

OAKS CI

Capital Improvements (Management System)

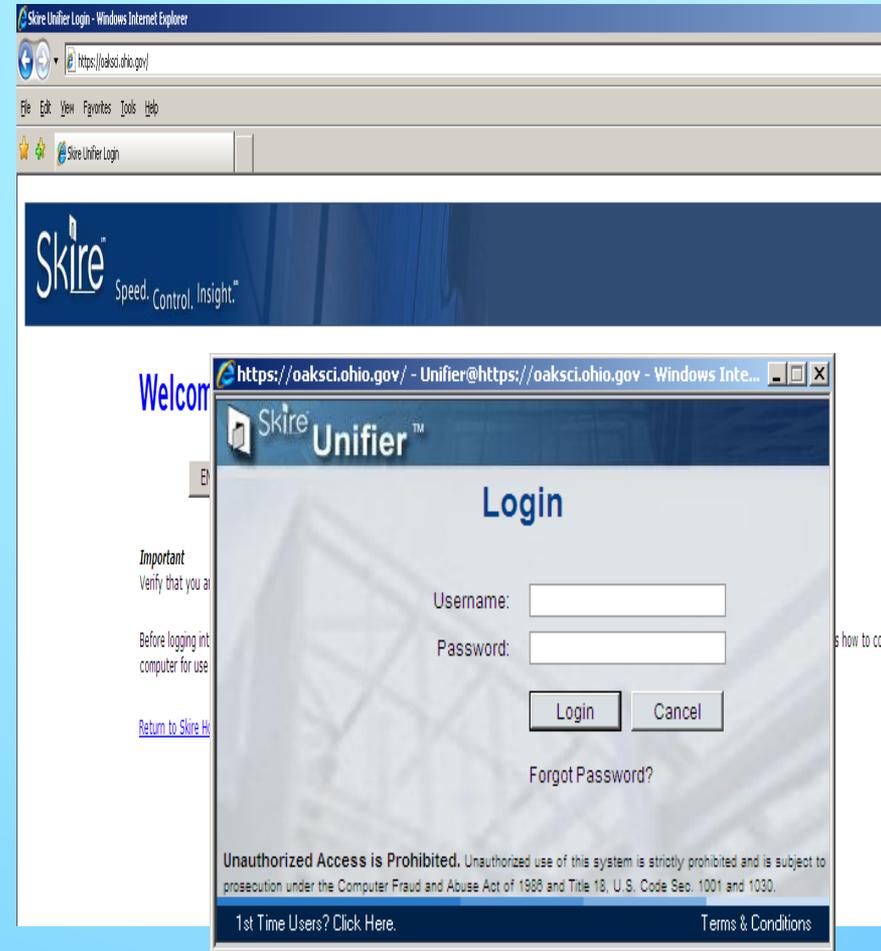
Getting into your Project –Creating a
Submittals Log (CMR–DB)

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 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 interface includes navigation tabs for Home, Company Workspace, Projects, and School Facilities. A left sidebar shows a 'User Mode' section with icons for Home, Tasks, Messages, Drafts, and uMail. A red arrow points from a red-bordered box labeled 'Cross project tabs' to the 'Projects' tab. The main content area features an 'Announcements' section, with a red arrow pointing from a red-bordered box labeled 'Announcements' to it. Below this is a table titled 'Tasks or New uMails:'. A red arrow points from a red-bordered box labeled 'Projects/Buildings with Active Tasks' to the 'Tasks' column of this table.

Cross project tabs

Announcements

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

Projects/Buildings with Active Tasks

District and Building Level Access

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar indicates the user is logged in as Shauna Hooks. The navigation menu includes Home, Company Workspace, Projects, and School Facilities. A red arrow points to the 'School Facilities' tab. A red-bordered box highlights the text 'District and Building Level Project Access'. Below this, a table lists tasks and uMails for various projects.

