



Introduction to OAKS CI

Job Aids

- ▶ For additional reference materials visit our website ofcc.ohio.gov
- ▶ Click: Resources -> OAKS CI -> Choose Higher Ed or K-12 Training-> Choose Job Aid

The image shows two overlapping screenshots of the OFCC website. The left 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' link in the dropdown to the right screenshot. The right screenshot shows the 'OAKS CI Training Opportunities (Agency/Higher Education)' page. The breadcrumb trail reads: 'You are here: Resources > OAKS CI > Agency/Higher Ed Training'. The page title is 'OAKS CI Training Opportunities (Agency/Higher Education)'. Below the title, there are two tabs: 'Agency/Higher Ed (All Users)' and 'Agency/Higher Ed (User-Specific)'. The 'All Users' tab is active. A text block states: 'The OAKS CI team is pleased to provide a growing bank of training guides and pre-recorded webinar session which can be viewed at any time. Registrations and passwords are not required. This list is updated as new information becomes available. For additional training information or questions, contact Shauna Hooks at shauna.hooks@ofcc.ohio.gov.' Below this text is a table with columns 'Title', 'Recorded Presentation', and 'Training Guide'. The table contains the following rows:

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>

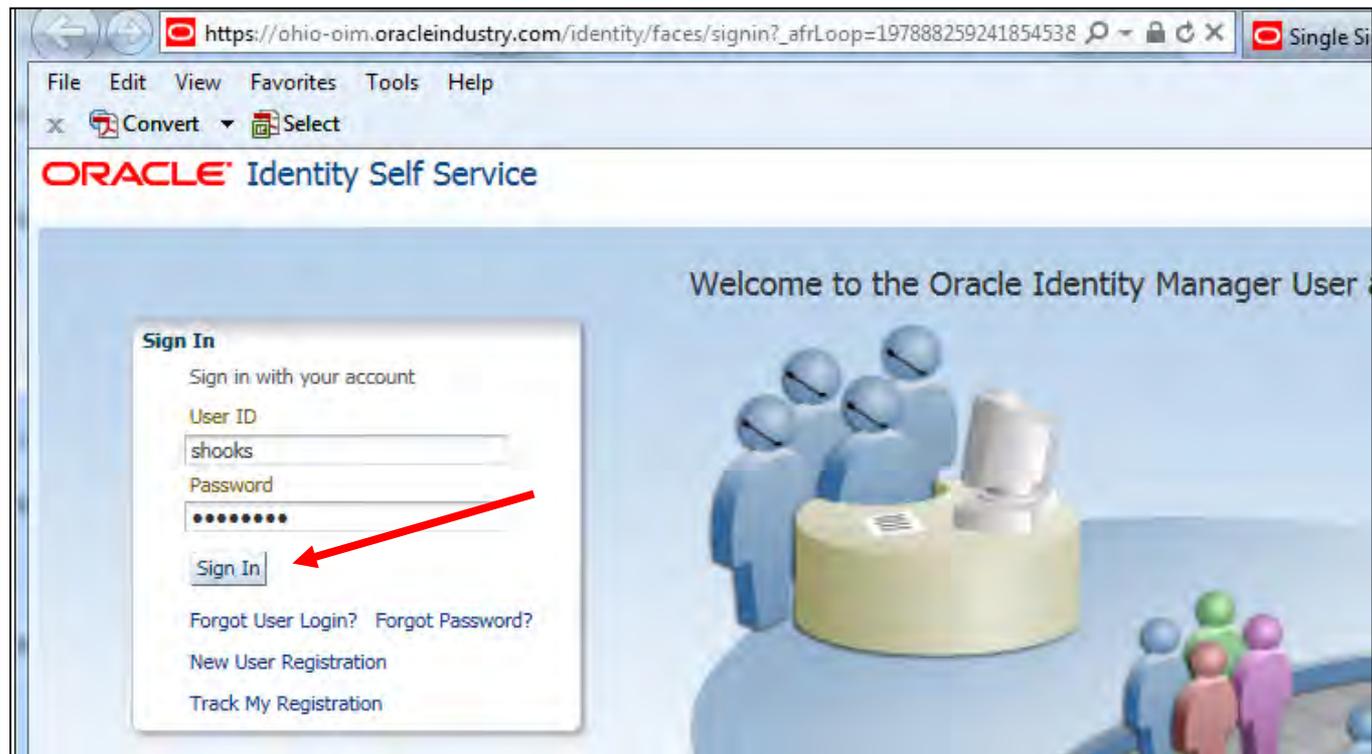
Agenda

In the following presentation we will discuss:

- Using OIM to manage your OAKS CI password (Pages 5–6)
- Navigating OAKS CI (Page 7–18)
 - Navigating to Your Project (7–11)
 - Collaboration: Tasks, Messages, Drafts (12–17)
 - Logs: Business Processes (18)
- Records (19)
- Document Manager (33)

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 displays the Oracle Identity Self Service interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below the menu bar, there are two buttons: 'Convert' and 'Select'. A prominent 'Submit' button is located in the top right corner. The main heading is 'ORACLE Identity Self Service'. Underneath, there is a 'Password Management' section with a user icon. The text 'Please reset your password.' is followed by three input fields: '* Old Password', '* New Password', and '* Re-Type New Password'. The 'New Password' field has an information icon (i) to its right. Below this, there is a section titled 'Register challenge questions for your account' with three rows of questions and answers: '* Question1', '* Question2', and '* Question3', each with a dropdown menu and an answer input field.

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

Navigating OAKS CI in the Cloud

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 web interface. At the top, there are navigation tabs for Home, Projects, Program, Agency, and Higher Ed. The 'Higher Ed' tab is currently selected. Below the navigation bar, there is a search bar and a sidebar with icons for Home, Tasks, Messages, Drafts, and uMail. The main content area displays several sections: 'Announcements' with two messages, 'Tasks or New uMails' with a table of project data, and summary statistics for Tasks, Messages, Draft Records, and uMails. Three red arrows point to specific features: one to the 'Higher Ed' tab, one to the 'Announcements' section, and one to the 'Tasks' column in the table.

Cross project tabs

Announcements

Projects with Active Tasks

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			

Locating your Organization or Project

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 "02/12/2015 12:24 PM". The navigation menu includes "Home", "Agency General Pr...", "Program", "Board of Regents", and "Cleveland State Un...". The search bar contains the text "bwc-080002". A red box highlights the search bar and the first result, "BWC-080002 Elevator Modernization". A red arrow points to the search bar, and a text box explains the process: "Type in the name of the organization or project and click on the name of the project to open it".

Matched Locations	Organization/Project	Agency
BWC-080002	Elevator Modernization	/Agency/Bureau of Workers' Compensation
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

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

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 name 'Unifier@https://ohio-unifier.oracleindustry.com', the last login time '07/22/2015 11:21 AM', and a proxy indicator 'Proxy for Kayli'. The navigation pane on the left lists several modules: Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. Red arrows point to the Collaboration, Document Manager, and Logs modules. The main content area shows the 'Lock-Door Upgrade - Home' page with a 'Summary' tab and 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 the existing 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!

Unifier@https://ohio-unifier.oracleindustry.com - Google Chrome
https://ohio-unifier.oracleindustry.com/bp/g/nav/index

ORACLE PRIMAVERA UNIFIER Last login: 08/18/2015 05:51 AM

Company Workspace Miami Trace-LSD-... +

Navigate To... School Facilities Miami Trace-L

Miami Trace-LSD-FAY-CFAP-2014 File Edit View Help

Miami Trace-LSD-FAY-CFAP-2014 - Home

Summary

Image

Details

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

New Open Find

Collaboration houses:

- Tasks
- Messages
- Drafts

Tasks (Your Records)

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a tree view of folders: Projects (Standard), OAKS CI Training 2 - Home, Summary, Alerts, uMail, Collaboration, Tasks, Messages, Drafts, Information, Cost Manager, Data Manager, Document Manager, Schedule Manager (Basic), Logs, and Reports. The 'Tasks' folder is highlighted, and a red arrow points from a text box below to it. The main content area displays a table of tasks with columns: Type, Number, Title, Record Due, From, Sent for, Task Due, and Received. The table contains 10 items.

