

Initiative Rules and Samples

Rules. (*Required fields are marked with a Red background colour*)

Field Name	Description	Rules	Exception Handling	Values to be placed	Default Values	Field Type
Initiative Number	This field contains the unique Number/Code of a Initiative	Must be unique for non-deleted initiatives (can use the same InitiativeNumber as a deleted idea). 1-20 characters.	If the records data exceeds 20 characters, the record will NOT be imported.		If the fields value is either blank or "NEW" then the number will be generated from the relevant department or subdepartments sequence which can be setup in the admin module.	Variable Character (20)
Title	This field contains the title of the initiative	Titles cannot be duplicated. Titles can contain alphanumeric characters.	Initiative form titles cannot be duplicated. Initiative titles must be unique in order for the initiative to be imported.	N/A	N/A	Variable Character (200)
Description	This field contains the description of the initiative	Can contain alphanumeric characters	The description for the initiative does not have to be captured for import to occur	N/A	N/A	Variable Character (1000)
Workstream Number	The workstream that is the parent of this initiative	Must be a workstream number that already exists in the system, or is contained in the workstream sheet in this workbook	Either one or both the Workstream Number and the Team Number must be supplied or else the record will not be imported	N/A	N/A	Variable Character (20)
Team Number	The team that is the parent of this initiative	Must be a team number that already exists in the system, or is contained in the team sheet in this workbook	Either one or both the Team Number and the Workstream Number must be supplied or else the record will not be imported	N/A	N/A	Variable Character (20)
Owner	This field contains the owner of the initiative.	The users need to be created on the system in order to be identified as owners of an initiative	This field can be blank, the record will be imported.	User	First user on the list of the system	Lookup (Users)
Facilitator	This field contains the faciliator of the initiative.	The users need to be created on the system in order to be identified as facilitators of an initiative.	This field can be blank, the record will be imported.			

Situation	This field describes the situation preceding the implementation of an initiative.	Can contain alphanumeric characters	The situation for the project does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)
Opportunity	This field describes the complication/opportunity preceding the implementation of an initiative.	Can contain alphanumeric characters	The complication/opportunity for the project does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)
Solution	This field describes the solution preceding the implementation of an initiative.	Can contain alphanumeric characters	The solution for the project does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)
InitiativeDefinition	This field contains the Initiative Definition of the initiative.	The Initiative Definition needs to be created on the system in order to be identified as an Initiative Definition.	This field can be blank, the record will be imported.	N/A	N/A	Lookup (Initiative Definitions)
AccessLevel	The Access level (Initiative level Permissions) that will be granted to the initiative	If no value is provided a default value will be used.	If left blank, it will use a default value (See Default Values column)	Default \ Confidential \ Global	Default	Lookup (AccessLevels)
Status	This field contains the Status of the initiative	If no value is provided a default value will be used.	If left blank, it will use a default value (See Default Values column)	Active \ On Hold	Active	Lookup (InitiativeStatuses)
TargetDate	Target date for a stage to begin.	Calendar date, which states when a stage will begin.	N/A	Any date.	N/A	Date time (YYYY-MM-DD)
RevisedDate	Revised target date for a stage to begin.	Calendar date, which states when a stage will begin.	N/A	Any date.		Date time (YYYY-MM-DD)
ActualDate	Actual date a stage to began.	Calendar date, which states when a stage will begin.	This value will never be used, it will always be replaced by the revised date if one exists or the target date if one exists or it will be left blank	Any date.	N/A	Date time (YYYY-MM-DD)
Tags	This field contains tag name/s of the activity	Tag names length must be greater than 3 and cannot be duplicated. Tag name can contain alphanumeric	This field can be blank, the record will be imported.	Comma separated list	N/A	Variable Character (255)