
Action Items Quick Reference Guide

This topic provides a reference for the action items.

Purpose

Newforma action items allow the project team to maintain a task list specific to the project which can be easily accessed from inside and outside the office.

Audience

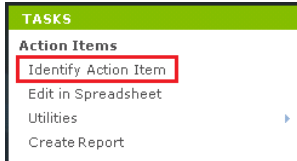
Internal and external project team members.

Key Features

- Internal team members can access project action items from a central list and contribute updates or generate reports from the activity center or remotely through the Info Exchange web site.
- External team members receive email notifications for action items they are involved in and access the items via Info Exchange.
- Any email correspondence, markup or supporting document associated with the action item can be electronically linked to it, providing a permanent connection and audit trail of all related information.

To create a new action item from the activity center

1. In the **Action Items** activity center, select **Identify Action Item** from the **Tasks** panel.



2. In the **Identify Action Item dialog box**, fill in the subject.
3. Select **Assigned To** to open the **Choose a Project Team Member dialog box** and assign the item.
4. Check the box next to **Send Change Notification Email** to notify team members that they are assigned to the action item.
5. Select **Create** to create the action item.

*If the **Send Change Notification Email box** is checked, Newforma creates a notification email for you to review and send. Look for the Microsoft Outlook icon flashing in the Windows toolbar indicating the email is ready to send. Click **Send and File in Action Item** to send the email and file it on the **Email Log** tab.*

Identify Action Item

Subject: Select lighting

Type: Action Item Action Item ID: Auto Number

Status: Not Started Priority: Normal

Percent Complete: 0%

Assigned: Thursday, May 29, 2014 Assigned To: [User Name]

Due Date: No Due Date Remind 2 days before due

Action Completed: No Date

Disciplines: CC: Assigned By:

Description Discussion Email Log (0) Supporting Documents (0) Related Items (0) Change Log

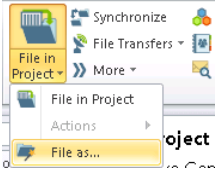
Keywords:

Send change notification email Create Cancel Help

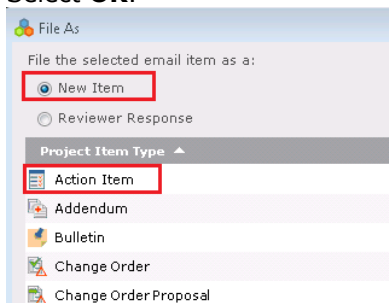
To create a new action item from Outlook

You can create action items directly from an email message.

1. In Outlook, highlight the email you want to file as an action item, then select the drop-down arrow for the **File in Project** button in the **Project Center Add-In for Microsoft Outlook** toolbar. Select **File As** from the drop-down menu.



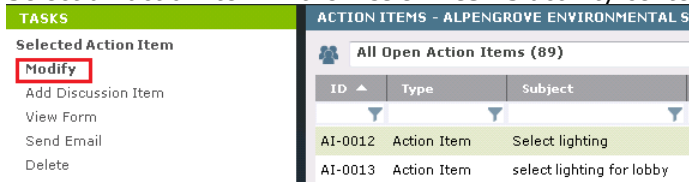
2. In the **Select Project dialog box**, double-click on the corresponding project to select it.
3. In the **File As dialog box**, select the **New Item** radio button and **Action Item** from the **Project Item Type** list. Select **OK**.



4. The **Identify Action Item dialog box** appears. Note that the information from the email has been pulled in, saving data entry time. The email is logged with the action item and any files attached to the email appear on the **Supporting Documents** tab. Modify any information as needed following the instructions above and select **Create** to save.

Modify / update action item

1. Select an action item in the **Action Items** activity center and select **Modify** in the **Tasks** panel.



2. Update any information in the **Modify Action Item dialog box** as needed. For example, change the **Status** or add information on the **Description** tab. Select the **Send Change Notification Email** checkbox to notify the person who assigned the action item of any changes. Select **OK** to save.

The screenshot shows the 'Modify Action Item' dialog box. The 'Status' dropdown is highlighted in a red box and set to 'Not Started'. The 'Description' tab is also highlighted in a red box. The 'Send change notification email' checkbox is checked and highlighted in a red box. The dialog box contains the following fields and options:

- Subject: Select lighting
- Type: Action Item
- Action Item ID: AI-0012
- Status: Not Started (dropdown menu open showing options: Not Started, In Progress, Waiting on Someone Else, Completed, Deferred, Action Complete)
- Priority: Normal
- Disciplines: (empty field)
- Assigned To: (empty field)
- CC: (empty field)
- Assigned By: (empty field)
- Due Date: (empty field)
- Action Completed: No Date
- Description tab (highlighted in red)
- Keywords: (empty field)
- Send change notification email: (highlighted in red)
- Buttons: OK, Cancel, Help

To run an action items report

To run a report of action items from the activity center, follow these steps.

1. Filter the **Action Items** activity center log in whatever way is needed to only see the action items you want in the report. For example, if you want to find action items that are not started, select the filter icon in the **Status** column and check **Not Started**, then select **Filter**.

The screenshot shows the 'ACTION ITEMS - ALPENGROVE ENVIRONMENTAL SCIENCE CENTER (1999009.00)' interface. A dropdown menu is open for the 'Status' column, showing options to 'Include' or 'Exclude' 'In Progress', 'Not Started', and 'Waiting on Someone Else'. The 'Not Started' option is selected. 'Filter' and 'Clear' buttons are at the bottom of the menu.

