



Cloud Navigation

Job Aids

- ▶ For additional reference materials visit our website ofcc.ohio.gov
- ▶ Click: Resources –> OAKS CI –> Agency/Higher Ed Training –> Choose Job Aid

The image shows two overlapping screenshots of the OFCC website. The background screenshot shows the main navigation menu with 'Resources' highlighted. A dropdown menu is open under 'Resources', and 'OAKS CI' is selected. A red arrow points from the 'OAKS CI' menu item to the foreground screenshot. The foreground screenshot shows the 'OAKS CI Training Opportunities (Agency/Higher Education)' page. It features a table of training opportunities with columns for 'Title', 'Recorded Presentation', and 'Training Guide'.

Title	Recorded Presentation	Training Guide
Configure Computer to Use OAKS CI		
Introduction to OAKS CI*		
Introduction to Cloud Navigation		
Document Manager		
Custom Prints		

Using OAKS CI in the Cloud

- ▶ OAKS CI is now housed in a cloud-based system at the following URL:
 - <https://ohio-unifier.oracleindustry.com>
- ▶ Passwords for OAKS CI are now housed in a separate system called Oracle Identity Manager (OIM) which can be accessed here:
 - <https://ohio-oim.oracleindustry.com/oim>

Agenda

In the following presentation we will discuss:

- Using OIM to manage your OAKS CI password (Pages 5–6)
- Navigating OAKS CI (Page 7–16)
 - Navigating to Your Project (7–10)
 - Collaboration: Tasks, Messages, Drafts (11–15)
 - Logs: Business Processes (16)
- Records (17)
- Document Manager (30)

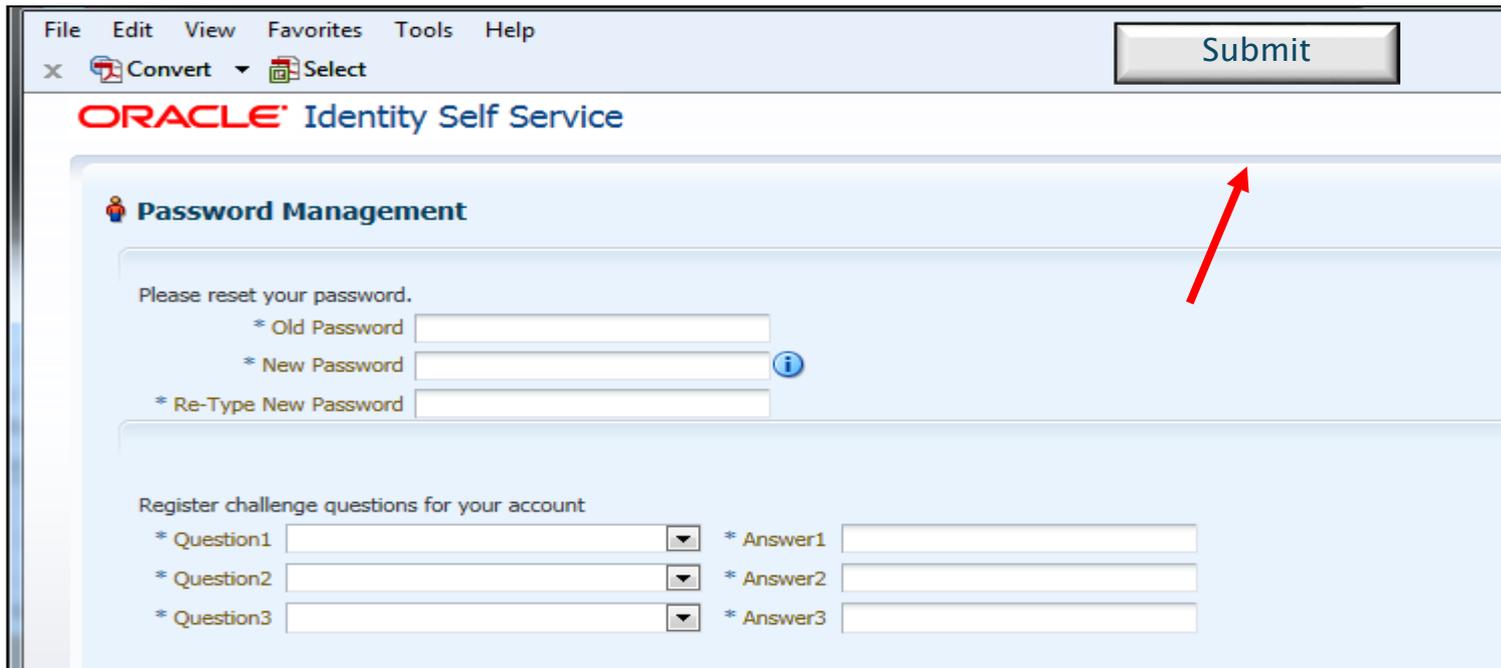
Oracle Identity Manager (OIM)

