

ACTS Users Group Meeting
March 1, 2005
Building 3017, Room 29

Purpose: The purpose of this meet was to establish a ACTS User's group consisting of users from across the laboratory to discuss implemented and needed changes in ACTS.

An agenda was provided. Angela Barnard was the host for the meeting.

Attendance Sheet:

<u>Number</u>	<u>Name</u>	<u>Organization</u>	<u>Phone Number</u>	<u>User Id</u>
1	Angela Barnard	QSD, ACTS Tech. Lead	241-9669	AH3
2	Ron Cornwall	SNS, Safety	576-4309	R2I
3	Jeff Long	LPD (F&O)	574-5324	LNG
4	Les Ginn	DOE	576-7317	G2L
5	David Carden	DOE	576-9262	2CD
6	Denise Saunders	EPWSD	576-9475	XAN
7	Patty Cox	F&O, Strategic Planning	576-4183	PCX
8	Mary Kiser	AMAS	574-4207	XKZ
9	Teresa Childs	RTSSD, ACTS Programming lead	576-5388	TAZ
10	Kat Eldridge	QSD, ACTS System Adm.	574-1726	KWE

ACTS User's Group Charter

A draft charter was provided to the group prior to the meeting for comment. Input was requested and some group members provided minor editorial changes after the meeting. The group agreed that the charter was acceptable.

ACTS Improvements

The following ACTS improvements were discussed by Teresa Childs and demonstrated by Kat Eldridge:

- a. Option to view others "MY ACTS" by entering badge number
- b. Project/Event grouping and reporting functionality – One group member asked how would individuals know when to use this feature.
- c. CATS designation so users cannot change dates on actions that are tracked in CATS – [One group member asked who monitored this action. The assessment owner/delegate is responsible for monitoring these actions.](#)
- d. Org Delegates & Super Delegates ability to upload additional attachments once items are closed
- e. IR/ER comments are now viewable via status history
- f. Web-Whos link added to ACTS Summary Reports
- g. List of External Reviewers added to Help file

Decision Points for Users Group

- a. Statistical Reporting on Associated Actions SCR #299 – Actions tied to multiple conditions are counted multiple times in "Open Actions" reporting and creates a

- problem for users. There is a statistics text from reports that warns user not to use report for statistics. Does this text need to be removed? (Yes / No). The group recommended that the action be listed one time with the associated conditions. The text could then be removed. This will require a major programming effort.
- b. Need for "Private" area that will not count in statistics. Need stand-alone action tracking mechanism that's not associated with an assessment. The group recommended that a graded approach be applied to assessments within ACTS. For example a low level assessment (e.g. eyewash checks) would not be held to the same rigor as a high level assessment (e.g. DOE). It was suggested this functionality be accessible at the directorate and division level with access constraints established.
 - c. Need for "other" flag (besides PAAA & CATS) where date changes cannot be made. It was recommended that DOE assessments and ORPS category 2 or greater also be flagged so that dates could not be changed. This change would be at the condition level. Will need to determine if flow-down is needed to action level or if actions should be treated separately.
 - d. Allow users to close a condition without having associated actions (SCR#314). The group voted "Yes" to this item.
 - e. Do we need priority codes at the condition and/or action level? This was discussed and it was determined that additional input would be required.
 - f. Do we need a code in "buildings" that is either "ORNL wide" or "site wide"? The group voted "No" to this item.
 - g. E-mail reminders: Propose the following reminder messages for ACTS objects at the proposed intervals
 - 14 days before the due date
 - 7 days before the due date
 - 1 day before the due date
 - 1 day after the due date
 - 7 days after the due date
 - 14 days after the due date
 - 30 days after due date to continue monthly (This was recommended to be added to the e-mail notification.)

The group voted to leave the e-mail reminders as they were and redirect staff to the mail preference section in ACTS. However, the group recommended that ACTS objects that have been awaiting acceptance or approval for 7 days (including the IR and ER approvals), ACTS objects that have been in "Draft" status and those that have been on hold for an extended period of time (SCR#269) have an e-mail reminder.

Other ACTS Issues

- a. One group member stated that the steps that are to be performed by an independent reviewer were not intuitive. This also is applicable to users accepting an action and not realizing they need to go to the edit feature to close the action/condition.
- b. It was recommended that corrective action plans be looked at/validated by Independent Reviewers. If the IR is identified, need to determine how ACTS can automatically change status to "Submitted to IR".

ATS Survey

A survey was handed out to the group members to obtain a baseline of customer satisfaction. The survey was sent to 40 other users with a due date of 3/15/05. Results will be discussed at the next meeting.

Next Meeting

The group will meet monthly for the next few months and then determine a needed frequency. The next meeting is tentatively scheduled for 4/5/05.