



Submittals Review

Agency/Higher-Ed

Purpose

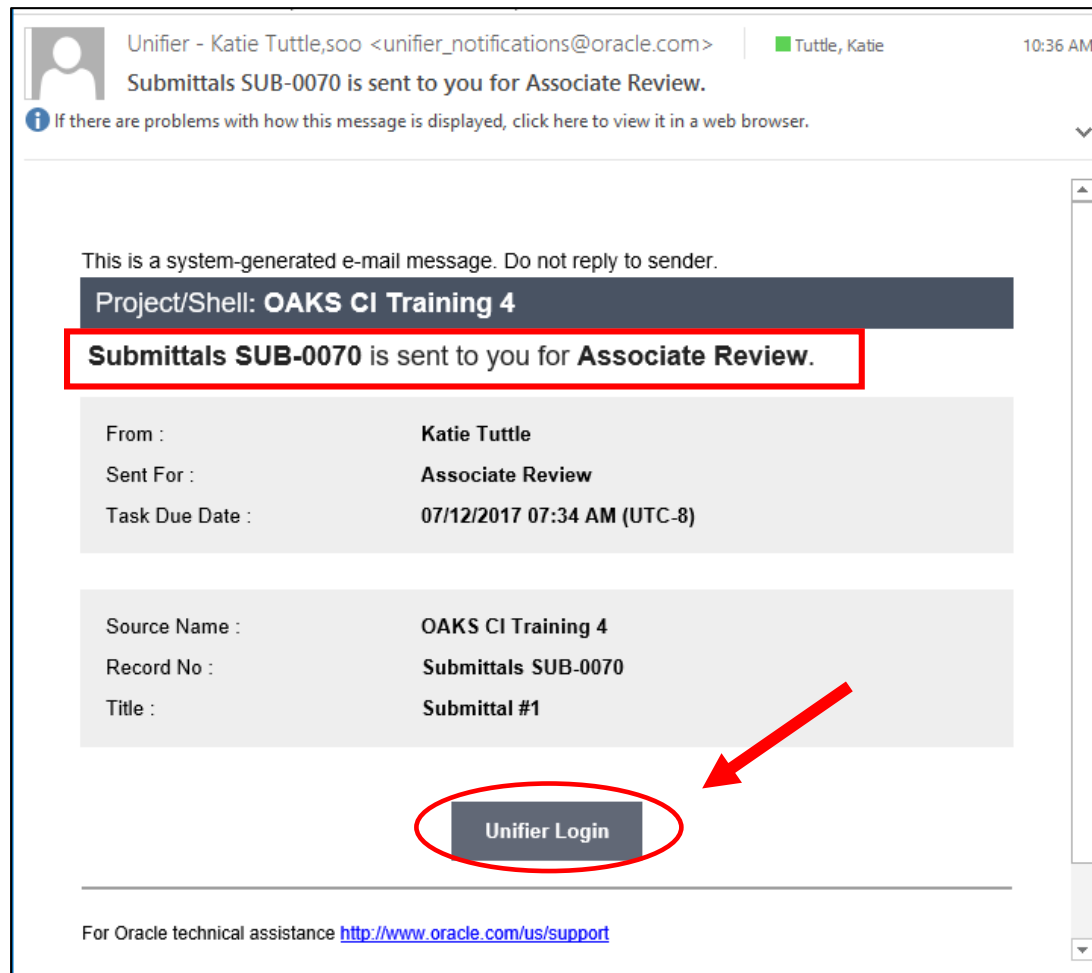
- ▶ The purpose of the Submittals BP is to provide a means for managing and tracking the various forms of submittals required for a successful construction project.

- ▶ Workflow

Created by: Contractor → Submitted to: Associate (A/E) Review → Sent to: Contractor Update (if necessary) → Sent to: Consultant Review (if necessary) → Sent to: Hold Notice Notification

Associate Review

- ▶ The Associate will receive an email notification that they have a Submittal for Review
- ▶ Click on the “Unifier Login” button to access the task



Associate Review

- ▶ Click Accept Task

Submittals - Submittal #1 - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=406&model=us1&fromcostlog=1&project_id=1021&nfl=C

File Edit View Actions Help

Accept Task Decline Task Review Close Window

Submittals

General

Organization: Department of Administrative Service Record Number: SUB-0070
Project Number: OCI-090004 Creator: Katie Tuttle
Project Name: OAKS CI Training 4 Creation Date: 06/28/2017 07:35 AM (UTC-8)
Project Location: 4200 Surface Road Status: Pending
Title: Submittal #1 Due Date:

Task Details

From: [Katie Tuttle](#) Task Due Date: 07/12/2017 Task Notes (0)
To: [Associate:Archana Atrey](#) More.. Task Status: Not Started Workflow Progress
Cc: [Project Manager:Archana Atrey](#) More..
Sent For: Associate Review

Submittals List

Attachment Index: (1) Current View: All Display Attachments with Comment

New Rename Move Delete 1 Item(s) Page 1 of 1

| Attachments | Name | Line Item Status | Status Date | Variation? | Type |
|-------------|------------------------|------------------|-------------|------------|------|
| | password expiring.docx | Submitted | | No | |

