




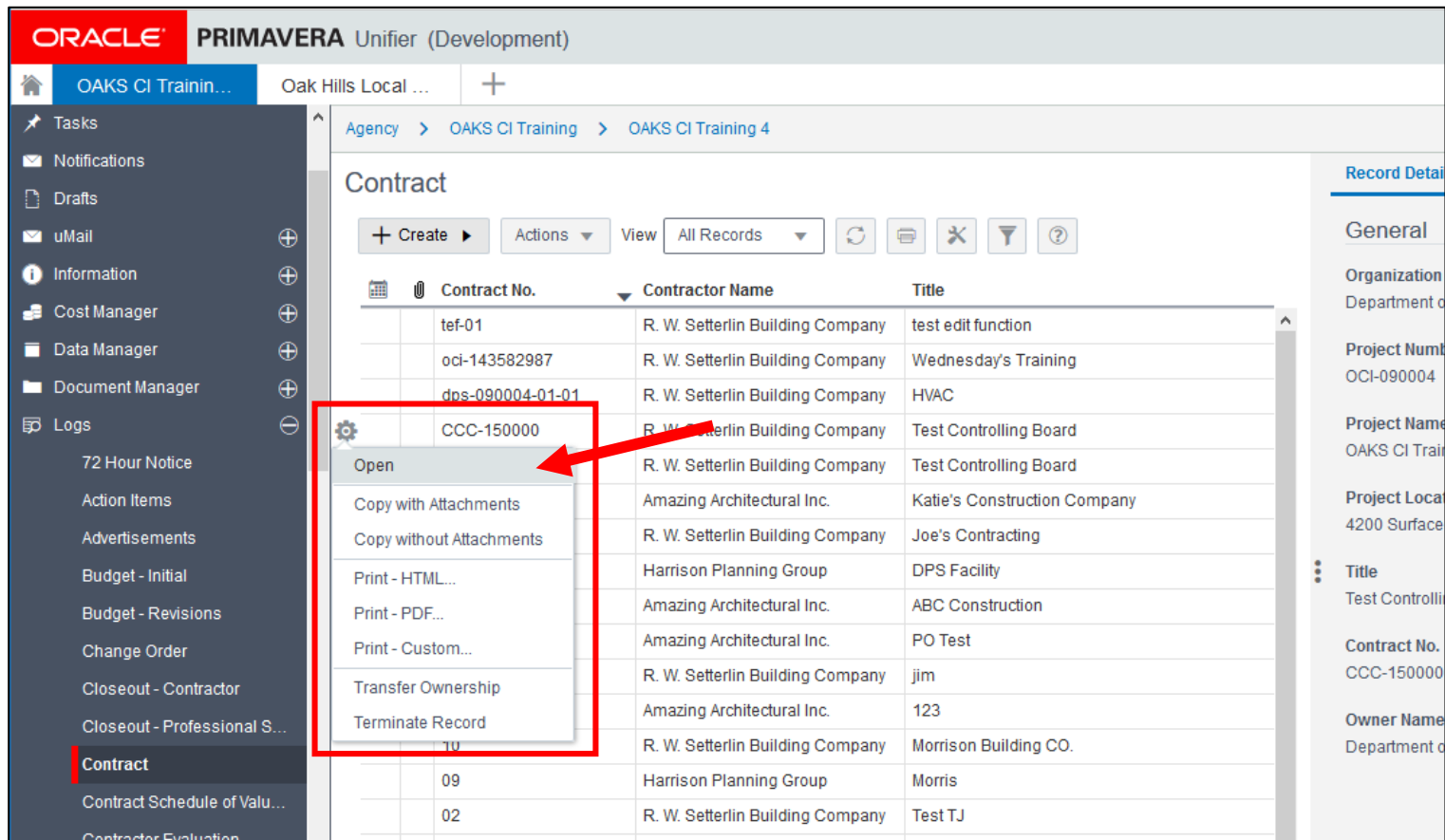
Printing Records & Custom Prints Agency/Higher-Ed

Purpose

- ▶ Custom Prints (slides 3-6):
 - ▶ Custom Prints provide a way to use data from a single OAKS CI record to create a Microsoft Word document.
 - ▶ The resulting document may then be edited and saved for use in executing the overall record.
 - ▶ With the initiation of DocuSign (electronic signature), the Project Coordinator uses the Custom Print to create the DocuSign Document
- ▶ Print a copy of a Record (slides 7-9):
 - ▶ You can also print a copy of a record either directly to a printer or to a PDF document

Create Custom Print

- ▶ To begin, choose a record you want to use to create a custom print in Logs or Tasks.
- ▶ Click the gear icon  next to the record you want to use and then click Open



The screenshot displays the Oracle Primavera Unifier (Development) interface. The main window shows a table of contract records. A red box highlights the gear icon next to the record with Contract No. CCC-150000, and a red arrow points to the 'Open' option in the context menu that appears.

