



# Uploading Documents

## Agency/Higher-Ed

# About Document Manager

- ▶ Document Manager houses all of your supporting documentation
- ▶ All documents must be uploaded into Document Manager first before they can be attached to a record
- ▶ Provides a platform for maintaining a wide variety of files and documents
- ▶ Ensures that project participants are always working on the most current versions
- ▶ Provides ready access to all documents from anywhere at any time

# Browser Information

- ▶ When using the OAKS CI system, we recommend using **Google Chrome** or **Mozilla Firefox**. These browsers will give you the best user experience in the system.



# Document Upload

- ▶ Navigate to Document Manager
- ▶ Click on Documents

**Choose folder**

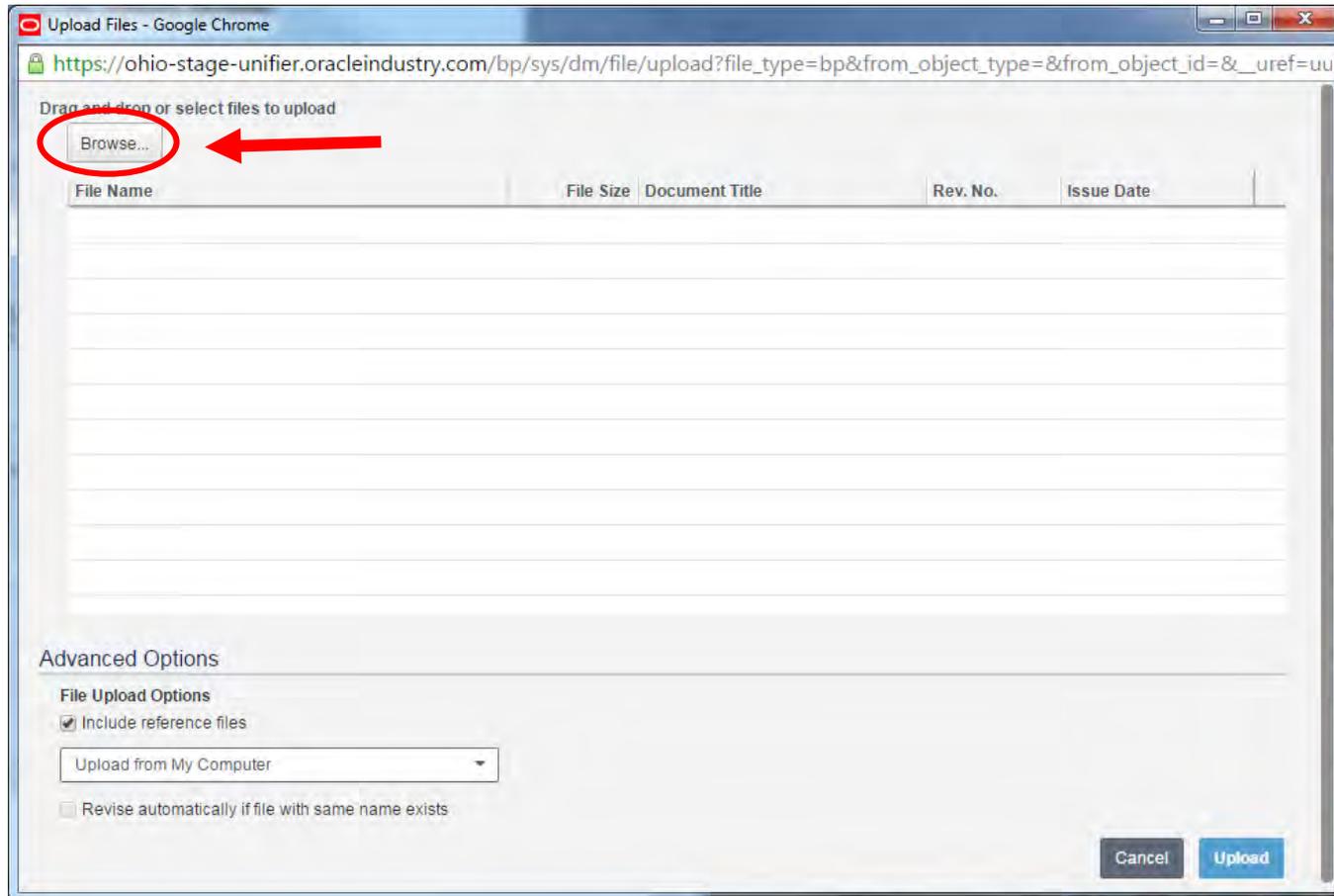
