

OAKS CI

Capital Improvements (Management System)

Creating Work Assignments

Log into OAKS CI

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

ORACLE Primavera Unifier Shauna Hooks (Last login: 08/16/2013 03:07 PM) Community Bookmarks Preferences Support Logout

Home Company Workspace Projects

User Mode File Edit View Help

New Open Find

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: 1169 Total, 967 New, 504 Late](#)

[Messages: 45 New](#)

[Draft Records: 315 New](#)

[uMails: 26 New](#)

Tasks or New uMails:

Number	Name	Tasks	uMails	Company Name
WSU Test Proj	Wright State Test Project	1 Total, 1 New, 0 Late		State of Ohio
UCN-120001	UC Training	9 Total, 6 New, 0 Late		State of Ohio
SFC-130888	OFCC Specialty Consultant List	1 Total, 0 New, 0 Late		State of Ohio
OCI-120001	Agency General Functional Training	22 Total, 20 New, 18 Late	1 New	State of Ohio
OCI-100001	SAO Consultant List	322 Total, 310 New, 0 Late	3 New	State of Ohio
OCI-090003	OAKS CI Training 3	5 Total, 2 New, 0 Late		State of Ohio
OCI-090002	KSU Projects Test	4 Total, 4 New, 1 Late		State of Ohio
OCI-090001	Agency General Projects Test	1 Total, 1 New, 1 Late		State of Ohio
OCI-080002	OAKS CI Training 2	363 Total, 272 New, 173 Late	8 New	State of Ohio
OCI-080001	OAKS CI Training 1	390 Total, 302 New, 277 Late	13 New	State of Ohio
MUN-100001	Miami University Training Project	35 Total, 34 New, 27 Late		State of Ohio
CLS-110001	Cleveland State Training Project	16 Total, 15 New, 7 Late	1 New	State of Ohio

Cross Project Home Page

Click the Cross project's tab

Home Company Workspace **Projects**

User Mode File Edit View Help

New Open Find

Home
Tasks
Messages
Drafts
uMail

Announcements:
Title: Sun Java Issue
Please be aware that the highest version of Sun Java that is currently supported by Skire Unifier is version 1.6.7. Sun has recently released a new version that is currently not supported and will result in an error when you try to upload or download documents. We will post a notification on this site when later versions can be used.

Title: Security Notification
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 and/or administrative action

Items Requiring Your Attention:
[Tasks: 285 Total, 263 New, 18 Late](#)
[Messages: 16 New](#)
[Draft Records: 52 New](#)
[uMails: 11 New](#)

Tasks or New uMails:

Number	Name	Tasks	uMails	Company Name
OCI-100001	SAO Consultant List	249 Total, 242 New, 0 Late	2 New	State of Ohio
OCI-080002	OAKS CI Training 2	10 Total, 5 New, 3 Late	5 New	State of Ohio
OCI-080001	OAKS CI Training 1	26 Total, 16 New, 15 Late	4 New	State of Ohio

Project's Tab

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

Skire™ Unifier™ 09/25/2009 - Shauna Hooks

Home Company Workspace **Projects**

User Mode ▾

Projects (Standard)

File Edit View Help

New Open Find

Projects - Current View: All

6 Item(s)

Number ▾	Project Name	Company Name
OCI-100001	SAO Consultant List	State of Ohio
OCI-090002	KSU Projects Test	State of Ohio
OCI-090001	Agency General Projects Test	State of Ohio
OCI-090000	Training Documents Project	State of Ohio
OCI-080002	OAKS CI Training 2	State of Ohio
OCI-080001	OAKS CI Training 1	State of Ohio

Double click on the appropriate project

Project Logs

https://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer
Skire™ Unifier™ 12/09/2009 - Shauna Hooks

Home Company Workspace **Projects**

User Mode ▾

File Edit View Help

New Copy Open Find Import Export Template ▾

Design Reviews - Current View: All
8 Item(s)

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

Projects (Standard)