- ▶ To reset your password or to set your security questions, login to the OIM website:
<https://ohio-oim.oracleindustry.com/oim>
- ▶ Type in your Username and Password. This is the same as the login information you use for accessing OAKS CI.
- ▶ Click “Sign In”



Oracle Identity Manager (OIM)

- ▶ Once logged in, the system will prompt you to reset your password (if this is your first log in) and set your security questions
- ▶ Please be aware that your password will expire every 60 days and the system will not send you a reminder.
- ▶ Type in requested information and Click “Submit”. Then Click “Sign Out” to log out of OIM



The screenshot shows a web browser window with the Oracle Identity Self Service interface. The browser's address bar shows 'Convert' and 'Select' tabs. The page title is 'ORACLE Identity Self Service'. The main content area is titled 'Password Management' and contains the following fields:

- Please reset your password.
- * Old Password
- * New Password ⓘ
- * Re-Type New Password

Below these fields is a section titled 'Register challenge questions for your account' with the following fields:

- * Question1 ▼ * Answer1
- * Question2 ▼ * Answer2
- * Question3 ▼ * Answer3

A red arrow points to the 'Submit' button in the top right corner of the page.

Note: You will only utilize this site to change your password. No other OAKS CI functions will take place here.

Navigate to OAKS CI

- ▶ Open any web browser

Note: While testing we found that Google Chrome works best for us

- ▶ Navigate to: <https://ohio-unifier.oracleindustry.com>

- ▶ Enter your assigned Username and Password

- ▶ Click “Login”

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



Cross Project Home Page

The screenshot shows the Oracle Primavera Unifier interface. At the top, the browser address bar displays <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page header includes the Oracle Primavera Unifier logo, the user name Shauna Hooks, and options for Help and Sign Out. The navigation bar shows tabs for Home, Projects, Program, Agency, and Higher Ed. A search bar is located below the navigation bar. The main content area is divided into sections: Announcements, Tasks or New uMails, and a summary of tasks and uMails. The Announcements section contains two messages: 'Unifier Outage' and 'Draft Pay Request Issue'. The Tasks or New uMails section contains a table with columns for Project Number, Name, Tasks, uMails, and Company Name. The table lists several projects with their respective task and uMail counts. Red arrows point to the 'Higher Ed' tab, the 'Announcements' section, and the 'Tasks' column of the table. Red boxes highlight the text 'Cross project tabs', 'Announcements', and 'Projects with Active Tasks'.

ORACLE PRIMAVERA UNIFIER Last login: 02/11/2015 07:21 AM Shauna Hooks Help Sign Out

Home Projects Program Agency Higher Ed

Navigate To...

Home Tasks Messages Drafts uMail

File Edit View Help

New Open Find

Announcements:

Title: Unifier Outage
OAKS CI will shutdown at 5PM on Friday January 30th for System Maintenance. The system will be available on Saturday morning.

Title: Draft Pay Request Issue
Contractors have been experiencing the loss data in the lower form of the pay application when it is stored as a draft prior to submission. We are currently working with Oracle to resolve this issue. In the interim we have found that one work around is to create your pencil copy (draft) pay application, submit it to the A/E and have them return for clarification back to you. Doing this seems to keep current and future data from disappearing. If you have an issue with your lower form disappearing, please contact the OAKS CI support desk immediately so that we may escalate the issue. Please contact us with any questions or concerns at 614.644.2211 or oaksci@ofcc.ohio.gov.

