



# Introduction to OAKS CI

# 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.



# Job Aids

- ▶ For additional reference materials visit our website [ofcc.ohio.gov](http://ofcc.ohio.gov)
- ▶ Click: OAKS CI -> Choose an Appropriate training

The screenshot shows the OFCC (Ohio Facilities Construction Commission) website. The browser address bar displays [ofcc.ohio.gov/OAKSCI.aspx](http://ofcc.ohio.gov/OAKSCI.aspx). The main navigation menu includes 'About', 'Documents', 'Services / Programs', 'News / Events', 'Opportunities', 'OAKS CI', 'Resources', and 'Gallery'. The 'OAKS CI' menu item is circled in red, with a red arrow pointing to it. Below the navigation, a breadcrumb trail indicates 'You are here : OAKS CI'. The main content area is titled 'OAKS Capital Improvements (OAKS CI)' and provides a brief description. Below this, there are three columns of options: 'Agency/Higher Ed', 'K-12 Cloud System', and 'K-12 Legacy System'. Each column contains two buttons: 'User Login' and 'Training'. A red box highlights the 'Agency/Higher Ed Training' button, with a red arrow pointing to it from the left. At the bottom, there is a 'Contacts & Forms' section with contact information for OAKS CI Support and a list of forms and resources.

# What does OAKS CI do for you?

- ▶ Tracks your project progress
- ▶ Automates workflows (based on Ohio Facilities Construction Commission forms and procedures)
- ▶ Allows for improved project communication and collaboration
- ▶ Housed in the Cloud so you can utilize any browsing tool to access
- ▶ Now includes DocuSign which minimizes time spent in OAKS CI

# Using OAKS CI in the Cloud

## – Important Links

- ▶ OAKS CI is now housed in a cloud-based system at the following URL:
  - <https://ohio-unifier.oracleindustry.com/bluedoor>
- ▶ Passwords for OAKS CI are now housed in a separate system called Oracle Identity Manager (OIM) which can be accessed here:
  - <https://ohio-primavera-idm.oracleindustry.com/oim>

# Oracle Identity Manager (OIM)

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



ORACLE®  
PRIMAVERA

v05286562

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Sign In [Forgot Password](#)

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# 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
- ▶ Please be aware that your password will expire **every 60 days** and the system **will not** send you a reminder.
- ▶ Type in requested information and Click “Submit”. Then Click “Sign Out” to log out of OIM

File Edit View Favorites Tools Help  
x Convert Select

**ORACLE** Identity Self Service

**Password Management**

Please reset your password.

\* Old Password

\* New Password

\* Re-Type New Password

Register challenge questions for your account

\* Question1  \* Answer1

\* Question2  \* Answer2

\* Question3  \* Answer3

Submit

Old Password = Your current account password  
New Password = A brand new password that you choose

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

# Navigating OAKS CI in the Cloud

# 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/bluedoor>
- ▶ Enter your assigned Username and Password
- ▶ Click “Sign In”

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

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.....

Sign In      Forgot Password

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# Cross Project Home Page

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle' with a 'Sign Out' link. Below this is a browser-style tab bar with tabs for 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. A red arrow points to these tabs with the label 'Cross project tabs'. The main content area is divided into several sections: a left sidebar with navigation options like 'Home', 'Tasks', 'Messages', 'Drafts', 'uMail', and 'Master Log - Business Proces...'; a central 'Announcements' section with two items: 'Unifier Upgrade to v16.1' and 'Draft Pay Request Issue'; and a right sidebar titled 'Items Requiring Your Attention' showing counts for 'Tasks: 19 Total, 4 New, 5 Late', 'Messages: 3 New', 'Draft Records: 22 New', and 'uMails: 0 New'. A red arrow points to the 'Announcements' section with the label 'Announcements'. Below the announcements is a table titled 'Tasks or New uMails:' with columns for 'Project Number', 'Name', 'Tasks', 'uMails', and 'Company Name'. A red arrow points to the table with the label 'Projects with Active Tasks'. The table contains one row of data:

Project Number	Name	Tasks	uMails	Company Name
OCI-080001	Agency General Projects Test	19 Total, 4 New, 5 Late		State of Ohio

# Locating your Organization or Project

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle' with a star icon, a help icon, and a 'Sign Out' link. Below the navigation bar, there are several tabs: 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. A search bar contains the text 'DNR'. A red box highlights the search bar, and a red arrow points from the search bar to the search results. The search results are displayed in a table under the heading 'Matched Locations'. The table lists various projects with their IDs and descriptions. A 'Key Locations' section is visible below the search results. On the right side of the screen, there is a 'Your Attention:' section with a '4 New, 5 Late' notification and a '22 New' notification.