- OAKS CI Training 2 - Home
 - Summary
 - Alerts
 - uMail
 - Collaboration
 - Information
 - Cost Manager
 - Data Manager
 - Document Manager
 - Schedule Manager (Basic)
 - Logs**
 - 72 Hour Notice
 - Action Items
 - Advertisements
 - Associate A/E Evaluation
 - Budget - Initial
 - Budget - Revisions
 - Change Order
 - Closeout - Contractor
 - Closeout - Professional Services
 - Contract
 - Contract Schedule of Values
 - Contractor Evaluations
 - Contractor Pay Request
 - Design Reviews
 - Escrow Accounts

Click Logs

- Filing Cabinet for Project Records

Creation

- ▶ Click– **Work Assignments**
- Click– **New** at the top of the screen

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays 'Unifier@https://oaksci.ohio.gov - Windows Internet Explorer'. The user is identified as 'Shauna Hooks on behalf of Shauna Hooks (Last login: 12/28/2012 11:05 AM)'. The navigation tabs include 'Home', 'Company Workspace', and 'Projects'. The left sidebar contains a tree view of the application's structure, with 'Work Assignments' highlighted. The top toolbar features a 'New' button, which is pointed to by a red arrow. The main content area shows 'Work Assignments - Current View: All' with '0 Item(s)' and a table with columns: Vendor, District, Contract Reference, Amount (\$), and Start Date.

Vendor	District	Contract Reference	Amount (\$)	Start Date
--------	----------	--------------------	-------------	------------

Work Assignment-

- ▶ Each section of the record requires entry of relevant information.

- *Every line with an asterisk is a mandatory field and must be completed

Work Assignments - Educational Planning Services FY14 - Project No. SFC-130888 - Windows Internet Explo...

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General

General

Organization: Record Number:

Project Number: SFC-130888 Creator: Shauna Hooks

Project Name: OFCC Specialty Consultant List Creation Date:

Title: Educational Planning Services FY14 * Status:

Requested By: Shauna Hooks

Agreement

Contract Reference: Consultant Name-Project Number * Request Type: Original

Vendor Name: Amazing Architectural Inc. Type of Services: Educational Planning *

EDGE Certified Prime?: No Service Category: -Select-

Contacts

District: Allen East Local SD

Building Name(s): Bryant Elementary

District Location: Bryant City

District Contact: Amy Clause District Contact Phone: 614.555.5555

OFCC Contact: Shauna Hooks * OFCC Contact Phone: 614.555.7777 *

CM Contact: CM Contact Phone:

A/E Contact: A/E Contact Phone:

Action Details

Standard

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

Work Assignment form...

- ▶ Scroll down form and complete

Work Assignments - Educational Planning Services FY14 - Project No. SFC-130888 - Windows Internet Explo...

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment DISCUSSION SOV Close Window

General

Enter upto 4000 characters. For longer descriptions, drawings, or spreadsheets use an Attachment.

Details of Requested Consulting Service:

cut and paste information from original work assignment or type in

Budget and Schedule Details

Budgeted amount must also be entered on the lower form to make work assignment available on the vendors pay request.

Start Date: 08/21/2013 Completion Date: Budget Estimate (Not to be Exceeded): 45,000.00

Authorization

These fields are autopopulated based on workflow actions.

OFCC Signature: OFCC Action: OFCC Action Date: Consultant Signature: Consultant Action: Consultant Action Date:

Action Details

Standard

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

Add Line Items

- ▶ Click the Standard tab to identify the Work to be Assigned.

The screenshot shows a web browser window titled "Create New Work Assignments - Project No. SFC-130888 - Windows Internet Explorer". The browser's address bar shows "Workflow Actions -Select-". The page title is "Work Assignments". The form is divided into several sections:

- General:** Organization, Project Number (SFC-130888), Project Name (OFCC Specialty Consultant List), Title, Requested By, Record Number, Creator (Shauna Hooks), Creation Date, Status.
- Agreement:** Contract Reference (Consultant Name-Project Number), Vendor Name (Amazing Architectural Inc.), EDGE Certified Prime? (No), Request Type, Type of Services, Service Category.
- Contacts:** District, Building Name(s), District Location, District Contact, OFCC Contact, CM Contact, A/E Contact, District Contact Phone, OFCC Contact Phone, CM Contact Phone, A/E Contact Phone.

At the bottom of the form, there are four tabs: "Action Details", "Standard", "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)". A red arrow points to the "Standard" tab.

