



Printing Records & Custom Prints Agency/Higher-Ed



Purpose

▶ Custom Prints

- ▶ Custom Prints provide a way to use data from a single OAKS CI record to create a Microsoft Word document.
- ▶ The resulting document may then be edited and saved for use in executing the overall record.
- ▶ With the initiation of DocuSign (electronic signature), the Project Coordinator uses the Custom Print to create the DocuSign Document

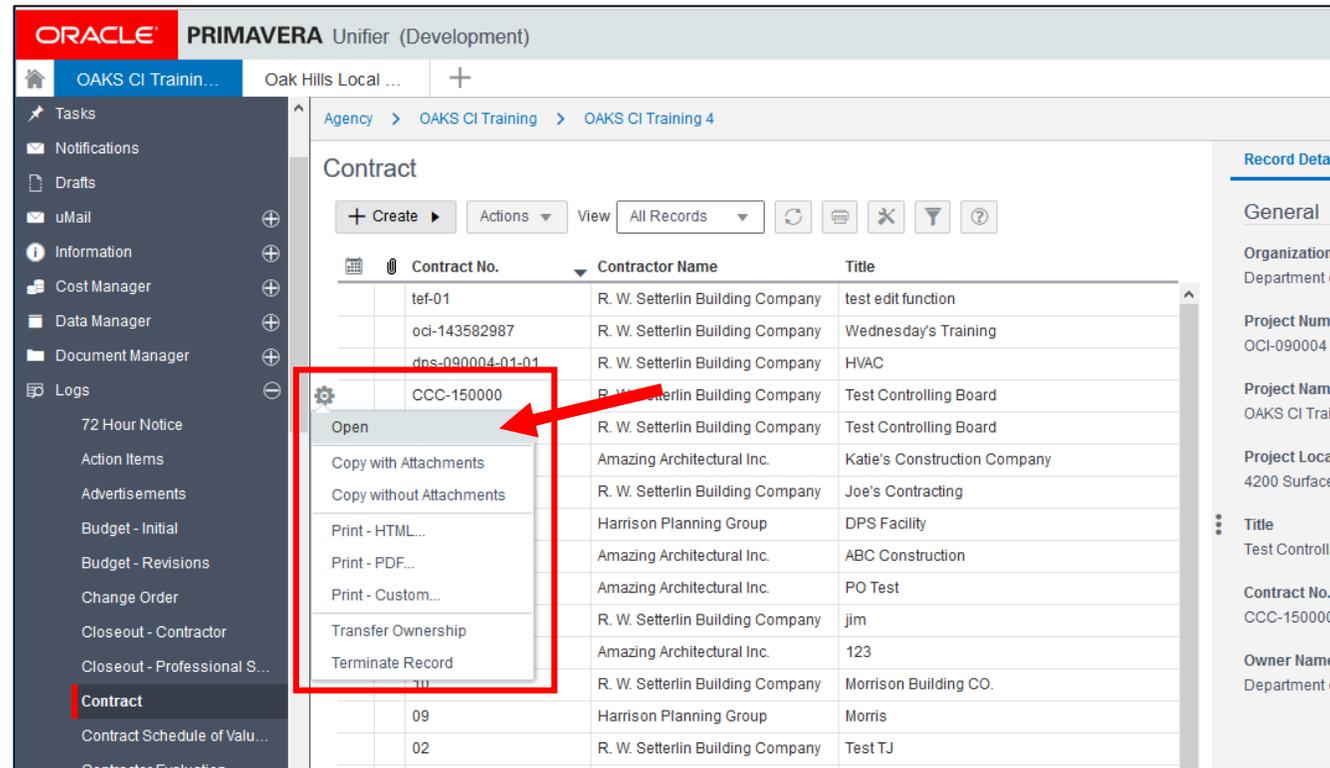
▶ Print a copy of a Record

- ▶ You can also print a copy of a record either directly to a printer or to a PDF document



Create Custom Print

- ▶ To begin, choose a record you want to use to create a custom print in Logs or Tasks.
- ▶ Click the gear icon  next to the record you want to use and then click Open



The screenshot displays the Oracle Primavera Unifier (Development) interface. The main window shows a table of contracts with columns for Contract No., Contractor Name, and Title. The record 'CCC-150000' is highlighted, and a context menu is open over it, showing options like 'Open', 'Copy with Attachments', and 'Print - Custom...'. A red box highlights the gear icon next to the record, and a red arrow points to the 'Open' option in the menu.

