



K-12 Intro to OAKS CI

Job Aids

- ▶ For additional reference materials visit our website 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.

OAKS CI Training & Job Aids (K-12 Schools)

You are here: Resources > OAKS CI > K-12 Training

K-12 (All Users) K-12 (User-Specific) K-12 (District Staff Only)

K-12 (Workflow Process) K-12 (Projects Created after 08/01/2015)

The OAKS CI team is pleased to provide a growing bank of Job Aids and pre-recorded webinar sessions which can be viewed at any time. Registrations and passwords are not required. This list is updated as new information becomes available. For additional training information or questions, contact Katie Tuttle at katie.tuttle@ofcc.ohio.gov.

*Please review the Introduction to Project Shells training guide prior to viewing any recorded presentations.

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

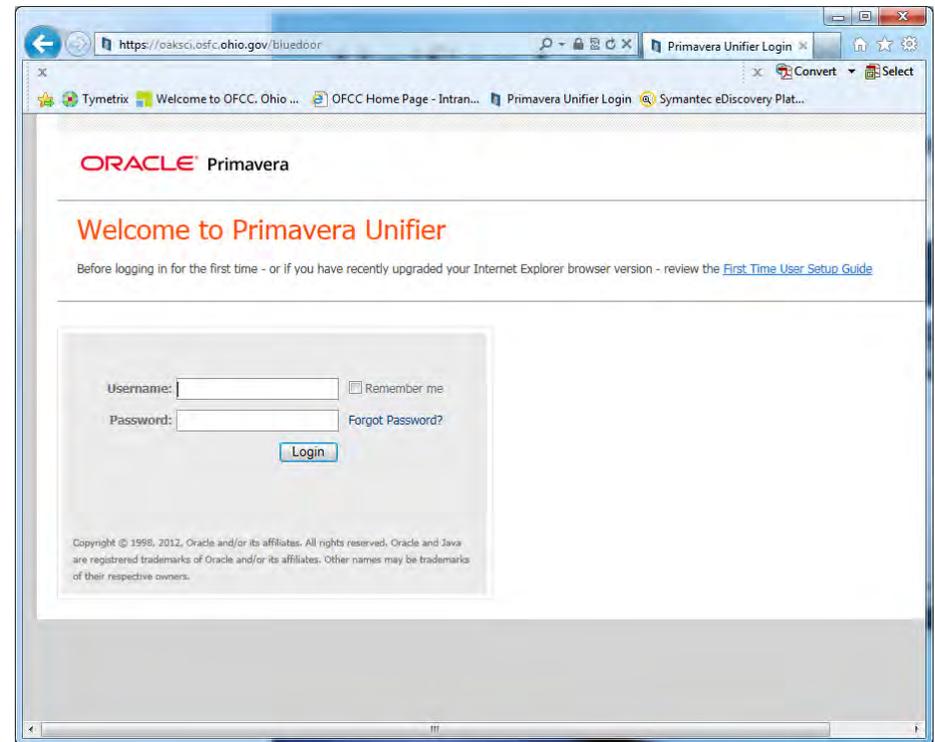
- ▶ Improved project communication and collaboration
- ▶ Reduced potential for litigation
- ▶ Housed in the Cloud so you can utilize any browsing tool to access
- ▶ Automates workflows
- ▶ Automation of contract management and change order processing

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 currently selected, as indicated by a red arrow and a callout box labeled 'Cross project tabs'. The interface features a 'User Mode' section on the left with a navigation tree containing Home, Tasks, Messages, Drafts, and uMail. The main content area is divided into several sections: 'Announcements' (with a red arrow pointing to it and a callout box labeled 'Announcements'), 'Items Requiring Your Attention' (listing 42 total tasks, 34 new, and 5 late; 0 new messages; 10 new draft records; and 3 new uMails), and 'Tasks or New uMails' (a table listing tasks across various projects). The table has columns for Number, Name, Tasks, uMails, and Company Name. The data is as follows:

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 from the 'Projects with Active Tasks' callout box to the table above.

District and Building Level Access

The screenshot shows the Primavera Unifier web interface. The user is logged in as Shauna Hooks. The 'School Facilities' project is selected. The 'View' menu is highlighted with a red arrow. A red box contains the text 'District and Building Level Project Access'. The interface displays a table of tasks and uMails for the selected project.

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

The screenshot shows the Oracle Primavera Unifier interface. The browser address bar indicates the URL is <https://oaksci.training.osfc.ohio.gov>. The user is Shauna Hooks, last login on 10/08/2013 at 09:21 AM. The application is in 'User Mode' and the current view is 'School Facilities - Home'. The 'View: District Project' dropdown is selected. Below this, a table displays 5 items. The table has columns for District Project Identifier, District, OAKS Code, Setup Date, and Status. A red box highlights the 'District Project' view, and another red box highlights the 'District' column with an arrow pointing to it.