District and Building Level Project Access

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

District Project - Current View: All

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

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

Building Access

Unifier@https://oaksci.training.osfc.ohio.gov - Windows Internet Explorer
ORACLE Primavera Unifier Shauna Hooks (Last login: 10/08/2013 09:21 AM) Community Bookmarks Preferences Support Logout

Home Company Workspace Projects School Facilities

User Mode ▾ File Edit View Help

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

View: Building Project ▾

Building Project - Current View: All

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

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

Building Project View will allow you building Level Access

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

Building/Project Home Page

The screenshot displays a software interface with a navigation menu on the left and a main content area. The main content area is titled 'Central Elementary - Home' and includes a 'Summary' section, a 'Details' section, and a section for 'Items Requiring Your Attention'. A red box highlights the 'Summary' section with the text 'Building/Project Specific Home Page'.

Navigation Menu:

- Central Elementary - Home
- Alerts
- uMail
- Collaboration
- Information
- Data Manager
- Document Manager
- Logs
- Reports

Summary Section:

Image

Items Requiring Your Attention

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

Details Section:

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

Links Section:

- [Ohio Facilities Construction Commission](#)
- [Ohio School Facilities Commission](#)

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

User Mode ▾

Central Elementary - Home

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

Central Elementary - Home View Dashboard My Dashboard

Summary

Image

Items Requiring Your Attention

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

Details

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

Links

- Ohio Facilities Construction C
- Ohio School Facilities Comm

Most work is completed in 3 Areas

Collaboration—Your Work

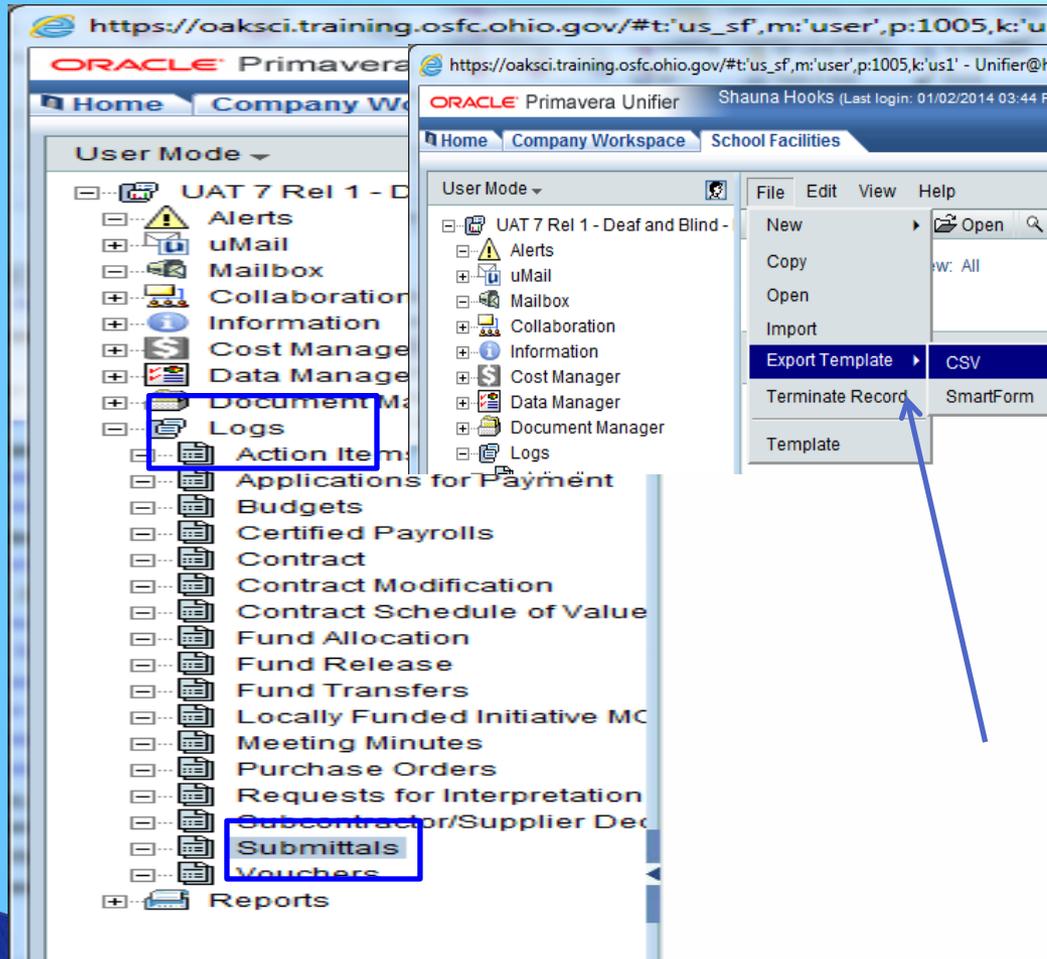
Document Manager—Your supporting documentation

Logs— Where records are housed and created

Create a Submittals Log

- ▶ The Submittals Log workflow allows the CMR or DB to import submittal information, utilizing a spreadsheet, directly into OAKS CI. These submittal request's can then be distributed to specific subcontractors for review and response.

