



Local Consultant List Amendments

Agency/Higher-Ed



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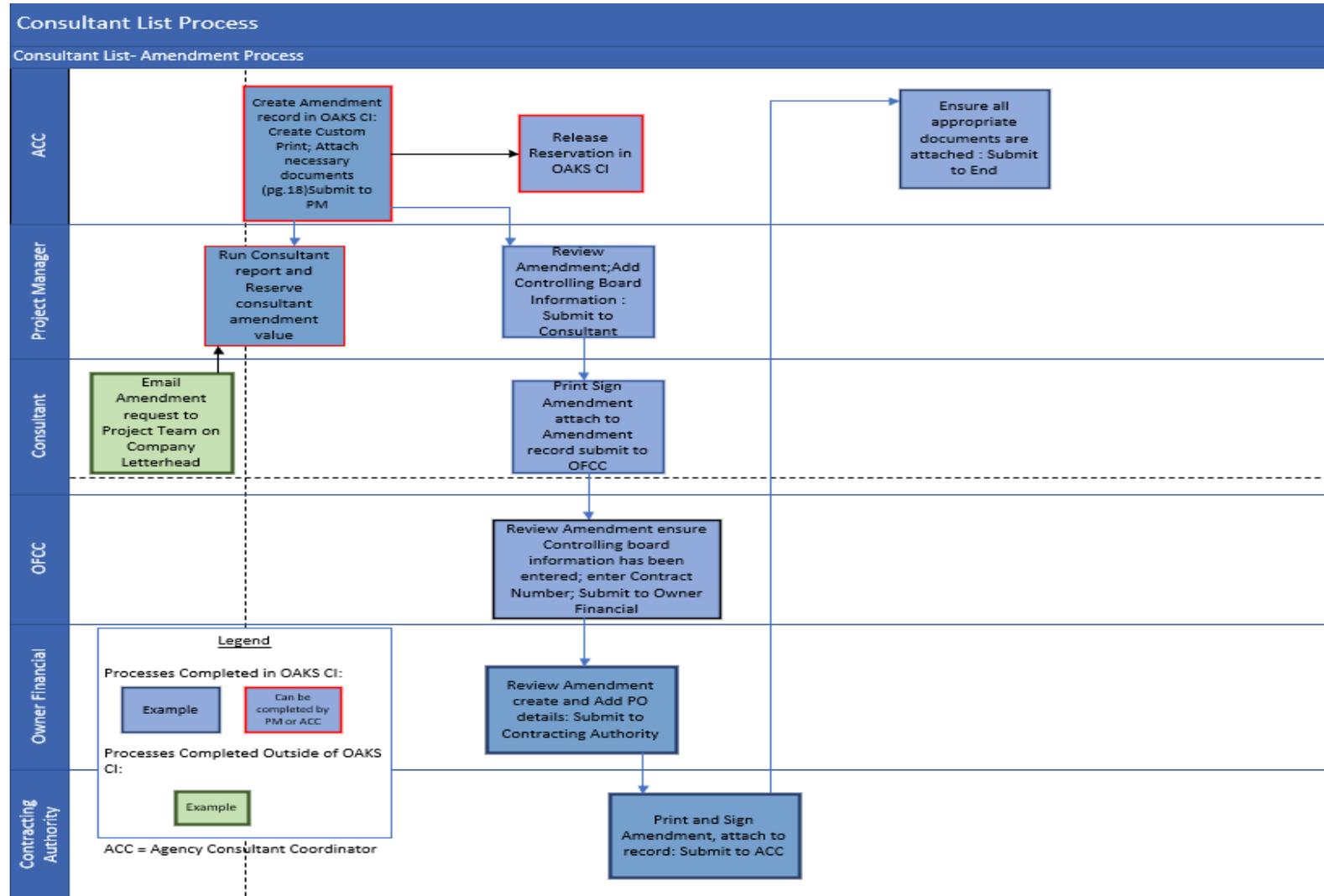


Consultant Amendment

- Prior to creating a Professional Services (Consultant) Amendment record in OAKS CI:
 - Consultant will email project team with the Amendment request
 - The request must be on their company's letterhead.
 - A Consultant Reservation must be created by the PC or PM
 - Once the Amendment has been created and submitted the Reservation status must be updated to Complete



Amendment Process



Notes on Amendments

- Revisions to the scope of work of a Professional Services Provider requires written authorization from the Contracting Authority
- Adjustments in basic services fees, additional services, or reimbursable expenses resulting from changes in scope of work or additional time must be processed and approved by the Contracting Authority with revisions in funding certified by the Owner



Purpose & Procedure

- The PS (Consultant) Amendment Business Process (BP):
 - Provides for the submission, review, and approval of amendments to the Professional Services Agreement
 - Provides the Amendment document and other necessary communication using custom prints



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

▶ Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...>. The page displays a search results table for projects. The table has the following columns: Name, Number, and Location. The search bar at the top contains the text "DPS". A red box highlights a "+" sign in the top right corner of the search results area. Red arrows labeled 'a', 'b', and 'c' point to the "+" sign, the search bar, and a table row respectively.

Name	Number	Location
Ohio State Highway Patrol Post 44	DPS:080001	/Agency/Department of Public Safety
OSHP Post 23 LEADS Building	DPS:110001	/Agency/Department of Public Safety
ODPS ACF Standing Seam Roof Renovation	DPS:110003	/Agency/Department of Public Safety
LEADS Data Center Alum Creek Facility	DPS:110006	/Agency/Department of Public Safety
OSHP Academy Range Equip. Replacement	DPS:110009	/Agency/Department of Public Safety
ODPS - EOC Reorganization	DPS:110010	/Agency/Department of Public Safety
OSHP Academy Maintenance & Repair Project	DPS:120001	/Agency/Department of Public Safety
OSHP Alum Creek Crime Lab Addition	DPS:120002	/Agency/Department of Public Safety
Academy HVAC Replacement-Chiller & Range ...	DPS:120004.02	/Agency/Department of Public Safety
Alum Creek HVAC	DPS:130001	/Agency/Department of Public Safety



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

- Click Logs
- Select: Professional Services Amendments
- Click Create

- *If given a Workflow Option:
Select - **Consultant List Amendment***

ORACLE Primavera Unifier (Development)

OAKS CI Admin Company Work... Projects OAKS CI Traini... Higher Ed School Facilities Organization Te... OAKS

Agency > OAKS CI Training > OAKS CI Training 1

Professional Services Agreements

+ Create Actions View

Allocation Adjustment	Professional Services Provider	Agreement Type	Total Agreement Amo...	CO Fee
Consultant List Amendment	OAKS Plumbing	Design	\$1,000.00	
Facilitator Work Assignment	OAKS Plumbing	Design	\$0.00	
Locally Administered Small Agency	Amazing Architectural Inc.	Design	\$15,000.00	
OFCC Amendment V3.01	Amazing Architectural Inc.	Design	\$15,000.00	
OFCC Amendment with External AE	Sands Decker Ltd.	Design	\$325,000.00	
OFCC/Agency Amendment v2	Sands Decker Ltd.	Design	\$40,000.00	
My Company	OAKS Plumbing	Design	\$10,000.00	
My Company	Sands Decker Ltd.	Design	\$15,000.00	
My Company	OAKS Plumbing	Design	\$15,000.00	
My Company	Sands Decker Ltd.	Design	\$15,000.00	
My Company Agreement	Sands Decker Ltd.	Design	\$4,000.00	
Agreement S4	Sands Decker Ltd.	Design	\$11,000.00	
Agreement	Sands Decker Ltd.	Design	\$13,500.00	
Agreement 1	Sands Decker Ltd.	Commissioning	\$11,000.00	
Agreement 27	Sands Decker Ltd.	Design	\$11,000.00	
DMH -100012 Mental Health Kit...	OAKS Plumbing	Design	\$25,000.00	
Miles McClellan Construction Agr...	Sands Decker Ltd.	CM	\$20,000.00	
MM Agreement 1	Sands Decker Ltd.	CM	\$20,000.00	
LW Agreement 1	Sands Decker Ltd.	CM	\$20,000.00	
Company Name Agreement 1	Sands Decker Ltd.	CM	\$20,000.00	
Miles-McClellan Construction Ag...	OAKS Plumbing	CM	\$20,000.00	

Total: 35



PS (Consultant) Amendment Agency Consultant Coordinator

- Fill out the General section (All Items with a red * are required)
- To enter the Contract Reference, click Select button and choose the appropriate contract
- Complete Summary field information to ensure the Custom Print provides all necessary details

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1006/5174?__uref=uuu778465770t2

Create New Professional Services Amendments

Send Save

General Amendment Details

This work flow creates a consultant list amendment which adds value to the agreement. Release the Reservation for this Consultant once the Amendment record is Submitted. Complete the form entering the amounts agreed to. On the lower form, enter or import the work breakdown specified in the amendment. 'Save' the record and then use File --> Print Preview--> Custom to create a custom print of the amendment document.

Attachments Cc

Information
No Attachments.

General

Organization Department of Administrative Services	Record Number
Project Number OCI-080001	Creator Matthew Weber
Project Name OAKS CI Training 1	Creation Date
Project Location Surface Road	Status
Title * LACL Amendment 1	Professional Services Provider Sands Decker Ltd.
Contract Reference * Consultant List Agreement 19.12	EDGE Certified? No
Agreement Type Design	Fee Title SAO Standard Fee 1
Other Description	Contracting Authority Date
Amendment No. * 041	Amount (\$) * 10,000.00
Contract Amount Before Amendment (\$) * 50,000.00	Line Item Total (\$) 0.00
Contract Amount After Amendment(\$)* 60,000.00	Difference (\$) 10,000.00



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

- Scroll down form
- Complete all fields
- Click the **Amendment Details** tab

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1006/5174?__uref=uuu778465770t2

Create New Professional Services Amendments

Send Save

General Amendment Details

What is the EFFECT of the Amendment on the Project

What

See Attached

Notes

See Attached

NOTE: If the consultant list used in the original selection has expired, update the selection method to contain the current consultant list. If this vendor was not included in the current consultant list you may not use the consultant list selection method.

