



# OFCC Administration Consultant List



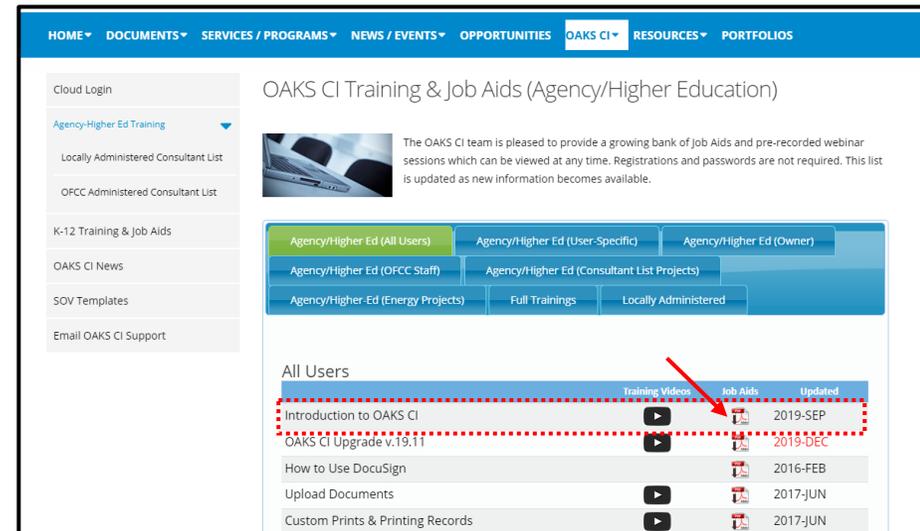
# OAKS CI Training and Support

To view additional job aids and training materials for OAKS CI:

1. Navigate to [ofcc.ohio.gov](http://ofcc.ohio.gov)
2. Mouse over the OAKS CI tab
3. Click Agency/Higher Ed Training

Before proceeding through this training document, it is recommended you view the [Introduction to OAKS CI](#) job aid.

For additional help, please contact the OAKS CI Support Desk - [oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)



# Topics

## Slide

[Overview of Changes](#)

5

[Consultant List Process Diagram](#)

6

[Project Creation Request, Information\(Initiation\) Form](#)

7

[Create Local Admin Authorization Request \(LAAR\)](#)

9

[Identify Consultants](#)

12

[Create Consultant Reservations](#)

17

[Release Consultant Reservations](#)

24

[Add Consultant Vendor Record to Project](#)

29

[Consultant Agreement Process](#)

33

[Consultant Pay Request](#)

104

[How to Find Help](#)

147



# Overview of the New Consultant List Process

- OFCC will continue to utilize a centralized list of vendors, and business processes integrated into OAKS CI, for the procurement and administration of Consultant List projects.
- There is a maximum limit of \$250K award to any firm during the biennium, similar to previous years.
- There will only be **one** Consultant List Agreement between OFCC and Consultant, housed within the project, it will no longer be housed in the SFC-xx0999 project.



# One-Stop Shop for Consultant List Information

## **Consultant List Assistance:**

tasheena.duresky@ofcc.ohio.gov

## **OAKS CI Assistance:**

oaksci@ofcc.ohio.gov or 614.644.2211

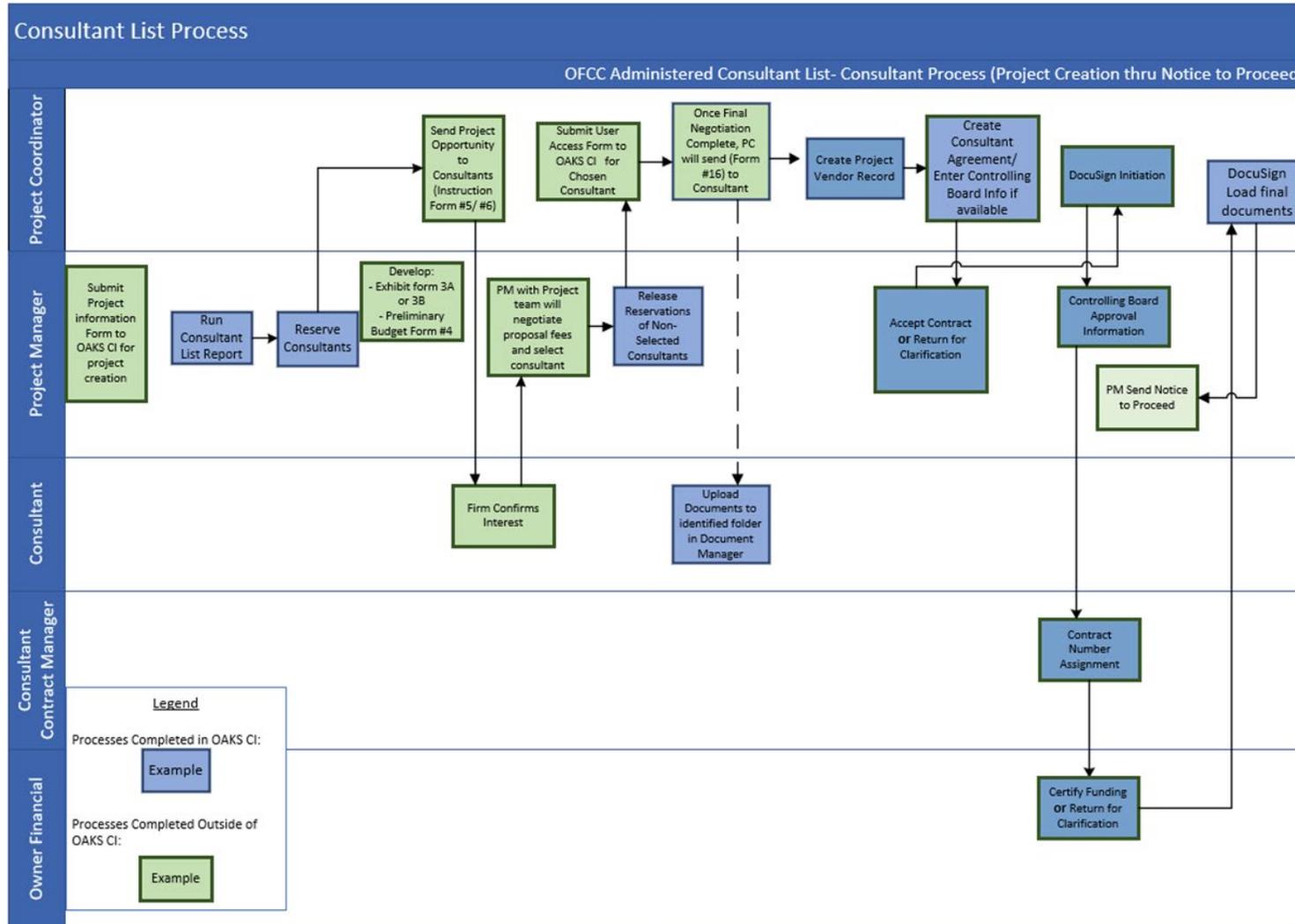
## **Job Aids:**

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

- ➔ OAKS CI Tab
- ➔ Agency/Higher Ed Training
- ➔ Local Consultant List Training:
- ➔ FAQ's, Training Guides, Consultant List Instructions and Forms



# Consultant List Process

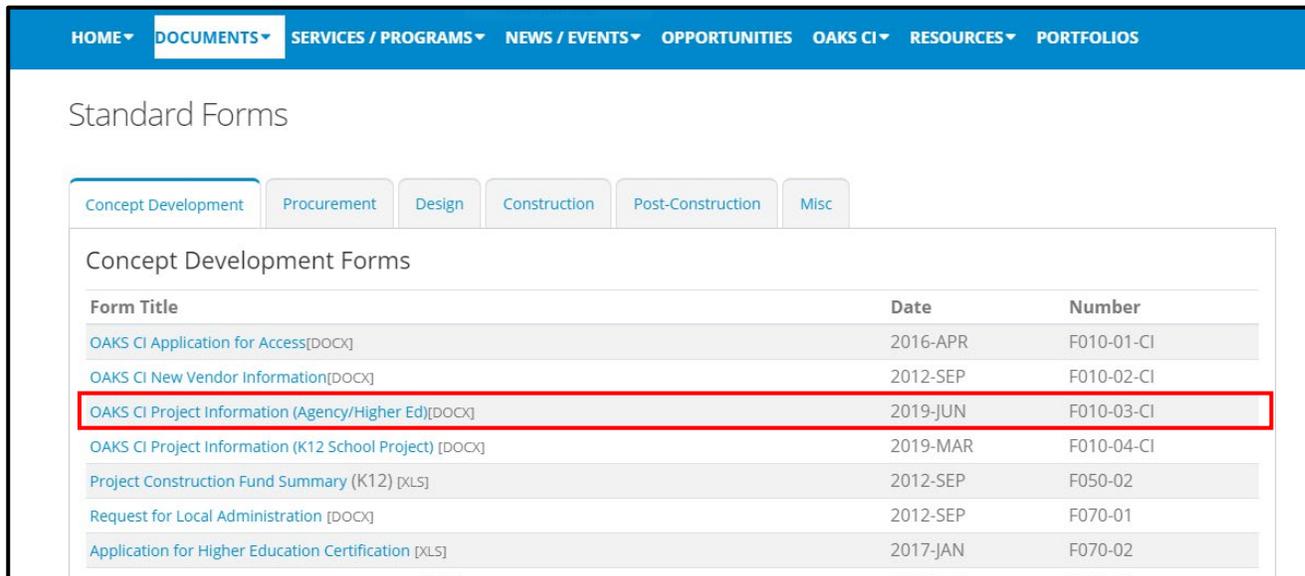


# Project Request



# Project Request

- ▶ Prior to completing any work in OAKS CI, the OAKS CI Project (Initiation) Information form must be completed and submitted to [oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)
- ▶ The form can be located at [ofcc.ohio.gov](http://ofcc.ohio.gov) under:
  - ▶ Documents tab → Standard Forms
  - ▶ Concept Development → [OAKS CI Project Information \(Agency/Higher Ed\)](#)



Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Concept Development Forms

Form Title	Date	Number
<a href="#">OAKS CI Application for Access[DOCX]</a>	2016-APR	F010-01-CI
<a href="#">OAKS CI New Vendor Information[DOCX]</a>	2012-SEP	F010-02-CI
<a href="#">OAKS CI Project Information (Agency/Higher Ed)[DOCX]</a>	2019-JUN	F010-03-CI
<a href="#">OAKS CI Project Information (K12 School Project) [DOCX]</a>	2019-MAR	F010-04-CI
<a href="#">Project Construction Fund Summary (K12) [XLS]</a>	2012-SEP	F050-02
<a href="#">Request for Local Administration [DOCX]</a>	2012-SEP	F070-01
<a href="#">Application for Higher Education Certification [XLS]</a>	2017-JAN	F070-02



# Identify Consultants



# Identify Consultants

- Determine if selection is a Pick 1 or Pick 3
  - If over \$100K, Pick 3 Vendors
  - If under \$100K, Pick 1; however, a Pick 3 is still an option
- In order to identify Consultants for use, the OFCC Project Manager will (PM) will run the below report:
  - **Consultant List Vendors Report-** identify consultants based on Capacity, Location and Discipline(s)



# Identify Consultants

- ▶ In order to find applicable consultants, run the user defined report in OAKS CI previously mentioned
  - ▶ Log into OAKS CI
  - ▶ Click the + sign
  - ▶ Click Company Workspace

*Please note: The report is housed in Company Workspace not within your project*

Business Process	Total
Advertisements	2
Closeout - Contractor	2
Closeout - Professional Services	1
Field Reports	18
Memorandum of Understanding	5
Prevailing Wage Report	265
Project Milestone	3
Project Vendors	3



# Identify Consultants- Consultant List Vendors Report

- ▶ Click Reports
  - ▶ Click User Defined
  - ▶ Double click the Report titled : Consultant List Vendors

The screenshot displays the Primavera Unifier (Development) interface. On the left, a navigation pane shows the 'Reports' folder expanded, with a red arrow pointing to the 'User-Defined' sub-section. In the center, a 'Tasks' pane shows a tree view of business processes, with a red arrow pointing to the 'Vendors' item under 'Non - Workflow Business Processes'. On the right, a 'User-Defined Reports' table is visible, with a red box highlighting the 'Consultant List Vendors' report. The table has the following columns: Name, Description, Data Type, Access Type, Report Type, Owner, Scheduled, and Last Run Date.

Name	Description	Data Type	Access Type	Report Type	Owner	Scheduled	Last Run Date
Consultant List Agreements	Consultant List - F Professional Ser, Permission Based	Tabular	Professional Ser, Permission Based	Tabular	Rita Nichols		
Consultant List Amendments	Consultant List Am Professional Ser, Permission Based	Tabular	Professional Ser, Permission Based	Tabular	Rita Nichols		
Consultant List PS Pay Requests	Consultant List PS Professional Ser, Permission Based	Tabular	Professional Ser, Permission Based	Tabular	Rita Nichols		
Consultant List Reservations	Consultant List Re Reservations - System	System	System	Tabular	Rita Nichols		
Consultant List Vendors	Consultant List - V Vendors - System	System	System	Tabular	Rita Nichols		
Project List - Delivery Method	Shell Information System	System	System	Tabular	Steve Mayo		
User List - Projects	Shell or Project U System	System	System	Tabular	Steve Mayo		



# Identify Consultants – Consultant List Vendors Report

- ▶ Select query parameters
- ▶ Choose CSV format
- ▶ Click Run

The screenshot shows a web browser window titled "User-defined Report: Consultant List Vendors - Google Chrome". The URL is [https://ohio-unifier.oracleindustry.com/bp/sys/report/run?pktype=cross&pkid=38316&\\_uref=uuu266527817t17](https://ohio-unifier.oracleindustry.com/bp/sys/report/run?pktype=cross&pkid=38316&_uref=uuu266527817t17). The interface has two tabs: "Query" and "Notes".

**Time Zone:** (UTC-05:00) Eastern Time (US & Canada)

**Report Query Parameters:**

Consultant List Name	equals	<input type="text"/>	Select
Available Capacity (\$)	greater than	15,000	
Disciplines	contains	<input type="text"/>	Select
EDGE Status	equals	<input type="text"/>	Select
Experience Categories (A-E)	contains	C10 Commercial Builc	Select
Experience Categories (F-M)	contains	<input type="text"/>	Select
Experience Categories (N-Z)	contains	<input type="text"/>	Select
County	equals	Franklin	Select

**Report Format:**  HTML  CSV  Excel  PDF  XML

**Record count for UDR:** -Select-

**Save Report Location:**  Save results in Unifier  Document Manager

**Save As:**

**Location:**  Select...

**Buttons:** Run, Cancel

Red arrows in the original image point to the "CSV" radio button and the "Run" button.

# Identify Consultants - Consultant List Vendors Report

- ▶ Click link to open
- ▶ View File (report can be saved to your computer)

The screenshot shows a web browser window with a report generation interface. The URL is [https://ohio-unifier.oracleindustry.com/bp/sys/report/run?pktype=cross&pkid=383160&\\_uref=uuu26652781717](https://ohio-unifier.oracleindustry.com/bp/sys/report/run?pktype=cross&pkid=383160&_uref=uuu26652781717). The interface includes a 'Query' tab, a 'Notes' tab, and a 'Report Query Parameters' section. The parameters are as follows:

Parameter	Operator	Value	Action
Consultant List Name	equals		Select
Available Capacity (\$)	greater than	15,000	
Disciplines	contains		Select
EDGE Status	equals		Select
Experience Categories (A-E)	contains	C10 Commercial Build	Select
Experience Categories (F-M)	contains		Select
Experience Categories (N-Z)	contains		Select
County	equals	Franklin	Select

Below the parameters, there are options for 'Report Format' (HTML, CSV, Excel, PDF, XML), 'Record count for UDR' (dropdown), and 'Save Report Location' (checkboxes for 'Save results in Unifier' and 'Document Manager'). A 'Save As' field and a 'Location' dropdown are also present. At the bottom, there are 'Run' and 'Cancel' buttons. A red arrow points to a file icon in the taskbar labeled 'Report - 2019-06-0...'. A 'Show all' button is visible in the bottom right corner of the report window.

