OAKS
Capital Improvements

Action Items

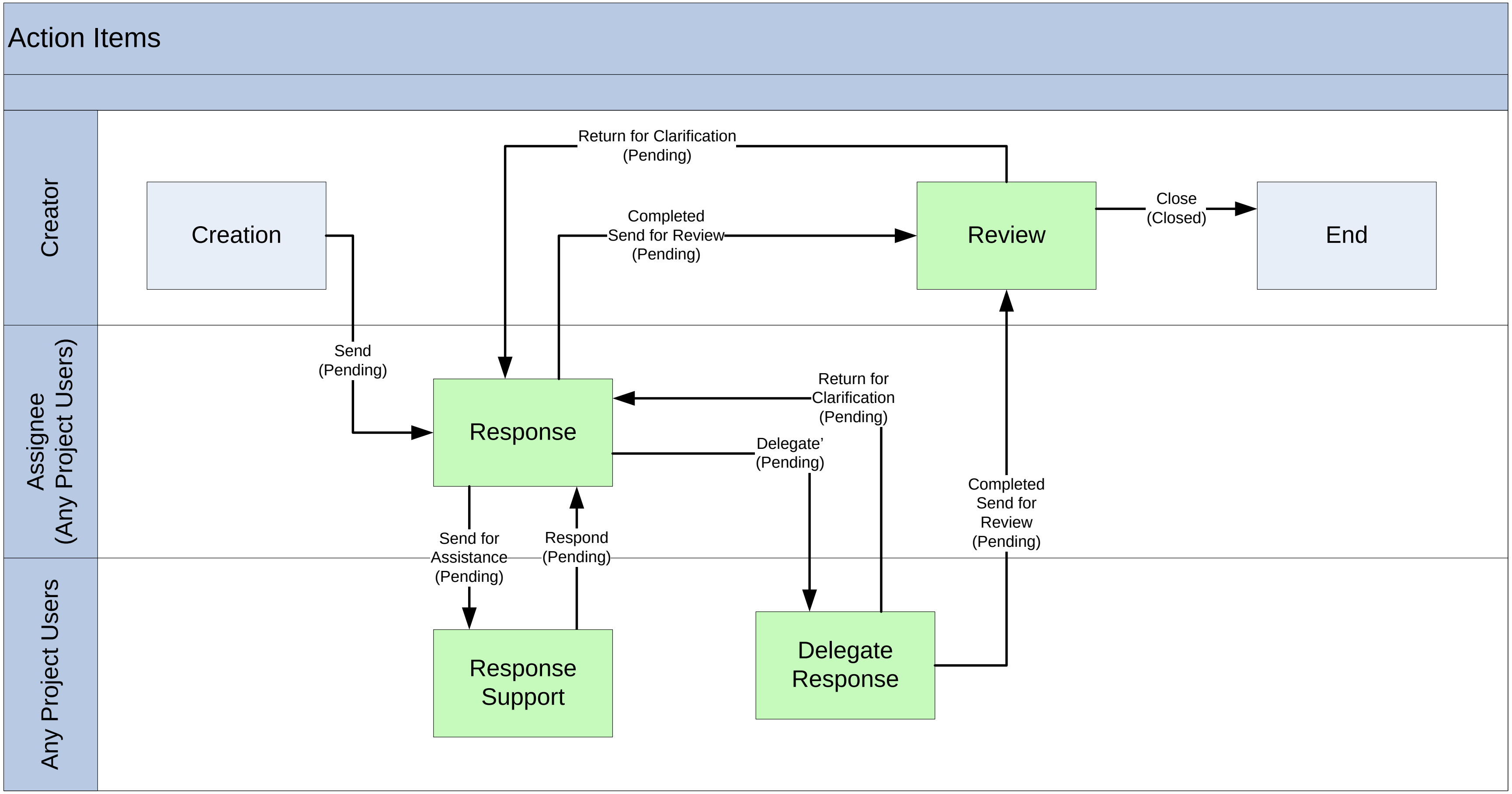
Agency/Higher-Ed

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

Purpose

- 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

Workflow



Action Items

Creator

Creation

Return for Clarification
(Pending)

Completed
Send for Review
(Pending)

Review

Close
(Closed)

End

Assignee
(Any Project Users)

Send
(Pending)

Response

Return for
Clarification
(Pending)

Delegate'
(Pending)

Completed
Send for
Review
(Pending)

Send for
Assistance
(Pending)

Respond
(Pending)

