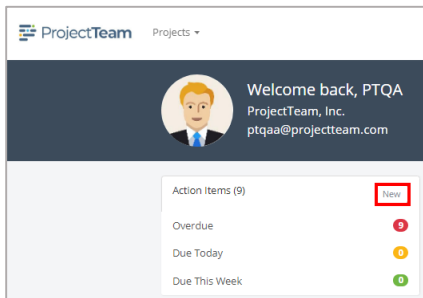


My Page – Action Items/Workflow/Recent Activity

When the user first logs in to ProjectTeam the landing page is called **My Page**. This page contains information pertaining to the logged in user including User Profile, Action Items, Workflow and Recent Activity. For Information regarding updating User Profile refer to QRG Entitled “My Page – Update Personal Profile” for instructions. The following information pertains to **Action Items**, **Workflow**, and **Recent Activity**.

Action Items – Creating New Item

1. To create a new Action Item click the **New** button. Action Items can also be created from any data form within the user’s project.

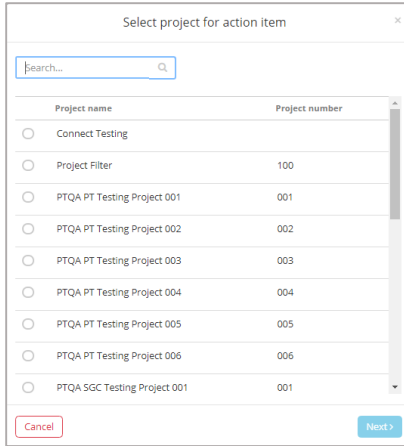


From User’s Home Page

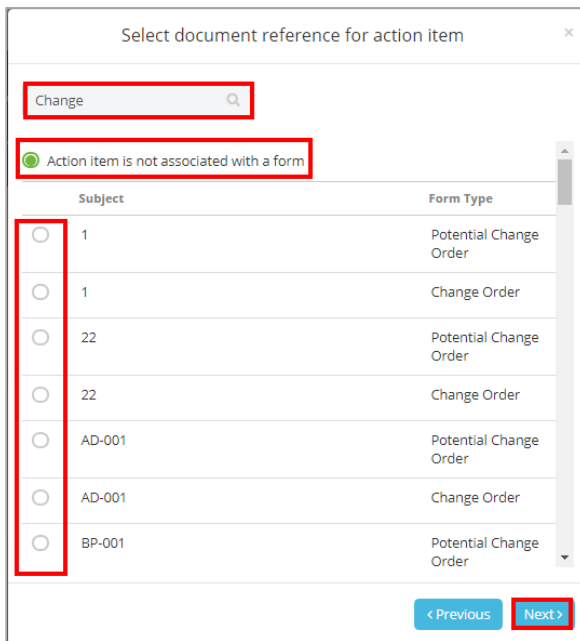


From within a data form

2. The **Select project for action item** modal window opens. A complete list of projects the user has access to will display. The user must select a project prior to proceeding. Use the **radio button** to the left of the project name to select a project and then click **Next**.



- The **Select document reference for action item** modal window opens. The selection will default to **Action item is not associated with a form**. If the item is associated with a form use the Search box to easily select the appropriate form. Use the **radio button** to the left of the form subject to select a specific form then click **Next**.



- The **New action item** modal window opens. Complete the required fields indicated by *Required and click **Save & Share** to save and share the Action Item with the Assigned to recipient.

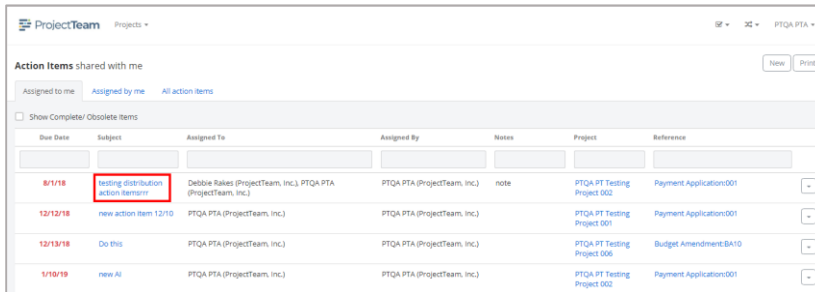
Action Items – Completing Existing Items

1. The **Action Items** pane on **My Page** will reflect all Action Items assigned to the user. All items will be displayed including a record count in the appropriate row according to the due dates under **Overdue**, **Due Today** or **Due This Week**. To view the Action Items click any row on the pane.