The screenshot shows an Excel spreadsheet titled 'Report - 2019-06-06T160310.483 - Excel'. The spreadsheet contains a table with the following columns: Consultant Vendor Name, Federal Te, Experience, Experience Cat, Experience Categ, Disciplines, Vendor Roles(s), SOQ Score, EDGE Stati, Authorized C, Agreeem, Amendm, Reservati, Available Capa, County, and Vendor Sta. The data is as follows:

Consultant Vendor Name	Federal Te	Experience	Experience Cat	Experience Categ	Disciplines	Vendor Roles(s)	SOQ Score	EDGE Stati	Authorized C	Agreeem	Amendm	Reservati	Available Capa	County	Vendor Sta
OFCC Arch Stone Environmental 31-126268 A04 Air Pc G04 Geographi	001	Office Buildi	02	Administrative	08	CADD Technician, Architect/Engine	215	Yes	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Paul J. Ford & Comp 31-079366 A06 Airpo G01 Garages; V P02 Petroleum ar	02	Administrative	08	Architect/Engine			180	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Advanced Engineeri 31-161230 A05 Airpo F03 Fire Protec	001	Office Buildi	02	Administrative	08	Architect/Engine	142	Yes	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Dynamix Engineeri 31-153665 A06 Airpo F02 Field Hous	001	Office Buildi	02	Administrative	08	Architect/Engine	110	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Kramer Engineer 31-103577 A08 Animi F02 Field Hous	001	Office Buildi	02	Administrative	08	Architect/Engine	167	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Prater Engineering A 31-146519 A11 Audit F02 Field Hous	001	Office Buildi	02	Administrative	08	Architect/Engine	165	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Roger D. Fields Asso 47-359469 A11 Audit F02 Field Hous	001	Office Buildi	02	Administrative	08	Architect/Engine	71	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Terracon Consultant 42-124991 A06 Airpo G04 Geographi	001	Office Buildi	02	Administrative	05	Architect/Engine	135	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch S&ME, Inc. 56-079158 A06 Airpo G01 Garages; V N03 Nuclear Facil	02	Administrative	05	Architect/Engine			102	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Monks Engineers, LL 81-101403 A11 Audit F03 Fire Protec	001	Office Buildi	02	Administrative	21	Architect/Engine	141	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Sands Decker CPS, LL 31-160256 C10 Comm F03 Fire Protec	001	Office Buildi	02	Administrative	08	Architect/Engine	140	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Korda/Nemeth Engi 31-092299 A06 Airpo F02 Field Hous	001	Office Buildi	02	Administrative	08	Architect/Engine	135	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch O'Reilly Engineering 27-329485 B01 Barrac F01 Fallou She	001	Office Buildi	02	Administrative	08	Architect/Engine	205	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch XYZ Survey Service, (04-384661 C05 Child F05 Forensic En P05 Planning [Con	06	Architect, 08	CADD	Architect/Engine			276	Yes	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Pennom Associates 23-168342 B02 Bridg H04 Heating; V I001	Office Buildi	02	Administrative	06	Architect/Engine		141	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch MEP Associates 82-058194 A06 Airpo G01 Garages; V P06 Planning [SH	02	Administrative	21	Architect/Engine			186	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Strand Associates, In 39-102041 B02 Bridg G01 Garages; V R04 Recreation F	06	Architect, 07	Biolo	Architect/Engine			155	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Kohrs, Lonnemann, 161-070018 A06 Airpo H09 Hospital ar	001	Office Buildi	02	Administrative	13	Architect/Engine	130	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Geotechnical Consul 31-096079 B02 Bridg H07 Highways; 001	Office Buildi	02	Administrative	15	Architect/Engine		155	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Go Sustainable Enerj 20-541071 C10 Comm H09 Hospital ar	001	Office Buildi	02	Administrative	42	Architect/Engine	195	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Bennett Engineering 31-178118 C06 Churc F03 Fire Protec	001	Office Buildi	02	Administrative	21	Architect/Engine	163	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch HAWA Incorporated 31-064548 A11 Audit F03 Fire Protec	001	Office Buildi	02	Administrative	08	Architect/Engine	120	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch SMBH, Inc. 31-081418 A08 Animi F02 Field Hous	001	Office Buildi	02	Administrative	08	Architect/Engine	145	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch Shremshock Archite 31-102326 C10 Comm F03 Fire Protec	001	Office Buildi	02	Administrative	06	Architect/Engine	165	No	250,000.00	0	0	0	250,000.00	Franklin	Active



# Consultant Reservation

The Agency Consultant Coordinator(ACC) will:

- Reserve Consultant(s) to ensure their capacity is blocked for usage
  - *Reservations update nightly (once reservation is created, it will reflect in the OAKS CI Vendor report the next business day)*
  - *A reservation must be created for each project utilizing a consultant from the list*



# Create Reservation for Consultants

- ▶ In order to reserve a Consultant from the Consultant List, you must create a Reservation record in OAKS CI
- ▶ Log into OAKS CI
  - ▶ Click the + sign
  - ▶ Click Company Workspace

**Please note: The reservation is created in Company Workspace not in your project**

The screenshot displays the Oracle Primavera Unifier web application interface. The browser address bar shows the URL: <https://ohio-dev-unifier.oracleindustry.com>. The page title is "ORACLE Primavera Unifier (Development)".

The navigation menu includes "Home", "Tasks", "E-Signatures", "Drafts", and "Mailbox". The main content area is divided into several sections:

- My Active Tasks:** A search bar and a list of recent locations. A red box highlights the "+" sign in the navigation menu, and a red arrow points to the "Company Workspace" option in the dropdown menu.
- Task Status Distribution:** A pie chart showing the distribution of tasks by status: Late (581), Not Started (787), and In Progress.
- Task Distribution:** A horizontal bar chart showing the distribution of tasks by project/agency.
- Contract Schedule of Values:** A table showing the distribution of tasks by status (Late, Not Started, In Progress).
- Non - Workflow Business Processes:** A table showing the distribution of tasks by business process.

Contract Schedule of Values	Late	Not Started	In Progress
Contract Schedule of Values	0	12	18
Design Reviews	25	0	0
Meeting Minutes	0	7	15
Professional Services Agreements	0	1	1
Professional Services Amendments	0	0	2
Professional Services Pay Request	0	6	3
Professional Services Performance Evaluation	0	4	0
	0	15	1
	0	1	0

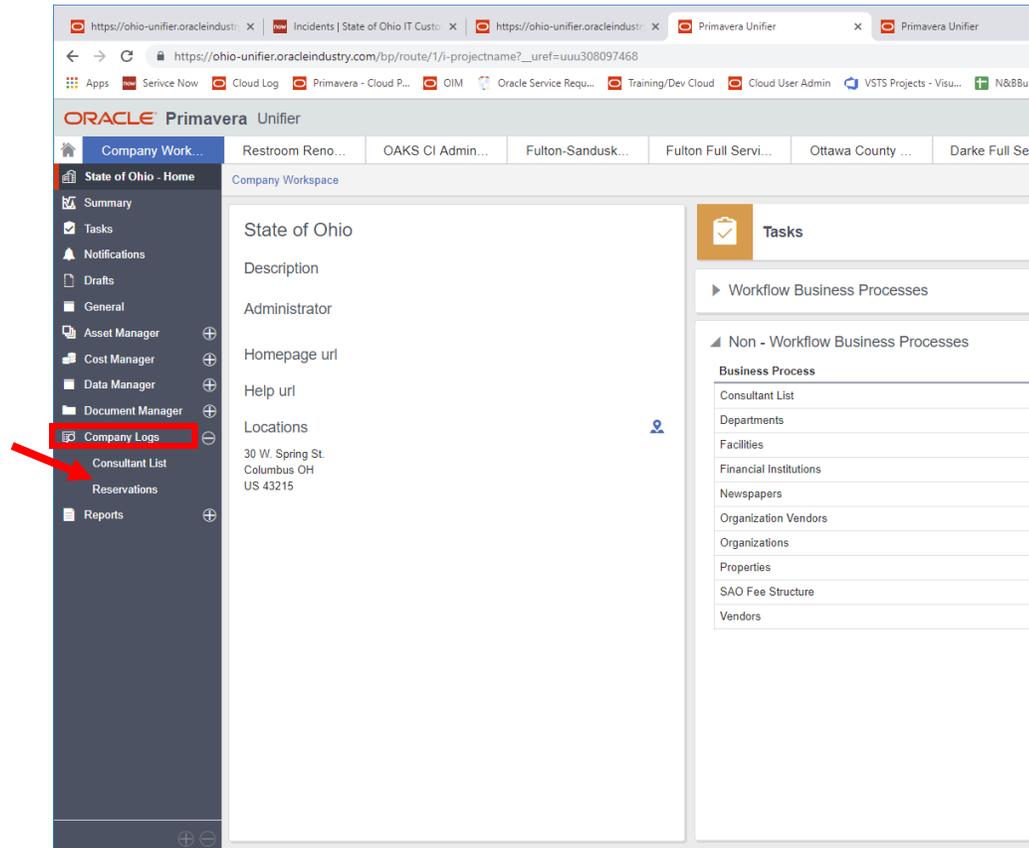
Business Process	Total
Advertisements	2
Closeout - Contractor	2
Closeout - Professional Services	1
Field Reports	18
Memorandum of Understanding	5
Prevailing Wage Report	265
Project Milestone	3
Project Vendors	3



# Create Reservation for Consultants

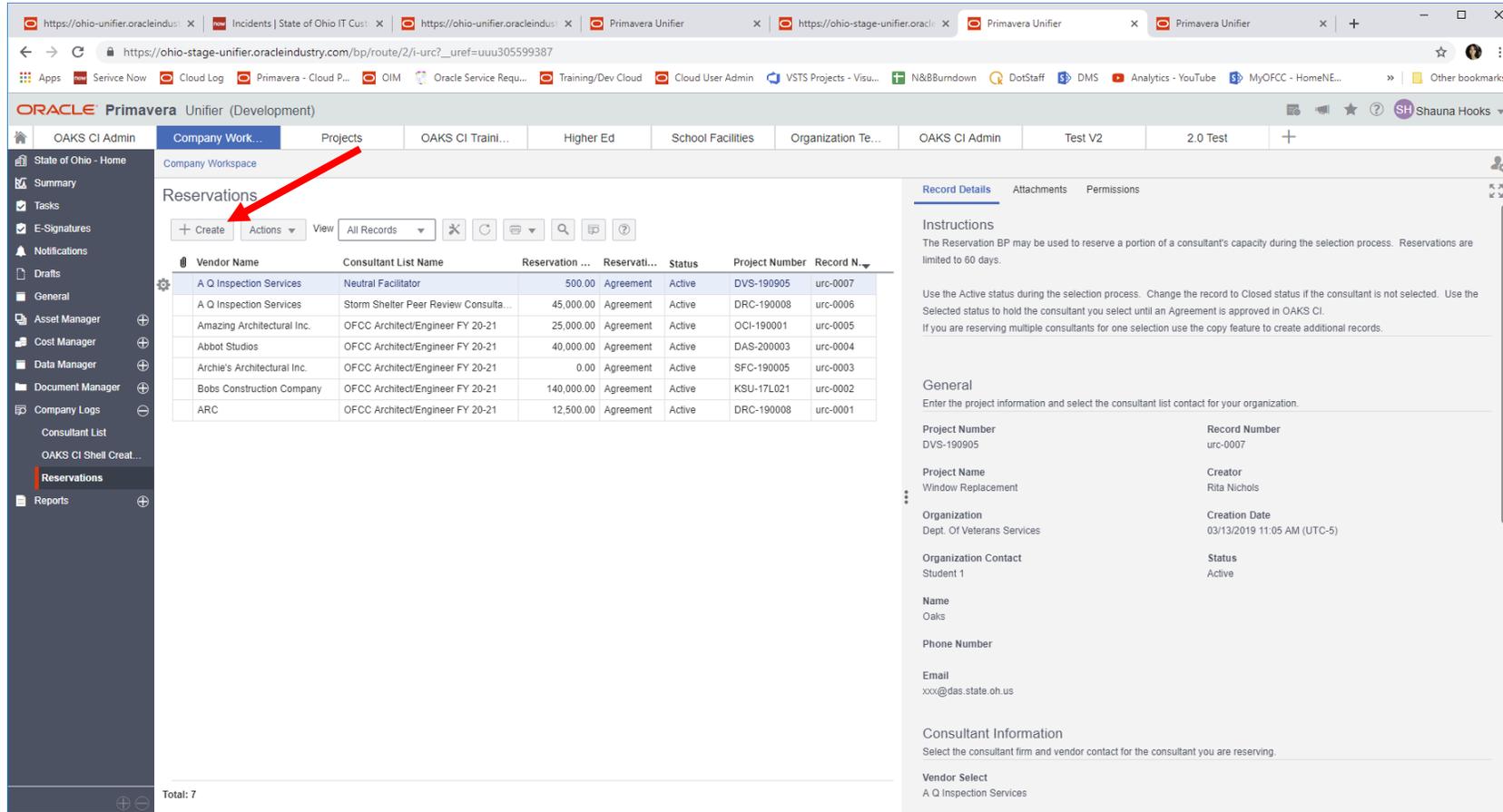
- ▶ Click **Company Logs**

- ▶ Select **Reservations**



# Create Reservation for Consultants

- ▶ Click Create



The screenshot displays the Primavera Unifier interface for creating a reservation. The main content area is titled "Reservations" and features a table with the following data:

Vendor Name	Consultant List Name	Reservation ...	Reservati...	Status	Project Number	Record N...
A Q Inspection Services	Neutral Facilitator	500.00	Agreement	Active	DVS-190905	urc-0007
A Q Inspection Services	Storm Shelter Peer Review Consulta...	45,000.00	Agreement	Active	DRC-190008	urc-0006
Amazing Architectural Inc.	OFCC Architect/Engineer FY 20-21	25,000.00	Agreement	Active	OCI-190001	urc-0005
Abbot Studios	OFCC Architect/Engineer FY 20-21	40,000.00	Agreement	Active	DAS-200003	urc-0004
Archie's Architectural Inc.	OFCC Architect/Engineer FY 20-21	0.00	Agreement	Active	SFC-190005	urc-0003
Bobs Construction Company	OFCC Architect/Engineer FY 20-21	140,000.00	Agreement	Active	KSU-17L021	urc-0002
ARC	OFCC Architect/Engineer FY 20-21	12,500.00	Agreement	Active	DRC-190008	urc-0001

The right-hand side of the interface contains a "Record Details" panel with the following information:

**Instructions**  
The Reservation BP may be used to reserve a portion of a consultant's capacity during the selection process. Reservations are limited to 60 days.

Use the Active status during the selection process. Change the record to Closed status if the consultant is not selected. Use the Selected status to hold the consultant you select until an Agreement is approved in OAKS CI.

If you are reserving multiple consultants for one selection use the copy feature to create additional records.

**General**  
Enter the project information and select the consultant list contact for your organization.

Project Number DVS-190905	Record Number urc-0007
Project Name Window Replacement	Creator Rita Nichols
Organization Dept. Of Veterans Services	Creation Date 03/13/2019 11:05 AM (UTC-5)
Organization Contact Student 1	Status Active
Name Oaks	
Phone Number	
Email xxx@das.state.oh.us	

**Consultant Information**  
Select the consultant firm and vendor contact for the consultant you are reserving.

**Vendor Select**  
A Q Inspection Services



# Create Reservation for Consultants

- ▶ Complete form by following instructions, all \* fields are mandatory
- ▶ Use Active status during selection process
- ▶ Click **Submit** when complete



# Create Reservation for Consultants

- ▶ Sample of Completed Reservation

Create New Reservations - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/urc/-1000?\_\_uref=uuu795097779t1

### Create New Reservations

Submit Save

Reservations Standard

#### General

Enter the project information and select the consultant list contact for your organization.

Project Number \*  
DRC-190008

Project Name \*  
Fence - Lindonville

Organization \*  
Dept. of Rehab. & Correction

Agency Consultant Contact \*  
Weber

Name  
Matthew

Phone Number

Email  
Matthew.Weber@ofcc.ohio.gov

Record Number

Creator  
Matthew Weber

Creation Date

Status \*  
Active

#### Consultant Information

Select the consultant firm and vendor contact for the consultant you are reserving.

Vendor Select \*  
Advanced Engineering Consultants

Vendor Name  
Advanced Engineering Consultants

Vendor Contact  
Atrey

Name  
Archana

Vendor Phone Number

Vendor Email  
archana.atrey@ofcc.ohio.gov

#### Reservation Information

Select the Consultant List you are using for this selection. Enter the expected contract amount under Reservation Amount. Enter an Expiration Date up to 60 days in the future.

Use the Agreement Reservation Type for new contracts. Use the Amendment Reservation Type to reserve capacity for a future Amendment to an existing contractor. Note that Amendments to consultant list contracts issued in the previous biennium consume capacity in the biennium when they are executed.

Consultant List Name \*  
OFCC Consultant List FY 20-21

Expiration Date \*  
11/30/2020

Selection Method

Reservation Period  
48

Reservation Amount (\$) \*  
45,000.00

Reservation Type \*  
Agreement

Attachments

Information  
No Attachments.



