



Create DPE PS Pay Request RPC Consultants

Purpose and Procedure

- ▶ Provides for the submission, review, and approval of interim or final payment requests for services completed by the regional planning coordinator
- ▶ References and relates directly to the schedule of values (SOV) line item amounts as outlined in the Agreement

- ▶ Workflow

Created by: **RPC Consultant** → Submitted to: **Planner Approval** →
Sent to: **RPC Update (if necessary)** → Sent to: **OFCC Fiscal for Review** →
Sent to: **OFCC for Payment Process**

Creation Step

- ▶ RPC Consultant:
 - ▶ Creates the DPE PS Pay Request
 - ▶ Submits the Request for Approval
 - ▶ **Note:** Any documents that need attached to the pay request must be uploaded into Document Manager first
 - ▶ For information on Document Manager, please refer to the Job Aid on the OFCC website, ofcc.ohio.gov, under **All Users**

DPE PS Pay Request Creation

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> DPE PS Pay Request
 - ▶ Click New

The screenshot displays the Oracle Primavera Unifier application window. The title bar shows 'ORACLE PRIMAVERA Unifier'. The browser address bar indicates the user is logged in as 'Agency' in 'Ohio Fa'. The main interface is divided into a left-hand navigation pane and a right-hand content area.

In the left-hand navigation pane, the 'Logs' menu item is circled in red. A red arrow points from this menu item towards the right-hand content area. Below 'Logs', the 'DPE PS Pay Request' menu item is highlighted.

The right-hand content area shows the 'DPE PS Pay Request' - Current View: All. It displays a table with 9 items. The table has three columns: Title, Agreement Name, and Provider. The items listed are:

Title	Agreement Name	Provider
65% PR1	Harrison Planning Group - Facilities / Harri	
Hooks Co. PR1	Harrison Planning Group - Facilities / Harri	
Hooks Co. PR1	Harrison Planning Group - Facilities / Harri	
Trotwood Madison 65%	Harrison Planning Group - Facilities / Harri	
Champion LSD PR1	Harrison Planning Group - Facilities / Harri	
Harrison Planning PR 2	Harrison Planning Group - Facilities / Harri	
Harrison Planning PR 1	Harrison Planning Group - Facilities / Harri	
Resource RPC July 2014 Take 2	Resource International - RPC	Resc
Resource RPC July 2014	Resource International - RPC	Resc

Complete Form

- ▶ Enter the required * fields
 - ▶ Enter the Title
 - ▶ Select Contract Reference
 - ▶ Select Period From and Period To

Organization:

Project Number: SFC-130888

Project Name: OFCC Specialty Consultant List

Project Location: OFCC

Title: Test Consultant PR *

Contract Reference: Consultant Name-Prj Select... *

Agreement Type: Study

Other Description:

Period From: 06/01/2016 05:00 PM (UTC-8) *

Period To: 06/30/2016 05:00 PM (UTC-8) *

Professional Services Provider Address

Vendor: Amazing Architectural Inc. Select... *

Address Line 1: 3131 Main St

Address Line 2:

Action Details

Pay Request Details

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Professional Services Agreements - Current View: All Project Records	
3 Item(s)	Page 1 of 1 Display 100 Items Per Page
Title	Professional Services Provider
Harrison Planning Group - Facilities	Harrison Planning Group
Resource International - RPC	Resource International, Inc.
Consultant Name-Project Number	Amazing Architectural Inc.

Complete Form

- ▶ Select the Vendor
- ▶ Complete the fields in the Payment Requested block

The screenshot displays a web application interface for creating a new DPE PS Pay Request. The main form is titled "Create New DPE PS Pay Request - Project No. SFC-130888" and is located at <https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate...>. The form is divided into several sections:

- General**: Contains the "Professional Services Provider Address" section with fields for Vendor (Amazing Architectural Inc.), Address Line 1 (3131 Main St), Address Line 2, City (Columbus), State (Ohio), and ZIP (43215). A red circle highlights the "Select..." button next to the Vendor field, with a red arrow pointing to it.
- Payment Requested**: A section highlighted with a red box, containing fields for Final Payment? (No), Invoices for Reimbursable Exp. Attached? (-Select-), Amount (\$), Line Item Total (\$), and Difference (\$).
- Notes**: A text area for entering notes.
- Action Details**: A section for action details.
- Pay Request Details**: A section for pay request details.

