Procurement Activity Steps & Action Items – User Guide

Version 1.0 · October 2026

Every procurement package in Horizon is made of **activity steps**: shop drawings, approvals, fabrication, delivery and so on. This release makes those steps quicker to set up and easier to follow through:

- **Days or dates.** Set each step as a number of days after the one before it, and Horizon works out the dates for you. You can still pick a date wherever that suits better.
- **An owner for every step.** Each step belongs to the package's Procurement Owner unless you hand it to someone else.
- **Action items from steps.** One click turns a step into a Delivery Action Item, assigned to the step's owner and due on the step's date. Your contracts administrator sees it in **Delivery → Action Items**, the owner gets the usual reminders, and the step shows the action item's live status.

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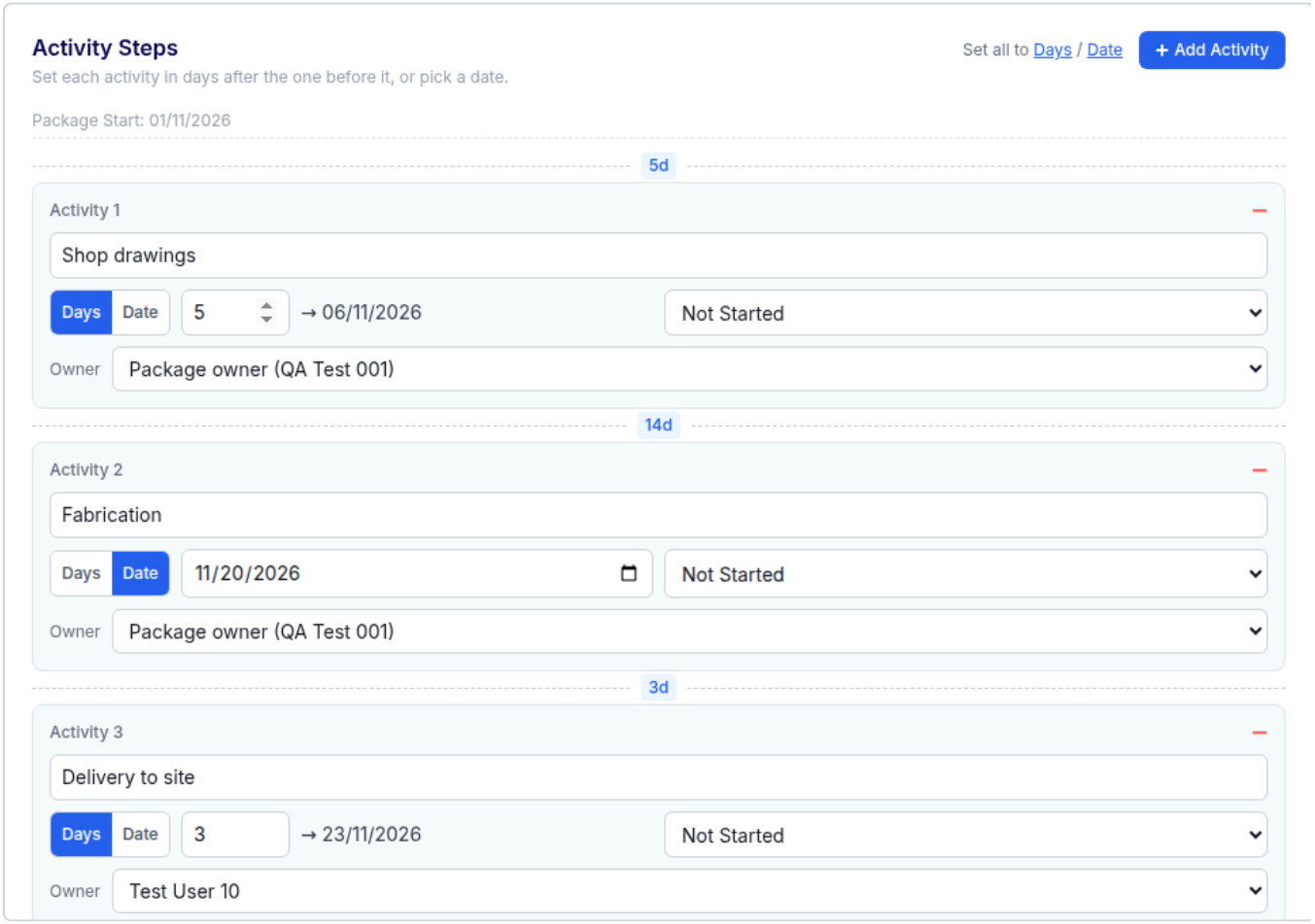
1. Where to find it

Open **Procurement → Procurement Schedule** and choose your project.

