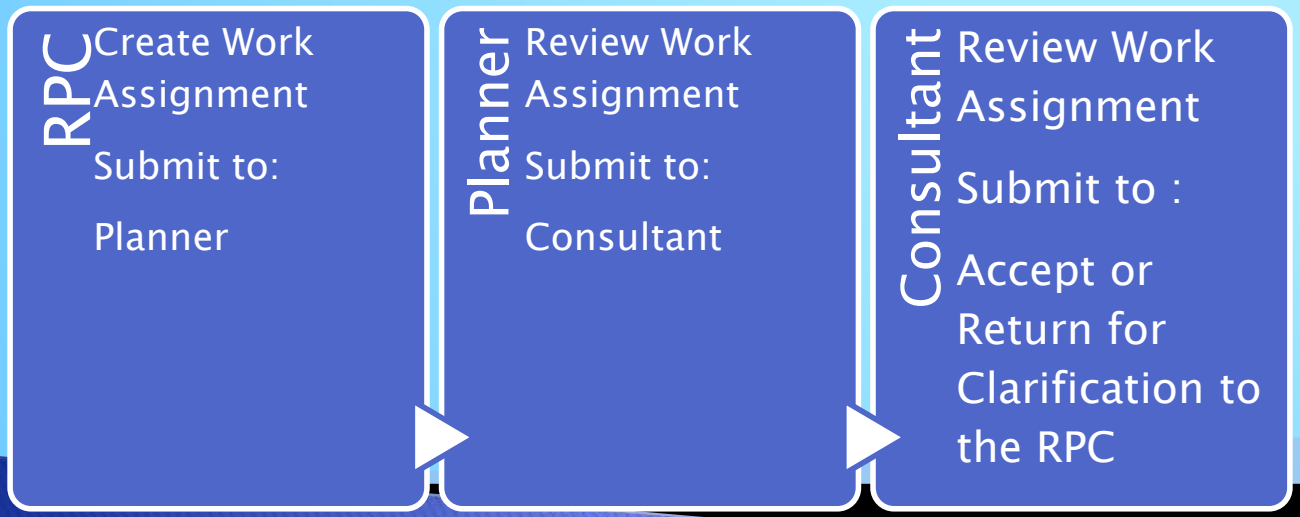
OAKS CI
Capital Improvements (Management System)

Regional Planning Coordinator
Create Work Assignment –Pg.2
Amend Work Assignment–Pg.25
Review Payment Application– Pg. 34
Create Payment Request for **your** firm– Pg. 43

Create Work Assignment

Workflow



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 | Agency | Higher Ed

User Mode

- Home
  - Tasks
  - Messages
  - Drafts
  - uMail

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

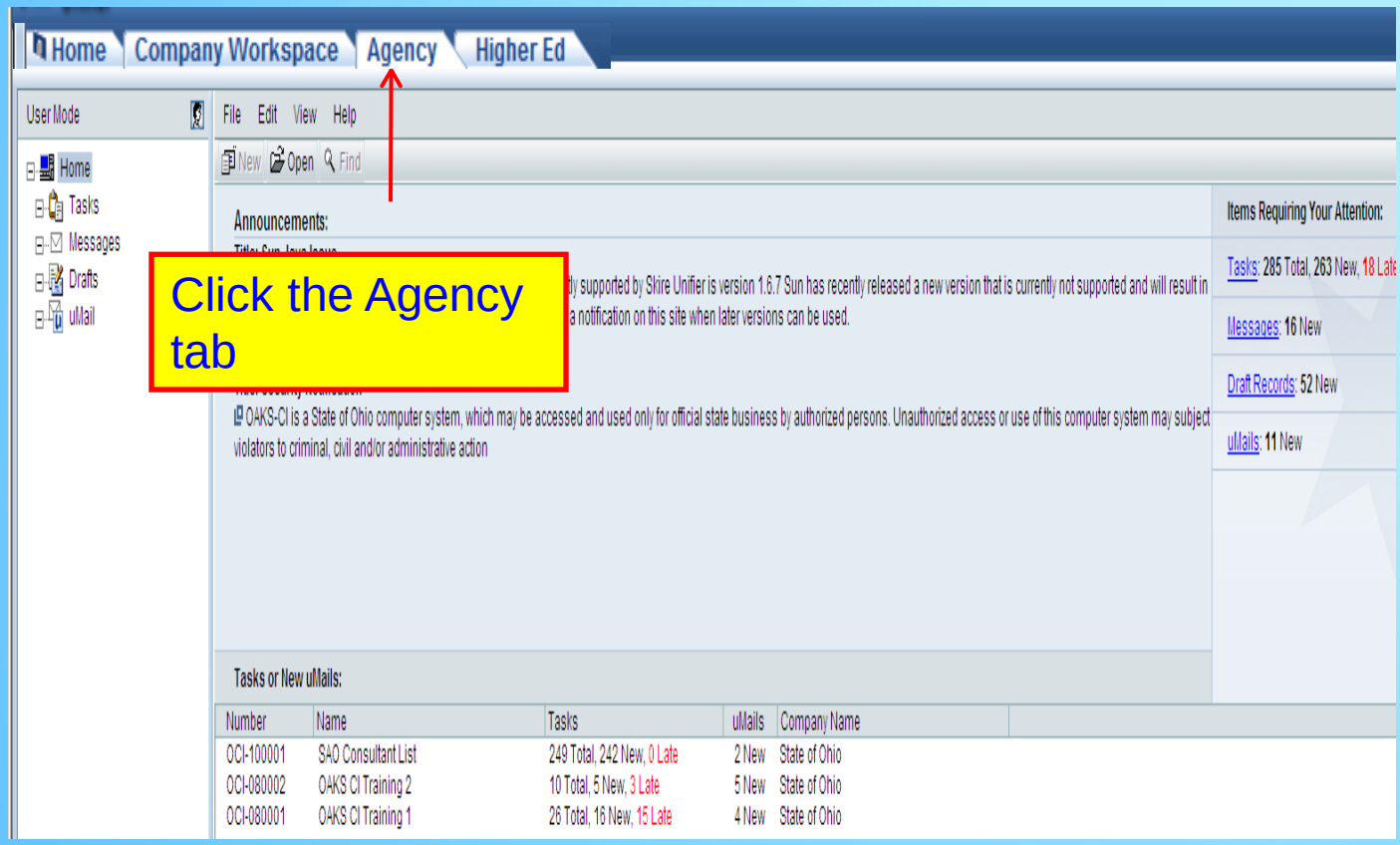
Draft Records: **315** New

uMails: **26** New

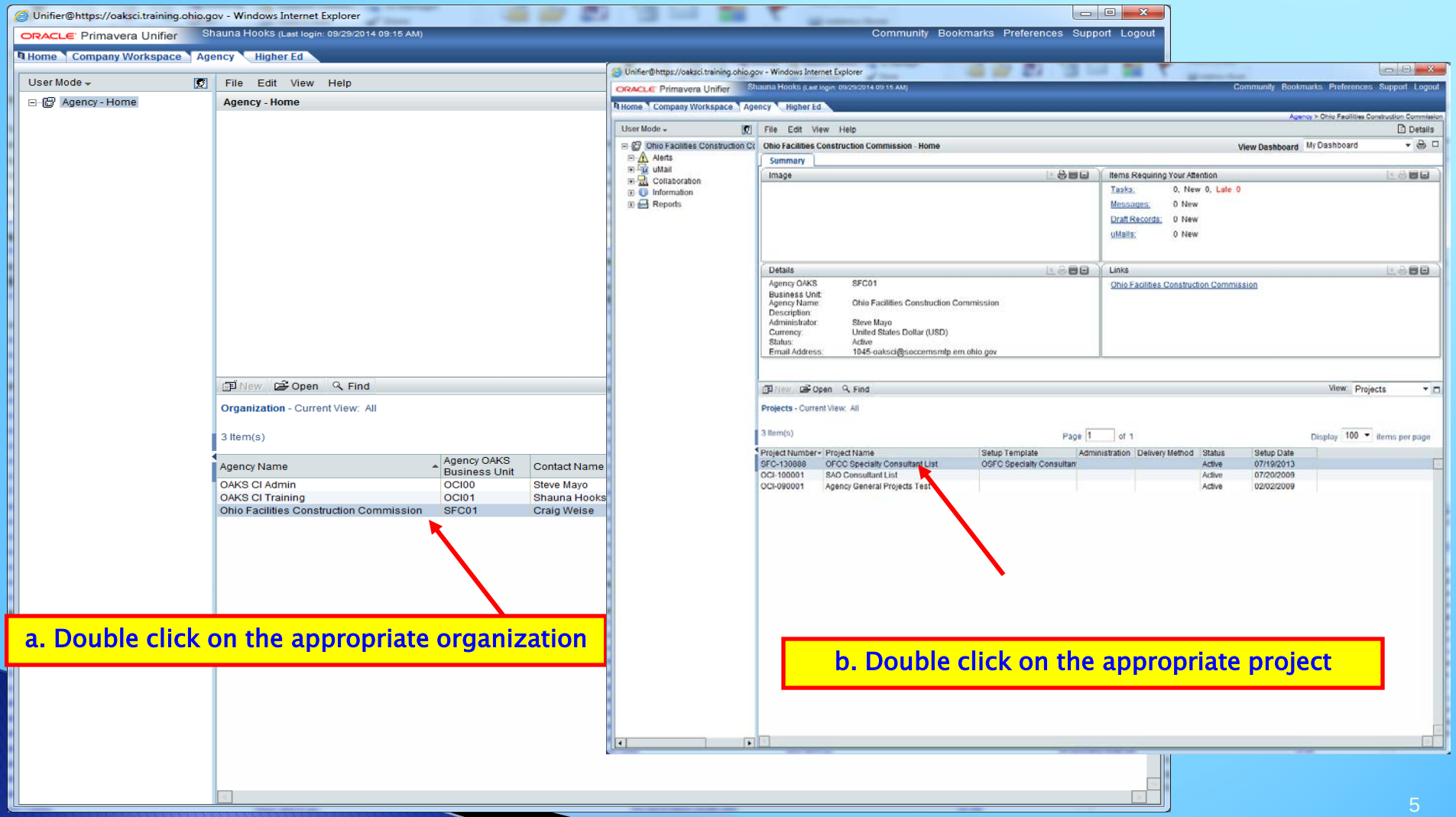
Tasks or New uMails:

Number	Name	Tasks	uMails	Company Name
WSU Test Proje	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	1 New	State of Ohio
CLS-110001	Cleveland State Training Project	16 Total, 15 New, 7 Late		State of Ohio

Cross Project Home Page

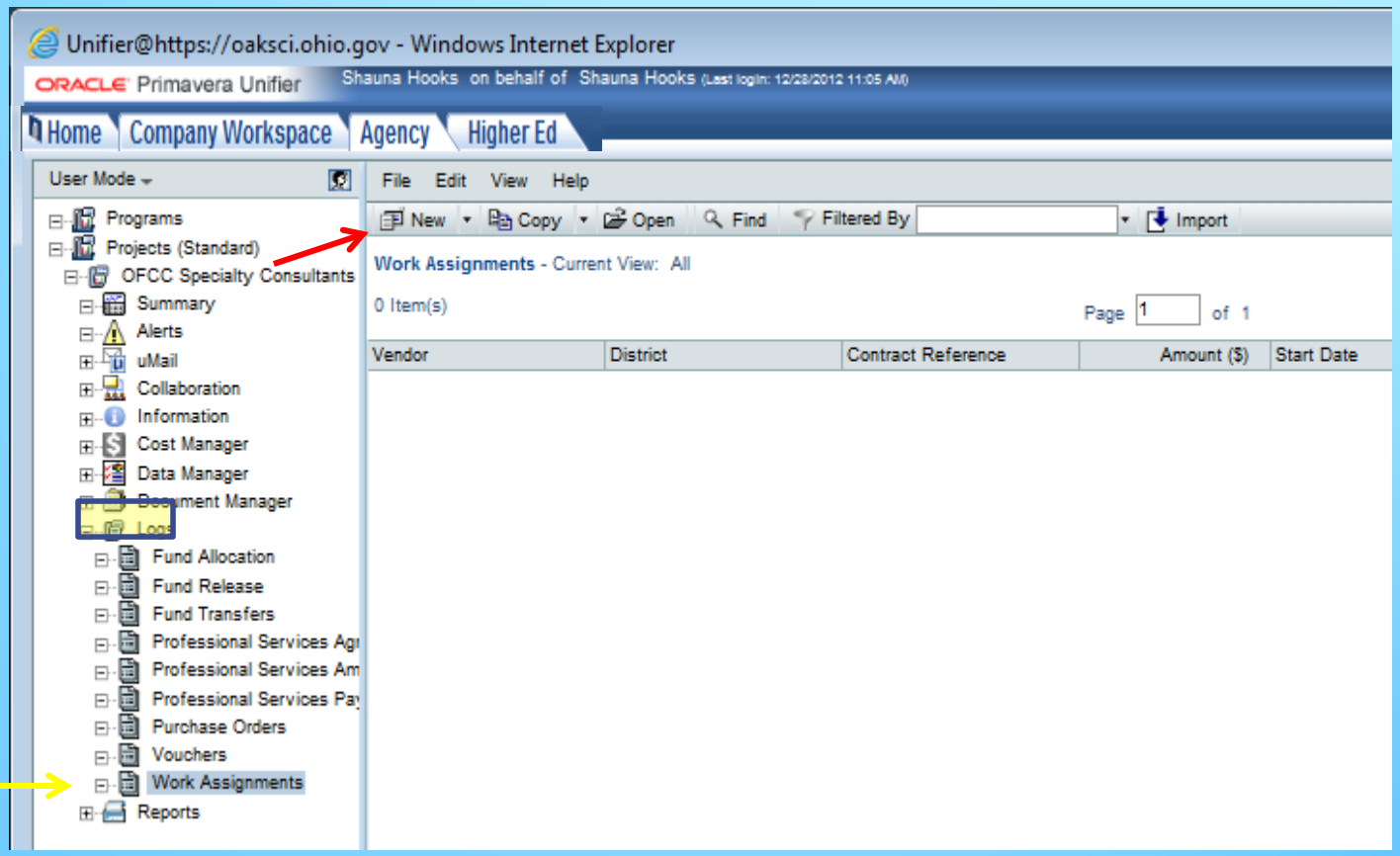


Getting into your Project



Creation

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



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

Work Assignments

General

Click the Tab to expand the area

General

Organization:
Project:
Project Name: OFCC Specialty Consultant List
Title: Educational Planning Services FY14 *
Requested By: Shauna Hooks
Record Number:
Creator: Shauna Hooks
Creation Date:
Status:

Agreement

Contract Reference: Consultant Name-Project Number Select... *
Vendor Name: Amazing Architectural Inc.
EDGE Certified Prime?: No
Request Type: Original
Type of Services: Educational Planning *
Service Category: -Select-

Contacts

District: Allen East Local SD
Building Name(s): Bryant Elementary
District Location: Bryant City
District Contact: Amy Clause
OFCC Contact: Shauna Hooks *
CM Contact:
A/E Contact:
District Contact Phone: 614.555.5555
OFCC Contact Phone: 614.555.7777 *
CM Contact Phone:
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

Work Assignments

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 actons.

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.

Create New Work Assignments - 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:

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 Select... *

Vendor Name: Amazing Architectural Inc.