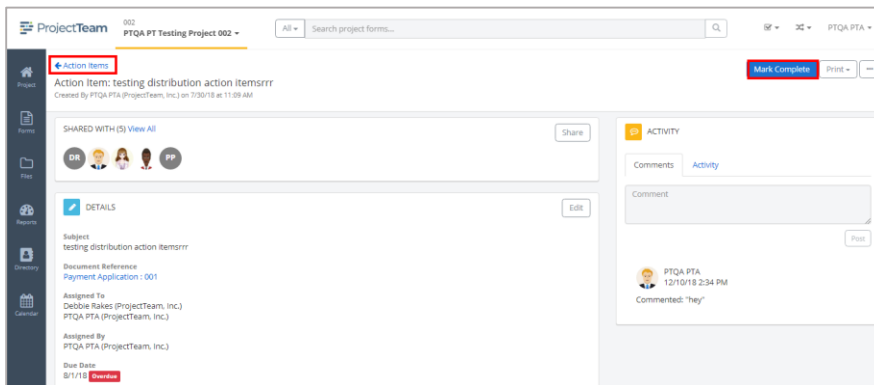
2. The **Action Items shared with me** page will open.

Due Date	Subject	Assigned To	Assigned By	Notes	Project	Reference
8/1/18	testing distribution action itemrrr	Debbie Rakes (ProjectTeam, Inc.) PTQA PTA (ProjectTeam, Inc.)	PTQA PTA (ProjectTeam, Inc.)	note	PTQA PT Testing Project 002	Payment Application:001
12/12/18	new action item 12/10	PTQA PTA (ProjectTeam, Inc.)	PTQA PTA (ProjectTeam, Inc.)		PTQA PT Testing Project 001	Payment Application:001
12/13/18	Do this	PTQA PTA (ProjectTeam, Inc.)	PTQA PTA (ProjectTeam, Inc.)		PTQA PT Testing Project 006	Budget Amendment:BA10
1/10/19	new AI	PTQA PTA (ProjectTeam, Inc.)	PTQA PTA (ProjectTeam, Inc.)		PTQA PT Testing Project 002	Payment Application:001

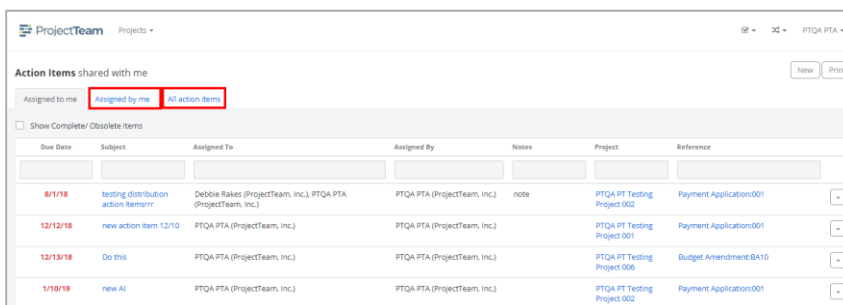
- The first tab will reflect items **Assigned to me**. To complete an item click on the **Subject** link contained in the view.



- The action item record will open. Review the item and click the **Mark Complete** button at the top of the page once the item has been completed. Click the **Action Items** breadcrumb trail in the top left corner to return to the action items view to complete additional items.

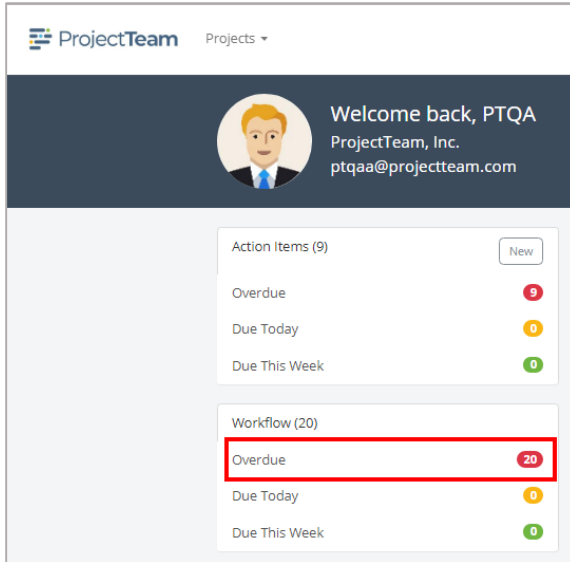


- Using the **Action Items shared with me** page, the user can also view action items **Assigned by me** and **All action items** by clicking one of the tabs.

