



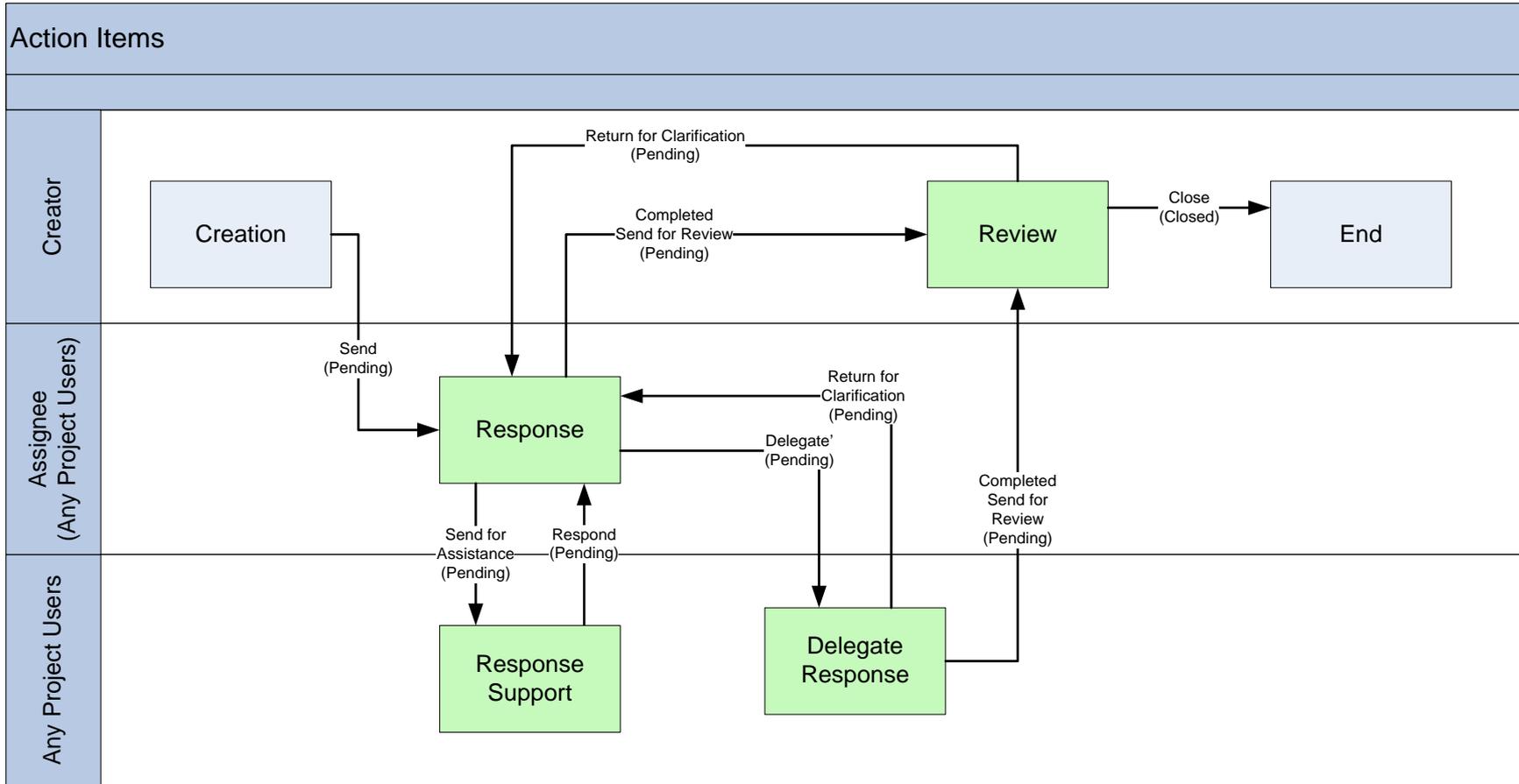
Action Items

K-12 Cloud

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 K12
 - ▶ Click New

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The breadcrumb trail shows 'School Facilities > Talawanda-CS...'. The left sidebar contains a navigation menu with 'Logs' highlighted by a red circle and a red arrow pointing to it. The main content area shows the 'Action Items' table with 16 items. The table has columns for Record No., Title, Assignee, Due Date, Priority, Creation Date, and Status. The 'New' button in the top toolbar is also circled in red.

