Issue & Action Register

Issue & Action Register *Guide*

A guide to completing the Issue & Action Register

Strategic Capital, Infrastructure and Projects

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Issue & Action Register

Federation
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Issue No.

Enter the next number in sequence. Ensure you have the sheet sorted by this column and filters removed. See section on 'Auto Filter' feature in helpful hints for information on working with filters.

Date Issue Raised

Enter the date the issue was added to the log. This must be entered in the format DD/MM/YY.

Areas and Categories

Areas and Categories are designed to be used with the 'Auto Filter' feature in MS Excel and are user-definable depending on your project requirements. Areas should be High level, Categories Low level. Select an area and a category from the drop down lists (if you need to add to the drop down lists, click on the respective column heading).

Issue Details

Enter the precise details of the issue.

Action Source

Enter the source of the issue where applicable. Eg. DD/MM/YY Technical Workshop.

Originator

Enter the name of the person who raised the issue from the drop-down list. (If you need to add a new name, click on the Originator column heading.)

Owner

Enter the name of the person who will be investigating and leading the resolution of the issue from the drop-down list. (If you need to add a new name, click on the Owner column heading.)

Issue Status

You MUST NOT try to enter anything into this self-calculating column. When a Date Issue Raised date is input, the status is set to 'Open'. When a Completion Date is entered, the status changes to 'Closed'.

Priority

Choose High, Medium or Low from the drop-down list where:

1. High = Target date between 1-7 days,

2. Medium = Target date between 8-14 days and

3. Low = Target date > 14 days.

Notes/Proposed Resolution

Enter the precise details of the proposed resolution ensuring the intended steps to resolve the action are clearly stated.

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Target Date

Enter a target date for the issue to be completed. This must be entered in the format DD/MM/YY.

Days Left

You MUST NOT try to enter anything into this self-calculating column. If the target date is today, Days Left will show in GREEN. If there are 1-7 days before the target date, Days Left will show in YELLOW. If there are more than 7 days until the target date, Days Left will show as Regular text.

Days Overdue

You MUST NOT try to enter anything into this self-calculating column. When the target date is earlier than today's date and there is no completion date, the Days Overdue will show in RED. They will remain RED if the completion date is after the target date. However, once you mark the issue status as CLOSED, the overdue issue will no longer show on the Issue Summary worksheet.

Completion Date

Enter the date the issue is actually completed. This must be entered in the format DD/MM/YY.

Actual Resolution

Enter the precise details of the actual resolution ensuring it is clear as to what the final outcome was.

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Helpful hints

Adding Extra Rows

If you need to add a new line to the Risk Log - Choose Tools>Protection>Unprotect Sheet and click on OK. Do NOT just insert a new row, as this will not include the required formulae and therefore what you enter in the row will not be included in the calculations that feed the Risk Summary metrics. Instead, copy the previous line (Ctrl+C), press the right mouse button and choose 'Insert Copied Cells'. This will ensure all the formulae and formatting are copied to the new row. Protect the sheet again afterwards. You do not need to put in a password.

Printing the Workbook

By default the page size of the Title Page, Risk Log and Risk Summary worksheets is A4. If you have access to an A3 printer, it is recommended that you print on this page size. Note: A3 will only be available for selection when you have a printer driver for an A3 printer selected. Also, before printing it is recommended that you filter on the Risk Status of 'Open' and set the Print Area to only include the rows that contain Open actions.

Using the AutoFilter feature

Remove the Protection from the worksheet by choosing Tools>Protection>Unprotect Sheet and clicking on OK. Then select row 7 and choose Data>Filter>AutoFilter. A number of drop-down boxes will appear along this row. To filter out any closed Risks, choose 'Open' from the Risk Status drop-down box. To just show open Risks for a particular person, choose their name from the Owner drop-down box. Once printed, remove the AutoFilter by choosing Data>Filter>AutoFilter.

Issue & Action Register

Issue & Action Register example – use excel version

[Project Name] - Issues & Actions Log																
Issue No. (Req'd)	**Date Issue Raised (Required)**	**Area (Optional)**	**Category (Optional)**	**Issue Details (Required)**	**Issue Source (if applicable) (Optional)**	**Originator (Required)**	**Owner (Required)**	**Issue Status (Auto)**	**Priority (Required)**	**Notes / Proposed Resolution (Optional)**	**Target Date (Required)**	**Days Left (Auto)**	**Days Overdue (Auto)**	**Completion Date (Required)**	**Actual Resolution (Required)**	