Contract No.	Contractor Name	Title
tef-01	R. W. Setterlin Building Company	test edit function
oci-143582987	R. W. Setterlin Building Company	Wednesday's Training
dps-090004-01-01	R. W. Setterlin Building Company	HVAC
CCC-150000	R. W. Setterlin Building Company	Test Controlling Board
	R. W. Setterlin Building Company	Test Controlling Board
	Amazing Architectural Inc.	Katie's Construction Company
	R. W. Setterlin Building Company	Joe's Contracting
	Harrison Planning Group	DPS Facility
	Amazing Architectural Inc.	ABC Construction
	Amazing Architectural Inc.	PO Test
	R. W. Setterlin Building Company	jim
	Amazing Architectural Inc.	123
	R. W. Setterlin Building Company	Morrison Building CO.
09	Harrison Planning Group	Morris
02	R. W. Setterlin Building Company	Test TJ

Create Custom Print

- ▶ When the record opens, click File -> Print Preview -> Custom

The screenshot shows a web browser window titled "Contract - test edit function - Project No. OCI-090004 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=171&model=uc1&fromcostlog=1&project_id=1021&nfi=0&__uref=uuu129:navigator-3. The "File" menu is open, and the "Print Preview" option is selected, which has opened a sub-menu where the "Custom ..." option is highlighted. A red arrow points to the "Custom ..." option. The main content area shows a contract record for "CON-0002" with an amount of \$80,000.00. The "WBS Detail" section shows a table with one item:

No.	WBS Code	Code Name	Short Description	Amount
001	CE-CE-SV	Contract Awarded SOV Pending	CMR SOV Pending	\$80,000.00

At the bottom of the page, there are links for "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Create Custom Print

- ▶ Select the format you want to print
- ▶ Click OK

The screenshot displays the Oracle Primavera Contract Modification K12 interface. A dialog box titled "Custom Format Print - Google Chrome" is open, showing a list of print formats. A red arrow points to the "GMP_Amendment_K12_CMR" format. The dialog also includes options for "Workflow Progress" and "Sort by". The "OK" button is circled in red.

Contract Modification K12 - Hammond Construction - GMP 2 - Project No. OCI-150041.02 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=23&model=ucmk&fromcostlog=1&project_

File Edit View Actions Help

Accept Task Decline Task SOV Close Window

Contract Modification K12

Custom Format Print - Google Chrome

<https://ohio-stage-unifier.oracleindustry.com/bp/studio/bp/selectPrintF>

Select a format to print

Title ▲

- GMP_Amendment_K12_CMR
- GMP_Amendment_K12_DB
- K12 Change Order 2015-JAN
- K12 Notice of Commencement
- K12-CLOUD CMR GMP Amendment 2016-JAN
- K12-CLOUD DB GMP Amendment 2016-JAN

Select options for Workflow Progress

All Steps

Visited Steps

Sort by:

OK Cancel

Transaction Currency ▼

Display 100 Items Per Page

LFI Percent	Subcontractor
0	

Total Amount: \$443,070.00

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

Create Custom Print

- ▶ Open the downloaded Word Document and save it to your computer
- ▶ Insert any necessary information into the places with **Blue** text

Document 00 53 23 - GMP Amendment (OSFC CM at Risk Project)
State of Ohio Standard Requirements for Public Facility Construction

Agreement Exhibit D

When preparing this GMP Amendment for execution, revise the text above from "Agreement Exhibit D" to "GMP Amendment No. N", where "N" is the sequential number of the GMP Amendment, and delete these notes.

The State of Ohio, acting by and through the President and Treasurer of the School District Board, and the CM enter into this Amendment as of the date set forth below to amend the Contract they entered into as of *<insert date of Agreement>* in connection with the Project known as:

Project Number:	OCI-150041.02
Project Name:	Brown - New K-12
School District Board ("Owner"):	Brown LSD
Contracting Authority:	The School District Board above in conjunction with the Ohio Facilities Construction Commission
Construction Manager ("CM"):	Hammond Construction, Inc.

