



K-12 District Staff

Welcome to OAKS CI, Legacy

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 main navigation menu includes: About, Documents, Services / Programs, News / Events, Opportunities, **OAKS CI** (highlighted with a red circle and a red arrow), Resources, and Gallery. A breadcrumb trail indicates "You are here : OAKS CI". The main content area is titled "OAKS Capital Improvements (OAKS CI)" and describes it as a construction management system for State of Ohio-sponsored capital improvement projects. Below this, there are three columns of options:

Agency/Higher Ed	K-12 Cloud System	K-12 Legacy System
Agency/Higher Ed User Login	K-12 User Login (Cloud System)	K-12 User Login (Old System)
Agency/Higher Ed Training	K-12 Training (Cloud System)	K-12 Training (Old System)

The "Agency/Higher Ed Training" button is highlighted with a red box and a red arrow. Below the main content is a "Contacts & Forms" section with three sub-sections:

- OAKS CI Support**: OAKSCI@ofcc.ohio.gov, 614.644.2211
- OAKS CI Forms**:
 - User Application for Access
 - Vendor Information Form
 - Project Information Form
- 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 provided.

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

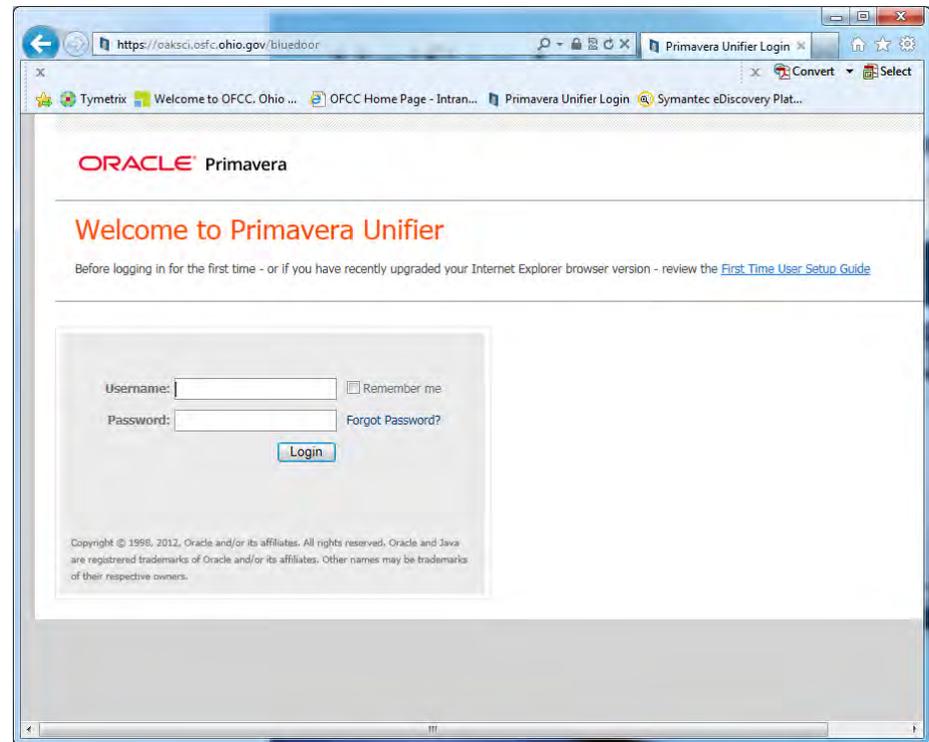
- ▶ **District Superintendent** role will see all records in OAKS CI, however, will touch the following:
 - ▶ Contracts (via DocuSign, not in OAKS CI)
 - ▶ Provide District Acceptance for Change Orders (via DocuSign, not in OAKS CI)
 - ▶ LFI MOU District Signature
- ▶ **District Representative** role 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

Navigate to OAKS CI

- Open Internet Explorer
- Navigate to: <https://oaksci.osfc.ohio.gov>
- Enter your assigned Username and Password
- Click “Login”

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



Cross Project Home Page

The screenshot shows the Primavera Unifier web interface. The browser address bar displays the URL <https://oaksci.training.osfc.ohio.gov>. The user is identified as Shauna Hooks, with a last login time of 09/25/2013 02:02 PM. The navigation menu includes Home, Company Workspace, Projects, and School Facilities. The 'School Facilities' tab is selected, and a red arrow points to it with the label 'Cross project tabs'. The main content area is divided into several sections: 'Announcements' (with a red arrow pointing to it labeled 'Announcements'), 'Items Requiring Your Attention' (showing 42 total tasks, 34 new, and 5 late), 'Messages' (0 new), 'Draft Records' (10 new), and 'uMails' (3 new). Below these is a section titled 'Tasks or New uMails:' containing a table of project tasks.

Number	Name	Tasks	uMails	Company Name
OCI-130101	School Facilities Training 1	28 Total, 24 New, 2 Late	3 New	Ohio School Facilities
OCI-130007	UAT 8 Rel 1 - Eaton	4 Total, 1 New, 3 Late		Ohio School Facilities
OCI-130006	UAT 7 Rel 1 - Deaf and Blind	1 Total, 1 New, 0 Late		Ohio School Facilities
OCI-130005	UAT 6 Rel 1 - Louisville	1 Total, 1 New, 0 Late		Ohio School Facilities
OCI-130003	UAT 2 Rel 1 - Dayton STEM	4 Total, 3 New, 0 Late		Ohio School Facilities
OCI-130002	UAT 5 Rel 1 - Toronto	4 Total, 4 New, 0 Late		Ohio School Facilities

A red arrow points to the table with the label 'Projects with Active Tasks'.

District and Building Level Access

The screenshot shows the Primavera Unifier web interface. The user is logged in as Shauna Hooks. The navigation tabs include Home, Company Workspace, Projects, and School Facilities. The 'View' menu is highlighted with a red arrow. A red box contains the text 'District and Building Level Project Access'. The main content area displays a table of tasks and uMails for various projects.

Number	Name	Tasks	uMails	Company Name
OCI-130101	School Facilities Training 1	28 Total, 24 New, 2 Late	3 New	Ohio School Facilities
OCI-130007	UAT 8 Rel 1 - Eaton	4 Total, 1 New, 3 Late		Ohio School Facilities
OCI-130006	UAT 7 Rel 1 - Deaf and Blind	1 Total, 1 New, 0 Late		Ohio School Facilities
OCI-130005	UAT 6 Rel 1 - Louisville	1 Total, 1 New, 0 Late		Ohio School Facilities
OCI-130003	UAT 2 Rel 1 - Dayton STEM	4 Total, 3 New, 0 Late		Ohio School Facilities
OCI-130002	UAT 5 Rel 1 - Toronto	4 Total, 4 New, 0 Late		Ohio School Facilities

District Level Access

Unifier@https://oaksci.training.osfc.ohio.gov - Windows Internet Explorer
ORACLE Primavera Unifier Shauna Hooks (Last login: 10/08/2013 09:21 AM) Community Bookmarks Preferences Support Logout

Home Company Workspace Projects School Facilities

User Mode School Facilities - Home School Facilities - Home View Dashboard My Dashboard

View: District Project

District Project - Current View: All

5 Item(s) Page 1 of 1 Display 100 items per page

District Project Identifier	District	OAKS Code	Setup Date	Status
Brookfield-LSD-TRU-CFAP-2007	Brookfield Local SD	SFC-	09/25/2013	Active
Lancaster-CSD-FAI-ENP-2012	Lancaster City SD	SFC-130322	09/16/2013	Active
Napoleon-CSD-	Napoleon Area City SD	SFC-120306	09/16/2013	Active
National Trail-LSD-1990 Lookback-1-20	National Trail Local SD	SFC-130316	09/16/2013	Active
South-Western-CSD-FRA-CFAP-2012	South-Western City SD	SFC-130315	09/16/2013	Active

District view will allow you to view all School Districts you may access

Double Clicking the District will take you to the district homepage

Building Level Access

The screenshot shows the Primavera Unifier web interface. The browser address bar displays 'Unifier@https://oaksci.training.osfc.ohio.gov'. The user is identified as 'Shauna HOOKS (Last login: 10/08/2013 09:21 AM)'. The navigation menu includes 'Home', 'Company Workspace', 'Projects', and 'School Facilities'. The main content area is titled 'School Facilities - Home' and features a 'View Dashboard' button and a 'My Dashboard' dropdown. A 'View: Building Project' dropdown is visible above a table of building projects. The table contains the following data:

Number	Name	Setup Date	Status
SFC-130322.02	Central Elementary	09/23/2013	Active
SFC-130315.17	Prairie Norton Elementary	09/20/2013	Active
SFC-120306.6	Napoleon Area City School District	09/19/2013	Active
SFC-???????.01	Brookfield K-12	09/25/2013	Active

Two red callout boxes provide instructions:

- The first callout box, located in the center of the page, contains the text: "Building Project view will allow you to view all School Districts you may access". A red arrow points from this box to the 'View: Building Project' dropdown.
- The second callout box, located at the bottom right, contains the text: "Double Clicking the Building project will take you to the Building project's homepage". A red arrow points from this box to the first row of the table (SFC-130322.02).