Matched Locations	Project ID	Project Name	Agency
	DNR-140070 South	State Park Cottage Renovation - South	/Agency/Department of Natural Resources
	DNR-140071-South	State Park Campgrounds Renovation-South	/Agency/Department of Natural Resources
	DNR-140059	Punderson Manor Electrical and HVAC Upgrades	/Agency/Department of Natural Resources
	DNR-140072	Little Miami Trail Restoration	/Agency/Department of Natural Resources
	DNR-150005	Punderson SP Water System Improvements	/Agency/Department of Natural Resources
	DNR-150007	Hueston Woods SP Wastewater System Improvements Phas...	/Agency/Department of Natural Resources
	DNR-150031	DNR Mine Training Facility	/Agency/Department of Natural Resources
	DNR-150050	Hocking Hills Roof Replacement and Pool Repairs	/Agency/Department of Natural Resources
	DNR-150055	Mohican Lodge Roof & Ext. Renovations	/Agency/Department of Natural Resources
	DNR-090020	Lonz Winery Renovations	/Agency/Department of Natural Resources

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

# Project Home Page

ORACLE PRIMAVERA Unifier

Katie Tuttle Sign Out

Home Agency General... Campus Resear... Northcoast Beh... +

Navigate To... Agency OAKS CI Adm... Agency Genera..

User Admin

Agency General Projects Tes...

Alerts

uMail

Collaboration

Information

Cost Manager

Data Manager

Document Manager

Logs

Reports

File Edit View Help

Agency General Projects Test - Home

Summary

Image

Items

Tasks

Mess

Draft

uMai

Links

OAKS

Details

Map View

Details

Project Number:	OCI-080001
Project Name:	Agency General Projects Test
Description:	Test Area for Agency General Projects
Administrator:	Steve Mayo
Currency:	United States Dollar (USD)

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!

The screenshot displays the Oracle Primavera Unifier web application interface. The top navigation bar includes the Oracle logo, the text "PRIMAVERA Unifier", the user name "Katie Tuttle", and a "Sign Out" link. Below this is a breadcrumb trail: "Home > Agency General... > Campus Resear... > Northcoast Beh...". The main content area is titled "Agency General Projects Test - Home" and includes a "View Dashboard" button and a "My Dashboard" dropdown menu. A left-hand navigation menu is visible, with the "Collaboration" option highlighted by a red arrow. A red-bordered callout box points to the "Collaboration" menu item and contains the following text:

Collaboration houses:

- Tasks
- Messages
- Drafts

The main content area also features a "Summary" tab, an "Image" placeholder, and a section titled "Items Requiring Your Attention" with the following data:

Item Type	Count	Status
Tasks	19	New 4, Late 5
Messages	2	New
Draft Records	22	New
uMails	0	New

At the bottom, a "Details" section provides project information:

Project Number:	OCI-080001
Project Name:	Agency General Projects Test
Description:	Test Area for Agency General Projects
Administrator:	Steve Mayo
Currency:	United States Dollar (USD)

# Tasks (Your Records)

**ORACLE** PRIMAVERA Unifier Katie Tuttle ★ ? Sign Out

Home Agency General... Campus Resear... Northcoast Beh... +

Navigate To... Agency OAKS CI Adm... Agency Genera...