Selection Method * OFCC Architect/Engineer FY 20-21

Reimbursement Required? No

Controlling Board

Controlling Board Approved? * Yes

Controlling Board Number 1234112

Controlling Board Date 10/06/2020

Attachments Cc

Information No Attachments.



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

- a) To add Line Items click **Add**
- b) If you are referencing a current line in your agreement click the select button next to Reference
- c) Highlight a Line Item and click **Select**
- d) Fill out the Amount field
- e) Click **Save & Add New** to add another line, otherwise click **Save**

The screenshot displays the 'Create New Professional Services Amendments' web application. The main form is titled 'Create New Professional Services Amendments' and has tabs for 'General' and 'Amendment Details'. The 'Amendment Details' tab is active, showing fields for Reference (2), WBS Code (AE-AS-TI), Code Name (AE Tests and Inspections), Short Description (Tests and Inspections), Professional Services EDGE Certified? (No), Amount (\$) (5,000.00), Subcontractor/Supplier, and EDGE Certified?. A table at the bottom shows 'Total Amount' as 0.00 and 'Total: 0'. A 'Commit Line Item Picker' dialog is open, showing a table of line items:

Item #	Ref	Description	CBS Code
000010	1	Pre Design	AE-BS-CD
000020	2	Tests and Inspections	AE-AS-TI
000030	3	Additional	AE-BS-PD
000040	4	Change Order Allowance	OR-CF-AE

The dialog also shows 'Total: 4' and buttons for 'Cancel' and 'Select'. Red circles and arrows labeled a through e point to the 'Add' button, the select button next to Reference, a line item in the picker, the Amount field, and the 'Save & Add New' button.



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

- If you are creating a new Line Item, click the button next to WBS Code
- Click the **Collapse** button
- Choose CBS code and click **Select**
- Fill out required fields marked with a red *
- Click **Save & Add New** to add another line, otherwise click **Save**

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?_uref=uuu13127755t1

Create New Professional Services Amendments Send Save

General **Amendment Details**

Add Actions

No.	Refer...	WBS Code	Code

Line Item Details

General

Reference
Type a Reference No...

WBS Code *
AE-AS-TI

Code Name
AE Tests and Inspections

Short Description *
Inspection

Professional Services EDGE Certified?
No

Amount (\$) *
5,000.00

Subcontractor/Supplier
Type a Subcontractor/Supplier...

EDGE Certified?

Total Amount: 0.00
Total: 0

Cancel Save **Save & Add New**

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?_uref=uuu13127755t1

CBS Picker

Search Collapse

CBS Code	CBS Name
AE-AS-EN	AE Environmental Survey
AE-AS-GT	AE Geotechnical Investigation
AE-AS-HM	AE Hazardous Materials Survey
AE-AS-LD	AE LEED Documentation Services
AE-AS-MV	AE Measurement and Verification
AE-AS-OT	AE Other Additional Services
AE-AS-PF	AE Partnering Facilitation
AE-AS-PR	AE Program of Requirements
AE-AS-SU	AE Site Surveying Services
AE-AS-TI	AE Tests and Inspections
AE-AS-WS	AE Warranty Services
AE-RE-00	AE Reimbursable Expense
RF-00-00	Regulatory Fees Summary

Total: 343

Cancel **Select**



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

- f) Saved Line Items will display
- g) When all lines have been added, note the **Total Amount**
- h) Click the General tab

The screenshot shows a web browser window with the URL `ohio-university.com/bp/mod/bp/record/new/upsa2/1003/266?_uref=uuu131277555t1`. The page title is "Create New Professional Services Amendments - Project No. OCI-080001". The main heading is "Create New Professional Services Amendments". There are two tabs: "General" (highlighted with a red circle and callout 'h') and "Amendment Details". Below the tabs is a toolbar with "Add", "Actions", and other icons. A table displays one line item:

No.	Refer...	WBS Code	Code Name
001	2	AE-AS-TI	AE Tests and Inspections

Below the table, the "Total Amount" is displayed as 5,000.00 (highlighted with a red box and callout 'g'). The right-hand panel shows the "Line Item Details" for the selected item, with the "General" tab selected. The "General" tab contains fields for Reference (2), WBS Code (AE-AS-TI), Code Name (AE Tests and Inspections), and Short Description (Tests and Inspections). A "Save" button is visible at the bottom of the panel.



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

Once record is complete:

- a) Click **Save**
- b) Click the menu button
- c) **Print --> Custom**

The screenshot displays a web application interface for 'Professional Services Amendments'. The browser title is 'Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2609977/undefined/undefined?__uref=un1805413...'. The page title is 'Professional Services Amendments'. There are three tabs: 'General', 'Amendment Details', and 'Purchase Order'. The 'General' tab is active. The main content area shows a form with the following fields:

Organization	Record Number
OAKS CI Test	Amend-0008
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	04/28/2020 12:20 PM (UTC-5)
Project Location	Status
OAKS CI Administration	Pending
Amendment No.	Fee Title
080001-2	OFCC Standard Fee
Title	Amendment Execution Date
Amendment 080001-2	
Contract Reference	Professional Services Provider
OCI General 080001-02	OCI Test General
Agreement Type	EDGE Certified?
Design	No

Annotations on the screenshot:

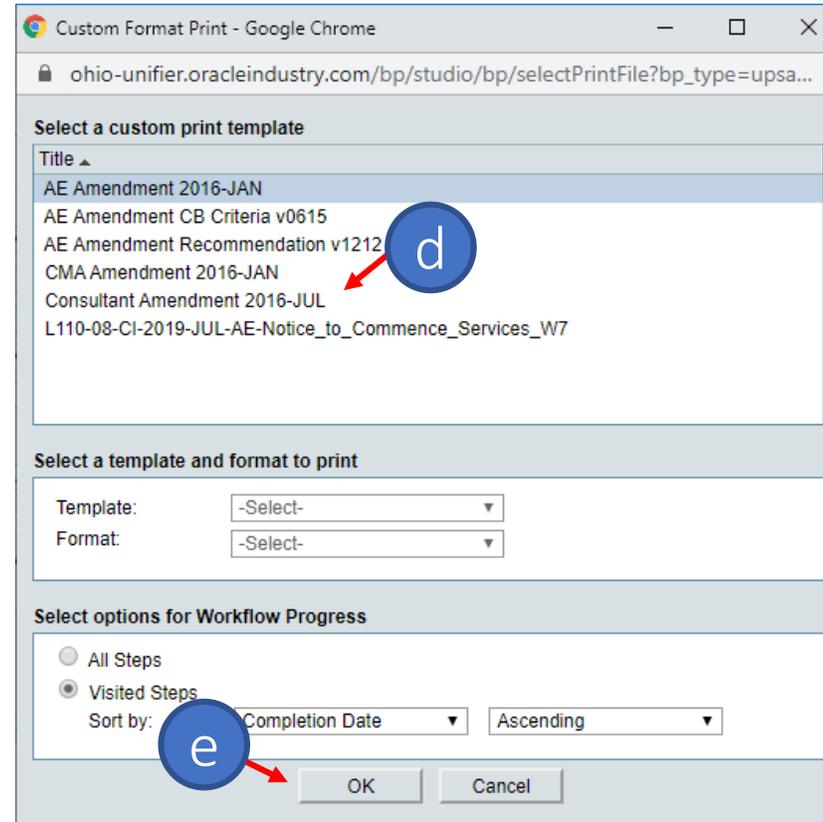
- a**: Points to the 'Save' button in the top right corner.
- b**: Points to the menu button (three horizontal lines) next to the 'Save' button.
- c**: Points to the 'Custom ...' option in the dropdown menu that appears after clicking the menu button.

The dropdown menu includes the following options: SOV, Export Line Item Template, Print, Reload, Review, Terminate Record, Transfer Ownership..., Undo Accept Task, Help, and Close. The 'Print' option is expanded, showing 'HTML ...', 'PDF ...', and 'Custom ...'.



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

- d) Select: Consultant Amendment
- e) Click : **OK**



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

- f) Double click on the document
- g) Click Enable Editing and update any necessary fields

***Once complete
Save the document
to your computer***

The screenshot displays a web application interface for 'Professional Services Amendments'. The 'General' tab is active, showing fields for Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Amendment No. (080001-2), and Title (Amendment 080001-2). A red arrow points to a file icon in the bottom left corner of the application window.

