



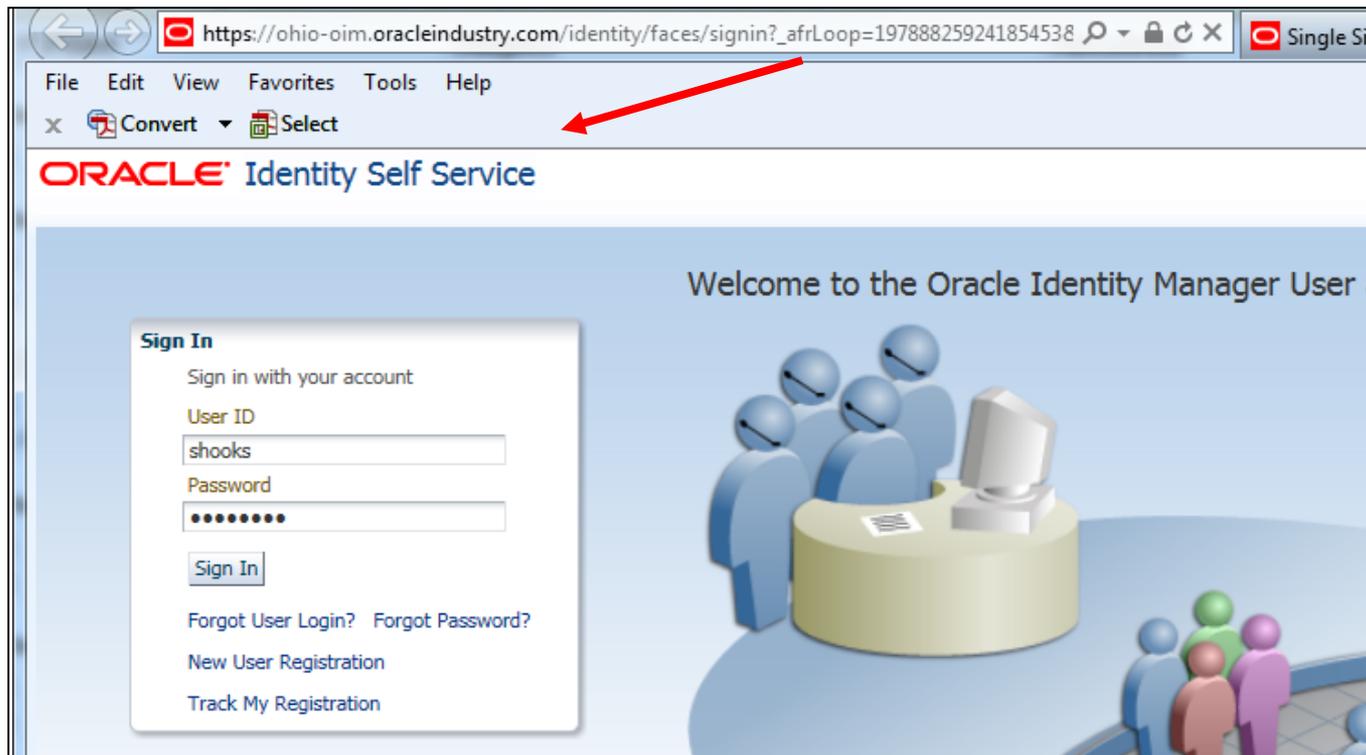
Cloud Navigation

Using Oaks CI in the Cloud

- ▶ Oaks CI is now housed in a cloud-based system at the following URL:
 - <https://ohio-unifier.oracleindustry.com>
- ▶ Passwords for Oaks CI are now housed in a separate system called Oracle Identity Manager (OIM) which can be accessed here:
 - <https://ohio-oim.oracleindustry.com/oim>
- ▶ In this Job Aid we will discuss:
 - Using OIM to manage your Oaks CI password (Pages 3–4)
 - Navigating Oaks CI (Page 5–15)
 - Navigating to Your Project (5–8)
 - Collaboration: Tasks, Messages, Drafts (9–13)
 - Document Manager (14)
 - Logs: Business Processes (15)