User Admin

Agency General Projects Test... Alerts uMail Collaboration **Tasks** Messages Drafts Information Cost Manager Data Manager Document Manager Logs Reports

File Edit View Help

New Open Bulk Actions Find Filtered By

Tasks - Current View: All

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

Type	Number	Title	Record Due	From	Sent for
Contractor Pay Request	CPR-0011	PR-004 Test		Katie Tuttle,soo	Paymer
Professional Services Agreements	Agree-0014	Agreement #3		Katie Tuttle,soo	Acknow
Professional Services Agreements	Agree-0013	Test Agreement #2		Katie Tuttle,soo	Update
Change Order	CO-0013	Test Proposal Req		Katie Tuttle,soo	AE Rev
Contract	CON-0002	C Test		Rita Nichols, soo	Notice
Design Reviews	DR-0005			Katie Tuttle,soo	Update
Request for Interpretations	RFI-00010	Request #1		Katie Tuttle,soo	Respor
	SSD-0009	Consultant SMSD		Katie Tuttle,soo	Declar
	RFI-00009	RFI Test 8		Katie Tuttle,soo	Respor
	SUB-0016	Test Submittal		Katie Tuttle,soo	Associa
Professional Services Amendments	Amend-0005	Amendment #1		Katie Tuttle,soo	Amend
Request for Interpretations	RFI-00008	RFI Test 5		Katie Tuttle,soo	Respor
Professional Services Pay Request	PSPR-0008	Tuesday Test		Katie Tuttle,soo	Paymer
Action Items	AI-00018	test action item	10/12/2015	Katie Tuttle,soo	Delega

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

# Messages

ORACLE PRIMAVERA Unifier

Katie Tuttle Sign Out

Home Agency General... Campus Resear... Northcoast Beh...

Navigate To... Agency OAKS CI Adm... Agency Genera..

User Admin

Agency General Projects Test... Alerts uMail Collaboration Tasks Messages DRAFTS Information Cost Manager Data Manager Document Manager Logs Reports

File Edit View Help

New Open Find Delete

Messages - Current View: All

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

Type	From	Subject	Received Date
Meeting Minutes	Katie Tuttle,soo	MM-0006: Meeting Minute Message	04/27/2016
Meeting Minutes	Katie Tuttle,soo	MM-0005: Test Meeting Minute	03/17/2016

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

# Drafts

The screenshot shows the Oracle Primavera Unifier web application interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and user information 'Katie Tuttle' with a star icon and a help icon. Below the navigation bar, there are several tabs: 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. A breadcrumb trail shows the current location: 'Agency > OAKS CI Adm... > Agency Genera...'. The main content area is titled 'Drafts - Current View: All' and shows 22 items. A table lists the draft records with columns for Type, Number, Title, Last Saved, and Discussion. A red arrow points from the 'Drafts' menu item in the left sidebar to the table. A red-bordered box contains the text 'Drafts: Unfinished records you have created and saved'.

Type	Number	Title	Last Saved	Discussion
Contractor Pay Reque	CPR-0011	PR-004 Test	06/16/2016	
Request for Interpretat		request to test	06/08/2016	
Action Items		test for draft notification	06/08/2016	
Contract	CON-0002	C Test	05/16/2016	
Meeting Minutes		Meeting Minute Test	01/13/2016	
Professional Services		Test 4	01/13/2016	
Subcontractor/Supplie		Jeremy's Consulting	01/13/2016	
Contract		Test	12/23/2015	
Action Items			11/03/2015	
Contract Schem			10/30/2015	
Professional Ser			10/14/2015	
Contractor Pay Reque			10/13/2015	
Contractor Pay Reque		Test 1	10/06/2015	
Contractor Pay Reque			10/05/2015	
Change Order		Test	10/05/2015	
Design Reviews			09/21/2015	

# 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

A screenshot of the OAKS CI application interface. The window title is "Applications for Payment K12". The menu bar includes "File", "Edit", "View", "Actions", and "Help". The toolbar contains "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The "Save" button is circled in red. The main content area is divided into sections: "General" (with fields for Project Name, Project Number, Record Number, and Creator), "Action Details" (with "To..." and "Cc..." fields), and "Pay Request Details" (with a table and "Add", "Copy", "Import", "Remove", "Find" buttons). The "General Comments" link at the bottom is also circled in red.

Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you're typing extensive notes, first type them in a Word doc then copy and paste into General Comments

# 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.

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

The screenshot displays the Oracle Primavera Unifier application interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier'. Below this, there are tabs for 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. A search bar labeled 'Navigate To...' is visible. The left sidebar contains a navigation menu with categories like 'User', 'Admin', and 'Agency General Projects Te...'. The 'Logs' category is expanded, showing a list of record types such as '72 Hour Notice', 'Action Items', 'Advertisements', 'Budget - Initial', 'Budget - Revisions', 'Change Order', 'Closeout - Contractor', 'Closeout - Professional S...', 'Contract', 'Contract Schedule of Valu...', 'Contractor Evaluation', 'Contractor Pay Request', 'Design Reviews', 'Escrow Accounts', 'Field Reports', 'Financial Risks', 'Fund Allocation', 'Fund Release', 'Fund Transfers', 'Liens', 'Local Administration Auth...', 'Meeting Minutes', and 'Memorandum of Underst...'. The 'Action Items' record type is selected and highlighted. The main content area shows a table of 'Action Items' with columns for 'Record No.', 'Title', and 'Assignee'. The table contains 20 items, with the following data:

Record No.	Title	Assignee
AI-00020	Test action item 2	Katie Tuttle
AI-00019	Training Action Item	Katie Tuttle
AI-00018	test action item	Shauna Hooks
AI-00017	Action Item Test	
AI-00016	Notification Test	
AI-00015	Title #1	Sara Freetage
AI-00014	test	
AI-00013	asdf	
AI-00012	test	
AI-00011	CPR #1 Anderson Plumbing	
AI-00010	Demo 1	Craig W
AI-00009	Time is 4:07	
AI-00008	test time	
AI-00007	-	
AI-00006	test	
AI-00005	test	
AI-00004	Test 1/2/09 v1.1 Update	Steve
AI-00003	Test 11/22 Help File	
AI-00002	Remove Login Message re V9.0	Fred
AI-00001	Test AI	

# How do Records Work?



# Create a Record

- ▶ In Logs, navigate to the record type you wish to create
- ▶ Click New

The screenshot displays the Oracle Primavera Unifier web application interface. The top navigation bar includes the Oracle logo, the product name 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. Below this is a breadcrumb trail: 'Home > Agency General... > Campus Resear... > Northcoast Beh...'. A search bar labeled 'Navigate To...' is present. The main interface is divided into a left sidebar and a main content area. The sidebar, under the 'User' tab, lists various modules: Agency General Projects Te..., Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, 72 Hour Notice, Action Items, Advertisements, Budget - Initial, Budget - Revisions, and Change Order. The 'Logs' module is circled in red, with a red arrow pointing to it from the left. The main content area shows a menu bar with 'File', 'Edit', 'New', and 'Help'. The 'New' button is circled in red, with a red arrow pointing to it from above. Below the menu bar, there is a section for 'Action Items - Current View: All' with a page indicator 'Page 1 of 1' and '20 Item(s)'. A table of action items is displayed with columns for Record No, Title, Assignee, Due Date, and Priority.

Record No	Title	Assignee	Due Date	Prior
AI-00020	Test action item 2	Katie Tuttle	10/13/2015	Medi
AI-00019	Training Action Item	Katie Tuttle	10/13/2015	Medi
AI-00018	test action item	Shauna Hooks	10/12/2015	Medi
AI-00017	Action Item Test		10/01/2015	Medi
AI-00016	Notification Test		06/09/2015	Lo
AI-00015	Title #1	Sara Freetage	08/13/2013	Hig
AI-00014	test		02/27/2013	Hig
AI-00013	asdf		02/27/2013	Loy
AI-00012	test		12/07/2012	Loy
AI-00011	CPR #1 Anderson Plumbing		09/20/2012	Hig
AI-00010	Demo 1	Craig W	08/06/2012	Loy
AI-00009	Time is 4:07		06/05/2012	Loy
AI-00008	test time		06/01/2012	
AI-00007	*		05/29/2012	
AI-00006	test		05/29/2012	

# Add Information

- ▶ Fill out all required information in the General Tab
  - ▶ Required information is marked with a red \*
- ▶ Attach any necessary documentation

Create New Action Items - Project No. OCI-080001 - Google Chrome

[https://ohio-unifier.oracleindustry.com/bp/process/new?project\\_id=1003&module\\_name=uai&csvimport=false](https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=uai&csvimport=false)

