



# Application for Payment (A/E, CxA, OA) K-12 Cloud

# Application for Payment Creation

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Application for Payment K-12
  - ▶ Click New

The screenshot displays the Oracle Primavera Unifier web interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier'. Below this, there are browser tabs for 'Home', 'Talawanda-CSD...', and 'Brown-LSD-CAR...'. The main interface is divided into a left sidebar and a main content area. The sidebar contains a 'User' section with a dropdown menu. The 'Logs' option is circled in red, and a red arrow points to it. Below the sidebar, the main content area shows a table titled 'Applications for Payment K12 - Current View: All'. The table has 9 items and is displayed on page 1. The table columns are 'Title', 'Contract SOV', and 'Contractor Name'. The table data is as follows:

Title	Contract SOV	Contractor Name
AE - Pay App 01	AE - FMD - SOV	FMD Architects Inc.
Steve Test	AE - FMD - SOV	FMD Architects Inc.
Test 5	Manual Test	Osborn Engineering
Test 5	Manual Test	Osborn Engineering
ADK Test 4	Manual Test	Osborn Engineering
ADK Test 3	Manual Test	Osborn Engineering
ADK Test 2	Manual Test	Osborn Engineering
ADK Test	AE - FMD - SOV	FMD Architects Inc.
AE - Pay App 01 Withdrawn	AE - FMD - SOV	FMD Architects Inc.

# Complete General Block

- ▶ All fields marked with a red \* are required
- ▶ Fill out any additional information

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

- Browser: Google Chrome
- Page Title: Create New Applications for Payment K12 - Project No. SFC-080001
- URL: [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=2969&module\\_name=uafpk&csvimport=fa](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2969&module_name=uafpk&csvimport=fa)
- Page Header: Applications for Payment K12
- Instructions: Complete the General, Certified Payroll, and Previous Pay Request blocks; then complete the Pay Request Details on the lower form by clicking Add.

**General Block Fields:**

Project Name:	OAKS CI District Training Project 1	Record Number:	
Project Number:	SFC-080001	Creator:	Katie Tuttle
Organization Name:	OAKS CI District Training Project - 1	Creation Date:	
Facility Name:		Status:	
Title:	Test Application for Payment *	Request Date:	
Contract Reference:	03 District Training Select... *	Vendor Name:	Dynamix Engineering
Final Payment?:	No *	EDGE Certified Prime?:	
Retainage Release Requested?:	-Select-	Contract Type:	CM at Risk
Period From:	11/23/2015 *	Period To:	12/01/2015 *
Internal Ref. Number:		Associate Approval Date:	

**Certified Payroll Block:**

Create a Certified Payroll record containing all data associated with this pay request and set the status to Complete. Select the record here.

Certified Payroll:	Select...		
Pay Request Period Start:		Pay Request Period End:	

**Bottom Navigation:**

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

# Previous Pay Request

- ▶ Select whether this is the initial pay request
- ▶ If not, click select to choose previous pay request. **Very Important!**

The screenshot displays the Oracle Applications for Payment K12 interface. The main window is titled "Create New Applications for Payment K12 - Project No. SFC-080001 - Google Chrome". The URL is [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=2969&module\\_name=uafpk&csvimport=fa](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2969&module_name=uafpk&csvimport=fa). The "General" tab is active, showing the "Applications for Payment K12" form. A red box highlights the "Previous Pay Request" section, which contains the following fields:

- Initial Pay Request?: No (dropdown)
- Previous Pay Request: [ ] Select... (text field with button)
- Period From: [ ] (text field)

