



K-12 District Staff

Welcome to OAKS CI, Cloud

Browser Information

- ▶ When using the OAKS CI system, we recommend using **Google Chrome** or **Mozilla Firefox**. These browsers will give you the best user experience in the system.



Job Aids

- ▶ For additional reference materials visit our website ofcc.ohio.gov
 - ▶ Click: OAKS CI -> Choose an Appropriate training

The screenshot shows the OFCC (Ohio Facilities Construction Commission) website. The browser address bar is ofcc.ohio.gov/OAKSCI.aspx. The navigation menu includes: About, Documents, Services / Programs, News / Events, Opportunities, **OAKS CI** (circled in red), Resources, and Gallery. A red arrow points to the 'OAKS CI' menu item. Below the navigation, the page title is 'OAKS Capital Improvements (OAKS CI)'. A breadcrumb trail shows 'You are here : OAKS CI'. The main content area is divided into three columns: 'Agency/Higher Ed', 'K-12 Cloud System', and 'K-12 Legacy System'. Each column contains two buttons: 'User Login' and 'Training'. A red box highlights the 'Agency/Higher Ed Training' button in the first column, with a red arrow pointing to it from the left. Below the main content is a 'Contacts & Forms' section with three sub-sections: 'OAKS CI Support' (email: OAKSCI@ofcc.ohio.gov, phone: 614.644.2211), 'OAKS CI Forms' (User Application for Access, Vendor Information Form, Project Information Form), and 'Additional Resources' (OAKS CI Fact Sheet, Agency/Higher Ed FAQs, K-12 Schools FAQs).

What does OAKS CI do for you?

- ▶ Tracks your project progress
- ▶ Automates workflows (based on Ohio Facilities Construction Commission forms and procedures)
- ▶ Allows for improved project communication and collaboration
- ▶ Housed in the Cloud so you can utilize any browsing tool to access
- ▶ Now includes DocuSign which minimizes time spent in OAKS CI

DocuSign Enabled Records

- ▶ The following records now utilize DocuSign (electronic signature)
 - ▶ Contracts
 - ▶ Amendments
 - ▶ Change Orders (Contract Modifications)
- ▶ Users who are sent a DocuSign document for signature will receive it via email. You do not require a DocuSign account.
- ▶ For more information about how to use DocuSign, please refer to the handout on the OFCC website.

School District Roles

School District staff currently have 5 roles available.

- ▶ **Treasurer** role will see all records in OAKS CI, however, will touch the following:
 - ▶ Contracts and Amendments
 - ▶ Record Misc. Commits (purchases made outside of the current contracts housed within the project) and Misc. Invoices
 - ▶ Record Purchase Orders and Vouchers (checks)
 - ▶ LFI MOU Funding Plan information

- ▶ **Owner Financial** role will see all records in OAKS CI, however, will touch the following:
 - ▶ Record Purchase Orders and Vouchers (checks)
 - ▶ Attach the Voucher (check) to Applications for Payment

School District Roles

- ▶ **District Superintendent** role will see all records in OAKS CI, however, will touch the following:
 - ▶ Contracts (via DocuSign, not in OAKS CI)
 - ▶ Provide District Acceptance for Change Orders (via DocuSign, not in OAKS CI)
 - ▶ LFI MOU District Signature
- ▶ **District Representative** role will see all records in OAKS CI, however, will touch the following:
 - ▶ Approve Applications for Payment
- ▶ **Owner View** role:
 - ▶ This role allows members of the organization to view a project without being an active participant

Introduction to OAKS CI

Using OAKS CI in the Cloud

– Important Links

- OAKS CI is now housed in a cloud-based system at the following URL:
 - <https://ohio-unifier.oracleindustry.com/bluedoor>
- Passwords for OAKS CI are now housed in a separate system called Oracle Identity Manager (OIM) which can be accessed here:
 - <https://ohio-primavera-idm.oracleindustry.com/oim>

Oracle Identity Manager (OIM)

- ▶ To reset your password or to set your security questions, login to the OIM website:
<https://ohio-primavera-idm.oracleindustry.com/oim>
- Type in your User ID and Password. This is the same as the login information you use for accessing OAKS CI.
- Click “Sign In”



Oracle Identity Manager (OIM)

- Once logged in, the system will prompt you to reset your password (if this is your first log in) and set your security questions
- Please be aware that your password will expire **every 60 days** and the system **will not** send you a reminder.
- Type in requested information and Click “Submit”. Then Click “Sign Out” to log out of OIM

File Edit View Favorites Tools Help
x Convert Select

Submit

ORACLE Identity Self Service

Password Management

Please reset your password.

* Old Password

* New Password

* Re-Type New Password

Register challenge questions for your account

* Question1 * Answer1

* Question2 * Answer2

* Question3 * Answer3

Old Password = Your current account password
New Password = A brand new password that you choose

Note: You will only utilize this site to change your password.
No other OAKS CI functions will take place here.

Navigating OAKS CI in the Cloud

Navigate to OAKS CI

- Open any web browser
Note: While testing we found that Google Chrome works best for us
- Navigate to: <https://ohio-unifier.oracleindustry.com/bluedoor>
- Enter your assigned Username and Password
- Click “Sign In”

Note: Please ensure that your pop-up blocker is disabled for this site



Cross Project Home Page

ORACLE PRIMAVERA Unifier Katie Tuttle Sign Out

Home Company Works... School Facilities Talawanda-CSD... Brown - New K-...

Navigate To...

User Admin

Home Tasks Messages Drafts uMail Master Log - Business Proces...

Announcements:

Title: Welcome
Welcome to the OAKS CI Training Environment.

Title: Security Notification
OAKS-CI is a State of Ohio computer system, which may be accessed and used only for official state business by authorized persons. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action.

Items Requiring Your Attention:

Tasks: 12 Total, 4 New, 0 Late
Messages: 1 New
Draft Records: 19 New
uMails: 0 New

Tasks or New uMails:

Project Number	Name	Tasks	uMails	Company
OCI-150041.03	Brown - New K-12 Second Chance	1 Total, 1 New, 0 Late		State of Ohio
OCI-150041.02	Brown - New K-12	2 Total, 1 New, 0 Late		State of Ohio
OCI-150041	Brown-LSD-CAR-ENP-2012	1 Total, 1 New, 0 Late		State of Ohio
OCI-150011.01	Unit Test Building 1	1 Total, 0 New, 0 Late		State of Ohio
OCI-140363.01	Talawanda- Kramer Elementary	7 Total, 1 New, 0 Late		State of Ohio

Locating your Project

The screenshot shows the Oracle Primavera Unifier web application. At the top, the user is identified as Katie Tuttle. The search bar contains the text 'Talawanda'. A red box highlights the search bar with the instruction: 'Type in the name of the school or project and click on the name of the project to open it'. Below the search bar, a table of 'Matched Locations' is displayed:

OCI-140363	Talawanda-CSD-BUT-CFAP-1-2013	/School Facilities
OCI-140363.01	Talawanda- Kramer Elementary	/Scho ... -2013

Below this, a 'Key Locations' section is visible. The main content area displays a 'Security Notification' and a table of 'Tasks or New uMails':

Project Number	Name	Tasks	uMails	Company Name
OCI-150041.03	Brown - New K-12 Second Chance	1 Total, 1 New, 0 Late		State of Ohio
OCI-150041.02	Brown - New K-12	2 Total, 1 New, 0 Late		State of Ohio
OCI-150041	Brown-LSD-CAR-ENP-2012	1 Total, 1 New, 0 Late		State of Ohio
OCI-150011.01	Unit Test Building 1	1 Total, 0 New, 0 Late		State of Ohio
OCI-140363.01	Talawanda- Kramer Elementary	7 Total, 1 New, 0 Late		State of Ohio

On the right side, there is a section titled 'Items Requiring Your Attention' with the following counts:

- Tasks: 12 Total, 4 New, 0 Late
- Messages: 1 New
- Draft Records: 19 New
- uMails: 0 New

District Level Project and Building Level Project(s)

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The breadcrumb trail shows the path: Home > Company Works... > School Facilities > Talawanda-CSD... > Brown - New K... > Talawanda-CSD-BUT-CFAP-1-2013 - Home. The left sidebar contains a navigation menu with items like Alerts, uMail, Mailbox, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. The main content area is divided into several sections: a 'Summary' section with an 'Image' placeholder, a 'Details' section with project metadata, an 'Items Requiring Your Attention' section with counts for Tasks, Messages, Draft Records, and uMails, and a 'Links' section with external links. Below these sections is a table titled 'Building Project - Current View: All' showing one item. The table has columns for Number, Name, Setup Date, Setup Template, and Status. The data row is highlighted with a red box. A red arrow points from this row to a callout box at the bottom right.

Talawanda-CSD-BUT-CFAP-1-2013 - Home

Summary

Image

Details

OAKS Code: OCI-140363
District Project Identifier: Talawanda-CSD-BUT-CFAP-1-2013
Description: Build new Kramer Elementary School
Administrator: Katie Tuttle
Currency: United States Dollar (USD)
Status: Active
Email Address: ohio_unifier_stage+1106@oracleindustv.com

Items Requiring Your Attention

Tasks: 0, New 0, Late 0
Messages: 0 New
Draft Records: 0 New
uMails: 0 New

Links

[Ohio Facilities Construction Commission](#)
[Ohio School Facilities Commission](#)

Building Project - Current View: All

1 Item(s) Page 1 of 1 Display 100 Items Per Page

Number	Name	Setup Date	Setup Template	Status
OCI-140363.01	Talawanda- Kramer Elementary	08/31/2015	OSFC Building CMR Template	Active

Within your District Project, you will be able to locate your Building Project(s).

District Level Project

- ▶ The District Level Project houses all records related to your Professional Service Providers
- ▶ Such as: A/E, Commissioning Agent, Owner's Agent

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The breadcrumb trail shows 'Home > School Facilities > Talawanda-CSD...'. The left sidebar contains a navigation menu with 'User' and 'Admin' sections. The 'Contract K12' menu item is highlighted. The main content area shows a table of contract records for 'Contract K12 - Current View: All'. The table has columns for 'Contract No.', 'Contractor Name', 'Title', and 'Original Contract Completion Date'. Two records are listed, with the second record highlighted by a red box.

Contract No.	Contractor Name	Title	Original Contract Completion Date
SFC-140363	Heapy Engineering	CxA Heapy Engineering	
2014025.00	SHP Leading Design	Talawanda CSD - Kramer AE Contract	

Building Level Project

- ▶ The Building Level Project houses all records related to your CMR/Contractor

The screenshot displays the Oracle Primavera Unifier web interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and user information 'Katie Tuttle' with a star icon, a help icon, and a 'Sign Out' link. Below this is a breadcrumb trail: 'Home > School Facilities > Talawanda-CS... > Talawanda- Kra...'. The left sidebar contains a navigation menu with categories 'User' and 'Admin'. Under 'Admin', 'Talawanda- Kramer Elemen...' is highlighted with a red box. Other items include Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, and Logs. The main content area shows a table titled 'Contract K12 - Current View: All'. The table has 2 items and is on page 1 of 1. The table columns are Contract No., Contractor Name, Title, and Original Contract Completion Date. A red box highlights the first row of data.

Contract No.	Contractor Name	Title	Original Contract Completion Date
SFC-140363.01-CMR 65555555	Robertson Construction Services, Inc Robertson Construction Services, Inc	Robertson Construction - CMR Katie's Contracting	01/22/2015

Project Home Page

ORACLE PRIMAVERA Unifier

Katie Tuttle Sign Out

Home Company Works... School Facilities Talawanda-Kra... Brown - New K...

Navigate To... School Facilities Talawanda-CS... Talawanda-Kra...

User Admin

Talawanda-Kramer Elementa...

Alerts

uMail

Collaboration

Information

Cost Manager

Data Manager

Document Manager

Logs

Reports

Talawanda-Kramer Elementary - Home

Summary

Image

Details

Number: OCI-140363.01

Name: Talawanda-Kramer Elementary

Description: Build New Kramer Elementary School

Administrator: Katie Tuttle

Currency: United States Dollar (USD)

Status: Active

Email Address: ohio_unifier_stage+1107@oracleindustry.com

View Dashboard My Dashboard

Most work is completed in 3 areas:

- Collaboration- Your Work**
- Logs- Where records are housed and created**
- Document Manager- Houses supporting documentation**

Collaboration– All About You!

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, the product name 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The browser tabs show 'Home', 'Company Works...', 'School Facilities', 'Talawanda- Kra...', and 'Brown - New K...'. The main content area is titled 'Talawanda-Kramer Elementary - Home' and features a 'Summary' tab. A red callout box with a red arrow pointing to the 'Collaboration' menu item in the left sidebar contains the text: 'Collaboration houses: - Tasks - Messages - Drafts'. The 'Items Requiring Your Attention' section shows: 'Tasks: 7, New 1, Late 0', 'Messages: 0 New', 'Draft Records: 7 New', and 'uMails: 0 New'. The 'Details' section provides project information: 'Number: OCI-140363.01', 'Name: Talawanda-Kramer Elementary', 'Description: Build New Kramer Elementary School', 'Administrator: Katie Tuttle', 'Currency: United States Dollar (USD)', 'Status: Active', and 'Email Address: ohio_unifier_stage+1107@oracleindustry.com'.

Collaboration houses:

- Tasks
- Messages
- Drafts

Tasks (Your Records)

The screenshot displays the Oracle Primavera Unifier application interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. Below this, there are browser tabs for 'Home', 'Company Works...', 'School Facilities', 'Talawanda- Kra...', and 'Brown - New K...'. The main content area shows a 'Tasks' view with a table of 7 items. The table columns are: Type, Number, Title, Re Du, From, Sent for, Task Due, Received, and Workflow Nar. A red arrow points from a text box to the 'Tasks' menu item in the left sidebar.

