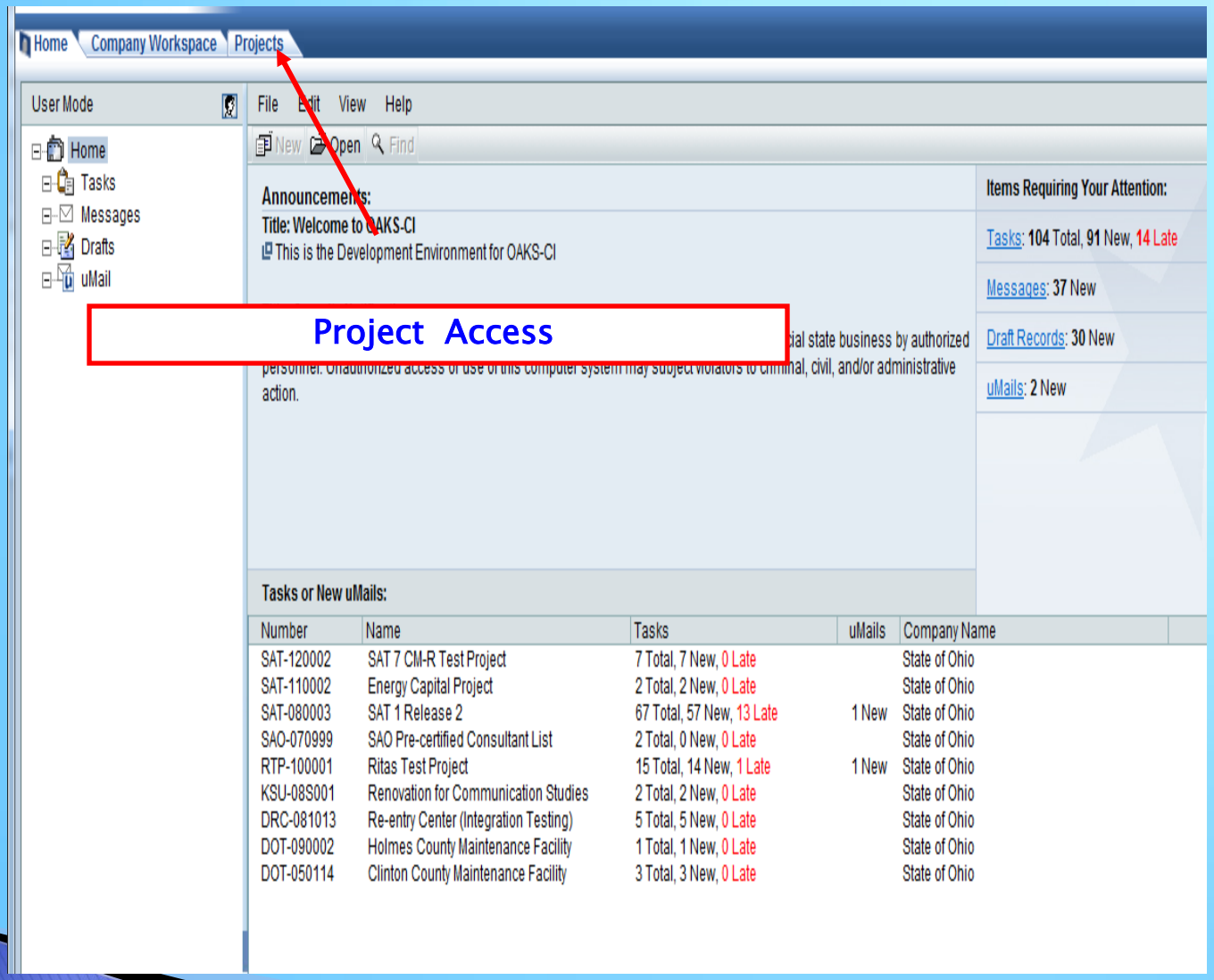
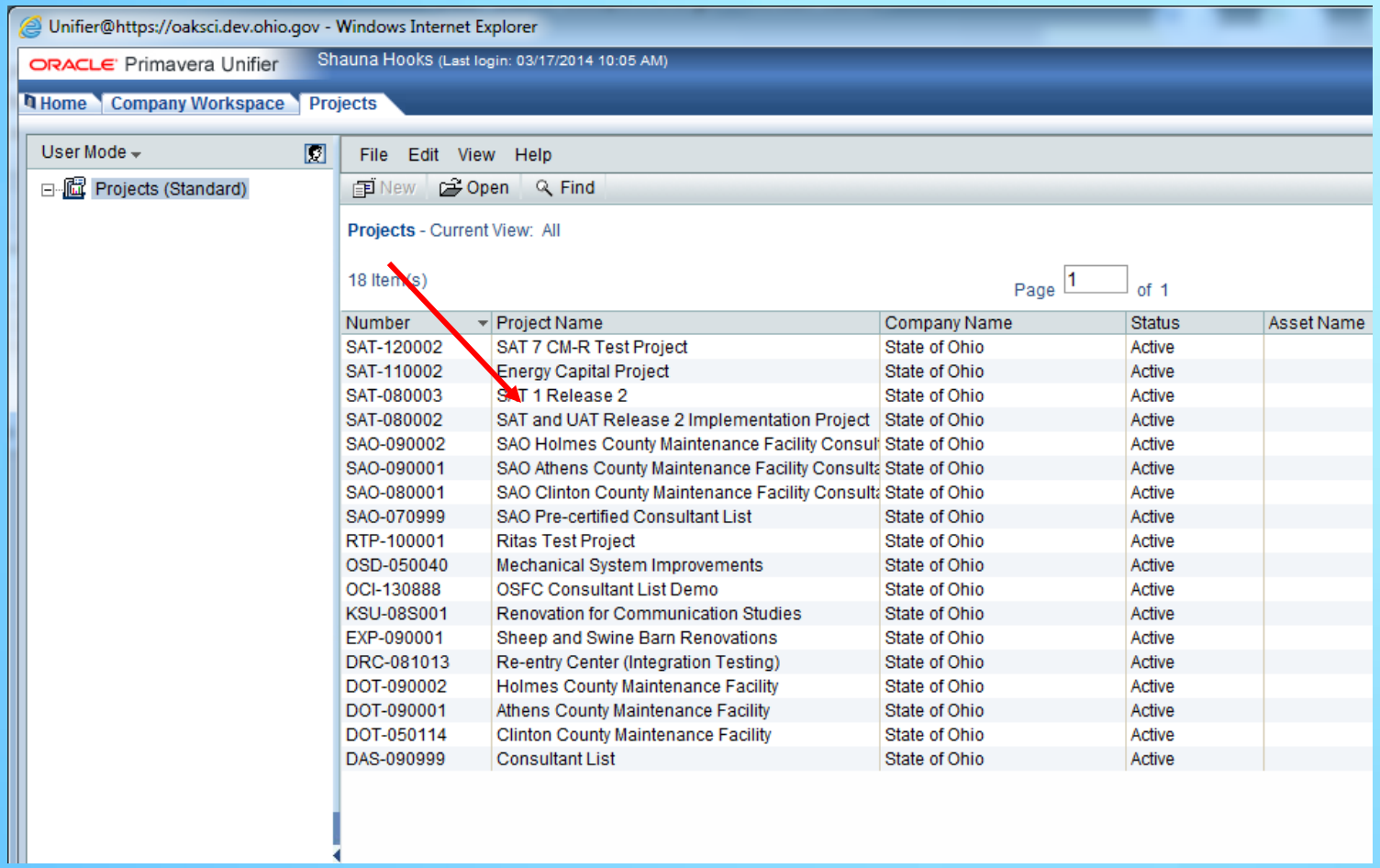
OAKS CI
Capital Improvements (Management System)

Create Contractor Pay Request
Slides 6-10 Uploading to Document Manager
Slides 13-16 Create a Prevailing Wage Record
Slides 16-29 Create Contractor Pay Request

