

Helpful Hints

- **Readings** are created by authorized personnel to schedule work that needs to be completed.
- **Readings** can be created to schedule work required for upcoming work permits such as gas testing, etc.
- Any **Responses** to Readings automatically create a **Shift Log**.
- When **editing** an active Reading Definition, OLT will give the user the option to update those Readings that have not yet been responded to.

Procedure



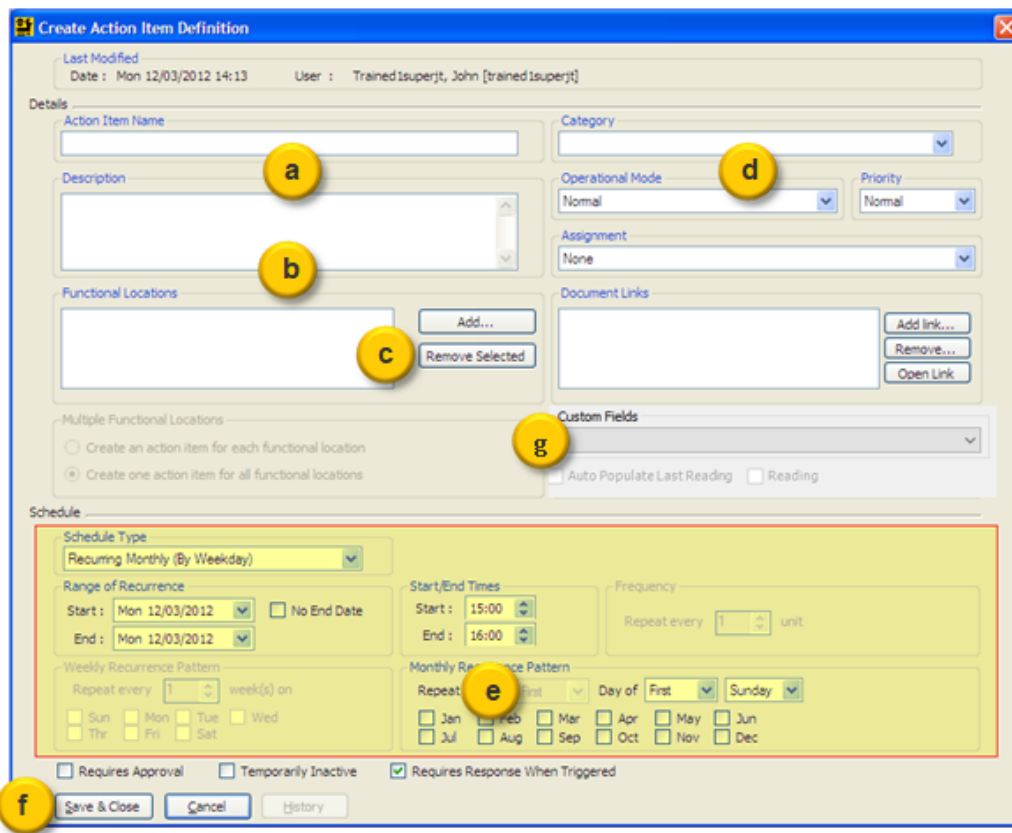
1. On the navigation pane, click on the **Reading Definitions** icon to navigate to the **Reading Definition** screen.

2. Click on the **Reading Definitions** tab (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 Reading Definitions. Contact your OLT Site Administrator to request access.

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



The screenshot shows the 'Create Action Item Definition' window. It has a blue title bar and a yellow background. The window is divided into several sections:

- Details:** Contains fields for 'Action Item Name', 'Description', 'Functional Locations', 'Category', 'Operational Mode', 'Priority', 'Assignment', and 'Document Links'. Callouts a, b, c, d, and e point to these fields.
- Multiple Functional Locations:** Contains two radio buttons: 'Create an action item for each functional location' and 'Create one action item for all functional locations'.
- Schedule:** Contains a 'Schedule Type' dropdown, 'Range of Recurrence' (Start/End dates), 'Weekly Recurrence Pattern' (Repeat every 1 week(s) on), and 'Monthly Recurrence Pattern' (Repeat every 1st day of First Sunday). Callout f points to the 'Save & Close' button.
- Custom Fields:** Contains a 'Custom Fields' dropdown and 'Auto Populate Last Reading' and 'Reading' checkboxes.
- Buttons:** 'Add...', 'Remove Selected', 'Add link...', 'Remove...', 'Open Link', 'Save & Close', 'Cancel', and 'History'.

- 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 Reading.




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

- e) **Click** the drop-down arrow in the **Schedule** box to set how often a Reading should be generated by this definition. Options include:
 - **Single** – OLT will only generate a single Reading based on the **Jour** and **Heure** entered.
 - **Continuous** – OLT will generate a single Reading that spans across multiple shifts based on the **start** and **end date** entered.
 - **Recurring Daily** – OLT will generate multiple Readings based on the # of **repeated days** entered in **Frequency**.
 - **Recurring Weekly** – OLT will generate multiple Reading based on the **week frequency** entered in **Weekly Recurrence Pattern**.
 - **Recurring Monthly (by date)** – OLT will generate multiple Reading based on the **monthly frequency** entered in **Monthly Recurrence Pattern**.
 - **Recurring Monthly (By Weekday)** – OLT will generate multiple Reading 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) For Reading, Select the Custom Fields for which reading needs to be taken. Select the Reading check box to have it displayed under the reading section.

3. Click on **Save** to save your work and close the **Create Reading Definition** window.



All **Errors**  must be corrected before the **Reading Definition** can be saved and view by others.