

# ACTION ITEMS

Oracle Unifier Business Process User Guide

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# 1. Business Process Overview

Shell Level	Organization, Business Unit, Type, Sub Type, Project	
Workflow	Yes	
Connected BPs	Risks Activity Sheet Request for Information	Daily Log Meeting Minutes Records of Decisions Issues
Partner Access	Yes	

## 1.1 Understanding Action Items

Action Items are tasks requiring a formal, documented record of steps taken to achieve a specific goal. They can significantly impact various project objectives, including scope, schedule, cost, resources, and quality. Anyone on the project team, whether in the office or the field, can identify the need for an action item. However, the Project Manager is responsible for reviewing all requested actions related to their projects and ensuring timely execution.

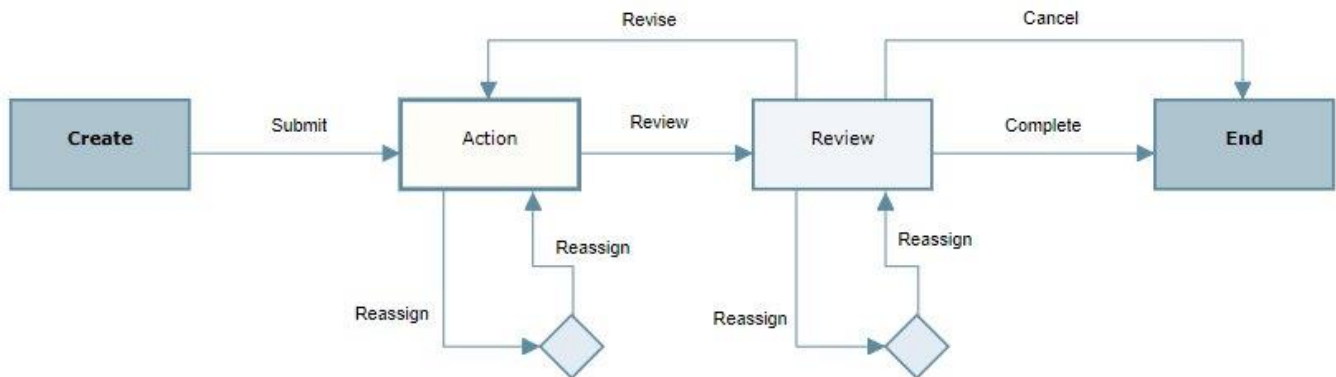
### Examples of Action Items:

- **Conduct a Soil Test:** Schedule and conduct a soil test to determine the ground's load-bearing capacity before foundation work begins.
- **Approve Final Materials List:** Review and approve the final list of materials required for the construction phase, ensuring all items meet project specifications.

## 1.2 User Groups & Permissions

Role	Permissions	Shell Level
All Project Users	Authorized to create, review, and revise records, as well as receive notifications.	Project Level Shell
All Company Users	Authorized to create, review, and revise records, as well as receive notifications.	Higher Level Shells
Partner Contractors	Can edit the record. Receives notifications of tasks to take steps necessary to complete the action	Project Level Shell
Partner Vendors	Can edit the record. Receives notifications of tasks to take steps necessary to complete the action	Project Level Shell

## 1.3 Business Process Flow



Workflow Step	Summary
<b>Create</b>	The process begins with the Initiator creating the Action Item record. During this step, the Initiator can also add any relevant details or context in the "Additional Notes" section, ensuring that all necessary information is captured from the start.
<b>Action</b>	The Person Responsible then reviews the Action Item and decides what needs to happen next. They may choose to take action themselves, reassign the task to someone else better suited for it, or proceed with reviewing the steps taken so far.
<b>Review</b>	In the Review step, the Person Responsible carefully examines the progress made on the Action Item. At this stage, they can either approve the completion of the task or decide to cancel it if it's no longer necessary. They may also return it for further action if more work is needed.
<b>Complete</b>	Once all necessary actions are taken and the review is finalized, the Action Item is marked as complete. At this point, the record is finalized and can no longer be edited, except for certain query tabs. A PDF version of the completed Action Item is automatically saved in the Document Manager for future reference.



## 1.4 Action Items Form Explained

This form is divided into several blocks, containing mandatory and optional fields, as well as line items. Understanding these elements is crucial for accurately completing the form.

The diagram illustrates the structure of the Action Items form. It is divided into several blocks, each containing specific fields. The blocks are: General, Description, P6 Activity Details, Action Item Origin Information, and Record Information. The P6 Activity Details block is further divided into P6 Activity, P6 Planned Start, and P6 Planned Finish. The form is also divided into sections: Action Item, Additional Notes, Risks, and Issues. The form is labeled 'Line Item Details' and 'Form Fields'.

Line Item Details

Action Items

Action Item Additional Notes Risks Issues

> General

> Description

Description

Resolve the issue with the project management software integration. The software is not syncing correctly with the project timelines, causing delays in updates.

✓ P6 Activity Details

P6 Activity P6 Planned Start P6 Planned Finish

> Action Item Origin Information

> Record Information

Form Blocks

Form Fields

### 1.4.1 Upper Form

The upper part of the form is divided into four blocks, each consisting of rows of input fields. These blocks are designed to organize the information efficiently.

- **General:** The General block captures the essential information needed to create and manage an Action Item. It includes key details that help identify, prioritize, and track the item, ensuring that it is correctly assigned and monitored throughout its lifecycle.
- **Description:** The Description block provides a space to clearly outline the specifics of the Action Item. This includes the context, purpose, and any pertinent details that explain what needs to be done, where, and why, helping all stakeholders understand the task at hand.
- **P6 Activity Details:** The P6 Activity Details block links the Action Item to specific activities within the project's schedule. This ensures that the Action Item is connected to the broader project timeline, allowing for better tracking and coordination with other scheduled tasks.
- **Action Items Origin Information:** The Action Item Origin Information block captures the source of the Action Item, linking it to other related business processes or records. This provides context and traceability, ensuring that the Action Item is understood about its origin and any preceding discussions or decisions.
- **Record Information:** This block provides additional organizational and project-specific information, linking the project to its broader organizational context. It includes details about the organization, business unit, and program, facilitating better alignment and tracking within the organization.

