

CAST-AED - Action Plan

On this page:

- [Introduction](#)
 - [Permissions required to interact with the Action Plan](#)
- [Viewing violations \(objects\) that have been added to the Action Plan](#)
- [Adding objects to the Action Plan](#)
- [Removing objects from the Action Plan](#)
 - [Using the Action Plan](#)
 - [Using the Quality Investigation view](#)
- [Updating objects that are already present in the Action Plan](#)
- [Exploiting the Action Plan via the legacy CED and beta APO](#)

Target Audience:

- Consumers of the information (i.e. those that will be using the CAST Application Engineering Dashboard)
- CAST AI Administrators



Summary: This page provides instructions for managing **Actions** (in the **Action Plan**) in the **CAST Application Engineering Dashboard**.

Introduction

Like its predecessor the legacy **CAST Engineering Dashboard**, the CAST Application Engineering Dashboard features the ability to add and remove objects to and from an "**Action Plan**". An Action Plan is simply a list of objects (i.e. "violations") that have been **selected for action in the next snapshot generation process with a priority level assigned to them**. Users can then use the list to focus their re-mediation work. Think of it as a "to do list" - i.e. objects that require work to remove the violation flagged by CAST AIP.




The Action Plan is available when viewing data from a **previous snapshot**, however, the ability to change the action plan (add/edit objects /violations) is only available from the **most recent snapshot**.

Permissions required to interact with the Action Plan

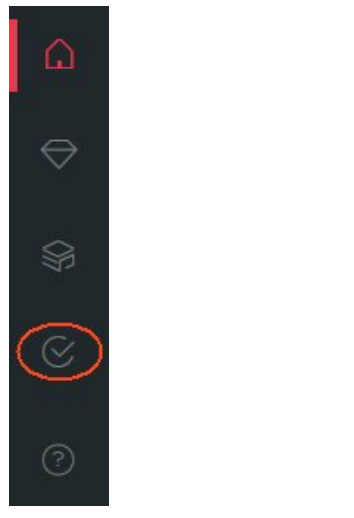
Feature	Permission required
To edit Actions - i.e. add /remove objects/violations to /from the Action Plan .	Your user login must have the QUALITY_MANAGER role. This can be assigned at user level (when using Default Authentication mode) or via user or group (when using Standard LDAP authentication). Please see CAST-AED - Configuring user authentication for more information. You can view Actions in read-only mode without the QUALITY_MANAGER role.

Viewing violations (objects) that have been added to the Action Plan

To view objects that have been added to the Action Plan, there are two methods:

Method	Image
From the " home " or landing page , click the default Action Plan tile.	 A blue square tile with a white checkmark icon in the top left corner. The text "ACTION PLAN" is at the top, a large number "9" is in the center, and "Violations for Action Plan" is at the bottom.

From the [Side Menu bar](#), click the following icon:



The Action Plan list will then be displayed:


Action Plan

Detail of actions ✓ 0 🕒 0 new 4 ↓

				QUALITY RULE	OBJECT NAME LOCATION
<input type="checkbox"/>	●●○○	new		Avoid Procedures using an Insert, Update, Delete, Create Table or Select without including error management	default.CASTPUBS.dbo.CallCreateSale
<input type="checkbox"/>	●●●○	new		Avoid Procedures using an Insert, Update, Delete, Create Table or Select without including error management	default.CASTPUBS.dbo.CreateNewInvoice
<input type="checkbox"/>	●○○○	new		Avoid Procedures using an Insert, Update, Delete, Create Table or Select without including error management	default.CASTPUBS.dbo.CreateNewOrderLine
<input type="checkbox"/>	●●●●	new		Avoid Procedures using an Insert, Update, Delete, Create Table or Select without including error management	default.CASTPUBS.dbo.CreateSale

Key:

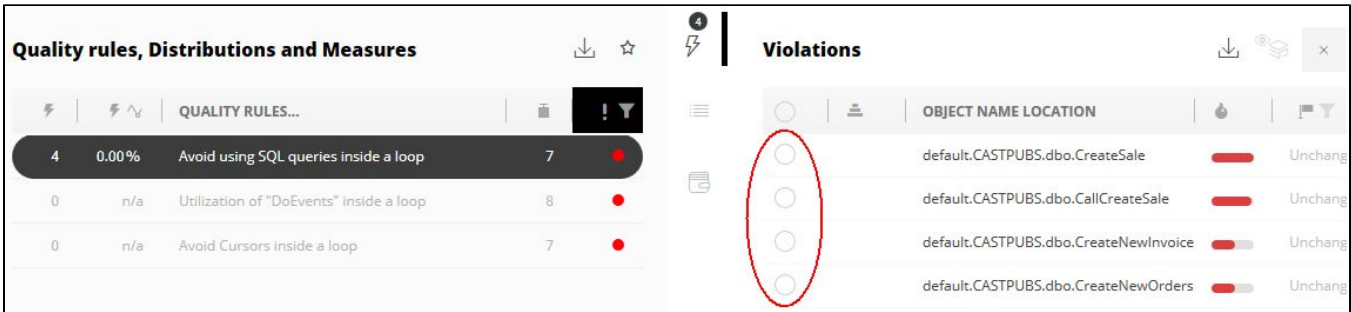
Item	Description
✓ 0	Resolved: Total number of objects in the Action Plan that have been corrected and are no longer violating the rule since the last snapshot was generated - i.e. the object has been remediated.
🕒 0	Pending: Total number of objects in the Action Plan that are STILL violating a rule since the last snapshot was generated - i.e. the problem has not been fixed
new 8	New: Total number of objects in the Action Plan that have been added to the list since the last snapshot was generated - their status will be checked during the next snapshot generation.
<input type="checkbox"/>	<p>This check box allows you to:</p> <ul style="list-style-type: none"> modify the object's priority in the Action Plan remove the object from the Action Plan if the issue has been resolved or you no longer need to remediate the issue. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>i Note that the check box is only visible if your login has the QUALITY_MANAGER role.</p> </div>
<div style="display: flex; flex-direction: column; gap: 5px;"> <div>●○○○</div> <div>●●●○</div> <div>●●●●</div> </div>	<p>Displays the priority given to the object when it was added to the action plan, ranging from:</p> <ul style="list-style-type: none"> Low (one dot) Moderate (two dots) High (three dots) Extreme (four dots)

Status	<p>Displays the status of the object in the Action Plan:</p> <ul style="list-style-type: none"> Resolved Pending New <p>See the sections in the table above which explain these statuses in full.</p>
Quality Rule	The name of the Quality Rule for which the object has been added to the Action Plan (objects can appear multiple times in the Action Plan).
Object Name Location	The name of and information about the object that has been added to the Action Plan for remediation.
	Use this option to export the contents of the Action Plan to an Excel file. See Exporting data to Microsoft Excel file format for more information.

Adding objects to the Action Plan

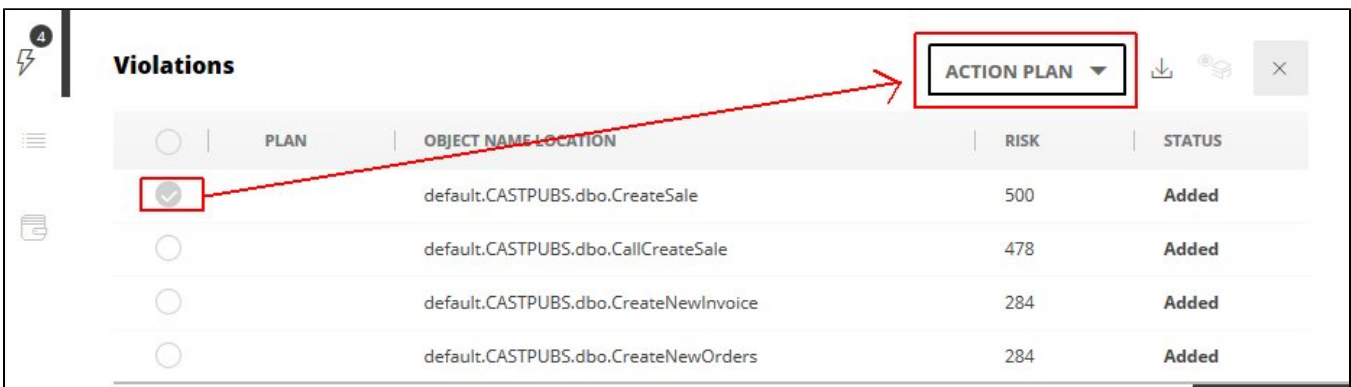
If you would like to add an object to the Action Plan:

- Drill down and select an item at Quality Rule, Distribution or Measure level
- A circular checkbox will be visible in each object description row (highlighted in the image below in a red rectangle) - if you do not see this circular checkbox, then your login does not have the **QUALITY_MANAGER** role:



OBJECT NAME LOCATION	RISK	STATUS
default.CASTPUBS.dbo.CreateSale	500	Unchang
default.CASTPUBS.dbo.CallCreateSale	478	Unchang
default.CASTPUBS.dbo.CreateNewInvoice	284	Unchang
default.CASTPUBS.dbo.CreateNewOrders	284	Unchang