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

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

Double Clicking the District will take you to the district homepage

Building Level Access

The screenshot shows the Primavera Unifier web interface. The browser address bar displays 'Unifier@https://oaksci.training.osfc.ohio.gov'. The user is identified as 'Shauna Hooks' with a last login of '10/08/2013 09:21 AM'. The 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. A 'View: Building Project' dropdown is visible above a table of building projects. The table contains the following data:

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

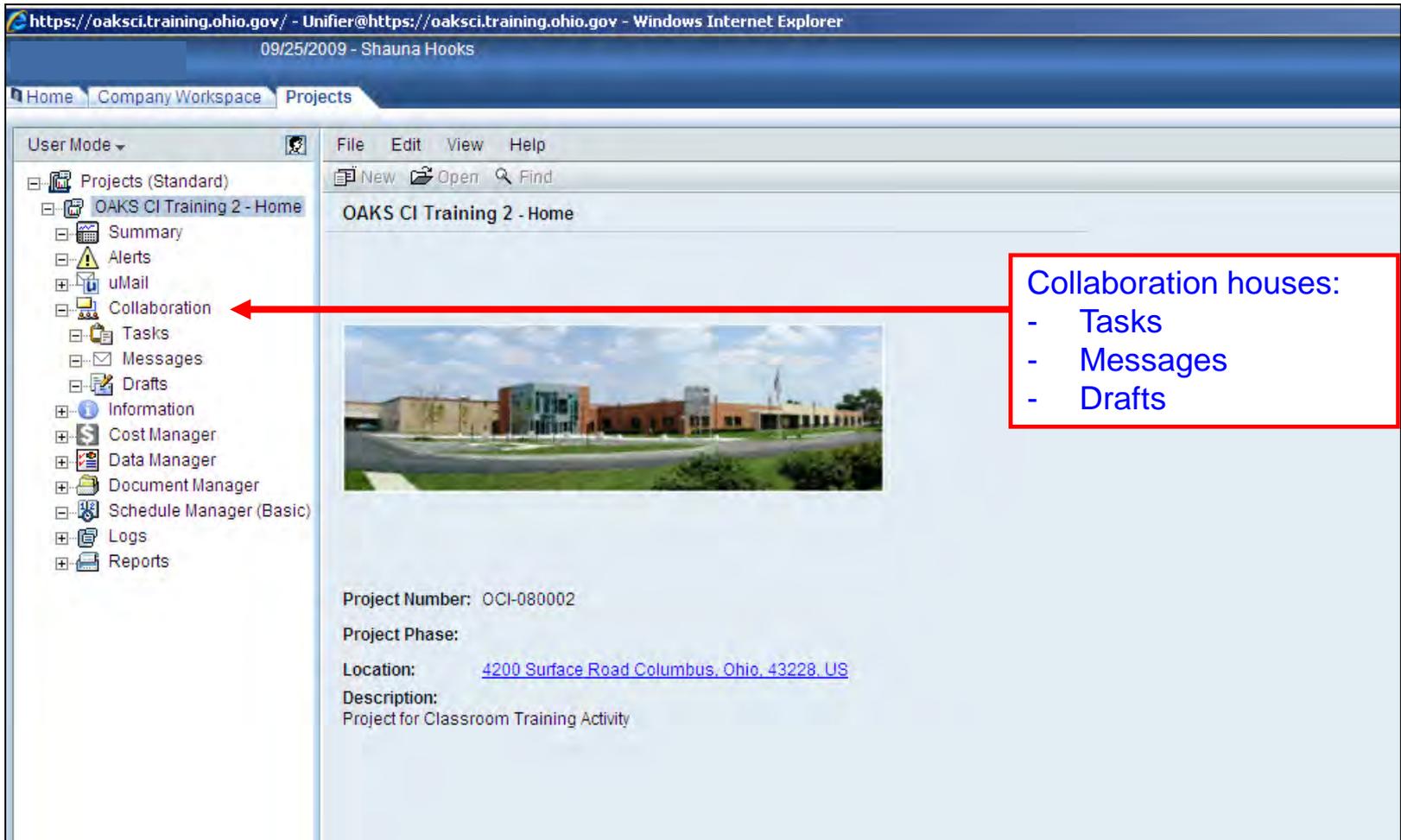
Details

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

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!



