



Milestones

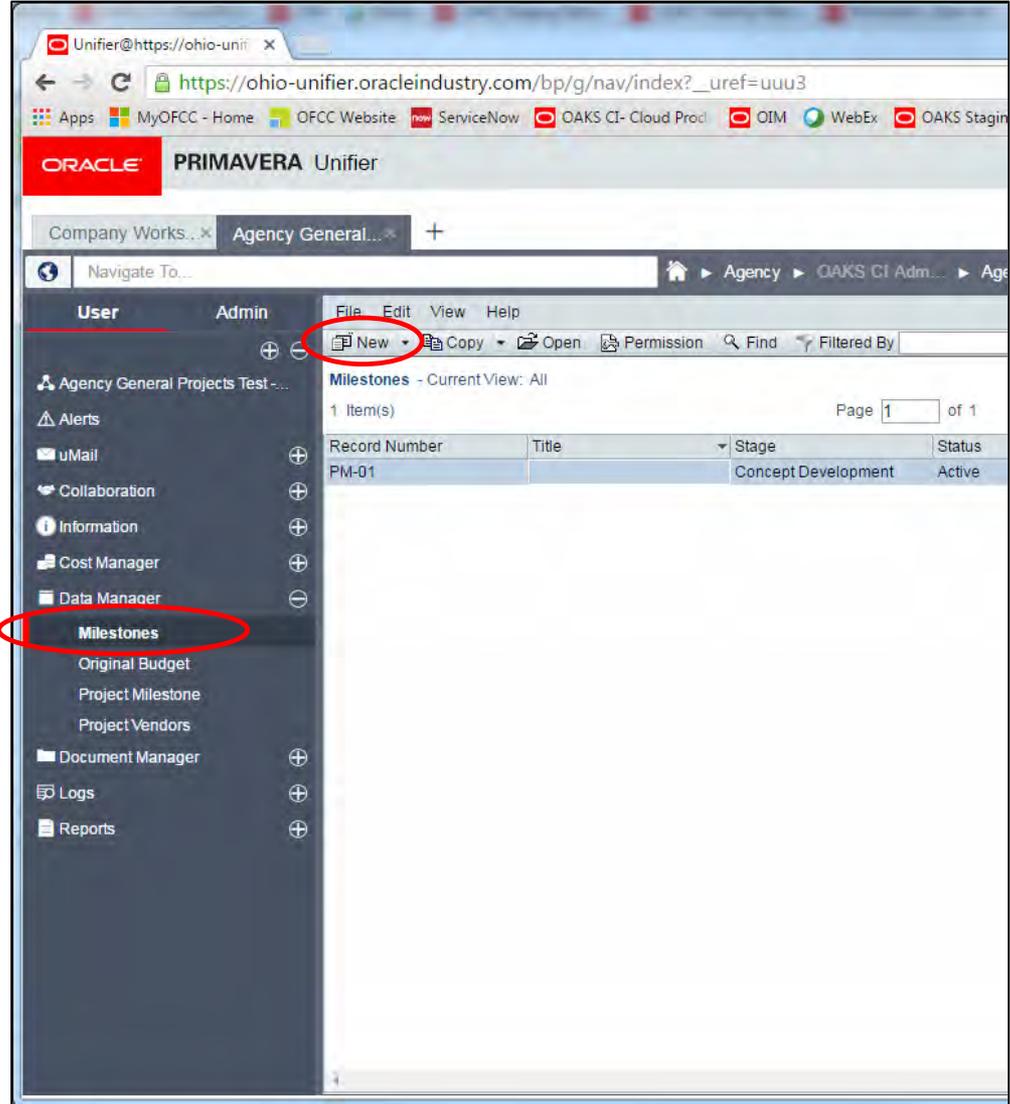
Agency/Higher-Ed

Purpose and Process

- ▶ The Project Milestone BP tracks the milestones for the entire life of the project.
- ▶ The data collected is used to run reports for calculating metrics.
- ▶ The Project Milestone BP should be continuously updated throughout the life of the project.
- ▶ One Project Milestone record should be created for each building or demo building project.
- ▶ This BP is housed under Data Manager and is a non-workflow record.

Milestones Creation

- ▶ In Oaks CI navigate to:
 - ▶ Data Manager -> Milestones
 - ▶ Click New



Complete Upper Form

- ▶ Fill out all information in the General section
- ▶ **Note:** The “Stage” box should be updated as needed throughout the project.

Additional project specific milestones may be added on the lower form. This BP is maintained by the PM, PC or PM Supervisor.

