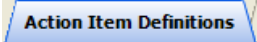## Helpful Hints

- **Action Items** are created by authorized personnel to schedule work that needs to be done for upcoming work permits.

- Any **Responses** to Action Items automatically create a **Shift Log**.

- When **editing** an active Action Item Definition, OLT will give the user the option to update those Action Items that have not yet been responded to.
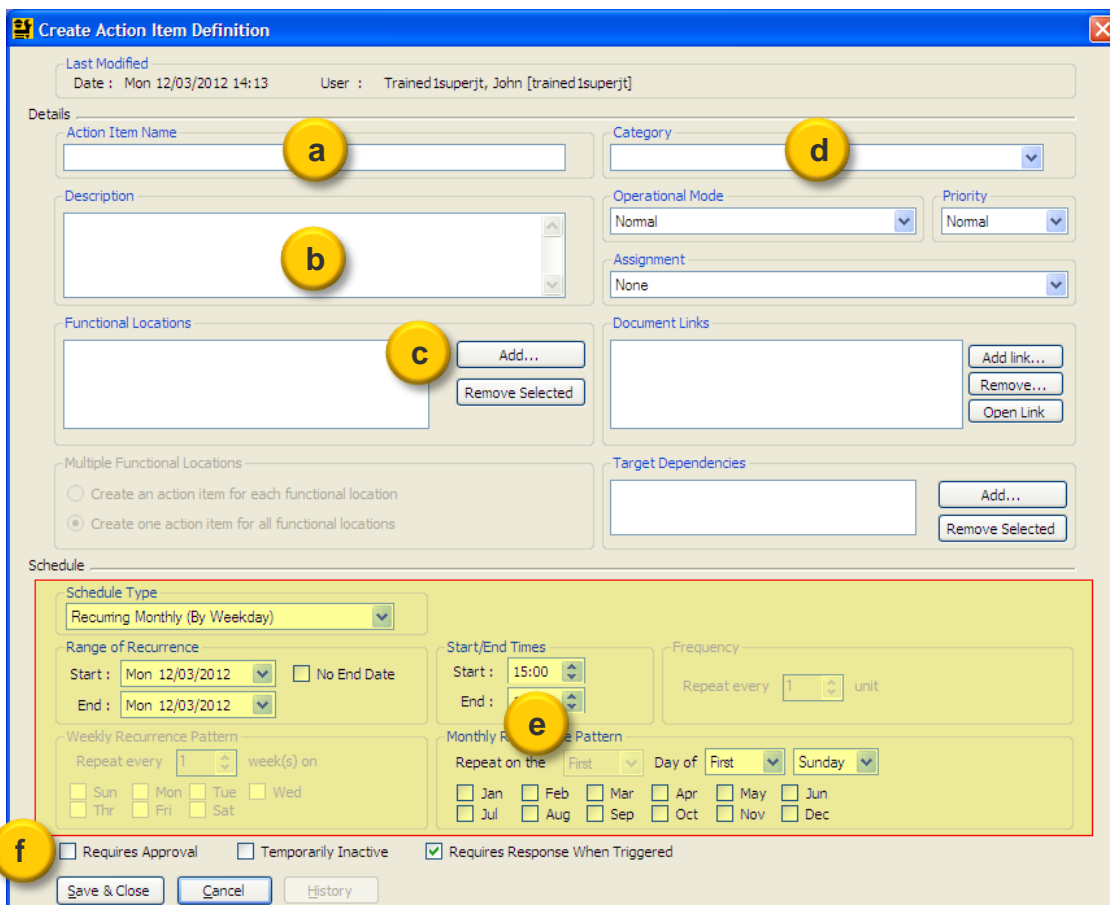
## Procedure

1. On the navigation pane, click on the **Action Item Definitions** icon to navigate to the **Action Item Definition** screen.

2. Click on the **Action Item Definitions** tab **Action Item Definitions** (located at the top of your screen).

> ⚠️ If you do not see the above tab in OLT then you are not currently authorized to create Action Item Definitions. Contact your OLT Site Administrator to request access.

3. Click on the **New** button New to open the **Create Action Item Definition** window. Complete the fields as required.



a) **Enter** a unique title in the **Action Item Name** box.

b) **Enter** the work required to be completed in the **Description** box.

c) For **Functional Locations**, click **Add** button to add one or more Functional Locations (FLOCs).

d) **Click** the drop-down arrow in the **Category** box to assign a category to help filter and find the Action Item.

> By default for most sites, OLT will create one action item that is associated to all the selected Functional Location(s). To have OLT create separate action item for each selected Functional Location click on **Create an action item for each functional location**.

e) **Click** the drop-down arrow in the **Schedule** box to set how often an Action Item should be generated by this definition. Options include:

- **Single** – OLT will only generate a single Action Item based on the **Jour** and **Heure** entered.
- **Continuous** – OLT will generate a single Action Item that spans across multiple shifts based on the **start** and **end date** entered.
- **Recurring Daily** – OLT will generate multiple Action Items based on the # of **repeated days** entered in **Frequency**.
- **Recurring Weekly** – OLT will generate multiple Action Item based on the **week frequency** entered in **Weekly Recurrence Pattern**.
- **Recurring Monthly (by date)** – OLT will generate multiple Action Item based on the **monthly frequency** entered in **Monthly Recurrence Pattern**.
- **Recurring Monthly (By Weekday)** – OLT will generate multiple Action Item based on the **monthly frequency** and **day of week** entered in **Monthly Recurrence Pattern**.

f) If desired, check off **Requires Approval** to place this Action Definition in pending state and require additional approval before OLT can generate it for the operators.

g) If desired, uncheck **Requires Response When Triggered** if you want OLT to automatically set the action item to complete at the end of the shift regardless if it was responded to or not. Otherwise a response will be required by operators.

4. Click on **Save** to save your work and close the **Create Action Item Definition** window.

> All **Errors** 🔴 must be corrected before the **Action Item Defintion** can be saved and view by others.