Tasks or New uMails:

Project Number	Name	Tasks	uMails	Company Name
OCI-080001	Agency General Projects Test	25 Total, 11 New, 6 Late	5 New	State of Ohio
DMR-090010	Various Improvements, Tiffin & Northw		2 New	State of Ohio
DAS-100002	North High Complex - Phase 4		1 New	State of Ohio
DRC-050074	Lebanon Dietary Phase 2 -Food Prep		10 New	State of Ohio
DYS-990225	Interior Renovation Phase 3		5 New	State of Ohio
DRC-090026	Fire Alarm Upgrade - LeCI		1 New	State of Ohio
DRC-090052	Medical-Dental Addition - LorCI			

Tasks: 25 Total, 11 New, 6 Late
Messages: 1 New
Draft Records: 45 New
uMails: 72 New

Cross project tabs

Announcements

Projects with Active Tasks

Locating your Organization or Project

Unifier@https://ohio-unifier.oracleindustry.com - Windows Internet Explorer
https://ohio-unifier.oracleindustry.com/bp/g/nav/index

ORACLE PRIMAVERA UNIFIER Last login: 02/12/2015 12:24 PM

Home x Agency General Pr... x Program x Board of Reagents x Cleveland State Un... x Co

★ bwc-080002

▼ Matched Locations

BWC-080002	Elevator Modernization	/Agency/Bure
BWC-100002	BWC Ethics Tenant Improvements	/Agency/Bureau of Workers' Compensation
DAS-11N005	BWC Parking Garage Lighting Improvement	/Agency/Department of Administrative Services
BWC-110001	L-16 Halon Replacement Project	/Agency/Bureau of Workers' Compensation
BWC-130001	Emergency generator power back up to the York chillers	/Agency/Bureau of Workers' Compensation
BWC-130002	OFCC Tenant Improvements	/Agency/Bureau of Workers' Compensation
BWC-130003	15th floor Halon Replacement	/Agency/Bureau of Workers' Compensation
BWC-140001	William Green Fire Alarm Upgrade	/Agency/Bureau of Workers' Compensation
BWC-150001	WGB Rear Lobby Renovation	/Agency/Bureau of Workers' Compensation
BWC01	Bureau of Workers' Compensation	/Agency

► Key Locations

DMR-090010	Various Improvements, Tiffin & Northw	2 New	State of Ohio
DAS-100002	North High Complex - Phase 4	1 New	State of Ohio
DAS-050034	Liberty District Phase 2 - Food Ser	10 New	State of Ohio

Items Requiring Your Attention:
[Tasks: 25 Total, 9 New, 5 Late](#)
[Messages: 1 New](#)
[Draft Records: 49 New](#)
[uMails: 72 New](#)

Type in the name of the organization or project and click on the name of the project to open it

Project Home Page

The screenshot shows the Oracle Primavera Unifier interface. The browser address bar displays the URL <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page header includes the Oracle Primavera Unifier logo, the user's last login time (07/22/2015 11:21 AM), and a proxy indicator for 'Kayli'. The navigation pane on the left lists various project components: Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. Red arrows point to the Collaboration, Document Manager, and Logs items. The main content area shows a 'Summary' tab for the 'Lock-Door Upgrade' project, with an 'Image' placeholder. Below the summary is a 'Details' section with the following information:

Project Number:	DRC-16L006
Project Name:	Lock-Door Upgrade
Description:	This project will replace the locking system in the segregation housing unit (ranges C, D, E, and F) approx. 72 cell from doors at Chillicothe Correctional Institution.
Administrator:	Moenique Morris
Currency:	United States Dollar (USD)
Status:	Active
Email Address:	2105-test@oracle.com

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 the Oracle Primavera Unifier web interface. The browser address bar displays the URL <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page title is "ORACLE PRIMAVERA UNIFIER" with a last login time of "08/18/2015 05:51 AM". The breadcrumb navigation shows "School Facilities > Miami Trace-LSD-FAY-CFAP-2014". The left sidebar contains a navigation menu with items: Alerts, uMail, Collaboration, Tasks, Messages, Drafts, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. A red arrow points from the "Collaboration" menu item to a red-bordered box on the right. This box contains the text "Collaboration houses:" followed by a bulleted list: "- Tasks", "- Messages", and "- Drafts". The main content area shows the "Summary" tab for the project "Miami Trace-LSD-FAY-CFAP-2014 - Home". It features an "Image" section with the "MT PANTHERS" logo. Below the image is a "Details" section with the following information:

OAKS Code:	SFC-160389
District Project Identifier:	Miami Trace-LSD-FAY-CFAP-2014
Description:	Build New High to house 831 9-12, CT students in a 129,613.84 square foot facility at a total project cost of \$34,638,594.68
Administrator:	Kaylie Ruff
Currency:	United States Dollar (USD)
Status:	Active

At the bottom of the interface, there are buttons for "New", "Open", and "Find".