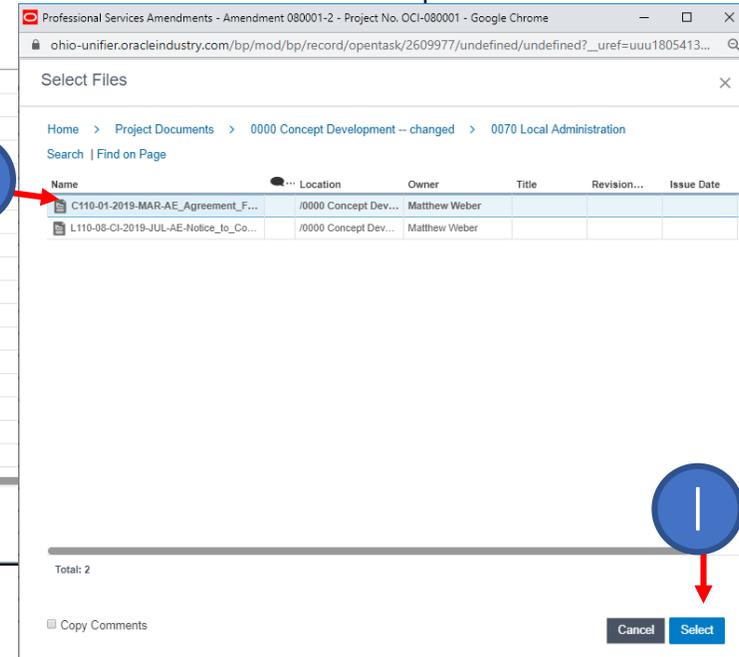
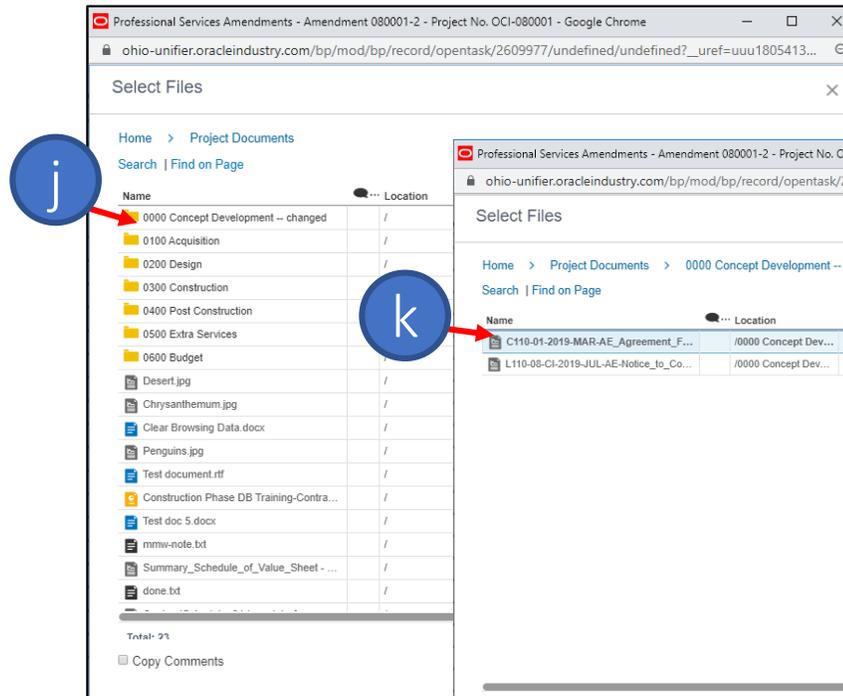
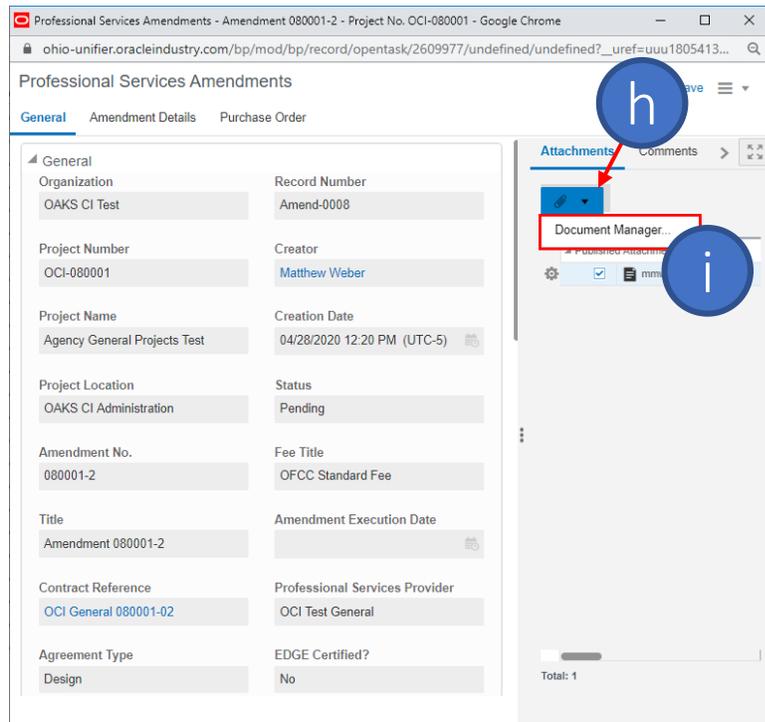
Overlaid on the application is a Microsoft Word document titled 'Consultant Amendment Form'. The document content includes:
Amendment #
The original Consultant Agreement Form ("Agreement") executed on «insert original agreement date» of Ohio, acting by and through the Ohio Facilities Construction Commission, and ("Consultant"), as amended amendments if any, is hereby amended for the following Project:
Project Number: «insert number»
Project Name: «insert name»
Site Address: «insert street address»
«insert city, county»
The scope of services for the Agreement, in accordance with Exhibit B, is amended as follows:
Page 1 of 2 240 words 100%

Annotations on the Word document include a red arrow pointing to the 'Enable Editing' button in the 'PROTECTED VIEW' warning bar, and a blue circle with a white 'f' icon pointing to the 'Contract Reference' field in the web application.



PS (Consultant) Amendment

- h) Click the attachments button in the Attachments tab
- i) Choose Document Manger
- j) Navigate Document Manager to find your file
- k) Highlight the appropriate file
- l) Click Select



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

The screen will close:

- ▶ Your attachment will display under the Attachments tab
- ▶ When the record is ready to move forward, click the **Send** button

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2609977/undefined/undefined?_uref=uuu18054130t1#`. The page title is "Professional Services Amendments". In the top right corner, there are buttons for "Send" and "Save", with a red circle around the "Send" button and a red arrow pointing to it. Below the navigation tabs, the "General" tab is active, displaying a form with the following fields:

Organization	Record Number
OAKS CI Test	Amend-0008
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	04/28/2020 12:20 PM (UTC-5)
Project Location	Status
OAKS CI Administration	Pending
Amendment No.	Fee Title
080001-2	OFCC Standard Fee
Title	Amendment Execution Date
Amendment 080001-2	
Contract Reference	Professional Services Provider
OCI General 080001-02	OCI Test General
Agreement Type	EDGE Certified?

The "Attachments" tab is also visible on the right side of the screen, showing a list of published attachments. One attachment, "C110-01-2019-MAR-AE...", is highlighted with a red box. The "Total: 2" is displayed at the bottom of the attachments list.



PS (Consultant) Amendment Agency Consultant Coordinator (Create)

- ▶ Verify Workflow Action
- ▶ Click **Send**
- ▶ The record will move forward to PM for Amendment Proposal Review

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1006/5174?__uref=uuu778465770t2

Create Workflow Action Details

General

Action Details

Workflow Actions *
Submit

Send For
Amendment Review

To
Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant Student10; Consult...

CC
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Total: 1

Cancel Send

PS (Consultant) Amendment PM (Review and Controlling Board)

Project Manager will receive a notification from OAKS CI via email:

Click the link in the email or:

- Log into your project
- Click Tasks
- Double click the record to open

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'OAKS CI Admin', 'Company Work...', 'Projects', 'OAKS CI Traini...', 'Higher Ed', 'School Facilities', 'Organization Te...', and 'OAKS CI Ad'. The left sidebar shows a navigation menu with 'Tasks' highlighted. The main content area shows a 'Tasks' table with columns: Business Process, Record Number, Title, Record Due, From, and Sent for. A red arrow points to the 'Tasks' section in the sidebar and another red arrow points to the first record in the table.

Business Process	Record Number	Title	Record Due	From	Sent for
OAKS CI Training 1	Professional Ser...	agree-0036	Consultant List ...	Shauna Hooks, s...	Agreem



PS (Consultant) Amendment PM (Review and Controlling Board)

➤ Click **Accept**

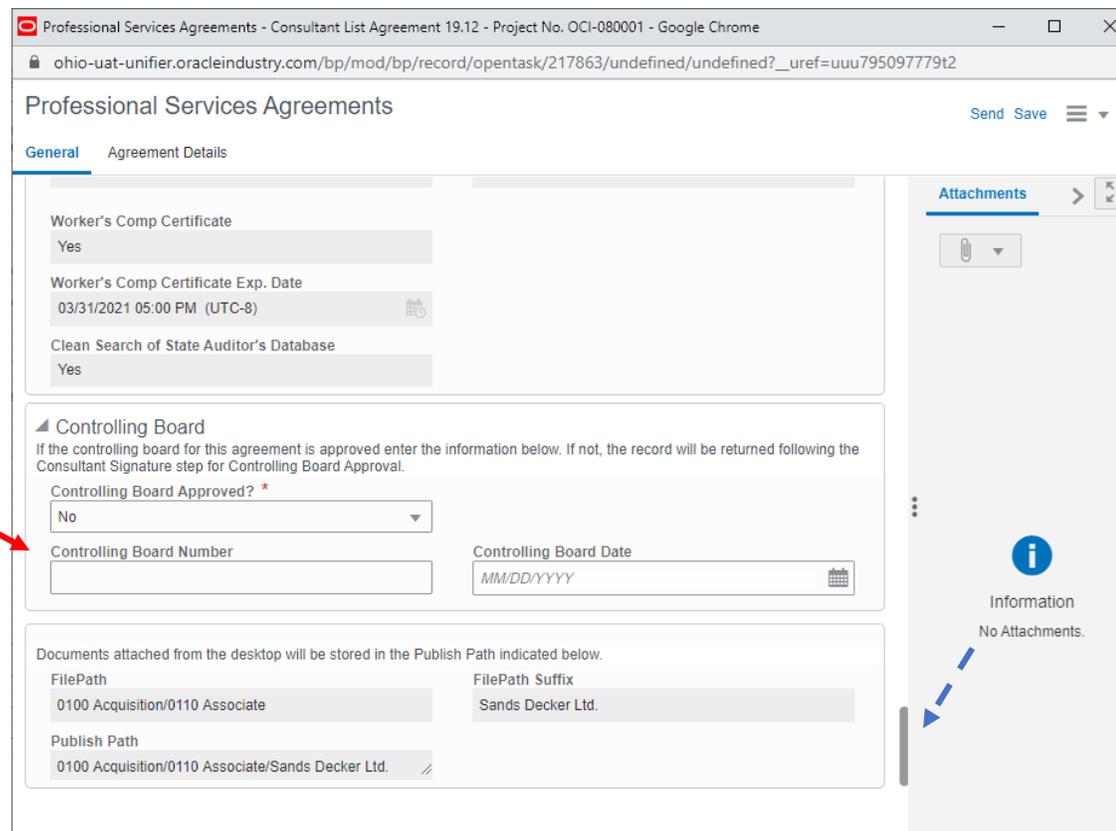
The screenshot shows a web browser window with the title 'Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218341?task_id=218341&parent_id=0&viewOnly=0&projec...'. The page title is 'Professional Services Amendments'. In the top right corner, there are buttons for 'Accept' and 'Decline', with a red arrow pointing to the 'Accept' button. Below the title, there are tabs for 'General', 'Amendment Details', and 'Purchase Order'. The 'General' tab is selected. The main content area is divided into two sections: 'Task Details' and 'General'. The 'Task Details' section shows 'From: Matthew Weber', 'To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant Student10; Consultant Stud...', and 'Sent For: Amendment Review'. The 'General' section shows a grid of fields: Organization (Department of Administrative Services), Record Number (Amend-0033), Project Number (OCI-080001), Creator (Matthew Weber), Project Name (OAKS CI Training 1), Creation Date (10/14/2020 03:08 AM (UTC-8)), Project Location (Surface Road), Status (Pending), Amendment No. (041), and Fee Title (SAO Standard Fee 1). On the right side, there is an 'Attachments' section with a vertical scrollbar and an information icon. Below the information icon, it says 'Information' and 'No Attachments.'.