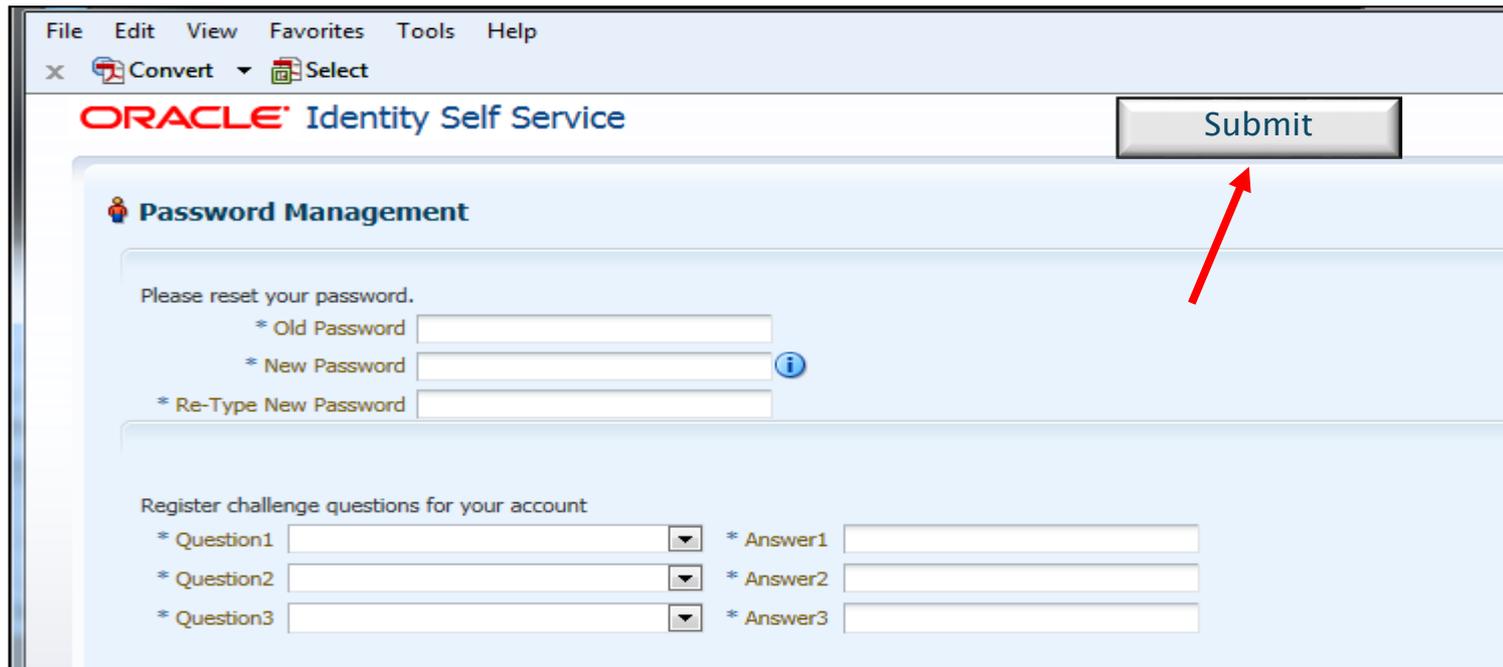
Oracle Identity Manager (OIM)

- ▶ To reset your password or to set your security questions, login to the OIM website:
<https://ohio-oim.oracleindustry.com/oim>
- ▶ Type in your Username and Password. This is the same as the login information you use for accessing Oaks CI.
- ▶ Click “Sign In”



Oracle Identity Manager (OIM)

- ▶ Once logged in, the system will prompt you to reset your password (if this is your first log in) and set your security questions
- ▶ Type in requested information and Click “Submit”. Then Click “Sign Out” to log out of OIM



The screenshot displays the Oracle Identity Self Service interface. At the top, there is a navigation bar with 'ORACLE Identity Self Service' and a 'Submit' button. Below this, the 'Password Management' section is visible. It contains a prompt to reset the password, followed by three input fields: '* Old Password', '* New Password', and '* Re-Type New Password'. Below these fields, there is a section for 'Register challenge questions for your account', which includes three rows of 'Question' and 'Answer' input fields. A red arrow points to the 'Submit' button.

