

# OAKS CI

## Capital Improvements (Management System)

### Getting into your Project and Creating a Schedule Approval

Please note that you must have the Schedule Manager role within OAKS CI in order to create this record, if you find that you do not have access to the Schedule Approval Record, please contact OAKS CI at 614.644.2211 or [OAKSCI@OFCC.OHIO.GOV](mailto:OAKSCI@OFCC.OHIO.GOV)

# Unifier Login

- ▶ Open Internet Explorer
- ▶ Navigate To

<https://oaksci.osfc.ohio.gov>

- ▶ Username:  
**your assigned user name**
- ▶ Password:  
**your assigned password**
- ▶ Click “Login”

Skire Unifier Login - Windows Internet Explorer

https://oaksci.ohio.gov/

File Edit View Favorites Tools Help

Skire Unifier Login

Skire™ Speed. Control. Insight.™

Welcome

Skire Unifier™

Login

Important  
Verify that you are  
Before logging into  
computer for use.

Return to Skire Home

Username:

Password:

Login Cancel

Forgot Password?

Unauthorized Access is Prohibited. Unauthorized use of this system is strictly prohibited and is subject to prosecution under the Computer Fraud and Abuse Act of 1988 and Title 18, U.S. Code Sec. 1001 and 1030.

1st Time Users? Click Here. Terms & Conditions

# Cross Project Home Page

User Mode

File Edit View Help

New Open Find

Announcements:

Items Requiring Your Attention:

[Tasks](#): 42 Total, 34 New, 5 Late

[Messages](#): 0 New

[Draft Records](#): 10 New

[uMails](#): 3 New

Tasks or New uMails:

| Number     | Name                         | Tasks                    | uMails | Company Name           |
|------------|------------------------------|--------------------------|--------|------------------------|
| OCI-130101 | School Facilities Training 1 | 28 Total, 24 New, 2 Late | 3 New  | Ohio School Facilities |
| OCI-130007 | UAT 8 Rel 1 - Eaton          | 4 Total, 1 New, 3 Late   |        | Ohio School Facilities |
| OCI-130006 | UAT 7 Rel 1 - Deaf and Blind | 1 Total, 1 New, 0 Late   |        | Ohio School Facilities |
| OCI-130005 | UAT 6 Rel 1 - Louisville     | 1 Total, 1 New, 0 Late   |        | Ohio School Facilities |
| OCI-130003 | UAT 2 Rel 1 - Dayton STEM    | 4 Total, 3 New, 0 Late   |        | Ohio School Facilities |
| OCI-130002 | UAT 5 Rel 1 - Toronto        | 4 Total, 4 New, 0 Late   |        | Ohio School Facilities |

Cross project tabs

Announcements

Districts/Buildings with Active Tasks

# District and Building Level Access

The screenshot shows the Primavera Unifier web interface in Internet Explorer. The user is logged in as Shauna Hooks. The 'School Facilities' project is selected in the navigation menu. A red arrow points to the 'View' menu item, which is highlighted. A red-bordered box contains the text 'District and Building Level Project Access'. The main content area displays a table of tasks and uMails for the selected project.

**Items Requiring Your Attention:**

- Tasks: 42 Total, 34 New, 5 Late
- Messages: 0 New
- uMails: 10 New

**Tasks or New uMails:**

| Number     | Name                         | Tasks                    | uMails | Company Name           |
|------------|------------------------------|--------------------------|--------|------------------------|
| OCI-130101 | School Facilities Training 1 | 28 Total, 24 New, 2 Late | 3 New  | Ohio School Facilities |
| OCI-130007 | UAT 8 Rel 1 - Eaton          | 4 Total, 1 New, 3 Late   |        | Ohio School Facilities |
| OCI-130006 | UAT 7 Rel 1 - Deaf and Blind | 1 Total, 1 New, 0 Late   |        | Ohio School Facilities |
| OCI-130005 | UAT 6 Rel 1 - Louisville     | 1 Total, 1 New, 0 Late   |        | Ohio School Facilities |
| OCI-130003 | UAT 2 Rel 1 - Dayton STEM    | 4 Total, 3 New, 0 Late   |        | Ohio School Facilities |
| OCI-130002 | UAT 5 Rel 1 - Toronto        | 4 Total, 4 New, 0 Late   |        | Ohio School Facilities |

# District Access

The screenshot shows the Primavera Unifier web application interface. The browser address bar indicates the URL is <https://oaksci.training.osfc.ohio.gov>. The user is identified as Shauna Hooks, with a last login time of 10/08/2013 09:21 AM. The application is running in 'User Mode' and the current view is 'District Project'. A red box highlights the text: "District view will allow you to view all School Districts you may access". A red arrow points from this box to the 'District Project' dropdown menu in the top right corner of the application window.

