



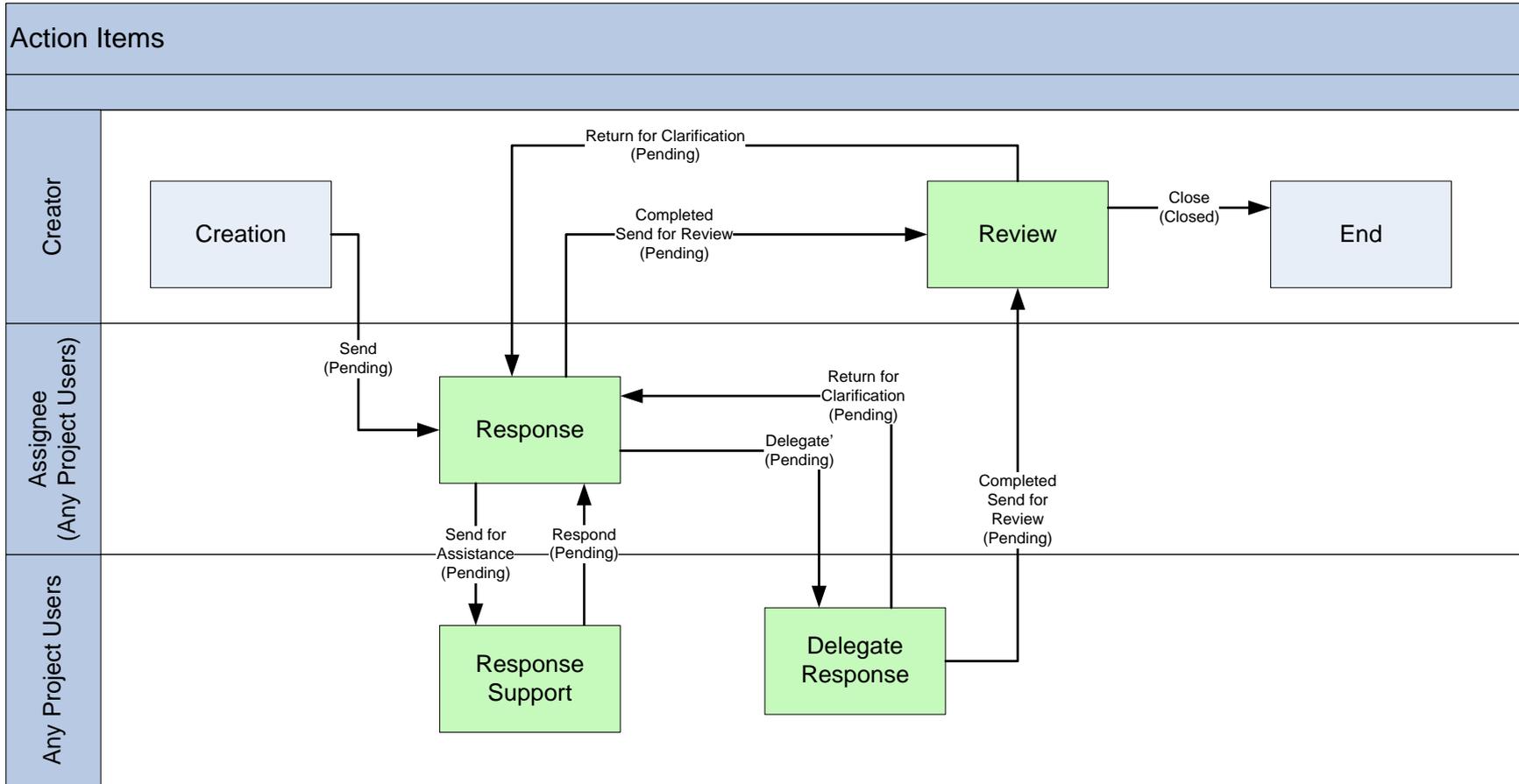
Action Items

Agency/Higher-Ed

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



Examples of Action Items

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

Creating an Action Item

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

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Proxy for Katie Tuttle'. The browser tabs show 'Agency General...', 'Campus Resear...', and 'New Exhibition...'. The main interface features a left-hand navigation menu with categories like 'Agency General Projects Te...', 'Alerts', 'uMail', 'Collaboration', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', and 'Logs'. The 'Logs' category is expanded, and the 'Action Items' sub-item is selected. In the top toolbar, the 'New' button is circled in red. Below the toolbar, a table titled 'Action Items - Current View: All' is displayed, showing 20 items. The table has columns for Record No, Title, Assignee, Due Date, Priority, Creation Date, and Status. The table data is as follows:

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)

The screenshot shows a web browser window titled "Create New Action Items - Project No. OCI-080001 - Google Chrome". The address bar shows the URL: https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=uai&csvimport=false. The browser menu includes File, Edit, View, Actions, and Help. The main content area is titled "Action Items" and contains a "General" section (highlighted with a red border) and an "Action" section. The "General" section includes the following fields:

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

The "Action" section contains a text area labeled "Action Requested:".

At the bottom of the page, there are sections for "Action Details", "Collaboration", "Linked Records (0)", and "Linked Mail (0)".

Creating an Action Item

- ▶ Plug in any additional information in Collaboration

The screenshot shows 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&model=uai&project_id=1003&initiateBP. The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". A "Workflow Actions" dropdown menu is open, showing options: "-Select-", "Return for Clarification", and "Completed Send for Re".

The main content area is titled "Action Items" and contains several sections:

- General:** Fields for Organization (Department of Administrative Services), 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)).
- Action Details:** Includes a link "(Click here to view latest content)", "To:" and "Cc:" input fields, and a "Send For:" field.
- Collaboration:** A large, empty text area, highlighted with a red rectangular border.
- Task Notes:** A section with a notepad icon and the label "Task Notes".

At the bottom of the form, there are sections for "Attachments (0)", "Linked Records (0)", and "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

Workflow Actions Send

-Select-

Send

Send Save Spelling... Undo Accept Task Add Attachment Close Window

Action Items

General

Organization: Department of Administrative Services

Record Number:

Project Number: OCI-080001

Creator: Katie Tuttle

Project Name: Agency General Projects Test

Creation Date:

Project Location: OAKS CI Administration

Title: Action Item Test *

Status:

Assignee:

Priority: Medium

Meeting Minute: Select...

Due Date: 10/01/2015 07:00 AM (UTC-8) *

Action

Action Requested: Please review the attached document *

Action Details

Collaboration

Waiting for ohio-cim.oracleindustry.com... [Linked Mail \(0\)](#)

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".