ARTICLE 1 - CONTRACT SUM AND RELATED ITEMS FOR THIS AMENDMENT

1.1 The Contract Sum is \$443,070.00, which is the sum of the estimated Cost of the Work, plus the CM's Contingency, plus the CM's Fee as follows:

1.1.1 The estimated Cost of the Work is \$425,456.00, which includes all Allowances (if any) and Unit Prices (if any) defined through this Amendment, and is the sum of:

1.1.1.1 CM's Construction Stage Personnel Costs in the amount of \$11,226.00, which amount shall not exceed \$496,208.00;

1.1.1.2 General Conditions Costs in the amount of \$3,181.00, which shall not exceed \$233,013.00;

1.1.1.3 all Work the CM proposes to provide through Subcontractors in the amount of \$411,049.00;

1.1.1.4 all Work the CM proposes to self-perform directly or through a CM Affiliated Entity in the amount of \$0.00, which amount does not include any costs accounted for under the CM's Construction Stage Personnel Costs or General Conditions Costs.

1.1.2 The CM's Contingency in the amount of \$10,637.00, which shall not exceed 2.5 percent of the above-identified Cost of the Work.

1.1.2.1 Notwithstanding Article 9 of the General Conditions, the Contingency Review Dates will be the dates on which the CM achieves the following activities identified in the Construction Progress Schedule attached as GMP Exhibit E:

<insert activity number, activity name>
<insert activity number, activity name>
<insert activity number, activity name>

Delete Section 1.1.2.1 completely if it is not applicable.


1.1.3 The CM's Fee in the amount of \$56,977.00, which shall not exceed 1.6 percent of the sum of the above-identified Cost of the Work plus the above-identified CM's Contingency.

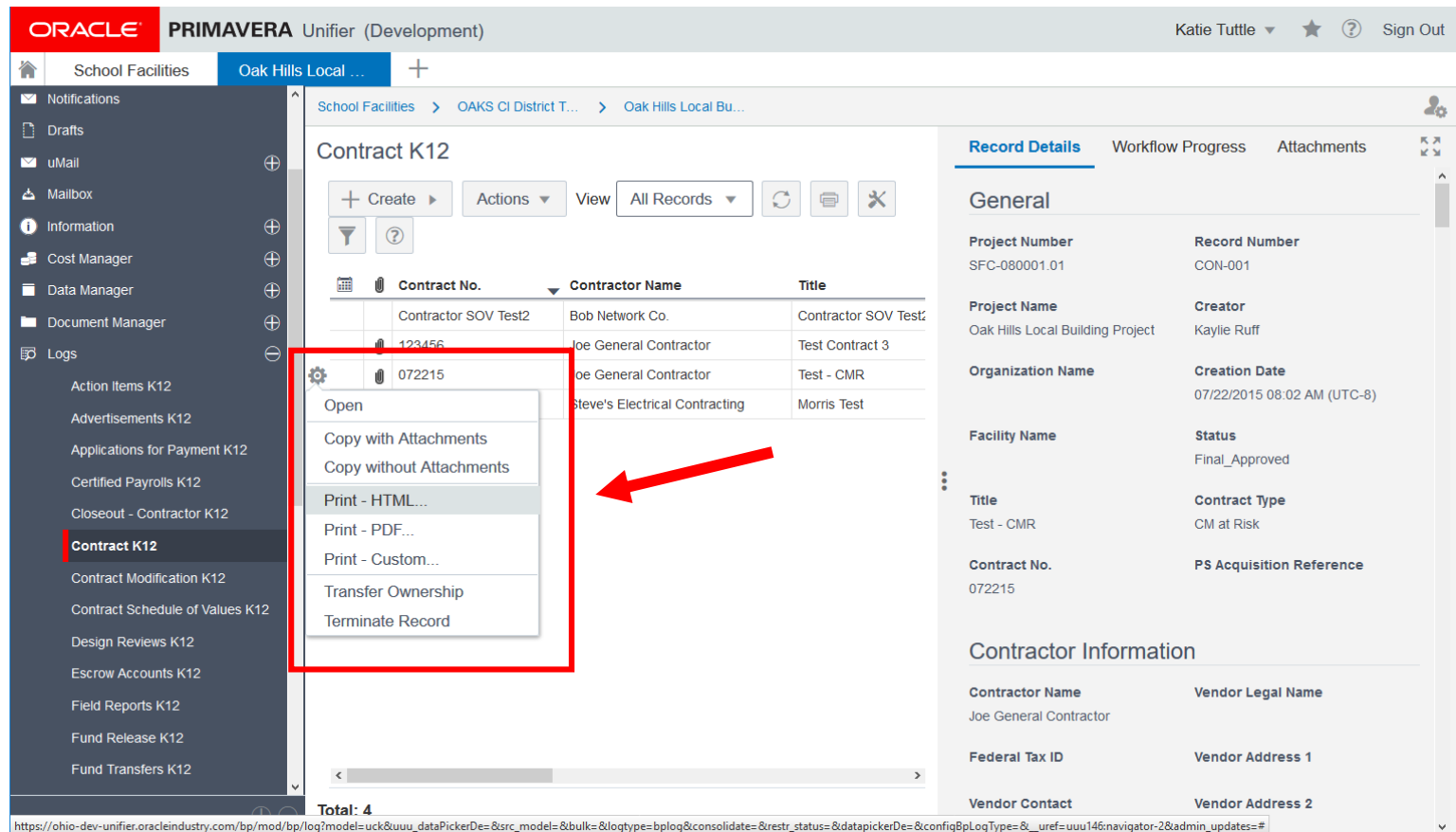
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Create Custom Print