**Click Upload**

**Note: Always navigate and choose upload folder using the middle pane**

| Ref. | BP | Name                | Size | Upload Date | Owner        | Title | Rev.No. |
|------|----|---------------------|------|-------------|--------------|-------|---------|
|      |    | 9.18.11-12.17.11.bt | 2 KB | 08/14/2012  | Shauna Hooks |       |         |
|      |    | IMG_1153.JPG        | 3 MB | 03/17/2014  | Shauna Hooks |       |         |

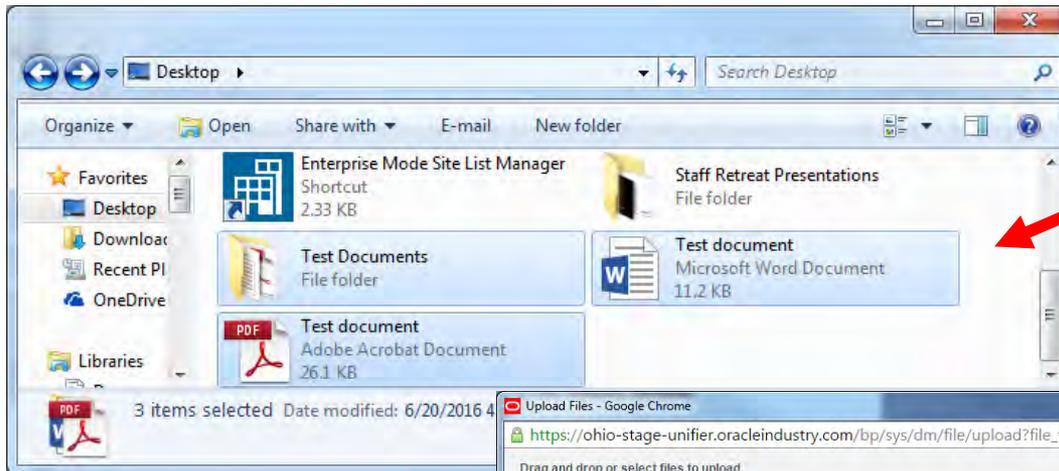
# File Upload Window

- ▶ A new window will appear for you to add files
- ▶ Click Browse to choose files for upload



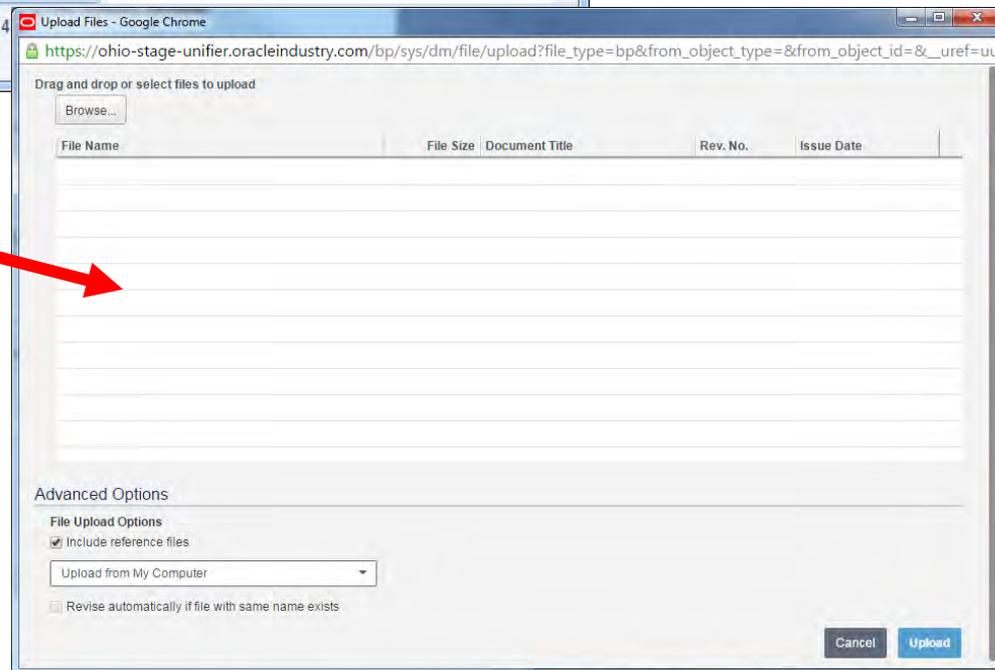
# Drag and Drop files

- ▶ Find the folders and/or files your computer you want to upload
- ▶ Drag and Drop the documents into the Upload Files window