**District view will allow you to view all School Districts you may access**

District Project - Current View: All

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

| District Project Identifier           | District                | OAKS Code  | Setup Date | Status |
|---------------------------------------|-------------------------|------------|------------|--------|
| Brookfield-LSD-TRU-CFAP-2007          | Brookfield Local SD     | SFC-       | 09/25/2013 | Active |
| Lancaster-CSD-FAI-ENP-2012            | Lancaster City SD       | SFC-130322 | 09/16/2013 | Active |
| Napolean-CSD-                         | Napoleon Area City SD   | SFC-120306 | 09/16/2013 | Active |
| National Trail-LSD-1990 Lookback-1-20 | National Trail Local SD | SFC-130316 | 09/16/2013 | Active |
| South-Western-CSD-FRA-CFAP-2012       | South-Western City SD   | SFC-130315 | 09/16/2013 | Active |

# Building Access

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

User Mode ▾ File Edit View Help

School Facilities - Home School Facilities - Home View Dashboard My Dashboard ▾

View: Building Project ▾

Building Project - Current View: All

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

| Number         | Name                               | Setup Date | Status |
|----------------|------------------------------------|------------|--------|
| SFC-130322.02  | Central Elementary                 | 09/23/2013 | Active |
| SFC-130315.17  | Prairie Norton Elementary          | 09/20/2013 | Active |
| SFC-120306.6   | Napoleon Area City School District | 09/19/2013 | Active |
| SFC-???????.01 | Brookfield K-12                    | 09/25/2013 | Active |

Building View will allow you building Level Access

Clicking on the building/project will take you to it's home page

# Building Home Page

The screenshot displays a software interface with a navigation menu on the left and a main content area. The main content area is titled 'Central Elementary - Home' and features a 'Summary' tab. A red arrow points from a red-bordered box containing the text 'Building Specific Home Page' to the 'Summary' tab. Below the 'Summary' tab is a 'Details' section with the following information:

|                |                                    |
|----------------|------------------------------------|
| 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 |

Other sections visible include 'Items Requiring Your Attention' with counts for Tasks, Messages, Draft Records, and uMails, and a 'Links' section with two external links.

# Building 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

User Mode ▾

Central Elementary - Home

- Alerts
- uMail
- Collaboration
- Information
- Cost Manager
- Data Manager
- Document Manager
- Logs
- Reports

Central Elementary - Home View Dashboard My Dashboard

Summary

Image

Items Requiring Your Attention

|                |           |
|----------------|-----------|
| Tasks:         | 0, New 0, |
| Messages:      | 0 New     |
| Draft Records: | 0 New     |
| uMails:        | 0 New     |

Details

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

Links

- Ohio Facilities Construction C
- Ohio School Facilities Comm

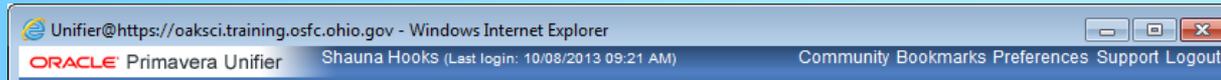
Most work is completed in 3 Areas

Collaboration—Your Work

Document Manager—Your supporting documentation

Logs— Where records are housed and created

# Building Home Page



**IMPORTANT NOTICE:** If you have documentation to attach to the new record , it must first be uploaded into your projects' Document Manager see slides 19–22 for assistance

|  |  |   |
|--|--|---|
|  | Name: Central Elementary<br>Description: New Elementary School<br>Administrat: Steve Mayo<br>or:<br>Currency: United States Dollar (USD)<br>Status: Active<br>Email: 1015-<br>Address: oaksci@soccemsmtp.em.ohio.gov | <a href="#">Ohio School Facilities Commission</a> |
|--|--|---|

# Create a Schedule Approval Record

The screenshot shows a software interface for 'School Facilities' within a 'Company Workspace'. The interface includes a navigation menu on the left, a main content area with a 'Summary' tab, and a 'Details' section. A blue callout box labeled 'Click Logs' points to the 'Logs' item in the navigation menu. Another blue callout box labeled 'Click Schedule Approvals' points to the 'Schedule Approvals' item in the navigation menu.

