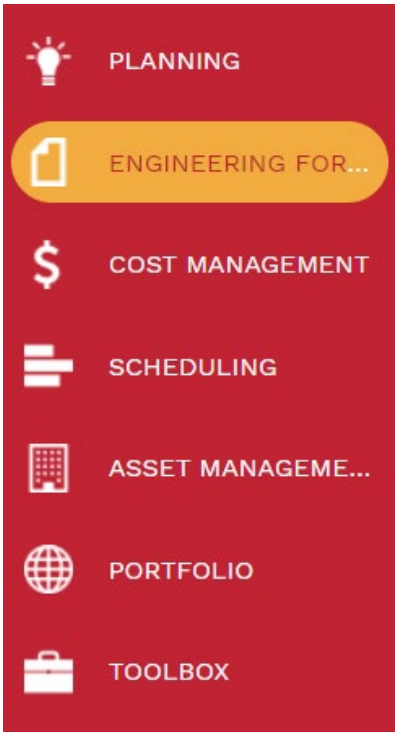
UNIVERSITY of HOUSTON
FACILITIES SERVICES

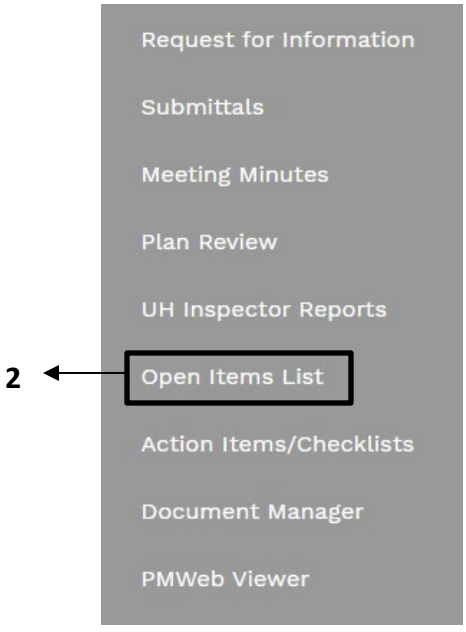
PM

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.

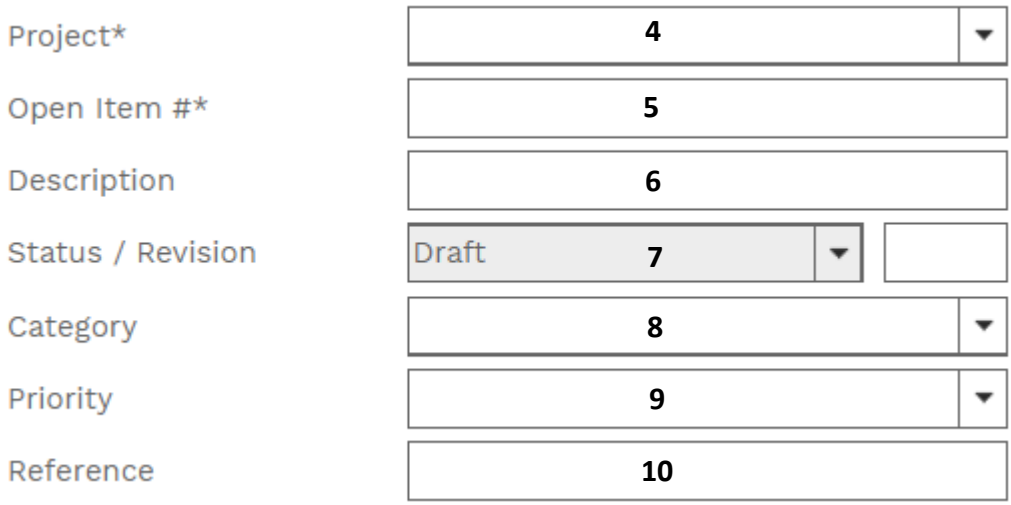
7- **Status** field – Leave as 'Draft'.