### 1.4.2 Form Fields

The fields in these blocks behave according to their data elements:

- **Editable Fields:** These can be filled in or modified by the user.
- **Read-Only Fields:** These are automatically filled and cannot be changed by the user.
- **Record Number:** Automatically generated by the system.



- **Title:** A required input that must be provided by the user.

While optional fields are present in the form, this guide focuses on the mandatory fields required for form creation. Optional fields may include additional details like secondary objectives, detailed cost breakdowns, and stakeholder information, which can be filled in based on organizational needs (Reference [BU Portal](#) relevant to your organization).

### 1.4.3 Line Item Details

A line item is a detailed entry within a business process (BP) form, such as transactions or documents, that can be individually edited or deleted if the form is still editable.

- **Additional Notes (Line Item):** The Additional Notes section provides a flexible space for users to include any extra information, context, or observations that may not fit neatly into the structured fields of the Action Item form. It is intended to capture supplementary details that can assist in the understanding, tracking, or resolution of the Action Item. This area is particularly useful for documenting any nuances, clarifications, or ongoing updates that are relevant to the Action Item but are not captured elsewhere in the form.

## 2. Step-by-Step Instructions

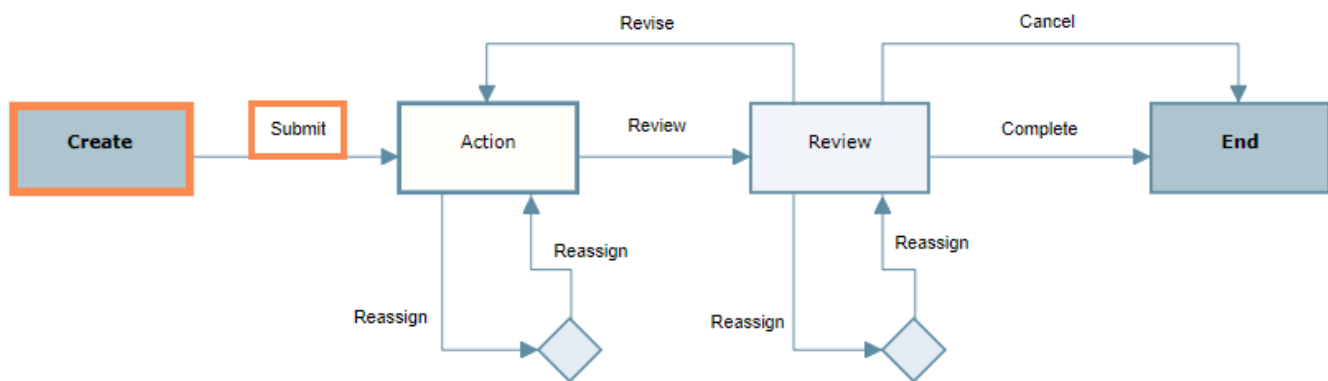
### 2.1 Create Action Items Record

#### User Roles

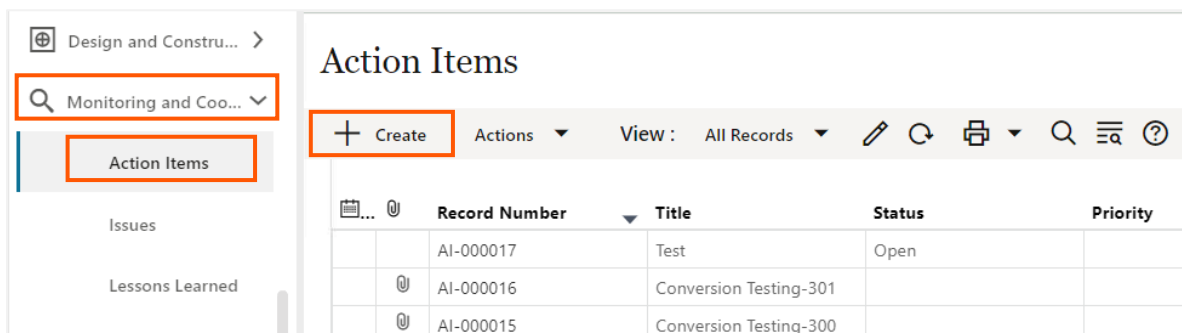
All Project Users & All Company Users

#### Workflow Step Summary

The process begins with the Initiator creating the Action Item record. During this step, the Initiator can also add any relevant details or context in the "Additional Notes" section, ensuring that all necessary information is captured from the start.



1. In the left Navigator, click **Monitoring and Coordination > Action Items**
2. Click **+ Create**.



3. In the **General** section of the **Create Action Items** window, enter text in the required fields: Title and Target Completion Date
  - i. **Title:** Provide a brief, descriptive title summarizing the action item (*50 characters or less*).
  - ii. **Target Completion Date:** Enter the expected date by which the action item should be completed.
  - iii. **Assignee:** This field is used to designate the individual or group responsible for completing a specific action item. When creating or managing action items, user can select an assignee from a list of users or groups configured within the system. The assignee will receive notifications and updates related to the task, ensuring accountability and facilitating efficient workflow management.



- iv. **Description:** As needed, provide detailed information about the Action Item record.

## Create New Action Items

**General**

Record No.

Status

Title \*

Priority

Target Completion Date \*

Originator

Creation Date

Record Last Update Date

**Description**

Action Item Type

Assignee \*

Description \*

4. Navigate to the **Additional Notes** tab and select **Add**.

**Additional Notes Line-Item Details:** This tab allows users to provide any extra information, background details, or context that may help in understanding or completing the action item.