Contract No.	Contractor Name	Title
tef-01	R. W. Setterlin Building Company	test edit function
oci-143582987	R. W. Setterlin Building Company	Wednesday's Training
dps-090004-01-01	R. W. Setterlin Building Company	HVAC
CCC-150000	R. W. Setterlin Building Company	Test Controlling Board
	R. W. Setterlin Building Company	Test Controlling Board
	Amazing Architectural Inc.	Katie's Construction Company
	R. W. Setterlin Building Company	Joe's Contracting
	Harrison Planning Group	DPS Facility
	Amazing Architectural Inc.	ABC Construction
	Amazing Architectural Inc.	PO Test
	R. W. Setterlin Building Company	jim
	Amazing Architectural Inc.	123
	R. W. Setterlin Building Company	Morrison Building CO.
09	Harrison Planning Group	Morris
02	R. W. Setterlin Building Company	Test TJ



Create Custom Print

- ▶ At the top-right of the record, click the blue Menu button
- ▶ Choose **File -> Print -> Custom**

The screenshot shows a web browser window displaying a contract record. The browser title is "Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213965/undefined/undefined?_uref=uuu745200052t2". The page title is "Contract". There are two tabs: "General" (selected) and "WBS Detail".

The "General" tab contains the following information:

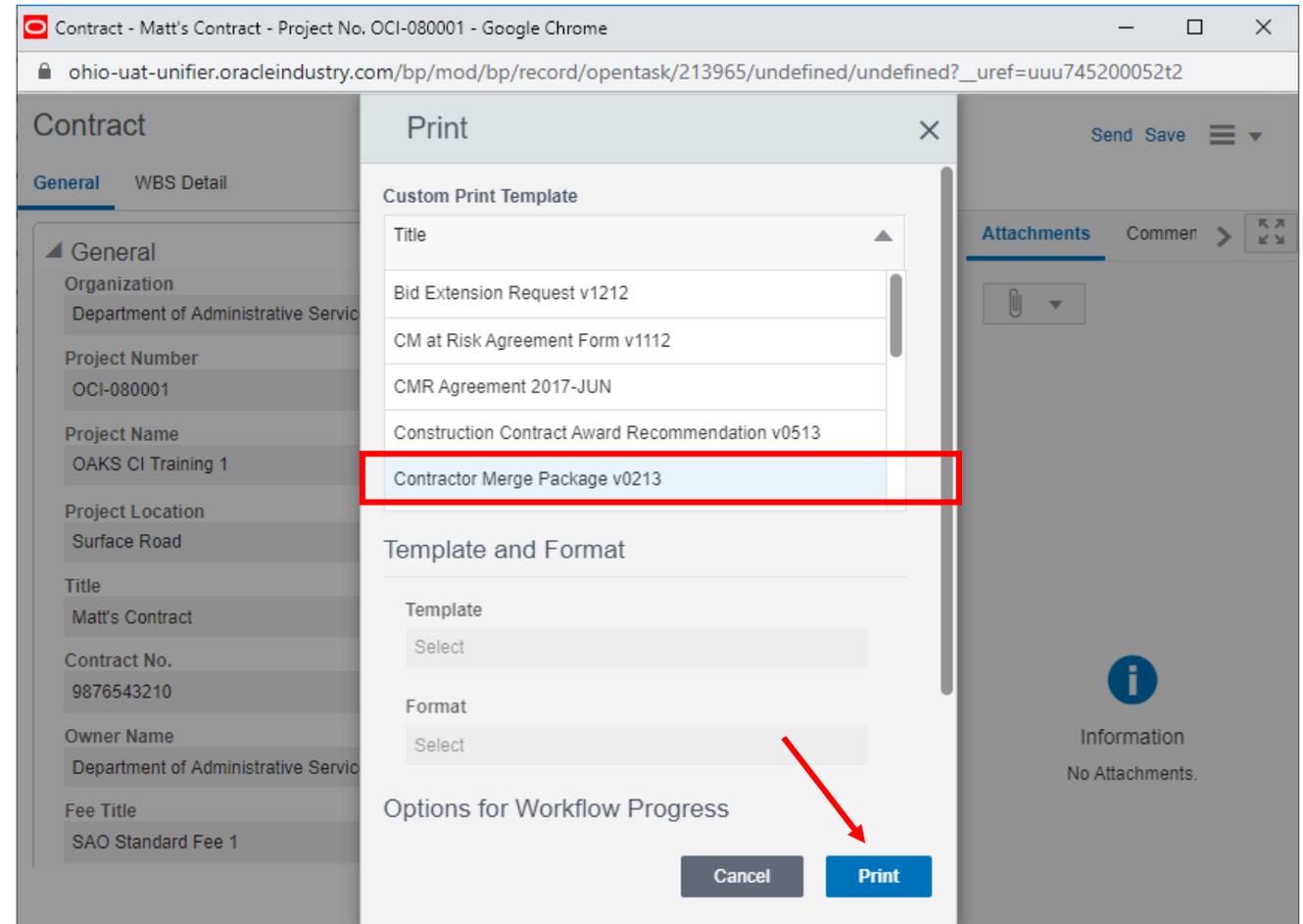
Organization	Record Number
Department of Administrative Services	CON-00023
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	07/28/2020 11:44 AM (UTC-8)
Project Location	Status
Surface Road	Pending
Title	County
Matt's Contract	Franklin
Contract No.	Contracting Authority
9876543210	State Architects Office
Owner Name	EDGE Waiver
Department of Administrative Services	No
Fee Title	EDGE Goal Percent
SAO Standard Fee 1	5
OFCC Fee Waiver	EDGE Commitment (%)
No	5

