



K-12 Intro 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 displays ofcc.ohio.gov/OAKSCI.aspx. The main navigation menu includes 'About', 'Documents', 'Services / Programs', 'News / Events', 'Opportunities', 'OAKS CI', 'Resources', and 'Gallery'. The 'OAKS CI' menu item is circled in red, with a red arrow pointing to it. 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 features three columns of training 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 this section is a 'Contacts & Forms' area 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?

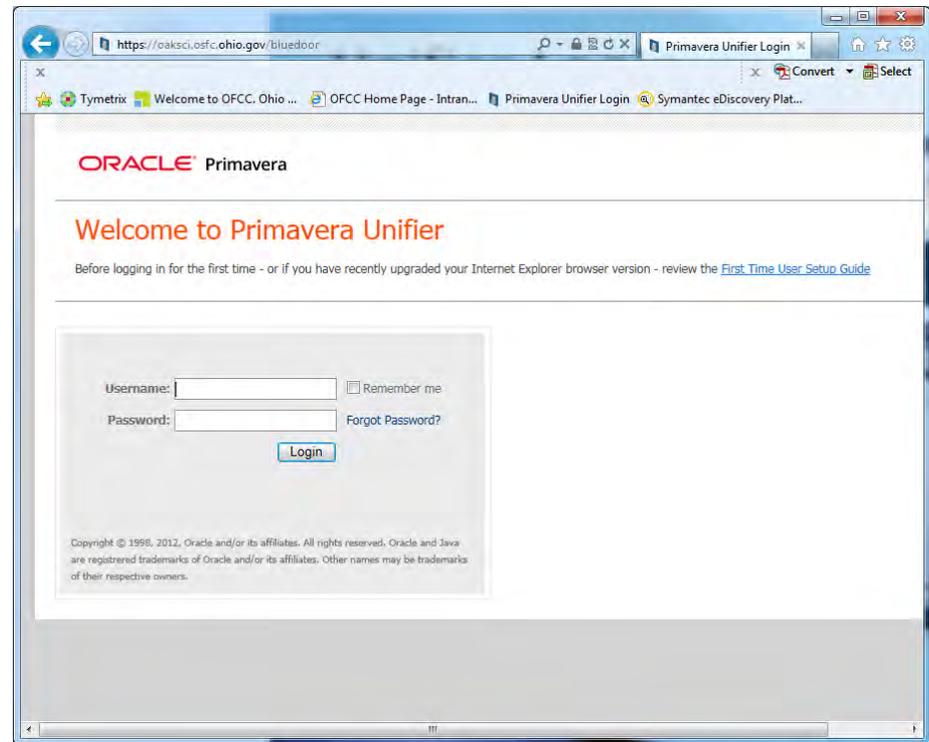
- ▶ Tracks your project progress
- ▶ Automates workflows (based on Ohio Facilities Construction Commission forms and procedures)
- ▶ Allows for improved project communication and collaboration
- ▶ Housed in the Cloud so you can utilize any browsing tool to access
- ▶ Now includes DocuSign which minimizes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

Navigating OAKS CI

Navigate to OAKS CI

- Open Internet Explorer (**Must use Version 9 or earlier**)
- 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 displays the Primavera Unifier web interface. At the top, the browser address bar shows 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 currently selected, as indicated by a red arrow and a callout box labeled 'Cross project tabs'. The interface features a 'User Mode' section, a menu bar (File, Edit, View, Help), and a sidebar with navigation options like Home, Tasks, Messages, Drafts, and uMail. The main content area is divided into sections: 'Announcements' (with a red arrow pointing to it and a callout box labeled 'Announcements'), 'Items Requiring Your Attention' (listing 42 total tasks, 34 new, and 5 late), and 'Tasks or New uMails' (a table listing projects and their task status). The table data is as follows:

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 from the table to a callout box labeled '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

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: Building Project

Building Project - Current View: All

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

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

Building Project view will allow you to view all School Districts you may access

Double Clicking the Building project will take you to the Building project's homepage

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 tabs include "Home", "Company Workspace", and "Projects". The left sidebar shows a tree view under "Projects (Standard)" with "OAKS CI Training 2 - Home" expanded, listing items like Summary, Alerts, uMail, Collaboration, Tasks, Messages, Drafts, Information, Cost Manager, Data Manager, Document Manager, Schedule Manager (Basic), Logs, and Reports. A red arrow points from the "Collaboration" item in the sidebar to a red-bordered box on the right. The main content area displays "OAKS CI Training 2 - Home" with a menu (File, Edit, View, Help) and a toolbar (New, Open, Find). Below the menu is a photograph of a modern building. The project details are as follows:

Project Number: OCI-080002
Project Phase:
Location: [4200 Surface Road Columbus, Ohio, 43228, US](#)
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 Widgeits	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