Adding Line Items

- ▶ The first line you will add will be the deduct line, this is to take money away from the original contract line to then give to the Work Assigned line. This will balance the work assignment.

Adding deduct line

- ▶ Click Add
- ▶ Click the Select next to Reference

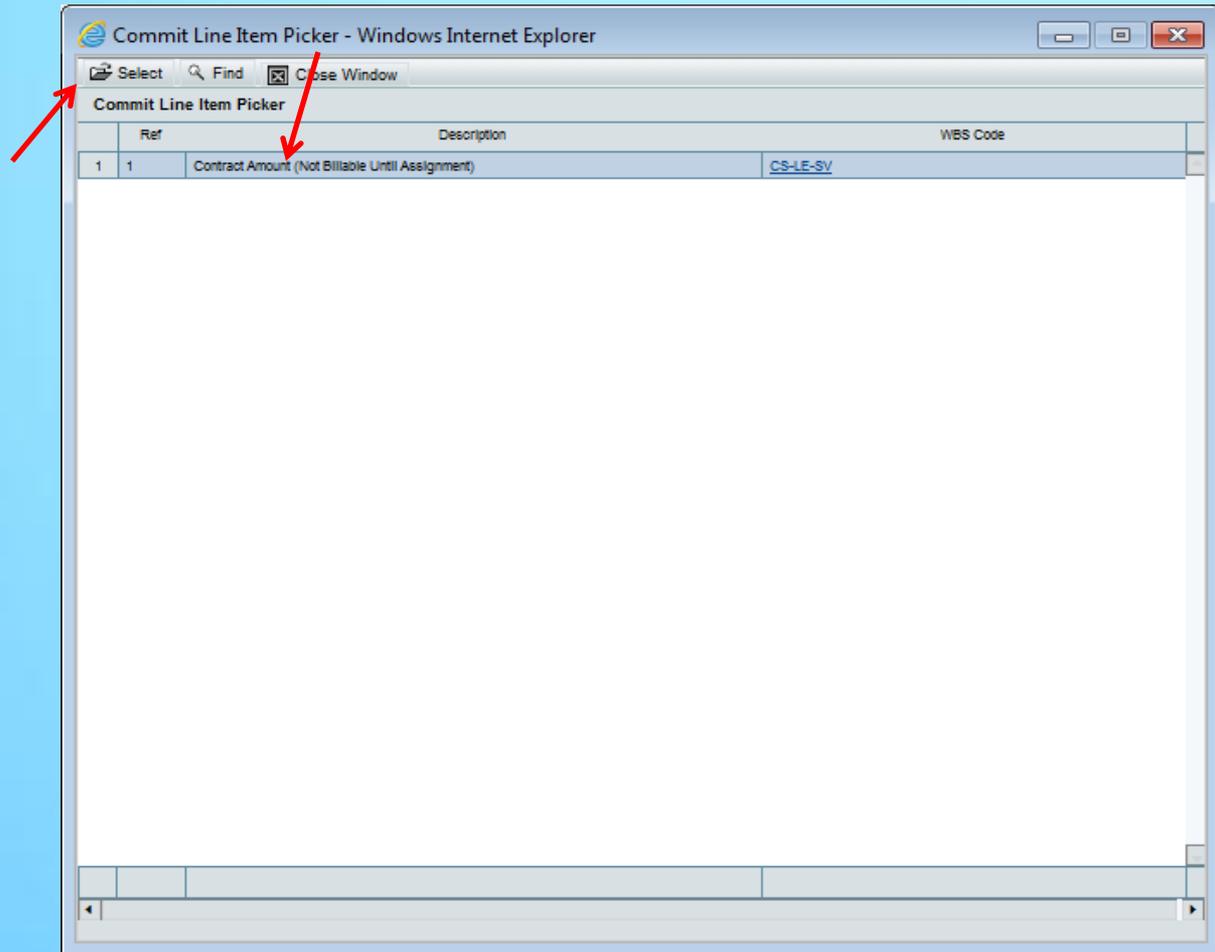
The screenshot shows a software interface for adding a deduct line. The main window is titled "Create New Professional Services Agreement" and has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar are buttons for "Send", "Save", "Spelling...", and "Add A". The main content area has tabs for "General", "Action Details", and "Agreement Details". The "General" tab is selected, and the "Current View" is set to "All". Below this, it says "0 Item(s)" and there is a table with columns "No.", "WBS Code", and "Code Name". At the bottom of the main window, there is a toolbar with buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". To the right of the toolbar, it says "Total Amount: \$ 0.00". At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