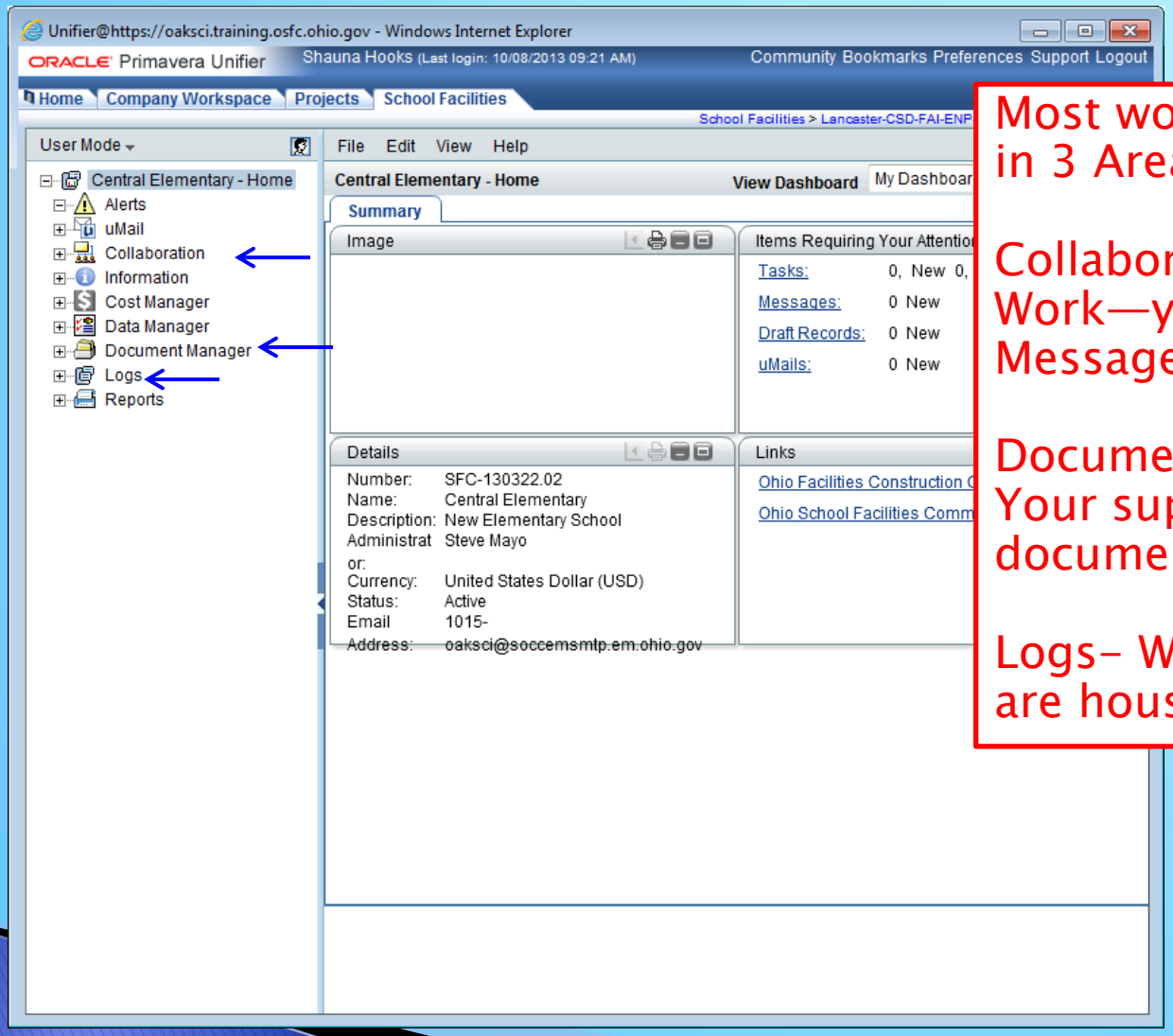
Project Access



Double Click on Project



Project Home Page



Most work is completed in 3 Areas

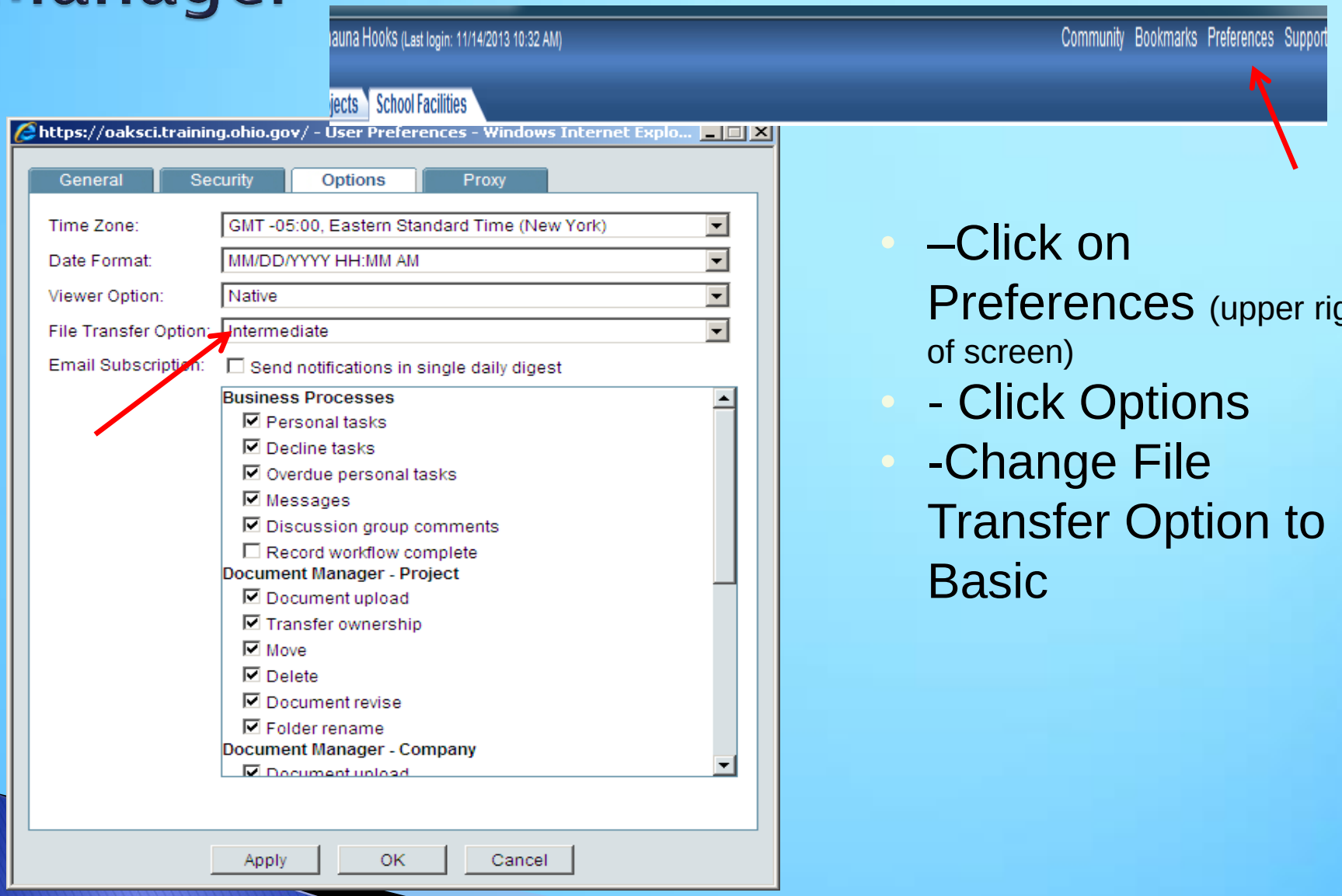
Collaboration—Your Work—your Task's, Messages and Drafts

Document Manager- Your supporting documentation

Logs- Where records are housed and created

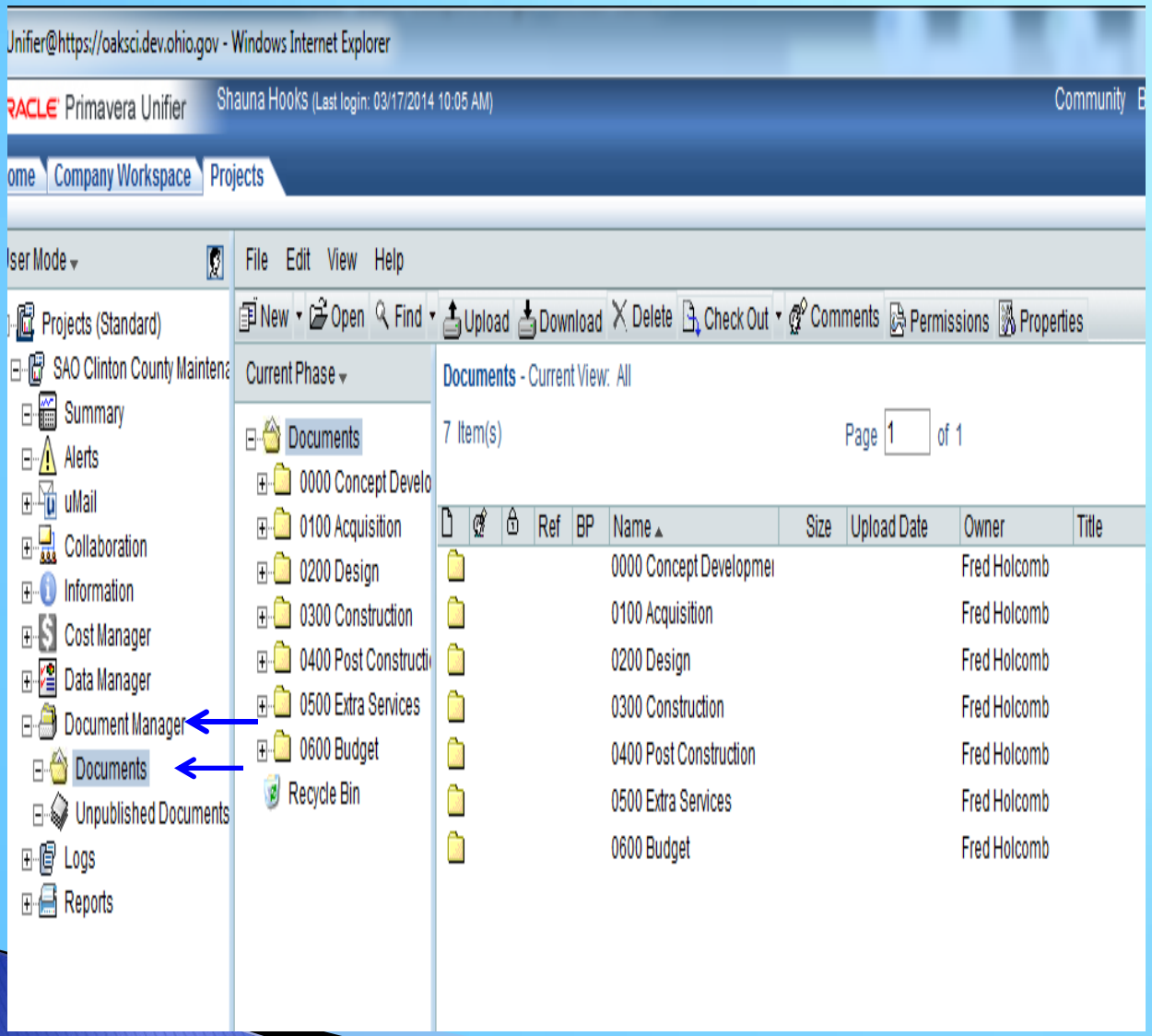
If you have certified payrolls, you must first upload them to document manager prior to creating your Pay Request. Slides 6-10

Before Uploading to Document Manager



- –Click on Preferences (upper right of screen)
- - Click Options
- -Change File Transfer Option to Basic

