

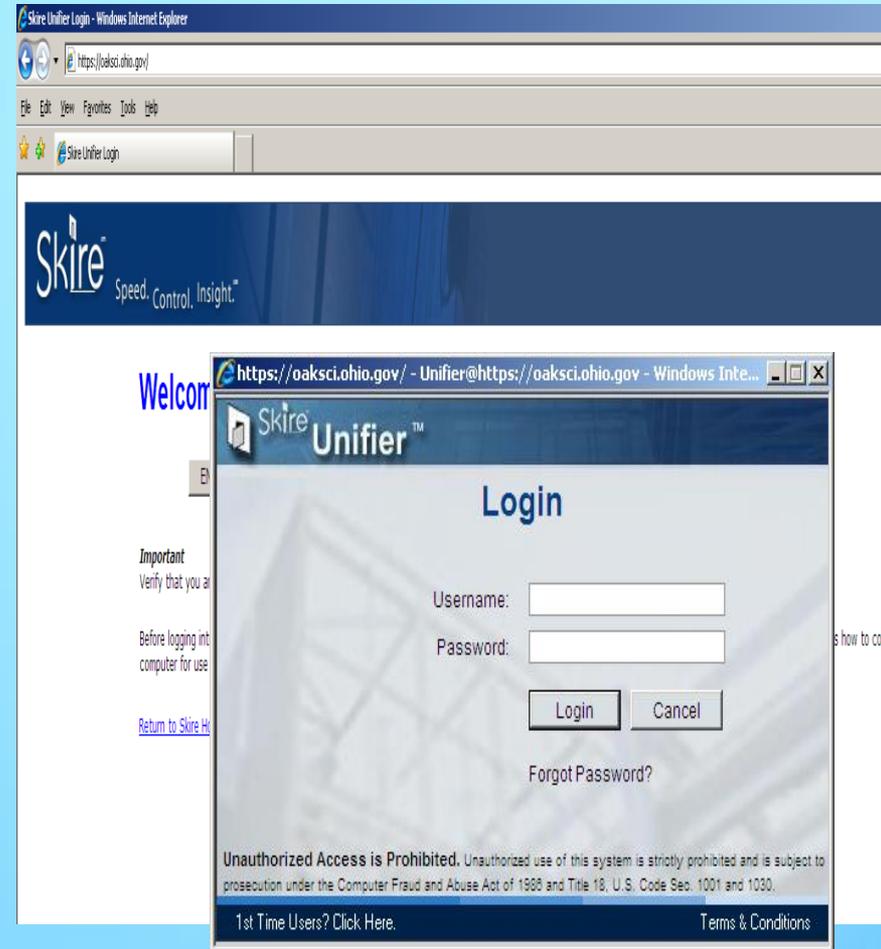
OAKS CI

Capital Improvements (Management System)

K12 OAKS CI Basics

Unifier Login

- ▶ Open Internet Explorer
- ▶ Navigate To
<https://oaksci.osfc.ohio.gov>
- ▶ Username:
your assigned user name
- ▶ Password:
your assigned password
- ▶ Click “Login”



Cross Project Home Page

The screenshot shows the Primavera Unifier web interface. The browser address bar indicates the user is logged in as Shauna Hooks. The interface has tabs for Home, Company Workspace, Projects, and School Facilities. A left sidebar shows navigation options like Home, Tasks, Messages, Drafts, and uMail. A top navigation bar includes 'User Mode' and a profile icon, which is highlighted by a red arrow and a box labeled 'Cross project tabs'. The main content area is divided into sections: 'Announcements' (with a red arrow and box labeled 'Announcements'), 'Items Requiring Your Attention' (listing tasks, messages, draft records, and uMails), and a table titled 'Tasks or New uMails:'. The table lists various projects and buildings with their task counts and status (New, Late). A red arrow points to the '2 Late' status in the first row, which is highlighted by a red box labeled 'Projects/Buildings with Active Tasks'.

ORACLE Primavera Unifier Shauna Hooks (Last login: 09/25/2013 02:02 PM) Community Bookmarks Preferences Support Logout

Home Company Workspace Projects School Facilities

User Mode [Profile Icon]

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

District and Building Level Access

The screenshot shows the Primavera Unifier web interface in Internet Explorer. The browser address bar shows 'Unifier@https://oaksci.training.osfc.ohio.gov'. The user is identified as 'Shauna Hooks (Last login: 09/25/2013 02:02 PM)'. The navigation menu includes 'Home', 'Company Workspace', 'Projects', and 'School Facilities'. The 'School Facilities' tab is active. A red arrow points from a text box to the 'View' menu item. The text box contains the text 'District and Building Level Project Access'. The main content area displays 'Announcements' and 'Items Requiring Your Attention' with statistics for Tasks (42 Total, 34 New, 5 Late) and Messages (0 New). Below this 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

District 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 navigation menu includes Home, Company Workspace, Projects, and School Facilities. The main content area is titled "School Facilities - Home" and features a "View Dashboard" button and a "My Dashboard" dropdown menu. A red box highlights the text: "District view will allow you to view all School Districts you may access". Below this, a "View: District Project" dropdown menu is visible. The main content area displays a table of district projects with the following data:

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

A red arrow points from the "District Project" dropdown menu to the table. Another red arrow points from the table to a red box containing the text: "Double Clicking on the District will take you to the district home page".

