

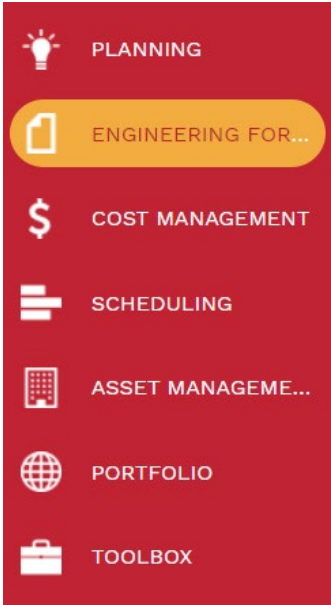
PM

Create an Open Item List

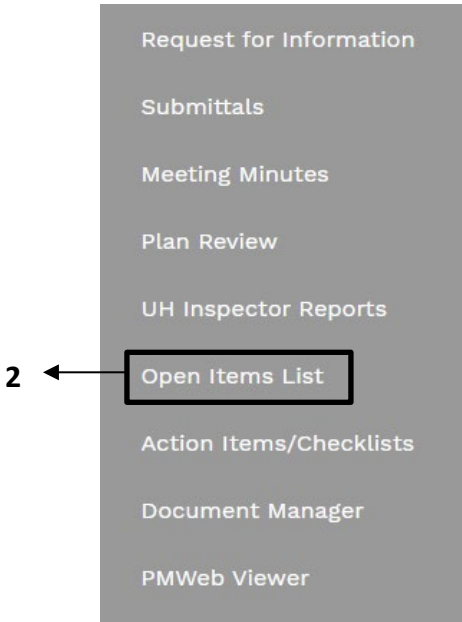
Overview: This record allows a Team member to document items found during a project site visit.

Reference: n/a

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



2- Click **Open Items List**



- 3- Click on in the **+** 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 save icon.

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** Dates as applicable

19- Select **CSI Code** if applicable

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

18

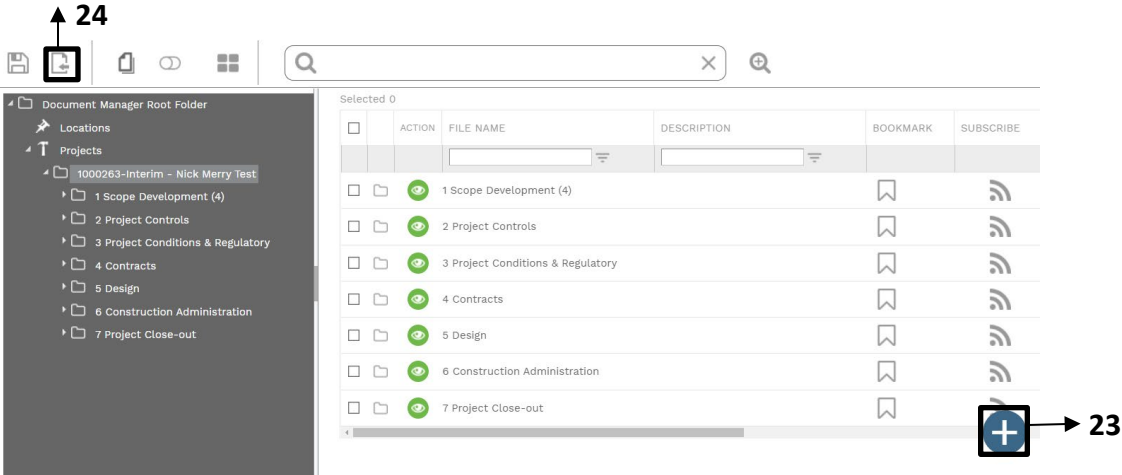
21- Under the **Details** button, Hit [\(O\)](#) to add **Attachments** - Example: Inspector A/E Walk report.

1	(O)
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22- Click on the **+ icon** to upload files.

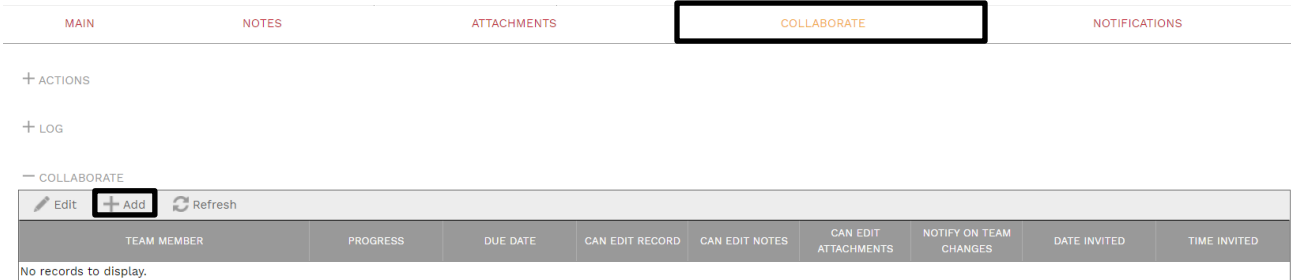
23- Drag and drop files to be added.

24- Click **Save and exit**.



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

26- Click **+Add**.



- 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.

- 31- In "Actions" |
- 32- Click the **Save**

TEAM PROGRESS

TEAM MEMBER	PROGRESS
No records to display.	

e.