- ▶ At this point, the next steps for the custom print depend on the type of record with which it is associated.
- ▶ Some custom prints are created by the Project Coordinator and serve as a DocuSign document.
- ▶ Other custom prints will need to be signed, scanned back into the computer, and attached to the OAKS CI record.
- ▶ For more specific information regarding the specific procedures for using custom prints, please discuss with your Project Manager, Project Coordinator, or OAKS CI Support Staff.

Print a Copy of a Record

- ▶ To begin, choose a record you want to print in Logs or Tasks.
- ▶ Click the gear icon  next to the record you want to use and then click Print- HTML or Print- PDF



The screenshot displays the Oracle Primavera Unifier interface. The main content area shows a table of contract records. A red box highlights the gear icon next to the record with Contract No. 072215, and a red arrow points to the 'Print - HTML...' option in the dropdown menu.

Contract No.	Contractor Name	Title
Contractor SOV Test2	Bob Network Co.	Contractor SOV Test2
123456	Joe General Contractor	Test Contract 3
072215	Joe General Contractor	Test - CMR
	Steve's Electrical Contracting	Morris Test

Record Details

General

Project Number SFC-080001.01	Record Number CON-001
Project Name Oak Hills Local Building Project	Creator Kaylie Ruff
Organization Name	Creation Date 07/22/2015 08:02 AM (UTC-8)
Facility Name	Status Final_Approved
Title Test - CMR	Contract Type CM at Risk
Contract No. 072215	PS Acquisition Reference

Contractor Information

Contractor Name Joe General Contractor	Vendor Legal Name
Federal Tax ID	Vendor Address 1
Vendor Contact	Vendor Address 2

Total: 4

https://ohio-dev-unifier.oracleindustry.com/bp/mod/bp/log?model=uck&uuu_dataPickerDee=&src_model=&bulk=&logtype=bplog&consolidate=&restr_status=&datapickerDee=&configBplLogType=&_uref=uuu146:navigator-2&admin_updates=#

