Universal Action List Definition

The **Universal Action List** Screen is a simple to use screen for managing lists of action items that require a response. These action items are simple tasks that do not require the weight of a defined issue.

Action items are often assigned at meetings where issues are being discussed. Issue resolution is often accomplished by maintaining an organized sequence of action items and this screen performs that function.

The Workflow View enables programmatic definition and control of the routing of action items to a specific user's AiM WorkDesk, relative to a specific CPPM table (*e.g., Capital Project Screen*).

Responsibility: PROJECT MANAGER

The Project Manager will perform the following procedures for creating a Universal Action List in AiM.

Create a Universal Action List:

- 1. From the WorkDesk, click: Capital Projects
- 2. Click: NEW (next to Universal Action List)

AiM Universal Action List About												
Save												
View	001	Status	INITIATION Q									
Extra Description	BID PACKAGE IV 95% REVIEW	Туре	DESIGN REVIEW Q									
Notes Log	NEW BUSINESS BUILDING	Responsibility	DESIGN REVIEW									
User Defined Fields		nesponsioney	PROJECT MANAGER									
Related Documents	Capital Project CP15-0103 Review Date Nov 02, 2015	Contract Type	v									
		Contractor	-OPTIONAL-									
	BUSINESS BUILDING (SPEARS SCHOOL OF Due Date Nov 20, 2015	Contract	Q									

- 3. The **UAL number** <u>after a Project/Type</u> has been chosen.
- 4. Enter a description for the UAL
- 5. Select **Type**, Click: ^Q Zoom. *Reference the CPPM SOP for specific Business Processes for each type*.
- 6. Select Capital Project, Click: Q Zoom
- 7. Select **Responsibility**, Click: ^Q Zoom
- 8. Enter a **Review Date** and **Due Date**
- 9. -OPTIONAL- Attach a specific Contract, if applicable
- 10. From Action Item, click: Add. Enter all necessary fields

Action Items						Remove Add			
	Line	Login	Date	Reference	ltem	Description	Response	-	Complete
	1	ROSNER	Nov 09, 2015					.::	

- 11. Click: ^Q Zoom, populate the **Region, Facility, Property and Location**
- 12. Select Date of NEXT Meeting and populate the Region, Facility, Property and Location
- 13. From Meeting Minutes screen, click: Save

CP-09