General

Organization: Department of Administrative Service
Project Number: OCI-080001
Project Name: Agency General Projects Test
Project Location: OAKS CI Administration
Title: Milestones Project
Project Phase: 50

Record Number:
Creator: Katie Tuttle
Creation Date:

Status: Active
Stage: Design

Project Dates

Project Start = Date procurement activities start (ie: PM drafts RFQ) or date AE RFQ posted. Project End = Date that final vendor's Contract Completion Certificate is executed and AE final payment made

Planned Project Start:
Revised Project Start:
Actual Project Start:
Planned Project End:
Revised Project End:
Actual Project End:

Design Milestones

Design Start = Date of Commencement of Services for AE (C-AE on DB projects). Design End = Date of Notice to Proceed of first package of work

Planned Design Start:
Revised Design Start:
Actual Design Start:
Planned Design End:
Revised Design End:
Actual Design End:

Additional Milestones

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

Complete Upper Form

- ▶ Fill out all date information in the **Project Dates** section

PROJECT DATES	
Project Start	Date AE RFQ is posted.
Project End	Date that final vendor's Contract Completion Certificate is executed and AE final payment is made
Planned	First entry should be based on dates entered in the AE RFQ May be updated at the following times (if applicable): When the Design Schedule and Project Schedule are first approved At time of GMP approval if a CMR/DB project Zero Dollar change orders dealing with weather delays
Revised	For data reporting purposes - always fill in. First entry should match the planned dates. Update quarterly or when a substantial change is known (Design, Bidding, Construction and Owner Delays).
Actual	Remains blank until the event has occurred. Update once milestone is achieved.

Create New Milestones - Project No. OCI-080001 - Google Chrome

<https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=uml&a=form.0&b=uml&bpcsvimport=08>

File Edit View Help

Finish Editing Save Spelling.. Add Attachment Close Window

General Milestones

Project Dates

Project Start = Date procurement activities start (ie: PM drafts RFQ) or date AE RFQ posted. Project End = Date that final vendor's Contract Completion Certificate is executed and AE final payment made

Planned Project Start: 07/30/2016 Revised Project Start: 07/30/2016 Actual Project Start:

Planned Project End: 07/29/2017 Revised Project End: 07/29/2017 Actual Project End:

Design Milestones

Design Start = Date of Commencement of Services for AE (C-AE on DB projects). Design End = Date of Notice to Proceed of first package of work

Planned Design Start: Revised Design Start: Actual Design Start:

Planned Design End: Revised Design End: Actual Design End:

Construction Milestones

Additional Milestones

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

Update Status and Stage

- ▶ **Note:** Once you have entered the Actual Project End date in the **Project Dates** section, change the Status and Stage in the **General** section to “Completed”

Create New Milestones - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=uml&a=form.0&b=uml&bpcsvimport=08

File Edit View Help

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General Milestones

Additional project specific milestones may be added on the lower form. This BP is maintained by the PM, PC or PM Supervisor.

General

Organization: Department of Administrative Service Record Number:

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: Agency General Projects Test Creation Date:

Project Location: OAKS CI Administration

Title: Milestones Project

Project Phase:

Status: Completed

Stage: Completed

Project Dates

Project Start = Date procurement activities start (ie: PM drafts RFQ) or date AE RFQ posted. Project End = Date that final vendor's Contract Completion Certificate is executed and AE final payment made

Planned Project Start: 07/30/2016 Revised Project Start: 07/30/2016 Actual Project Start: 08/11/2016

Planned Project End: 07/29/2017 Revised Project End: 07/29/2017 Actual Project End: 09/02/2017

Additional Milestones

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

Complete Upper Form

- ▶ Fill out all date information in the **Design Milestones** section

DESIGN MILESTONES	
Design Start:	Date of Notice to Commence Services for AE or C-AE
Design End	Date of Notice to Proceed on 1st package of work
Planned	First entry should be based on dates entered in the AE RFQ May be updated at the following times (if applicable): When the Design Schedule and Project Schedule are first approved At time of GMP approval if a CMR/DB project Zero Dollar change orders dealing with weather delays
Revised	For data reporting purposes - always fill in. First entry should match the planned dates. Update quarterly or when a substantial change is known (Design, Bidding, Construction and Owner Delays).
Actual	Remains blank until the event has occurred. Update once milestone is achieved.

Browser: Create New Milestones - Project No. OCI-080001 - Google Chrome
 URL: https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=uml&a=form.0&b=uml&bpcsvimport=08

Design Milestones

Design Start = Date of Commencement of Services for AE (C-AE on DB projects). Design End = Date of Notice to Proceed of first package of work

Planned Design Start: 07/30/2016 Revised Design Start: 07/30/2016 Actual Design Start:

Planned Design End: 09/22/2016 Revised Design End: 07/22/2016 Actual Design End:

Construction Milestones

Construction Start = Date of Notice to Proceed of first package of work. Substantial Completion = Date of Notice of Substantial Completion. Construction End = Date of final vendor's Contract Completion Certificate is executed.

