

Action Tracking Settings user guide

Type: User Documentation 23-Oct-2020 | Trygve Ålbotsjord

Action Tracking Setup

This document outlines the information required to use Pims Action Tracking setup.

General

Settings below can be managed by the project.

- Set any default values
- Append project specific content to email templates.
- Configure if Key Milestones / OMS Sub-Element are required, and decide if for non-S&OR Actions Owner can be the same as Approver.
- Manage members of module specific roles.
- Manage status distribution subscriptions.

Settings below can be managed globally (for all projects).

- Define "Action Closed by Reason".
- Set template for default values (these will be used for any new project created).
- Edit content of email templates.
- Define Event Categories
- Define Event Types
- Set template for if Key Milestones / OMS Sub-Element are required, and template for non-S&OR Actions Owner can be the same as Approver (these will be used for any new project created).
- Configure settings for the module dashboards
- Define Priorities

Working in the setup screens

The screenshot shows a table interface for 'Impact Areas'. At the top, the header 'Impact Areas (showing 1-15 of total 17 rows)' is labeled with a red '1'. To its right is a search bar labeled with a red '2'. The table has columns: 'Impact Area' (with a dropdown arrow, labeled with a red '3'), 'Sort Order', 'Default', 'Inactive', and an action column. The first data row is 'NPV (Post Tax)' with 'Sort Order' 1, and checkboxes for 'Default' and 'Inactive'. A star icon is in the first column of the second row, labeled with a red '7'. The bottom of the screen shows pagination controls: 'showing 1-15 of total 17 rows', 'Page size: 15', and a filter 'Inactive=0'. Various icons for navigation and actions are also present.

Impact Areas (showing 1-15 of total 17 rows)					
...	Impact Area	Sort Order	Default	Inactive	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
▶6	NPV (Post Tax)	1	<input type="checkbox"/>	<input type="checkbox"/>	5
★			<input type="checkbox"/>	<input type="checkbox"/>	

Navigation: [Previous] [Next] [Refresh] [Export] [Filter] Inactive=0

Page: showing 1-15 of total 17 rows Page size: 15

1. Header name and amount of records displayed out of total amount of records.

2. Free text search.

3. Column chooser and layout options.
4. Column filters. Free text search for that column or pick options to filter on from the filter icon.
5. Delete the selected row.
6. Selected column indicator.
7. New row. Column indicator shown as star, and enter text directly into the grid. Navigate out of the row to commit the new record.
8. Navigate between pages. Go 1 page forwards or backwards, or go to last page or first page.
9. Edit the amount of records displayed, and view amount of records displayed out of total amount of records.
10. Reload the grid.
11. Export to Excel.
12. Filter builder. Allows for building simple or complex filters, store them, and load them. Most grids will have a default filter applied i.e only show active records. You can remove this filter by clicking the button and selecting the "Remove active filter" option.
13. Current active filter.

Note: Moving columns around, hiding columns, or changing page size will be cached to the browser and remembered the next time you open the same page. Please note that this does not apply if you open the same page in another browser or on another computer. Some of the options listed above may be restricted based on the functionality or the users personal permissions, thus some options may not appear in every grid like delete ability etc.

Project Setup

AT Settings (Balder Development Project)

Default Values

Email Templates

General

Roles

Status Distribution

Settings that applies to the current project. Project name is displayed in brackets at the top of the menu. Global/Project Admins/Module Super Users that has access to multiple project must use the

change domain functionality to change their current domain to be able to edit settings for another project.

Note : Most of the settings that can be edited in the setup will apply directly for forms updated after the settings was edited, i.e if you set a value to be inactive it will immediately no longer appear in the list of values inside any form but it will still remain selected on existing forms where previously used.

Global Setup

Global AT Settings

Action Closed by Reasons

Default Values (T)

Email Templates

Event Categories

Event Types

General (T)

General

Priorities

The Global Template Project is used as a template for project settings. Any changes to global template tabs marked with "(T)" will act as defaults to be imported for new projects on creation. If updated these changes will not affect any of the existing projects. Global Setup can only be managed by Global Administrators by changing their domain to "GlobalTemplate".

Tabs

Action Closed by Reasons (Global)

Configuration below will make Action Closed By Reason mandatory based on the Stage of the project and Event Type of the action source

Action Closed by Reasons (showing 1-2 of total 2 rows)

...	Reason	Sort Order	Inactive	
	<input type="text" value="Search"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
▶	Closed by Design		<input type="checkbox"/>	<input type="checkbox"/>
	Operational Procedure		<input type="checkbox"/>	
★			<input type="checkbox"/>	

Action Closed by Reasons Settings (showing 1-1 of total 1 rows)

...	Stage	Event Type	
▶	Execute	HAZOP	<input type="checkbox"/>
★			

showing 1-2 of total 2 rows
Page size: 15

showing 1-1 of total 1 rows
Page size: 15

Default Values (Project)

Updated on 30-Mar-2015 by janleon@omega.no

S&OR Implications
☒

Type of default value toggles:

- ☐ indicates that the checkbox on the form will have no default value set
- ☐ indicates that the checkbox on the form initially will show as No/False
- ☒ indicates that the checkbox on the form initially will show as Yes/True

In this tab you can configure a default selection of listed fields. When a new form is raised the value of the field will be set per what is configured here.


