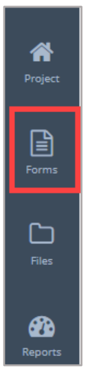
Memos to File

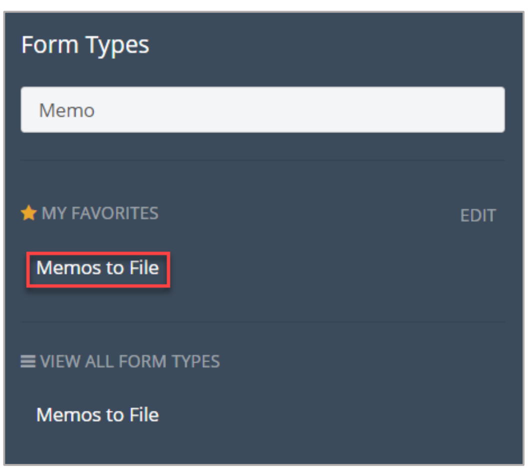
The Memos to File form is used by the internal DGS project team to capture any pertinent information, decisions, discussions or files that have no other specific place within the ProjectTeam system to capture them. Project plans, strategic planning memos or scope planning documents are a few examples of the types of items that can be captured with the Memos to File form. By capturing these types of items within the project they are available for the project record and are searchable and reportable.

Creating Memos to File

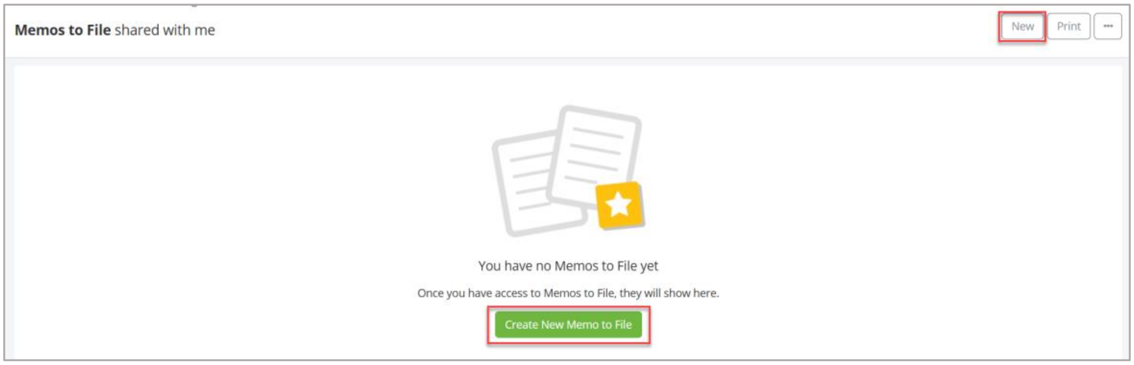
1. Within the project, click the **Forms** icon on the left navigation pane.



2. In the search area of the Form Types, begin typing the word “Memo” and select **Memos to File** form type.

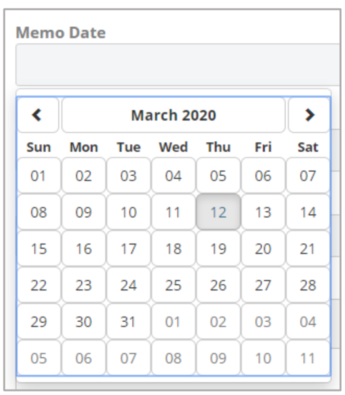


3. Click the Create **Memos to File** button located in the middle of the log or click the **New** button in the upper right corner.



4. Enter a **Subject** for the memo. This should be specific enough to determine what the memo is about.

5. Select a **Memo Date** using the calendar menu.



6. Select the name of the person that the memo is from in the list in the **Memo From** name or enter a new name.

7. Enter a brief description on what the memo is regarding in the **RE:** field. Example; Project Scope or SBI Set-aside determination.

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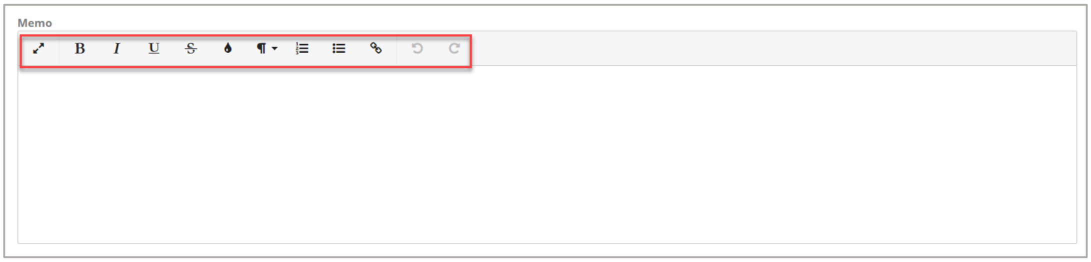
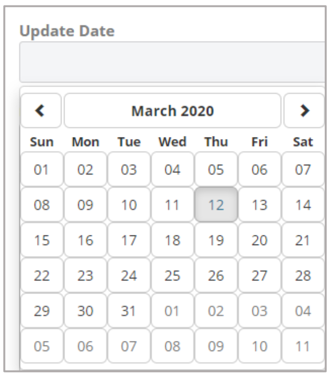
(703) 961-1007

