



Action Items

K-12 Cloud

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

- ▶ In OAKS CI
Navigate to:
 - ▶ Logs -> Action Item K12
 - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'ORACLE' and 'PRIMAVERA Unifier (Development)'. Below this, there are tabs for 'School Facilities' and 'Oak Hills Local ...'. The left sidebar contains a list of navigation items: 'Oak Hills Local Building Project - ...', 'XAM Patients', 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Mailbox', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', and 'Action Items K12'. The 'Logs' item is circled in red, and a red arrow points to it. Below 'Logs', a list of sub-items is visible, including 'Advertisements K12', 'Applications for Payment K12', 'Certified Payrolls K12', 'Closeout - Contractor K12', 'Contract K12', 'Contract Modification K12', 'Contract Schedule of Values ...', 'Design Reviews K12', and 'Energy Accounts K12'. The main content area displays 'Action Items K12' with a '+ Create' button circled in red. Below the button, there is a table with columns 'Record No' and 'Title'. The table contains 17 records, with the first few being: AI-0017 (Denny Raberding), AI-0016 (Andy Bixler), AI-0015 (CATHY DOSECK), AI-0014 (Katie Tuttle), AI-0013 (testing), AI-0012 (Task), AI-0011 (Cheryl Dalhamer), AI-0010 (Michael Hamilton), AI-0009 (Brandelyn Hollingswor), AI-0008 (Action Item - Ryan Mee), AI-0007 (Jennifer Jones), AI-0006 (Andy Rogers), AI-0005 (Stacey Thomas), AI-0004 (Brad Martin), AI-0003 (Adam Huwer), AI-0002 (Test Action Item 3), and AI-0001 (Test Action Item). The total number of records is 17.

Record No	Title
AI-0017	Denny Raberding
AI-0016	Andy Bixler
AI-0015	CATHY DOSECK
AI-0014	Katie Tuttle
AI-0013	testing
AI-0012	Task
AI-0011	Cheryl Dalhamer
AI-0010	Michael Hamilton
AI-0009	Brandelyn Hollingswor
AI-0008	Action Item - Ryan Mee
AI-0007	Jennifer Jones
AI-0006	Andy Rogers
AI-0005	Stacey Thomas
AI-0004	Brad Martin
AI-0003	Adam Huwer
AI-0002	Test Action Item 3
AI-0001	Test Action Item

Creating an Action Item

- ▶ Complete the General Tab

Create New Action Items K12 - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3021&module_name=uaik&project_id=1086&_ur

File Edit View Actions Help

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

Action Items **Action Items K12**

General

Project Number: SFC-080001.01 Record Number:

Project Name: Oak Hills Local Building Project Creator: [Katie Tuttle](#)

Organization Name: Creation Date:

Facility Name: Status:

Title: Test Action Item * Priority: High

Assignee: Due Date: 06/30/2017 05:00 PM (UTC-8) *

Meeting Minute: Select...

Action

Action Requested: Please provide a response to the attached document *

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

Action Details

Action Item Descript...

Linked Records (0) Linked Mail (0)

Sending an Action Item

- ▶ Verify Workflow Action
- ▶ Click the “To” button to choose recipient

The screenshot displays the 'Create New Action Items' interface in Mozilla Firefox. The browser address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3021&module_name=uaik&project_id=1086&_ur. The 'Workflow Actions' dropdown menu is set to 'Send'. The 'Action Items' section is titled 'Action Items K12'. The 'General' section contains the following information:

- Project Number: SFC-080001.01
- Record Number: [Empty]
- Project Name: Oak Hills Local Building Project
- Creator: Katie Tuttle
- Organization Name: [Empty]
- Creation Date: [Empty]
- Facility Name: [Empty]

The 'Action Details' section shows the 'Send' button with a 'To...' button highlighted by a red box. A red arrow points from the 'To...' button to the 'User/Group Picker' dialog box. The dialog box is titled 'User/Group Picker - Google Chrome' and shows a list of users and groups. The 'List Names from' dropdown is set to 'Talawanda-CSD-BUT-CFAP-1' and 'Show By' is set to 'Users/Groups'. The 'Users/Groups' section shows 18 items, with 'Katie Tuttle' selected. The 'Selected Users/Groups' section shows 'Katie Tuttle'.