**Company Workspace** School Facilities School Facilities > Lanc

Mode File Edit View Help

**Central Elementary - Home** View Dashboard

**Summary**

Image

**Items Requiring Your Attention**

[Tasks:](#) 8, New 8, Late 0

[Messages:](#) 0 New

[Draft Records:](#) 1 New

[uMails:](#) 0 New

**Details**

**Links**

[Ohio Facilities Construction Commission](#)

[Ohio School Facilities Commission](#)

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

**Navigation Menu:**

- Central Elementary - Home
- Alerts
- uMail
- Collaboration
- Information
- Cost Manager
- Data Manager
- Document Manager
- Logs
- Advertisements
- Applications for Payment
- Budgets
- Certified Payrolls
- Closeout - Contractor
- Contract
- Contract Modification
- Contract Schedule of Value
- Design Reviews
- Escrow Accounts
- Field Reports
- Financial Risks
- Fund Allocation
- Fund Release
- Fund Transfers
- Liens
- Locally Funded Initiative MO
- Meeting Minutes
- Miscellaneous Change Ord
- Miscellaneous Commit
- Miscellaneous Invoice
- Punch Lists
- Purchase Orders
- Requests for Interpretation
- Schedule Approvals
- Subcontractor/Supplier Dec

# Create a Schedule Approval Record

The screenshot shows a software application window titled 'School Facilities' with a menu bar (File, Edit, View, Help) and a toolbar. The main area displays a table with columns: Subcontractor/Supplier, Type, Contractor Name, Status, Subcontractor/P.O. Amount \$, Edge Certified?, DFWP?, and Rec. A blue arrow points to the 'New' button in the toolbar. A blue oval callout contains the text 'Click New'. In the foreground, a 'Select Workflow - Windows Internet Explorer' dialog box is open. It has a 'Business Process' field set to 'Schedule Approvals' and a 'Workflow' dropdown menu. The dropdown menu is open, showing options: 'Select', 'Select', 'CM-R or DB Schedule Approval', and 'Multi-Prime Schedule Approval'. A blue arrow points to the 'CM-R or DB Schedule Approval' option, and a blue oval callout contains the text 'Choose the appropriate workflow based on Contract type'.

Click New

Choose the appropriate workflow based on Contract type

# Create a Schedule Approval

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Undo Accept Task Add Attachment Discussion Close Window

**General** Schedule Approvals

General

Project Number: SFC-130322.02 Record Number: [ ]

Project Name: Central Elementary Creator: Shauna Hooks

Organization Name: [ ] Creation Date: [ ]

Facility Name: [ ] Status: [ ]

Title: Schedule Approval Sample Title 1 \* Schedule Variance (Days): 0 \*

On Schedule: Yes \* Schedule Type: Baseline \*

Schedule Attached?:  \*

Report Detail

Progress: Please see attached documentation

Comments: My sample comments

**Action Details**

Create New Schedule Approvals

To... [ ]

Cc... [ ]

Send For:

Task Notes:

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

Complete fields, all areas with an \* are required

-Clicking on any tab will expand that area

# Attach Supporting Documentation

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add Attachment Discussion Close Window

General

Schedule Appro

My Computer

Unifier Folder

General

Project Number: SFC-130322.02 Record Number:

Project Name: Central Elementary Creator: Shauna Hooks

Organization Name: Creation Date:

Facility Name: Status:

Title: Schedule Approval Sample Title 1 \* Schedule Variance (Days): 0 \*

On Schedule: Yes \* Schedule Type: Baseline \*

Schedule Attached?:  \*

Report Detail

Progress: Sample progress information

Comments: Sample comments

Action Details

Create New Schedule Approvals

To...