PS (Consultant) Amendment (PM Review and Controlling Board (if necessary))*

- Review record and attachments
- Scroll down to:
Controlling Board
- If Controlling Board has been approved:
 - **Select Yes**
 - **Enter Controlling Board Number and Date**
- If Controlling Board has not been Approved:
 - **Select No**

** if you choose: No, the record will come back to you after the Consultant signature for Controlling board information*



Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217863/undefined/undefined?__uref=uuu795097779t2

Professional Services Agreements

Send Save

General Agreement Details

Worker's Comp Certificate
Yes

Worker's Comp Certificate Exp. Date
03/31/2021 05:00 PM (UTC-8)

Clean Search of State Auditor's Database
Yes

Controlling Board
If the controlling board for this agreement is approved enter the information below. If not, the record will be returned following the Consultant Signature step for Controlling Board Approval.

Controlling Board Approved? *
No

Controlling Board Number
Controlling Board Date
MM/DD/YYYY

Documents attached from the desktop will be stored in the Publish Path indicated below.

FilePath
0100 Acquisition/0110 Associate

FilePath Suffix
Sands Decker Ltd.

Publish Path
0100 Acquisition/0110 Associate/Sands Decker Ltd.

Attachments
No Attachments.



Professional Services (Consultant) Agreement PM (Review and Controlling Board) Submit to Consultant

- Click **Send** at the top of the record

➤ Choose workflow action:

If 'Accept Contract' workflow action is chosen, record will go to the Consultant for Signature

If 'Return for Clarification' workflow action is chosen, record will go back to ACC for update, please ensure that you add General Comments

➤ Click **Send**

The image displays three sequential screenshots of a web application interface for managing Professional Services Agreements. The first screenshot shows the main record page with a 'Send' button circled in red. The second screenshot shows the 'Workflow Action Details' dialog box with the 'Workflow Actions' dropdown menu open, highlighting 'Accept Contract' and 'Return for Clarification'. The third screenshot shows the 'Workflow Action Details' dialog box with 'Accept Contract' selected, and the 'Send' button circled in red.



Professional Services (Consultant) Amendment Consultant Signature

Consultant will receive a notification from OAKS CI via email:

Click the link in the email or:

- Log into your project
- Click Tasks
- Double click the record to open

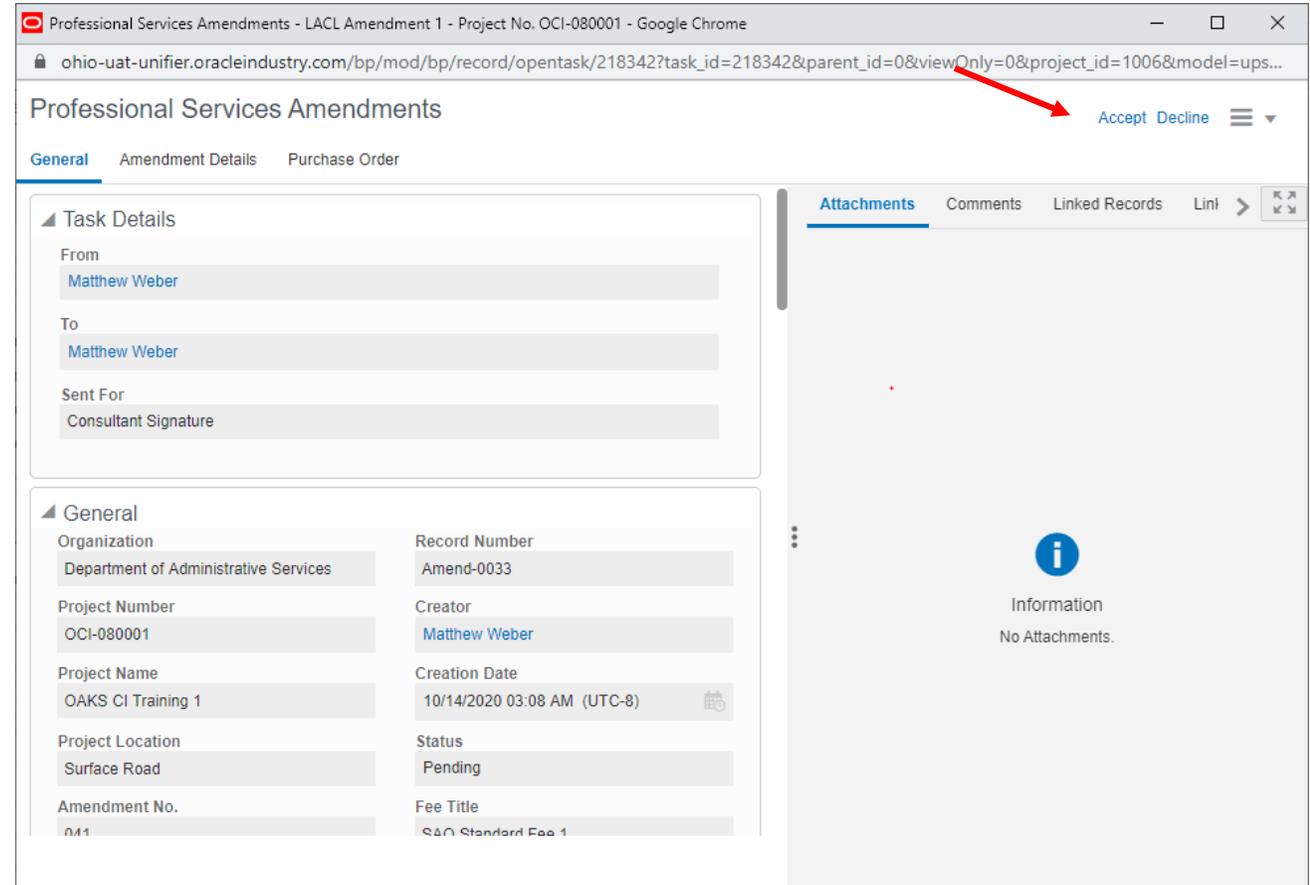
The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'OAKS CI Admin', 'Company Work...', 'Projects', 'OAKS CI Traini...', 'Higher Ed', 'School Facilities', 'Organization Te...', and 'OAKS CI Ad'. The left sidebar is expanded to show 'Tasks' under the 'Collaboration' section. The main content area displays a table of tasks with columns: Business Process, Record Number, Title, Record Due, From, and Sent for. A red arrow points to the 'Tasks' section in the sidebar and another red arrow points to the first task record in the table.

Business Process	Record Number	Title	Record Due	From	Sent for
OAKS CI Training 1	Professional Ser...	agree-0036	Consultant List ...	Shauna Hooks, s...	Agreem



PS (Consultant) Amendment Consultant Signature

➤ Click **Accept**



Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218342?task_id=218342&parent_id=0&viewOnly=0&project_id=1006&model=ups...

Professional Services Amendments

[Accept](#) [Decline](#) ☰

[General](#) [Amendment Details](#) [Purchase Order](#)

Task Details

From
Matthew Weber

To
Matthew Weber

Sent For
Consultant Signature

General

Organization Department of Administrative Services	Record Number Amend-0033
Project Number OCI-080001	Creator Matthew Weber
Project Name OAKS CI Training 1	Creation Date 10/14/2020 03:08 AM (UTC-8)
Project Location Surface Road	Status Pending
Amendment No. 041	Fee Title S&O Standard Fee 1

Attachments

Comments Linked Records Link >

i
Information
No Attachments.



PS (Consultant) Amendment Consultant Signature (Attach Documents)

- Open document in attachments tab
- Print and sign the attached agreement, scan copy of signed agreement to your computer
- Attach signed agreement with the supporting documents

The screenshot shows a web browser window displaying a record for 'Professional Services Agreements'. The browser address bar shows the URL: ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217864/undefined/undefined?__uref=uuu795097779t2. The page title is 'Professional Services Agreements' and it has tabs for 'General', 'Agreement Details', and 'Purchase Order'. The 'Attachments' tab is highlighted with a red circle. Below the tabs, there is a text block: 'Review the attached Consultant List Agreement, backup documentation, and record details. If everything is correct print the Consultant Agreement Document, Sign it, Scan it, and use 'Add Attachment' to attach the signed copy to this record. Take the work flow action 'Agreement Signed.' If needed, you may take the workflow action 'Return for Clarification' to return it to the creator for corrections..'. Below this is a 'General' section with a table of fields:

General	
Organization	Record Number
Department of Administrative Services	agree-0035
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	10/13/2020 07:45 AM (UTC-8)
Project Location	Status
Surface Road	Pending
Title	Fee Title
Consultant List Agreement 19.12	SAO Standard Fee 1
Selection Method	EDGE Waiver
OFCC Architect/Engineer FY 20-21	Yes
Delivery Method	EDGE Goal Percent
Consulting Only	
Total Project Cost \$	

On the right side, there is an 'Attachments' panel with a search bar and a list of attachments. The 'Attachments' tab is circled in red. Below it, there is a section for 'Unpublished Attachments' with a table:

Name
Consultant_Agreement.

A red arrow points from the 'Attachments' tab to the 'Unpublished Attachments' section. At the bottom right of the attachments panel, it says 'Total: 1'.



PS (Consultant) Amendment Consultant Signature (Attach Documents)

- 1) Under the **Attachments** tab on the right side of the record, click the attachments button
- 2) Choose **Browse**
- 3) Navigate to the folder where the document is stored; select the document you wish to attach
- 4) Click **Select**

The screenshot illustrates the process of attaching a document to a record in a web application. The main window shows the 'Attachments' tab with a 'Browse...' button highlighted. A secondary window shows a file selection dialog with a table of files, and the 'Select' button is highlighted.

Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217864/undefined/undefined?_uref=uuu79509777912

Professional Services Agreements

General Agreement Details Purchase Order

Review the attached Consultant List Agreement, backup documentation, and record details. If everything is correct print the Consultant Agreement Document, Sign it, Scan it, and use 'Add Attachment' to attach the signed copy to this record. Take the work flow action 'Agreement Signed.' If needed, you may take the workflow action 'Return for Clarification' to return it to the creator for corrections..

1

Attachments Comments

Browse... Document Manager...

Consultant_Agreement_... Signed Consultant_Agre...

2

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?_uref=uuu14416602011#

Select Files

Home > Project Documents > 0000 Concept Development -- changed > 0070 Local Administration

Search | Find on Page

Name	Location	Owner	Title	Revision...	Issue Date	Size
C110-01-2019-MAR-AE_Agreement_F...	/0000 Concept Dev...	Matthew Weber				431 KB
L110-08-CI-2019-JUL-AE-Notice_to_Co	/0000 Concept Dev...	Matthew Weber				363 KB

3

Total: 2

Copy Comments

Cancel **Select**

4



Professional Services (Consultant) Agreement Project Coordinator (DocuSign Initiation)

The Document Manager screen will close:

The added attachment(s) will be updated and display under the Attachments tab

- ▶ When the record is ready to move forward, click **Send**

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?_uref=uuu144166020t1#

Create New Professional Services Agreements ➔ Send Save

General Agreement Details

General

Organization: OAKS CI Test

Record Number: [Empty]

Project Number: OCI-080001

Creator: Matthew Weber

Project Name: Agency General Projects Test

Creation Date: [Empty]

Project Location: OAKS CI Administration

Status: [Empty]

Title *: OCI General 080001-02

Fee Title: OFCC Standard Fee

EDGE Waiver: Select

EDGE Goal Percent: 0

EDGE Commitment (%): 0

Attachments | Comments | Linked Records | Linked

Published Attachments

Name	Title
C110-01-2019-MAR-AE...	

Total: 1



PS (Consultant) Amendment Consultant Signature

Choose Workflow
Action:

If you choose 'Amendment Signed' the record will go To OFCC Consultant Contract Manager for Contract Assignment Number'

If you choose 'Return for Clarification' record will go back to ACC for Update

➤ Click Send

The image displays two screenshots of a web application interface for 'Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001'. The top screenshot shows the 'Workflow Action Details' dialog box with the 'Workflow Actions' dropdown menu open, highlighting the 'Amendment Signed' option. The bottom screenshot shows the same dialog box with the 'Send For' field populated with 'Contract Number Assignment' and the 'Send' button highlighted with a red circle. The 'Task Due Date' field is empty and has a message 'Task Due Date is not available' below it.

PS (Consultant) Amendment OFCC (Contract Number Assignment)

Consultant Contract Manager will receive a notification from OAKS CI via email:

Click the link in the email or:

- Log into your project
- Click Tasks
- Double click the record to open

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes tabs for 'OAKS CI Admin', 'Company Work...', 'Projects', 'OAKS CI Traini...', 'Higher Ed', 'School Facilities', 'Organization Te...', and 'OAKS CI A...'. The main content area is titled 'Tasks' and shows a list of tasks. A red arrow points to the first task record in the list.

Origin	Business Process	Record Number	Title	Record Due	From	Sent for
OAKS CI Training 1	Professional Ser...	agree-0037	Consultant List ...		Shauna Hooks, s...	Contrac

Total: 1



PS (Consultant) Amendment OFCC Contract Number Assignment

➤ Click **Accept**

The screenshot shows a web browser window with the following details:

- Browser Tab: Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001 - Google Chrome
- URL: ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218351?task_id=218351&parent_id=0&viewOnly=0&project_id=1006...
- Page Title: Professional Services Amendments
- Navigation: Accept Decline (with a red arrow pointing to 'Accept'), and a menu icon.
- Tabs: General (selected), Amendment Details, Purchase Order
- Task Details Section:
 - From: Matthew Weber
 - To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Matthew Weber; Moenique Morris; Purna Irukulapati; Rit...
 - Sent For: Contract Number Assignment
- General Section (Key-Value Pairs):

Organization	Department of Administrative Services	Record Number	Amend-0033
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	10/14/2020 03:08 AM (UTC-8)
Project Location	Surface Road	Status	Accepted
Amendment No.	041	Fee Title	SAO Standard Fee 1
- Attachments Section: Information icon, No Attachments.



PS (Consultant) Amendment OFCC Contract Number Assignment

Check the following on
the **General** tab:

- Review the Amendment document, backup documentation and record information. If everything is correct issue a Contract Number in FIN to be used by the agency for PO approval and set the maximum contract amount.

The screenshot displays the 'Professional Services Amendments' web application interface. The browser title is 'Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218351/undefined/undefined?_uref=uuu778465770t2'. The page title is 'Professional Services Amendments' with 'Send Save' and a menu icon. The 'General' tab is selected and circled in red. Below it, a 'Comment:' field is visible, with the 'Attachments' link also circled in red. The main content area is titled 'General' and contains a form with the following fields:

Organization	Record Number
Department of Administrative Services	Amend-0033
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	10/14/2020 03:08 AM (UTC-8)
Project Location	Status
Surface Road	Accepted
Title	
LACL Amendment 1	
Contract Reference	Professional Services Provider
Consultant List Agreement 19.12	Sands Decker Ltd.
Agreement Type	EDGE Certified?
Design	No
Other Description	Fee Title
	SAO Standard Fee 1
Amendment No.	Contracting Authority Date
041	
	Amount (\$)
	10,000.00
Contract Amount Before Amendment (\$)	Line Item Total (\$)
50,000.00	10,000.00
Contract Amount After Amendment(\$)	Difference (\$)
60,000.00	0.00

On the right side, the 'Attachments' section shows a table of unpublished attachments:

Name
Unpublished Attachments
<input checked="" type="checkbox"/> L 110-08-CI-2019-J
<input checked="" type="checkbox"/> Signed Consultant
<input checked="" type="checkbox"/> Signed Consultant

At the bottom right, there is a 'Total: 3' indicator.



PS (Consultant) Amendment OFCC Contract Number Assignment

- Complete **Releases** section
- Click **Send**

Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218351/undefined/undefined?_uref=uuu778465770t2

Professional Services Amendments

General Amendment Details

Controlling Board

Controlling Board Approved?
Yes

Controlling Board Number: 1234112 Controlling Board Date: 10/06/2020

OAKS Contract No. (Bid No.) *: 12345 **DAS Release and Permit**

Maximum Contract Amount *: 10,000.00 **Release & Permit Amount**: 10,000.00

Summary of Additional Services/Reimbursables

Summary

Attachments

Comment: >

Name
Unpublished Attachments
<input checked="" type="checkbox"/> L110-08-CI-2019-J
<input checked="" type="checkbox"/> Signed Consultant
<input checked="" type="checkbox"/> Signed Consultant

Total: 3



PS (Consultant) Amendment OFCC Contract Number Assignment

- Choose Workflow Action:

If you choose 'Contract Number issued', record will go to the Agency Owner Financial for Funding Certification

If you choose 'Return for Clarification', record will go back to ACC for update

- Click **Send**

The image displays two screenshots of the Oracle BPM Workflow Action Details dialog box. The top screenshot shows the 'Workflow Actions' dropdown menu open, with 'Contract Number Issue' selected. The bottom screenshot shows the 'Send For' field set to 'Funding Certification' and the 'Send' button highlighted.

Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001 - Google C...

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218351/undefined/undefined?_...

Workflow Action Details

Action Details

Workflow Actions *

Select

Select

Contract Number Issue

Return for Clarification

Send For

Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001 - Google C...

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218351/undefined/undefined?_...

Workflow Action Details

Action Details

Workflow Actions *

Contract Number Issue

Send For

Funding Certification

To

Archana Atrey;Brett Gundlach;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consult...

CC

Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel

Send



PS (Consultant) Amendment Owner Financial (Funding Certification)

Owner Financial will receive a notification from OAKS CI via email:

Click the link in the email *or*

- Log into your project
- Click Tasks
- Double click the record to open

The screenshot shows the Primavera Unifier web application interface. The browser address bar indicates the URL is https://ohio-stage-unifier.oracleindustry.com/bp/route/11/i-project_tasks?_uref=uuu524957078#. The page title is "ORACLE Primavera Unifier (Development)". The left sidebar contains a navigation menu with "Tasks" highlighted. A red arrow points to the "Tasks" menu item. The main content area displays a "Tasks" section with a table of records. The table has columns: Origin, Business Process, Record Number, Title, Record Due, From, and Sent for. One record is visible: OAKS CI Training 1, Professional Ser..., agree-0037, Consultant List..., Shauna Hooks, s..., and Contrac. The total count at the bottom is 1.



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

➤ Click: **Accept**

Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217958?task_id=217958&parent_id=0&viewOnly=0&project_id=4006&model=upsa1&_uref=uuu...

Professional Services Agreements

Accept Decline

General Agreement Details

Task Details

From: Matthew Weber

To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant Student10; Consultant S...

Sent For: Funding Certification

General

Organization: Department of Administrative Services	Record Number: agree-0035
Project Number: OCI-080001	Creator: Matthew Weber
Project Name: OAKS CI Training 1	Creation Date: 10/13/2020 07:45 AM (UTC-8)
Project Location: Surface Road	Status: Accepted
Title: Consultant List Agreement 19.12	Fee Title: SAO Standard Fee 1

Attachments

Name	Title
Consultant_Agreement_...	
Signed Consultant_Agre...	

Total: 2



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

- Review record
- Create the Purchase Order in OAKS FIN or your financial system of record

Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217958/undefined/undefined?__uref=uuu724998076t2

Professional Services Agreements

Send Save

General Agreement Details Purchase Order

Obtain funding for the attached Consultant List Agreement document. The Contract Number assigned is available in the Releases block below. Enter the PO information using the PO tab on the lower form, save it, and complete the Purchase Order Details block. Take the workflow action 'Funding Certified' to forward the record to the Contracting Authority for final execution.