Project Home Page

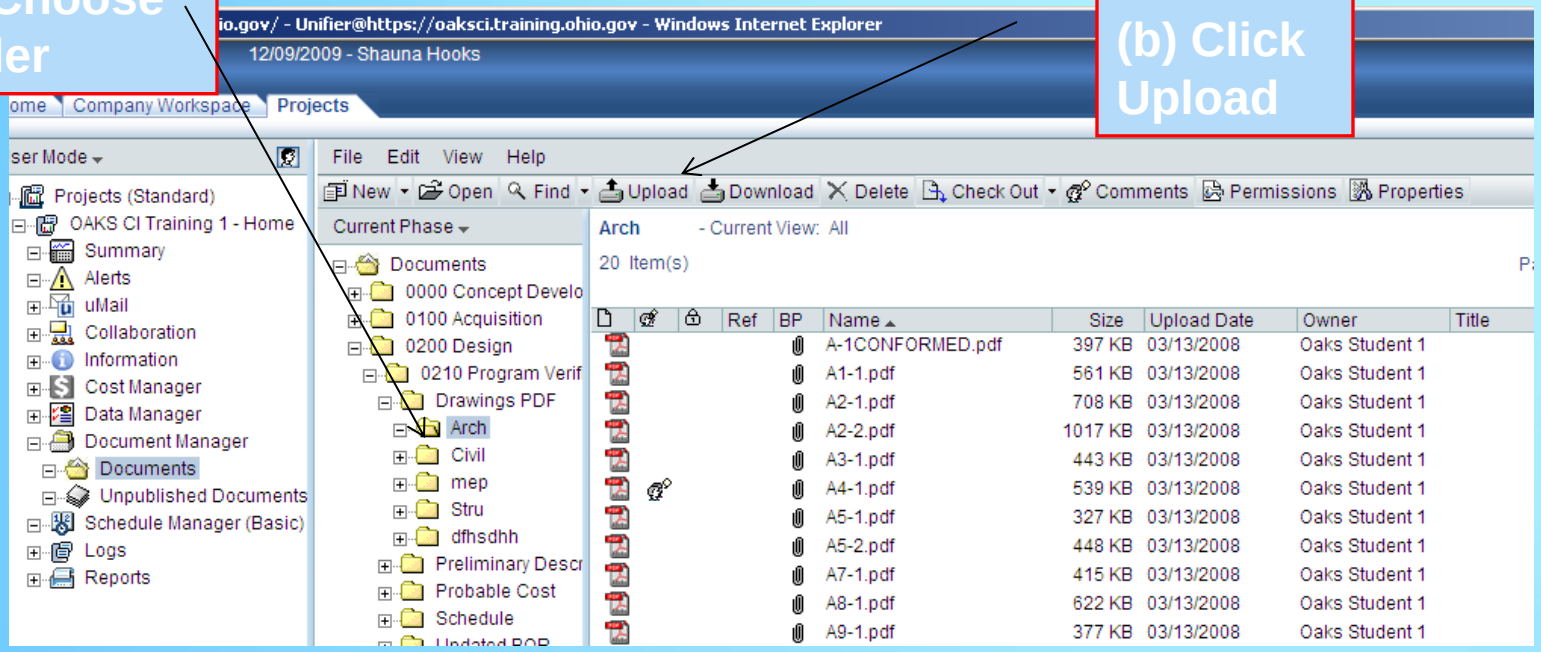


- Click Document Manager
- Documents

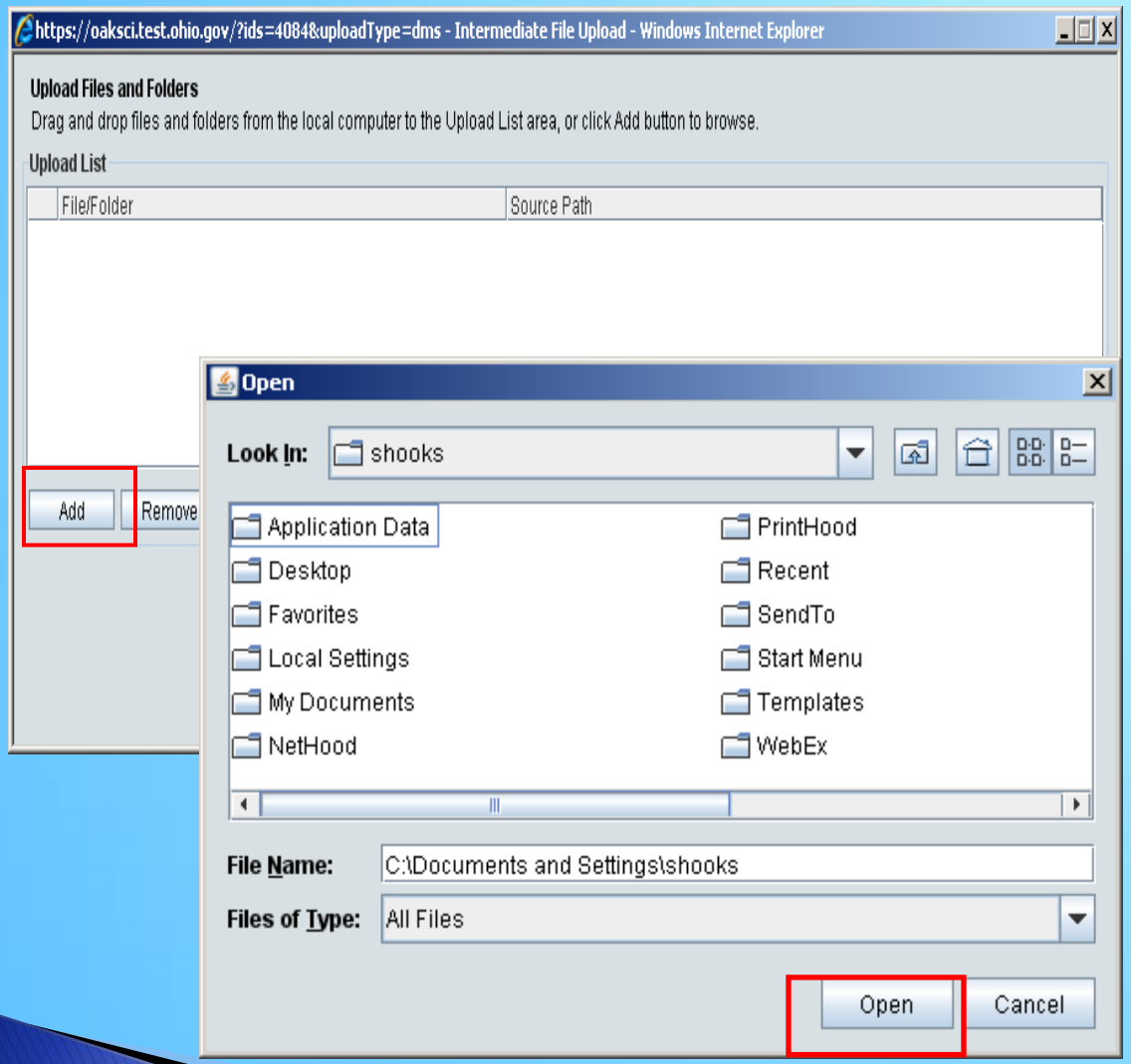
File Upload

(a) Choose folder

(b) Click Upload

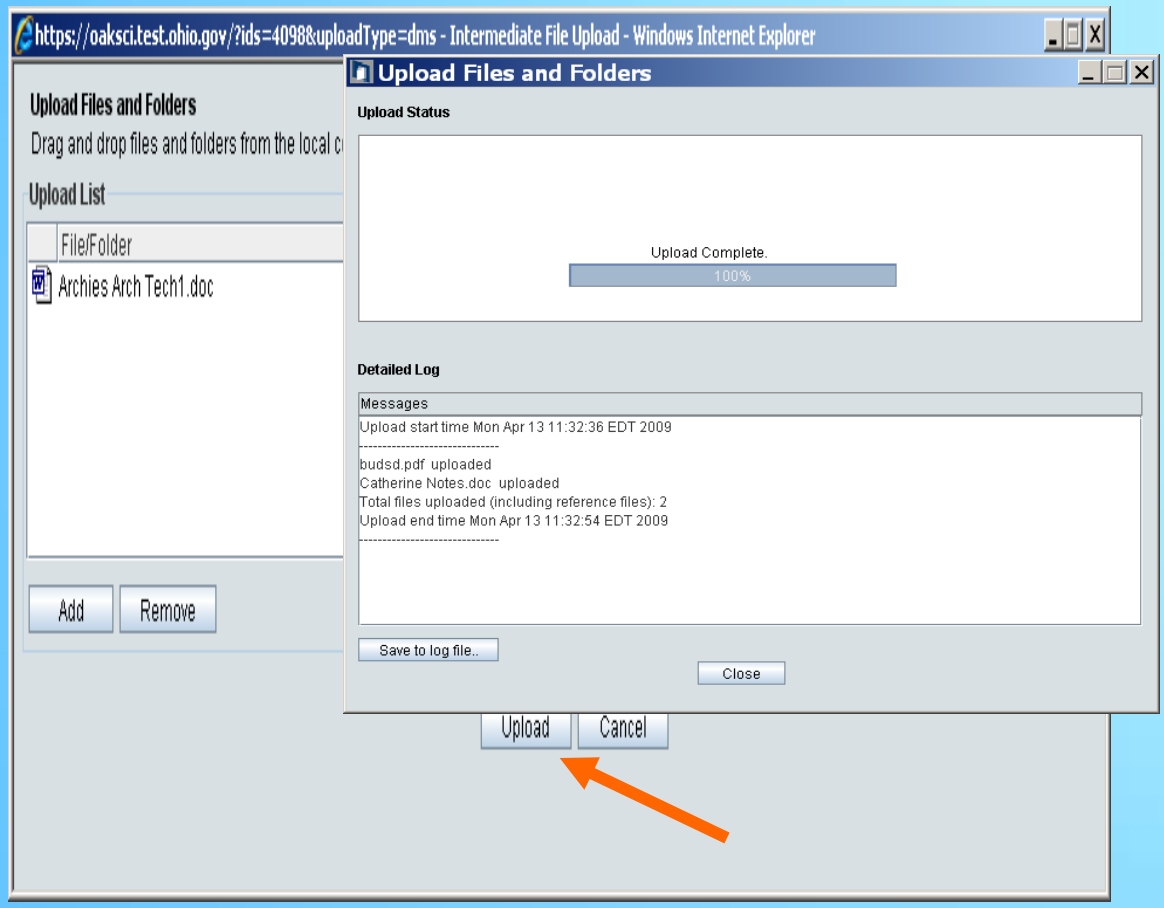


File Upload



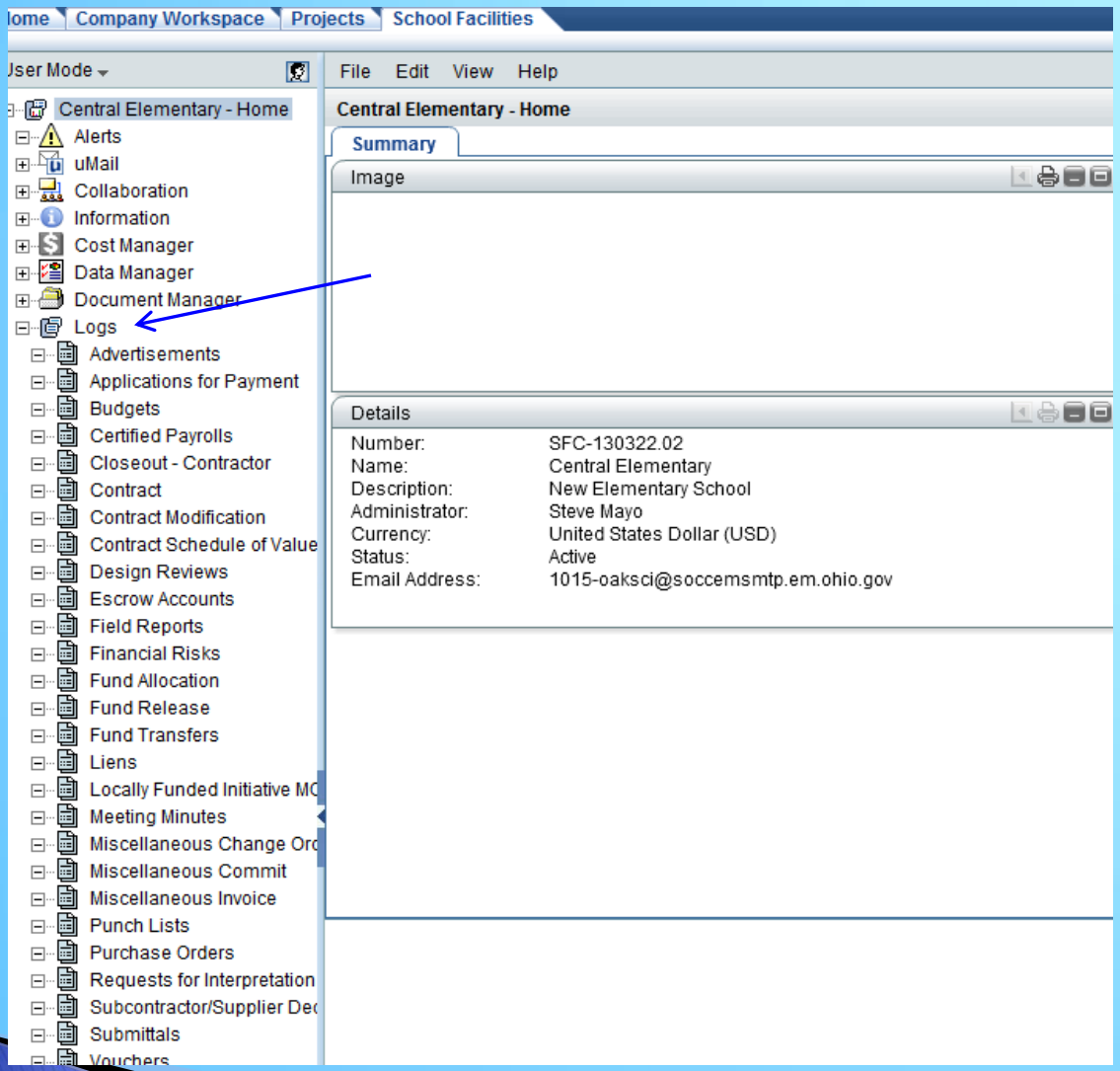
- Click Add
- Choose document or folder to upload
- Click Open