Building Project Home Page

Unifier@https://oaksci.training.osfc.ohio.gov - Windows Internet Explorer

ORACLE Primavera Unifier Shauna Hooks (Last login: 10/08/2013 09:21 AM) Community Bookmarks Preferences Support Logout

Home Company Workspace Projects School Facilities

School Facilities > Lancaster-CSD-FAI-ENP-2012 > Central Elementary

User Mode

File Edit View Help

Central Elementary - Home View Dashboard My Dashboard

Summary

Image

Details

Number: SFC-130322.02
Name: Central Elementary
Description: New Elementary School
Administrat Steve Mayo
or:
Currency: United States Dollar (USD)
Status: Active
Email 1015-
Address: oaksci@socccemsntp.em.ohio.gov

Most work is completed in 3 areas:

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

Collaboration– All About You!

The screenshot shows a web browser window with the address bar displaying <https://oaksci.training.ohio.gov/> and the user Unifier@https://oaksci.training.ohio.gov. The page title is "OAKS CI Training 2 - Home" and the date is "09/25/2009 - Shauna Hooks". The navigation menu includes "Home", "Company Workspace", and "Projects". The left sidebar shows a tree view of the application structure, with "Collaboration" highlighted and a red arrow pointing to it. The main content area displays project details for "OAKS CI Training 2 - Home", including a photo of a building, project number "OCI-080002", project phase, location "4200 Surface Road Columbus, Ohio, 43228, US", and description "Project for Classroom Training Activity".

Collaboration houses:

- Tasks
- Messages
- Drafts

Tasks (Your Records)

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a tree view of folders: Projects (Standard), OAKS CI Training 2 - Home, Summary, Alerts, uMail, Collaboration, Tasks, Messages, Drafts, Information, Cost Manager, Data Manager, Document Manager, Schedule Manager (Basic), Logs, and Reports. The 'Tasks' folder is highlighted, and a red arrow points from a text box below to it. The main content area displays a table of tasks with columns: Type, Number, Title, Record Due, From, Sent for, Task Due, and Received. The table contains 10 items.

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Action Item	AI-00066	indigo	09/30/2009	Shauna Hook	Response		09/23/2009
Action Items	AI-00065	Visit	09/30/2009	Shauna Hook	Response		09/23/2009
Request for	RFI-00007	HVAC 1		Consultant St	Response Acc	09/07/2009*	08/31/2009
Action Item	AI-00054	dsds	09/07/2009*	Consultant St	Review		08/31/2009
Action Item	AI-00015	New Action	07/20/2009*	Shauna Hook	Response		07/13/2009
Change Orc	CO-0004	Bruce's and Rita's		Oaks Student	CM Review		07/09/2009
Action Items	AI-00012	Project One	06/19/2009*	Oaks Student	Response		06/12/2009
Contract Sc	C SOV-0004	General Prime - ?		Fred Holcom	Associate Apt		04/16/2009
Subcontract	SSD-0009	T P Mechanical C		Oaks Student	Associate Dec	04/19/2009*	04/16/2009
Subcontract	SSD-0008	PM		Oaks Student	Associate Dec	04/19/2009*	04/16/2009

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

Messages

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a tree view of folders: Projects (Standard), OAKS CI Training 2 - Home, Summary, Alerts, uMail, Collaboration, Tasks, Messages, Drafts, Information, Cost Manager, Data Manager, Document Manager, Schedule Manager (Basic), Logs, and Reports. The 'Messages' folder is highlighted, and a red arrow points from a text box to it. The main content area shows a list of 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 Widges	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	C SOV-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	C SOV-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 a software interface with a navigation pane on the left and a main content area on the right. The navigation pane lists various folders, with 'Drafts' highlighted. A red arrow points from a text box to the 'Drafts' folder. The main content area displays a list of 11 draft items.

Drafts - Current View: All
11 Item(s)

Type	Number	Title	Last Saved
Meeting Minutes			09/21/2009
Action Items			09/21/2009
Action Items		shauna	09/21/2009
Design Reviews			08/28/2009
Contract Schedule of		Plumbing - Mayo	08/20/2009
Subcontractor/Suppli		Oaks Plumbing	08/19/2009
Contractor Pay Requi			06/25/2009
Action Items			05/12/2009
Fund Transfers		shooks	01/15/2009
Action Items		JKH	11/06/2008
Action Items		blah	11/06/2008

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

A screenshot of the OAKS CI application interface. The "Save" button in the top toolbar is circled in red. The main content area shows a form for "Applications for Payment K12" with fields for Project Name, Project Number, Record Number, and Creator. Below this is the "Action Details" section with "Create New Applications for Payment K12" and "Task Notes" fields. At the bottom, there is a "Pay Request Details" table with columns for No., WBS Code, Commit Short Description, Scheduled Value, Previously Earned, Earned This Period, % Labor Complete, and % Materials Complete. The "General Comments" link at the bottom is also circled in red.

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.

The screenshot shows a web application interface with a left sidebar and a main content area. The sidebar contains a tree view of navigation items, with 'Logs' circled in red. The main content area displays a table of Design Reviews (Records) with columns for Record No, Stage, Completion Status, Creation Date, Est. Construction Cost (\$), and Status. A red arrow points from a text box to the 'Logs' menu item.

Record No	Stage	Completion Status	Creation Date	Est. Construction Cost (\$)	Status
DR-0008	Design Development	Final	12/04/2009	0.00	Pending
DR-0007	Schematic Design	50% (CD Only)	10/19/2009	0.00	Pending
DR-0006	Program Verification	85 - 95% (CD Or	10/08/2009	0.00	Pending
DR-0005	Design Development	50% (CD Only)	10/08/2009	0.00	Accepted
DR-0004	Schematic Design	50% (CD Only)	10/07/2009	400,000.00	Pending
DR-0003	Program Verification	50% (CD Only)	10/07/2009	0.00	Pending
DR-0002	Program Verification	Final	12/05/2008	13,333.00	Pending
DR-0001	Program Verification	Final	12/05/2008	12,000.00	Accepted

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

How do Records Work?



Create a Record

- ▶ In Logs, navigate to the record type you wish to create
 - ▶ **For this example, we are creating a Miscellaneous Commit**
- ▶ Click New

Oracle Primavera Unifier - Shauna Hooks (Last login: 07/16/2014 01:52 PM)

Community Bookmarks Preferences Support Logout

Home Company Workspace School Facilities

School Facilities > Lancaster-CSD-FAI-ENP-2012

User Mode

File Edit **New** Help

New Copy Open Find Filtered By Import

Lancaster-CSD-FAI-ENP-2012

Alerts uMail Mailbox Collaboration Information Cost Manager Data Manager Document Manager Logs Applications for Payment Budgets Closeout - Professional Services Contract Contract Modification Contract Schedule of Values Financial Risks Fund Allocation Fund Release Fund Transfers Locally Funded Initiative Meeting Minutes **Miscellaneous Commit** Miscellaneous Invoice Professional Services Acquisition

Miscellaneous Commit - Current View: All

12 Item(s) Page 1 of 1 Display 100 items per page

Title	Vendor	Status	Creation Date	Record Number
Landscaping		Approved	07/25/2014	MC-0012
signage		Approved	07/17/2014	MC-0011
Sound System		Approved	07/17/2014	MC-0010
Plans 3		Approved	07/17/2014	MC-0009
Plans 2		Approved	07/17/2014	MC-0008
Plans		Approved	07/17/2014	MC-0007
New path		Approved	07/17/2014	MC-0006
Paul's Pools - Pool Safety Eq		Approved	07/17/2014	MC-0005
test step		Approved	07/17/2014	MC-0004
Location	Lend Lease Construction	Approved	07/17/2014	MC-0003
Test MC Doc 1	Schorr Architects, Inc.	Approved	07/16/2014	MC-0002
Add Attachment From Deskto	Schorr Architects, Inc.	Accepted	07/16/2014	MC-0001

Create a Record

- ▶ Click the General tab to expand the upper form

Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion Cash Flow Close Window

General Miscellaneous Commit

General

Project Number: SFC-130322 Record Number:

Project Name: Lancaster-CSD-FAI-ENP-2012 Creator: Shauna Hooks

Organization Name: Lancaster City School District Creation Date:

Facility Name: North Elementary School Status:

Title: 25 Chuckies Chairs *

Vendor: Select... EDGE Certified Prime?: No

Vendor Name: Chuckies Chairs Inc.