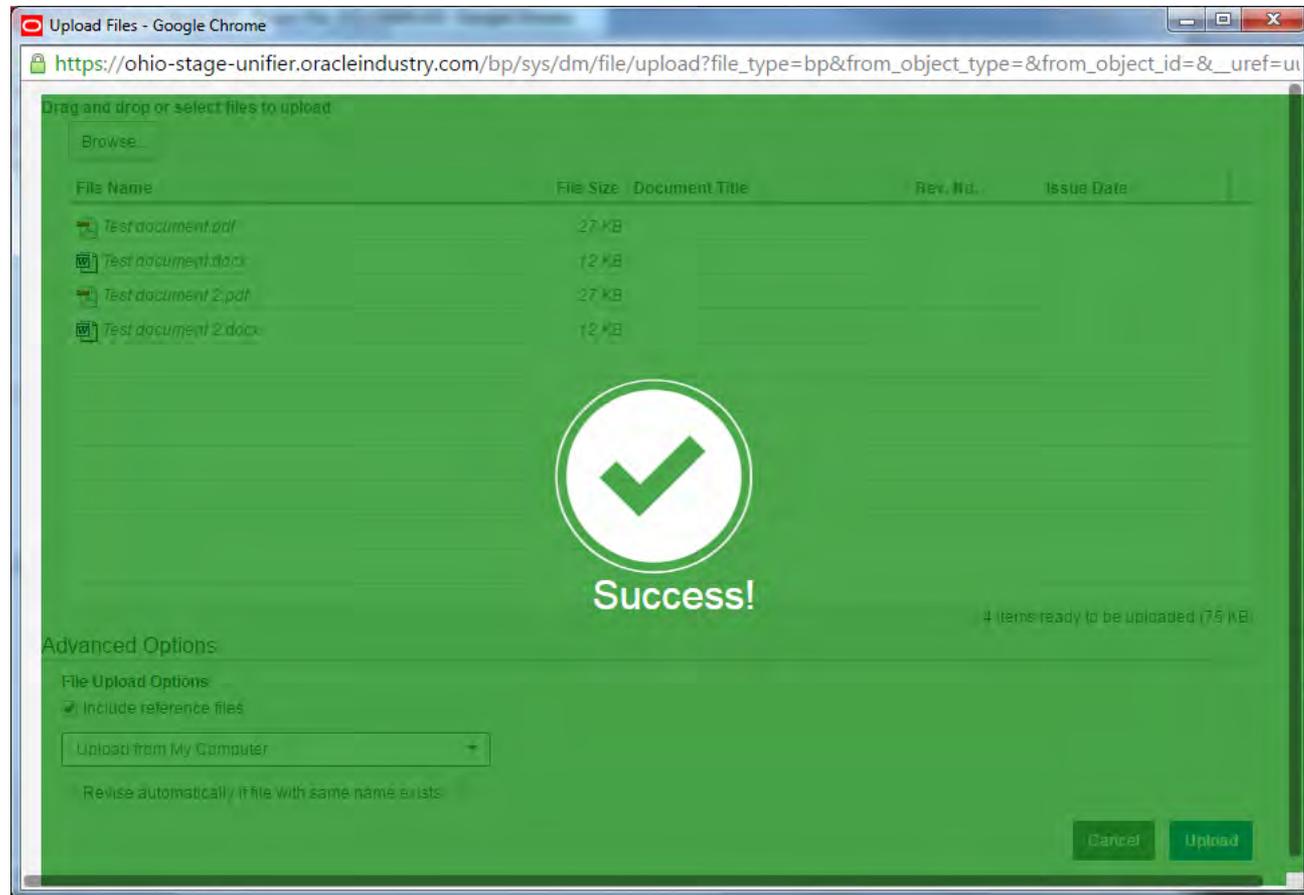
Choose your folder of Documents or Select Multiple Documents