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 Project View will allow you building Level Access

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

District/Building Project Home Page

The screenshot shows a web application interface for 'Central Elementary - Home'. The interface includes a navigation menu on the left with items like Alerts, uMail, Collaboration, Information, Data Manager, Document Manager, Logs, and Reports. The main content area is titled 'Central Elementary - Home' and features a 'Summary' tab, an 'Image' placeholder, and a 'Details' section. The 'Details' section contains 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

On the right side of the interface, there is a section titled 'Items Requiring Your Attention' with the following data:

Tasks:	0, New 0, Late 0
Messages:	0 New
Draft Records:	0 New
Mails:	0 New

Below this section are two links: [Ohio Facilities Construction Commission](#) and [Ohio School Facilities Commission](#). A red box highlights the 'Summary' tab with the text 'Building/Project Specific Home Page'.

District/Building Project Home Page

The screenshot shows the Primavera Unifier web application interface. The browser title is "Unifier@https://oaksci.training.osfc.ohio.gov - Windows Internet Explorer". The user is Shauna Hooks, with a last login of 10/08/2013 09:21 AM. The application is in "User Mode" and displays the "Central Elementary - Home" project page. The left navigation pane includes: Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. The main content area is titled "Central Elementary - Home" and includes a "Summary" tab, an "Image" placeholder, and a "Details" section. The "Details" section contains the following information:

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

On the right side of the main content area, there is a section titled "Items Requiring Your Attention" with the following data:

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

Below this section is a "Links" area with two links: "Ohio Facilities Construction C" and "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

Collaboration- all about you!

s://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer

Unifier™ 09/25/2009 - Shauna Hooks

Company Workspace Projects

Mode ▾

File Edit View Help

New Open Find

OAKS CI Training 2 - Home

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
 - Reports



Collaboration houses, Tasks, Messages and Drafts

Project Number: OCI-080002

Project Phase:

Location: [4200 Surface Road Columbus, Ohio, 43228, US](#)

Description: Project for Classroom Training Activity

Tasks

https://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer

Skire™ Unifier™ 09/25/2009 - Shauna Hooks

Home Company Workspace Projects

User Mode

File Edit View Help

New Open Find

Tasks - Current View: All

10 Item(s)

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 App		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

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
- Reports

Annotations:

- Blue arrow points from "User Tasks" box to the "Tasks" folder in the left sidebar.
- Red arrow points from "Late Tasks" box to the "Request for RFI-00007" row in the table.
- Black arrow points from "Unopened Tasks" box to the "Subcontract SSD-0009" row in the table.
- Black arrow points from "Opened Tasks" box to the "Request for RFI-00007" row in the table.

User Tasks

Late Tasks

Opened Tasks

Unopened Tasks

Messages

https://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer

Skire™ Unifier™ 09/25/2009 - Shauna Hooks

Home Company Workspace Projects

User Mode

- 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
 - Reports

File Edit View Help

New Open Find Delete

Messages - Current View: All

12 Item(s)

Type	From	Subject	Received Dat
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 Widgits	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	CSOV-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	CSOV-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

11

Drafts

https://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer

Skire™ Unifier™

09/25/2009 - Shauna Hooks

Home Company Workspace Projects

User Mode



File Edit View Help

New Open Find Delete

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

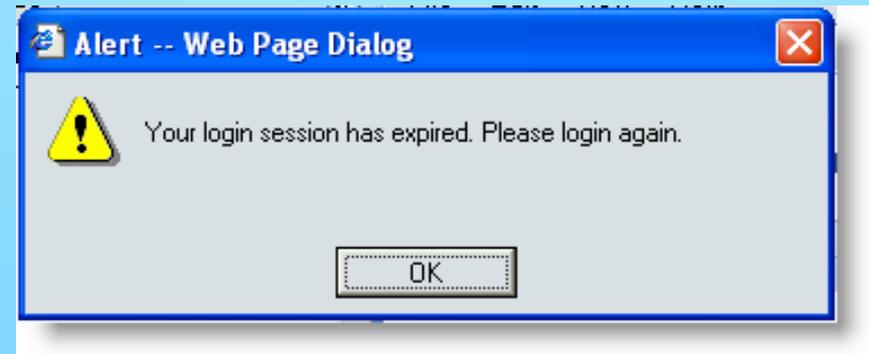
Unfinished records you have created

Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

- Must touch server within 60 minutes
- All unsaved work lost
- No warning given

Use Save to save
a draft to the
server if needed



Logs --house BP Records

https://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer

Skire™ Unifier™ 12/09/2009 - Shauna Hooks

Home Company Workspace Projects

User Mode

File Edit View Help

New Copy Open Find Import Export Template

Design Reviews - Current View: All

8 Item(s)

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	Prog			12,000.00	Accepted

Projects (Standard)

- OAKS CI Training 2 - Home
 - Summary
 - Alerts
 - uMail
 - Collaboration
 - Information
 - Cost Manager
 - Data Manager
 - Document Manager
 - Schedule Manager (Basic)
 - Logs
 - 72 Hour Notice
 - Action Items
 - Advertisements
 - Associate A/E Evaluation
 - Budget - Initial
 - Budget - Revisions
 - Change Order
 - Closeout - Contractor
 - Closeout - Professional Services
 - Contract
 - Contract Schedule of Values
 - Contractor Evaluations
 - Contractor Pay Request
 - Design Reviews
 - Escrow Accounts

Users will see the types of records for which they have permissions

How do RECORDS WORK?

