



Cloud Navigation



Using Oaks CI in the Cloud

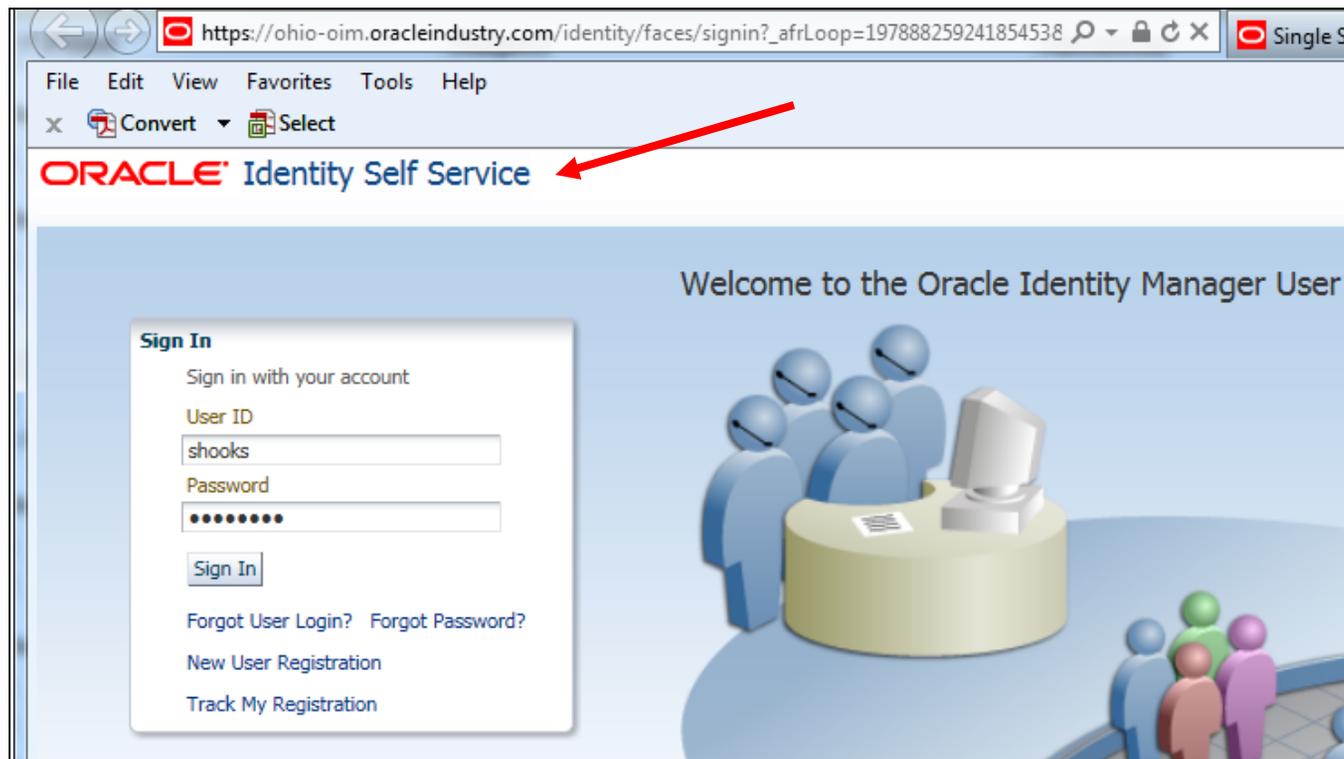
- ▶ Oaks CI is now housed in a cloud-based system at the following URL:
 - <https://ohio-unifier.oracleindustry.com>

- ▶ Passwords for Oaks CI are now housed in a separate system called Oracle Identity Manager (OIM) which can be accessed here:
 - <https://ohio-oim.oracleindustry.com/oim>

- ▶ In this Job Aid we will discuss:
 - Using OIM to manage your Oaks CI password (Pages 3–4)
 - Navigating Oaks CI (Page 5–15)
 - Navigating to Your Project (5–8)
 - Collaboration: Tasks, Messages, Drafts (9–13)
 - Document Manager (14)
 - Logs: Business Processes (15)

