



Pay Requests, Review & Approval

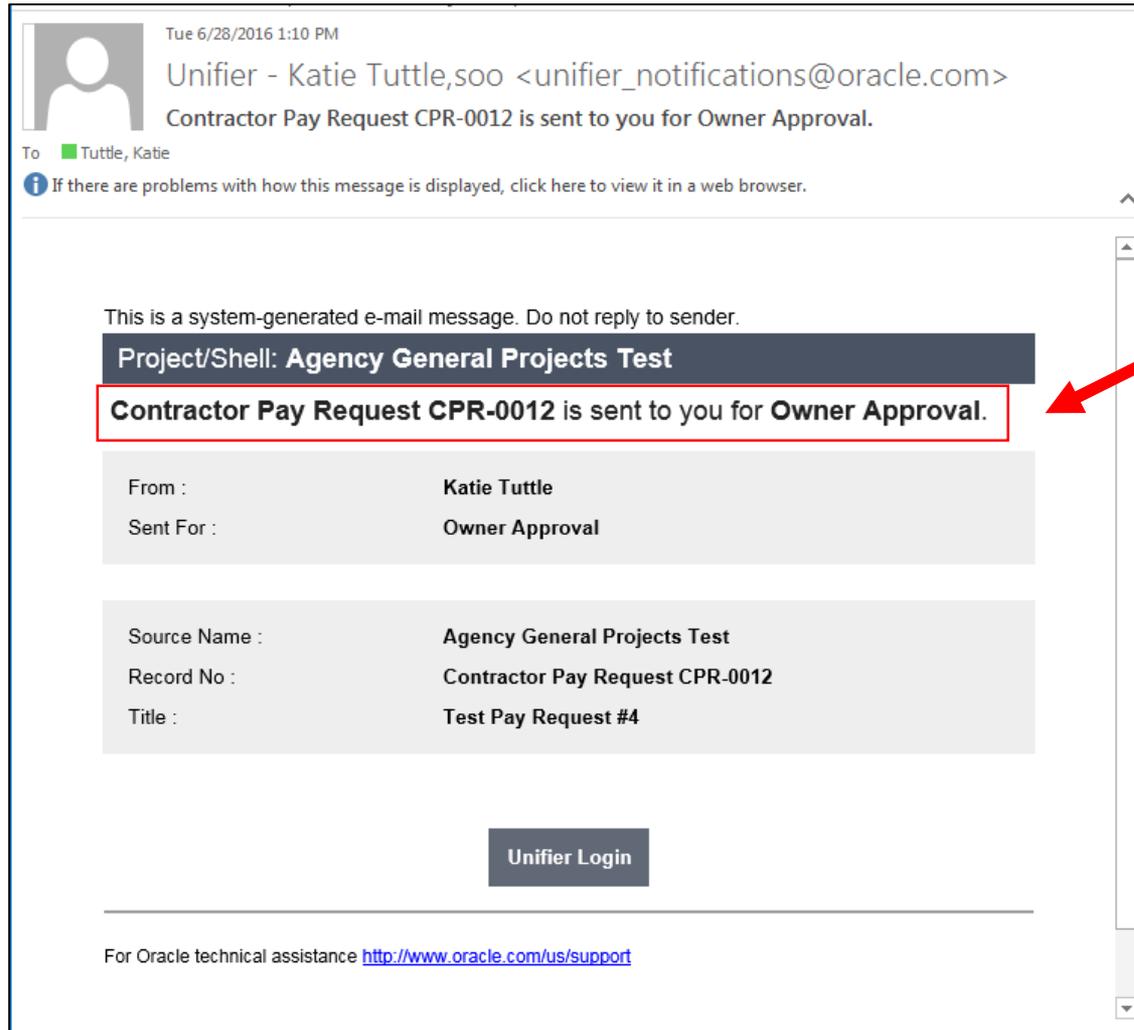
Agency/Higher-Ed

Types and Process

- ▶ As the representative for the **Owner**, you will be reviewing and approving two types of pay request records:
- ▶ Contractor Pay Request
 - ▶ Created by: **Contractor** → Submitted to: **Associate (A/E) Review** → Sent to: **Contractor Update (if necessary)** → Sent to: **PC Review and Validation** → Sent to: **PM Review** → Sent to: **PM Supervisor Review** → **Sent to: Owner Approval** → Sent to: **Owner for Payment Processing**
- ▶ Professional Services Pay Request
 - ▶ Created by: **Associate (A/E)** → Submitted to: **PM Approval** → Sent to: **A/E Update (if necessary)** → Sent to: **PC for Payment Request Validation** → Sent to: **PM Supervisor Approval** → **Sent to: Owner Approval** → Sent to: **Owner for Payment Processing**

