# 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

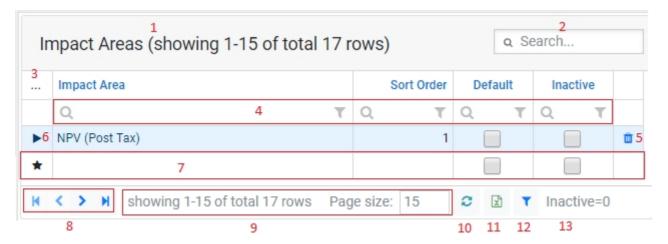
Settings below can be managed by the project.

- · 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

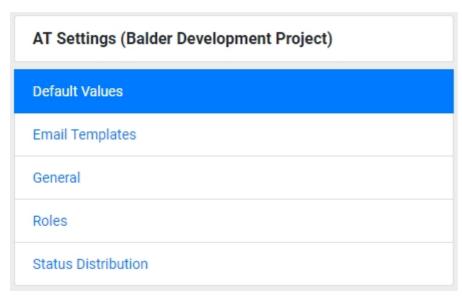


- 1. Header name and amount of records displayed out of total amount of records.
- 2. Free text search.

- 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**

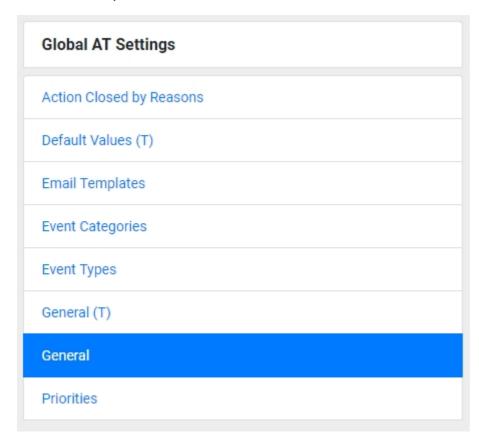


Settings that applies to the current project. Project name is displayed in brackets at the top of the menu. Global/Project Admins/Module Super Users that has access to multiple project must use the

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.

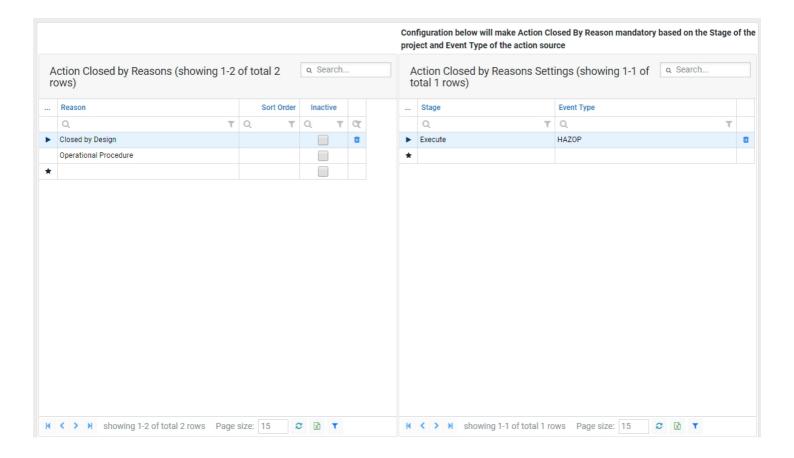
#### Global Setup



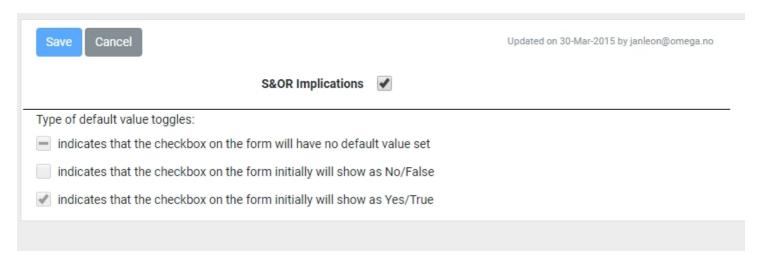
The Global Template Project is used as a template for project settings. Any changes to global template tabs marked with "(T)" will act as defaults to be imported for new projects on creation. If updated these changes will not affect any of the existing projects. Global Setup can only be managed by Global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

#### Tabs

Action Closed by Reasons (Global)