**Create New Action Items**

Action Item **Additional Notes**

**Add** Actions

No. Notes

5. In the General section of the Additional Notes Line-Item Details, complete the following field.
- i. **Notes:** Include any additional relevant details or context about the action item.





Action Item Additional Notes

The screenshot shows the 'Create New Action Items' form. The 'Additional Notes' tab is selected. Below the tabs, there is a table with columns 'No.', 'Actions', and 'Notes'. The 'Notes' column is highlighted with an orange border. To the right of the table, there is a 'Notes' section with a text area for entering notes.

6. Click **Save** to save the current line item. This will ensure all entered information is recorded and stored.
  - a. **Save & Add New:** Click this button to save the current action item and immediately start adding a new one. This is useful for quickly entering multiple action items.
7. Once all mandatory and optional fields for the **New Action Items** are complete, click **Send** at the top right of the form.
  - a. The **Workflow Actions Details** pop-up window will display.
  - b. You can also click **Save Draft** to revisit later.

The screenshot shows the 'Create New Action Items' form. The 'Send' button is highlighted with an orange border. The form includes fields for 'Record No.', 'Status', and 'Attachments'. The 'Send' button is located at the top right of the form.

8. Verify **Submit** as the Workflow Action.
9. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) who is responsible for acting on the submitted record (i.e., **Responsible Person**)
  - a. The assignees can be searched using the Select function.
10. Click **Send**.

The screenshot shows the 'Create New Action Items' form with the 'Workflow Action Details' pop-up window open. The 'Submit' action is selected in the 'Workflow Actions' dropdown. The 'To' field is highlighted with an orange border. The 'To' field contains the text 'Start typing for suggestions...'. The 'CC' field also contains the text 'Start typing for suggestions...'. The 'Send' button is highlighted with an orange border.



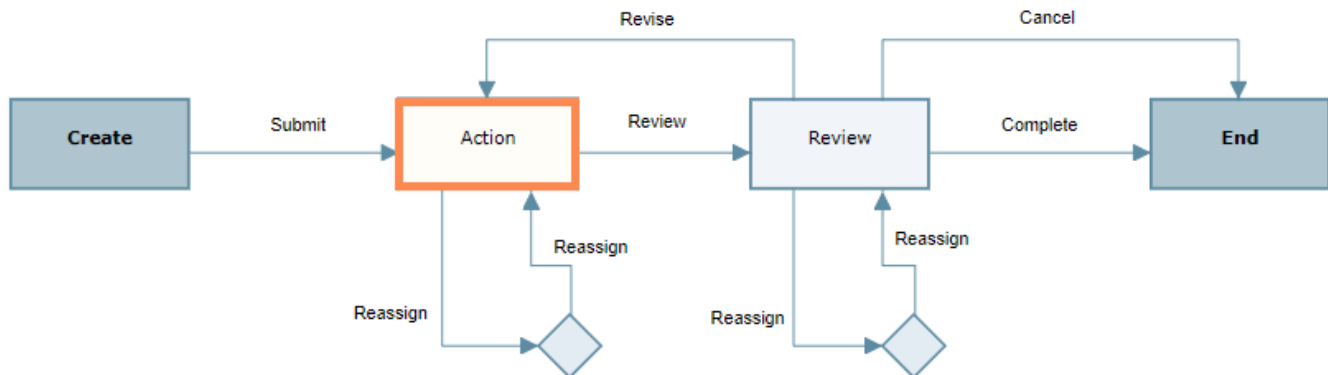
## 2.2 Act on Action Items Record

### User Roles

All Project Users, All Company Users, Partner Contractors & Partner Vendors

### Workflow Step Summary

The Person Responsible then reviews the Action Item and decides what needs to happen next. They may choose to take action themselves, reassign the task to someone else better suited for it, or proceed with reviewing the steps taken so far.



1. Click the Tasks option in the **Navigator**.
  - a. The **Task Log** will show available records.
2. Double-click the Action Items BP with **Sent For** set to 'Action'.
  - a. This will open the Action Items pop-up window.

Tasks								
+ Create   Actions   View: All Tasks   [Edit] [Refresh] [Print] [Search] [Filter]								
✓ @	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
✓	Project_Demo_TSS	Action Items	AI-000039	test		Soumitra Mandal ...	Action	
✓	Project_Demo_TSS	Action Items	AI-000037	Action Item 5/3		Soumitra Mandal ...	Review	
✓	Project_Demo_TSS	Issues	ISS-000009	test	07/21/2024 09:10 ...	Soumitra Mandal ...	Monitor	
✓	Project_Demo_TSS	Change Order	CO-00044	R83	06/14/2024 05:00 ...	Srihariprasath Bhar...	Review & Coordination	
✓	Project_Demo_TSS	Change Order	CO-00036	Test		Hariharanath Mag...	Level 1 Review	
✓	Project_Demo_TSS	Change Order	CO-00035	test		Hariharanath Mag...	Level 1 Review	

3. Click **Accept**. Note: the action can be reassigned to someone else in a later step.

## Action Items

**4.** The page will refresh and show options to **Send**.

## Action Items

**5.** Review the details and in case the Action Item needs to be reassigned to another user then it can be noted in the **Final Resolution** field, then click **Send**:

## Action Items

6. Select either **Review** or **Reassign** under the **Workflow Actions** dropdown.
  - a. In the To field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to.



- b. The assignees can be searched using the Select function.