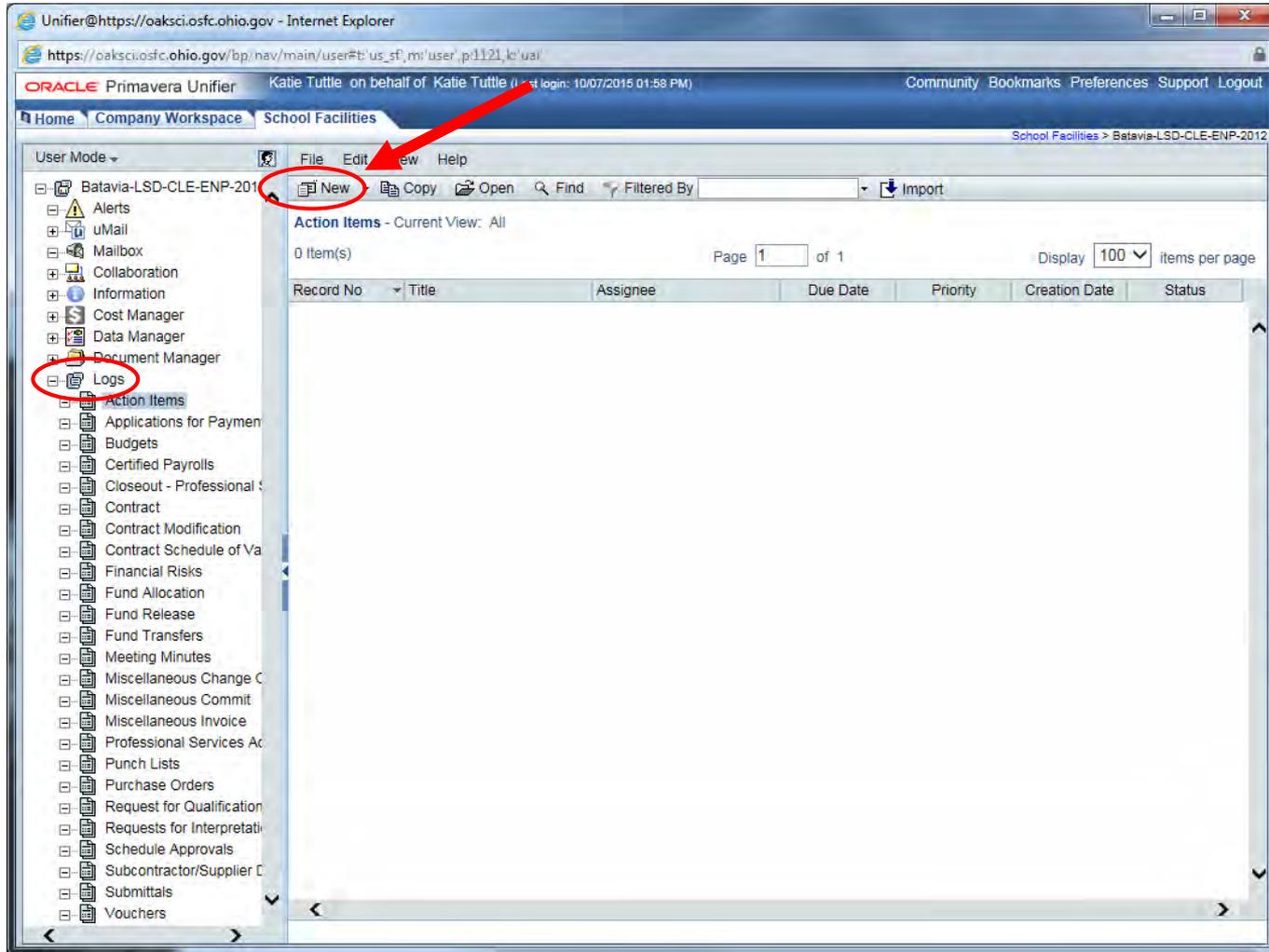
Users will see the types of BPs (Records) for which they have permissions

How do Records Work?



Create a Record

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



Add Information

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

Create New Action Items - Project No. SFC-130336 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1121&module_name=uai&csvimport=false

File Edit View Actions Help Workflow Actions -Select-

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

Action Items

General

Organization: Department of Administrative Services Record Number:

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: Agency General Projects Test Creation Date:

Project Location: OAKS CI Administration

Title: Test Action Item * Status:

Assignee: Bob Smith Priority: High

Meeting Minute: Select... Due Date: 11/10/2015 05:27 AM (UTC-8) *

Action

Action Requested: Please review the attached documents *

Action Details

Collaboration

Linked Records (0) Linked Mail (0)