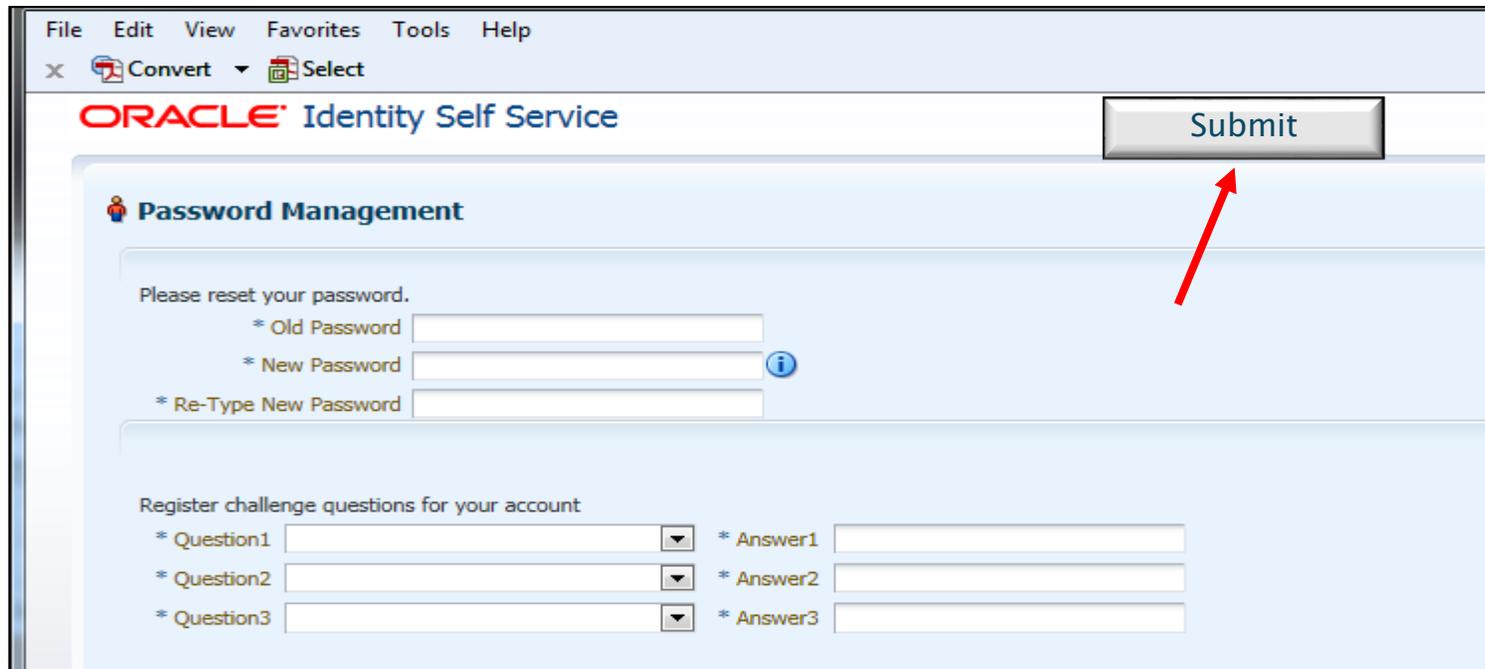
Oracle Identity Manager (OIM)

- ▶ When you navigate to the page, you should see “Oracle Identity Self Service” at the top of the page.
- ▶ Type in your Username and Password. This is the same as the login information you use for accessing Oaks CI.
- ▶ Click “Sign In”



Oracle Identity Manager (OIM)

- ▶ Once logged in, the system will prompt you to reset your password (if this is your first log in) and set your security questions
- ▶ Type in requested information and Click “Submit”. Then Click “Sign Out” to log out of OIM



The screenshot displays the Oracle Identity Self Service interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below the menu bar, there are two tabs: 'Convert' and 'Select'. The main heading is 'ORACLE Identity Self Service'. A 'Submit' button is located in the top right corner, with a red arrow pointing to it. The page content is titled 'Password Management' and includes the instruction 'Please reset your password.' followed by three input fields: '* Old Password', '* New Password', and '* Re-Type New Password'. Below this, there is a section for 'Register challenge questions for your account' with three rows of 'Question' and 'Answer' input fields.