# Create Reservation for Consultants

- ▶ If there are no firms interested in your project opportunity, release reservations for each consultant in OAKS CI
  - ▶ Follow up with Project Team in order to attain new firms to pursue
  - ▶ Create new Reservations



# Release Reservation

- ▶ The ACC must release the reservation:
  - ▶ For any Consultant(s) not selected or not interested
  - ▶ Once an Agreement has been initiated for the chosen consultant



# Release Reservation

- ▶ You **must** release the reservation for any Consultant(s) not selected, and when the chosen consultant has an initiated agreement
- ▶ Log into OAKS CI
  - ▶ Click the + sign
  - ▶ Click Company Workspace

*Please note: The reservation is released in Company Workspace not within your project*

The screenshot displays the Primavera Unifier web application interface. The browser address bar shows the URL: [https://ohio-dev-unifier.oracleindustry.com/bp/route/home/f-unifier?\\_uref=uuu30678363](https://ohio-dev-unifier.oracleindustry.com/bp/route/home/f-unifier?_uref=uuu30678363). The page title is "ORACLE Primavera Unifier (Development)". The navigation menu includes "Home", "Tasks", "E-Signatures", "Drafts", and "Mailbox". The main content area shows a search bar, a "Mail" icon with "256 Total" and "36 Total", and a "Task Distribution" pie chart with segments for "Late" (501), "Not Started" (787), and "In Progress". Below the pie chart is a horizontal bar chart for "Task Distribution" with categories like "OAKS CI Training 1" (420), "OAKS CI Training 2" (378), "SAO Consultant List" (322), "OAKS CI Training 4" (191), "Oak Hills Local Building P..." (39), "Miami University Training..." (36), "OAKS CI Training 3" (21), "Agency General Function..." (18), "Cleveland State Training..." (13), and "OAKS CI District Training..." (10). A dropdown menu is open over the search bar, with "Company Workspace" highlighted by a red arrow. The dropdown menu includes "Recent Locations", "Bookmarks", "Key Locations", and "More...". The "Key Locations" section includes "Company Workspace", "Projects", "Agency", "Higher Ed", and "School Facilities". Below the dropdown is a table with columns for "Contract Schedule of Values", "Design Reviews", "Meeting Minutes", "Professional Services Agreements", "Professional Services Amendments", "Professional Services Pay Request", and "Professional Services Performance Evaluation". The table has columns for "Late", "Not Started", and "In Progress". The "Non - Workflow Business Processes" section is also visible at the bottom.



# Release Reservation

- ▶ Click Company Logs
  - ▶ Select Reservations
  - ▶ Double click the Reservation you wish to release

The screenshot shows the Primavera Unifier web application interface. The left sidebar contains a navigation menu with 'Company Logs' and 'Reservations' highlighted in red. The main content area displays a table of Reservations. The first row is selected, and its details are shown in the right sidebar.

Vendor Name	Consultant List Name	Reservation ...	Reservati...	Status	Project Number	Record N...
Amazing Architectural Inc.	OFCC Specialty Consultant List F...	300,000.00	Agreement	Active	DRC-190008	urc-0008
A Q Inspection Services	Neutral Facilitator	500.00	Agreement	Active	DVS-190905	urc-0007
A Q Inspection Services	Storm Shelter Peer Review Consulta...	45,000.00	Agreement	Active	DRC-190008	urc-0006
Amazing Architectural Inc.	OFCC Architect/Engineer FY 20-21	25,000.00	Agreement	Active	OCI-190001	urc-0005
Abbot Studios	OFCC Architect/Engineer FY 20-21	40,000.00	Agreement	Active	DAS-200003	urc-0004
Archie's Architectural Inc.	OFCC Architect/Engineer FY 20-21	0.00	Agreement	Active	SFC-190005	urc-0003
Bobs Construction Company	OFCC Architect/Engineer FY 20-21	140,000.00	Agreement	Active	KSU-17L021	urc-0002
ARC	OFCC Architect/Engineer FY 20-21	12,500.00	Agreement	Active	DRC-190008	urc-0001

**Record Details**

**Instructions**  
The Reservation BP may be used to reserve a portion of a consultant's capacity during the selection process. Reservations are limited to 60 days.

Use the Active status during the selection process. Change the record to Closed status if the consultant is not selected. Use the Selected status to hold the consultant you select until an Agreement is approved in OAKS CI.  
If you are reserving multiple consultants for one selection use the copy feature to create additional records.

**General**  
Enter the project information and select the consultant list contact for your organization.

Project Number DRC-190008	Record Number urc-0008
Project Name Fence - Lindonville	Creator Shauna Hooks
Organization Dept. of Rehab. & Correction	Creation Date 04/02/2019 03:21 PM (UTC-5)
Organization Contact Hooks	Status Active
Name Shauna	
Phone Number 614-728-7691	
Email shauna.hooks@das.state.oh.us	

**Consultant Information**  
Select the consultant firm and vendor contact for the consultant you are reserving.

**Vendor Select**  
Amazing Architectural Inc.



# Release Reservation

- ▶ Click **Edit**
- ▶ Change Status from Active to Complete
- ▶ Click **Submit**

Reservations - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/urc/3/0/0?model=urc&a=form.0&b=urc&srcid=3&id=3&source=database&project...

### Reservations

Reservations Standard

The Reservation BP may be used to reserve a portion of a consultant's capacity during the selection process. Reservations are limited to 60 days.

Use the Active status during the selection process. Change the reservation to Complete status if the consultant is not selected.

Use the Active status to hold the consultant you select until an Agreement is entered in OAKS CI. Once the Agreement is submitted, change the reservation status to Complete.

If you are reserving multiple consultants for one project use the copy feature to create additional records.

**General**  
Enter the project information and select the consultant list contact for your organization.

Project Number OCI-190001	Record Number RES-00003
Project Name OAKS CI Test	Creator Shauna Hooks
Organization Ohio Facilities Construction Commission	Creation Date 06/18/2019 06:58 AM (UTC-8)
Agency Consultant Contact 1	Status Complete
Name Student	
Phone Number	

Information  
No Attachments.

Reservations - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/urc/3/undefined/undefined?project\_id=-1000&\_uref=uuu795097779t1

### Reservations

Reservations Standard

Enter the project information and select the consultant list contact for your organization.

Project Number * OCI-190001	Record Number RES-00003
Project Name * OAKS CI Test	Creator Shauna Hooks
Organization * Ohio Facilities Construction...	Creation Date 06/18/2019 06:58 AM (UTC-8)
Agency Consultant Contact * 1	Status * Active
Name Student	
Phone Number	
Email oci1@das.state.oh.us	

**Consultant Information**  
Select the consultant firm and vendor contact for the consultant you are reserving.

Vendor Select \*  
Amazing Architectural Inc.

Information  
No Attachments.



# Release Reservation

- ▶ Release each reservation for each consultant in OAKS CI, not chosen.
- ▶ Release the reservation for the chosen consultant once the Agreement has been created



# Consultant Vendor Record

The Consultant Vendor record must be in the project prior to the creation of the Professional Services (PS) (Consultant) Agreement



# Create Vendor Record (PC)

## ▶ 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...> and the page title "Service Requests". The browser's address bar contains the user ID "uuuu600419530". The page header includes a navigation menu with items like "Company Work...", "ACF Fire Protec...", "OSHP - Academ...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the navigation menu, labeled 'a'. Below the navigation menu, a search bar contains the text "DPS-". A red arrow points to the search bar, labeled 'b'. Below the search bar, a table of search results is displayed, labeled 'c'. The table has three columns: "Name", "Number", and "Location". The search results are as follows:

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



# Create Vendor Record (PC)

► Once in your project:

- a. Click Data Manager
- b. Click Project Vendors K12

The screenshots illustrate the navigation steps in the Oracle Primavera Unifier interface. The top screenshot shows the 'Data Manager' menu item highlighted with a red arrow and a blue circle labeled 'a'. The bottom screenshot shows the 'Project Vendors K12' menu item highlighted with a red arrow and a blue circle labeled 'b'. The interface includes a sidebar menu, a breadcrumb trail, and a table of vendor records.

Vendor Name	Contact	School Distr
Amazing Architectural...		
CTL Engineering		
Dynamix Engineering		
H. R. Gray		



# Create Vendor Record (PC)

- c. Click **Create** to open a new record

*Complete all fields*

- d. Click Address tab to update Vendor address

- e. Click **Submit**

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top header shows 'ORACLE Primavera Unifier (Development)'. The navigation menu on the left includes 'OAKS CI District Training...', 'Alerts', 'Tasks', 'E-Signatures', 'Drafts', 'Mailbox', 'Information', 'Cost Manager', 'Data Manager', 'Budget Amendment', 'LFI Budget K12', 'Project Agreement', 'Project Milestone', 'Project Vendors', 'Document Manager', 'Logs', and 'Reports'. The main content area shows 'Project Vendors K12' with a '+ Create' button circled in blue and labeled 'c'. Below the header, there are tabs for 'General' and 'Address', with 'Address' circled in blue and labeled 'd'. The 'Submit Save' button is circled in red and labeled 'e'. The form fields include: Project Number (SFC-080001), Record Number, Project Name (OAKS CI District Training Project 1), Creator (Matthew Weber), School District (OAKS CI District Training Project - 1), Creation Date, Vendor (OAKS Plumbing), Status (Active), Vendor Name (OAKS Plumbing), and President / CEO (John Tree).



# Professional Services (Consultant) Agreement

*Create, Review, and Approve Agreement*



# Professional Services (Consultant) Agreement Purpose

- This Business Process (BP) utilizes the information presented in the Technical Proposal to develop the contract language and fee requirements for the Professional Services (Consultant) Agreement.
- Upon completion of this BP, the Professional Services Provider (Consultant) receives:
  - A contract
  - Authorization to proceed with the work
- The Professional Services (Consultant) Agreement BP also establishes the Schedule of Values (SOV) for Professional Services (Consultant) Pay Requests.



# Consultant Agreement

- Prior to creating a Professional Services (Consultant) Agreement record in OAKS CI:
  - Ensure that you have closed the reservations for the Consultants not chosen
  - Ensure that you have submitted a signed OAKS CI Request for Access form for the chosen Consultant to the OAKS CI Support team.
  - Ensure that you have added the Consultant to the project, via the Project Vendor record



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

- Project Coordinator will:
  - Initiate the Professional Services (Consultant) Agreement
    - Initiate Agreement in OAKS CI
    - Initiate DocuSign
    - Attach all finalized documents :
      - Final Negotiated Technical/fee proposal
      - Clean search of State Auditor (State Auditor website)
      - Exhibit A: Consultant Standard Terms and Conditions
      - Updated Exhibit B: Consultant Scope of Services (with updated schedule, if needed)
      - Attach the previously uploaded documents by Consultant\*



# Professional Services (Consultant) Agreement 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

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
DPS 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



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

- Click Logs
- Select - Professional Services Agreements
- Click Create

- *If given a Workflow Option: Select - Consultant List – Local Admin*

The screenshot displays the Oracle Primavera Unifier (Development) interface. The main window shows the 'Professional Services Agreements' screen. The left sidebar contains a navigation menu with 'Logs' highlighted in red. The 'Create' dropdown menu is open, showing 'Consultant List - Local Admin' as the selected option. The main table displays a list of agreements with columns for Title, Agency, Consultant, Designation, Amount, and CO Fee. The total number of records is 35.

Title	Agency	Consultant	Designation	Amount	CO Fee
Agreement w external ale BPG T...				\$1,000.00	
Agreement w external ale				\$0.00	
agreement					
agreement					
RT Test 7915				\$325,000.00	
RT Test 7915				\$325,000.00	
oci Jerry Company	Sands Decker Ltd.		Design	\$40,000.00	
OCI Richardson Company	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	



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

- Each section of the record requires entry of relevant information.
- Complete fields in the **General** tab as appropriate

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1006/5190?\_uref=uuu795097779t2

### Create New Professional Services Agreements

Send Save

General Agreement Details

This work flow creates a consultant list agreement. Release the Reservation for this Consultant once the Agreement record is Submitted.

Complete the form entering the amounts agreed to. On the lower form, enter or import the work breakdown specified in the agreement. 'Save' the record and then use File --> Print Preview --> Custom to create a custom print of the contract document.

Attach it with the technical proposal and submittals provided by the vendor then submit the record to the PM for review.

**General**

Organization: Department of Administrative Services

Project Number: OCI-080001

Project Name: OAKS CI Training 1

Project Location: Surface Road

Title: Consultant List Agreement 19.12

Selection Method: OFCC Architect/Engineer FY 20-21

Delivery Method: Consulting Only

Total Project Cost \$: 100,000.00

Record Number: [Empty]

Creator: Matthew Weber

Creation Date: [Empty]

Status: [Empty]

Fee Title: SAO Standard Fee 1

EDGE Waiver: Yes

EDGE Goal Percent: 0

EDGE Commitment (%): 0

**Vendor Information**

Professional Services Provider: Sands Decker Ltd.

Vendor Legal Name: Sands Decker Ltd.

EDGE Certified?: No

Joint Venture: No

Attachments: No Attachments.



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

Scroll down page:  
**Requirements block**

- Complete blocks – you may enter ‘See Attached’ if referenced documents are attached to the record

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1006/5190?\_uref=uuu795097779t2

### Create New Professional Services Agreements

Send Save

General Agreement Details

#### Requirements

Understanding the Project Budget  
See Attached

Understanding the Owner's Goals  
See Attached

Detail Description of Approach to Project  
See Attached

Description of Project Mgt. and Control  
See Attached

Description of Preliminary Project Schedule

Attachments  
No Attachments.

Enter 4000 or fewer characters.

# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

Scroll down page:  
**Fee Summary block:**

- For each category in the Fee Summary block enter **negotiated amounts**.
  - **Line Item Amounts** and **Difference** fields are auto-populated

Category	Amount (\$)	Line Item Amount (\$)	Difference (\$)
Basic Services	50,000.00	0.00	50,000.00
Reimbursable Cost	50,000.00	0.00	50,000.00
Additional Services	50,000.00	0.00	50,000.00
Allowance	50,000.00	0.00	50,000.00
<b>Total Agreement</b>	<b>200,000.00</b>	<b>0.00</b>	<b>200,000.00</b>



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add Details)

Scroll down form:

**Agreement Checklist Block:**  
Complete all fields and be prepared to attach all required documents

**Controlling Board Block:**  
If Controlling Board has been approved:  
Select **Yes** and  
Provide Controlling Board number and date

If Controlling Board has not been approved  
Select **No**

The screenshot shows a web browser window with the URL 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1006/5190?\_uref=uuu795097779t2'. The page title is 'Create New Professional Services Agreements'. The form is divided into two tabs: 'General' and 'Agreement Details'. The 'General' tab is active, showing a list of required fields. A red box highlights the instruction: 'Attach the Consultant Agreement document to be signed plus Exhibit A and B, the project Budget, and all checklist items to this record.' Below this, there are several dropdown menus and text input fields, all with red asterisks indicating they are required. The fields include: Proposal Guideline (Yes), Agreement Summary (Yes), EEO Requirements (Yes), EDGE Participation (Yes), Licensed in Ohio (Yes), Professional Liability Insurance (Yes), Worker's Comp Certificate (Yes), Worker's Comp Certificate Exp. Date (03/31/2021 05:00 PM (UTC-8)), and Clean Search of State Auditor's Database (Yes). A second red box highlights the 'Controlling Board' section, which contains the instruction: '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.' This section includes a dropdown for 'Controlling Board Approved?' (set to No), a text input for 'Controlling Board Number', and a date input for 'Controlling Board Date' (MM/DD/YYYY). A red arrow points from the 'Controlling Board Block' text to the 'Controlling Board' section. A blue dashed arrow points from the 'Attachments' section to the 'Controlling Board' section. The 'Attachments' section on the right shows a file upload icon and an information icon with the text 'Information No Attachments.'



