**Data Item Description**

**Action Item and Issue Status Report**

**PM273**

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| **Action Item and Issue Status Report** | **PM273** |

**Purpose**

The Action Item and Issue Status Report is intended to record all Action Items and issues relating to or arising from the Subcontract. The Action Item and Issue Status Report records, tracks, monitors and manages Action Items and issues arising from correspondence and Meetings (see definition below) and provide a status against each.

**References**

This DID must be read in conjunction with Schedule A (General Conditions) and the corresponding SOW reference.

**Preparation Instructions**

This Data Item shall comply with the general format, content and preparation instructions set out in Part 1 (Introduction) and Part 2 (Project Management) of the SOW.

**Format and Content**

Field Descriptions using an Excel spreadsheet or Access Database

1. Project description: (alpha numeric– 25 digits/characters);
2. Subcontract #: (alpha numeric – 15 digits/characters);
3. Covering Purchase Order #: (alpha numeric – 20 digits/characters);
4. Name of Supplier (text field – 25 characters);
5. Purchaser’s SWBS number (text filed – 10 characters)
6. Criticality of the Action Item / Issue (numeric field – 2 digits) criticality measured from 1 to 3 where 1 means ‘low’, 2 means ‘moderate’ and 3 means ‘high’);
7. Action Item Number (alpha numeric – 16 digits/characters) as follows:

|  |  |  |
| --- | --- | --- |
| DDMMMYY-xxMT-MTN | | |
| Where |  |  |
| DDMMYY | = | Date of Action Item arose |
| xx | = | Meeting type where:  xx means  PM = Project Management  ENG = Engineering (includes  ILS = Integrated Logistics Support  QA = Quality Assurance  OPS = Operations  COM = Commissioning, Test & Trials  FIN = Finance  SEC = Security  HSE = Health, safety and the Environment  IRB = Industrial and Regional Benefit  LOG = Logistics  IT = Information Technology and Information Management  PLA = Planning  EST = Estimating  PRO = Procurement  OTH = Other  and |
| MT | = | Meeting |
| MTN | = | Meeting number (i.e. 001, 002, 003, etc.…) |
| AIN | = | Action Item number within the same MT (i.e. 01, 02, 03, etc.…) |

*Examples:*

*150317-PMMT-007-03 = the 3rd Action Item recorded in the 7th Project Management Meeting held 15 Mar 17*

*120318-ENGMT-013-11 = The 11th Action Item recorded in the 13th Engineering Meeting held 12 Feb 18*

8 Action Item SOW identifier (numeric – 2 digits), where:

1. represents Introduction;
2. represents Project Management (PM);
3. represents Engineering (ENG);
4. represents Integrated Logistics Support (ILS);
5. represents Quality Assurance (QA);
6. represents Operations (OPS);
7. represents Commissioning (COM);
8. represents Finance and Insurance (FIN)
9. represents Security (SEC);
10. represents H S & E (HSE);
11. represents Industrial and Regional Benefits (IRB);
12. represents Logistics (LOG)
13. represents CM/DM;
14. represents Planning (PLA);
15. represents Estimating (EST); and
16. represents Procurement.

9 A column to identify the action item to the relevant DID

*Examples:*

Project Execution Plan would be ‘PM250’

Engineering Level 0 Guidance data would be ‘E001’

1. Description of System/Equipment/Brief: (text field – 25 characters. Same identification as in the Agreement);
2. Action Item / issue description (text field – 256 characters);
3. Company or organisation of Actionee (text field – 25 characters);
4. Identity of Actionee responsible for closing the Action Item / issue (text field);
5. Date Action Item / issue opened (date field);
6. Committed closure date for completion of the Action Item / issue(date field);
7. Date Action Item / issue actually closed (date field);
8. Reference to closure action, e.g. Letter, Meeting etc., date, paragraph reference etc.…;
9. Comments field 1 (text - field 256 characters);
10. Comments field 2 (text - field 256 characters);
11. Ageing field – (numeric - field 3 numeric characters (how long has the Action Item / issue been outstanding))

The Action Item and Issue Status Report shall enable the Action Items /issues to be sorted on any single or combination of fields and permit *pro forma* and ad hoc reports and metrics to be generated.