

OAKS CI

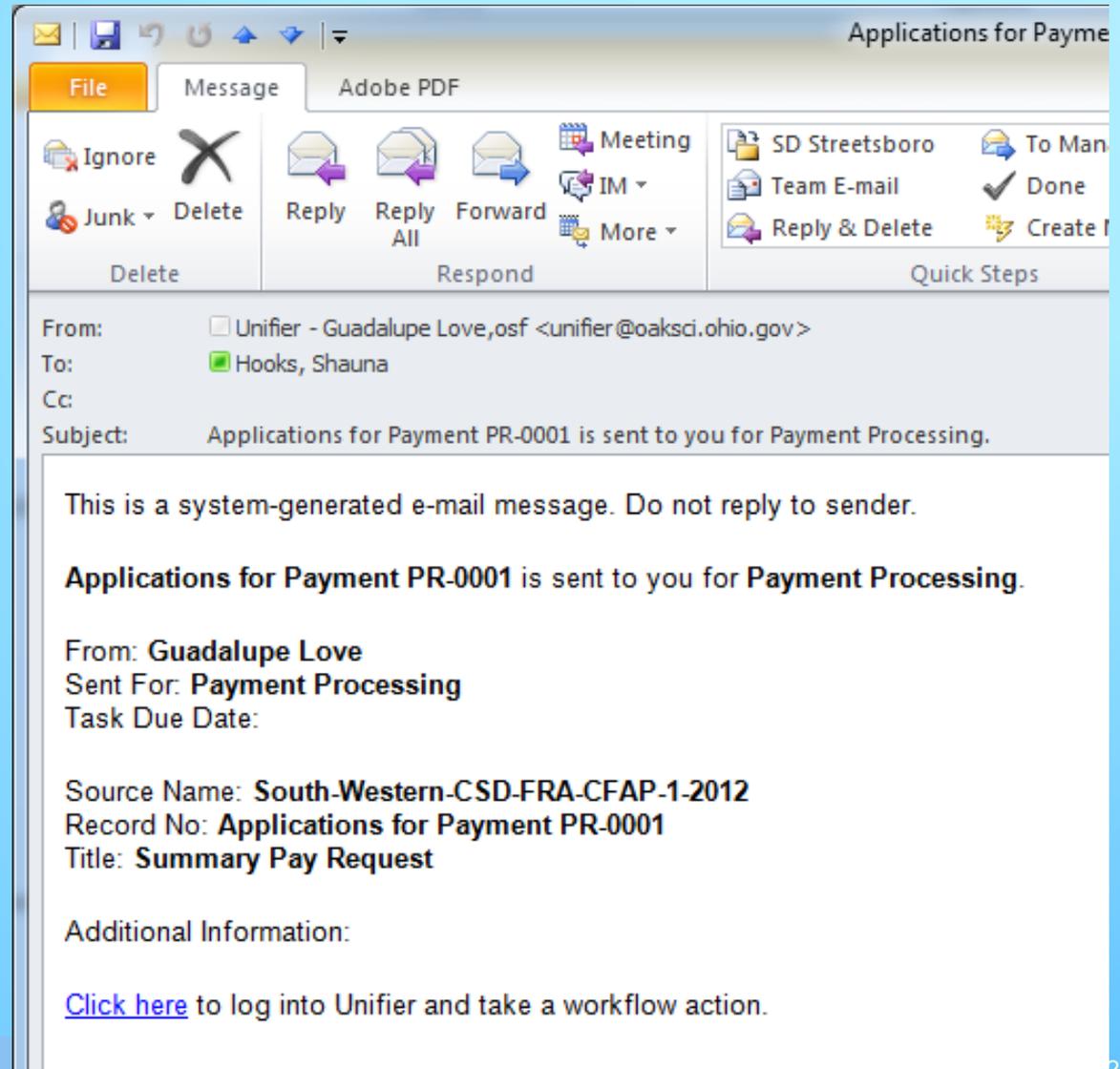
Capital Improvements (Management System)

What to do when you receive a new Task in
OAKS CI

Receive Notification

- ▶ You will receive an email from Unifier indicating that you have a Task Pending

This notification will tell you the record type, why you are receiving it and the district and/or building that the Task is housed