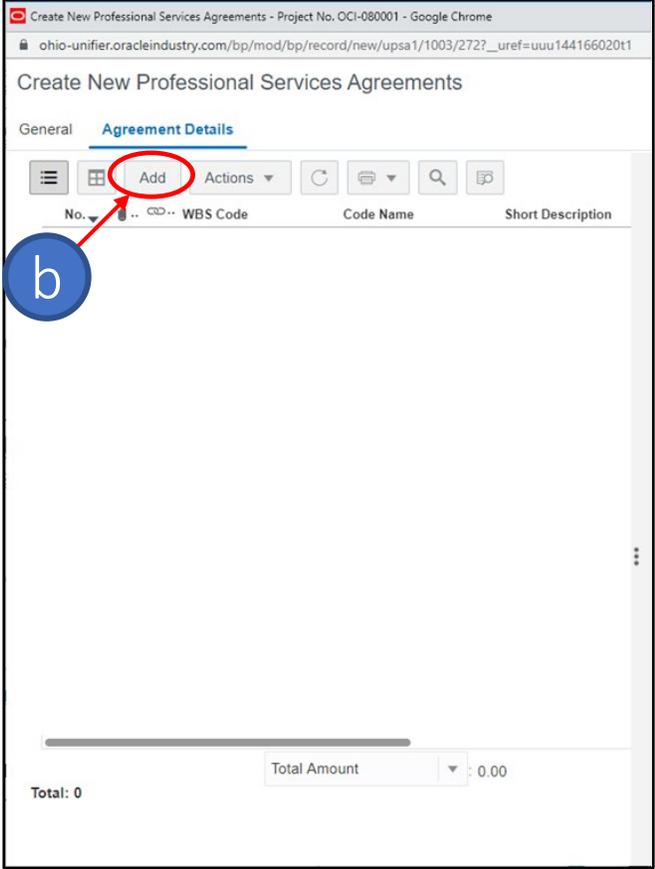
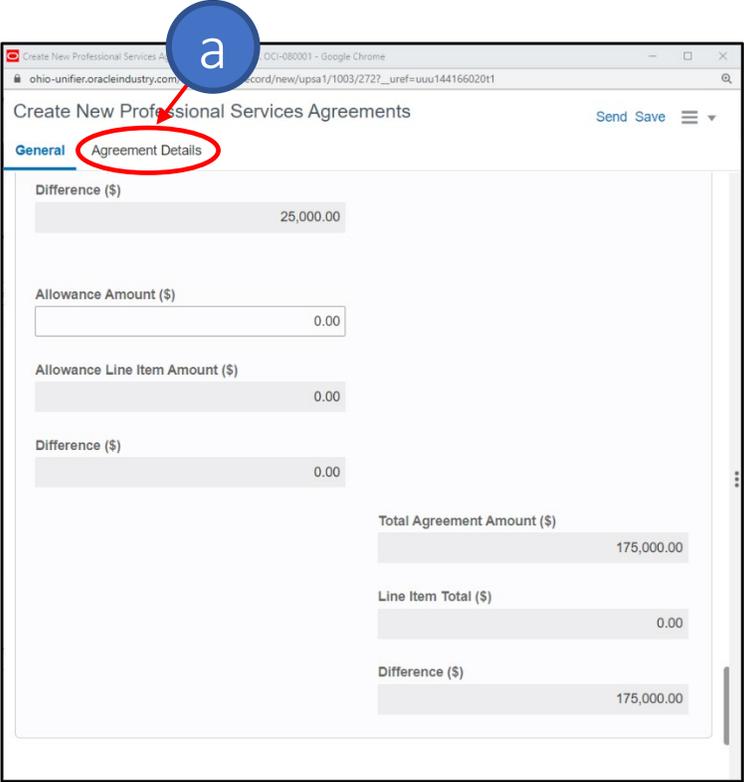
# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

- Line items are used to develop the Schedule of Values agreed to in the technical proposal
- Once the Agreement is approved, the line items will form the basis for each PS (Consultant) Pay Request
- Add as many line items as necessary for this record to define the proposed compensation items



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

- a) Open the **Agreement Details** Tab
- b) Click **Add** to begin adding Line Items



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

- c) Click the **Select** button next to WBS Code
- d) In the new window, click the Collapse button

Line Item Details

General

WBS Code \*

Type CBS Code or Name...

Code Name

Short Description \*

Professional Services EDGE Certified?

Yes

Subcontractor/Supplier

Type a Subcontractor/Supplier...

EDGE Certified?

Fee Category (Enter all \$ to 1 category)

Basic Services Amount (\$)

0.00

Basic Services (%)

0

Reimbursable Cost Amount (\$)

0.00

Additional Services Amount (\$)

0.00

Allowance Amount (\$)

0.00

Notes

CBS Picker

CBS Code	CBS Name
PA-00-00	Property Acquisition Summary
PA-PA-00	Property Acquisition General
PA-PA-AP	Real Estate Appraisal
PA-PA-BE	Property Acquisition Budget
PA-PA-RC	Real Estate Commission
PA-LA-00	Land Acquisition Summary
PA-LA-BE	Land Acquisition Budget
PA-LA-OT	Land Acquisition Expense
PA-EA-00	Easement Acquisition Summary
PA-EA-BE	Easement Acquisition Budget
PA-EA-OT	Easement Acquisition Expense
RM-00-00	Relocation and Moving Summary
RM-RM-00	Relocation and Moving Expense
RM-RM-BE	Relocation and Moving Budget
RM-RM-LS	Leased Temporary Space
RM-RM-MX	Moving Expense
LE-00-00	Legal Expense Summary
LE-LE-00	General Legal Expense

Total: 343

Cancel Select



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

## Frequently Used Line items for **Basic Services**

<u>Description</u>	<u>WBS Code</u>
1) Pre-Design Services	AE-BS-PD
2) Schematic Design	AE-BS-SD
3) Design Development	AE-BS-DD
4) Construction Documents	AE-BS-CD
5) Bidding and Award services	AE-BS-BA
6) Conform Documents	AE-BS-CN
7) Construction Administration	AE-BS-CA
8) Closeout services	AE-BS-CL



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

## Frequently Used Line items for **Additional Services** and **Reimbursables**

### Description

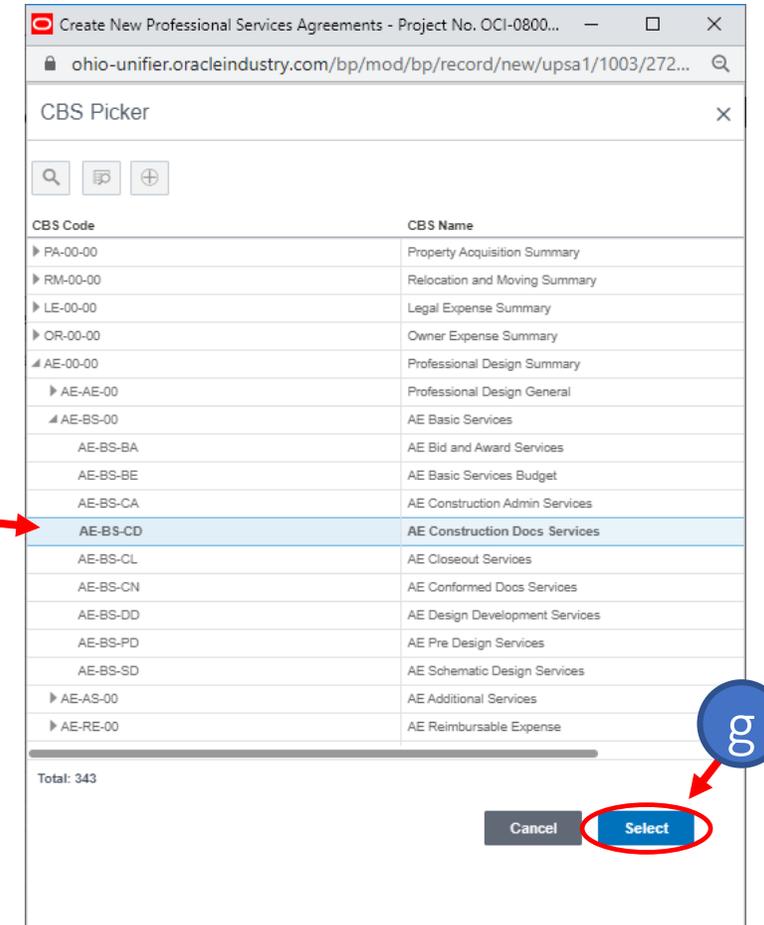
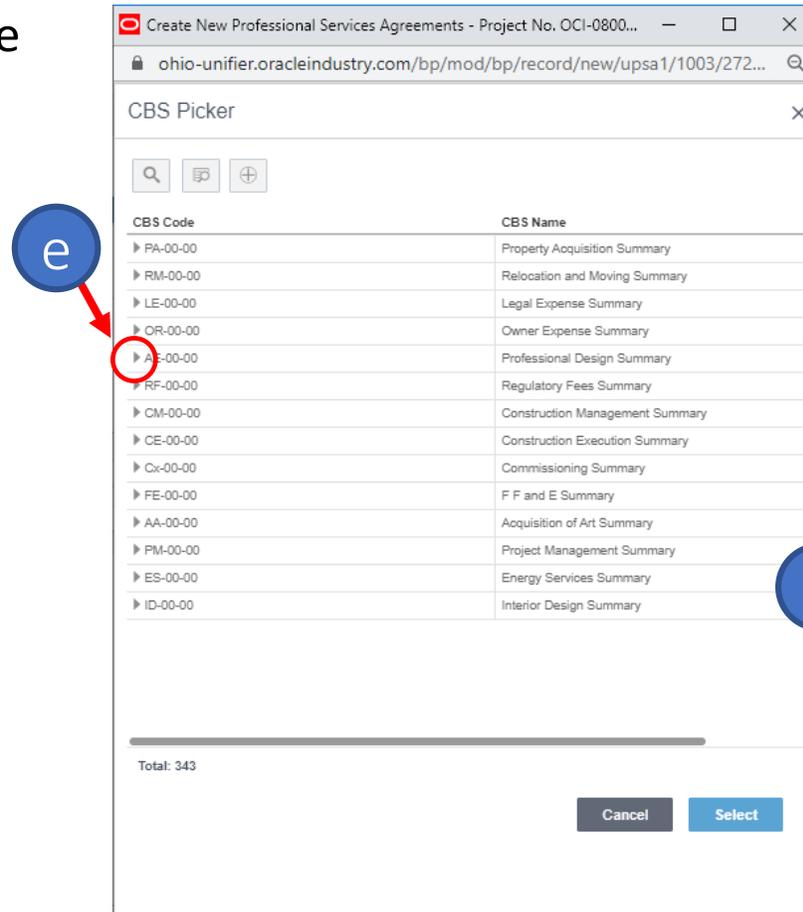
### WBS Code

1) Field Investigation	AE-AS-OT
2) Multiple Phases	AE-AS-OT
3) Testing (geotechnical or other)	AE-AS-TI
4) Printing	AE-RE-DP
5) Plan Approval and Permits	RF-GF-PP
6) Advertisement	AE-RE-OT
7) Special Inspections	AE-RE-OT



# Professional Services Agreement

- e) Click the arrow next to the AE Line
- f) Choose a category
- g) Click **Select**



# Professional Services Agreement

h) Enter a Short Description

i) Enter Fee Category Information

- ▶ See example Line Items to the right:
  - ▶ The Line Item in Example 1 identifies Basic Services
  - ▶ The Line Item in Example 2 falls under Reimbursable Costs
  - ▶ **The record will not move forward if the amounts are in the incorrect Fee Category**

j) Click “Save & Add New” to continue adding all necessary line

Example 1

Example 1 screenshot showing the 'Line Item Details' form. The 'Short Description' field is highlighted with a red box and labeled 'h'. The 'Basic Services Amount (\$)' field is highlighted with a red box and labeled 'i'. The 'Save & Add New' button is highlighted with a red arrow and labeled 'j'.

Example 2

Example 2 screenshot showing the 'Line Item Details' form. The 'Reimbursable Cost Amount (\$)' field is highlighted with a red box.



# Professional Services Agreement

- ▶ Line Items will populate under Agreement Details
- ▶ Double click the line item to make adjustments

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

Add Actions

No.	WBS Code	Code Name	Short Description	Basic Services (%)	Amount
003	AE-BS-PD	AE Pre Design Services	Additional	0	25,000.00
002	AE-AS-TI	AE Tests and Inspections	Tests and Inspections	0	50,000.00
001	AE-BS-CD	AE Construction Doc...	Pre Design	100	100,000.00

Total: 3

Total Amount: 175,000.00

Line Item Details Attachments Linked Records

General

WBS Code \*  
AE-BS-CD

Code Name  
AE Construction Docs Services

Short Description \*  
Pre Design

Professional Services EDGE Certified?  
No

Subcontractor/Supplier  
Type a Subcontractor/Supplier...

EDGE Certified?

Cancel Save Save & Add New



# Professional Services Agreement

- ▶ When all line items have been added, take note of the **Total Amount** on the Agreement Details tab.
- ▶ This should match the Total Agreement Amount from the General tab and the Difference should be **\$0.00** (see next slide)

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

General **Agreement Details**

Add Actions Refresh Print Search Help

No.	WBS Code	Code Name	Short Description	Basic Services (%)	Amount
004	OR-CF-AE	AE Change Order Allow...	Change Order Allowance	0	1,000.00
003	AE-BS-PD	AE Pre Design Services	Additional	0	25,000.00
002	AE-AS-TI	AE Tests and Inspections	Tests and Inspections	0	50,000.00
001	AE-BS-CD	AE Construction Docs ...	Pre Design	100	100,000.00

Total: 4

Total Amount: 176000.00



# Professional Services Agreement

- a) Open the **General** tab
- b) Scroll down to the bottom of the Fee Summary section
- c) Ensure the Total Agreement Amount is equal to the Line Item Total. The Difference in each category as well as the Total Difference must equal \$0.00

Additional Services Line Item Amount (\$) 25,000.00

Difference (\$) 0.00

Allowance Amount (\$) 1,000.00

Allowance Line Item Amount (\$) 1,000.00

Difference (\$) 0.00

Total Agreement Amount (\$) 176,000.00

Line Item Total (\$) 176,000.00

Difference (\$) 0.00

Attachments Comments Linked Records Linked Mail

Information No Attachments.



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

Once record is complete:

- a) Click the Menu at the top right of the record
- b) Click **Print**
- c) Select **Custom**

The screenshot displays the 'Professional Services Agreements' record page in Oracle Fusion. The page title is 'Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/open/upsa1/3226/0/0?srcid=3226&model=upsa1&fromcostlog=1&pr...'. The page shows the 'General' tab with the following details:

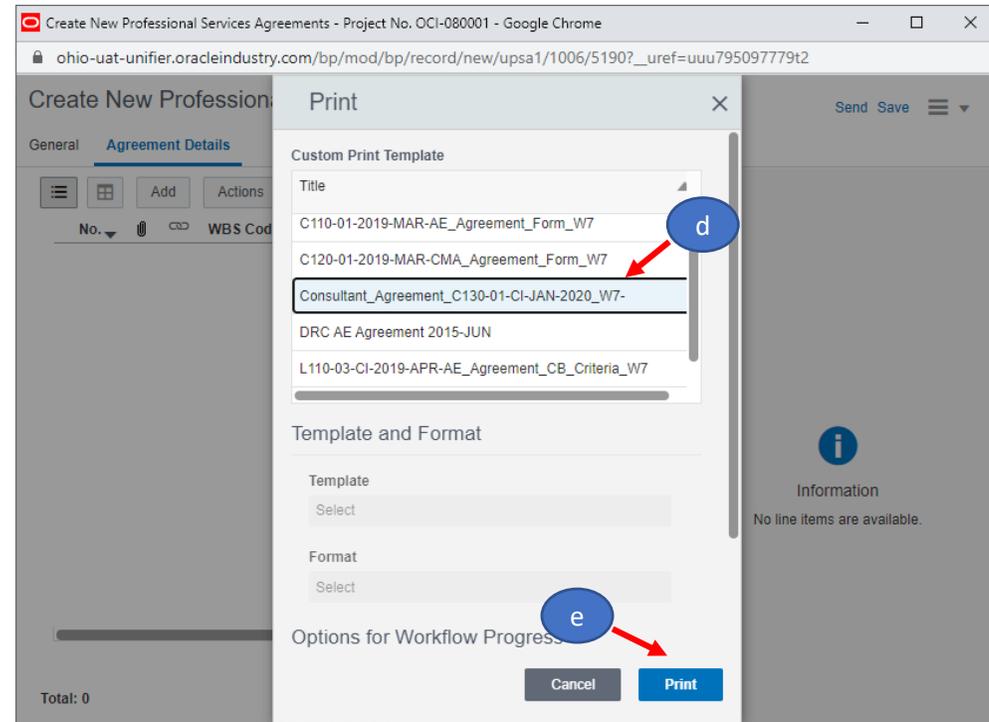
Field	Value
Organization	OAKS CI Test
Record Number	Agree-0024
Project Number	OCI-080001
Creator	Matthew Weber
Project Name	Agency General Projects Test
Creation Date	04/14/2020 02:55 PM (UTC-5)
Project Location	OAKS CI Administration
Status	Pending
Title	OCI General 080001-02
Fee Title	OFCC Standard Fee

The 'Print' 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, and the 'Custom ...' option is selected. Red arrows and blue circles (a, b, c) indicate the steps: (a) clicking the menu, (b) clicking 'Print', and (c) selecting 'Custom'.