The screenshot shows a web browser window with the address bar displaying <https://oaksci.training.ohio.gov/> and the user Unifier@https://oaksci.training.ohio.gov. The page title is "OAKS CI Training 2 - Home" and the date is "09/25/2009 - Shauna Hooks". The navigation menu includes "Home", "Company Workspace", and "Projects". The left sidebar shows a tree view of the application structure, with "Collaboration" selected and highlighted by a red arrow. The main content area displays the project details for "OAKS CI Training 2 - Home", including a photograph of a building, the project number "OCI-080002", the project phase, the location "4200 Surface Road Columbus, Ohio, 43228, US", and the 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 in blue. A red arrow points from a text box below to this folder. The main content area shows a 'Tasks' window with a menu bar (File, Edit, View, Help) and a toolbar (New, Open, Find). Below the toolbar, it says 'Tasks - Current View: All' and '10 Item(s)'. A table lists 10 tasks with columns: Type, Number, Title, Record Due, From, Sent for, Task Due, and Received.

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Action Item	AI-00066	indigo	09/30/2009	Shauna Hook	Response		09/23/2009
Action Items	AI-00065	Visit	09/30/2009	Shauna Hook	Response		09/23/2009
Request for	RFI-00007	HVAC 1		Consultant St	Response Acc	09/07/2009*	08/31/2009
Action Item	AI-00054	dsds	09/07/2009*	Consultant St	Review		08/31/2009
Action Item	AI-00015	New Action	07/20/2009*	Shauna Hook	Response		07/13/2009
Change Orc	CO-0004	Bruce's and Rita's		Oaks Student	CM Review		07/09/2009
Action Items	AI-00012	Project One	06/19/2009*	Oaks Student	Response		06/12/2009
Contract Sc	C SOV-0004	General Prime - 1		Fred Holcom	Associate Apt		04/16/2009
Subcontract	SSD-0009	T P Mechanical C		Oaks Student	Associate Dec	04/19/2009*	04/16/2009
Subcontract	SSD-0008	PM		Oaks Student	Associate Dec	04/19/2009*	04/16/2009

Tasks: Any work that comes to you for approval or review

Messages

The screenshot shows a software application window titled 'Company Workspace' with a 'Projects' sub-tab. The 'Messages' folder is selected in the left-hand navigation pane. The main window displays a list of 12 messages. A red arrow points from a text box to the 'Messages' folder in the navigation pane.

Type	From	Subject	Received Date
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0001: Approved Componete &	09/14/2009
Action Items	Consultant Student5,s	AI-00039: George's Visit	08/13/2009
Subcontractor/Supplier Declaration	Steve Mayo,soo	SSD-0023: Waterspout 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

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

Drafts

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

Drafts - Current View: All
11 Item(s)

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

Drafts: Unfinished records you have created and saved

Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

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



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

A screenshot of the OAKS CI application interface. The "Save" button in the top toolbar is circled in red. The main content area shows a form for "Applications for Payment K12" with fields for Project Name, Project Number, Record Number, and Creator. Below this is the "Action Details" section with "Create New Applications for Payment K12" and "Task Notes" fields. At the bottom, there is a "Pay Request Details" 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 with a left sidebar and a main content area. The sidebar contains a tree view of navigation items, with 'Logs' circled in red. The main content area displays a table of Design Reviews (Records) with columns: Record No, Stage, Completion Status, Creation Date, Est. Construction Cost (\$), and Status. A red arrow points from a text box to the 'Logs' menu item.