Note: You will only utilize this site to change your password. No other Oaks CI functions will take place here.

Navigate to OAKS CI

- ▶ Open any web browser

Note: While testing we found that Google Chrome works best for us

- ▶ Navigate to: <https://ohio-unifier.oracleindustry.com>

- ▶ Enter your assigned Username and Password

- ▶ Click “Login”

Note: Please ensure that your pop-up blocker is disabled for this site



Cross Project Home Page

The screenshot shows the Oracle Primavera Unifier interface. At the top, the browser address bar displays <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page header includes the Oracle Primavera Unifier logo, the user name "Shauna Hooks", and options for "Help" and "Sign Out". The navigation bar shows tabs for "Home", "Projects", "Program", "Agency", and "Higher Ed", with "Higher Ed" currently selected. A search bar labeled "Navigate To..." is positioned below the tabs. On the left side, there is a sidebar with icons for "Home", "Tasks", "Messages", "Drafts", and "uMail". The main content area features a "File Edit View Help" menu and a "New Open Find" toolbar. Below this, there are sections for "Announcements" and "Tasks or New uMails". The "Announcements" section contains two entries: "Unifier Outage" and "Draft Pay Request Issue". The "Tasks or New uMails" section contains a table with columns for "Project Number", "Name", "Tasks", "uMails", and "Company Name".

Cross project tabs

Announcements

Projects with Active Tasks

Project Number	Name	Tasks	uMails	Company Name
OCI-080001	Agency General Projects Test	25 Total, 11 New, 6 Late	5 New	State of Ohio
DMR-090010	Various Improvements, Tiffin & Northw		2 New	State of Ohio
DAS-100002	North High Complex - Phase 4		1 New	State of Ohio
DRC-050074	Lebanon Dietary Phase 2 -Food Prep		10 New	State of Ohio
DYS-990225	Interior Renovation Phase 3		5 New	State of Ohio
DRC-090026	Fire Alarm Upgrade - LeCl		1 New	State of Ohio
DRC-090052	Medical-Dental Addition - LorCI			

Locating your Organization or Project

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL: <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page header includes the Oracle Primavera Unifier logo and the text "Last login: 02/12/2015 12:24 PM". The navigation menu shows tabs for "Home", "Agency General Pr...", "Program", "Board of Regents", "Cleveland State Un...", and "Co". The search bar contains the text "bwcj-080002". A red arrow points from a red-bordered text box to the search bar. The search results are displayed in a table under the heading "Matched Locations".

Type in the name of the organization or project and click on the name of the project to open it

Matched Locations	Organization/Project Name	Agency/Bureau
BWC-080002	Elevator Modernization	/Agency/Bureau of Workers' Compensation
BWC-100002	BWC Ethics Tenant Improvements	/Agency/Bureau of Workers' Compensation
DAS-11N005	BWC Parking Garage Lighting Improvement	/Agency/Department of Administrative Services
BWC-110001	L-16 Halon Replacement Project	/Agency/Bureau of Workers' Compensation
BWC-130001	Emergency generator power back up to the York chillers	/Agency/Bureau of Workers' Compensation
BWC-130002	OFCC Tenant Improvements	/Agency/Bureau of Workers' Compensation
BWC-130003	15th floor Halon Replacement	/Agency/Bureau of Workers' Compensation
BWC-140001	William Green Fire Alarm Upgrade	/Agency/Bureau of Workers' Compensation
BWC-150001	WGB Rear Lobby Renovation	/Agency/Bureau of Workers' Compensation
BWC01	Bureau of Workers' Compensation	/Agency

