



# **K-12 District Staff**

## **Welcome to OAKS CI**

# Job Aids

- ▶ For additional reference materials visit our website [ofcc.ohio.gov](http://ofcc.ohio.gov)
  - ▶ Click: Resources -> OAKS CI -> K-12 Training -> Choose Job Aid

This screenshot shows the OFCC Ohio.gov website. The navigation menu includes 'News / Events', 'Opportunities', 'Resources', and 'Gallery'. The 'Resources' menu is expanded, showing a list of items including 'OAKS CI'. A red arrow points from the 'OAKS CI' menu item to the 'K-12 Training' sub-menu item.

This screenshot shows the 'OAKS CI Training & Job Aids (K-12 Schools)' page. The page includes a navigation menu, a breadcrumb trail, and a table of training materials. A red arrow points from the 'K-12 Training' sub-menu item in the previous screenshot to the 'Introduction to Project Shells\*' row in the table.

Title	Recorded Presentation	Job Aid
Introduction to Project Shells*		
Configuring Computer to Use OAKS CI		
Document Manager		
Basic Project Process		
Responding to New Tasks		
Custom Prints		
Discussion Groups		

# What is OAKS CI?

## OAKS CI

(Capital Improvements Management System)

- ▶ Lifecycle management of capital projects
- ▶ Collaborative management tool that includes all of the project team
- ▶ Dynamic change management functionality that feeds budget management and project scheduling

# Benefits

- ▶ Improved project communication and collaboration
- ▶ Reduced potential for litigation
- ▶ Housed in the Cloud so you can utilize any browsing tool to access
- ▶ Automates workflows
- ▶ Automation of contract management and change order processing

# Where do we fit in?

## – School District Roles

The OAKS CI system:

- ▶ automates your manual processes
- ▶ Tracks your project progress
- ▶ is based on Ohio Facilities Construction Commission forms and procedures
- ▶ Gives you the ability to run reports in order to track vital information within your project

Contracts, Applications for Payment and other project records are created and processed within OAKS CI, however, purchase orders and vouchers (checks) are **recorded** in OAKS CI and still **processed** in your own financial system.

Some documents **still** require the pen and ink touch

- Agreements and Amendments
- Contracts, Field Work Orders, and Change Orders  
(electronic signature coming soon)

# School District Roles

School District staff currently have 5 roles available in the OAKS CI system:

- ▶ **Treasurer** role will see all records in OAKS CI, however, will touch the following:
  - ▶ Contracts and Amendments--provide resolution information and funding information will also attains signature from Superintendent or Board President
  - ▶ record Misc. Commits (purchases made outside of the current contracts housed within the project) and Misc. Invoices
  - ▶ record Purchase orders and Vouchers (checks)
  - ▶ Attach Voucher (check) to Application for Payment
  - ▶ provide funding certification for Change Orders
  - ▶ LFI MOU Funding Plan information

# School District Roles

- ▶ District Representative role will see all records in OAKS CI, however, will touch the following:
  - ▶ approve Applications for Payment
- ▶ Owner Financial role will see all records in OAKS CI, however, will touch the following:
  - ▶ Record Purchase Orders and Vouchers (checks)
  - ▶ Attach the Voucher (check) to Applications for Payment

# School District Roles

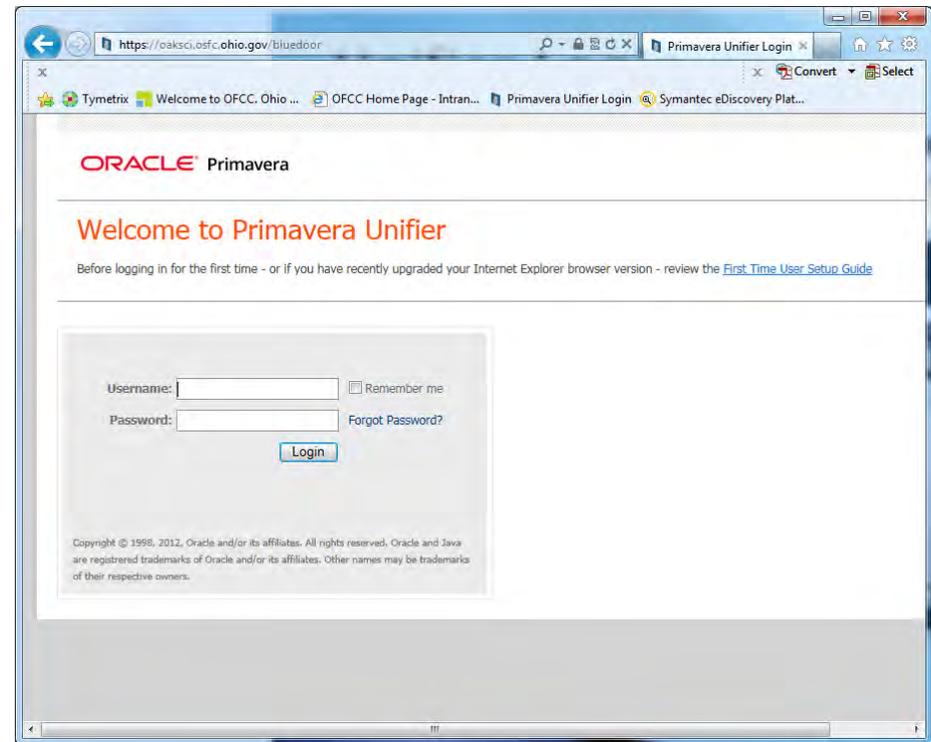
- ▶ District Superintendent role will see all records in OAKS CI, however, will touch the following:
  - ▶ Contracts and Contract Modifications in OAKS CI, however, will sign them outside of the system
  - ▶ provide District Acceptance for Change Orders
  - ▶ LFI MOU District Signature
- ▶ Owner View role:
  - ▶ This role allows members of the organization to view a project without being an active participant