The modal dialog is titled "Line Item - Windows Internet Explorer" and has a menu bar with "Spelling...", "Attach", and "Delete Line Item". Below the menu bar, it says "Work Assignments Line Item:". The dialog has a "General" section with the following fields: "Reference:" with a "Select..." button, "WBS Code:" with a dropdown menu containing "Type a WBS code...", "Code Name:" with a text input field, "Short Description:" with a text input field, "District:" with a dropdown menu containing "-Select-", "Item Quantity:" with a text input field, "Units:" with a dropdown menu containing "-Select-", "Item Unit Cost:" with a text input field, "Amount (\$):" with a text input field containing "0.00", and "Description:" with a text area. Below the "General" section, there is a "Reporting" section with a field for "EDGE Certified Prime?". At the bottom of the dialog, there are buttons for "OK" and "Cancel".

A blue arrow points from the "Reference:" field in the dialog to the "Select..." button. Another blue arrow points from the "Add" button in the main window's toolbar to the "Add" button in the dialog's toolbar.

Add Line Items

- ▶ Highlight the Reference line
- ▶ The reference line will be the original contract line, you are removing money from this line to give to the work assignment
- ▶ Click Select



Add Line Items

- ▶ In Units choose Amount
- ▶ In Item Unit Cost deduct the total dollar amount of this work assignment, so if this is a 35,000 work assignment the total dollars will be **-35,000**
- ▶ Click OK

Line Item - Windows Internet Explorer

Spelling... Attach Delete Line Item

Work Assignments Line Item:

General

Reference: 1 Select...

WBS Code: CS-LE-SV *

Code Name: CS Legal SOV Pending

Short Description: Contract Amount (Not Billable Until Assignment) *

District: Adams County/Ohio Valley Local

Item Quantity:

Units: Amount *

Item Unit Cost: -35,000.00

Amount (\$): 0.00

Description:

Reporting

EDGE Certified Prime?:

Attachments (0) Linked Records (0)

OK Cancel

Add Work Assignment Line Items

- ▶ Click **Add**
- ▶ Click the **Arrow** next to **WBS Code**

The screenshot displays a software interface for creating professional services agreements. The main window, titled 'Create New Professional Services Agreements - Pro...', features a menu bar (File, Edit, View, Actions, Help) and a toolbar with buttons for Send, Save, Spelling, and Add Attachment. Below the toolbar are tabs for General, Action Details, and Agreement Details. The Agreement Details section shows 'Current View: All' and '0 Item(s)'. A table with columns 'No.', 'WBS Code', and 'Code Name' is currently empty. At the bottom of the main window, a toolbar includes buttons for Add, Copy, Import, Remove, Grid, and Find. A red arrow points to the 'Add' button. The 'Total Amount: \$' is displayed as 0.00. At the bottom, there are links for Attachments (0), Linked Records (0), General Comments, and Linked Mail (0).

The inset window, titled 'Line Item - Windows Internet Explorer', shows a form for 'Work Assignments Line Item'. It has a 'General' section with the following fields: Reference (with a 'Select...' button), WBS Code (with a dropdown arrow and a red asterisk), Code Name (with a red asterisk), Short Description (with a red asterisk), District (with a dropdown arrow), Item Quantity, Units (with a dropdown arrow and a red asterisk), Item Unit Cost, Amount (\$) (set to 0.00), and Description (a text area). A 'Reporting' section contains 'EDGE Certified Prime?' (a text field). At the bottom of the inset window, there are links for Attachments (0) and Linked Records (0), and 'OK' and 'Cancel' buttons. A blue arrow points to the 'Select...' button next to the WBS Code field.