Add Attachments

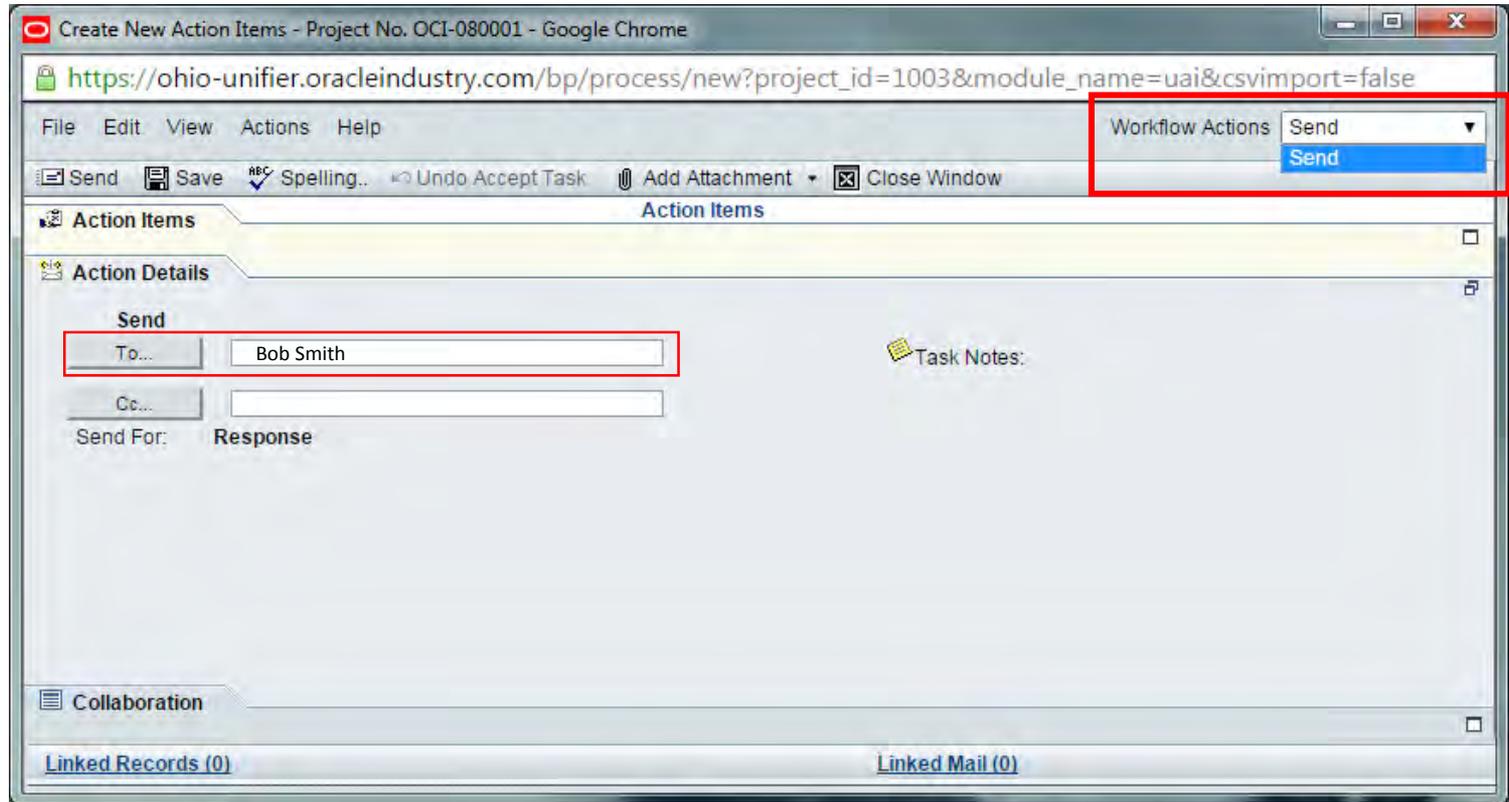
- ▶ **Note:** Documents must first be uploaded to Document Manager
- ▶ To add any additional documentation
 - ▶ Click Add Attachment
 - ▶ Choose Unifier Folder and locate your documents
 - ▶ Click Open then Click OK

The screenshot shows a web application interface for creating new applications for payment. The main window is titled "Create New Applications for Payment - Project No. SFC-130300 - Internet Explorer". The URL is https://oaksci.dev.osfc.ohio.gov/bp/process/new?project_id=1002&module_name=ucpr&csvimpobj=files. The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". The "Add Attachment" button is highlighted with a red box, and a red arrow points to the "Unifier Folder" option in the dropdown menu. The "General" tab is active, showing fields for Organization, Project Number, Project Name, Project Location, Title, Assignee, and Meeting Minute. The "Action" section shows "Action Requested: Please review the attached documents". A "Select Files" dialog box is open, showing a tree view of folders and a table of files. The table has columns for Name, Size, and Upload Date. The file "F010-01-CI-OAKSCI-Applic" is selected.