The screenshot displays the 'Action Items' interface. On the left, a form for creating an action item is visible, with fields for Title (test), Target Completion Date (07/01/2024 05:00 PM), Creator (Soumitra Mandal - All Project User), and Project Manager (Company Administrator). A 'Description' section is also present. In the center, a 'Workflow Action Details' pop-up window is open, showing a 'Select' dropdown menu for 'Workflow Actions' with options: Select, Review, and Reassign. The background interface includes tabs for 'Action Item', 'Additional Notes', 'Risks', and 'Issues', and buttons for 'Save Draft', 'More Actions', and 'Send'.

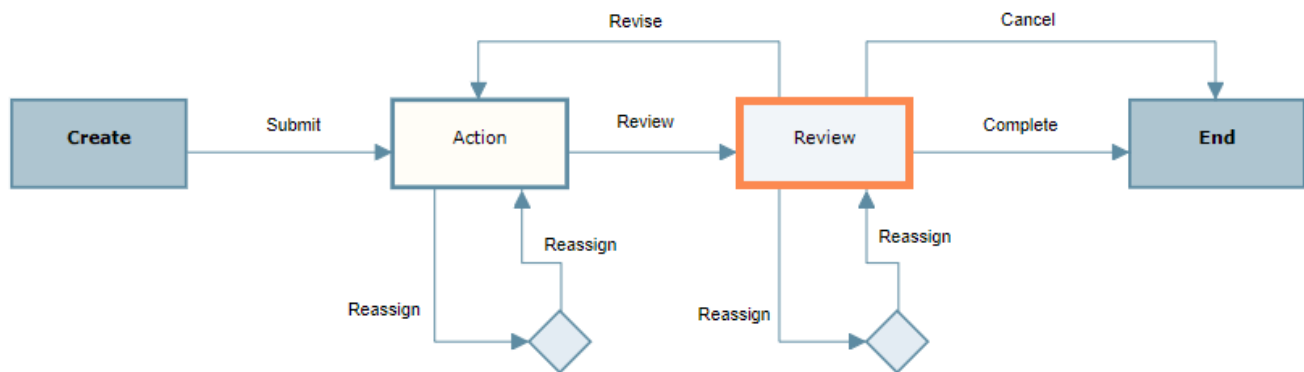
## 2.3 Review Action Items Record

### User Roles

All Project Users and All Company Users

### Workflow Step Summary

In the Review step, the Person Responsible carefully examines the progress made on the Action Item. At this stage, they can either approve the completion of the task or decide to cancel it if it's no longer necessary. They may also return it for further action if more work is needed.



1. Click the Tasks option in the Navigator
  - a. The **Task Log** will show available records.
2. Double-click the Action Items BP with **Sent For** set to '**Review.**'
  - a. This will open the Action Items pop-up window.



Southern Company > TSS > Southern Power Company > Project_Demo_TSS								
Tasks								
+ Create   Actions   View: All Tasks   [Edit] [Refresh] [Print] [Search] [Filter]								
<input checked="" type="checkbox"/> @	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
<input checked="" type="checkbox"/> @	Project_Demo_TSS	Action Items	AI-000027	Action Item 5/3		Rashmi Singh-Proj...	Review	
<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00044	R83	06/14/2024 05:00 ...	Srihariprasath Bhar...	Review & Coordin...	
<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00036	Test		Hariharanath Mag...	Level 1 Review	

### 3. Click **Accept**.

- The page will refresh and show options to Send or Save.

Action Items

Decline   More Actions   **Accept**

Action Item   Additional Notes   Risks   Issues

Task Details

From  
Rashmi Singh-Project Manager  
To

Attachments @   Comments   Linked Records   Workflow P > [Full Screen]

Name

Published Attachments

☒ Dummy File.pptx

### 4. As part of the review step, the reviewer may also complete the following actions:

- Add Reviewer Notes/Comments:** Reviewer can add notes/comments in the “Reviewer Notes/Comments” field

Action Items

Save Draft

Action Item   Additional Notes   Risks   Issues

Reviewer Notes/Comments

P6 Activity Details

P6 Activity

P6 Planned Start

P6 Planned Finish

Attachments   Comments

[Paperclip Icon]

- Attachments:** Attach files to be routed with the form. These attachments may be supporting documents and can also be attached to a comment by clicking on the paperclip icon.
- Post Comments:** Add text comments, which are notes that accompany the Actions Items record but do not become part of it. This field can be used to **provide clarification or document revisions made to the form**.
- Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.
- Create a Risk record:** Create a risk record for new risks opened from the Action Items BP. (For more information, reference the Risks User Guide).
- Create an Issues Record:** Create an Issues record to list the current project concerns that are actively impacting progress. (For more information, reference the Issues User Guide).



**Action Items** Decline More Actions Accept

Action Item Additional Notes **Risks** Issues

**Task Details**

From  
Rashmi Singh-Project Manager

To

**Attachments** Comments Linked Records Workflow P

Name	Title
Published Attachments	
Dummy File.pptx	

5. Click **Send**.
  - a. The **Workflow Actions Details** pop-up window will display.
6. Click the dropdown arrow in the **Workflow Actions** field.
7. Select the appropriate option from the dropdown.

**Action Items** Save Draft More Actions Send

Action Item Additional Notes Risks Issues

**General**

Record No  
AI-000040

Title  
test456

Target Completion Date  
07/04/2024 05:00 PM

Creator  
Soumitra Mandal - All Project User

Project Manager  
Ganesh Administrator

**Workflow Action Details**

**Action Details**

Workflow Actions \* Send For

Select Required

Select  
Reassign  
Revise  
Complete  
Cancel

Cancel Send

i  
Information

**Note:** Users can **Reassign** the record if they are the wrong person to review the Action Item.

8. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to.
  - a. The assignees can be searched using the **Select** function
9. Click **Send**.