Create a Submittal Log Record



Log into your project

Navigate to :

Logs >
Submittals

- Click File
- Choose Export Template CSV

Create a Submittal Record

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Import Business Process Records														
Note: Do not change column structure														
H	Title	Contract Name	Specification Line Item	Specification Type	Drawing Variation	Responsibility Description	Type	Due From Sent Date	Due From Received	Material Status	Delivery Date	Fabrication Lead Time	Approval	Notes
D	Location	Name	Line Item	Type	Variation	Description	How	Was	Sent Date	Received	Status	Date	Notes	

This spreadsheet can be populated from your own submittal log system.

Notes: Column A should be populated with the letter H. Column C must be populated with your Contract Title exactly the way it appears in OAKS CI. Each date entered must have an ' ', and have the following format ,ex. 'mm/dd/yyyy. Ensure you have 2digits for month, two digits for day and 4 digits for year. Each line added will create a separate submittal record .

For assistance contact OAKS CI at oaksci@ofcc.ohio.gov or 614.644.2211

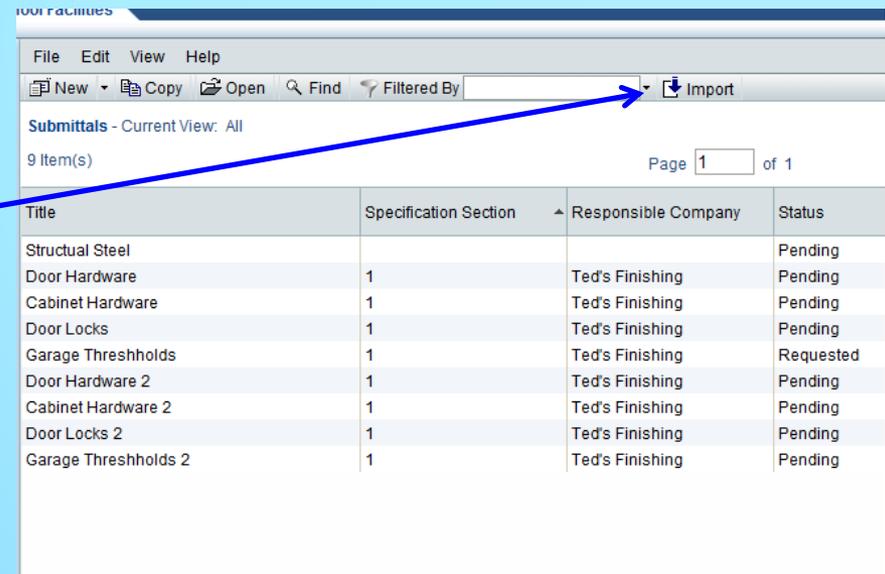
Create a Submittal Record

F15												
A	B	C	D	E	F	G	H	I	J	K	L	M
Import Business Process Records												
Note: Do not change column structure												
H	Title	Contract Name	Specification Section	Specification Paragraph	Drawing No.	Responsible Company	Type	Due From Sub	Due From Contractor	Material Required on Job Date	Delivery Lead Time	Fab Lead Time
D	Location	Name	Line Item Status	Type	Variation from Contract	Description of Variation	How Was It Sent?	Sent Date	Received Date	Status Date	Notes	
H	Door Hardware 2	CMR Agreement	1	2	1234	Ted's Finishing	Product Data	1/27/2014	2/3/2014	2/24/2014	2	0
H	Cabinet Hardware 2	CMR Agreement	1	3	1236	Ted's Finishing	Product Data	1/27/2014	2/3/2014	2/24/2014	2	0
H	Door Locks 2	CMR Agreement	1	5	1234	Ted's Finishing	Product Data	1/27/2014	2/3/2014	2/24/2014	2	0
H	Garage Thresholds 2	CMR Agreement	1	8	1277	Ted's Finishing	Product Data	1/27/2014	2/3/2014	2/24/2014	2	0

