



Schedule Approvals

Agency/Higher-Ed

Purpose & Procedure

- ▶ The Schedule Approvals business process is used to provide a structured process to manage submission, review, and approval of the original baseline schedule and subsequent monthly updates as required to facilitate scheduling requirements on a construction project.

- ▶ Workflow

Created by: **Schedule Manager** → Sent to: **Contractor Review**
→ Sent to: **Schedule Manager update (if necessary)** → Sent to: **PM Review**

Create Schedule Approval

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Schedule Approvals
 - ▶ Click New

The screenshot displays the Oracle Primavera Unifier web application interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier'. Below this, there are several tabs for different projects: 'Agency General...', 'Home', 'Campus Resear...', 'Northcoast Beh...', and 'New Exhib...'. A search bar labeled 'Navigate To...' is present. The main interface is divided into a left sidebar and a main content area. The sidebar contains a list of menu items, with 'Logs' highlighted by a red circle. A red arrow points from the 'Logs' menu item to the 'Schedule Approvals' item at the bottom of the sidebar. The main content area shows a table titled 'Schedule Approvals - Current View: All' with 1 item(s). The table has columns for 'Record No.', 'Title', and 'Status'. The data row shows 'SA-0001', 'June 19 Updates Test', and 'Pending'. A 'New' button in the top right of the main area is also circled in red.

Record No.	Title	Status
SA-0001	June 19 Updates Test	Pending

Schedule Approval

- ▶ Complete all open fields
 - ▶ Fields marked with a red * are mandatory

Create New Schedule Approvals - Project No. OCI-090004 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?project_id=1021&module_name=usa&csvimport=false

File Edit View Actions Help Workflow Actions -Select-

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

Schedule Approvals

General

Organization: Department of Administrative Service Record Number:

Project Number: OCI-090004 Creator: Katie Tuttle

Project Name: OAKS CI Training 4 Creation Date:

Project Location: 4200 Surface Road

Title: Schedule #1 * Status:

On Schedule: No * Schedule Variance (Days): 30 *

Schedule Attached?: * Schedule Type: -Select- *

Report Detail

Progress:

Comments:

Action Details

Create New Schedule Approvals

To...

Cc...

Send For:

Task Notes:

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

Add Attachments

- ▶ Attach necessary documents by clicking Add Attachment and choose Unifier Folder
- ▶ Choose a document from Document Manager
- ▶ Click OK

The screenshot displays a web browser window titled "Create New Schedule Approvals - Project No. OCI-090004 - Google Chrome". The URL is https://ohio-train-unifier.oracleindustry.com/bp/process/new?project_id=1021&module_name=usa&csvimport=false. The page shows a form for creating a new schedule approval. The "Add Attachment" button is circled in red, and a red arrow points to the "Unifier Folder" option in the dropdown menu. A "Select Files" dialog box is open, showing a file list with columns for Name, Size, Upload Date, Owner, and Title. The "OK" button in the dialog is also circled in red.

Organization: Department of Administrative Service
Project Number: OCI-090004
Project Name: OAKS CI Training 4
Project Location: 4200 Surface Road
Title: Schedule #1
On Schedule: No
Schedule Attached?:

Report Detail
Progress:
Comments:

Action Details
Create New Schedule Approvals
To...
Cc...
Send For:

Current Phase: Documents
Schedule - Current View: All
5 Item(s)
Page 1 of 1
Display 100 items per page

Ref	BP	Name	Size	Upload Date	Owner	Title
		bat.updatedschedule.pdf	23 KB	10/31/2014	Thomas Lee	
		BATAVIA Revised Schemul	115 KB	12/17/2015	Tim Kemme	
		batavia.schedule.100414.p	27 KB	10/04/2014	Thomas Lee	
		batavia.schedule.pdf	43 KB	09/02/2014	Thomas Lee	
		batavia.schedule.rev1.pdf	40 KB	09/09/2014	Thomas Lee	

Copy Comments

OK Cancel

Schedule Approval

- ▶ Attachments will populate at the bottom of the record
- ▶ To send the record, choose a Workflow Action
- ▶ You must choose who to send the record to by clicking the “To” button and choosing a user or users
- ▶ Click Send

The screenshot displays a web browser window titled "Create New Schedule Approvals - Project No. OCI-090004 - Google Chrome". The address bar shows the URL: https://ohio-train-unifier.oracleindustry.com/bp/process/new?project_id=1021&module_name=usa&csvimport=false. The browser's menu bar includes File, Edit, View, Actions, and Help. A red arrow points to the "Send" button in the browser's toolbar. Another red circle highlights the "Workflow Actions" dropdown menu, which is currently set to "Submit".

The main content area is titled "Schedule Approvals" and includes a "General" tab. The "General" section contains fields for "Organization" (Department of Administrative Service), "Record Number", "Project Number", "Project Name", "Project Location", "On Schedule", and "Schedule Attachments". A "Report Detail" section is also visible.

An "Action Details" section at the bottom features a "Submit" button, a "To..." field (highlighted with a red circle), a "Cc..." field, and a "Send For" dropdown set to "Contractor Review". The "Task Due" is 06/03/2016, and there is a "Task Notes" field.

A "User/Group Picker" dialog box is open, showing a list of users and groups. The "Names from" field is set to "OAKS CI Training 4" and "Show By" is set to "Users/Groups". The list shows 24 items, with the following visible:

Name	Company
Contractor	
Katie Tuttle	State of Ohio
Kaylie Ruff	State of Ohio
Moenique Morris	State of Ohio
Oaks Instructor	State of Ohio
Rita Nichols	State of Ohio

At the bottom of the dialog box, there are buttons for "Add", "View Profile", and "Members". A red arrow points to the "Add" button.

Questions?

Please contact OAKS CI Support Desk:

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