Overlaid on the right side of the main form is a window titled "Project Vendors - Google Chrome" showing a table of project vendors. The table has columns for OAKS Business Unit, Vendor Name, and OAKS Vendor. The data is as follows:

OAKS Business Unit	Vendor Name	OAKS Vendor
DAS01	Amazing Architectural Inc.	000000912
SFC01	Harrison Planning Group	
SFC01	Resource International, Inc.	000004198

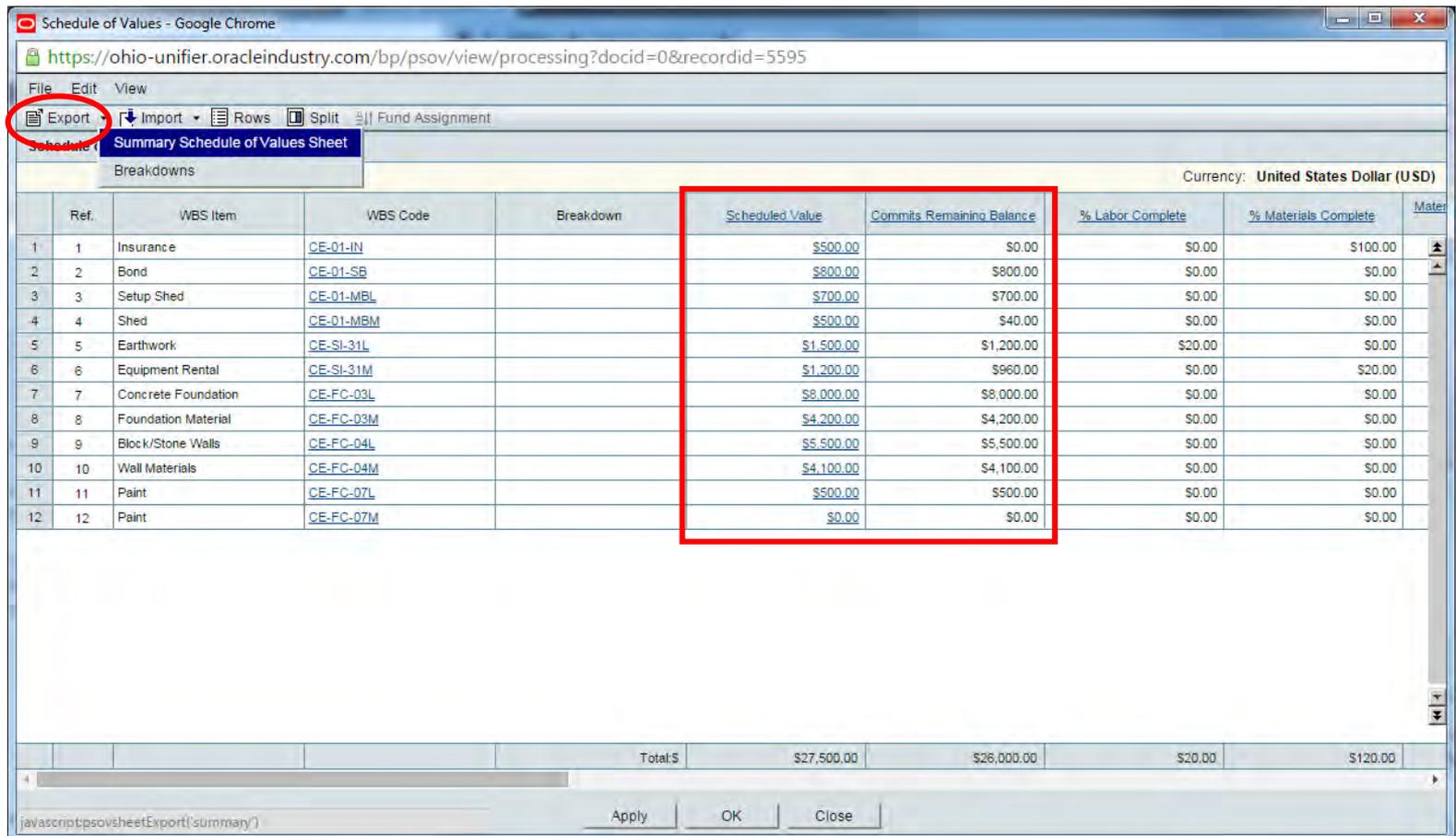
Review SOV

- ▶ Prior to adding lines to your pay request, you may want to view the remaining balance on your SOV (Schedule of Values)
- ▶ Click SOV at the top of your window

The screenshot shows a web browser window titled "Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome". The address bar displays the URL: https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=ucpr&csvimport=false. The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". Below the menu bar, there are icons for "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The "SOV" button is circled in red, and a red arrow points to it from the right. The main content area is titled "Contractor Pay Request" and has tabs for "General", "Action Details", and "Pay Request Details". Below the tabs, it shows "Current View: All", "0 Item(s)", "Page 1 of 1", and "Display 100 Items Per Page". A table with the following columns is visible: "No.", "WBS Code", "Commit Short Description", "Scheduled Value", "Previously Earned", "Earned This Period", "% Labor Complete", "% Materials Complete", "% Services Complete", and "DPE or Reimb". At the bottom right, there is a "Total Amount:" field showing "\$0.00". The footer contains links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Review SOV

- ▶ This allows you to look at the Scheduled Value and Commits Remaining Balance for each of the line items on your SOV