Record No.	Title	Assignee	Due Date	Priority	Creation Date	Status
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
AI-00003	Test 11/22 Help File		12/29/2008	Medium	12/22/2008	Closed
AI-00002	Remove Login Message re V9.0	Fred	08/18/2008	Medium	08/15/2008	Closed
AI-00001	Test AI		05/02/2008	Low	04/25/2008	Closed

Creating an Action Item

- ▶ Complete the upper form (General)

Create New Action Items K12 - Project No. OCI-140363 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/process/new?project_id=1106&module_name=uaik&csvimport=false

File Edit View Actions Help Workflow Actions -Select-

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

Action Items Action Items K12

General

Project Number: OCI-140363 Record Number:

Project Name: Talawanda-CSD-BUT-CFAP-1-2013 Creator: Katie Tuttle

Organization Name: Talawanda CSD Creation Date:

Facility Name: Status:

Title: Test Action Item * Priority: High

Assignee: Due Date:

Meeting Minute: Select...

Action

Action Requested: Please review the attached document and make comments *

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

FilePath: Action Items FilePath Suffix: Test Action Item

Publish Path: Action Items/ Test Action Item

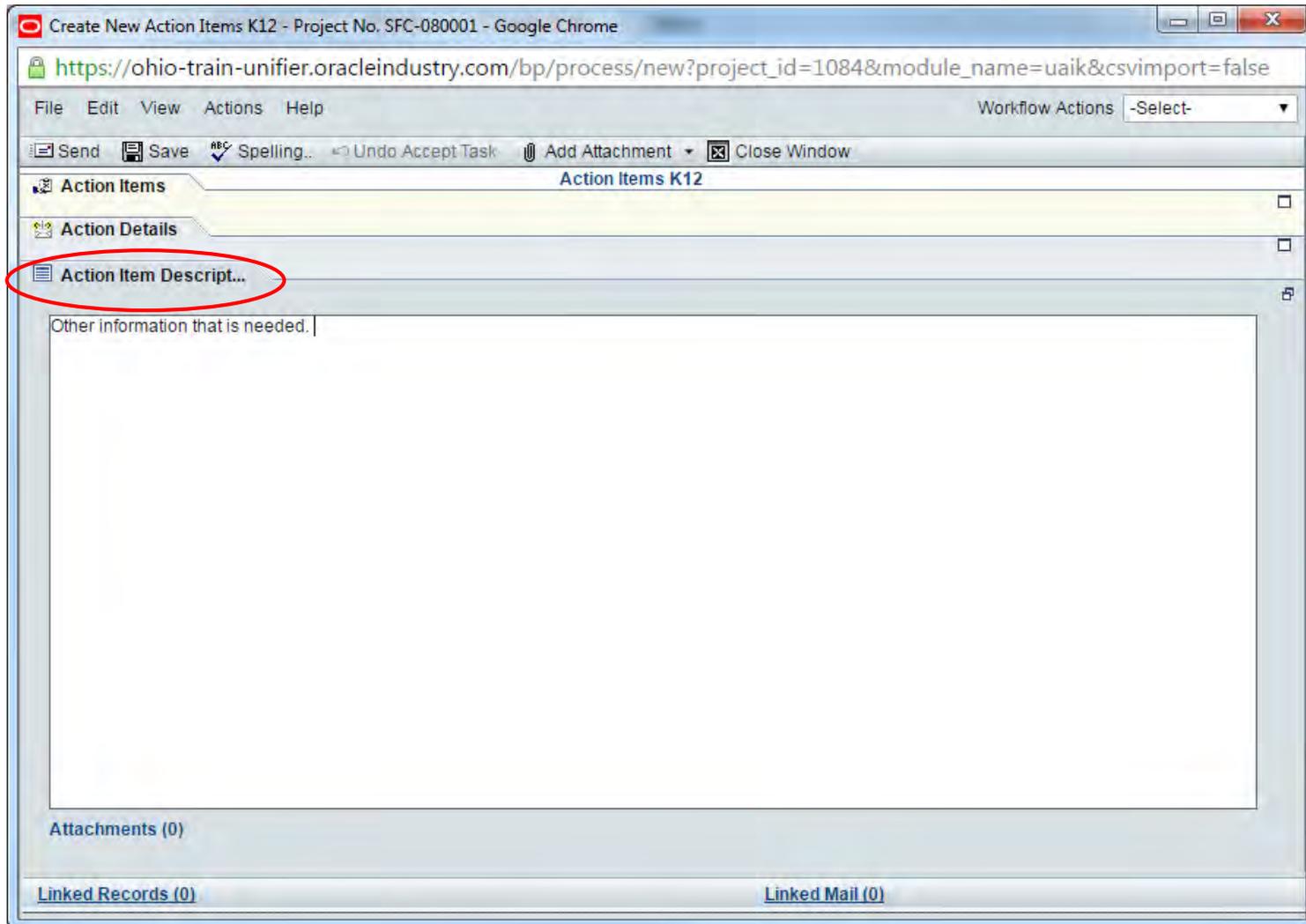
Action Details

Action Item Descript...

Linked Records (0) Linked Mail (0)

Creating an Action Item

- ▶ Plug in any additional information in Action Item Description



Sending an Action Item

- ▶ Choose the Workflow Action: Send
- ▶ Click the “to” button to choose recipient

The screenshot shows the 'Create New Action Items' form in a web browser. The 'Workflow Actions' dropdown menu is set to 'Send', and the 'Send' option is highlighted. The 'Action Details' section shows the 'Send' action selected, and the 'To...' button is highlighted with a red box. A red arrow points from the 'To...' button to the 'User/Group Picker' dialog box, which is open and displaying a list of users and groups. The dialog box shows 18 items, with 'Katie Tuttle' selected. The 'Selected Users/Groups' section at the bottom of the dialog box lists 'Katie Tuttle'.

Workflow Actions: Send

Action Details: Send