Prevailing Wage: N/A *

Description

Description: classroom chairs

Additional Information

Amount (\$):	2,500.00 *
Line Item Total (\$):	0.00
Difference (\$):	2,500.00
Total FI Share (\$):	0.00

Action Details

Line Item List

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

Add Information

- ▶ Complete information in the upper form
 - ▶ Required information is marked with a red *
- ▶ Enter Amount in Additional Information

Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion Cash Flow Close Window

General Miscellaneous Commit

General

Project Number: SFC-130322 Record Number:

Project Name: Lancaster-CSD-FAI-ENP-2012 Creator: [Shauna Hooks](#)

Organization Name: Lancaster City School District Creation Date:

Facility Name: North Elementary School Status:

Title: 25 Chuckies Chairs *

Vendor: Select... EDGE Certified Prime?: No

Vendor Name: Chuckies Chairs Inc.

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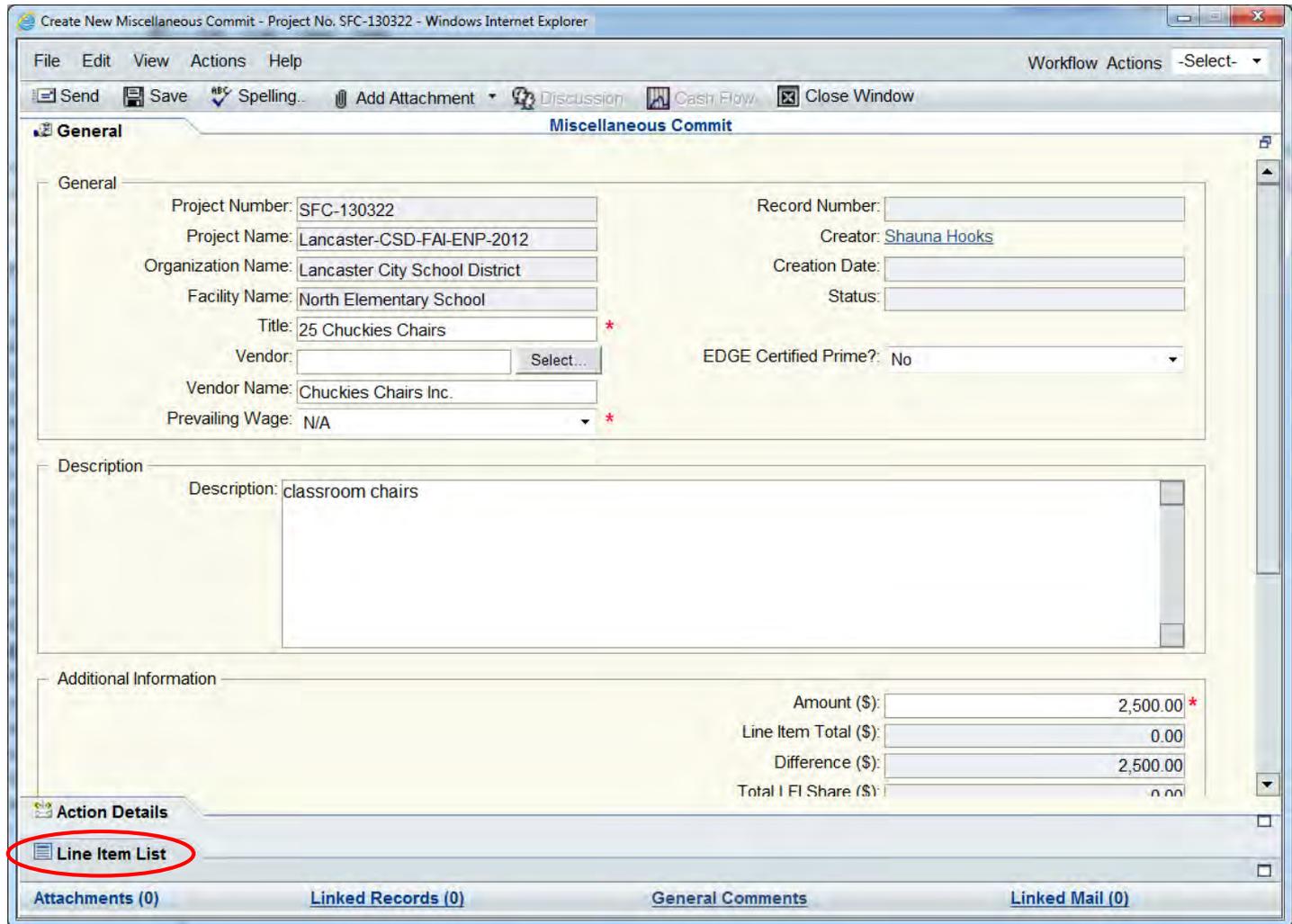
Action Details

Line Item List

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

Add Line Items

- ▶ Click the “Line Item List” tab to add line items



Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion Cash Flow Close Window

General Miscellaneous Commit

General

Project Number: SFC-130322 Record Number:

Project Name: Lancaster-CSD-FAI-ENP-2012 Creator: Shauna Hooks

Organization Name: Lancaster City School District Creation Date:

Facility Name: North Elementary School Status:

Title: 25 Chuckies Chairs *

Vendor: Select... EDGE Certified Prime?: No

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Description: classroom chairs

Additional Information

Amount (\$): 2,500.00 *

Line Item Total (\$): 0.00

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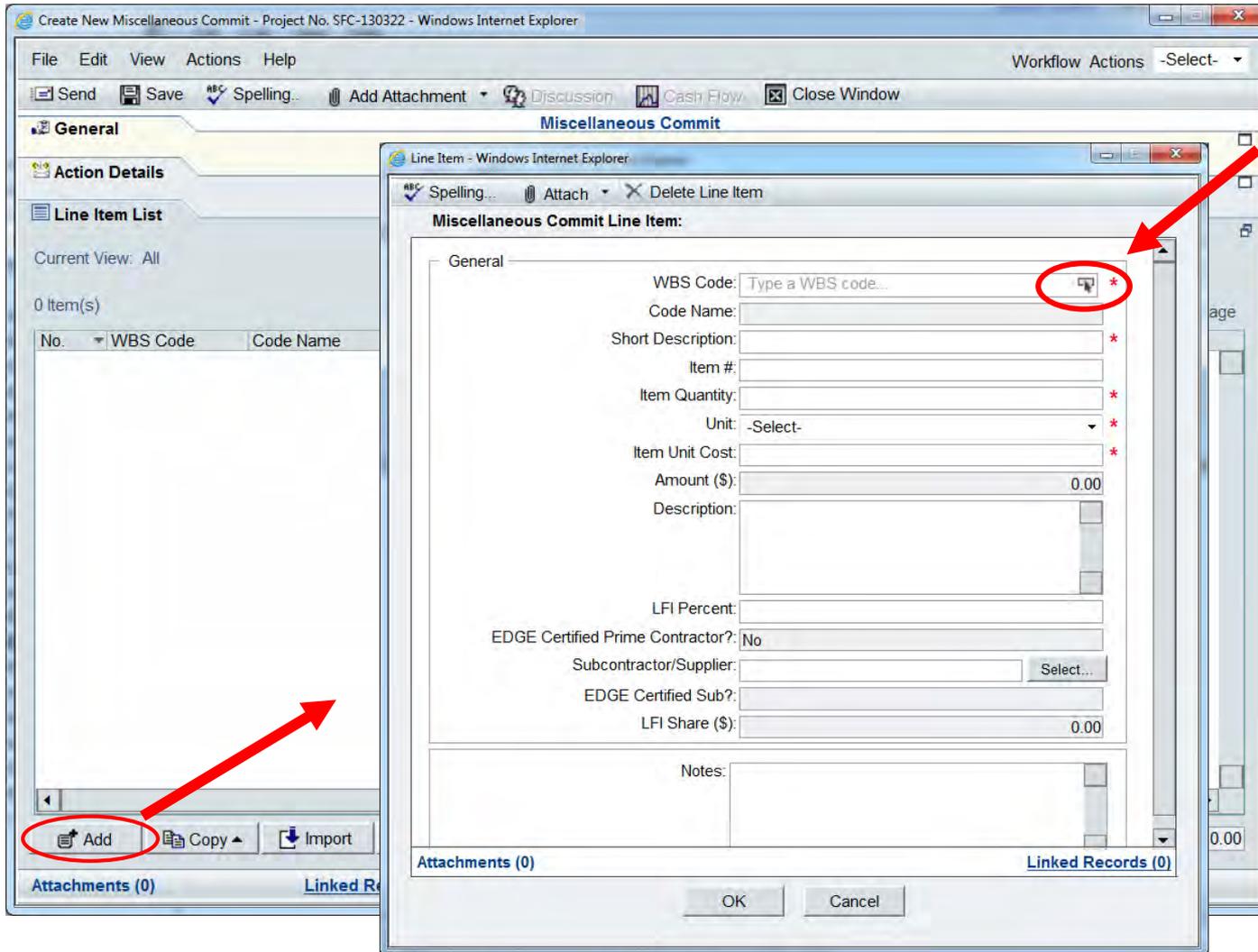
Action Details

