



Handling Tasks

System Upgrade, May 2017

Tasks– Location

- ▶ **Reminder:** Tasks are now located independently in the gray menu bar to the left.
- ▶ *Collaboration no longer exists*

The screenshot displays the Oracle Primavera Unifier web application interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle' with a 'Sign Out' link. Below this, a breadcrumb trail shows 'School Facilities' > 'OAKS CI District...' > 'Oak Hills Local ...' > 'OAKS CI Trainin...'. A left-hand navigation menu is visible, with the 'Tasks' item highlighted in a red box and pointed to by a red arrow. The main content area shows the 'OAKS CI Training 4 - Home' page, which includes a 'Summary' section and a 'Details' section. The 'Summary' section contains a table with the following data:

Items Requiring Your Attention	
Tasks:	164, New 154, Late 38
Notifications:	39 New
Draft Records:	11 New
uMails:	0 New

The 'Details' section at the bottom of the page shows the following information:

Project Number: OCI-090004
Project Name: OAKS CI Training 4

Tasks– View All

- ▶ The default task view is “Received in the last 7 days)
- ▶ To view All Tasks, change your view to “All Tasks”

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier'. Below this, there are tabs for 'School Facilities', 'Agency', and 'OAKS CI Trainin...'. The main content area is titled 'Tasks' and features a '+ Create' button, an 'Actions' dropdown, and a 'View' dropdown menu. The 'View' dropdown is currently set to 'Received in last 7 days' and is open, showing a list of options: 'Received in last 7 days', 'Received in last 30 days', 'Group by Business Process', 'Group by Origin', 'Late Tasks', 'Hidden Tasks', 'All Tasks', 'Create New View...', and 'Manage Views...'. The 'All Tasks' option is highlighted with a red box, and a red arrow points to it from the left. The left sidebar contains a navigation menu with items like 'OAKS CI Training 4 - H...', 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', and 'Reports'.

Task Preview

- ▶ When you click on a task and highlight it, you will see a preview of the record on the right hand side of your screen
- ▶ To minimize the preview, click the 3 dots to the left/middle of the preview screen

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. Below this, there are tabs for 'School Facilities', 'OAKS CI District...', 'Oak Hills Local ...', and 'OAKS CI Trainin...'. The left sidebar contains a navigation menu with items like 'OAKS CI Training 4 - H...', 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', and 'Reports'. The main area shows a 'Tasks' table with columns for 'Origin', 'Business Process', 'Record Number', 'Title', and 'Record Du...'. A red box labeled 'Click to Preview' has an arrow pointing to the first row of the table. To the right, a 'Record Details' pane is open, showing fields for 'General', 'Organization', 'Project Number', 'Project Name', 'Project Location', 'Assignee', 'Meeting Minute', 'Action', and 'Response'. A red box labeled 'Click to Collapse' has an arrow pointing to a three-dot menu icon in the 'Time' field of the 'Record Details' pane.

Origin	Business Process	Record Number	Title	Record Du...
OAKS CI Training 4	Action Items	AI-00164	test 1	05/01/2017
OAKS CI Training 4	Subcontractor/Su...	SSD-0142	Katie's Concrete	
OAKS CI Training 4	Contractor Pay Re...	CPR-0037	Stored Materials T...	
OAKS CI Training 4	Subcontractor/Su...	SSD-0143	PPH	
OAKS CI Training 4	Action Items	AI-00159	Katie Marie	04/19/2017
OAKS CI Training 4	Design Reviews	DR-0020		
OAKS CI Training 4	Action Items	AI-00157	katie	04/13/2017
OAKS CI Training 4	Design Reviews	DR-0019		
OAKS CI Training 4	Design Reviews	DR-0012		
OAKS CI Training 4	Design Reviews	DR-0013		
OAKS CI Training 4	Design Reviews	DR-0014		
OAKS CI Training 4	Design Reviews	DR-0015		
OAKS CI Training 4	Design Reviews	DR-0016		
OAKS CI Training 4	Design Reviews	DR-0017		
OAKS CI Training 4	Design Reviews	DR-0018		
OAKS CI Training 4	Professional Serv...	PSPR-0009	Project - Firm - Ap...	
OAKS CI Training 4	Professional Serv...	PSPR-0005	Katie's Consulting...	

