



Action Items

Agency/Higher-Ed

Purpose & Procedure

- ▶ Action Items give the user the ability to create a record that can be routed to one or several users for action
- ▶ May result from project meetings and are assigned to a specific individual or group
- ▶ Provides all project users the ability to view the status of Action Items in Logs
- ▶ Can be delegated to another group or individual for response
- ▶ Best used when no other BP is acceptable for the work that needs to be completed

- ▶ Workflow
Created by: **Any User** → Submitted to: **Any User for Response** → Sent to: **Creator for Review**

Examples of Action Items

- ▶ Architects
 - ▶ ASI Information
 - ▶ Bulletins
- ▶ OFCC PMs
 - ▶ Commissioning Agent Reports

Creating an Action Item

- ▶ Navigate to:
 - ▶ Logs -> Action Item
 - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier (Development)'. Below this, there are tabs for 'Agency' and 'OAKS CI Trainin...'. The left sidebar contains a navigation menu with various options, including 'Logs', which is circled in red. A red arrow points from the 'Click Create' instruction in the text to the 'Logs' option. The main content area displays the 'Action Items' list, with a '+ Create' button circled in red. The list contains several entries with columns for 'Record No' and 'Title'.

Record No	Title
AI-00165	Test Action
AI-00164	test 1
AI-00163	test 1
AI-00162	Chris Hare
AI-00161	Carol Amis
AI-00160	Winnie Agt
AI-00159	Katie Marie
AI-00158	Ben Posey
AI-00157	katie
AI-00156	DAVE BILL
AI-00155	Emily Rine
AI-00154	Katie Tuttle
AI-00153	STUDENT
AI-00152	Student 2
AI-00151	Student 6
AI-00150	Student 7

Total: 165

Add Information to the Record

- ▶ Fill out all required information in the General Tab
 - ▶ Required information is marked with a red *
- ▶ Attach any necessary documentation

The screenshot shows a web browser window titled "Action Items - Test Action Item - Project No. OCI-090004 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=uai&fromSource=text&fromModelId=1010&module_name=ua. The browser menu includes File, Edit, View, Actions, and Help. The "Workflow Actions" menu is open, showing options: Send, Save, Spelling..., Undo Accept Tas, Add Attachment (circled in red), and Close Window.

The main content area is titled "Action Items" and has a "General" tab selected. The "General" section contains the following fields:

Organization:	Department of Administrative Services	Record Number:	
Project Number:	OCI-090004	Creator:	Katie Tuttle
Project Name:	OAKS CI Training 4	Creation Date:	
Project Location:	4200 Surface Road	Status:	
Title:	Test Action Item *	Priority:	Medium
Assignee:		Due Date:	07/05/2017 10:48 AM (UTC-8) *
Meeting Minute:	Select...		

The "Action" section contains a text area for "Action Requested:" with the text: "Please review the document and add any comments as necessary".

At the bottom, there are tabs for "Action Details" and "Collaboration", and links for "Linked Records (0)" and "Linked Mail (0)".

Send the Record

- ▶ Verify Workflow Action
- ▶ Click the “To” box to select recipient(s)
- ▶ Click Send

The screenshot shows a web browser window titled "Create New Action Items - Project No. OCI-090004 - Google Chrome". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=807&module_name=uai&project_id=1021. The browser menu bar includes File, Edit, View, Actions, and Help. The application toolbar contains buttons for Workflow Actions, Send, Save, Spelling, Undo, Accept Task, Add Attachment, and Close Window. The main content area is titled "Action Items" and includes a "General" section with fields for Organization (Department of Administrative Services), Project Number (OCI-090004), Project Name (OAKS CI Training 4), and Project Location (4200 Surface Road). Below this is the "Action Details" section, which includes a "Send" sub-section with a "To..." field containing the text "Bill Schwertfager,Oaks Instructor,Rita Nichols," and a "Cc..." field. A "Send For:" field is set to "Response". A "Collaboration" section is also visible. A "User/Group Picker" window is open over the "To..." field, displaying a list of users and groups from the "OAKS CI Training 4" project. The list includes names like Archana Atrey, Barbara Taylor, Bill Schwertfager, Katie Tuttle, Moenique Morris, Oaks Instructor, Purna Irukulapati, Rita Nichols, Shauna Hooks, and Steve Mavo, all associated with the "State of Ohio" company. The window also shows "36 Item(s)", "Page 1 of 1", and "Display 100 Items Per Page". At the bottom of the picker window are buttons for "Add", "View Profile", and "Members", and a "Selected Users/Groups" section.