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Action Item	AI-00066	indigo	09/30/2009	Shauna Hook	Response		09/23/2009
Action Items	AI-00065	Visit	09/30/2009	Shauna Hook	Response		09/23/2009
Request for	RFI-00007	HVAC 1		Consultant St	Response Acc	09/07/2009*	08/31/2009
Action Item	AI-00054	dsds	09/07/2009*	Consultant St	Review		08/31/2009
Action Item	AI-00015	New Action	07/20/2009*	Shauna Hook	Response		07/13/2009
Change Orc	CO-0004	Bruce's and Rita's		Oaks Student	CM Review		07/09/2009
Action Items	AI-00012	Project One	06/19/2009*	Oaks Student	Response		06/12/2009
Contract Sc	C SOV-0004	General Prime - 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 application window titled 'Company Workspace' with a 'Projects' sub-tab. The left-hand navigation pane lists various folders, with 'Messages' highlighted. The main window area displays a list of 12 messages. A red arrow points from a text box to the 'Messages' folder in the navigation pane.

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

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

Drafts

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

Drafts - Current View: All
11 Item(s)

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

Drafts: Unfinished records you have created and saved

Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

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



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

A screenshot of the OAKS CI application interface. The "Save" button in the top toolbar is circled in red. The main content area shows a form for "Applications for Payment K12" with fields for Project Name, Project Number, Record Number, and Creator. Below this is the "Action Details" section with "Create New Applications for Payment K12" and "Task Notes" fields. At the bottom, the "Pay Request Details" section is 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 "General Comments" link at the bottom is also circled in red.

Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you're typing extensive notes, first type them in a Word doc then copy and paste into General Comments

Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

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

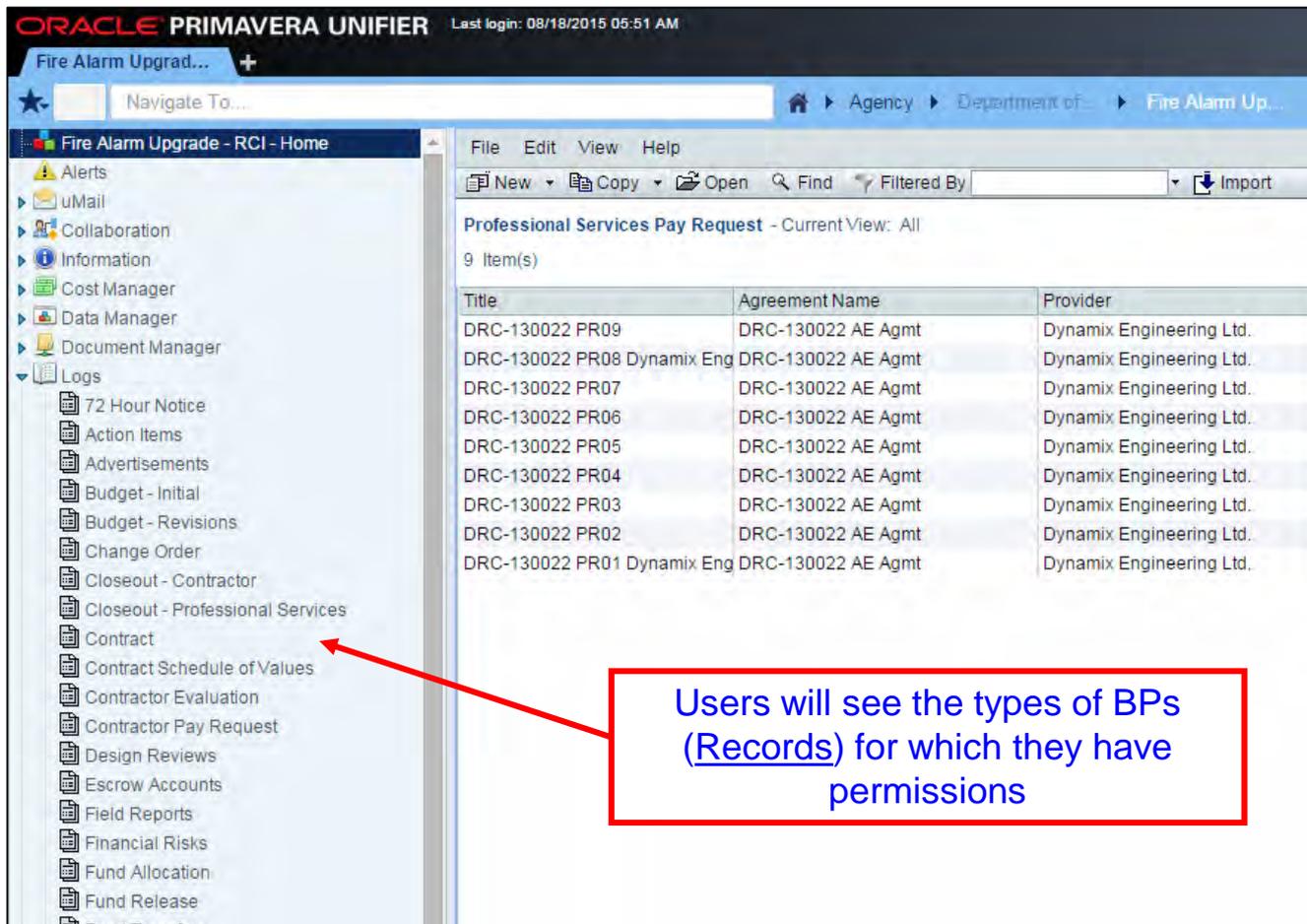
A screenshot of the OAKS CI application interface. The "Save" button in the top toolbar is circled in red. The main content area shows a form for "Applications for Payment K12" with fields for Project Name, Project Number, Record Number, and Creator. Below this is the "Action Details" section with "Create New Applications for Payment K12" and "Task Notes" fields. At the bottom, the "Pay Request Details" section is 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 "General Comments" link at the bottom is also circled in red.

Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you're typing extensive notes, first type them in a Word doc then copy and paste into General Comments

Logs

Logs house Business Processes or “BPs” (Records)

- ▶ A BP is any Record that has been created (i.e. Pay Requests, Submittals, etc.) and submitted through a workflow for review or approval.



The screenshot displays the Oracle Primavera Unifier interface. The left-hand navigation pane is expanded to the 'Logs' section, which contains a list of various business process types. A red arrow points from a text box to the 'Contract' item in this list. The main window shows a table of 'Professional Services Pay Request' records, with columns for Title, Agreement Name, and Provider. The table lists 9 items, all from Dynamix Engineering Ltd.

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

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

Unifier@https://ohio-unifier.oracleindustry.com - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/g/nav/index

ORACLE PRIMAVERA UNIFIER Last login: 01/28/2016 12:37 PM

Company Workspace Preble County Ser... MaCI Population M... Agency General P... +

Navigate To Agency OAKS CI

File Edit View Help

New Copy Open Find Filtered By

Action Items - Current View: All

20 Item(s)

Record No	Title	Assignee	
AI-00020	Test action item 2	Katie Tuttle	10
AI-00019	Training Action Item	Katie Tuttle	10
AI-00018	test action item	Shauna Hooks	10
AI-00017	Action Item Test		10
AI-00016	Notification Test		06
AI-00015	Title #1	Sara Freetage	08
AI-00014	test		02
AI-00013	asdf		02
AI-00012	test		12
AI-00011	CPR #1 Anderson Plumbing		09
AI-00010	Demo 1	Craig W	08
AI-00009	Time is 4:07		06
AI-00008	test time		06
AI-00007	.		05
AI-00006	test		05
AI-00005	test		10
AI-00004	Test 1/2/09 v1.1 Update	Steve	01
AI-00003	Test 11/22 Help File		12
AI-00002	Remove Login Message re V9.0	Fred	08
AI-00001	Test AI		05