Type	Number	Title	Re Du	From	Sent for	Task Due	Received	Workflow Nar
Miscellaneous Commit K12	MC-0003	Misc. C		Katie Tuttle,so	Funding Certification		05/06/2016	Miscellan
Miscellaneous Invoice K12	MI-0001	Test Inv		Katie Tuttle.soc	Payment Processing		05/06/2016	Miscellane
Miscellaneous Commit K12	MC-0002	Misc. C		Katie Tuttle.soc	Funding Certification		05/04/2016	Miscellane
Design Reviews K12	DR-001			Katie Tuttle.soc	Detailed Review		04/15/2016	Design Re
Subcontractor/Supplier Declarations	SMSD-003	OAKS C		Katie Tuttle.soc	Subcontract Attachment		04/12/2016	Subcontra
Contract K12	CON-001	Katie's I		Katie Tuttle.soc	School District Contract E		04/07/2016	Best Value
Contract Modification K12	CM-0003	Test dis		Katie Tuttle.soc	Contractor Review		04/01/2016	V2.0 - GMF

Tasks: Any work that comes to you for approval or review

Messages

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL: https://ohio-stage-unifier.oracleindustry.com/bp/g/nav/index?_uref=uuu347. The page header includes the Oracle and Primavera logos, the user name 'Katie Tuttle', and a 'Sign Out' link. The main content area shows a navigation pane on the left with a 'Messages' menu item highlighted. The main pane displays a list of 12 messages with columns for Type, From, Subject, and Received Date.

Type	From	Subject	Received Date
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	09/14/2009
Action Items	Consultant Student5,s	AI-00039: George's Visit	08/13/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0023: Waterspout Widgits	07/21/2009
Submittals	Fred Holcomb,soo	SUB-0002: Fred Submittal #1	05/26/2009
Submittals	Fred Holcomb,soo	SUB-0002: Fred Submittal #1	05/26/2009
Contract Schedule of Values	Steve Mayo,soo	CSOV-0003: Plumbing Prime - Oak	04/15/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0003: Fred Sum Dec 1	04/10/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0002: Approved Componete &	04/04/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0002: Approved Componete &	04/04/2009
Contract Schedule of Values	Fred Holcomb,soo	CSOV-0002: General Prime 2 - San	04/04/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	04/02/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	04/02/2009

Messages: Any tasks you have been carbon copied on, no action required

Drafts

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL: https://ohio-stage-unifier.oracleindustry.com/bp/g/nav/index?_uref=uuu347. The page header includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The left sidebar contains a navigation menu with the following items: User, Admin, Talawanda- Kramer Elementar..., Alerts, uMail, Collaboration, Tasks, Messages, Drafts (highlighted with a red arrow), Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. The main content area shows a table of Drafts with the following data:

Type	Number	Title	Last Saved
Action Items K12		Test Action Item	05/06/2016
Miscellaneous Invoice	MI-0001	Test Invoice	05/06/2016
Miscellaneous Invoice		Test Invoice	05/06/2016
Contract Schedule of V		Test SOV	04/12/2016
Contract K12	CON-001	Katie's Contracting	04/07/2016
Subcontractor/Supplie			03/31/2016
Applications for Payme		PR Test 1-25-16	01/25/2016

Drafts: Unfinished records you have created and saved

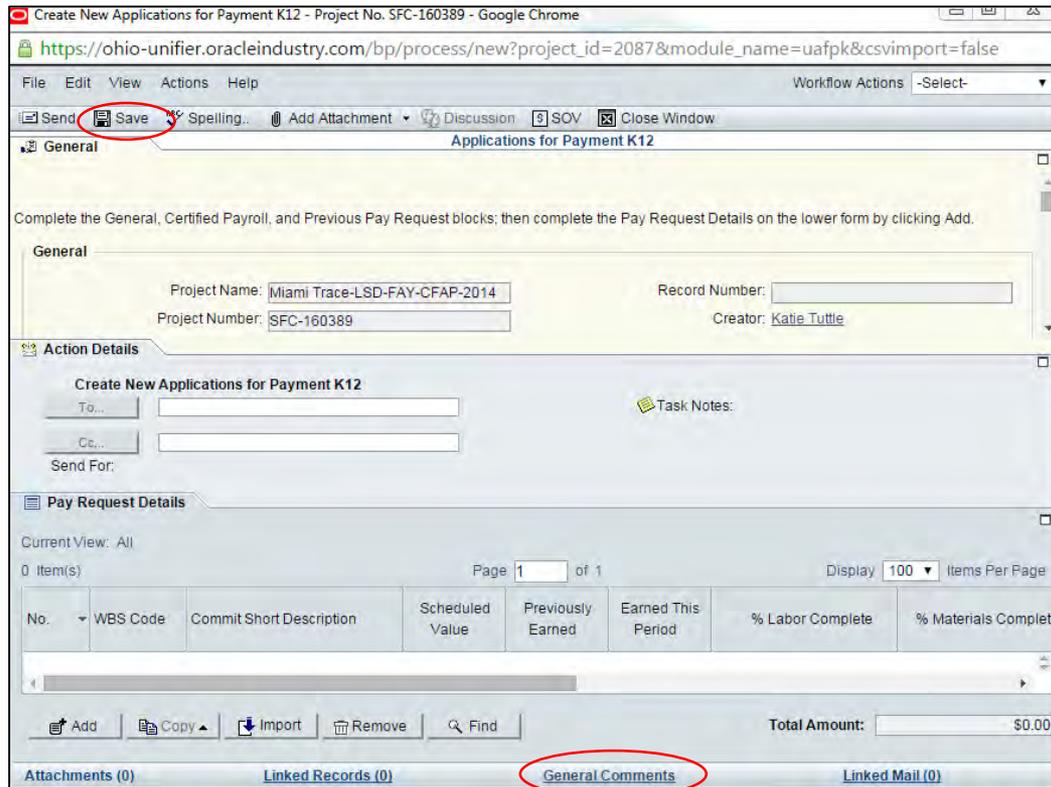
Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

- ▶ All unsaved work will be lost
- ▶ No warning will be given



Use "Save" if needed to save work as a draft



Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you're typing extensive notes, first type them in a Word doc then copy and paste into General Comments

Logs

Logs house Business Processes or “BPs” (Records)

- ▶ A BP is any Record that has been created (i.e. Pay Requests, Submittals, etc.) and submitted through a workflow for review or approval.

