



Action Items

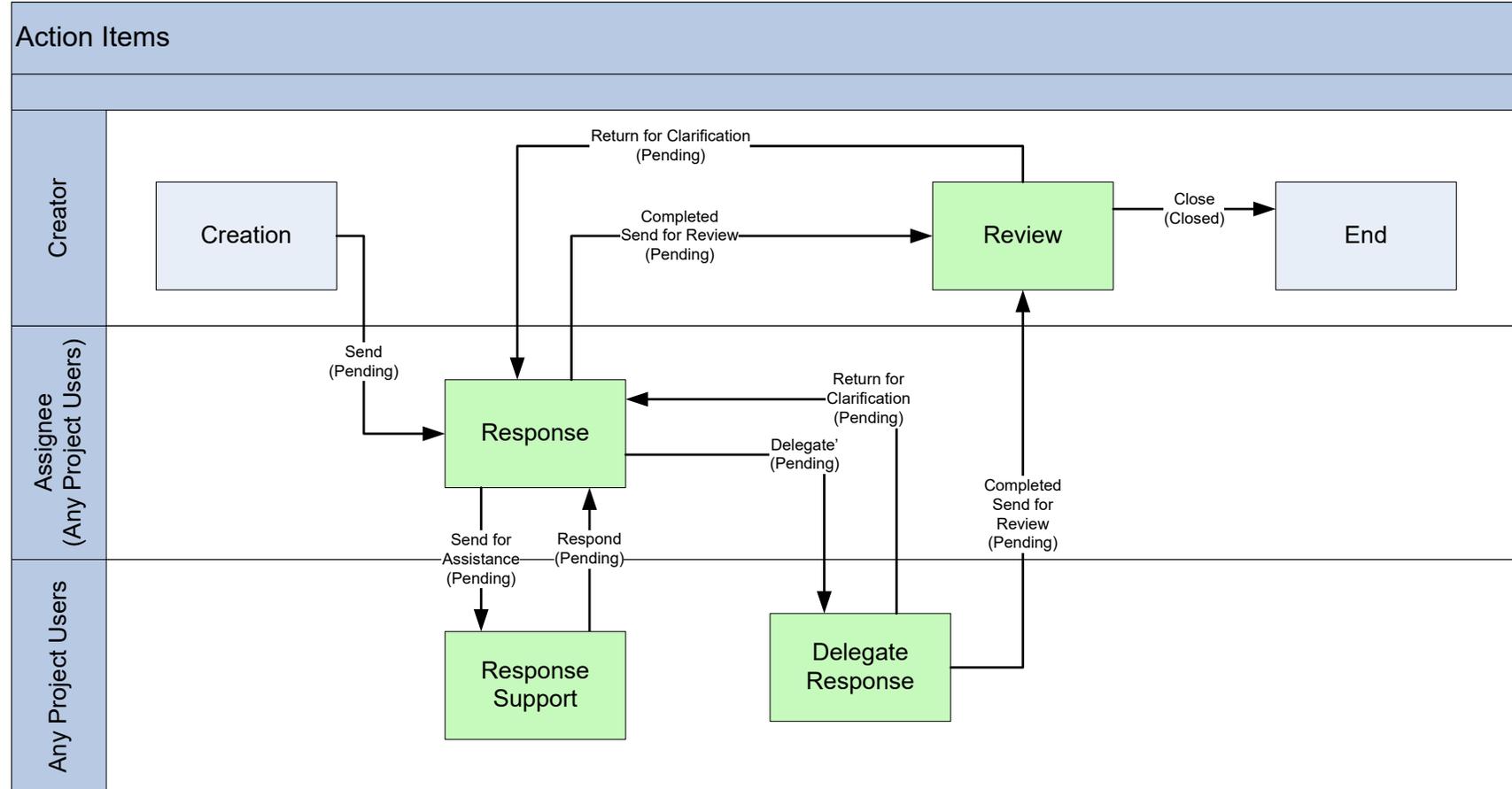
Agency Higher Ed

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 Create

The screenshot shows the Oracle Primavera Unifier (Test) interface. The breadcrumb navigation is Agency > OAKS CI Training > OAKS CI Train. The left sidebar menu is expanded to show 'Logs' (circled in red) and 'Action Items' (indicated by a red arrow). The 'Action Items' section is active, showing a '+ Create' button (circled in red) and a table of records. The table has columns for Record No and Title. The total number of records is 396.