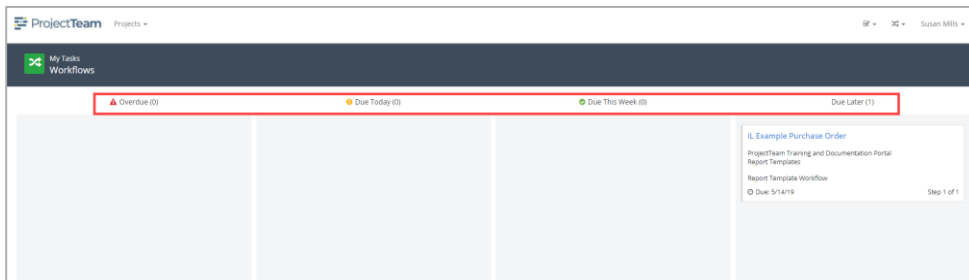


Workflow:

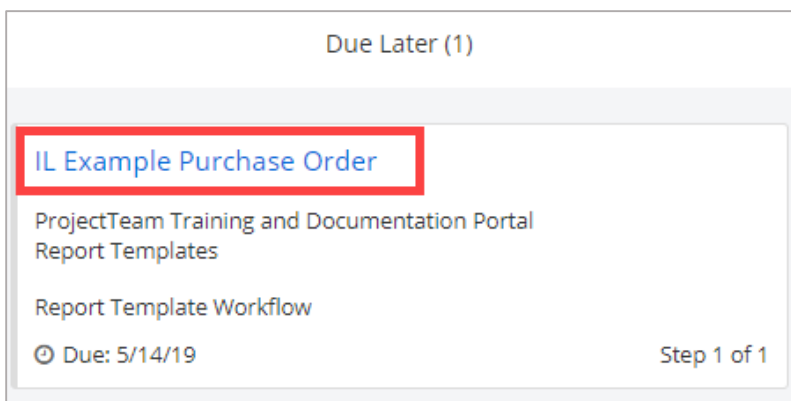
- The **Workflow** pane on **My Page** will reflect all **Workflow** records assigned to the user. All items will be displayed including a record count in the appropriate row according to the due dates under **Overdue**, **Due Today** or **Due This Week**. To view the **Workflow** click any row on the pane.



2. The **My Tasks Workflows** pane will open.
3. All **Workflow** items in your court will appear in swim lanes according to due dates with a count of how many workflow items are assigned and due to the User.



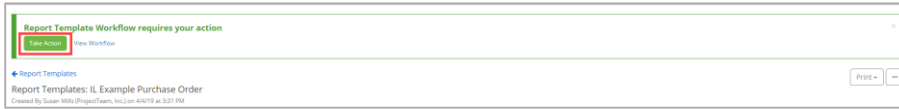
4. Click on the record **Subject** link to open the record.



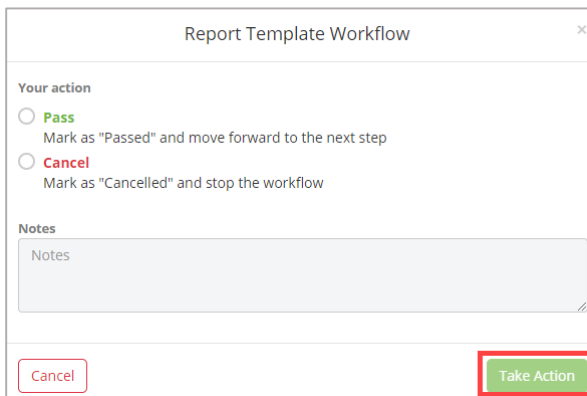
5. The appropriate form will open. On the top of the form the **Workflow for Record Name requires your action** message will display.



6. Click the **Take Action** button to perform action.



7. The **Workflow for Reporting** modal window will open. Click the radio button in front of **Pass** or **Cancel** and add any pertinent notes. Click the **Take Action** button.

