

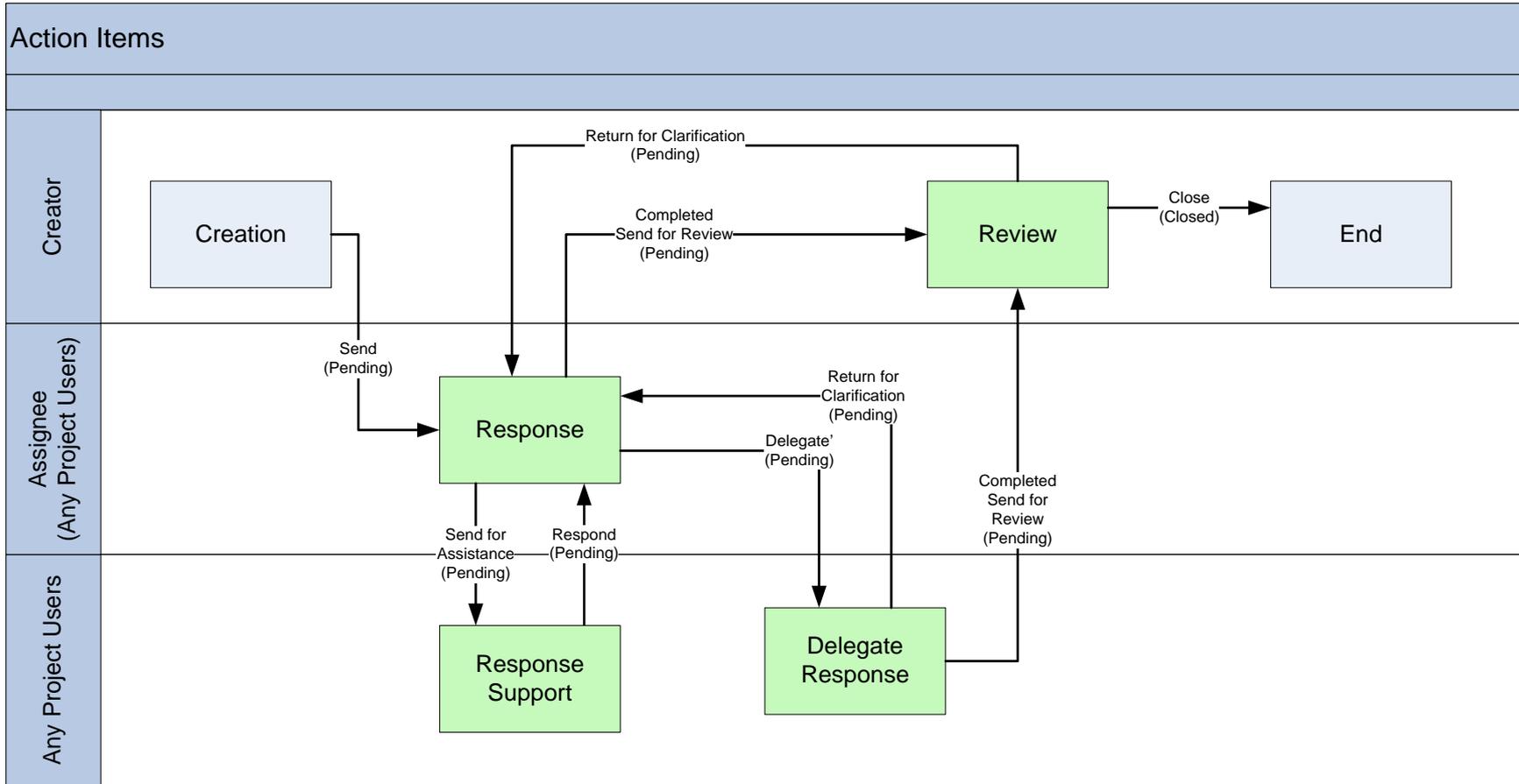


Action Items

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 interface. The browser address bar shows the URL: <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The application header includes the Oracle Primavera Unifier logo and the text "Last login: 09/22/2016 01:28 PM". The breadcrumb navigation path is: Agency > OAKS CI Adm... > Agency Gener... The left-hand navigation menu is expanded to show the "Logs" folder, which is circled in red. Under "Logs", the "Action Items" folder is selected and highlighted in blue. The main content area displays a table titled "Action Items - Current View: All" 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)

The screenshot shows a web browser window titled "Create New Action Items - Project No. OCI-080001 - Google Chrome". The URL is https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=uai&csvimport=false. The browser's menu bar includes File, Edit, View, Actions, and Help. The toolbar contains icons for Send, Save, Spelling, Undo Accept Task, Add Attachment, and Close Window. The main content area is titled "Action Items" and is divided into two sections: "General" and "Action".

The "General" section is highlighted with a red border and contains the following fields:

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

The "Action" section contains a text area for "Action Requested:" *

At the bottom of the form, there are tabs for "Action Details" and "Collaboration", and links for "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 address bar contains the URL: 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 is divided into several sections:

- General:** Contains 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:" label.
- Collaboration:** This section is highlighted with a red border and is currently empty.