Add Line Items

- ▶ Click **Collapse**

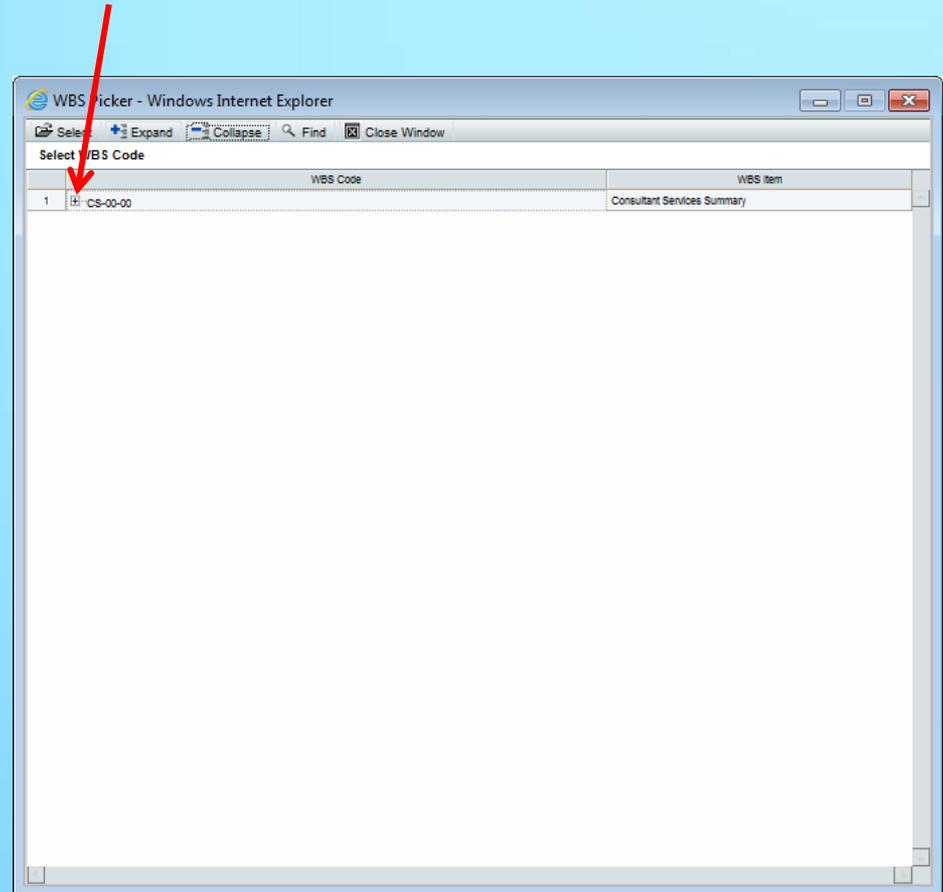
The screenshot displays the 'WBS Picker' application in a Windows Internet Explorer browser window. The main window shows a list of WBS codes and their corresponding names. A red arrow points to the 'Collapse' button in the toolbar. An inset window shows a detailed view of a selected WBS item.

	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
2	PA-PA-00	Property Acquisition General
3	PA-PA-BE	Property Acquisition Budget
4	PA-PA-RC	
5	PA-PA-AP	
6	PA-LA-00	
7	PA-LA-BE	
8	PA-LA-OT	
9	PA-EA-00	
10	PA-EA-BE	
11	PA-EA-OT	
12	RM-00-00	
13	RM-RM-00	
14	RM-RM-BE	
15	RM-RM-MX	
16	RM-RM-LS	
17	LE-00-00	
18	LE-LE-00	
19	LE-LE-BE	
20	LE-LE-CS	
21	LE-LE-DE	
22	LE-LE-PA	
23	LE-LE-BF	
24	OR-00-00	
25	OR-OR-00	
26	OR-OR-BE	
27	OR-PL-00	
28	OR-PL-BE	
29	OR-PL-PI	

	WBS Code	WBS Item
1	CS-00-00	Consultant Services Summary

Add Line Items

- ▶ Click + next to CS-00-00



Add Line Item

- ▶ Click + next to appropriate service codes (the fields will expand)
- ▶ Double click on appropriate code

The image displays two screenshots of the 'WBS Picker' application running in Internet Explorer. The top screenshot shows a table with columns 'WBS Code' and 'WBS Item'. The table is collapsed, showing only summary rows. A red arrow points to the '+' icon next to the code 'CS-FN-00'. The bottom screenshot shows the same table expanded, displaying a detailed list of codes and items. The code 'CS-PL-ED' is highlighted in blue, indicating it is the selected item.