At the top right of the record, there are buttons for "Send", "Save", and a blue menu button (three horizontal lines). A red arrow points to the menu button. The menu is open, showing options: "Export Line Item Template", "Print", "Reload", "Review", "Terminate Record", "Transfer Ownership...", "Undo Accept Task", "Help", and "Close". The "Print" option is highlighted with a red box. A red arrow points to the "Print" option. A sub-menu is open for "Print", showing options: "HTML ...", "PDF ...", and "Custom ...". The "Custom ..." option is highlighted with a red box. A red arrow points to the "Custom ..." option.



Create Custom Print

- ▶ Choose the Template you want to print
- ▶ Click **Print**



Create Custom Print

- ▶ A Word document will be downloaded and appear at the bottom of your record screen
- ▶ Click to open

The screenshot shows a web browser window with the title "Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213965/undefined/undefined?_uref=uuu745200052t2". The page displays contract information under the "General" tab. A red arrow points to a download button at the bottom of the page, which is labeled "Contractor+Merg....doc".

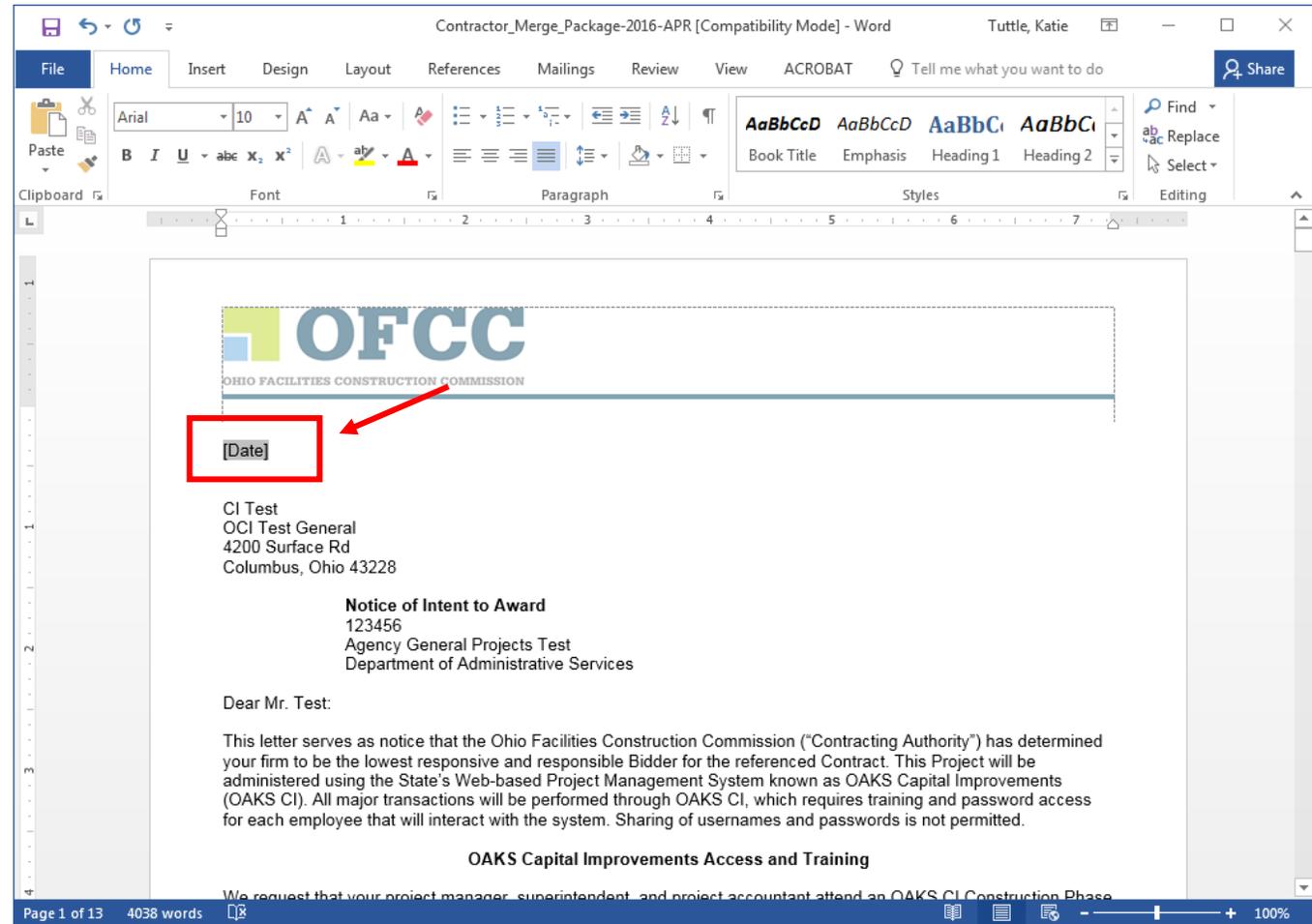
General	
Organization	Department of Administrative Services
Record Number	CON-00023
Project Number	OCI-080001
Creator	Matthew Weber
Project Name	OAKS CI Training 1
Creation Date	07/28/2020 11:44 AM (UTC-8)
Project Location	Surface Road
Status	Pending
Title	Matt's Contract
County	Franklin
Contract No.	9876543210
Contracting Authority	State Architects Office
Owner Name	Department of Administrative Services
EDGE Waiver	No
Fee Title	SAO Standard Fee 1
EDGE Goal Percent	5
OFCC Fee Waiver	No
EDGE Commitment (%)	5

Attachments: No Attachments.



Edit Custom Print

- ▶ Fill in all gray fields as necessary
- ▶ Distribute associated letters as appropriate



