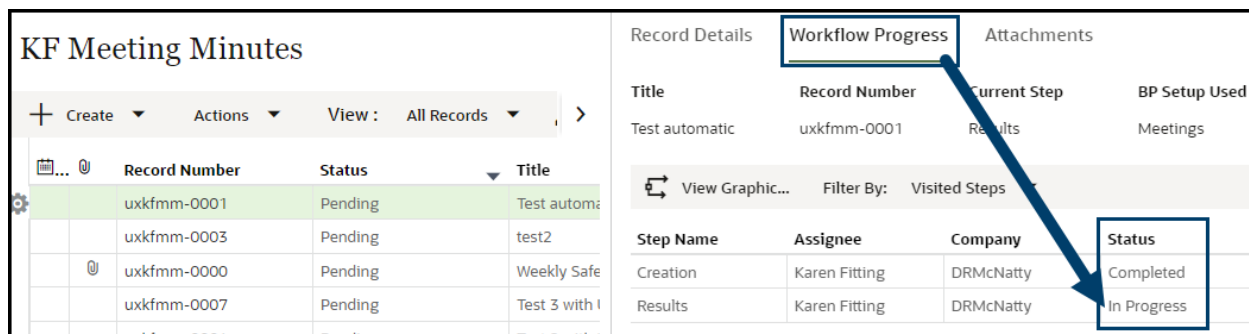


# TECH TIP

## SHOWING BP RECORDS WITH OUTSTANDING TASKS ORACLE PRIMAVERA UNIFIER

There's more than one way to generate a listing of outstanding tasks for a given business process. For example, when you are reviewing a specific record's Workflow Progress, you are easily able to see which step is In Progress as well as the Assignee.

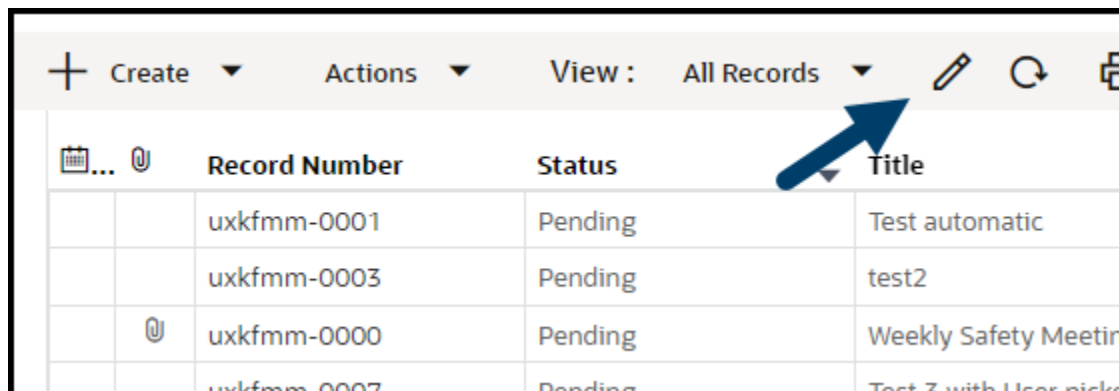


The screenshot shows a record titled "KF Meeting Minutes" with a "Workflow Progress" tab selected. The workflow progress table shows the following steps:

Step Name	Assignee	Company	Status
Creation	Karen Fitting	DRMcNatty	Completed
Results	Karen Fitting	DRMcNatty	In Progress

In order to see this information for many records at once, the two most straight forward places are from the BP Log or a User Defined Report (UDR).

Every BP log can be customized to your liking. From the log, click the pencil icon to edit.

