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

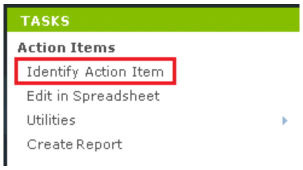
Internal and external project team members.

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.

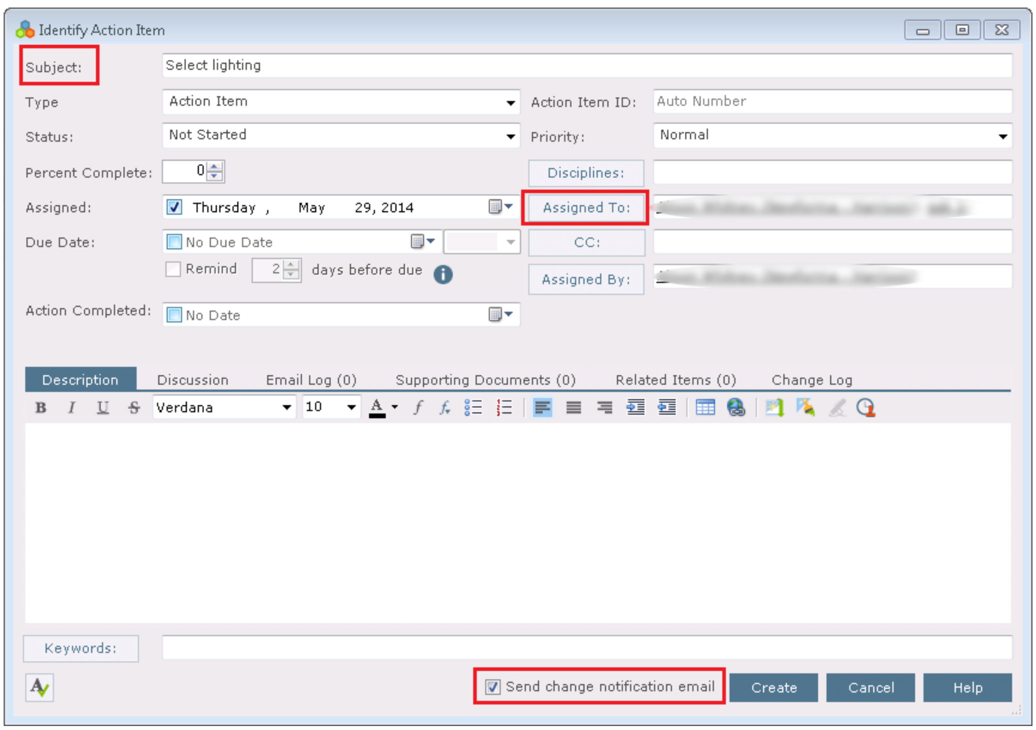
To create a new action item from the activity center

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.

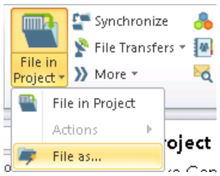
*If the **Send Change Notification Email box** is checked, Newforma creates a notification email for you to review and send. Look for the Microsoft Outlook icon flashing in the Windows toolbar indicating the email is ready to send. Click **Send and File in Action Item** to send the email and file it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



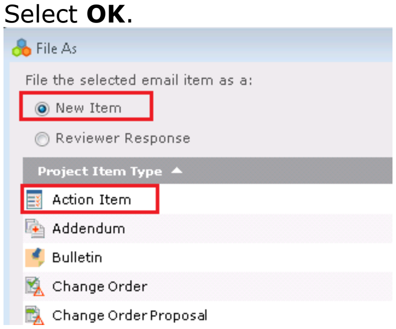
To create a new action item from Outlook

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.



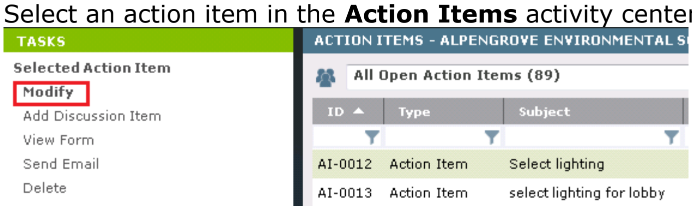
2. In the **Select Project dialog box**, double-click on the corresponding project to select it.
3. In the **File As dialog box**, select the **New Item** radio button and **Action Item** from the **Project Item Type** list. Select **OK**.