EDGE Certified Prime?: No

Request Type: -Select-

Type of Services: -Select- *

Service Category: -Select-

Contacts

District: -Select-

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:

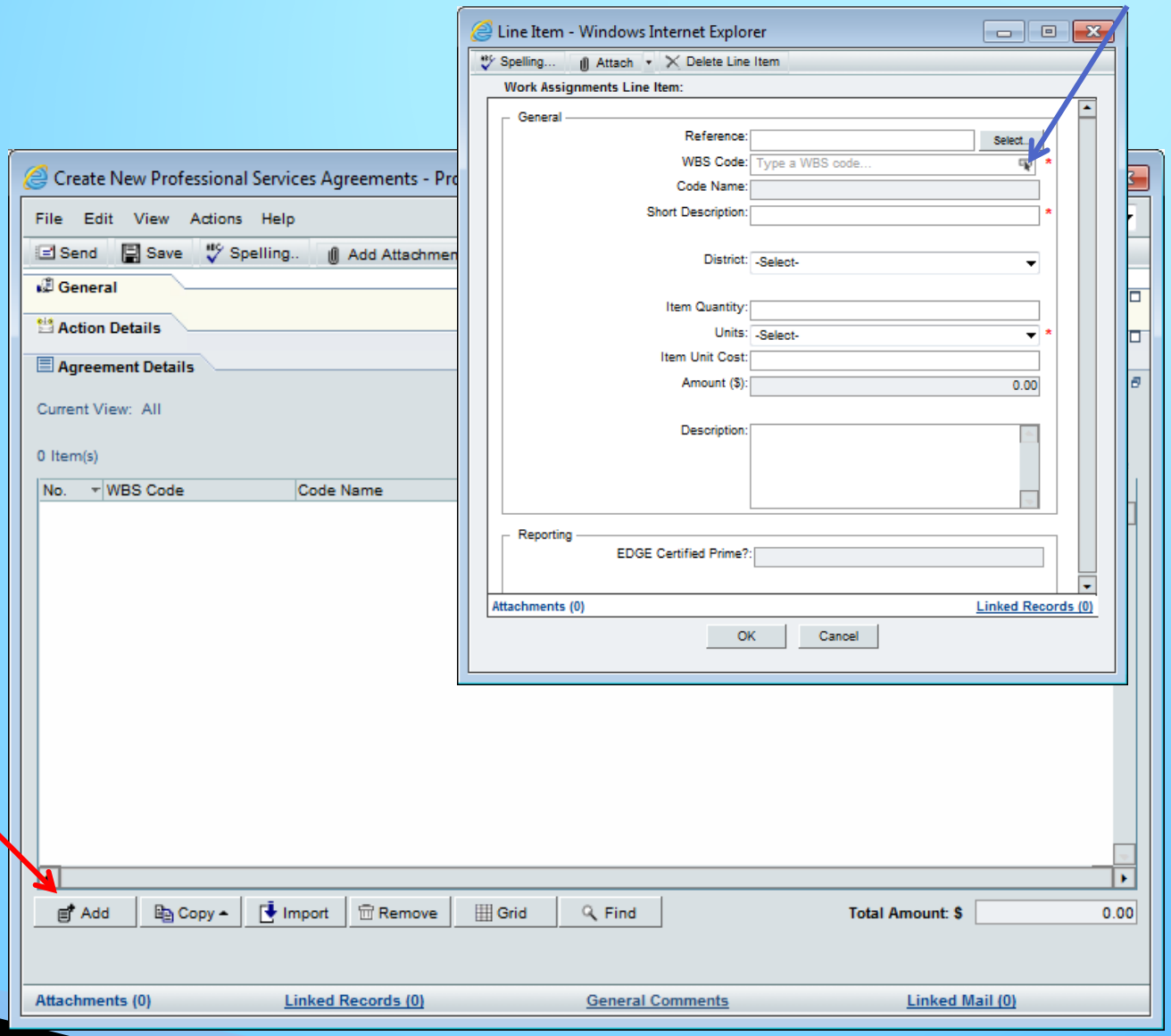
Action Details

Standard

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

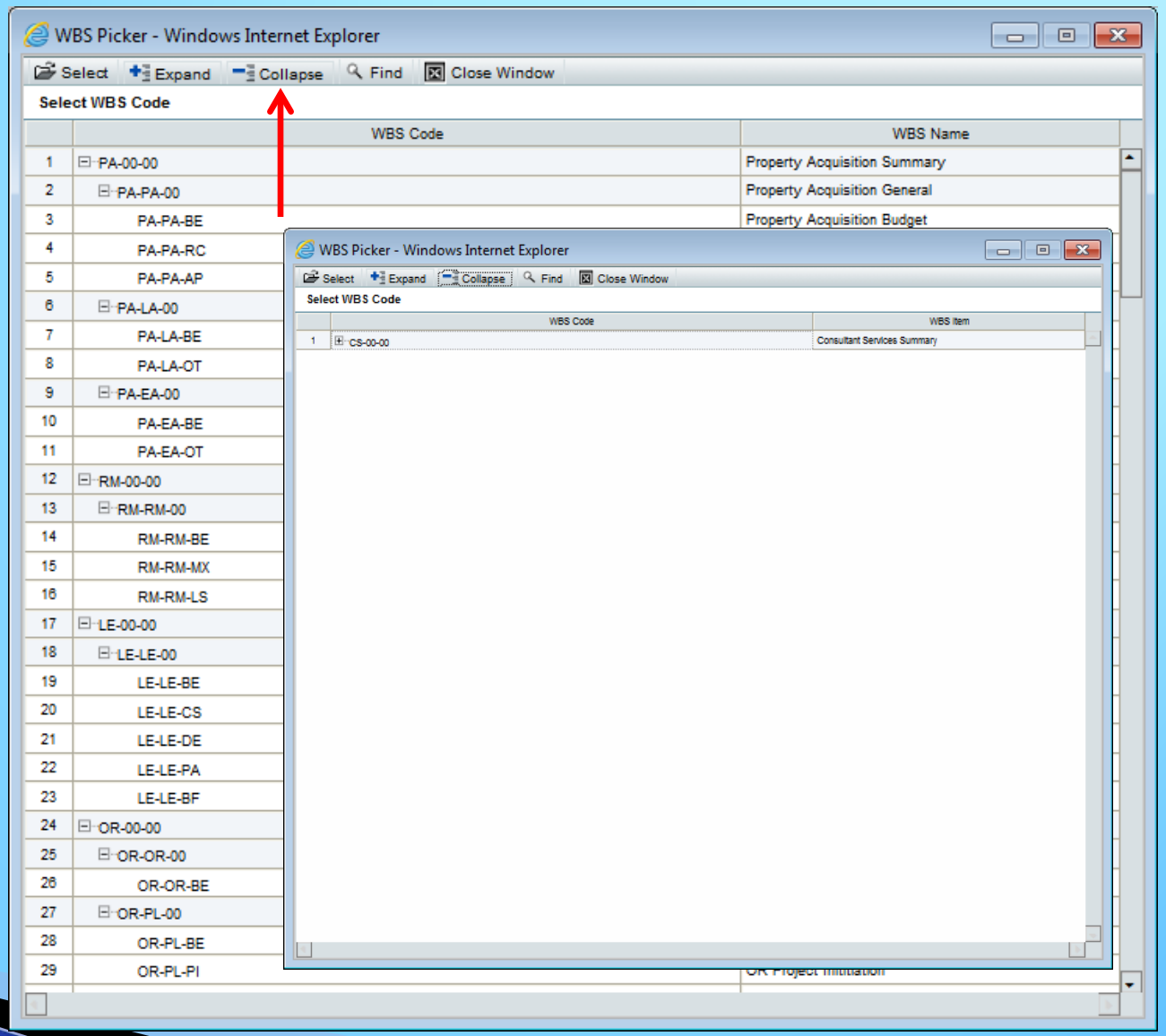
Add Work Assignment Line Items

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



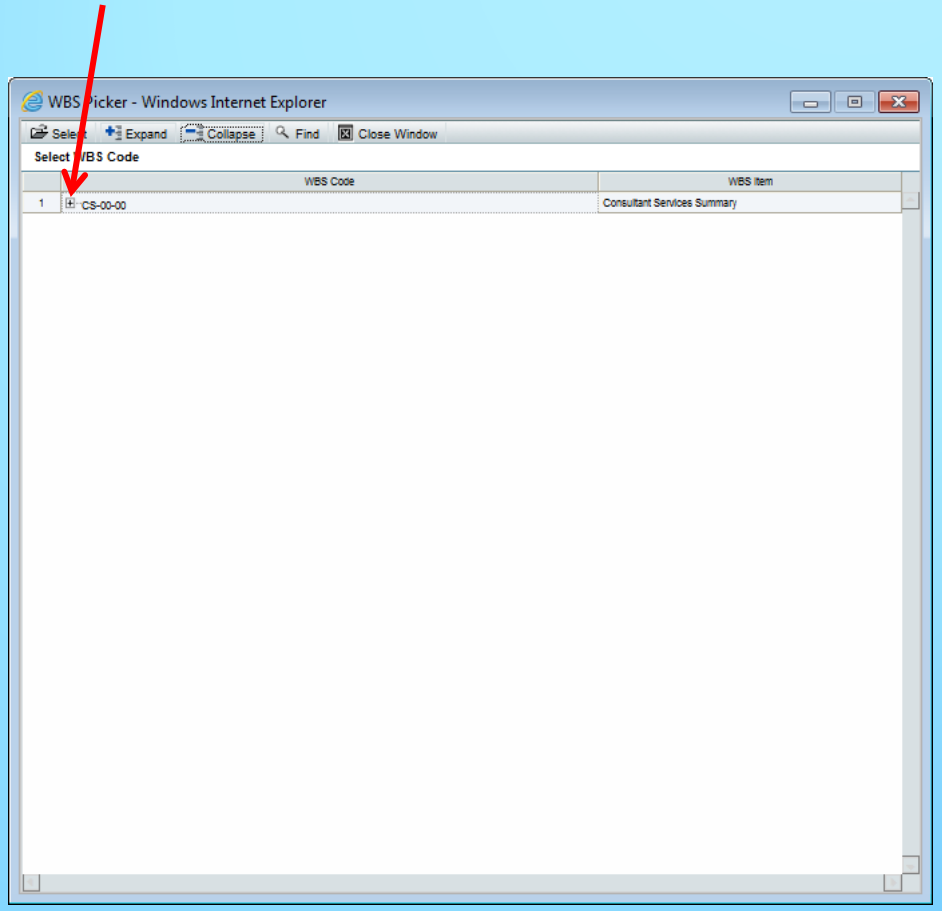
Add Line Items

- Click Collapse



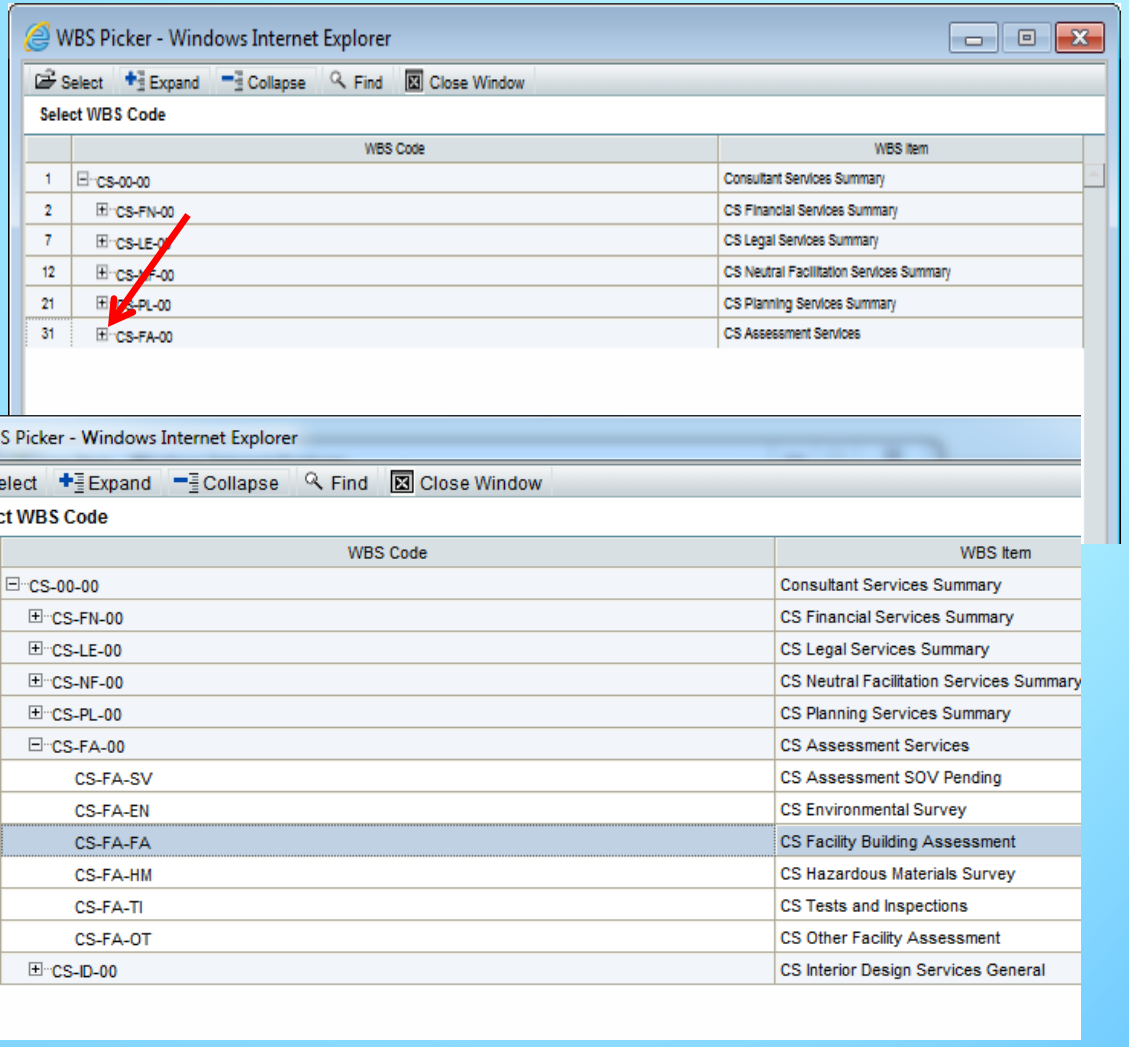
Add Line Items

- Click + next to CS-00-00



Add Line Items

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

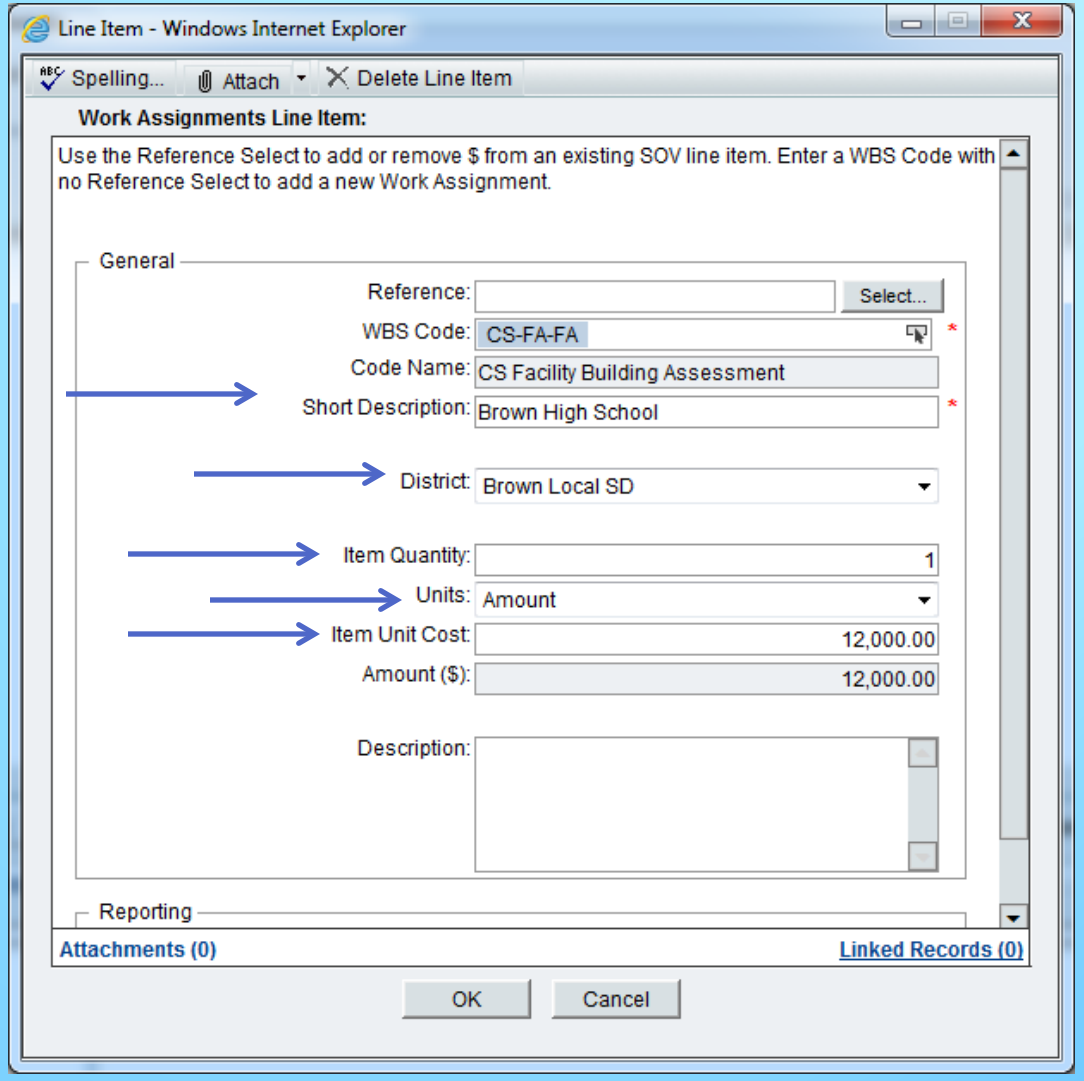


Enter Line Item Information

- Enter a Short Description
- Choose District
- Complete remaining open fields
- This example is identifying the quantity as 1, Units will be Amount and Item Cost will be the estimated cost of work for this school district

- Click OK

See page 23 for contract reference



Lower Form

- Continue adding lines to identify all schools and printing fees.
- One district per work assignment

Work Assignments - Brown LSD Assessment - 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:

Project Number: SFC-130888

Project Name: OFCC Specialty Consultant List

Title: Brown LSD Assessment *

Requested By: Bill Brandon

Record Number:

Creator: Shauna Hooks

Creation Date:

Status:

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
001	CS-FA-OT	CS Other Facility Assessment	Brown High School	12,788.00	Brown Local SD