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

File Edit View Actions Help Workflow Actions -Select-

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

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 *

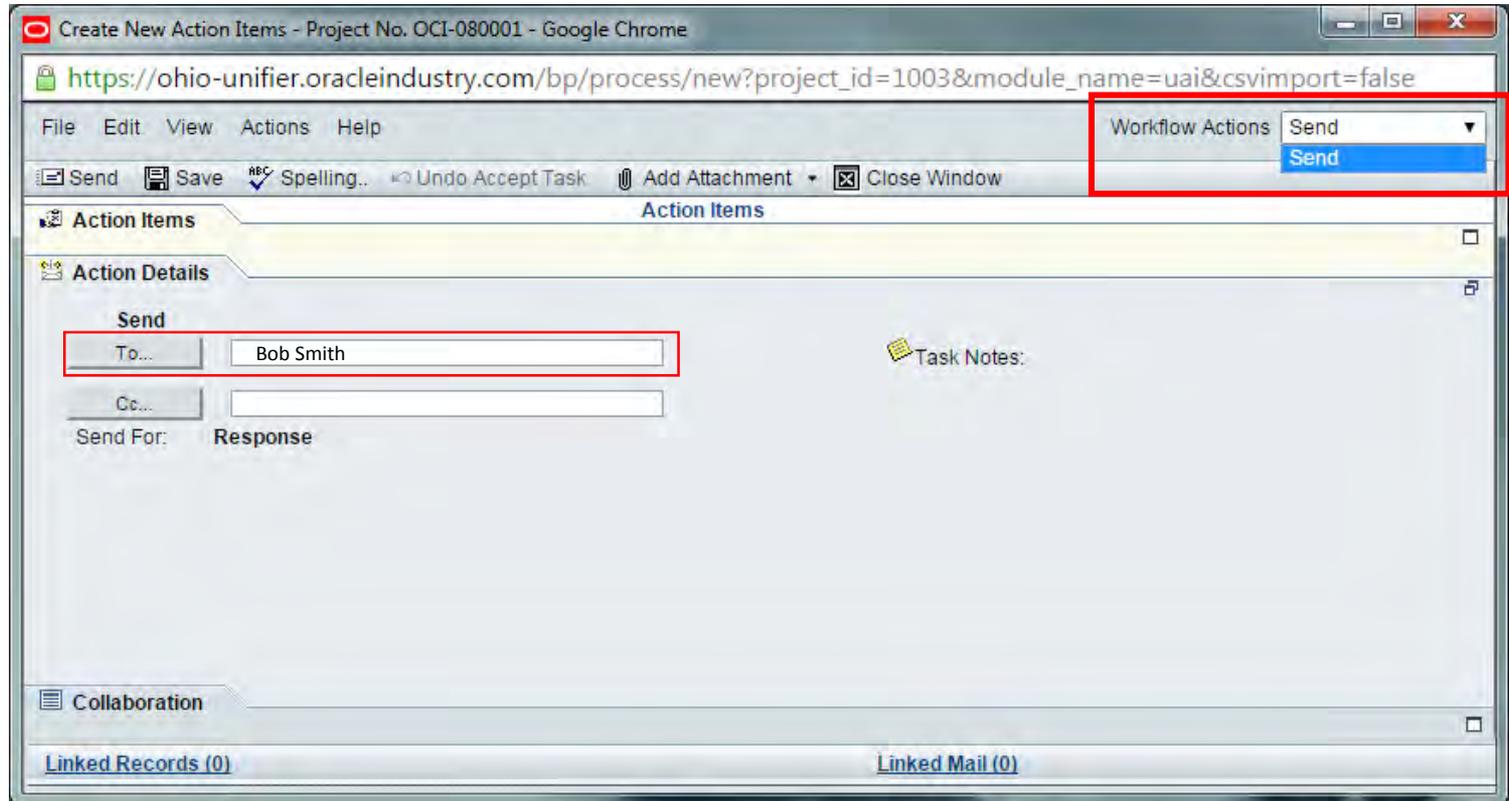
Action Details

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	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)

Design Reviews

Attachment Index : (3)

Display Attachments with Comments by: All

Page 1 of 1

Display 100 items per page

File Name	Type	Status
Design	Drawings	Submitted
Design	Shop Drawing	Submitted
Design	Informational	Accepted

Comments Download Find

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

2) Click Accept Task

Note: Click to add a temporary note that will go only to the next person in the workflow

Responding to a Task

1) Select Appropriate Workflow Action

Note: Click to add a general comment that will be permanent to the record

Workflow Actions

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:

Design Reviews

Attachment Index : (3)

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

General Comments

Responding to a Task

The screenshot shows a web browser window with the URL https://oaksci.training.ohio.gov/?srcid=26&model=udr&fromcostlog=1&project_id=1009. The page title is "Design Rev - Windows Internet Explorer". The browser menu bar includes File, Edit, View, Actions, and Help. The "Workflow Actions" dropdown menu is open, showing "Send For Detailed Review". The "Send" button in the menu is circled in red. Below the menu, the "Action Details" tab is active, displaying the "Send For Detailed Review" action. The "To..." field contains "Becky Bessell, Consultant Student1, Consulta" and the "Task Due" is "12/19/2009". The "Cc..." field is empty. The "Send For:" field contains "Detailed Review".

3) Click Send

2) Click the "To" box and choose the next person to get the task

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

What if I want to know the status of my Record?



Finding the Record Status

The screenshot displays a software application window with a navigation pane on the left and a main data view on the right. The navigation pane contains a tree view of folders and items, with 'Logs' and 'Professional Services Pay Request' circled in red. The main view shows a table titled 'Professional Services Pay Request - Current View: All' with 2 items. A red arrow points to the 'Status' column of the table.