Any Project Users

Response
Support

Delegate
Response

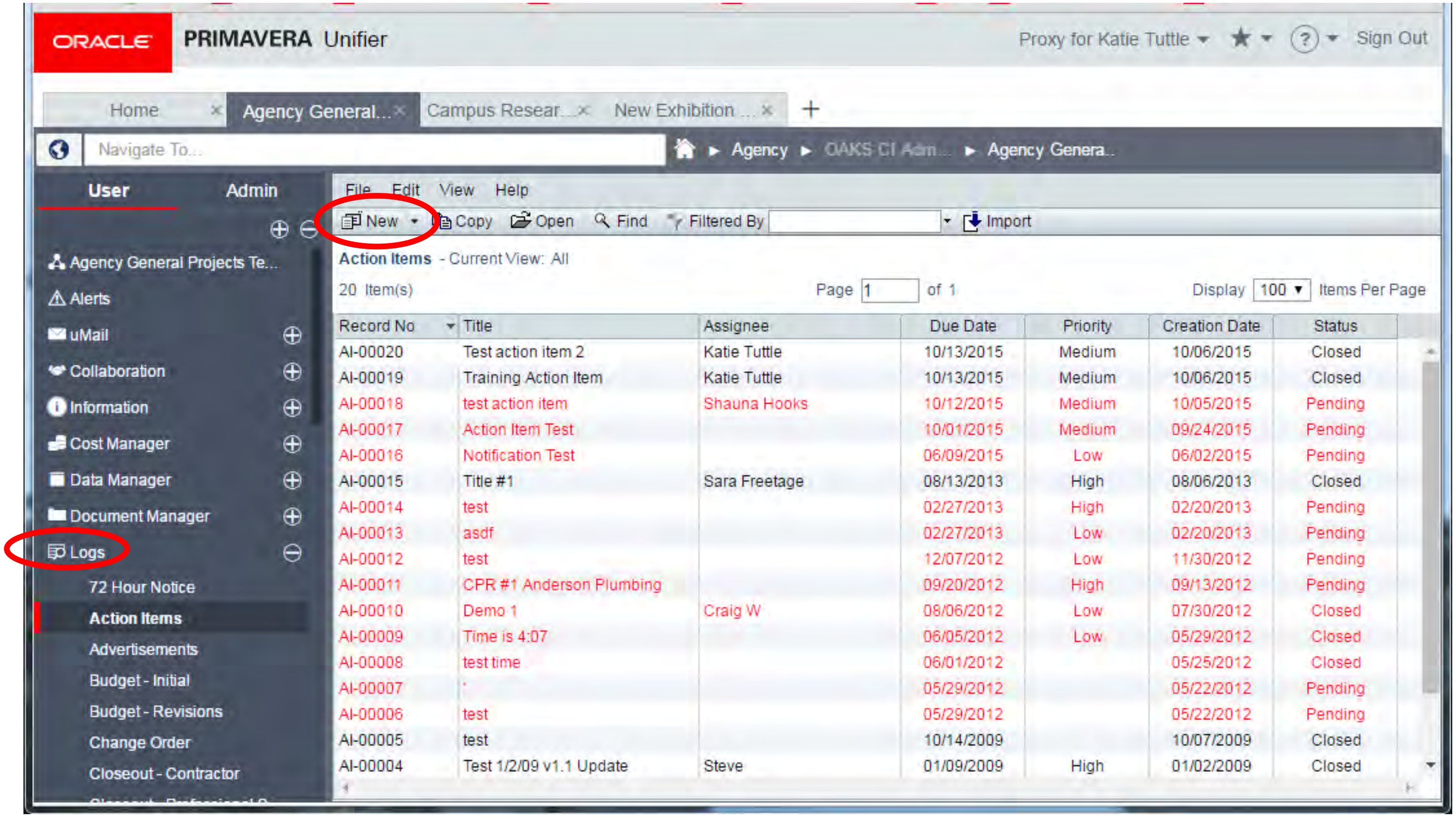
Examples of Action Items

- Architects
  - ASI Information
  - Bulletins

- OFCC PMs
  - Commissioning Agent Reports

Creating an Action Item

- Navigate to:
  - Logs -> Action Item
  - Click New



ORACLE
PRIMAVERA Unifier
Proxy for Katie Tuttle
Sign Out
Home
Agency General...
Campus Resear...
New Exhibition ...
Navigate To...
Agency
OAKS CI Adm...
Agency Genera...
User
Admin
Agency General Projects Te...
Alerts
uMail
Collaboration
Information
Cost Manager
Data Manager
Document Manager
Logs
72 Hour Notice
Action Items
Advertisements
Budget - Initial
Budget - Revisions
Change Order
Closeout - Contractor
File
Edit
View
Help
New
Copy
Open
Find
Filtered By
Import