Add Copy Import Remove Grid Find

Total Amount: $ 12,788.00

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

Work Assignments - Brown LSD Assessment - Project No. SFC-1308

File Edit View Actions Help

Send Save Spelling.. Add Attachment

General

Action Details

Standard

Current View: All

4 Item(s)

Page 1 of 1

Display 100 items per page

No.	WBS Code	Code Name	Short Description	Amount ($)	District
004	CS-FA-OT	CS Other Facility Assessment	Brown LSD Printing Fee	105.00	Brown Local SD
003	CS-FA-OT	CS Other Facility Assessment	Brown Elementary School	7,317.00	Brown Local SD
002	CS-FA-OT	CS Other Facility Assessment	Brown Jr . High School	8,419.00	Brown Local SD
001	CS-FA-OT	CS Other Facility Assessment	Brown High School	12,788.00	Brown Local SD

Add Copy Import Remove Grid Find

Total Amount: $ 28,629.00

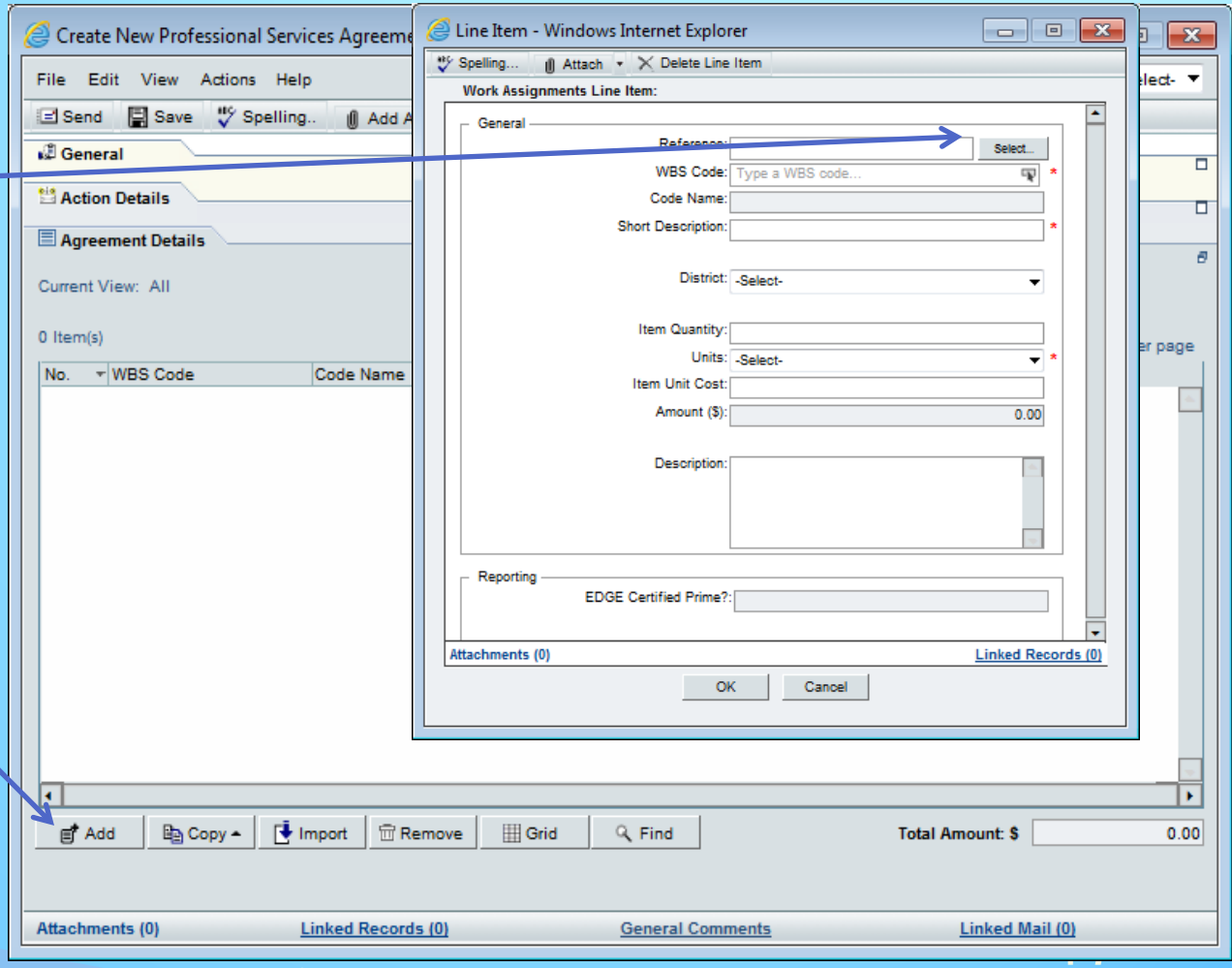
Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Subtract money from contract amount

- Now that you have added all of your cost's you must pull the money from the original contract amount. This will balance the work assignment.

Adding deduct line

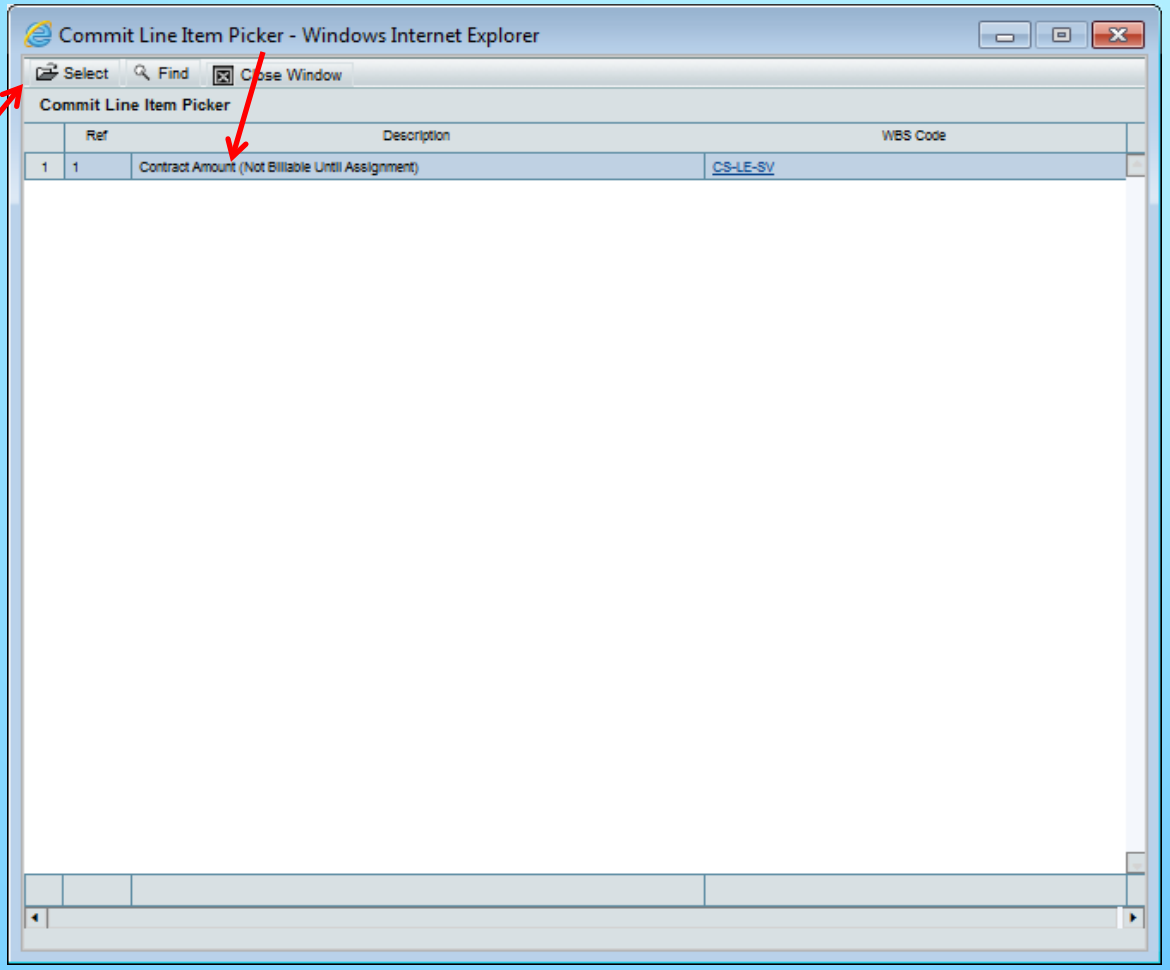
- Click Add
- Click the Select next to **Reference**



Add Line Items

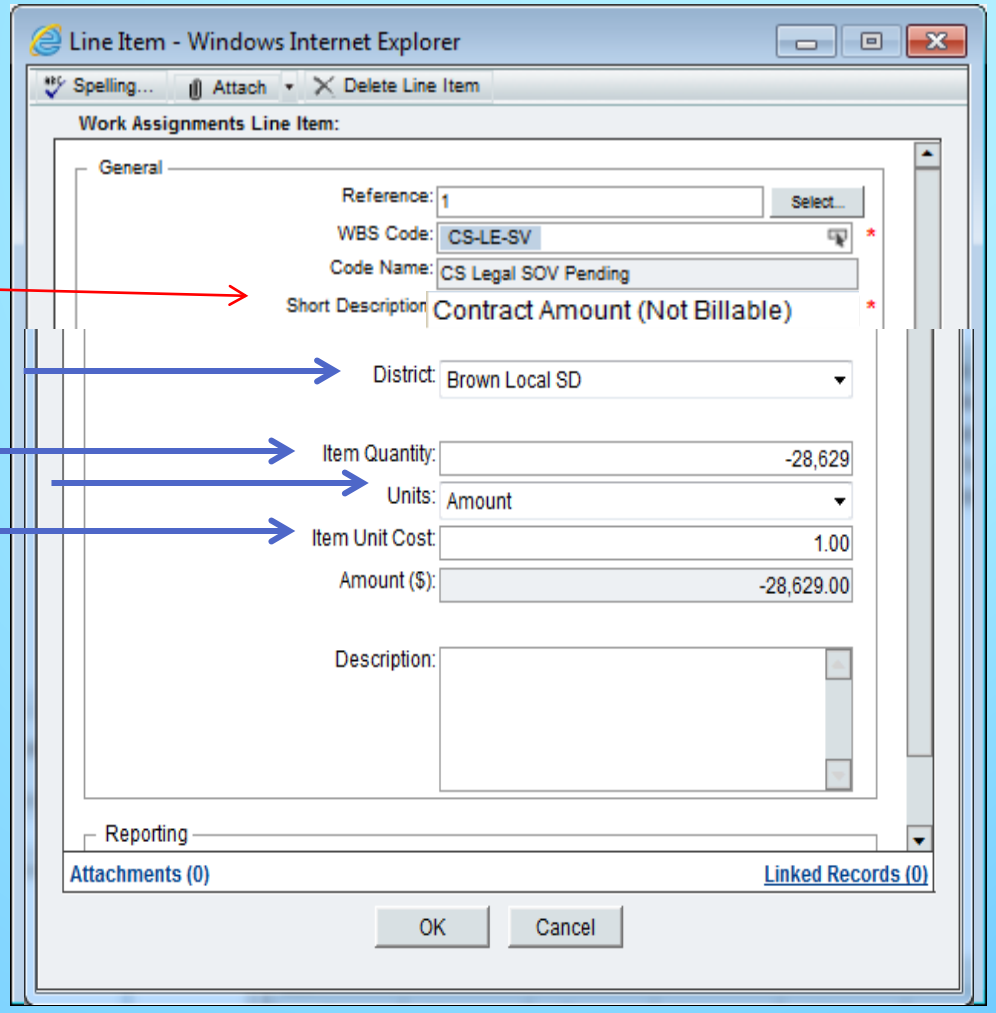
- Highlight the Reference line
- The reference line will be the original contract line, you are removing money from this line to give to the work assignment

- Click Select



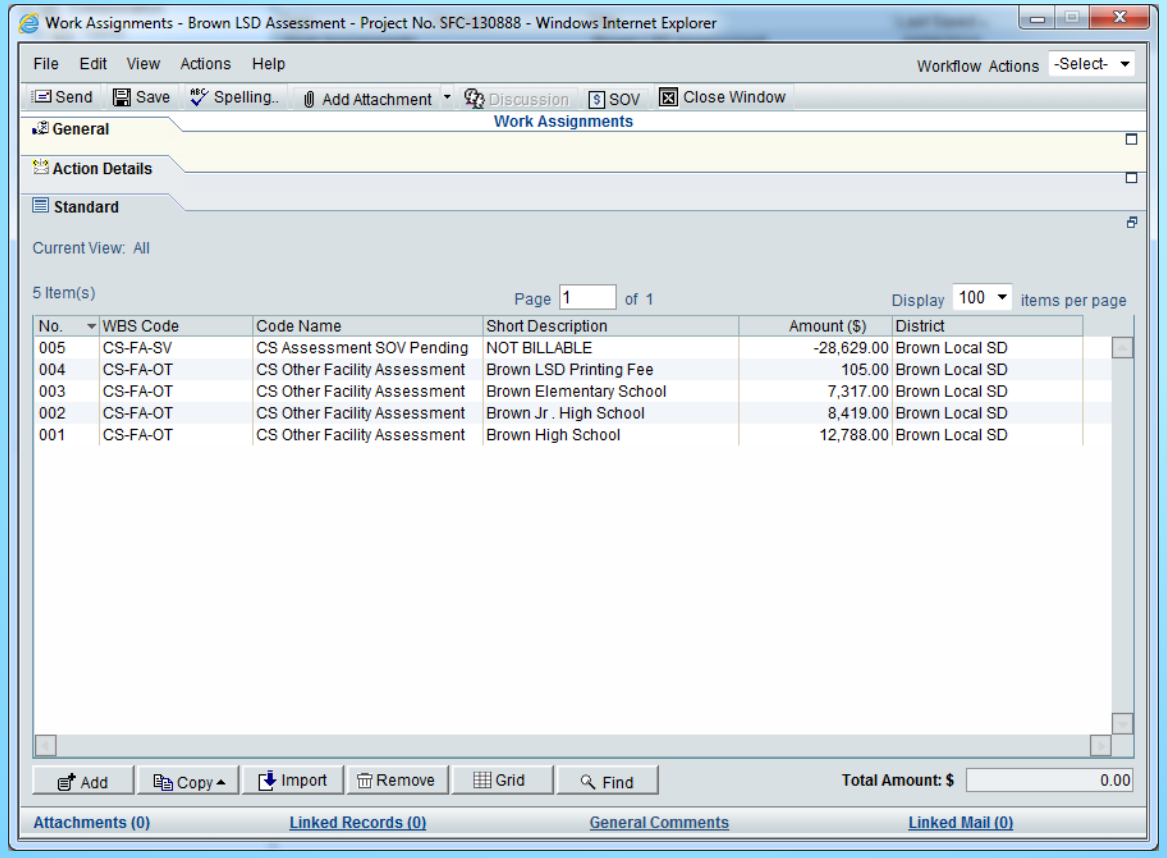
Add Line Items

- Item Quantity: Negative dollar amount
- Units: Amount
- Item Unit Cost: 1.00
- Click OK



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.