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 displaying a 'Professional Services Pay Request' form. The form is divided into several sections: General, Task Details, and Pay Request Details.

General Section:

- 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: (empty)

Task Details Section:

- From: Shauna Hooks;
- To: Owner Financial:Becky Bessell; More
- Cc: (empty)
- Sent For: Payment Process
- Task Due Date: (empty)
- Task Status: **Not Started** (circled in red)
- Task Notes (0)

Pay Request Details Section:

- Show Currency in: Transaction Currency
- 1 Item(s) 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

- Total Amount: \$ 7,500.00

Footer:

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

Finding the Record Status

https://oaksci.training.ohio.gov/?processId=2010&selected_node_id=1544 - BP Progress - Windows Internet Explorer

Workflow Progress

Title: Garys Arch. PR#1 Current Step: [Payment Process](#)

Record No: PSPR--0002 BP Setup used: Professional Services Pay Request

Due Date:

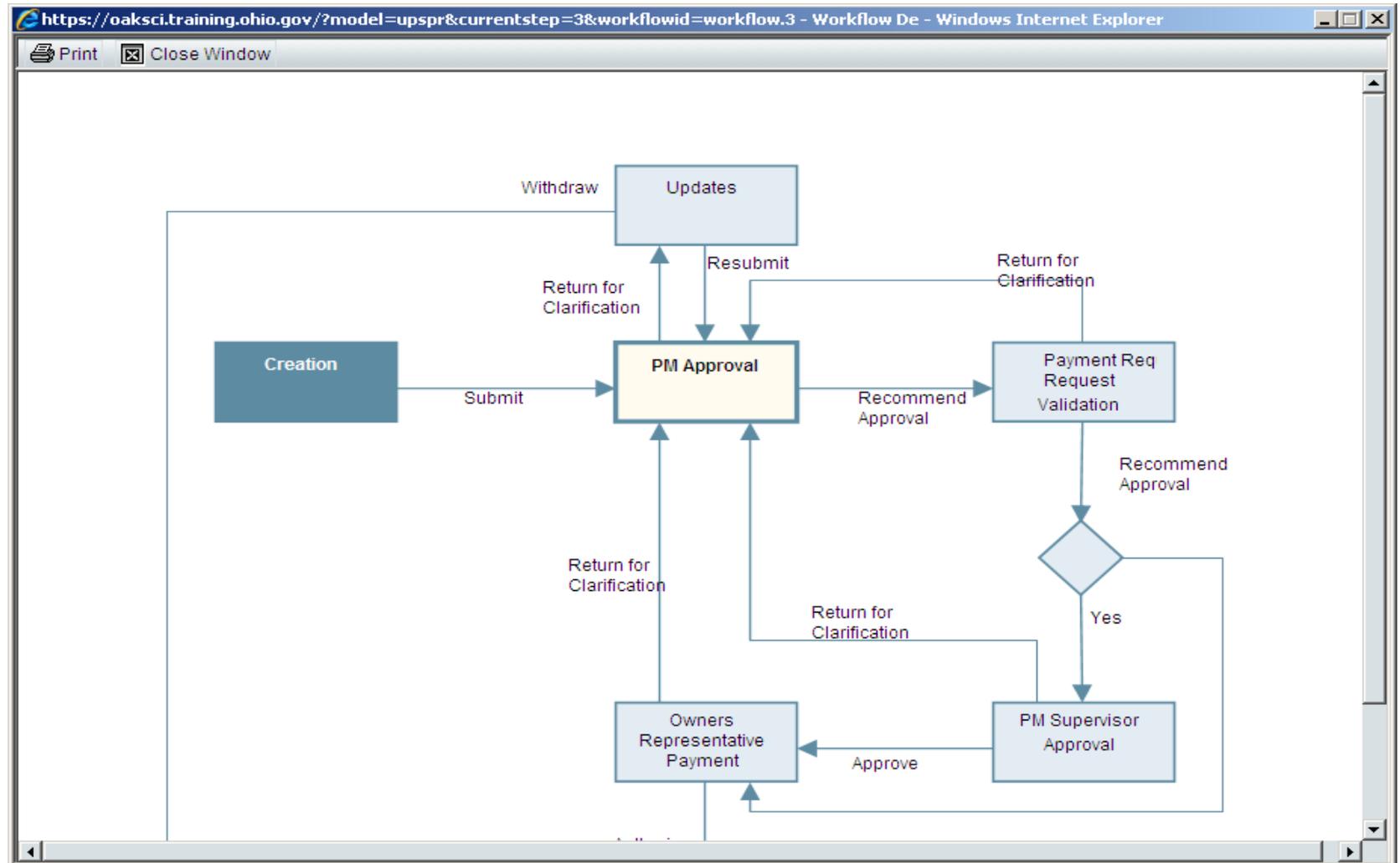
Step Name	Completion Rule	Status
Creation	Any User	Completed
PM Approval	Any User	Completed
Updates	Any User	Not Started
PM Supervisor Approval	Any User	Not Started
Owners Representative Payment Authorizal	Any User	Completed
Payment Request Validation	Any User	Completed
Payment Process	Any User	Not Started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

