



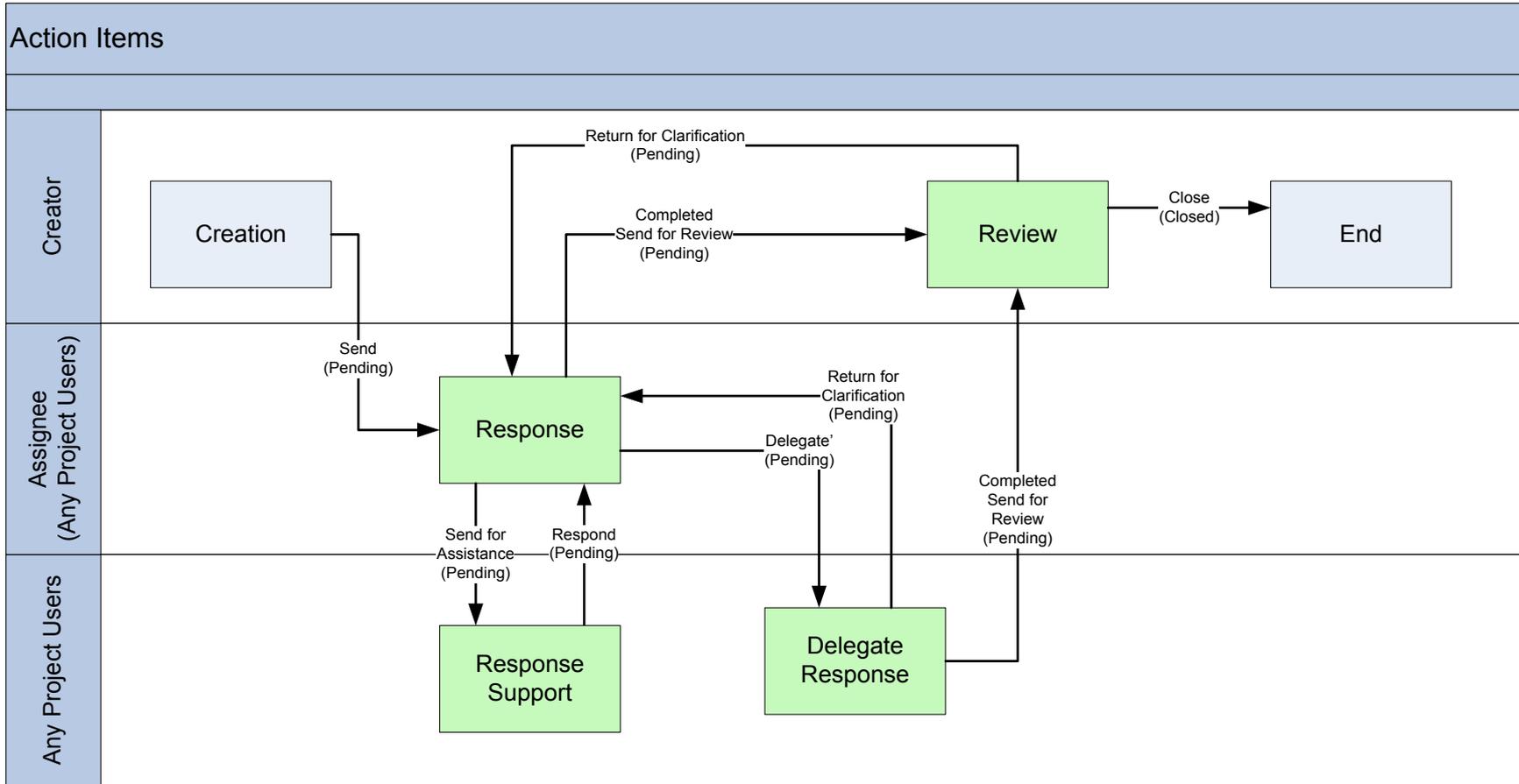
Action Items

K-12 Legacy

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

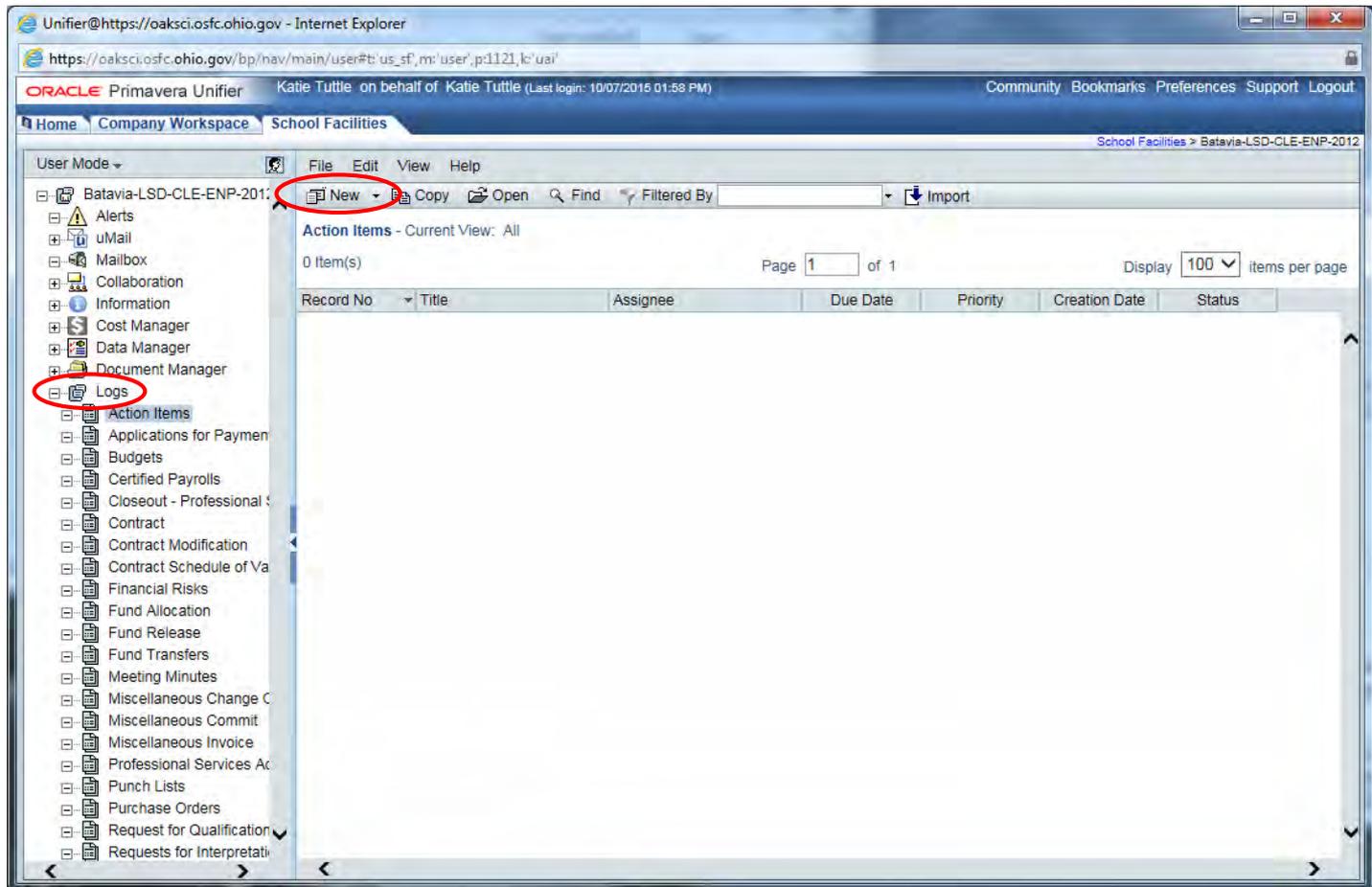


Examples of Action Items

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

Creating an Action Item

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



Creating an Action Item

- ▶ Complete the upper form (General)