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add Attachment Close Window

Action Items Action Items

**General**

Organization: Department of Administrative Services Record Number:

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: Agency General Projects Test Creation Date:

Project Location: OAKS CI Administration

Title: Test Action Item \* Status:

Assignee: Bob Smith Priority: High

Meeting Minute:  Select... Due Date: 11/10/2015 05:27 AM (UTC-8) \*

Action

Action Requested: Please review the attached documents \*

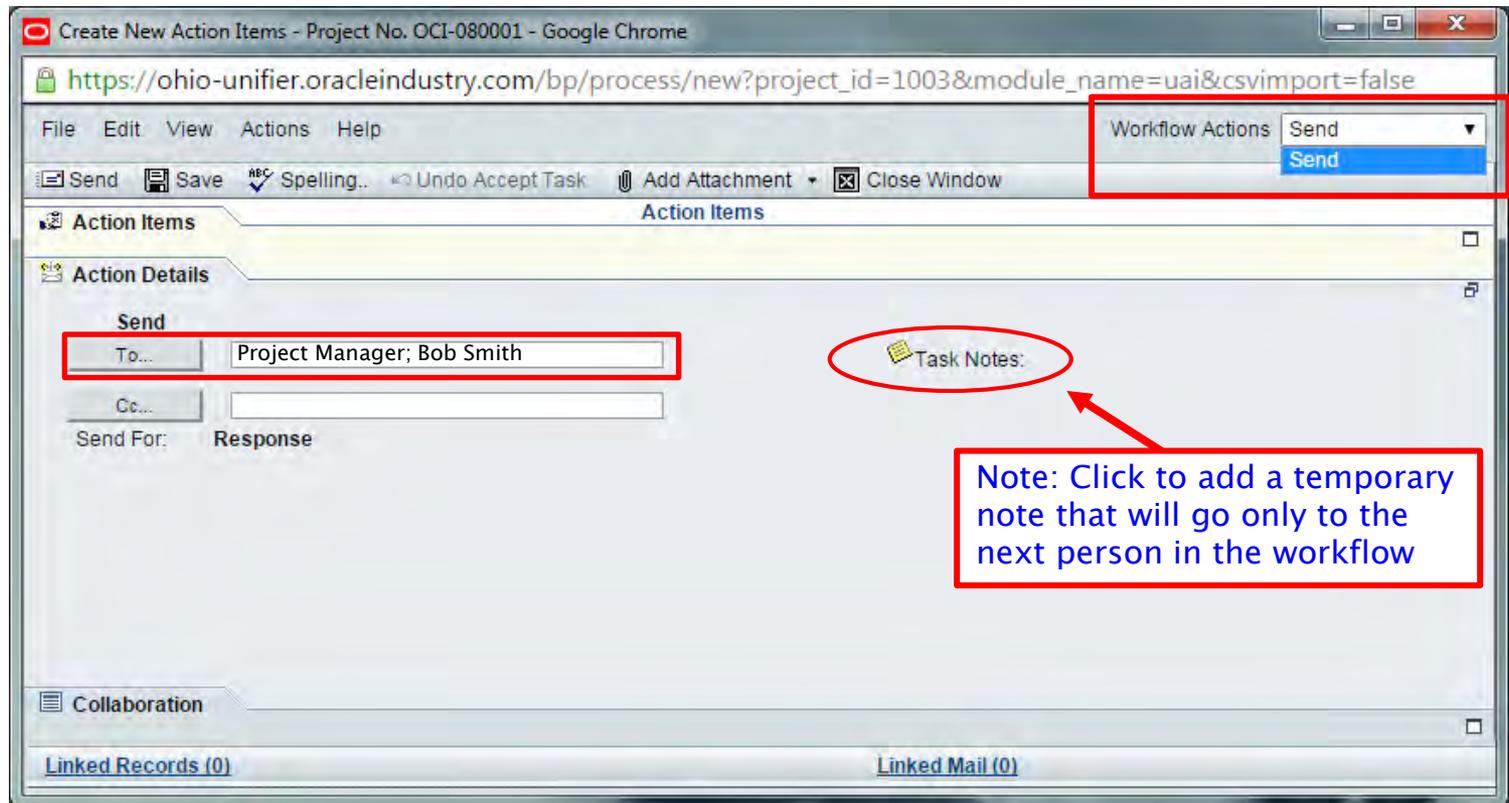
Action Details

Collaboration

[Linked Records \(0\)](#) [Linked Mail \(0\)](#)