Below the "Matched Locations" table, there is a section for "Key Locations" with the following data:

Key Locations	Organization/Project Name	Status	Location
DMR-090010	Various Improvements, Tiffin & Northw	2 New	State of Ohio
DAS-100002	North High Complex - Phase 4	1 New	State of Ohio
DAS-050034	Liberty District Phase 2 - Food Ser	10 New	State of Ohio

On the right side of the interface, there is a section titled "Items Requiring Your Attention:" with the following summary:

- Tasks: 25 Total, 9 New, 5 Late
- Messages: 1 New
- Draft Records: 49 New
- uMails: 72 New

Project Home Page

The screenshot shows the Oracle Primavera Unifier interface. The browser address bar displays the URL <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page header includes the Oracle Primavera Unifier logo, the user name 'Proxy for Kayli', and the last login time '07/22/2015 11:21 AM'. The breadcrumb navigation shows the path: Agency > Department of... > Lock-Door Up... The left sidebar contains a navigation menu with the following items: Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. Red arrows point to the Collaboration, Document Manager, and Logs items. The main content area is titled 'Lock-Door Upgrade - Home' and contains a 'Summary' tab, an 'Image' placeholder, and a 'Details' section. The 'Details' section provides the following information:

Project Number:	DRC-16L006
Project Name:	Lock-Door Upgrade
Description:	This project will replace the locking system in the segregation housing unit (ranges C, D, E, and F) approx. 72 cell from doors at Chillicothe Correctional Institution.
Administrator:	Moenique Morris
Currency:	United States Dollar (USD)
Status:	Active
Email Address:	2105-test@oracle.com

Most work is completed in 3 areas:

Collaboration– Your Work

Document Manager– Your supporting documentation

Logs– Where records are housed and created

Collaboration– All About You!

Unifier@https://ohio-unifier.oracleindustry.com - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/g/nav/index

ORACLE PRIMAVERA UNIFIER Last login: 08/18/2015 05:51 AM

Company Workspace Miami Trace-LSD-... x +

Navigate To... School Facilities Miami Trace-L...

Miami Trace-LSD-FAY-CFAP-2014

File Edit View Help

Miami Trace-LSD-FAY-CFAP-2014 - Home

Summary

Image

Details

OAKS Code:	SFC-160389
District Project Identifier:	Miami Trace-LSD-FAY-CFAP-2014
Description:	Build New High to house 831 9-12, CT students in a 129,613.84 square foot facility at a total project cost of \$34,638,594.68
Administrator:	Kaylie Ruff
Currency:	United States Dollar (USD)
Status:	Active

New Open Find

Collaboration houses:

- Tasks
- Messages
- Drafts

Tasks

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a tree view of folders: Projects (Standard), OAKS CI Training 2 - Home, Summary, Alerts, uMail, Collaboration, Tasks, Messages, Drafts, Information, Cost Manager, Data Manager, Document Manager, Schedule Manager (Basic), Logs, and Reports. The 'Tasks' folder is highlighted, and a red arrow points from a text box below to it. The main content area displays a table of tasks with columns: Type, Number, Title, Record Due, From, Sent for, Task Due, and Received. The table contains 10 items.