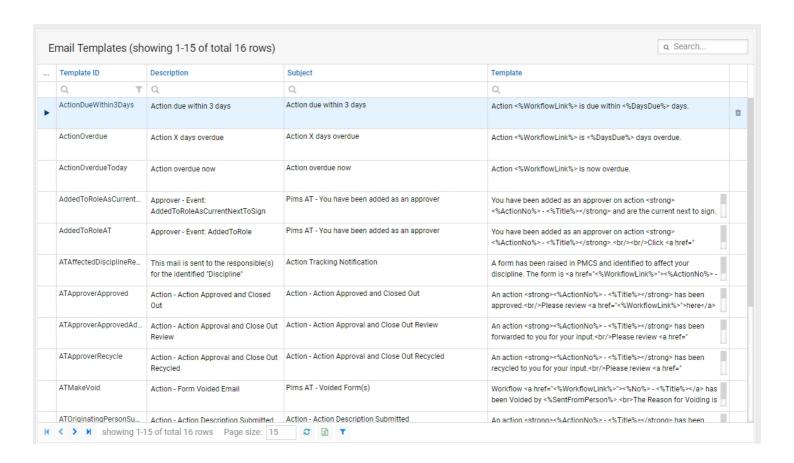


### Default Values (Project)



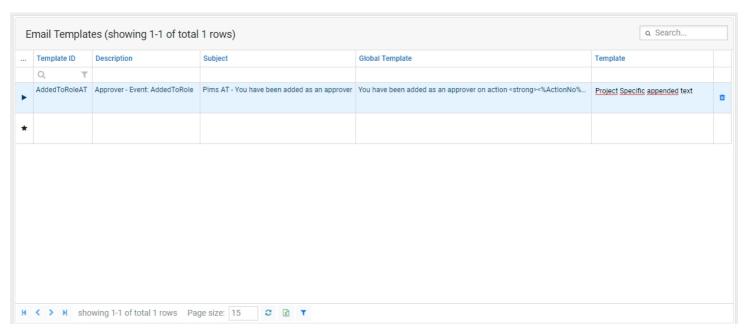
In this tab you can configure a default selection of listed fields. When a new form is raised the value of the field will be set per what is configured here.

### **Email Templates (Global)**



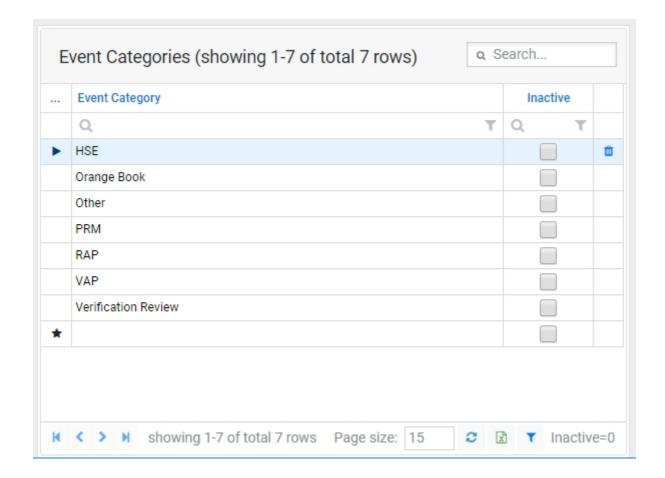
This is a full list of all email templates specific to the module. You are allowed to edit the content of the email templates used.

# **Email Templates (Project)**

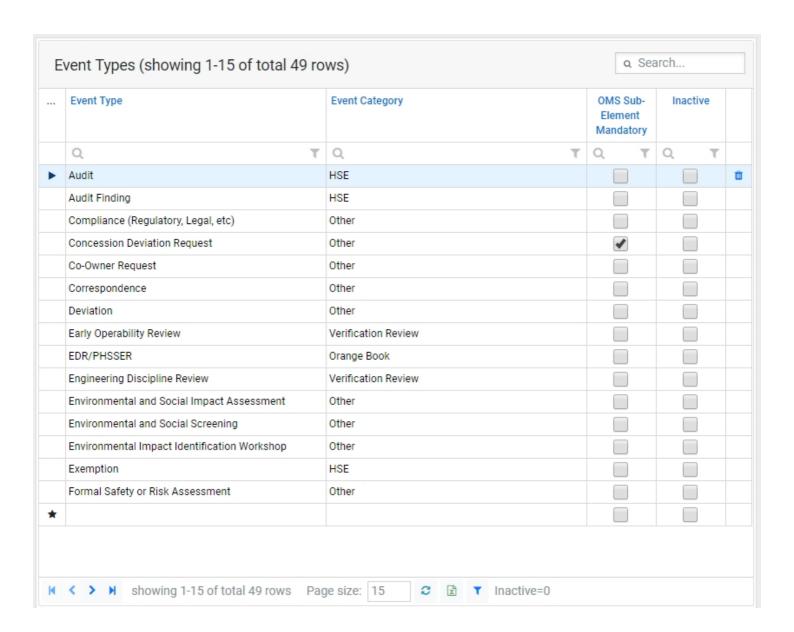


If required you can add a template from the global list and append additional project specific text to it. This text will be appended to the global template.