Tasks for the selected step:

Assignee	Company	Status	Action	Due Date	Completion Date
Shauna Hooks	soo	Completed	Recommend Approv:		12/09/2009 11:38 AM I
Shauna Hooks	soo	Closed	Return for Clarificatio		12/09/2009 11:37 AM I

Graphic View of Workflow

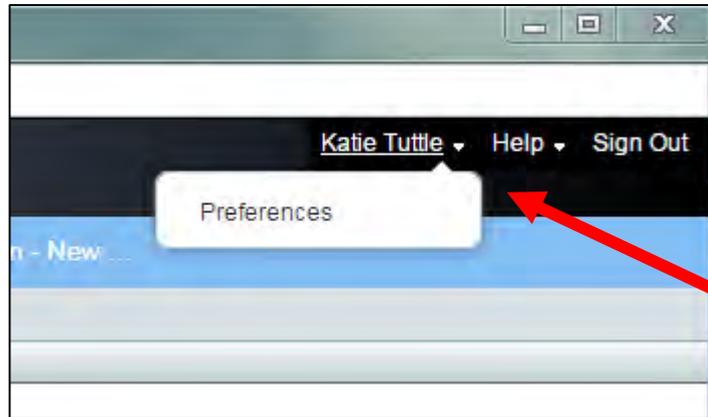


Document Manager

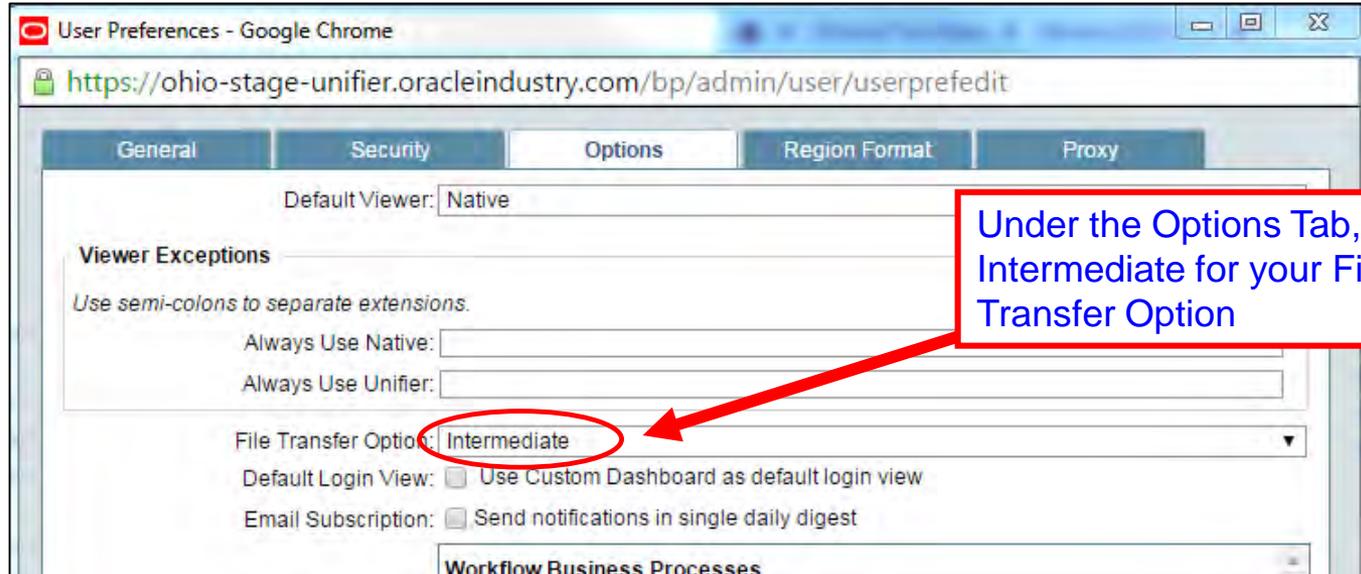
About Document Manager

- ▶ 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

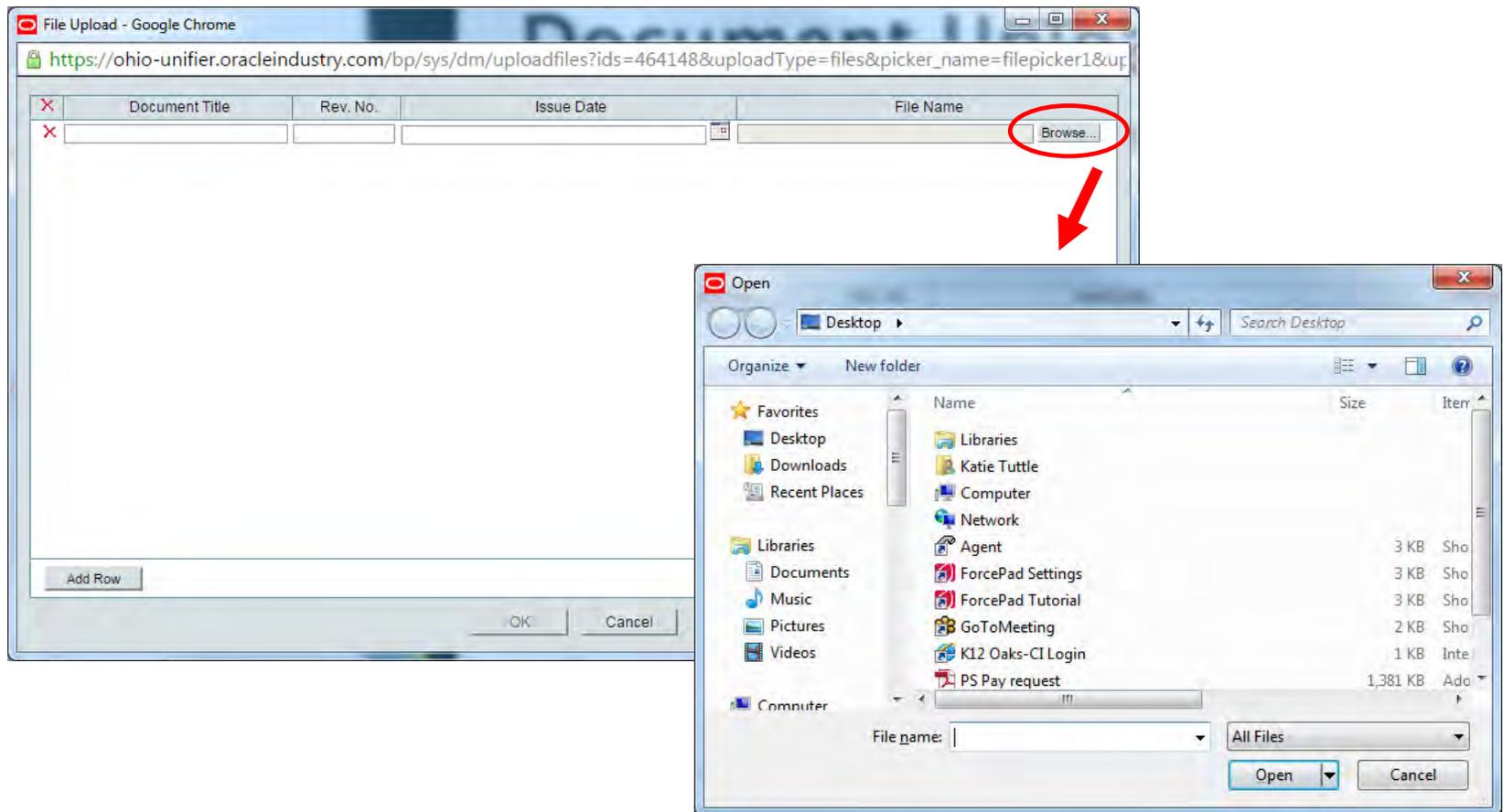
Document Upload

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" folder is selected in the left sidebar, and the "Upload" button in the toolbar is circled in red. A red arrow points from the "Upload" button to a red box containing the text "Click Upload". Another red arrow points from the "Documents" folder in the sidebar to a red box containing the text "Choose folder". The main content area displays a list of 17 items, including folders for various project phases and two PDF files.

