



Subcontractor/Material Supplier Declaration- A/E Agency/Higher-Ed

Purpose & Procedure

- ▶ The Subcontractor Supplier Declaration Business Process (BP):
 - ▶ Provides for the submittal, review, and approval of the Professional Service Providers EDGE Consultants

- ▶ Workflow

Created by: **Associate** → Submitted to: **PM Declaration Review** → Sent to: **Associate Update (if necessary)** → Sent to: **PC Review** → Sent to: **Additional Information Hold (if necessary)** → Sent to: **PC Validation**

Create a New Subcontractor/Supplier Declaration Record

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Subcontractor/Supplier Declaration
 - ▶ Click Create

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'Agency' and 'OAKS CI Training 4'. A sidebar menu on the left is open, with 'Logs' highlighted and circled in red. Below 'Logs', the menu items are listed, and 'Subcontractor/Supplier De...' is highlighted at the bottom. A red arrow points from the text 'Click Create' in the list to this menu item. In the main content area, the 'Subcontractor/Supplier Declaration' page is visible, with a '+ Create' button circled in red. Below the button is a table with columns for 'Subcontractor/Supplier' and a list of records. The table includes a 'Total: 144' at the bottom right.

Subcontractor/Supplier
2x General
123456
a
A1
AAA1
ABC Contracting
Air
Alfreds
ARL
Bailey's Iron Works
Bailey's Mechanical Services
Ben & Jerry's Concrete Comp
Ben & Jerry's Concrete Comp...
Ben & Jerry's Concrete Comp...
Ben & Jerry's Concrete Compar
Ben and Jerry's Concrete
Ben and Jerry's Concrete Com.
Ben and Jerry's Concrete Com.
Ben and Jerry's Concrete Com.
Ben and Jerry's Concrete Com.
Big Dog Supplies
Bill's Concrete
billy bob
Billy Bob's Concrete
Blah Blah
Bob
Bob & Tom's Subcontracting
Bob's Bicycle
Bob's Burgers
bob's concrete
Bob's concrete
Bob's Concrete
Bob's Concrete
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Bob's Concrete
Bob's Concrete

Form Completion

- ▶ Complete General and the Declaration Information sections
- ▶ The Title should house the name of the company utilized

The screenshot shows a web browser window with the following details:

- Browser: Mozilla Firefox
- URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=usd&fromSource=simple&fromModelId=1104&wftemplate_id=8188
- Page Title: Subcontractor/Supplier Declaration
- Section: General (circled in red)
- Form Fields:
 - Organization: Department of Administrative Services
 - Project Number: OCI-090004
 - Project Name: OAKS CI Training 4
 - Project Location: 4200 Surface Road
 - Title: Katie's Consulting (*) (circled in red)
 - Record Number: [Empty]
 - Creation Date: [Empty]
 - Creator: Katie Tuttle
 - Status: [Empty]
 - Contract Name: [Empty]
 - Contractor Name: Amazing Architectural Inc.
 - Professional Services Agreement Name: Test Agreement #1
 - Type: Consultant (*)
 - Subcontractor/Supplier: Katie's Consulting (*)
 - Federal Tax ID: 99-9999999 (*)
 - Primary Officer 1: Katie Tuttle (*)
 - Address Line 1: 30 W. Spring St. (*)
 - Address Line 2: [Empty]
 - City: Columbus (*)
 - State: Ohio (*)
 - ZIP: 43215 (*)
 - Contact Person: Katie Tuttle (*)
 - Phone No.: 614-644-2211 (*)
 - Fax No.: n/a (*)
 - E-mail Address: katie.tuttle@ofcc.ohio.gov (*)
- Section: Declaration Information (circled in red)
- Action Details:
 - Submit button
 - To: Archana Atrey, Barbara Taylor, Bill Schwertfager
 - Cc: [Empty]
 - Send For: PM Declaration Review
 - Task Notes: [Empty]
 - Workflow Progress: [Empty]
- Footer: Attachments (0), Linked Records (0), General Comments, Linked Mail (0)

Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub

Required fields have a red asterisk (*)

Form Completion

- ▶ Scroll down the form to complete the Additional Details block

The screenshot shows a web browser window with the following details:

- Browser Title:** Subcontractor/Supplier Declaration - Katie's Consulting - Project No. OCI-090004 - Mozilla Firefox
- URL:** https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=usd&fromSource=simple&fromModelId=1104&wftemplate_id=818&
- Workflow Actions:** Submit, Send, Save, Spelling, Undo Accept Task, Add Attachment, Discussion, Close Window
- Form Title:** Subcontractor/Supplier Declaration
- General Section:**
 - Primary Officer 1: *
 - Address Line 1: *
 - Address Line 2:
 - City: *
 - State: *
 - ZIP: *
 - Contact Person: *
 - Phone No.: *
 - Fax No.: *
 - E-mail Address: *
- Additional Details Section:**
 - Subcontractor/P.O. Date: *
 - Subcontractor/P.O. Amount \$: *
 - EDGE Certified Sub?: *
 - EDGE Certification Number: *
 - MBE: *
- Action Details Section:**
 - Submit: Archana Atrey, Barbara Taylor, Bill Schwertfager
 - Cc...:
 - Send For: PM Declaration Review
 - Task Notes:
 - Workflow Progress:
- Footer:** Attachments (0), Linked Records (0), General Comments, Linked Mail (0)

A red callout box with a red arrow points to the 'EDGE Certified Sub?' field, containing the text: "If EDGE Certified Sub is YES, the EDGE Certification Number must be filled in."

Send the Declaration for Review

- ▶ Add any attachments as necessary
- ▶ Verify Workflow Action
- ▶ Click Send

Subcontractor/Supplier Declaration - Katie's Consulting - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=usd&fromSource=simple&fromModelId=1104&wftemplate_id=818&

File Edit View Actions Help

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

Subcontractor/Supplier Declaration

General

Primary Officer 1: Katie Tuttle *

Address Line 1: 30 W. Spring St. *

Address Line 2: *

City: Columbus *

State: Ohio *

ZIP: 43215 *

Contact Person: Katie Tuttle *

Phone No.: 614-644-2211 *

Fax No.: n/a *

E-mail Address: katie.tuttle@ofcc.ohio.gov *

Additional Details

Subcontractor/P.O. Date: 03/24/2017 05:00 PM (UTC-8) *

Subcontractor/P.O. Amount \$: 500,000.00

EDGE Certified Sub?: Yes *

EDGE Certification Number: 123456789

MBE: Yes

Action Details

Submit

To... Archana Atrey, Barbara Taylor, Bill Schwertfager

Cc...

Send For: PM Declaration Review

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

Once Workflow Action has been selected, note that the "to" box is now populated with the next person in the workflow

PM Declaration Approval Step

Project Manager (PM)

- ▶ Reviews the record and performs one of the following Workflow Actions:
 - ▶ **Return for Clarification:** Requests more information from the Associate (A/E)
 - ▶ **Recommend Approval:** Approves the records and sends it to the Contracts Administrator or Project Coordinator for Validation

PC Declaration Validation Step

- ▶ Project Coordinator (PC)
 - ▶ PC will review and Validate record
 - ▶ PC will attach any necessary documentation
 - ▶ Workflow Options:
 - ▶ Validated
 - ▶ Return for Clarification
 - ▶ Return for Subcontract
(Gives the PC the ability to return to the A/E for Subcontract attachment)
 - ▶ Reject

Validation

- ▶ Once the Subcontractor/Supplier Declaration is validated it will go to the Complete/End Step
- ▶ Note: To add a sub to the Agreement or to an Amendment, the Subcontractor/Supplier Declaration must be created and in the **Completed** status.

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211