Users will see the types of BPs (Records) for which they have permissions

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier'. Below this, there are tabs for 'Home', 'Company Works...', 'School Facilities', and 'Talawanda- Kra...'. A search bar labeled 'Navigate To...' is visible. The main interface is divided into two sections: 'User' and 'Admin'. The 'User' section contains a list of business process types, including 'Talawanda- Kramer Elemen...', 'Alerts', 'uMail', 'Collaboration', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', and 'Logs'. The 'Admin' section is currently expanded, showing a list of records. A table titled 'Drafts - Current View: All' is displayed, showing 7 items. The table has columns for 'Type', 'Number', and 'Title'. The records listed are:

Type	Number	Title
Action Items K12		Test Action It
Miscellaneous Invoice	MI-0001	Test Invoice
Miscellaneous Invoice		Test Invoice
Contract Schedule of V		Test SOV
Contract K12	CON-001	Katie's Contra
Subcontractor/Supplie		
Applications for Payme		PR Test 1-25-

How do Records Work?



Create a Record

- ▶ In Logs, navigate to the record type you wish to create
- ▶ Click New

The screenshot displays the Oracle Primavera Unifier web application interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and user information 'Katie Tuttle' with a 'Sign Out' link. Below this is a breadcrumb trail: 'Home > Company Works... > School Facilities > Talawanda- Kra... > Brown - New K-...'. The main content area is divided into a left sidebar and a main workspace. The sidebar, under the 'User' tab, lists various modules: Talawanda- Kramer Elemen..., Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, and Logs. The 'Logs' module is expanded, showing a list of record types: Action Items K12, Advertisements K12, Applications for Payment..., Budgets K12, Certified Payrolls K12, and Closeout - Contractor K12. The 'Action Items K12' record type is selected. The main workspace shows a menu with 'File', 'Edit', 'New', and 'Help'. The 'New' button is circled in red, and a red arrow points to it from the top right. Below the menu is a table header for 'Action Items K12' with columns: Record No., Title, Assignee, Due Date, Priority, and Creation Date. The table is currently empty, showing '0 Item(s)' and 'Page 1 of 1'.

Create a Record

- ▶ Fill out all required information in the General Tab
 - ▶ Required information is marked with a red *

Create New Action Items K12 - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?project_id=1084&module_name=uaik&csvimport=false

File Edit View Actions Help Workflow Actions -Select-

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

Action Items Action Items K12

General

Project Number: SFC-080001 Record Number:

Project Name: OAKS CI District Training Project 1 Creator: Katie Tuttle

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

Facility Name: Status:

Title: Test Action Item Priority: Medium

Assignee: Katie Tuttle Due Date:

Meeting Minute: Select...

Action

Action Requested: *

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

FilePath: Action Items FilePath Suffix: Test Action Item

Publish Path: Action Items/ Test Action Item

Action Details

Action Item Descript...

Linked Records (0) Linked Mail (0)

Attach Documents to your Record

- ▶ To attach documents to your record, click Add Attachment and choose **My Computer**

The screenshot shows a web browser window titled "Create New Action Items K12 - Project No. SFC-080001 - Google Chrome". The URL is https://ohio-train-unifier.oracleindustry.com/bp/process/new?project_id=10848&module_name=uaik&csvimport=false. The browser's menu bar includes File, Edit, View, Actions, and Help. A red circle highlights the "Add Attachment" menu, which is open, showing options: "My Computer" (highlighted in blue), "Unifier Folder", and "Close Window". A red arrow points to the "Add Attachment" menu.

The main form is titled "Action Items" and has a "General" section with the following fields:

Project Number:	SFC-080001	Record Number:	
Project Name:	OAKS CI District Training Project 1	Creator:	Katie Tuttle
Organization Name:	OAKS CI District Training Project - 1	Creation Date:	
Facility Name:		Status:	
Title:	Test Action Item *	Priority:	Medium
Assignee:	Katie Tuttle	Due Date:	
Meeting Minute:			

The "Action" section has a text area for "Action Requested:".

The "Document Publishing" section contains the following information:

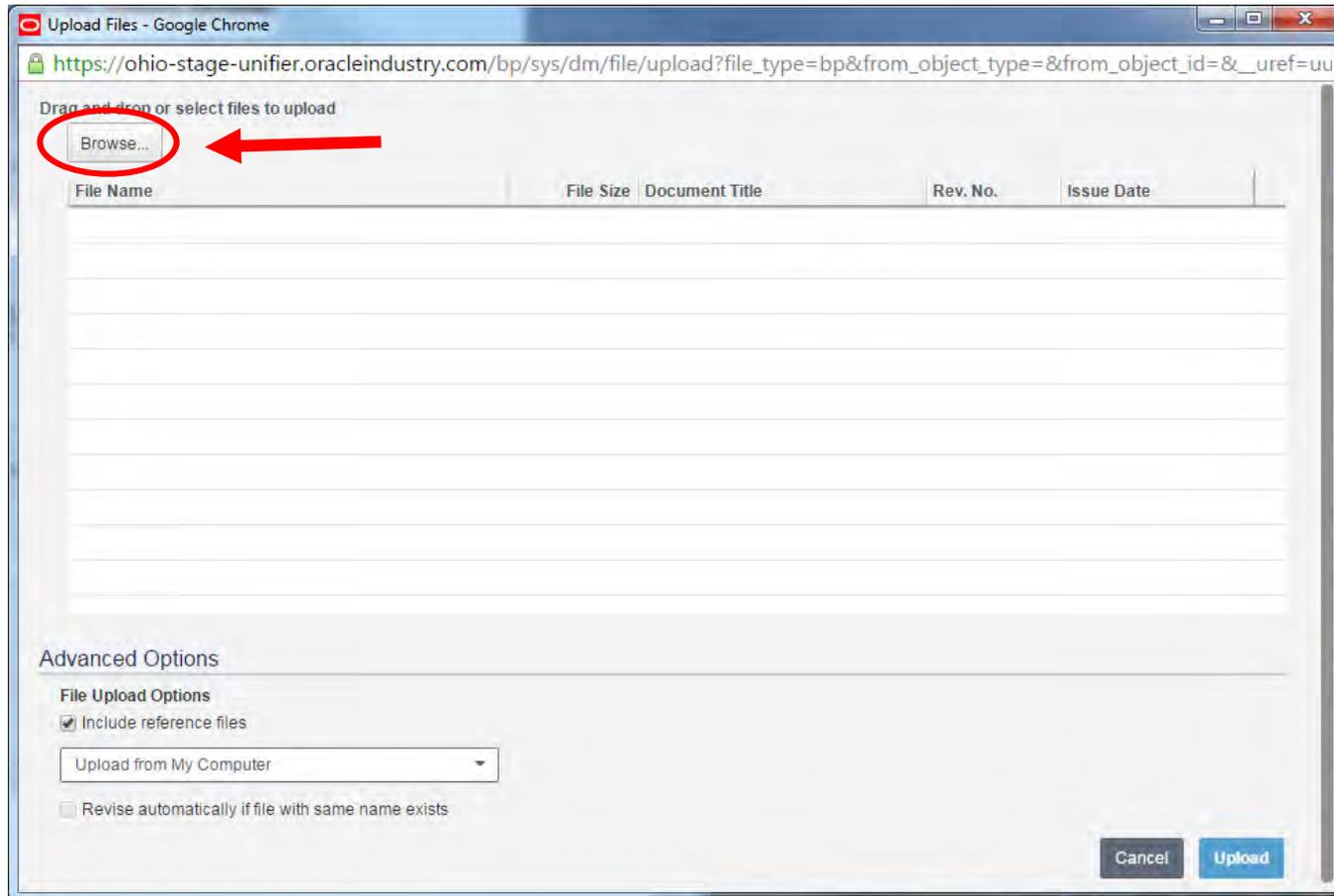
Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

FilePath:	Action Items	FilePath Suffix:	Test Action Item
Publish Path:	Action Items/ Test Action Item		

At the bottom, there are tabs for "Action Details" and "Action Item Descript...". A "Linked Mail (0)" link is visible in the bottom right corner.