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 - 1		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. The list contains 12 items, all of which are 'Subcontractor/Supplier Declaration' or 'Contract Schedule of Values'.

Type	From	Subject	Received Date
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	09/14/2009
Action Items	Consultant Student5,s	AI-00039: George's Visit	08/13/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0023: Waterspout Widges	07/21/2009
Submittals	Fred Holcomb,soo	SUB-0002: Fred Submittal #1	05/26/2009
Submittals	Fred Holcomb,soo	SUB-0002: Fred Submittal #1	05/26/2009
Contract Schedule of Values	Steve Mayo,soo	C SOV-0003: Plumbing Prime - Oak	04/15/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0003: Fred Sum Dec 1	04/10/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0002: Approved Componete &	04/04/2009
Subcontractor/Supplier Declaration	Fred Holcomb,soo	SSD-0002: Approved Componete &	04/04/2009
Contract Schedule of Values	Fred Holcomb,soo	C SOV-0002: General Prime 2 - San	04/04/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	04/02/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	04/02/2009

Messages: Any tasks you have been carbon copied on, no action required

Drafts

The screenshot shows a software interface with a navigation pane on the left and a main content area on the right. The navigation pane lists various folders, with 'Drafts' highlighted. A red arrow points from a text box to the 'Drafts' folder. The main content area displays a list of 11 draft items.

Drafts - Current View: All
11 Item(s)

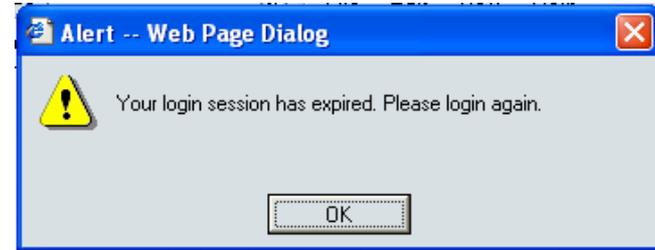
Type	Number	Title	Last Saved
Meeting Minutes			09/21/2009
Action Items			09/21/2009
Action Items		shauna	09/21/2009
Design Reviews			08/28/2009
Contract Schedule of		Plumbing - Mayo	08/20/2009
Subcontractor/Suppli		Oaks Plumbing	08/19/2009
Contractor Pay Requi			06/25/2009
Action Items			05/12/2009
Fund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

Drafts: Unfinished records you have created and saved

Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

- ▶ All unsaved work will be lost
- ▶ No warning will be given



Use "Save" if needed to save work as a draft

The screenshot shows the OAKS CI application interface. The main window title is "Applications for Payment K12". The "General" tab is selected and circled in red, with a red arrow pointing to it. The "General" tab contains the following information:

- Project Name: Miami Trace-LSD-FAY-CFAP-2014
- Record Number: [Empty field]
- Project Number: SFC-160389
- Creator: Katie Tuttle

Below the "General" tab is the "Action Details" section, which includes a "Create New Applications for Payment K12" button and a "Task Notes" field. The "Pay Request Details" section is also visible, showing a table with columns for "No.", "WBS Code", "Commit Short Description", "Scheduled Value", "Previously Earned", "Earned This Period", "% Labor Complete", and "% Materials Complete". The table currently shows 0 items. At the bottom of the interface, the "General Comments" link is circled in red.

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 the Oracle Primavera Unifier interface. The top navigation bar includes the application name and a breadcrumb trail: Agency > Department of... > Fire Alarm Upgrad... The left sidebar contains a tree view of navigation items, with 'Logs' expanded to show a list of business process types. A red arrow points from the 'Contract' item in the sidebar to a red-bordered box containing text. The main content area displays a table of 'Professional Services Pay Request' records.

Title	Agreement Name	Provider
DRC-130022 PR09	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR08 Dynamix Eng	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR07	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR06	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR05	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR04	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR03	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR02	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR01 Dynamix Eng	DRC-130022 AE Agmt	Dynamix Engineering Ltd.