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

- d. Select: Consultant Agreement
- e. Click : **OK**

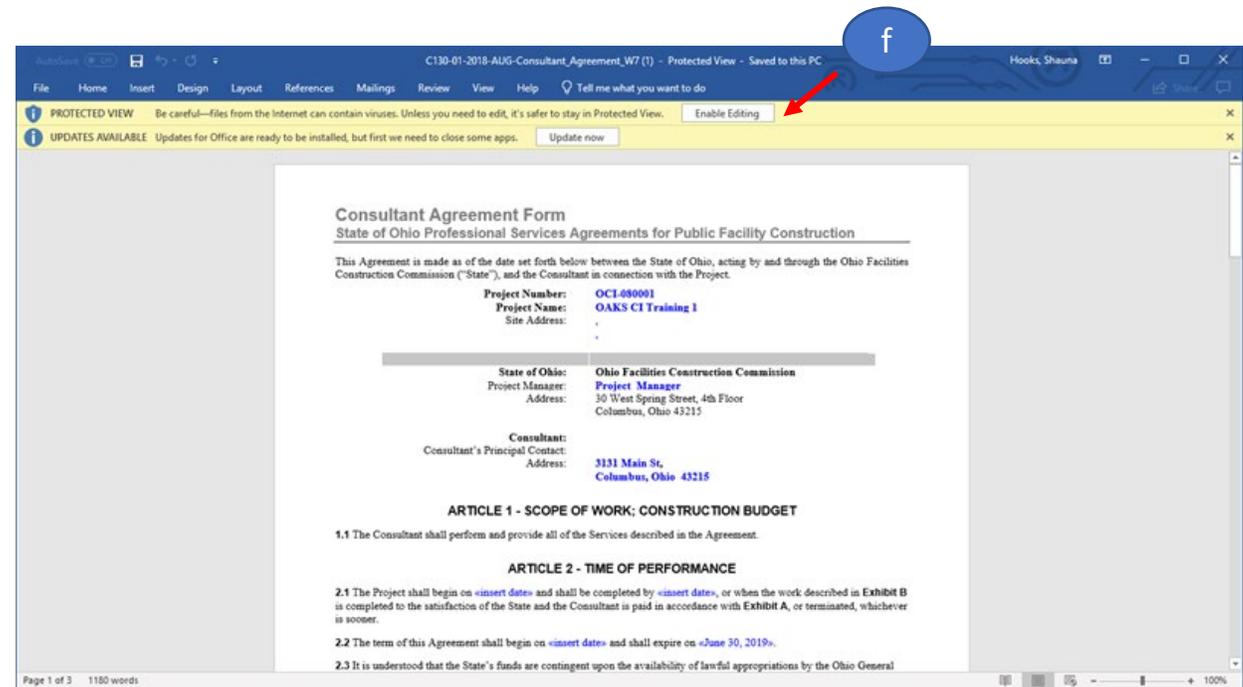


# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

Open the document

f. Click Enable Editing and update any necessary fields.

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



# Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

- 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 a 'Select' button 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 (Submit to Project Manager)

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 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 shows the Oracle Primavera Unifier (Development) interface. The left sidebar contains a navigation menu with categories like Alerts, uMail, Collaboration, Tasks, Notifications, Drafts, Information, Cost Manager, Data Manager, Document Manager, Reports, and Logs. The main area displays a list of tasks under the heading 'Tasks'. A red arrow points to a task record with the following details:

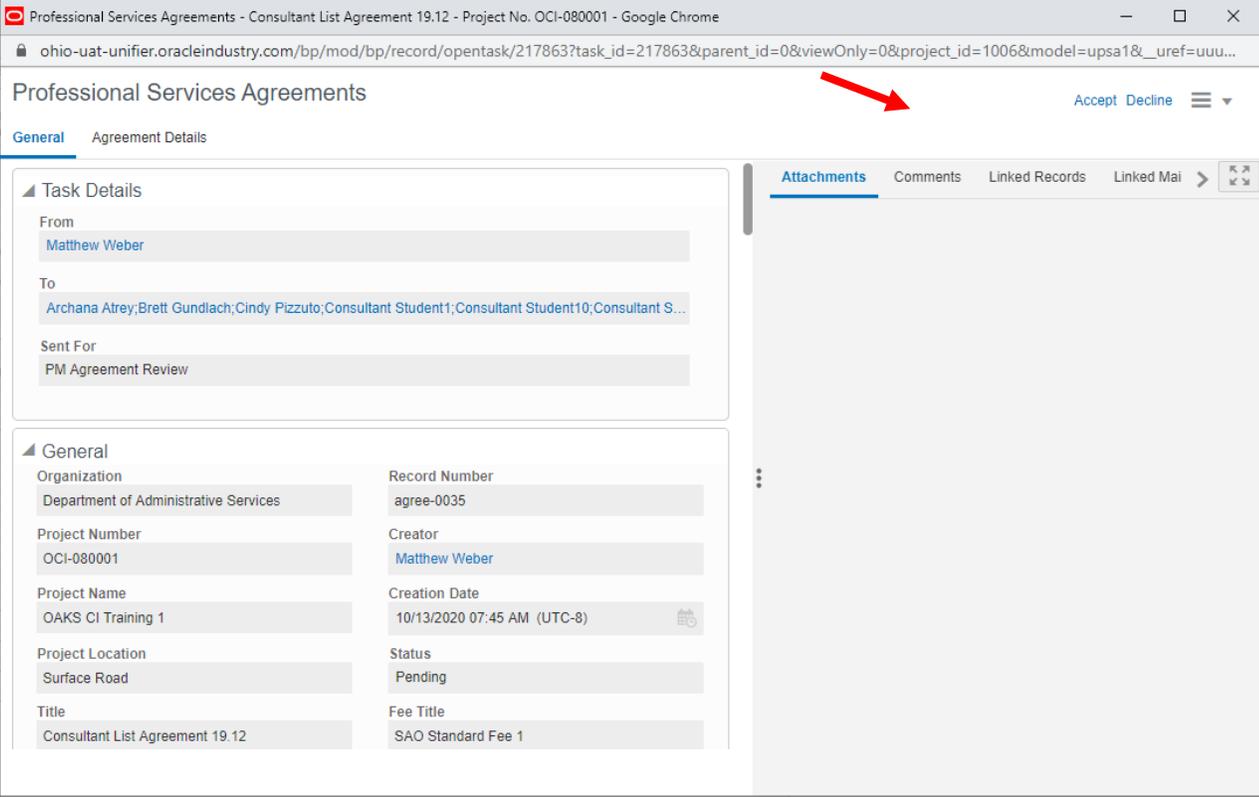
Business Process	Record Number	Title	Record Due	From	Sent for
OAKS CI Training 1	Professional Ser...	agree-0036	Consultant List ...	Shauna Hooks, s...	Agreem

Total: 1



# Professional Services (Consultant) Agreement PM (Review and Controlling Board)

➤ Click **Accept**



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

- Browser Tab:** Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome
- URL:** ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217863?task\_id=217863&parent\_id=0&viewOnly=0&project\_id=1006&model=upsa1&\_\_uref=uuu...
- Page Title:** Professional Services Agreements
- Buttons:** Accept, Decline, and a menu icon.
- Navigation:** General (selected), Agreement Details
- Task Details:**
  - From:** Matthew Weber
  - To:** Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant Student10; Consultant S...
  - Sent For:** PM Agreement Review
- General Information:**

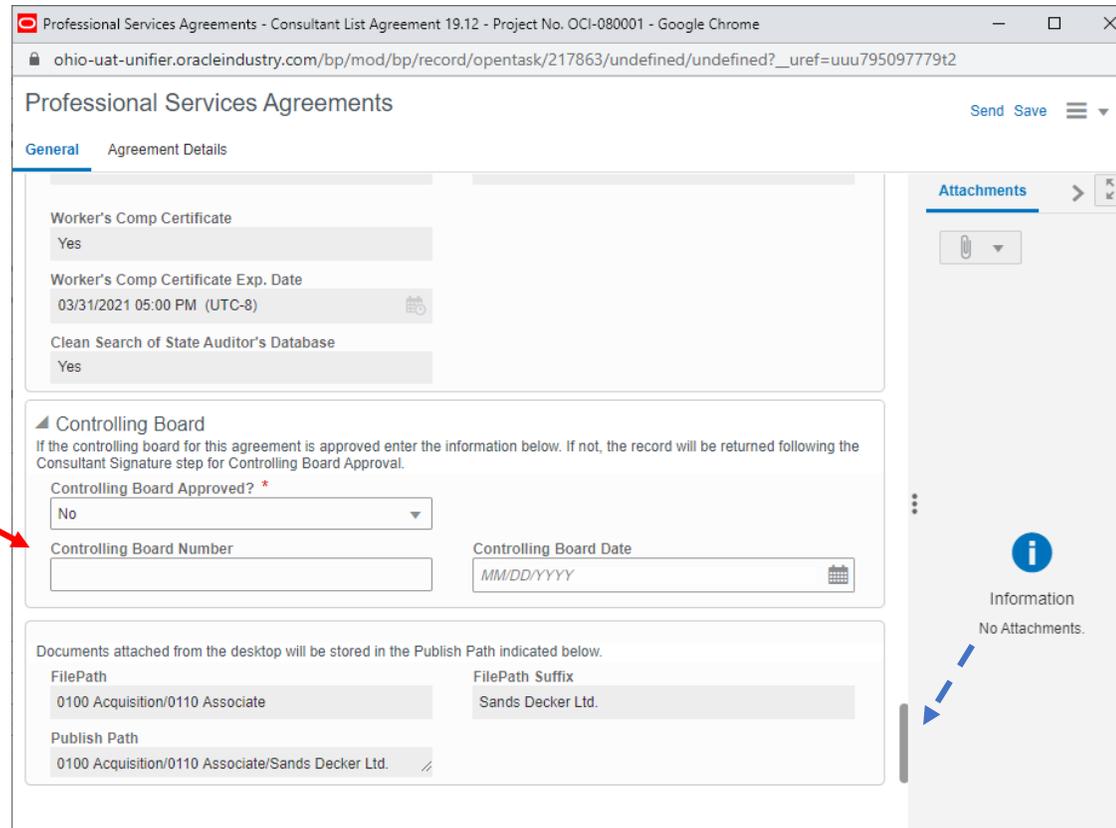
Organization	Department of Administrative Services	Record Number	agree-0035
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	10/13/2020 07:45 AM (UTC-8)
Project Location	Surface Road	Status	Pending
Title	Consultant List Agreement 19.12	Fee Title	SAO Standard Fee 1
- Attachments:** A sidebar with tabs for Attachments, Comments, Linked Records, and Linked Mail.



# Professional Services (Consultant) Agreement (PM Review and Controlling Board\*)

- 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 screenshots of a web application interface for 'Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001'. 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 the 'Send' button circled in red.



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

- ▶ Project Coordinator receives email
- ▶ Click on the “Unifier Login” button to access the task

This is a system-generated e-mail message. Do not reply to sender.

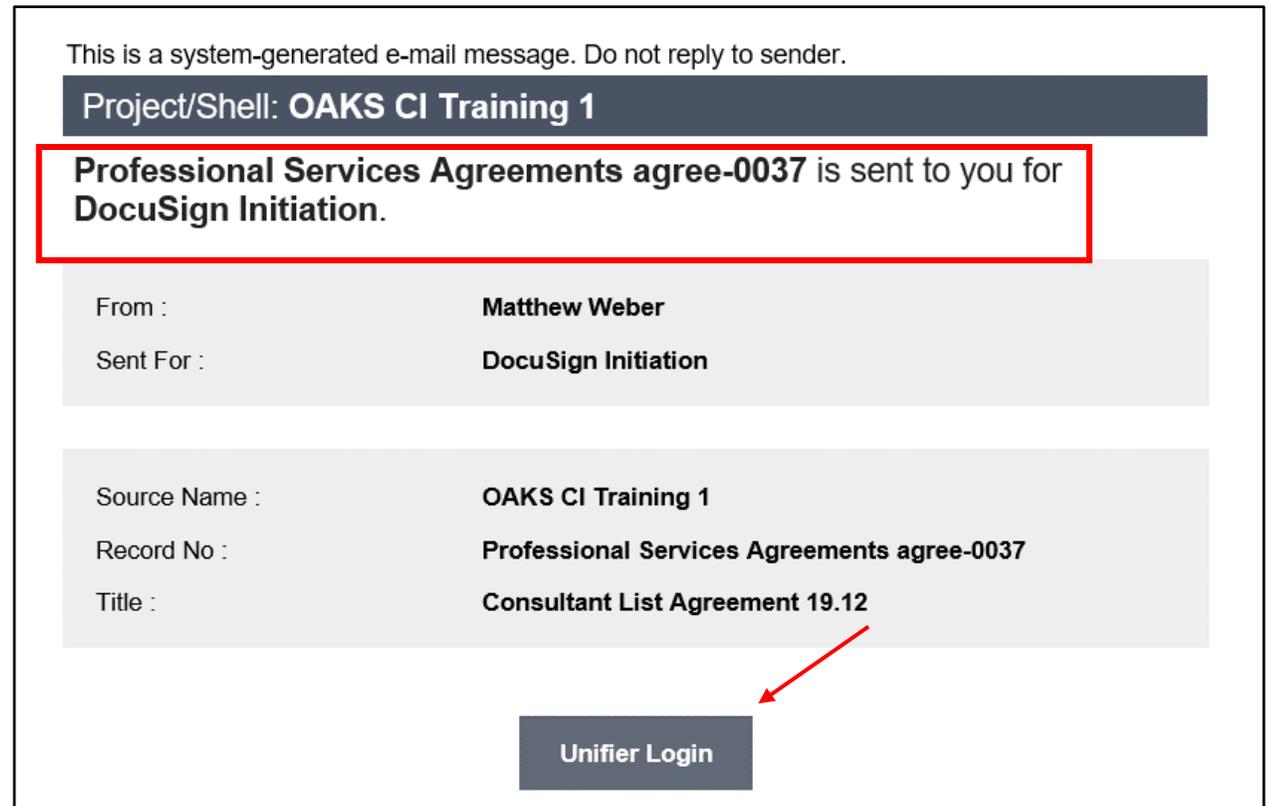
**Project/Shell: OAKS CI Training 1**

**Professional Services Agreements agree-0037 is sent to you for DocuSign Initiation.**

From : **Matthew Weber**  
Sent For : **DocuSign Initiation**

Source Name : **OAKS CI Training 1**  
Record No : **Professional Services Agreements agree-0037**  
Title : **Consultant List Agreement 19.12**

[Unifier Login](#)



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

- ▶ 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/open/upsa1/571/0/0?srcid=571&model=upsa1&fromcosting=1&project\_id=1006&nfl=0&...

## Professional Services Agreements

General Agreement Details

**Task Details**

From: Matthew Weber

To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Matthew Weber; Moenique Morris; Purma Iruk...

Sent For: DocuSign Initiation

**General**

Organization	Department of Administrative Services	Record Number	agree-0037
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	10/13/2020 09:48 AM (UTC-8)
Project Location	Surface Road	Status	Pending
Title	Consultant List Agreement 19.12	Fee Title	SAO Standard Fee 1

**Attachments**

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

Total: 2



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

- 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 with 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 "General" tab is active, displaying a form with the following fields:

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 Pending
Title Consultant List Agreement 19.12	Fee Title SAO Standard Fee 1
Selection Method OFCC Architect/Engineer FY 20-21	
Delivery Method Consulting Only	EDGE Waiver Yes
Total Project Cost \$	EDGE Goal Percent

On the right side, the "Attachments" tab is circled in red. It shows a list of attachments under the heading "Unpublished Attachments". One attachment is listed: "Consultant\_Agreement...". A red arrow points from the "Attachments" tab to this attachment. Below the attachment list, it says "Total: 1".



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

- 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 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..

Attachments Comments

Browse... Document Manager... Consultant\_Agreement\_... Signed Consultant\_Agre...

**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 (U...)  
Project Location: Surface Road  
Status: Pending  
Title: Consultant List Agreement 19.12  
Fee Title: SAO Standard Fee 1  
Selection Method: OFCC Architect/Engineer FY 20-21  
Delivery Method: Consulting Only  
EDGE Waiver: Yes  
Total Project Cost \$: .....  
EDGE Goal Percent: .....

**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

Total: 2

Copy Comments

Cancel Select



# 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



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

Choose Workflow Action:  
**DocuSign Initiated**

➤ Click **Send**

*The record will now go to the  
Project Manager for  
Controlling Board information*

The image displays two screenshots of a web application interface for initiating a workflow action. The browser window title is "Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-080001 - Google Chrome".

The first screenshot shows the "Workflow Action Details" dialog box. The "Workflow Actions" dropdown menu is open, and "DocuSign Initiated" is highlighted. A red arrow points to the dropdown menu.

The second screenshot shows the same dialog box with "DocuSign Initiated" selected. The "Send For" field is set to "Contract Number Assignment". The "To" field contains the email addresses: "Archana Atrey; Brett Gundlach; Cindy Pizzuto; Matthew Weber; Moenique Morris; Purna Irukulapati; ...". The "CC" field is empty. The "Due Date Details" section shows "Task Due Date" as "Task Due Date is not available". A red arrow points to the "Send" button, which is highlighted with a red circle.