- ▶ You can also export the SOV to Excel by clicking Export and choosing the Summary Schedule of Values Sheet



Screenshot of a web browser displaying a Schedule of Values (SOV) table. The browser window title is "Schedule of Values - Google Chrome" and the URL is "https://ohio-unifier.oracleindustry.com/bp/psov/view/processing?docid=0&recordid=5595". The browser menu bar shows "File", "Edit", and "View". The "Export" button is circled in red, and a red arrow points to it. The "Export" dropdown menu is open, showing "Summary Schedule of Values Sheet" selected. The table below shows the SOV data, with the "Scheduled Value" and "Commits Remaining Balance" columns highlighted in a red box. The table has 12 rows of line items and a total row at the bottom. The currency is "United States Dollar (USD)".

Ref.	WBS Item	WBS Code	Breakdown	Scheduled Value	Commits Remaining Balance	% Labor Complete	% Materials Complete	Material
1	Insurance	CE-01-IN		\$500.00	\$0.00	\$0.00	\$100.00	
2	Bond	CE-01-SB		\$800.00	\$800.00	\$0.00	\$0.00	
3	Setup Shed	CE-01-MBL		\$700.00	\$700.00	\$0.00	\$0.00	
4	Shed	CE-01-MBM		\$500.00	\$40.00	\$0.00	\$0.00	
5	Earthwork	CE-SI-31L		\$1,500.00	\$1,200.00	\$20.00	\$0.00	
6	Equipment Rental	CE-SI-31M		\$1,200.00	\$960.00	\$0.00	\$20.00	
7	Concrete Foundation	CE-FC-03L		\$8,000.00	\$8,000.00	\$0.00	\$0.00	
8	Foundation Material	CE-FC-03M		\$4,200.00	\$4,200.00	\$0.00	\$0.00	
9	Block/Stone Walls	CE-FC-04L		\$5,500.00	\$5,500.00	\$0.00	\$0.00	
10	Wall Materials	CE-FC-04M		\$4,100.00	\$4,100.00	\$0.00	\$0.00	
11	Paint	CE-FC-07L		\$500.00	\$500.00	\$0.00	\$0.00	
12	Paint	CE-FC-07M		\$0.00	\$0.00	\$0.00	\$0.00	
Total \$				\$27,500.00	\$26,000.00	\$20.00	\$120.00	

JavaScript: psovsheetExport('summary')