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

How do Records Work?



Create a Record

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

Create New Action Items - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&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 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 *

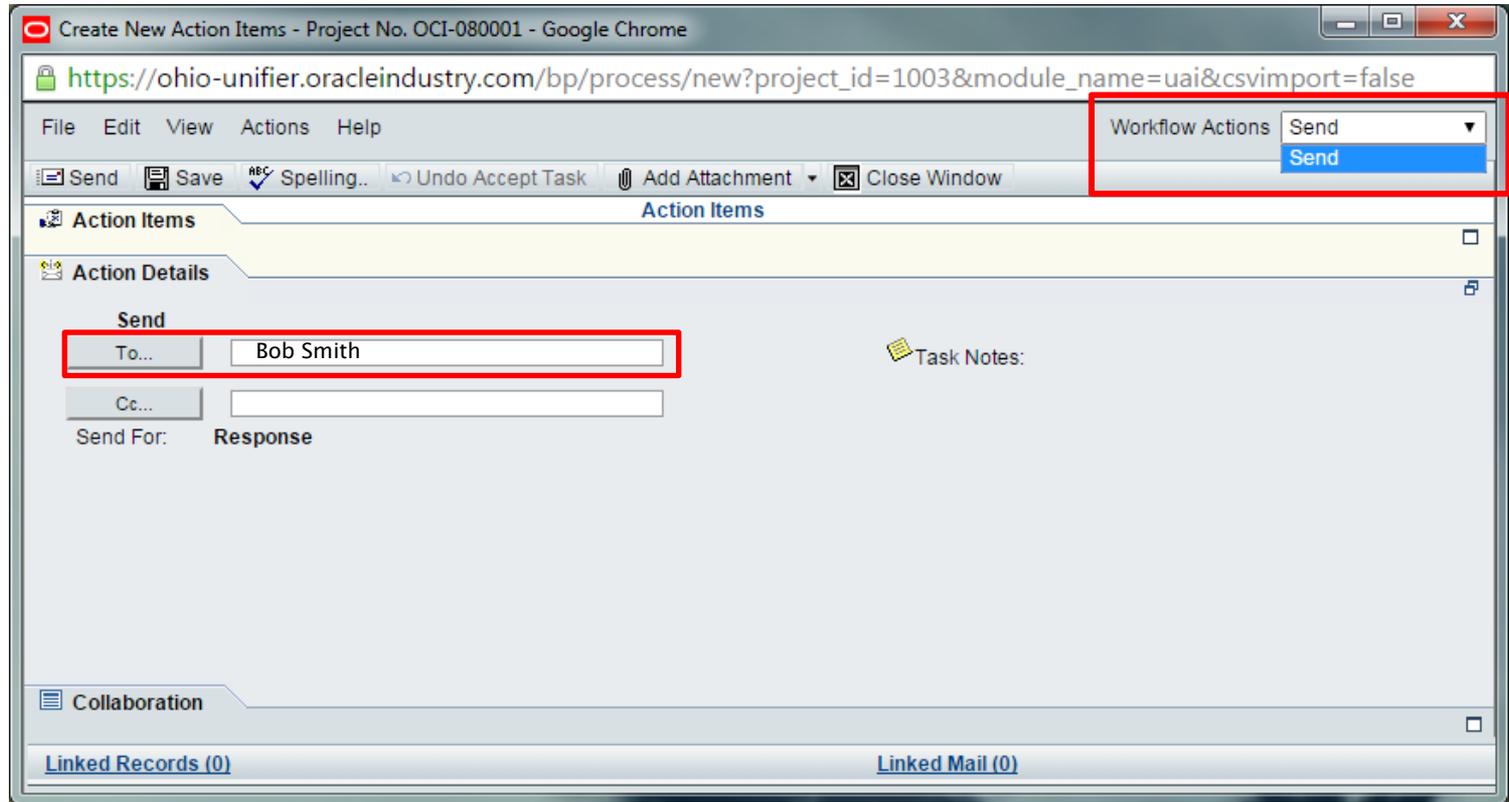
Action Details

Collaboration

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

Create a Record

- ▶ Choose a Workflow Action
- ▶ Click Send



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

Working with Tasks



Reviewing a Task

1) Choose the task you need to review and double click to open

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Design Reviews	DR-0009			Shauna Hook	Initial Review	12/12/2009	12/09/2009
Design Reviews	DR-0008			Shauna Hook	Initial Review	12/07/2009*	12/04/2009
Professional Services /	Amend-001	oci090001-amen		Consultant St	Amendment P		12/04/2009
Professional Services /	Amend-001	OCI 090001-Ame		Consultant St	Amendment P		12/04/2009
Professional Services /	Amend-001	OCI-090001- Am		Consultant St	Amendment P		12/04/2009
Professional Services /	Amend-000	OCI-099 Amend 1		Shauna Hook	Amendment P		12/04/2009
Subcontractor/Supplier	SSD-0077	ben and jerrys cc		Consultant St	PM Declaratio		12/04/2009
Subcontractor/Supplier	SSD-0076	Ben and Jerry's c		Consultant St	PM Declaratio		12/04/2009
Subcontractor/Supplier	SSD-0075	Ben and Jerry's c		Shauna Hook	PM Declaratio		12/04/2009
Subcontractor/Supplier	SSD-0074	Ben and Jerry's c		Consultant St	PM Declaratio		12/04/2009
Action Items	AI-00241	12/04/09 Visit	12/11/2009	Shauna Hook	Review		12/04/2009
Action Items	AI-00238	Today's visit	12/10/2009	Shauna Hook	Response		12/03/2009
Subcontractor/Supplier	SSD-0073	Ben and Jerry's		Oaks Student	Associate Dec	11/27/2009*	11/24/2009
Subcontractor/Supplier	SSD-0072	Ben and Jerry's		Oaks Student	Associate Dec	11/27/2009*	11/24/2009
Subcontractor/Supplier	SSD-0070	Ben and Jerry's		Shauna Hook	Associate Dec	11/27/2009*	11/24/2009
Professional Services A	agree-0010	Hasenstab 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	CSOV-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	CSOV-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: 12/09/09