# Navigating OAKS CI

# Navigate to OAKS CI

- Open Internet Explorer
- Navigate to: <https://oaksci.osfc.ohio.gov>
- 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 displays the Primavera Unifier web interface. At the top, the browser address bar shows the URL <https://oaksci.training.osfc.ohio.gov>. The user is identified as Shauna Hooks, with a last login time of 09/25/2013 02:02 PM. The navigation menu includes Home, Company Workspace, Projects, and School Facilities. The 'School Facilities' tab is selected, and a red arrow points to it with the label 'Cross project tabs'. The main content area is divided into several sections: 'Announcements' (with a red arrow pointing to it labeled 'Announcements'), 'Items Requiring Your Attention' (showing 42 total tasks, 34 new, and 5 late), 'Messages' (0 new), 'Draft Records' (10 new), and 'uMails' (3 new). Below these is a table titled '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

A red arrow points to the table with the label 'Projects with Active Tasks'.

# District and Building Level Access

The screenshot shows the Primavera Unifier web interface. The user is logged in as Shauna Hooks. The navigation tabs include Home, Company Workspace, Projects, and School Facilities. The 'View' menu is highlighted with a red arrow. A red box contains the text 'District and Building Level Project Access'. Below the menu, there are sections for Announcements, Items Requiring Your Attention (Tasks, Messages, Draft Records, uMails), and a table for 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 Level 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 School Facilities - Home School Facilities - Home View Dashboard My Dashboard

View: District Project

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
Napoleon-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

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

Double Clicking the District will take you to the district homepage

# Building Level Access

The screenshot shows the Primavera Unifier web application interface. The browser address bar displays the URL <https://oaksci.training.osfc.ohio.gov>. The user is logged in as Shauna Hooks. The application is in the 'School Facilities' section, and the current view is 'Building Project'. A table lists four building projects with columns for Number, Name, Setup Date, and Status.

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 Project view will allow you to view all School Districts you may access

Double Clicking the Building project will take you to the Building project's homepage