To...

User/Group Picker:

Name	Company
Katie Tuttle	State of Ohio
Khori Baylor	State of Ohio
Lindsay Deering	State of Ohio
Michael Davis	Talawanda CSD
Michael Witt	Heapy Engineering
Rhonda Hagemeyer	State of Ohio
Steve Mayo	State of Ohio
Steve Shearer	SHP Leading Design
Todd Hager	State of Ohio

Selected Users/Groups: Katie Tuttle

Sending an Action Item

- ▶ Recipient Populates in the “to” field
- ▶ Click Send

The screenshot displays the 'Create New Action Items K12' web application interface. A red arrow points to the 'Send' button in the top toolbar, which is circled in red. The interface shows a form for creating an action item with the following fields:

- Project Number: OCI-140363
- Record Number: [Empty]
- Project Name: Talawanda-CSD-BUT-CFAP-1-201
- Creator: Katie Tuttle
- Organization Name: Talawanda CSD
- Creation Date: [Empty]
- Facility Name: [Empty]
- Status: [Empty]

The 'Send' button is highlighted, and the 'To...' field is populated with 'Katie Tuttle'. The 'Send For' field is set to 'Response'. The 'Action Item Description' field is empty, and the 'Attachments' and 'Linked Records' counts are both 0.

Reviewing and Responding

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

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&parent_id=0&viewOnly=0&project_id=1. The browser menu includes File, Edit, View, Actions, and Help. Below the menu, there are three buttons: "Accept Task" (circled in red), "Decline Task", and "Close Window".

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

- General:** A form with fields for Organization (Department of Administrative Service), Record Number (AI-00017), Project Number (OCI-080001), Creator (Katie Tuttle), Project Name (Agency General Projects Test), Creation Date (09/24/2015 07:27 AM (UTC-8)), and Project Location (OAKS CI Administration).
- Task Details:** A section containing:
 - From: [Katie Tuttle](#)
 - To: [Katie Tuttle](#)
 - Cc:
 - Sent For: Delegate Response
 - Task Due Date:
 - Task Status: [Not Started](#)
 - Task Notes (0)
- Response List:** A table with columns: Items #, Published Date, Published By, and Company.

