

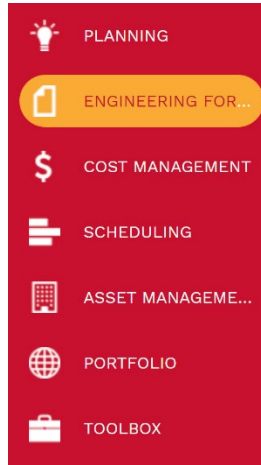
PMWeb Quick Reference

Red Zone Process

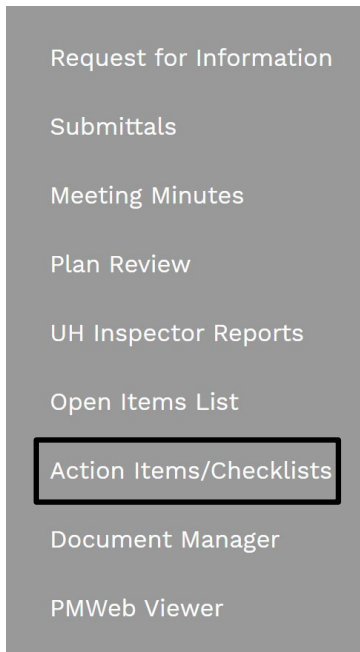
Overview: The Red Zone Process helps set projects up for a successful turnover. PM Web stores and provides an easy access source for a project's current and historical Red Zone documents. Updates to the Red Zone Checklist are managed in the details tab at the bottom of the page.


Reference: UHS FPC Red Zone Policy

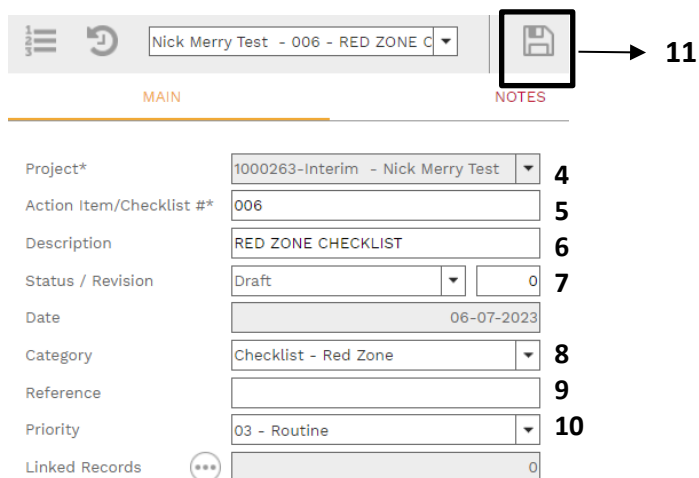
1- Click on **Engineering Forms** from the button on the left menu.



2- Under the Engineering forms tab, click on the **Action Items/Checklist** record.



- 3- Click on + **Add**.
- 4- **Project** field - Select the project from the dropdown menu.
- 5- **Action Item/Checklist #** field – auto populates with next sequential number
- 6- **Description** field - Enter 'RED ZONE CHECKLIST'
- 7- **Status** field - Leave in draft.
- 8- **Category** field - Select '**Checklist – Red Zone**' from the dropdown menu.
- 9- **Reference** field – Optional field.
- 10- **Priority** field – Leave as 'Routine'.
- 11- From the top bar, click on the icon  to save the header.



The screenshot shows a software interface with a top bar and a main form area. The top bar contains a navigation menu icon, a refresh icon, and a dropdown menu with the text "Nick Merry Test - 006 - RED ZONE C". To the right of the dropdown is a save icon (a floppy disk) which is highlighted with a black box and an arrow pointing to the number "11". Below the top bar are two tabs: "MAIN" (highlighted in orange) and "NOTES". The form area contains the following fields:

Project*	1000263-Interim - Nick Merry Test	4
Action Item/Checklist #*	006	5
Description	RED ZONE CHECKLIST	6
Status / Revision	Draft	7
Date	06-07-2023	
Category	Checklist - Red Zone	8
Reference		9
Priority	03 - Routine	10
Linked Records	0	

12- The details section will be used to post updated Red Zone checklists.

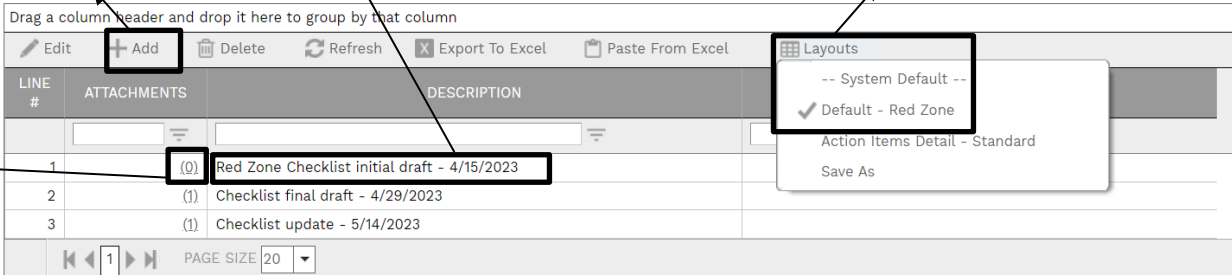
13- Under **Layouts**, select the 'Default – Red Zone' layout.