File Upload

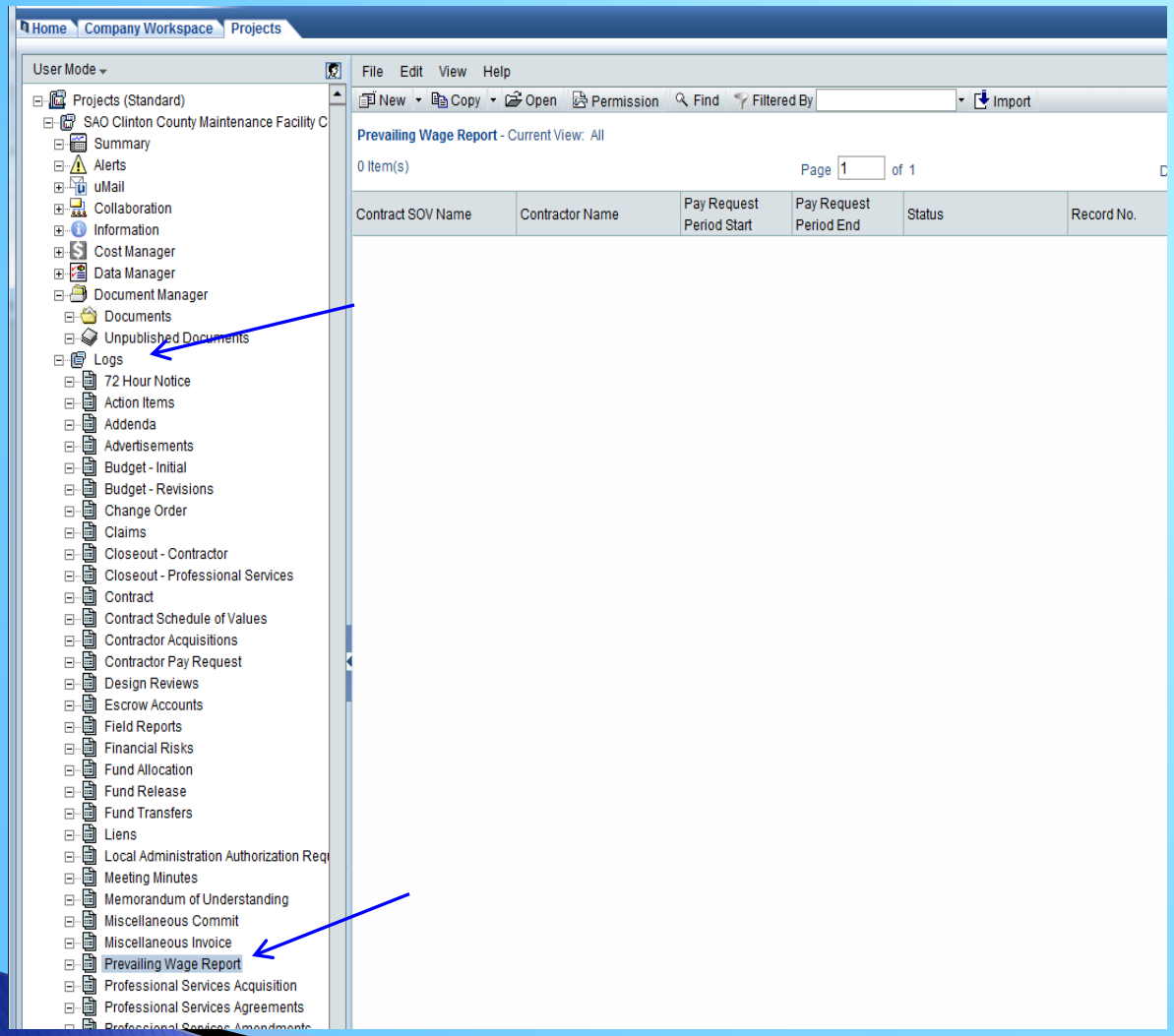


- Document or folder is populated into Upload list
- Click Upload
- Box will pop up indicating the upload is Complete

Create a New Record

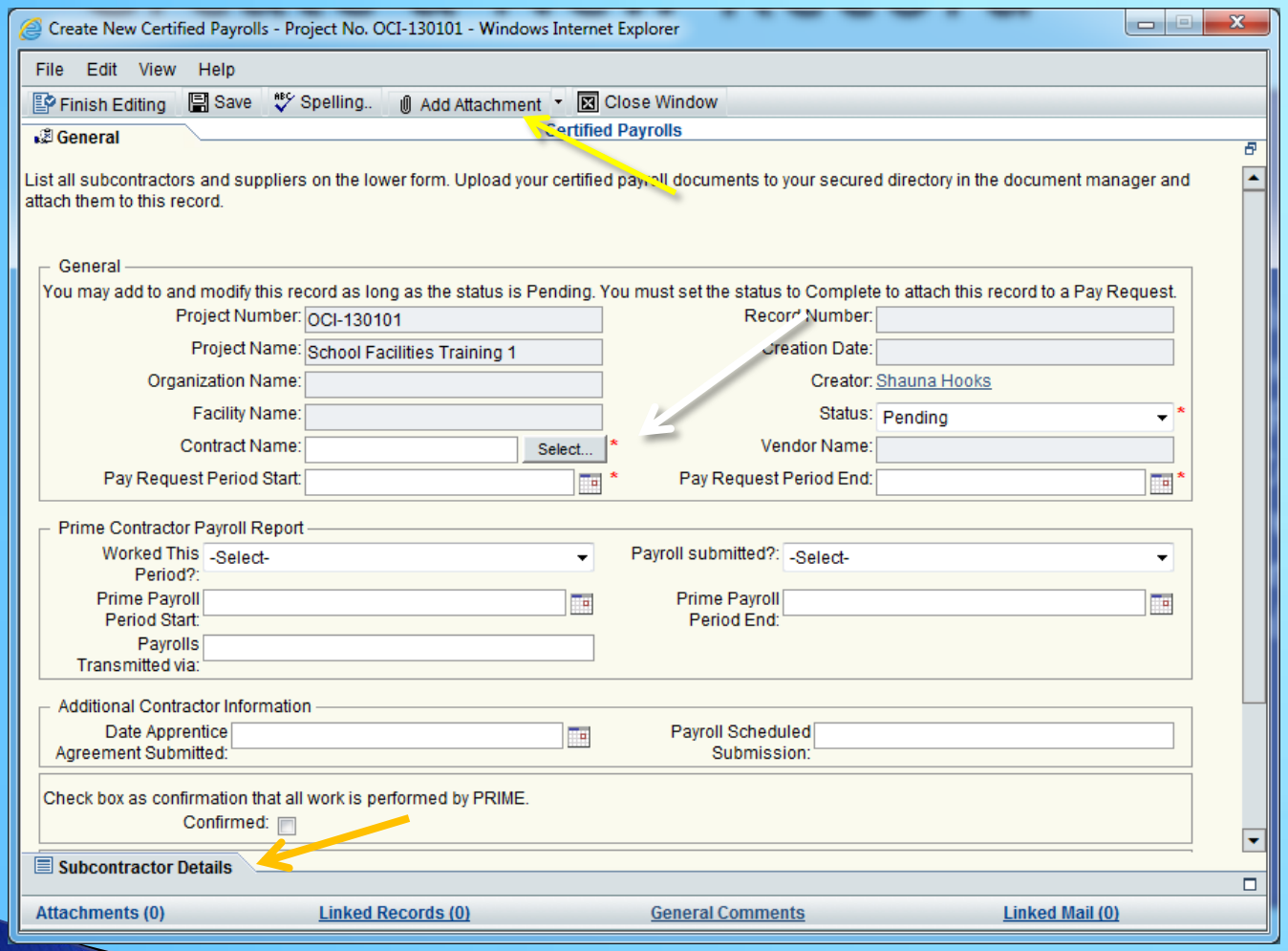


Create a New Record



Note to Contractor:
If you are the Trade Contractor on the project, prior to creating a new Pay Request, a Prevailing Wage Record must be created
Review slides 13-16

Create a Prevailing Wage Report

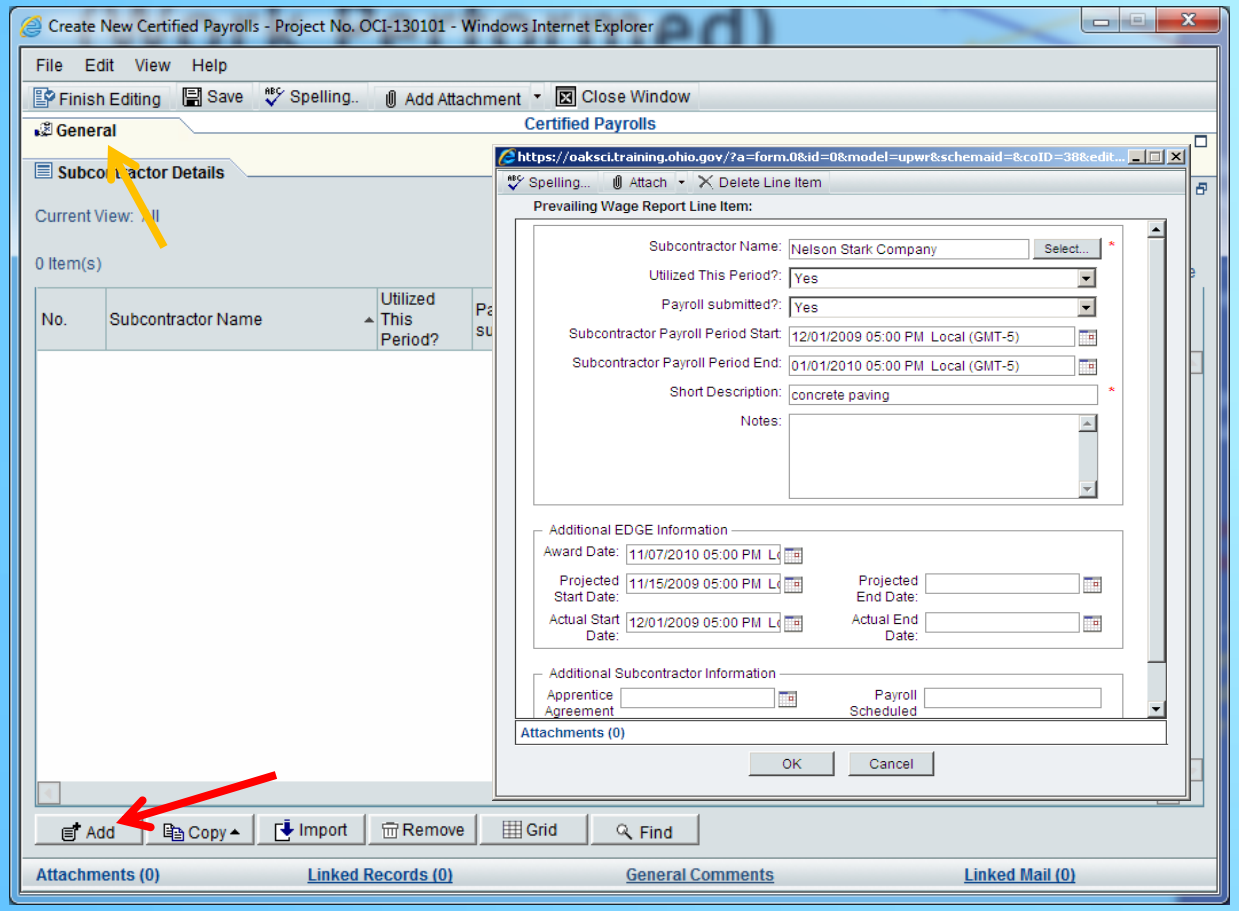


- Complete all applicable areas, every field with an * is mandatory

- Attach supporting documents to record by clicking Add Attachment

- Click Subcontractor Details to add any Subcontractor/Suppliers to be paid this pay period