- **Editing steps** (days, dates and owners) happens in the package's **Edit** window, in the **Activity Steps** section. Open it with the edit button on a package row, or with **Edit** at the bottom of the package drawer.
- **Creating and following action items** happens in the package drawer. Click a package to open the drawer, then choose the **Progress** tab.

2. Setting up activity steps in days or dates

Each step has a **Days | Date** switch.



The Activity Steps section with steps set in days and by date

Days

Type how many days the step takes. Horizon counts from the step before it and shows the resulting date beside the box (→ 06/11/2026). The first step counts from the package's **Procurement Start Date**.

For example, with a Procurement Start Date of 1 November:

Step	Days	Date Horizon works out
Shop drawings	5	6 November
Fabrication	10	16 November
Delivery to site	3	19 November

New steps start in **Days**.

Date

Pick the date, as before. Use this for a step tied to a fixed date, such as a supplier's confirmed delivery. A step set by date stays put when other dates move, and any steps in days after it count on from it.

When dates move

The Procurement Start Date is your **Required On Site Date** minus the **Planned Lead Time**. Change either of those, or override the start date, and every step set in days moves with it. Steps set by date don't move.

The small badge between two steps (for example **5d**) always shows the days from one step to the next. It turns red if a date falls before the step above it.

Switching between Days and Date

Switching a step never moves it:

- **Days** → **Date** keeps the date it already had.
- **Date** → **Days** keeps the same gap from the step before, as a number of days.

To switch every step at once, use **Set all to Days / Date** at the top of the section.

"Nothing to count from"

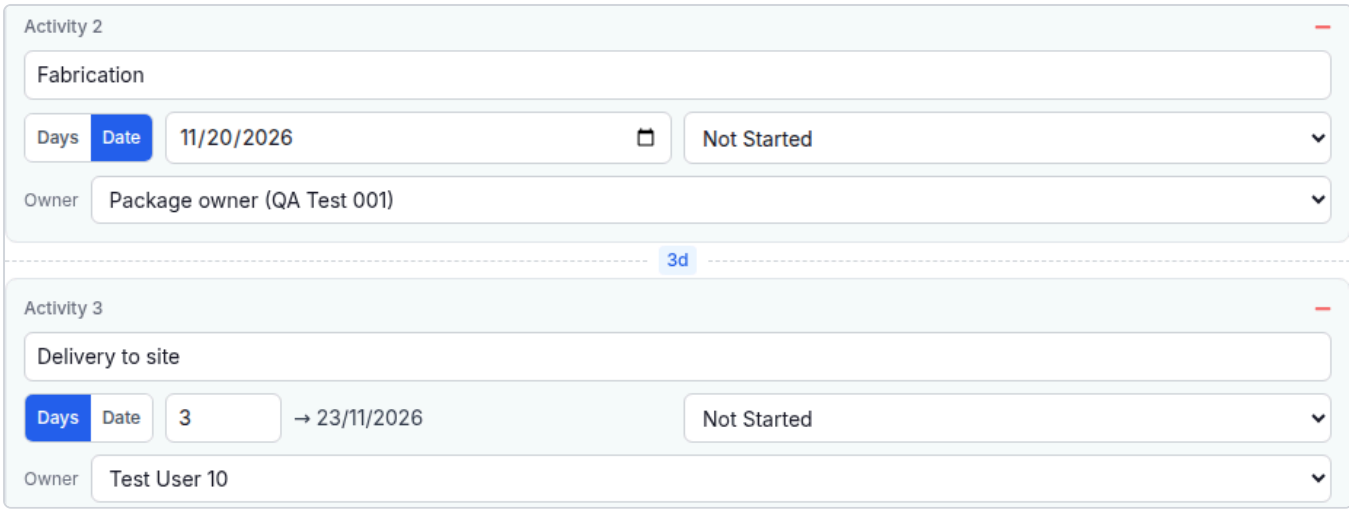
A step in days needs something to count from: a Procurement Start Date, or an earlier step with a date. If there's neither, the step shows *Nothing to count from* and the package can't be saved until you fix it. Fill in the Required On Site Date and Planned Lead Time, or give an earlier step a date.