14- Select **+Add** to add a row.

15- Enter an appropriate description and a date i.e. 'Red Zone Checklist initial draft - 4/15/2023'.

16- Click on the  Save button.

17- Under the ATTACHMENTS column, click on the **(0)**.



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LINE #	ATTACHMENTS	DESCRIPTION
1	(0)	Red Zone Checklist initial draft - 4/15/2023
2	(1)	Checklist final draft - 4/29/2023
3	(1)	Checklist update - 5/14/2023

VIEW ATTACHMENTS

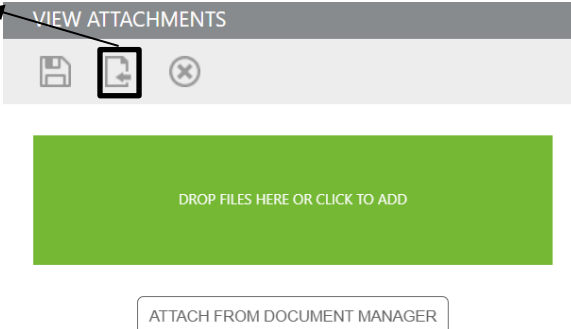
Save & Exit

DROP FILES HERE

ATTACH FROM DOCUMENT MANAGER

18- In the VIEW ATTACHMENTS pop up menu, drag the Checklist to the green **DROP FILES HERE** box.

19- Click on the  Save & Exit button.



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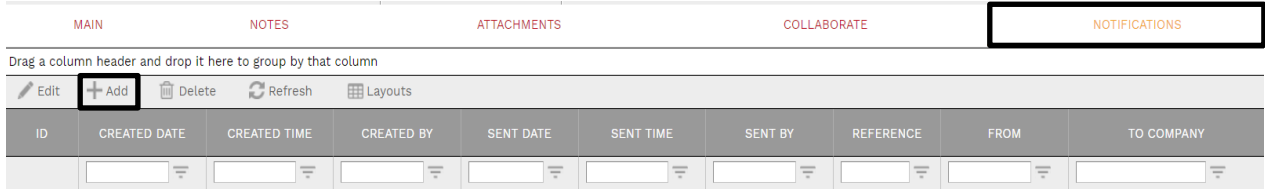
VIEW ATTACHMENTS

Save & Exit

DROP FILES HERE OR CLICK TO ADD

ATTACH FROM DOCUMENT MANAGER

20- To distribute the Red Zone Checklist, under **“NOTIFICATIONS”** tab, click **+Add**.



21- In the pop up box, click on the **☰** icons to select **To** and **CC** addressees.

22- Manual CC field – utilize to add e-mail addresses for non-PM Web users.

23- Subject field – Add a relevant subject line for the e-mail.

24- Status field – Leave blank.

25- Notification type field – Select from drop down menu if applicable.

26- Reference field – Optional field.

27- Due Date – Optional field. Enter desired date and time.

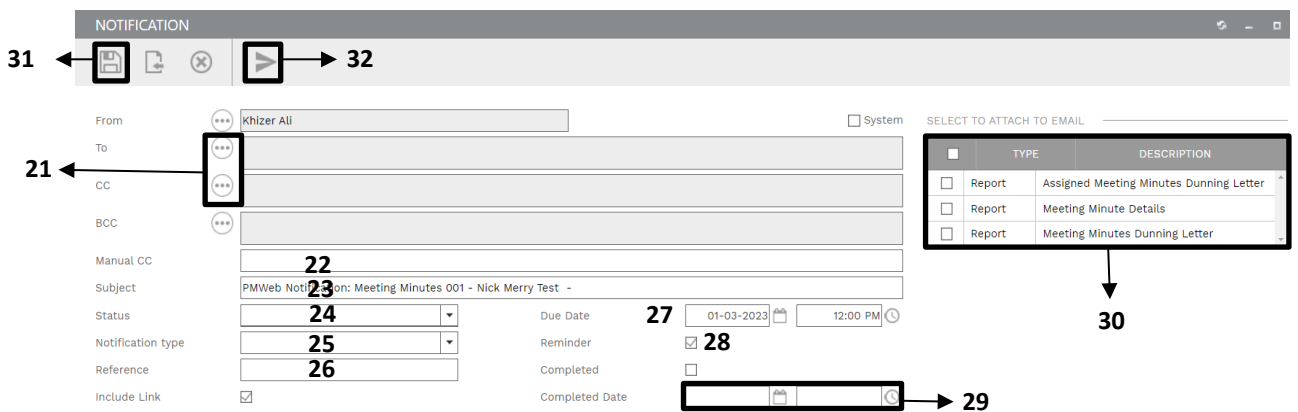
28- Reminder Completed – Optional field. Click.

29- Completed Date – Optional field. Select desired date and time.

30- Within the **“SELECT TO ATTACH TO EMAIL”** box, click on the desired file(s) to include in the email notification.

31- Click on the **“Save”** icon.

32- Click on the **“Send”** icon.



33- Process Complete