Review SOV

- ▶ This is how your SOV will look in Excel
- ▶ **Note:** This file is for reference only. It cannot be re-imported into OAKS CI

Line Item	WBS Item	WBS Code Breakdown	Scheduled Value	Commits Remaining Balance	% Labor Complete	% Materials Complete
4	1 Insurance	CE-01-IN	\$500.00	\$0.00	\$0.00	\$100.00
6	2 Bond	CE-01-SB	\$800.00	\$800.00	\$0.00	\$0.00
7	3 Setup Shed	CE-01-MBL	\$700.00	\$700.00	\$0.00	\$0.00
8	4 Shed	CE-01-MBM	\$500.00	\$40.00	\$0.00	\$0.00
9	5 Earthwork	CE-SI-31L	\$1,500.00	\$1,200.00	\$20.00	\$0.00
10	6 Equipment Rental	CE-SI-31M	\$1,200.00	\$960.00	\$0.00	\$20.00
11	7 Concrete Foundation	CE-FC-03L	\$8,000.00	\$8,000.00	\$0.00	\$0.00
12	8 Foundation Material	CE-FC-03M	\$4,200.00	\$4,200.00	\$0.00	\$0.00
13	9 Block/Stone Walls	CE-FC-04L	\$5,500.00	\$5,500.00	\$0.00	\$0.00
14	10 Wall Materials	CE-FC-04M	\$4,100.00	\$4,100.00	\$0.00	\$0.00
15	11 Paint	CE-FC-07L	\$500.00	\$500.00	\$0.00	\$0.00
16	12 Paint	CE-FC-07M	\$0.00	\$0.00	\$0.00	\$0.00

Add Line Items

- ▶ Click on the Pay Request Detail Tab
- ▶ Click Add

The screenshot shows the Oracle HR system interface for creating a new DPE PS Pay Request. The browser window title is "Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2252&module_name=udppr&csvimport=fal. The page has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The main content area has a "General" tab selected, showing "DPE PS Pay Request". Below it is the "Action Details" section, where the "Pay Request Details" tab is selected and circled in red. The current view is "All". Below the tabs is a table with the following columns: "No.", "WBS Code", "Code Name", "Short Description", and "Amount". The table is currently empty. At the bottom of the page, there is a toolbar with "Add", "Copy", "Import", "Remove", "Grid", and "Find" buttons. The "Add" button is circled in red, and a red arrow points to it. To the right of the toolbar is a "Total Amount" field showing "\$0.00". At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Add Line Items

- ▶ Click on the arrow next to WBS Code and choose the appropriate WBS Code, Click Select
- ▶ Enter the District, Service Category, Item Quantity as “1”, Short Description and the Item Unit Cost (amount to be billed)
- ▶ Click OK

Line Item - Google Chrome
https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=form

DPE PS Pay Request Line Item:

Use the WBS Code select to identify the Work Assignment related to this payment then enter the details. You may import records from a spreadsheet.

General

SOV Reference Number: 3
WBS Code: CS-FA-OT
Code Name: CS Other Facility Assessment
District: Champion Local SD
Service Category: Facility Assessment
Work Assignment:
Short Description: Facility Assessment
Item Quantity: 1
Item Unit Cost: \$5,000.00
Percent Billed This Request: 100
Amount (\$): \$5,000.00

Professional Services EDGE
Certified?:

Attachments (0) Linked Records (0)

OK Cancel

SOV Picker - Google Chrome
https://ohio-dev-unifier.oracleindustry.com/bp/sov/picker?recordid=545

Select Find Close Window

SOV Picker

	Ref	Description	WBS Code
1	1	Contract Amount (Not Billable)	CS-FA-SV
2	2	Champion High School	CS-FA-OT
3	3	Champion Middle School	CS-FA-OT
4	4	Champion Central Elementary School	CS-FA-OT
5	5	Champion LSD Printing fee	CS-FA-OT
6	6	Trotwood School District	CS-FA-OT
7	7	Trotwood School District	CS-FA-OT
8	8	Trotwood School District	CS-FA-OT
9	9	Educational Planning	CS-PL-ED
10	10	planning	CS-PL-ED

Add Line Items

- ▶ Continue Adding Line Items as necessary
 - ▶ Line item information displays in the Pay Request Details
 - ▶ Continue to enter line items as necessary
 - ▶ Ensure that the dollar amount entered in the top of the form matches the dollar amount in the lower form

Final Payment?: No

Invoices for Reimbursable Exp. Attached?: -Select-

Amount (\$): \$5,000.00

Line Item Total (\$): \$5,000.00

Difference (\$): \$0.00

Notes:

Create New Professional Services Pay Request

To...