Cc...

Send For:

Task Notes:

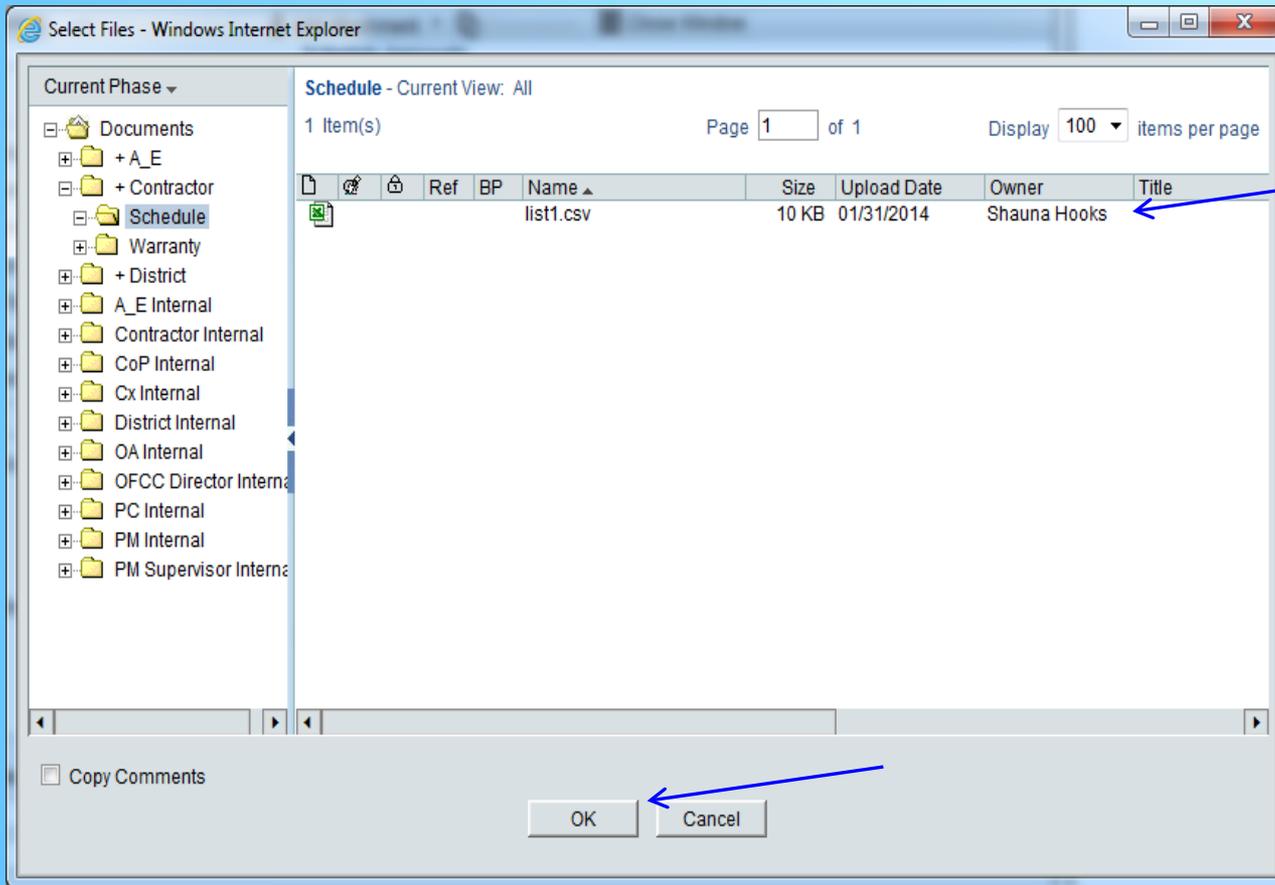
javascript:fnAttach() [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Attach Supporting documentation

-Click Add Attachment, then Unifier Folder

-To add an attachment the document must first be uploaded into Document Manager (review document manager walk thru page 19)

# Create a Schedule Approval



Find the document you previously uploaded

Highlight and click OK

# Create a Schedule Approval

File Edit View Actions Help

Workflow Actions -Select-  
-Select-  
Submit

**General**

General

Project Number: SFC-130322.02 Record Number:

Project Name: Central Elementary Creator: Shauna Hooks

Organization Name:  Creation Date:

Facility Name:  Status:

Title: Schedule Approval Sample Title 1 \* Schedule Variance (Days): 0 \*  
On Schedule: Yes \* Schedule Type: Baseline \*

Schedule Attached?:  \*

Report Detail

Progress: Sample progress information

Comments: Sample comments

**Action Details**

Create New Schedule Approvals

To...