General

Organization	Record Number
Department of Administrative Services	agree-0035
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	10/13/2020 07:45 AM (UTC-8)
Project Location	Status
Surface Road	Accepted
Title	Fee Title
Consultant List Agreement 19.12	SAO Standard Fee 1
Selection Method	
OFCC Architect/Engineer FY 20-21	
Delivery Method	EDGE Waiver
Consulting Only	Yes
Total Project Cost \$	EDGE Goal Percent

Attachments Comments Linked Records

Name
Published Attachments			
<input checked="" type="checkbox"/>	Consultant_Agreement...		
<input checked="" type="checkbox"/>	Signed Consultant_Agre...		

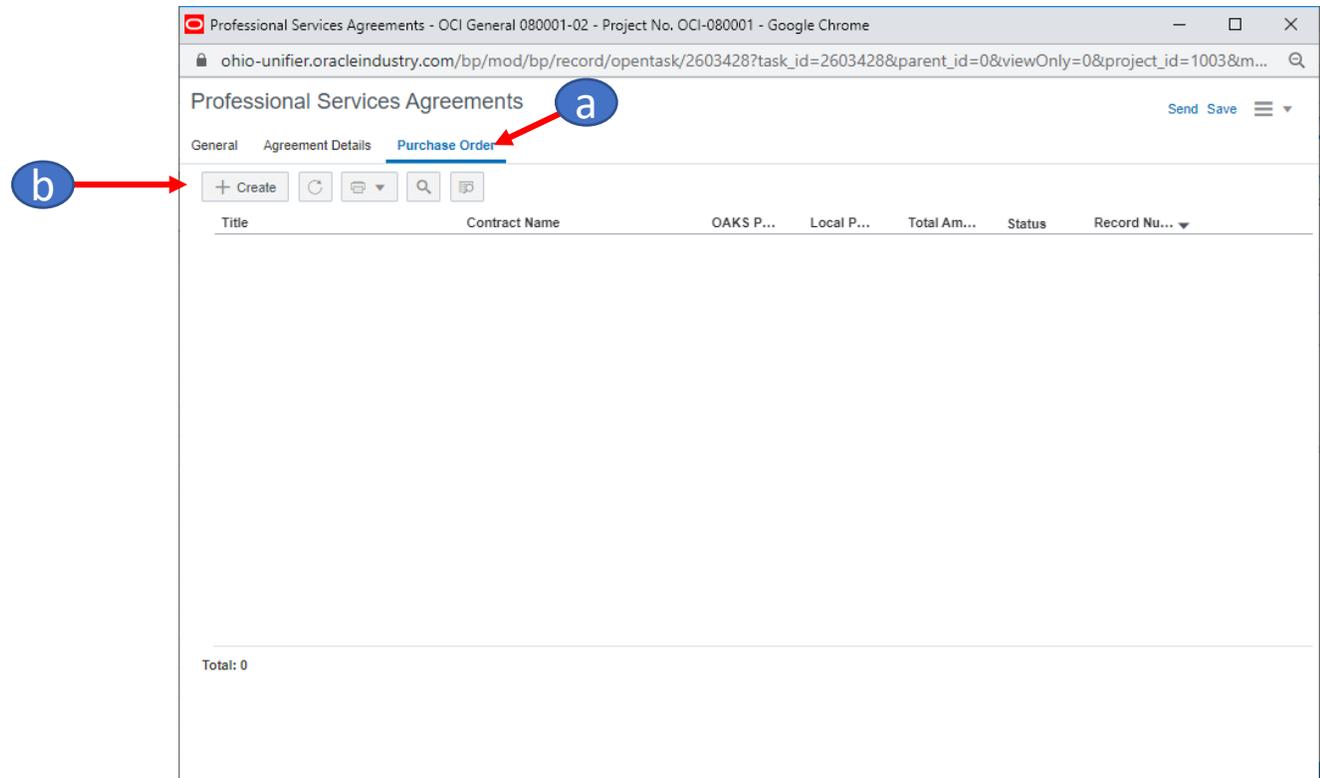
Total: 2



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

▶ **Record the Purchase Order information in this record:**

- a. Open the Purchase Order tab
- b. Click Create



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

Record the Purchase Order in this record:

- c. Complete the General block, scrolling down to all required fields
- d. In PO Type section, **Keep OAKS PO Amount field empty**
- e. Click PO Distribution Lines tab to add Fund Codes

Create New Purchase Orders - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1003/0/1/gen_ps_agreement_name_bp/32...

Create New Purchase Orders Submit Save

General PO Distribution Lines e

General

Organization: OAKS CI Test

Record Number: [Empty]

Project Number: OCI-080001

Creator: Matthew Weber

Project Name: Agency General Projects Test

Creation Date: [Empty]

Project Location: OAKS CI Administration

Status: Select

Title: Matt's Consulting OCI-00081_PR1

PO Purpose: Select

Vendor: Type a Vendor Name...

Financial System of Record: Select

Change Status: Select

Create New Purchase Orders Submit Save

General PO Distribution Lines

PO Details
The OAKS PO No should be a 10 digit number ex. 0000007825

OAKS PO No. [Empty] OAKS PO Amount (\$) 0.00

OAKS PO Date: MM/DD/YYYY HH:MM AM

Date Dispatched: MM/DD/YYYY HH:MM AM

Created by Integration: Select

Local PO No. [Empty] Local PO Amount (\$) 0.00

Local PO Date: MM/DD/YYYY HH:MM AM

Date Dispatched: MM/DD/YYYY HH:MM AM

d



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

Complete Record:

- h. Click General tab
View upper form
- i. Enter the OAKS PO Amount
- j. Click Submit Editing

The screenshot shows a web browser window titled "Create New Purchase Orders - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1/gen_ps_agreement_n...". The page title is "Create New Purchase Orders". There are two tabs: "General" (selected) and "PO Distribution Lines". In the top right corner, there are buttons for "Submit" and "Save".

Annotation 'h' points to the "General" tab. Annotation 'i' points to the "OAKS PO Amount (\$)" field, which contains the value "176,000.00". Annotation 'j' points to the "Submit" button.

The form content includes:

- PO Details**
The OAKS PO No. should be a 10 digit number ex. 0000007825
- OAKS PO No.** (empty text input)
- OAKS PO Amount (\$)** (text input with value "176,000.00")
- OAKS PO Date** (date-time picker with value "MM/DD/YYYY HH:MM AM")
- Date Dispatched** (date-time picker with value "MM/DD/YYYY HH:MM AM")
- Created by Integration** (dropdown menu with value "Select")
- Local PO No.** (empty text input)
- Local PO Amount (\$)** (text input with value "0.00")
- Local PO Date** (empty text input)



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

Complete Record:

- When the record is ready to move forward, click **Send**

Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217958/undefined/undefined?_uref=uuu72499...

Professional Services Agreements

Send Save

General Agreement Details Purchase Order

Obtain funding for the attached Consultant List Agreement document. The Contract Number assigned is available in the Releases block below. Enter the PO information using the PO tab on the lower form, save it, and complete the Purchase Order Details block. Take the workflow action 'Funding Certified' to forward the record to the Contracting Authority for final execution.

General

Organization	Record Number
Department of Administrative Services	agree-0035
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	10/13/2020 07:45 AM (UTC-8)
Project Location	Status
Surface Road	Accepted
Title	Fee Title
Consultant List Agreement 19.12	SAO Standard Fee 1
Selection Method	

Attachments

Name
Published Attachments
Consultant List Agreement 19.12
Signed Consultant List Agreement 19.12

Total: 2



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

- Choose:
Workflow Action
- ***If you choose 'Funding Certified', record will go to Contracting Authority for Signature***
- ***If you choose 'Return for Clarification', record will be returned to ACC for update***
- Click Send

The image displays two screenshots of the Oracle Workflow Action Details form. The top screenshot shows the 'Workflow Actions' dropdown menu open, with 'Funding Certified' selected. A red arrow points to the dropdown menu. The bottom screenshot shows the 'Send For' field set to 'Contracting Authority Signature' and the 'Send' button highlighted. A red arrow points to the 'Send' button. The form also shows the 'To' field with email addresses and the 'CC' field with a search prompt. The 'Due Date Details' section shows a message: 'Task Due Date is not available'.



Professional Services (Consultant) Agreement Contracting Authority (Signature)

Contracting Authority
will receive a
notification from
OAKS CI via email:

Click the link in the
email or :

- Log into your project
- Click Tasks
- Double click the record to open

The screenshot displays the Primavera Unifier web application interface. The browser address bar shows the URL: https://ohio-stage-unifier.oracleindustry.com/bp/route/11/i-project_tasks?_uref=uuu524957078#. The application header includes the Oracle Primavera Unifier logo and navigation tabs for OAKS CI Admin, Company Work..., Projects, OAKS CI Train..., Higher Ed, School Facilities, Organization Te..., and OAKS CI Ar. The left sidebar menu is expanded to show the 'Tasks' section, with a red arrow pointing to the 'Tasks' item. The main content area displays a table of tasks with the following columns: Origin, Business Process, Record Number, Title, Record Due, From, and Sent for. A single record is visible, with a red arrow pointing to the 'OAKS CI Training 1' record. The record details are: Origin: OAKS CI Training 1, Business Process: Professional Ser..., Record Number: agree-0037, Title: Consultant List ..., Record Due: (blank), From: Shauna Hooks, s..., Sent for: (blank). The bottom of the screen shows 'Total: 1'.



Professional Services (Consultant) Agreement Contracting Authority (Signature)

- Click: **Accept**
- Print and sign the agreement, scan copy to your computer
- Attach signed agreement to record

Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218002?task_id=218002&parent_id=0&viewOnly=0&project_id=1006&model=upsa...

Professional Services Agreements

Accept Decline

General Agreement Details

Task Details

From: Matthew Weber

To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant Student10; Co...

Sent For: Contracting Authority Signature

General

Organization	Record Number
Department of Administrative Services	agree-0035
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	10/13/2020 07:45 AM (UTC-8)
Project Location	Status
Surface Road	Accepted
Title	Fee Title

Attachments

Name	Tit
Published Attachments	
<input checked="" type="checkbox"/> Consultant_Agrement...	
<input checked="" type="checkbox"/> Signed Consultant_Agre...	