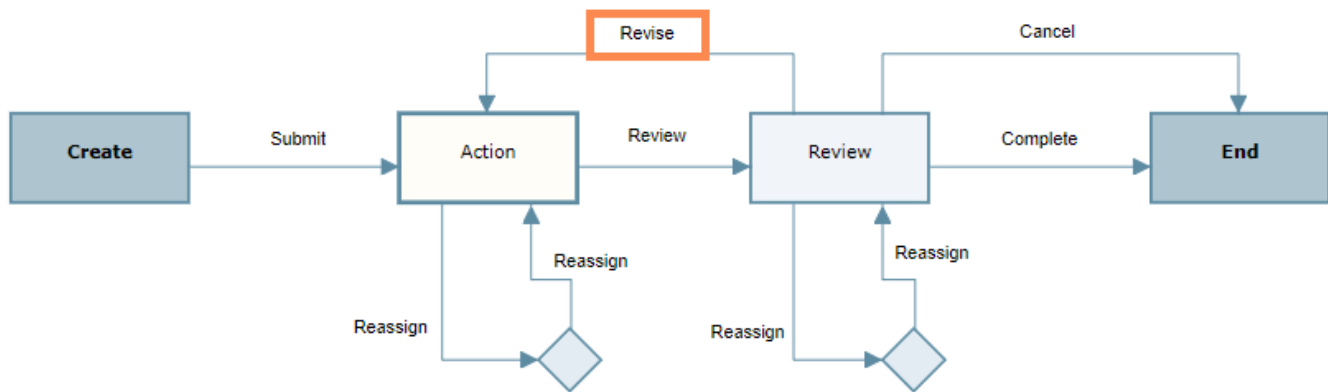
## 2.4 Revise Action Items Record

### User Roles

Preassigned Person Responsible

### Workflow Step Summary

During the Revise step, the Person Responsible or Reviewer identifies that the Action Item requires additional work or clarification before it can be completed. The record is then sent back for revisions, where the necessary updates or corrections are made. This step ensures that all details are accurate and complete before moving forward. Once the revisions are made, the Action Item can be resubmitted for review.



1. Click the Tasks option in the **Navigator**.
  - a. The **Task Log** will show available records.
2. Double-click the Action Items BP with **Sent For** set to 'Action.'
  - a. This will open the Action Items record window.

	Origin	Business Process	Record Number	Title	Sent for
<input checked="" type="checkbox"/>	Unifier Showcase Sprint 1	Action Items	AI-000100	Test	Action
<input checked="" type="checkbox"/>	Unifier Showcase Sprint 1	Nonconformance Report	NCR-000044	Test	Verification

3. Click **Accept**.
  - a. The page will refresh and show options to **Send** or **Save**.

Action Items

Decline More Actions **Accept**

Action Item Additional Notes Risks Issues

**Task Details**

From  
Company Administrator

Attachments Comments Linked Records Work



4. As part of the Revise step, the person responsible may also complete the following actions:
- Attach Documents:** Attach files to be routed with the form. These attachments may be supporting documents and can also be included in the Comments section.
  - Post Comments:** Add text comments that are like notes that accompany the Action Items record but do not become part of it. This field can be used to **detail the revisions or clarification needed**.
  - Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.
  - Create a Risks Record:** Create a Risks Record to formally document the detailed description of risks.
  - Create an Issues Record:** Create an Issues record to formally document current project concerns that are actively impacting progress.

Action Items

Decline More Actions Accept

Action Item Additional Notes Risks Issues

Task Details

From

Rashmi Singh-Project Manager

To

Attachments Comments Linked Records Workflow P

Name	Title
Published Attachments	
Dummy File.pptx	

5. Click **Send**.
- The **Workflow Actions Details** pop-up window will display.
6. Click the dropdown arrow in the **Workflow Actions** field.
7. Click **Review**.

Action Items

Save Draft More Actions Send

Action Item Additional Notes Risks Is

General

Record No

AI-000040

Title

test456

Target Completion Date

07/04/2024 05:00 PM

Creator

Workflow Action Details

Action Details

Workflow Actions \*

Select

Review

Reassign

Send For

Required

8. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to.
- The assignees can be searched using the **Select** function
9. Click **Send**.



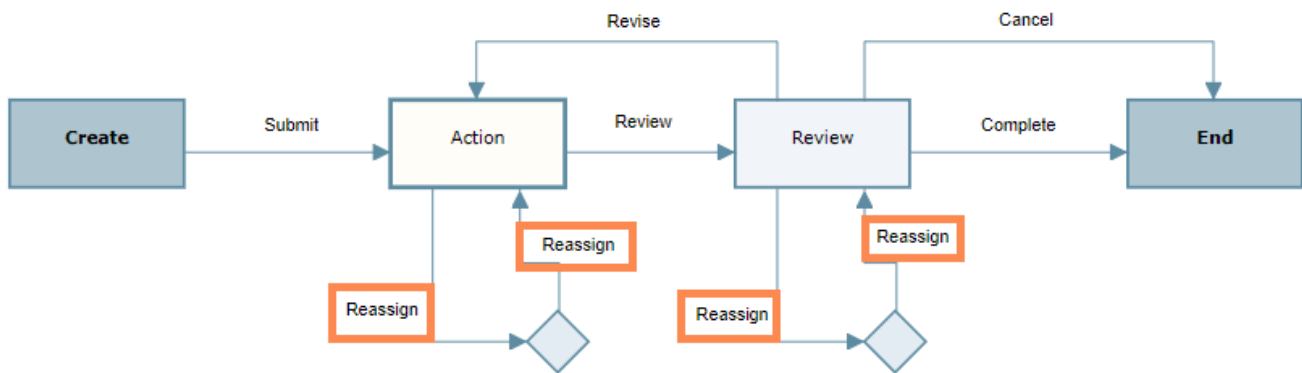
## 2.5 Reassign an Action Items Record

### User Roles

All Project User & All Company User

### Workflow Step Summary

If at any point during the workflow the Person Responsible determines that they are not the right person to handle the Action Item, or if someone else is better suited to address it, they can reassign the task. The Reassign step allows the Action Item to be redirected to the appropriate individual or team, ensuring that the task is handled by the most qualified person. The new assignee will then take over the responsibility for the Action Item.