Line Item List

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

Add Line Items

- ▶ Click Add to begin adding line item information
- ▶ Click the arrow next to WBS Code to select an appropriate code



Choose WBS Code

- ▶ Click Collapse to simplify the list

The image shows two overlapping browser windows from 'WBS Picker - Windows Internet Explorer'. The left window displays a 'Select WBS Code' interface with a list of codes. A red circle highlights the 'Collapse' button in the toolbar, with a red arrow pointing to it. The right window shows a detailed view of the selected WBS code, listing various WBS items.

WBS Code	WBS Item
1 PA-00-00	Property Acquisition Summary
5 RM-00-00	Relocation and Moving Summary
10 OR-00-00	Owner Expense Summary
30 AE-00-00	Professional Design Summary
62 CM-00-00	Construction Management Summary
90 CMR-00-00	Construction Manager at Risk Summary
109 DB-00-00	Design-Build Summary
136 CE-00-00	Construction Execution Summary
225 Cx-00-00	Commissioning Summary
247 FE-00-00	F F and E Summary
258 ES-00-00	Energy Services Summary

WBS Code	WBS Item
17 OR-OT-BE	OR Other Expense Budget
18 OR-OT-BC	OR Basic Commissioning
19 OR-OT-TI	OR Tests and Inspections
20 OR-OT-SU	OR Site Surveying Services
21 OR-OT-GT	OR Geotechnical Investigation
22 OR-OT-EN	OR Environmental Survey
23 OR-OT-PF	OR Partnering Facilitation
24 OR-OT-OT	OR Other Expense
25 OR-CF-00	Owner Contingency Fund
26 OR-CF-BE	Owner Contingency Fund Budget
27 OR-CF-OC	Owner Contingency Fund
28 OR-CF-AE	AE Change Order Allowance

Choose WBS Code

- ▶ Choose a WBS code by clicking the plus sign then highlighting the appropriate WBS code
- ▶ Click Select

The image shows two overlapping browser windows from 'ohio-train-unifier.oracleindustry.com'. The top window, titled 'WBS Picker - Windows Internet Explorer', displays a 'Select WBS Code' table. The bottom window, also titled 'WBS Picker - Windows Internet Explorer', displays a detailed view of the selected WBS code 'OR-PL-PL'.

Top Window: Select WBS Code

	WBS Code	
1	PA-00-00	Property Ac
5	RM-00-00	Relocation
10	OR-00-00	Owner Exp
30	AE-00-00	Professiona
62	CM-00-00	Construction
90	CMR-00-00	Construction
109	DB-00-00	Design-Buil
136	CE-00-00	Construction
225	Cx-00-00	Commission
247	FE-00-00	F F and E S
258	ES-00-00	Energy Ser

Bottom Window: Select WBS Code

	WBS Code	WBS Item
1	PA-00-00	Property Acquisition Summary
5	RM-00-00	Relocation and Moving Summary
10	OR-00-00	Owner Expense Summary
11	OR-OR-00	Owner Expense General
13	OR-PL-00	OR Planning Expense Summary
	OR-PL-BE	OR Planning Budget
15	OR-PL-PL	OR Planning
16	OR-OT-00	OR Other Expense General
25	OR-CF-00	Owner Contingency Fund
30	AE-00-00	Professional Design Summary
62	CM-00-00	Construction Management Summary
90	CMR-00-00	Construction Manager at Risk Summary
109	DB-00-00	Design-Build Summary
136	CE-00-00	Construction Execution Summary
225	Cx-00-00	Commissioning Summary
247	FE-00-00	F F and E Summary
258	ES-00-00	Energy Services Summary

A red circle highlights the 'Select' button in the top window. A red arrow points from the 'OR-00-00' row in the top window to the 'OR-PL-PL' row in the bottom window.

Add Line Items

- ▶ WBS Code will populate
- ▶ Add a short description, Amount, LFI Percent (if necessary)
- ▶ Add any additional information
- ▶ Click OK

Line Item - Windows Internet Explorer

https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=forr

Spelling... Attach Delete Line Item

Miscellaneous Commit K12 Line Item:

General

WBS Code: OR-PL-PL

Code Name: OR Planning

Short Description: Planning Expense

Amount (\$): \$5,000.00

LFI Percent: 12

Subcontractor/Supplier: Select...

Description: Planning Expense

District: Oak Hills Local SD

Associated Building: Select...

Details

EDGE Certified Prime Contractor?:

EDGE Certified Sub?:

Attachments (0) [Linked Records \(0\)](#)

OK Cancel

Create a Record

- ▶ Line Item will be populated in the Line Item List
- ▶ Total Amount is reflected below

The screenshot displays a web browser window titled 'Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer'. The URL is https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2961&module_name=umck&csvimport=fa. The page shows a form for creating a 'Miscellaneous Commit K12'. The 'Line Item List' section is active, showing a table with one item. The table has columns for No., WBS Code, Code Name, Short Description, Amount, LFI Percent, LFI Share (\$), and Associated Build. The single row contains: 001, OR-PL-PL, OR Planning, Planning Expense, \$5,000.00, 12, \$600.00. Below the table, there is a 'Total Amount:' field with a value of \$5,000.00. The page also includes navigation buttons like Add, Copy, Import, Remove, Grid, and Find, and links for Attachments (0), Linked Records (0), General Comments, and Linked Mail (0).

No.	WBS Code	Code Name	Short Description	Amount	LFI Percent	LFI Share (\$)	Associated Build
001	OR-PL-PL	OR Planning	Planning Expense	\$5,000.00	12	\$600.00	

Total Amount: \$5,000.00

Create a Record

- ▶ Line Item total populates in the upper form
- ▶ **Difference should always be \$0**

Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=158680&id=6025&sourceId=0&project

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

General Miscellaneous Commit K12

Vendor Name: School Planning Services, LLC * Prevailing Wage: -Select-

Description

Description: Planning for school construction

Additional Information

Amount (\$):	\$5,000.00 *
Line Item Total (\$):	\$5,000.00
Difference (\$):	\$0.00
Total LFI Share (\$):	\$800.00

Notes:

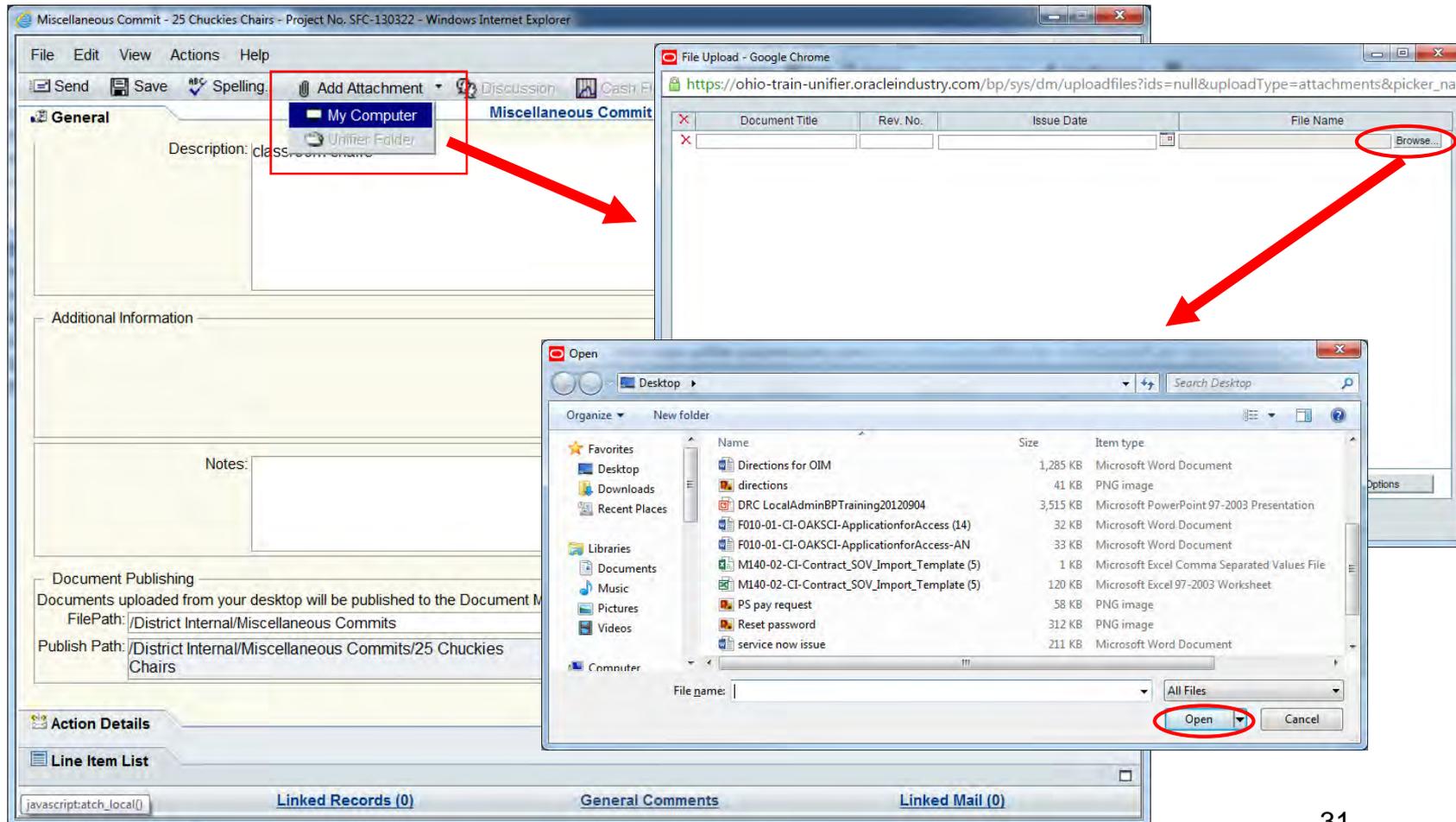
Action Details

Line Item List

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

Add Attachments

- ▶ To add any additional documentation
 - ▶ Click Add Attachment
 - ▶ Choose My Computer and locate your documents
 - ▶ Click Open then Click OK



Complete the Record

- ▶ Click Action Details tab

Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=158680&id=6025&sourceId=0&project

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

Miscellaneous Commit K12

General

Vendor Name: School Planning Services, LLC * Prevailing Wage: -Select-

Description

Description: Planning for school construction

Additional Information

Amount (\$):	\$5,000.00 *
Line Item Total (\$):	\$5,000.00
Difference (\$):	\$0.00
Total LFI Share (\$):	\$600.00

Notes:

Action Details

Line Item List

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

Complete the Record

- ▶ Choose a Workflow Action
- ▶ Notice the Action details pane populates with recipient of the record

Workflow Actions: Submit

Submit

Vendor Name: School Planning Services, LLC

Prevailing Wage: -Select-

Description: Planning for school construction

Submit

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

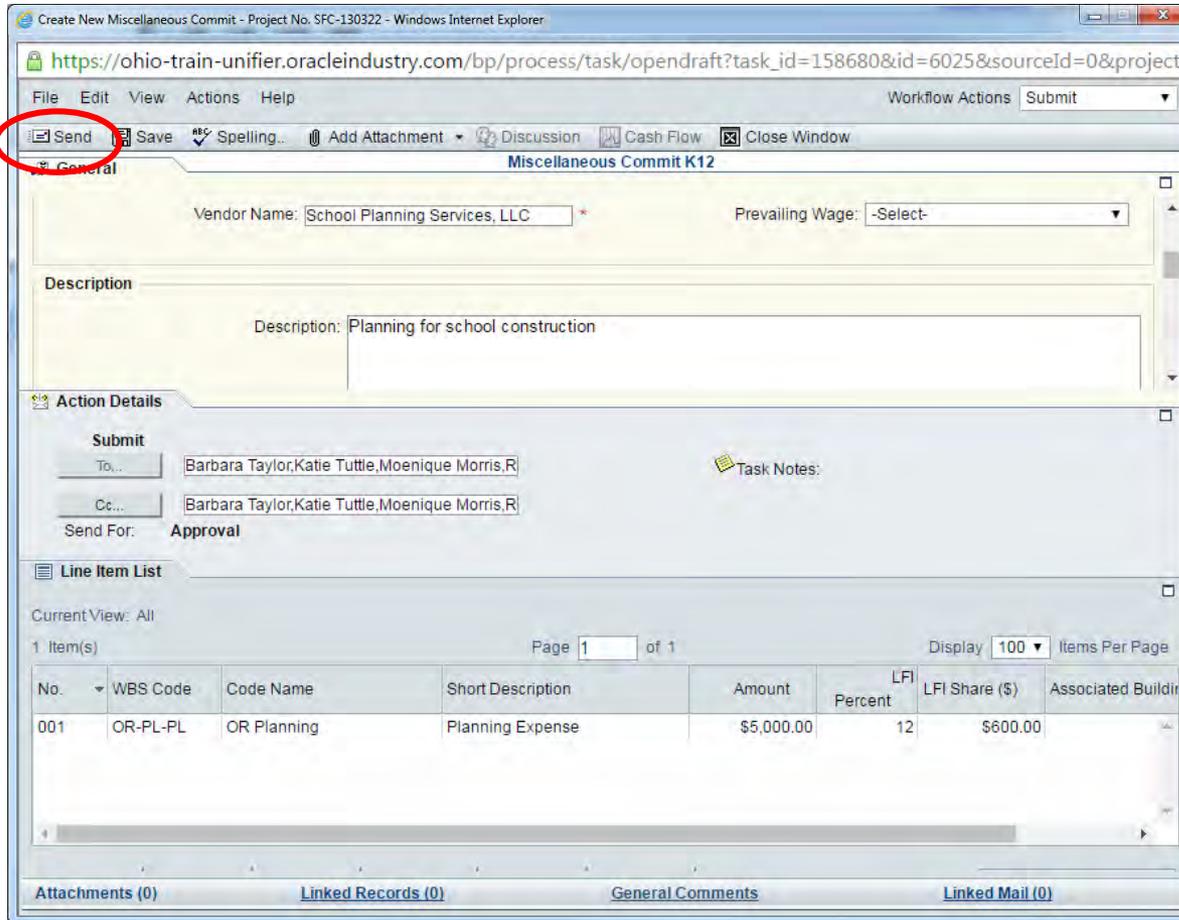
Cc... Barbara Taylor, Katie Tuttle, Moenique Morris, R

Send For: Approval

No.	WBS Code	Code Name	Short Description	Amount	Percent	LFI Share (\$)	Associated Building
001	OR-PL-PL	OR Planning	Planning Expense	\$5,000.00	12	\$600.00	

Send the Record

- ▶ Click Send



Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=158680&id=6025&sourceId=0&project

File Edit View Actions Help Workflow Actions Submit

Send Save Spelling... Add Attachment Discussion Cash Flow Close Window

General Miscellaneous Commit K12

Vendor Name: School Planning Services, LLC * Prevailing Wage: -Select-

Description

Description: Planning for school construction

Action Details

Submit

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

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

Send For: **Approval** Task Notes:

Line Item List

Current View: All

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

No.	WBS Code	Code Name	Short Description	Amount	Percent	LFI	LFI Share (\$)	Associated Building
001	OR-PL-PL	OR Planning	Planning Expense	\$5,000.00	12		\$600.00	

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

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

Working with Tasks



Receive an Email

Applications for Payment K12 PR-0005 is sent to you for District Approval. -...

File Message Tell me what you want to do...