Note: You will only utilize this site to change your password. No other Oaks CI functions will take place here.

Navigating OAKS CI

- ▶ Open any web browser

Note: While testing we found that Google Chrome works best for us

- ▶ Navigate to: <https://ohio-unifier.oracleindustry.com>

- ▶ 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 shows the Oracle Primavera Unifier interface. At the top, there are browser tabs for 'Home', 'Projects', 'Program', 'Agency', and 'Higher Ed'. A red arrow points to these tabs with the label 'Cross project tabs'. Below the tabs is a navigation bar with 'Home', 'Tasks', 'Messages', 'Drafts', and 'uMail'. The main content area is divided into sections: 'Announcements', 'Tasks or New uMails', and a summary of tasks and messages. A red arrow points to the 'Announcements' section with the label 'Announcements'. Below the announcements is a table of projects with columns for Project Number, Name, Tasks, uMails, and Company Name. A red arrow points to the 'Tasks' column of the table with the label 'Projects with Active Tasks'.

Cross project tabs

Announcements

Projects with Active Tasks

Project Number	Name	Tasks	uMails	Company Name
OCI-080001	Agency General Projects Test	25 Total, 11 New, 6 Late	5 New	State of Ohio
DMR-090010	Various Improvements, Tiffin & Northw		2 New	State of Ohio
DAS-100002	North High Complex - Phase 4		1 New	State of Ohio
DRC-050074	Lebanon Dietary Phase 2 -Food Prep		10 New	State of Ohio
DYS-990225	Interior Renovation Phase 3		5 New	State of Ohio
DRC-090026	Fire Alarm Upgrade - LeCl		1 New	State of Ohio
DRC-090052	Medical-Dental Addition - LorCl			

Locating your Organization or Project

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 time of "02/12/2015 12:24 PM". The navigation menu includes "Home", "Agency General Pr...", "Program", "Board of Regents", "Cleveland State Un...", and "Co". The search bar contains the text "bwcj-080002". A red box highlights the search bar and the search results, with a red arrow pointing to the search results. The search results are displayed in a table under the heading "Matched Locations".

Matched Locations	Organization/Project Name	Agency/Bureau
BWC-080002	Elevator Modernization	/Agency/Bure
BWC-100002	BWC Ethics Tenant Improvements	/Agency/Bureau of Workers' Compensation
DAS-11N005	BWC Parking Garage Lighting Improvement	/Agency/Department of Administrative Services
BWC-110001	L-16 Halon Replacement Project	/Agency/Bureau of Workers' Compensation
BWC-130001	Emergency generator power back up to the York chillers	/Agency/Bureau of Workers' Compensation
BWC-130002	OFCC Tenant Improvements	/Agency/Bureau of Workers' Compensation
BWC-130003	15th floor Halon Replacement	/Agency/Bureau of Workers' Compensation
BWC-140001	William Green Fire Alarm Upgrade	/Agency/Bureau of Workers' Compensation
BWC-150001	WGB Rear Lobby Renovation	/Agency/Bureau of Workers' Compensation
BWC01	Bureau of Workers' Compensation	/Agency

Below the "Matched Locations" table, there is a section for "Key Locations" with the following data:

Key Locations	Organization/Project Name	Status	Location
DMR-090010	Various Improvements, Tiffin & Northw	2 New	State of Ohio
DAS-100002	North High Complex - Phase 4	1 New	State of Ohio
DAS-050034	Liberty District Phase 2 Food Ser	10 New	State of Ohio