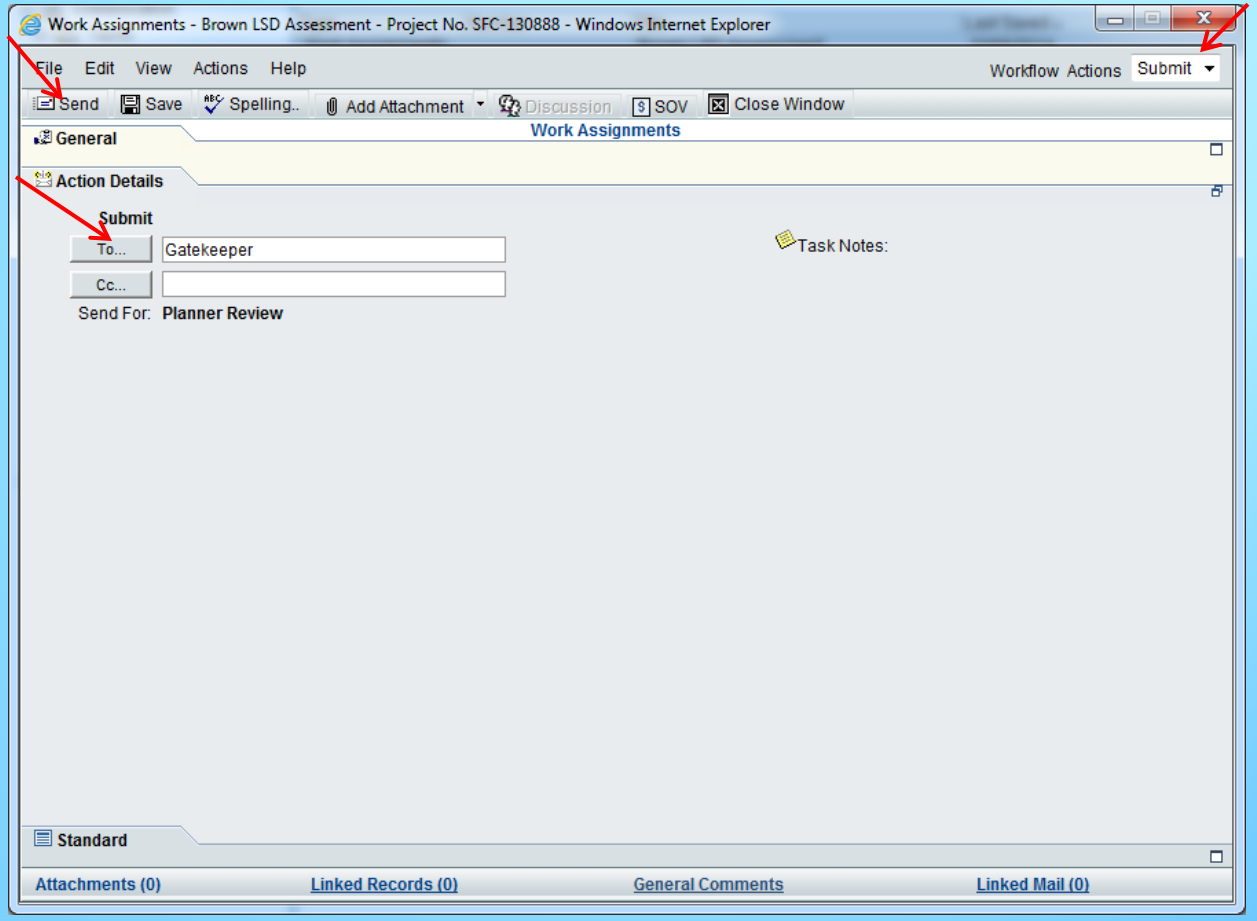
No.	WBS Code	Code Name	Short Description	Amount ($)	District
005	CS-FA-SV	CS Assessment SOV Pending	NOT BILLABLE	-28,629.00	Brown Local SD
004	CS-FA-OT	CS Other Facility Assessment	Brown LSD Printing Fee	105.00	Brown Local SD
003	CS-FA-OT	CS Other Facility Assessment	Brown Elementary School	7,317.00	Brown Local SD
002	CS-FA-OT	CS Other Facility Assessment	Brown Jr . High School	8,419.00	Brown Local SD
001	CS-FA-OT	CS Other Facility Assessment	Brown High School	12,788.00	Brown Local SD

Submit Record to Consultant

-Choose Workflow Action

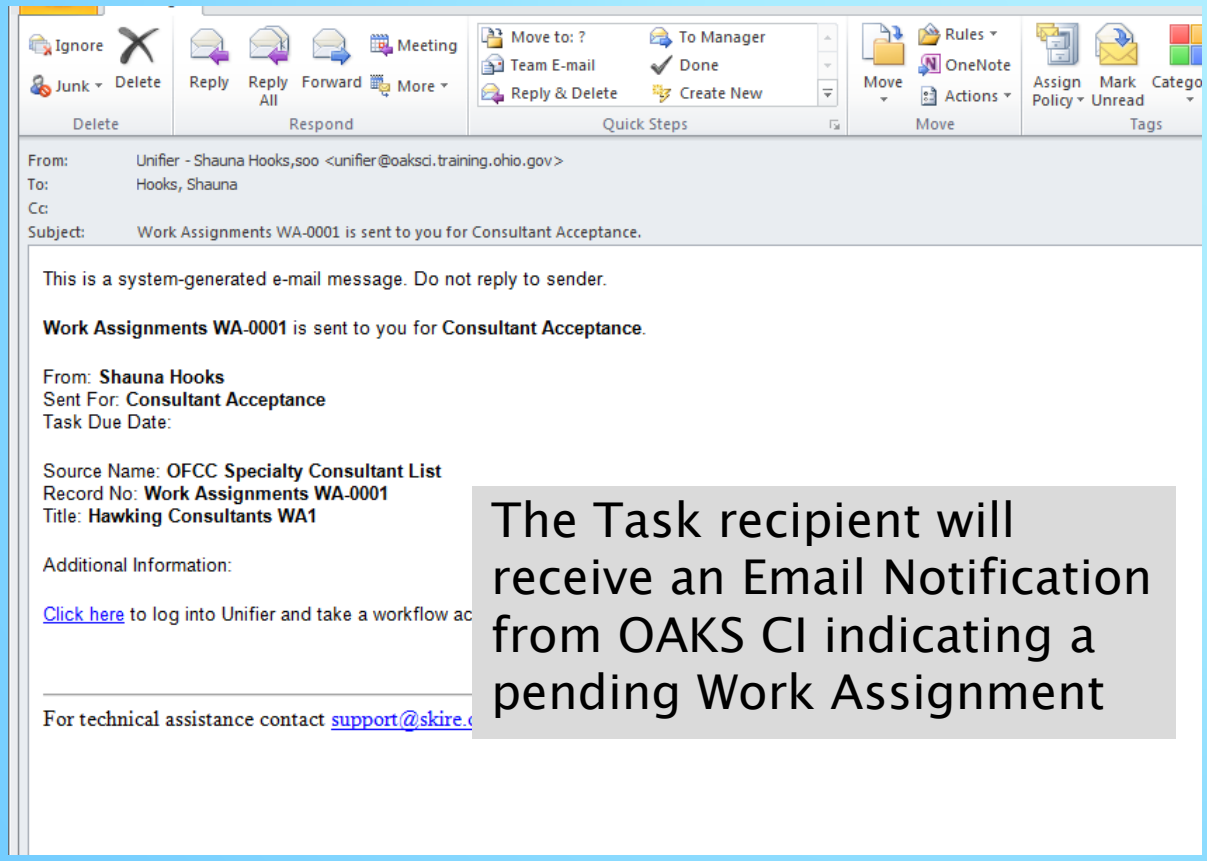
-Click To box and choose your Planner contact with OFCC

-Click Send



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

Task Notification



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

Contract Reference

Exhibit B - Consultant's Scope of Services

State of Ohio Professional Services Agreements for Public Facility Construction

M130-13v0912 Page 1 of 2

A. **Assessment for School Facilities Projects**. The Consultant will assess the condition of each facility in an assigned district, evaluate the overall building needs of the district, estimate costs and assist to develop a district-wide master plan, according to procedures more fully described in the Assessment Consultant General Scope Guidelines and Commission policies as updated from time to time.

1. Assessment services for a K – 12 School District will be compensated at the rate of **10 cents per square foot**, which shall include all the Consultant's fees and expenses for assessment services, including subconsultant fees and expenses. If the Consultant is assigned a school district with **135,000 or less square feet** of total facilities space, the Consultant will be compensated at a **minimum fee of $13,500**.

2. Assessment services for a JVS District or the career technical square footage of a comprehensive high school will be compensated at the rate of **11 cents per square foot**, which shall include all the Consultant's fees and expenses for assessment services, including subconsultant fees and expenses.

3. The Consultant shall submit invoices for services at the completion of the following phases of the work: 1) Submission of Draft Electronic Assessment Report and one (1) printed copy of the Assessment Report, 2) Completion of all revisions to the Assessment Report; and 3) Delivery of Final Electronic Assessment Report. The services shall be compensated in accordance with the following percentages:

Submission of Draft Electronic Assessment Report 65%

Complete Revisions to Assessment Report 20%

Delivery of Final Electronic Assessment Report 15%

4. The Consultant will be compensated **$35 per building for all printing costs** associated with providing one (1) copy of a report with color photographs and six (6) flash drives.

5. The Consultant agrees to **review and evaluate supplemental information**, which does not involve errors in the original report, at the request of the Commission regarding the Assessment. The Consultant will provide a written report and one (1) copy of inserts for the Assessment Report and six (6) flash drives at the conclusion of the re-evaluation process. The Commission agrees to compensate the Consultant in the amount of **$65.00 per hour** for such professional services, which shall include all fees, expenses and printing costs for re-evaluation services. The Consultant may invoice for re-evaluation services on a monthly basis.

Amend Work Assignment

Many times a work assignment is created based on an estimate of square footage the following will walk you thru Amending an already agreed upon Work Assignment

In order to Amend a Work Assignment , a new assignment must be created.

Create New Work Assignments - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

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

General Work Assignments

General

Organization:
Project Number: SFC-130888
Project Name: OFCC Specialty Consultant List
Title: Champion LSD Amendment *
Requested By: Jon Brown
Record Number:
Creator: Shauna Hooks
Creation Date:
Status:

Agreement

Contract Reference: Harrison Planning Group - Facilities Select... *
Vendor Name: Harrison Planning Group
EDGE Certified Prime?:
Request Type: Amended
Type of Services: Facilities Assessment *
Service Category: -Select-

Contacts

District: Champion Local SD
Building Name(s):
District Location:
District Contact:
OFCC Contact: Bill Brown *
CM Contact:
A/E Contact:
District Contact Phone:
OFCC Contact Phone: 614.555.5555 *
CM Contact Phone:
A/E Contact Phone:

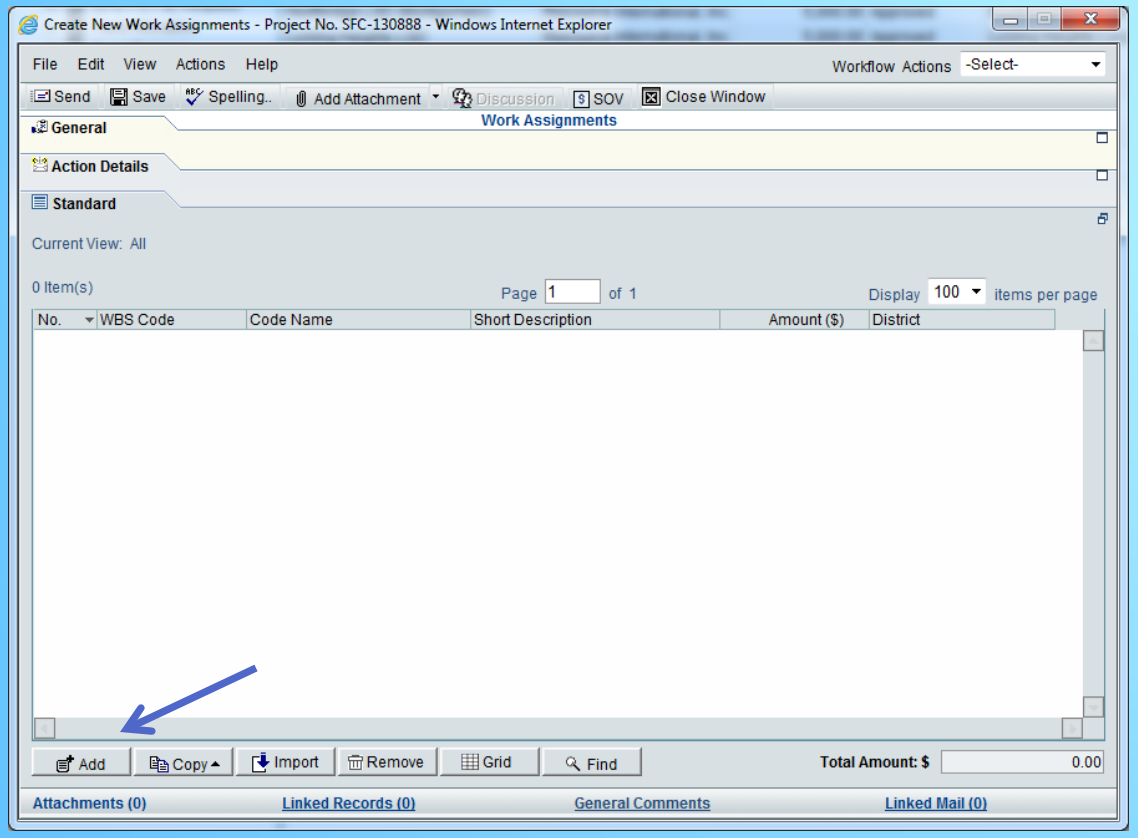
Action Details

Standard

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

Complete form as you did in the initial Work Assignment
Request Type : choose Amended

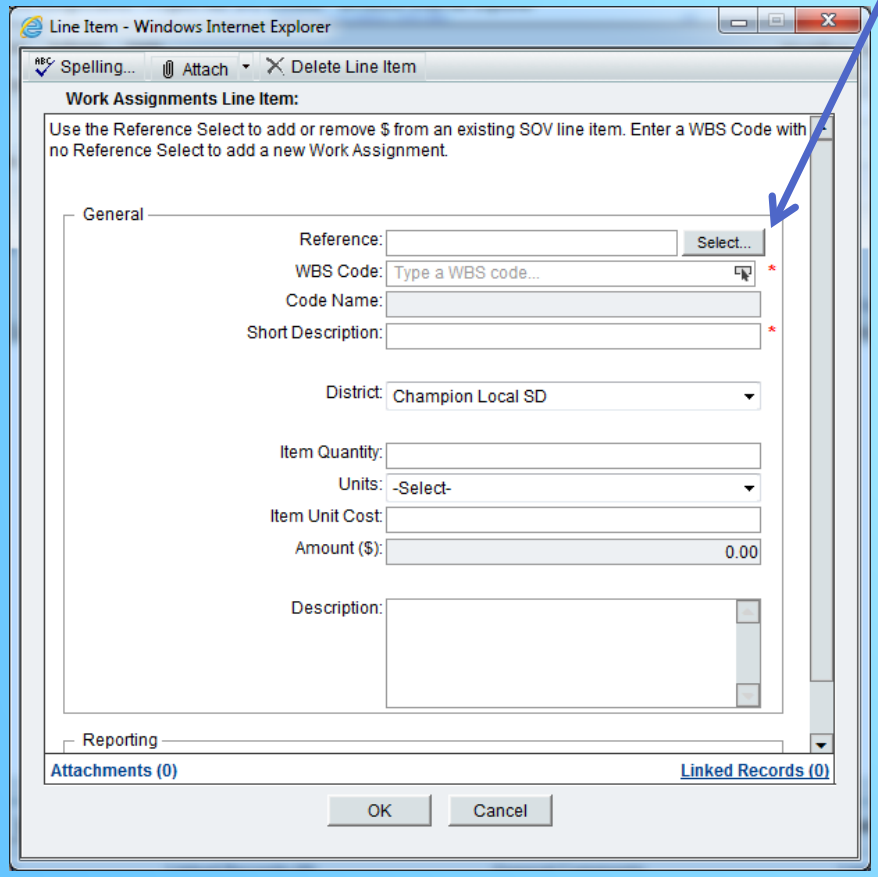
Add information

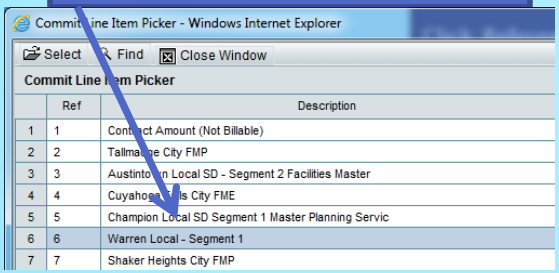


Click: Standard tab
Click :Add

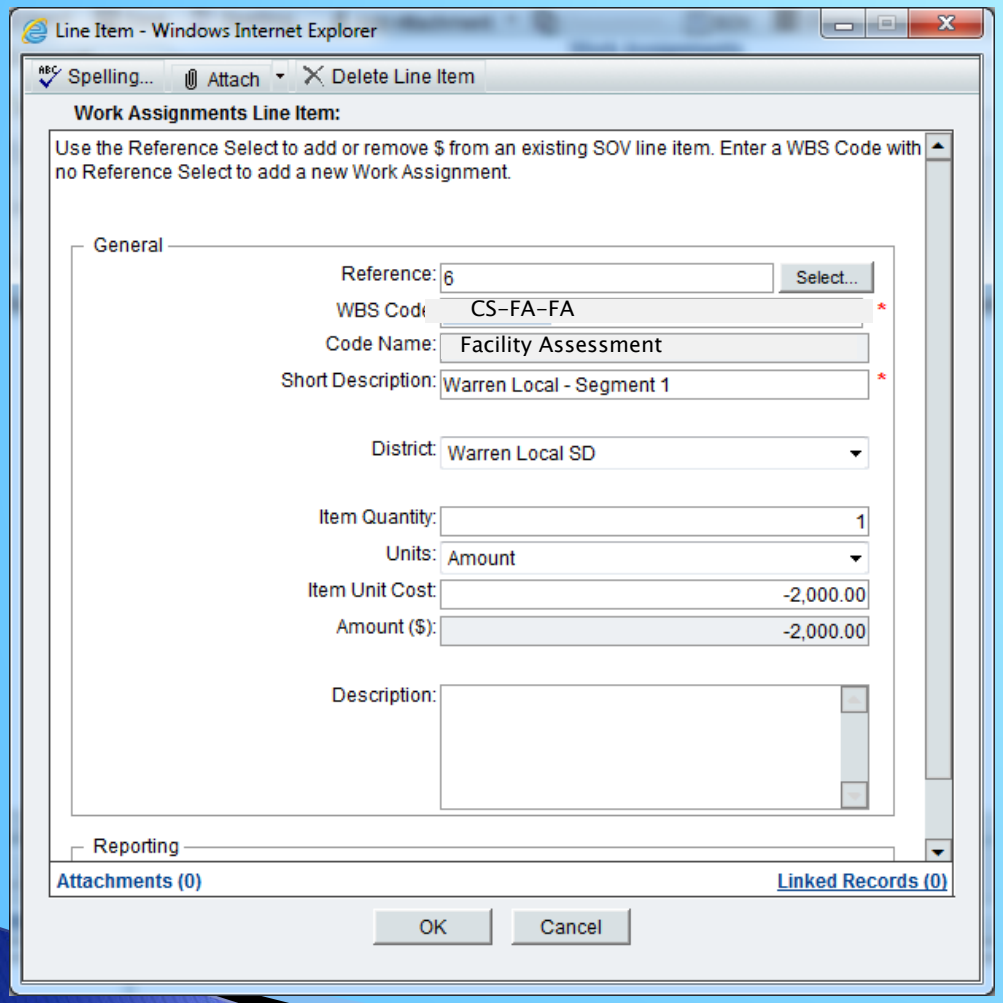
Add information

Click: Reference
Choose line you wish to change
Click: Select





Add information



Sample:
I am taking away 2,000 dollars from the original Work Assignment

Add information

Create New Work Assignments - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General