- Place a check mark in the circular checkbox alongside the object that you want to add to the Action Plan - the **Action Plan** button will then become visible as shown below:



PLAN	OBJECT NAME LOCATION	RISK	STATUS
<input checked="" type="checkbox"/>	default.CASTPUBS.dbo.CreateSale	500	Added
<input type="checkbox"/>	default.CASTPUBS.dbo.CallCreateSale	478	Added
<input type="checkbox"/>	default.CASTPUBS.dbo.CreateNewInvoice	284	Added
<input type="checkbox"/>	default.CASTPUBS.dbo.CreateNewOrders	284	Added

- Now click the **Action Plan** button and select the **level of priority** you would like to assign to the object:

ACTION PLAN ▼

Select a priority

●○○○ Low Priority

●●○○ Moderate Priority

●●●○ High Priority

●●●● Extreme Priority

Remove From Action Plan

- In this example, we have selected the **High Priority** level - the **Plan** column is then updated with the new Action Plan status for the object:

⚡ 4
Violations
↓ 🔄 ✕

		PLAN	OBJECT NAME LOCATION	RISK ▼	STATUS
<input type="checkbox"/>	<input type="checkbox"/>	●●●○	default.CASTPUBS.dbo.CreateSale	500	Added
<input type="checkbox"/>	<input type="checkbox"/>	○	default.CASTPUBS.dbo.CallCreateSale	478	Added
<input type="checkbox"/>	<input type="checkbox"/>	○	default.CASTPUBS.dbo.CreateNewInvoice	284	Added
<input type="checkbox"/>	<input type="checkbox"/>	○	default.CASTPUBS.dbo.CreateNewOrders	284	Added

i Note that you can add multiple objects to the Action Plan **in one go** by using the multi checkbox to select all objects under the Quality Rule /Distribution/Measure:

⚡ 4
Violations

		PLAN	OBJECT NAME LOCATION
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	●●●○	default.CASTPUBS.dbo.CreateSale
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		default.CASTPUBS.dbo.CallCreateSale
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		default.CASTPUBS.dbo.CreateNewInvoice
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		default.CASTPUBS.dbo.CreateNewOrders

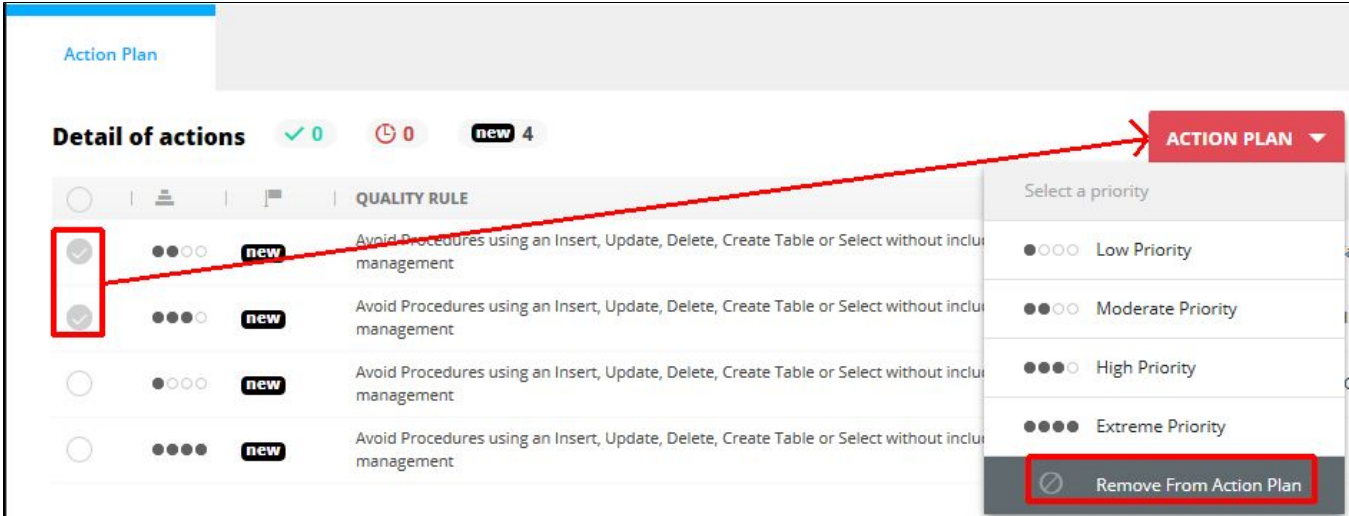
Removing objects from the Action Plan

If you would like to remove an object that has already been added to the Action Plan, you can do so as follows:

Using the Action Plan

The easiest method is to:

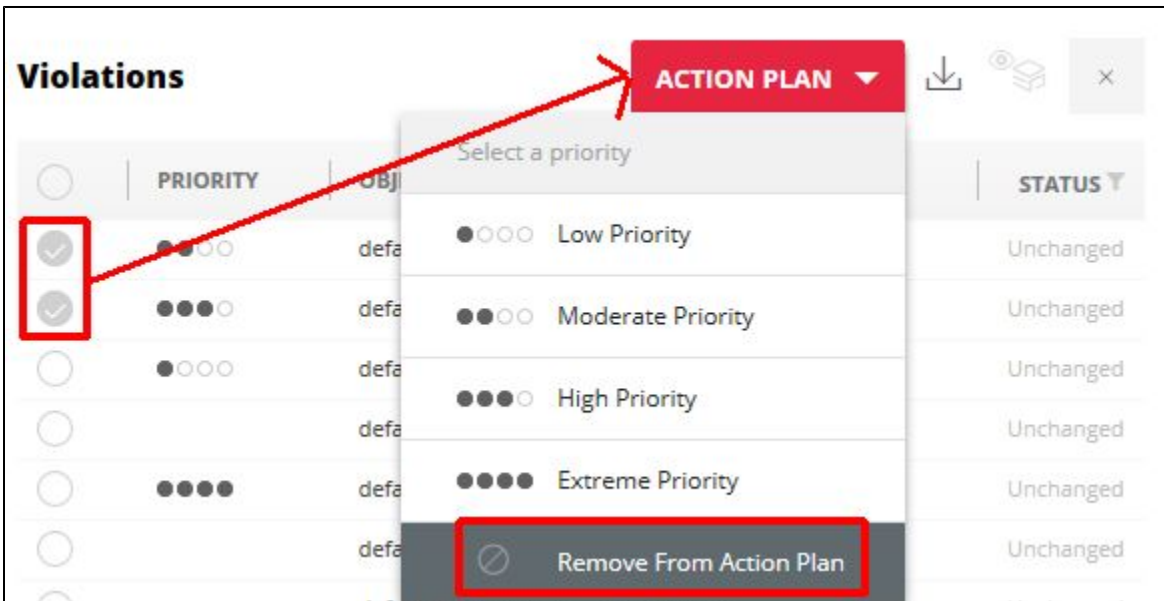
- Access the Action Plan from the **side menu bar**, or from the **Action Plan tile** on the "home" page
- Select the object or use the multi checkbox to select all objects under the Quality Rule/Distribution/Measure:



- Then click the Action Plan button and select the **Remove From Action Plan** option as shown above.
- All selected objects will now be reset and will no longer be part of the Action Plan.

Using the Quality Investigation view

- Drill down to the Quality Rule, Distribution or Measure level that contains the violations that you have added already to the Action Plan - the **Priority** column should be populated with a priority level to indicate that the violation has been added to the Action Plan.
- Select the object or use the multi checkbox to select all objects under the Quality Rule/Distribution/Measure:



- Then click the Action Plan button and select the **Remove From Action Plan** option as shown above.
- All selected objects will now be reset and will no longer be part of the Action Plan.

Updating objects that are already present in the Action Plan

If you have added specific objects to the Action Plan with a specific priority level, you can alter their priority level directly, without having to remove the object from the Action Plan and then re-add it. You can do this either from the **Action Plan itself**, or by drilling down to the **Quality Investigation view** (i.e. to the Quality Rule, Distribution or Measure level that contains the violations that you have added already to the Action Plan):

- Locate the object either in the **Action Plan** or in the **Quality Investigation view** - the **Priority** column should be populated with a priority level to indicate that the violation has been added to the Action Plan.
- Select the object or use the multi checkbox to select all objects under the Quality Rule/Distribution/Measure
- Then click the Action Plan button and select the **new Priority Level** you want to assign to the object.
- All selected objects will now be updated with the new Priority Level.

Exploiting the Action Plan via the legacy CED and beta APO

The Action Plan available in the CAST Application Engineering Dashboard is fully compatible (in other words, adding/removing objects in AED will be updated in CED and APO and vice-versa) with the existing Action Plan features available in:

- **CAST Engineering Dashboard (CED)** - see [Improvement - Action Plan](#)
- **CAST Action Plan Optimizer (APO)**