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 *

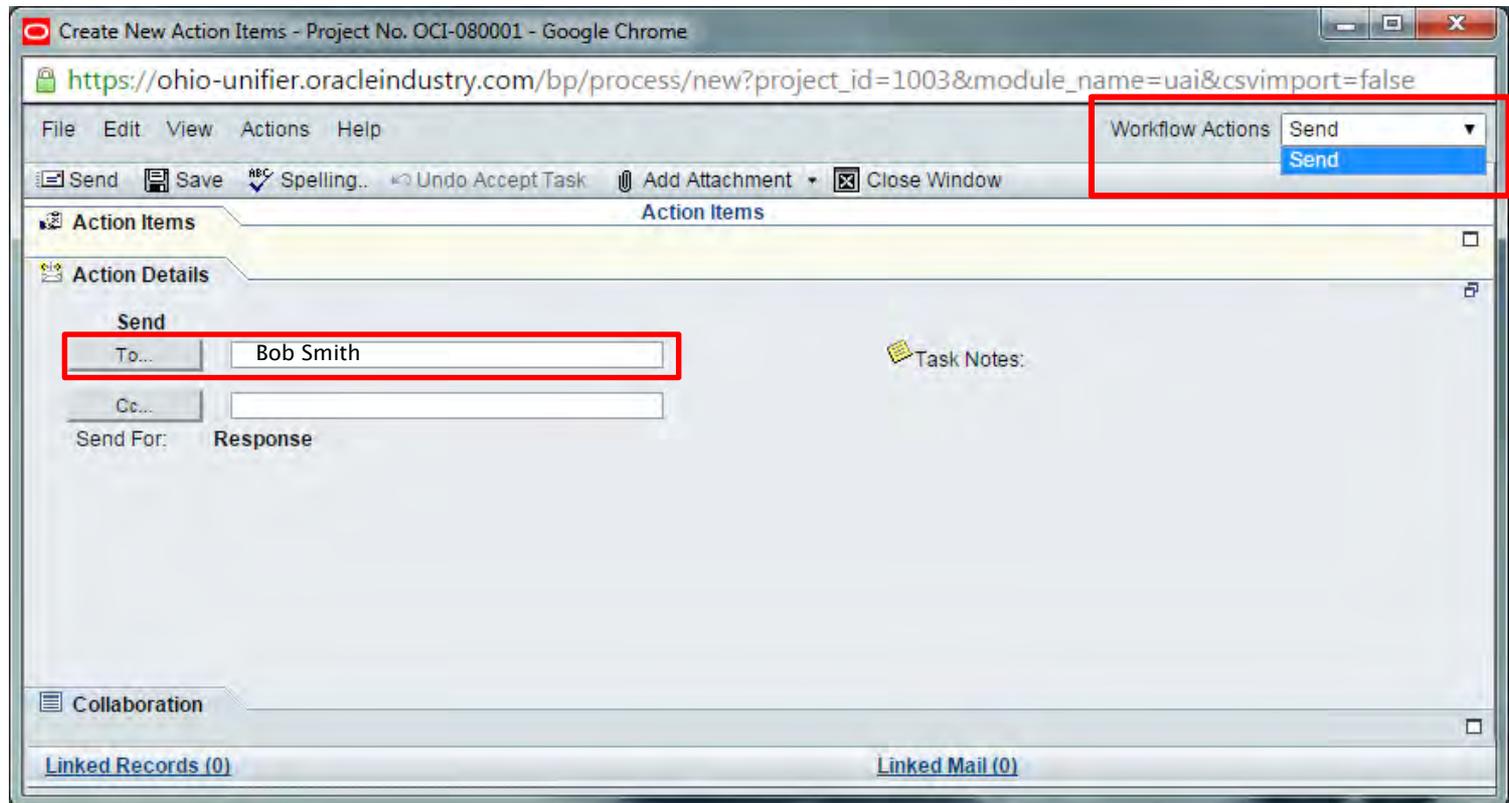
Action Details

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

The screenshot shows a software interface with a left sidebar containing a tree view of folders. The 'Tasks' folder is highlighted with a red circle. The main area displays a table of tasks. A red arrow points from the 'Tasks' folder to the first row of the table. A red box with blue text contains the instruction: '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 Archt		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)

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

Design Reviews

Task Notes (0)

To: Project Manager:Becky Bessell; More...

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)

New Rename Move Delete

Attachments

3 Item(s)

Display Attachments with Comments by: All

Page 1 of 1

Display 100 items per page

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

Add Comments Import Remove Comments Download Find

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

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 a task titled "Send For Detailed Review (Click here to view latest content)". The task details include:

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

Below the task details, there is a "Send For:" field with the value "Detailed Review".

Red annotations highlight the "Send" button in the browser menu bar 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 at the bottom right states: "Note: When Workflow action is selected the Action Details (To: box) tab updates".

At the bottom of the page, there are three tabs: "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 data view on the right. The navigation pane contains a tree view of folders and items, with 'Logs' and 'Professional Services Pay Request' circled in red. The main view shows a table titled 'Professional Services Pay Request - Current View: All' with 2 items. A red arrow points to the 'Status' column of the table.

