QUICK REFERENCE GUIDE (QRG):

RESPOND TO ACTION ITEMS IN THE OLT

Purpose of this QRG

- To teach you how to respond to active Action Items, that Supervisors have created/approved earlier, in the OLT

Intended Audience for this QRG

- Operators in the OLT

Purpose of Action Items in the OLT

- To provide instruction about what tasks/shift actions Operators need to perform on their shift

Prerequisites

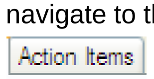
- You must have access to the OLT software application
- You must have an Operator role in the OLT to complete the procedure described below
- A Supervisor must have first created an Action Item Definition describing the details (ie what needs to be done, when and how often) about the Action Item
- One or more Action Items in the OLT must be 'active' and must have been marked by Supervisor as 'Response Required"

Helpful Hints

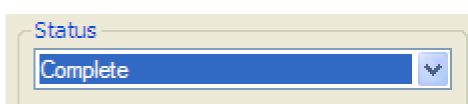
- Action Items can have the following statuses: **Approved** ; Pending ; **Rejected** ; Active ; InActive
- You can view Active Action Items from either the Priorities screen or from the Action Items screen
- If an Action Item has been marked by a Supervisor as 'Response Required' but an Operator does not respond *before the end of the current shift*, the text describing the Action Item will appear in **red** and the Action Item will re-appear at the top of the Priorities screen (and the Action Item screen) for the next shift.

Procedure

1. On the navigation pane, click Action Items icon 

to navigate to the Action Items screen.
2. Click the Action Items tab (located on the top of your screen) 

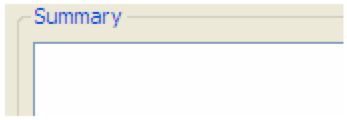
to navigate to the Action Items screen.
3. Click in the Action Items display grid to select/highlight the active Action Item you wish to respond to.
4. Click Respond button (located on the middle of your screen) 

to respond to the selected/highlighted Action Item.
5. Click the drop-down arrow in the Status box 

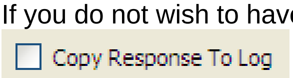
to select a status for the Action Item.
6. Click to choose desired status. For example, click 'Current' to select it from the list.

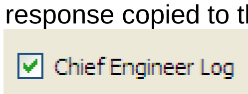
Note: Status can be set to Current; Complete; Incomplete or Can't Complete. Choose 'Current' if you are still working on the task. Choose 'Complete' if you were able to complete the task. Choose 'Incomplete' if you began to complete the task but for some reason were unable to finish it. Choose ' Can't Complete' if you were unable to begin the task.

Note: If you set the Status to either 'Incomplete' or 'Can't Complete' be sure to include an explanation.

7. Click in the Summary box 

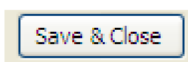
to select it.
8. Type a few words to briefly summarize your response.
9. If required, click in the Comments box 

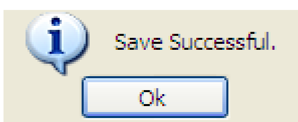
to select it.
10. Type additional information to provide detailed response.
11. If you do not wish to have your response copied to the Shift Log, then uncheck the Copy Response to Log box 

(located on the bottom of your screen.
12. If you wish to have your response copied to the Chief Engineer Log (in addition to the Shift Log), then check the Chief Engineer Log box 

(located on the bottom of your screen).

    Note: the Copy Response to Log box must remain 'checked,' if you wish to also copy your response to the Chief Engineer Log.

13. Click Save & Close button 

to save your work and close the Action Item Response screen.
14. Click Ok button 

to acknowledge your save was successful.