



Action Items

K12

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
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- ▶ 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 left sidebar contains a navigation menu with the following items: Oak Hills Local Building Project - ..., XAM Patients, Alerts, Tasks, Notifications, Drafts, uMail, Mailbox, Information, Cost Manager, Data Manager, Document Manager, Logs, Action Items K12, 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 'Logs' item is circled in red, and a red arrow points to it. The 'Action Items K12' item is also highlighted. The main content area displays the 'Action Items K12' list with a '+ Create' button circled in red. The list contains 17 records with columns for Record No and Title.

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 Hollingswo
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

Total: 17



Creating an Action Item

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

Create New Action Items K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uai/1086/3021?__uref=uuu983826795t4

Create New Action Items K12

Send Save

Action Items Action Item Description Response List

General

Project Number: SFC-080001.01

Record Number: [Empty]

Project Name: Oak Hills Local Building Project

Creator: Matthew Weber

Organization Name: [Empty]

Creation Date: [Calendar Icon]

Facility Name: [Empty]

Status: [Empty]

Title *: Test Action Item

Priority: High

Assignee: [Empty]

Due Date *: MM/DD/YYYY HH:MM AM [Calendar Icon]

Meeting Minute: Type a Title... [Dropdown Icon]

Action

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

Linke > [Add]

Information
No Linked Records.



Creating an Action Item

- ▶ Click the **Action Item Description** tab and enter any additional text or attachment information needed

Create New Action Items K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uaik/1086/3021?__uref=uuu983826795t4

Create New Action Items K12 Send Save

Action Items **Action Item Description** Response List

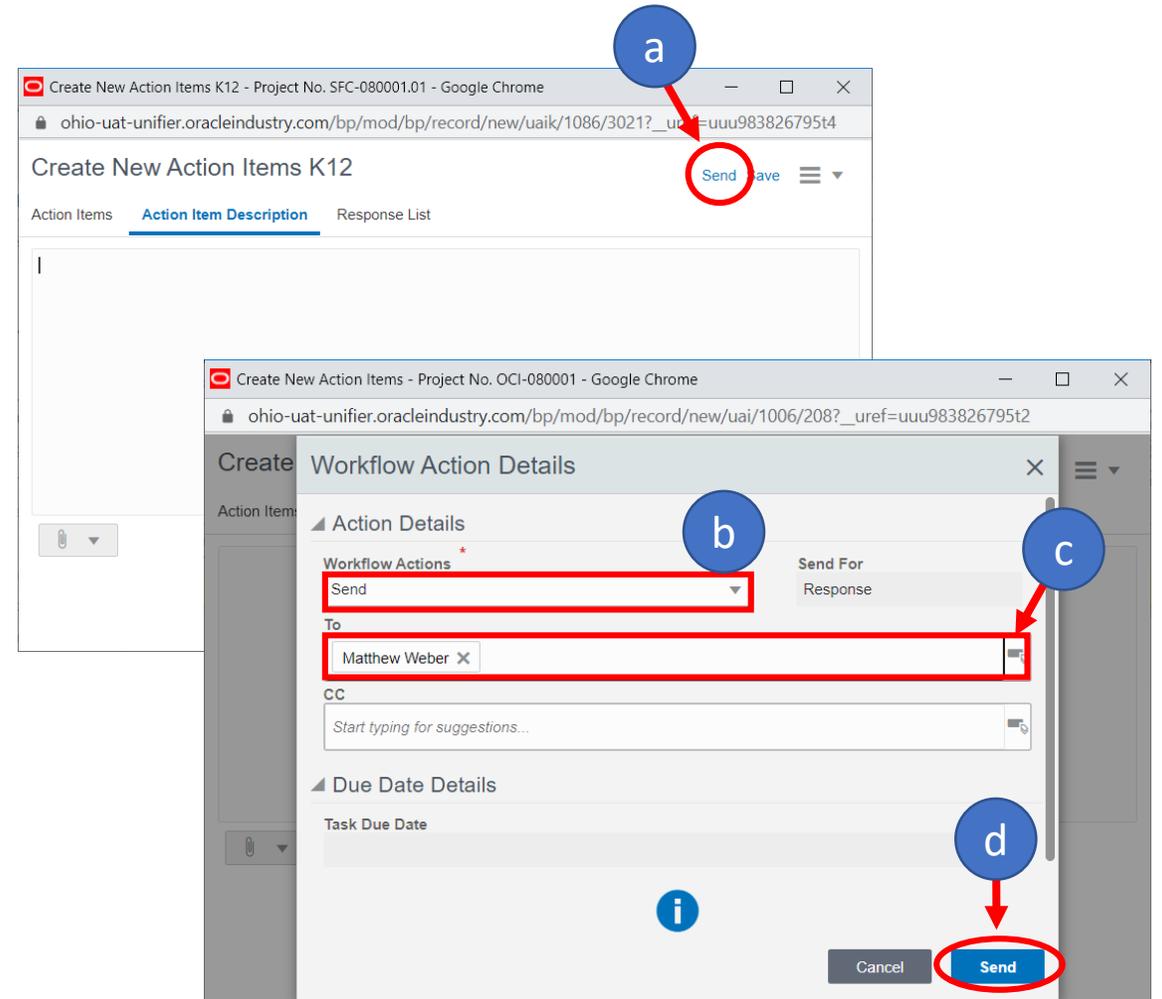
[Large empty text input area]