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

- Tasks: 25 Total, 9 New, 5 Late
- Messages: 1 New
- Draft Records: 49 New
- uMails: 72 New

Project Home Page

The screenshot shows the Oracle Primavera Unifier interface. The browser address bar displays the URL <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page header includes the Oracle Primavera Unifier logo, the user name 'Proxy for Kayli', and the last login time '07/22/2015 11:21 AM'. The breadcrumb navigation shows the path: Agency > Department of... > Lock-Door Up... The left sidebar contains a navigation menu with the following items: Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. Red arrows point to the Collaboration, Document Manager, and Logs items. The main content area is titled 'Lock-Door Upgrade - Home' and contains a 'Summary' tab and a 'Details' section. The 'Details' section provides the following information:

Project Number:	DRC-16L006
Project Name:	Lock-Door Upgrade
Description:	This project will replace the locking system in the segregation housing unit (ranges C, D, E, and F) approx. 72 cell from doors at Chillicothe Correctional Institution.
Administrator:	Moenique Morris
Currency:	United States Dollar (USD)
Status:	Active
Email Address:	2105-test@oracle.com

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!

Unifier@https://ohio-unifier.oracleindustry.com - Google Chrome
https://ohio-unifier.oracleindustry.com/bp/g/nav/index

ORACLE PRIMAVERA UNIFIER Last login: 08/18/2015 05:51 AM

Company Workspace Miami Trace-LSD-... x +

Navigate To... School Facilities Miami Trace-L...

Miami Trace-LSD-FAY-CFAP-2014 File Edit View Help

Miami Trace-LSD-FAY-CFAP-2014 - Home

Summary

Image

Details

OAKS Code:	SFC-160389
District Project Identifier:	Miami Trace-LSD-FAY-CFAP-2014
Description:	Build New High to house 831 9-12, CT students in a 129,613.84 square foot facility at a total project cost of \$34,638,594.68
Administrator:	Kaylie Ruff
Currency:	United States Dollar (USD)
Status:	Active

New Open Find

Collaboration houses:

- Tasks
- Messages
- Drafts

Tasks

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, and a red arrow points from a text box below to it. The main content area displays a table of tasks with columns: Type, Number, Title, Record Due, From, Sent for, Task Due, and Received. The table contains 10 items.

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 - ?		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 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 'Messages' folder is highlighted in blue. A red arrow points from a text box to this folder. The main content area shows a 'Messages' window with a menu bar (File, Edit, View, Help) and a toolbar (New, Open, Find, Delete). Below the toolbar, it says 'Messages - Current View: All' and '12 Item(s)'. A table lists 12 messages with columns for Type, From, Subject, and Received Date.

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	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

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 is titled 'Projects (Standard)' and contains several folders, including 'Drafts', which is highlighted. A red arrow points from a text box to the 'Drafts' folder. The main content area shows a list of items in the 'Drafts' folder, with columns for 'Type', 'Number', 'Title', and 'Last Saved'.

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 Requ			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

