

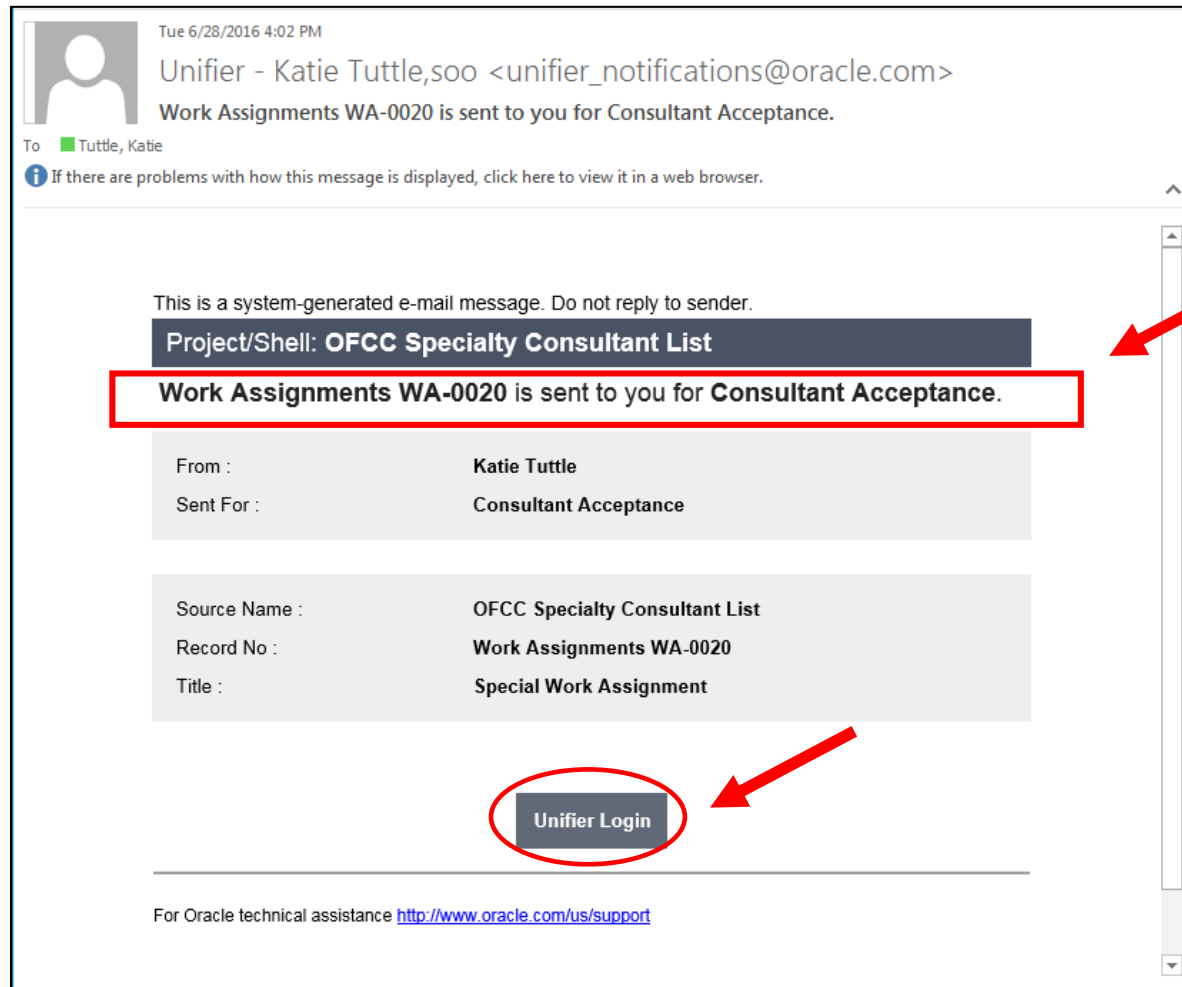


Accept Work Assignments

Consultant List Projects

Consultant Acceptance

- ▶ Consultant will receive an email notifying them that they have a task to complete in OAKS CI
- ▶ Click the link provided to access your task



Consultant Acceptance

- ▶ When in the system, click on Tasks, then click the Gear icon next to the task to open it