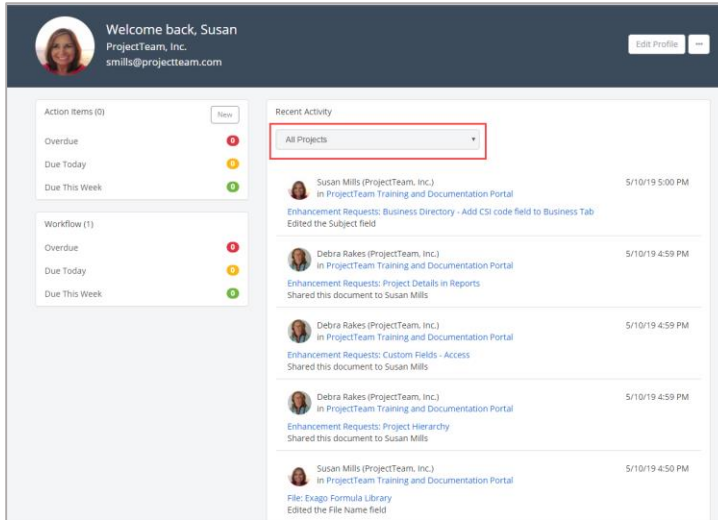


8. If **Passed**, the workflow will move to the next step and forward a notification to the next responsible party. If **Rejected**, the workflow will be forwarded in a notification to the previous responsible party. If **Cancelled**, the workflow will stop and no notification will be forwarded to any party.

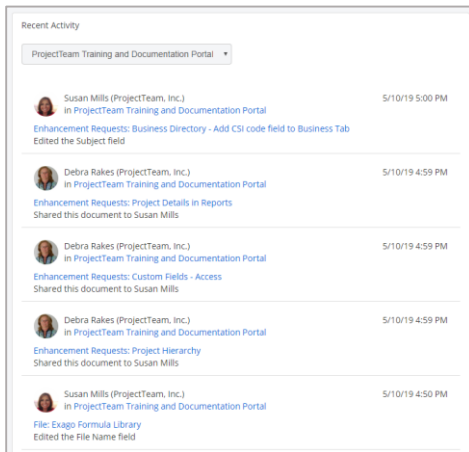
Recent Activity

The **Recent Activity** pane displays an ongoing list of activity performed and shared on all projects the User has access to. The Recent Activity will display **the User Name (Company Name), Project Name Number, Form Type Subject, the Activity Performed** and **Date Time** activity was performed.

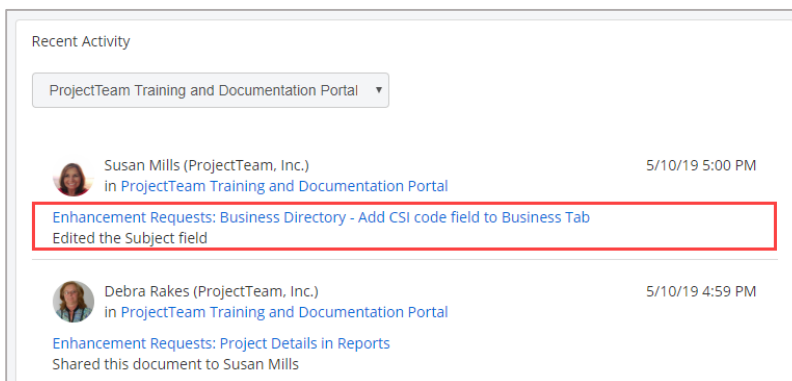
1. To review a list for a specific project click the **All Projects** dropdown menu and select a specific project.



2. The list will be updated with only records for the selected project.



3. To review a record, click the **Record Type: Subject** link.





4. The record will be displayed.

5. To open a specific project, click the **Project Name Project Number** link.

Recent Activity

ProjectTeam Training and Documentation Portal ▾

 Susan Mills (ProjectTeam, Inc.) 5/10/19 5:00 PM
in ProjectTeam Training and Documentation Portal
Enhancement Requests: Business Directory - Add CSI code field to Business Tab
Edited the Subject field

 Debra Rakes (ProjectTeam, Inc.) 5/10/19 4:59 PM
in ProjectTeam Training and Documentation Portal
Enhancement Requests: Project Details in Reports
Shared this document to Susan Mills

6. The project will be opened.