Email Templates (Global)

Event Categories (showing 1-7 of total 7 rows)			
		<input type="text" value="Search..."/>	
...	Event Category	Inactive	
	<input type="text" value=""/>	<input type="text" value=""/>	
▶	HSE	<input type="checkbox"/>	
	Orange Book	<input type="checkbox"/>	
	Other	<input type="checkbox"/>	
	PRM	<input type="checkbox"/>	
	RAP	<input type="checkbox"/>	
	VAP	<input type="checkbox"/>	
	Verification Review	<input type="checkbox"/>	
★		<input type="checkbox"/>	

Event Types (Global)

Event Types (showing 1-15 of total 49 rows)

q Search...

...	Event Type	Event Category	OMS Sub-Element Mandatory	Inactive	
	Q	Q	Q	Q	
▶	Audit	HSE	<input type="checkbox"/>	<input type="checkbox"/>	
	Audit Finding	HSE	<input type="checkbox"/>	<input type="checkbox"/>	
	Compliance (Regulatory, Legal, etc)	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	Concession Deviation Request	Other	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Co-Owner Request	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	Correspondence	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	Deviation	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	Early Operability Review	Verification Review	<input type="checkbox"/>	<input type="checkbox"/>	
	EDR/PHSSER	Orange Book	<input type="checkbox"/>	<input type="checkbox"/>	
	Engineering Discipline Review	Verification Review	<input type="checkbox"/>	<input type="checkbox"/>	
	Environmental and Social Impact Assessment	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	Environmental and Social Screening	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	Environmental Impact Identification Workshop	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	Exemption	HSE	<input type="checkbox"/>	<input type="checkbox"/>	
	Formal Safety or Risk Assessment	Other	<input type="checkbox"/>	<input type="checkbox"/>	
★			<input type="checkbox"/>	<input type="checkbox"/>	

⏪ ⏩ showing 1-15 of total 49 rows Page size: 15 ↺ ↻ ⏴ Inactive=0

General (Global)

Save
Cancel

Updated on 01-Oct-2016 by janleon@omega.no

Display Actions Deferred in last 7 days in Dashboard? ☐

Display Actions Deferred in last 30 days in Dashboard? ☐

Display Actions Deferred in last 90 days in Dashboard? ☒

Weekly Activity Tracker Min. Zoom:

Weekly Activity Tracker Max Zoom:

Monthly Activity Tracker Min. Zoom:

Monthly Activity Tracker Max Zoom:

Weekly Open and % Open Overdue Min. Zoom:

Monthly Open and % Open Overdue Min. Zoom:

Monthly % Closed on Time Min. Zoom:

Configure settings for the module dashboards

- Display settings - If ticked this field will be displayed for relevant widgets in the dashboard.
- Zoom settings - Certain widgets will have historical data and future data. Setting Max/Min zoom will determine how far back in time the widget will go, or how far into the future it will go.

General (Project)

Save
Cancel

Updated on 05-Mar-2018 by rashmi

Is identification of OMS Sub-Element required? ☒

Is key milestones required? ☐

For non-S&OR Actions the Owner cannot be the same as the Approver? ☐

Configure if Key Milestones / OMS Sub-Element are required, and decide if for non-S&OR Actions Owner can be the same as Approver

Priorities (Global)

Priorities (showing 1-3 of total 3 rows)

Search...

...	Priority	Sort Order	Default	Inactive	
	Q	Q	Q	Q	
▶	High	1	<input type="checkbox"/>	<input type="checkbox"/>	
	Medium	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Low	3	<input type="checkbox"/>	<input type="checkbox"/>	
★			<input type="checkbox"/>	<input type="checkbox"/>	

◀ < > ▶

showing 1-3 of total 3 rows

Page size: 15

Inactive=0

Roles (Project)

Roles (showing 1-1 of total 1 rows)

Search...

...	Role	
▶	Action Approver	

◀ < > ▶

showing 1-1 of total 1 rows

Page size: 15

Persons

Project Roles

Portfolio Roles

Global Roles

Persons (showing 1-9 of total 9 rows)

Search...

...	Person ID	Name	
	Q	Q	
▶	AalbTryg	Aalbotsjord, Trygve	
	ATSuTryg	Nordmann, Trygve	
	eriksand	eriksen, andreas	
	JakobseH	Jakobsen, Hans V	
	SandsleJ	Sandslett, Jan Leon	
	SondTerj	Sondresen, Terje	
	SteinKen	Steinsvik, Kenneth	
	StroKarl	Stroud, Karl	
	UrquNata	Urquiaga, Natalia	
★			

◀ < > ▶

showing 1-9 of total 9 rows

Page size: 15

Managing members of the specific roles to the module. This will limit the list for these roles in the form to the specific persons/roles configured here.

Status Distribution (Project)

Persons Project Roles Business Roles				
Persons (showing 1-1 of total 1 rows)			<input type="text" value="Search..."/>	
...	Status	Name	Immediate	
	<input type="text" value="Q"/>	<input type="text" value="Q"/>	<input type="text" value="Q"/>	
▶	Proposed	Aalbotsjord, Trygve	<input type="checkbox"/>	<input type="button" value="✕"/>
★			<input type="checkbox"/>	
<div> ⏪ ⏩ ⏴ ⏵ showing 1-1 of total 1 rows Page size: <input type="text" value="15"/> ↺ 📄 ⏴ </div>				

Configuring subscriptions for when the forms move to a specific status. Emails will by default follow the users configured email frequency, though if "Immediate" is ticked the emails will be sent as soon as the form changes to the applied status.