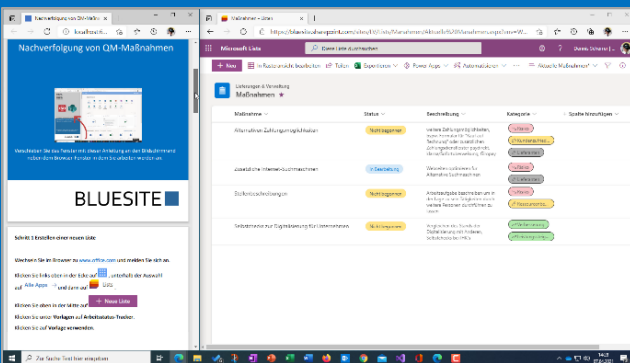also applicable to
ISO 14001:2015,
ISO 27001:2013,
ISO 45001:2018
and ISO 50001:2018

Quality management with Microsoft Office

Configure action list

Create a list for actions in the quality management system (ISO 9001),
based on Microsofts Work progress tracker template with a modern
board view and samples
Duration approx. 35 minutes; You need an Office 365 subscription;
Sample data included here in the instructions.

Place the window with these instructions next
to the browser window in which you will work.

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Create action list

Using your browser, go to www.office.com and log in.

In the upper-left corner, click ⚏ **(App launcher)**, click All apps → , and then click 📑 Lists .

At the top center click **+ New list**.

In the **Templates** section, under the **From Microsoft** tab, click **Work progress tracker**.

Click **Use template**.

Replace the text in the **Name** field with *"Actions"*.

Copy the text *"Actions planned to deal with risks and opportunities (ISO 9001:2015, Section 6.1), as well as actions to meet customer requirements and increase customer satisfaction (ISO 9001:2015, Section 10)"* and paste it into the **Description** field.

Choose any **color** and **icon**.

For **Save As,** select the team site of your quality management system.

Note: If you don't want to use a team site, select **My Lists** for **Save As**.

Leave the check mark next to **Show in site navigation** checked and click **Create**.

Adjust columns

Click the **Work item** column name, select **Column settings**, and click **Rename**.

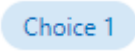Replace the text in the **Name** field with "*Action*" and click **Save**.

Click the column name **Description**, click **Column settings**, and then click **Edit**.

Replace the text in the **Description** field with *"Detailed description of the action, in particular if non-conformity is corrected"* and click **Save**.

Click the column name **Category**, select **Column settings**, and click **Edit**.

Replace the text in the **Description** field with "*Kind of action or hoped for result*".

Under **Choices**, delete all by clicking on the corresponding ✕.

Click ✛ Add Choice , then on the ⬭ Choice 1 pill above and add one by one:

1. "Correction"
2. "Risk"
3. "Customer satisfaction"
4. "Improvement"
5. "Opportunity"
6. "Monitoring/Measurement"
7. "Acquire competence"
8. "Operations process"
9. "Development process"
10. "Suppliers"
11. "Enhancement"
12. "System change"
13. "Need for resources"
14. "Prevent"

Click **Save**.

Click the column name **Category**, select **Column settings**, and click **Format this column**.

From the **Choose Column** box, check that **Category** is chosen.

Under **Choice pills**, follow the **Edit styles** link.

In the 1st section, click right on ✎ and follow the link **More styles**.

Choose suitable options.

At the top of **Change style**, click ←.

Repeat these three steps for all categories.

Click **Save**, and then click **Close**.

Click the column name **Progress**, select **Column settings**, and click **Edit**.

In the **Description** field, add the text *"progress or status of this action"*.

Uncheck **Can add values manually** and click **Save**.

Click the column name **Priority**, select **Column settings**, and click **Hide this column**.

Click the column name **Start date**, select **Column settings**, and click **Hide this column**.

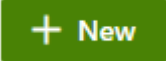Click the column name **Due date**, select **Column settings**, and click **Hide this column**.

Click the column name **Assigned to**, select **Column settings**, and click **Hide this column**.

Click the column name **Notes**, click **Column settings**, and then click **Edit**.

Replace the text in the **Name** field with "*Evaluation*".

Replace the text in the **Description** field with "*Evaluation of the effective- ness of this planned action, see ISO 9001:2015, Section 6.1.2 b) 2)*" and click **Save**.

Drag the column header **Progress** between the **Action** and **Description** column headers.

Click **+ New**

Click in the upper-right corner **(Edit form)** and **Edit columns**.

Uncheck **Priority**, **Start date**, **Due date**, and **Assigned to**.

Drag the column header **Progress** between the **Action** and **Description** column headers.

Click **Save**.

Note: Changes are not displayed immediately.

Click ✕ Cancel.

Create View

Above the list on the right, click **All Items**, and then click **Create new view**.

Under **View name**, type *"Progress"*, select Show as **Board.**

At **Organize board by** select **Progress**.

Leave the check mark for **Make this a public view** and click **Create**.

Above the list on the right, click ⊞ Progress ⌄ **(Switch view options)**, and then click **Format current view**.

Under **Card Designer**, follow the **Edit card** link.

Uncheck the **Progress**, **Description** and **Evaluation**.

Uncheck **Show column names as labels**.

Click **Save**, and then click **Close**.

Add samples

Click **+ New**

In the **Action** field**,** add *"Create job descriptions"*

Copy the text *"Record work items, each with a short description in an Excel spreadsheet; Categorize tasks roughly in an additional column according to job profiles"* and insert it in the **Description** field.

For **Category**, select *"Enhancement"* and *"Need for resources"*.

Copy the text *"a categorized list of recurring work items allows tasks to be performed by other people and thus increase performance"* and paste it into the **Evaluation** field.

Click **Save**.

Click **+ New**

In the **Action** field, add *"Cost plan compliance"*

Copy the text *"the cost plan adopted at the beginning of the financial year will be adhered to, in particular travel expenses, training and advertising costs"* and paste it into the **Description** field.

Select *"Monitoring/Measurement"* as **Category**.

For **Progress**, select **In progress**.

Copy the text *"that adheres to the cost plan helps to achieve a positive annual result and prepare the company for a sale"* and paste it into the **Evaluation** field.

Click **Save**.

Click **+ New**

In the **Action** field, add *"Self-checks for digitization"*

Copy the text *"Determine and document the status of digitization with self-checks at IHK´s; Attach results here to the action as a file"* and paste it into the **Description** field.

Select *"Enhancement"* and *"Improvement"* as **Category**.

Copy the text "*the free offer for members provides a rough orientation; the result itself does not improve anything - if necessary further actions will follow*" and insert it in the field **Evaluation**.

Click **Save**.

Questions? Just write an e-mail to info@bluesite.de

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