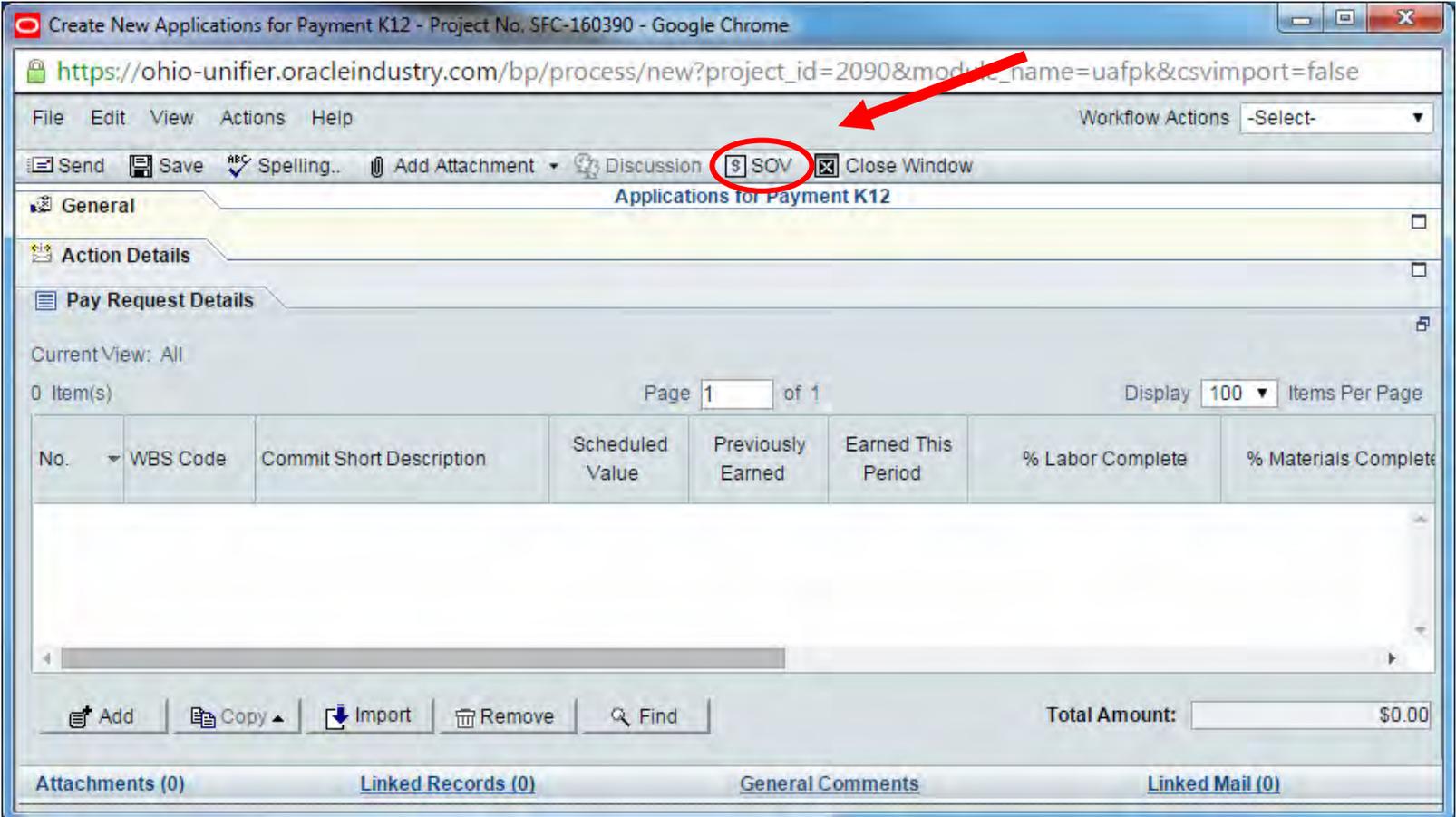
A red arrow points from the "Select..." button to a smaller window titled "Applications for Payment K12 - Google Chrome". This window shows a picker interface with the URL <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/picker?model=uafpk&pick>. The picker displays a table of "Applications for Payment K12 - Current View: All Project Records" with 3 items.

Title	Contract SOV	Contractor Name	Percent Complete	Total Payment Requested
03 District Training PR 02	03 District Training	Dynamix Engineering	0	30,000.00
03 District Training PR 01	03 District Training	Dynamix Engineering	0	20,000.00
SFC-080001-02-01 PR 1	SFC-080001-02-01	Dynamix Engineering	0	115,000.00

The main interface also shows sections for "Stored Materials Summary" (On Site, Off Site, Installed, Previous, This Period) and "Earned Current Request".