Cc...

Send For:

Task Notes:

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

Observe new attachment in lower form

-If record is complete, go to upper right hand corner and choose **Submit** in Workflow Actions

If you wish to Save the record for completion later view slide 16  
Skip to slide 17 to Send record to next step

# To Save – Schedule Approval Record

The screenshot shows a web browser window titled "Create New Schedule Approvals - Project No. SFC-130322.02 - Windows Internet Explorer". The browser's address bar and menu bar are visible. The main content area displays a form for creating a new schedule approval record. The form is divided into three sections: "General", "Report Detail", and "Action Details".

**General Section:**

- Project Number: SFC-130322.02
- Project Name: Central Elementary
- Organization Name: [Empty]
- Facility Name: [Empty]
- Title: Schedule Approval Sample Title 1 \*
- On Schedule: Yes \*
- Schedule Attached?:  \*
- Record Number: [Empty]
- Creator: Shauna Hooks
- Creation Date: [Empty]
- Status: [Empty]
- Schedule Variance (Days): 0 \*
- Schedule Type: Baseline \*

**Report Detail Section:**

- Progress: Sample progress information
- Comments: Sample comments

**Action Details Section:**

- Submit button
- To...: Rita Nichols, Shauna Hooks, Steve Mayo, Tame
- Cc...: [Empty]
- Send For: AE Review
- Task Notes: [Empty]

A blue arrow points from the "Save" button in the browser's toolbar to the "Save" button in the form's "Action Details" section.

Click the Save button instead of Send, this will allow you to complete the record later.

When you log back into your project, instead of Clicking Logs you will Click Collaboration then click Drafts, this will take you to your Saved records

# Submit –Schedule Approval Record

Workflow Actions Submit

Send Save Spelling... Undo Accept Task Add Attachment Discussion Close Window

General Schedule Approvals

General

Project Number: SFC-130322.02 Record Number:

Project Name: Central Elementary Creator: Shauna Hooks

Organization Name:  Creation Date:

Facility Name:  Status:

Title: Schedule Approval Sample Title 1 \* Schedule Variance (Days): 0 \*

On Schedule: Yes \* Schedule Type: Baseline \*

Schedule Attached?:  \*

Report Detail

Progress: Sample progress information

Comments: Sample comments

Action Details

Submit

To... Rita Nichols,Shauna Hooks,Steve Mayo,Tame

Cc...

Send For: AE Review

Task Notes:

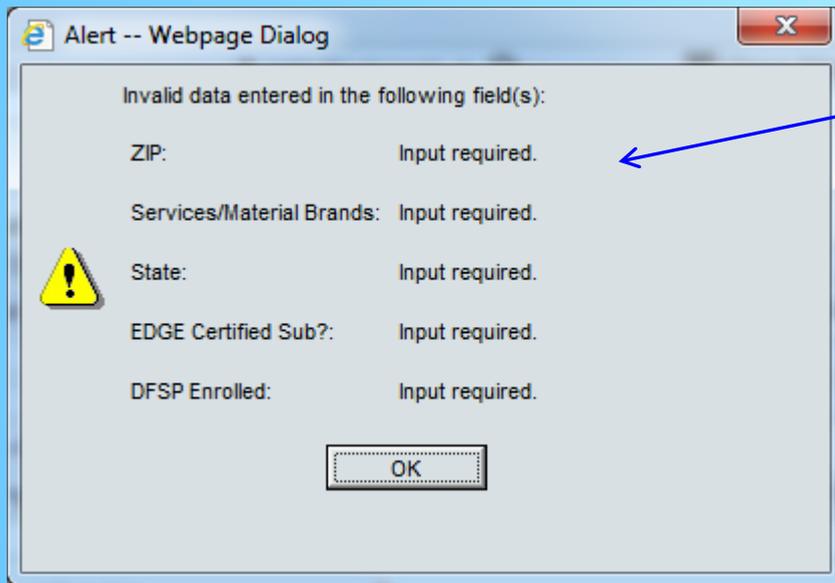
Attachments (1) Linked Records (0) General Comments Linked Mail (0)