# 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

File Edit View Help

Central Elementary - Home View Dashboard My Dashboard

Summary

Image

Details

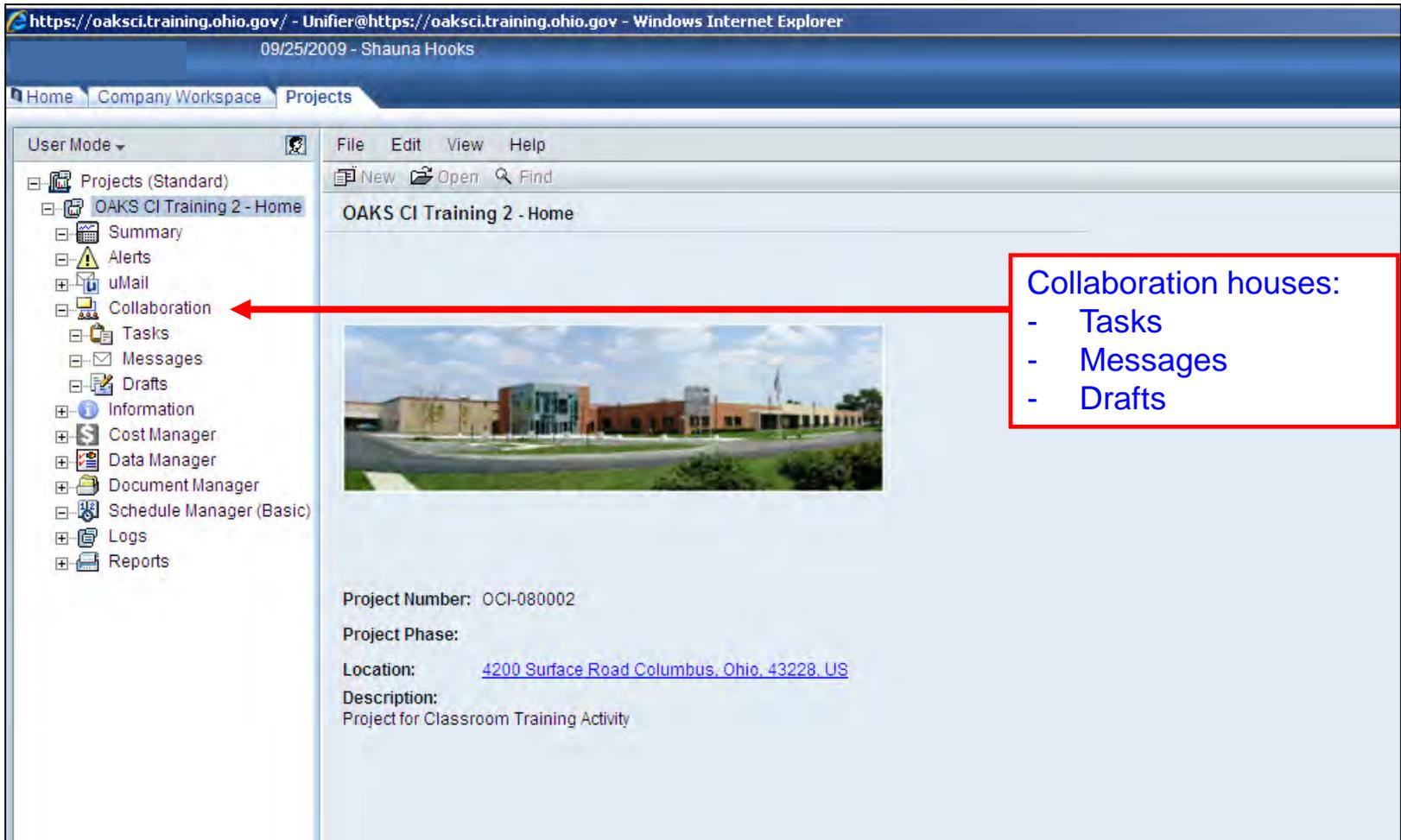
Number: SFC-130322.02  
Name: Central Elementary  
Description: New Elementary School  
Administrat Steve Mayo  
or:  
Currency: United States Dollar (USD)  
Status: Active  
Email 1015-  
Address: oaksci@soccemsmtp.em.ohio.gov

Collaboration- Your Work

Document Manager- Your supporting documentation

Logs- Where records are housed and created

# Collaboration– All About You!



The screenshot shows a web browser window with the URL <https://oaksci.training.ohio.gov/>. The page title is "OAKS CI Training 2 - Home". The navigation menu on the left includes "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". A red arrow points from the "Collaboration" menu item to a red-bordered box on the right. The main content area displays project details for "OAKS CI Training 2 - Home", including a photo of a building, "Project Number: OCI-080002", "Project Phase:", "Location: [4200 Surface Road Columbus, Ohio, 43228, US](#)", and "Description: Project for Classroom Training Activity".

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 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 (highlighted with a red arrow), Drafts, Information, Cost Manager, Data Manager, Document Manager, Schedule Manager (Basic), Logs, and Reports. The main content area displays a list of messages with columns for Type, From, Subject, and Received Date. The messages are:

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

A red arrow points from a text box to the 'Messages' folder in the sidebar. The text box contains the following text:

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

# Drafts

The screenshot shows a software application window with a navigation pane on the left and a main content area on the right. The navigation pane is expanded to show the 'Drafts' folder under 'OAKS CI Training 2 - Home'. A red arrow points from a text box to the 'Drafts' folder. The main content area displays a list of 11 draft items in a table format.

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

# 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 a web application interface for 'oaksci.training.ohio.gov'. The left sidebar contains a navigation menu with various categories, and 'Logs' is circled in red. The main content area displays a table of 'Design Reviews' with the following data:

Record No	Stage	Completion Status	Creation Date	Est. Construction Cost (\$)	Status
DR-0008	Design Development	Final	12/04/2009	0.00	Pending
DR-0007	Schematic Design	50% (CD Only)	10/19/2009	0.00	Pending
DR-0006	Program Verification	85 - 95% (CD Or	10/08/2009	0.00	Pending
DR-0005	Design Development	50% (CD Only)	10/08/2009	0.00	Accepted
DR-0004	Schematic Design	50% (CD Only)	10/07/2009	400,000.00	Pending
DR-0003	Program Verification	50% (CD Only)	10/07/2009	0.00	Pending
DR-0002	Program Verification	Final	12/05/2008	13,333.00	Pending
DR-0001	Program Verification	Final	12/05/2008	12,000.00	Accepted