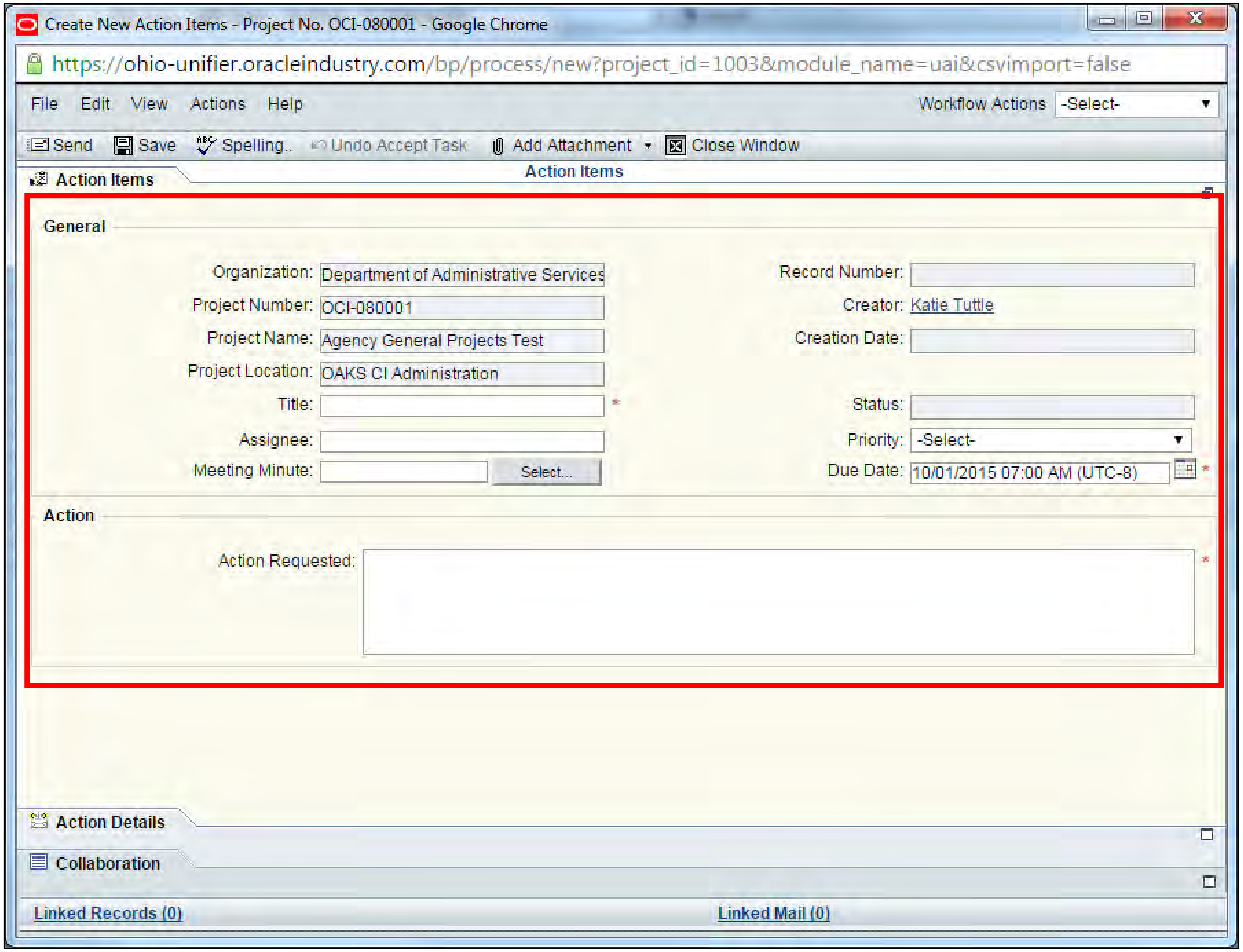
Action Items - Current View: All

20 Item(s) Page 1 of 1 Display 100 Items Per Page

Record No	Title	Assignee	Due Date	Priority	Creation Date	Status
AI-00020	Test action item 2	Katie Tuttle	10/13/2015	Medium	10/06/2015	Closed
AI-00019	Training Action Item	Katie Tuttle	10/13/2015	Medium	10/06/2015	Closed
AI-00018	test action item	Shauna Hooks	10/12/2015	Medium	10/05/2015	Pending
AI-00017	Action Item Test		10/01/2015	Medium	09/24/2015	Pending
AI-00016	Notification Test		06/09/2015	Low	06/02/2015	Pending
AI-00015	Title #1	Sara Freetage	08/13/2013	High	08/06/2013	Closed
AI-00014	test		02/27/2013	High	02/20/2013	Pending
AI-00013	asdf		02/27/2013	Low	02/20/2013	Pending
AI-00012	test		12/07/2012	Low	11/30/2012	Pending
AI-00011	CPR #1 Anderson Plumbing		09/20/2012	High	09/13/2012	Pending
AI-00010	Demo 1	Craig W	08/06/2012	Low	07/30/2012	Closed
AI-00009	Time is 4:07		06/05/2012	Low	05/29/2012	Closed
AI-00008	test time		06/01/2012		05/25/2012	Closed
AI-00007	'		05/29/2012		05/22/2012	Pending
AI-00006	test		05/29/2012		05/22/2012	Pending
AI-00005	test		10/14/2009		10/07/2009	Closed
AI-00004	Test 1/2/09 v1.1 Update	Steve	01/09/2009	High	01/02/2009	Closed

Creating an Action Item

- Complete the upper form (General)



Create New Action Items - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=uai&csvimport=false

General

Organization: Department of Administrative Services
Project Number: OCI-080001
Project Name: Agency General Projects Test
Project Location: OAKS CI Administration
Title: *
Assignee:
Meeting Minute:
Record Number:
Creator: Katie Tuttle
Creation Date:
Status:
Priority: -Select-
Due Date: 10/01/2015 07:00 AM (UTC-8) *

