



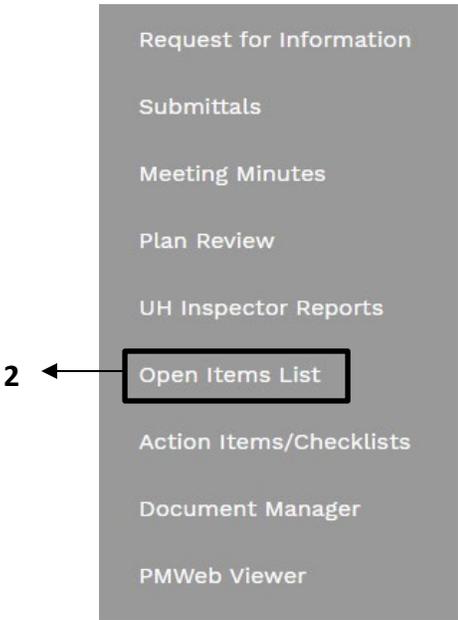
PM

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

18

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

1	(O)
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21

- 22- Click **+ Document Manager**.

VIEW ATTACHMENTS

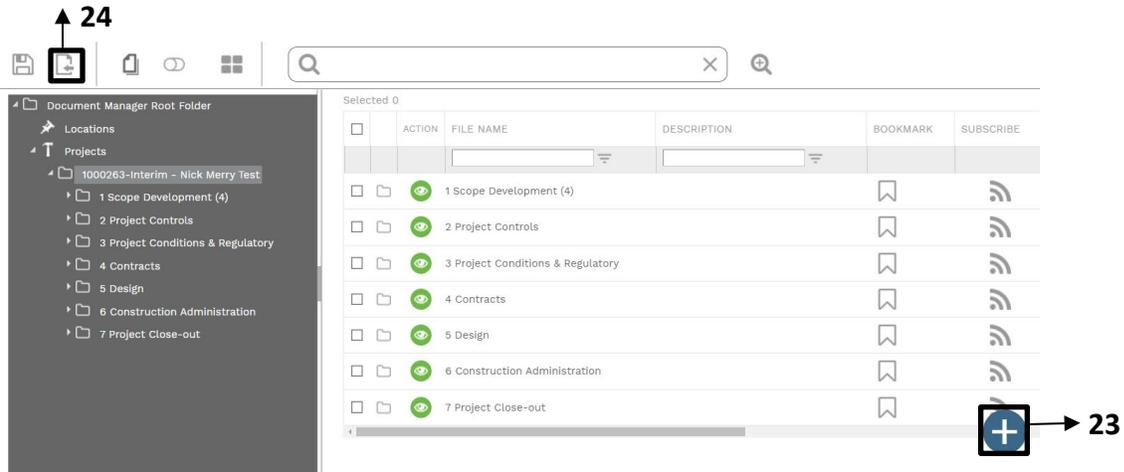
DROPP FILES HERE OR CLICK TO ADD

ATTACH FROM DOCUMENT MANAGER

22

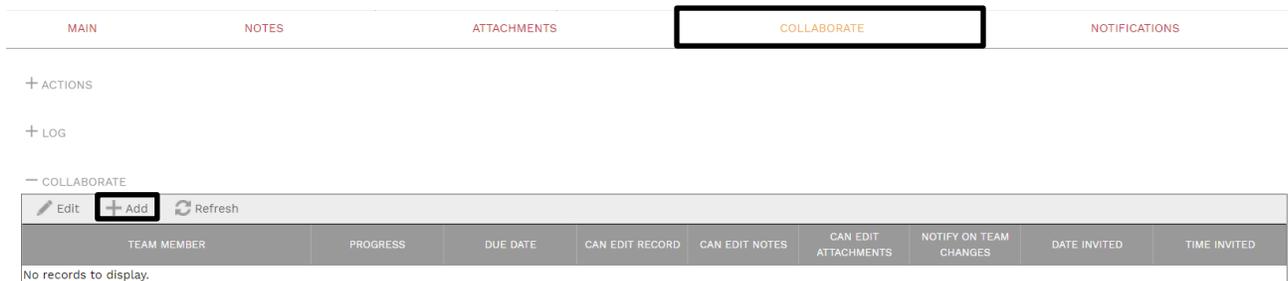
23- Click on the + icon to upload files.

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.

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.

1 2 3

Nick Merry Test - 1 -

MAIN NOTES

ACTIONS

ACTION

COMMENT → 31

REVIEW COMPLETE

SAVE → 32