# Professional Services (Consultant) Agreement Project Manager (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

\*This step will only occur if the PM did not provide Controlling Board information at the PM Review step

The screenshot displays the ORACLE Primavera Unifier (Development) interface. The left sidebar shows a navigation menu with 'Tasks' selected. The main content area shows a 'Tasks' table with one record. A red arrow points to the record.

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

Total: 1



# Professional Services (Consultant) Agreement Project Manager (Controlling Board)\*

➤ 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/218203?task\_id=218203&parent\_id=0&viewOnly=0&project\_id=0006&model=upsa1&\_uref=uuu...

### Professional Services Agreements

[Accept](#) [Decline](#) ☰

**General** Agreement Details

#### Task Details

From: Matthew Weber

To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Matthew Weber; Moenique Morris; Purna Irukulapati; Rita ...

Sent For: Contract Number Assignment

#### General

Organization	Department of Administrative Services	Record Number	agree-0037
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	10/13/2020 09:48 AM (UTC-8)
Project Location	Surface Road	Status	Accepted
Title	Consultant List Agreement 19.12	Fee Title	SAO Standard Fee 1

#### Attachments

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

Total: 2



# Professional Services (Consultant) Agreement Project Manager (Controlling Board)\*

- Scroll down to:  
**Controlling Board**
- Complete **Controlling Board** block:
  - **Select Yes**
  - **Enter Controlling Board Number and Date**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217907/undefined/undefined?\_\_uref=uuu795097779t2

### Professional Services Agreements

Send Save

General Agreement Details

Total Project Cost \$	100,000.00	EDGE Goal Percent	0
		EDGE Commitment (%)	0

Vendor Information

Professional Services Provider	Sands Decker Ltd.	PS Acquisition	
Vendor Legal Name	Sands Decker Ltd.	EDGE Certified?	No
		Joint Venture	No

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? \*  
Yes

Controlling Board Number  
12345678

Controlling Board Date  
09/01/2020

Attachments

Name
Published Attachments
Consultant_Agreement...
Signed Consultant_Agre...

Total: 2

# Professional Services (Consultant) Agreement Project Manager (Controlling Board)\*

- 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/217907/undefined/undefined?\_\_uref=uuu795097779t2

### Professional Services Agreements

General Agreement Details

Total Project Cost \$ 100,000.00

EDGE Goal Percent 0

EDGE Commitment (%) 0

#### Vendor Information

Professional Services Provider: Sands Decker Ltd.

Vendor Legal Name: Sands Decker Ltd.

PS Acquisition

EDGE Certified?: No

Joint Venture: No

#### 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? \* Yes

Controlling Board Number: 12345678

Controlling Board Date: 09/01/2020

Attachments

Name
Consultant_Agreement...
Signed Consultant_Agre...

Total: 2



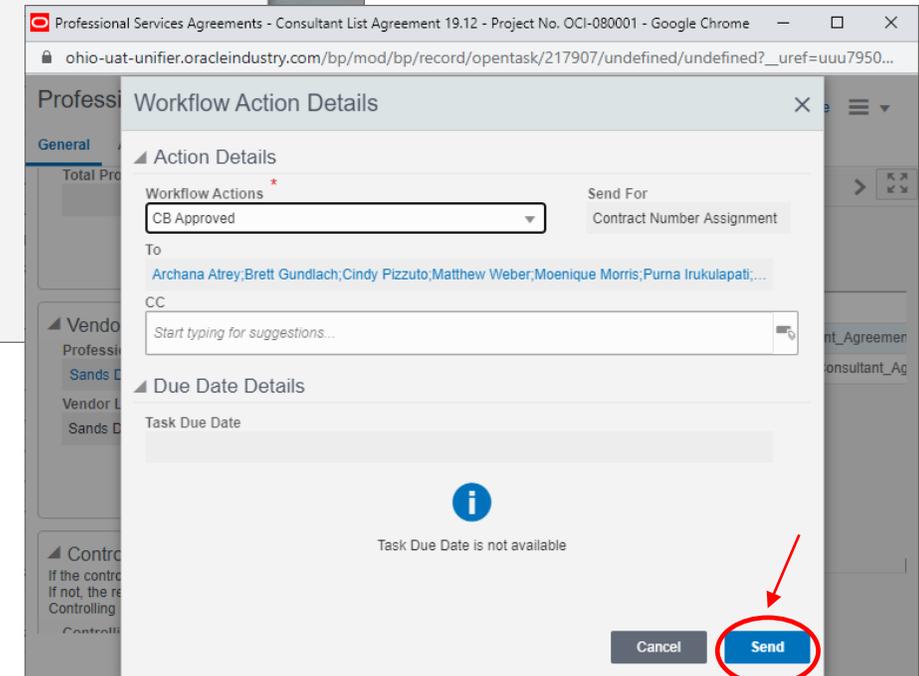
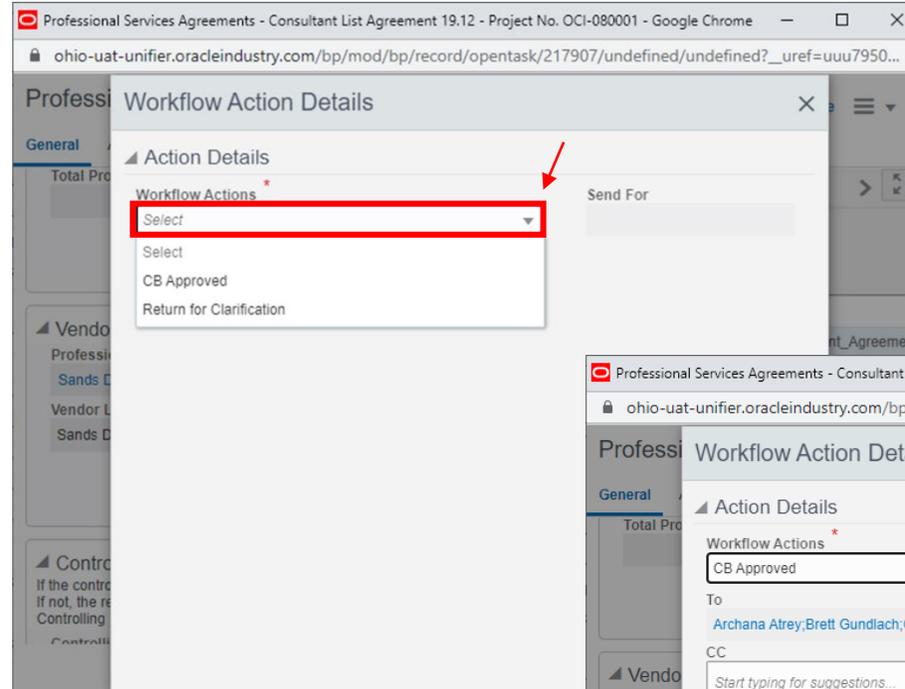
# Professional Services (Consultant) Agreement Project Manager (Controlling Board)\*

- Choose workflow action:

***If 'CB Approved' workflow action is chosen, record will go to OFCC for Contract Number Assignment***

***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



# Professional Services (Consultant) Agreement OFCC Consultant Contract Manager (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

ORACLE Primavera Unifier (Development)

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

OAKS CI Training 1 - Home Agency > OAKS CI Training > OAKS CI Training 1

Alerts uMail Collaboration Tasks Notifications Drafts Information Cost Manager Data Manager Document Manager Reports Logs

72 Hour Notice Action Items Advertisements Budget - Initial Budget - Revisions Change Order Closeout - Contractor Closeout - Professional Services Contract Contract Schedule of Values Contractor Evaluation Contractor Pay Request Design Reviews Escrow Accounts Field Reports Financial Risks Fund Allocation Fund Release Fund Transfers Liens Local Administration Authorization Requests

Tasks

+ Create Actions View Received in last 7 days

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



# Professional Services (Consultant) Agreement OFCC Consultant Contract Manager (OFCC Contract Number)

➤ 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/217916?task\_id=217916&parent\_id=0&viewOnly=0&project\_id=1006&model=u...

## Professional Services Agreements

Accept Decline

General Agreement Details

### Task Details

From: Matthew Weber

To: Archana Atrey, Brett Gundlach, Cindy Pizzuto, Matthew Weber, Moenique Morris, Purna Irukulapati, Rit...

Sent For: Contract Number Assignment

### 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:	Fee Title:

### Attachments

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

Total: 2



# Professional Services (Consultant) Agreement (OFCC Contract Number)

Check the following:

1) Does the consultant have available capacity for this project?

2) Is there a reservation for this consultant in OAKS CI?

3) Were other reservations cancelled (if needed) for any other consultants not chosen on this project?

4) Has controlling board been approved?

➤ Complete Releases block

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217916/undefined/undefined?\_uref=uuu795097779t2

### Professional Services Agreements

Send Save

General Agreement Details

**Controlling Board**  
This block contains the agency's Controlling Board information. Check the Controlling Board for approved status prior to issuing the Contract Number.

Controlling Board Approved?  
Yes

Controlling Board Number: 12345678  
Controlling Board Date: 09/01/2020

**OAKS Contract No. (Bid No.) \***: Sample Block  
**DAS Release and Permit**: Sample

**Maximum Contract Amount \***: 50,000.00  
**Release & Permit Amount**: 50,000.00

**Agreement Conditions**

Change Order Fee Percentage: 0  
Change Order Fee Allowance (\$): 0.00  
Minimum Cnstr. Administration of hours/wk: 0

Agreement Type: Design  
Other Description:

**Attachments**  
Published Attachments

Name
Consultant_Agreement_...
Signed Consultant_Agre...

Total: 2



# Professional Services (Consultant) Agreement Consultant Contract Manager (Submit to Consultant)

Once complete:

- 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**

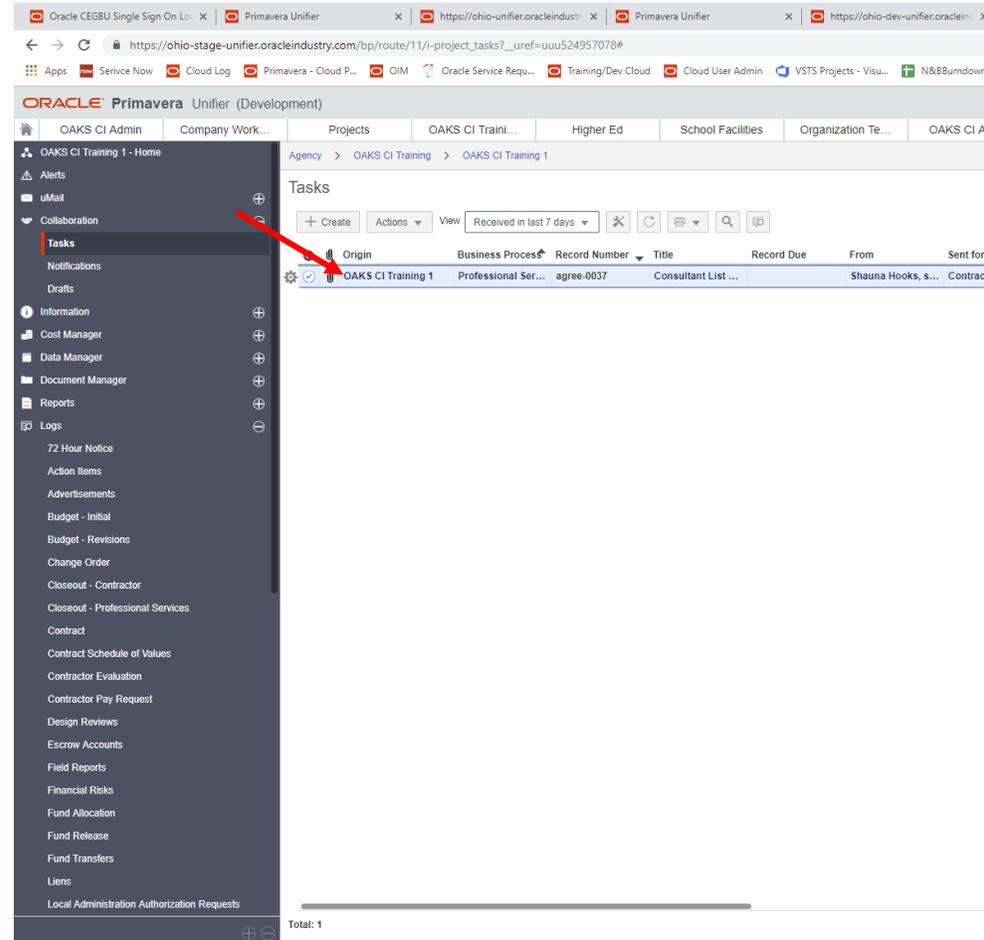
The image displays two screenshots of a web application interface for 'Professional Services Agreements - Consultant List Agreement 19.12 - Project No. OCI-0...'. The top screenshot shows the 'Workflow Action Details' dialog box with the 'Workflow Actions' dropdown menu open, highlighting 'Contract Number Issued'. The bottom screenshot shows the same dialog box with the 'Send For' field set to 'Funding Certification' and the 'Send' button highlighted.

# Professional Services (Consultant) Agreement 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 displays the URL: [https://ohio-stage-unifier.oracleindustry.com/bp/route/11/i-i-project\\_tasks?\\_uref=uuu524957078#](https://ohio-stage-unifier.oracleindustry.com/bp/route/11/i-i-project_tasks?_uref=uuu524957078#). The application title is "ORACLE Primavera Unifier (Development)". The navigation menu on the left includes "OAKS CI Training 1 - Home", "Alerts", "uMail", "Collaboration", "Tasks", "Notifications", "Drafts", "Information", "Cost Manager", "Data Manager", "Document Manager", "Reports", "Logs", "72 Hour Notice", "Action Items", "Advertisements", "Budget - Initial", "Budget - Revisions", "Change Order", "Closeout - Contractor", "Closeout - Professional Services", "Contract", "Contract Schedule of Values", "Contractor Evaluation", "Contractor Pay Request", "Design Reviews", "Escrow Accounts", "Field Reports", "Financial Risks", "Fund Allocation", "Fund Release", "Fund Transfers", "Liens", and "Local Administration Authorization Requests". The main content area shows a "Tasks" table with columns: "Origin", "Business Process", "Record Number", "Title", "Record Due", "From", and "Sent for". A red arrow points to the "Tasks" menu item in the left navigation pane. The table contains one record: "OAKS CI Training 1", "Professional Ser...", "agree-0037", "Consultant List ...", "Shauna Hooks, s...", and "Contrac". The total number of records is "Total: 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	Comments	Linked Records
Published Attachments		
<input checked="" type="checkbox"/> Consultant_Agreement...		
<input checked="" type="checkbox"/> Signed Consultant_Agre...		

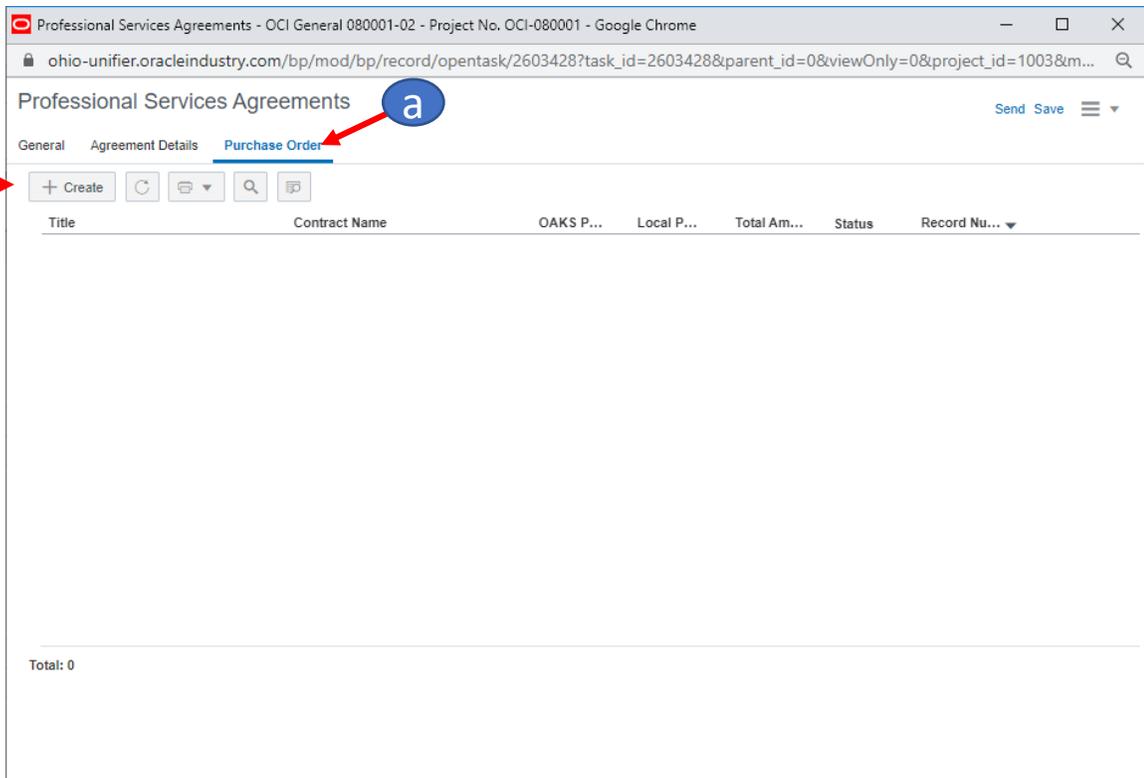
Total: 2



# 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



The screenshot shows a web browser window titled "Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2603428?task\_id=2603428&parent\_id=0&viewOnly=0&project\_id=1003&m...". The page header displays "Professional Services Agreements" with "Send Save" and a menu icon. Below the header are tabs for "General", "Agreement Details", and "Purchase Order". A red arrow labeled "a" points to the "Purchase Order" tab. Below the tabs is a toolbar with a "+ Create" button, a refresh icon, a dropdown menu, a search icon, and a print icon. A red arrow labeled "b" points to the "+ Create" button. Below the toolbar is a table with columns: "Title", "Contract Name", "OAKS P...", "Local P...", "Total Am...", "Status", and "Record Nu...". The table is currently empty. At the bottom left of the table area, it says "Total: 0".



