



# Application for Payment

A/E, Cx, OA

# Application for Payment Creation

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Application for Payment K-12
  - ▶ Click New
  - ▶ Select Workflow

The screenshot shows the Oracle Primavera Unifier web application. 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 and the text "Last login: 11/30/2015 12:47 PM". The navigation menu on the left is expanded to "Logs", which is circled in red. A red arrow points from the "Logs" menu item to the "New" button in the top right of the main content area, which is also circled in red. The main content area displays "Applications for Payment K12 - Current View: All" with "0 Item(s)". Below this is a table with columns "Title", "Contract SOV", and "Contractor Name".

# Complete General Block

- ▶ All fields marked with a red \* are required
- ▶ Fill out any additional information

The screenshot shows a web browser window with the following details:

- Browser: Google Chrome
- Page Title: Create New Applications for Payment K12 - Project No. SFC-080001
- URL: [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=2969&module\\_name=uafpk&csvimport=fa](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2969&module_name=uafpk&csvimport=fa)
- Menu: File, Edit, View, Actions, Help
- Workflow Actions: -Select-
- Buttons: Send, Save, Spelling, Add Attachment, Discussion, SOV, Close Window
- Section: Applications for Payment K12
- General Block:
  - Project Name: OAKS CI District Training Project 1
  - Project Number: SFC-080001
  - Organization Name: OAKS CI District Training Project - 1
  - Facility Name: [Empty]
  - Title: Test Application for Payment \*
  - Contract Reference: 03 District Training Select... \*
  - Final Payment?: No \*
  - Record Number: [Empty]
  - Creator: Katie Tuttle
  - Creation Date: [Empty]
  - Status: [Empty]
  - Request Date: [Empty]
  - Vendor Name: Dynamix Engineering
  - EDGE Certified Prime?: [Empty]
  - Contract Type: CM at Risk
  - Retainage Release Requested?: -Select-
  - Period From: 11/23/2015 \*
  - Period To: 12/01/2015 \*
  - Internal Ref. Number: [Empty]
  - Associate Approval Date: [Empty]
- Certified Payroll Block:
  - Create a Certified Payroll record containing all data associated with this pay request and set the status to Complete. Select the record here.
  - Certified Payroll: [Empty] Select...
  - Pay Request Period Start: [Empty]
  - Pay Request Period End: [Empty]
- Action Details
- Pay Request Details
- Footer: Attachments (0), Linked Records (0), General Comments, Linked Mail (0)

# Previous Pay Request

- ▶ Select whether this is the initial pay request
- ▶ If not, click select to choose previous pay request. **Very Important!**

The screenshot shows the 'Create New Applications for Payment K12' form. The 'Previous Pay Request' section is highlighted with a red box. It contains the following fields:

- Initial Pay Request?: No (dropdown)
- Previous Pay Request: [ ] Select... (dropdown with button)
- Period From: [ ] (text input)

A red arrow points from the 'Select...' button to an inset window titled 'Applications for Payment K12 - Google Chrome'. This window displays a table of previous pay requests:

Title	Contract SOV	Contractor Name	Percent Complete	Total Payment Requested
03 District Training PR 02	03 District Training	Dynamix Engineering	0	30,000.00
03 District Training PR 01	03 District Training	Dynamix Engineering	0	20,000.00
SFC-080001-02-01 PR 1	SFC-080001-02-01	Dynamix Engineering	0	115,000.00

# Add Line Items

- ▶ Enter a line item corresponding to each item on the Schedule of Values (SOV) from the agreement for which payment is requested
- ▶ Click on the **Pay Request Details** Tab
- ▶ Click Add

The screenshot shows a web browser window titled "Create New Applications for Payment K12 - Project No. SFC-160390 - Google Chrome". The URL is [https://ohio-unifier.oracleindustry.com/bp/process/new?project\\_id=2090&module\\_name=uafpk&csvimport=false](https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=2090&module_name=uafpk&csvimport=false). The page has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with icons for "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The main content area is titled "Applications for Payment K12" and has several tabs: "General", "Action Details", and "Pay Request Details". The "Pay Request Details" tab is selected and circled in red. Below the tabs, there is a "Current View: All" section and a table with columns: "No.", "WBS Code", "Commit Short Description", "Scheduled Value", "Previously Earned", "Earned This Period", "% Labor Complete", and "% Materials Complete". The table is currently empty. At the bottom of the screen, there is a toolbar with buttons for "Add", "Copy", "Import", "Remove", and "Find". The "Add" button is circled in red, and a red arrow points to it. To the right of the toolbar, there is a "Total Amount:" field with a value of "\$0.00". At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# Add Line Items