ID	Type	Subject	Discipline	Priority	Status	Created	Assigned	Assign
AI-0012	Action Item	Select lighting	--	Normal	In Progress			
AI-0013	Action Item	select lighting for lobby	--	Normal	In Progress			
AIA-00...	Building A	Change doors spec	--	High	Not Started			
IN-0001		LEED - Materials and R...	Architectural	High	Waiting on Someone Else			
IN-0002		I just wanted a purple...	--	Normal				
IN-0004		Not good	--	Normal				

2. Next, if you want to add or remove columns, right click over the column headings. Check the columns you want to display and deselect the columns you want to remove from the grid.

The screenshot shows a context menu for column selection. The menu items are: ID, Type, Subject, Discipline, Priority, Created, Assigned, Assigned To, Assigned By, CC, Due Date, Days Overdue, Status, Action Completed, Percent Complete, Closed, and Last Updated. Checkmarks are visible next to ID, Type, Subject, Discipline, Priority, Created, Assigned, Assigned To, Assigned By, CC, Due Date, Days Overdue, Status, Action Completed, Percent Complete, and Closed.

3. You can also drag columns to rearrange them, or click a column header to sort.

The screenshot shows the report table with a red arrow pointing to the 'Priority' column header. The table data is as follows:

ID	Type	Subject	Discipline	Priority	Status
AI-0007	Action Item	Weekly status update	--	High	Not Started
AI-0011	Action Item	This action item	--	High	Not Started
IN-0001		LEED - Materials and R...	Architectural	High	Not Started
0007	Reaction Item	Will it stay	--	Normal	Not Started

4. Once you have filtered and arranged columns as needed, select **Create Report** in the **Tasks** panel.

The screenshot shows the 'TASKS' panel with the following options: Selected Action Item, Modify, Add Discussion Item, View Form, Send Email, Delete, Add Similar Action Item, Action Items, Identify Action Item, Edit in Spreadsheet, Utilities, and Create Report. The 'Create Report' option is highlighted with a red box.

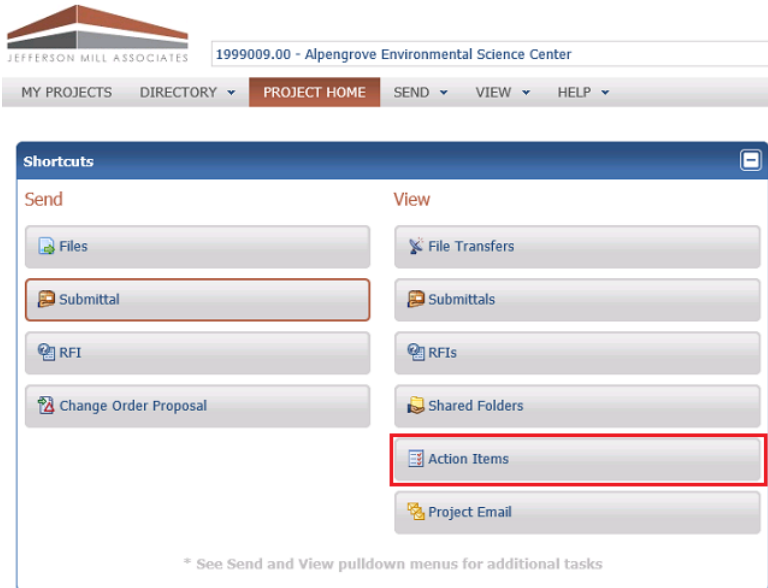
5. In the **Create Report dialog box**, review the options on the **Report Type** tab and modify anything as needed. Select the type of output you want. Select the **Formatting** tab to set other options as desired, then select **OK** to generate the report.


The screenshot shows the 'Create Report' dialog box with the 'Report Type' tab selected. The dialog has two tabs: 'Report Type' and 'Formatting'. Under 'Report Type', there are two radio buttons: 'Log Report' (selected) and 'Specialized Report'. Below these is a dropdown menu. The 'Title' field contains 'Action Item Report - All Open Action Items'. The 'Author' field is empty, and the 'Date' field is set to '5/29/2014'. There are seven radio button options for output format: 'Send report in an Email', 'Display report in a browser', 'Export report to Microsoft Excel' (selected), 'Export report to Microsoft Word', 'Export report to PDF', and 'Print report'. At the bottom, there is a checkbox for 'Save Report in Project Folder' and a file path: 'C:\Users\awhitney\AppData\Local\Temp\NewformaReport_2014_05_29_17.00.54.xlsx'. The dialog has 'OK', 'Cancel', and 'Help' buttons at the bottom.

To view action items on Info Exchange

Both internal and external project team members can add and/or update action items from the Info Exchange website.

1. Log into the Info Exchange website and select the project. In the **Project Home page Shortcuts View** section, select **Action Items** (you can also select **View > Project Information > Action Items** from the menu bar).



2. To update or modify an action item, select the  button to the left of the action item. Add or change any information as needed. Any changes are updated automatically in Project Center.

Action Items						
Due Date	ID	Subject	Related Items	Assigned To	Assigned By	Priority
	AI-0013	select lighting for lobby				Normal
	AI-0012	Select lighting				Normal

3. To add a new action item, select **Add Action Item** in the **Action Items log**. Fill out the information in the **Add Action Item** dialog box as desired.

The screenshot shows the 'Action Items' section with a dropdown menu set to 'Open' and an 'Add Action Item' button highlighted with a red box. Below the button is a table with columns: 'Due Date', 'ID', 'Subject', and 'Related Items'. The table contains one row with ID 'AI-0013' and subject '[select lighting for lobby](#)'.

4. If you assigned the action item to someone, select the **Send Change Notification Email** checkbox to notify the team members assigned. Select **Save and Close** to create the action item.
5. At the **Send Email** dialog box, fill out any additional information and select **Send**.