Total: 2



Professional Services (Consultant) Agreement Contracting Authority (Signature)

Attach all necessary documents:

- 1) Under the **Attachments** tab on the right side of the record, click the attachments button
- 2) Choose **Browse**
- 3) Navigate to the folder where the document is stored; select the document you wish to attach
- 4) Click **Select**

The screenshot illustrates the process of attaching a document to a record in a web application. The main window shows the 'Attachments' tab with a 'Browse...' button highlighted. A secondary window shows a file selection dialog with a table of files, and the 'Select' button is highlighted.

Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217864/undefined/undefined?_uref=uuu79509777912

Professional Services Agreements

General Agreement Details Purchase Order

Review the attached Consultant List Agreement, backup documentation, and record details. If everything is correct print the Consultant Agreement Document, Sign it, Scan it, and use 'Add Attachment' to attach the signed copy to this record. Take the work flow action 'Agreement Signed.' If needed, you may take the workflow action 'Return for Clarification' to return it to the creator for corrections...

1

Attachments Comments

Browse... Document Manager...

2

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?_uref=uuu14416602011#

Select Files

Home > Project Documents > 0000 Concept Development -- changed > 0070 Local Administration

Search | Find on Page

Name	Location	Owner	Title	Revision...	Issue Date	Size
C110-01-2019-MAR-AE_Agreement_F...	/0000 Concept Dev...	Matthew Weber				431 KB
L110-08-CI-2019-JUL-AE-Notice_to_Co	/0000 Concept Dev...	Matthew Weber				363 KB

3

Total: 2

Copy Comments

Cancel **Select**

4



Professional Services (Consultant) Agreement Contracting Authority (Signature)

The Document Manager screen will close:

The added attachment(s) will be updated and display under the Attachments tab

- ▶ When the record is ready to move forward, click **Send**

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?_uref=uuu144166020t1#

Create New Professional Services Agreements ➔ Send Save

General Agreement Details

General

Organization: OAKS CI Test Record Number: []

Project Number: OCI-080001 Creator: Matthew Weber

Project Name: Agency General Projects Test Creation Date: []

Project Location: OAKS CI Administration Status: []

Title *: OCI General 080001-02 Fee Title: OFCC Standard Fee

EDGE Waiver: Select

EDGE Goal Percent: 0

EDGE Commitment (%): 0

Attachments Comments Linked Records Linked

Published Attachments

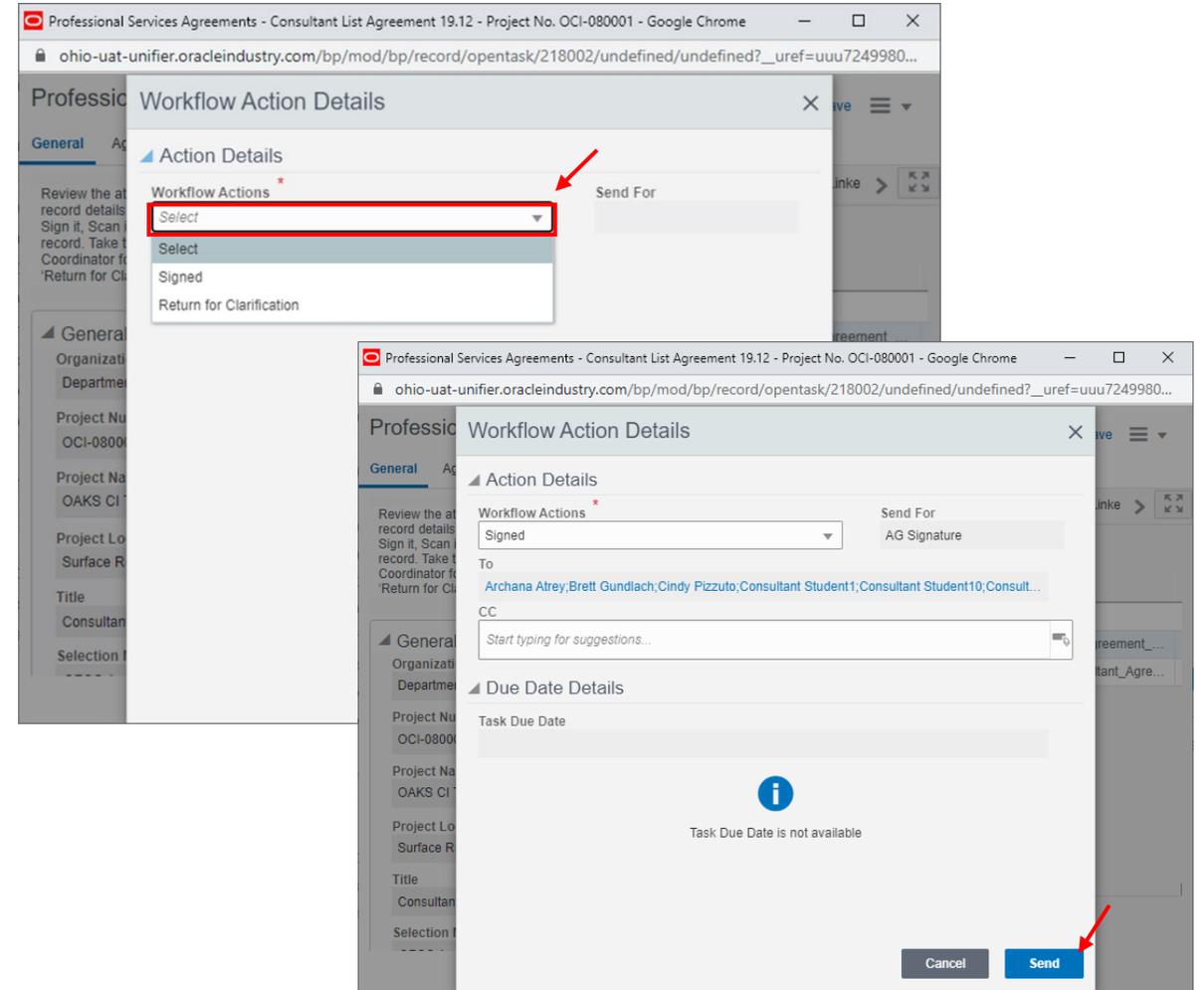
Name	Title
C110-01-2019-MAR-AE...	[]

Total: 1



Professional Services (Consultant) Agreement Contracting Authority (Submit to ACC for Document Load)

- Choose: Workflow Action
 - ***If you choose 'Signed' the record will go to the ACC for Document Load***
 - ***If you choose 'Return for Clarification' record will go back to ACC for Update***
- Click Send



Professional Services (Consultant) Agreement ACC (Final Document Load)

Agency Consultant
Coordinator will receive
a notification from
OAKS CI via email:

Click the link in the
email or

- Log into your project
- Click Tasks
- Double click the record to open

The screenshot displays the Primavera Unifier web application interface. The browser address bar shows the URL: https://ohio-stage-unifier.oracleindustry.com/bp/route/11/i-project_tasks?_uref=uuu524957078#. The application header includes the Oracle Primavera Unifier logo and navigation tabs for OAKS CI Admin, Company Work..., Projects, OAKS CI Training, Higher Ed, School Facilities, and Organization Te... The main content area shows a 'Tasks' section with a table of records. A red arrow points to the 'OAKS CI Training 1' record in the table.

Origin	Business Process	Record Number	Title	Record Due	From	Sent for
OAKS CI Training 1	Professional Ser...	agree-0037	Consultant List ...		Shauna Hooks, s...	Contrac



Professional Services (Consultant) Agreement ACC (Final Document Load)

Agency Consultant
Coordinator will receive
a notification from
OAKS CI via email:

Click the link in the
email or

- Log into your project
- Click Tasks
- Double click the record to open

The screenshot displays the Primavera Unifier web application interface. The browser address bar shows the URL: https://ohio-stage-unifier.oracleindustry.com/bp/route/11/i-project_tasks?_uref=uuu524957078#. The application header includes the Oracle Primavera Unifier logo and the text "(Development)". The navigation menu on the left lists various modules, with "Tasks" highlighted. The main content area shows a "Tasks" section with a table of records. A red arrow points to the "Tasks" menu item and another red arrow points to the first record in the table.

Origin	Business Process	Record Number	Title	Record Due	From	Sent for
OAKS CI Training 1	Professional Ser...	agree-0037	Consultant List ...		Shauna Hooks, s...	Contrac



Professional Services (Consultant) Agreement ACC (Final Document Load-Submit to Project Manager)

➤ Click: **Accept**

The screenshot shows a web browser window with the URL: `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218045?task_id=218045&parent_id=0&viewOnly=0&project_id=10008&model=upsa1&_uref=uuu...`. The page title is "Professional Services Agreements".

At the top right, there are links for "Accept" and "Decline", with a red arrow pointing to the "Accept" link. A menu icon is also present.

The main content area is divided into sections:

- Task Details:**
 - From: Matthew Weber
 - To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant Student10; Consultant S...
 - Sent For: AG Signature
- General:**
 - Organization: Department of Administrative Services
 - Record Number: agree-0035
 - Project Number: OCI-080001
 - Creator: Matthew Weber
 - Project Name: OAKS CI Training 1
 - Creation Date: 10/13/2020 07:45 AM (UTC-8)
 - Project Location: Surface Road
 - Status: Accepted
 - Title: Consultant List Agreement 19.12
 - Fee Title: SAO Standard Fee 1
- Attachments:** A table showing published attachments:

Name	Title
<input checked="" type="checkbox"/> Consultant_Agreement_...	
<input checked="" type="checkbox"/> Signed Consultant_Agre...	