# Review SOV

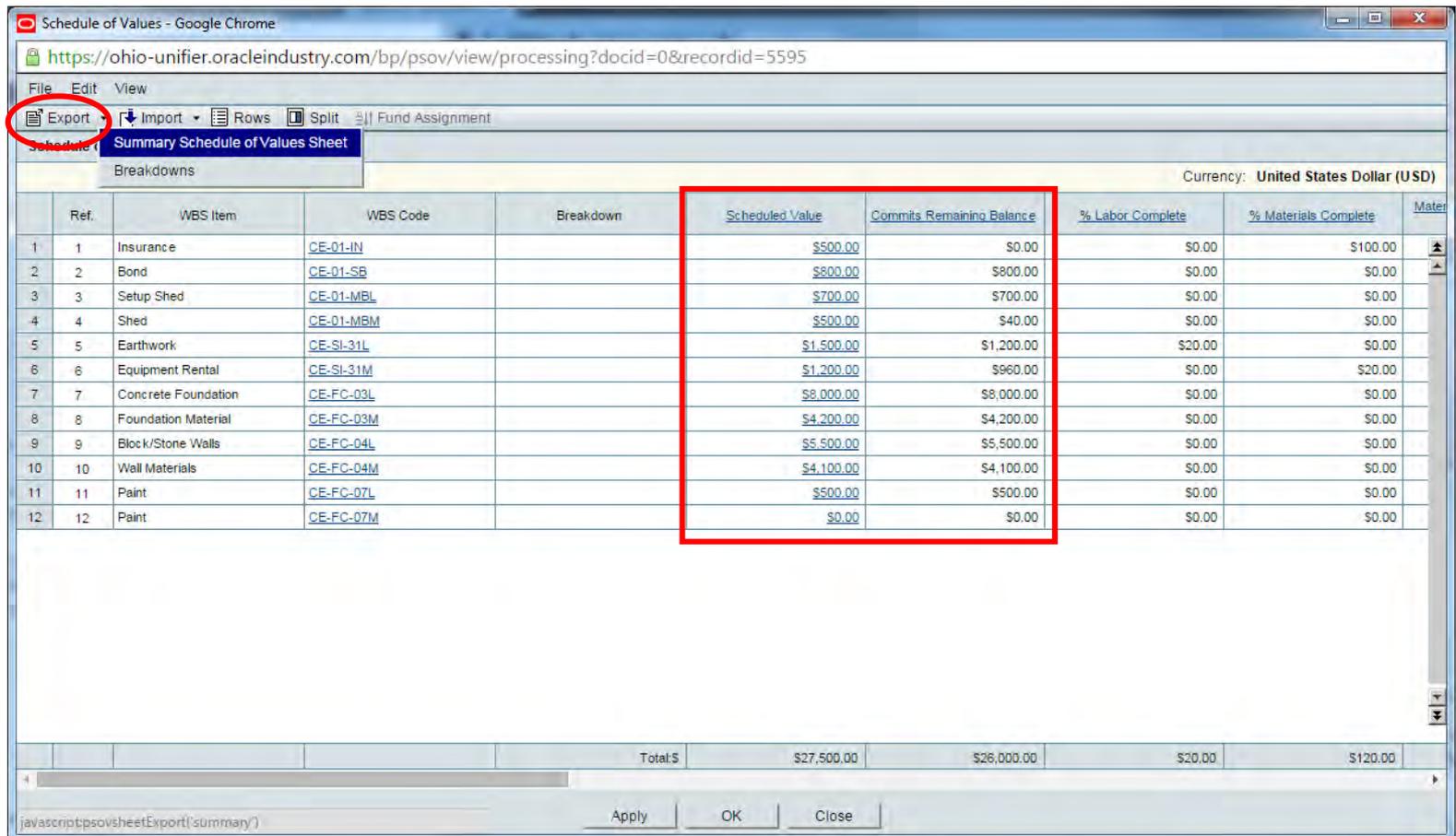
- ▶ Prior to adding lines to your pay request, you may want to view the remaining balance on your SOV (Schedule of Values)
- ▶ Click SOV at the top of your window



The screenshot displays the Oracle Unifier web application interface. The browser title is "Create New Applications for Payment K12 - Project No. SFC-160390 - Google Chrome". The URL is [https://ohio-unifier.oracleindustry.com/bp/process/new?project\\_id=2090&module\\_name=uafpk&csvimport=false](https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=2090&module_name=uafpk&csvimport=false). The top menu bar includes "File", "Edit", "View", "Actions", and "Help". The "Workflow Actions" dropdown is set to "-Select-". The main menu bar contains "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The "SOV" option is circled in red, and a red arrow points to it from the right. Below the menu bar, the page title is "Applications for Payment K12". The left sidebar shows "General", "Action Details", and "Pay Request Details". The main content area shows "Current View: All", "0 Item(s)", "Page 1 of 1", and "Display 100 Items Per Page". A table with the following columns is visible: "No.", "WBS Code", "Commit Short Description", "Scheduled Value", "Previously Earned", "Earned This Period", "% Labor Complete", and "% Materials Complete". The table is currently empty. At the bottom, there are buttons for "Add", "Copy", "Import", "Remove", and "Find". The "Total Amount" is displayed as "\$0.00". At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# Review SOV