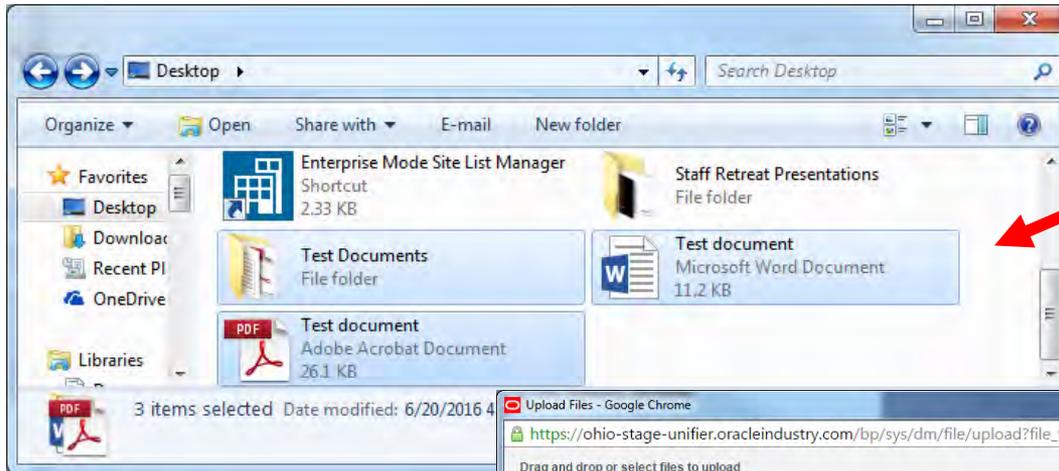
File Upload Window

- ▶ A new window will appear for you to add files
- ▶ Click Browse to choose files for upload



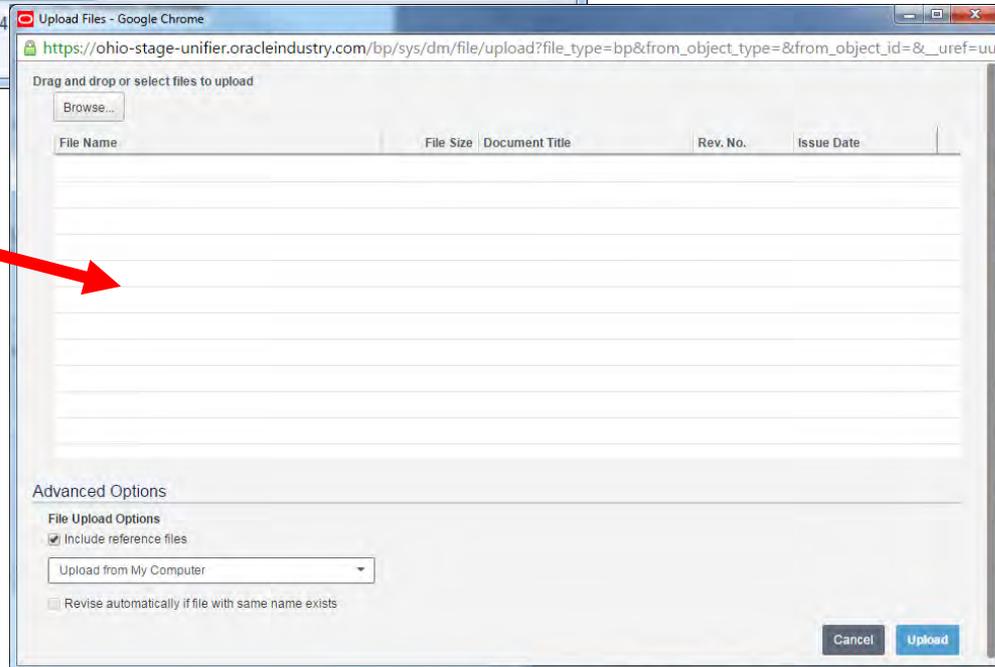
Drag and Drop files

- ▶ Find the folders and/or files your computer you want to upload
- ▶ Drag and Drop the documents into the Upload Files window



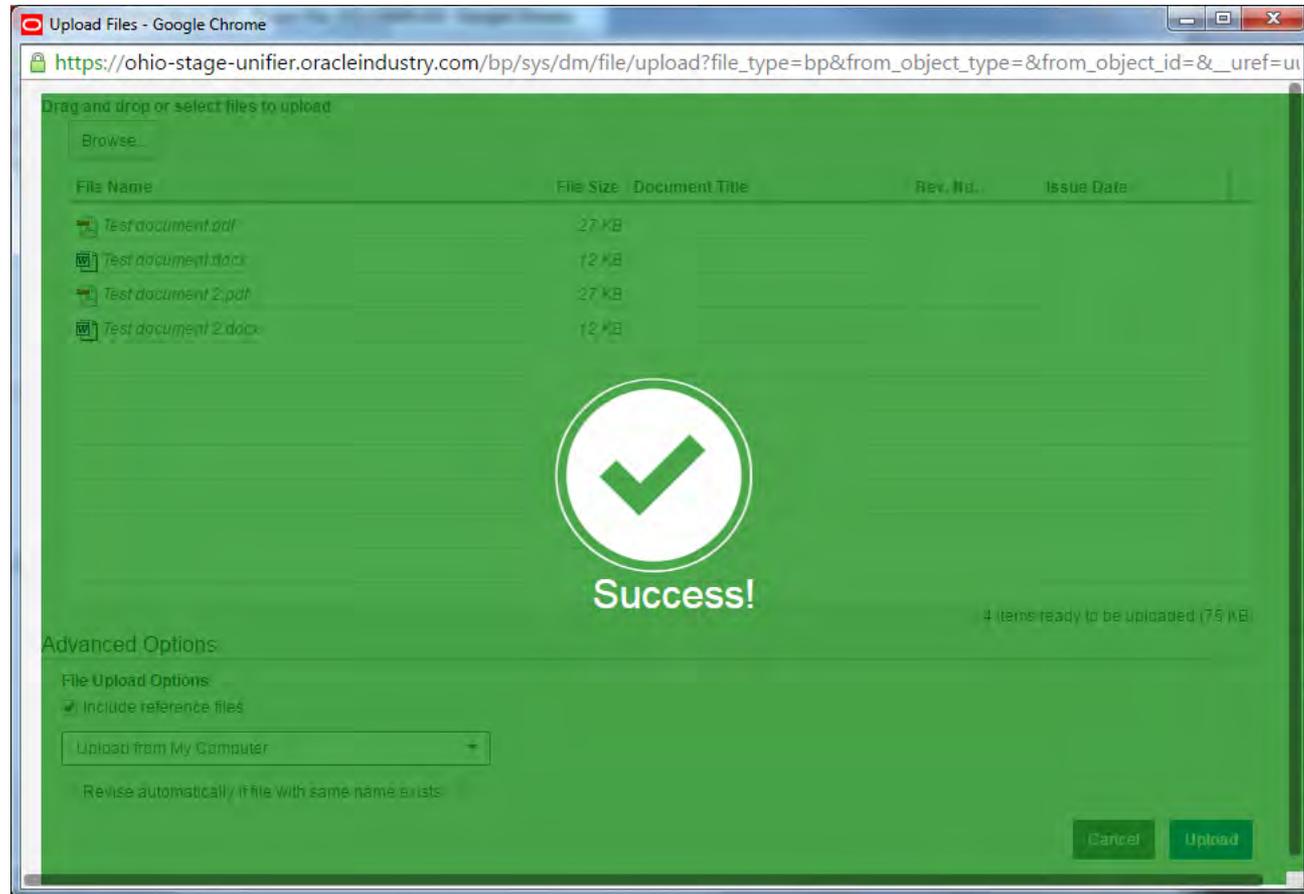
Choose your folder of Documents or Select Multiple Documents

