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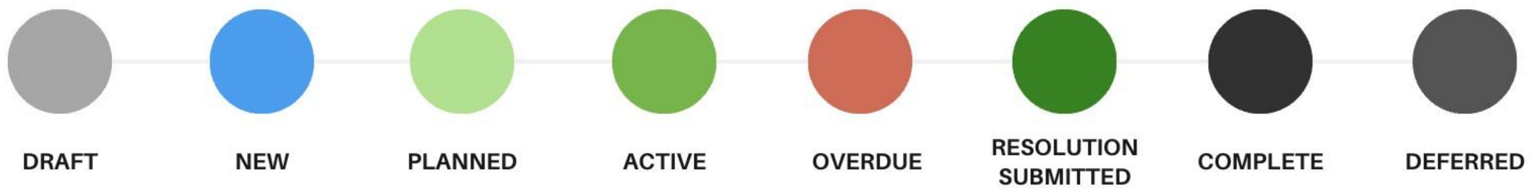
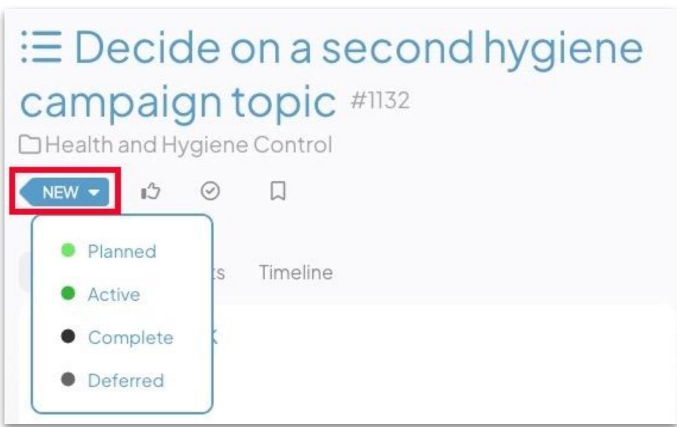
The Item Lifecycle

Use Item Statuses to track your improvement work from the initial submission to close out. Each Status marks a key stage in the Item Lifecycle.



Track an Item's Progress

Item Statuses indicate an Item's progress through its lifecycle. Use Statuses to quickly see if your work is submitted, in progress, closed, and more.



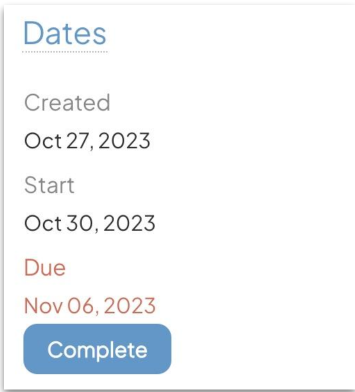
Use the Status drop-down to view an Item's current Status and transition it to a new Status.

Identify Bottlenecks

Extended time in a single Status may suggest a bottleneck in your workflow. Watch for Items that spend a lot of time in New, Overdue, or Resolution Submitted Status.

Set Timelines

Item transitions between Statuses are typically dated, informing you of when significant Status changes occurred. For example, an Item's Start Date indicates when it entered Active Status. System Dates help you set project timelines, compare work durations, and identify delays.



Example of Item Dates. You can easily see when the work started and that it is currently Overdue.

Report on Cycle Times

You can collect data on how long your improvement work remains in each Status using Cycle Time Reports.

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Item Statuses

There are 8 Item Statuses, each representing a different phase of the Item Lifecycle. In general, Items begin in New Status and end in Complete Status; however, Items don't need to follow this exact order. You can skip Statuses, revert to previous Statuses, and more.

DRAFT	When you initiate the creation of an Item but don't submit it, the Item assumes Draft Status. Drafted Items are only visible to their authors.
NEW	New Status indicates an Item has been recently submitted, but the team still needs to decide whether to work on the Item or close it. If an Item is New for too long, there could be a Bottleneck.
PLANNED	Planned Status indicates the team intends to work on an Item in the future but is not currently working on it.
ACTIVE	Active Status indicates the team is currently working on an Item. Active Items have a defined Due Date.
OVERDUE	Active Items with a Due Date in the past automatically transition into Overdue Status, indicating the work is behind schedule.
RESOLUTION SUBMITTED	Items will move into Resolution Submitted Status when you fill out the Resolution and submit it for approval.
COMPLETE	Complete Status indicates an Item has been closed, either because the work concluded or the team decided not to work on it.
DEFERRED	Deferred Status indicates the team has no formal plans to work on an Item but may want to reconsider in the future.

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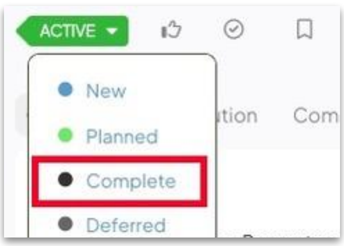
Completing the Item Lifecycle

When all work on an Item is finished, you will move the Item to Complete Status, the final stage of the Item Lifecycle. Complete Status indicates there is no more action needed on an Item. It will persist in the system as historical data that you can reference anytime.

1. Select Complete from the Status drop-down.

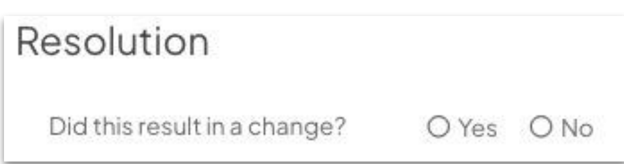


If Resolution is **not** enabled, the Item will move directly to Complete Status. However, many Items will have an extra step called the Resolution.

2. Fill out the Resolution.

The Resolution allows you to record information about the Item's outcome. It is vital for reporting on the impact of your improvement work and communicating why certain ideas weren't implemented.

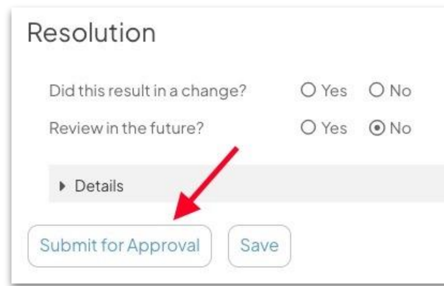
When enabled, you will see the Resolution window prior to completing the Item. Use it to specify whether or not the Item resulted in change.



If you select "yes," you will report which Impact your work had. If you respond "no," you will give a reason why.

3. Submit the Resolution for Approval.

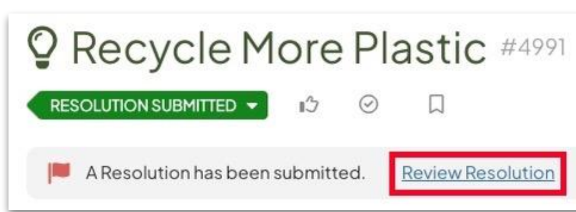
Depending on how permissions are configured, the Resolution might require the approval of someone else on the Team.



After selecting the Submit for Approval button, the Item will enter Resolution Submitted Status.

3. Approve the Resolution.

If you have permission to approve the Resolution, you will see a flag at the top of the Item. Select **Review Resolution** to review the Resolution and close out the Item.



4. Notify stakeholders.

After Resolution approval, the Item is Complete. At this time, you can choose whether you want to send additional notifications to stakeholders not on the Item Team.