Lead Time Summary

Under the steps, the **Lead Time Summary** compares how long your steps take with the Planned Lead Time, and shows whether the last step lands before or after the Required On Site Date.

3. Who owns each step

Each step has an **Owner** list.



One step following the package owner, and one handed to someone else

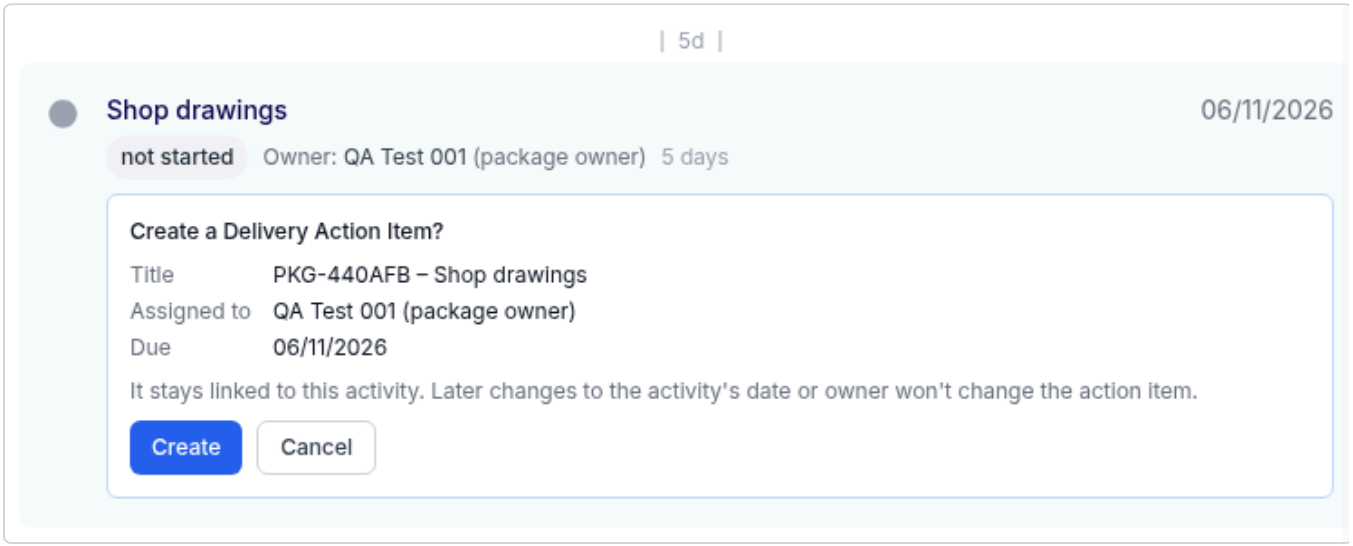
- **Package owner** (the first option, showing the current Procurement Owner's name) means the step belongs to whoever owns the package. If the package changes hands, these steps follow automatically.

- **Choosing a person** hands that step to them, whoever owns the package. Choose **Package owner** again to hand it back.

In the drawer's **Progress** tab, each step shows its owner. Steps that follow the package are marked *(package owner)*.

4. Creating an action item from a step

1. Open the package drawer and choose the **Progress** tab.
2. Next to the step, click **Create action item**.
3. Check the details Horizon shows, then click **Create**:
    - **Title:** the package number and step name, for example *PKG-2026-007 – Delivery to site*
    - **Assigned to:** the step's owner
    - **Due:** the step's date