Delete Reply Reply All Forward Delete Respond Quick Steps Move Assign Policy Tags Editing Zoom

Chillicothe To Manager Team Email Move Assign Policy Tags Editing Zoom

Mon 4/18/2016 1:55 PM

Primavera Unifier - Katie Tuttle,soo <Primavera_Notification@oracle.com>

Applications for Payment K12 PR-0005 is sent to you for District Approval.

To Tuttle, Katie

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

Applications for Payment K12 PR-0005 is sent to you for District Approval.

From: **Katie Tuttle**
Sent For: **District Approval**
Task Due Date:

Source Name: **OAKS CI District Training Project 1**
Record No: **Applications for Payment K12 PR-0005**
Title: **Test**

Additional Information:

[Click here](#) to log into Unifier and take a workflow action.

For Oracle technical assistance <http://www.oracle.com/us/support>

Reviewing a Task

The screenshot shows a software application window with a menu bar (File, Edit, View, Help) and a toolbar (New, Open, Find). The left sidebar contains a tree view of folders, with 'Tasks' highlighted. The main area displays a table of tasks. A red box highlights the 'Tasks' folder in the sidebar, and a red arrow points to the first row of the task list. A text box above the arrow contains the instruction: 'Choose the task you need to review and double click to open'.

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Design Reviews	DR-0009			Shauna Hook	Initial Review	12/12/2009	12/09/2009
Design Reviews	DR-0008			Shauna Hook	Initial Review	12/07/2009*	12/04/2009
Professional Services /	Amend-001	oci090001-amen		Consultant St	Amendment P		12/04/2009
Professional Services /	Amend-001	OCI 090001-Ame		Consultant St	Amendment P		12/04/2009
Professional Services /	Amend-001	OCI-090001- Am		Consultant St	Amendment P		12/04/2009
Professional Services /	Amend-000	OCI-099 Amend 1		Shauna Hook	Amendment P		12/04/2009
Subcontractor/Supplier	SSD-0077	ben and jerrys cc		Consultant St	PM Declaratio		12/04/2009
Subcontractor/Supplier	SSD-0076	Ben and Jerry's c		Consultant St	PM Declaratio		12/04/2009
Subcontractor/Supplier	SSD-0075	Ben and Jerry's c		Shauna Hook	PM Declaratio		12/04/2009
Subcontractor/Supplier	SSD-0074	Ben and Jerry's c		Consultant St	PM Declaratio		12/04/2009
Action Items	AI-00241	12/04/09 Visit	12/11/2009	Shauna Hook	Review		12/04/2009
Action Items	AI-00238	Today's visit	12/10/2009	Shauna Hook	Response		12/03/2009
Subcontractor/Supplier	SSD-0073	Ben and Jerry's		Oaks Student	Associate Dec	11/27/2009*	11/24/2009
Subcontractor/Supplier	SSD-0072	Ben and Jerry's		Oaks Student	Associate Dec	11/27/2009*	11/24/2009
Subcontractor/Supplier	SSD-0070	Ben and Jerry's		Shauna Hook	Associate Dec	11/27/2009*	11/24/2009
Professional Services A	agree-0010	Hasenstab Archt		Oaks Student	Technical Proj		11/19/2009
Professional Services /	agree-0008	oec		Oaks Student	Technical Proj		11/19/2009
Professional Services A	agree-0007	Firm Name		Shauna Hook	Technical Proj		11/19/2009
Professional Services /	agree-0006	firm name		Oaks Student	Technical Proj		11/19/2009
Contract Schedule of V	C SOV-0023	Test		Shauna Hook	Associate App		11/19/2009
Action Items	AI-00221	11/19/2009 Field	11/26/2009*	Oaks Student	Response		11/19/2009
Professional Services /	agree-0005	DYS 0999- Sands		Shauna Hook	Contract Prep		11/19/2009
Submittals	SUB-0014	Link record to su		Oaks Student	Associate Rev	12/03/2009*	11/19/2009
Request for Interpretati	RFI-00011	yoyoy		Oaks Student	Associate Rev	11/21/2009*	11/18/2009
Contract Schedule of Va	C SOV-0022	Proj-01		Oaks Student	Associate App		11/18/2009

Reviewing a Task

https://oaksci.training.ohio.gov/?task_id=29561&parent_id=0&viewOnly=0&project_id=1009 - Design - Windows Internet Explorer

File Edit View Actions Help

Accept Task Decline Task

Design Reviews

General

General

Org: College

Project Number: OCI-080002

Project Name: OAKS CI Training 2

Project Location: Surface Road

Est. Construction Cost (\$): 0.00

Record Number: DR-0009

Creator: Shauna Hooks

Creation Date: 12/09/09

Status: Pending

Owner Name: North Central State College

Task Details

From: Shauna Hooks

To: Project Manager:Becky Bessell; More...

Task Due Date: 12/12/2009

Task Status: Not Started

Task Notes (0)

Cc:

Sent For: Initial Review

Design Reviews

Attachment Index : (3)

Display Attachments with Comments by: All

New Rename Move Delete 3 Item(s) Page 1 of 1 Display 100 items per page

File Name	Type	Status
Design	Drawings	Submitted
Design	Shop Drawing	Submitted
Design	Informational	Accepted

Comments Download Find

Linked Records (0) General Comments Linked uMails (0)

Click Accept Task

Note: Click to add a temporary note that will go only to the next person in the workflow

Responding to a Task

Select Appropriate Workflow Action

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

Workflow Actions

- Select-
- Select-
- Return For Clarification
- Send For Detailed Review

General

Organization: North Central State College
Project Number: OCI-080002
Project Name: OAKS CI Training 2
Project Location: Surface Road
Est. Construction Cost (\$): 0.00

Record Number: DR-0008
Creator: Shauna Hooks
Creation Date: 12/04/2009 01:40 PM Local (GMT-5)
Status: Pending
Owner Name: North Central State College

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Design Reviews

Attachment Index : (3)

Display Attachments with Comments by: All

Page 1 of 1

Display 100 items per page

File Name	Type	Status
done.txt	Energy Analysis	Submitted
done.txt	Energy Analysis	Submitted
well.sdr	Drawings	Submitted

General Comments

Responding to a Task

Click Send

Click the "To" box and choose the next person to get the task

Note: When Workflow action is selected the Action Details (To: box) tab updates

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



Finding the Record Status

The screenshot shows a software application window with a sidebar on the left and a main content area on the right. The sidebar contains a tree view of project categories, with 'Logs' and 'Professional Services Pay Request' circled in red. The main content area displays a table of records for 'Professional Services Pay Request'.

Professional Services Pay Request - Current View: All
2 Item(s) Page 1 of 1

Title	Agreement Name	Provider	Amount	Final Payment?	Status	Record Number
Garys Arch. PR#1	Star Consultants	Star Consultants, Inc.	7,500.00	No	Pending	PSPR--0002
PR 1	Star Consultants	Star Consultants, Inc.	16,000.00	No	Pending	PSPR--0001

A red arrow points to the 'Status' column of the table.

Finding the Record Status

The screenshot shows a web browser window with the URL https://oaksci.training.ohio.gov/?srcid=500&model=upspr&fromcostlog=1&project_id=1009. The page title is "Professional Services Pay Request".

General

Organization: North Central State College
Project Number: OCI-080002
Project Name: OAKS CI Training 2
Project Location: Surface Road
Title: Garys Arch. PR#1

Record Number: PSPR--0002
Creator: Shauna Hooks
Creation Date: 12/09/2009 11:34 AM Local (GMT-5)
Status: Approved
Internal Ref. Number:

Task Details

From: Shauna Hooks;
To: Owner Financial:Becky Bessell; More...
Cc:
Sent For: Payment Process

Task Due Date:
Task Status: **Not Started** (circled in red)
Task Notes (0)

Pay Request Details

Show Currency in: Transaction Currency
1 Item(s) Page 1 of 1 Display 100 items per page

No.	WBS Code	Code Name	Short Description	Amount
001	AE-BS-DD	AE Design Development Service	Redesign	7,500.00

Find Total Amount: \$ 7,500.00

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

Finding the Record Status

https://oaksci.training.ohio.gov/?processId=2010&selected_node_id=1544 - BP Progress - Windows Internet Explorer

Workflow Progress

Title: Garys Arch. PR#1 Current Step: [Payment Process](#)

Record No: PSPR--0002 BP Setup used: Professional Services Pay Request

Due Date:

Step Name	Completion Rule	Status
Creation	Any User	Completed
PM Approval	Any User	Completed
Updates	Any User	Not Started
PM Supervisor Approval	Any User	Not Started
Owners Representative Payment Authorizal	Any User	Completed
Payment Request Validation	Any User	Completed
Payment Process	Any User	Not Started
End	Any User	Not Started

Tasks for the selected step:

Assignee	Company	Status	Action	Due Date	Completion Date
Shauna Hooks	soo	Completed	Recommend Approv:		12/09/2009 11:38 AM I
Shauna Hooks	soo	Closed	Return for Clarificatio		12/09/2009 11:37 AM I

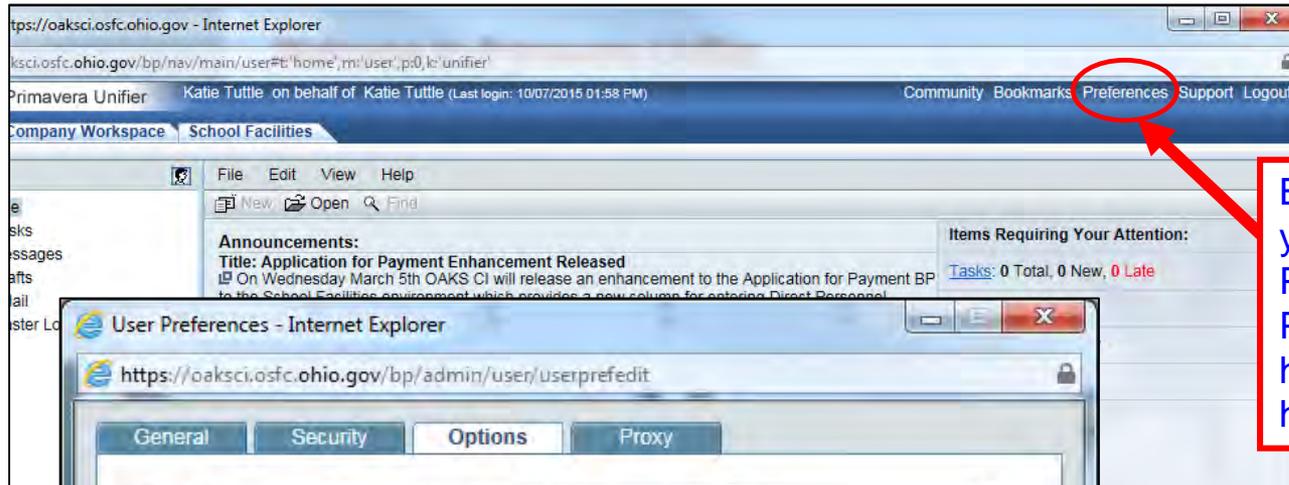
Document Manager

About Document Manager

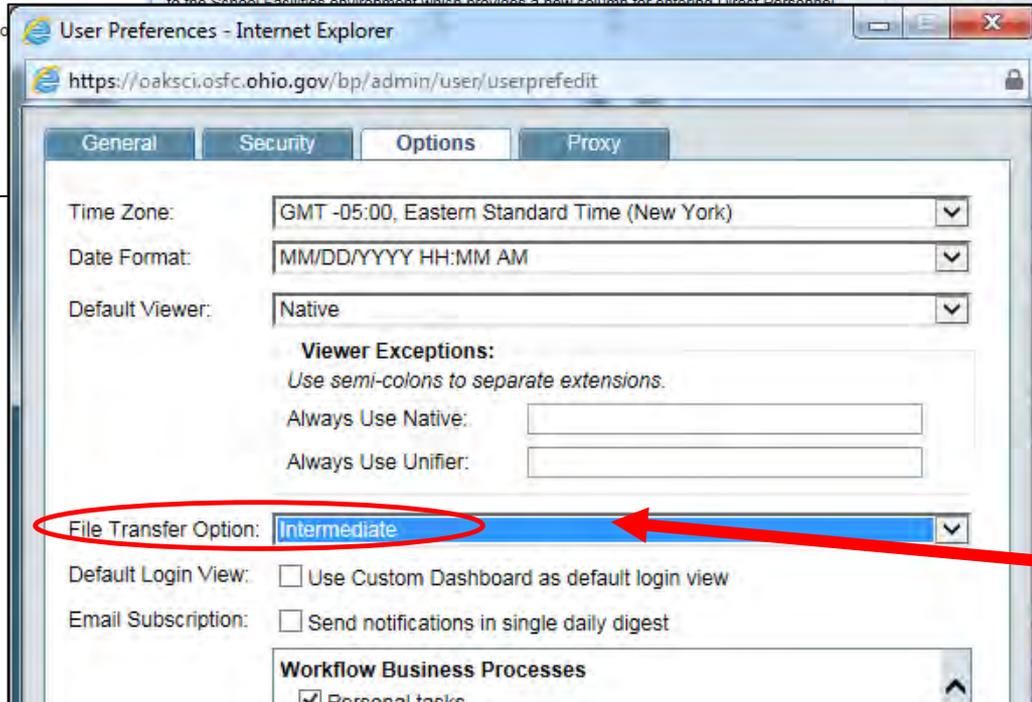
- ▶ Document Manager houses all of your supporting documentation
- ▶ All documents must be uploaded into Document Manager first before they can be attached to a record
- ▶ Provides a platform for maintaining a wide variety of files and documents
- ▶ Ensures that project participants are always working on the most current versions
- ▶ Provides ready access to all documents from anywhere at any time

Preferences

Note: Intermediate level does not appear to be compatible with IE or Chrome, however, Firefox appears to be successful.



Before uploading, check your File Transfer Preferences by clicking Preferences at the right hand corner of your homepage



Under the Options Tab, select Intermediate for your File Transfer Option

Document Upload

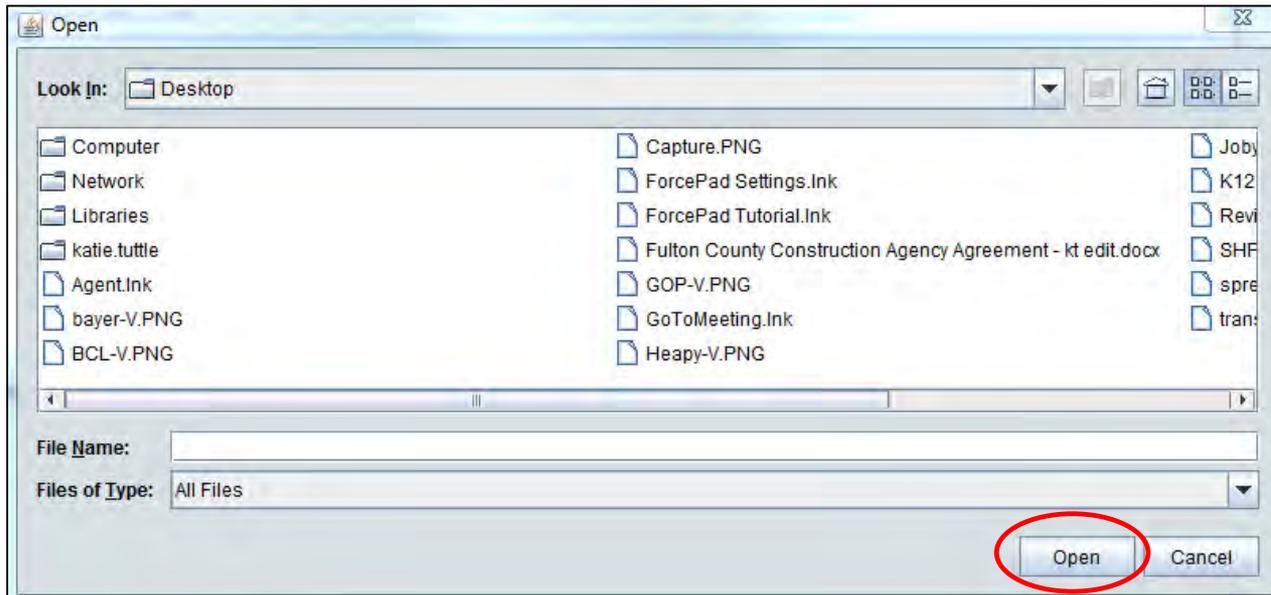
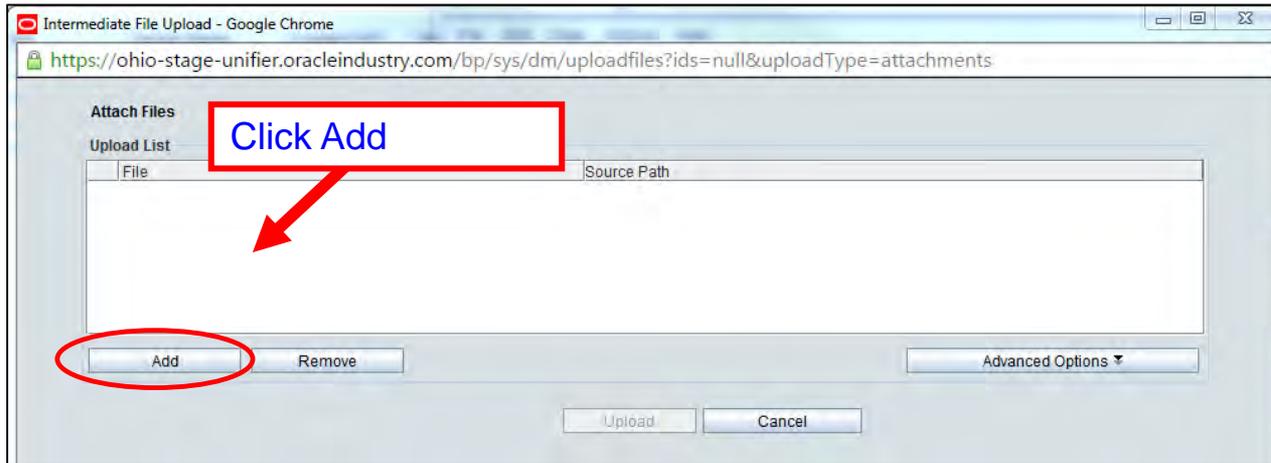
The screenshot displays the Primavera Unifier web interface. The browser address bar shows the URL: <https://oaksci.osfc.ohio.gov>. The user is logged in as Katie Tuttle. The interface includes a navigation menu on the left with options like Alerts, uMail, Mailbox, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Documents, Unpublished Documents, Logs, and Reports. The 'Documents' folder is selected. The main content area shows a list of documents with columns for Ref, BP, Name, Size, Upload Date, Owner, and Title. The 'Upload' button in the top toolbar is highlighted with a red circle and a red arrow pointing to a text box labeled 'Click Upload'. Another red arrow points from the 'Documents' folder in the left navigation menu to a text box labeled 'Choose folder'.