Ref	BP	Name	Size	Upload Date	On
		F010-01-CI-OAKSCI-Applic	33 KB	04/25/2016	Ri

Send the Record

- ▶ Choose a Workflow Action
- ▶ Click Send

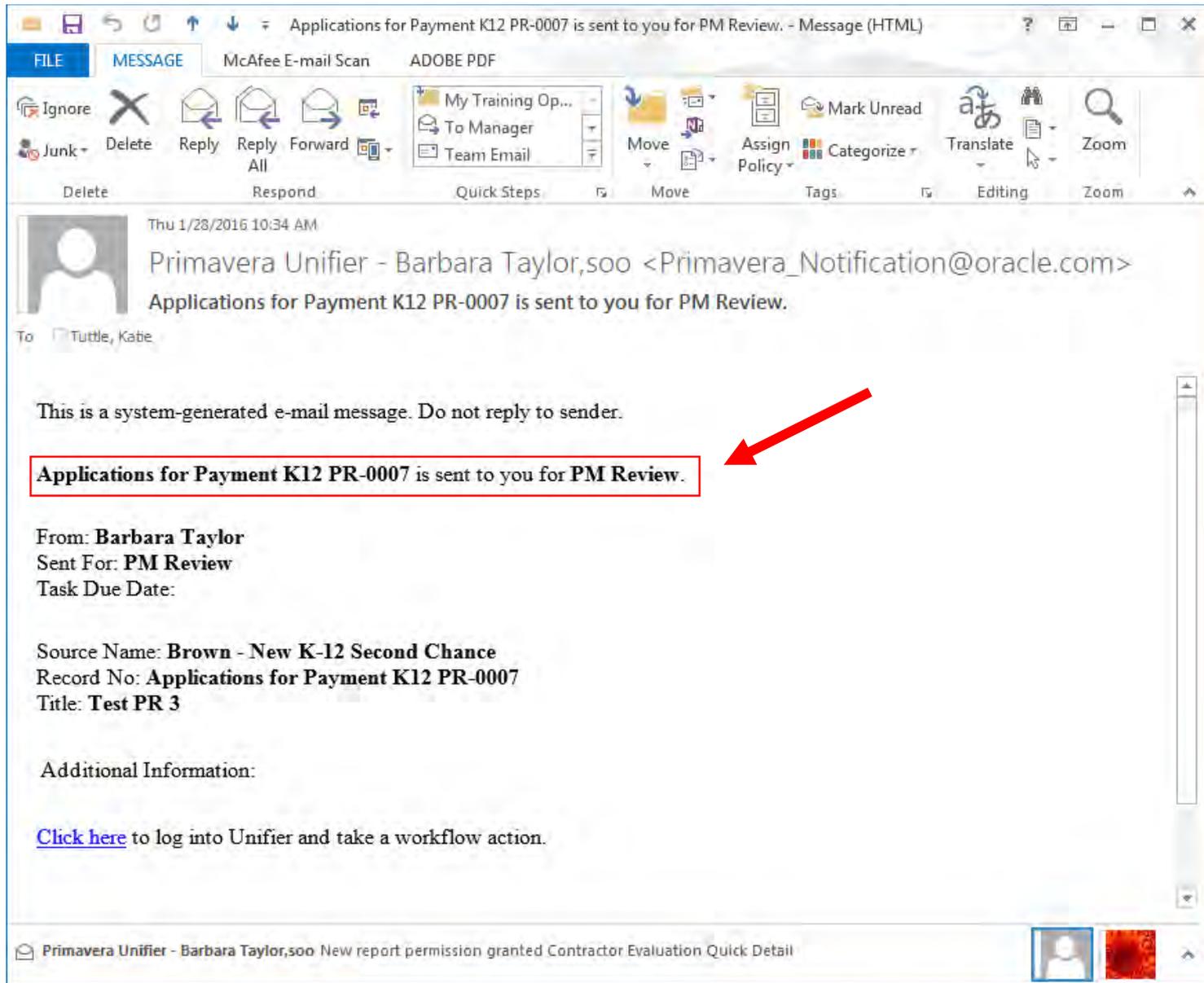


This record is now going to be Bob Smith's TASK.

Working with Tasks



Receive an Email



Applications for Payment K12 PR-0007 is sent to you for PM Review. - Message (HTML)

FILE MESSAGE McAfee E-mail Scan ADOBE PDF

Ignore Delete Reply Reply Forward All Move Assign Policy Mark Unread Translate Zoom

Delete Respond Quick Steps Move Tags Editing Zoom

Thu 1/28/2016 10:34 AM

 Primavera Unifier - Barbara Taylor,soo <Primavera_Notification@oracle.com>
Applications for Payment K12 PR-0007 is sent to you for PM Review.

To Tuttle, Kate

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

Applications for Payment K12 PR-0007 is sent to you for PM Review.