View the Action Details tab—it will update with the name of the next person in the workflow

Click the Send button

# Submit- Schedule Approval Record

If an Error message appears, review message and make corrections

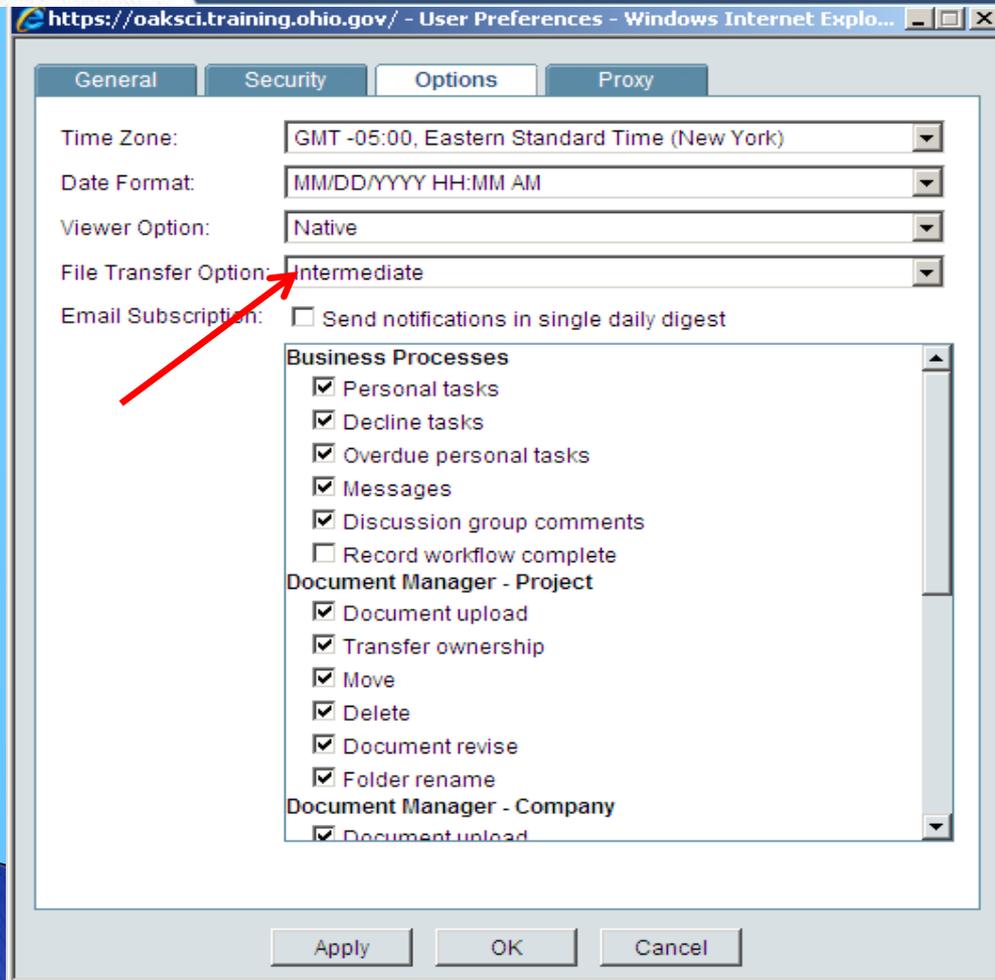


# Before Uploading to Document Manager

Nauna Hooks (Last login: 11/14/2013 10:32 AM)

Community Bookmarks Preferences Support

Subjects School Facilities



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

# File Upload

Choose folder 3

Click Upload 4

The screenshot shows a web-based file management interface. On the left is a navigation pane with a tree view. In the center is a file browser showing a folder structure. On the right is a file list table. Four callouts are present: '1' points to 'Document Manager' in the left pane; '2' points to 'Documents' in the left pane; '3' points to the 'Schedule' folder in the central file browser; and '4' points to the 'Upload' button in the top toolbar.