Drag and Drop the documents into the Upload Files window



Adding Documents

- ▶ If all folders and files have been added, you will see a green “Success!” screen



Upload Documents

- ▶ You should see all of your documents in the Upload Files window
- ▶ Click Upload button

Upload Files - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/sys/dm/file/upload?file_type=bp&from_object_type=&from_object_id=&_uref=ul

Drag and drop or select files to upload

Browse...

File Name	File Size	Document Title	Rev. No.	Issue Date
Test document.pdf	27 KB			
Test document.docx	12 KB			
Test document 2.pdf	27 KB			
Test document 2.docx	12 KB			

4 items ready to be uploaded (75 KB)

Advanced Options

File Upload Options

Include reference files

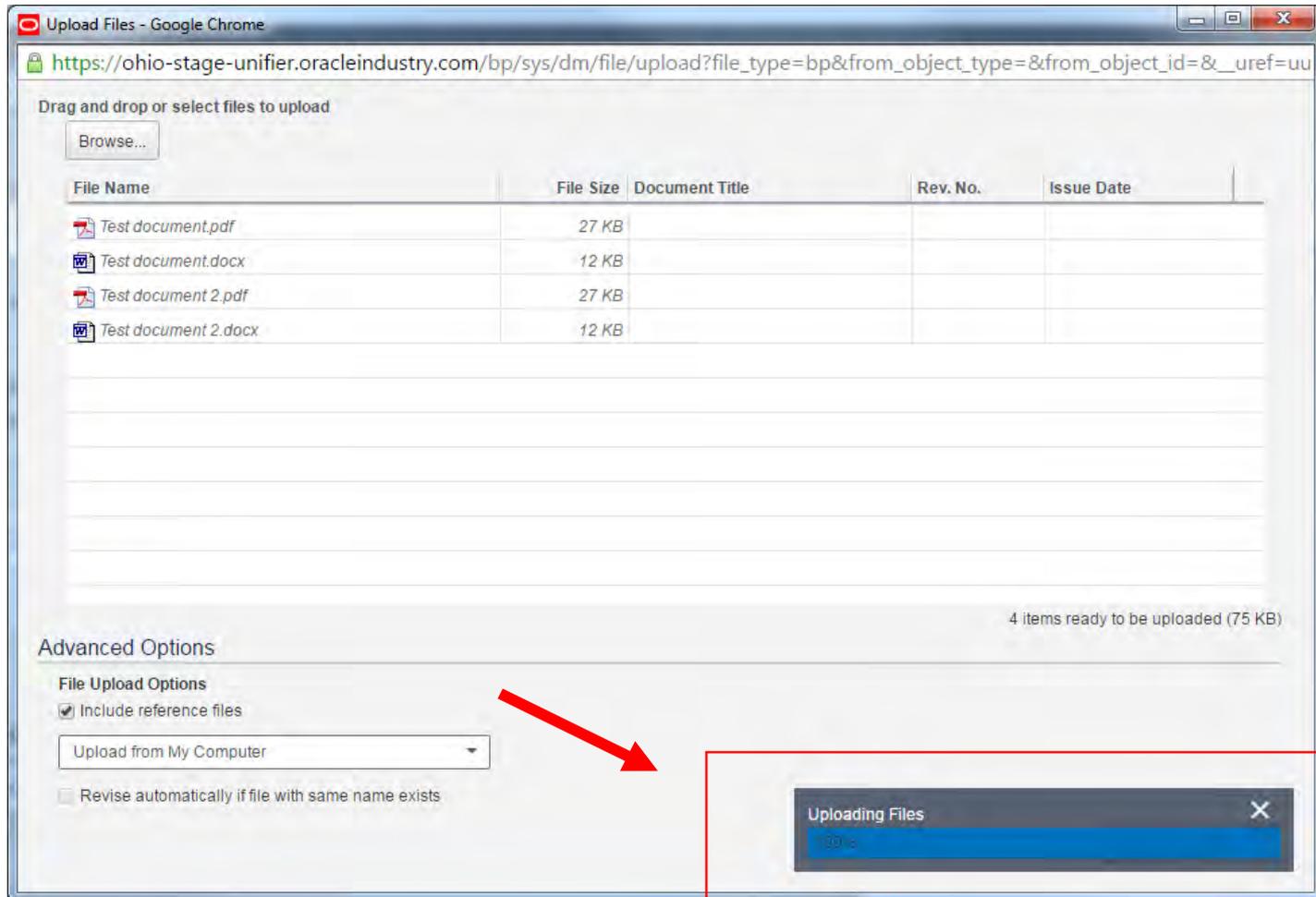
Upload from My Computer

Revise automatically if file with same name exists

Cancel Upload

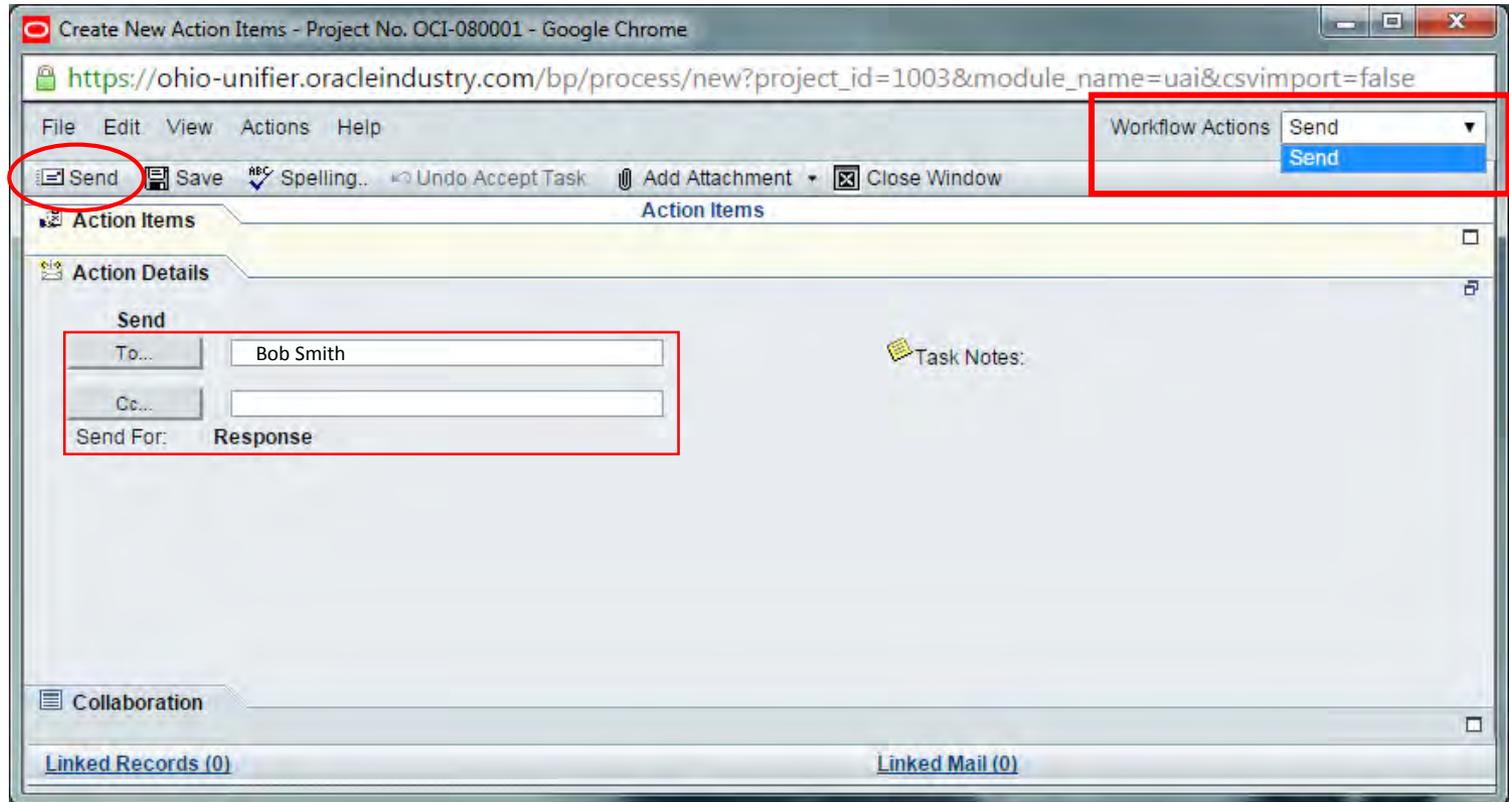
Upload Documents

- ▶ When all documents have finished uploading, you will see a 100% bar at the bottom of the screen



Send the Record

- ▶ Choose a Workflow Action
- ▶ Click Send



This record is now going to be Bob Smith's TASK.

Working with Tasks



Receive an Email

The screenshot shows an email client window titled "Change Order CO-0013 is sent to you for PM Review. - Message (HTML)". The interface includes a menu bar with "File", "Message", and "McAfee E-mail Scan". Below the menu is a toolbar with various actions like "Delete", "Reply", "Forward", "Move", "Assign Policy", "Mark Unread", "Categorize", "Follow Up", "Translate", and "Zoom".

The email header shows it was received on "Sun 6/19/2016 3:51 PM" from "Unifier - Katie Tuttle, SOO <unifier_notifications@oracle.com>". The subject is "Change Order CO-0013 is sent to you for PM Review." The recipient is listed as "Tuttle, Katie".

The main body of the email contains the following text:

This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: Agency General Projects Test