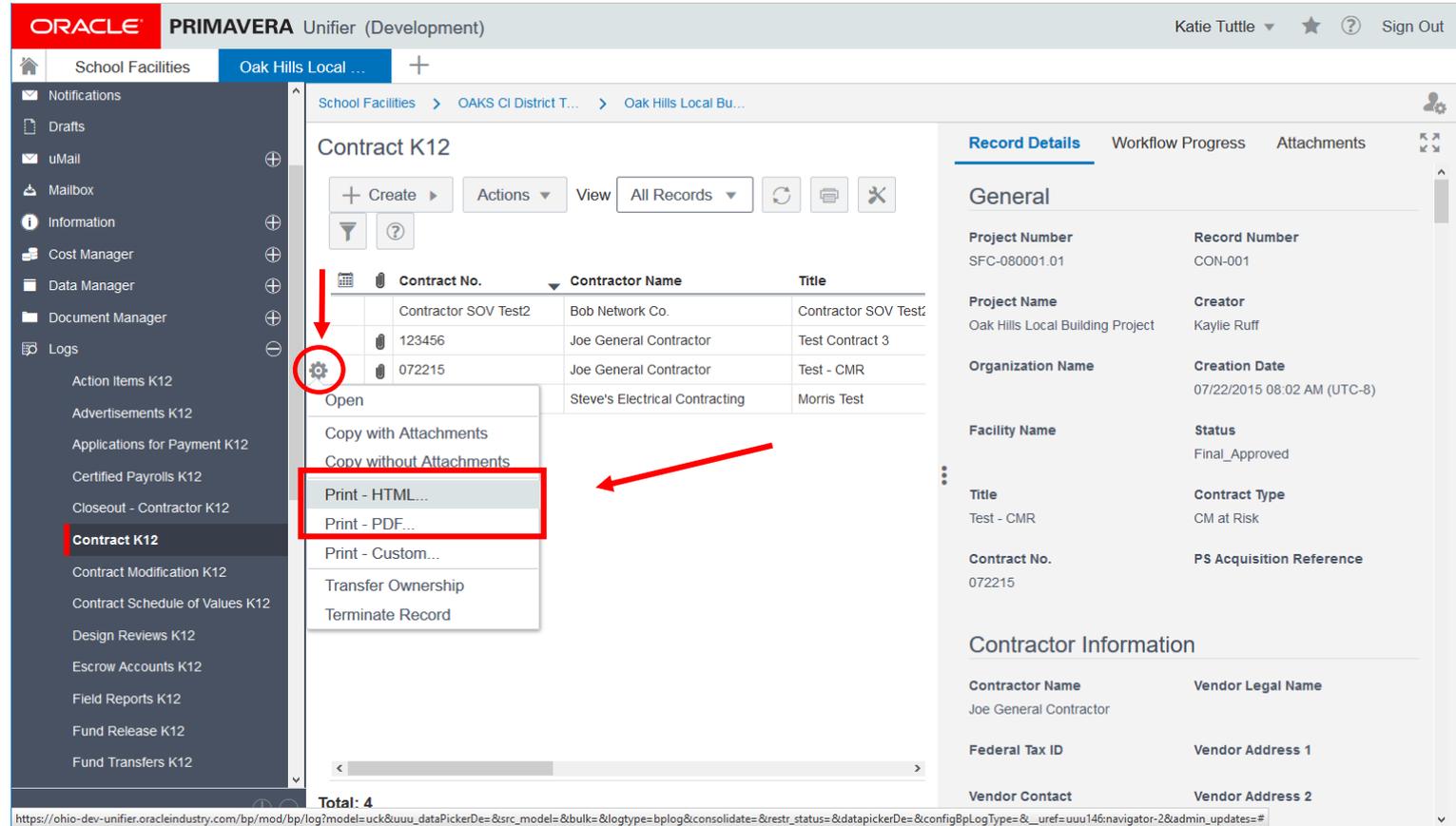
Create Custom Print

- ▶ At this point, the next steps for the custom print depend on the type of record with which it is associated.
- ▶ Some custom prints are created by the Project Coordinator and serve as a DocuSign document.
- ▶ Other custom prints will need to be signed, scanned back into the computer, and attached to the OAKS CI record.
- ▶ For more specific information regarding the specific procedures for using custom prints, please discuss with your Project Manager, Project Coordinator, or OAKS CI Support Staff.



Print a Copy of a Record

- ▶ To begin, choose a record you want to print in Logs or Tasks.
- ▶ Click the gear icon  next to the record you want to use and then click Print- HTML or Print- PDF



The screenshot displays the Oracle Primavera Unifier interface. The main content area shows the 'Contract K12' record details, including a table of contract records. A red circle highlights the gear icon next to the record with Contract No. 072215. A red box highlights the 'Print - HTML...' and 'Print - PDF...' options in the dropdown menu. A red arrow points to the 'Print - PDF...' option.