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

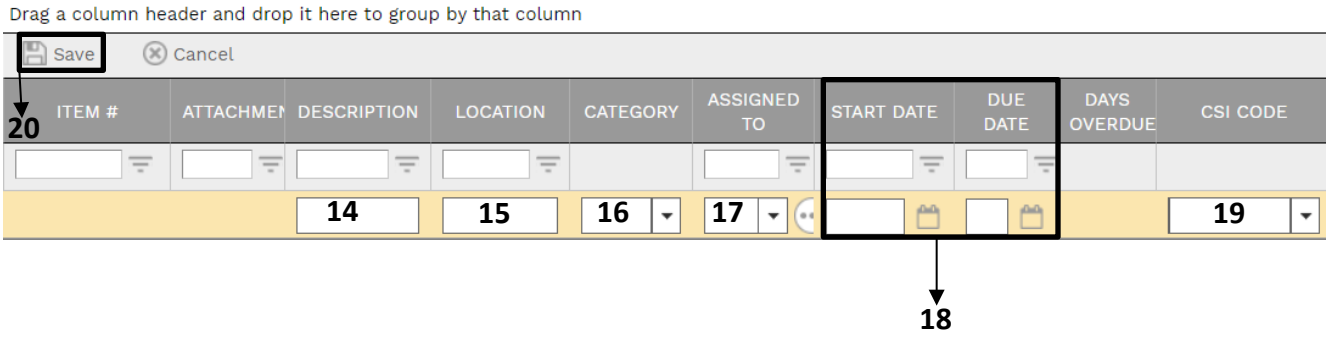
9- **Priority** field – select '03 Routine'.

10- **Reference** field – Leave blank.

11- From the top bar, click on the icon to save the header.

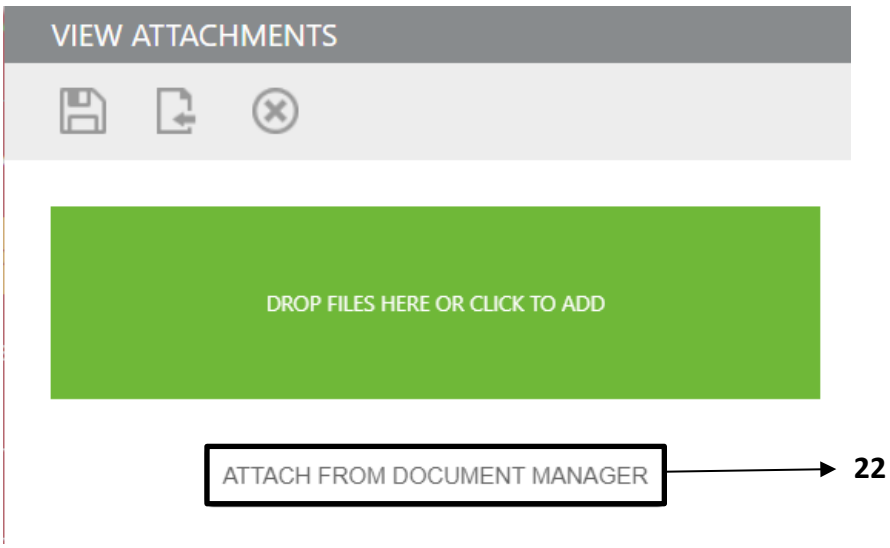


12- A **lower tab** will appear.
13- Click the + Add button.
14- Description field - Enter a brief descriptive explanation of the open item.
15- Location – Enter room number or floor
16- Category field **–** select applicable category**.**
17- Assign to – select appropriate contact
18- Enter **Start** and **Due** Date
19- Select **CSI Code**
20- Click **Save**

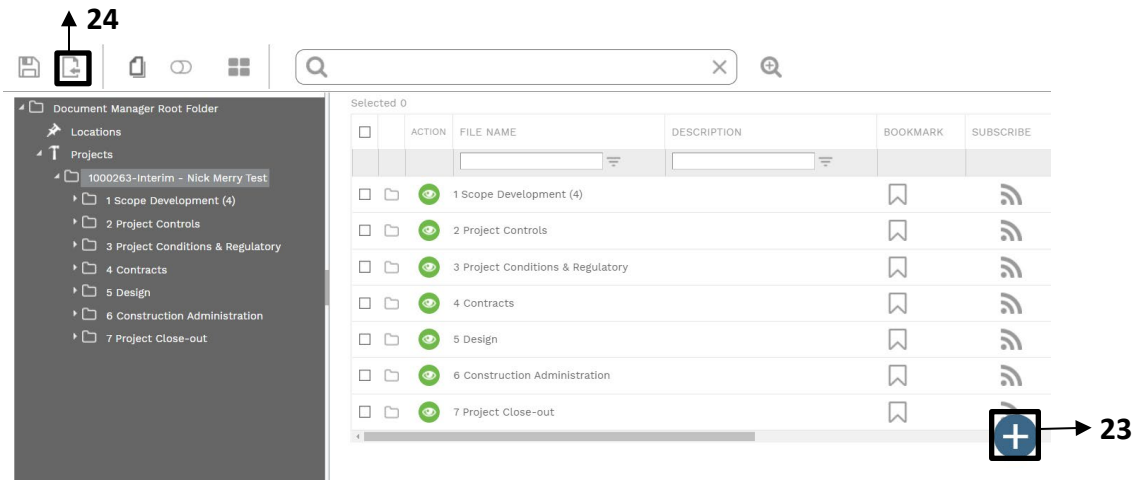


21- Under the **Details** button, Hit (0) to add **Attachments** - Example: Inspector A/E Walk report.