Choose Print Options

- ▶ Select which items you wish to view on your print
- ▶ Click Print

Print Options ×

Show

Show All

Upper Form

Workflow Progress

All Steps

Visited Steps

Sort By

Completion ... ▼ Ascending ▼

Line Item List

General Comments

Record Attachments

Comments

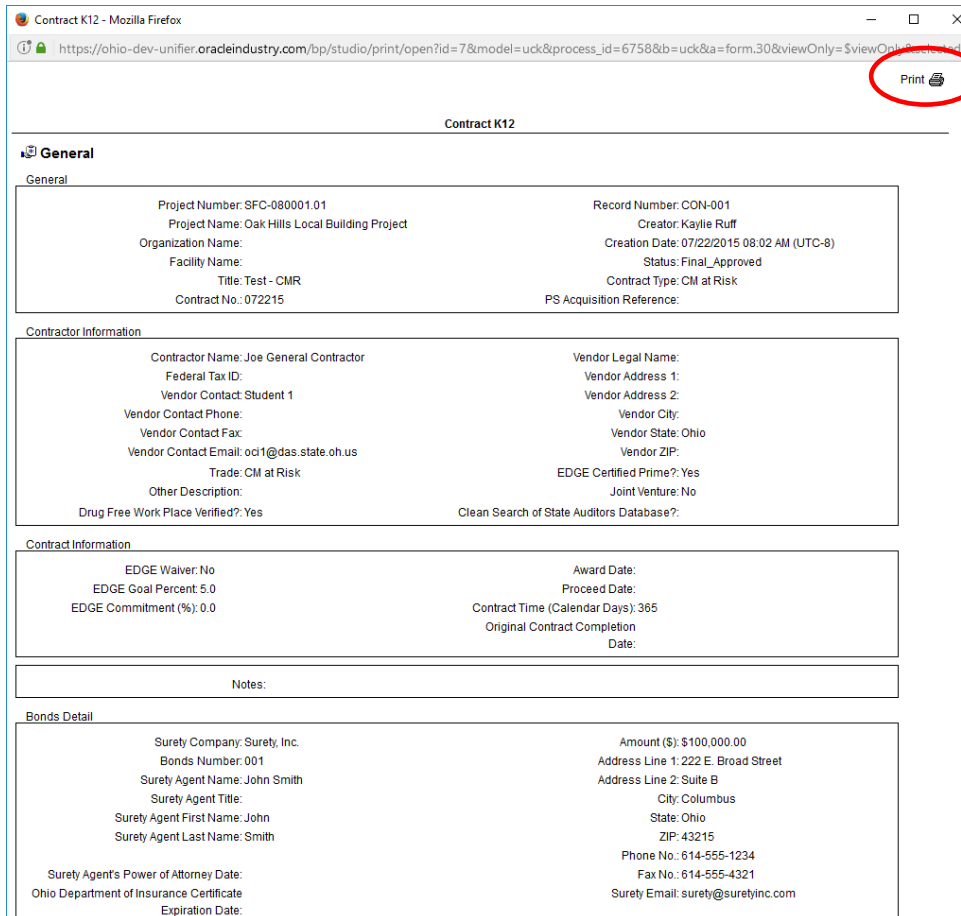
Line item detail Form

Attachments

Comments

Print a Record

- ▶ If you chose PDF, the file will download so you can open or save it
- ▶ If you chose HTML, you will see the screen below and you can print your document from here



Contract K12 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/studio/print/open?id=7&model=uck&process_id=7&model=uck&b=uck&a=form.30&viewOnly=\$viewOnly&record...

Print

Contract K12

General

Project Number: SFC-080001.01	Record Number: CON-001
Project Name: Oak Hills Local Building Project	Creator: Kayle Ruff
Organization Name:	Creation Date: 07/22/2015 08:02 AM (UTC-8)
Facility Name:	Status: Final_Approved
Title: Test - CMR	Contract Type: CM at Risk
Contract No.: 072215	PS Acquisition Reference:

Contractor Information

Contractor Name: Joe General Contractor	Vendor Legal Name:
Federal Tax ID:	Vendor Address 1:
Vendor Contact: Student 1	Vendor Address 2:
Vendor Contact Phone:	Vendor City:
Vendor Contact Fax:	Vendor State: Ohio
Vendor Contact Email: ocl1@das.state.oh.us	Vendor ZIP:
Trade: CM at Risk	EDGE Certified Prime?: Yes
Other Description:	Joint Venture: No
Drug Free Work Place Verified?: Yes	Clean Search of State Auditors Database?:

Contract Information

EDGE Waiver: No	Award Date:
EDGE Goal Percent: 5.0	Proceed Date:
EDGE Commitment (%): 0.0	Contract Time (Calendar Days): 365
	Original Contract Completion Date:

Notes:

Bonds Detail

Surety Company: Surety, Inc.	Amount (\$): \$100,000.00
Bonds Number: 001	Address Line 1: 222 E. Broad Street
Surety Agent Name: John Smith	Address Line 2: Suite B
Surety Agent Title:	City: Columbus
Surety Agent First Name: John	State: Ohio
Surety Agent Last Name: Smith	ZIP: 43215
	Phone No.: 614-555-1234
Surety Agents Power of Attorney Date:	Fax No.: 614-555-4321
Ohio Department of Insurance Certificate	Surety Email: surety@suretyinc.com
Expiration Date:	

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211