### **Event Categories (Global)**



Event Types (Global)



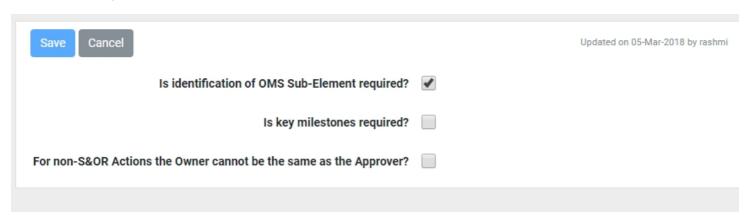
General (Global)

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:	4
Weekly Activity Tracker Max Zoom:	4
Monthly Activity Tracker Min. Zoom:	3
Monthly Activity Tracker Max Zoom:	3
Weekly Open and % Open Overdue Min. Zoom:	4
Monthly Open and % Open Overdue Min. Zoom:	3
Monthly % Closed on Time Min. Zoom:	3

#### Configure settings for the module dashboards

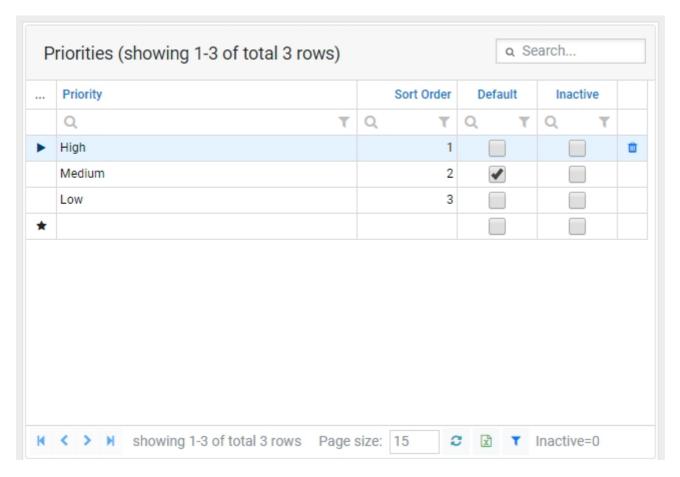
- Display settings If ticked this field will be displayed for relevant widgets in the dashboard.
- Zoom settings Certain widgets will have historical data and future data. Setting Max/Min zoom will determine how far back in time the widget will go, or how far into the future it will go.

### General (Project)

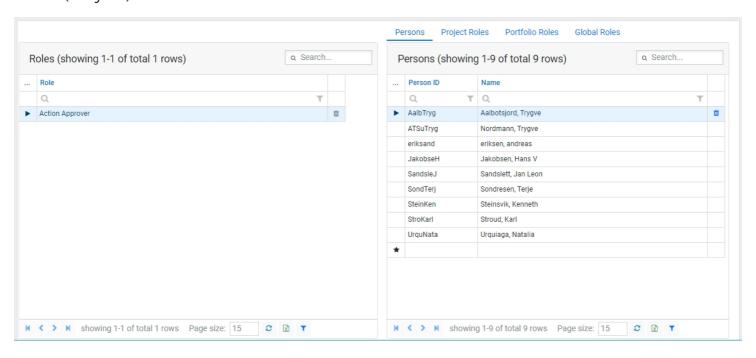


Configure if Key Milestones / OMS Sub-Element are required, and decide if for non-S&OR Actions Owner can be the same as Approver

#### Priorities (Global)

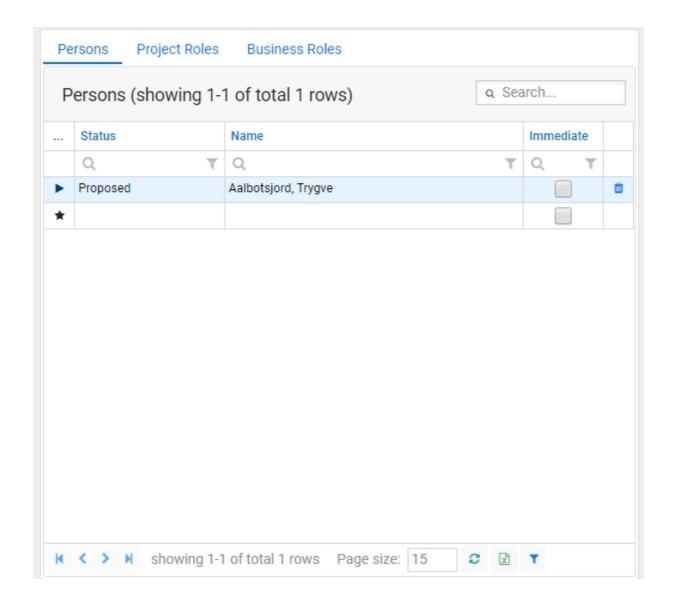


#### Roles (Project)



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)



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.