- ▶ This allows you to look at the Scheduled Value and Commits Remaining Balance for each of the line items on your SOV
- ▶ You can also export the SOV to Excel by clicking Export and choosing the Summary Schedule of Values Sheet



Screenshot of a web browser displaying a Schedule of Values (SOV) table. The browser window title is "Schedule of Values - Google Chrome" and the URL is "https://ohio-unifier.oracleindustry.com/bp/psov/view/processing?docid=0&recordid=5595". The browser menu is open, showing "Export" circled in red. A red arrow points to the "Export" button. The table below shows 12 line items with columns for Ref., WBS Item, WBS Code, Breakdown, Scheduled Value, Commits Remaining Balance, % Labor Complete, and % Materials Complete. A red box highlights the "Scheduled Value" and "Commits Remaining Balance" columns. The table is titled "Summary Schedule of Values Sheet" and "Breakdowns". The currency is "United States Dollar (USD)".

Ref.	WBS Item	WBS Code	Breakdown	Scheduled Value	Commits Remaining Balance	% Labor Complete	% Materials Complete	Material
1	Insurance	CE-01-IN		\$500.00	\$0.00	\$0.00	\$100.00	
2	Bond	CE-01-SB		\$800.00	\$800.00	\$0.00	\$0.00	
3	Setup Shed	CE-01-MBL		\$700.00	\$700.00	\$0.00	\$0.00	
4	Shed	CE-01-MBM		\$500.00	\$40.00	\$0.00	\$0.00	
5	Earthwork	CE-SI-31L		\$1,500.00	\$1,200.00	\$20.00	\$0.00	
6	Equipment Rental	CE-SI-31M		\$1,200.00	\$960.00	\$0.00	\$20.00	
7	Concrete Foundation	CE-FC-03L		\$8,000.00	\$8,000.00	\$0.00	\$0.00	
8	Foundation Material	CE-FC-03M		\$4,200.00	\$4,200.00	\$0.00	\$0.00	
9	Block/Stone Walls	CE-FC-04L		\$5,500.00	\$5,500.00	\$0.00	\$0.00	
10	Wall Materials	CE-FC-04M		\$4,100.00	\$4,100.00	\$0.00	\$0.00	
11	Paint	CE-FC-07L		\$500.00	\$500.00	\$0.00	\$0.00	
12	Paint	CE-FC-07M		\$0.00	\$0.00	\$0.00	\$0.00	
Total:				\$27,500.00	\$26,000.00	\$20.00	\$120.00	

# Review SOV

- ▶ This is how your SOV will look in Excel
- ▶ **Note:** This file is for reference only. It cannot be re-imported into OAKS CI

Line Item	WBS Item	WBS Code Breakdown	Scheduled Value	Commits Remaining Balance	% Labor Complete	% Materials Complete
1	Insurance	CE-01-IN	\$500.00	\$0.00	\$0.00	\$100.00
2	Bond	CE-01-SB	\$800.00	\$800.00	\$0.00	\$0.00
3	Setup Shed	CE-01-MBL	\$700.00	\$700.00	\$0.00	\$0.00
4	Shed	CE-01-MBM	\$500.00	\$40.00	\$0.00	\$0.00
5	Earthwork	CE-SI-31L	\$1,500.00	\$1,200.00	\$20.00	\$0.00
6	Equipment Rental	CE-SI-31M	\$1,200.00	\$960.00	\$0.00	\$20.00
7	Concrete Foundation	CE-FC-03L	\$8,000.00	\$8,000.00	\$0.00	\$0.00
8	Foundation Material	CE-FC-03M	\$4,200.00	\$4,200.00	\$0.00	\$0.00
9	Block/Stone Walls	CE-FC-04L	\$5,500.00	\$5,500.00	\$0.00	\$0.00
10	Wall Materials	CE-FC-04M	\$4,100.00	\$4,100.00	\$0.00	\$0.00
11	Paint	CE-FC-07L	\$500.00	\$500.00	\$0.00	\$0.00
12	Paint	CE-FC-07M	\$0.00	\$0.00	\$0.00	\$0.00