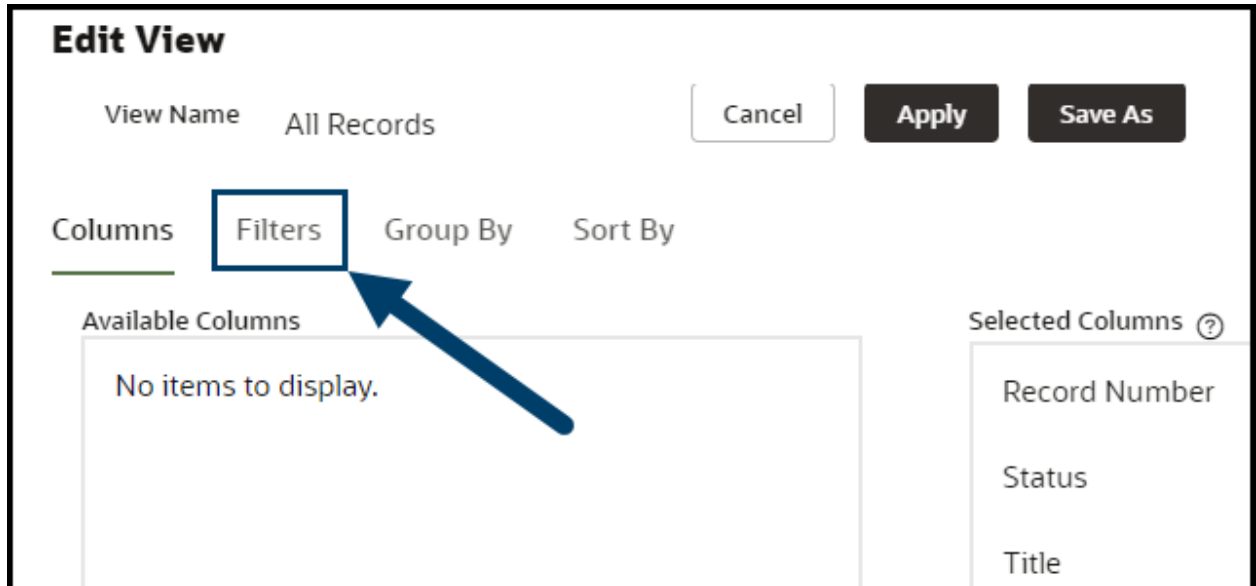


The screenshot shows a table with the following columns: Record Number, Status, and Title. The records listed are:

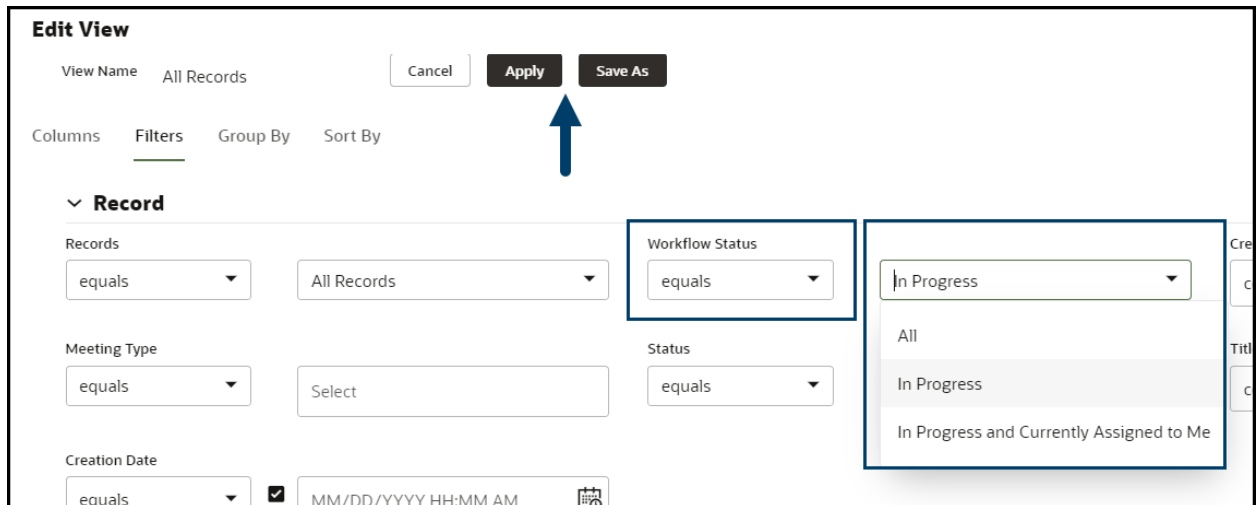
Record Number	Status	Title
uxkfmm-0001	Pending	Test automatic
uxkfmm-0003	Pending	test2
uxkfmm-0000	Pending	Weekly Safety Meeting
uxkfmm-0007	Pending	Test 3 with User pick