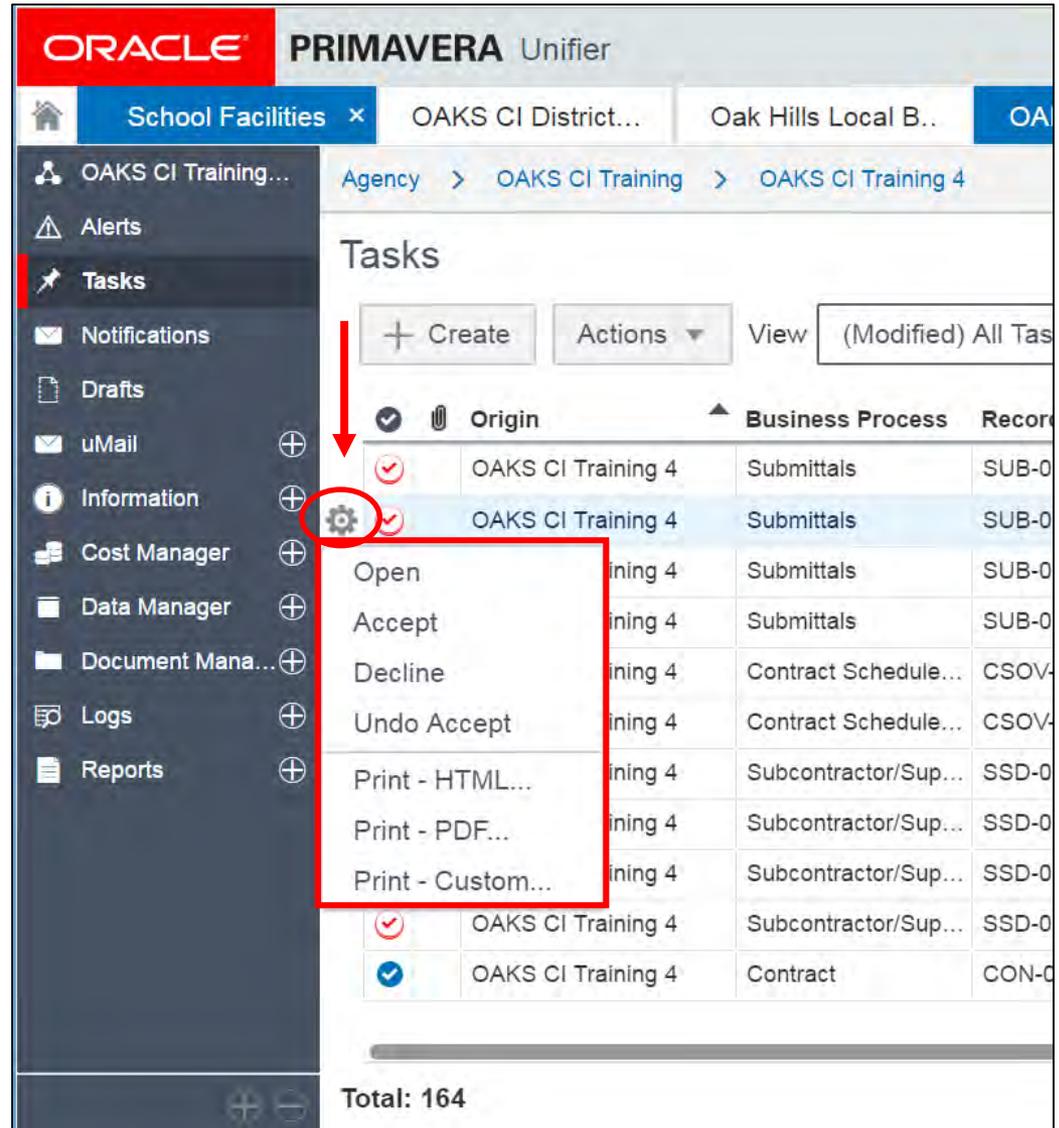
Accepting Tasks

▶ Use gear icon  to:

- ▶ Open Task
- ▶ Accept Task
- ▶ Undo Accept Task
- ▶ Print a copy of the record

▶ **NOTES:**

- ▶ Once you click **“Accept Task”** you are now responsible for completing this record **(even if you haven’t opened it)**
- ▶ If someone else should complete the record, click **“Undo Accept”**



The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'ORACLE' and 'PRIMAVERA Unifier'. The main content area is titled 'Tasks' and contains a table of task records. The left sidebar has a 'Tasks' menu item highlighted in red. A gear icon in the sidebar is circled in red, and a dropdown menu is open over it, listing actions: 'Open', 'Accept', 'Decline', 'Undo Accept', 'Print - HTML...', 'Print - PDF...', and 'Print - Custom...'. A red arrow points from the gear icon to the dropdown menu. The table below shows task records with columns for 'Origin', 'Business Process', and 'Record ID'. The total number of tasks is 164.