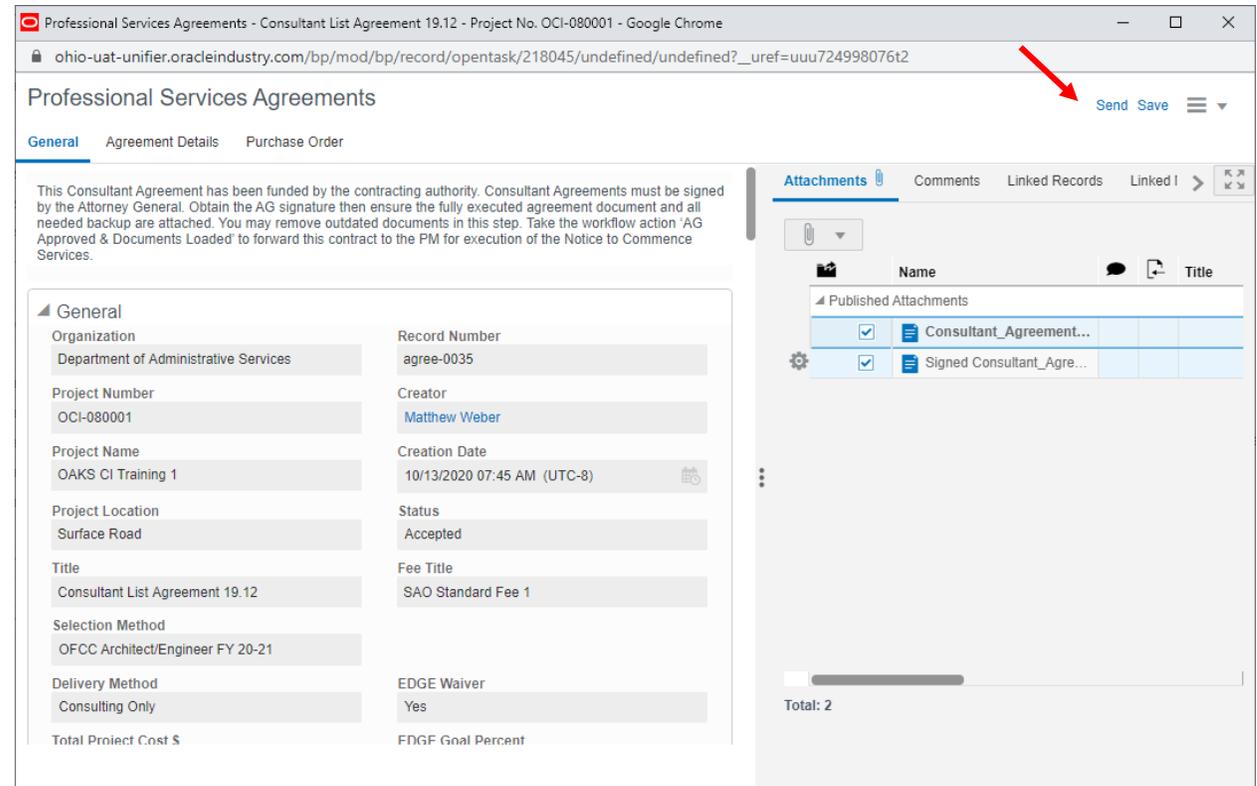
At the bottom right of the attachments section, it says "Total: 2".



Professional Services (Consultant) Agreement ACC (Final Document Load-Submit to Project Manager)

Review attached documents, ensure that all signatures have been acquired

➤ **Click Send**



Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218045/undefined/undefined?__uref=uuu724998076t2

Professional Services Agreements

General Agreement Details Purchase Order

This Consultant Agreement has been funded by the contracting authority. Consultant Agreements must be signed by the Attorney General. Obtain the AG signature then ensure the fully executed agreement document and all needed backup are attached. You may remove outdated documents in this step. Take the workflow action 'AG Approved & Documents Loaded' to forward this contract to the PM for execution of the Notice to Commence Services.

General

Organization	Record Number
Department of Administrative Services	agree-0035
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	10/13/2020 07:45 AM (UTC-8)
Project Location	Status
Surface Road	Accepted
Title	Fee Title
Consultant List Agreement 19.12	SAO Standard Fee 1
Selection Method	
OFCC Architect/Engineer FY 20-21	
Delivery Method	EDGE Waiver
Consulting Only	Yes
Total Project Cost \$	FDGF Goal Percent

Attachments

	Name	Title
<input checked="" type="checkbox"/>	Consultant_Agreement...	
<input checked="" type="checkbox"/>	Signed Consultant_Agre...	

Total: 2



Professional Services (Consultant) Agreement ACC (Final Document Load-Submit to Project Manager)

- Choose: Workflow Action
- ***If you choose 'AG Approved & Documents Loaded' The record will now go to the AE for "Notice to Commence Services"***
- Click **Send**

The image displays two screenshots of the Oracle BPM Workflow Action Details form. The top screenshot shows the 'Workflow Actions' dropdown menu open, with 'AG Approved & Documents Loaded' selected. The bottom screenshot shows the 'Send For' field populated with 'AE Notice to Proceed' and the 'Send' button highlighted.

Professional Services (Consultant) Agreement ACC (Final Document Load-Submit to Project Manager)

Review attached documents, ensure that all signatures have been acquired

➤ **Click Send**

Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218045/undefined/undefined?__uref=uuu724998076t2

Professional Services Agreements

General Agreement Details Purchase Order

This Consultant Agreement has been funded by the contracting authority. Consultant Agreements must be signed by the Attorney General. Obtain the AG signature then ensure the fully executed agreement document and all needed backup are attached. You may remove outdated documents in this step. Take the workflow action 'AG Approved & Documents Loaded' to forward this contract to the PM for execution of the Notice to Commence Services.

General

Organization	Record Number
Department of Administrative Services	agree-0035
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	10/13/2020 07:45 AM (UTC-8)
Project Location	Status
Surface Road	Accepted
Title	Fee Title
Consultant List Agreement 19.12	SAO Standard Fee 1
Selection Method	
OFCC Architect/Engineer FY 20-21	
Delivery Method	EDGE Waiver
Consulting Only	Yes
Total Project Cost \$	FDGF Goal Percent

Attachments Comments Linked Records Linked 1

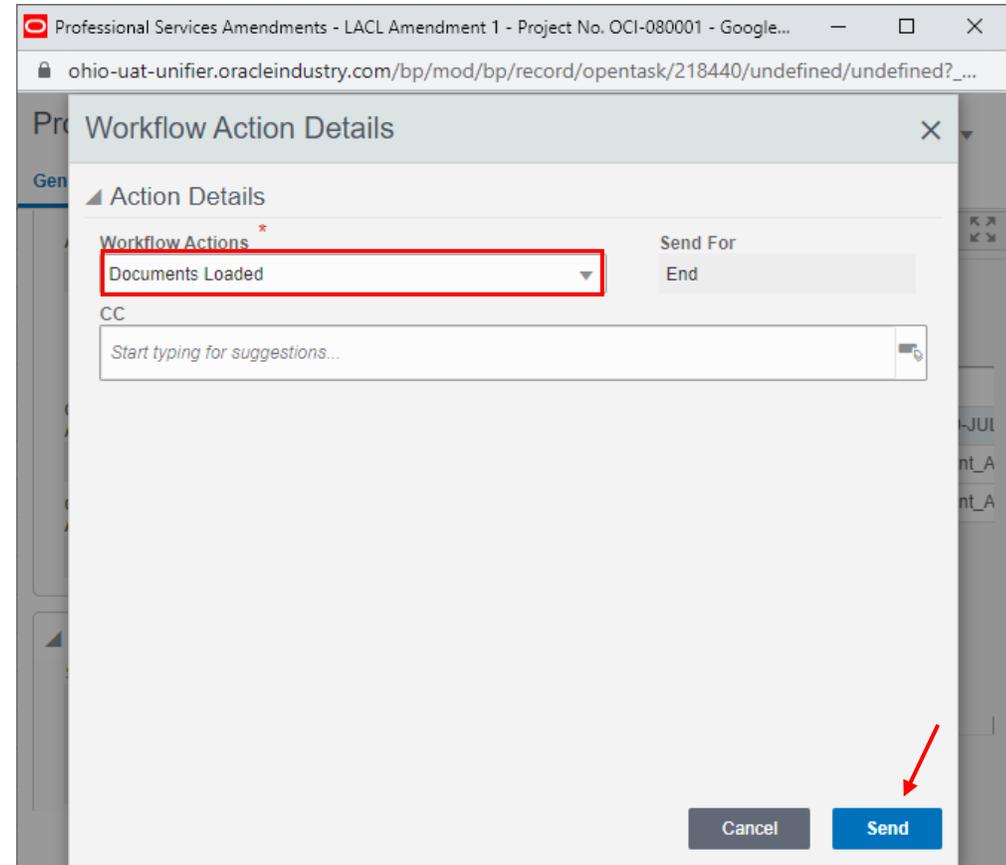
	Name	Title
<input checked="" type="checkbox"/>	Consultant_Agreement...	
<input checked="" type="checkbox"/>	Signed Consultant_Agre...	

Total: 2



Professional Services (Consultant) Agreement ACC (Final Document Load-Submit to Project Manager)

- Verify Workflow
Action: Documents
Loaded
- Click **Send**
- The record will now go to
the End step



The screenshot shows a web browser window with the title "Professional Services Amendments - LACL Amendment 1 - Project No. OCI-080001 - Google...". The address bar shows the URL "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218440/undefined/undefined?_...". The main content area displays a "Workflow Action Details" dialog box. The dialog has a close button (X) in the top right corner. Under the "Action Details" section, there is a "Workflow Actions" dropdown menu with "Documents Loaded" selected, highlighted by a red rectangular box. To the right of this dropdown is a "Send For" field with "End" entered. Below these is a "CC" field with the placeholder text "Start typing for suggestions...". At the bottom of the dialog, there are two buttons: "Cancel" and "Send". A red arrow points to the "Send" button.

Questions?

Consultant List Assistance:

tasheena.duresky@ofcc.ohio.gov

OAKS CI Assistance:

oaksci@ofcc.ohio.gov or
614-644-2211

Job Aids:

ofcc.ohio.gov (full link below)

OAKS CI Tab

Agency/Higher Ed Training

Local Consultant List Training:

FAQ's, Training Guides, Consultant List Instructions and Forms, Consultant List Brochure

<https://ofcc.ohio.gov/OAKS-CI/Agency-Higher-Ed-Training/Locally-Administered-Consultant-List>

