ACTION ITEM REGISTER

Task Management

Task management is the process of identifying and monitoring the progress of work being completed on a day to day basis. Successfully managing the delivery of projects requires utilising reliable tools that allow you to keep a record of all projects, regardless of their progress or status, to ensure no items are missed or overlooked.

The tools or systems you utilise to track and manage tasks need to be easy to use and easy to access, and records must be updated regularly to ensure the integrity of the information recorded and that milestones are achieved.

Action Item Register

An Action Item Register is a tool often utilised to record and manage the implementation and delivery of multiple projects, some which may be related and others that stand alone.

Updated regularly, an Action Item Register provides a log of all potential, active and completed project tasks, with each allocated a key team member / owner to oversee delivery of the task, in addition to a due date and priority.

To be utilised effectively, an Action Item Register should be regularly reviewed in a team environment, such as during team meetings, to update the status and progress of each task and ensure projects are completed in a timely manner.

Dewick & Associates' Action Item Register Template - User Guide

Dewick & Associates' Action Item Register Template is easy to use and has been designed to track the following elements *(refer to the example on the last page)*:

Column Headings	What Does This Mean?
Item Number	A reference number unique to each task (e.g. a number incrementing by 1, such as 0001, 0002, 0003, etc.)
Date Created	The date on which the task was first created
Description	A short description / title of the task
Priority	Indicates urgency of the task (e.g. the task priority may be Low, Medium, High or Urgent)
Owner	The team member who will be responsible for ensuring the task is completed
Status	Indicates the progress of the task (e.g. the task may be Open, Closed or On Hold)
Due Date	The date the task must be completed. If a project is *On Hold* it may not have a Due Date
Date Closed	When a task is *Closed*, enter a date reflecting when the task was completed / finalised
Notes	Brief commentary to support the status / details of the task

Updating Drop-Down Menus

The drop-down menus contained within Dewick & Associates' Action Item Register Template can be updated to correlate with how you and / or your organisation prefer to manage tasks.

You'll notice that there are two worksheets within the template, one entitled **Action Item Register** and the other **Drop Downs**; changes can be made within the sheet called **Drop Downs** to personalise the template.

Priority

Cells A2 to A5 in the **Drop Downs** worksheet populate the drop-down menu of the **Priority** column in the **Action Item Register** worksheet. If you type over the options in these cells (A2 to A5), the options of the associated drop-down menu will change, however changes have to be made within the cell range of A2 to A5. You can add or delete cells within the cell range by right clicking within the range and selecting either the **Insert** or **Delete** options that appear. You will either **shift cells down** to insert cells or **shift cells up** to delete cells.

Owner

Cells B2 to B7 in the **Drop Downs** worksheet populate the drop-down menu of the **Owner** column in the **Action Item Register** worksheet. If you type over the options in these cells (B2 to B7), the options of the associated drop-down menu will change, however changes have to be made within the cell range of B2 to B7. You can add or delete cells within the cell range by right clicking within the range and selecting either the **Insert** or **Delete** options that appear. You will either **shift cells down** to insert cells or **shift cells up** to delete cells.

Status

Cells C2 to C4 in the **Drop Downs** worksheet populate the drop-down menu of the **Status** column in the **Action Item Register** worksheet. If you type over the options in these cells (C2 to C4), the options of the associated drop-down menu will change, however changes have to be made within the cell range of C2 to C4. You can add or delete cells within the cell range by right clicking within the range and selecting either the **Insert** or **Delete** options that appear. You will either **shift cells down** to insert cells or **shift cells up** to delete cells.

If you would like further advice on how to utilise Dewick & Associates' Action Item Register Template, please do not hesitate to give Kath Angus a call during office hours (+61 413 307 739) or send her an email (katha@dewick.com).

Dewick & Associates Action Item Register Template Example

Item No	Date Created	Description	Priority	Owner	Status	Due Date	Date Closed	Notes
0001	01-May-20	Yearly review of company policies	High	Phil D.	Closed	31-May-20	21-May-20	
0002	07-Jun-20	Identify construction expos	Low	Kath A.	On Hold			
0003	07-Jul-20	Upload case studies to website	Medium	Kath A.	Closed	10-Jul-20	09-Jul-20	
0004	17-Jul-20	Finalise newsletter	High	Louise G.	Closed	22-Jul-20	21-Jul-20	
0005	27-Jul-20	Review and approve printing quotes	Medium	Phil D.	Closed	14-Aug-20	29-Jul-20	
0006	27-Jul-20	Renew public liability Insurance	Urgent	Louise G.	Open	14-Aug-20		
0007	28-Jul-20	Send DL to do lists for printing	Medium	Kath A.	Closed	14-Aug-20	30-Jul-20	
0008	28-Jul-20	Make website changes	Medium	Kath A.	Open	14-Aug-20		
0009	29-Jul-20	Finalise sales report	High	Phil D.	Closed	31-Jul-20	30-Jul-20	