- ▶ Predefined Activity
- ▶ Consists Of:
 - *Forms---record created by user*
 - Workflows
 - Data

Forms

Used To:

- Create and store information in OAKS CI
- Review information throughout project lifecycle

Create New Submittals - Project No. TRNG-2007-00001 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add LI Remove LI Comments Download Discussion

Submittals

General

Organization: Record Number:

Project Number: TRNG-2007-00001 Creator: [Ohio Instructor](#)

Project Name: Ohio Training Project Creation Date:

Project Location: xngg Status:

Title: * Due Date: 11/18/2007 03:04 PM Local (GMT-4)

Action Details

Create New Submittals

To...

Cc...

Send For:

Task Notes:

Attachment Index : (0) Display Attachments with Comments by: All

New Rename Move Delete 0 Item(s) Page 1 of 1 Display 100 items per page

	Name	Type	Line Item Status	Variation?
0 Item(s)				

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

Form Content – Links

[Attachments \(0\)](#)

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

[General Comments](#)

[Linked uMails \(0\)](#)

▶ Attachments

- Shows count of files attached from upper form
- Click to open and view attachments

▶ Linked Records

- Shows count of other business process records linked to this record (example: Request for Interpretation)
- Click to open and view linked records

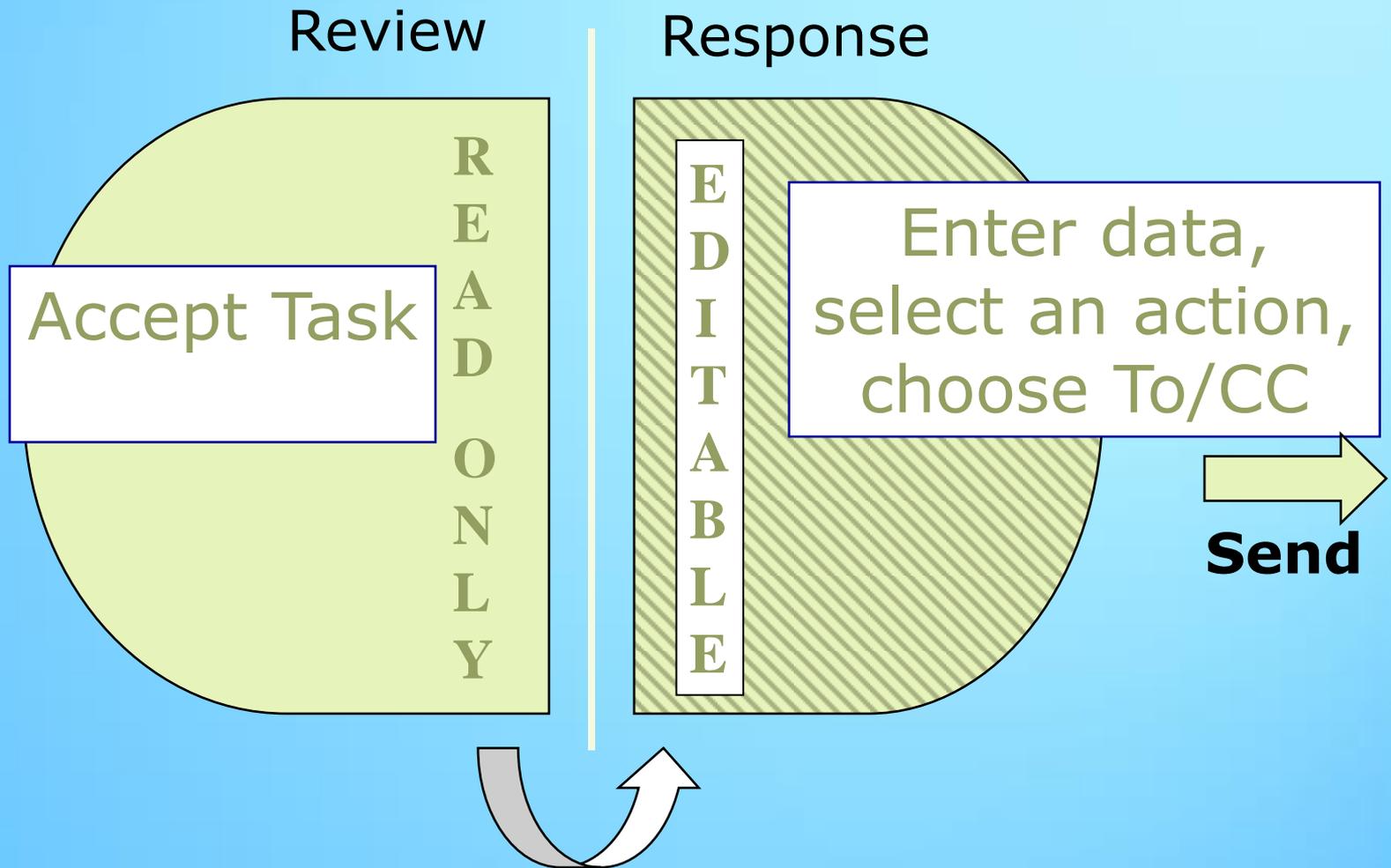
▶ General Comments

- Indicates if general comments or discussion group comments have been added
- Click to open and view comments

Business Process Definition

- ▶ Predefined Activity
- ▶ Consists Of:
 - Forms
 - *Workflow---record is received by user as a Task*
 - Data

Phases Of A Task



The Review Phase

Oracle Primavera
 Home Company Workspace Projects

User Mode

File Edit View Help

New Open Find

Tasks - Current View: All

104 Item(s) Page 1

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Design Reviews	DR-000			Shauna Hook	Initial Review	12/12/2009	12/09/2009
Design Reviews	DR-000			Shauna Hook	Initial Review	12/07/2009*	12/04/2009
Professional Services /	Amend-00	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	Todays 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 Archit		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

The Review Phase

21

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

General

Design Reviews

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-0
Creator: Shauna
Creation Date: 12/09
Status: Pending
Owner Name: North Central State College

Task Details

From: Shauna Hooks; Task Due Date: 12/12/2009
To: Project Manager;Becky Bessell; More.. Task Status: Not Started
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)