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Action Item	AI-00066	indigo	09/30/2009	Shauna Hook	Response		09/23/2009
Action Items	AI-00065	Visit	09/30/2009	Shauna Hook	Response		09/23/2009
Request for	RFI-00007	HVAC 1		Consultant St	Response Acc	09/07/2009*	08/31/2009
Action Item	AI-00054	dsds	09/07/2009*	Consultant St	Review		08/31/2009
Action Item	AI-00015	New Action	07/20/2009*	Shauna Hook	Response		07/13/2009
Change Orc	CO-0004	Bruce's and Rita's		Oaks Student	CM Review		07/09/2009
Action Items	AI-00012	Project One	06/19/2009*	Oaks Student	Response		06/12/2009
Contract Sc	C SOV-0004	General Prime - ?		Fred Holcom	Associate Apt		04/16/2009
Subcontract	SSD-0009	T P Mechanical C		Oaks Student	Associate Dec	04/19/2009*	04/16/2009
Subcontract	SSD-0008	PM		Oaks Student	Associate Dec	04/19/2009*	04/16/2009

Tasks: Any work that comes to you for approval or review

Messages

The screenshot shows a software application window titled 'Company Workspace' with a 'Projects' tab. The 'Messages' folder is selected in the left-hand navigation pane. The main window displays a list of 12 messages with the following columns: Type, From, Subject, and Received Date.

Type	From	Subject	Received Date
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	09/14/2009
Action Items	Consultant Student5,s	AI-00039: George's Visit	08/13/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0023: Waterspout Widgeits	07/21/2009
Submittals	Fred Holcomb,soo	SUB-0002: Fred Submittal #1	05/26/2009
Submittals	Fred Holcomb,soo	SUB-0002: Fred Submittal #1	05/26/2009
Contract Schedule of Values	Steve Mayo,soo	C SOV-0003: Plumbing Prime - Oak	04/15/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0003: Fred Sum Dec 1	04/10/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0002: Approved Componete &	04/04/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0002: Approved Componete &	04/04/2009
Contract Schedule of Values	Fred Holcomb,soo	C SOV-0002: General Prime 2 - San	04/04/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	04/02/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	04/02/2009

Messages: Any tasks you have been carbon copied on, no action required

Drafts

The screenshot shows a software interface with a navigation pane on the left and a main content area on the right. The navigation pane is titled 'Projects (Standard)' and contains several folders, including 'Drafts'. The 'Drafts' folder is selected, and a red arrow points from a text box to it. The main content area displays a table of draft items.

Drafts - Current View: All
11 Item(s)

Type	Number	Title	Last Saved
Meeting Minutes			09/21/2009
Action Items			09/21/2009
Action Items		shauna	09/21/2009
Design Reviews			08/28/2009
Contract Schedule of		Plumbing - Mayo	08/20/2009
Subcontractor/Suppli		Oaks Plumbing	08/19/2009
Contractor Pay Requi			06/25/2009
Action Items			05/12/2009
Fund Transfers		shooks	01/15/2009
Action Items		JKH	11/06/2008
Action Items		blah	11/06/2008