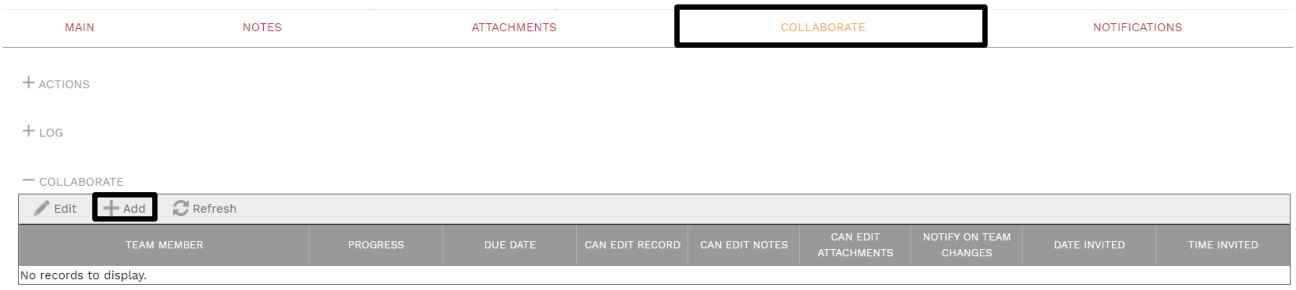
22- Click **+ Document Manager.**



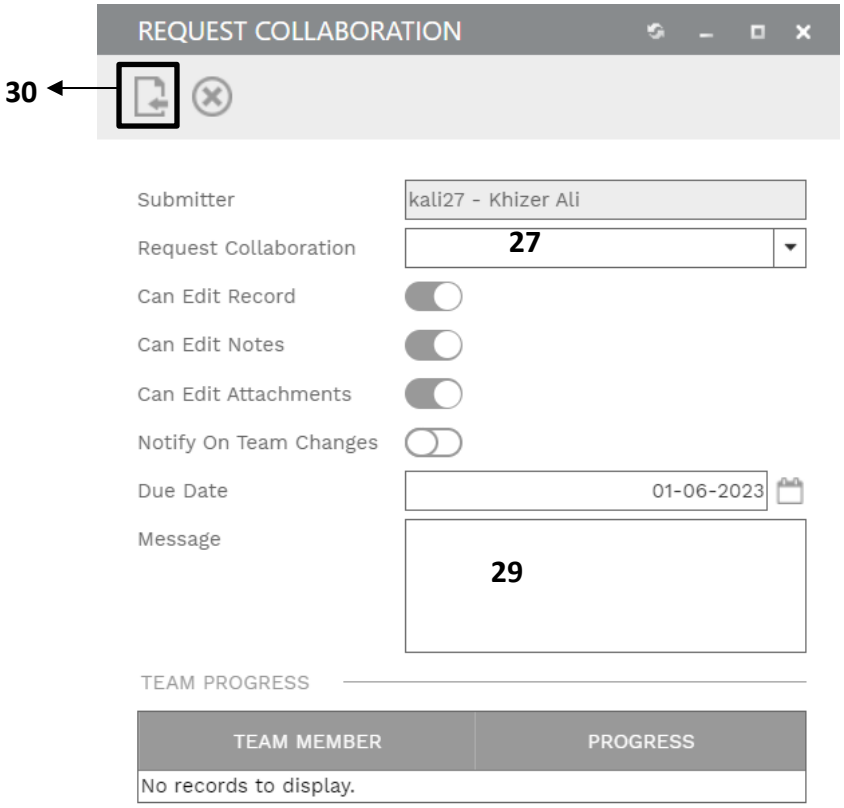
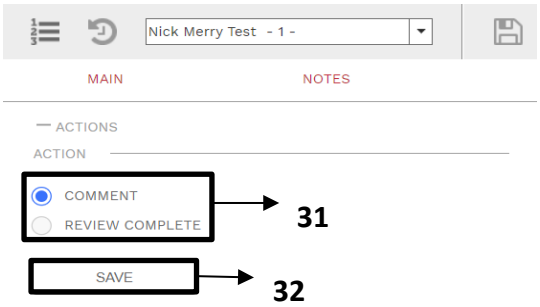
23- Click on the **+ icon** to upload files.
24- Click **Save and exit.**



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.



31- In "Actions" box, click **"Comment"** or **"Review Complete"** as applicable.
32- Click the **Save** button.