

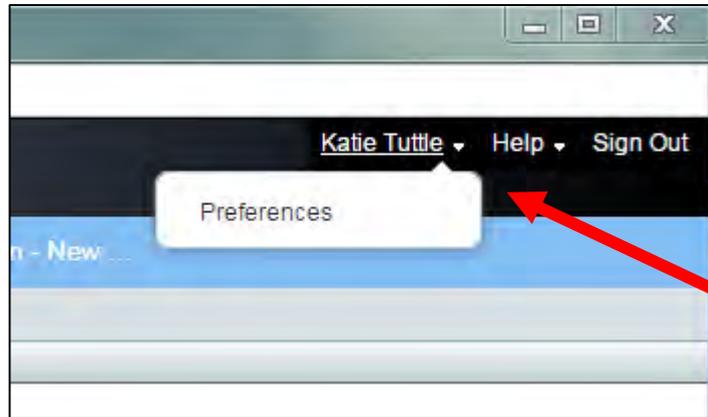


# Document Manager

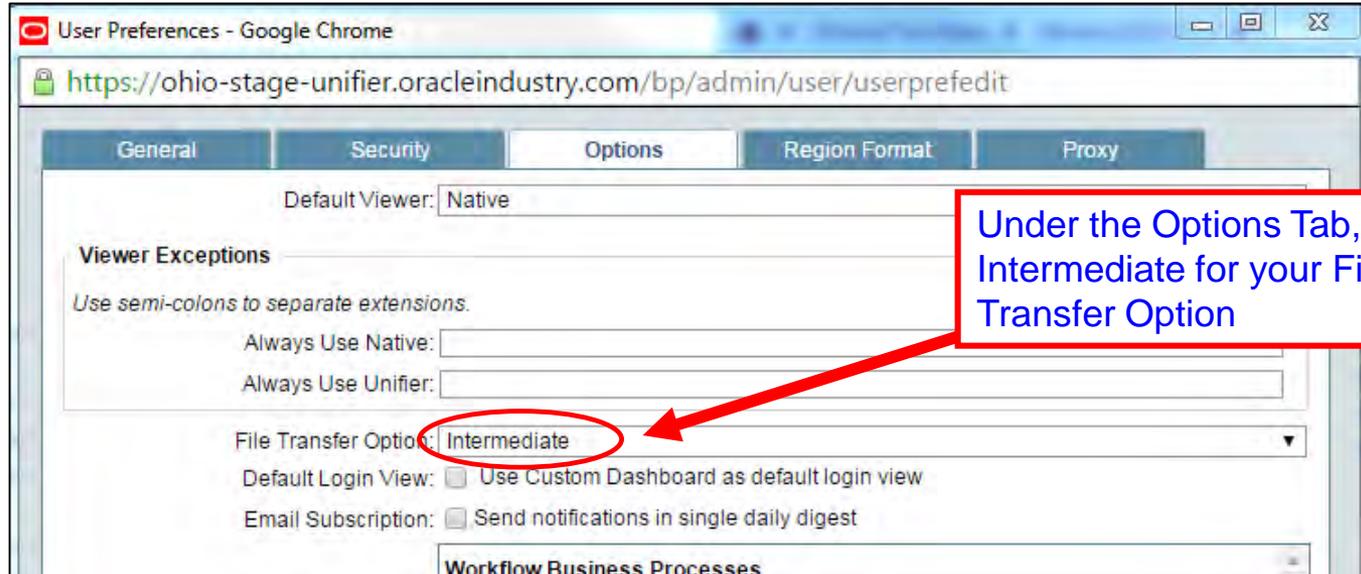
# About Document Manager

- ▶ 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



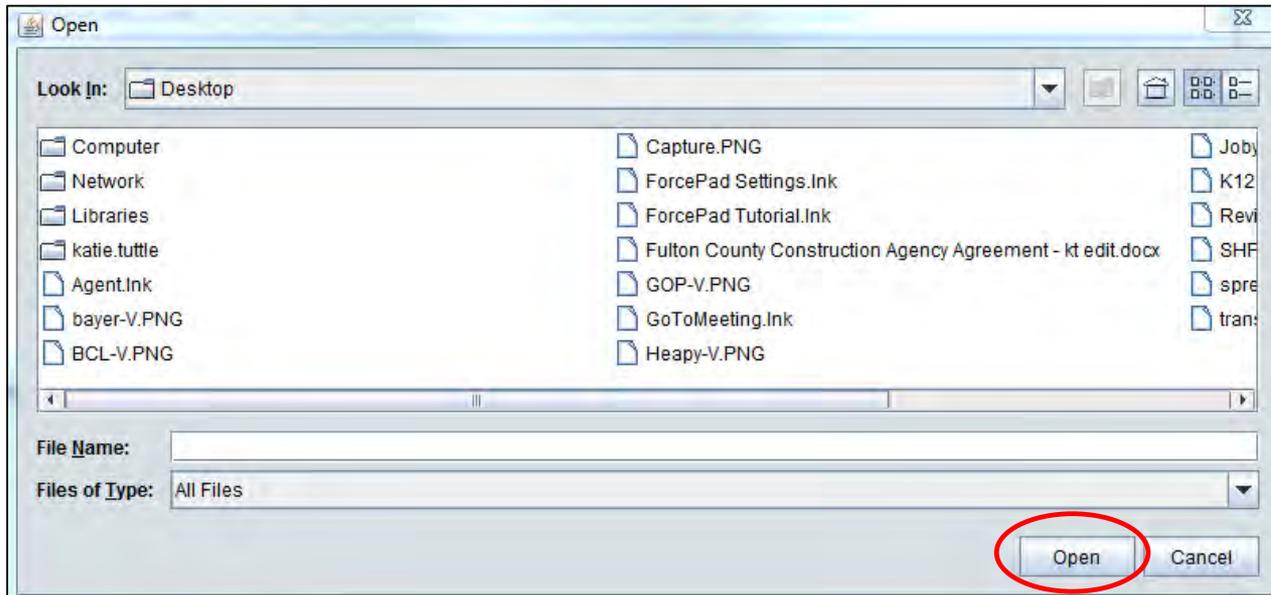
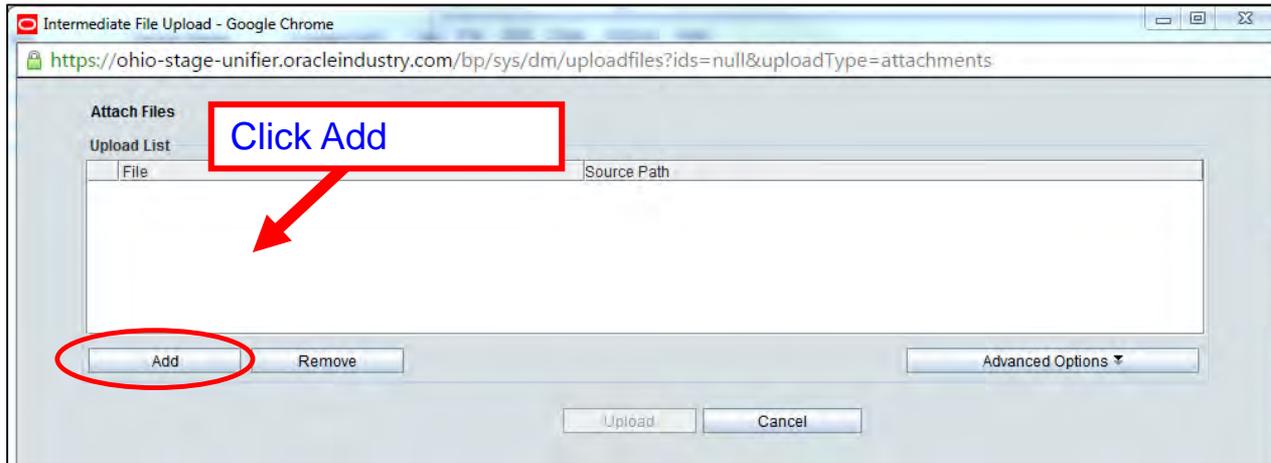
Under the Options Tab, select Intermediate for your File Transfer Option

# 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 "Navigate To..." field is empty. The left sidebar shows a tree view with "Documents" selected. The main content area shows a file explorer view with a toolbar containing "Open", "Find", "Upload", "Download", "Delete", "Check Out", "Comments", "Permissions", and "Properties". The "Upload" button is circled in red. A red arrow points from a box labeled "Click Upload" to the "Upload" button. Another red arrow points from a box labeled "Choose folder" to the "0200 Design" folder in the file explorer. Below the file explorer is a table of documents.