Central Elementary - Home

Alerts

uMail

Collaboration

Tasks

Messages

Drafts

Information

Cost Manager

Data Manager

Document Manager

Documents

Unpublished Documents

File Edit View Help

New Open Find Upload Download Delete Check Out Comments Permissions

Current Phase

Documents

+ A\_E

+ Contractor

Schedule

Warranty

+ District

A\_E Internal

Contractor Internal

CoP Internal

Cx Internal

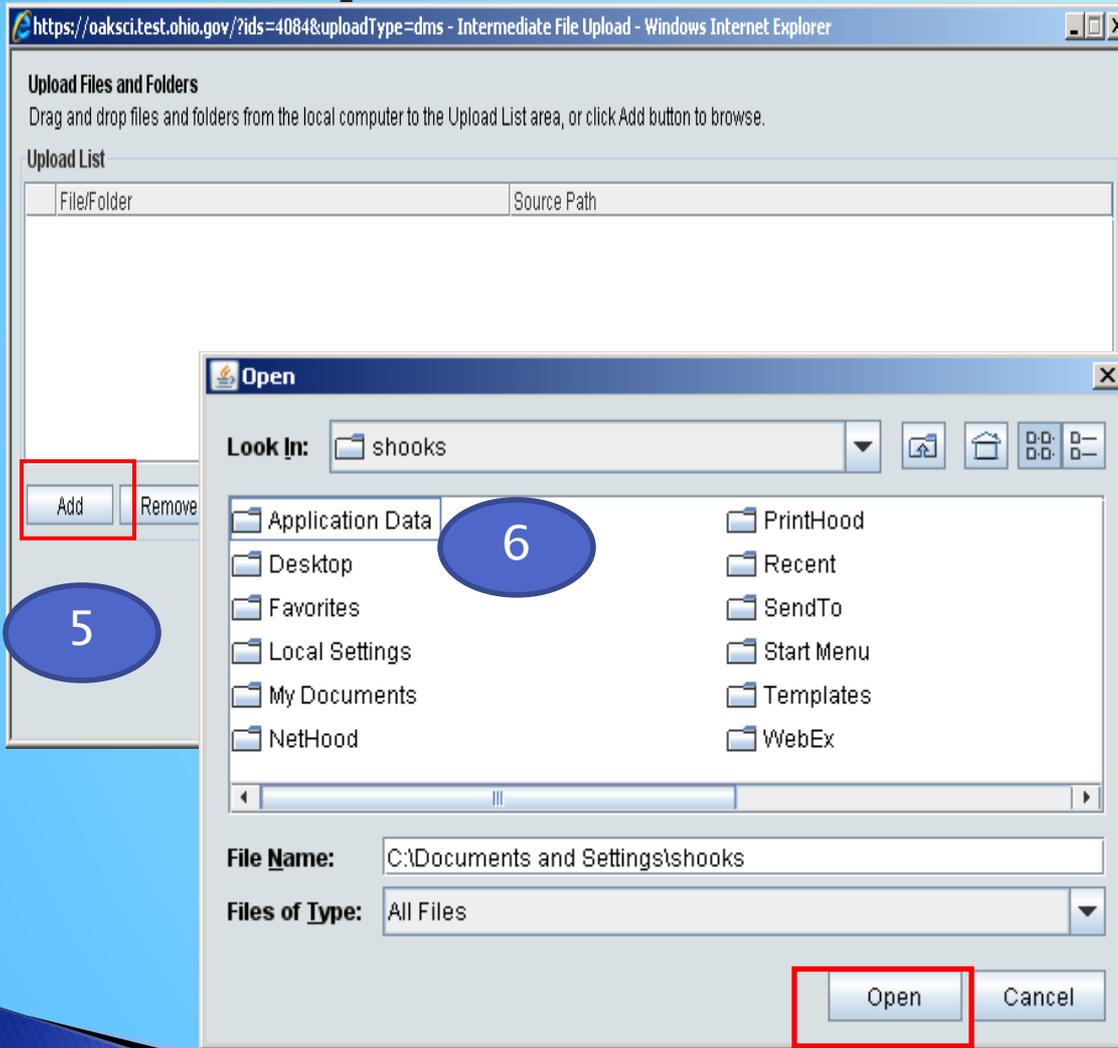