Receive an Email

- ▶ When you have a Pay Request for you to review and approve, you will receive an email notification from OAKS CI



Access Your Project

- ▶ The quickest and easiest way to access your project is to type your project name or number into the navigation bar on your Cross Project Homepage

The screenshot displays the Oracle Primavera Unifier interface. At the top, the Oracle logo and 'PRIMAVERA Unifier' are visible. The user is logged in as 'Proxy for Katie Tuttle' and can 'Sign Out'. The browser tabs include 'Home', 'Campus Resear...', 'Northcoast Beh...', and 'New Exhibition ...'. The search bar contains 'dnr', and a dropdown menu shows 'Matched Locations' with the following entries:

Project ID	Project Name	Agency/Department
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

Below the search results, there is a section for 'Key Locations'. On the right side of the interface, a sidebar titled 'Items Requiring Your Attention:' shows the following statistics:

- Tasks: 21 Total, 6 New, 5 Late
- Messages: 4 New
- Draft Records: 23 New
- uMails: 0 New

Task Action

- ▶ To review and approve the Pay Request:
 - ▶ Navigation to: Collaboration -> Tasks
 - ▶ Double-click your Task to open

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Proxy for Katie Tuttle'. Below the navigation bar, there are tabs for 'Agency General...', 'Campus Resear...', 'Northcoast Beh...', and 'New Exhibition...'. The main content area shows a list of tasks under the heading 'Tasks - Current View: All'. The list has 21 items and is displayed on page 1 of 1. A red box highlights the first task in the list, 'Contractor Pay Request', which has the number 'CPR-0012' and the title 'Test Pay Request'. The 'From' field is 'Katie Tuttle,soo' and the 'Sent for' field is 'Owner Approval'. A red arrow points to the 'Owner Approval' status. The table below shows the following data:

Type	Number	Title	Record Due	From	Sent for	Task Due
Contractor Pay Request	CPR-0012	Test Pay Request		Katie Tuttle,soo	Owner Approval	
Change Order	CO-0014	CO Test		Katie Tuttle,soo	Proposal Creation	
Design Reviews	DR-0005			Katie Tuttle,soo	Initial Review	06/30/2016
Change Order	CO-0013	Test Proposal Req		Katie Tuttle,SOO	PM Review	
Contractor Pay Request	CPR-0011	PR-004 Test		Katie Tuttle,soo	Payment Processing	
Professional Services Agreements	Agree-0014	Agreement #3		Katie Tuttle,soo	Acknowledgement	
Professional Services Agreements	Agree-0013	Test Agreement #2		Katie Tuttle,soo	Update	
Contract	CON-0002	C Test		Rita Nichols, soo	Notice of Intent To Award	
Request for Interpretations	RFI-00010	Request #1		Katie Tuttle,soo	Response Acceptance	03/24/2016
Subcontractor/Supplier Declaration	SSD-0009	Consultant SMSD		Katie Tuttle,soo	Declaration Review	
Request for Interpretations	RFI-00009	RFI Test 8		Katie Tuttle,soo	Response Acceptance	02/02/2016
Submittals	SUB-0016	Test Submittal		Katie Tuttle,soo	Associate Review	02/04/2016
Professional Services Amendments	Amend-0005	Amendment #1		Katie Tuttle,soo	Amendment Proposal Review	
Request for Interpretations	RFI-00008	RFI Test 5		Katie Tuttle,soo	Response Acceptance	01/13/2016
Professional Services Pay Request	PSPR-0008	Tuesday Test		Katie Tuttle,soo	Payment Process	
Action Items	AI-00018	test action item	10/12/2015	Katie Tuttle,soo	Delegate Response	
Action Items	AI-00017	Action Item Test	10/01/2015	Katie Tuttle,soo	Review	

Task Action

- ▶ Review Task Details and any Task Notes
- ▶ Click “Accept Task”

The screenshot displays a web browser window titled "Contractor Pay Request - PR-004 Test - Project No. OCI-080001 - Google Chrome". The URL is https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1075910&parent_id=0&viewOnly=0&project_id=:. The browser's menu bar includes File, Edit, View, Actions, and Help. Below the menu bar, there are several buttons: "Accept Task" (circled in red), "Decline Task", "Line Item History", "SOV", and "Close Window".