- ▶ Enter a short description
  - ▶ Enter the % complete in the % Services Complete column
- OR**
- ▶ For a DPE or Reimbursable enter the **dollar amount** under the DPE or Reimbursable Column

Line Items - Google Chrome  
https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/opengrid?pref=ucsov&unit\_price\_check=1&from=&strModifiedRows=&model=uafpk&printable=5&coID=156

Split Cancel Row Changes

Line Items Page 1 of 1 Display 100 items per page

Ref.	SOV Reference Number	WBS Code *	WBS Item	Short Description *	Subcode	Scheduled Value	% Labor	% Materials	% Services Complete	DPE or Reimbursables(\$)
001	1	AE-BS-CA	Building 1			\$115,000.00	0	0	20	\$0.00
002	2	AE-BS-CA	Building 2			\$115,000.00	0	0	20	\$0.00
003	3	AE-BS-CA	Building 3			\$115,000.00	0	0	20	\$0.00
004	4	AE-BS-CA	Building 4			\$115,000.00	0	0	20	\$0.00
005	5	AE-BS-CA	Building 5			\$115,000.00	0	0	20	\$0.00
Total	0					\$575,000.00	0	0	100	\$0.00

OK Cancel

# Add Line Items

- ▶ Continue Adding Line Items
  - ▶ Line item information displays in the Pay Request Details
  - ▶ Continue to enter line items as necessary

Current View: All  
3 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	Re
003	AE-BS-CA	Building 5	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	
002	AE-BS-CA	Building 3	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	
001	AE-BS-CA	Building 1	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	

Total Amount: \$103,500.00

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Add Attachments

- ▶ To add any additional documentation
  - ▶ Click Add Attachment
  - ▶ Choose My Computer and locate your documents
  - ▶ Click Open then Click OK

The screenshot illustrates the process of adding attachments to a web application. The main window is titled "Create New Applications for Payment K12 - Project No. SFC-080001". The "Add Attachment" button is highlighted with a red box, and its dropdown menu is open, showing "My Computer" selected. A red arrow points from this menu to a "File Upload" window, which is open to a file explorer showing the contents of the "My Computer" drive. The file explorer shows various folders and files, including "Documents", "Music", "Pictures", "Videos", "Computer", "OSDisk (C:)", "SAO (G:)", "Databases (I:)", "cims (\\file) (J:)", and "Legal (L:)". The "File Upload" window has a table with columns for "Document Title", "Rev. No.", "Issue Date", and "File Name". The "Open" dialog box is also visible, showing the file explorer and the "Open" button.

# Submit Record

- ▶ Attachments populate at the bottom of your record
- ▶ Choose Workflow Action Submit
- ▶ Action Details will auto-populate the “to” field
- ▶ Click Send

Applications for Payment K12 - Test - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task\_id=156126&id=5522&sourceId=0&project

File Edit View Actions Help

Workflow Actions Submit

Submit

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

Applications for Payment K12

General

Complete the General, Certified Payroll, and Previous Pay Request blocks; then complete the Pay Request Details on the lower form by clicking Add.

General

Project Name: OAKS CI District Training Project 1 Record Number:

Project Number: SFC-080001 Creator: Katie Tuttle

Organization Name: OAKS CI District Training Project - 1 Creation Date:

Action Details

Submit

To: Barbara Taylor, Katie Tuttle, Moenique Morris, R

Cc:

Send For: Review and Validation

Task Notes:

Pay Request Details

Current View: All

3 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	Re
003	AE-BS-CA	Building 5	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	
002	AE-BS-CA	Building 3	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	
001	AE-BS-CA	Building 1	\$115,000.00	\$23,000.00	\$34,500.00	0	0	50	

Total Amount: \$103,500.00

Add Copy Import Remove Find

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

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