Work Assignments

Action Details

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
001	CS-FA-FA	Facility Assessment	Warren Local - Segment 1	-2,000.00	Warren Local SD

Add Copy Import Remove Grid Find

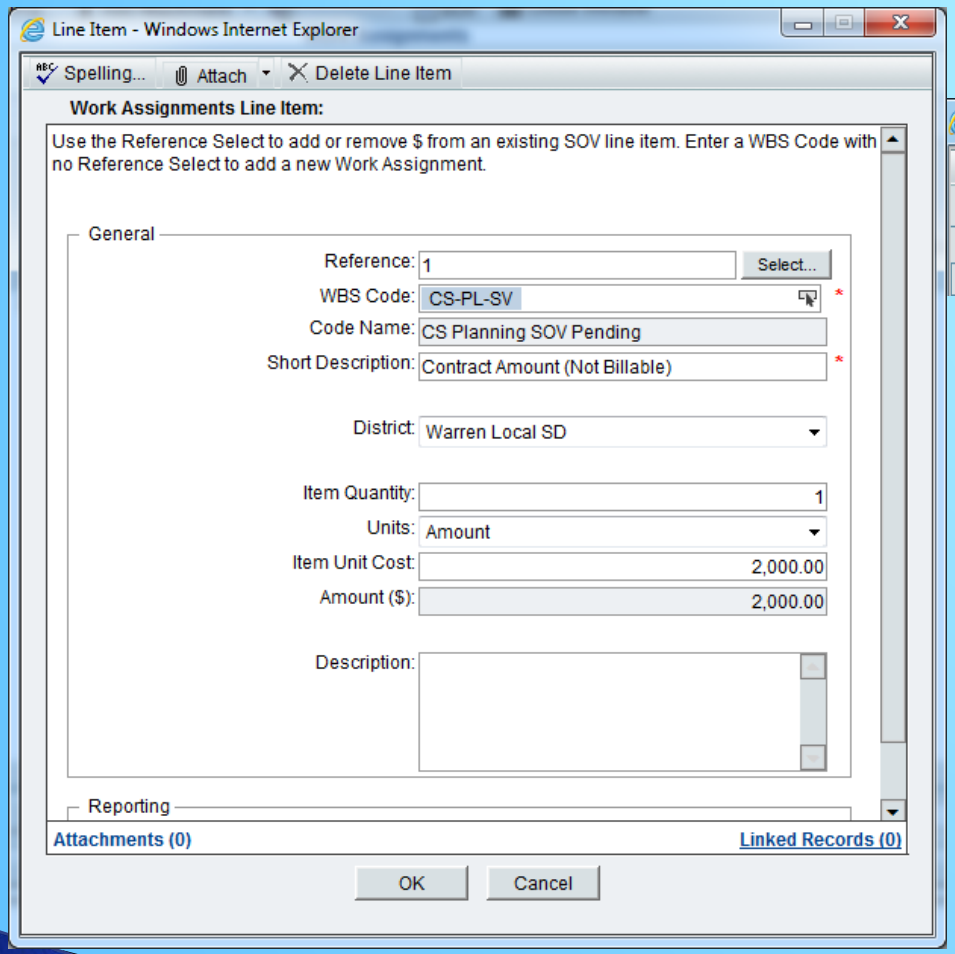
Total Amount: $ -2,000.00

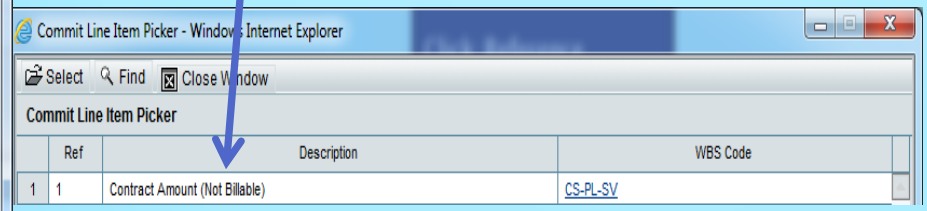
Attachments (0) Linked Records (0) General Comments Linked Mail (0)

In this process, I referenced the original work assignment line that I wanted to change, I deducted 2,000. I will now add the 2,000 back to the original contract line

Add information

Click: Reference
Choose the original Non Billable SOV line
Click: Select





I am adding back to the contract line the 2,000 dollars deducting from the Work Assignment

Complete the remaining fields
Click: OK

Completed Form

Create New Work Assignments - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

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

General

Work Assignments

Action Details

Standard

Current View: All

2 Item(s)

Page 1 of 1

Display 100 items per page

No.	WBS Code	Code Name	Short Description	Amount ($)	District
002	CS-FA-FA	Facility Assessment SOV Pending	Contract Amount (Not Billable)	2,000.00	Warren Local SD
001	CS-FA-FA	Facility Assessment	Warren Local - Segment 1	-2,000.00	Warren Local SD

Add | Copy | Import | Remove | Grid | Find

Total Amount: $ 0.00

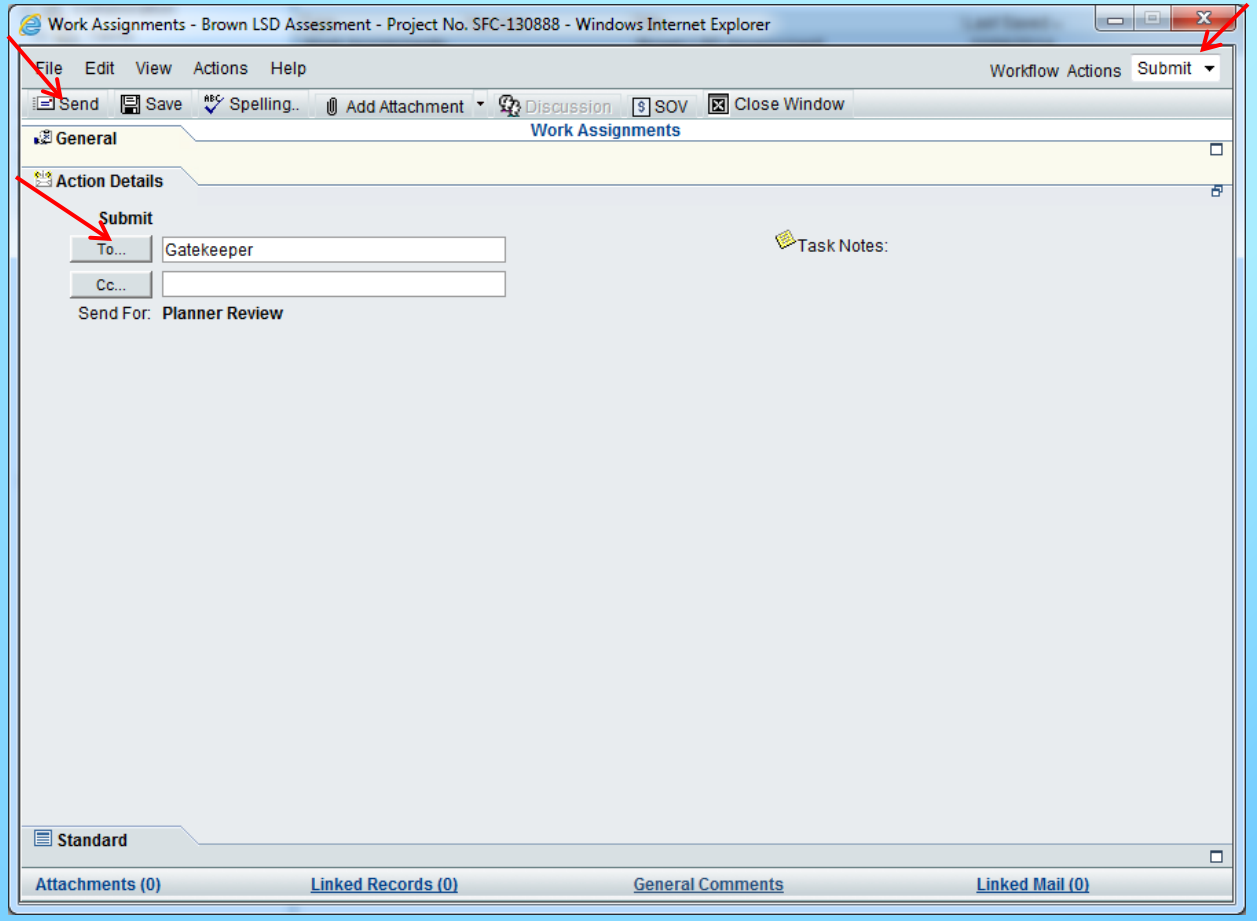
Attachments (0) | Linked Records (0) | General Comments | Linked Mail (0)

Submit Record to Planner

-Choose Workflow Action

-Click To box and choose your Planner contact with OFCC

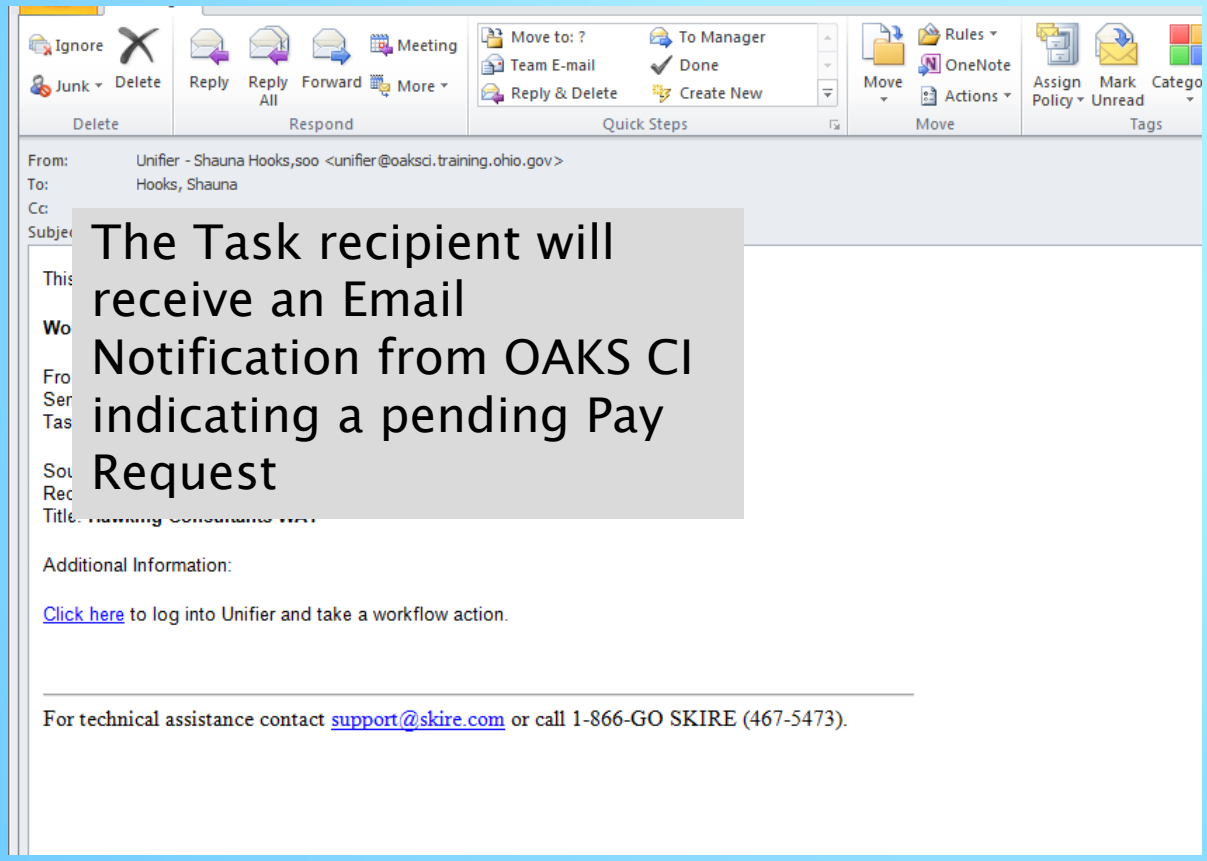
-Click Send



Review Pay Request

You will receive a Task Notification from OAKS CI notifying you of a pending DPE Pay Request

Task Notification



The Task recipient will receive an Email Notification from OAKS CI indicating a pending Pay Request

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 | Agency | Higher Ed

User Mode

- Home
  - Tasks
  - Messages
  - Drafts
  - uMail

File | Edit | View | Help

New | Open | Find

Announcements:

Title: Welcome

Welcome to the OAKS CI Training Environment.