Sending an Action Item

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

Create New Action Items K12 - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3021&module_name=uaik&project_id=1086&_ur

File Edit View Actions Help

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

Action Items Action Items K12

General

Project Number: SFC-080001.01 Record Number:

Project Name: Oak Hills Local Building Project Creator: [Katie Tuttle](#)

Organization Name: Creation Date:

Facility Name: Status:

Action Details

Send

To... Archana Atrey, Katie Tuttle, Rita Nichols, Shauna

Cc...

Send For: Response

Action Item Descript...

Attachments (1)

Linked Records (0) Linked Mail (0)

Next Step: Reviewing and Responding

- ▶ Click Accept Task to begin review and response

The screenshot shows a web browser window titled "Action Items K12 - Test Action Item - Project No. SFC-080001.01 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oradeindustry.com/bp/process/task/open?task_id=186929&parent_id=0&viewOnly=0&project_id=1086&__uref=uuu146:navigator-2. The browser menu includes File, Edit, View, Actions, and Help. Below the menu, there are buttons for "Accept Task" (circled in red), "Decline Task", "Review", and "Close Window".

The main content area is titled "Action Items K12" and is divided into several sections:

- General:** Contains form fields for Project Number (SFC-080001.01), Project Name (Oak Hills Local Building Project), Organization Name, Facility Name, Record Number (AI-0018), Creator (Katie Tuttle), Creation Date (06/19/2017 11:38 AM (UTC-8)), and Status (Pending).
- Task Details:** Shows "From: Katie Tuttle", "To: Archana Atrey; Katie Tuttle; More..", "Cc:", "Sent For: Response", "Task Due Date:", "Task Status: Not Started", "Task Notes (0)", and "Workflow Progress".
- Response List:** A table with columns: Items #, Published Date, Published By, and Company. The table contains one entry: "Action Description - 1" published on "06/19/2017 11:38 AM" by "Katie Tuttle" from company "soo". Below the table, it shows "Text Comments: None" and "Attachments: (1)".
- Linked Records (0)** and **Linked Mail (0)** are shown at the bottom.

Reviewing and Responding

- ▶ Enter any notes or response in the Action Item Description tab
- ▶ Select Workflow Action
- ▶ Click Send

The screenshot shows a web browser window titled "Action Items K12 - Test Action Item - Project No. SFC-080001.01 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186929&model=uaik&project_id=1086&initiateBP=&bulkautoaccept=&fromRefLog=&_u. A red arrow points to the "Send" button in the top toolbar.

The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with buttons for "Send", "Save", "Spelling...", "Undo", "Accept Task", "Add Attachment", "Review", and "Close Window".

The main content area is titled "Action Items K12" and contains a sidebar with a "Workflow Actions" menu. The menu is open, showing options: "Completed Send", "Completed Send For Review", "Delegate", and "Send For Assistance". The "Completed Send For Review" option is highlighted.

The main content area displays form fields for project details:

- Project Number: SFC-080001.01
- Project Name: Oak Hills Local Building Project
- Organization Name: [Empty]
- Facility Name: [Empty]
- Record Number: AI-0018
- Creator: Katie Tuttle
- Creation Date: 06/19/2017 11:38 AM (UTC-8)
- Status: Pending

The "Action Details" section shows the selected action "Completed Send For Review" with a link to view latest content. It includes "To..." and "Cc..." fields, both containing "Katie Tuttle". The "Send For:" field is set to "Review".

The "Action Item Description..." section contains a large text area with the placeholder text "This is a place for response".

At the bottom, there are sections for "Attachments (0)", "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: Close [v] [Send]

Action Items: Close [v]

Return for Clarification

Project Number: SFC-080001.01

Record Number: AI-0018

Project Name: Oak Hills Local Building Project

Creator: Katie Tuttle

Organization Name:

Creation Date: 06/19/2017 11:38 AM (UTC-8)

Facility Name:

Status: Pending

Close [Click here to view latest content](#)

To... [input]

Cc... [input]

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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