Origin	Business Process	Record ID
OAKS CI Training 4	Submittals	SUB-0
OAKS CI Training 4	Submittals	SUB-0
OAKS CI Training 4	Submittals	SUB-0
OAKS CI Training 4	Contract Schedule...	CSOV-
OAKS CI Training 4	Contract Schedule...	CSOV-
OAKS CI Training 4	Subcontractor/Sup...	SSD-0
OAKS CI Training 4	Subcontractor/Sup...	SSD-0
OAKS CI Training 4	Subcontractor/Sup...	SSD-0
OAKS CI Training 4	Subcontractor/Sup...	SSD-0
OAKS CI Training 4	Contract	CON-0

Accepting Tasks

▶ Also, you can use check boxes to to:

- ▶ Accept Task
- ▶ Undo Accept Task
- ▶ Accept Late Task
- ▶ Undo Accept Late Task



Warning

Once you click the Accept Task checkbox and complete work on the record, do not check the box again. This will undo your acceptance of the task and erase all work.

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'ORACLE' and 'PRIMAVERA Unifier'. Below it, there are tabs for 'School Facilities', 'OAKS CI District...', and 'Oak Hills'. The main content area is titled 'Tasks' and features a '+ Create' button and an 'Actions' dropdown menu. A table of tasks is displayed with columns for 'Origin' and 'Business Unit'. A red box highlights the 'Accept Task' checkbox column, which contains a mix of checked (red) and unchecked (blue) boxes. The tasks listed are all from 'OAKS CI Training 4'.

Accept Task	Origin	Business Unit
<input checked="" type="checkbox"/>	OAKS CI Training 4	Submi
<input checked="" type="checkbox"/>	OAKS CI Training 4	Submi
<input checked="" type="checkbox"/>	OAKS CI Training 4	Submi
<input checked="" type="checkbox"/>	OAKS CI Training 4	Submi
<input checked="" type="checkbox"/>	OAKS CI Training 4	Submi
<input checked="" type="checkbox"/>	OAKS CI Training 4	Contra
<input checked="" type="checkbox"/>	OAKS CI Training 4	Contra
<input checked="" type="checkbox"/>	OAKS CI Training 4	Subco
<input checked="" type="checkbox"/>	OAKS CI Training 4	Subco
<input checked="" type="checkbox"/>	OAKS CI Training 4	Subco
<input checked="" type="checkbox"/>	OAKS CI Training 4	Subco
<input checked="" type="checkbox"/>	OAKS CI Training 4	Subco
<input checked="" type="checkbox"/>	OAKS CI Training 4	Contra

Create a New Record *(in Tasks)*

- ▶ You can now create a new record in Tasks by clicking the “Create” button
- ▶ **NOTE:** You can also still create records from Logs

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar shows the user 'Katie Tuttle' and a 'Sign Out' option. The main content area is titled 'Tasks' and features a '+ Create' button highlighted with a red box and a red arrow. Below the button is a table of task records with the following columns: Origin, Business Process, Record Number, Title, and Record Due.

Origin	Business Process	Record Number	Title	Record Due
OAKS CI Training 4	Change Order	CO-0022	Test CO	
OAKS CI Training 4	Action Items	AI-00164	test 1	05/01/2017 09:14 ...
OAKS CI Training 4	Subcontractor/Sup...	SSD-0142	Katie's Concrete	
OAKS CI Training 4	Contractor Pay Re...	CPR-0037	Stored Materials T...	
OAKS CI Training 4	Subcontractor/Sup...	SSD-0143	PPH	
OAKS CI Training 4	Action Items	AI-00159	Katie Marie	04/19/2017 10:58 ...
OAKS CI Training 4	Design Reviews	DR-0020		

Total: 165

Choose Record Type, Create

- ▶ Select the Business Process (**Record Type**) you wish to create from the dropdown menu
- ▶ Select Workflow if applicable
- ▶ Click Create

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', the user name 'Katie Tuttle', and a 'Sign Out' button. Below the navigation bar, there are tabs for 'School Facilities', 'OAKS CI District...', 'Oak Hills Local B..', and 'OAKS CI Trainin...'. The left sidebar contains a list of navigation items: 'OAKS CI Training 4 - H...', 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', and 'Reports'. The main content area displays a 'Tasks' list with the following items: '72 Hour Notice', 'Action Items', 'Advertisements', 'Budget - Initial', 'Budget - Revisions', 'Change Order', and 'Closeout - Contractor'. A 'New Record' dialog box is overlaid on the 'Action Items' task. The dialog has a title bar 'New Record' and a close button 'x'. It contains three dropdown menus: 'Select Business Process Origin' (set to 'OAKS CI Training 4'), 'Select Business Process *' (set to '-Select-'), and 'Workflow' (set to 'Action Items'). At the bottom of the dialog are 'Cancel' and 'Create' buttons. A red box highlights the entire dialog, and a red arrow points to the 'Action Items' option in the task list.

This is a close-up view of the 'New Record' dialog box. The 'Select Business Process Origin' dropdown is set to 'OAKS CI Training 4'. The 'Select Business Process *' dropdown is set to 'Action Items'. The 'Workflow' dropdown is also set to 'Action Items'. At the bottom right, the 'Create' button is highlighted with a red circle, and a red arrow points to it from the right side of the image.

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211