Temporary note that will go **only** to the next person in the workflow

Click to Add a Task Note

The Response Phase

22

https://oaksci.training.ohio.gov/?srcid=26&model=udr&fromcostlog=1&project_id=1009 - Design Rev - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions - Select-

- Select-
Return For Clarification
Send For Detailed Review

Design Reviews

General

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:

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		Submitted
done.txt		Submitted
dell.sdr		Submitted

Add Copy Import Re Comments Download Find

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

General comments will be permanent to the record

Click to Add a General Comment

The Response Phase

https://oaksci.training.ohio.gov/?srcid=26&model=udr&fromcostlog=1&project_id=1009 - Design Rev - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Send For Detailed Review

Send Save Spelling... Discussion

General Design Reviews

Action Details

Send For Detailed Review (Click here to view latest content)

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

Cc...

Send For: Detailed Review

Note: When Workflow action is selected the Action Details (To: box) tab updates

Design Reviews

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

Finding the Record Status

https://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer
Skire™ Unifier™ 12/09/2009 - Shauna Hooks

Home Company Workspace Projects

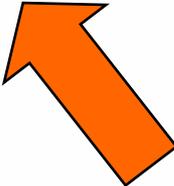
User Mode

File Edit View Help
New Copy Open Find Import Export Template

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

Title	Agreement Name	Provider	Amount	Final Payment?	Status	Record Number
Gary's 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

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
72 Hour Notice
Action Items
Advertisements
Associate A/E Evaluation
Budget - Initial
Budget - Revisions
Change Order
Closeout - Contractor
Closeout - Professional Services
Contract
Contract Schedule of Values
Contractor Evaluations
Contractor Pay Request
Design Reviews
Escrow Accounts
Field Reports
Financial Risks
Fund Allocation
Fund Release
Fund Transfers
Liens
Local Administration Authorization R
Meeting Minutes
Memorandum of Understanding
Miscellaneous Commit
Miscellaneous Invoice
Prevailing Wage Report
Professional Services Acquisition
Professional Services Agreements
Professional Services Amendments
Professional Services Fee Award and
Professional Services Pay Request
Program of Requirements
Punch Lists
Purchase Orders



Finding the Record Status

25

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

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:

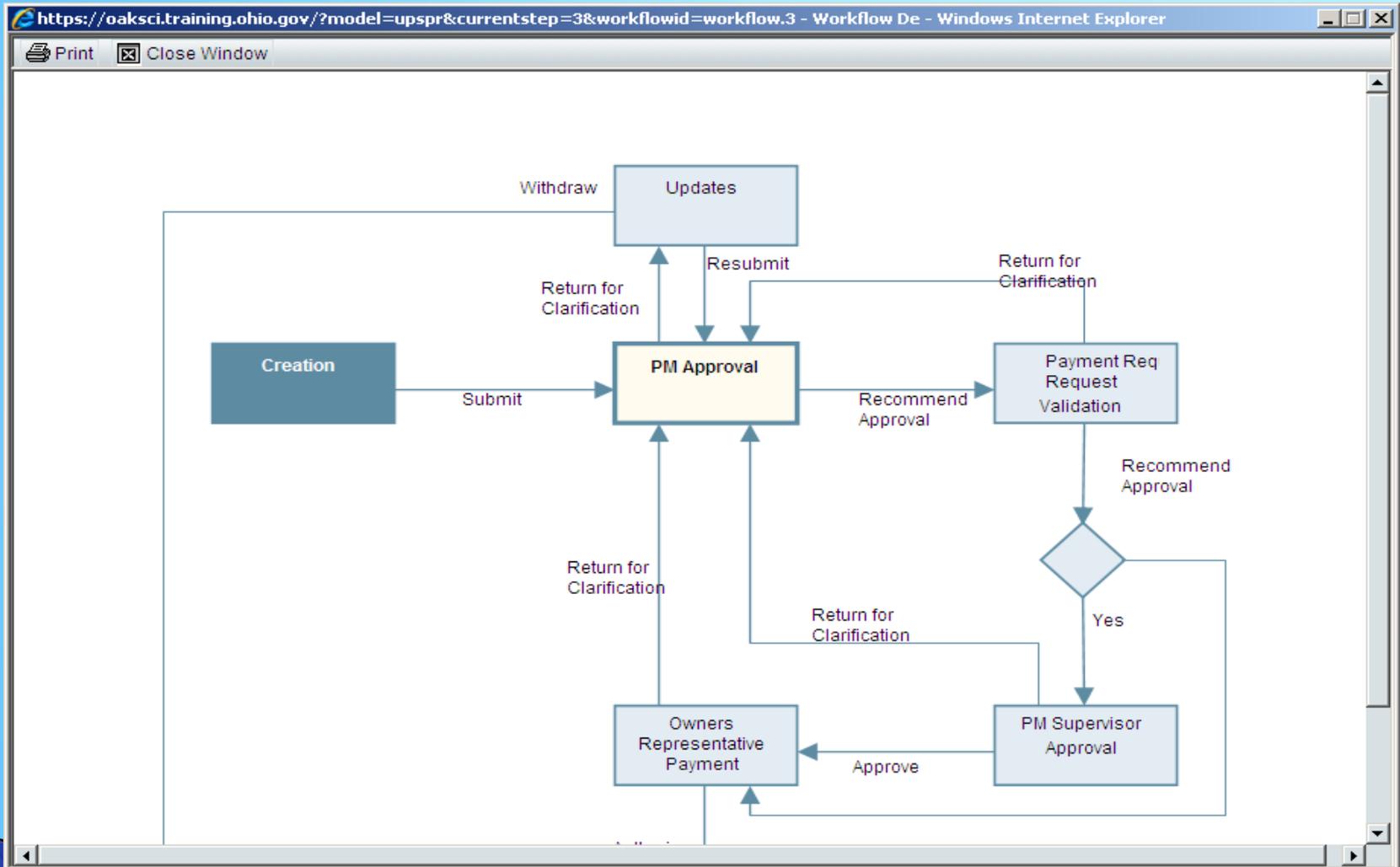
Step Name	Completion Rule	Status
Creation	Any User	Completed
PM Approval	Any User	Completed
Updates	Any User	Not Started
PM Supervisor Approval	Any User	Not Started
Owners Representative Payment Authorizal	Any User	Completed
Payment Request Validation	Any User	Completed
Payment Process	Any User	Not Started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

[View Graphic...](#) [Close](#)

Graphic View of Workflow



Document Manager

Features and Functionality

About Document Manager

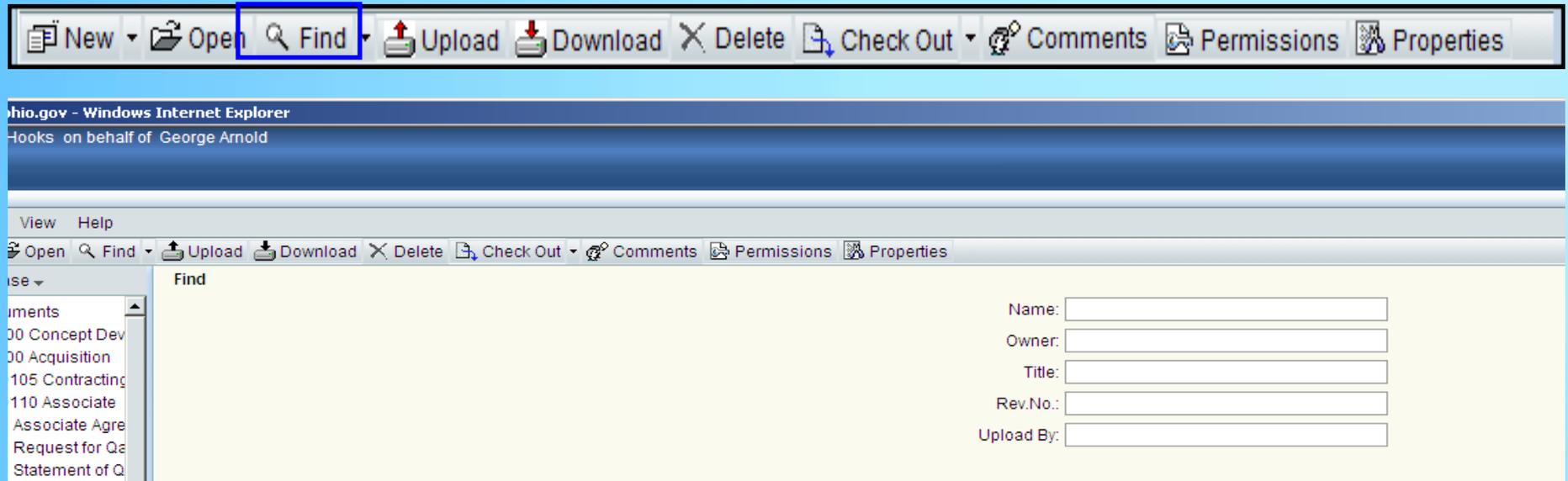
- ▶ Provides a platform for maintaining a wide variety of files and documents
- ▶ Ensures that project participants are always working on the most current versions
- ▶ Provides ready access to all documents from anywhere at any time
- ▶ Integrated with business processes and the user-defined reports module
- ▶ Files uploaded into the Document Manager are stored on the OAKS CI file server