	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- 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

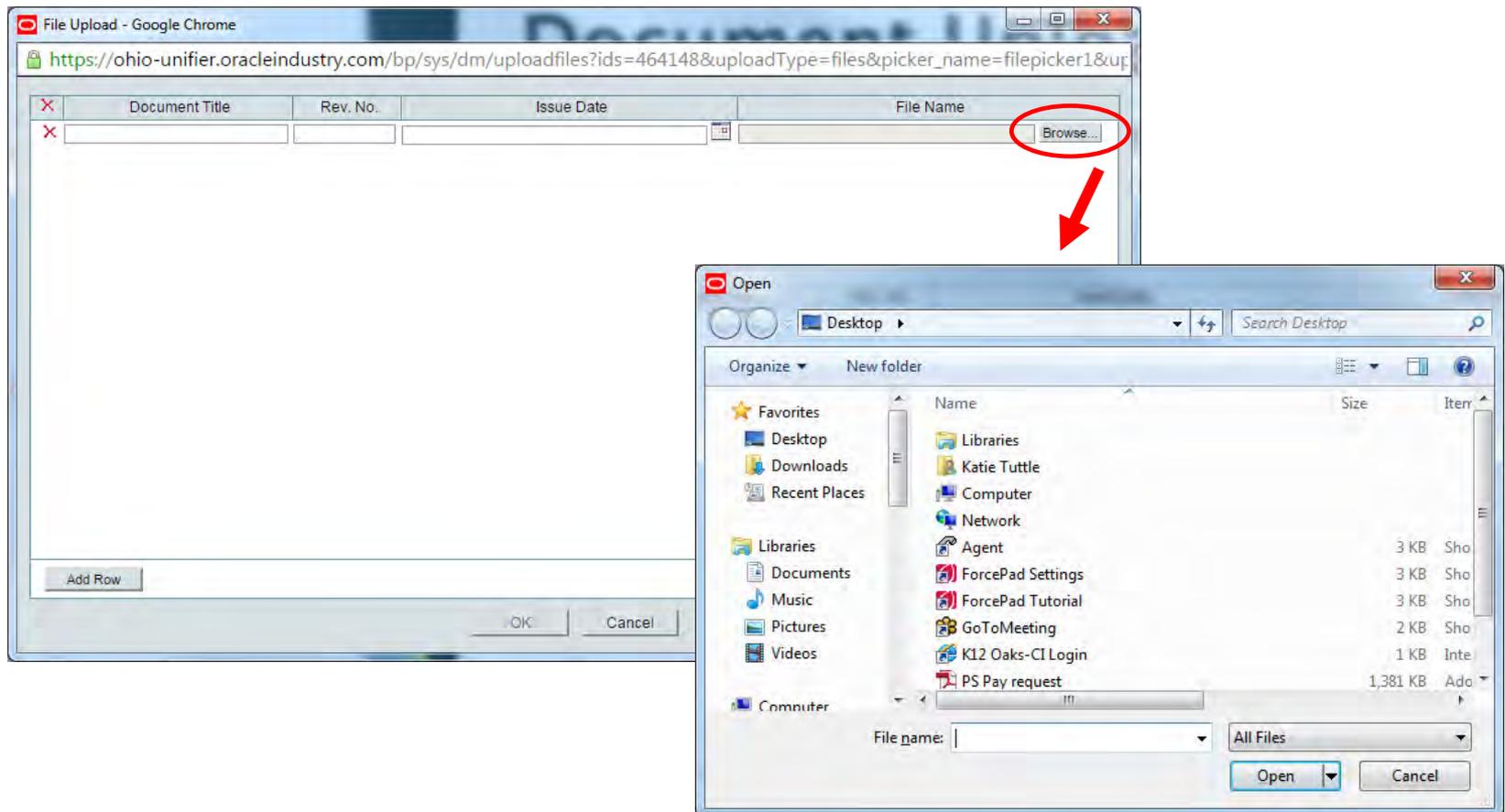
The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL: <https://ohio-unifier.oracleindustry.com>. The page title is "ORACLE PRIMAVERA UNIFIER" and the user is logged in as "Proxy for Katie Tuttle". The navigation pane on the left shows the "Documents" 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)

# 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



# Questions?

OAKS CI Support Desk Contact Info:

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