

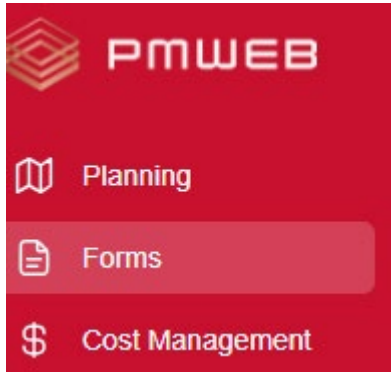
PM

Create an Open Item List

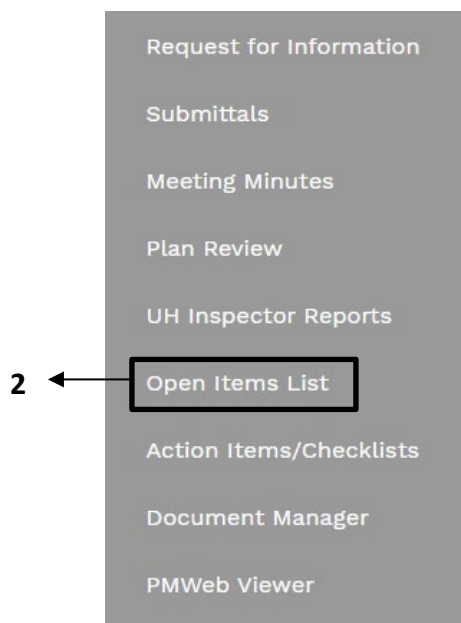
Overview: This record allows a Team member to document items found during a project site visit.

Reference: n/a

1- Click on **Engineering Forms** from the buttons on the left.



2- Click **Open Items List**



- 3- Click on the New Record button.
- 4- **Project** field - Select the project from the Project drop down menu. You can also start typing the name of your project in the field and it will come up.
- 5- **Open Item #** will automatically populate.
- 6- **Description** field - Enter a brief descriptive explanation of the open item.
- 7- **Status** field – Leave as 'Draft'.
- 8- **Category** field – select applicable category.
- 9- **Priority** field – select '03 Routine'.
- 10- **Reference** field – Leave blank.
- 11- From the top bar, click on the save icon.
- 12-

Header Fields

Project*	Phase	Open Item #*	Description	Submittal Type
M001037 - M001037 - Hilton & Re...		002	field report	:
Category	Date	Reference	CSI Code	From
Inspector Walk				:
To	Priority	Status	Revision	User Assigned
:	03 - Routine	Draft	0	

13- A lower tab will appear.

14- Click the  **Add** **button.**

15- Description field - Enter a brief descriptive explanation of the open item.

16- Location – Enter room number or floor

17- Category field – select applicable category.

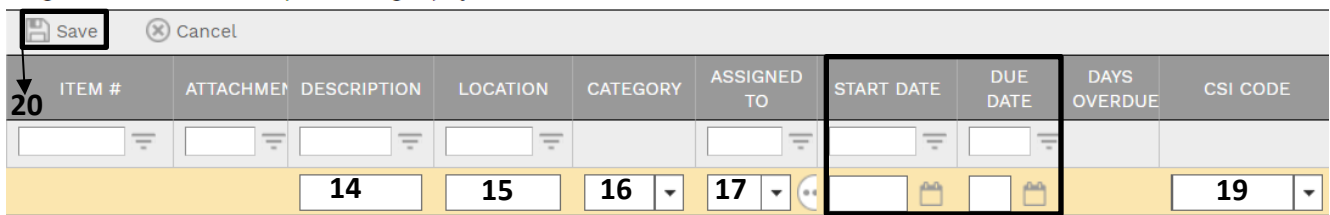
18- Assign to – select appropriate contact

19- Enter Start and Due Dates as applicable

20- Select CSI Code if applicable

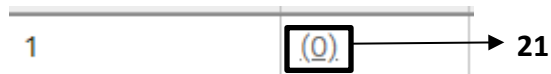
21- Click Save

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



ITEM #	ATTACHMENT	DESCRIPTION	LOCATION	CATEGORY	ASSIGNED TO	START DATE	DUE DATE	DAYS OVERDUE	CSI CODE
		14	15	16	17				19

22- Under the Details button, Hit  to add **Attachments** - Example: Inspector A/E Walk report.

