

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.

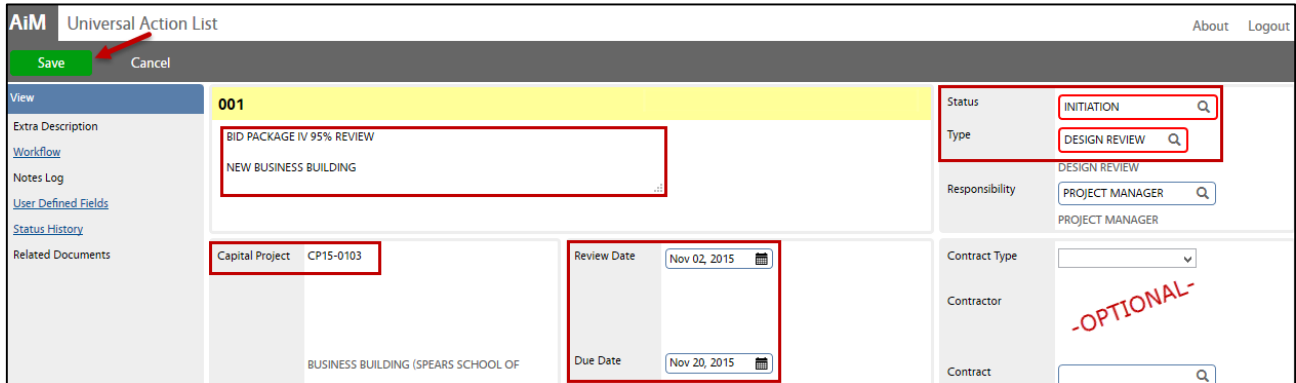
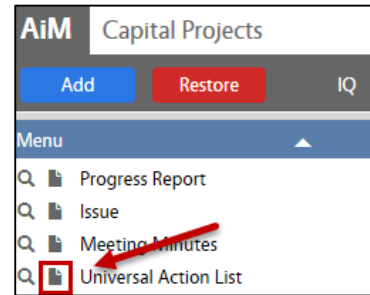
The Workflow View enables programmatic definition and control of the routing of action items to a specific user's AiM WorkDesk, relative to a specific CPPM table (e.g., *Capital Project Screen*).

Responsibility: PROJECT MANAGER

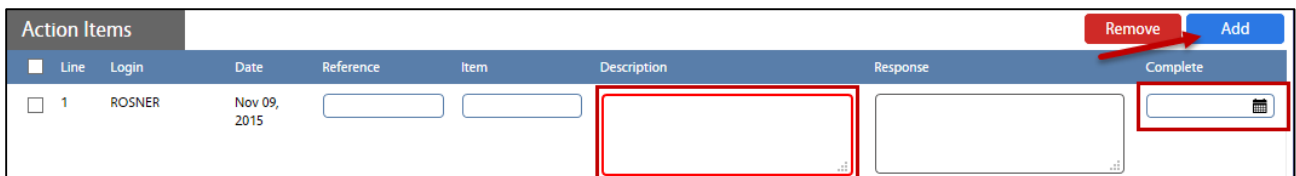
The Project Manager will perform the following procedures for creating a Universal Action List in AiM.

Create a Universal Action List:

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



3. The **UAL number** after a Project/Type has been chosen.
4. Enter a **description** for the UAL
5. Select **Type**, Click: Zoom. *Reference the CPPM SOP for specific Business Processes for each type.*
6. Select **Capital Project**, Click: Zoom
7. Select **Responsibility**, Click: 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



11. Click: 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**