



# 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.
- ▶ The Project Manager should determine who will hold the “Schedule Manager” role

- ▶ 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 Create

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'Agency' and 'OAKS CI Training 4'. The left sidebar menu is open, with 'Logs' highlighted in a red circle. Below 'Logs', the 'Schedule Approvals' option is highlighted in a red bar, and a red arrow points to it from the text below. The main content area shows the 'Schedule Approvals' page with a '+ Create' button circled in red. Below the button, there is a table with columns 'Record No.' and 'Title', containing one entry: 'SA-0001' and 'trying it out'. The bottom right corner of the interface shows 'Total: 1'.

# Schedule Approval

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

Schedule Approvals - trying it out - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=usa&fromSource=simple&fromModelId=1&module\_name=usa&project\_id=1021&

File Edit View Actions Help

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

**General** Schedule Approvals

**General**

Organization: Department of Administrative Services Record Number:

Project Number: OCI-090004 Creator: [Katie Tuttle](#)

Project Name: OAKS CI Training 4 Creation Date:

Project Location: 4200 Surface Road

Title: Sample Schedule Approval \* Status:

On Schedule: Yes \* Schedule Variance (Days):  \*

Schedule Attached?:  \* Schedule Type: Intermediate \*

Report Detail

Progress:

**Action Details**

Submit

To:

Cc:

Send For: Contractor Review Task Due: 07/05/2017

Task Notes: [Workflow Progress](#)

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 shows a web browser window titled "Schedule Approvals - trying it out - Project No. OCI-090004 - Mozilla Firefox". The URL is [https://ohio-dev-unifier.oradeindustry.com/bp/process/new?copy=1&fromModel=usa&fromSource=simple&fromModelId=1&module\\_name=usa&project\\_id=1021&](https://ohio-dev-unifier.oradeindustry.com/bp/process/new?copy=1&fromModel=usa&fromSource=simple&fromModelId=1&module_name=usa&project_id=1021&). The browser's workflow actions include "Submit", "Send", "Save", "Spelling...", "Undo Accept Task", "Add Attachment", "Discussion", and "Close Window". The "Add Attachment" dropdown menu is open, showing "My Computer" and "Unifier Folder" options. The "Unifier Folder" option is circled in red. Below the dropdown, the "General" section of the form is visible, with fields for Organization (Department of Administrative Services), Project Number (OCI-090004), Project Name (OAKS CI Training 4), Project Location (4200 Surface Road), Title (Sample Schedule Approval), On Schedule (Yes), and Schedule Attached? (checked). The "Report Detail" section shows a "Progress" field. The "Action Details" section includes "Submit" buttons for "To..." and "Cc...", and a "Send For" field set to "Contractor Review". A "Task Due" field is also present. At the bottom, there is a "Linked Records (0)" link. A file explorer window titled "Select Files - Internet Explorer" is open, showing a list of files in the "Schedule" folder. The file list includes:

Ref	BP	Name	Size	Upload Date	Owner	Title
		bat.updatedschedule.pdf	23 KB	10/31/2014	Thomas Lee	
		BATAVIA Revised Schedules	115 KB	12/17/2015	Tim Kemme	
		batavia.schedule.100414.pdf	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	

The "OK" button in the file explorer window is circled in red.

# Schedule Approval

- ▶ Attachments will populate at the bottom of the record
- ▶ Verify 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 "Schedule Approvals - trying it out - Project No. OCI-090004 - Mozilla Firefox". The address bar shows the URL: [https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=usa&fromSource=simple&fromModelId=1&module\\_name=usa&project\\_id=1021&](https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=usa&fromSource=simple&fromModelId=1&module_name=usa&project_id=1021&). The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". The "Workflow Actions" menu is open, showing options: "Submit", "Send", "Save", "Spelling...", "Undo Accept Task", "Add Attachment", "Discussion", and "Close Window". The "Send" button is highlighted with a red box, and a red arrow points from it to a "User/Group Picker" dialog box.

The "User/Group Picker" dialog box is titled "User/Group Picker - Google Chrome" and shows a search bar with "Find". Below the search bar, it displays "Names from: OAKS CI Training 4" and "Show By: Users/Groups". The "Users/Groups - Current View: All" section shows a table with 24 items (page 1 of 1, display 100 items per page). The table has columns for "Name" and "Company".

Name	Company
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

Below the table, there are buttons for "Add", "View Profile", and "Members". The "Selected Users/Groups" section shows a list of names.

The main form in the background is titled "Schedule Approvals" and has a "General" section with the following fields:

- Organization: Department of Administrative Services
- Project Number: OCI-090004
- Project Name: OAKS CI Training 4
- Project Location: 4200 Surface Road
- Title: Sample Schedule Approval
- Status: [Empty]
- On Schedule: Yes
- Schedule Attached?:

The "Report Detail" section has a "Progress:" field. The "Action Details" section has a "Submit" button and a "To..." button (highlighted with a red circle and a red arrow). Below the "To..." button is a "Cc..." button and a "Send For:" field with the value "Contractor Review".

At the bottom of the page, there are links for "Attachments (6)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# Questions?

Please contact OAKS CI Support Desk:

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