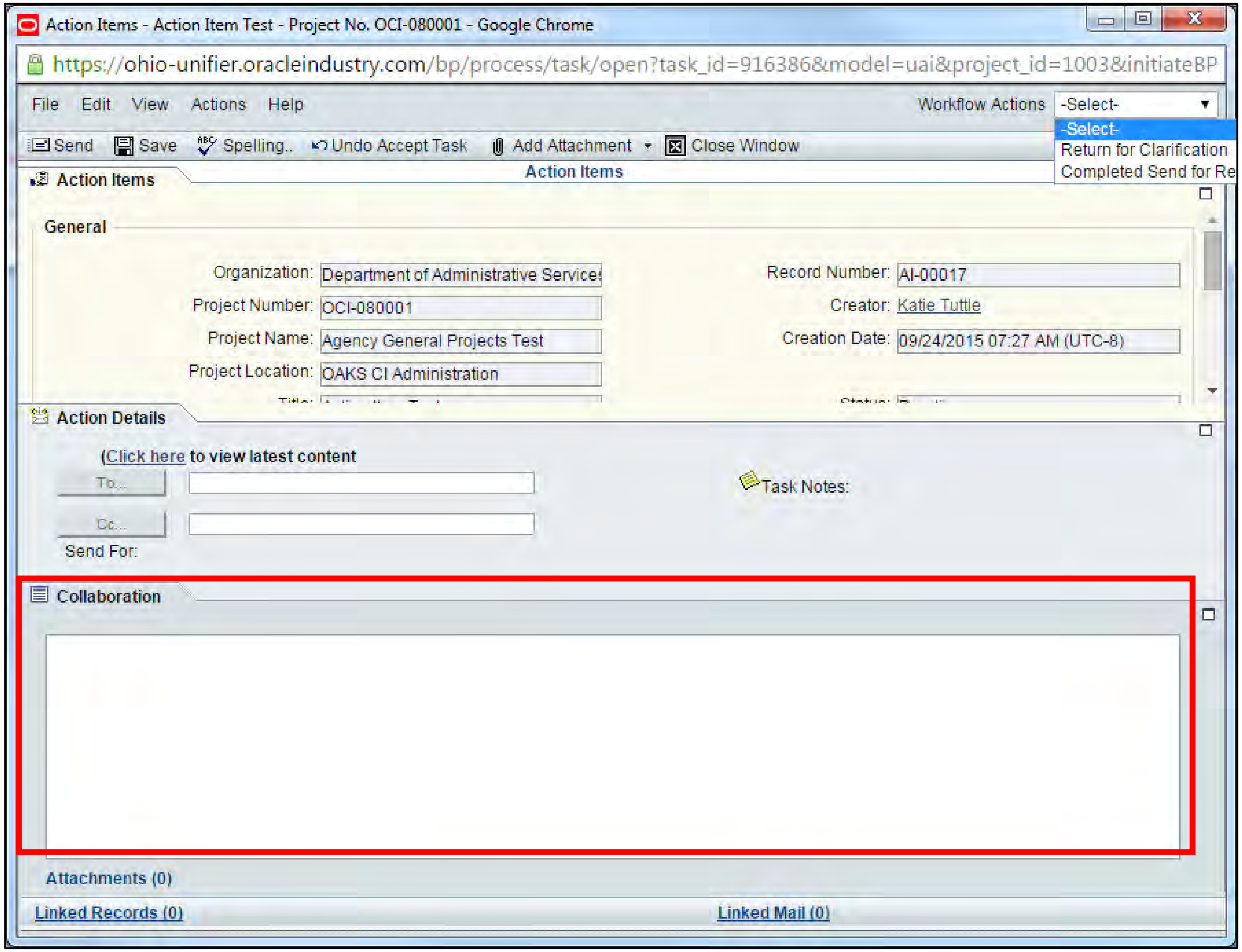
Action

Action Requested: *

File
Edit
View
Actions
Help
Workflow Actions
-Select-
Send
Save
Spelling..
Undo Accept Task
Add Attachment
Close Window
Action Items
Action Items
Select...
Action Details
Collaboration
Linked Records (0)
Linked Mail (0)

Creating an Action Item

- Plug in any additional information in Collaboration



Action Items - Action Item Test - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=916386&model=uai&project_id=1003&initiateBP

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

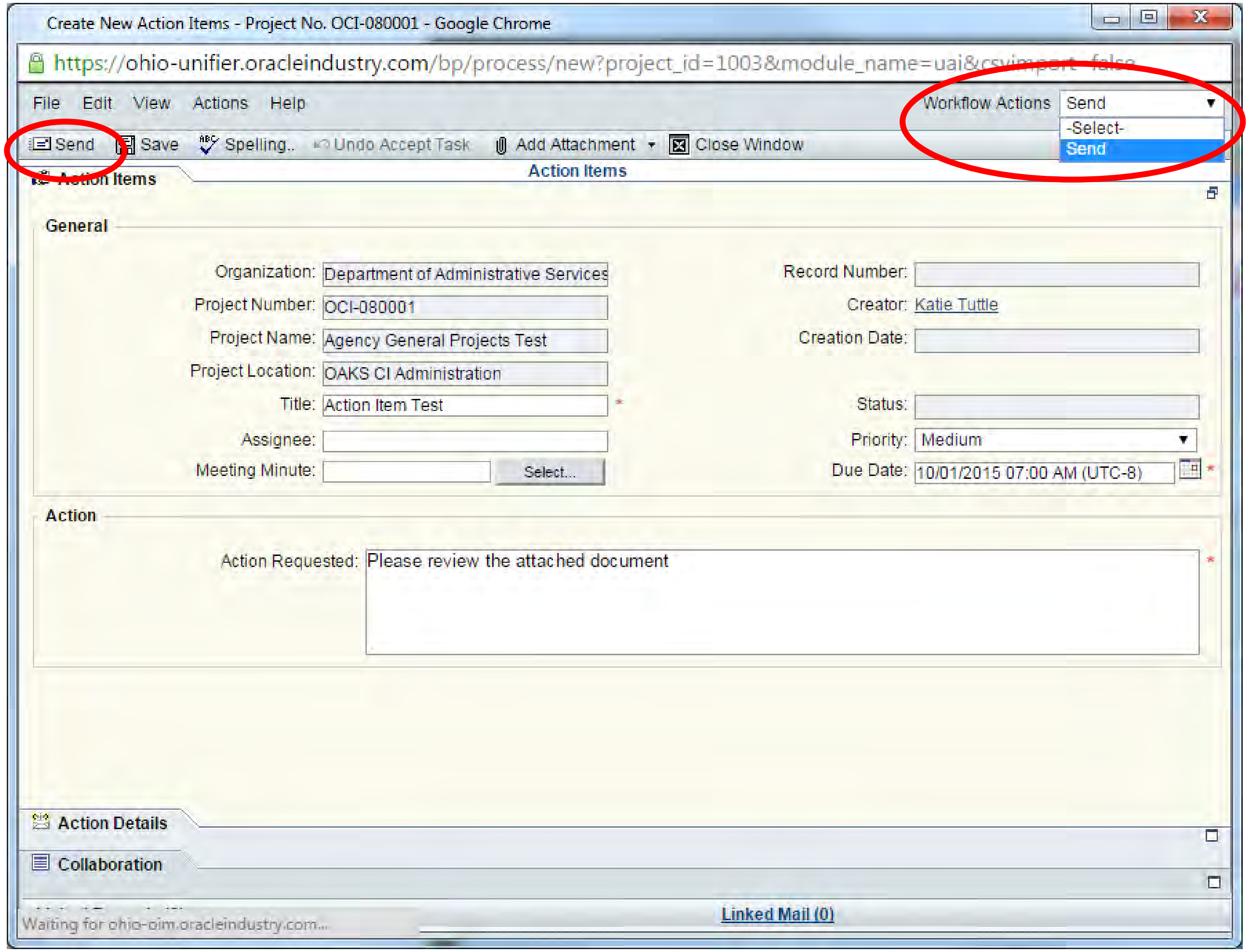
Creation Date: 09/24/2015 07:27 AM (UTC-8)