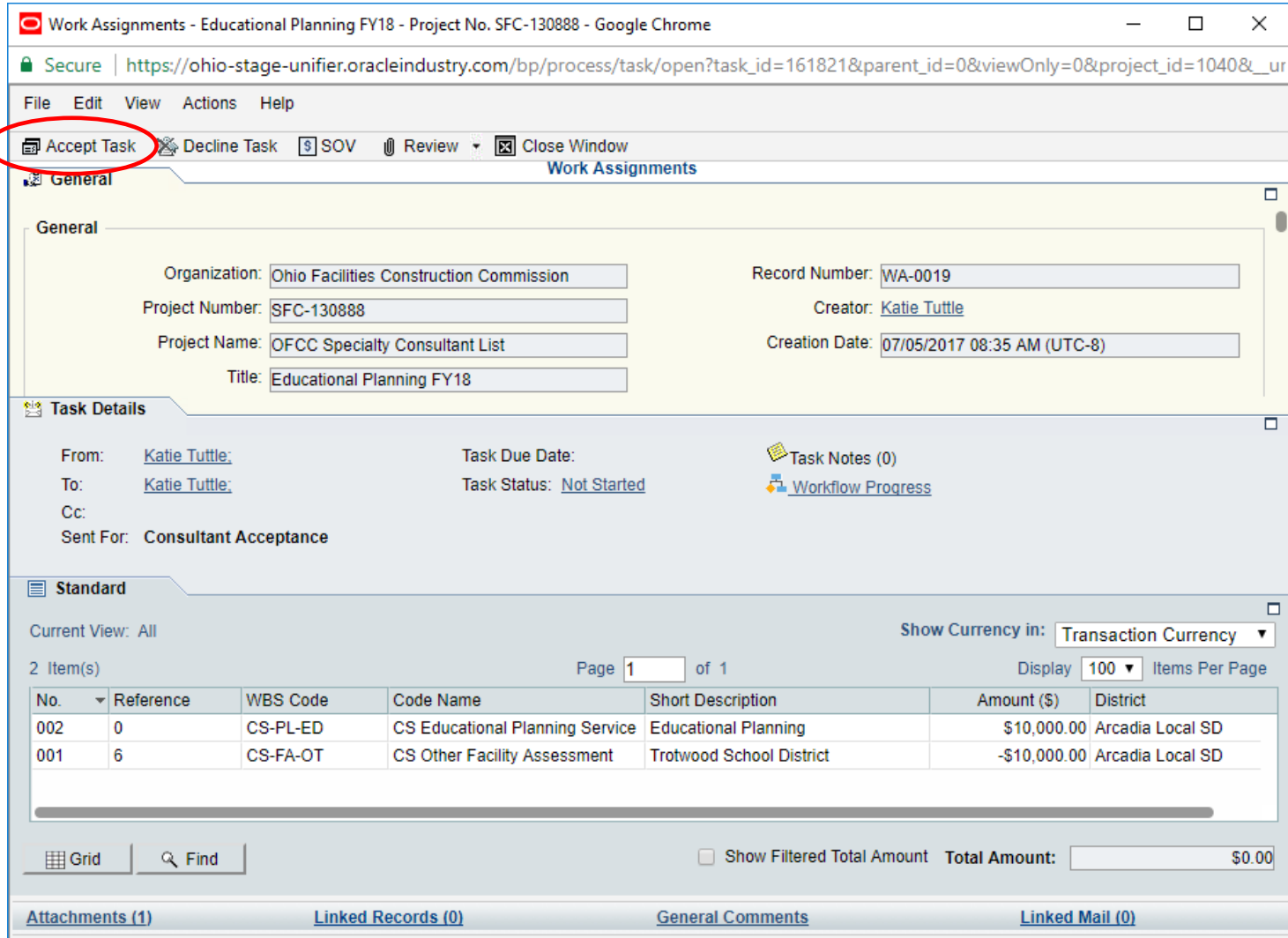
The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier (Development)', and the user name 'Katie Tuttle'. The breadcrumb trail shows the path: Agency > Ohio Facilities Co... > OFCC Specialty... The left sidebar contains a navigation menu with 'Tasks' highlighted in a red circle. The main content area shows a 'Tasks' table with columns for Origin, Business Process, Record Number, and Title. A context menu is open for the task 'OFCC Specialty Consultant List - Educational Planning FY18', with the 'Open' option selected. A red arrow points to the 'Open' option. The right sidebar shows the 'Record Details' for the selected task, including fields for Organization, Project Number, Project Name, Title, Requested By, Status, Agreement, Contract Reference, Request Type, Vendor Name, Type of Services, and Service Category.

Origin	Business Process	Record Number	Title
OFCC Specialty Consultant List	EDGE PS Pay Req...	DPR-010	Harrison Planning...
OFCC Specialty Consultant List	Work Assignments	WA-0019	Educational Plann...