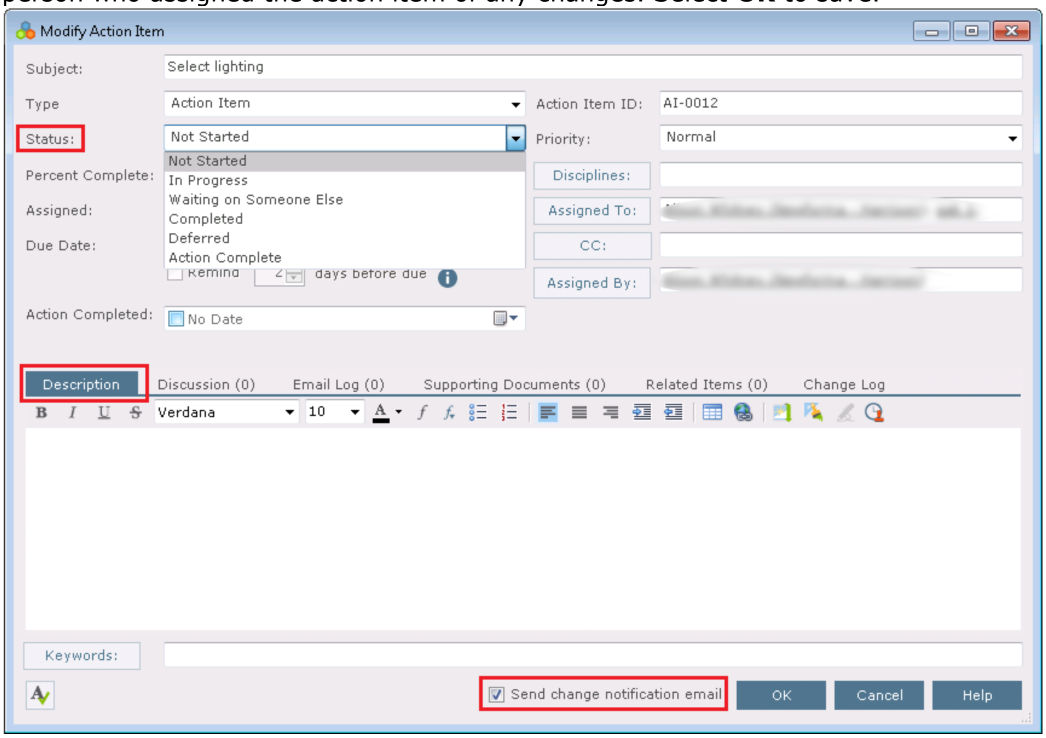
4. The **Identify Action Item dialog box** appears. Note that the information from the email has been pulled in, saving data entry time. The email is logged with the action item and any files attached to the email appear on the **Supporting Documents** tab. Modify any information as needed following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



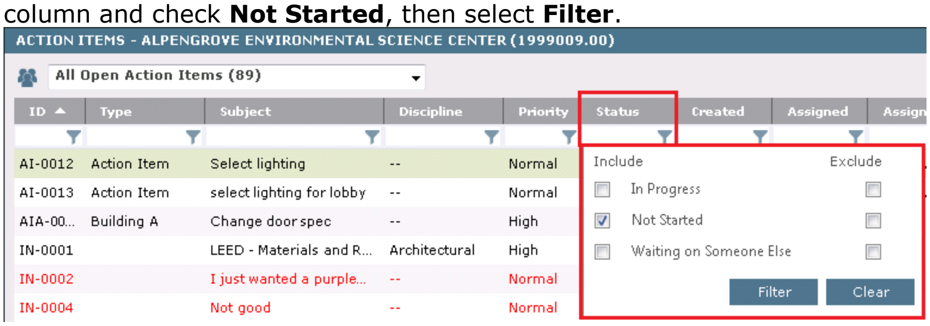
2. Update any information in the **Modify Action Item dialog box** as needed. For example, change the **Status** or add information on the **Description** tab. Select the **Send Change Notification Email** checkbox to notify the person who assigned the action item of any changes. Select **OK** to save.



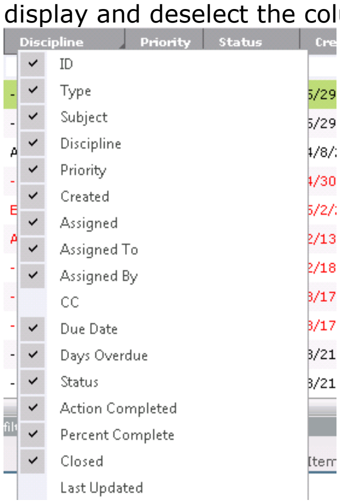
To run an action items report

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

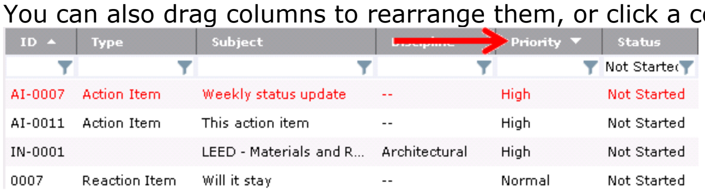
1. Filter the **Action Items** activity center log in whatever way is needed to only see the action items you want in the report. For example, if you want to find action items that are not started, select the filter icon in the **Status** column and check **Not Started**, then select **Filter**.