The main content area is titled "Contractor Pay Request" and has a "General" tab selected. The "General" section contains the following fields:

- Organization: Department of Administrative Services
- Project Name: Agency General Projects Test
- Project Number: OCI-080001
- Project Location: OAKS CI Administration
- Record Number: CPR-0011
- Creator: Katie Tuttle
- Creation Date: 06/07/2016 03:47 PM (UTC-5)
- Status: Pending

Below the "General" section is the "Task Details" section, which is outlined in red. It contains the following information:

- From: Katie Tuttle
- To: Owner:Katie Tuttle; [More...](#)
- Cc:
- Sent For: Owner Approval
- Task Due Date:
- Task Status: Not Started
- [Task Notes \(1\)](#) (circled in red)

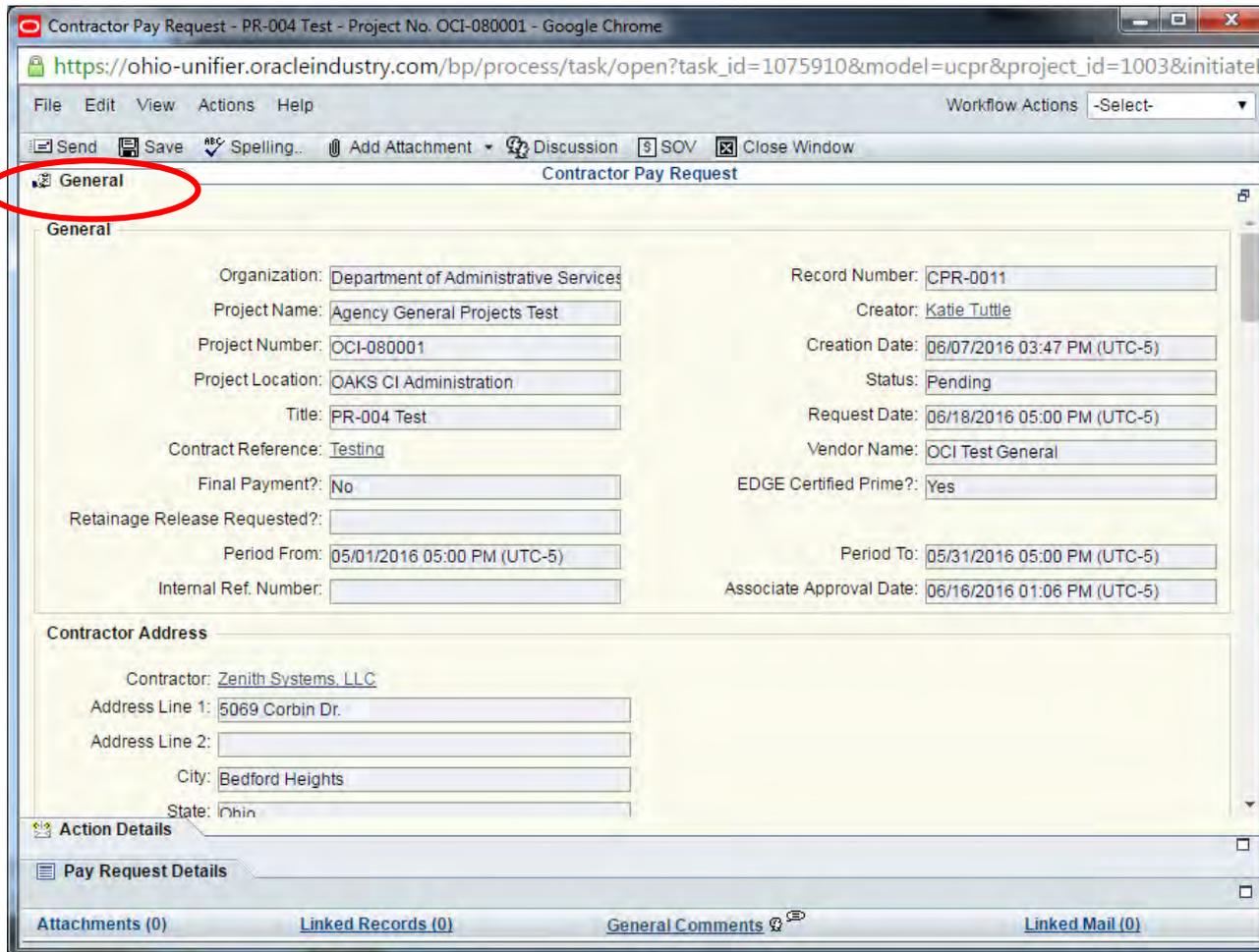
At the bottom of the page is the "Pay Request Details" section. It shows "Current View: All", "Show Currency in: Transaction Currency", and "2 Item(s)" on "Page 1 of 1". A table displays the following data:

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	DPE or Reimb
002	OR-OR-BE	Owner Expense Budget	\$2,500.00	\$800.00	\$200.00	\$0.00	\$0.00	\$40.00	\$0.00

At the bottom right, the "Total Amount:" is \$3,200.00. The footer includes links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Review the Record

- ▶ Click the General Tab to expand the upper form
- ▶ Carefully review the record by scrolling through the upper form
- ▶ Ensure that all data entered is correct



Contractor Pay Request - PR-004 Test - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1075910&model=ucpr&project_id=1003&initiate

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contractor Pay Request

General

Organization:	Department of Administrative Services	Record Number:	CPR-0011
Project Name:	Agency General Projects Test	Creator:	Katie Tuttle
Project Number:	OCI-080001	Creation Date:	06/07/2016 03:47 PM (UTC-5)
Project Location:	OAKS CI Administration	Status:	Pending
Title:	PR-004 Test	Request Date:	06/18/2016 05:00 PM (UTC-5)
Contract Reference:	Testing	Vendor Name:	OCI Test General
Final Payment?:	No	EDGE Certified Prime?:	Yes
Retainage Release Requested?:			
Period From:	05/01/2016 05:00 PM (UTC-5)	Period To:	05/31/2016 05:00 PM (UTC-5)
Internal Ref. Number:		Associate Approval Date:	06/16/2016 01:06 PM (UTC-5)

Contractor Address

Contractor:	Zenith Systems, LLC
Address Line 1:	5069 Corbin Dr.
Address Line 2:	
City:	Bedford Heights
State:	Ohio

Action Details

Pay Request Details

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

Review the Record

- ▶ Click on the Pay Request Details Tab
- ▶ Review all line items for accuracy
- ▶ Make sure Total Amount is correct

Contractor Pay Request - PR-004 Test - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1075910&model=ucpr&project_id=1003&initiatel

File Edit View Actions Help Workflow Actions -Select-

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

General Contractor Pay Request

Action Details

Pay Request Details

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	DPE or Reimb
002	OR-OR-BE	Owner Expense Budget	\$2,500.00	\$800.00	\$200.00	\$0.00	\$0.00	\$40.00	\$0.00
001	CE-01-BE	General Requirements Budget	\$60,000.00	\$45,000.00	\$3,000.00	\$80.00	\$0.00	\$0.00	\$0.00

Add Copy Import Remove Find

Total Amount: \$3,200.00

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

Approve the Record

- ▶ Once you have completed your review, click on the Action Details Tab
- ▶ Choose the Workflow Action: Approve
- ▶ The “To” box will populate with who the record goes to next
- ▶ Click Send

Contractor Pay Request - PR-004 Test - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1075910&model=ucpr&project_id=1002&initiate...

File Edit View Actions Help

Workflow Actions: Approve, Approve, Return for Clarification

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

General Contractor Pay Request

Action Details

Approve (Click here to view latest content)

To... Katie Tuttle, Moenique Morris, Rita Nichols, Sara...

Cc...

Send For: Payment Processing

Task Notes:

Pay Request Details

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

Next Steps

- ▶ The record will now go to the person in the “Owner Financial” role
- ▶ The Owner Financial will create a Voucher in their own Financial System of Record, then Record that Voucher in OAKS CI
- ▶ Finally, they will complete the Payment Processing step by plugging in that Voucher into the Pay Request Record

- ▶ For more information on completing the Payment Processing step, please refer to the **Record and Apply Voucher Job Aid**

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211