# Add Line Items

- ▶ Enter a line item corresponding to each item on the Schedule of Values (SOV) from the agreement for which payment is requested
- ▶ Click on the **Pay Request Details** Tab
- ▶ Click Add

The screenshot shows the Oracle Primavera P6 web interface for creating new applications for payment. The browser title is "Create New Applications for Payment K12 - Project No. SFC-160390 - Google Chrome". The URL is "https://ohio-unifier.oracleindustry.com/bp/process/new?project\_id=2090&module\_name=uafpk&csvimport=false". The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar, there are icons for "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The main content area is titled "Applications for Payment K12" and has several tabs: "General", "Action Details", and "Pay Request Details". The "Pay Request Details" tab is selected and circled in red. Below the tabs, there is a "Current View: All" section and a table with columns: "No.", "WBS Code", "Commit Short Description", "Scheduled Value", "Previously Earned", "Earned This Period", "% Labor Complete", and "% Materials Complete". The table is currently empty, showing "0 Item(s)". Below the table, there is a toolbar with buttons for "Add", "Copy", "Import", "Remove", and "Find". The "Add" button is circled in red, and a red arrow points to it. To the right of the toolbar, there is a "Total Amount:" field showing "\$0.00". At the bottom of the interface, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# Add Line Items

- ▶ Enter a short description
  - ▶ Enter the % complete in the % Services Complete column
- OR**
- ▶ For a DPE or Reimbursable enter the **dollar amount** under the DPE or Reimbursable Column

Line Items - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/opengrid?pref=ucsov&unit\_price\_check=1&from=&strModifiedRows=&model=uafpk&printable=5&coID=156

Split Cancel Row Changes

Line Items Page 1 of 1 Display 100 items per page

Ref.	SOV Reference Number	WBS Code *	WBS Item	Short Description *	Subcode	Scheduled Value	% Labor	% Materials	% Services Complete	DPE or Reimbursables(\$)
001		1 AE-BS-CA	Building 1			\$115,000.00	0	0	20	\$0.00
002		2 AE-BS-CA	Building 2			\$115,000.00	0	0	20	\$0.00
003		3 AE-BS-CA	Building 3			\$115,000.00	0	0	20	\$0.00
004		4 AE-BS-CA	Building 4			\$115,000.00	0	0	20	\$0.00
005		5 AE-BS-CA	Building 5			\$115,000.00	0	0	20	\$0.00
Total		0				\$575,000.00	0	0	100	\$0.00

OK Cancel

# Add Line Items

- ▶ Continue Adding Line Items as necessary
- ▶ Line item information displays in the Pay Request Details Pane
- ▶ **Please Note:** The **Earned this Period** column should **NEVER** reflect a negative amount