- Click the Tasks option in the **Navigator**.
  - The **Task Log** will show available records.
- Double-click the Action Items BP with **Sent For** set to 'Review.'
  - This will open the Action Items pop-up window.

Southern Company > TSS > Southern Power Company > Project_Demo_TSS								
Tasks								
+ Create Actions View: All Tasks								
Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	
Project_Demo_TSS	Action Items	AI-000027	Action Item 5/3		Rashmi Singh-Proj...	Review		
Project_Demo_TSS	Change Order	CO-00044	R83	06/14/2024 05:00 ...	Srihaniprasath Bhar...	Review & Coordin...		
Project_Demo_TSS	Change Order	CO-00036	Test		Hariharanath Mag...	Level 1 Review		

- Click **Accept**.
  - The page will refresh and show options to Send or Save.

Action Items

Decline

More Actions

Accept

Action Item

Additional Notes

Risks

Issues

Task Details

From

Rashmi Singh-Project Manager

To

Attachments

Comments

Linked Records


Workflow P

Published Attachments

Dummy File.pptx

- Click **Send**.
  - The **Workflow Actions Details** pop-up window will display.
- Click the dropdown arrow in the **Workflow Actions** field.
- Click **Reassign**.

7. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.

- b. The assignees can be searched using the **Select** function  .
8. Click **Send**.
  - c. The window will close and revert to the Task page.

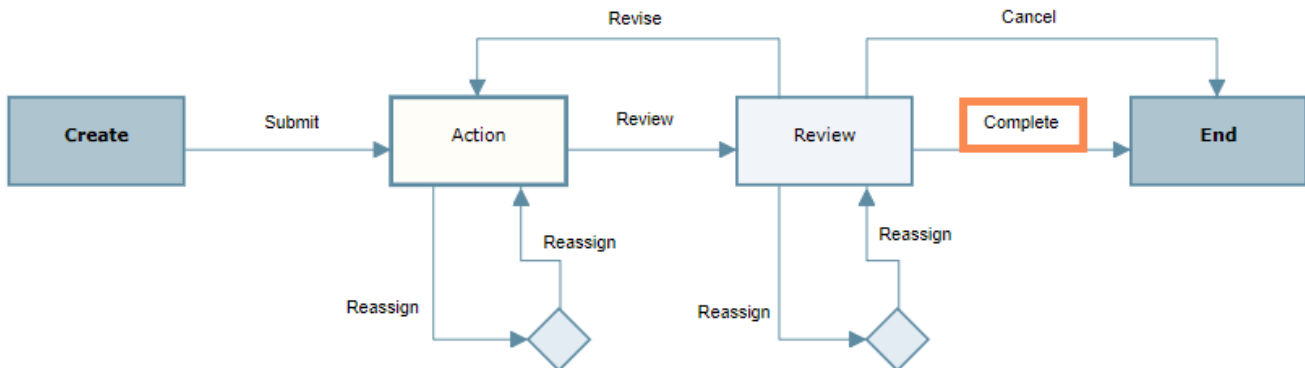
## 2.6 Complete Action Items Record

### User Roles

All Project User & All Company User

### Workflow Step Summary

Once all necessary actions are taken and the review is finalized, the Action Item is marked as complete. At this point, the record is finalized and can no longer be edited, except for certain query tabs. A PDF version of the completed Action Item is automatically saved in the Document Manager for future reference.



1. Click the Tasks option in the **Navigator**.
  - a. The **Task Log** will show available records.
2. Double-click the Action Items BP with **Sent For** set to '**Review**.'
  - a. This will open the Actions Items pop-up window.



Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
Project_Demo_TSS	Action Items	AI-000027	Action Item 5/3		Rashmi Singh-Proj...	Review	
Project_Demo_TSS	Change Order	CO-00044	R83	06/14/2024 05:00 ...	Srihariprasath Bhar...	Review & Coordin...	
Project_Demo_TSS	Change Order	CO-00036	Test		Hariharanath Mag...	Level 1 Review	

3. Click **Accept**.
  - a. The page will refresh and show options to Send or Save.

Action Items

Decline More Actions **Accept**

Action Item Additional Notes Risks Issues

**Task Details**

From  
Rashmi Singh-Project Manager

To

Attachments @ Comments Linked Records Workflow P >

Published Attachments

Dummy File.pptx

4. Click **Send**.
  - a. The **Workflow Actions Details** pop-up window will display.
5. Click the dropdown arrow in the **Workflow Actions** field.
6. Click **Complete**.

Action Items

Action Item Additional Notes Risks Issues

**General**

Record No  
AI-000027

Title  
Action Item 5/3

Target Completion Date  
05/03/2024 03:00 PM

**Workflow Action Details**

Workflow Actions \* Send For

Select

Select

Reassign

Revise

**Complete**


Cancel

Save Draft More Actions Send

Comments Linked Records Workflow P >

Published Attachments

Dummy File.pptx

7. In the **CC** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to receive a notification.
  - d. The assignees can be located using the **Select** function .
8. Click **Send**.