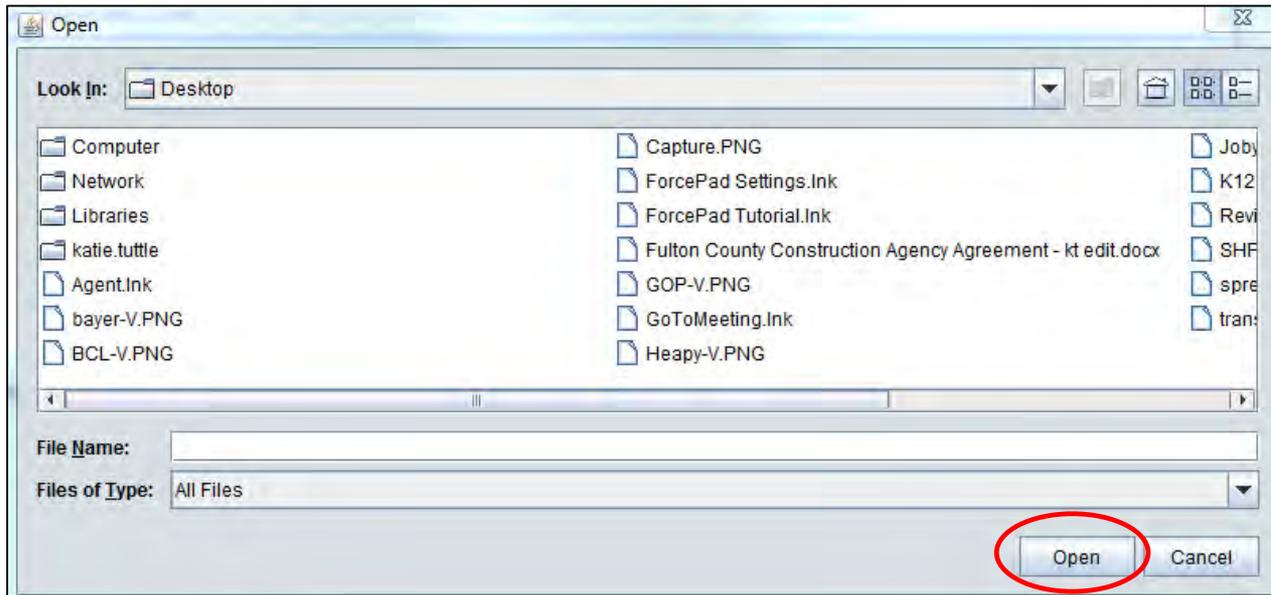
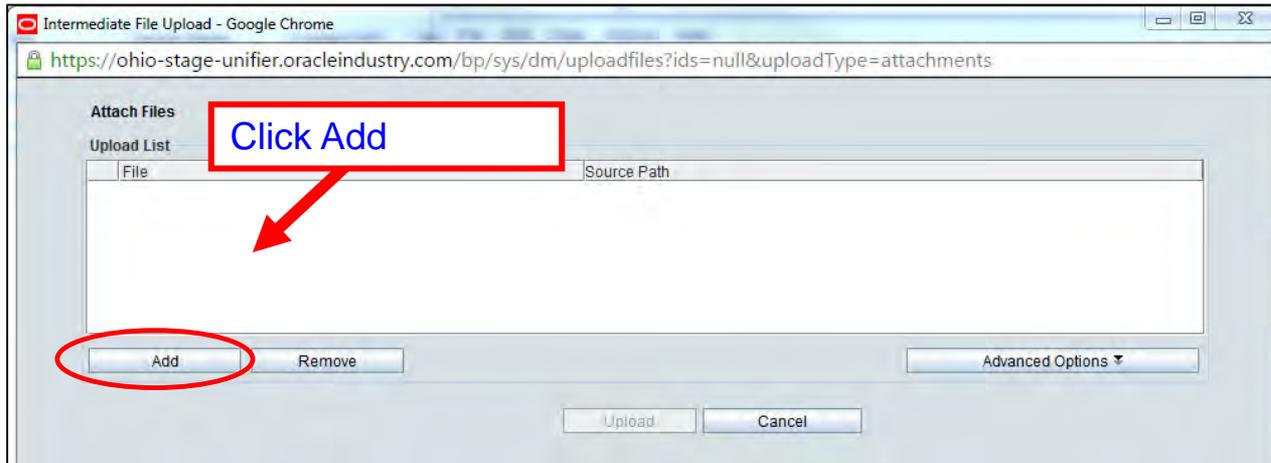
Ref.	BP	Name	Size	Upload Date	Owner	Title	Rev.No.
		0000 Concept Development			Steve Mayo		
		0100 Acquisition			Steve Mayo		
		0200 Design			Steve Mayo		
		0250 Bid & Award			Steve Mayo		
		0300 Construction			Steve Mayo		
		0310 Contracts			Steve Mayo		
		0320 Schedule			Steve Mayo		
		0330 Contractor 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" record. 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

614.644.2211