Create a Certified Payroll report



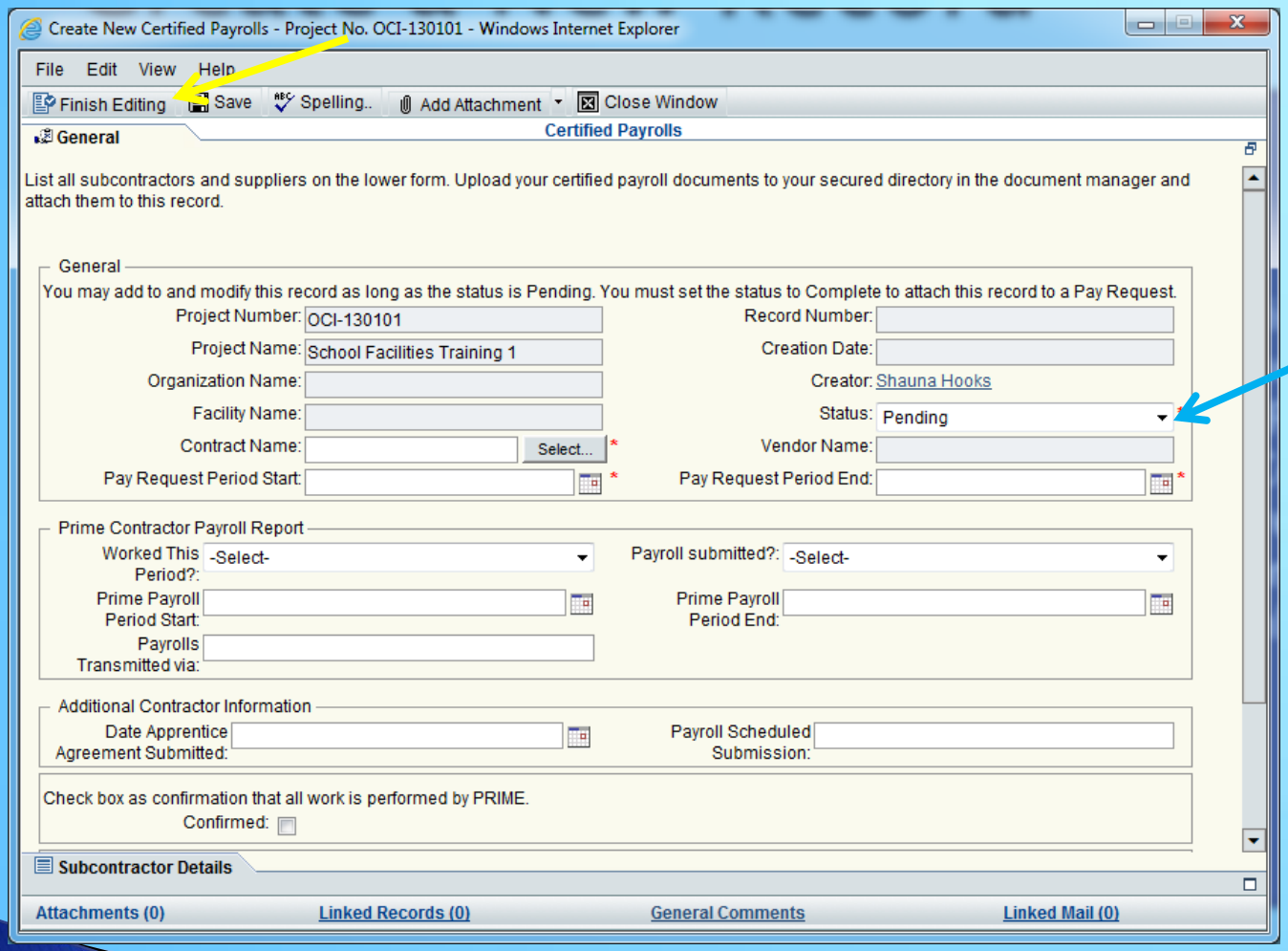
- Click Add

- Fill in information as appropriate

- Add additional lines as necessary

- Click General tab when complete

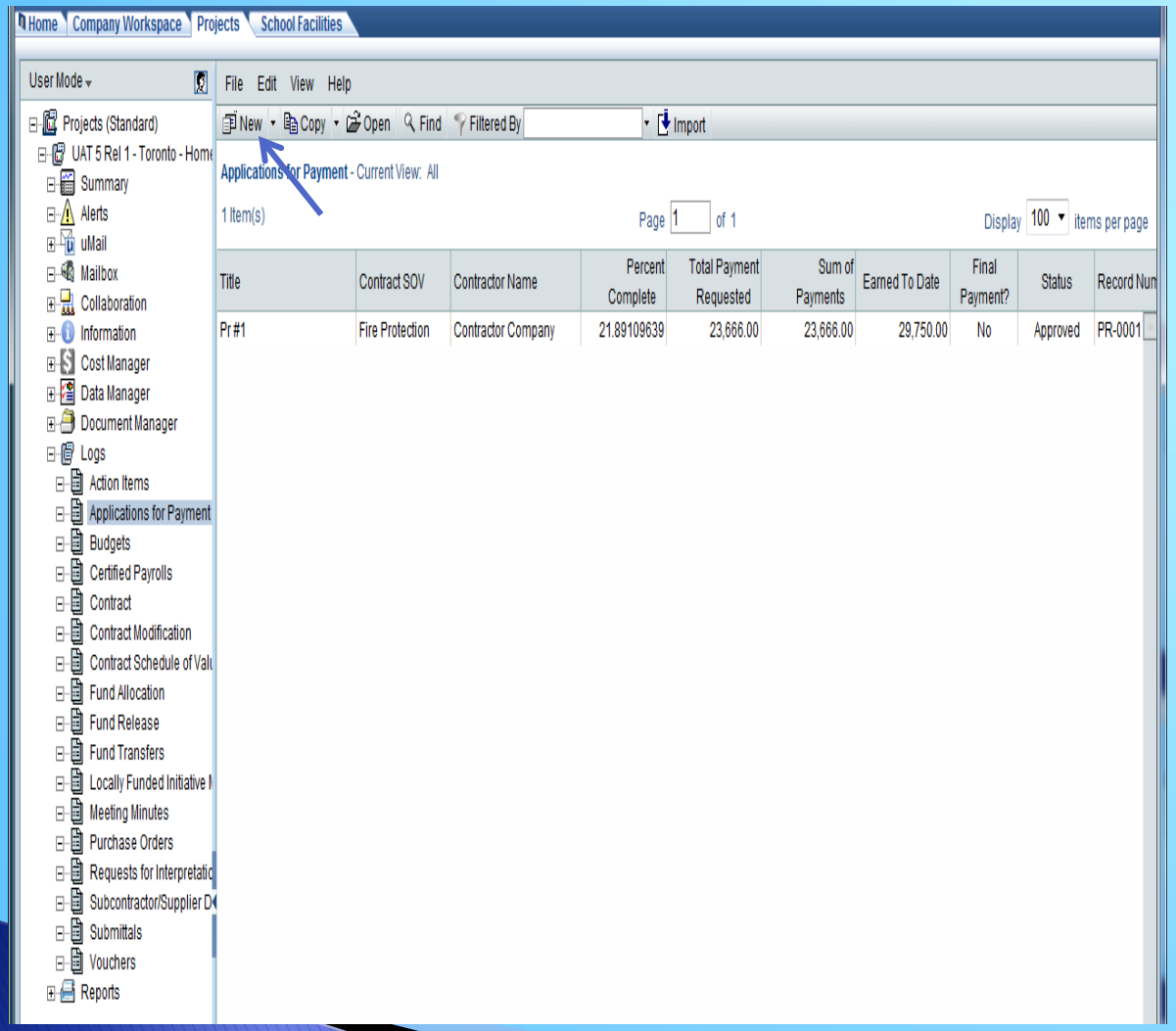
Create a Prevailing Wage Report



-Change the Status to *Complete*

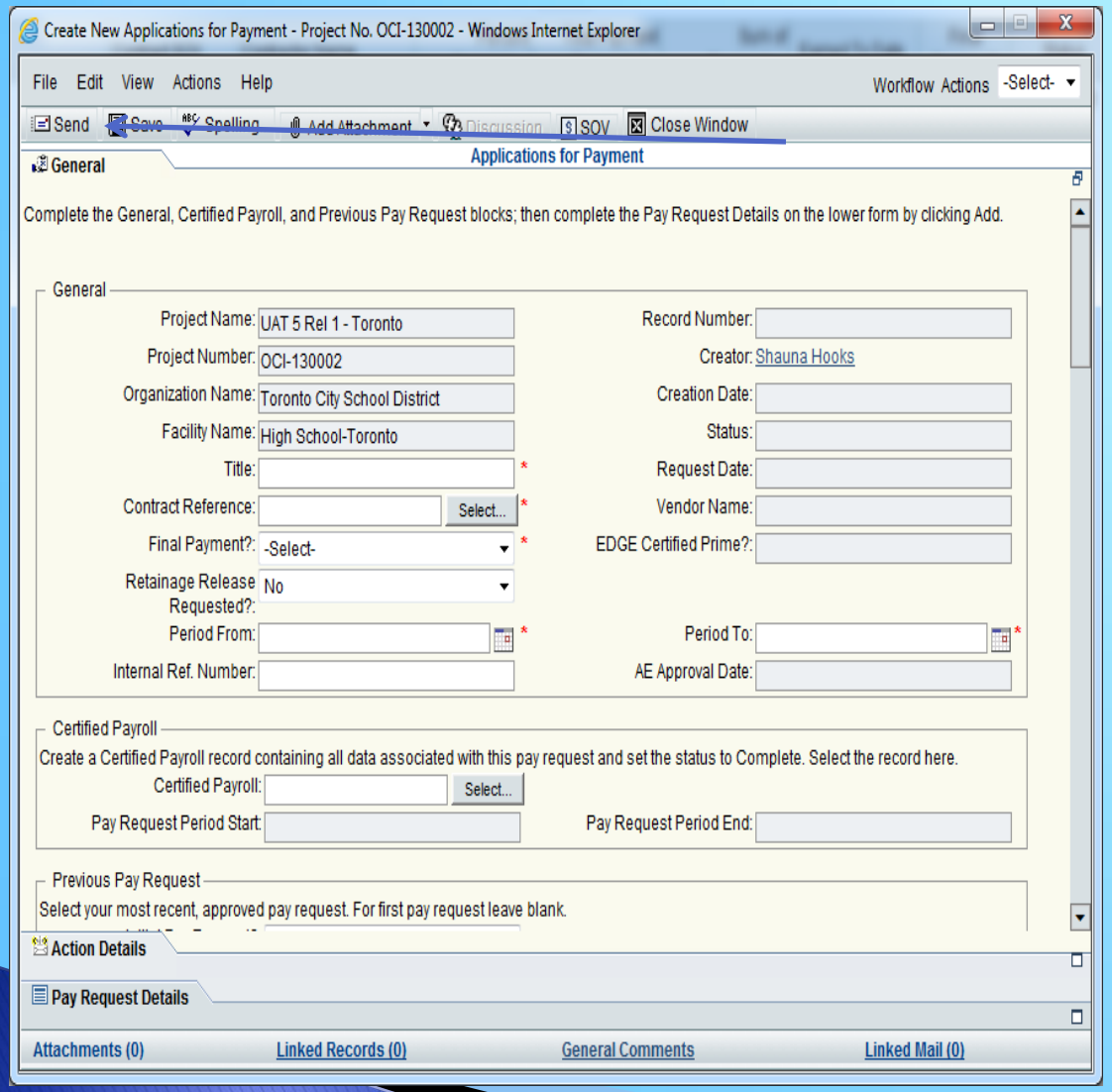
-Click Finish Editing

Create Contractor Pay Request



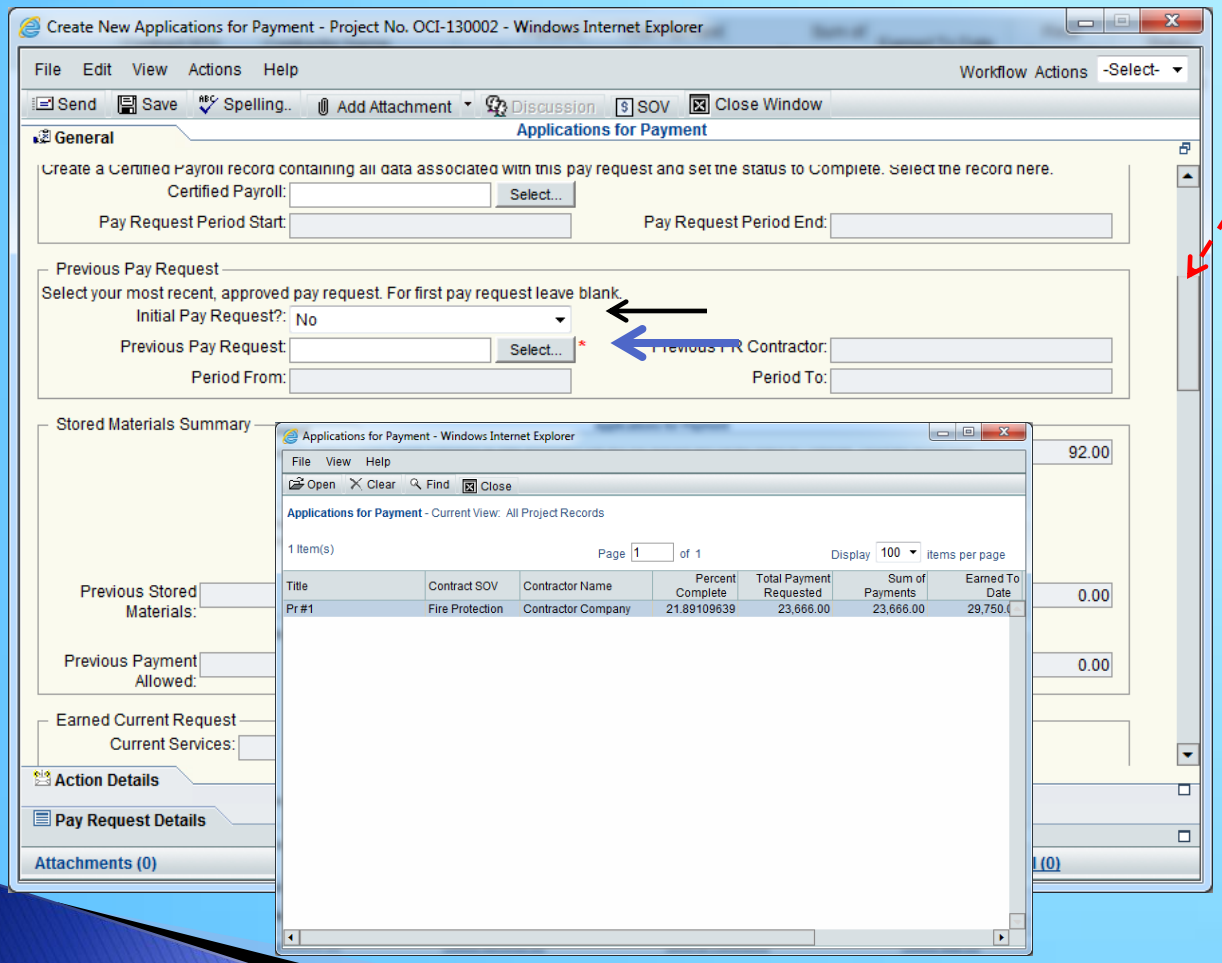
- Click:
  - Logs
  - Contractor Pay Request
  - New

Create Contractor Pay Request



- Click:
  - General Tab
  - Plug in all applicable fields (* fields are mandatory)