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

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-oim.oracleindustry.com... [Linked Mail \(0\)](#)

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

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

Task Details

From: Katie Tuttle; Task Due Date: Task Notes (0)

To: Katie Tuttle; Task Status: Not Started

Cc:

Sent For: Delegate Response

Response List

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

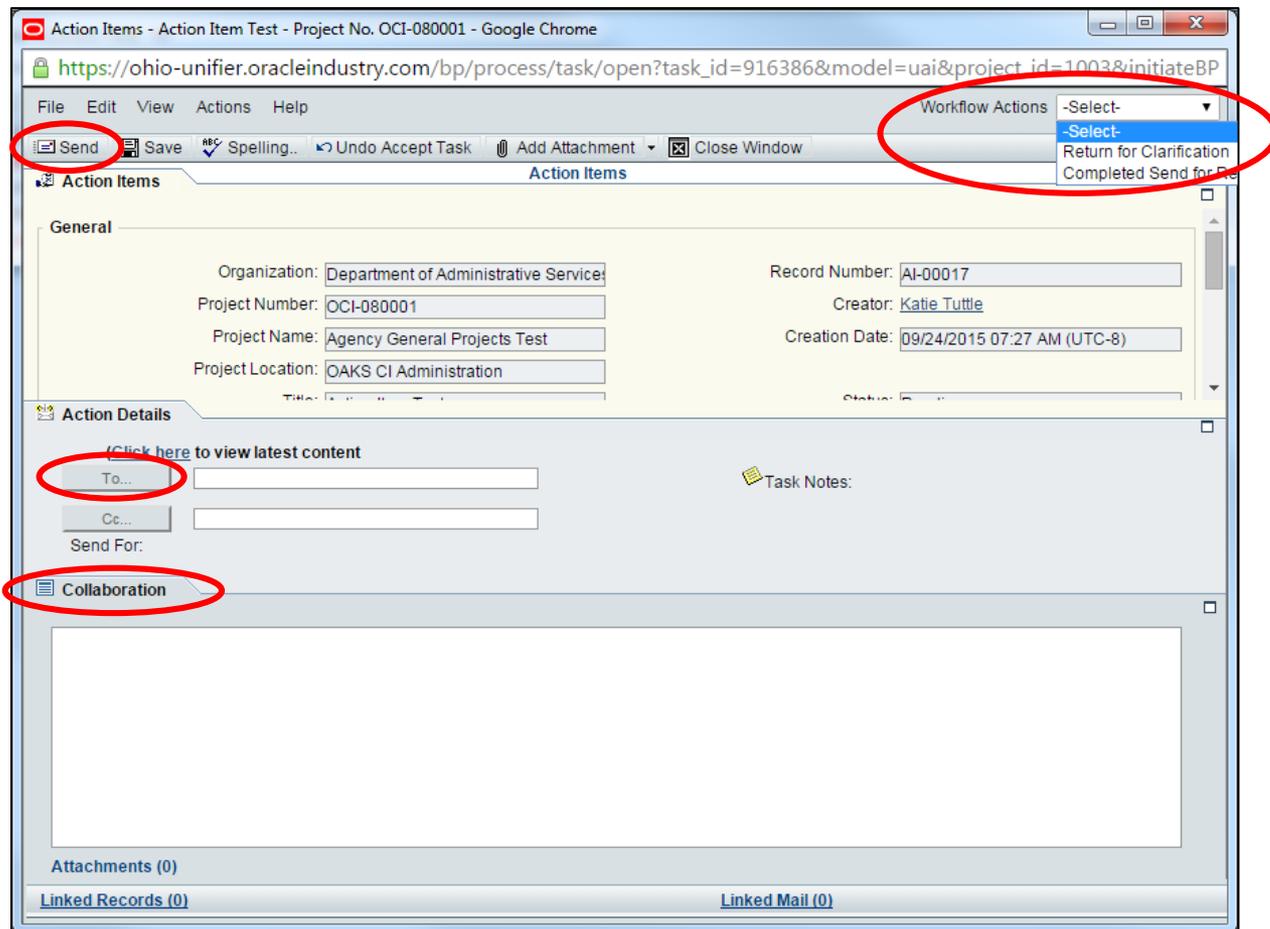
Text Comments: Please review the attached document

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 Details

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

The screenshot displays the Oracle Action Items interface. The main window shows the 'Action Details' section for a task. A red circle highlights the link '(Click here to view latest content)' in the 'Action Details' section. The task details include:

- General:** Organization: Department of Administrative Services, Record Number: AI-00018, Project Number: OCI-080001, Creator: Katie Tuttle, Project Name: Agency General Projects Test, Creation Date: 10/05/2015 11:19 AM (UTC-8).
- Task Details:** From: Katie Tuttle, Task Due Date: Not Applicable, Task Status: View Only, Sent For: Delegate Response.
- Response List:** A table with columns: Items #, Published Date, Published By, Company.

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 window, 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

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=uai&project_id=1003&initiateBP. 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 input 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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