# Send the Record

- ▶ Choose a Workflow Action
- ▶ Click Send



**This record is now going to be Bob Smith's TASK**

# Working with Tasks



# Receive an Email

The screenshot shows an email client window titled "Change Order CO-0013 is sent to you for PM Review: - Message (HTML)". The interface includes a menu bar with "File", "Message", and "McAfee E-mail Scan". Below the menu is a toolbar with various actions like "Delete", "Reply", "Forward", "Move", and "Zoom". The email header shows it was received on "Sun 6/19/2016 3:51 PM" from "Unifier - Katie Tuttle, SOO <unifier\_notifications@oracle.com>". The subject line is "Change Order CO-0013 is sent to you for PM Review." The recipient is listed as "Tuttle, Katie". A note below the header says "If there are problems with how this message is displayed, click here to view it in a web browser." The main body of the email contains the following text:

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: Agency General Projects Test**

**Change Order CO-0013 is sent to you for PM Review.**

The text "Change Order CO-0013 is sent to you for PM Review." is highlighted with a red rectangular box, and a red arrow points to it from the right side of the image.

From : **Katie Tuttle**  
Sent For : **PM Review**

Source Name : **Agency General Projects Test**  
Record No : **Change Order CO-0013**  
Title : **Test Proposal Request**

Unifier Login

For Oracle technical assistance <http://www.oracle.com/us/support>

# Reviewing a Task

The screenshot shows the Oracle Primavera Unifier interface. The top bar includes the Oracle logo, 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The breadcrumb trail is 'Agency > OAKS CI Adm... > Agency Genera...'. The left sidebar contains a navigation menu with 'User' and 'Admin' sections. The 'Tasks' menu item is circled in red. The main window displays a table of tasks with columns for Type, Number, and other details. A red box highlights the 'Change Order' task (CO-0013) with the text 'Choose the task you need to review and double click to open'. An arrow points from this box to the 'Change Order' row in the table.

Type	Number				Items Per Page
Contractor Pay Request	CPR-0011				
Professional Services Agreements	Agree-0014	Agreement #3		Katie Tuttle,soo	Ackno
Professional Services Agreements	Agree-0013	Test Agreement #2		Katie Tuttle,soo	Update
Change Order	CO-0013	Test Proposal Reqi		Katie Tuttle,soo	AE Re
Contract	CON-0002	C Test		Rita Nichols, soo	Notice
Design Reviews	DR-0005			Katie Tuttle,soo	Update
Request for Interpretations	RFI-00010	Request #1		Katie Tuttle,soo	Respo
Subcontractor/Supplier Declaration	SSD-0009	Consultant SMSD		Katie Tuttle,soo	Declar
Request for Interpretations	RFI-00009	RFI Test 8		Katie Tuttle,soo	Respo
Submittals	SUB-0016	Test Submittal		Katie Tuttle,soo	Associ
Professional Services Amendments	Amend-0005	Amendment #1		Katie Tuttle,soo	Amenc
Request for Interpretations	RFI-00008	RFI Test 5		Katie Tuttle,soo	Respo
Professional Services Pay Request	PSPR-0008	Tuesday Test		Katie Tuttle,soo	Payme

# Reviewing a Task

Change Order - Test Proposal Request - Project No. OCI-080001 - Google Chrome

[https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\\_id=1049638&parent\\_id=0&viewOnly=0&project\\_id=](https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1049638&parent_id=0&viewOnly=0&project_id=)

File Edit View Actions Help

**Accept Task** Decline Task SOV Close Window

### Change Order

#### General

Administrative Services Record Number:

Creator:

Project Name:  Creation Date:

Project Location:  Status:

#### Task Details

From:  Task Due Date:

To:  Task Status:

Cc:

Sent For:

Task Notes (0)

Workflow Progress

#### Line Item List

Current View: All Show Currency in:

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

Grid Find Total Amount:

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

# Responding to a Task

- ▶ Review the upper and lower forms of the record
- ▶ Enter any additional information as necessary

Change Order - Test Proposal Request - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\_id=1049638&model=uco&project\_id=1003&initiateB

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion SOV Close Window

**General** Change Order

General

Organization: Department of Administrative Services Record Number: CO-0013

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: Agency General Projects Test Creation Date: 05/16/2016 11:53 AM (UTC-5)

Project Location: OAKS CI Administration Status: Pending

Title: Test Proposal Request

Contract Reference: OCI-090002-00

Change Order Type: Proposal Request

Change Order No.: CO-18

Change Order Details

Description of Work: Please

Justification: This is

Action Details

**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

Add Copy Import Remove Grid Find Total Amount: \$5,000.00

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

Note: Click to add a general comment that will be permanent to the record

# Responding to a Task

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustry.com/bp/pro...>. The browser's menu bar includes File, Edit, View, Actions, and Help. A red circle highlights the 'Send' button in the top toolbar, with an arrow pointing to a callout box that says 'Click Send'. Another red circle highlights the 'Workflow Actions' dropdown menu, which is open and shows options: Accept, Accept, Return for Clarification, and Reject. An arrow points from a callout box 'Select Appropriate Workflow Action' to this menu. The main content area displays a 'General' tab with fields for Organization (Department of Administrative Services), Record Number (CO-0013), Project Number (OCI-080001), Creator (Katie Tuttle), Project Name (Agency General Projects Test), Creation Date (05/16/2016 11:53 AM (UTC-5)), Project Location (OAKS CI Administration), and Status (Pending). Below this is an 'Action Details' tab, which is highlighted by a red box. It shows the selected action 'Accept' with a link to view latest content, a 'To...' field containing 'Katie Tuttle, Moenique Morris, Rita Nichols, Sara...', a 'Cc...' field, and 'Send For: PM Review'. An arrow points from a callout box 'When Workflow action is selected the Action Details (To: box) tab updates' to this section. At the bottom, there is a 'Line Item List' section with a table of 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 of the page, there are links for 'Attachments (0)', 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'.

# 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. The 'Logs' menu item in the left sidebar 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

Change Order - Test Proposal Request - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=13565&model=uco&fromcostlog=1&project\_id=1

File Edit View Actions Help

Accept Task Decline Task SOV Close Window

### Change Order

#### General

General

Organization: Department of Administrative Services Record Number: CO-0013

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: Agency General Projects Test Creation Date: 05/16/2016 11:53 AM (UTC-5)

Project Location: OAKS, CI Administration Status: Pending

#### Task Details

From: Katie Tuttle; Task Due Date:

To: Project Manager:Katie Tuttle; More... Task Status: Not Started

Cc:

Sent For: PM Review

Task Notes (0)