## 2.7 Cancel Action Items Record

### User Roles

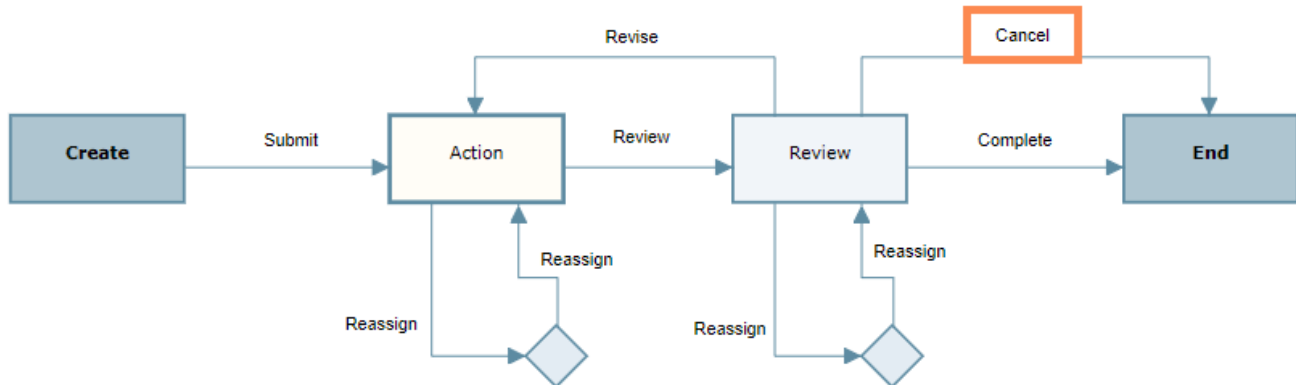
All Project User & All Company User

### Workflow Step Summary

The Cancel step is used when it is determined that the Action Item is no longer needed or relevant. This could happen if the task has become obsolete, the issue has been resolved through other means, or if the project scope has changed. When an Action Item is canceled, it is effectively closed and no further action



will be taken. The record is archived, and a PDF is generated for documentation purposes, but no additional edits can be made to the Action Item. This step ensures that unnecessary tasks do not linger in the workflow.



1. Click the Tasks option in the **Navigator**.
  - a. The **Task Log** will show available records.
2. Double-click the Action Items BP with **Sent For** set to 'Review.'
  - a. This will open the Action Items pop-up window.

	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
<input checked="" type="checkbox"/>	Project_Demo_TSS	Action Items	AI-000027	Action Item 5/3		Rashmi Singh-Proj...	Review	
<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00044	R83	06/14/2024 05:00 ...	Srihariprasath Bhar...	Review & Coordin...	
<input checked="" type="checkbox"/>	Project_Demo_TSS	Change Order	CO-00036	Test		Hariharanath Mag...	Level 1 Review	

3. Click **Accept**.
  - a. The page will refresh and show options to Send or Save.

Action Items

Decline More Actions **Accept**

Action Item Additional Notes Risks Issues

**Task Details**

From  
Rashmi Singh-Project Manager


To

Attachments

Name	Title
Dummy File.pptx	

4. Click **Send**.
  - a. The **Workflow Actions Details** pop-up window will display.
5. Click the dropdown arrow in the **Workflow Actions** field.
6. Click **Cancel**.



7. In the **CC** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to receive a notification.
  - d. The assignees can be located using the **Select** function  .
8. Click **Send**.
  - The window will close and revert to the Task page and the record has reached its terminal end.



## 2.8 Related Business Processes

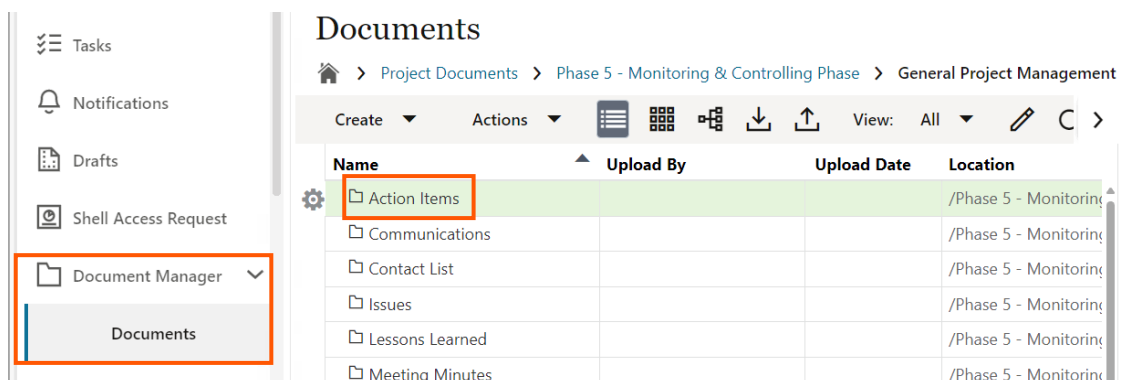
The Action Items BP is connected or linked to the following business processes in Unifier.

Workflow Step	Summary
Risks	Action Items can create and link risks directly within the Risks BP, ensuring that any new or associated risks are formally documented and managed.
Record of Decisions	Decisions recorded in the Decisions BP can trigger the creation of Action Items, ensuring that decisions are followed by concrete actions.
Request for Information	Action Items can originate from RFIs, linking the RFI to relevant tasks and ensuring that any follow-up actions are tracked.
Daily Log	Action Items can be created from Daily Logs, capturing any actions noted during daily activities and ensuring they are formally documented and followed up.
Meeting Minutes	Action Items can be generated directly from Meeting Minutes, linking the minutes to tasks that need to be addressed based on meeting discussions.
Issues	Action Items can originate from Issues BP, linking issues to specific tasks or follow-up actions, thereby ensuring that issues are resolved in a structured manner.

## 2.9 Action Items & Document Manager

This business process is designed to automatically publish its records, along with comments and attachments, to the Document Manager at the **project shell only**. This produces a detailed audit trail of the record information through the business process (*for both workflow and non-workflow processes*). Users can open these records and their information by following the steps below.

1. In the left **Navigator**, click **Document Manager**
2. Click **Documents**
3. In the central pane, navigate to the following folder:
  - a. **Phase 5 - Monitoring & Controlling Phase > General Project Management > Action Items**





4. The format for the generated .pdf workflow document is shown below. The “WF” is the BP workflow name, the “Record Number” is the Unifier-generated record number, and the “Record Title” is the title of the workflow record.