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)

2) Click Accept Task

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

Responding to a Task

1) Select Appropriate Workflow Action

Workflow Actions

Select-
Select-
Return For Clarification
Send For Detailed Review

General

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

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

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:

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

Design Reviews

Attachment Index : (3)

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

General Comments

Responding to a Task

The screenshot shows a web browser window with the URL https://oaksci.training.ohio.gov/?srcid=26&model=udr&fromcostlog=1&project_id=1009. The page title is "Design Rev - Windows Internet Explorer". The browser menu bar includes File, Edit, View, Actions, and Help. The "Workflow Actions" dropdown menu is open, showing "Send For Detailed Review".

The main content area is titled "Design Reviews" and has tabs for "General" and "Action Details". The "Action Details" tab is active, showing the "Send For Detailed Review" task. The task details include:

- Task Name: Send For Detailed Review (Click here to view latest content)
- To...: Becky Bessell, Consultant Student1, Consultant
- Task Due: 12/19/2009
- Task Notes: (empty)

Red annotations highlight the "Send" button in the browser menu and the "To..." field in the task details. Two numbered instructions are provided:

- 3) Click Send
- 2) Click the "To" box and choose the next person to get the task

A note in a red-bordered box states: "Note: When Workflow action is selected the Action Details (To: box) tab updates".

At the bottom of the page, there are sections for "Design Reviews", "Linked Records (0)", "General Comments", and "Linked uMails (0)".

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



Finding the Record Status

The screenshot displays a software application window with a navigation pane on the left and a main content area on the right. The navigation pane lists various project-related items, with 'Professional Services Pay Request' circled in red. The main content area shows a table of records for 'Professional Services Pay Request'.