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

# Records and Tasks

# 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](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 \*

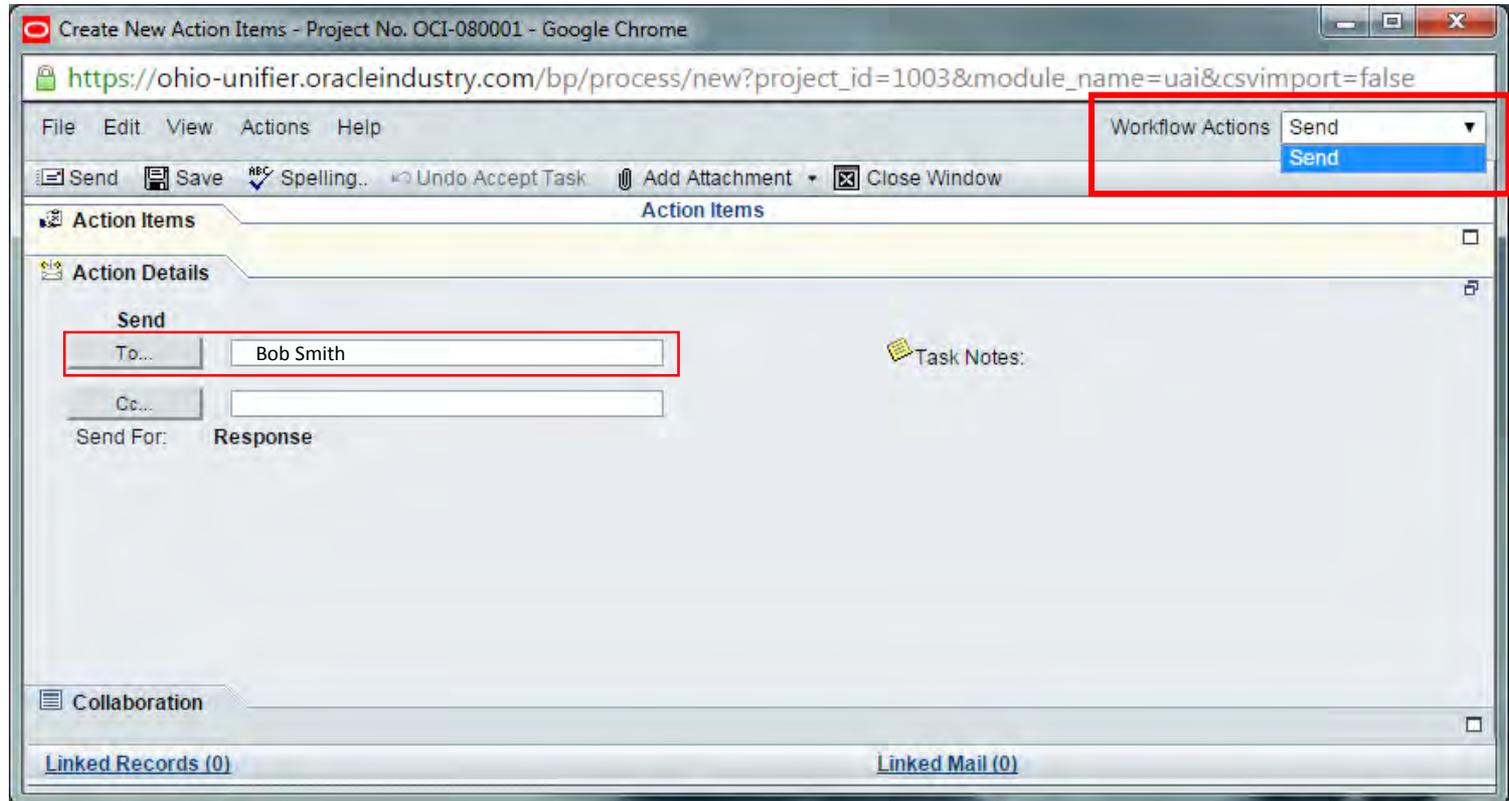
Action Details

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 I	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	C SOV-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	C SOV-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

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)

Cc:

Sent For: Initial Review

### Design Reviews

Attachment Index : (3)

Display Attachments with Comments by: All

New Rename Move Delete 3 Item(s) 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)

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](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" workflow action. The "To..." field contains the text "Becky Bessell, Consultant Student1, Consulta". The "Task Due" is "12/19/2009". The "Send For:" field contains "Detailed Review".

Red annotations include:

- A red circle around the "Send" button in the browser menu bar, with a red arrow pointing to it and a text box containing "3) Click Send".
- A red arrow pointing from the "To..." field to a text box containing "2) Click the 'To' box and choose the next person to get the task".
- A red-bordered text box containing the note: "Note: When Workflow action is selected the Action Details (To: box) tab updates".

At the bottom of the page, there are tabs 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 data table on the right. The navigation pane lists various project-related items, with 'Logs' and 'Professional Services Pay Request' circled in red. The main table, titled 'Professional Services Pay Request - Current View: All', shows two records. A red arrow points to the 'Status' column of the second record.