  - Click Select next to Certified Payroll, plug in certified payroll record (if applicable)

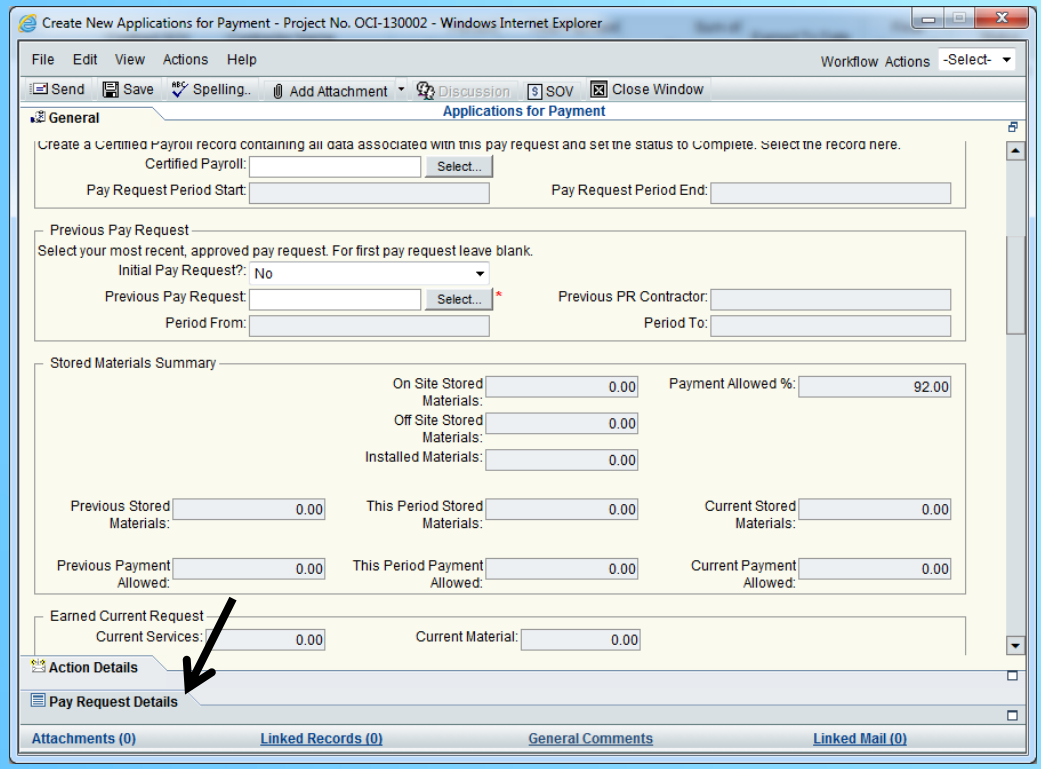
Create Contractor Pay Request



- Click:
  - Scroll down side of page
  - Click arrow down next to: Initial Pay Request? answer Yes/No
  - If No, click Select next to Previous Pay request and select

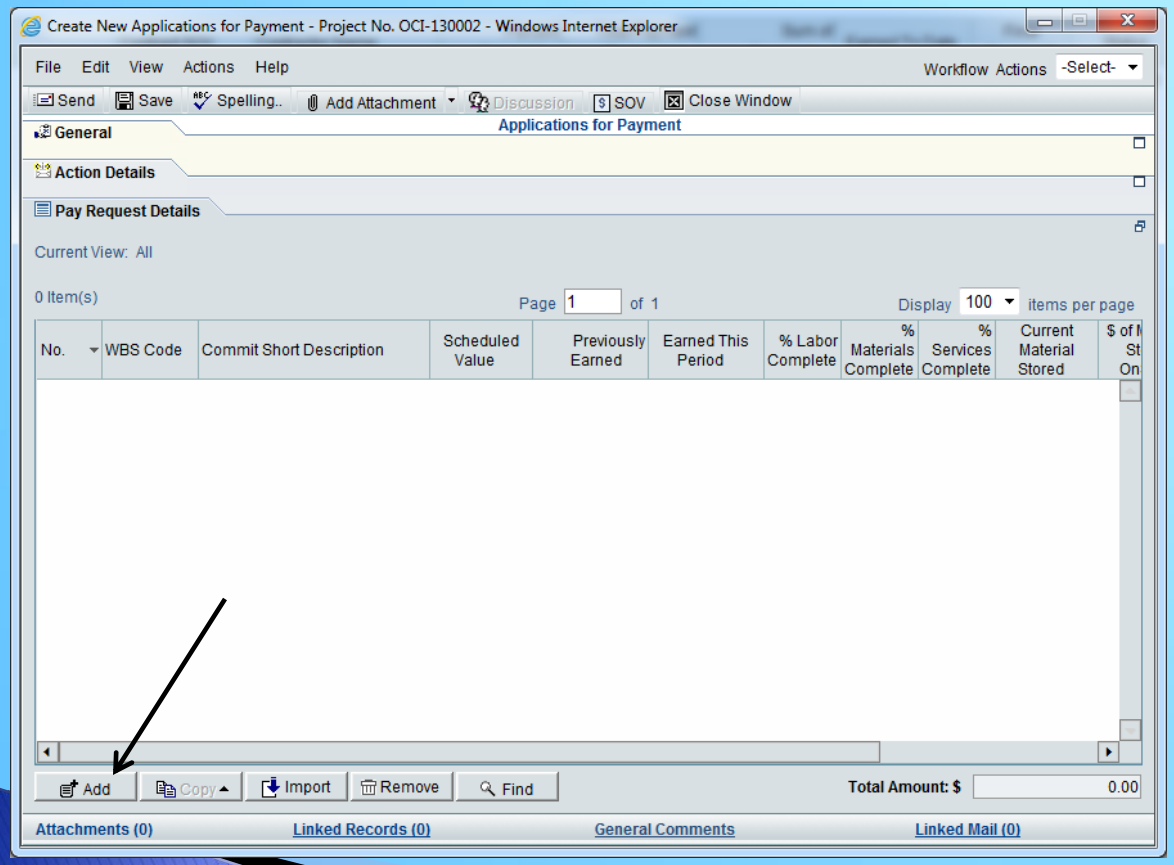
Create Contractor Pay Request

- Click:
  - Pay Request Details tab



Create Contractor Pay Request

- Click:
  - Add

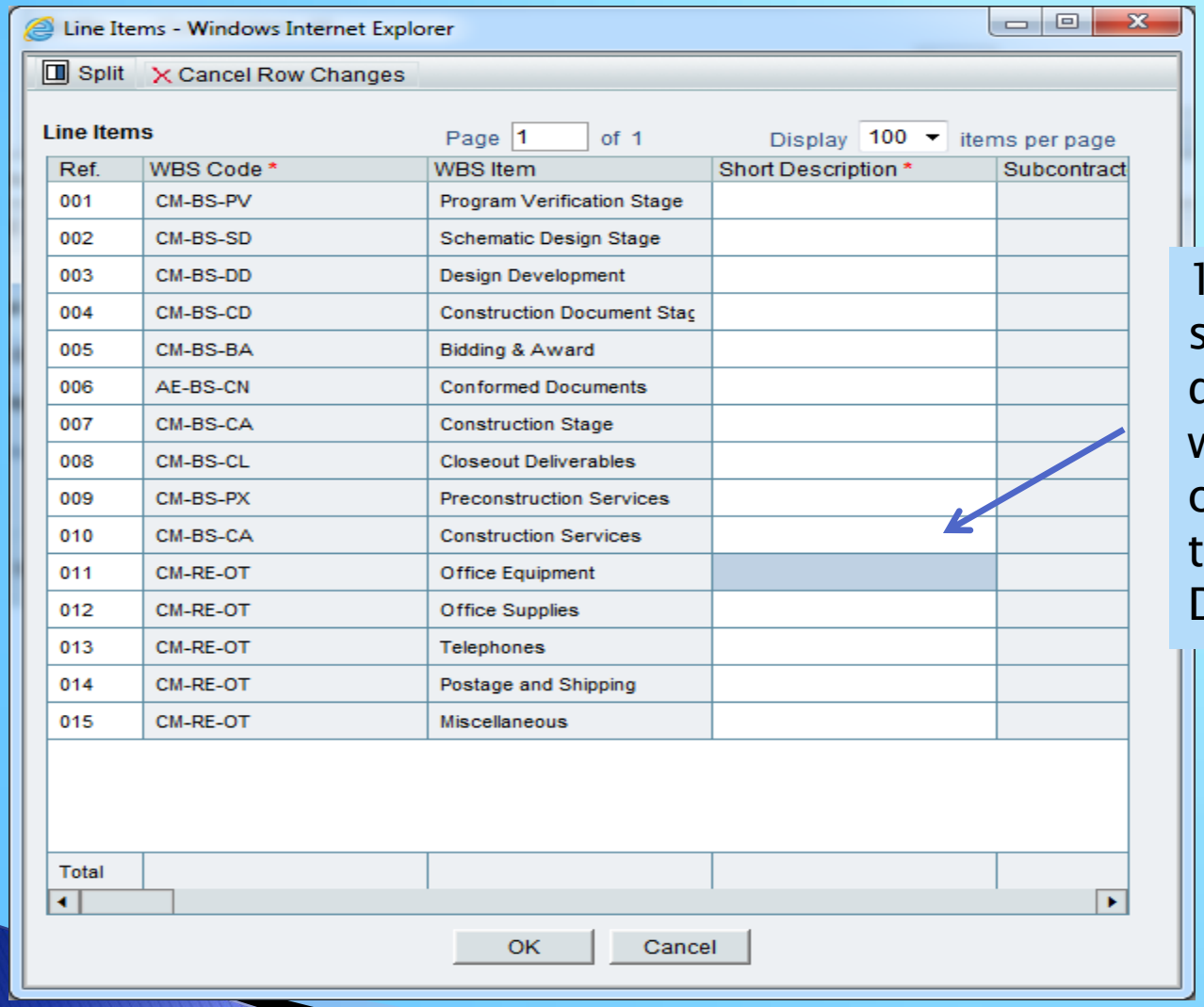


Create Contractor Pay Request

NOTE:

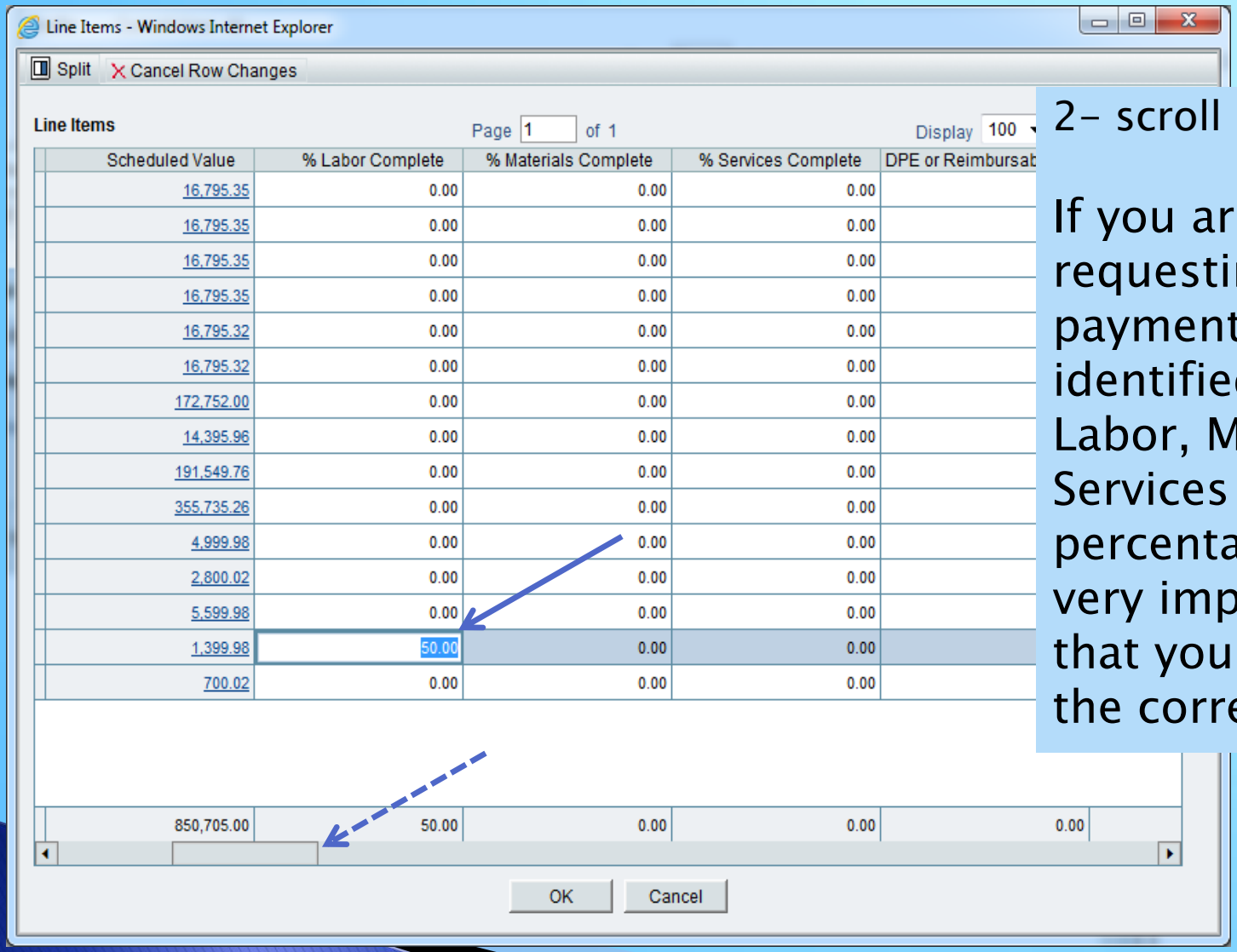
Ensure that the columns you are using are appropriate for the service, labor, material provided. If the line is for DPE or a Reimbursable a dollar value NOT A PERCENTAGE should be plugged in

Create Contractor Pay Request



1 – type in short description of work **or** name of person if the line is for DPE

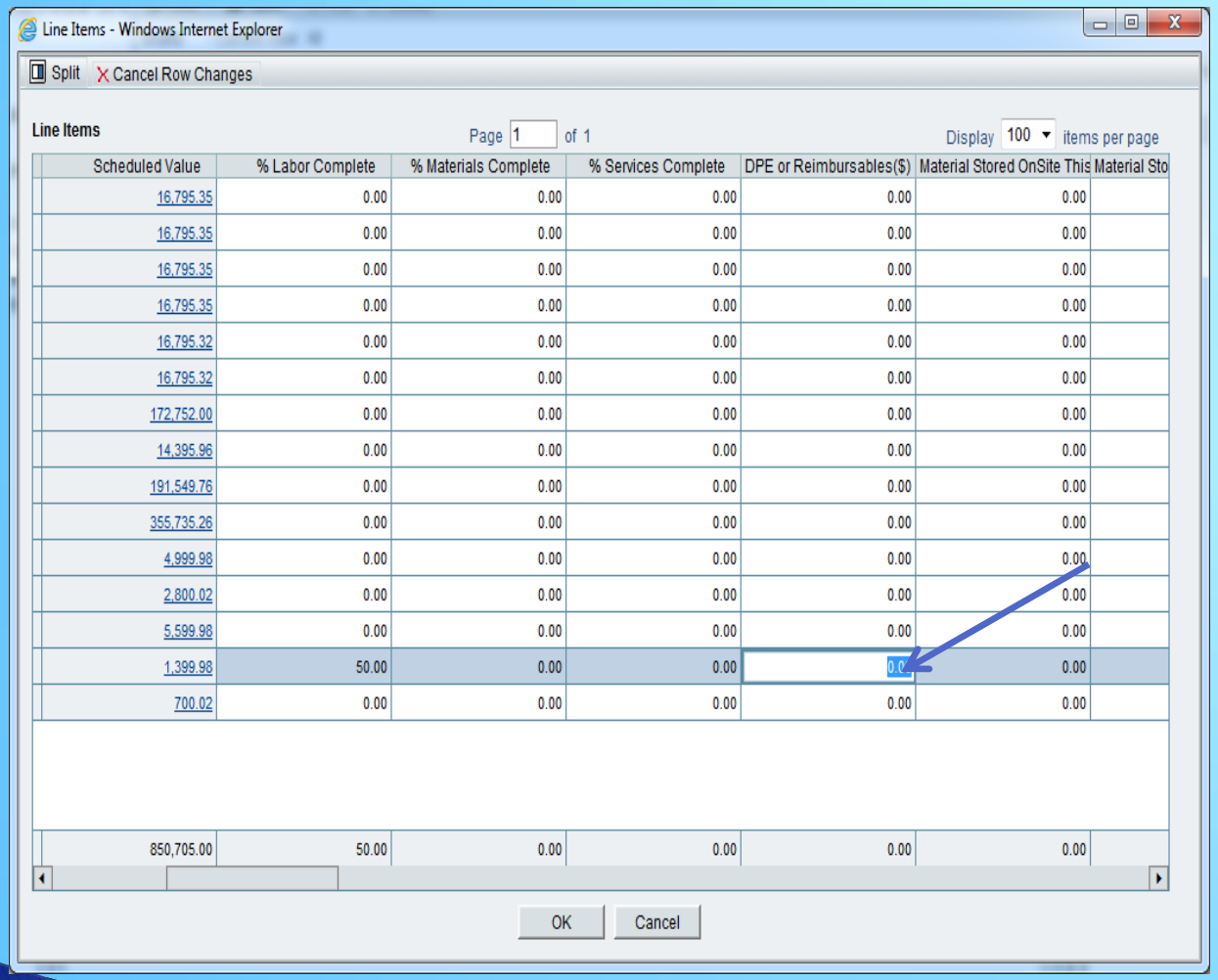
Create Contractor Pay Request



2- scroll right

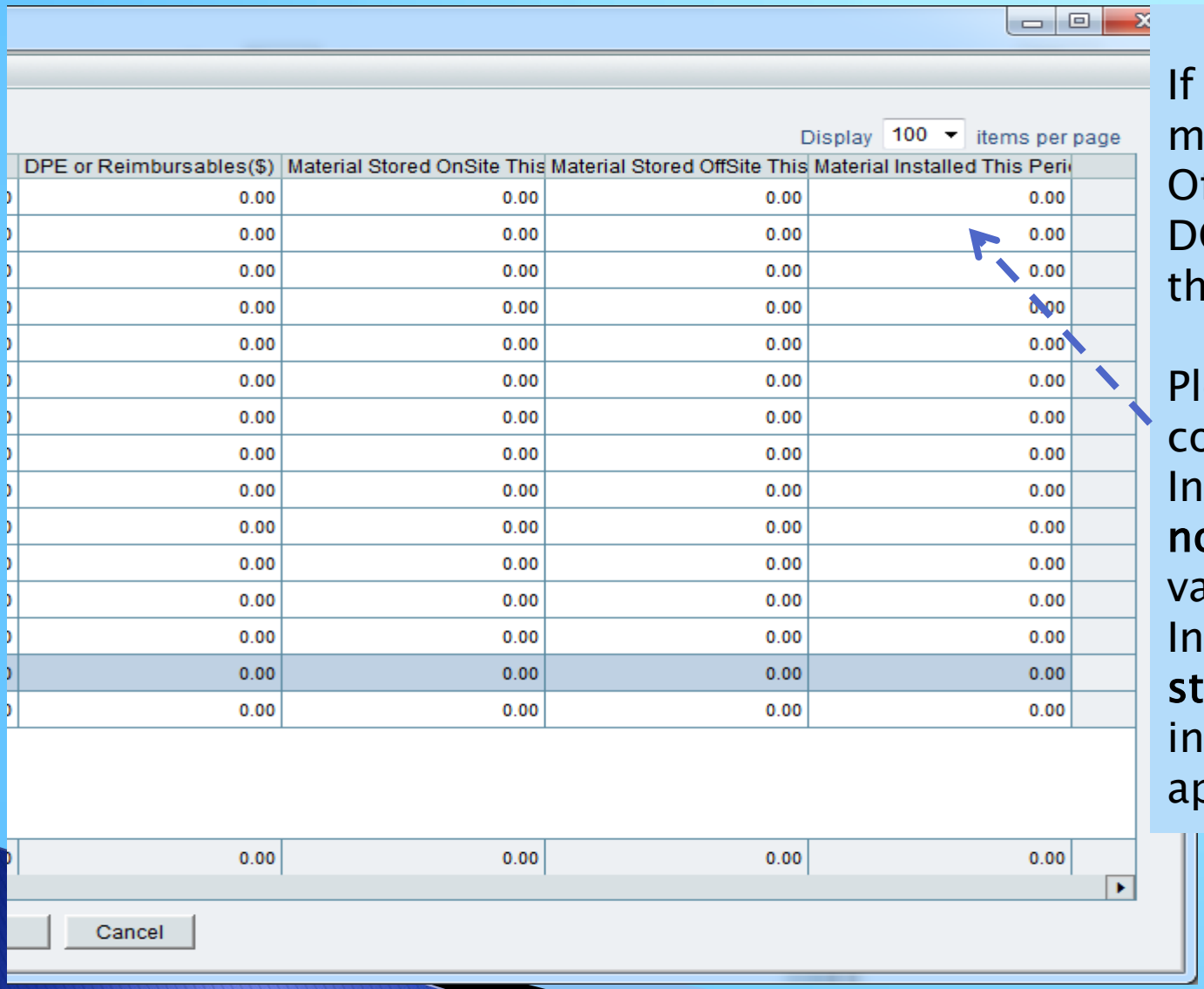
If you are requesting payment for a line identified as Labor, Material or Services type in a percentage, it is very important that you choose the correct column

