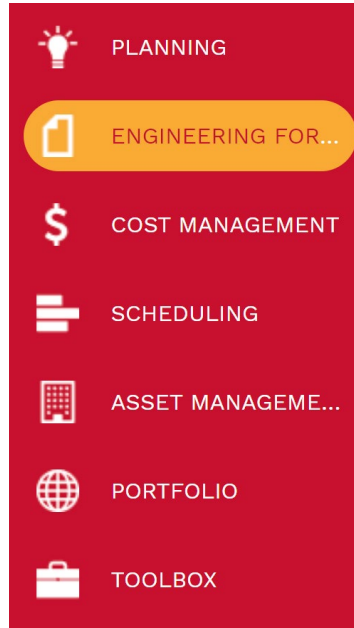




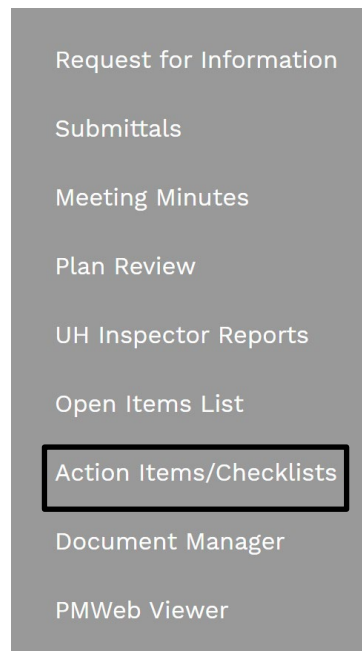
## **PMWeb Quick Reference**


### **Red Zone Process**

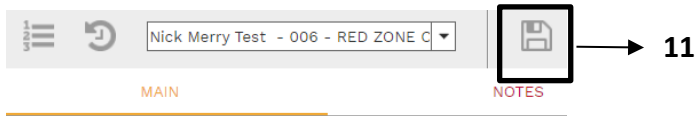
1- Click on **Engineering Forms** from the button on the left menu.



2- Under the Engineering forms tab, click on the **Action Items/Checklist** record.



- 3- Click on + **Add**.
- 4- **Project** field - Select the project from the dropdown menu.
- 5- **Action Item/Checklist #** field – auto populates with next sequential number
- 6- **Description** field - Enter 'RED ZONE CHECKLIST'
- 7- **Status** field - Leave in draft.
- 8- **Category** field - Select '**Checklist – Red Zone**' from the dropdown menu.
- 9- **Reference** field – Optional field.
- 10- **Priority** field – Leave as 'Routine'.
- 11- From the top bar, click on the icon  to save the header.



MAIN NOTES

Nick Merry Test - 006 - RED ZONE C

11

Project*	1000263-Interim - Nick Merry Test	4
Action Item/Checklist #*	006	5
Description	RED ZONE CHECKLIST	6
Status / Revision	Draft 0	7
Date	06-07-2023	
Category	Checklist - Red Zone	8
Reference		9
Priority	03 - Routine	10
Linked Records	0	

**12-** The details section will be used to post updated Red Zone checklists.

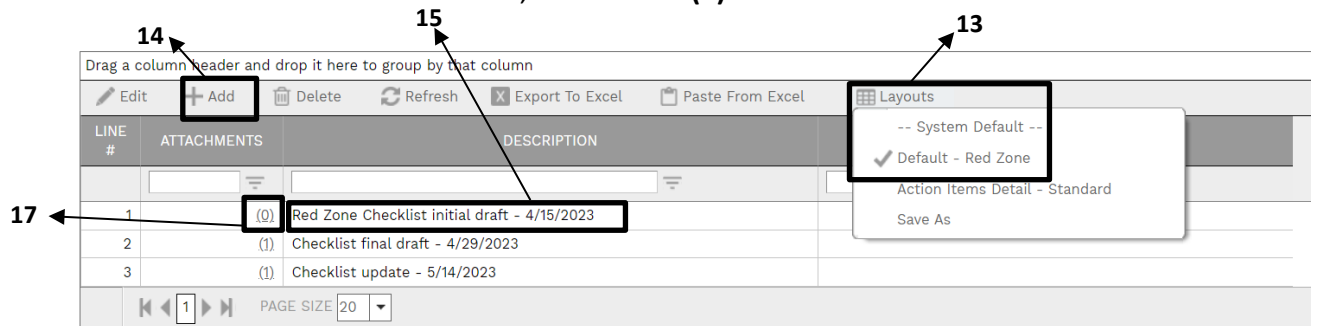
**13-** Under **Layouts**, select the 'Default – Red Zone' layout.

**14-** Select **+Add** to add a row.

**15-** Enter an appropriate description and a date i.e. 'Red Zone Checklist initial draft - 4/15/2023'.

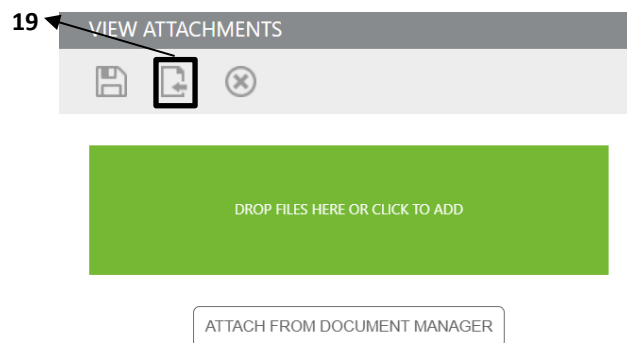
**16-** Click on the  Save button.

**17-** Under the ATTACHMENTS column, click on the **(0)**.



**18-** In the VIEW ATTACHMENTS pop up menu, drag the Checklist to the green **DROP FILES HERE** box.

**19-** Click on the  Save & Exit button.



**20-** To distribute the Red Zone Checklist, under **“NOTIFICATIONS”** tab, click **+Add**.

[illegible]

**21-** In the pop up box, click on the  icons to select **To** and **CC** addressees.

**22- Manual CC field** – utilize to add e-mail addresses for non-PM Web users.

**23- Subject** field – Add a relevant subject line for the e-mail.

**24- Status** field – Leave blank.

**25- Notification type** field – Select from drop down menu if applicable.

**26- Reference field – Optional field.**

**27- Due Date** – Optional field. Enter desired date and time.

**28- Reminder Completed** – Optional field. Click.

**29- Completed Date** – Optional field. Select desired date and time.

**30-** Within the **“SELECT TO ATTACH TO EMAIL”** box, click on the desired file(s) to include in the email notification.

**31-** Click on “**Save**” icon then the “**Send**” icon.

The screenshot shows the PMWeb Notification form with the following numbered callouts:

- 31**: Notification icon in the top bar.
- 21**: To field.
- 22**: Manual CC field.
- 23**: Subject field.
- 24**: Status dropdown.
- 25**: Notification type dropdown.
- 26**: Reference field.
- 27**: Due Date field.
- 28**: Reminder checkbox.
- 29**: Completed Date field.
- 30**: SELECT TO ATTACH TO EMAIL table.

	TYPE	DESCRIPTION
<input type="checkbox"/>	Report	Assigned Meeting Minutes Dunning Letter
<input type="checkbox"/>	Report	Meeting Minute Details
<input type="checkbox"/>	Report	Meeting Minutes Dunning Letter

### 32- Process Complete