Record No	Title
AI-00396	mmw-Test Action Item
AI-00395	Oracle072018a
AI-00394	Todd Cooper
AI-00393	Test Action Item
AI-00392	Student 3
AI-00391	Larry
AI-00390	Jason Retherford
AI-00389	rawwial
AI-00388	Test Action Item
AI-00387	change order 1
AI-00386	skip
AI-00385	Dave Parkinson
AI-00384	Tyler D
AI-00383	cynthia
AI-00382	Jay Test
AI-00381	Matt
AI-00380	Jim
AI-00379	Scott
AI-00378	kevin
AI-00377	Shauna
AI-00376	Beth
AI-00375	Training 3/1/11
AI-00374	Training 3/1/11
AI-00373	Training 3/1/11
AI-00372	Training 3/1/11
AI-00371	Training 3/1/11
AI-00370	Training 3/1/11

Total: 396



Creating an Action Item

- ▶ Complete the General and Action forms under the **Action Items** tab

Create New Action Items - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uai/1006/208?_uref=uuu983826795t2

Create New Action Items

Send Save

Action Items Collaboration Response List

General

Organization	Record Number
Department of Administrative Services	
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	
Project Location	Status
Surface Road	
Title *	Priority
Test AI20201	Medium
Assignee	Due Date *
Architect	08/28/2020 07:58 AM (UTC-8)
Meeting Minute	
Type a Old Title...	

Action

Action Requested *

ASI Information

Linked Records

Add

Information

No Linked Records.



Creating an Action Item

- ▶ Click the **Collaboration** tab and enter any additional text or attachment information needed

Create New Action Items - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uai/1006/208?_uref=uuu983826795t2

Create New Action Items Send Save

Action Items: **Collaboration** Response List

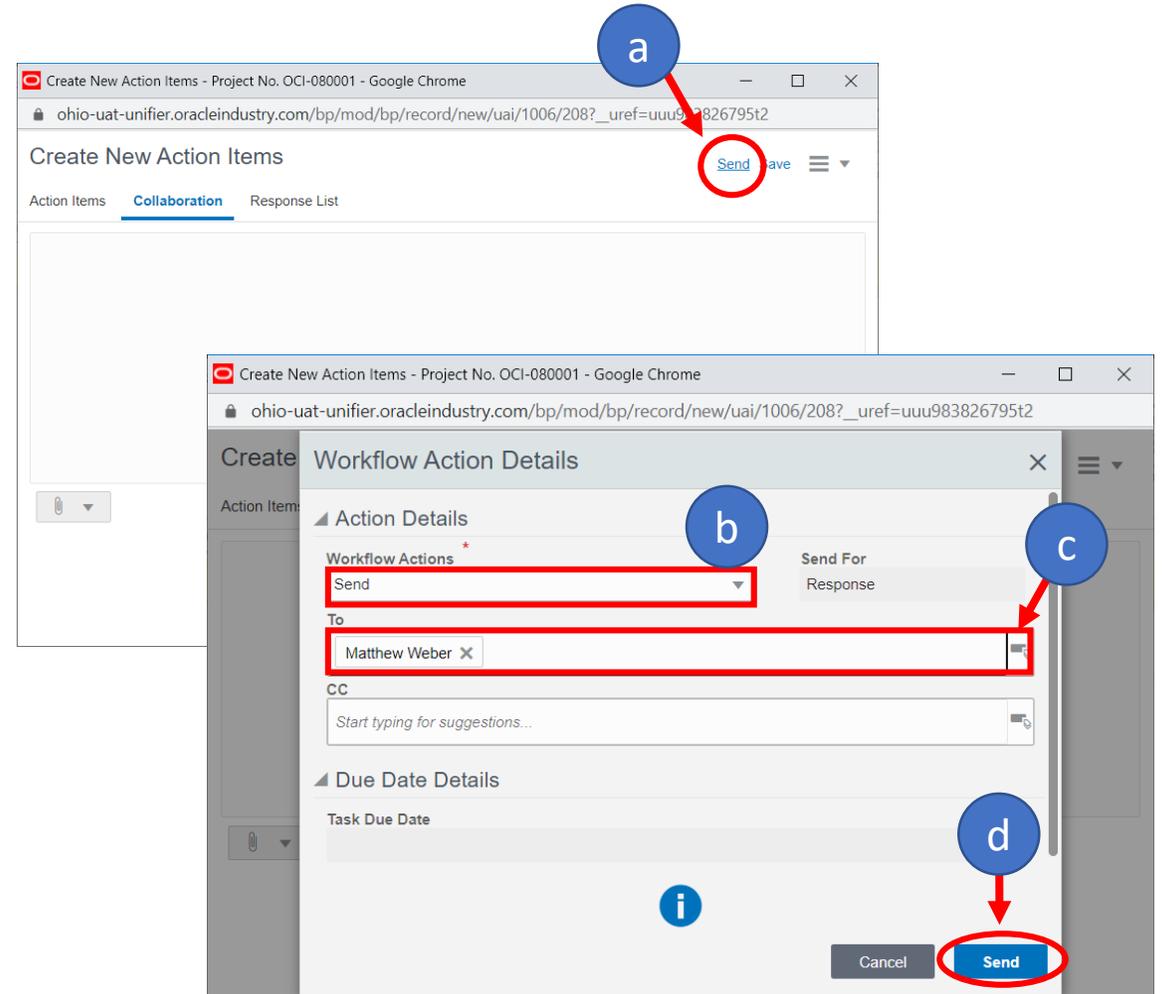
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Sending an Action Item