(Click here to view latest content

File
Edit
View
Actions
Help
Workflow Actions
-Select-
-Select-
Return for Clarification
Completed Send for Re
Send
Save
Spelling..
Undo Accept Task
Add Attachment
Close Window
Action Items
Action Items
General
Action Details
To...
Cc...
Send For:
Task Notes:
Collaboration
Attachments (0)
Linked Records (0)
Linked Mail (0)

Sending an Action Item

- Choose the Workflow Action: Send
- Click Send


Create New Action Items - Project No. OCI-080001 - Google Chrome
https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=uai&csvimport=false
File
Edit
View
Actions
Help
Send
Save
Spelling..
Undo Accept Task
Add Attachment
Close Window
Action Items
Action Items
General
Action
Select...
Action Details
Collaboration
Linked Mail (0)
Waiting for ohio-oim.oracleindustry.com...

Workflow Actions: Send
-Select-
Send

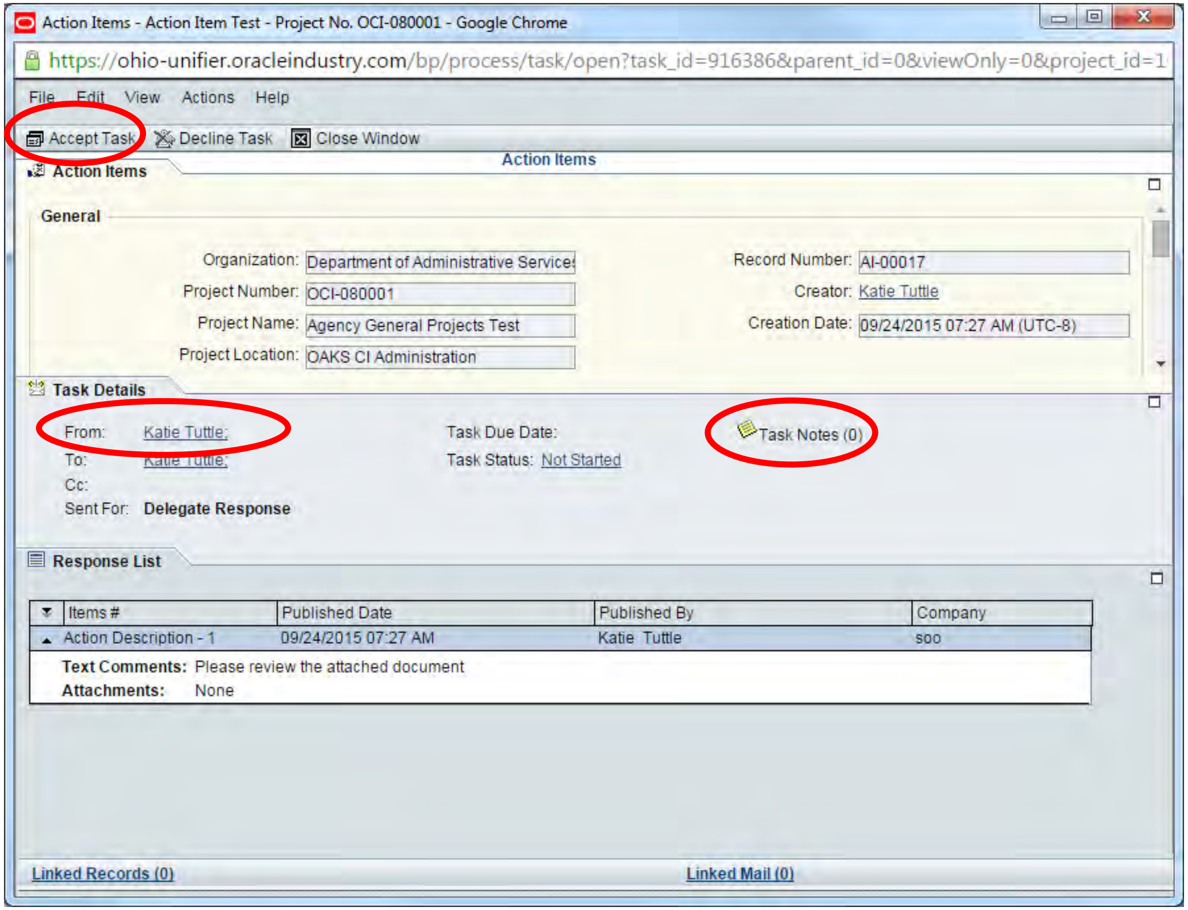
Organization: Department of Administrative Services
Project Number: OCI-080001
Project Name: Agency General Projects Test
Project Location: OAKS CI Administration
Title: Action Item Test *
Assignee:
Meeting Minute:

Record Number:
Creator: Katie Tuttle
Creation Date:
Status:
Priority: Medium
Due Date: 10/01/2015 07:00 AM (UTC-8) *

Action Requested: Please review the attached document *

Reviewing and Responding

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



Action Items - Action Item Test - Project No. OCI-080001 - Google Chrome
https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=916386&parent_id=0&viewOnly=0&project_id=1
File
Edit
View
Actions
Help
Accept Task
Decline Task
Close Window
Action Items
Action Items

General

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
Creation Date: 09/24/2015 07:27 AM (UTC-8)

Task Details

From: Katie Tuttle;
To: Katie Tuttle;
Cc:
Sent For: **Delegate Response**
Task Due Date:
Task Status: Not Started
Task Notes (0)

Response List

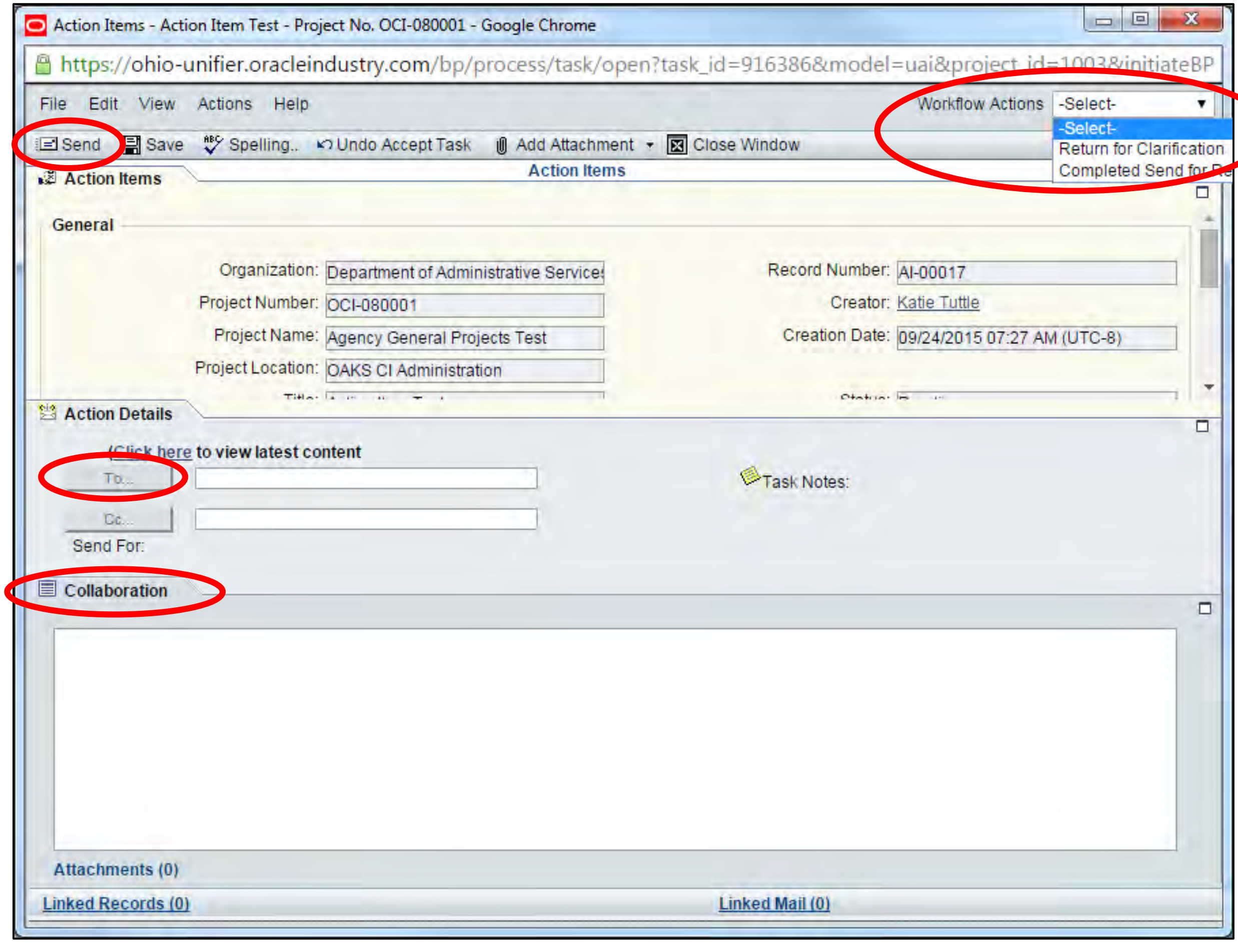
Items #	Published Date	Published By	Company
Action Description - 1	09/24/2015 07:27 AM	Katie Tuttle	soo