From: **Barbara Taylor**
Sent For: **PM Review**
Task Due Date:

Source Name: **Brown - New K-12 Second Chance**
Record No: **Applications for Payment K12 PR-0007**
Title: **Test PR 3**

Additional Information:

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

Primavera Unifier - Barbara Taylor,soo New report permission granted Contractor Evaluation Quick Detail

Reviewing a Task

The screenshot shows a software interface with a left sidebar and a main content area. The sidebar contains a tree view of folders, with 'Tasks' highlighted by a red circle. The main content area displays a table of tasks. A red box highlights the first two rows of the table, with an arrow pointing to the first row. A text box above the table 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 I	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 Archi		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:

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

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)

Sent For: Initial Review

Design Reviews

Attachment Index : (3)

Display Attachments with Comments by: All

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)

Responding to a Task

Select Appropriate Workflow Action

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

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)

New Rename Move Delete

Attachments

3 Item(s)

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

Add Comments Import Remove Comments Download Find

General Comments

Linked Records (0) Linked uMails (0)

Responding to a Task

https://oaksci.training.ohio.gov/?srcid=26&model=udr&fromcostlog=1&project_id=1009 - Design Rev - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Send For Detailed Review

Send Save Spelling... Discussion

Design Reviews

General

Action Details

Send For Detailed Review (Click here to view latest content)

To... Becky Bessell, Consultant Student1, Consulta Task Due: 12/19/2009 Task Notes:

Cc...

Send For: Detailed Review

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

Design Reviews

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

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 titled 'Professional Services Pay Request - Current View: All' with 2 items. A red arrow points to the 'Status' column of the table.

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

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
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

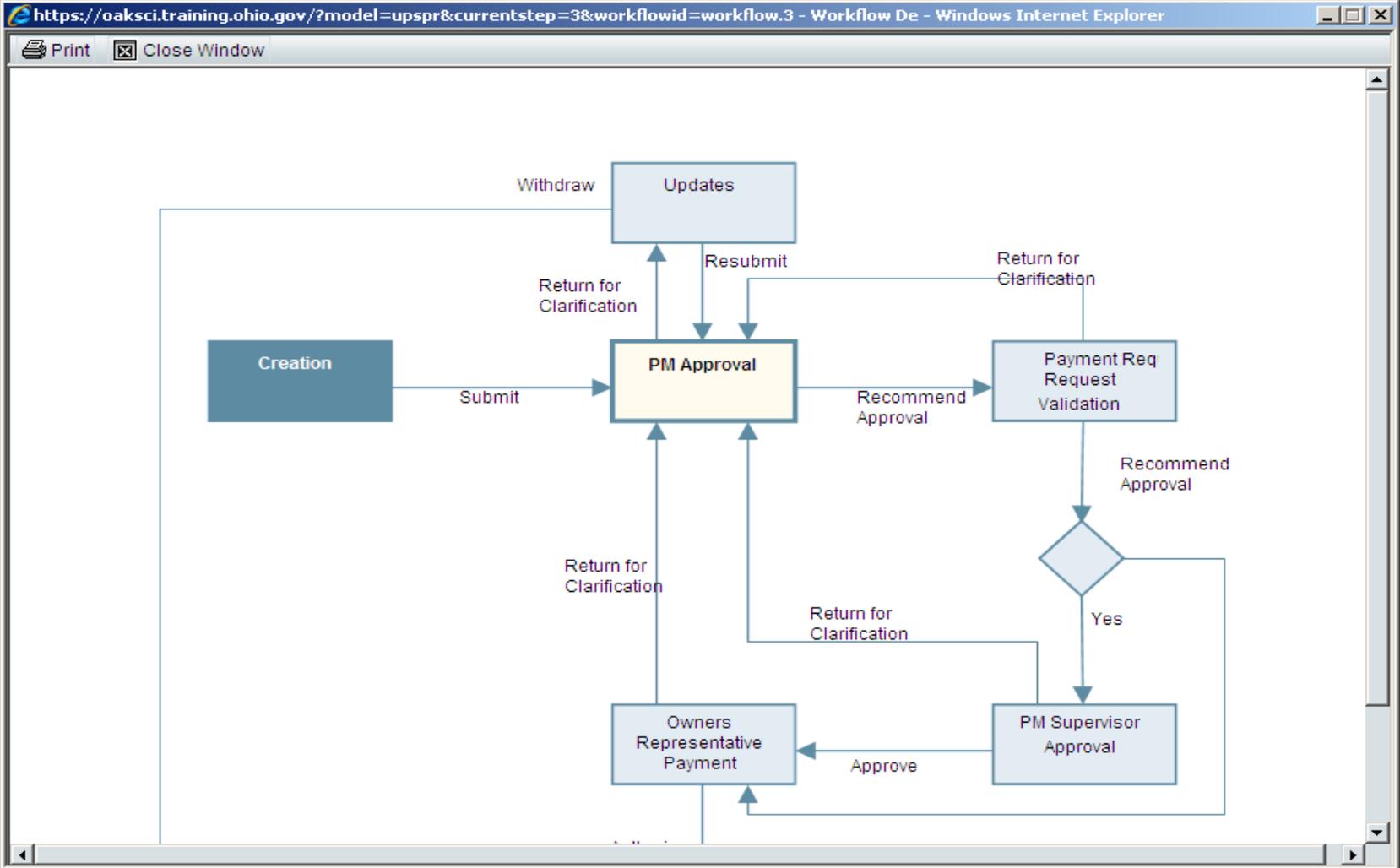
Tasks for the selected step:

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





Graphic View of Workflow



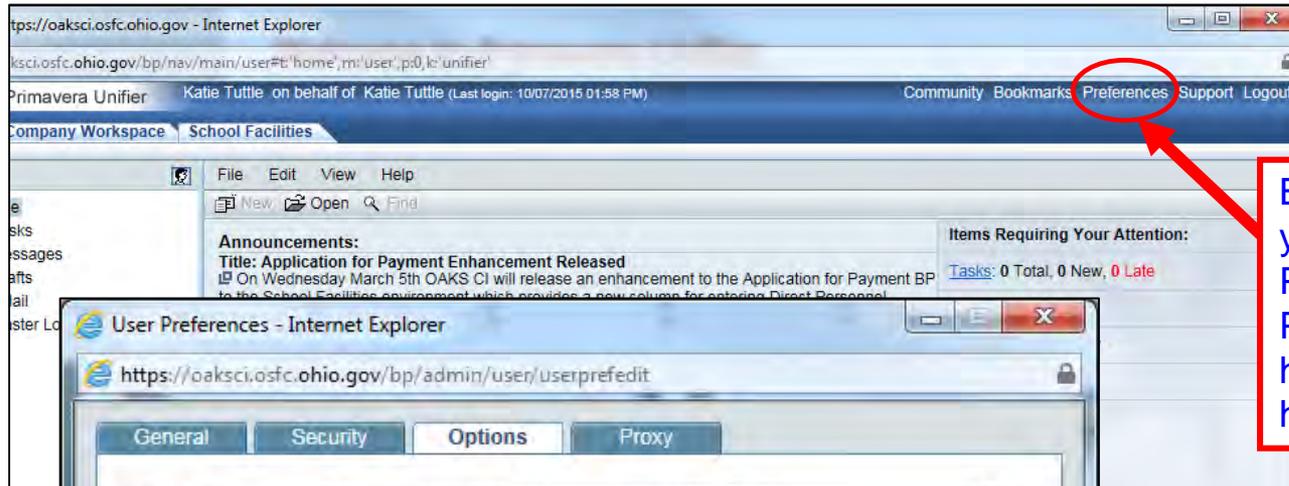
Document Manager

About Document Manager

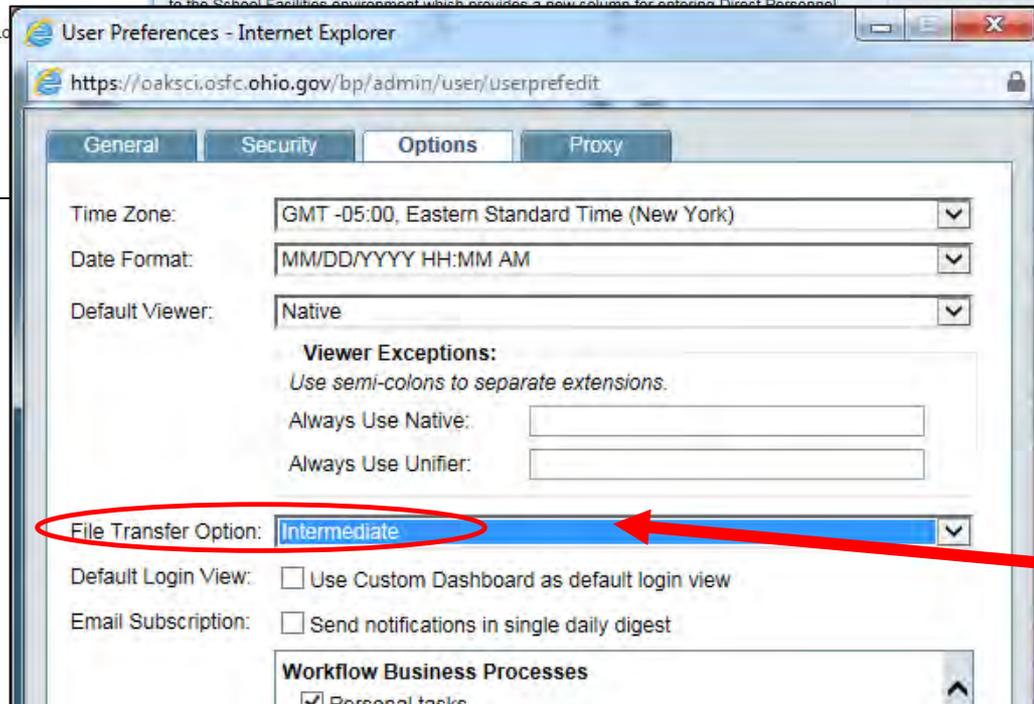
- ▶ Document Manager houses all of your supporting documentation
- ▶ All documents must be uploaded into Document Manager first before they can be attached to a record
- ▶ Provides a platform for maintaining a wide variety of files and documents
- ▶ Ensures that project participants are always working 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