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](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:

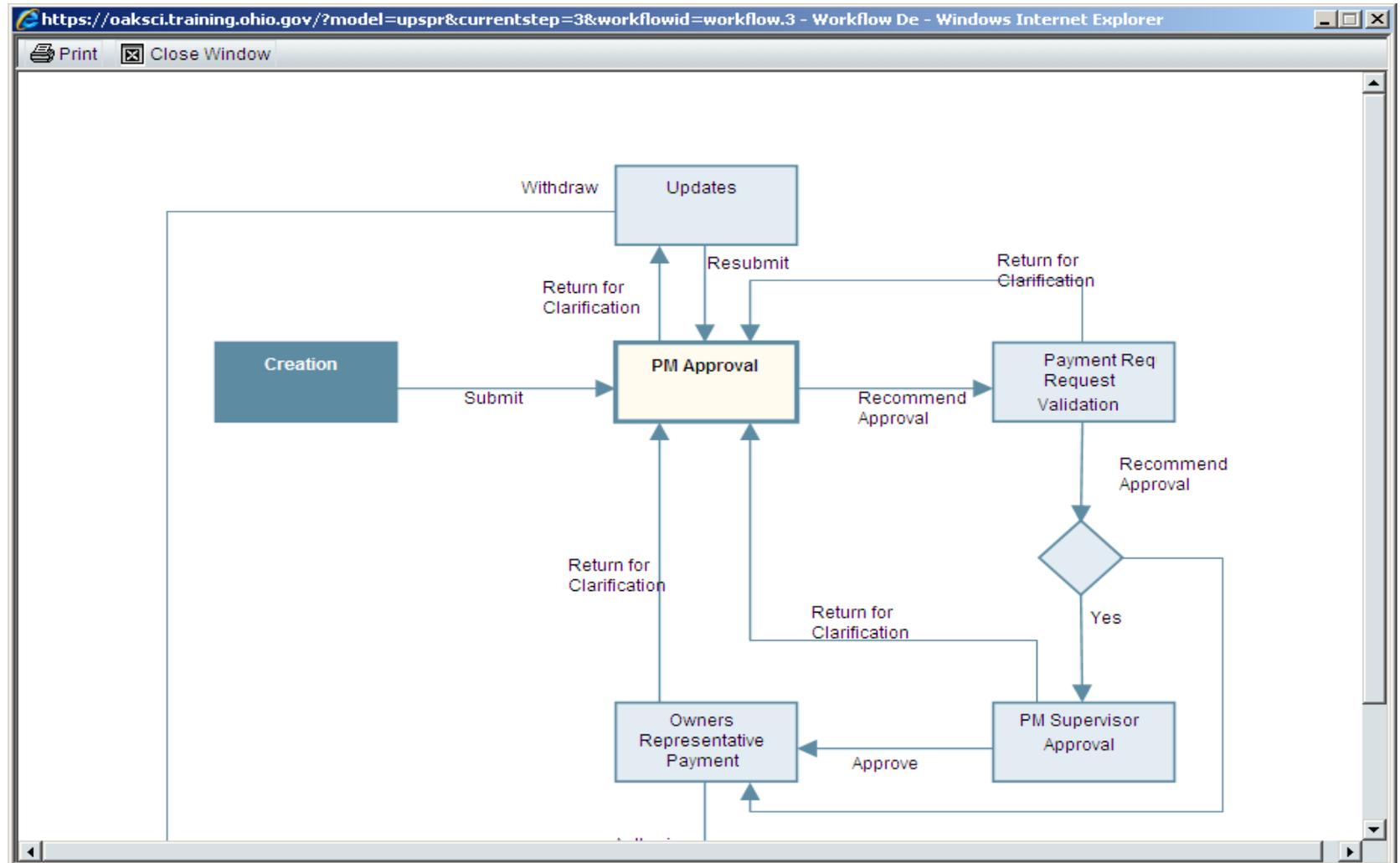
Step Name	Completion Rule	Status
<a href="#">Creation</a>	Any User	Completed
<a href="#">PM Approval</a>	Any User	Completed
<a href="#">Updates</a>	Any User	Not Started
<a href="#">PM Supervisor Approval</a>	Any User	Not Started
<a href="#">Owners Representative Payment Authorizal</a>	Any User	Completed
<a href="#">Payment Request Validation</a>	Any User	Completed
<a href="#">Payment Process</a>	Any User	Not Started
<a href="#">End</a>	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