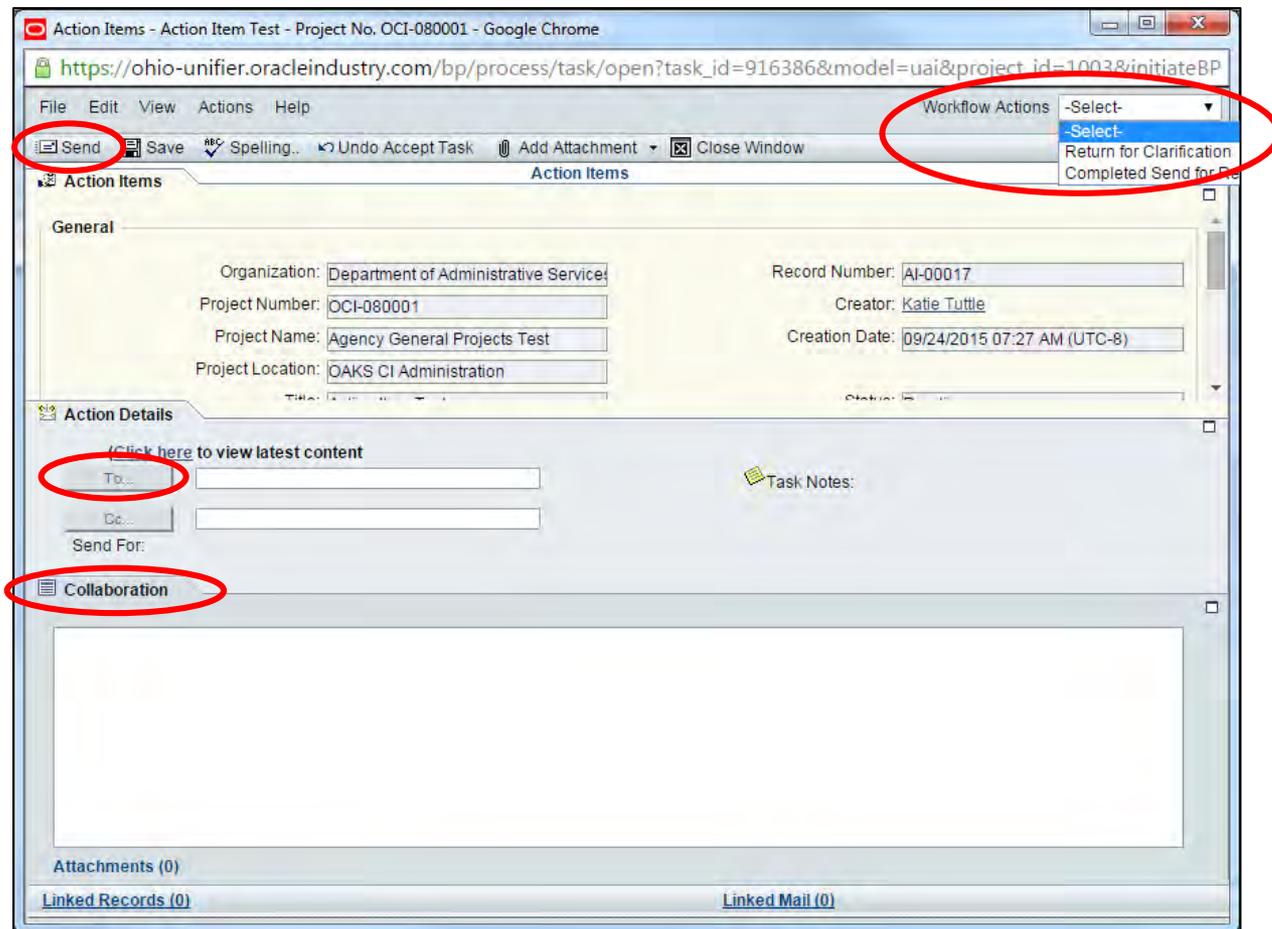
Items #	Published Date	Published By	Company
▲ Action Description - 1	09/24/2015 07:27 AM	Katie Tuttle	soo

Text Comments: Please review the attached document
Attachments: None

At the bottom of the page, there are two links: "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 'Action Details' section is highlighted with a red circle around the text "(Click here to view latest content)". The 'Task Details' section shows the following information:

Task Details

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

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			

At the bottom of the interface, 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

Workflow Actions: -Select-, -Select-, Close, Return for Clarification

Send

Save Spelling.. Undo Accept Task Add Attachment Close Window

General

Organization: Department of Administrative Services Record Number: AI-00017
Project Number: OCI-080001 Creator: Katie Tuttle
Project Name: Agency General Projects Test Creation Date: 09/24/2015 07:27 AM (UTC-8)
Project Location: OAKS CI Administration

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:

Collaboration

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

Questions?

Please contact OAKS CI Support Desk:

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