Cc...

Send For:

Pay Request Details

Current View: All

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

No.	WBS Code	Code Name	Short Description	Amount
001	AE-AS-SU	AE Site Surveying Services	Site Survey	\$5,000.00

Add Copy Import Remove Grid Find

Total Amount: \$5,000.00

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

Add Attachments

- ▶ Upload all documents to Document Manager prior to attaching documents to PS Pay Request record
- ▶ Click Add Attachment
- ▶ Choose Unifier Folder and locate your documents
- ▶ Select File and click OK

The screenshot shows the 'Create New DPE PS Pay Request' web application. The 'Add Attachment' button is highlighted with a red box. A red arrow points from the 'Unifier Folder' dropdown menu to the 'Select Files' dialog box. The dialog box shows a file explorer view of the 'Documents' folder, with a table of files including 'Test doc 5.docx' and 'test.docx'. The 'Attachments (2)' link at the bottom of the application is circled in red.

Documents - Current View: All

	Ref.	BP	Name	Size	Upload Date
			0300 Construction		
			0400 Post Construction		
			0500 Extra Services		
			0600 Budget		
			Test Uploads		
			Test doc 5.docx	13 KB	12/03/2014
			test.docx	10 KB	04/16/2010

Pay Request Details

No.	WBS Code	Code Name	Short Description	Amount
001	AE-AS-SU	AE Site Surveying Services	Site Survey	\$5,000.00

Attachments (2) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Submit Record

- ▶ Choose Workflow Action **Submit**
- ▶ The “To” box will populate with who the record needs to go to
- ▶ Click Send

Workflow Actions: Submit

Send

Submit

Submit

To... Barbara Taylor,Consultant Student1,Consultar

Send For: Approval and Validation

No.	SOV Reference Number	WBS Code	District	Service Category	Short Description	Amount	% Billed
001	3 CS-FA-OT		Champion Local SD	Facility Assessment	Facility Assessment	\$5,000.00	

Total Amount: \$5,000.00

What if I want to know the status of my Record?



Finding the Record Status

- ▶ Navigate to Logs, choose Record type, view Status column
- ▶ For more detail, double-click the record to open

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. Below this, there are tabs for 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. The main content area shows a table titled 'Change Order - Current View: All' with 13 items. The table has columns for CO No., CO Type, Contractor Name, Contract SOV, Title, Status, Total Amount, and Chan. The 'Status' column is highlighted with a red box, and a red arrow points to it from below. In the left-hand navigation menu, the 'Logs' option is circled in red, and the 'Change Order' option under the 'Change Order' category is also circled in red.

CO No.	CO Type	Contractor Name	Contract SOV	Title	Status	Total Amount	Chan
CO-18	Proposal Request	OCI Test General	OCI-090002-002	Test Proposal Request	Pending	\$5,000.00	
PR-001	Proposal Request	OCI Test General	OCI-090002-002	PR-001	Pending	\$0.00	
01	Request for Change Order	OCI Test General	001	Test Save	Pending	\$80,000.00	
001	Request for Change Order	OCI Test General	OCI-090002-002	Testing	Approved	(\$6,000.00)	GM
1	Request for Change Order	OCI Test General	OCI-090002-002	Test 9/13/2013	Approved	(\$3,000.00)	Ov
1234	Change Directive	OCI Test General	OCI-090002-002	shauna test 3/2013	Pending	\$0.00	Ov
j	Request for Change Order	OCI Test General	OCI-090002-002	test	Pending	\$2,500.00	Ov
6	Request for Change Order	OCI Test General	OCI-090002-002	Show Em	Terminated	(\$1,200.00)	Ov
5		OCI Test General	OCI-090002-002	Fix SOV Items Under Water	Approved	\$2,000.00	Otl
3		OCI Test General	OCI-090002-002	Test for Validation	Approved	(\$4,500.00)	En
123		OCI Test General	OCI-090002-002	CO 1	Pending	\$1,000.00	En
1	Proposal Request	OCI Test General	OCI-090002-002	test	Accepted	\$100.00	
	Proposal Request	OCI Test General	OCI-090002-002	SAO College CO 1	Pending	\$0.00	