Title: Security Notification

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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
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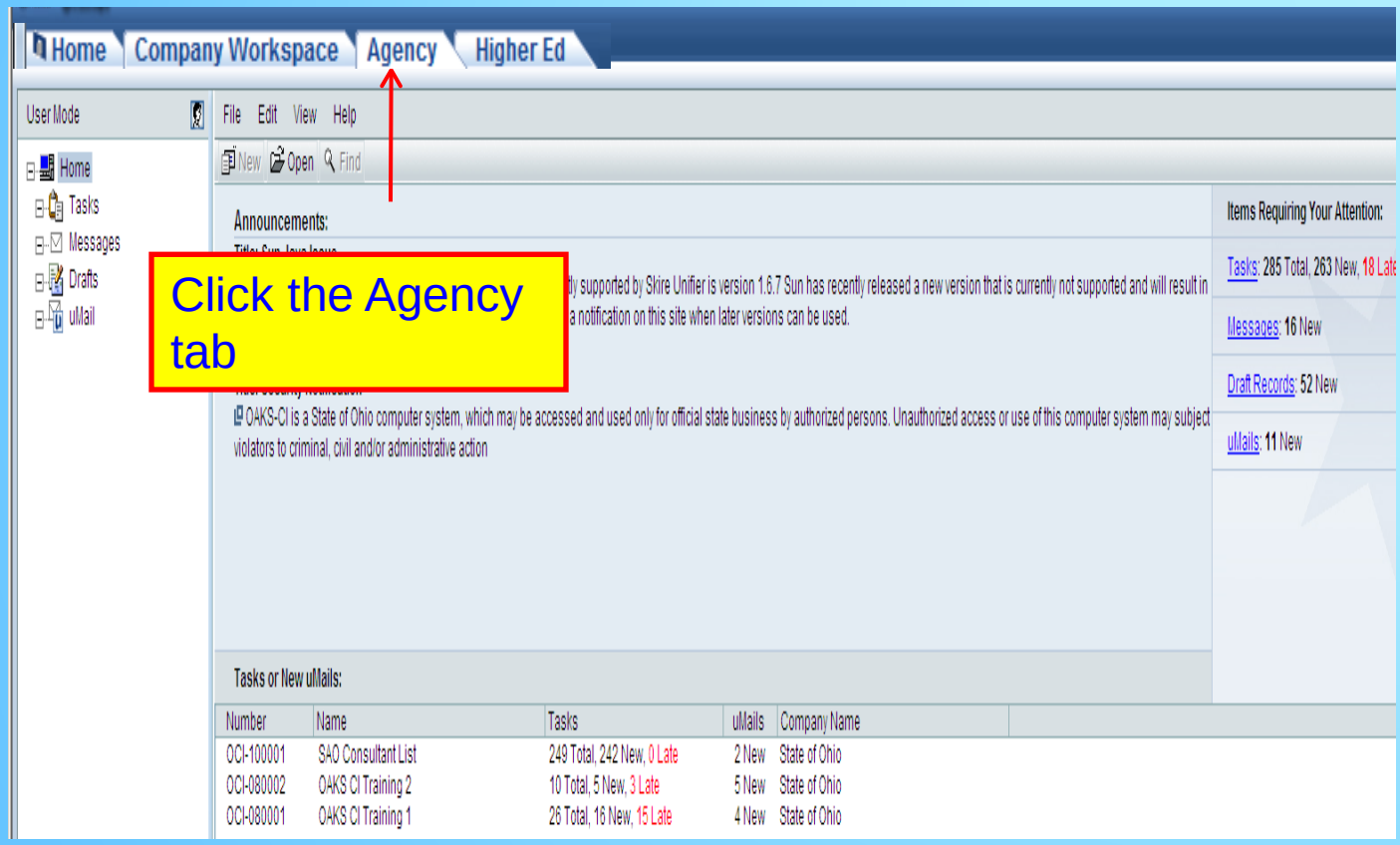
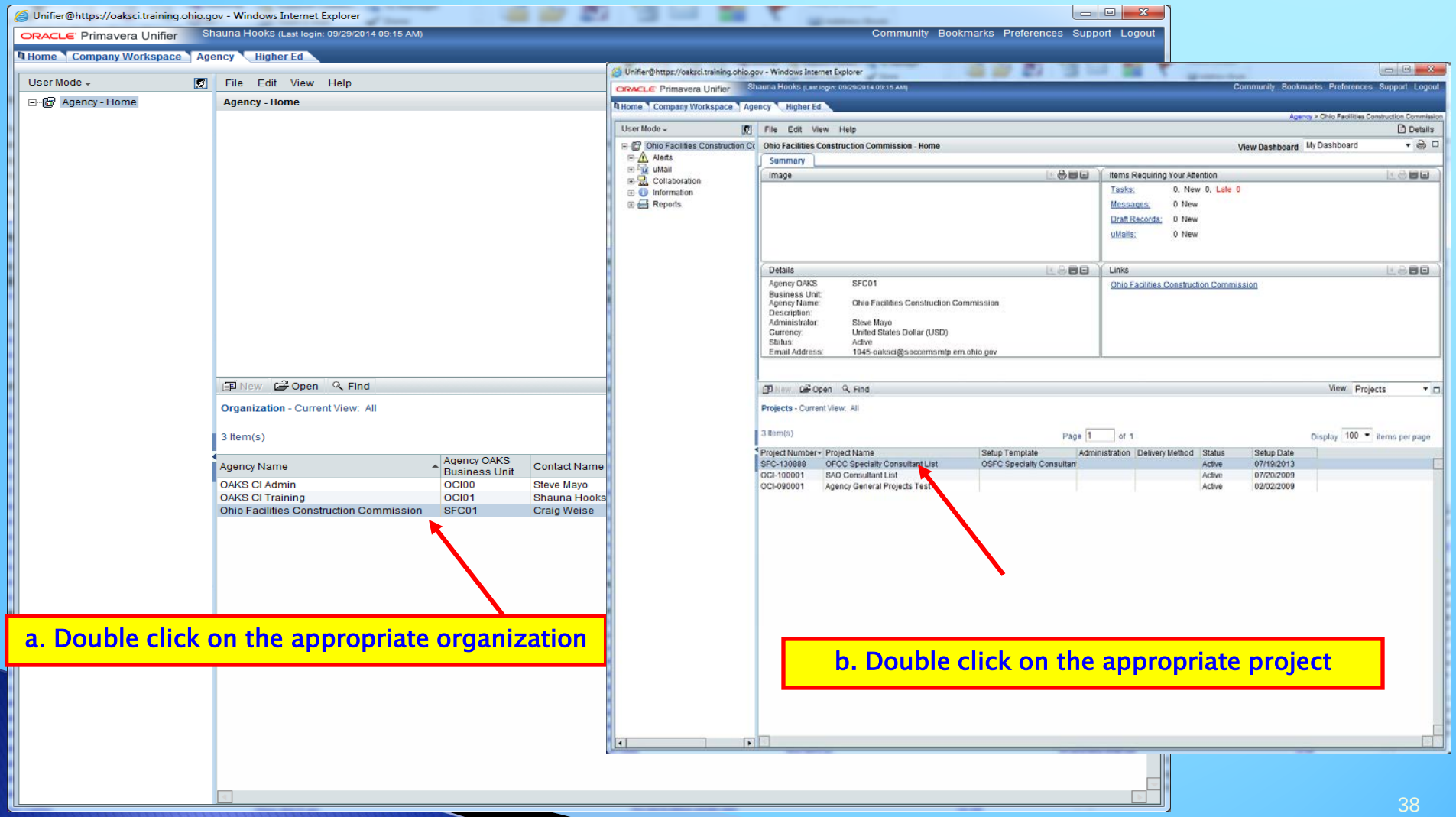
MUN-100001	Miami University Training Project	35 Total, 34 New, 27 Late	1 New	State of Ohio
CLS-110001	Cleveland State Training Project	16 Total, 15 New, 7 Late		State of Ohio

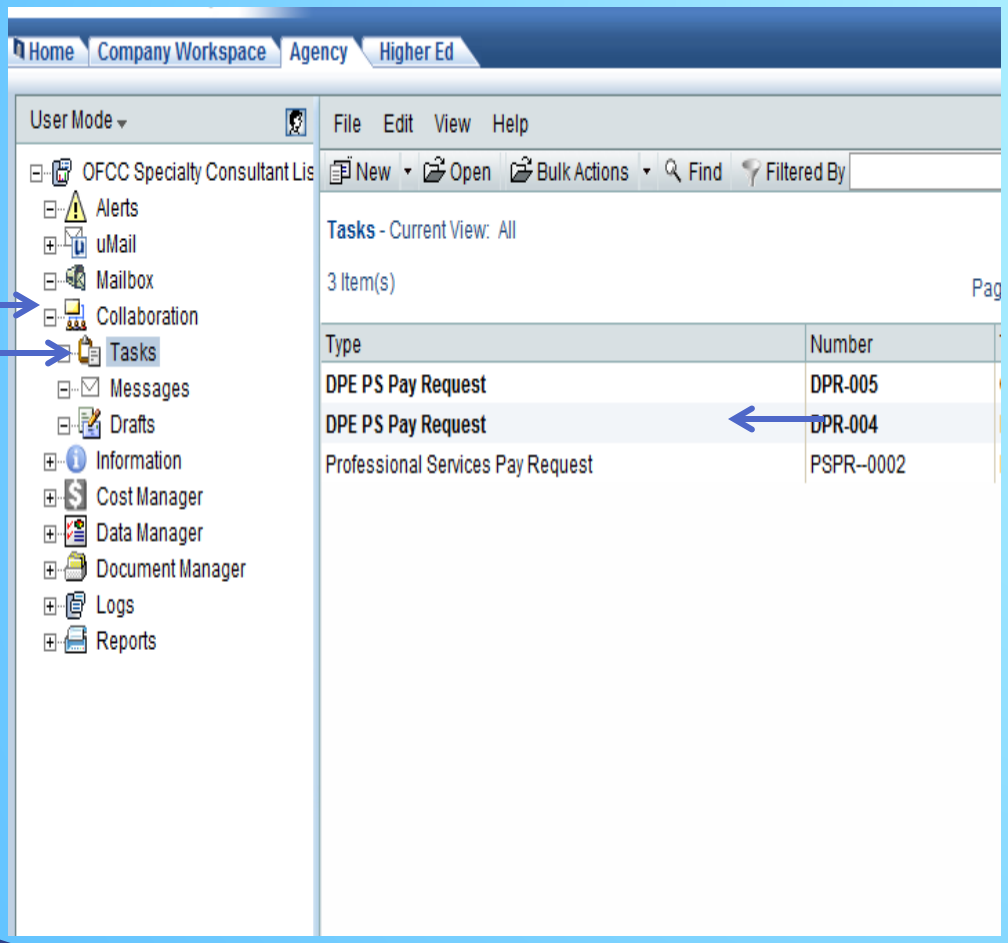
Cross Project Home Page



Getting into your Project



Getting into your Project



Click- Collaboration

Click- Tasks

Double Click on the Task

Reviewing Task

DPE PS Pay Request - Champion LSD PR1 - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Accept Task | Decline Task | SOV | Close Window

General | DPE PS Pay Request

General

Organization:
Project Number: SFC-130888
Project Name: OFCC Specialty Consultant List
Project Location: OFCC
Title: Champion LSD PR1

Record Number: DPR-005
Creator: Shauna Hooks
Creation Date: 10/27/2014 11:53 AM Local (GMT-5)
Status: Pending
Internal Ref. Number:

Task Details

From: Shauna Hooks;
To: Shauna Hooks;
Cc:
Sent For: RPC Approval and Validation

Task Due Date:
Task Status: Not Started
Task Notes (0)

Pay Request Details

Current View: All

Show Currency in: Transaction Currency

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

No.	WBS Code	District	Service Category	Short Description	Amount	% Billed	Item Quantity	Item Co
001	CS-FA-OT	Champion Local SD	Facility Assessment	Champion Elementary	2,000.00	100	1	2

Grid | Find

Total Amount: $ 2,000.00

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

Click- Accept Task

Reviewing Task

DPE PS Pay Request - Champion LSD PR1 - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

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

General

DPE PS Pay Request

Review the pay request to confirm the work has been properly completed. Select the appropriate work flow action and click Send

General

Organization:

Project Number: SFC-130888

Project Name: OFCC Specialty Consultant List

Project Location:

Record Number: DPR-005

Creator: Shauna Hooks

Creation Date: 10/27/2014 11:5

Status:

Action Details

(Click here to view latest content)

To...

Cc...

Send For:

Task Notes:

Pay Request Details

Current View: All

Show Currency in: Transaction Currency

1 Item(s)

Page 1 of 1

Display 100 items per page

No.	WBS Code	District	Service Category	Short Description	Amount	% Billed	Item Quantity	Item Co
001	CS-FA-OT	Champion Local SD	Facility Assessment	Champion Elementary	2,000.00	100	1	2

Add | Copy | Import | Remove | Grid | Find

Total Amount: $ 2,000.00

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

Review lower form

If attached documentation is expected, review it

Reviewing Task

DPE PS Pay Request - Champion LSD PR1 - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions Approve

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

General — DPE PS Pay Request

Review the pay request to confirm the work has been properly completed. Select the appropriate work flow action and click Send.

General

Organization:

Project Number: SFC-130888

Project Name: OFCC Specialty Consultant List

Project Location:

Record Number: DPR-005

Creator: Shauna Hooks

Creation Date: 10/27/2014 11:5

Status:

Action Details

Approve (Click here to view latest content)

To...

Cc...

Send For: Planner Approval

Task Notes:

Pay Request Details

Current View: All

Show Currency i

1 Item(s)

Page 1 of 1

No.	WBS Code	District	Service Category	Short Description	Amount	% Billed	Item Quantity	Item Co
001	CS-FA-OT	Champion Local SD	Facility Assessment	Champion Elementary	2,000.00	100	1	2

Add | Copy | Import | Remove | Grid | Find

Total Amount: $ 2,000.00

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

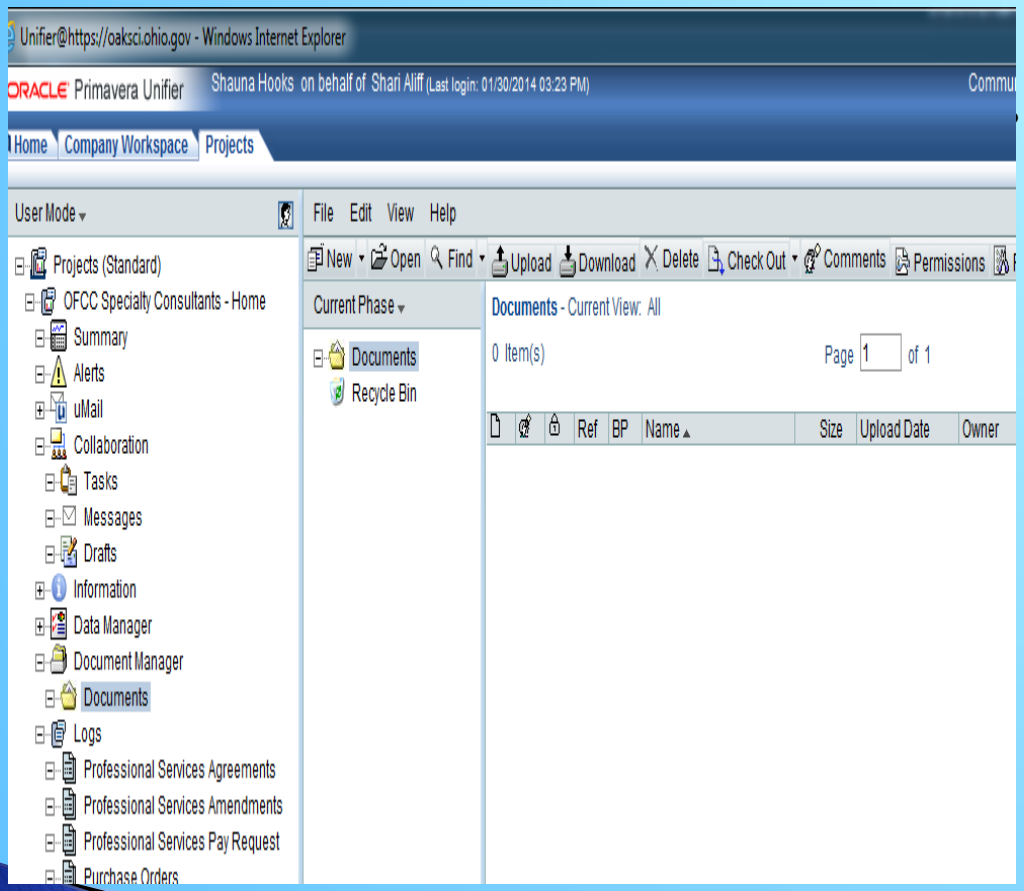
Choose :
Workflow Action: Approve

Click: To box and choose your OFCC Planner contact person

Click: Send

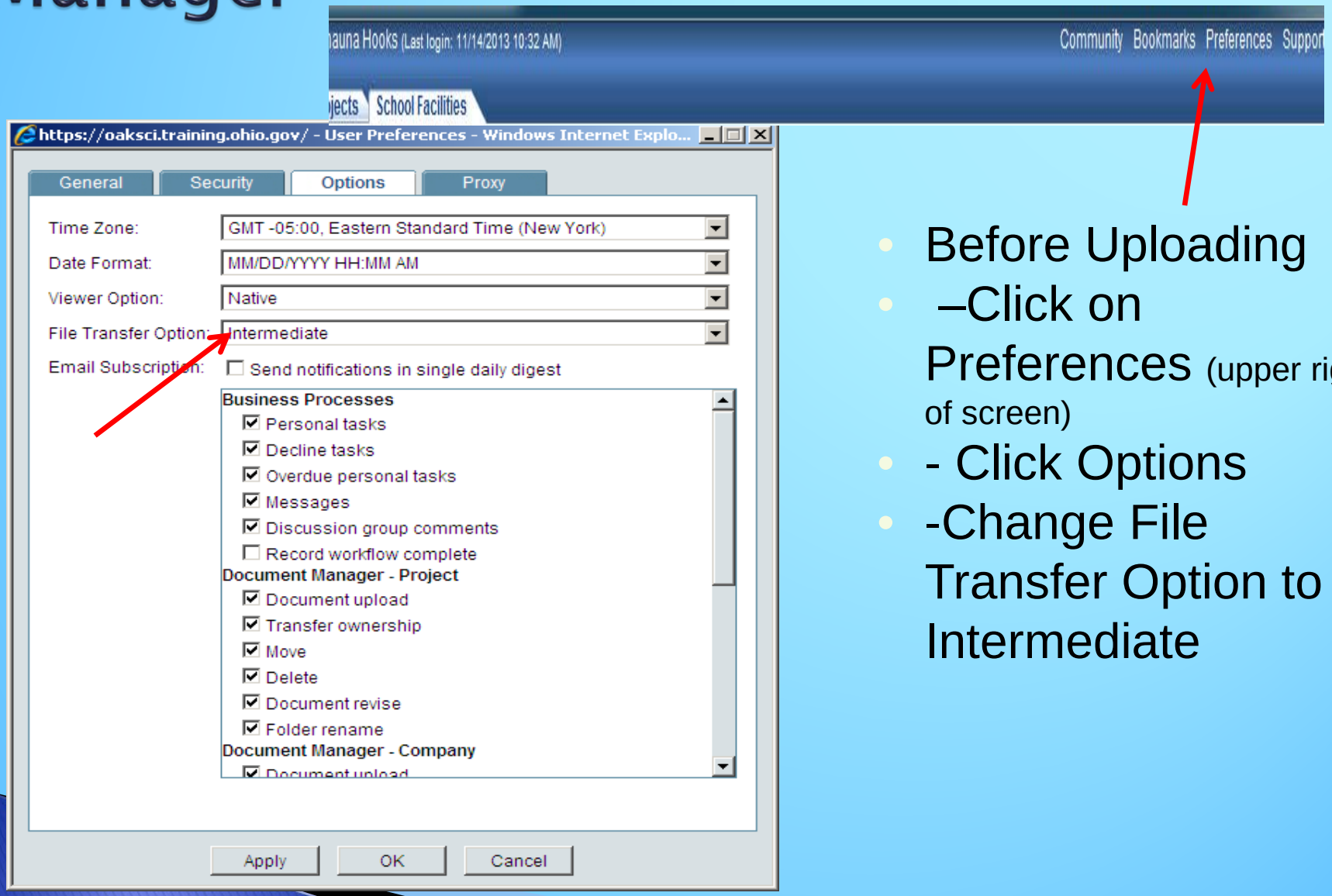
Request for Payment

Supporting Documentation



If you have supporting documentation that must be attached to the pay application it must be uploaded into document manager first, please see slides (14-18)