Drag and Drop the documents into the Upload Files window



# Adding Documents

- ▶ If all folders and files have been added, you will see a green “Success!” screen



# Upload Documents

- ▶ You should see all of your documents in the Upload Files window
- ▶ Click Upload button

Upload Files - Google Chrome

[https://ohio-stage-unifier.oracleindustry.com/bp/sys/dm/file/upload?file\\_type=bp&from\\_object\\_type=&from\\_object\\_id=&\\_uref=ul](https://ohio-stage-unifier.oracleindustry.com/bp/sys/dm/file/upload?file_type=bp&from_object_type=&from_object_id=&_uref=ul)

Drag and drop or select files to upload

Browse...

| File Name            | File Size | Document Title | Rev. No. | Issue Date |
|----------------------|-----------|----------------|----------|------------|
| Test document.pdf    | 27 KB     |                |          |            |
| Test document.docx   | 12 KB     |                |          |            |
| Test document 2.pdf  | 27 KB     |                |          |            |
| Test document 2.docx | 12 KB     |                |          |            |

4 items ready to be uploaded (75 KB)

Advanced Options

File Upload Options

Include reference files

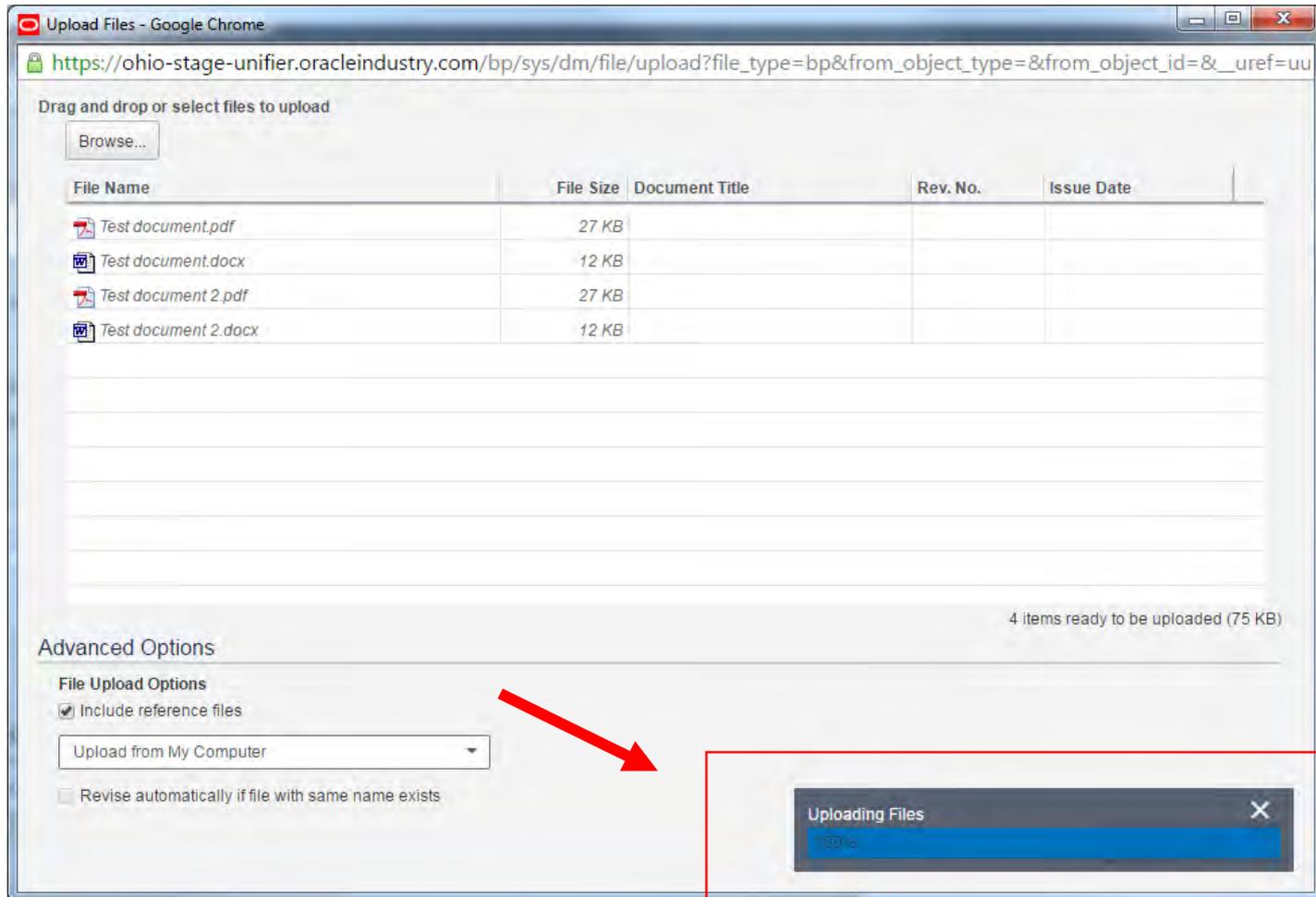
Upload from My Computer

Revise automatically if file with same name exists

Cancel Upload

# Upload Documents

- ▶ When all documents have finished uploading, you will see a 100% bar at the bottom of the screen



# View Documents

- ▶ Now that your documents have been uploaded into Document Manager they can be attached to Records

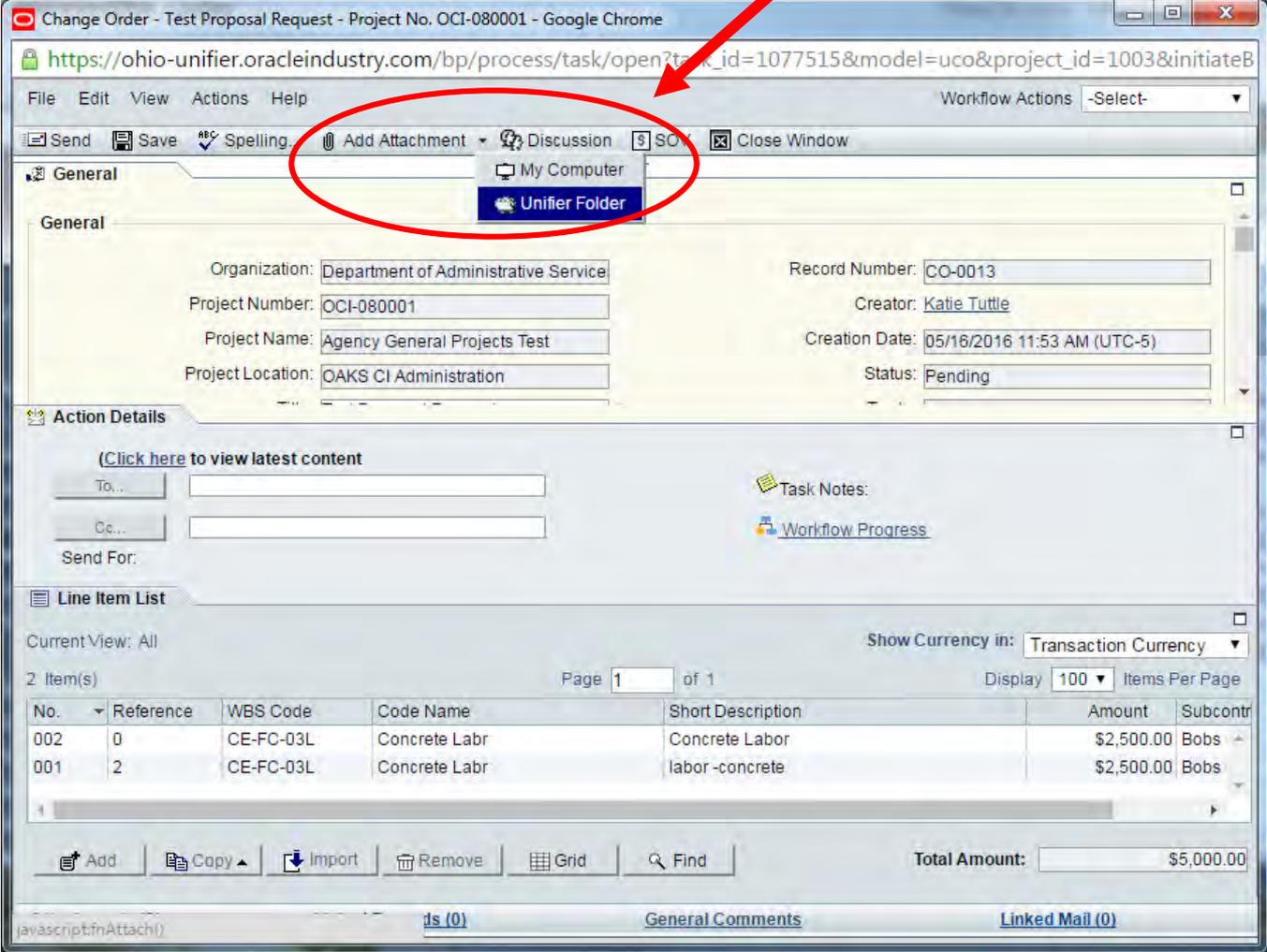
The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Proxy for Katie Tuttle'. The breadcrumb trail is 'Agency > OAKS CI Adm... > Agency Genera...'. The left sidebar contains a navigation menu with 'Documents' selected. The main content area shows a file tree with '0315 RFI' selected, displaying a list of documents:

| Ref. | BP | Name                 | Size  | Upload Date | Owner        | Title |
|------|----|----------------------|-------|-------------|--------------|-------|
|      |    | 9.18.11-12.17.11.txt | 2 KB  | 08/14/2012  | Shauna Hooks |       |
|      |    | IMG_1153.JPG         | 3 MB  | 03/17/2014  | Shauna Hooks |       |
|      |    | Test document 2.docx | 12 KB | 06/21/2016  | Katie Tuttle |       |
|      |    | Test document 2.pdf  | 27 KB | 06/21/2016  | Katie Tuttle |       |
|      |    | Test document.docx   | 12 KB | 06/21/2016  | Katie Tuttle |       |
|      |    | Test document.pdf    | 27 KB | 06/21/2016  | Katie Tuttle |       |

A red arrow points to the document list with a text box that says "You should see your documents here".

# Attach Documents to your Record

- ▶ To attach documents to your record, click Add Attachment and choose **Unifier Folder**



The screenshot shows a web browser window with the URL [https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\\_id=1077515&model=uco&project\\_id=1003&initiateB](https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1077515&model=uco&project_id=1003&initiateB). The browser's menu bar includes File, Edit, View, Actions, and Help. The application's menu bar includes Send, Save, Spelling, Add Attachment, Discussion, and Close Window. The 'Add Attachment' button is circled in red, and a red arrow points to the 'Unifier Folder' option in its dropdown menu. The main content area is divided into sections: General, Action Details, and Line Item List.

**General**

Organization: Department of Administrative Service  
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)  
Status: Pending

**Action Details**

(Click here to view latest content)

To...  
Cc...  
Send For:

Task Notes:  
Workflow Progress

**Line Item List**

Current View: All  
Show Currency in: Transaction Currency

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

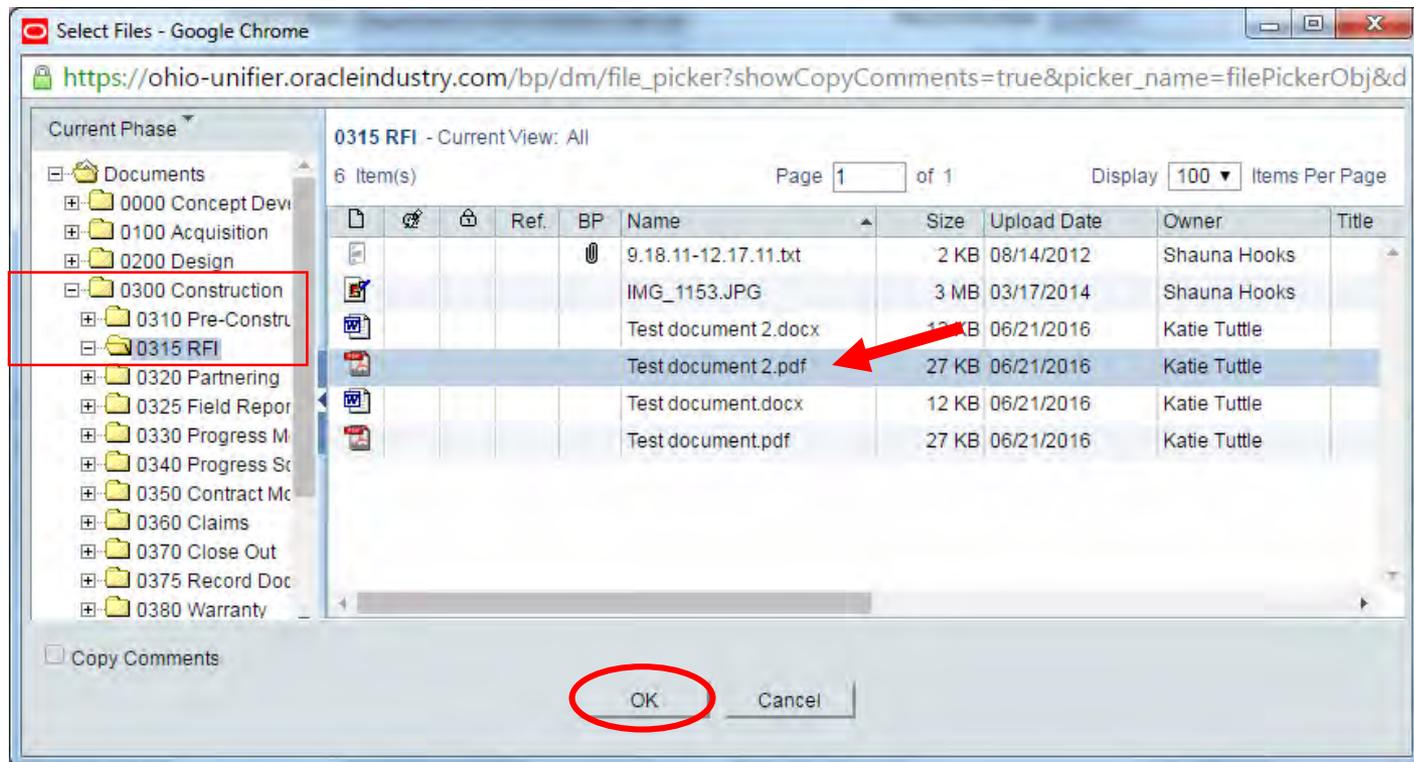
| No. | Reference | WBS Code  | Code Name     | Short Description | Amount     | Subcontr |
|-----|-----------|-----------|---------------|-------------------|------------|----------|
| 002 | 0         | CE-FC-03L | Concrete Labr | Concrete Labor    | \$2,500.00 | Bobs     |
| 001 | 2         | CE-FC-03L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

Total Amount: \$5,000.00

(javascript:fnAttach()) ds (0) General Comments Linked Mail (0)

# Attach Documents to your Record

- ▶ Choose the folder on the left where your documents are saved
- ▶ Select your document on the right
- ▶ Click OK



# View Attachments

- ▶ You can view the attachments at the bottom of your record

The screenshot shows the Oracle Change Order interface in a Google Chrome browser. The browser title is "Change Order - Test Proposal Request - Project No. OCI-080001 - Google Chrome". The URL is [https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\\_id=1077515&model=uco&project\\_id=1003&initiateB](https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1077515&model=uco&project_id=1003&initiateB). The interface has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with icons for "Send", "Save", "Spelling..", "Add Attachment", "Discussion", "SOV", and "Close Window". The main content area is divided into several sections:

- General**: Contains fields for Organization (Department of Administrative Service), 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).
- Action Details**: Includes a link "(Click here to view latest content)", "To..." and "Cc..." input fields, and "Send For:".
- Line Item List**: Shows a table with 2 items. The table has columns: No., Reference, WBS Code, Code Name, Short Description, Amount, and Subcontr. The items are: 002 (Reference 0, WBS Code CE-FC-03L, Code Name Concrete Labr, Short Description Concrete Labor, Amount \$2,500.00, Subcontr Bobs) and 001 (Reference 2, WBS Code CE-FC-03L, Code Name Concrete Labr, Short Description labor-concrete, Amount \$2,500.00, Subcontr Bobs). The total amount is \$5,000.00.
- Attachments (1)**: This section is highlighted with a red box and a red arrow. It contains a link to view attachments.
- Linked Records (0)**: A link to view linked records.
- General Comments**: A link to view general comments.
- Linked Mail (0)**: A link to view linked mail.

# Questions?

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