Modify the columns, as you like. To see just the outstanding records, click the Filters tab.

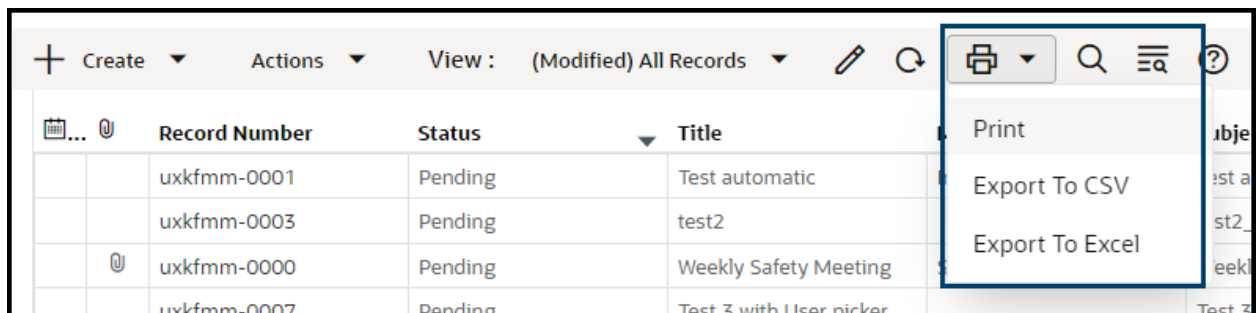
# SHOWING BP RECORDS WITH OUTSTANDING TASKS



Select the Workflow Status for the records you wish to view. Edit the Group By and/or Sort By tabs to your liking. When ready, click Apply or Save As to reuse this view again.



Once the records are displayed, click the print icon and select your print option.



## SHOWING BP RECORDS WITH OUTSTANDING TASKS

A User Defined Report (UDR), can be built to filter the Workflow Task Action appropriately. Here, we're filtering for tasks that are In Progress or Not Started.

### Add Data Element Query Condition ✕

**Data Element \***

Workflow / Task / Task Action ☑ ✕

**Label**

Workflow / Task / Task Action

**Condition \***

equals ▾

**Values**

In Progress ✕ Not Started ✕ ✕

Allow users to modify value(s) during execution.

Cancel Save Save & Add New

# SHOWING BP RECORDS WITH OUTSTANDING TASKS

Once the report is saved, from the Report log, you can set permissions as well as schedule the report to automatically generate and optionally Auto-email to specific users/groups.

The screenshot displays the 'User-Defined Reports' interface. On the left, a table lists reports with columns for Name, Description, and Data Type. A report named 'Meetings' is highlighted. On the right, the 'Schedule' tab is active, showing options to enable scheduled runs, set output format (PDF), frequency (Daily), and range of recurrence (No end date). There are also checkboxes for auto-emailing reports to the owner or to users and groups.

Name	Description	Data Type
Meetings		KF Meeting Minut

**Scheduled Report Runs**

- Enable Scheduled Reports Run

**Output Format & Scheduling Frequency**

Output Format \*  
PDF

Frequency \*  
Daily

Range of Recurrence \*  
No end date

**Additional Information**

- Auto-email as attachment to report owner
- Auto-email as attachment to users and groups