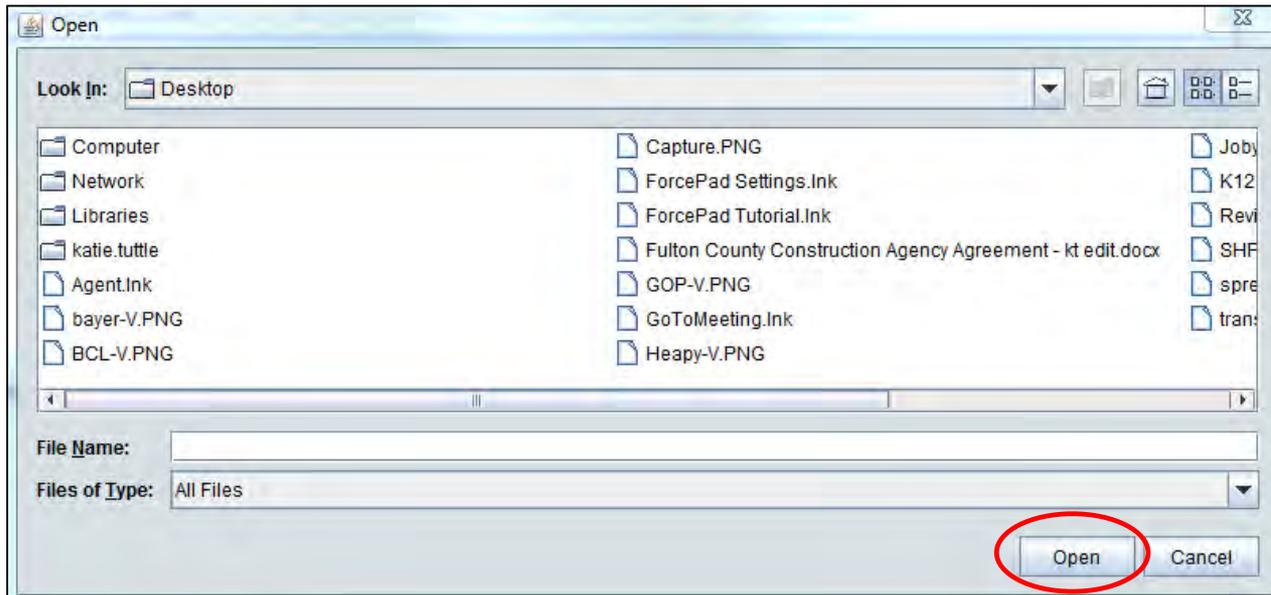
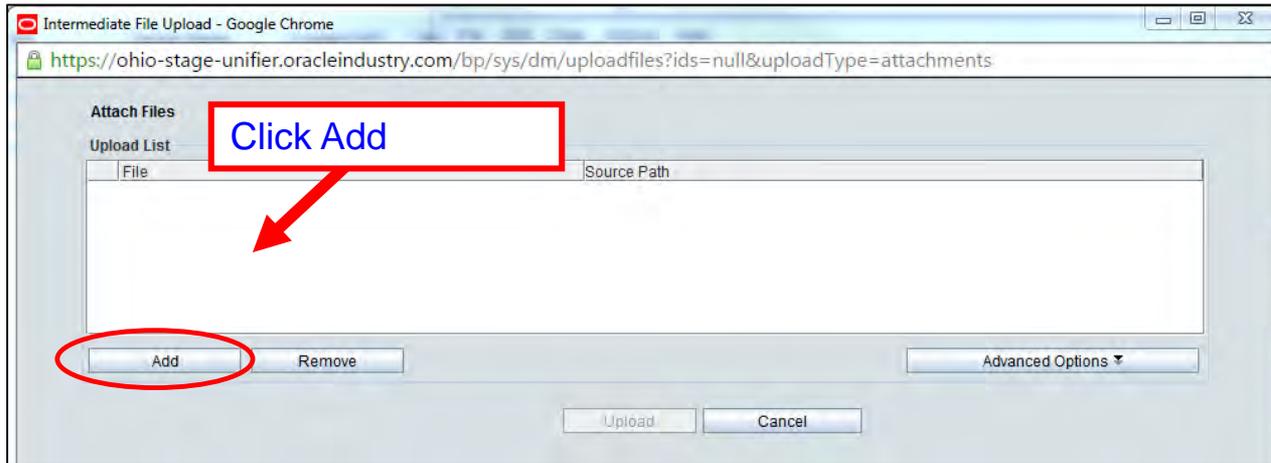
Under the Options Tab, select Intermediate for your File Transfer Option