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

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

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:

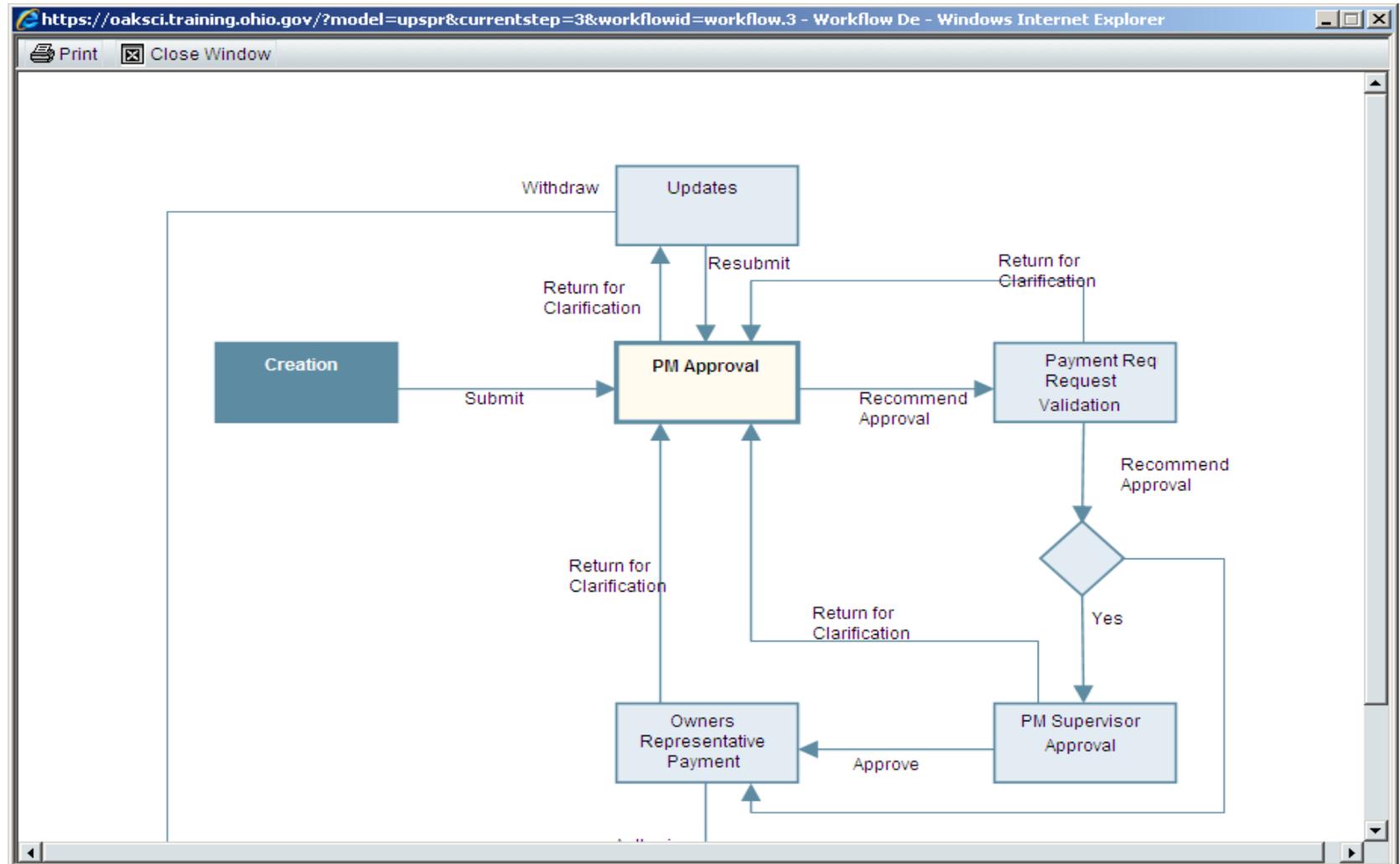
Step Name	Completion Rule	Status
Creation	Any User	Completed
PM Approval	Any User	Completed
Updates	Any User	Not Started
PM Supervisor Approval	Any User	Not Started
Owners Representative Payment Authorizal	Any User	Completed
Payment Request Validation	Any User	Completed
Payment Process	Any User	Not Started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