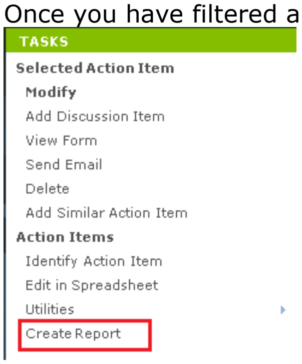
2. Next, if you want to add or remove columns, right click over the column headings. Check the columns you want to display and deselect the columns you want to remove from the grid.



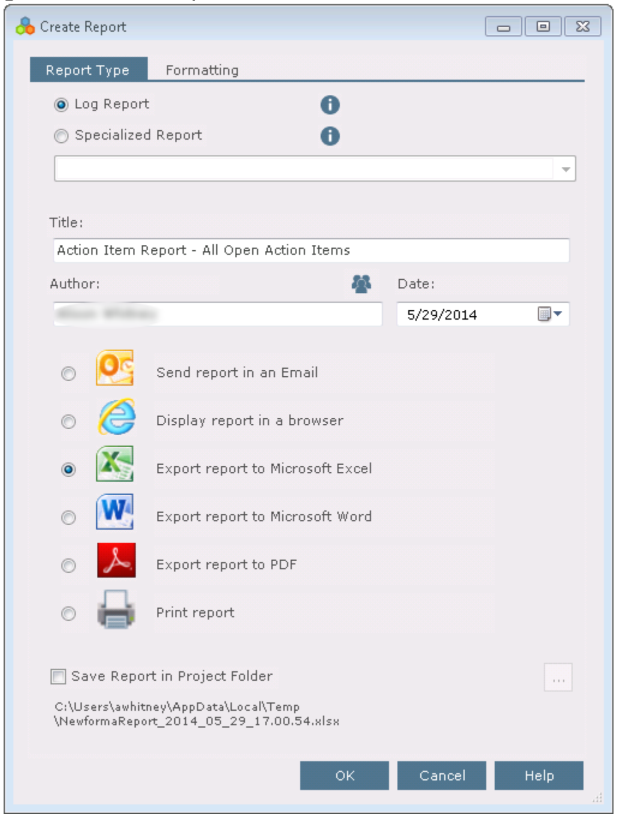
3. You can also drag columns to rearrange them, or click a column header to sort.



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



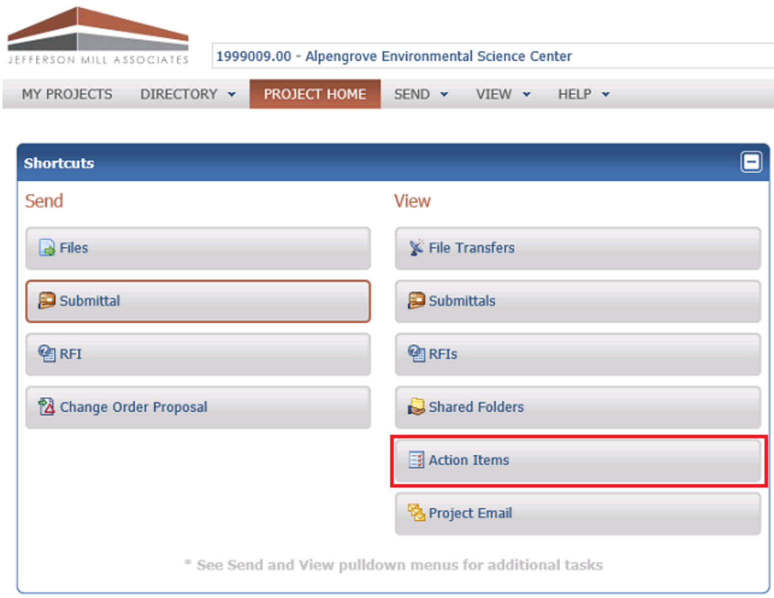
5. In the **Create Report dialog box**, review the options on the **Report Type** tab and modify anything as needed. Select the type of output you want. Select the **Formatting** tab to set other options as desired, then select **OK** to generate the report.



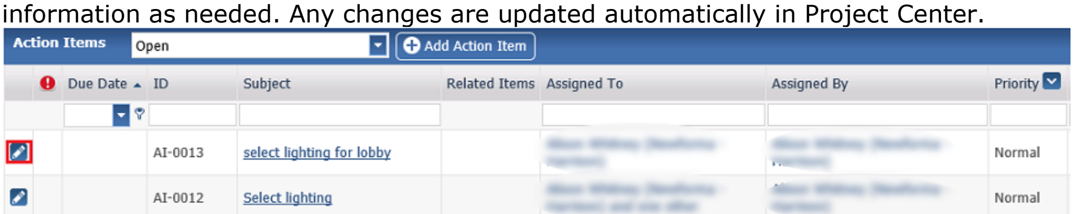
To view action items on Info Exchange

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.



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.

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**.