[Attachment icon]



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**



Next Step: Reviewing and Responding

- ▶ Click Accept Task to begin review and response

The screenshot shows a web browser window with the title "Action Items K12 - Test Action Item - Project No. SFC-080001.01 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/uai/37/0/0?srcid=37&model=uai&fromcostlog=1&project_id=1086&nfl=...". The page title is "Action Items K12". In the top right corner, there are two buttons: "Accept" (circled in red) and "Decline", followed by a menu icon. Below the title, there are two tabs: "Action Items" (selected) and "Response List". The main content area is divided into two sections: "Task Details" and "General".

Task Details

- From: Matthew Weber
- To: Matthew Weber
- Sent For: Response

General

Project Number	SFC-080001.01	Record Number	AI-0024
Project Name	Oak Hills Local Building Project	Creator	Matthew Weber
Organization Name		Creation Date	08/21/2020 10:28 AM (UTC-8)

On the right side of the page, there is a "Linked Records" section with a sub-tab "Linked Mail" and "Workflow Progi". Below this, there is an information icon and the text "Information No Linked Records."



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 displays three overlapping screenshots of the Oracle UAT interface, illustrating the steps to send 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 the 'Workflow Actions' dropdown menu open, highlighting 'Completed Send For Review' and labeled 'b'. The bottom screenshot shows the 'Workflow Action Details' dialog box with the 'To' field populated with 'Matthew Weber' and the 'Send' button circled in red and labeled 'd'. A 'Cancel' button is also visible next to the 'Send' button.



Next Step: Completing Action Item

- ▶ Click Accept Task to begin review and response

The screenshot displays the Oracle Action Items K12 interface. The browser title is "Action Items K12 - Test Action Item - Project No. SFC-080001.01 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/uai/37/0/0?srcid=37&model=uai&fromcostlog=1&project_id=1086&nfl=...". The page title is "Action Items K12". In the top right corner, there are two buttons: "Accept" (circled in red) and "Decline". Below the title, there are two tabs: "Action Items" (selected) and "Response List". The main content area is divided into two sections: "Task Details" and "General".

Task Details

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Organization Name		Creation Date	08/21/2020 10:28 AM (UTC-8)

On the right side of the interface, there is a "Linked Records" section with a sub-tab "Linked Mail". Below this, there is a message icon and the text "Information No Linked Records."



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, illustrating the steps to complete an action item. The browser window title is "Action Items - Test AI20201 - Project No. OCI-080001 - Google Chrome".

- Top Screenshot:** Shows the "Action Items" page. A blue circle labeled 'a' points to the "Send" button in the top right corner, which is circled in red.
- Middle Screenshot:** Shows a "Workflow Action Details" modal window. A blue circle labeled 'b' points to the "Workflow Actions" dropdown menu, which is highlighted with a red box. The dropdown menu is open, showing options: "Select", "Close", and "Return for Clarification".
- Bottom Screenshot:** Shows the "Workflow Action Details" modal window with "Close" selected in the "Workflow Actions" dropdown. A blue circle labeled 'c' points to the "Send" button at the bottom right, which is circled in red. The "Send For" field contains "End".



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211