# 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

Browser: Create New Purchase Orders - Project No. OCI-080001 - Google Chrome  
URL: 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
Project Number OCI-080001	Creator Matthew Weber
Project Name Agency General Projects Test	Creation Date
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.	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.	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". A "Submit Save" button is visible in the top right corner. The "General" tab contains a "PO Details" section with the instruction "The OAKS PO No. should be a 10 digit number ex. 0000007825". The form fields are as follows:

Field	Value
OAKS PO No.	
OAKS PO Amount (\$)	176,000.00
OAKS PO Date	MM/DD/YYYY HH:MM AM
Date Dispatched	MM/DD/YYYY HH:MM AM
Created by Integration	Select
Local PO No.	
Local PO Amount (\$)	0.00
Local PO Date	

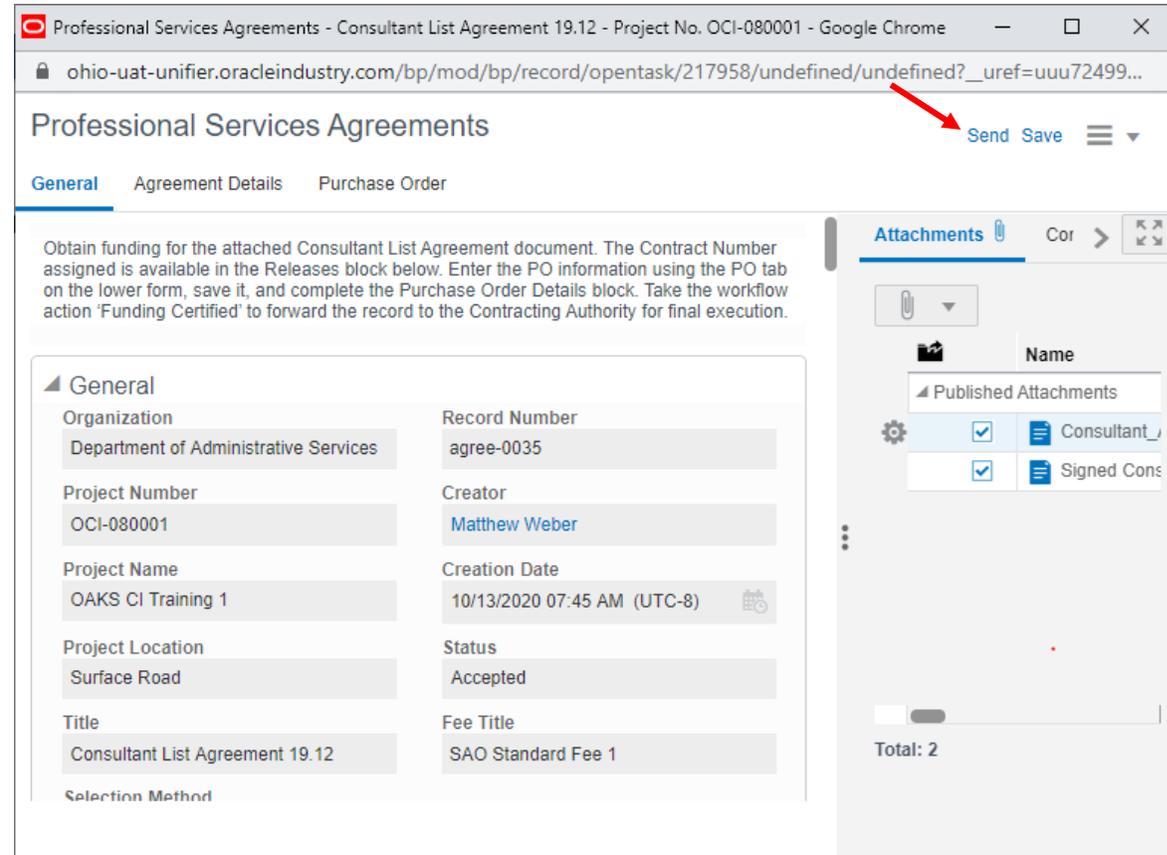
Annotations: A blue circle with the letter 'h' points to the "General" tab. A blue circle with the letter 'i' points to the "OAKS PO Amount (\$)" field, which contains the value "176,000.00". A blue circle with the letter 'j' points to the "Submit Save" button.



# 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

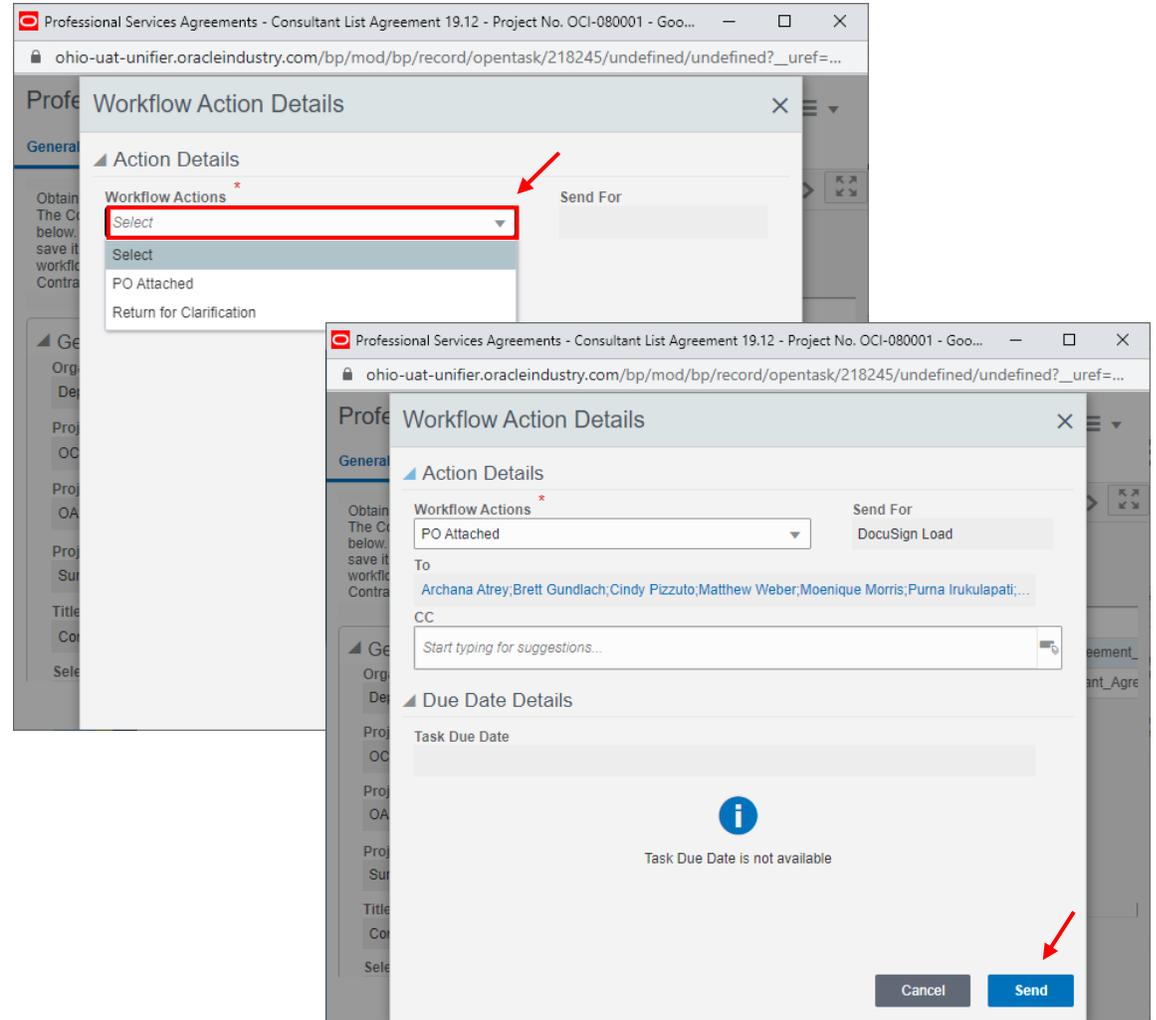
Name
Published Attachments
Consultant_
Signed Cons

Total: 2



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

- Choose: Workflow Action
  - ***If you choose 'PO Attached', record will go to Project Coordinator for DocuSign Load***
  - ***If you choose 'Return for Clarification', record will be returned to Project Coordinator for update***
- Click Send



# Professional Services (Consultant) Agreement Project Coordinator (Final Document Load)

Project 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#](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 main content area is titled "Tasks" and features a table with columns: Origin, Business Process, Record Number, Title, Record Due, From, and Sent for. A single record is visible, with "OAKS CI Training 1" highlighted in blue. A red arrow points to the "OAKS CI Training 1" record in the table. Another red arrow points to the "Tasks" menu item in the left-hand navigation sidebar. The bottom of the page shows "Total: 1".

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

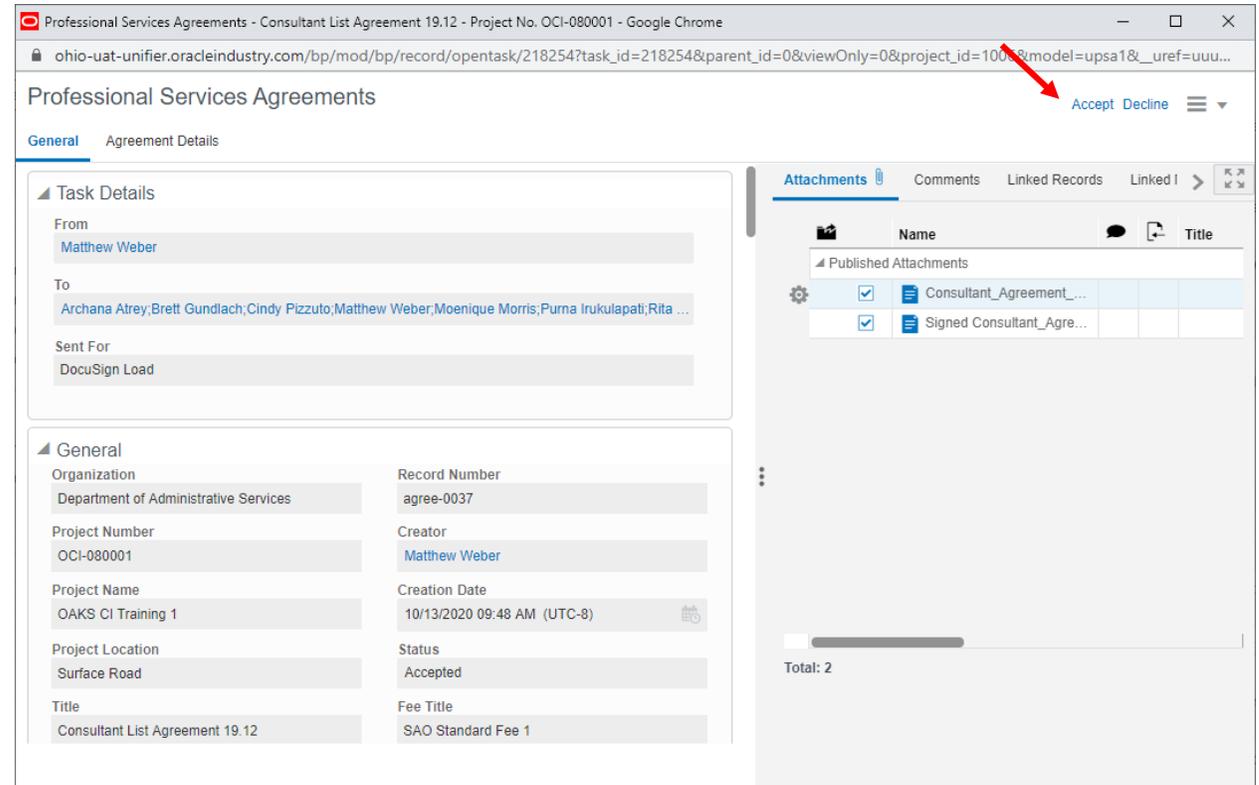


# Professional Services (Consultant) Agreement

## Project Coordinator (Final Document Load Submit to Project Manager)

➤ Click: **Accept**

- Download DocuSign executed Agreement
- Agreement must be signed by Attorney General, obtain AG signature
- Attach **FULLY** executed Agreement document and all necessary supporting documents



The screenshot displays a web application interface for managing Professional Services Agreements. The browser address bar shows the URL: `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218254?task_id=218254&parent_id=0&viewOnly=0&project_id=10008&model=upsa1&_uref=uuu...`. The page title is "Professional Services Agreements" and it includes "Accept" and "Decline" buttons. The main content is divided into sections: "Task Details", "General", and "Attachments".

**Task Details:**

- From: Matthew Weber
- To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Matthew Weber; Moenique Morris; Purna Irukulapati; Rita ...
- Sent For: DocuSign Load

**General:**

Organization	Department of Administrative Services	Record Number	agree-0037
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	10/13/2020 09:48 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

## Project Coordinator (Final Document Load Submit to Project Manager)

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**

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...

Attachments Comments

Browse... Document Manager... Consultant\_Agreement\_... Signed Consultant\_Agre...

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 (U...  
Project Location: Surface Road  
Status: Pending  
Title: Consultant List Agreement 19.12  
Fee Title: SAO Standard Fee 1  
Selection Method: OFCC Architect/Engineer FY 20-21  
Delivery Method: Consulting Only  
EDGE Waiver: Yes  
Total Project Cost \$: ...  
EDGE Goal Percent: ...