Before Uploading to Document Manager



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

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

- Central Elementary - Home
  - Alerts
  - uMail
  - Collaboration
  - Information
  - Cost Manager
  - Data Manager
  - Document Manager
  - Logs
  - Reports

File Edit View Help | Details

Central Elementary - Home | View Dashboard | My Dashboard

Summary

Image

Items Requiring Your Attention

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

Details

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

Links

Ohio Facilities Construction Commission

Ohio School Facilities Commission

-Click Document Manager

-Documents

File Upload

(a) Choose folder

(b) Click Upload

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

12/09/2009 - Shauna Hooks

ome | Company Workspace | Projects

ser Mode

- Projects (Standard)
- OAKS CI Training 1 - Home
  - Summary
  - Alerts
  - uMail
  - Collaboration
  - Information
  - Cost Manager
  - Data Manager
  - Document Manager
    - Documents
    - Unpublished Documents
  - Schedule Manager (Basic)
  - Logs
  - Reports

File Edit View Help

New | Open | Find | Upload | Download | Delete | Check Out | Comments | Permissions | Properties

Current Phase

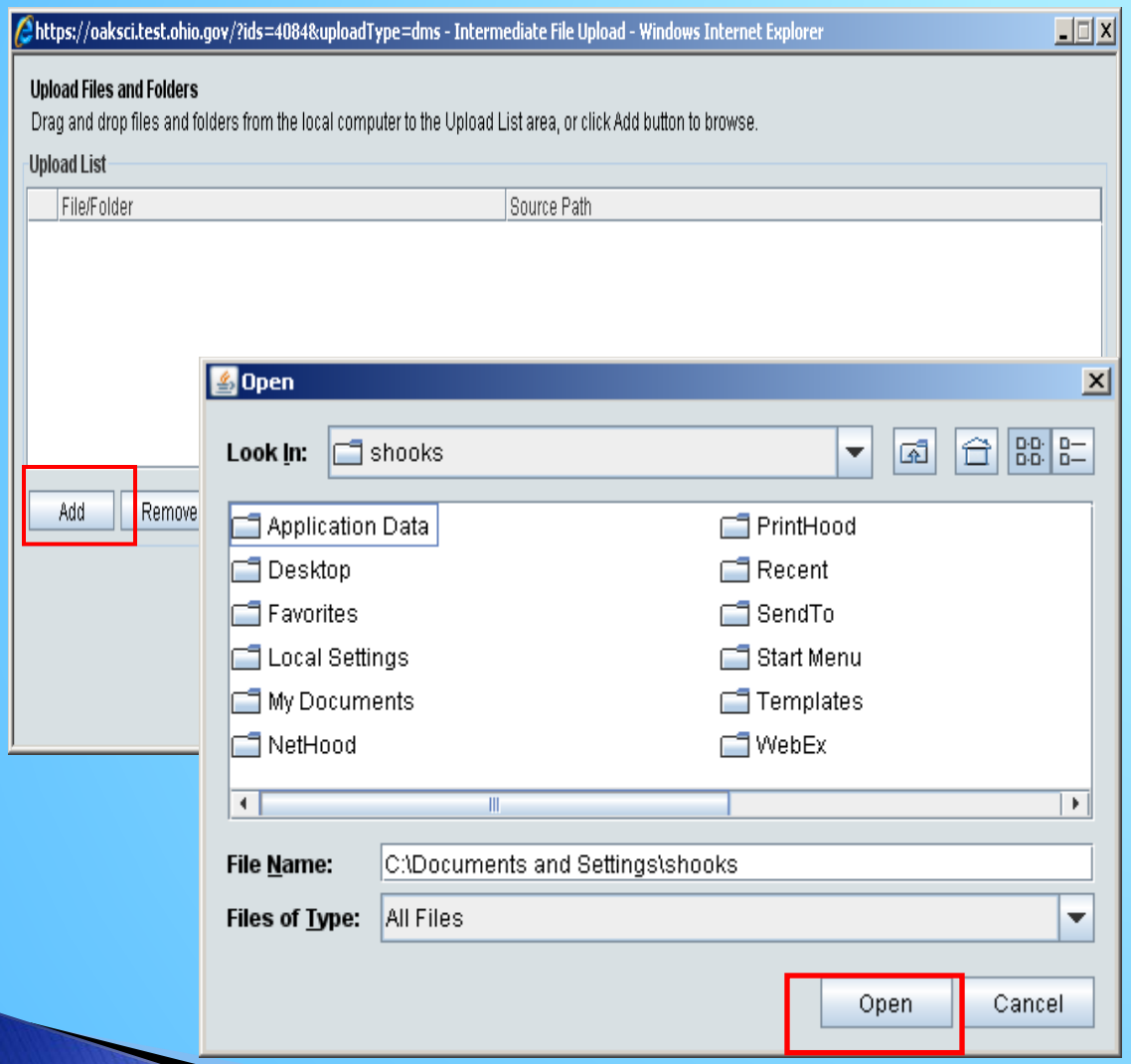
- Documents
  - 0000 Concept Develo
  - 0100 Acquisition
  - 0200 Design
    - 0210 Program Verif
      - Drawings PDF
        - Arch
        - Civil
        - mep
        - Stru
        - dfhsdhh
      - Preliminary Descr
      - Probable Cost
      - Schedule

Arch - Current View: All

20 Item(s)

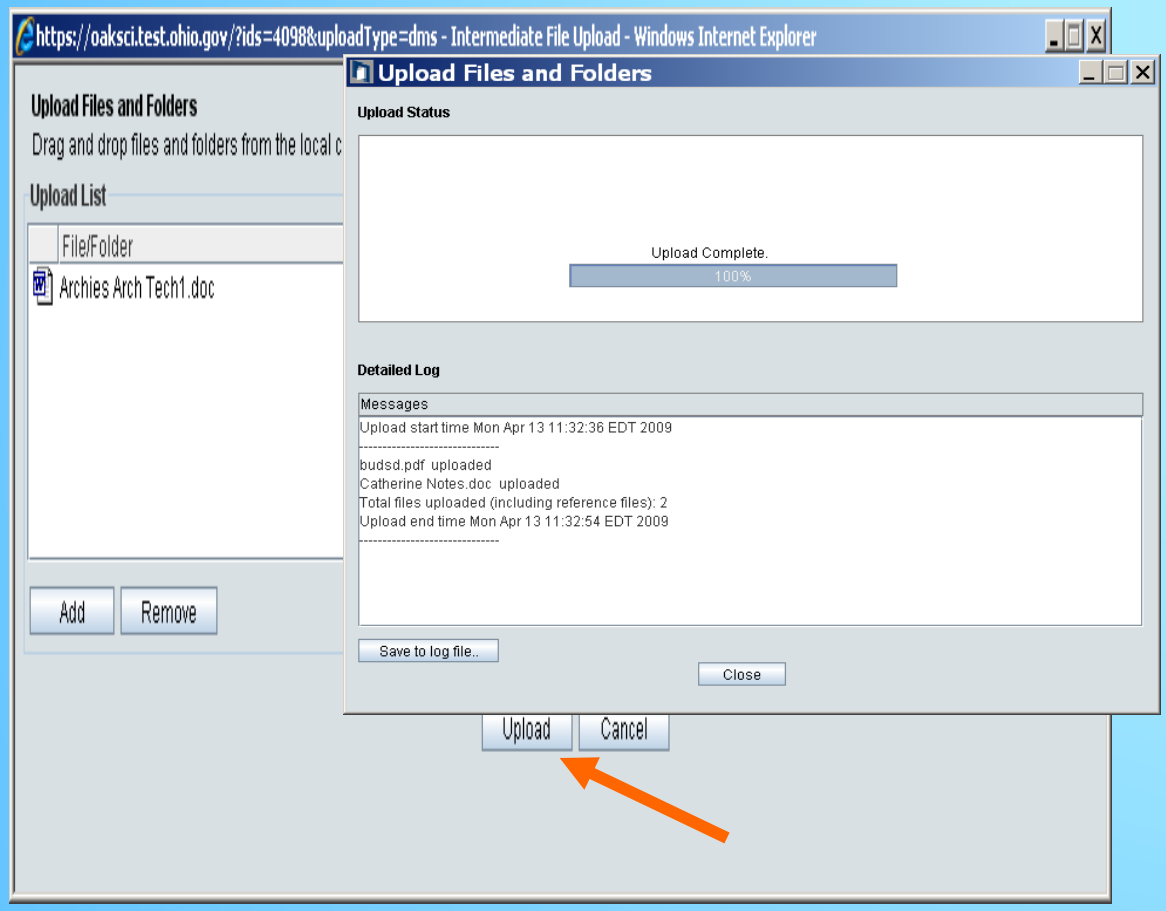
Ref	BP	Name	Size	Upload Date	Owner	Title
		A-1CONFORMED.pdf	397 KB	03/13/2008	Oaks Student 1	
		A1-1.pdf	561 KB	03/13/2008	Oaks Student 1	
		A2-1.pdf	708 KB	03/13/2008	Oaks Student 1	
		A2-2.pdf	1017 KB	03/13/2008	Oaks Student 1	
		A3-1.pdf	443 KB	03/13/2008	Oaks Student 1	
		A4-1.pdf	539 KB	03/13/2008	Oaks Student 1	
		A5-1.pdf	327 KB	03/13/2008	Oaks Student 1	
		A5-2.pdf	448 KB	03/13/2008	Oaks Student 1	
		A7-1.pdf	415 KB	03/13/2008	Oaks Student 1	
		A8-1.pdf	622 KB	03/13/2008	Oaks Student 1	
		A9-1.pdf	377 KB	03/13/2008	Oaks Student 1	

File Upload



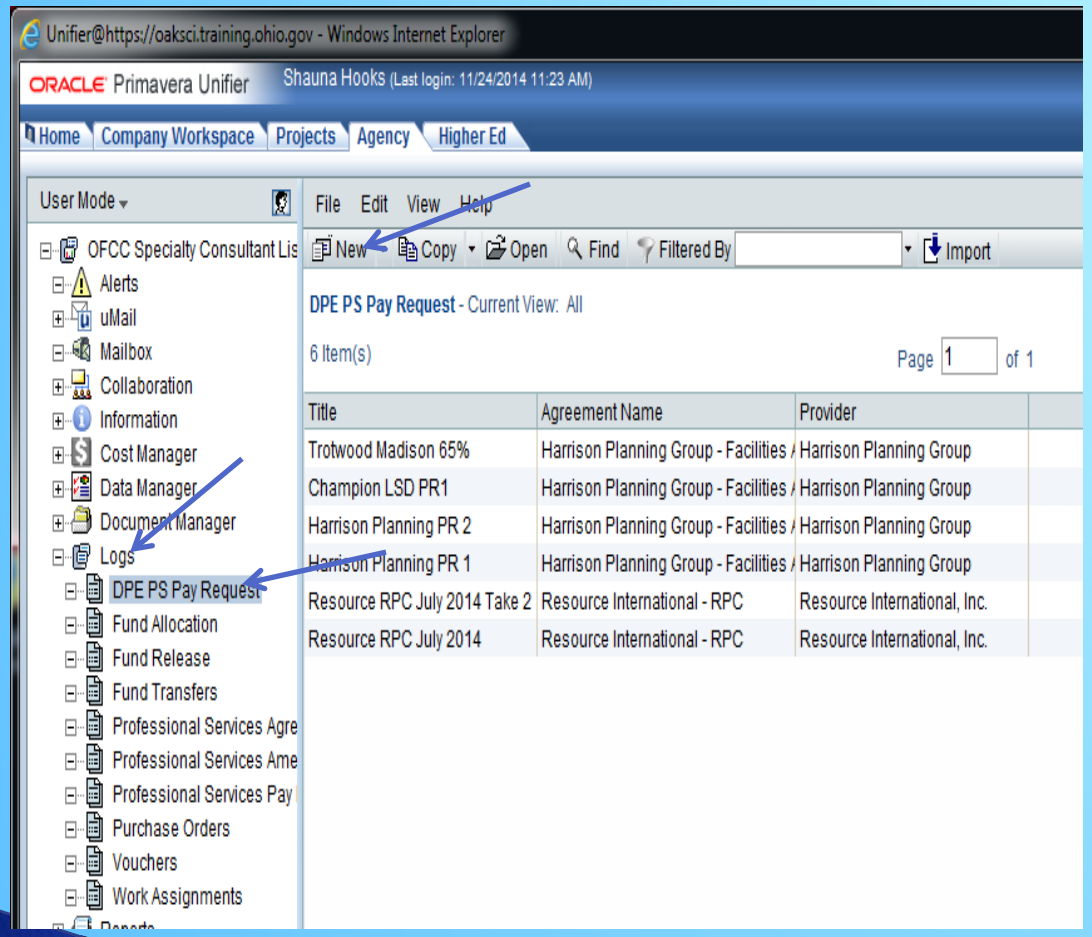
- Click Add
- Choose document or folder to upload
- Click Open

File Upload



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

Payment Request



- Log into your project (see page 6)
- Click Logs
- DPE PS Pay Request
- Click New

Payment Request

Create New Professional Services Pay Request - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

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

General

Professional Services Pay Request

General

Organization:		Record Number:	
Project Number:	SFC-130888	Creator:	Shauna Hooks
Project Name:	OFCC Specialty Consultant List	Creation Date:	
Project Location:	OFCC	Status:	
Title:	*	Internal Ref. Number:	
Contract Reference:	Select... *	Professional Services Provider:	
Agreement Type:		EDGE Certified Sub?:	
Other Description:		Received Date:	
Period From:	*	Period To:	*

Professional Services Provider Address

Vendor:	Select... *
Address Line 1:	
Address Line 2:	
City:	
State:	-Select-
ZIP:	

Complete all available Fields

Action Details

Pay Request Details

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

Payment Request

Create New Professional Services Pay Request - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

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

General

Professional Services Pay Request

Contract Reference: Consultant Name-Project N Select... *

Professional Services Provider: Amazing Architectural Inc.

Agreement Type: Study

EDGE Certified Sub?: No

Other Description:

Received Date:

Period From: 07/01/2013 05:00 PM Local (GM *

Period To: 07/31/2013 05:00 PM Local (GM *

Professional Services Provider Address

Vendor: Amazing Architectural Inc. Select... *

Address Line 1: 3131 Main St

Address Line 2:

City: Columbus

State: Ohio

ZIP: 43215

Complete available fields
Click the Pay Request Details Tab

Payment Requested

Final Payment?: No *

Amount ($): 2,500.00 *

Invoices for [illegible]ursable Exp. Attached?: No

Line Item Total ($): 0.00

Difference ($): 2,500.00

Notes:

Action Details

Pay Request Details

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

Payment Request

Create New Professional Services Pay Requ

File Edit View Actions Help

Send Save Spelling.. Add At

General

Action Details

Pay Request Details

Current View: All

0 Item(s)

No.	WBS Code	Code Name

Click Add

Add Copy Import Re

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

Line Item - Windows Internet Explorer

Spelling... Attach Delete Line Item

DPE PS Pay Request Line Item:

Use the WBS Code select to identify the Work Assignment related to this payment then enter the details. You may import records from a spreadsheet.

Click Arrow

General

WBS Code: Type a WBS code... *

Code Name:

District: -Select- *

Service Category: -Select- *

Work Assignment:

Short Description: *

Item Quantity: *

Item Unit Cost: *

Percent Billed This Request: 100

Amount ($): 0.00

Professional Services EDGE Certified?:

Subcontractor/Supplier: Select...