Drafts: Unfinished records you have created and saved

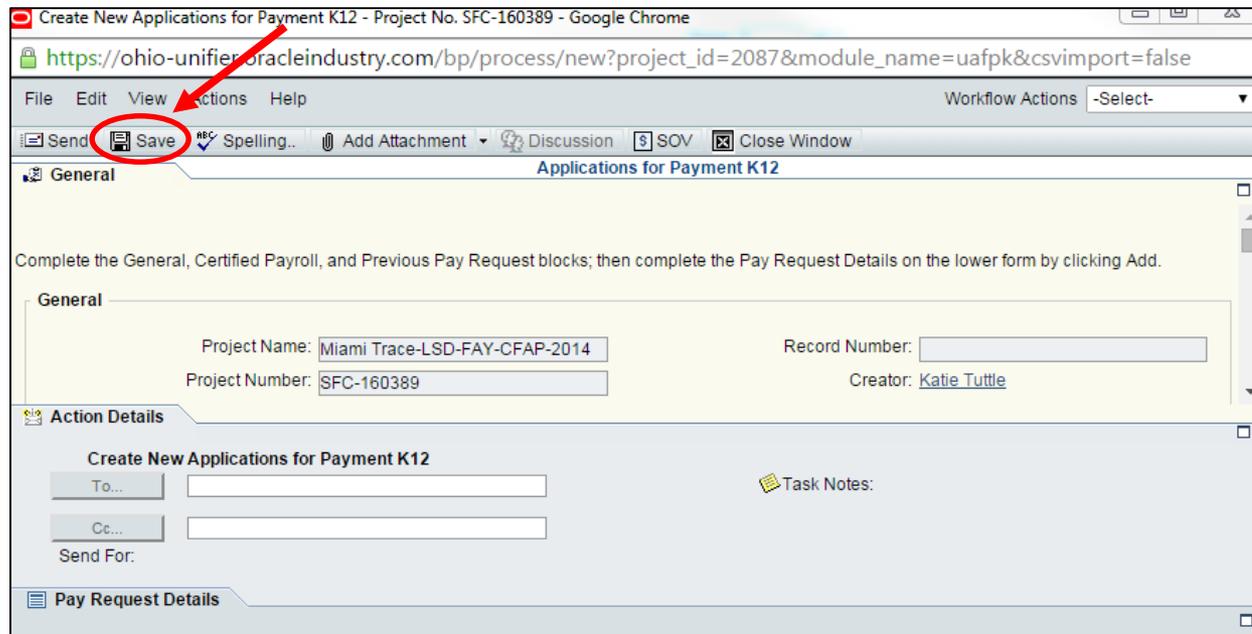
Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