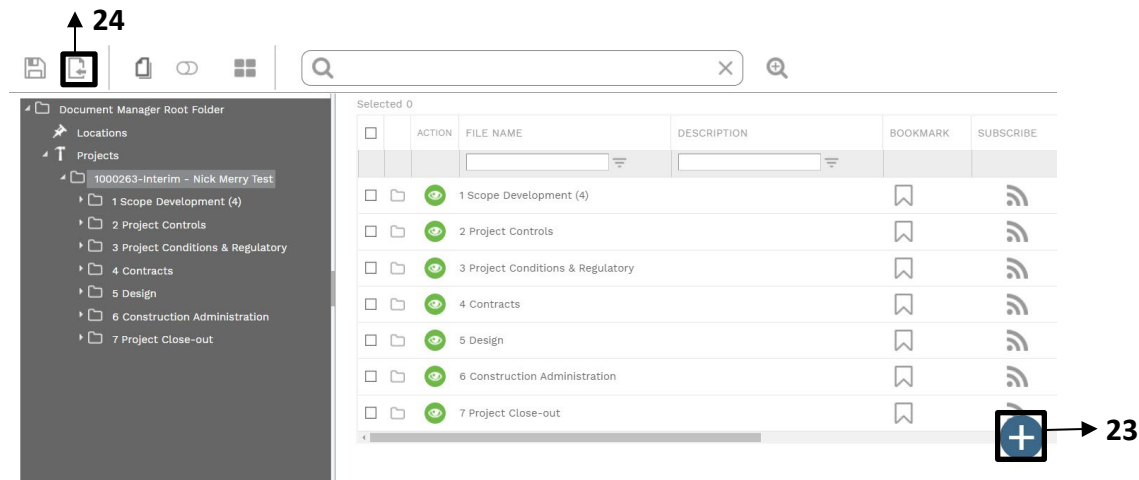


1

23- Click on the + icon to upload files.

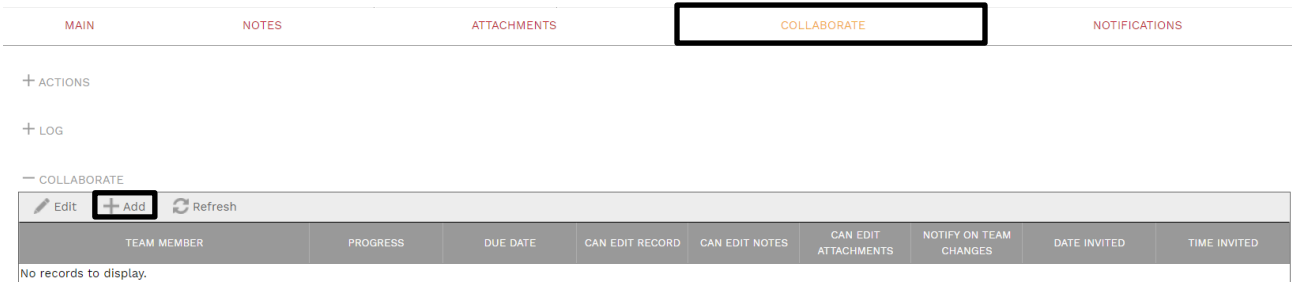
24- Drag and drop files to be added.

25- Click **Save and exit**.



26- Click on “**Collaborate**” tab at the top navigation bar.

27- Click **+Add**.



- 28- Pop up window select **Request Collaboration** to invite others.
- 29- Select applicable options
- 30- In the message box provide further comments as necessary.
- 31- Click the **Save and exit** button.

30 ←

REQUEST COLLABORATION

Submitter

kali27 - Khizer Ali

Request Collaboration

27

Can Edit Record

Can Edit Notes

Can Edit Attachments

Notify On Team Changes

Due Date

01-06-2023

Message

29

32- In “Actions” I

33- Click the Save

TEAM PROGRESS

TEAM MEMBER

PROGRESS

No records to display.

Nick Merry Test - 1 -

MAIN

NOTES

ACTIONS

ACTION

COMMENT

REVIEW COMPLETE

SAVE

31

32

e.