Comments Download Find References

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

Associate Review

- ▶ Review the Submittal record, Attachments and any submittal items received by courier or other means for conformance with Contract requirements
- ▶ All electronic submissions will automatically record the Sent and Received Dates
- ▶ Double click the attachment to edit the line status

Submittals - Submittal #1 - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187947&model=us1&project_id=1021&initiateBP=&bull

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Discussion Review Close Window

General Submittals

Organization: Department of Administrative Service Record Number: SUB-0070

Project Number: OCI-090004 Creator: Katie Tuttle

Project Name: OAKS CI Training 4 Creation Date: 06/28/2017 07:35 AM (UTC-8)

Project Location: 4200 Surface Road Status: Pending

Title: Submittal #1 Due Date:

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:
Workflow Progress

Submittals List

Attachment Index:(1) Current View: All Display Attachments with Comment

New Rename Move Delete 1 Item(s) Page 1 of 1

| Name | Line Item Status | Status Date | Variation? | Type |
|------------------------|------------------|-------------|------------|------|
| password expiring.docx | Submitted | | No | |

Add Copy Import Remove Comments Download

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

Associate Review

- ▶ The default status will read Submitted
- ▶ Enter new Line Item Status from the dropdown menu
- ▶ Enter the Status Date when one of the four final review determinations is entered
- ▶ Click “Save & Close”

Line Item - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/document/itemopen?dg_form=&

Spelling... Attachment Comments Revise

Submittals Line Item:

Name: password expiring.docx *

Date Answer Requested: [Calendar Icon]

How Was It Sent?: -Select-

Type: -Select-

Variation from Contract Documents?:

Description of Variation: [Text Area]

Line Item Status: Submitted

Status Date: Conforms

Conforms as Noted

Held

No Action Required

Received

Rejected

Requested

Revise & Resubmit

Submitted

Non-Electronic Submissions

Sent Date: [Calendar Icon]

Notes

Notes: [Text Area]

Linked Records (0)

Save & Close Cancel << >>

Associate Review

- ▶ Notice that the line item status has changed from “Submitted” to “Conforms as Noted”

The screenshot shows a web browser window titled "Submittals - Submittal #1 - Project No. OCI-090004 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187947&model=us1&project_id=1021&initiateBP=&bull. The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with options like Send, Save, Spelling, Discussion, Review, and Close Window.

The main content area is divided into sections:

- General**: Contains fields for Organization (Department of Administrative Service), Project Number (OCI-090004), Project Name (OAKS CI Training 4), Project Location (4200 Surface Road), Title (Submittal #1), Record Number (SUB-0070), Creator (Katie Tuttle), Creation Date (06/28/2017 07:35 AM (UTC-8)), Status (Pending), and Due Date.
- Action Details**: Includes a link to view latest content, a "To..." field, a "Cc..." field, and a "Send For:" field. It also has "Task Notes" and "Workflow Progress" links.
- Submittals List**: Shows an attachment index with 1 item. The current view is "All". The attachment list is as follows:

| Name | Line Item Status | Status Date | Variation? | Type |
|------------------------|-------------------|-------------|------------|------|
| password expiring.docx | Conforms as Noted | | No | |

A red arrow points to the "Line Item Status" column, and a red box highlights the "Conforms as Noted" status for the "password expiring.docx" attachment. Below the table are buttons for Add, Copy, Import, Remove, Comments, and Download. At the bottom, there are links for "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Associate Review

- ▶ Choose the appropriate workflow action:
 - ▶ Accepted -> Record goes to the End step
 - ▶ Send for Consultant Review
 - ▶ Return for Clarification -> Goes back to the Contractor
 - ▶ Send Hold Notice
- ▶ Click Send

The screenshot shows a web browser window titled 'Submittals - Submittal #1 - Project No. OCI-090004 - Mozilla Firefox'. The address bar shows a URL from 'ohio-dev-unifier.oracleindustry.com'. The browser's menu bar includes 'File', 'Edit', 'View', 'Actions', and 'Help'. A red box highlights the 'Workflow Actions' dropdown menu, which is open and shows options: 'Accept', 'Send for Consultant Review', 'Return for Clarification', and 'Send Hold Notice'. A red arrow points to the 'Send' button next to the dropdown. The main content area is titled 'Submittals' and contains a form with the following fields: 'Project Name: OAKS CI Training 4', 'Project Location: 4200 Surface Road', 'Title: Submittal #1', 'Record Number: SUB-0070', 'Creator: Katie Tuttle', 'Creation Date: 06/28/2017 07:35 AM (UTC-8)', 'Status: Pending', and 'Due Date:'. Below the form is the 'Action Details' section, which includes a 'To...' field, a 'Cc...' field with the value 'Archana Atrey, Barbara Taylor, Bill Schwertfager', and a 'Send For:' dropdown set to 'End'. The 'Submittals List' section at the bottom shows an 'Attachment Index' with one item: 'password expiring.docx' with a status of 'Conforms as Noted'. The interface also includes navigation buttons like 'Add', 'Copy', 'Import', 'Remove', 'Comments', and 'Download'.

Questions?

Please contact OAKS CI Support Desk:

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