Finding the Record Status

- ▶ Review Task Details
- ▶ Click Workflow Progress link to view status of the record

The screenshot displays the Oracle Change Order interface. The browser title is "Change Order - Test Proposal Request - Project No. OCI-080001 - Google Chrome". The URL is https://ohio-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=13565&model=uco&fromcostlog=1&project_id=1. The page has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar are buttons for "Accept Task", "Decline Task", "SOV", and "Close Window".

The main content area is titled "Change Order" and is divided into sections:

- General**: Contains fields for Organization (Department of Administrative Services), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS, CI Administration), Record Number (CO-0013), Creator (Katie Tuttle), Creation Date (05/16/2016 11:53 AM (UTC-5)), and Status (Pending).
- Task Details**: A red box highlights this section, which includes:
 - From: Katie Tuttle;
 - To: Project Manager:Katie Tuttle; [More...](#)
 - Cc:
 - Sent For: PM Review
 - Task Due Date:
 - Task Status: [Not Started](#)
- Task Notes (0)**: A red circle and arrow point to the [Workflow Progress](#) link.

The **Line Item List** section shows a table with 2 items:

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontr
002	0	CE-FC-03L	Concrete Labr	Concrete Labor	\$2,500.00	Bobs
001	2	CE-FC-03L	Concrete Labr	labor -concrete	\$2,500.00	Bobs

At the bottom, there is a "Total Amount:" field showing \$5,000.00. The footer contains links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Finding the Record Status

The screenshot displays a web browser window titled "Workflow Progress - Google Chrome" with the URL https://ohio-unifier.oracleindustry.com/bp/studio/workflow/show/progress?processid=104317&selected_node_id=810967&_uref=uuu736:n. The page shows the "Workflow Progress" for a "Test Proposal Request" with Record No. CO-0013. The workflow steps are listed in a table below.

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Katie Tuttle	State of Ohio	Completed	Submit	05/16/2016 11:53 AM (UTC-5)
Proposal Creation	Katie Tuttle	State of Ohio	Completed	Submit	05/16/2016 12:29 PM (UTC-5)
AE Review	Katie Tuttle	State of Ohio	Completed	Accept	06/19/2016 03:50 PM (UTC-5)
Proposal Update					
PM Review	Katie Tuttle	State of Ohio	Not Started		
PM Review	Moenique Morris	State of Ohio	Not Started		
PM Review	Sara Freetage	State of Ohio	Not Started		
PM Review	Shauna Hooks	State of Ohio	Not Started		
PM Review	Rita Nichols	State of Ohio	Not Started		
PM Review	Steve Mayo	State of Ohio	Not Started		
CO Validation and DocuSign Process Wait					
End					

Below the table is a flowchart diagram illustrating the workflow process. The steps are: Proposal Creation, AE Review, PM Review, Proposal Update, and CO Validation and DocuSign. The flow starts with Proposal Creation, leading to AE Review. From AE Review, the process can go to PM Review (labeled "Accept") or back to AE Review. From PM Review, it can go to Proposal Update (labeled "Accept") or back to PM Review (labeled "Return for Clarification"). From Proposal Update, it can go to CO Validation and DocuSign (labeled "Return for") or back to Proposal Update (labeled "Withdraw"). From CO Validation and DocuSign, it can go back to PM Review (labeled "Return for").

Two red callout boxes with blue text and arrows point to the table and the flowchart respectively:

- View the workflow of the Record from Creation to End
- Diagram view of the workflow

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

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