District Internal

Schedule - Current View: All

1 Item(s) Page 1 of 1

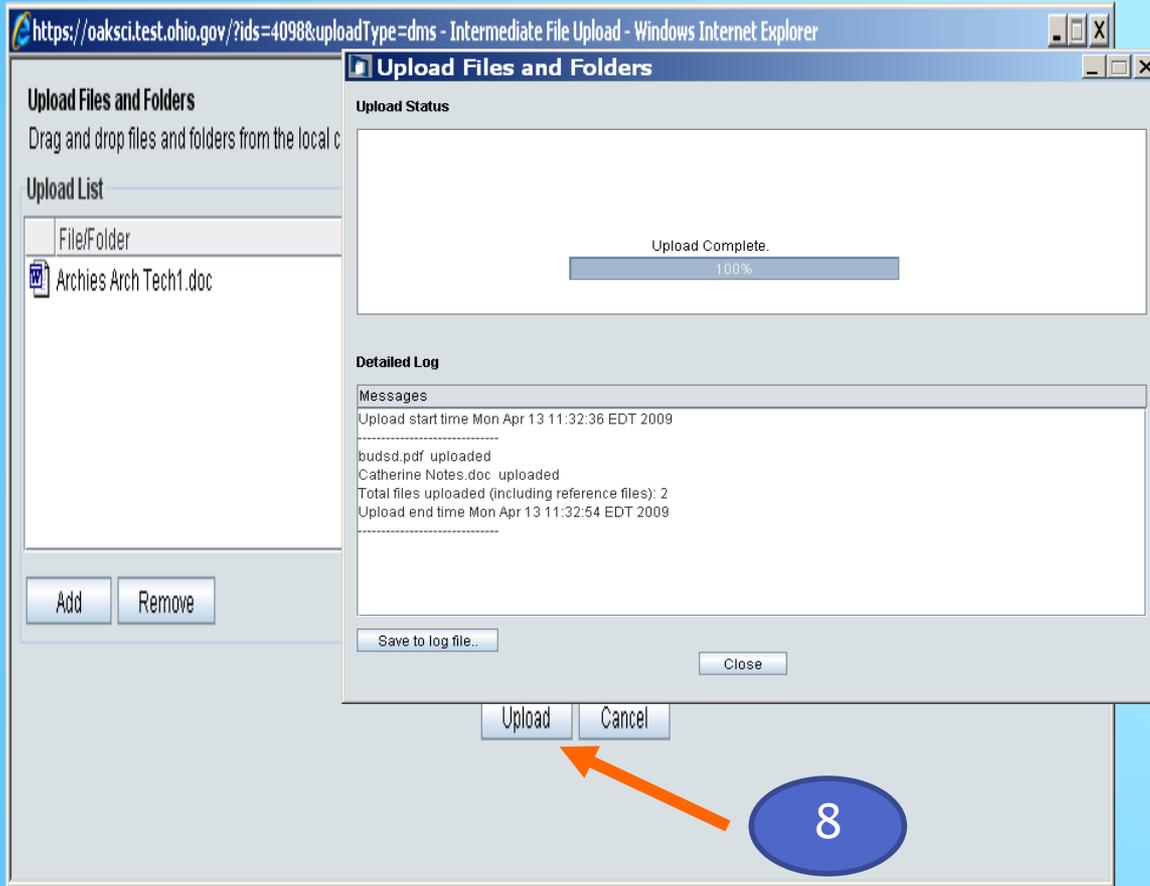
|  | Ref | BP | Name      | Size  | Upload Date | Owner  |
|--|-----|----|-----------|-------|-------------|--------|
|  |     |    | list1.csv | 10 KB | 01/31/2014  | Shauna |

# File Upload



- ▶ New Window Opens
- ▶ Click Add
- ▶ Choose file 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