Contract No.	Contractor Name	Title
Contractor SOV Test2	Bob Network Co.	Contractor SOV Test2
123456	Joe General Contractor	Test Contract 3
072215	Joe General Contractor	Test - CMR
	Steve's Electrical Contracting	Morris Test

Record Details | Workflow Progress | Attachments

General

Project Number SFC-080001.01	Record Number CON-001
Project Name Oak Hills Local Building Project	Creator Kaylie Ruff
Organization Name	Creation Date 07/22/2015 08:02 AM (UTC-8)
Facility Name	Status Final_Approved
Title Test - CMR	Contract Type CM at Risk
Contract No. 072215	PS Acquisition Reference

Contractor Information

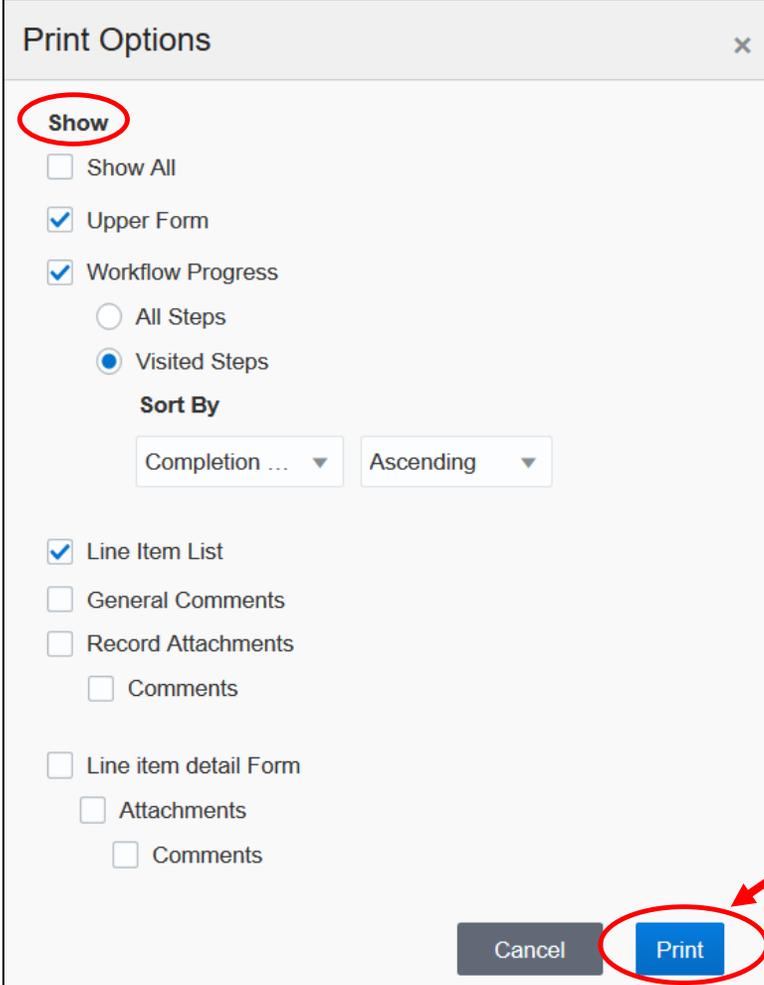
Contractor Name Joe General Contractor	Vendor Legal Name
Federal Tax ID	Vendor Address 1
Vendor Contact	Vendor Address 2