Text Comments: Please review the attached document
Attachments: None

Linked Records (0)
Linked Mail (0)

Reviewing and Responding

- Enter Collaboration notes
- Select Workflow Action
- Click “To” and select desired user to receive record
- Click Send



Action Items - Action Item Test - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=916386&model=uai&project_id=1003&initiateBP

File
Edit
View
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Workflow Actions
-Select-
-Select-
Return for Clarification
Completed Send for
Send
Save
Spelling..
Undo Accept Task
Add Attachment
Close Window
Action Items
Action Items
General
Action Details
To...
Cc...
Collaboration
Attachments (0)
Linked Records (0)
Linked Mail (0)

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

Creation Date: 09/24/2015 07:27 AM (UTC-8)

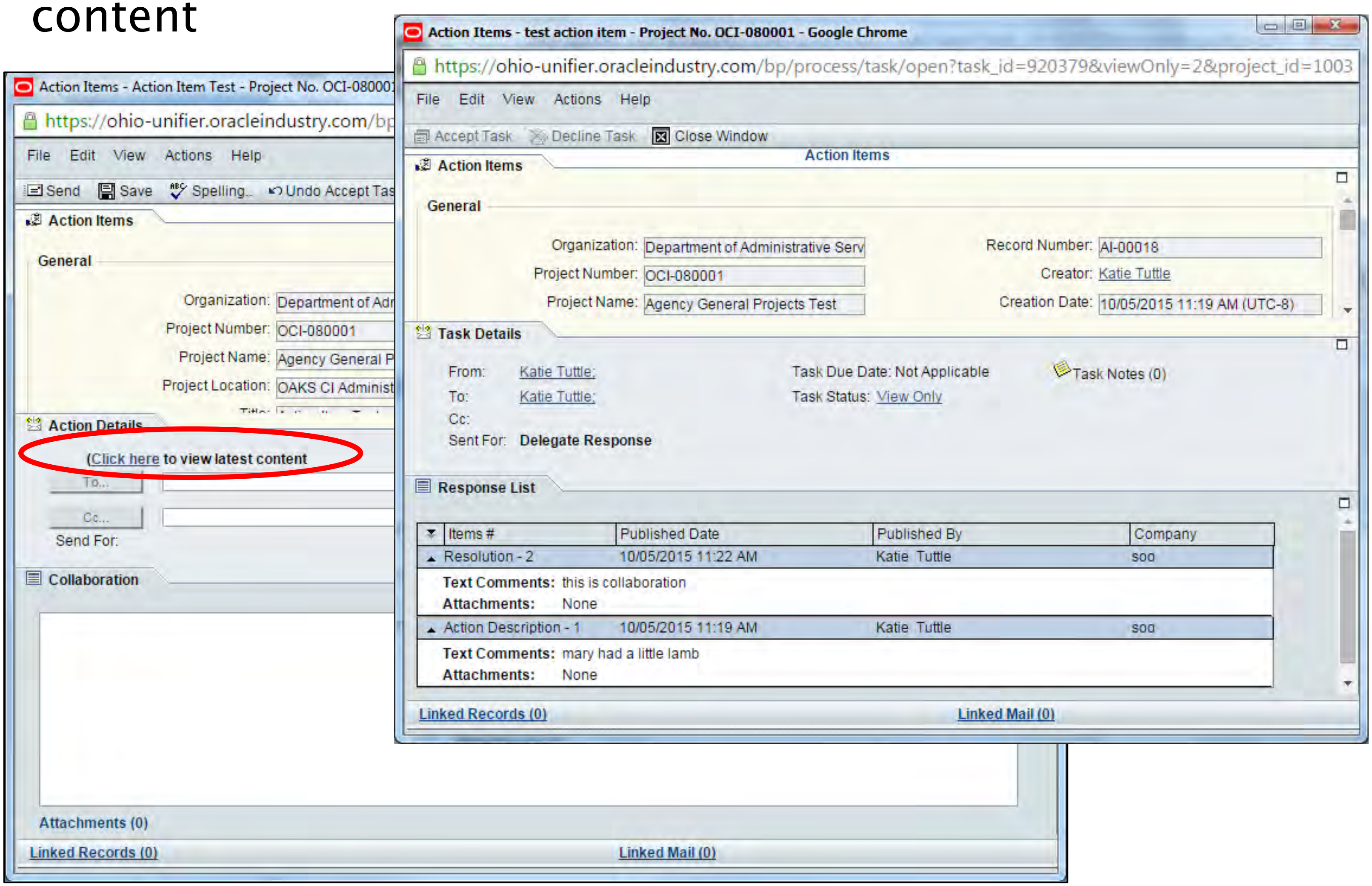
(Click here to view latest content

Send For:

Task Notes:

Action Details

- In Action Details click “Click Here” to view the latest content



Action Items - Action Item Test - Project No. OCI-08000

https://ohio-unifier.oracleindustry.com/bp

File Edit View Actions Help
Send Save Spelling.. Undo Accept Tas

Action Items

General

Organization: Department of Adr
Project Number: OCI-080001
Project Name: Agency General P
Project Location: OAKS CI Administ

Action Details

(Click here to view latest content

Send For:

Collaboration

Attachments (0)

Linked Records (0) Linked Mail (0)