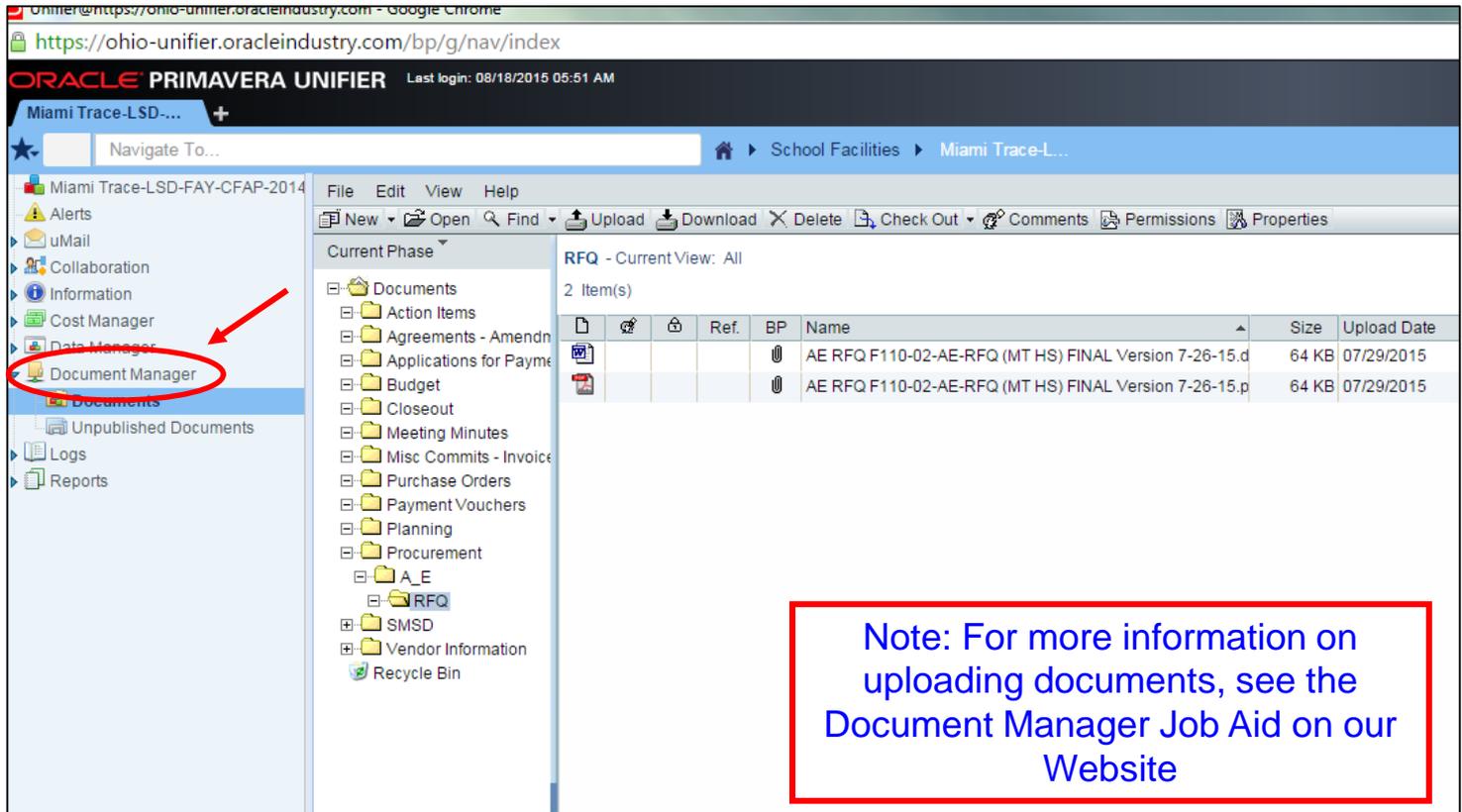
 

Graphic View of Workflow



Document Manager

- ▶ Document manager houses all supporting documentation
- ▶ The utilization of Document Manager will differ based on your particular project
 - ▶ For more information on Document Manager please see the Job Aid located on our website: <http://ofcc.ohio.gov/Resources/OAKSCI.aspx>



The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page title is "ORACLE PRIMAVERA UNIFIER" with a last login time of "08/18/2015 05:51 AM". The navigation pane on the left includes "Miami Trace-LSD-FAY-CFAP-2014" and various tool icons, with "Document Manager" circled in red and a red arrow pointing to it. The main content area shows a file browser for "RFQ - Current View: All" with two items listed in a table:

	Ref.	BP	Name	Size	Upload Date
			AE RFQ F110-02-AE-RFQ (MT HS) FINAL Version 7-26-15.d	64 KB	07/29/2015
			AE RFQ F110-02-AE-RFQ (MT HS) FINAL Version 7-26-15.p	64 KB	07/29/2015

Note: For more information on uploading documents, see the Document Manager Job Aid on our Website

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211