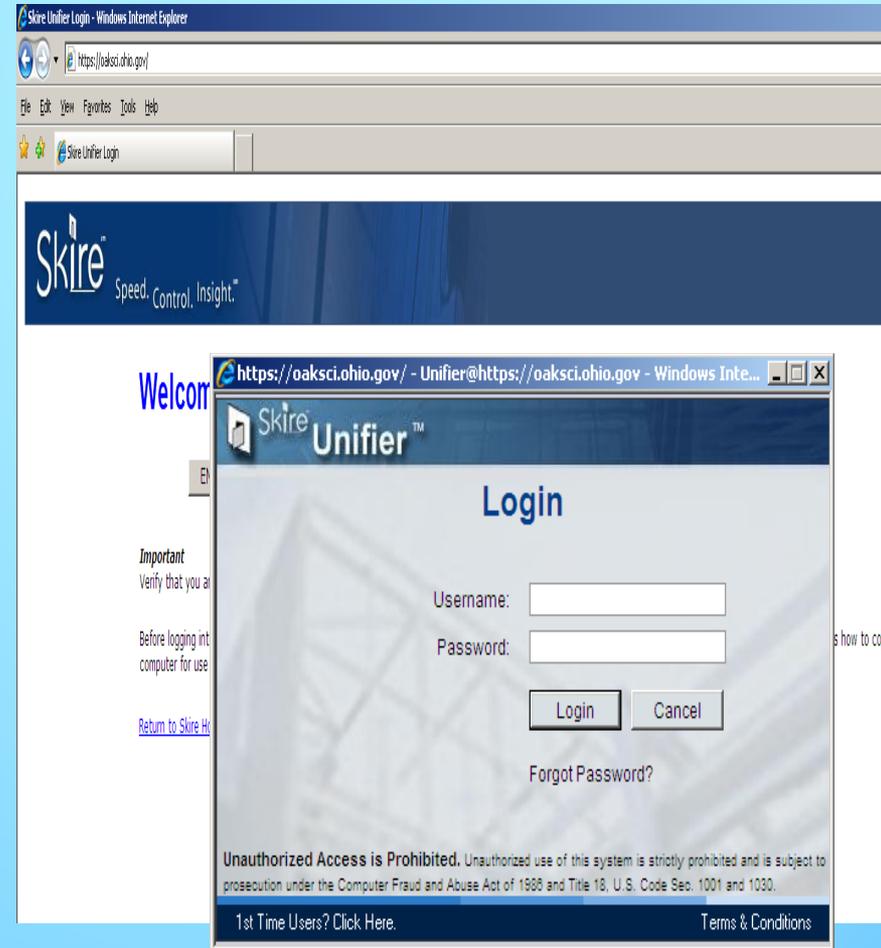


Log into OAKS CI

- ▶ 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 application interface. The browser title is "Unifier@https://oaksci.training.osfc.ohio.gov - Windows Internet Explorer". The user is logged in as Shauna Hooks (Last login: 09/25/2013 02:02 PM). The navigation menu includes Home, Company Workspace, Projects, and School Facilities. The main content area is divided into several sections:

- Announcements:** A section for displaying announcements.
- Items Requiring Your Attention:** A summary of tasks, messages, draft records, and uMails.
 - [Tasks: 42 Total, 34 New, 5 Late](#)
 - [Messages: 0 New](#)
 - [Draft Records: 10 New](#)
 - [uMails: 3 New](#)
- Tasks or New uMails:** A table listing tasks and their associated 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 "2 Late" status in the first row of the table.

Double click on the District or Building with the Active Task

Building / Project Home Page

The screenshot shows the Primavera Unifier web application interface. The browser address bar displays "Unifier@https://oaksci.osfc.ohio.gov - Windows Internet Explorer". The user is logged in as Shauna Hooks on behalf of Charonda Caldwell. The interface includes a navigation menu on the left with the following items: Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. The main content area is titled "Covington EVSD-EVSD-MIA-CFAP-1-2013 - Home" and features a "Summary" tab. A section titled "Items Requiring Your Attention" contains links for "Tasks: 1, New 1, Late 0", "Messages: 0 New", "Draft Records: 0 New", and "uMails: 0 New". A table at the bottom displays the "Building Project - Current View: All" with the following data:

Number	Name	Setup Date	Setup Template	Status
SFC-140359.01	New Elementary Middle PK-8 (Covington)	01/14/2014	OSFC Building Project GC Template	Active

You can grab your Task from the Task link (right) or within Collaboration (left)

Building / Project Home Page

The screenshot shows the Primavera Unifier web interface. The browser address bar displays 'Unifier@https://oaksci.osfc.ohio.gov - Windows Internet Explorer'. The user is identified as 'Shauna Hooks on behalf of Charonda Caldwell (Last login: 05/08/2014 03:53 PM)'. The navigation tabs include 'Home', 'Company Workspace', and 'School Facilities'. The left sidebar shows a tree view with 'Tasks' selected. The main content area displays a table of tasks.

Type	Number	Title	Record Due	From	Sent for
Applications	PR-0003	FHAI 04/30/2014 IN		Pamela Wehrk	Review and V

Double click on Task to Open

Accepting a Task

You must Accept the Task to take any action

Note: If you see a note in the Task Note area, you must review the note by clicking on it, prior to accepting the Task, this note is a temporary note and will not be permanent to the record

No.	WBS Code	Commit Short Description
002	AE-BS-DD	Design Development S
001	AE-BS-DD	Design Development S

Find Total Amount: \$ 58,283.10

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

Reviewing a Task

Applications for Payment - FHA1 04/30/2014 INVOICE - Project No. SFC-140359 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Applications for Payment

Validate the pay request including retainage, applying liens and liquidated damages, escrowed funds, vendor insurance, required receipts and documentation. You may attach missing backup provided by the vendor without returning the pay request.

General

Project Name: Covington EVSD-EVSP... Record Number: [redacted]

Project Number: SFC-140359

Organization Name: Covington Ex Village S...

Action Details

(Click here to view latest content)

To... [input field]

Cc... [input field]

Send For:

Pay Request Details

Current View: All

2 Item(s)

No.	WBS Code	Commit Short Description	Schedule Value	Earned	Period	Complete	Complete	Complete	Reimb(s)	Stored
002	AE-BS-DD	Design Development Stage	9,625.00	3,850.00	1,925.00	0.00	0.00	60.00	0.00	0.00
001	AE-BS-DD	Design Development Stage - 25	281,790.50	112,716.20	56,358.10	0.00	0.00	60.00	0.00	0.00

Add Copy Import Remove Find

Total Amount: \$ 58,283.10

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

Note the instructions at the top of the record

If you view a talking head next the General Comments Link, click Link to view comments, these comments are permanent to the record

Reviewing a Task

Applications for Payment - FHAI 04/30/2014 INVOICE - Project No. SFC-140359 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

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

General Applications for Payment

Validate the pay request including retainage and documentation. You may attach missing documents and

General

Project Name: Covington Ex Village SD
Project Number: SFC-140359
Organization Name: Covington Ex Village SD
Facility Name: New Elementary/Middle PK-8
Title: FHAI 04/30/2014 INVOICE
Contract Reference: [Covington EVSD SOV AE](#)
Final Payment?: No
Retainage Release Requested?: -Select-
Period From: 04/01/2014
Internal Ref. Number: 213084.00 INV 1010740

Creation Date: 05/09/2014 10:22 AM Local (GMT-5)
Status: Pending
Request Date:

Contractor Address
Vendor: Select... *
Address Line 1:
Address Line 2:
City:
State:

Action Details
Pay Request Details

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

By clicking the Tab you will open up the portion the record, notice I have click the General Tab, Now the upper portion of the is viewable

Complete all portions of the form available and follow Instructions for additional information

Add General Comments

Applications for Payment - FHAI 04/30/2014 INVOICE - Project No. SFC-140359 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select

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

Applications for Payment

General

Validate the pay request including retainage, applying liens and liquidated damages, escrowed funds, vendor insurance, required receipts and documentation. You may attach missing backup provided by the vendor without returning the pay request.