- a) When the record is ready to move forward, click **Send**
- b) Verify Workflow Action: **Send**
- c) Enter the recipient of the Action Item in the **To** field
- d) Click **Send**



Reviewing and Responding

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- a) Note who sent Task
- b) Review Response List
- c) Accept Task

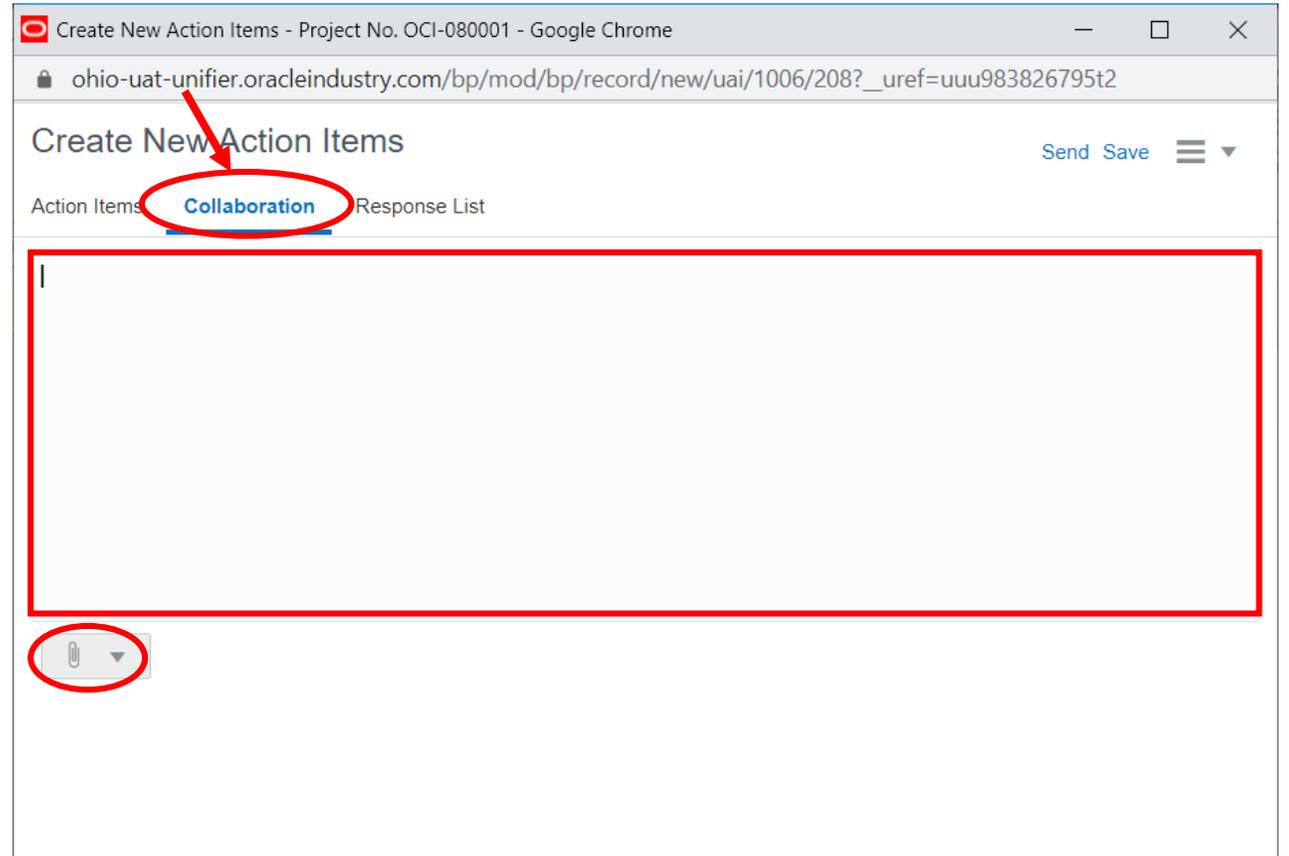
The screenshot shows a web browser window titled "Action Items - Test AI20201 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindust.../mod/bp/record/opentask/216374?task_id=216374&parent_id=0&viewOnly=0&projec...". The page displays an "Action Items" record with the following details:

- Action Items:** "Response List" (circled in red, with annotation 'b' pointing to it).
- Task Details:**
 - From:** "Matthew Weber" (circled in red, with annotation 'a' pointing to it).
 - To:** "Matthew Weber"
 - Sent For:** "Response"
- General:**
 - Organization:** "Department of Administrative Services"
 - Project Number:** "OCI-080001"
 - Project Name:** "OAKS CI Training 1"
 - Project Location:** (empty)
 - Record Number:** "AI-00397"
 - Creator:** "Matthew Weber"
 - Creation Date:** "08/21/2020 09:25 AM (UTC-8)"
- Linked Records:** "No Linked Records." (with an information icon 'i')
- Buttons:** "Accept" and "Decline" (both circled in red, with annotation 'c' pointing to them).



Reviewing and Responding

- ▶ Click the **Collaboration** tab and enter any additional text or attachment information needed

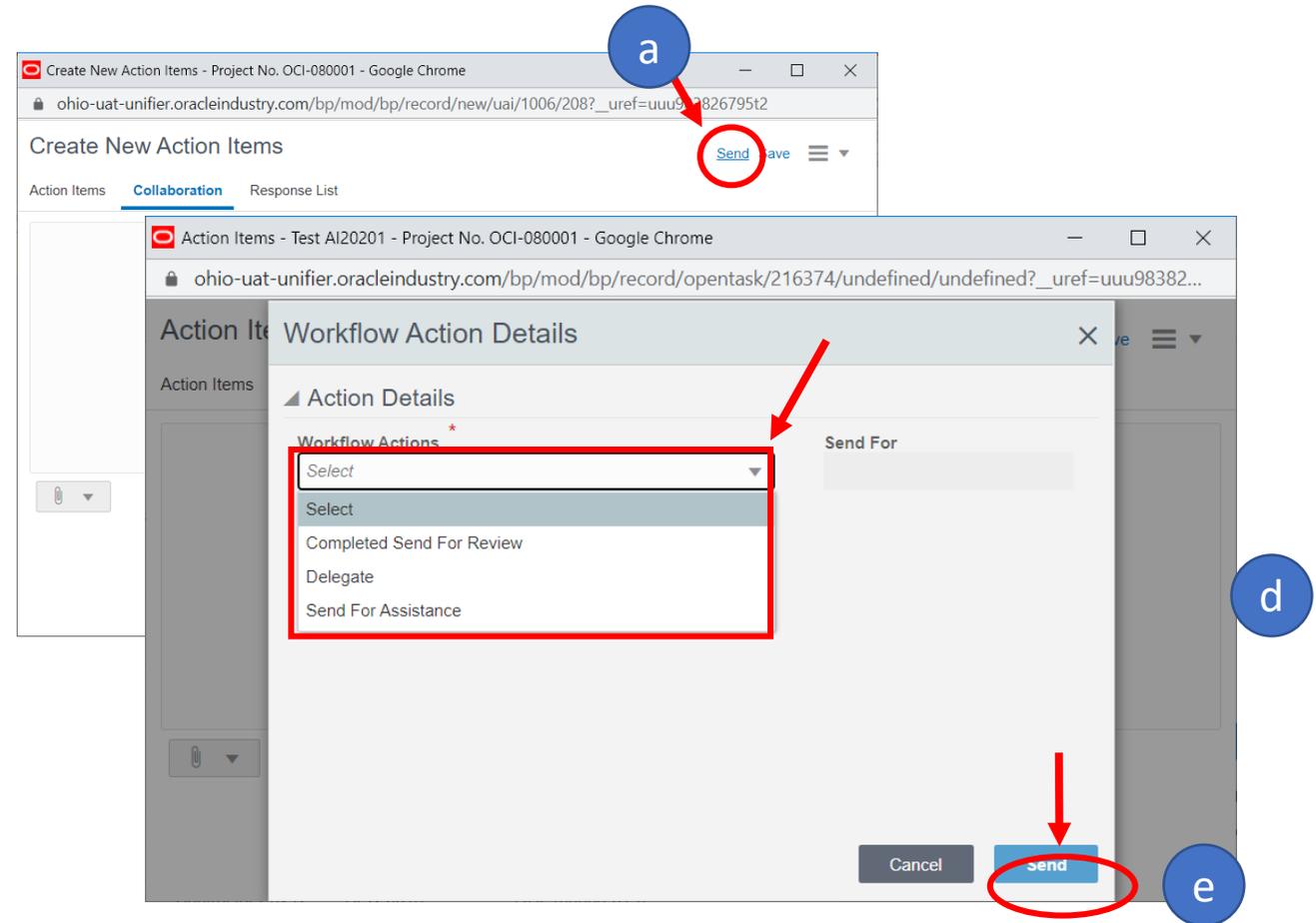


The screenshot shows a web browser window titled "Create New Action Items - Project No. OCI-080001 - Google Chrome". The address bar shows the URL "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uai/1006/208?_uref=uuu983826795t2". The page content includes the heading "Create New Action Items" with "Send Save" and a menu icon to the right. Below the heading, there are three tabs: "Action Items", "Collaboration", and "Response List". The "Collaboration" tab is highlighted with a red circle and a red arrow points to it. A large red rectangular box highlights the main text input area. Below the input area, there is an attachment icon (a paperclip) which is also circled in red.



Sending an Action Item

- a) Enter Collaboration notes
- b) When the record is ready to move forward, click **Send**
- c) Verify Workflow Action: **Send**
- d) Enter the recipient of the Action Item in the **To** field
- e) Click **Send**



Review and Send Action Item