Once complete, save the spreadsheet to your computer

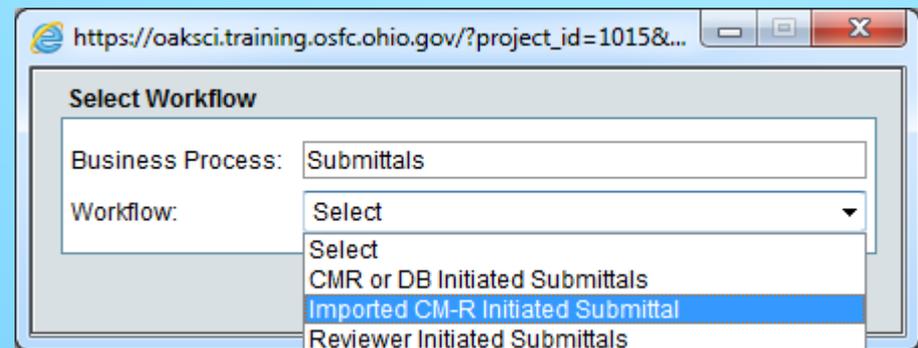
Create a Submittal Record

- ▶ In your Project
- ▶ Click Import
- ▶ Choose the Imported CM-R Initiated Submittal workflow, then click OK.



Submittals - Current View: All
9 Item(s) Page 1 of 1

Title	Specification Section	Responsible Company	Status
Structural Steel			Pending
Door Hardware	1	Ted's Finishing	Pending
Cabinet Hardware	1	Ted's Finishing	Pending
Door Locks	1	Ted's Finishing	Pending
Garage Thresholds	1	Ted's Finishing	Requested
Door Hardware 2	1	Ted's Finishing	Pending
Cabinet Hardware 2	1	Ted's Finishing	Pending
Door Locks 2	1	Ted's Finishing	Pending
Garage Thresholds 2	1	Ted's Finishing	Pending



https://oaksci.training.osfc.ohio.gov/?project_id=1015&...

Select Workflow

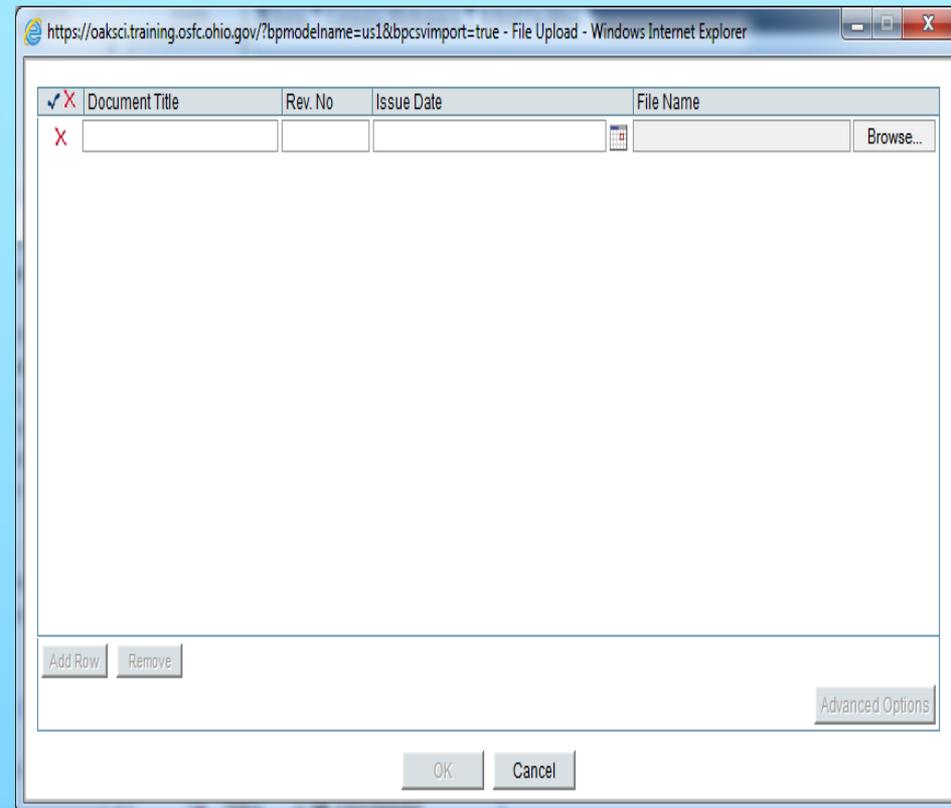
Business Process: Submittals

Workflow: Select

- Select
- CMR or DB Initiated Submittals
- Imported CM-R Initiated Submittal**
- Reviewer Initiated Submittals

