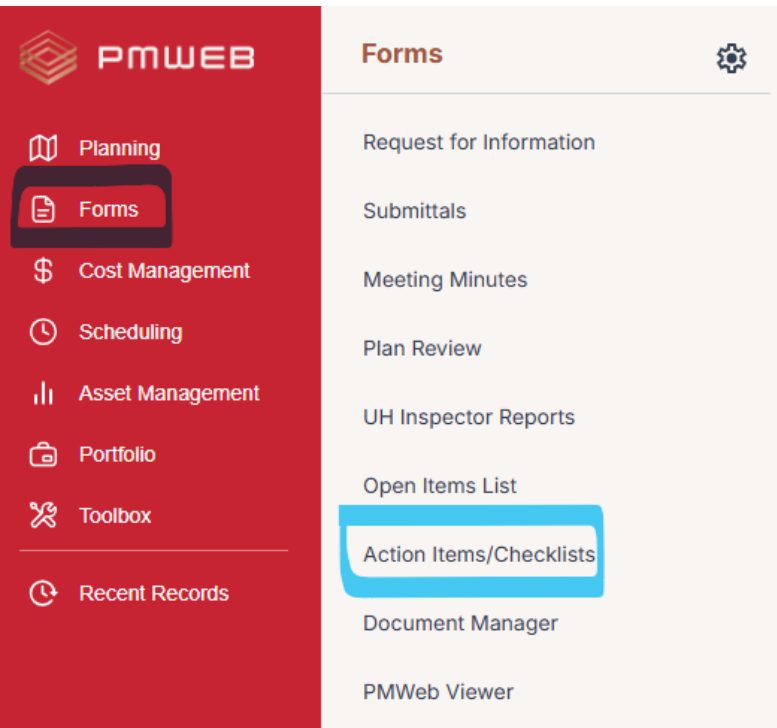




PMWeb Quick Reference

Red Zone Process

1. Click on **FORMS** from the menu on the left and select **Action Items/Checklists**.



2. Click **New Record**.

Action Items/Checklists Manager

Manage, edit, and view your Action Items/Checklists

Recently Viewed ▾

All Action Items/Checklists

Group by: Category ▾

Layout: Action Items - Standard ▾

New Record

Export

Record #	Project Name	Description	Priority	Status	Created By	Create Date
Category:						
001	S000060 - Core Renovations - C...			Draft	Nick Merry	08-21-2025

3. **Project** field – Select the project from the drop-down menu. You can start typing the name/project number to narrow the search.
4. **Action Item/Checklist #** field – This will auto populate with the next sequential number after the project is selected. You can change the # if desired.
5. **Description** field – Enter 'RED ZONE CHECKLIST'
6. **Category** field – Select 'Red Zone' from the dropdown menu
7. **Priority** field - Optional
8. **Reference** field – Optional
9. Click **Save** to create the new record.

Action Items/Checklists (New) Cancel **Save**

Main

Header Fields

Project* **3** Action Item/Checklist # **4** Description **5** Category **6** Date

Priority **7** Reference **8** Status Draft Revision 0 User Assigned

User Due Date

10. The details section will be used to post the initial and updated Red Zone checklists.
11. Under the Details drop down, select the '**Default – Red Zone**' Layout.
12. Select '**New Line**' to add a row.

Details

Group by: None Layout: Default - Red Zone **New Line** Export To Excel

Line #	Attachme...	Description	Notes
No records available.			

0 - 0 of 0 << < > >> 20 Rows

13. Enter an appropriate **description** and a date i.e. 'Red Zone Checklist initial draft – 4/14/2023'. Then click **Save**.

Details

Group by: None Layout: Default - Red Zone

Cancel Save

Line #	Attachme...	Description	Notes
0	(0)		

No records available.

14. To attach the checklist, click on the **(0)** link under the attachments column on the line you just created.

Details

Group by: None Layout: Default - Red Zone New Line

Line #	Attachme...	Description	Notes
1	(0)	Red Zone Checklist initial draft - 4/14/2023	

1 - 1 of 1

<< < 1 > >>

20 Rows

15. Drag and drop files into the **green box** or **click to add** and then **Save and Exit**.

VIEW ATTACHMENTS

Drop files here or click to add

ATTACH FROM DOCUMENT MANAGER

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

Delete Save Layout Load Default Layout

LINKED LINE	DESCRIPTION	FILE	SIZE

No records to display.

1 PAGE SIZE 20

16. To distribute the Red Zone Checklist, navigate to the **Notifications** tab and click on **New Line**.

The screenshot shows a 'Notification' dialog box with a title bar containing a maximize icon and a close button. Below the title bar are three tabs: 'Message', 'Attachments (1)', and 'Options'. The 'Attachments (1)' tab is highlighted with a blue rounded rectangle. The main content area contains a table with three columns: 'Select', 'Type', and 'Description'. The first row has an unchecked checkbox, 'Report', and 'Action Items Form'. The second row has a checked checkbox (highlighted with a blue rounded rectangle), 'Attachment', and 'TMC 701 Arch Floor Plans - no SF'. At the bottom right, there is a status bar showing '1 Selected', a 'Cancel' button, and a 'Save' button (highlighted with a blue rounded rectangle).

Select	Type	Description
☐	Report	Action Items Form
☒	Attachment	TMC 701 Arch Floor Plans - no SF

1 Selected | Cancel | Save

19. For future distribution, the Notification can be edited and resent. A new Notification is not required.

20. Process Complete.