



## Action Register - Guidelines for Usage

Rev. 2009/02/20

## *Purpose*

The Action Register is used to track and manage all actions identified for an initiative, project or program. Key details include a description of the action required, date the action is required to be completed by, the primary person responsible for the action and the current status.

An Action Register benefits not only the Project Manager, but also all team members and particularly those assigned action items. Knowing exactly what action is needed and by what date allows for individuals to plan their actions. This is especially important for a volunteer project where actions are done in our limited “spare time”. As well, the action items belonging to one member are often linked to those of another member, making on-time accomplishment of an action all the more important.

## *Details*

The Action Register consists of a separate table for each Team Member, and logs the following details relating to tasks:

- Item
- Status
- Due Date
- Task
- Comment
- Assigned
- Completed

*Example:*

Item	Status	Due Date	Task
4	Assigned	Feb.24	Paint casting tubes with insulator paint then weigh & record masses.
5	Working	Feb.28	Develop finocyl coring rod.

Comment	Assignee	Completed
Paint interior only	Rick	
Parallel to Ed's work.	Rick	

The following is a description of each detail.

**Item** – A number assigned to a Team Member’s task. For convenience, the numbers are sequential and unique to each assignee.

**Status**- A description of the various status options is shown in the table below, together with the person to whom the status option applies.

<b>Status</b>	<b>Description</b>	<b>Responsible person</b>
<b>Assigned</b>	The task has been created, but not started	Manager
<b>Accepted</b>	Assignee has accepted responsibility to meet the deadline	Assignee
<b>Working</b>	Work has been started on the task	Assignee
<b>Blocked</b>	Work on the task is waiting for some other user's input	Assignee
<b>Completed</b>	The task has been finished	Assignee
<b>Rejected</b>	The task has been aborted by the assignee	Assignee
<b>Canceled</b>	The task has been aborted by the assigner	Manager

**Important** – as shown in the table above, only the Project Manager may **Assign** or **Cancel** a task. The assignee is responsible for updating the status as soon as applicable. Once assigned, the manager will not normally change the status of an action, but may if circumstances warrant. If a member would like a new action to be added, he is to contact the Project Manager with this request.

Once a task is **Assigned** by the Project Manager, it is the assignee’s responsibility to review the task and the associated due date and either **Accept** or **Reject** the task. If rejected (either task or date), the reason must be noted in the Comments column.

If an action is **Blocked** at any time, the assignee must note the reason for the blockage in the Comments column.

After a task is **Completed**, the Project Manager will move the task to the **Closed Items** folder for archiving.

**Due Date** – The date at which the task is to be completed. This date is assigned by the Project Manager and agreed upon by the assignee by accepting the task. Only the Project Manager may change the due date. If during the course of the action, the assignee feels that the date cannot be met, he must contact the Project Manager and negotiate a revised date. This should be done without delay to minimize disruption of the project and the tasks of others.

Overdue actions will be highlighted in **RED** text by the Project Manager. It is the responsibility of the Project Manager to alert the assignee of any overdue actions and to

mitigate. A revised due date should be negotiated such that adverse impact on project schedule is avoided or minimized.

Task – A brief but concise description of the task. Normally written by the Project Manager (when assigning the task) but may be amended by the assignee at any time if clarification is needed.

Comment – Any additional, useful information relating to the task. Comments may be added by either Project Manager or assignee at any time during the course of working the task. The Comment section is also used to record reasons for canceling, blocking or rejecting a task.

Assigned – The person responsible to fulfill the task.

Completed – The date upon which the status of the task has been changed to Completed. This is filled out by the assignee.

## ***Maintenance***

The Project Manager has the primary responsibility for the accuracy and maintenance of the Action Register. All Team members are responsible for reviewing, accepting and updating the status of their tasks. For all blocked actions, the affected Team member is expected to monitor the blocking action in order to start their task as soon as the blocking action has been completed.

## ***Summary***

### **Responsibilities of the Project Manager**

- Assign actions and inform the assignee.
- Monitor newly assigned actions to ensure timely acceptance.
- If an action is rejected, resolve reason for rejection as soon as possible.
- Monitor all actions on a regular basis. Mark overdue actions in RED and inform the assignee that an action is overdue. Negotiate a new due date.
- Cancel any superfluous task and inform assignee without delay.
- Ensure blocked actions will not threaten project schedule.
- Move all completed tasks to the closed folder.
- Ensure that all Team Members use the Action Register per these guidelines.

### **Responsibilities of the Team Members (Assignees)**

- Review assigned tasks and due date, and accept or reject in a timely manner.
- Understand the scope of the task and endeavour to meet the due date. Seek clarification if needed and do not accept a task if meeting the due date is in doubt.
- If an action is rejected or blocked, clearly state the reasons in the Comments column.
- Update Action Register as soon as the status of an action changes (e.g. working, blocked, completed).
- Inform the Project Manager without delay if, for any reason, an accepted task cannot be completed by the due date.
- Inform the Project Manager without delay if, for any reason, an accepted task cannot be fulfilled or if assistance is needed.