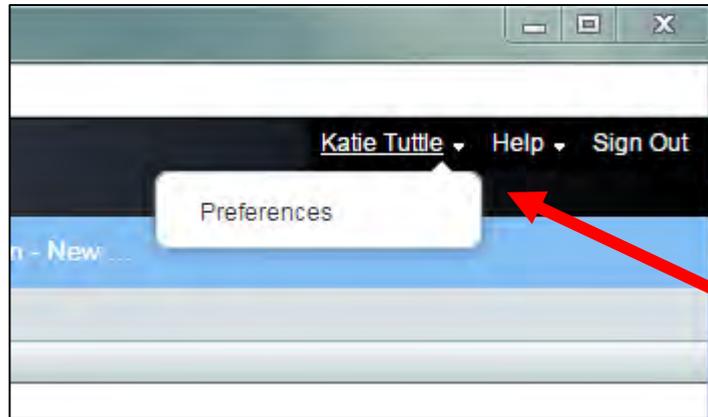


# Document Manager

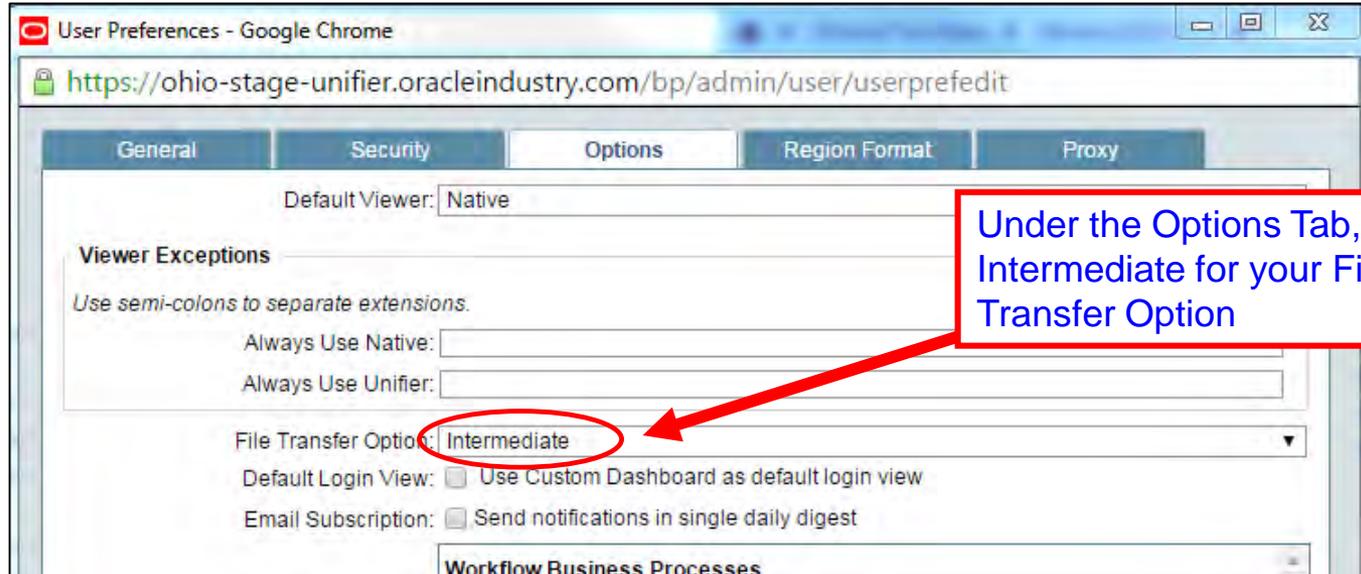
# About Document Manager

- ▶ Document Manager houses all of your supporting documentation
- ▶ All documents must be uploaded into Document Manager first before they can be attached to a record
- ▶ Provides a platform for maintaining a wide variety of files and documents
- ▶ Ensures that project participants are always working on the most current versions
- ▶ Provides ready access to all documents from anywhere at any time

# Upload into Document Manager



Before uploading, check your File Transfer Preferences by clicking your name at the right hand corner of your page and choose Preferences