Workflow Actions | Send | Save | Spelling.. | Undo | Accept Task | Add Attachment | Close Window

Action Items

General

Organization: Department of Administrative Services
Project Number: OCI-090004
Project Name: OAKS CI Training 4
Project Location: 4200 Surface Road

Action Details

Send

To... Bill Schwertfager,Oaks Instructor,Rita Nichols,
Cc...
Send For: Response

Collaboration

Attachments (3)
Linked Records (0)
Linked Mail (0)

User/Group Picker - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/share/project/picker_user

Find

from: OAKS CI Training 4 | Show By: Users/Groups

Users/Groups - Current View: All

36 Item(s) | Page 1 of 1 | Display 100 Items Per Page

Name	Company
All Project Users	
Archana Atrey	State of Ohio
Barbara Taylor	State of Ohio
Bill Schwertfager	State of Ohio
Katie Tuttle	State of Ohio
Moenique Morris	State of Ohio
Oaks Instructor	State of Ohio
Purna Irukulapati	State of Ohio
Rita Nichols	State of Ohio
Shauna Hooks	State of Ohio
Steve Mavo	State of Ohio

Add | View Profile | Members

Selected Users/Groups

Name

Reviewing and Responding

- ▶ Review Task Details Area
 - ▶ Note who sent Task
 - ▶ Review Response List

The screenshot displays a web browser window titled "Action Items - Action Item Test - Project No. OCI-080001 - Google Chrome". The URL is https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=916386&parent_id=0&viewOnly=0&project_id=1. The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with buttons for "Accept Task", "Decline Task", and "Close Window".

The main content area is divided into sections:

- Action Items**: A tabbed interface with a "General" section containing fields for Organization (Department of Administrative Service), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Record Number (AI-00017), Creator (Katie Tuttle), and Creation Date (09/24/2015 07:27 AM (UTC-8)).
- Task Details**: A section with fields for From (Katie Tuttle), To (Katie Tuttle), Cc, Sent For (Delegate Response), Task Due Date, Task Status (Not Started), and Task Notes (0).
- Response List**: A table with columns for Items #, Published Date, Published By, and Company. It contains one entry: Action Description - 1, Published Date 09/24/2015 07:27 AM, Published By Katie Tuttle, and Company soo. Below the table are fields for Text Comments (Please review the attached document) and Attachments (None).

At the bottom of the page, there are links for "Linked Records (0)" and "Linked Mail (0)".

Reviewing and Responding

- ▶ Enter Collaboration notes
- ▶ Select Workflow Action
- ▶ Click Send

The screenshot shows a web browser window with the following details:

- Browser Title:** Action Items - Katie Marie - Project No. OCI-090004 - Mozilla Firefox
- URL:** https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=188946&model=uai&project_id=1021&initiateBP=&bulkautoaccept=&fromRefLog=&_ur
- Menu:** File Edit View Actions Help
- Toolbar:** Send, Save, Spelling, Undo Accept Task, Add Attachment, Review, Close Window
- Workflow Actions:** Completed Send (dropdown), Send
- Action Items:** Completed Send For Review (highlighted), Delegate, Send For Assistance
- General:** Organization: Department of Administrative Services, Project Number: OCI-090004, Project Name: OAKS CI Training 4, Project Location: 4200 Surface Road, Record Number: AI-00159, Creator: Katie Tuttle, Creation Date: 04/12/2017 10:59 AM (UTC-8)
- Action Details:** Completed Send For Review (Click here to view latest content), To: Katie Tuttle, Cc: [empty], Send For: Review
- Task Notes:** [empty]
- Workflow Progress:** [empty]
- Collaboration:** Please pay attention to page 4 section 1
- Attachments:** (0)
- Linked Records:** (0)
- Linked Mail:** (0)

Completing Action Item

- ▶ Review Response List for information about the record
- ▶ Click “Accept Task”

The screenshot shows the Oracle Action Items web application interface. The browser window title is "Action Items - Katie Marie - Project No. OCI-090004 - Mozilla Firefox". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=188947&model=uai&project_id=1021&fromRefLog=&_uref=L. The navigation bar includes "File", "Edit", "View", "Actions", and "Help". The "Accept Task" button is circled in red. Below the navigation bar, the "Action Items" section is visible. The "General" tab shows the following information:

- Organization: Department of Administrative Services
- Record Number: AI-00159
- Project Number: OCI-090004
- Creator: Katie Tuttle
- Project Name: OAKS CI Training 4
- Creation Date: 04/12/2017 10:59 AM (UTC-8)
- Project Location: 4200 Surface Road

The "Task Details" section shows:

- From: Katie Tuttle
- To: Katie Tuttle
- Cc:
- Sent For: Review
- Task Due Date:
- Task Status: Not Started
- Task Notes (0)
- Workflow Progress

The "Response List" section contains a table with the following data:

Items #	Published Date	Published By	Company
Resolution - 3	06/30/2017 09:45 AM	Katie Tuttle	soo
Text Comments: Please pay attention to page 4 section 1			
Attachments: None			
Resolution - 2	06/30/2017 09:43 AM	Katie Tuttle	soo
Text Comments: Please pay attention to page 4 section 1			
Attachments: None			
Action Description - 1	04/12/2017 11:04 AM	Katie Tuttle	soo
Text Comments: Please pay careful attention to the bottom part of the document.			
Attachments: None			

At the bottom of the page, there are links for "Linked Records (0)" and "Linked Mail (0)".

Completing Action Item

- ▶ If all necessary work on this record has been completed select Workflow Action: Close
- ▶ Click Send

Organization: Department of Administrative Services
Project Number: OCI-090004
Project Name: OAKS CI Training 4
Project Location: 4200 Surface Road

Record Number: AI-00159
Creator: Katie Tuttle
Creation Date: 04/12/2017 10:59 AM (UTC-8)

Close (Click here to view latest content)

To...
Cc...

Send For: End

Task Notes:
Workflow Progress

Attachments (0)
Linked Records (0)
Linked Mail (0)

Questions?

Please contact OAKS CI Support Desk:

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