Total: 4



Choose Print Options

- ▶ Select which items you wish to view on your print
- ▶ Click **Print**



Print Options

Show

Show All

Upper Form

Workflow Progress

All Steps

Visited Steps

Sort By

Completion ... ▾ Ascending ▾

Line Item List

General Comments

Record Attachments

Comments

Line item detail Form

Attachments

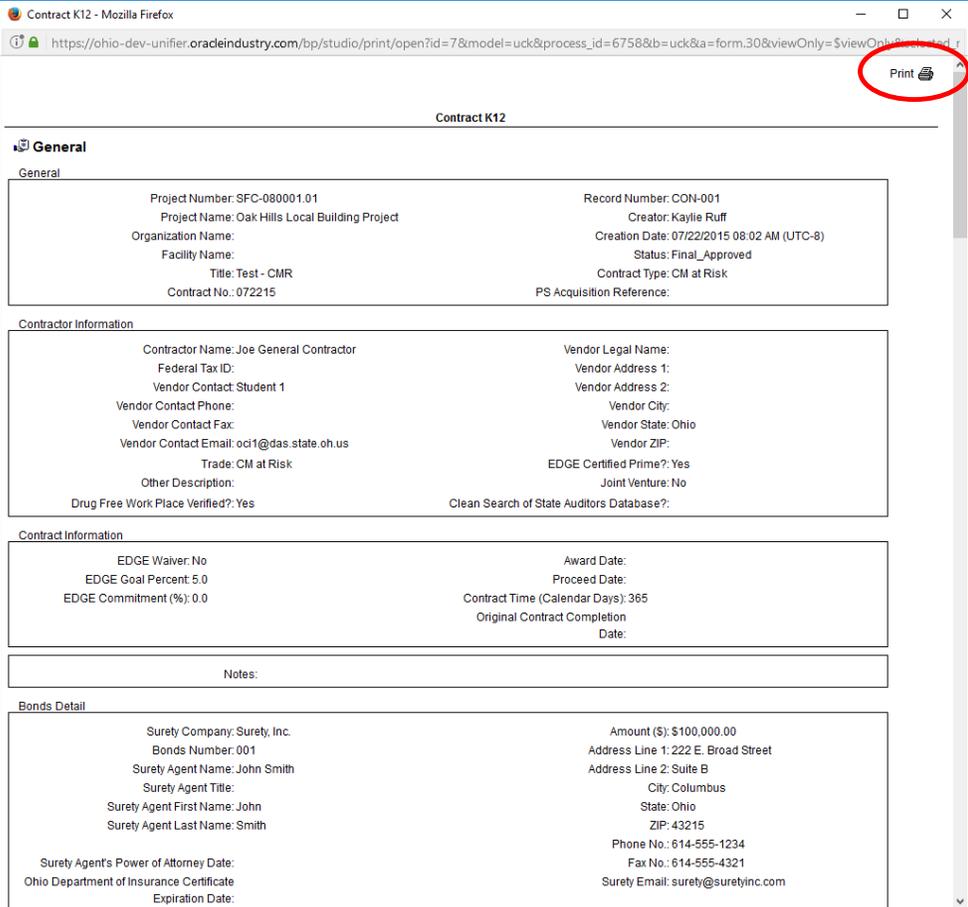
Comments

Cancel **Print**



Print a Record

- ▶ If you chose **PDF**, the file will download so you can open or save it
- ▶ If you chose **HTML**, you will see the screen to the right and you can print your document from here



The screenshot shows a web browser window titled "Contract K12 - Mozilla Firefox" with the URL "https://ohio-dev-unifier.oradeindustry.com/bp/studio/print/open?id=7&model=uck&process_id=6758&b=uck&a=form.30&viewOnly=\$viewOnly". A red circle highlights the "Print" button in the top right corner of the browser window, with a red arrow pointing to it.

Contract K12

General

Project Number: SFC-080001.01	Record Number: CON-001
Project Name: Oak Hills Local Building Project	Creator: Kaylie Ruff
Organization Name:	Creation Date: 07/22/2015 08:02 AM (UTC-8)
Facility Name:	Status: Final_Approved
Title: Test - CMR	Contract Type: CM at Risk