Under the Options Tab, select Intermediate for your File Transfer Option

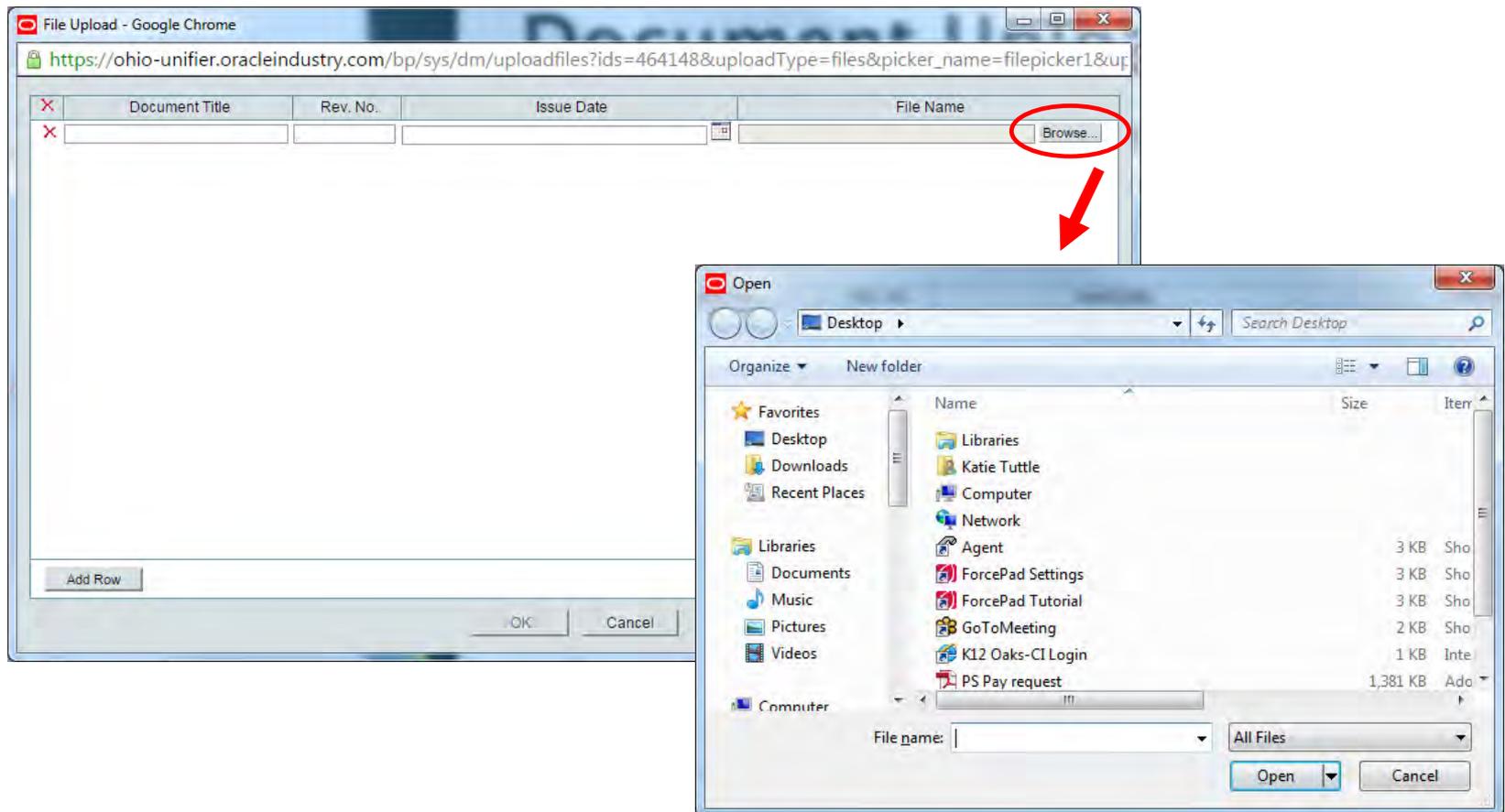
# Document Upload

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 of "09/04/2015 04:51 AM". The navigation menu includes "Home", "Warren Full Servic...", "William Green Fire...", "Lausche Building 5...", "Company Workspace", and "Delaware Training ...". The "Documents" section is active, showing a tree view of folders under "Current Phase". A red box labeled "Choose folder" points to the "0250 Bid & Award" folder. A red box labeled "Click Upload" points to the "Upload" button in the toolbar. The toolbar also includes "Open", "Find", "Download", "Delete", "Check Out", "Comments", "Permissions", and "Properties". The main content area displays a table of 17 items:

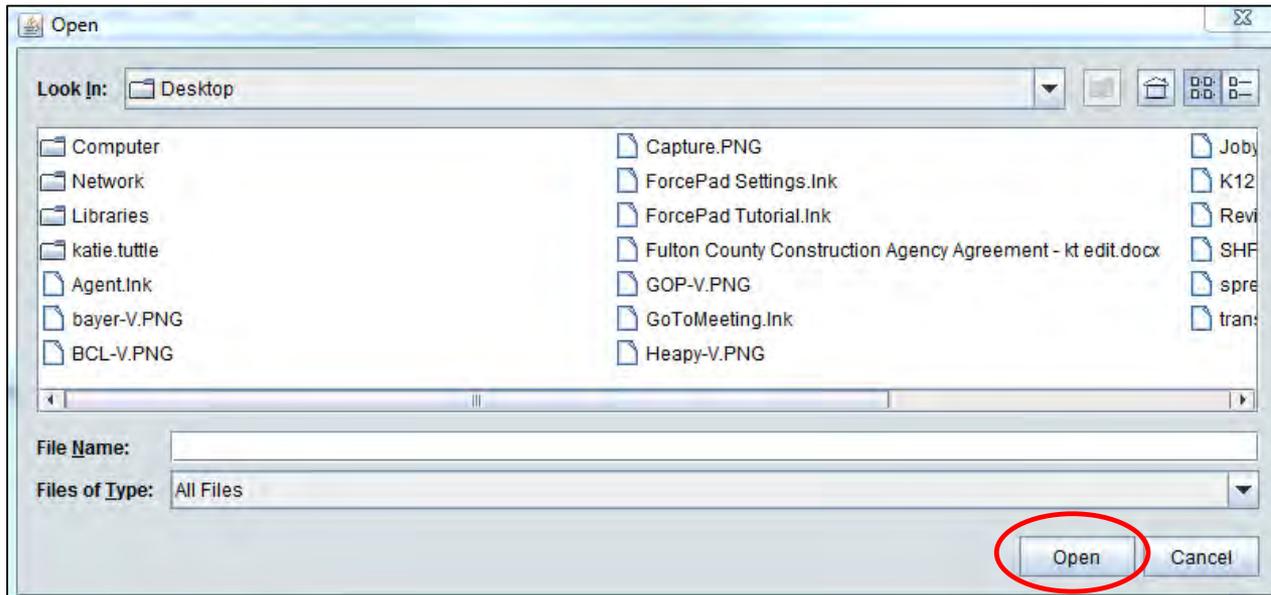
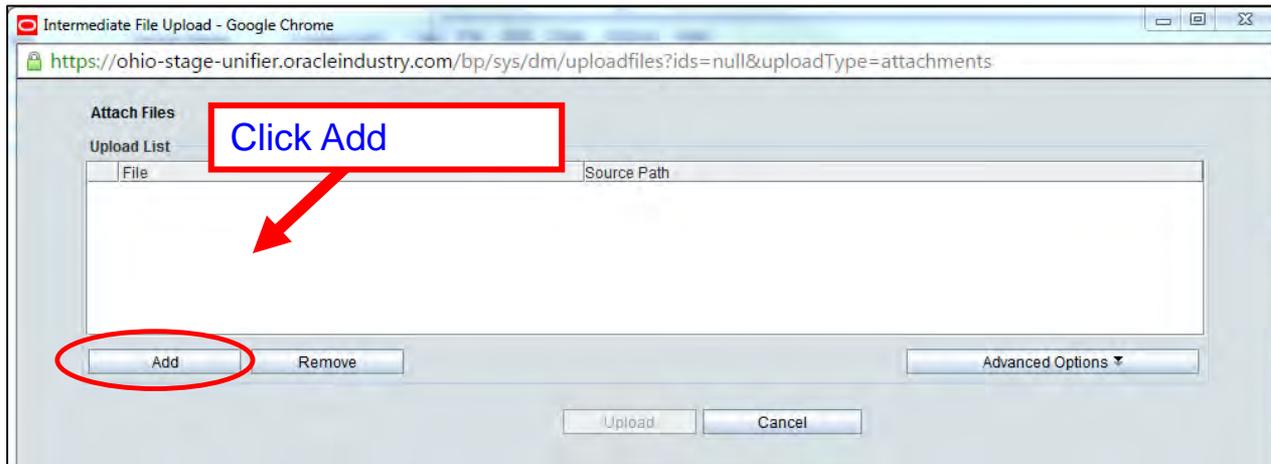
	Ref.	BP	Name	Size	Upload Date	Owner	Title	Rev.No.
			0000 Concept Development			Steve Mayo		
			0100 Acquisition			Steve Mayo		
			0200 Design			Steve Mayo		
			0250 Bid & Award			Steve Mayo		
			0300 Construction			Steve Mayo		
			0310 Contracts			Steve Mayo		
			0320 Schedule			Steve Mayo		
			0330 Contractor Pay			Steve Mayo		
			0400 Post Construction			Steve Mayo		
			0500 Extra Services			Steve Mayo		
			0600 Budget			Steve Mayo		
			6112.00-20587.pdf	38 KB	06/29/2015	Sue Williams		
			6112.00-20648.pdf	38 KB	07/29/2015	Sue Williams		

# Document Upload–Basic

- ▶ If you get an error message or a blank screen when attempting to upload your documents, you may need to change your **File Transfer Option** to **Basic** in your **Preferences**.
- ▶ With Basic upload, you can only add one document at a time



# Document Upload– Intermediate



# Document Upload– Intermediate

Intermediate File Upload - Google Chrome

<https://ohio-stage-unifier.oracleindustry.com/bp/sys/dm/uploadfiles?ids=null&uploadType=attachments>

Attach Files

Upload List

File	Source Path
GOP-V.PNG	C:/Users/katie.tuttle/Desktop/GOP-V.PNG

Add Remove Advanced Options ▾

Upload Cancel

You should see your document here

Click Upload. You will now have your document available in Document Manager.

# Document Upload

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL: <https://ohio-unifier.oracleindustry.com>. The page title is "ORACLE PRIMAVERA UNIFIER" and the user is logged in as "Proxy for Katie Tuttle". The navigation pane on the left shows the "Documents" folder selected under "Document Manager". The main content area displays a table of documents for the "0350 Contract Modifications" phase. A red arrow points to the table with a text box that says "You should see your document here".

Ref.	BP	Name	Size	Upload Date	Owner	Title	Rev.No.	Issue Date
		Change Order Summary by	2 KB	11/04/2013	Rita Nichols			
		Change Order, Report.pdf	6 KB	11/04/2013	Rita Nichols			

- ▶ Now that your documents have been uploaded into Document Manager they can now be attached to Records (BPs)

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211