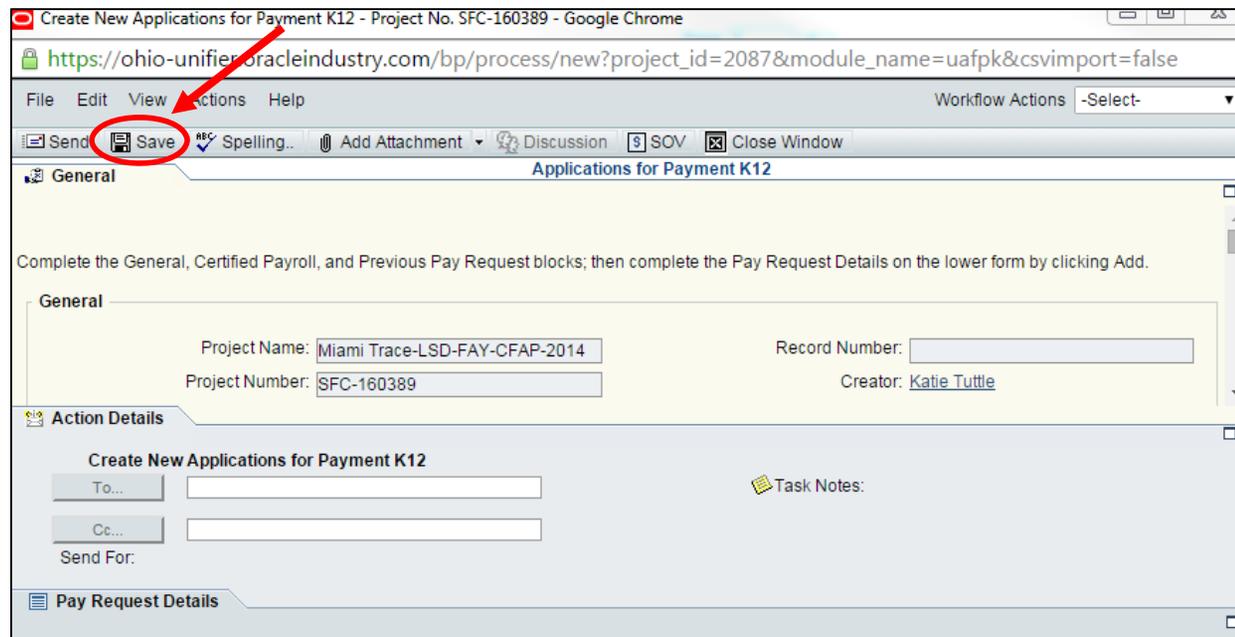
Drafts and Timeout

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



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

ORACLE PRIMAVERA UNIFIER Last login: 08/18/2015 05:51 AM

Miami Trace-LSD-FAY-CFAP-2014

Navigate To... School Facilities Miami Trace-LSD-FAY-CFAP-2014

File Edit View Help

New Open Find Upload Download Delete Check Out Comments Permissions Properties

Current Phase RFQ - Current View: All

2 Item(s)

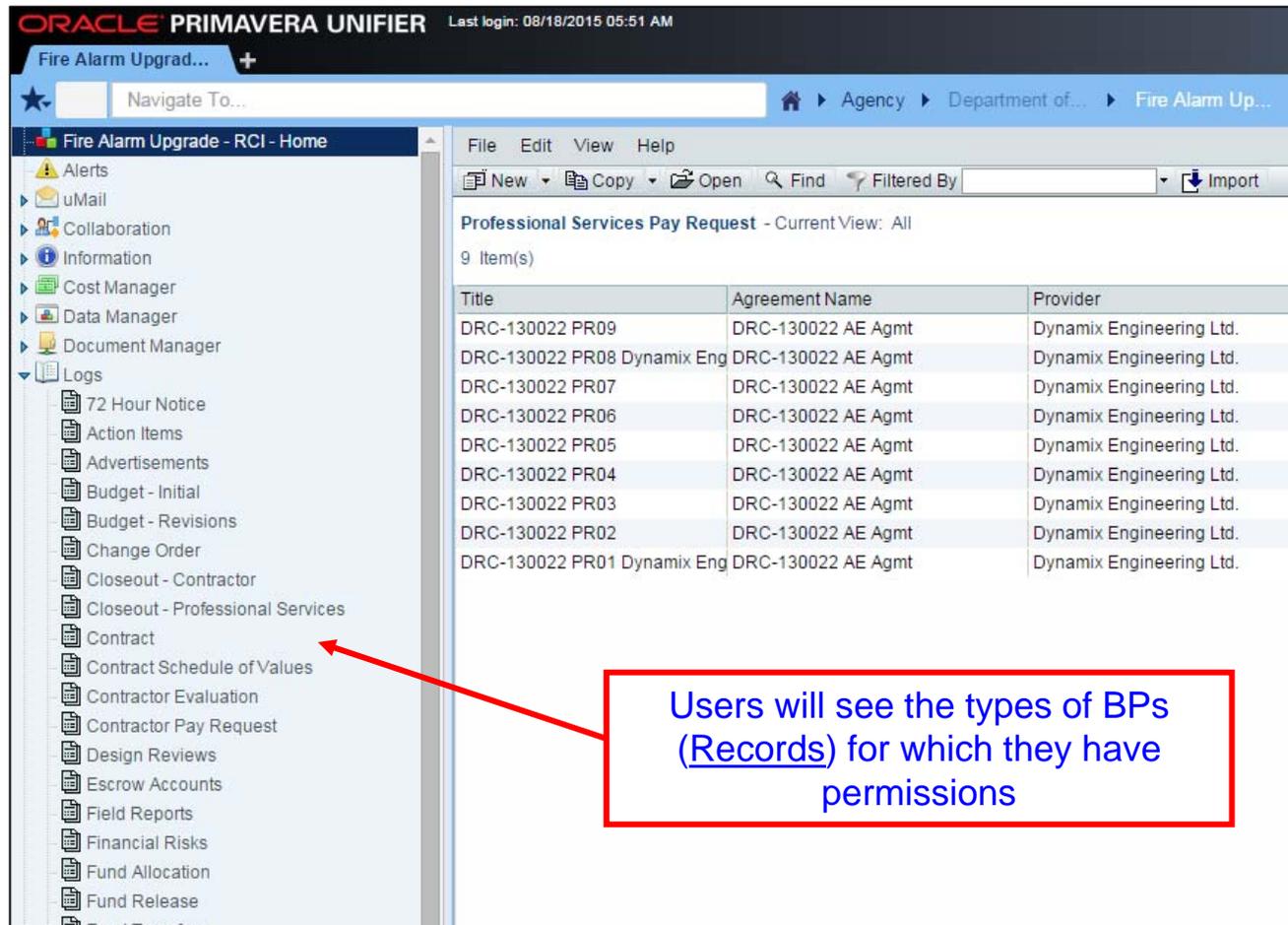
	Ref.	BP	Name	Size	Upload Date
			AE RFQ F110-02-AE-RFQ (MT HS) FINAL Version 7-26-15.d	64 KB	07/29/2015
			AE RFQ F110-02-AE-RFQ (MT HS) FINAL Version 7-26-15.p	64 KB	07/29/2015

Note: For more information on uploading documents, see the Document Manager Job Aid on our Website

Logs

Logs house Business Processes or “BPs” (Records)

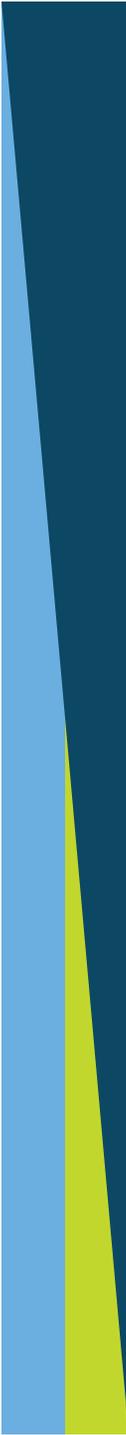
- ▶ A BP is any Record that has been created (i.e. Pay Requests, Submittals, etc.) and submitted through a workflow for review or approval.



The screenshot displays the Oracle Primavera Unifier interface. The left sidebar shows a navigation tree with the 'Logs' folder expanded, listing various business processes. A red arrow points from a text box to the 'Contractor Pay Request' item in this list. The main window shows a table of 'Professional Services Pay Request' records.

Title	Agreement Name	Provider
DRC-130022 PR09	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR08 Dynamix Eng	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR07	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR06	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR05	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR04	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR03	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR02	DRC-130022 AE Agmt	Dynamix Engineering Ltd.
DRC-130022 PR01 Dynamix Eng	DRC-130022 AE Agmt	Dynamix Engineering Ltd.

Users will see the types of BPs (Records) for which they have permissions



Questions?

Please contact OAKS CI Support Desk:

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614.644.2211