- ▶ All unsaved work will be lost
- ▶ No warning will be given

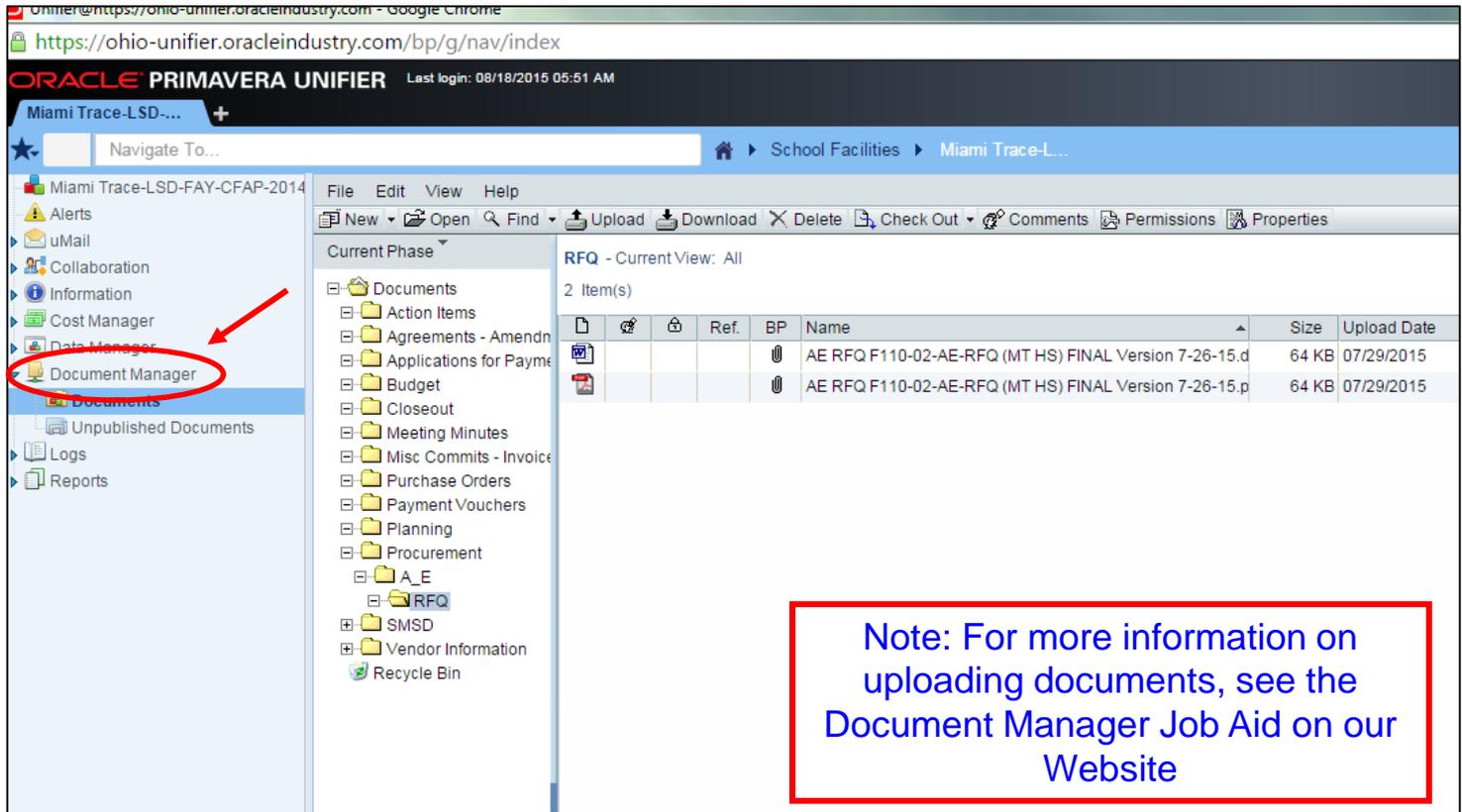


Use "Save" if needed to save work as a draft



Document Manager

- ▶ Document manager houses all supporting documentation
- ▶ Based on your particular project, the utilization of Document Manager will differ
 - ▶ For more information on Document Manager please see the Job Aid located on our website: <http://ofcc.ohio.gov/Resources/OAKSCI.aspx>



The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page title is "ORACLE PRIMAVERA UNIFIER" with a last login of "08/18/2015 05:51 AM". The navigation pane on the left includes "Miami Trace-LSD-FAY-CFAP-2014" and "Document Manager" is highlighted with a red circle and a red arrow. The main content area shows a file explorer view for "RFQ - Current View: All" with 2 item(s). The table below lists the items:

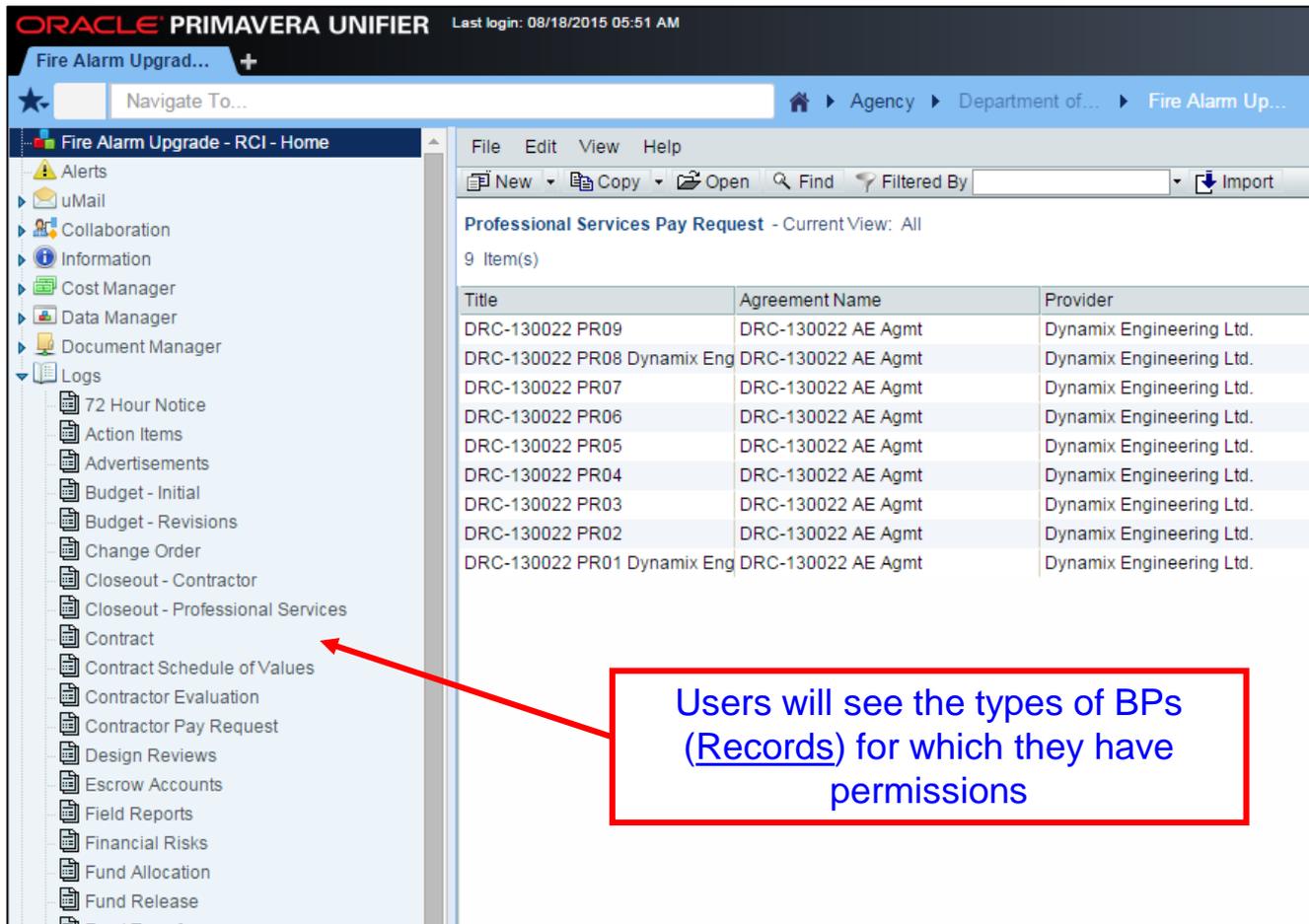
	Ref.	BP	Name	Size	Upload Date
			AE RFQ F110-02-AE-RFQ (MT HS) FINAL Version 7-26-15.d	64 KB	07/29/2015
			AE RFQ F110-02-AE-RFQ (MT HS) FINAL Version 7-26-15.p	64 KB	07/29/2015

Note: For more information on uploading documents, see the Document Manager Job Aid on our Website

Logs

Logs house Business Processes or “BPs” (Records)

- ▶ A BP is any Record that has been created (i.e. Pay Requests, Submittals, etc.) and submitted through a workflow for review or approval.



The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar shows the user is logged in as 'Fire Alarm Upgrad...' on 08/18/2015 at 05:51 AM. The left sidebar contains a tree view of various business processes, with 'Logs' expanded to show a list of items including '72 Hour Notice', 'Action Items', 'Advertisements', 'Budget - Initial', 'Budget - Revisions', 'Change Order', 'Closeout - Contractor', 'Closeout - Professional Services', 'Contract', 'Contract Schedule of Values', 'Contractor Evaluation', 'Contractor Pay Request', 'Design Reviews', 'Escrow Accounts', 'Field Reports', 'Financial Risks', 'Fund Allocation', and 'Fund Release'. A red arrow points from a red-bordered box containing text to the 'Contractor Pay Request' item in the sidebar. The main content area displays a table titled 'Professional Services Pay Request - Current View: All' with 9 items. The table has three columns: Title, Agreement Name, and Provider.

Title	Agreement Name	Provider
DRC-130022 PR09	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR08 Dynamix Eng	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR07	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR06	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR05	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR04	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR03	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR02	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR01 Dynamix Eng	DRC-130022 AE Agmt	Dynamix Engineering Ltd.

Users will see the types of BPs (Records) for which they have permissions

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211