Change Order CO-0013 is sent to you for PM Review.

The text "Change Order CO-0013 is sent to you for PM Review." is highlighted with a red box and a red arrow points to it from the right.

Below the main text, there are two sections of metadata:

From : Katie Tuttle
Sent For : PM Review

Source Name : Agency General Projects Test
Record No : Change Order CO-0013
Title : Test Proposal Request

At the bottom of the email body, there is a "Unifier Login" button.

At the very bottom of the email, there is a link for Oracle technical assistance: <http://www.oracle.com/us/support>

Reviewing a Task

The screenshot shows the Oracle Primavera Unifier web interface. The user is logged in as Katie Tuttle. The interface includes a top navigation bar, a breadcrumb trail, and a left sidebar with various menu items. The 'Tasks' menu item is circled in red. The main content area displays a table of tasks with columns for Type, Number, Title, Re Du, From, Sent for, Task Due, and Received. A red arrow points from a text box to the first task in the list.

Choose the task you need to review and double click to open

Type	Number	Title	Re Du	From	Sent for	Task Due	Received
Miscellaneous Commit K12	MC-0003	Misc. C		Katie Tuttle,so	Funding Certification		05/06/2016
Miscellaneous Invoice K12	MI-0001	Test Inv		Katie Tuttle,soc	Payment Processing		05/06/2016
Miscellaneous Commit K12	MC-0002	Misc. C		Katie Tuttle,soc	Funding Certification		05/04/2016
Design Reviews K12	DR-001			Katie Tuttle,soc	Detailed Review		04/15/2016
Subcontractor/Supplier Declarations	SMSD-003	OAKS C		Katie Tuttle,soc	Subcontract Attachment		04/12/2016
Contract K12	CON-001	Katie's		Katie Tuttle,soc	School District Contract E		04/07/2016
Contract Modification K12	CM-0003	Test dis		Katie Tuttle,soc	Contractor Review		04/01/2016

Reviewing a Task

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

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=158732&parent_id=0&viewOnly=0&project...