Project Folder Structure

The screenshot displays the Primavera Unifier web interface. The left sidebar contains a navigation menu with items like Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Documents, Logs, and Reports. An orange arrow points to the 'Documents' item. The main content area shows a tree view of folders under 'Current Phase'. The 'Contract' folder is highlighted with an orange box. An orange arrow points from the 'Contract' folder to a table listing a file named 'Four Seasons .pdf'. A red box contains the text 'Documents and folders within folders'.

Ref	BP	Name	Size	Upload Date	Owner	Title
		Four Seasons .pdf	3 MB	05/19/2014	Deborah Caudle	Four Seasons Cc

Find Documents

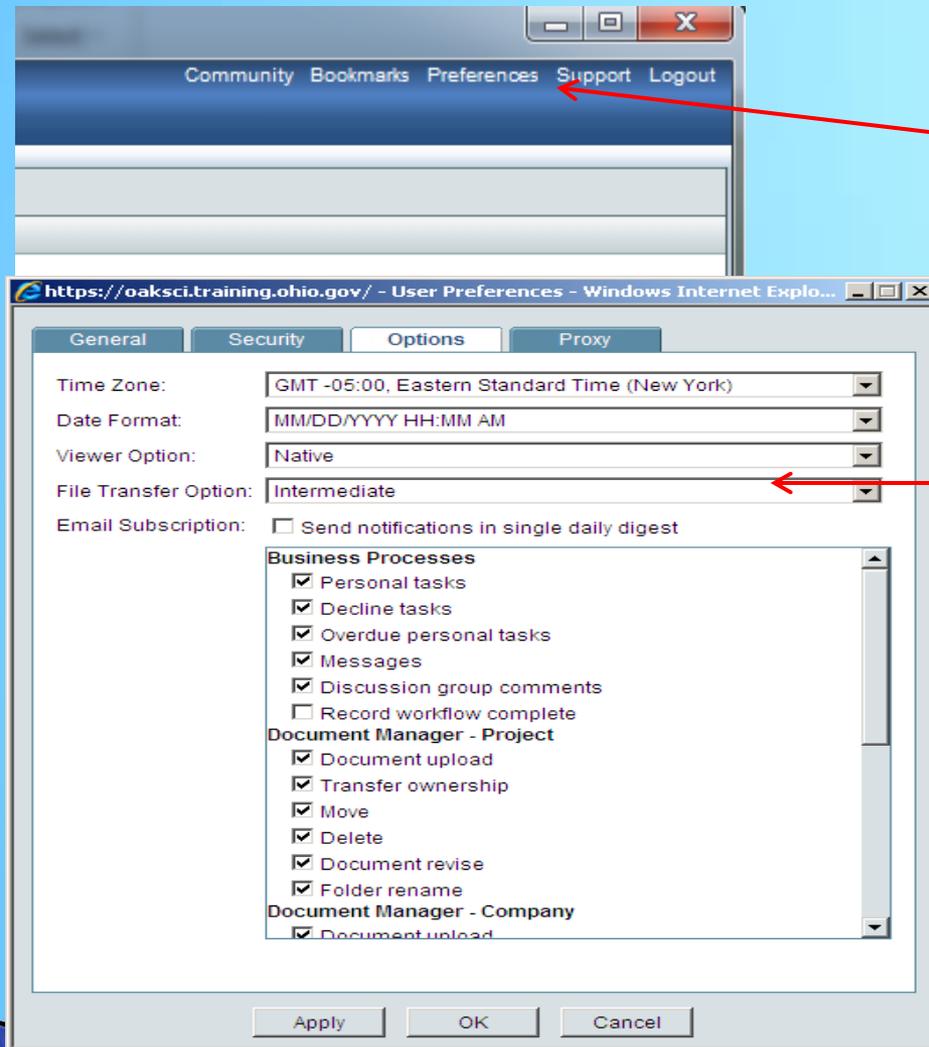


- ▶ Supports searches for data within data and keyword search within documents
- ▶ Supports search based on file content
- ▶ Search includes earlier versions

Document Management

- ▶ Document Upload

File Transfer Preferences



- Prior to uploading ensure that your Preferences are correct
- Intermediate or Basic file transfer option

Upload

2) Click Upload

1) Choose folder

The screenshot shows a web application interface for file management. The top window is a file explorer for 'OAKS CI Training 1 - Home' with the 'Arch' folder selected. The bottom window is an 'Intermediate File Upload' dialog with an empty 'Upload List' table.