[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

Grid Find Total Amount: \$5,000.00

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

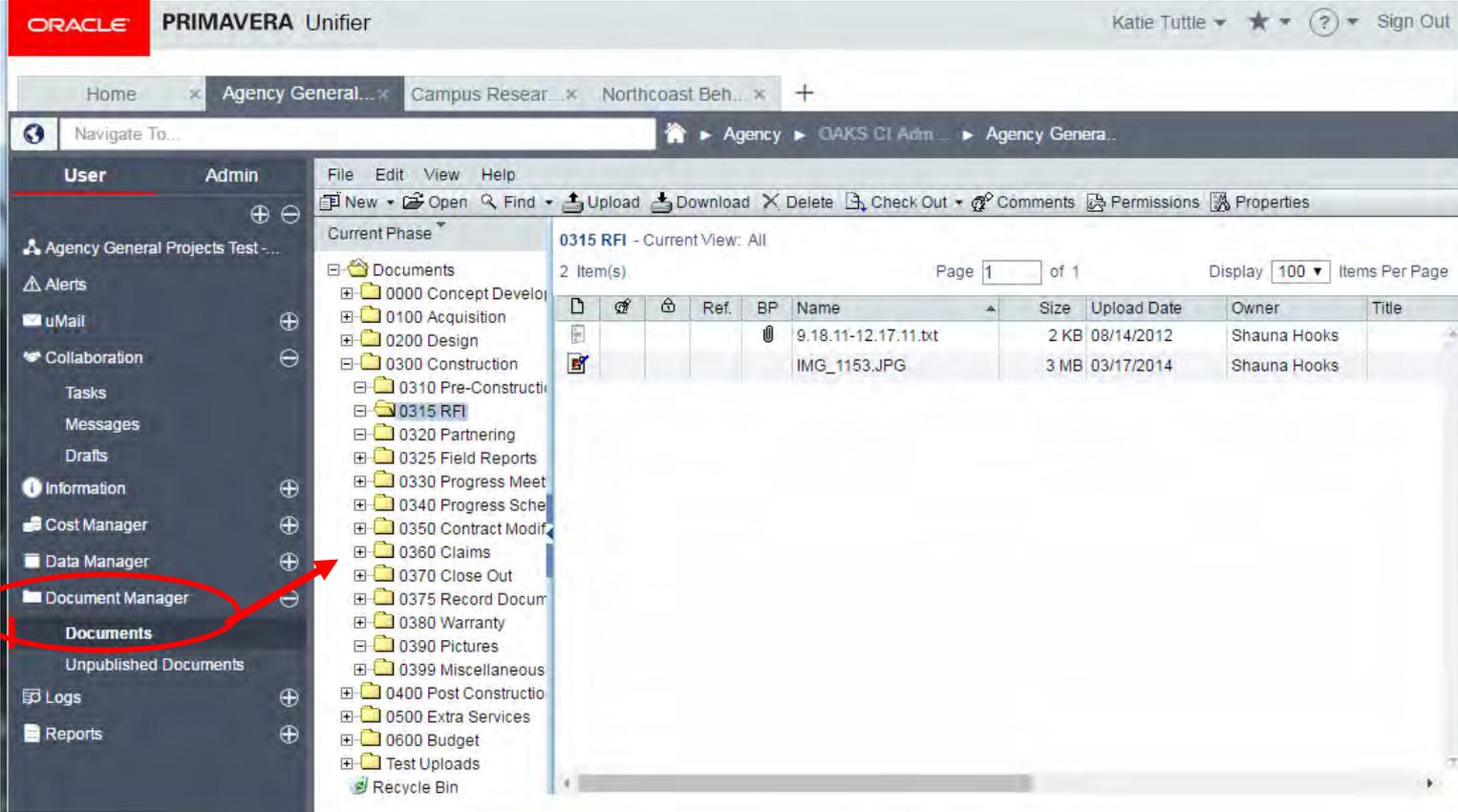
Below the table is a flowchart diagram illustrating the workflow. The steps are: Proposal Creation, AE Review, PM Review, Proposal Update, and CO Validation and DocuSign. The flow starts with Proposal Creation, leading to AE Review. From AE Review, an "Accept" action leads to PM Review. From PM Review, an "Accept" action leads to CO Validation and DocuSign. From CO Validation and DocuSign, a "Return for Clarification" action leads back to PM Review. From PM Review, a "Return for Clarification" action leads to Proposal Update. From Proposal Update, a "Withdraw" action leads back to Proposal Creation. The flowchart also shows a "Return for Clarification" path from PM Review back to AE Review. Buttons for "Print Graphic" and "Close" are visible at the bottom of the diagram.

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

- View the workflow of the Record from Creation to End** (points to the table)
- Diagram view of the workflow** (points to the flowchart)

# About Document Manager

- ▶ Document manager houses all supporting documentation
- ▶ The utilization of Document Manager will differ based on your particular project
- ▶ For more information on uploading and attaching documents, please refer to the Document Manager Job Aids on our website: [ofcc.ohio.gov](http://ofcc.ohio.gov)



The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Katie Tuttle'. Below the navigation bar, there are tabs for 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. The main interface is divided into a left sidebar and a main content area. The sidebar contains various navigation options, with 'Document Manager' highlighted in red. The main content area shows a file browser view for '0315 RFI' with a table 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	

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211