	WBS Code	WBS Item
1	CS-00-00	Consultant Services Summary
2	CS-FN-00	CS Financial Services Summary
7	CS-LE-00	CS Legal Services Summary
12	CS-NF-00	CS Neutral Facilitation Services Summary
21	CS-PL-00	CS Planning Services Summary
31	CS-FA-00	CS Assessment Services

	WBS Code	WBS Item
1	CS-00-00	Consultant Services Summary
2	CS-FN-00	CS Financial Services Summary
7	CS-LE-00	CS Legal Services Summary
12	CS-NF-00	CS Neutral Facilitation Services Summary
13	CS-NF-SV	CS Facilitation SOV Pending
14	CS-NF-PF	CS Partnering Facilitation
15	CS-NF-OMS	CS Organizational Meeting Facilitation
16	CS-NF-CH	CS Charrette Facilitation
17	CS-NF-EF	CS Eco Charrette Facilitation
18	CS-NF-BP	CS BIM Execution Plan Facilitation
19	CS-NF-GA	CS GMP Amendment Facilitation
20	CS-NF-OT	CS Other Facilitation Services
21	CS-PL-00	CS Planning Services Summary
22	CS-PL-SV	CS Planning SOV Pending
23	CS-PL-MP	CS Master Planning Service
24	CS-PL-ED	CS Educational Planning Service
25	CS-PL-RP	CS Regional Planning Service
26	CS-PL-ER	CS Enrollment Projection Service
27	CS-PL-DM	CS Design Manual Update Service
28	CS-PL-TR	CS Planning Training or Coaching
29	CS-PL-PR	CS Program of Requirements
30	CS-PL-OT	CS Other Planning Service
31	CS-FA-00	CS Assessment Services

Enter Line Item Information

- ▶ Enter a Short Description
- ▶ Choose District if applicable
- ▶ Complete remaining open fields

Line Item - Windows Internet Explorer

Spelling... Attach Delete Line Item

Work Assignments Line Item:

General

Reference: Select...

WBS Code: CS-PL-ED *

Code Name: CS Educational Planning Service

Short Description: Description of Service Provided *

District: Akron City SD

Item Quantity: 1

Units: Amount *

Item Unit Cost: 35,000.00

Amount (\$): 35,000.00

Description:

Reporting

EDGE Certified Prime?:

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

OK Cancel

Lower Form

- ▶ When complete the form should look similar to the example
- ▶ Notice that the Total Amount is 0.00
- ▶ This is because we are simply **shifting** money.

The screenshot shows a web application window titled "Create New Work Assignments - Project No. SFC-130888 - Windows Internet Explorer". The window contains a "Work Assignments" table with the following data:

No.	WBS Code	Code Name	Short Description	Amount (\$)	District
002	CS-LE-SV	CS Ed SOV Pending	Contract Amount (Net)	-35,000.00	Adams County/Ohio
001	CS-PL-ED	CS Educational Planning Service	Description of service	35,000.00	Adams County/Ohio

The "Total Amount" is 0.00, as indicated by a red arrow pointing to the "Total Amount" field in the bottom right corner of the table.

Submit Record to Consultant

- Choose Workflow Action
- Click To box and choose Consultant
- Click Send

Work Assignments - Test - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

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

Work Assignments

General

General

Organization: [] Record Number: []

Project Number: SFC-130888 Creator: Melanie Drerup

Project Name: OFCC Specialty Consultants Creation Date: []

Title: Test * Status: []

Requested By: []

Action Details

Create New Work Assignments

To: []

Cc: []

Send For: []

Task Notes:

Standard

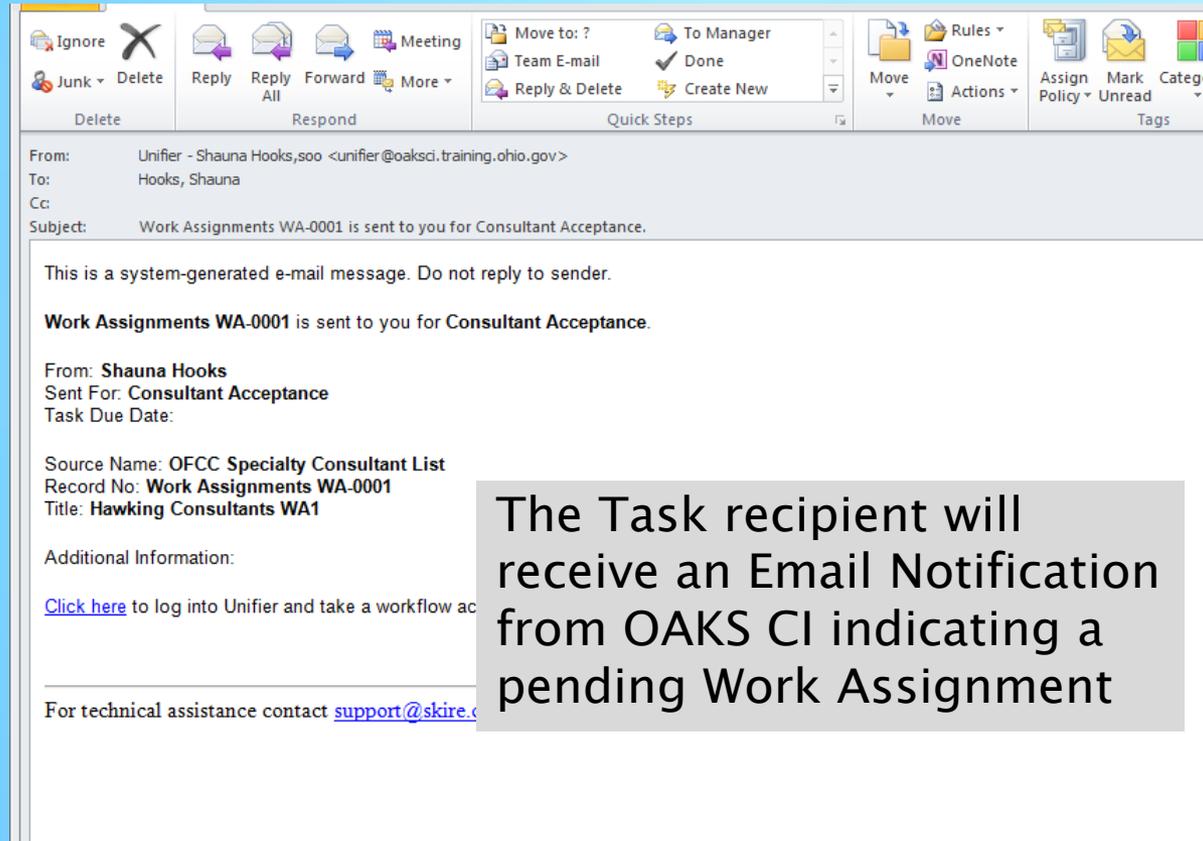
Current View: All

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

No.	WBS Code	Code Name	Short Description	Amount (\$)	District

Once a record is created and submitted it will become a *Task* for the next person in the workflow

Task Notification



The screenshot displays an email client interface with a ribbon menu at the top. The ribbon includes sections for 'Delete' (Ignore, Delete), 'Respond' (Reply, Reply All, Forward, Meeting, More), 'Quick Steps' (Move to: ?, Team E-mail, Reply & Delete, To Manager, Done, Create New), 'Move' (Move, Rules, OneNote, Actions), and 'Tags' (Assign Policy, Mark Unread, Catego). The email content is as follows:

From: Unifier - Shauna Hooks,soo <unifier@oaksci.training.ohio.gov>
To: Hooks, Shauna
Cc:
Subject: Work Assignments WA-0001 is sent to you for Consultant Acceptance.

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

Work Assignments WA-0001 is sent to you for **Consultant Acceptance**.

From: **Shauna Hooks**
Sent For: **Consultant Acceptance**
Task Due Date:

Source Name: **OFCC Specialty Consultant List**
Record No: **Work Assignments WA-0001**
Title: **Hawking Consultants WA1**

Additional Information:
[Click here](#) to log into Unifier and take a workflow ac

For technical assistance contact support@skire.c

The Task recipient will receive an Email Notification from OAKS CI indicating a pending Work Assignment