File Explorer (Top Window):

- Address bar: <https://oaksci.training.ohio.gov/> - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer
- Page title: 12/09/2009 - Shauna Hooks
- Navigation: any Workspace | Projects
- Menu: File Edit View Help
- Toolbar: New Open Find Upload Download Delete Check Out Comments Permissions Properties
- Current Phase: Documents
 - 0000 Concept Develo
 - 0100 Acquisition
 - 0200 Design
 - 0210 Program Verif
 - Drawings PDF
 - Arch (Selected)
 - Civil
 - mep
 - Stru

Ref	BP	Name	Size	Upload Date	Owner	Title
		A-1CONFORMED.pdf	397 KB	03/13/2008	Oaks Student 1	
		A1-1.pdf	561 KB	03/13/2008	Oaks Student 1	
		A2-1.pdf	708 KB	03/13/2008	Oaks Student 1	
		A2-2.pdf	1017 KB	03/13/2008	Oaks Student 1	
		A3-1.pdf	443 KB	03/13/2008	Oaks Student 1	
		A4-1.pdf	539 KB	03/13/2008	Oaks Student 1	
		A5-1.pdf	327 KB	03/13/2008	Oaks Student 1	

Intermediate File Upload (Bottom Window):

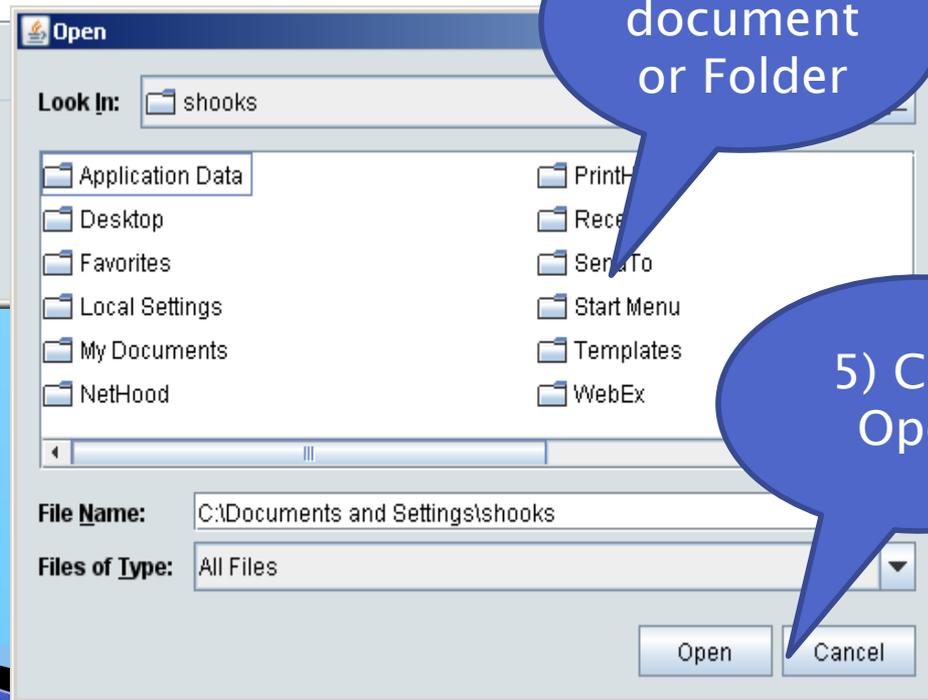
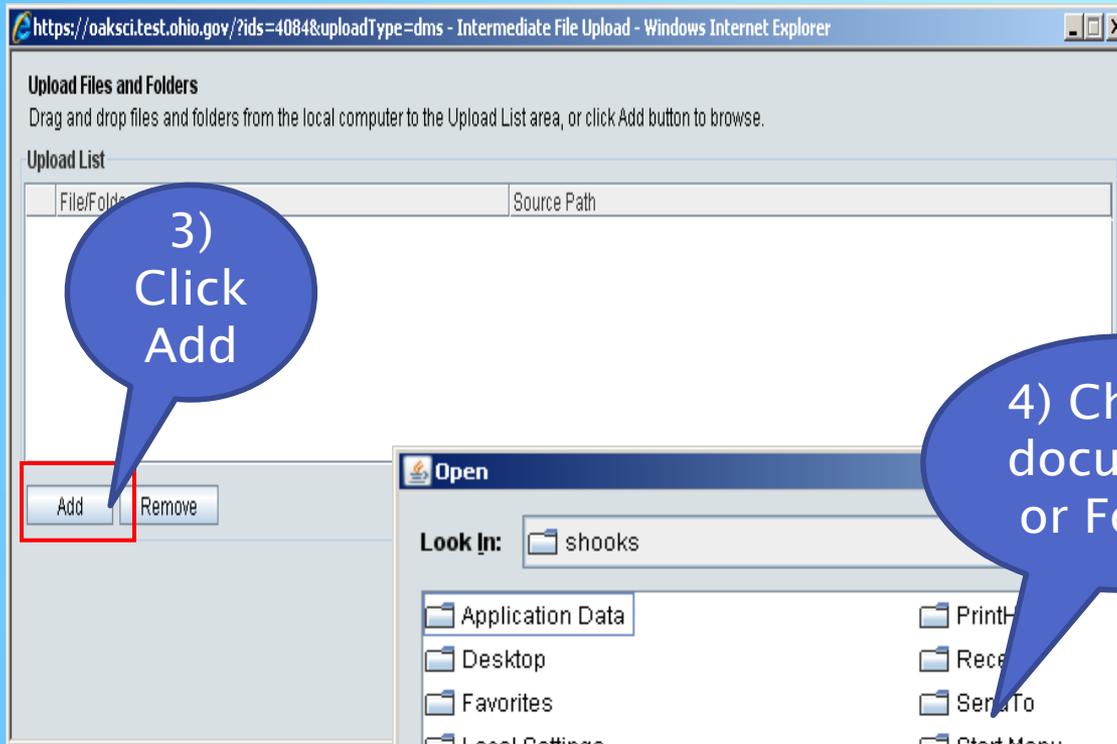
Upload Files and Folders
Drag and drop files and folders from the local computer to the Upload List area, or click Add button to browse.