Document Upload

The screenshot shows the Primavera Unifier web interface. The browser address bar displays 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 box and labeled 'Click Upload'. A red arrow points from this box to the 'Documents' folder in the left navigation pane, which is also highlighted with a red box and labeled '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:

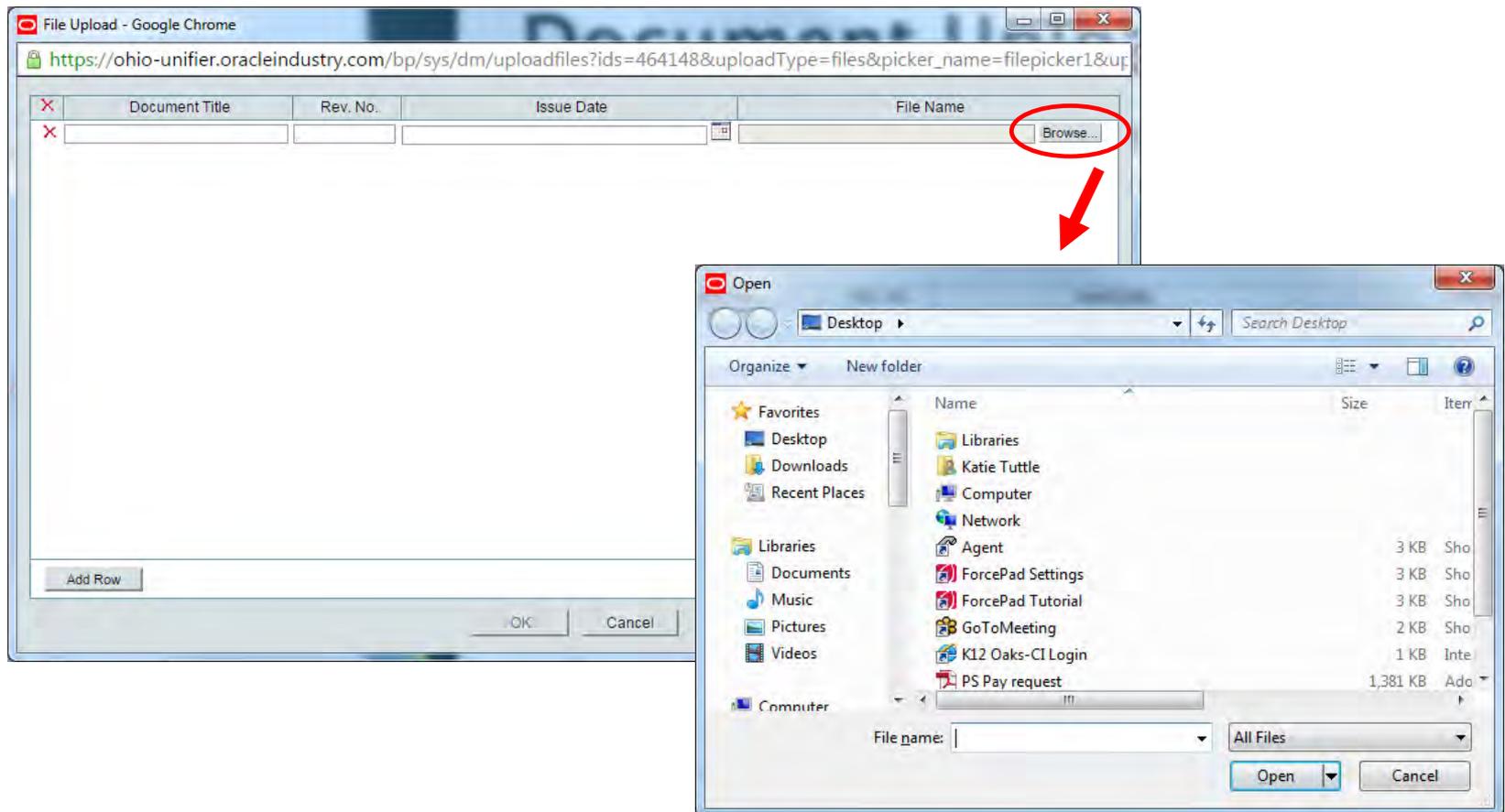
Ref	BP	Name	Size	Upload Date	Owner	Title
		150914 ECM Minutes 27.pc	10 MB	12/28/2015	Liesl McNamee	
		151013 ECM Minutes 28.pc	9 MB	02/08/2016	Liesl McNamee	

A red arrow points to the table with a text box containing the text: "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:

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