- ▶ Enter any notes or response in the Action Item

a) When the record is ready to move forward, click **Send**

b) Select Workflow Action:

- ▶ **Completed Send For Review**
- ▶ **Delegate**
- ▶ **Send for Assistance**

c) If necessary, add a recipient

d) Click **Send**

The image consists of three overlapping screenshots from a web browser, illustrating the process of reviewing and sending an action item. The top screenshot shows the 'Create New Action Items' page with a 'Send' button circled in red and labeled 'a'. The middle screenshot shows the 'Workflow Action Details' dialog box with a dropdown menu for 'Workflow Actions' open, showing options like 'Completed Send For Review', 'Delegate', and 'Send For Assistance', with the dropdown area circled in red and labeled 'b'. The bottom screenshot shows the same dialog box with 'Completed Send For Review' selected, a recipient 'Matthew Weber' entered in the 'To' field (circled in red and labeled 'c'), and the 'Send' button at the bottom right circled in red and labeled 'd'.



Completing Action Item

▶ As the last step of the workflow:

- a) When all necessary work on this record has been completed click **Send**
- b) Select Workflow Action: **Close**
- c) Click **Send**

The image consists of three overlapping screenshots from a web browser showing the 'Action Items' interface. The top screenshot shows the 'Action Items' page with a 'Send' button circled in red and labeled 'a'. The middle screenshot shows the 'Workflow Action Details' dialog box with the 'Workflow Actions' dropdown menu open, showing 'Close' selected, and labeled 'b'. The bottom screenshot shows the 'Workflow Action Details' dialog box with the 'Send' button circled in red and labeled 'c'.



Questions?

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