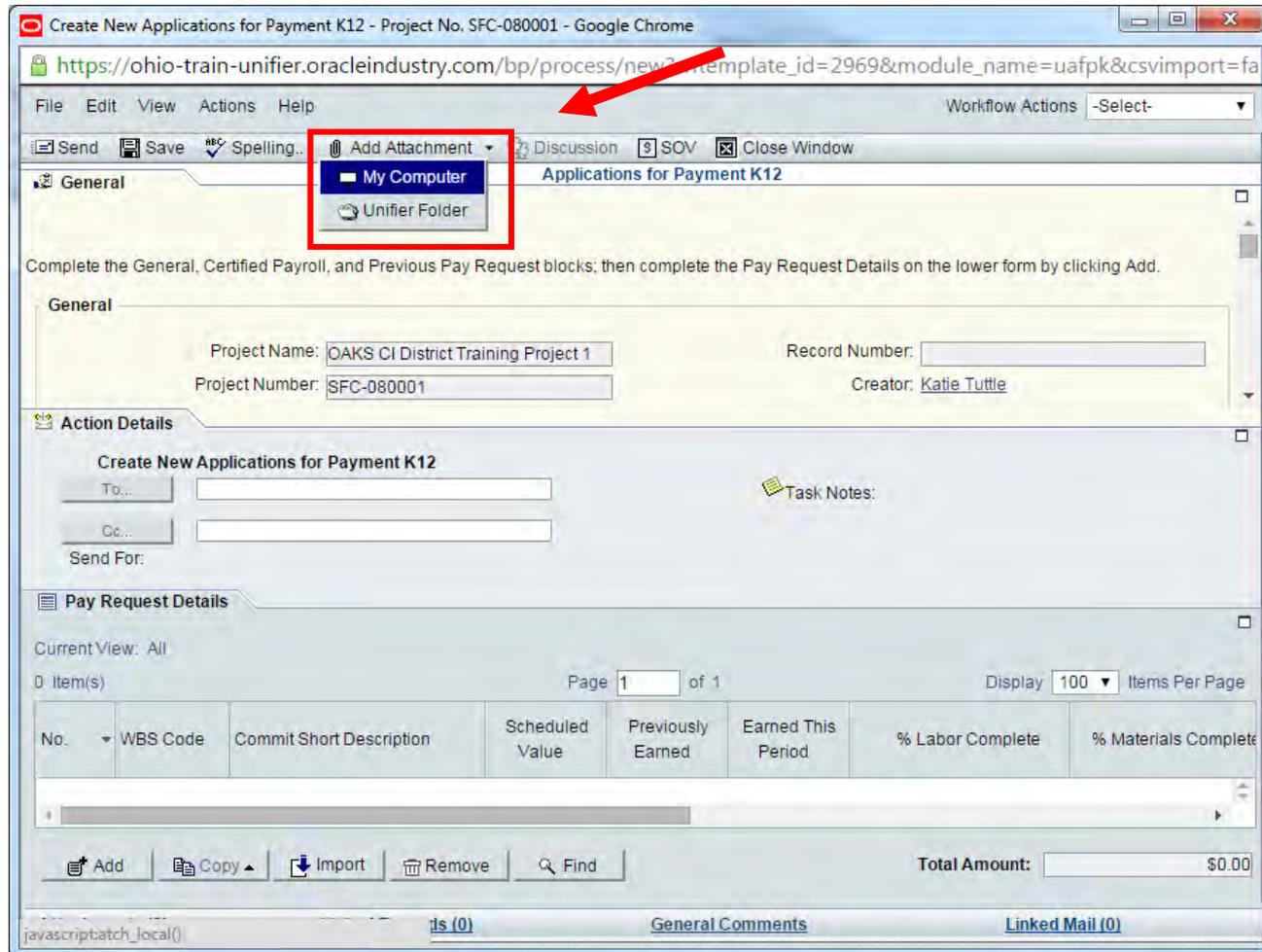
The screenshot shows the Oracle Applications for Payment K12 interface. The 'Pay Request Details' pane is active, displaying a table of line items. The table has the following columns: No., WBS Code, Commit Short Description, Scheduled Value, Previously Earned, Earned This Period, % Labor Complete, % Materials Complete, % Services Complete, and Re. The data rows are:

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	Re
003	AE-BS-CA	Building 5	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	
002	AE-BS-CA	Building 3	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	
001	AE-BS-CA	Building 1	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	

The 'Earned This Period' column is highlighted with a red box, and a red arrow points to it. At the bottom right, the 'Total Amount' field is also highlighted with a red box and shows a value of \$103,500.00.

# Add Attachments

- ▶ To add any additional documentation
  - ▶ Click Add Attachment
  - ▶ Choose My Computer and locate your documents
  - ▶ Drag and Drop documents to upload



# Submit Record

- ▶ Attachments populate at the bottom of your record
- ▶ Choose Workflow Action Submit
- ▶ Action Details will auto-populate the “to” field
- ▶ Click Send

Applications for Payment K12 - Test - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task\_id=156126&id=5522&sourceId=0&project...

File Edit View Actions Help

Workflow Actions Submit

Submit

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

Applications for Payment K12

General

Complete the General, Certified Payroll, and Previous Pay Request blocks; then complete the Pay Request Details on the lower form by clicking Add.

General

Project Name: OAKS CI District Training Project 1 Record Number:

Project Number: SFC-080001 Creator: Katie Tuttle

Organization Name: OAKS CI District Training Project - 1 Creation Date:

Action Details

Submit

To... Barbara Taylor,Katie Tuttle,Moenique Morris,R

Cc...

Send For: Review and Validation

Task Notes:

Pay Request Details

Current View: All

3 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	Re
003	AE-BS-CA	Building 5	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	
002	AE-BS-CA	Building 3	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	
001	AE-BS-CA	Building 1	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	

Total Amount: \$103,500.00

Add Copy Import Remove Find

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211