General

Project Name:	Covington EVSD-EVSD-MIA-CFAP-1-2	Record Number:	PR-0003
Project Number:	SFC-140359	Creator:	Pamela Wehrkamp
Organization Name:	Covington Ex Village SD	Creation Date:	05/09/2014 10:22 AM Local (GMT-5)
Facility Name:	New Elementary/Middle PK-8	Status:	Pending
Title:	FHAI 04/30/2014 INVOICE	Request Date:	
Contract Reference:	Covington EVSD SOV AE	Vendor Name:	Fanning/Howey Associates, INC.
Final Payment?:	No	EDGE Certified Prime?:	No
Retainage Release Requested?:	-Select-		
Period From:	04/01/2014	Period To:	04/30/2014
Internal Ref. Number:	213084.00 INV 1010740	AE Approval Date:	

Contractor Address

Vendor: Select... *

Address Line 1:

Address Line 2:

City:

State:

Action Details

Pay Request Details

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

General Comments - Windows Internet Explorer

Close Window

Draft Comments

Text Comments	Attachments	Hidden Comment
add	(0)	No

Comments

View Comments: All (0) Hidden (0) View Comments By: All

Date	Name	Company	Hidden Comment
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To add General Comments , click the General Comments Link, once the secondary screen appears , click the Add button and add your comments, click Close Window when complete

Move Record/Task

The screenshot shows a web browser window titled "Applications for Payment - FHA1 04/30/2014 INVOICE - Project No. SFC-140359 - Windows Internet Explorer". The browser's address bar and menu bar are visible. The main content area is titled "Applications for Payment" and contains a "General" tab. A "Workflow Actions" dropdown menu is open, showing options: "-Select-", "Validated", and "Return for Clarification". A red arrow points from the text box below to the "Validated" option. The text box contains the instruction: "Once record is complete, choose a Workflow Action". Below the text box, there are several input fields for project details.

File Edit View Actions Help

Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Applications for Payment

Validate the pay request including retainage, applying liens and liquidated damages, escrowed funds, vendor insurance, required receipts and documentation. You may attach missing backup provided by the vendor without returning the pay request.

General

Project Name: Covington EVSD-EVSD-MIA-CFAP-1-2 Record Number: PR-0003

Project Number: S

Organization Name: Covington Ex Village SD Creation Date: 05/09/2014 10:22 AM Local (GMT-5)

Facility Name: New Elementary/Middle PK-8 Status: Pending

Title: FHA1 04/30/2014 INVOICE Request Date:

Once record is complete, choose a Workflow Action

Move Record/Task

Applications for Payment - FHA1 04/30/2014 INVOICE - Project No. SFC-140359 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Validated

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Applications for Payment

Validate the pay request including retainage, applying liens and liquidated damages, escrowed funds, vendor insurance, required receipts and documentation. You may attach missing backup provided by the vendor without returning the pay request.

General

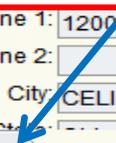
Project Name:	Covington EVSD-EVSD-MIA-CFAP-1-20	Record Number:	PR-0003
Project Number:	SFC-140359	Creator:	Pamela Wehrkamp
Organization Name:	Covington Ex Village SD	Creation Date:	05/09/2014 10:22 AM Local (GMT-5)
Facility Name:	New Elementary/Middle PK-8	Status:	Pending
Title:	FHA1 04/30/2014 INVOICE	Request Date:	
Contract Reference:	Covington EVSD SOV AE	Vendor Name:	Fanning/Howey Associates, INC.
Final Payment?:	No	EDGE Certified Prime?:	No

Address Line 1: 1200 IRMSCHER BOULEVARD
Address Line 2:
City: CELINA

Action Details
Pay Request Details

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

Click the Action Details tab to view the next person in the workflow



Move Record/Task

Applications for Payment - FHAI 04/30/2014 INVOICE - Project No. SFC-140359 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Validated

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Applications for Payment

Action Details

Validated [\(Click here to view latest content\)](#)

To... Stacey Thomas, Project Manager

Cc...

Send For: PM Review

Task Notes:

Pay Request Details

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

The record can now be moved forward by clicking the send button

To add a Task Note, click the note pad, this note will be temporary and only viewable by the next person in the workflow

QUESTIONS?

- ▶ Call or Email OAKS CI
- ▶ 614.644.2211
- ▶ OAKSCI@OFCC.OHIO.GOV