Field	Value
Organization	Ohio Facilities Construction Commission
Record Number	WA-0019
Project Number	SFC-130888
Creator	Katie Tuttle
Project Name	OFCC Specialty Consultant List
Creation Date	07/05/2017 08:35 AM (UTC-8)
Title	Educational Planning FY18
Requested By	Status Pending
Contract Reference	Request Type Original
Harrison Planning Group - Facilities Assessment	
Vendor Name	Type of Services Educational Planning
Harrison Planning Group	
EDGE Certified Prime?	Service Category

Consultant Acceptance

- ▶ Click Accept Task to begin reviewing the Work Assignment



Work Assignments - Educational Planning FY18 - Project No. SFC-130888 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161821&parent_id=0&viewOnly=0&project_id=1040&_ur

File Edit View Actions Help

Accept Task Decline Task SOV Review Close Window

Work Assignments

General

General

Organization: Ohio Facilities Construction Commission Record Number: WA-0019
Project Number: SFC-130888 Creator: Katie Tuttle
Project Name: OFCC Specialty Consultant List Creation Date: 07/05/2017 08:35 AM (UTC-8)
Title: Educational Planning FY18

Task Details

From: Katie Tuttle Task Due Date: Task Notes (0)
To: Katie Tuttle Task Status: Not Started Workflow Progress
Cc:
Sent For: Consultant Acceptance

Standard

Current View: All Show Currency in: Transaction Currency

2 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount (\$)	District
002	0	CS-PL-ED	CS Educational Planning Service	Educational Planning	\$10,000.00	Arcadia Local SD
001	6	CS-FA-OT	CS Other Facility Assessment	Trotwood School District	-\$10,000.00	Arcadia Local SD

Grid Find Show Filtered Total Amount Total Amount: \$0.00

Attachments (1) Linked Records (0) General Comments Linked Mail (0)

Consultant Acceptance

- Review information in the upper (General) and lower (Standard) forms

The screenshot displays the Oracle Work Assignments form for Educational Planning FY18. The 'General' tab is selected and circled in red. The form contains the following information:

- Organization: Ohio Facilities Construction Commission
- Record Number: WA-0019
- Project Number: SFC-130888
- Creator: Katie Tuttle
- Project Name: OFCC Specialty Consultant List
- Creation Date: 07/05/2017 08:35 AM (UTC-8)
- Title: Educational Planning FY18
- Requested By: [Empty]
- Status: Pending

The 'Standard' tab is also visible and circled in red. It displays a table of work assignments:

No.	Reference	WBS Code	Code Name	Short Description	Amount (\$)	District
002	0	CS-PL-ED	CS Educational Planning Service	Educational Planning	\$10,000.00	Arcadia Local SD
001	6	CS-FA-OT	CS Other Facility Assessment	Trotwood School District	-\$10,000.00	Arcadia Local SD

Consultant Acceptance

- ▶ Accept the Work Assignment by choosing the Workflow Action: Sign Work Assignment. Record goes to the End step.
- ▶ Click Send

The screenshot shows the Oracle Work Assignments interface in a Google Chrome browser window. The browser title is "Work Assignments - Educational Planning FY18 - Project No. SFC-130888". The URL is "https://ohio-stage-unifier.oracleindustry.com/.../process/task/open?task_id=161821&model=uwa&project_id=1040&initiateBP=&bulk:". The browser menu bar includes File, Edit, View, Actions, and Help. The "Workflow Actions" dropdown menu is open, showing "Sign Work Assignment" and "Return for Clarification". The "Sign Work Assignment" option is highlighted. A red arrow points to the "Sign Work Assignment" option. Below the dropdown menu, the "Send" button is highlighted with a red box. The main content area shows the "Sign Work Assignment" workflow action. The "General" section contains the following information: Organization: Ohio Facilities Construction Commission, Record Number: WA-0019, Project Number: SFC-130888, Creator: Katie Tuttle, Project Name: OFCC Specialty Consultant List, and Creation Date: 07/05/2017 08:35 AM (UTC-8). The "Action Details" section shows the "Sign Work Assignment" action with a "To..." field, a "Cc..." field, and a "Send For: End" button. The "Standard" section shows a table with 2 items. The table has columns for No., Reference, WBS Code, Code Name, Short Description, Amount (\$), and District. The table data is as follows:

No.	Reference	WBS Code	Code Name	Short Description	Amount (\$)	District
002	0	CS-PL-ED	CS Educational Planning Service	Educational Planning	\$10,000.00	Arcadia Local SD
001	6	CS-FA-OT	CS Other Facility Assessment	Trotwood School District	-\$10,000.00	Arcadia Local SD

The "Standard" section also shows a "Current View: All" and a "Show Currency in: Transaction Currency" dropdown. The "Page 1 of 1" and "Display 100 Items Per Page" are also visible. The "Total Amount" is \$0.00. The "Attachments (1)", "Linked Records (0)", "General Comments", and "Linked Mail (0)" sections are also visible at the bottom.

Additional Resources

- ▶ The Work Assignment is now complete and a Pay Request can be created.

- ▶ For more information on how to create your pay request, please refer to the Job Aid on the OFCC website:
<http://ofcc.ohio.gov/OAKSCI/Agency-HigherEdTraining.aspx#1607170-agencyhigher-ed-consultant-list-projects>

Questions?

Please contact OAKS CI Support Desk:

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