File Edit View Actions Help

Accept Task Decline Task Line Item History SOV Close Window

General

Click Accept Task

General

Project Name: OAKS CI District Training Project 1 Record Number: PR-0005

Project Number: SFC-080001 Creator: Kati

Organization Name: OAKS CI District Training Project - 1 Creation Date: 02/16/2016 07:04 AM (UTC-5)

Facility Name: Status: Pending

Task Details

From: Katie Tuttle; Task Due Date: To: District Rep: Barbara Taylor; More...; Task Status: Not Started; Cc: Sent For: District Approval

Review any Task Notes

Task Notes (0)

Pay Request Details

Current View: All Show Currency in: Transaction Currency

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	

Find Total Amount: \$103,500.00

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

Responding to a Task

- ▶ Review the upper and lower forms of the record
- ▶ Enter any additional information as necessary

Applications for Payment K12

General

Project Name: OAKS CI District Training Project 1
Project Number: SFC-080001
Organization Name: OAKS CI District Training Project - 1

Record Number: PR-0005
Creator: Katie Tuttle
Creation Date: 02/16/2016 07:04 AM (UTC-8)

Action Details

Approve (Click here to view latest content)

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

Task Notes:

Note: Click to add a general comment that will be permanent to the record

Pay Request Details

No.	WBS Code	Commit Short Description	Scheduled Value	Previous 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	

Total Amount: \$103,500.00

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

Responding to a Task

Select Appropriate Workflow Action

Click Send

Note: When Workflow action is selected the Action Details (To: box) updates with the next person in the workflow

Project Name: OAKS CI District Training Project 1
Record Number: PR-0005
Project Number: SFC-080001
Creator: Katie Tuttle
Organization Name: OAKS CI District Training Project - 1
Creation Date: 02/16/2016 07:04 AM (UTC-8)

Action Details

Approve ([Click here to view latest content](#))

To... Barbara Taylor,Katie Tuttle,Moenique Morris,R
Cc...
Send For: Payment Processing

Pay Request Details

Current View: All Show Currency in: Transaction Currency

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	

Total Amount: \$103,500.00

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

What if I want to know the status of my Record?



Finding the Record Status

- ▶ Navigate to Logs, choose Record type, view Status column
- ▶ For more detail, double-click the record to open

The screenshot displays the Oracle Primavera Unifier interface. The left sidebar shows a navigation menu with 'Logs' circled in red. The main window shows a table titled 'Applications for Payment K12 - Current View: All'. The table has columns for Title, Contract SOV, Contractor Name, Percent Complete, Total Payment Requested, Sum of Payments, Earned To Date, Final Payment?, Status, and Record Number. The 'Status' column is highlighted with a red box, and a red arrow points to it.

Title	Contract SOV	Contractor Name	Percent Complete	Total Payment Requested	Sum of Payments	Earned To Date	Final Payment?	Status	Record Number
Robertson Pay Request 02	Roberston SOV	Robertson Construction	0.02331664	\$32,275.70	\$103,490.00	\$103,490.00	No	Terminated	PR-0002
Robertson Pay Request 01	Roberston SOV	Robertson Construction	0	\$71,214.30	\$71,214.30	\$71,214.30	No	Approved	PR-0001

Finding the Record Status

- ▶ Review Task Details
- ▶ Click Workflow Progress link to view status of the record

The screenshot displays the Oracle Applications for Payment K12 interface. The browser window title is "Applications for Payment K12 - Test PR 5 - Project No. OCI-150041.03 - Google Chrome". The URL is https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=153976&parent_id=0&viewOnly=0&project. The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with buttons for "Accept Task", "Decline Task", "Line Item History", "SOV", and "Close Window".

The main content area is divided into several sections:

- General**: Contains fields for Project Name (Brown - New K-12 Second Chance), Project Number (OCI-150041.03), Organization Name (Brown LSD), Facility Name (Brown - New K-12), Record Number (PR-0008), Creator (Katie Tuttle), Creation Date (06/24/2016 05:44 AM (UTC-8)), and Status (Approved).
- Task Details**: Contains fields for From (Katie Tuttle), To (District Treasurer: Barbara Taylor), Task Due Date, Task Status (Not Started), Cc, and Sent For (Payment Processing). This section is highlighted with a red box.
- Task Notes (0)**: A link to view task notes.
- Workflow Progress**: A link to view the workflow progress, highlighted with a red circle and a red arrow pointing to it.

The **Pay Request Details** section shows a table with 1 item(s) and a total amount of \$8,295.25. The table columns are: No., WBS Code, Commit Short Description, Scheduled Value, Previously Earned, Earned This Period, % Labor Complete, % Materials Complete, % Services Complete, and Re. The table contains one row with the following data:

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	Re
001	CE-CE-GC	General Conditions Costs	\$33,181.00	\$24,885.75	\$8,295.25	100	0	0	

The total amount is \$8,295.25. The interface also includes a "Find" search box and links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Finding the Record Status

The screenshot displays a web browser window titled "Workflow Progress - Google Chrome". The URL is https://ohio-stage-unifier.oracleindustry.com/bp/studio/workflow/show/progress?processId=7796&selected_node_id. The page shows the workflow progress for a record titled "Test PR 5" with Record No.: PR-0008 and BP Setup used: Contractor Pay Re... The table below lists the steps of the workflow, including their status and completion dates.

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Katie Tuttle	State of Ohio	Completed	Submit	06/24/2016 05:44 AM (UTC-8)
AE Review	Katie Tuttle	State of Ohio	Completed	Accept	06/24/2016 05:45 AM (UTC-8)
Update					
OA Review	Katie Tuttle	State of Ohio	Completed	Recommend Approv	06/24/2016 05:45 AM (UTC-8)
Review and Validation	Katie Tuttle	State of Ohio	Completed	Validated	06/24/2016 05:45 AM (UTC-8)
PM Review	Katie Tuttle	State of Ohio	Completed	Accept	06/24/2016 05:46 AM (UTC-8)
PM Supervisor Review					
District Approval	Katie Tuttle	State of Ohio	Completed	Approve	06/24/2016 05:56 AM (UTC-8)
Payment Processing	Supriya Gali	State of Ohio	Not Started		
Payment Processing	Lindsay Deering	State of Ohio	Not Started		
Payment Processing	Barbara Taylor	State of Ohio	Not Started		
Payment Processing	Shiva Gannerla	State of Ohio	Not Started		
Payment Processing	Purna Irukulapati	State of Ohio	Not Started		

Below the table is a diagram view of the workflow. The diagram shows a flow from "District Approval" to "Payment Processing" (labeled "Approve"), and then to "Vouchered" (labeled "Vouchered"). A "Return for Clarification" path is also shown from "District Approval".

Two red arrows point to the table and the diagram view, with callout boxes containing the text: "View the workflow of the Record from Creation to End" and "Diagram view of the workflow".

Additional Resources

- ▶ When you receive your first Contract or Application for Payment task in OAKS CI, you will be responsible for creating a Purchase Order or a Voucher in your own financial system of record and Recording that information into OAKS CI.
- ▶ For Additional Job Aids that can provide additional assistance on creating and completing these records, visit the K-12 District Staff Training section of the OFCC Website.

Questions?

OAKS CI Support Desk Contact Info:

oaksci@ofcc.ohio.gov

614.644.2211