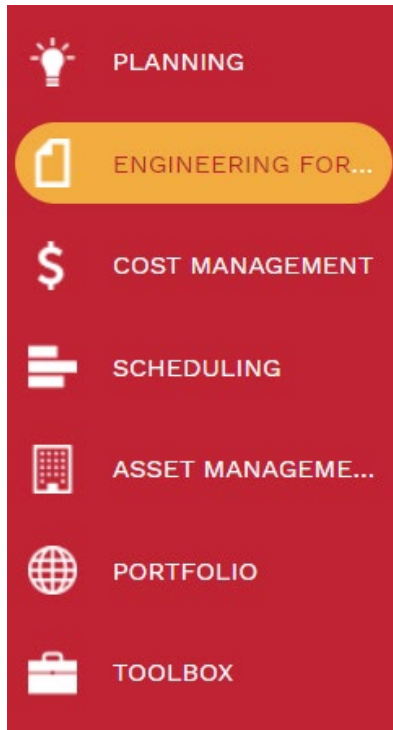




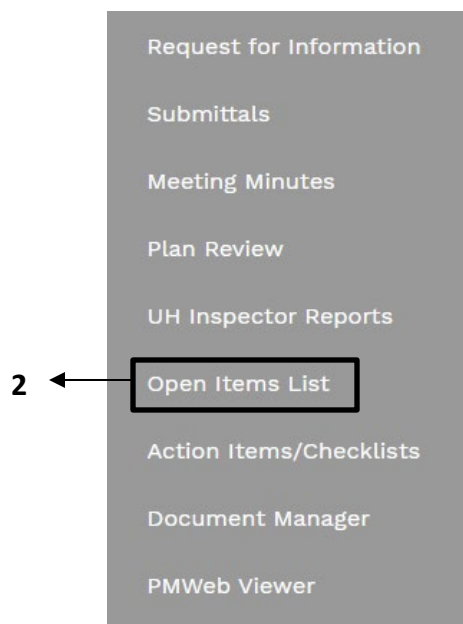
PM



Create an Open Item List

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



2- Click **Open Items List**



- 3- Click on  in the top bar.
- 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  icon to save the header.

Project*	4	▼
Open Item #*	5	
Description	6	
Status / Revision	Draft 7	▼
Category	8	▼
Priority	9	▼
Reference	10	

12- A **lower tab** will appear.

13- Click the **+ Add** button.

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

15- **Location** – Enter room number or floor

16- **Category** field – select applicable category.

17- **Assign to** – select appropriate contact

18- Enter **Start** and **Due** Date

19- Select **CSI Code**

20- 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

21- Under the **Details** button, Hit [\(O\)](#) to add **Attachments** - Example: Inspector A/E Walk report.

1	(O)
---	-----

22- Click **+ Document Manager**.

VIEW ATTACHMENTS

Drop files here or click to add

ATTACH FROM DOCUMENT MANAGER

23- Click on the + icon to upload files.

24- Click Save and exit.

24

Document Manager Root Folder

- Locations
- Projects
 - 1000263-Interim - Nick Merry Test
 - 1 Scope Development (4)
 - 2 Project Controls
 - 3 Project Conditions & Regulatory
 - 4 Contracts
 - 5 Design
 - 6 Construction Administration
 - 7 Project Close-out

Selected 0		ACTION	FILE NAME	DESCRIPTION	BOOKMARK	SUBSCRIBE
<input type="checkbox"/>						
<input type="checkbox"/>	Folder		1 Scope Development (4)			
<input type="checkbox"/>	Folder		2 Project Controls			
<input type="checkbox"/>	Folder		3 Project Conditions & Regulatory			
<input type="checkbox"/>	Folder		4 Contracts			
<input type="checkbox"/>	Folder		5 Design			
<input type="checkbox"/>	Folder		6 Construction Administration			
<input type="checkbox"/>	Folder		7 Project Close-out			

23

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

26- Click +Add.

MAIN NOTES ATTACHMENTS **COLLABORATE** NOTIFICATIONS

+ ACTIONS

+ LOG

COLLABORATE

Edit **+ Add** Refresh

TEAM MEMBER	PROGRESS	DUE DATE	CAN EDIT RECORD	CAN EDIT NOTES	CAN EDIT ATTACHMENTS	NOTIFY ON TEAM CHANGES	DATE INVITED	TIME INVITED
No records to display.								

27- Pop up window select **Request Collaboration** to invite others.

28- Select applicable options

29- In the message box provide further comments as necessary.

30- 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

TEAM PROGRESS

TEAM MEMBER

PROGRESS

No records to display.

31- In “Actions” box, click **“Comment”** or **“Review Complete”** as applicable.

32- Click the **Save** button.

Nick Merry Test - 1 -

MAIN

NOTES

ACTIONS

ACTION

COMMENT

REVIEW COMPLETE

31

SAVE

32