Create Contractor Pay Request



If you are requesting payment for DPE or Reimbursable you will type a DOLLAR amount in this column ONLY , do not plug in any other dollars or percentages

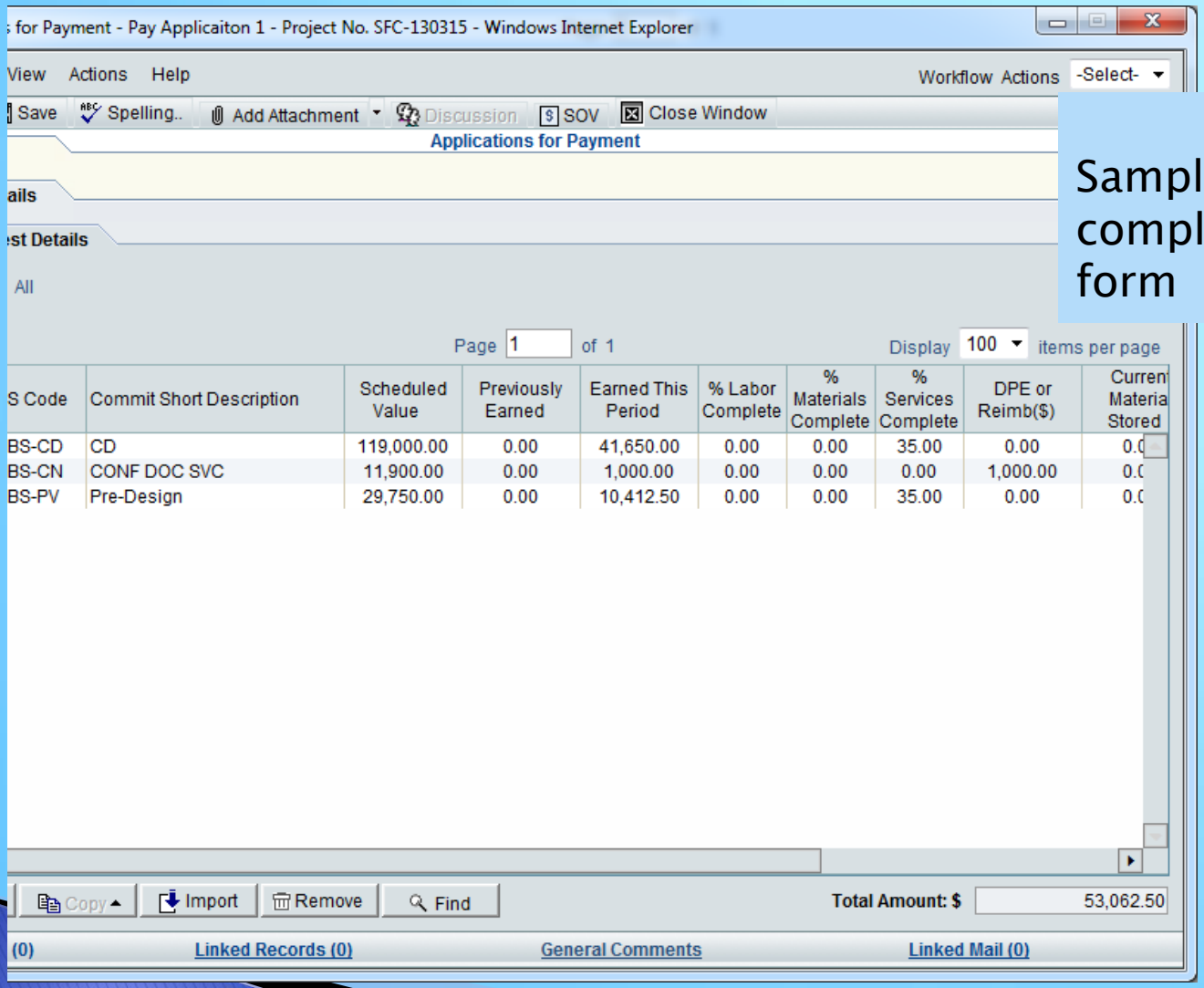
Create Contractor Pay Request



If you have stored material Onsite or Offsite, type in a DOLLAR AMOUNT of the stored material

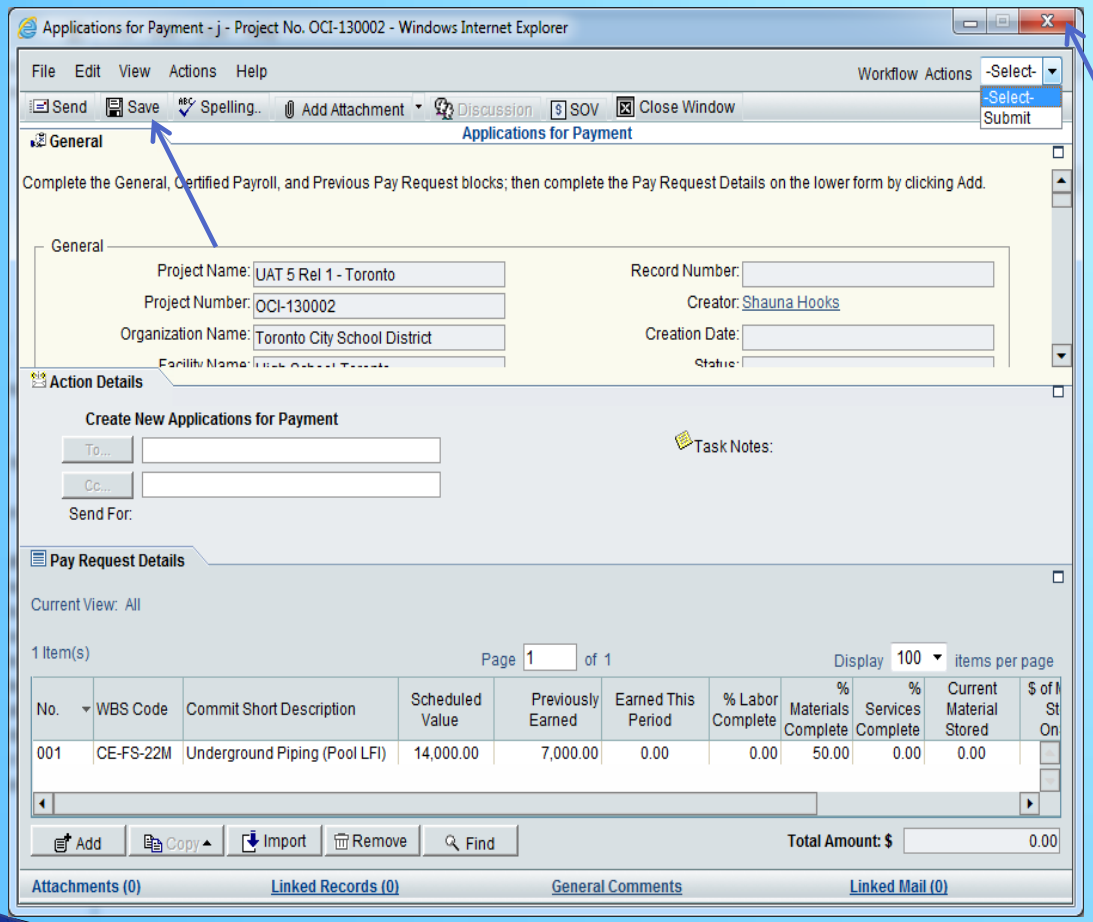
Please note the column for Material Installed, you will **not** type in a dollar value for Material Installed **unless** you **stored** that Material in a previous pay application

Create Contractor Pay Request



Sample of a completed lower form

Create Contractor Pay Request



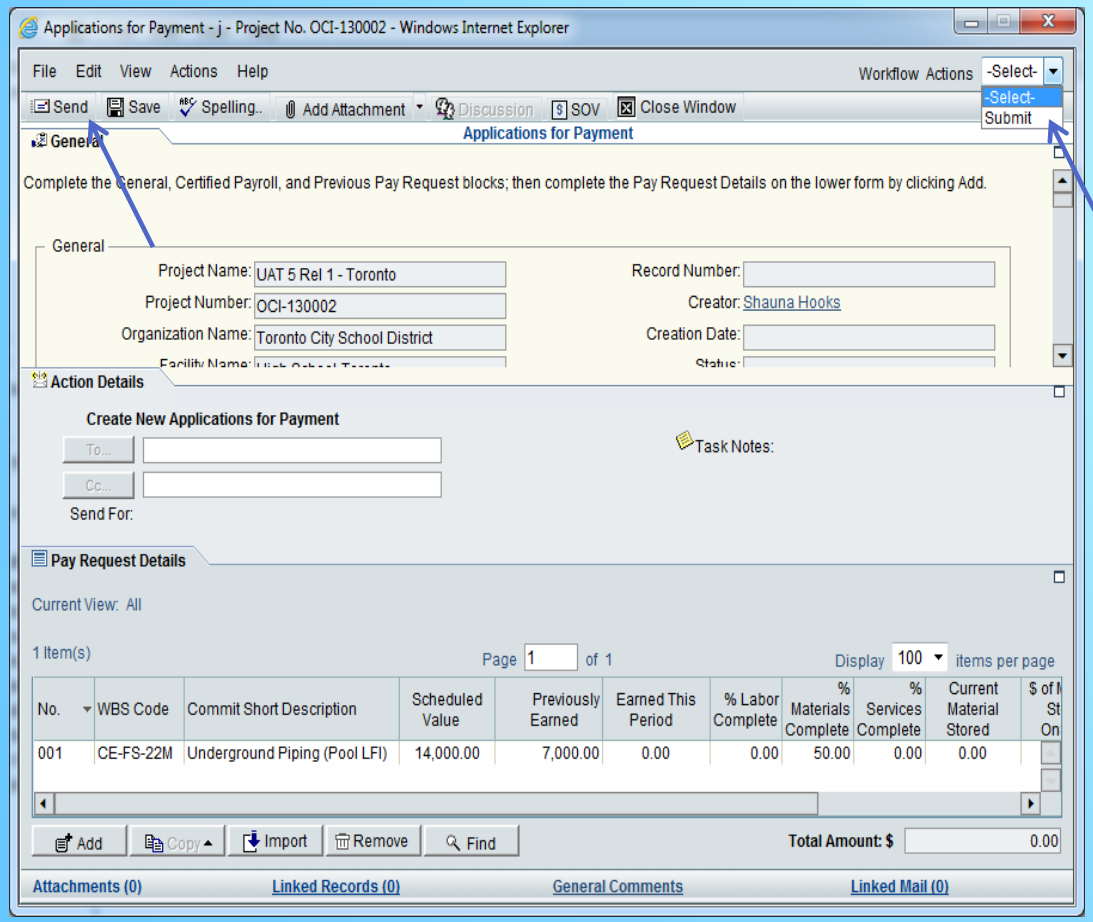
- To Save record:
  - Click Save
  - and Close
  - When you are ready to retrieve your application for payment:

Log into your Project

>Click Collaboration

>Click Drafts (view page 5)

Create Contractor Pay Request



- Once Complete:
  - Choose Workflow action in upper right hand corner
  - Click Send in upper left hand corner

Create Contractor Pay Request

IMPORTANT NOTICE:

- There has been an issue with saved pay applications disappearing from Drafts. Our advice to you is once you have completed the application submit it to the A/E and have them return it to you, this will help you avoid losing the data. We are currently working with ORACLE to resolve this issue.