Action Items - test action item - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=920379&viewOnly=2&project_id=1003

File Edit View Actions Help
Accept Task Decline Task Close Window

Action Items

Action Items

General

Organization: Department of Administrative Serv
Project Number: OCI-080001
Project Name: Agency General Projects Test
Record Number: AI-00018
Creator: Katie Tuttle
Creation Date: 10/05/2015 11:19 AM (UTC-8)

Task Details

From: Katie Tuttle;
To: Katie Tuttle;
Cc:
Sent For: **Delegate Response**
Task Due Date: Not Applicable
Task Status: View Only
Task Notes (0)

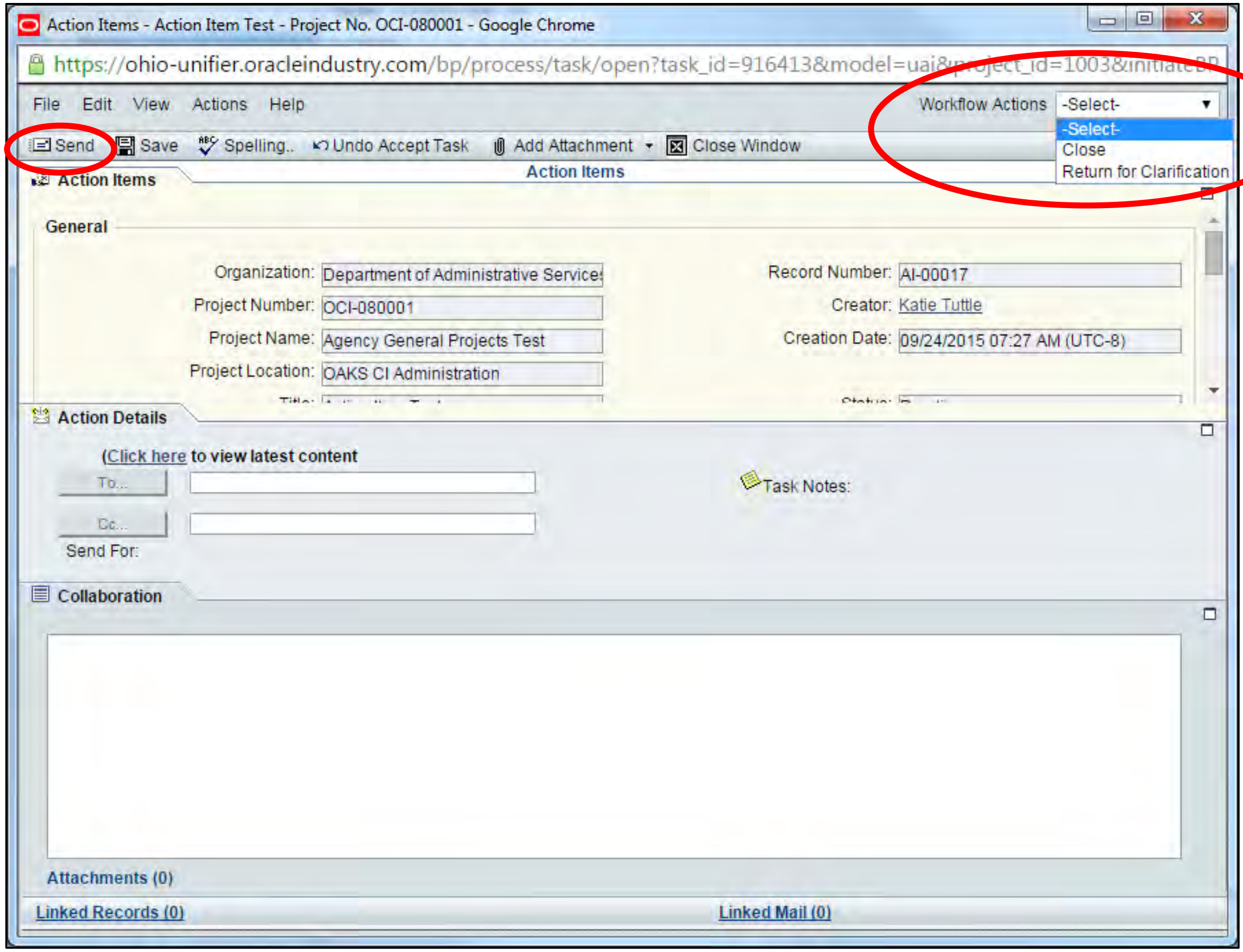
Response List

Items #	Published Date	Published By	Company
Resolution - 2	10/05/2015 11:22 AM	Katie Tuttle	soo
Text Comments: this is collaboration **Attachments:** None			
Action Description - 1	10/05/2015 11:19 AM	Katie Tuttle	soo
Text Comments: mary had a little lamb **Attachments:** None			

Linked Records (0) Linked Mail (0)

Completing Action Item

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



Action Items - Action Item Test - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=916413&model=uai&project_id=1003&initiateBP

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

Creation Date: 09/24/2015 07:27 AM (UTC-8)

(Click here to view latest content

File
Edit
View
Actions
Help
Workflow Actions
-Select-
-Select-
Close
Return for Clarification
Send
Save
Spelling..
Undo Accept Task
Add Attachment
Close Window
Action Items
Action Items
General
Action Details
To...
Cc...
Send For:
Task Notes:
Collaboration
Attachments (0)
Linked Records (0)
Linked Mail (0)

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211