Upload List

File/Folder	Source Path
-------------	-------------

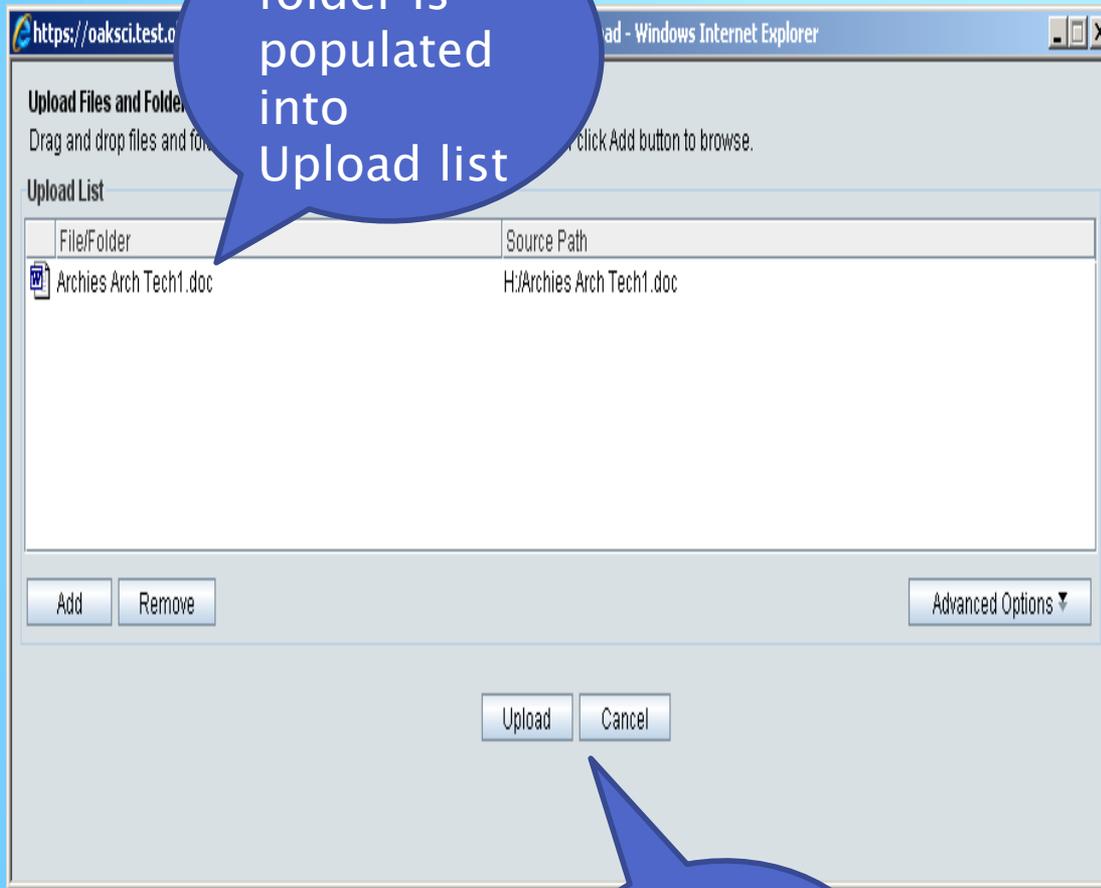
Buttons: Add Remove Advanced Options Upload Cancel

Upload



Upload

6) File or folder is populated into Upload list



7) Click Upload

Questions?

Please contact OAKS CI
Support Desk:

OAKSCI@OFCC.OHIO.GOV

or

614.644.2211