

PM

## How to Collaborate

1- Click on **ENGINEERING FORMS** from the buttons on the left.



2- Under Engineering Forms, select the record to be used to calibrate such as Meeting Minutes or Action Items.



- 3- Select or add the **Project** using the + button.
- 4- Add a Description.
- 5- Add a Location.
- 6- Meeting date is automatically displayed.
- 7- Add Start time.
- 8- Add End Time.

🖹 9- Click the Button on the top bar.

Project*	1000263-Interim - Nick Merry Test 🔻
Туре	•
Record #*	001
Meeting #	1
Description	4
Location	5
Meeting Date	<b>6</b> 01-03-2023 💾
Started	7 (5)
Ended	8
Status / Revision	Draft 🔹 0
NEXT MEETING	
Next Location	
Meet Date	01-03-2023
Start	0

<b>11</b> - Clic	k <b>+Add</b> .		0111.				
MAIN	NOTES ATTACHMENTS COLLABORATE			NOTIFICATIONS			
ACTIONS							
LOG							
COLLABORATE							
🖻 Edit 🕂 Add	C Refresh						
				 CAN EDIT	NOTIFY ON TEAM		7015 000755

- **12-** Pop up window select **Request Collaboration** to invite others.
- 13- Select buttons on left to allow "Editing" of record, notes and attachment.
- 14- Add the Due Date.
- **15-** In the message box provide further comments as necessary.
- 16- Click the Save and exit button.

- I	REQUEST COLLABOR	ATION		s -	□ ×
16 🗲					
	Submitter	kali27 - Khi	zer Ali		
	Request Collaboration	1	.2		•
	Can Edit Record	<b>1</b> 3			
	Can Edit Notes	<b>1</b> 3			
	Can Edit Attachments	13			
	Notify On Team Changes	$\bigcirc$			
	Due Date	14		01-06-2	2023 🛗
	Message	4			
		15	)		
	TEAM PROGRESS				
	TEAM MEMBER		PRO	GRESS	
	No records to display.				

17- 18-	In "Actions" box Click the <b>Save</b> b	:, click <b>"Comm</b> utton.	ent" or "R	eview Co	mplete"	as applic	able.	
		Merry Test - 1 -	•					
	MAIN	NOTE	S					
	REVIEW COMPLE	TE						
19-	SAVE	] → 18 tions" tab, clio	ck <b>+Add</b> .					
<b>19-</b> MAIN	SAVE Under <b>"Notifica</b> NOTES	] → 18 tions" tab, clic	ck <b>+Add</b> .		COLLABORAT	ε		NOTIFICATIONS

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

То						_		TYF	PE DESCRIPTION
сс								Report	Assigned Meeting Minutes Dunning Lette
200								Report	Meeting Minute Details
BCC								Report	Meeting Minutes Dunning Letter
Manual CC									
Subject	P	MWeb Notification: Meeting Mi	nutes 001 - Nick Mer	rry Test -					*
Status		20	•	Due Date 2	.3 01-03-2023 🗂	12:00 PM 🕓			26
Notification type		21	•	Reminder	⊠ 24				
Reference		22		Completed	<u> </u>				
Include Link		]		Completed Date	مم	0	→	25	
							-		