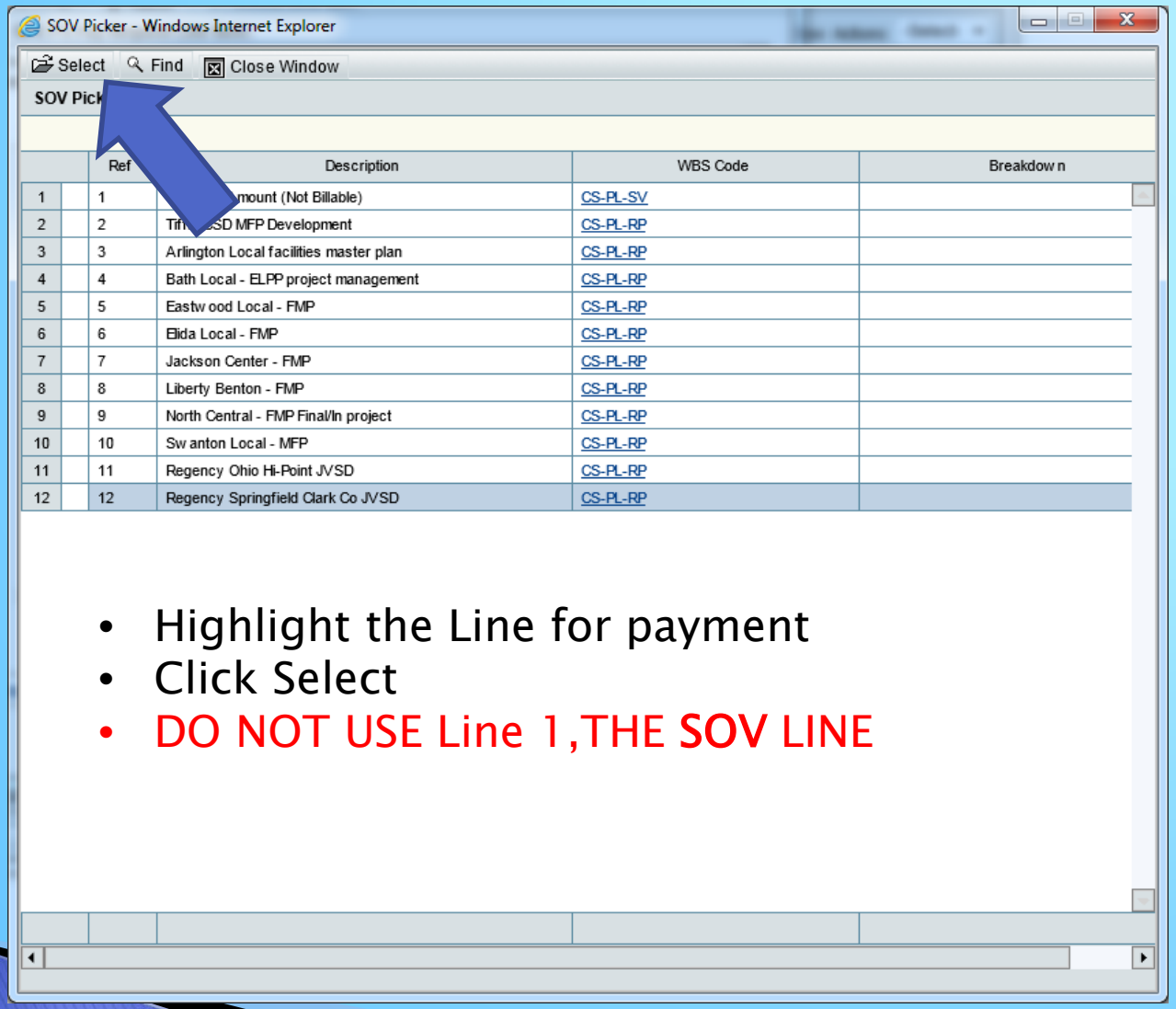
EDGE Certified Sub?:

Notes:

Attachments (0) Linked Records (0)

OK Cancel

Payment Request



- Highlight the Line for payment
- Click Select
- DO NOT USE Line 1,THE SOV LINE

Payment Request

Line Item - Windows Internet Explorer

Spelling... Attach Delete Line Item

DPE PS Pay Request Line Item:

Use the WBS Code select to identify the Work Assignment related to this payment then enter the details. You may import records from a spreadsheet.

General

WBS Code:	CS-PL-RP *
Code Name:	CS Regional Planning Service
District:	Springfield Local SD (Lucas) *
Service Category:	Assess Quality Control *
Work Assignment:	
Short Description:	John Brown *
Item Quantity:	10 *
Item Unit Cost:	75.00 *
Percent Billed This Request:	100
Amount ($):	750.00
Professional Services EDGE Certified?:	
Subcontractor/Supplier:	Select...
EDGE Certified Sub?:	
Notes:	

Attachments (0) Linked Records (0)

OK Cancel

- Pull in District
- Pull in Service Category
- Type in a Short Description
- Example (John Brown)
- Type in Item Quantity (hours)
- Type in Unit Cost(hourly rate)
- Type in Percent Billed
- Click Ok

Payment Request

Create New DPE PS Pay Request - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

Send | Save | Spelling.. | Add Attachment | Discussion | SOV

General

DPE PS Pay Request

General

Organization: Ohio Facilities Construction Commiss

Project Number: SFC-130888

Project Name: OFCC Specialty Consultants

Project Location: Various

Title: Bob's Planning PR1 *

Intern

Continue to add lines as necessary

Action Details

Create New DPE PS Pay Request

To...

Cc...

Send For:

Task Notes:

Pay Request Details

Current View: All

1 Item(s)

Page 1 of 1

Display 100 items per page

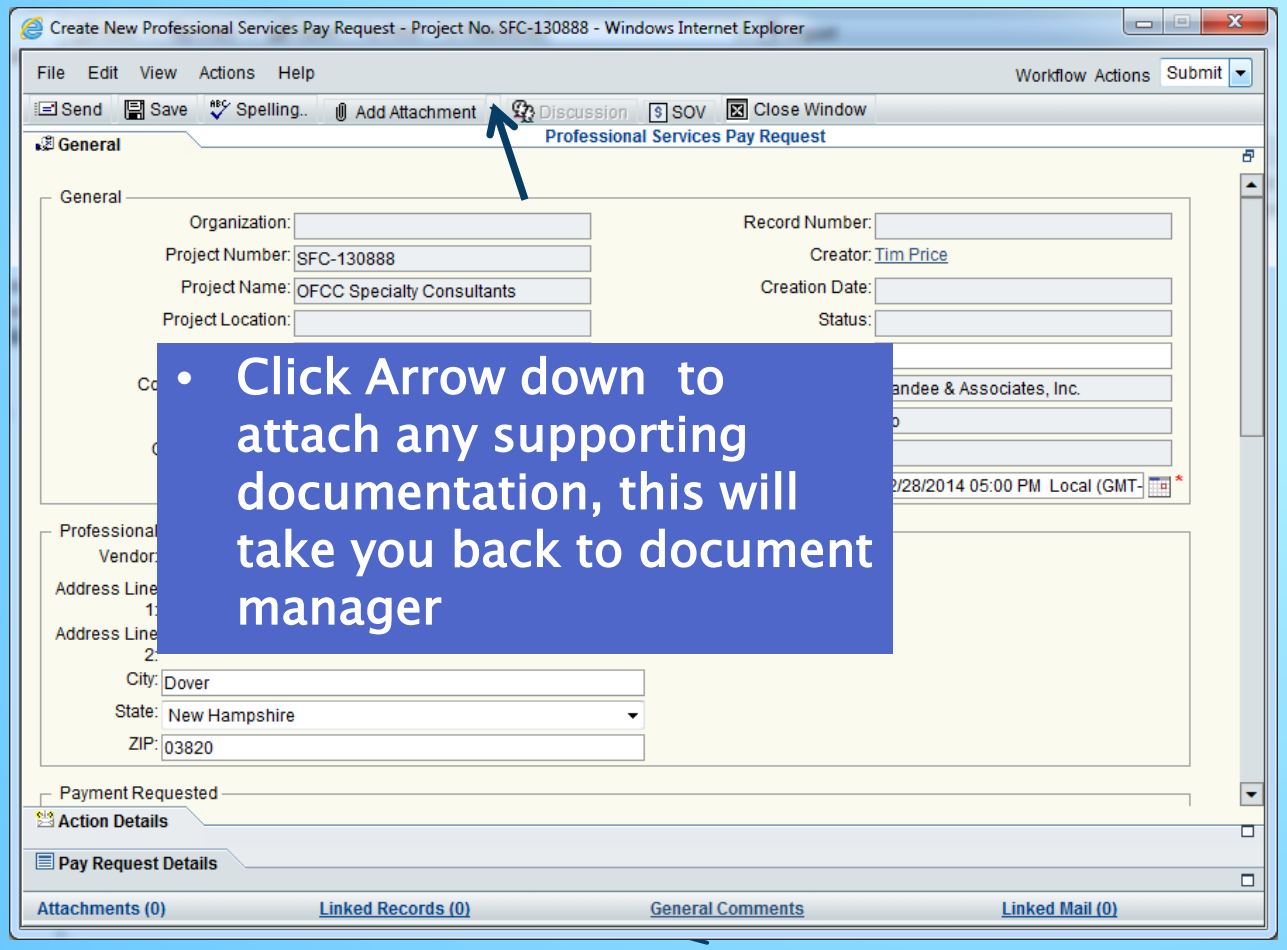
No.	WBS Code	District	Service Category	Short Description	Amount	% Billed	Item Quantity	Item Co
001	CS-PL-RP	Springfield Local SD (Luca	Assess Quality Control	John Brown	750.00	100	10	

Add | Copy | Import | Remove | Grid | Find

Total Amount: $ 750.00

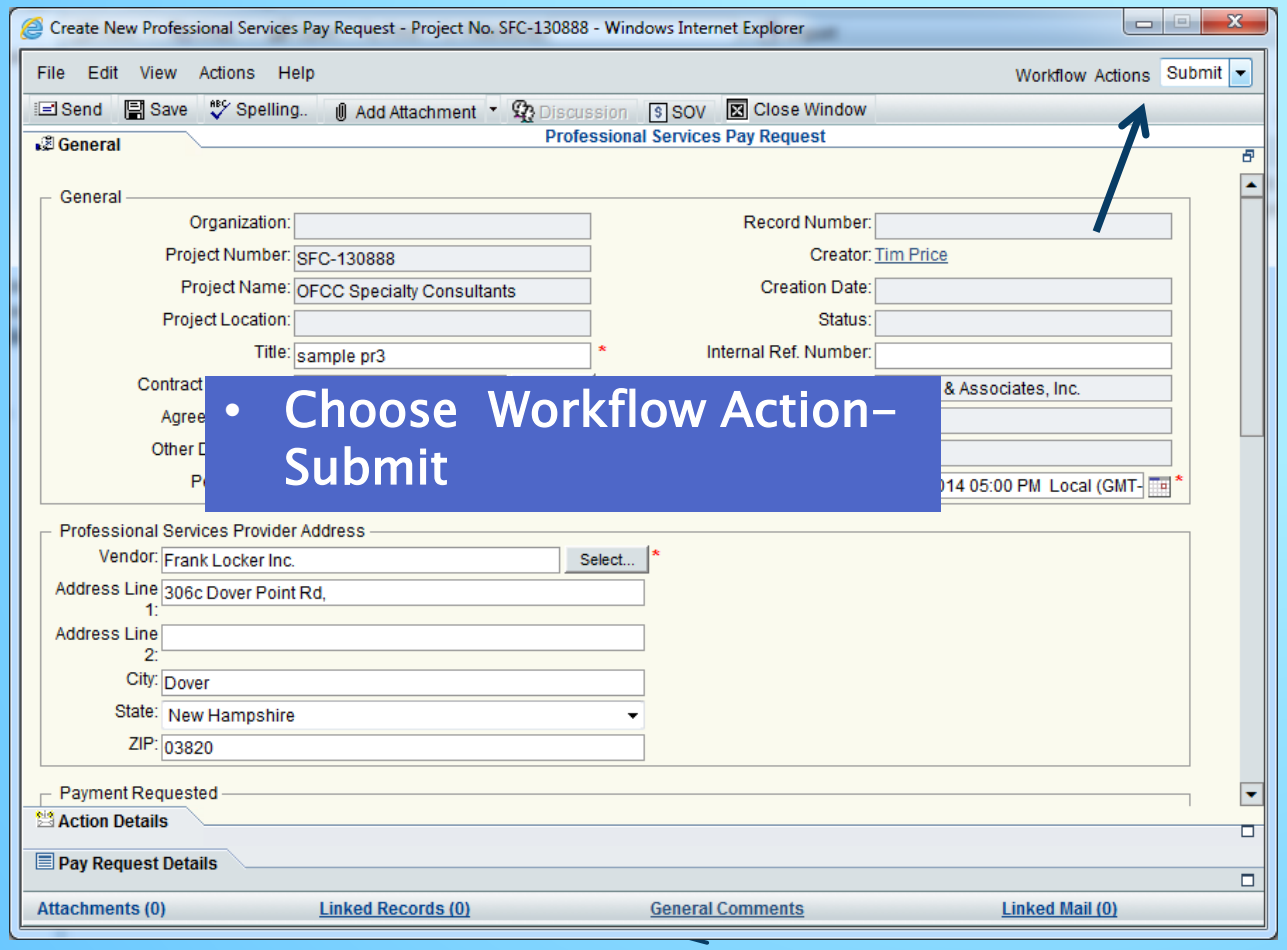
Attachments (0) | Linked Records (0) | General Comments | Linked Mail (0)

Payment Request



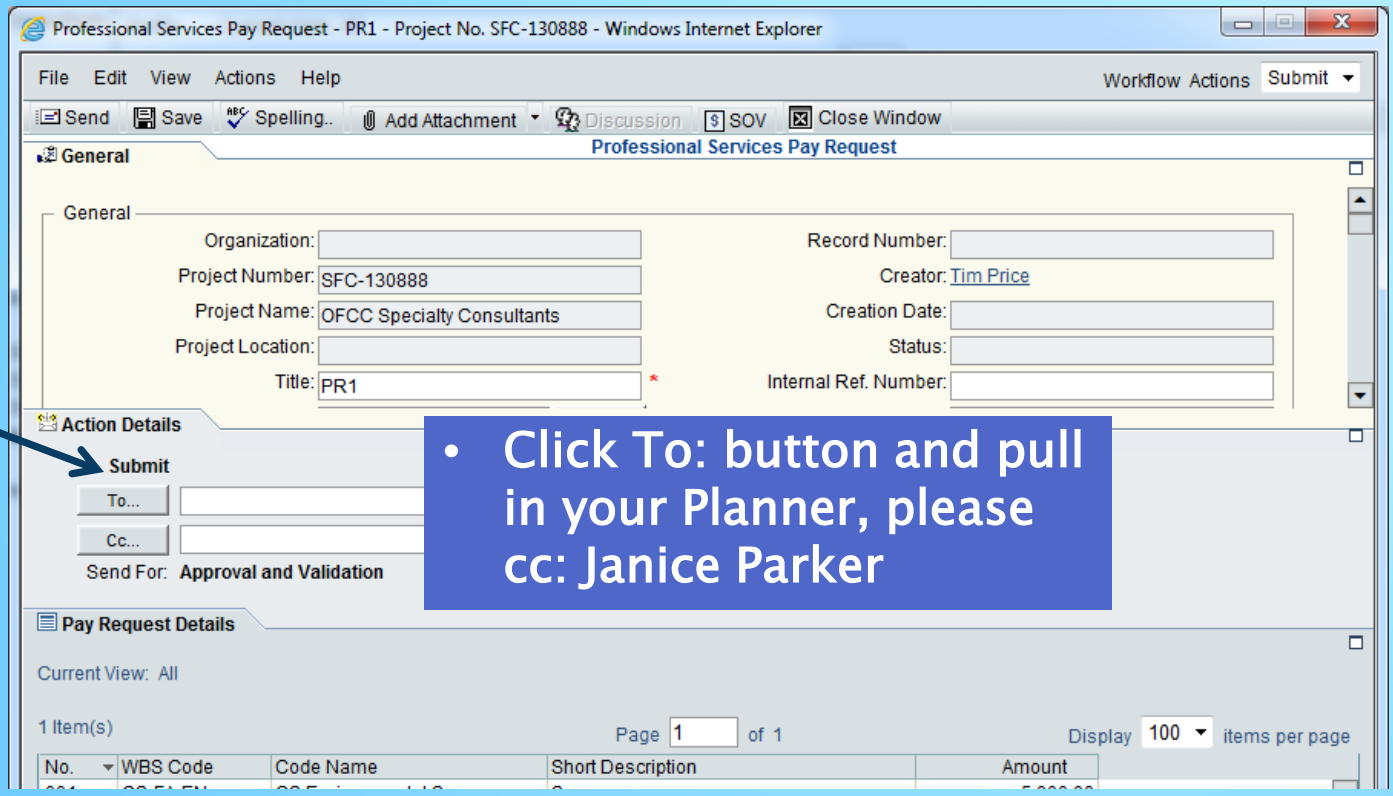
- Click Arrow down to attach any supporting documentation, this will take you back to document manager

Payment Request



- Choose Workflow Action– Submit

Payment Request



- Click To: button and pull in your Planner, please cc: Janice Parker

Payment Request

Professional Services Pay Request - PR1 - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions Submit

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

General

Professional Services Pay Request

- Click Send

Project Number: SFC-130888

Project Name: OFCC Specialty Consultants

Project Location:

Title: PR1 *

Record Number:

Creator: Tim Price

Creation Date:

Status:

Internal Ref. Number:

Action Details

Submit

To... Karen Kirk

Cc...

Send For: Approval and Validation

Task Notes:

Pay Request Details

Current View: All

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

No.	WBS Code	Code Name	Short Description	Amount
001	CS-FA-EN	CS Environmental Survey	Sur	5,000.00

Add | Copy | Import | Remove | Grid | Find

Total Amount: $ 5,000.00

Attachments (1) | Linked Records (0) | General Comments | Linked Mail (0)

Need Help?

Call OAKS CI
614.644.2211

or

Email:
OAKSCI@OFCC.Ohio.gov