



Creating an Action

Quick Reference Guide

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An action is work to be done that is too small to be captured in a project task. Actions can be created on a project by using the Action related list at the bottom of the form. Action detail is available on the project status report.

1. Once you have opened the project, scroll to the bottom of the form to view the related lists. Select the Actions related list and click the **New** button.
2. Complete the form fields and **Save** the form.
3. The Action can be updated by either clicking on the Number field and opening the form or by double clicking on certain fields for inline editing.

This screenshot shows the 'Actions' related list for a project. The 'Actions (1)' tab is selected and highlighted with a blue box. Below the tabs, there is a 'New' button and a search bar. The list contains one action item with the following details:

Number	Short description	Priority	Assigned to	State
ACT0001002	Request additional resources for project	3 - Moderate	(empty)	Open

This screenshot shows the detail form for an action. The fields are as follows:

- Number: ACT0001001
- State: Open
- Priority: 2 - High
- Assigned to: Abel Tuter (Architect)
- Impact: 2 - Medium
- Due date: 2019-11-22
- Short description: Call Vendor and Check on Change Order
- Description: Check on the cost associated with the most recent change order.
- Work notes: (Empty text area)

At the bottom left, there are 'Save' and 'Submit' buttons. The 'Save' button is highlighted with a blue box.

This screenshot shows the Action list again. The first action item is highlighted with a blue box, and the 'Request additional resource' text is highlighted with a blue box, indicating it is an inline edit button.

Number	Short description	Priority	Assigned to	State
ACT0001002	Request additional resource	3 - Moderate	(empty)	Open