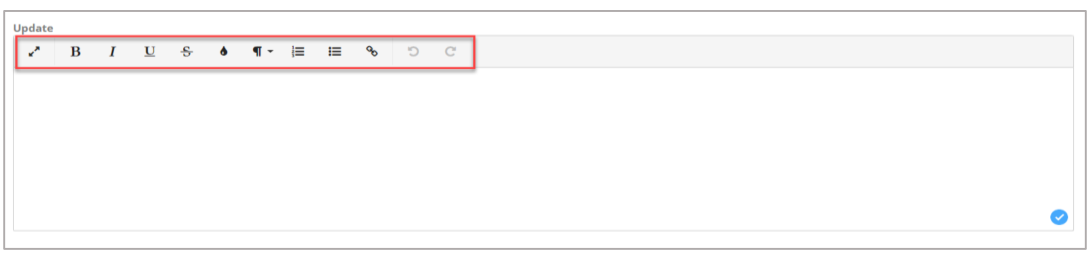
8. Enter any additional information in the **Memo** field. This is the explanation of the memo and what it means.



9. If an update to the memo is being entered, select an **Update Date** using the calendar menu.



10. If an update to the memo is being entered, enter the applicable **Update** information.



11. To complete and save the **Memos to File** document, click the dropdown arrow beside **Save & Share** and click the **Save** button or select **Save & Share** and share the document with the appropriate share groups.

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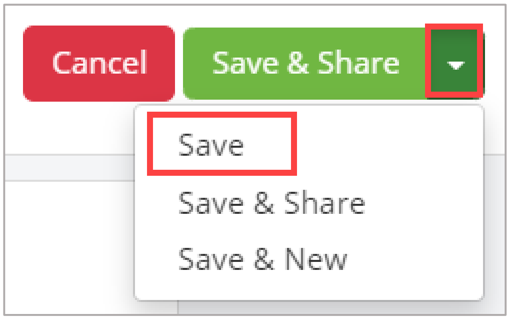
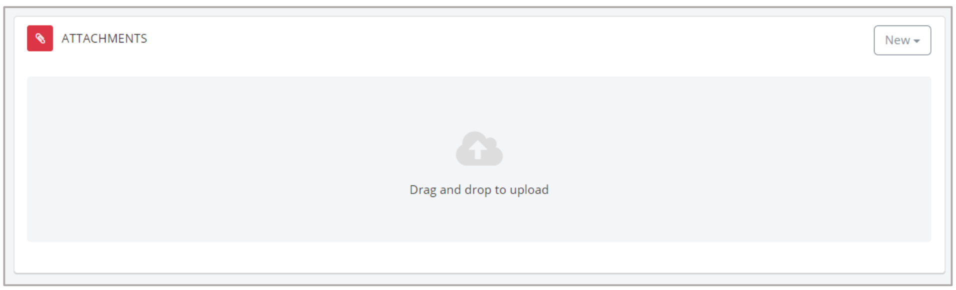


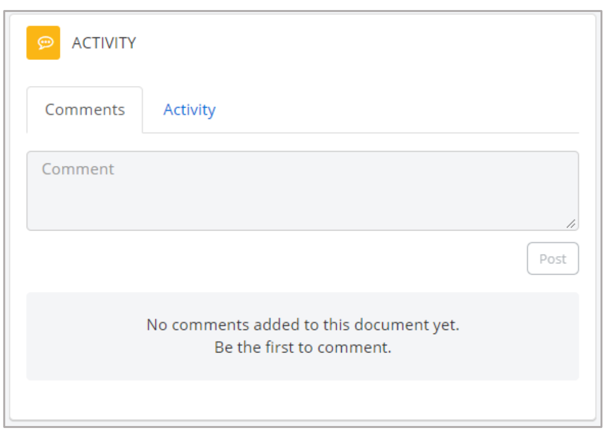
Attach Supporting Documentation

1. Drag and drop any supporting files to the **Attachments** section of the record.



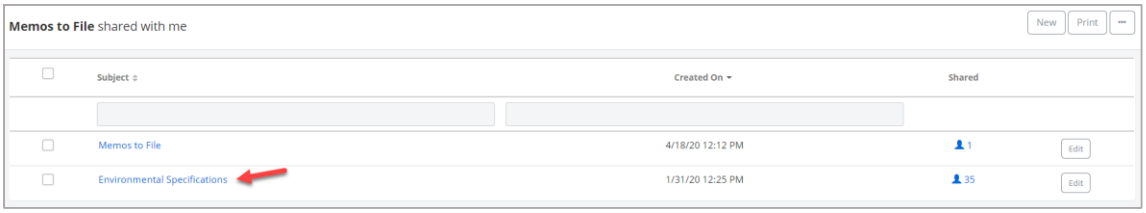
Comments

1. To ask questions or add commentary regarding the Field Report record, use the **Comments** section.



Editing the Memos to File Document

1. Open the Memos to File log and **click the title of the record** you would like to edit.



2. Click the **Edit** button located in the Details panel.

3. Make the required edits to the applicable fields, click the dropdown arrow beside **Save & Share** and click the **Save** button or select **Save & Share** and share the document with the appropriate share groups.