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:

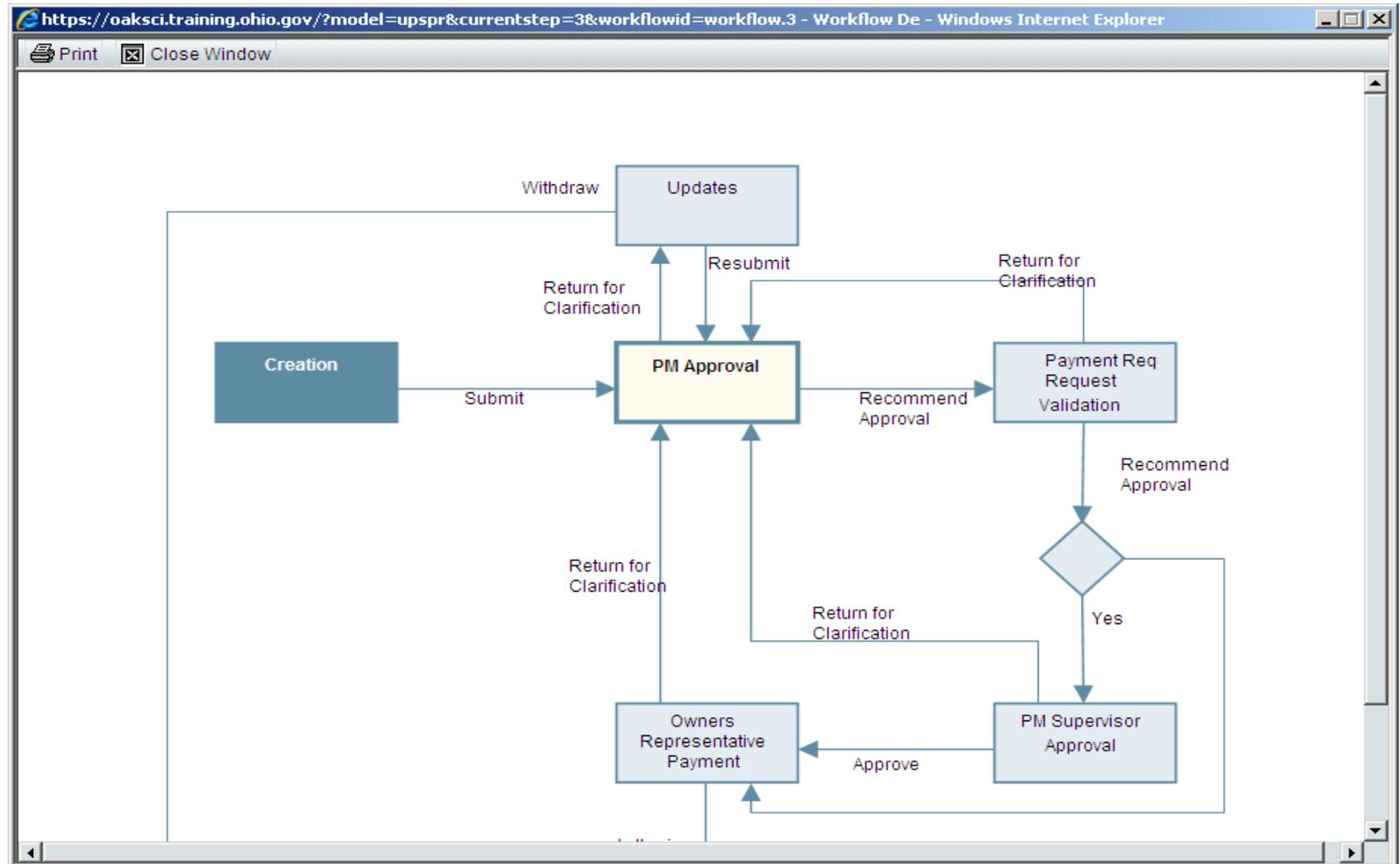
Step Name	Completion Rule	Status
Creation	Any User	Completed
PM Approval	Any User	Completed
Updates	Any User	Not Started
PM Supervisor Approval	Any User	Not Started
Owners Representative Payment Authorizal	Any User	Completed
Payment Request Validation	Any User	Completed
Payment Process	Any User	Not Started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

ORACLE PRIMAVERA UNIFIER Last login: 08/18/2015 05:51 AM

Miami Trace-LSD-FAY-CFAP-2014

File Edit View Help

New Open Find Upload Download Delete Check Out Comments Permissions Properties

Current Phase

RFQ - Current View: All

2 Item(s)

	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