Click Upload

Choose folder

Ref	BP	Name	Size	Upload Date	Owner	Title
		+ A_E			Rita Nichols	
		+ District			Rita Nichols	
		0300 Construction			Jamie Trombley	
		A_E Internal			Rita Nichols	
		CoP Internal			Rita Nichols	
		Cx Internal			Rita Nichols	
		District Internal			Rita Nichols	
		OA Internal			Rita Nichols	
		OFCC Director Intern			Rita Nichols	
		PC Internal			Rita Nichols	
		PM Internal			Rita Nichols	
		PM Supervisor Intern			Rita Nichols	
		Program Services Inte			Rita Nichols	
		0300 Construction			Rita Nichols	
		Recycle Bin				

Document Upload- Intermediate



Document Upload– Intermediate

Intermediate File Upload - Google Chrome

<https://ohio-stage-unifier.oracleindustry.com/bp/sys/dm/uploadfiles?ids=null&uploadType=attachments>

Attach Files

Upload List

File	Source Path
GOP-V.PNG	C:/Users/katie.tuttle/Desktop/GOP-V.PNG

Add Remove Advanced Options

Upload Cancel

You should see your document here

Click Upload. You will now have your document available in Document Manager.

Document Upload

The screenshot shows the Primavera Unifier web interface. The browser address bar displays `https://oaksci.osfc.ohio.gov/bp/nav/main/user#`. The user is identified as Katie Tuttle. The interface includes a navigation menu on the left with options like Alerts, uMail, Mailbox, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Documents, Unpublished Documents, Logs, and Reports. The main content area shows a file explorer view for the 'Meeting Minutes' folder, displaying two items:

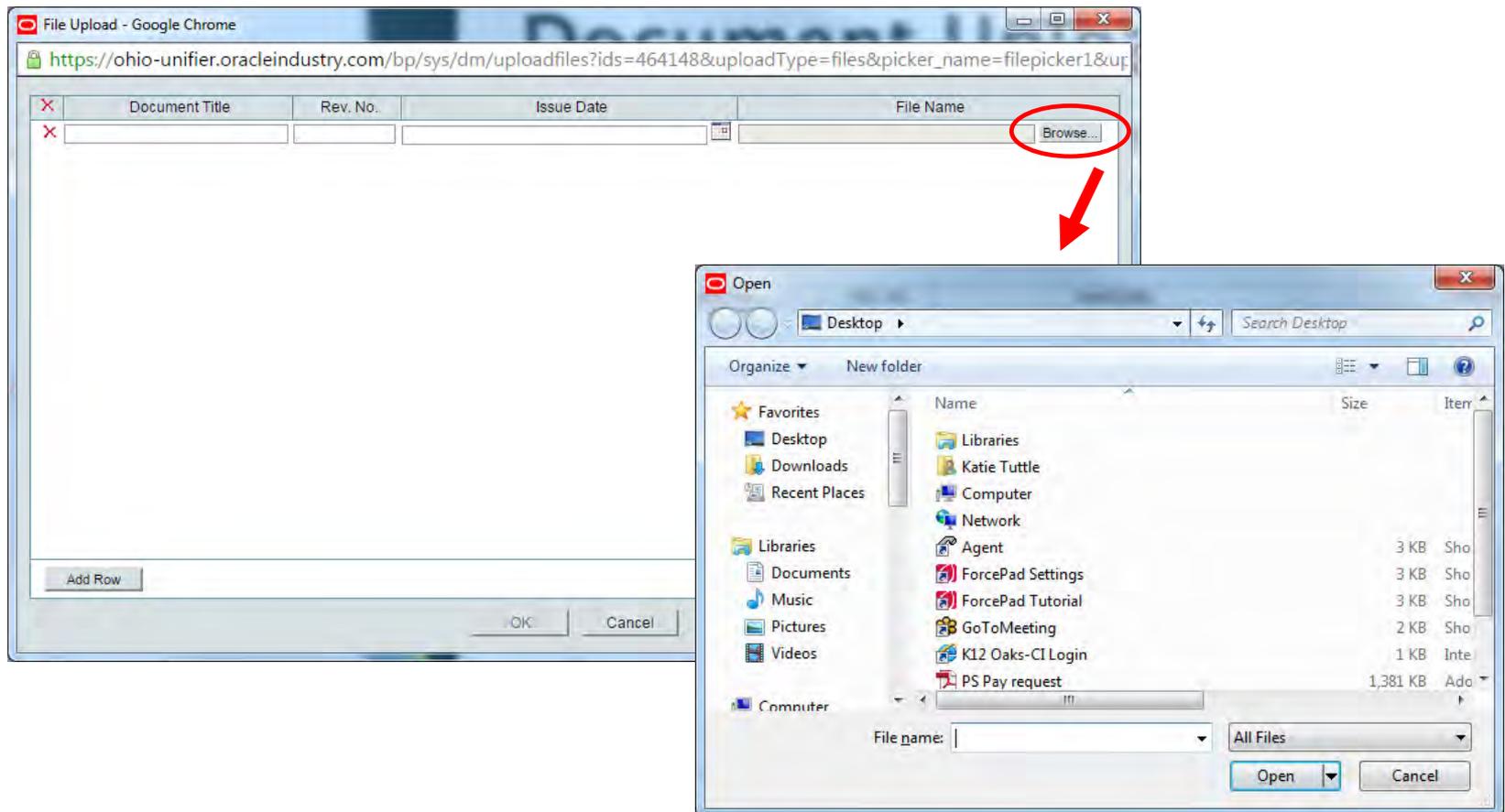
Ref	BP	Name	Size	Upload Date	Owner	Title
		150914 ECM Minutes 27.pc	10 MB	12/28/2015	Liesl McNamee	
		151013 ECM Minutes 28.pc	9 MB	02/08/2016	Liesl McNamee	

A red arrow points to the table with a text box that says: "You should see your document here".

- ▶ Now that your documents have been uploaded into Document Manager they can now be attached to Records

Document Upload–Basic

- ▶ If you get an error message or a blank screen when attempting to upload your documents, you may need to change your **File Transfer Option** to **Basic** in your **Preferences**.
- ▶ With Basic upload, you can only add one document at a time



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211