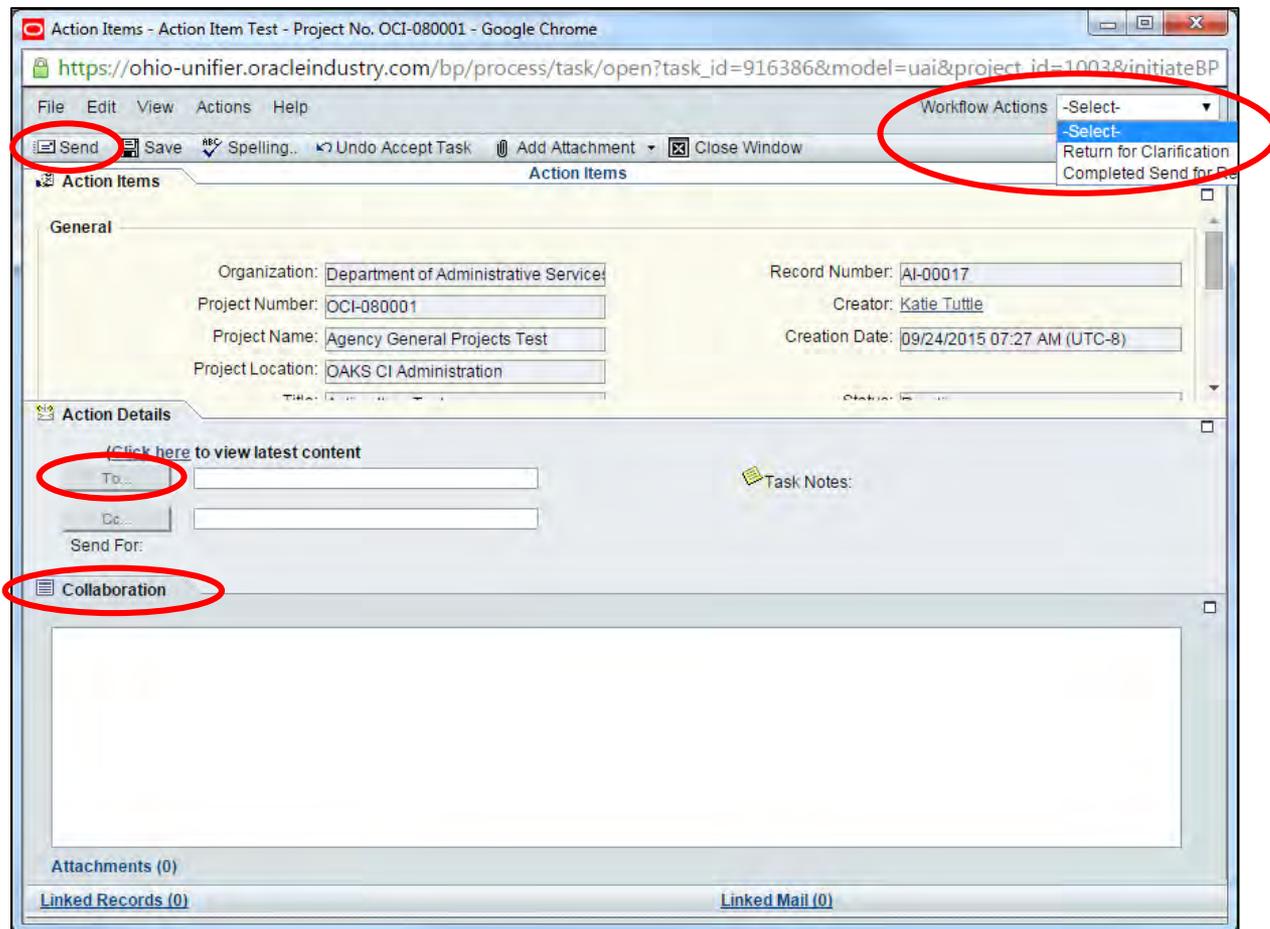
The main content area is divided into sections:

- Action Items**: A tabbed interface with a "General" section containing fields for Organization (Department of Administrative Services), 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 “To” and select desired user to receive record
- ▶ Click Send



Action Details

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

The screenshot displays the Oracle Action Items interface. The main window is titled "Action Items - test action item - Project No. OCI-080001 - Google Chrome". The URL is https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=920379&viewOnly=2&project_id=1003. 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 "Action Items" section is expanded to show "General" information:

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

The "Task Details" section shows:

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

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

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			

At the bottom of the "Action Details" section, there is a link: [\(Click here to view latest content\)](#), which is circled in red. Other sections include "Collaboration" and "Attachments (0)".

Completing Action Item

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

The screenshot displays the Oracle Action Items web interface. The browser window title is "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=916413&model=uai8&project_id=10038&initiate=BP. The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with buttons for "Send", "Save", "Spelling..", "Undo", "Accept Task", "Add Attachment", and "Close Window". The "Send" button is circled in red. To the right, the "Workflow Actions" dropdown menu is open, showing options: "-Select-", "-Select-", "Close", and "Return for Clarification". The "Close" option is highlighted in blue. The main content area is divided into sections: "General" with fields for Organization (Department of Administrative Services), 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)). Below this is the "Action Details" section with a link to view latest content and fields for "To:", "Cc:", and "Send For:". The "Collaboration" section is empty. At the bottom, there are sections for "Attachments (0)", "Linked Records (0)", and "Linked Mail (0)".

Questions?

Please contact OAKS CI Support Desk:

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