Create New Action Items - Project No. SFC-140359 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1061&module_name=uai&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

The screenshot shows a web browser window titled "Create New Action Items - Project No. SFC-140359 - Internet Explorer". The address bar displays the URL: https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1061&module_name=uai&csvimport=false. The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". A toolbar contains icons for "Send", "Save", "Spelling...", "Undo Accept Task", "Add Attachment", and "Close Window". The main content area is divided into three tabs: "Action Items", "Action Details", and "Action Item Descript...". The "Action Item Descript..." tab is highlighted with a red circle. Below the tabs is a large text input field containing the placeholder text "Other information that is needed." 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 the “to” button to choose recipient

The screenshot displays the 'Create New Action Items' interface in Internet Explorer. The browser address bar shows the URL: https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1061&module_name=uai&csvimport=false. The 'Workflow Actions' dropdown menu is set to 'Send', and the 'Send' option is highlighted. The 'Action Items' section is titled 'Action Items K12' and includes a 'General' tab with fields for Project Number (OCI-140363), Project Name (Talawanda-CSD-BUT-CFAP-1-201), Organization Name (Talawanda CSD), and Facility Name. The 'Action Details' section shows the 'Send' action with a 'To...' button highlighted in a red box. A red arrow points from this button to a 'User/Group Picker' window. The picker window shows a list of users and groups, with 'Katie Tuttle' selected. The 'Selected Users/Groups' section at the bottom of the picker window lists 'Katie Tuttle'.

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

Sending an Action Item

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

Create New Action Items - Project No. SFC-140359 - Internet Explorer

https://oakscivofc.ohio.gov/bp/process/new?project_id=1061&module_name=uai&csvimport=false

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: OCI-140363 Record Number:

Project Name: Talawanda-CSD-BUT-CFAP-1-201 Creator: Katie Tuttle

Organization Name: Talawanda CSD Creation Date:

Facility Name: Status:

Action Details

Send

To... Katie Tuttle Task Notes:

Cc...

Send For: Response

Action Item Descript...

Other information that is needed

Attachments (0)

Linked Records (0) Linked Mail (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 - ASI No. 1 - Project No. SFC-140346.01 - Internet Explorer". The address bar shows the URL: https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=516&model=uai&fromcostlog=1&project_id=1060. 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 the following fields:
 - 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
- Task Details:** A section with the following information:
 - From: Katie Tuttle;
 - Task Due Date:
 - To: Katie Tuttle;
 - Task Status: Not Started
 - Cc:
 - Sent For: Delegate Response
 - Task Notes (0)
- Response List:** A table with the following data:

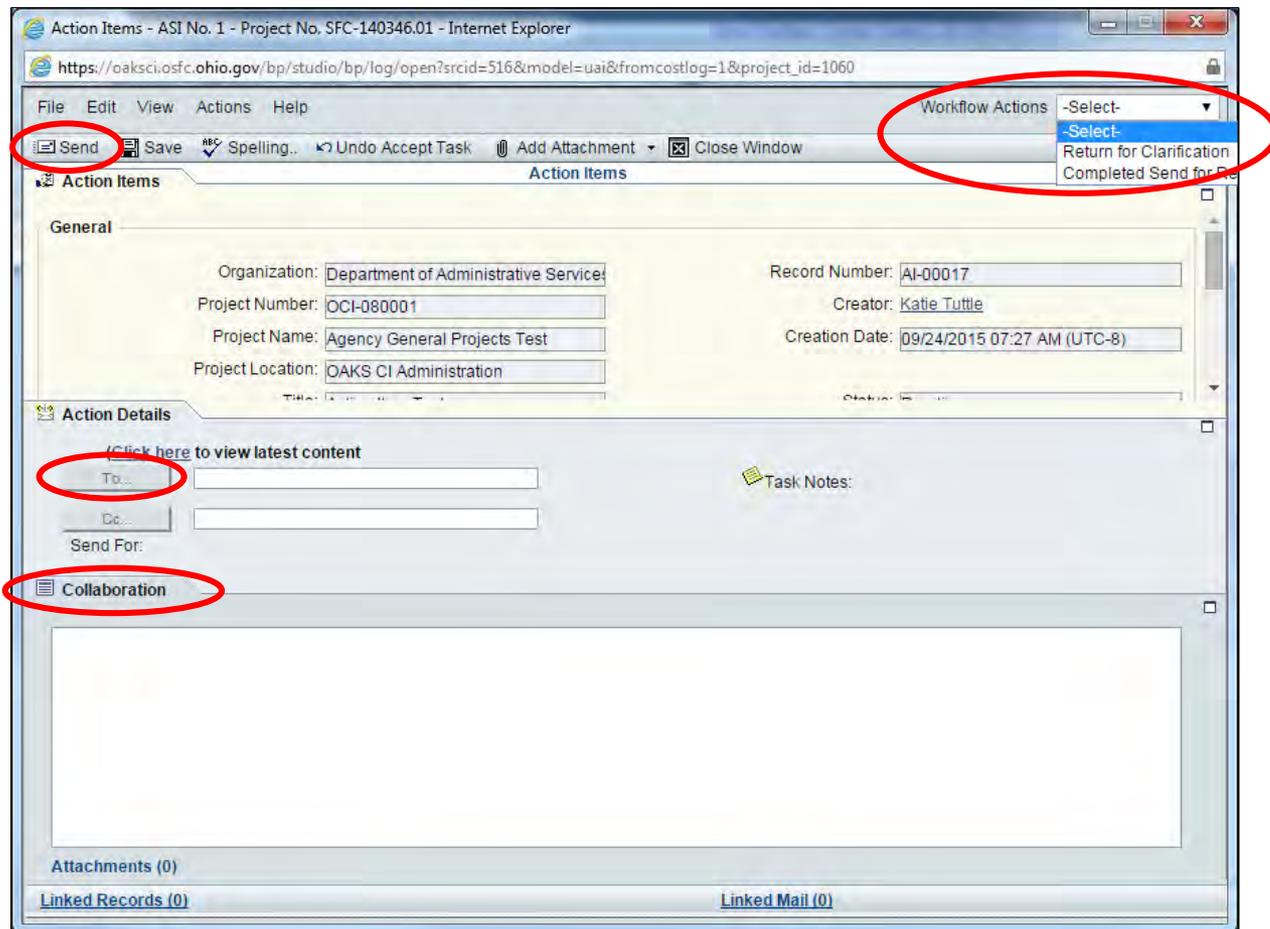
Items #	Published Date	Published By	Company
Action Description - 1	09/24/2015 07:27 AM	Katie Tuttle	soo

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 left screenshot shows the 'Action Details' section of the web application. The text "(Click here to view latest content)" is circled in red. A red arrow points from this text to the right screenshot.

The right screenshot shows the 'Action Items' page. The 'Response List' table contains 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			

Completing Action Item

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

The screenshot displays the 'Action Items' web application interface. The browser window title is 'Action Items - ASI No. 1 - Project No. SFC-140346.01 - Internet Explorer'. The URL is https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=516&model=uai&fromcostlog=1&project_id=1060. 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' (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, Creation Date: 09/24/2015 07:27 AM (UTC-8)), 'Action Details' (with a link to view latest content and fields for To, Cc, and Send For), and 'Collaboration'. At the bottom, there are sections for 'Attachments (0)', 'Linked Records (0)', and 'Linked Mail (0)'.

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211