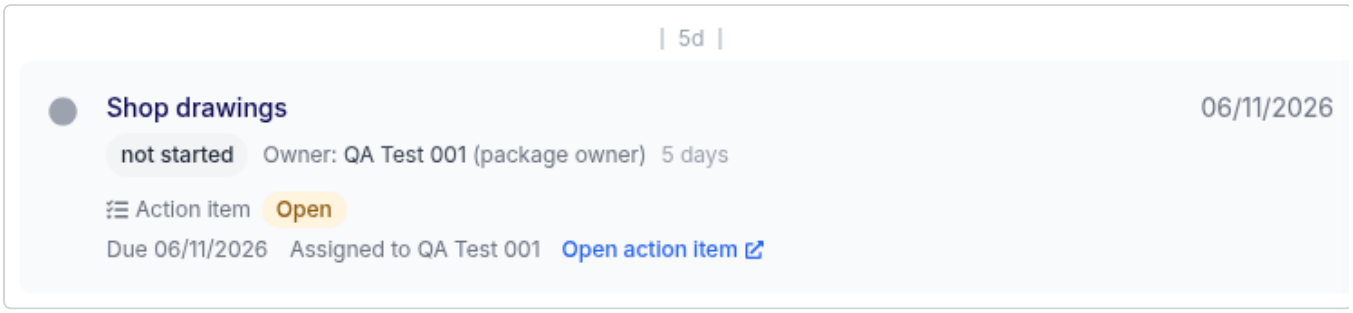
Confirming a new action item

Horizon creates a **Delivery Action Item** in the package's project, with category *Procurement* and the package as its source. The owner is notified in the usual way. If your workspace uses Action Item reminders, they are reminded before the due date and when it's overdue.

Create action item is only available when the step has an owner (its own or the package's) and a date, and the package has been saved. Each step can have **one** action item.

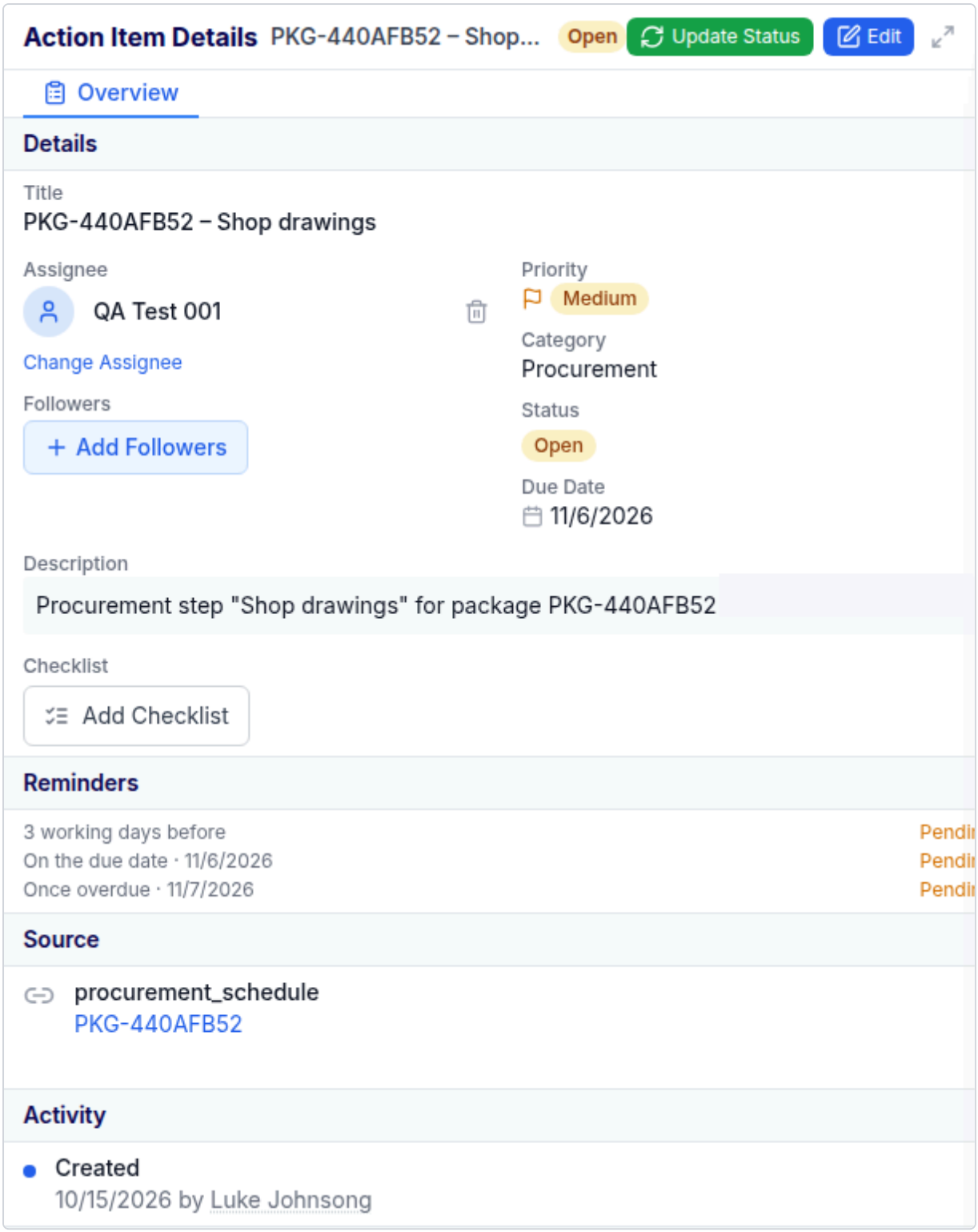
5. Following the action item

Once created, the step shows the action item:



A step with its linked action item

- **Status:** Open, In Progress, Completed or Cancelled, read fresh each time you open the package.
- **Due date** and **who it's assigned to**.
- **Open action item ↗:** opens it in **Delivery → Action Items**, with its details panel showing.



The action item in Delivery → Action Items

Work the action item as you would any other: update its status, add notes, close it. The procurement step shows the new status the next time you open the package.

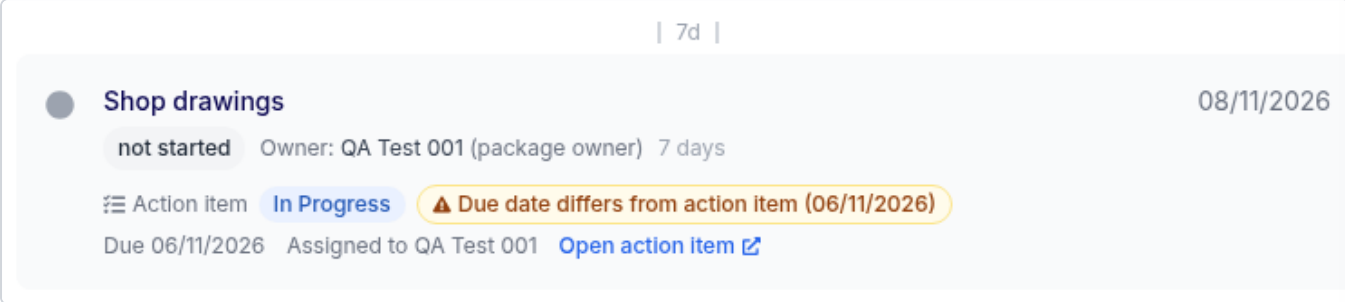
The Edit window shows the same status under each step, so you can see which steps already have an action item while you plan.

If an action item is **deleted** in Action Items, the step shows *Action item removed* and the **Create action item** button comes back.

6. When a step changes after its action item was created

Changing a step **does not change its action item**. Horizon never moves an action item's due date or reassigns it for you. Instead, the step shows an amber flag when the two no longer match:

- **Due date differs from action item (dd/mm/yyyy):** the step's date has moved (for example, because the start date moved and the step is set in days). The date in brackets is the action item's due date.
- **Assignee differs from action item:** the step's owner has changed.



A step whose date has moved since its action item was created

To bring them back in line, open the action item and update its due date or assignee there. Or, if the step no longer needs it, close or delete the action item and create a new one from the step.

7. Tips and troubleshooting

What you see	Why, and what to do
Create action item is greyed out	Hover over it for the reason. The step needs an owner (its own or the package's) and a date.
The owner isn't linked to a Deep Space user	The owner was typed in as a name, usually by an Excel import. Pick the owner from the list, save, then create the action item.
Nothing to count from	A step in days has no start date or earlier dated step to count from. See section 2.
This activity already has an action item	Each step can have one action item. Open the existing one with **Open action item ↗**.
You removed a step that had an action item	Horizon asks first. The action item stays in **Delivery → Action Items**; close or delete it there if it's no longer needed.
Procurement Start Dates are one day later than before	Start dates are now exactly the Required On Site Date minus the Planned Lead Time. Some packages previously showed a day earlier; they update the next time the package is saved.

8. Quick reference

I want to…	Where	How
Plan steps by duration	Edit window → Activity Steps	**Days**, then type the number of days
Fix a step to a date	Edit window → Activity Steps	**Date**, then pick the date
Switch every step at once	Edit window → Activity Steps	**Set all to Days / Date**
Give a step to someone else	Edit window → step **Owner**	Choose the person
Hand a step back to the package owner	Edit window → step **Owner**	Choose **Package owner**
Create an action item for a step	Drawer → **Progress**	**Create action item**, then **Create**
Open a step's action item	Drawer → **Progress**	**Open action item ↗**
See whether a step and its action item still match	Drawer → **Progress**, or the Edit window	Look for the amber flags