Create a Submittal Record

- ▶ Click Browse
- ▶ You will now view your files, double click on the spreadsheet that you recently saved
- ▶ Click OK.
- ▶ If successful a message will appear indicating that the system is processing the request and will email you once complete (should take no longer than a minute or two)



The screenshot shows a web browser window titled "File Upload - Windows Internet Explorer" with the URL "https://oaksci.training.osfc.ohio.gov/?bpmodelname=us1&bpcsvimport=true". The main content area contains a table with the following structure:

✓ X	Document Title	Rev. No	Issue Date	File Name	
X	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Browse...

Below the table, there are two buttons: "Add Row" and "Remove". At the bottom right of the form area, there is a link for "Advanced Options". At the very bottom of the browser window, there are "OK" and "Cancel" buttons.

Create a Submittal Record

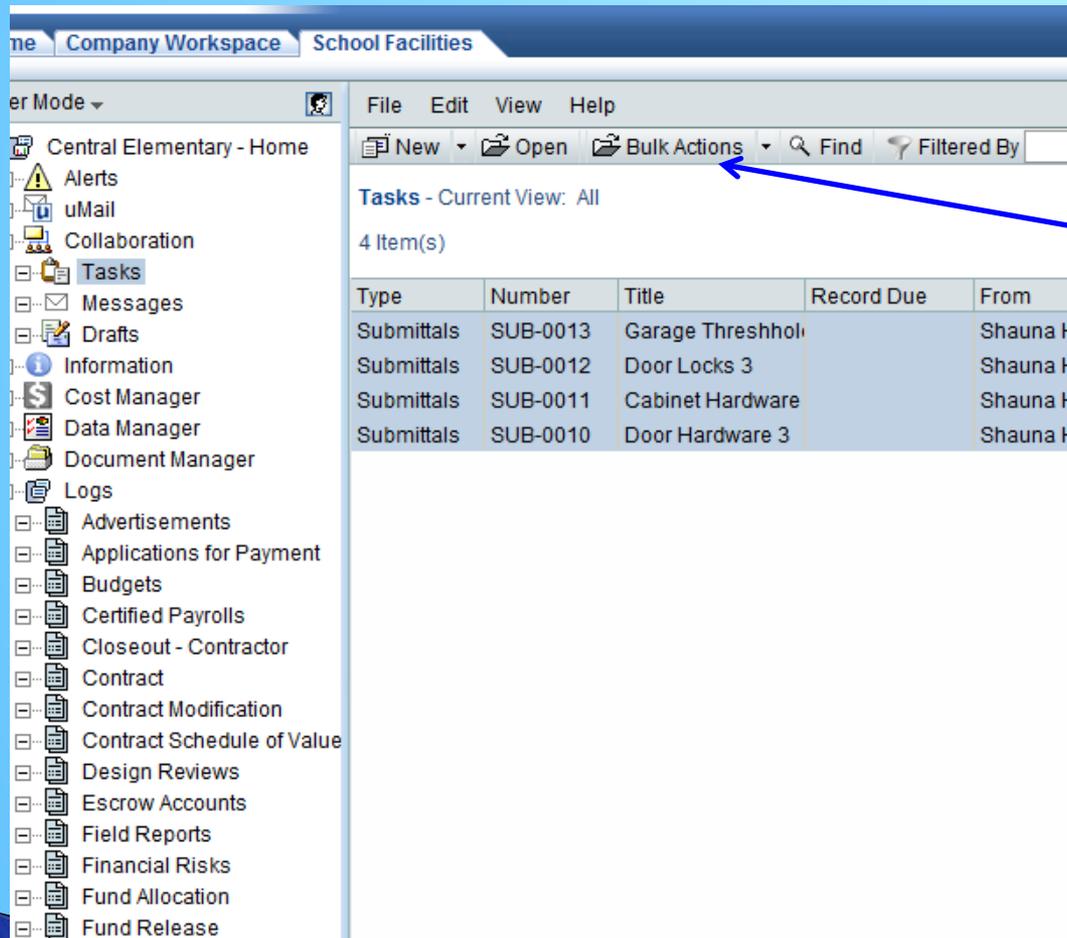
The screenshot shows a software interface with a left sidebar containing a navigation menu. The 'Tasks' menu item is highlighted, and a blue arrow points from it to a table of submittal records in the main window. The table has the following data:

Type	Number	Title	Record Due	From
Submittals	SUB-0013	Garage Threshold		Shauna H
Submittals	SUB-0012	Door Locks 3		Shauna H
Submittals	SUB-0011	Cabinet Hardware		Shauna H
Submittals	SUB-0010	Door Hardware 3		Shauna H

- ▶ When process is complete:
 - Click Collaboration
 - Click Tasks
- ▶ Highlight the new submittals

| Today | Tomorrow |
Together |

Create a Submittal Record



The screenshot shows a software interface with a menu bar (File, Edit, View, Help) and a toolbar containing 'New', 'Open', 'Bulk Actions', 'Find', and 'Filtered By'. A blue arrow points to the 'Bulk Actions' menu item. Below the toolbar, the 'Tasks' section is visible, showing 'Current View: All' and '4 Item(s)'. A table lists submittal records with columns for Type, Number, Title, Record Due, and From.

Type	Number	Title	Record Due	From
Submittals	SUB-0013	Garage Threshold		Shauna H
Submittals	SUB-0012	Door Locks 3		Shauna H
Submittals	SUB-0011	Cabinet Hardware		Shauna H
Submittals	SUB-0010	Door Hardware 3		Shauna H

▶ Click Bulk Actions

▶ This will open the first record to be updated

| Today | Tomorrow |
Together |

Create a Submittal Record

https://oaksci.training.osfc.ohio.gov/?task_id=10565&model=us1&project_id=1015&initiateBP=&bulk - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Discussion Close Window

General Submittals

Create entries for the Submittal log then take the workflow action "Request Submission" to send them to the assigned subcontractor.

Project Number: SFC-130322.02 Record Number: SUB-0013
Project Name: Central Elementary Creator: Shauna Hooks
Organization Name: Creation Date: 01/09/2014 11:18 AM Local (GMT-5)
Facility Name: Status: Pending

Action Details

(Click here to view latest content)

To: []
Cc: []
Send For:

Task Notes:

Submittals List

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

New Rename Move Delete

Attachments

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

Name	Line Item Status	Status Date	Variation?	Type
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Add Copy Import Remove Comments Download Find References

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

- ▶ Choose Workflow Action: Request Submission
- ▶ Click the To: box and choose the Subcontractor

| Today | Tomorrow |
Together |

Create a Submittal Record

https://oaks training.osfc.ohio.gov/?task_id=10565&model=us1&project_id=1015&initiateBP=&bulk - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Request Submission

Send Save Spelling... Discussion Close Window

General Submittals

Create entries for the Submittal log then take the workflow action "Request Submission" to send them to the assigned subcontractor.

Project Number: SFC-130322.02 Record Number: SUB-0013
Project Name: Central Elementary Creator: Shauna Hooks
Organization Name: Creation Date: 01/09/2014 11:18 AM Local (GMT-5)
Facility Name: Status: Pending

Action Details

Request Submission [Click here to view latest content](#)

To... Rita Nichols Task Notes:
Cc...
Send For: Fulfillment

Submittals List

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

New Rename Move Delete

Attachments

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

Name	Line Item Status	Status Date	Variation?	Type
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Add Copy Import Remove Comments Download Find References

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

- ▶ Click Send
- ▶ Once you click send the next record will open automatically, continue this process until all records have been submitted for fulfillment

| Today | Tomorrow |
Together |

Create a Submittal Record

- ▶ If you are unable to view the subcontractors you wish to submit the request to, or if you have any other issues , please contact OAKS CI at oaksci@ofcc.ohio.gov or call 614.644.2211