Planned Construction Start: Revised Construction Start: Actual Construction Start:

Planned Substantial Completion: Revised Substantial Completion: Actual Substantial Completion:

Additional Milestones

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

Complete Upper Form

- Fill out all date information in the **Construction Milestones** section

CONSTRUCTION MILESTONES	
Construction Start	Date of the Notice to Proceed of the 1st package of Work
Substantial Completion	Date of Notice of Substantial Completion
Construction End	Date that the final vendor's Contract Completion Certificate is executed
Planned	First entry should be based on dates entered in the AE RFQ May be updated at the following times (if applicable): When the Design Schedule and Project Schedule are first approved At time of GMP approval if a CMR/DB project Zero Dollar change orders dealing with weather delays
Revised	For data reporting purposes - always fill in. First entry should match the planned dates. Update quarterly or when a substantial change is known (Design, Bidding, Construction and Owner Delays).
Actual	Remains blank until the event has occurred. Update once milestone is achieved.

Create New Milestones - Project No. OCI-080001 - Google Chrome

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File Edit View Help

Finish Editing Save Spelling.. Add Attachment Close Window

General Milestones

Construction Milestones

Construction Start = Date of Notice to Proceed of first package of work. Substantial Completion = Date of Notice of Substantial Completion. Construction End = Date of final vendor's Contract Completion Certificate is executed.

Planned Construction Start: 09/25/2016 Revised Construction Start: 09/25/2016 Actual Construction Start:

Planned Substantial Completion: 07/25/2017 Revised Substantial Completion: 07/25/2017 Actual Substantial Completion:

Planned Construction End: 09/30/2017 Revised Construction End: 09/30/2016 Actual Construction End:

Additional Milestones

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

Complete Lower Form

- ▶ Use the lower form, **Additional Milestones**, for additional milestones for each public bid or GMP in project.
- ▶ Click Add
- ▶ Choose Detail or Summary Line Item

Create New Milestones - Project No. OCI-080001 - Google Chrome

<https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=uml&a=form.0&b=uml&bpcsvimport=08>

File Edit View Help

Finish Editing Save Spelling... Add Attachment Close Window

General Milestones

Additional Milestones

Current View: All

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

No.	Sm	Short Description	Original Completion Date	Revised Completion Date	Actual Completion Date	Schedule Impact (Days)	Reason For Change
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Detail Line Item

Summary Line Item

Add Copy Import Remove Grid Find

javascript:MyHide();cost_add_item(); [ds \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Complete Lower Form

- ▶ Fill out line item information
- ▶ Click OK

Line Item - Google Chrome

<https://ohio-stage-unifier.oracleindustry.com/bp/studio/bp/database/itemopen?z>

Spelling... Attach Delete Line Item

Milestones Line Item:

Include additional milestones for each public bid and GMP in project. Bid Date = date of public bid opening. GMP Date = date of GMP Meeting that reached agreement.

Short Description: *

Milestone Type:

Original Completion Date:

Revised Completion Date:

Actual Completion Date:

Schedule Impact (Days):

Reason For Change:

Notes

Notes:

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

Complete Lower Form

- Line Items will show up in the Additional Milestones section

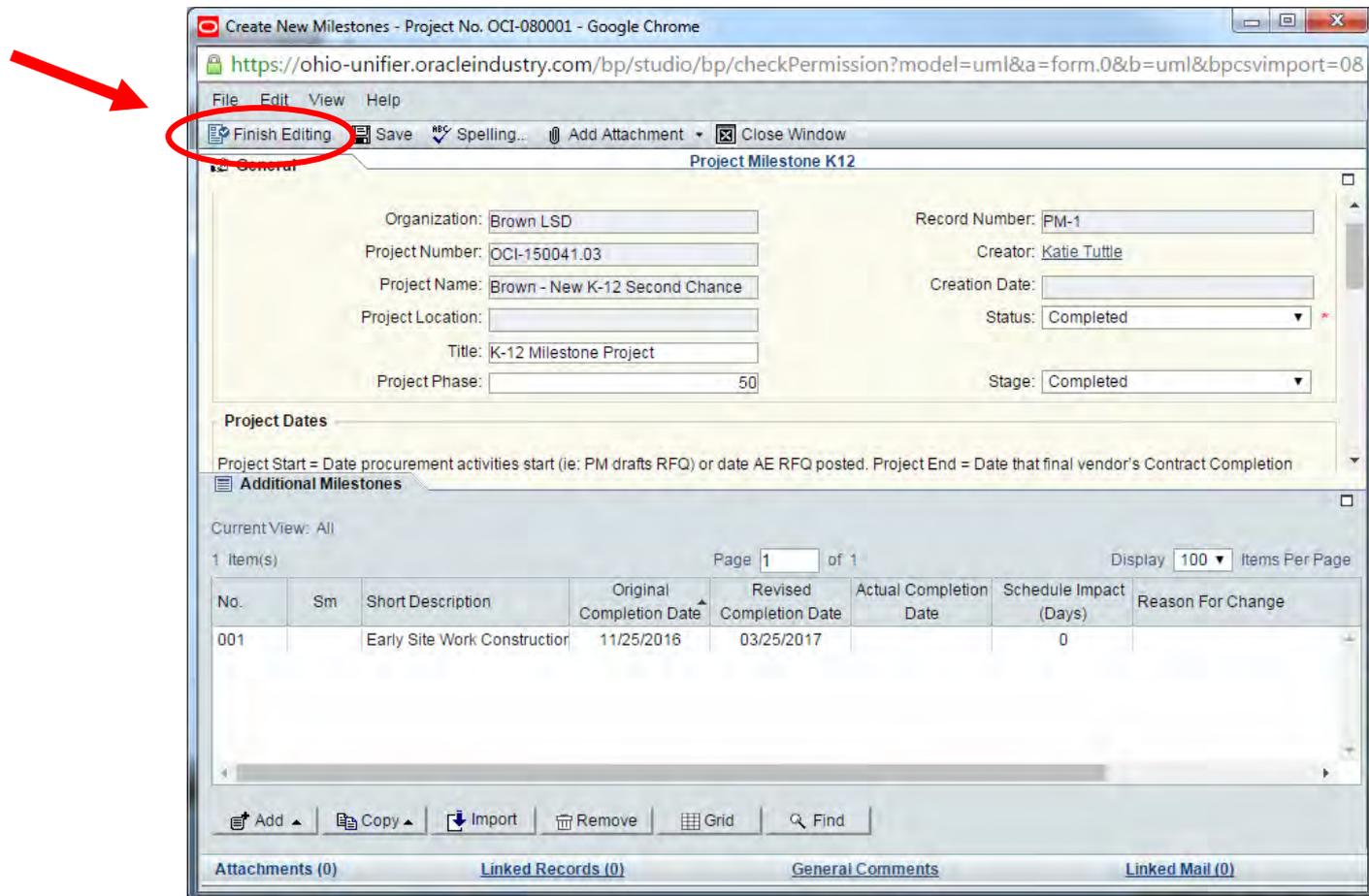
The screenshot shows a web browser window titled "Create New Milestones - Project No. OCI-080001 - Google Chrome". The URL is <https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=uuml&a=form.0&b=uuml&bpcsvimport=08>. The interface includes a menu bar (File, Edit, View, Help) and a toolbar with options like "Finish Editing", "Save", "Spelling...", "Add Attachment", and "Close Window". The main content area is divided into two tabs: "General" and "Additional Milestones". The "Additional Milestones" tab is selected, showing a table with the following data:

No.	Sm	Short Description	Original Completion Date	Revised Completion Date	Actual Completion Date	Schedule Impact (Days)	Reason For Change
001		Early Site Work Construction	11/25/2016	03/25/2017		0	

Below the table, there are navigation buttons: "Add", "Copy", "Import", "Remove", "Grid", and "Find". At the bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)". A red box highlights the first row of the table, and a red arrow points to the "Reason For Change" column header.

Finish Editing

- ▶ When you're finished entering all information or updating the record, click Finish Editing
- ▶ **Reminder:** The Milestone record should be updated throughout the project as necessary.



The screenshot shows a web browser window titled "Create New Milestones - Project No. OCI-080001 - Google Chrome". The address bar shows the URL: <https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=uml&a=form.0&b=uml&bpcsvimport=08>. The browser's menu bar includes File, Edit, View, and Help. Below the menu bar is a toolbar with buttons for "Finish Editing", "Save", "Spelling...", "Add Attachment", and "Close Window". The "Finish Editing" button is circled in red, and a red arrow points to it from the left. The main content area is titled "Project Milestone K12" and contains a form with the following fields:

- Organization:
- Project Number:
- Project Name:
- Project Location:
- Title:
- Project Phase:
- Record Number:
- Creator:
- Creation Date:
- Status:
- Stage:

Below the form is a section titled "Project Dates" with a description: "Project Start = Date procurement activities start (ie: PM drafts RFQ) or date AE RFQ posted. Project End = Date that final vendor's Contract Completion".

Underneath is a section titled "Additional Milestones" with a table showing one item:

No.	Sm	Short Description	Original Completion Date	Revised Completion Date	Actual Completion Date	Schedule Impact (Days)	Reason For Change
001		Early Site Work Construction	11/25/2016	03/25/2017		0	

At the bottom of the page, there are several utility buttons: "Add", "Copy", "Import", "Remove", "Grid", and "Find". At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".