WF\_Record Number\_Record Title

## Documents

🏠 > Project Documents > Phase 5 - Monitoring & Controlling Phase > Action Items

Create ▾ Actions ▾ [Icons] View: All ▾ [Icons]

Name	Upload By	Upload Date	Location	BP	Document URL
📎 Action Items_AI-000005_AI-0...	Company Administrator	03/06/2024 04:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000006_AI-0...	Company Administrator	12/11/2023 01:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000008_Acti...	Rashmi Singh-Project M...	12/12/2023 03:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000009_Test...	Company Administrator	12/14/2023 06:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000014_Testi...	Company Administrator	01/10/2024 12:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000026_ert...	Company Administrator	01/17/2024 11:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>

Any files that are attached to the workflow will include the **paper clip icon** in the “BP” column. If a file was uploaded directly to the Document Manager folder, there will not be a paper clip icon in the “BP” column.

## Documents

🏠 > Project Documents > Phase 5 - Monitoring & Controlling Phase > Action Items

Create ▾ Actions ▾ [Icons] View: All ▾ [Icons]

Name	Upload By	Upload Date	Location	BP	Document URL
📎 Action Items_AI-000005_AI-0...	Company Administrator	03/06/2024 04:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000006_AI-0...	Company Administrator	12/11/2023 01:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000008_Acti...	Rashmi Singh-Project M...	12/12/2023 03:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000009_Test...	Company Administrator	12/14/2023 06:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>

Sort the list of files at any level within the Document Manager folders by clicking on the column label. An indicator will be displayed on the right side of the sorted column. Re-clicking on a sorted column will re-sort the list in the opposite sort order (i.e., ascending to descending or descending to ascending).

## Documents

🏠 > Project Documents > Phase 5 - Monitoring & Controlling Phase > Action Items

Create ▾ Actions ▾ [Icons] View: (Modified) All ▾ [Icons]

Name	Upload By	Upload Date	Location	BP	Document URL
📎 Action Items_AI-000050_Test...		/08/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000008_Acti...		/12/2023 03:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000006_AI-0...		/11/2023 01:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
📎 Action Items_AI-000014_Testi...		/10/2024 12:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>
AI-000080.pdf		/12/2024 03:...	/Phase 5 - Monitoring & Controlling Phase...	📎	<a href="https://dv-unifier.southernco.com/unifier/link/d">https://dv-unifier.southernco.com/unifier/link/d</a>

Columns ▾

Sort Ascending  
Sort Descending







## 3. Business Unit Guidance

This user guide offers baseline instructions. For localized guidance, users should visit their respective business unit portals (accessible via the link below).

[EPPM Training Homepage](#)

## 4. Appendix

### 4.1 Getting Help & Support

If you encounter any issues or require assistance, there are two primary channels available:

Business Unit Administrator	IT Support
For process-related inquiries or issues, users can reach out to the designated Business Unit Administrator. They are equipped to provide guidance and support specific to the business process within Oracle Unifier.	For technical issues or challenges beyond the scope of the Business Unit Administrator's expertise, users can contact IT Support. They can assist with platform-related technical difficulties, account access problems, or any other IT-related concerns.

### 4.2 Glossary of Terms

Here are some clear definitions for key concepts and terminology essential for navigating Oracle Unifier.

<b>Final Resolution</b>	The documented outcome of an Action Item, detailing how the issue or task was addressed and resolved.
<b>Site Location</b>	A field within the Action Items BP that allows users to select the specific site or location impacted by the action, or to indicate that all sites/locations are affected.

### 4.3 Abbreviations and Acronyms

Here, you will find a handy reference list of commonly used abbreviations and acronyms throughout your Oracle Unifier experience.

<b>PMO</b>	Project Management Office
<b>BP</b>	Business Process



## 4.4 Frequently Asked Questions

### 1. What are the prerequisites for managing Action Items in Unifier?

Before managing Action Items in Unifier, an Organization, Business Unit, Type, Subtype, and/or Project Shell must exist in Unifier. Additionally, users must be correctly assigned to their respective user groups, such as All Project Users or All Company Users.

### 2. Who is responsible for filling out the Action Item Form in Unifier?

The Action Item Form is filled out by the Initiator, who determines whether an action is required.

### 3. What happens after the Action Item Form is filled out by the Initiator?

After the Action Item Form is filled out, the Person Responsible receives a task to complete the action. They will provide a final resolution, create a risk if applicable, and reassign the action if necessary. Once completed, they will send the action to a Reviewer.

### 4. What are the responsibilities of the Reviewer in the Action Items process?

The Reviewer examines the steps taken for the action item, can add comments, reassign the form, and cancel the action if needed. Once reviewed, the Reviewer can send the action item to completion.

### 5. Can an Action Item record be edited after it reaches a terminal end status?

No, once an Action Item record reaches a terminal end status (either canceled or completed), it is no longer editable.

### 6. How is the Action Item record archived in Unifier?

Upon reaching a terminal end status, the Action Item record is automatically converted to a PDF and published into the Document Manager.

### 7. What happens if a risk is created during the Action Item process?

If a risk is created, a corresponding Risk record will exist in the Risks Business Process within Unifier.

### 8. Can the Person Responsible reassign the action to someone else?

Yes, the Person Responsible can reassign the action if they are not the appropriate party to complete it.

### 9. Is the data from Action Items available for reporting in Unifier?

Yes, once the Action Item is processed, the data is written to the Unifier database and is available for reporting.

### 10. What steps are involved in completing an Action Item?

The Person Responsible completes the necessary steps, provides a resolution, and sends it to the Reviewer. The Reviewer then examines the action, adds any necessary comments, reassigns, or cancels it if needed, and finally sends it to completion.