Contract No.: 072215	PS Acquisition Reference:

Contractor Information

Contractor Name: Joe General Contractor	Vendor Legal Name:
Federal Tax ID:	Vendor Address 1:
Vendor Contact: Student 1	Vendor Address 2:
Vendor Contact Phone:	Vendor City:
Vendor Contact Fax:	Vendor State: Ohio
Vendor Contact Email: oc1@dss.state.oh.us	Vendor ZIP:
Trade: CM at Risk	EDGE Certified Prime?: Yes
Other Description:	Joint Venture: No
Drug Free Work Place Verified?: Yes	Clean Search of State Auditors Database?:

Contract Information

EDGE Waiver: No	Award Date:
EDGE Goal Percent: 5.0	Proceed Date:
EDGE Commitment (%): 0.0	Contract Time (Calendar Days): 365
	Original Contract Completion Date:

Notes:

Bonds Detail

Surety Company: Surety, Inc.	Amount (\$): \$100,000.00
Bonds Number: 001	Address Line 1: 222 E. Broad Street
Surety Agent Name: John Smith	Address Line 2: Suite B
Surety Agent Title:	City: Columbus
Surety Agent First Name: John	State: Ohio
Surety Agent Last Name: Smith	ZIP: 43215
	Phone No.: 614-555-1234
Surety Agent's Power of Attorney Date:	Fax No.: 614-555-4321
Ohio Department of Insurance Certificate	Surety Email: surety@suretyinc.com
Expiration Date:	



Questions?

Please contact OAKS CI Support Desk:

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614.644.2211