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

Total: 2

Copy Comments

Cancel Select



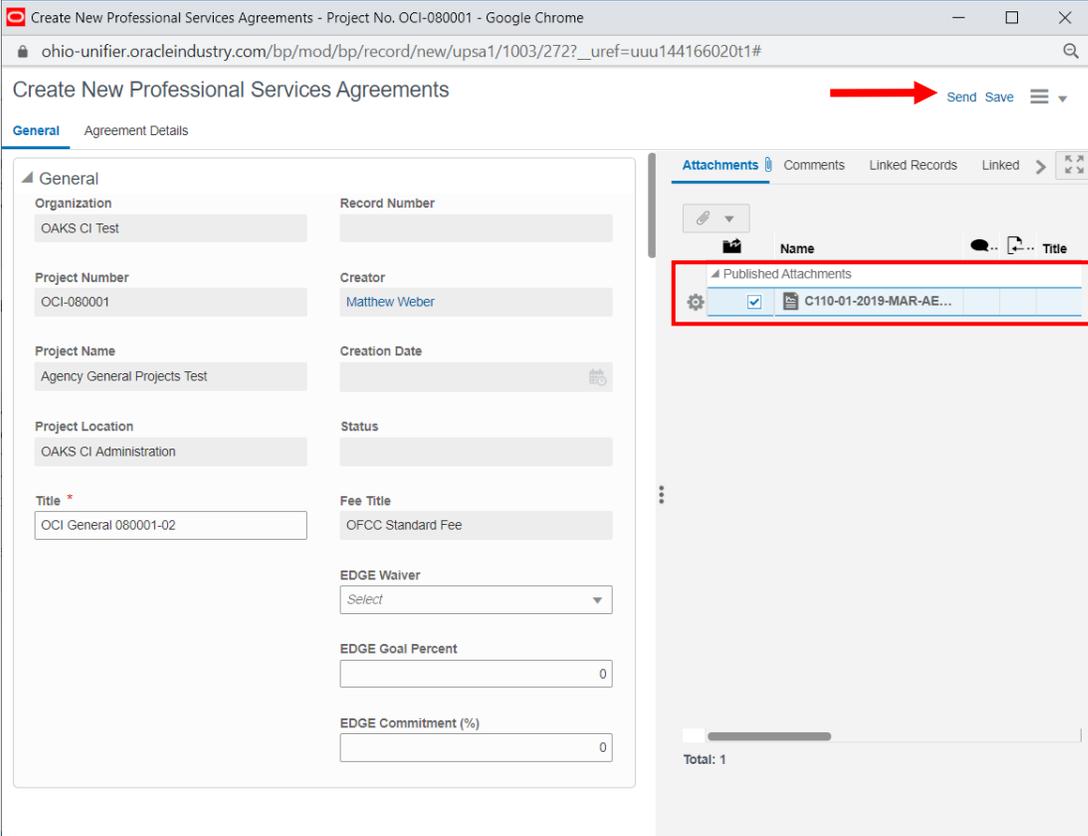
# Professional Services (Consultant) Agreement

## Project Coordinator (Final Document Load Submit to Project Manager)

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

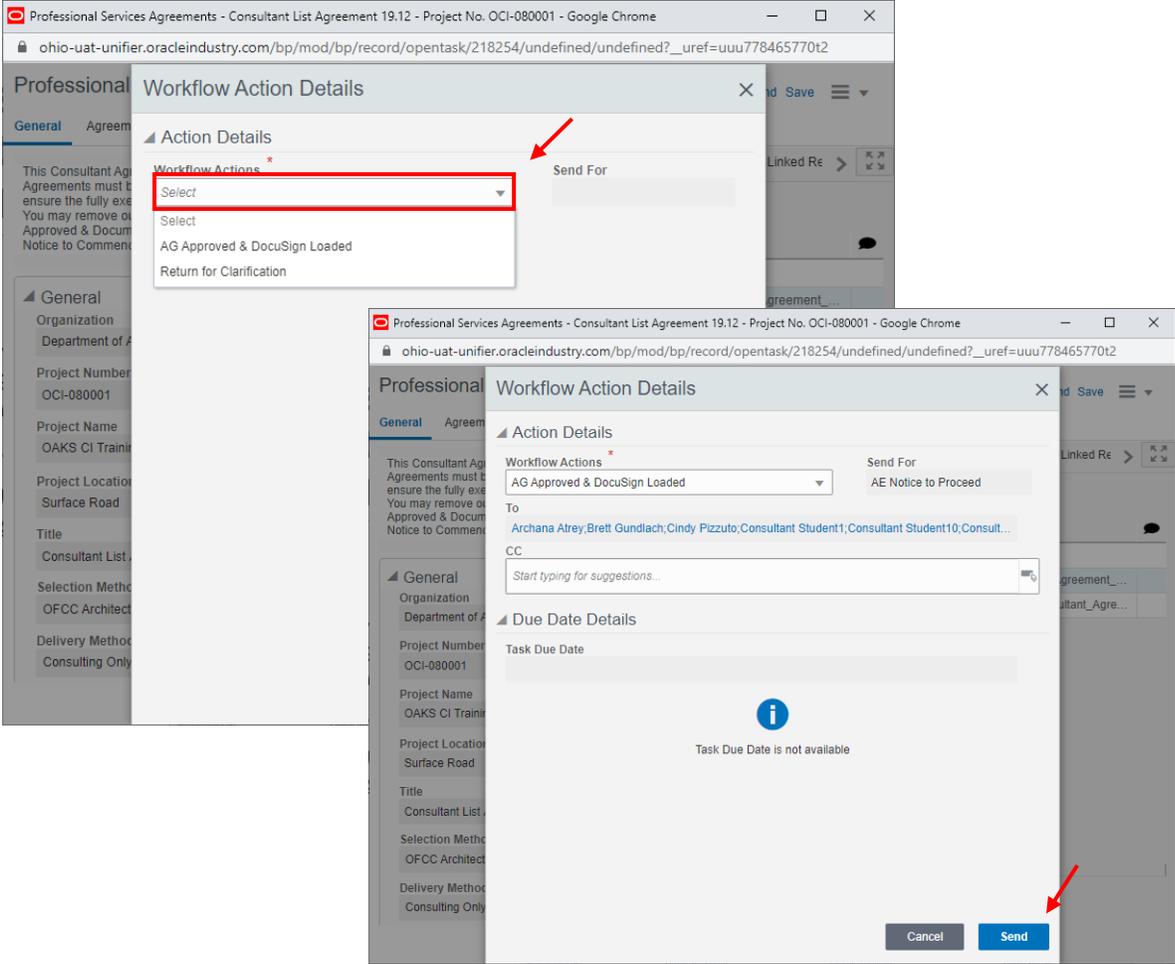
Name	Title
C110-01-2019-MAR-AE...	[ ]

Total: 1



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

- Choose workflow action: **AG Approved and DocuSign Loaded**
- Click: Send
- **The record will now go to the Project Manager for “Notice to Proceed”**

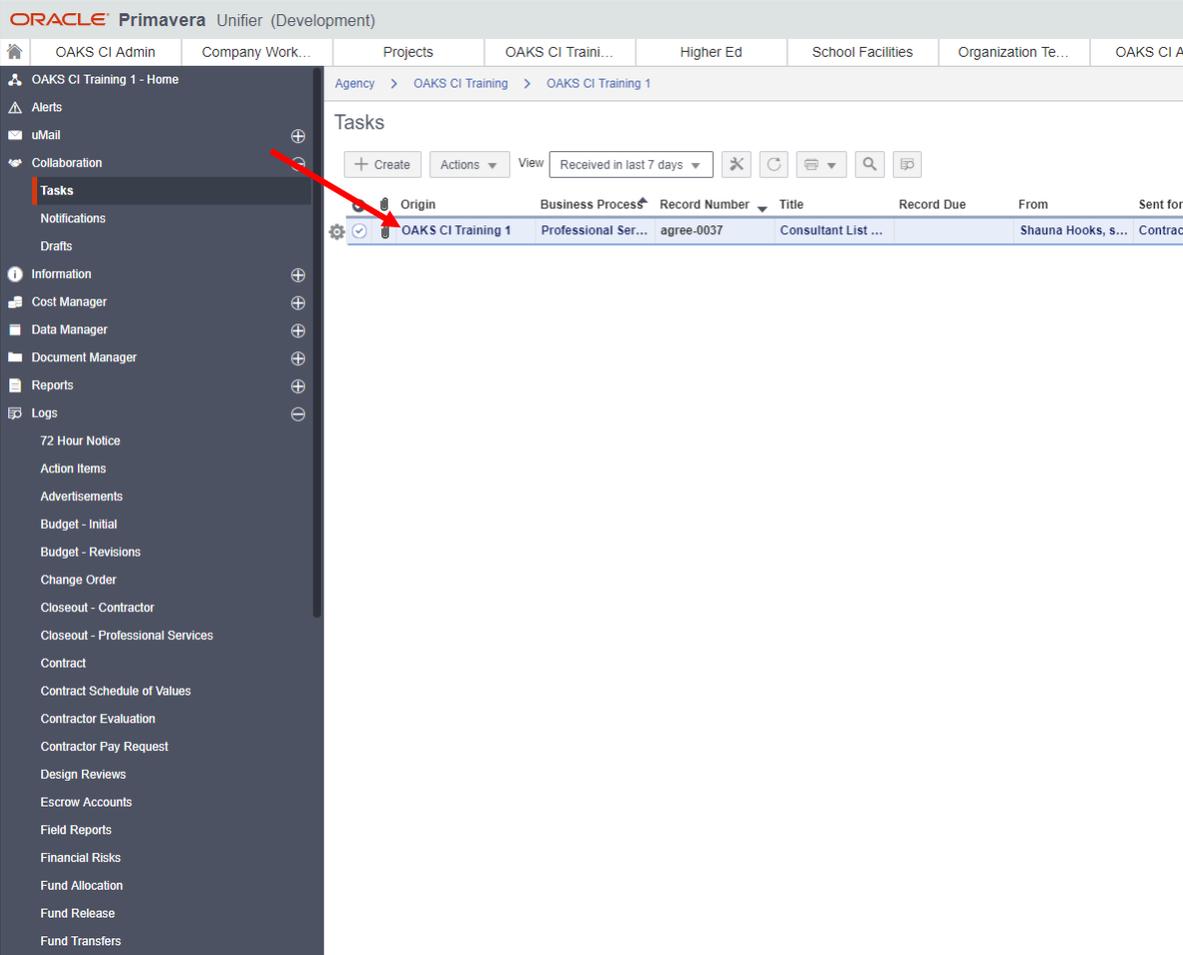


# Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

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

Click the link in the email or :

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



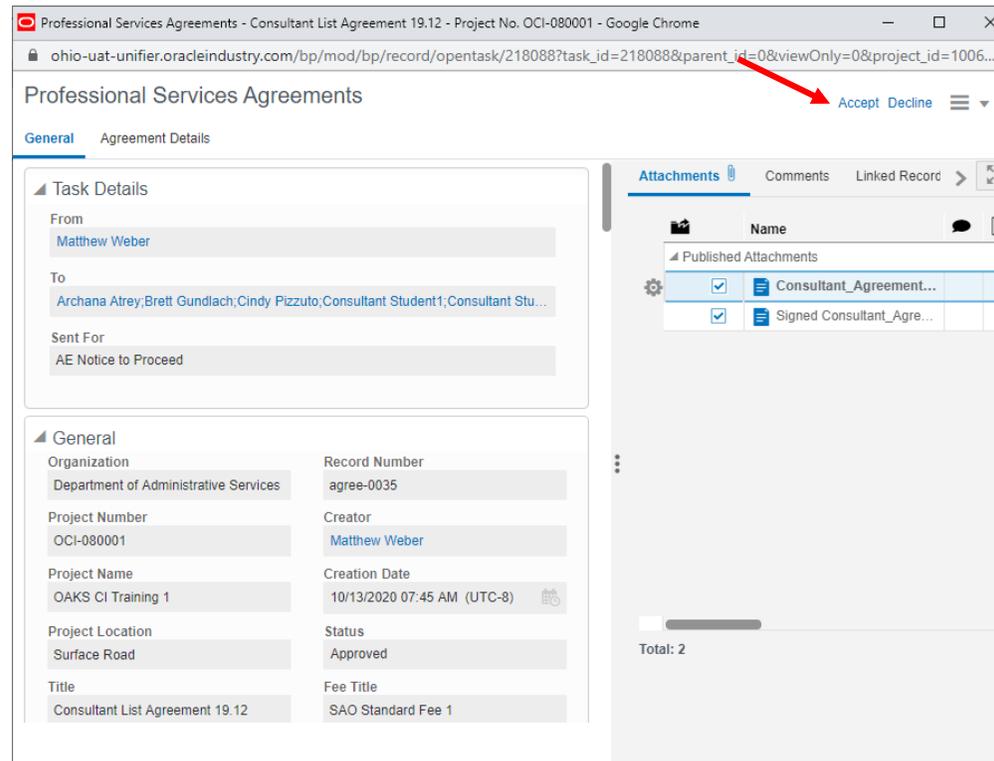
The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'OAKS CI Admin', 'Company Work...', 'Projects', 'OAKS CI Traini...', 'Higher Ed', 'School Facilities', 'Organization Te...', and 'OAKS CI Ar'. The left sidebar shows a navigation menu with categories like Alerts, uMail, Collaboration, Tasks, Notifications, Drafts, Information, Cost Manager, Data Manager, Document Manager, Reports, and Logs. The main area shows a 'Tasks' list with columns for Origin, Business Process, Record Number, Title, Record Due, From, and Sent for. A red arrow points to the first record: 'OAKS CI Training 1' with Business Process 'Professional Ser...', Record Number 'agree-0037', Title 'Consultant List ...', Record Due 'Shauna Hooks, s...', and Sent for 'Contrac'.

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 Project Manager (Notice to Commence Services)

➤ 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/218088?task\_id=218088&parent\_id=0&viewOnly=0&project\_id=1006...

### Professional Services Agreements

[Accept](#) [Decline](#) ☰

**General** Agreement Details

#### Task Details

From: [Matthew Weber](#)

To: [Archana Atrey](#); [Brett Gundlach](#); [Cindy Pizzuto](#); [Consultant Student1](#); [Consultant Stu...](#)

Sent For: AE Notice to Proceed

#### General

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

#### Attachments

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

Total: 2



# Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

- Review attached documents, ensure that all signatures have been acquired

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218088/undefined/undefined?\_uref=uuu724998076t2

### Professional Services Agreements

Send Save

General Agreement Details Purchase Order

This consultant list agreement document has been executed. Issue the AE Notice to Proceed to begin work.

**Attachments** Comments Link

Published Attachments

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

Total: 2

**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	Approved
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
100,000.00	0



# Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

Once record is complete:

- a) Click the Menu at the top right of the record
- b) Click **Print**
- c) Select **Custom**

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/open/upsa1/3226/0/0?srcid=3226&model=upsa1&fromcostlog=1&pr...`. The page title is "Professional Services Agreements". The record details are as follows:

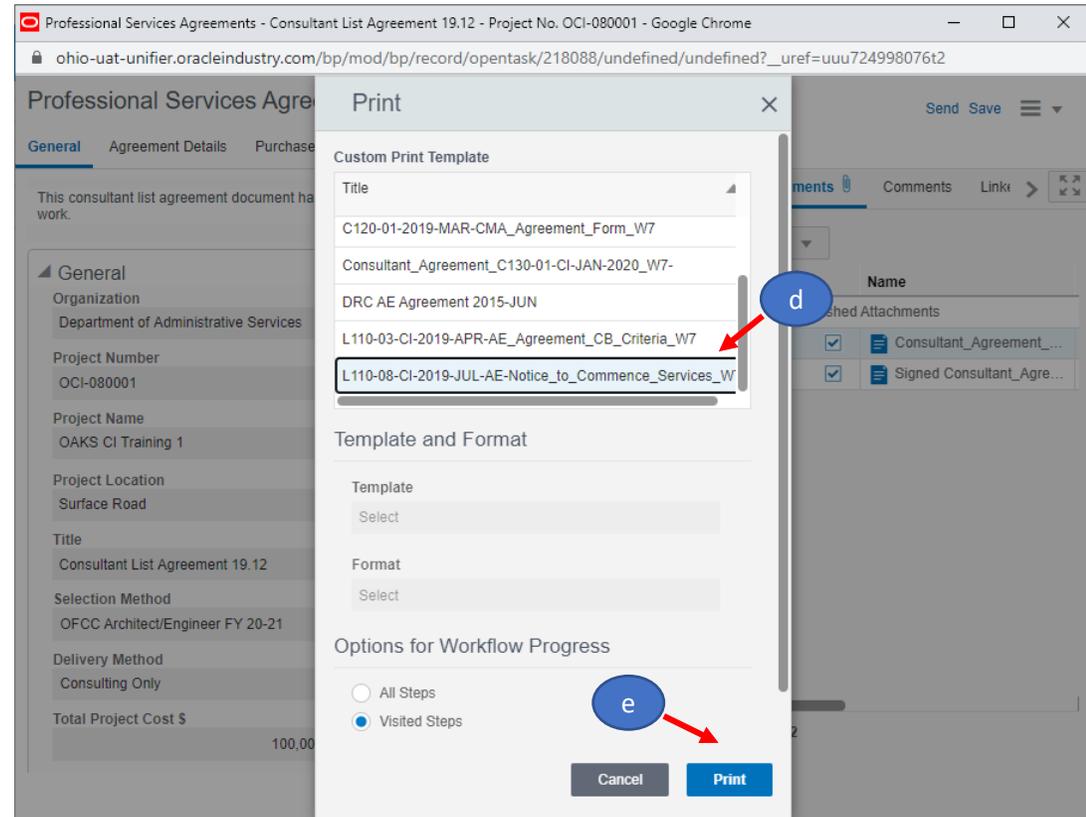
Field	Value
Organization	OAKS CI Test
Record Number	Agree-0024
Project Number	OCI-080001
Creator	Matthew Weber
Project Name	Agency General Projects Test
Creation Date	04/14/2020 02:55 PM (UTC-5)
Project Location	OAKS CI Administration
Status	Pending
Title	OCI General 080001-02
Fee Title	OFCC Standard Fee

The menu at the top right contains the following options: Send, Save, Export Line Item Template, Print, Reload, Review, Terminate Record, Transfer Ownership..., Undo Accept Task, Help, and Close. The Print option is highlighted, and its submenu is open, showing HTML..., PDF..., and Custom... options.



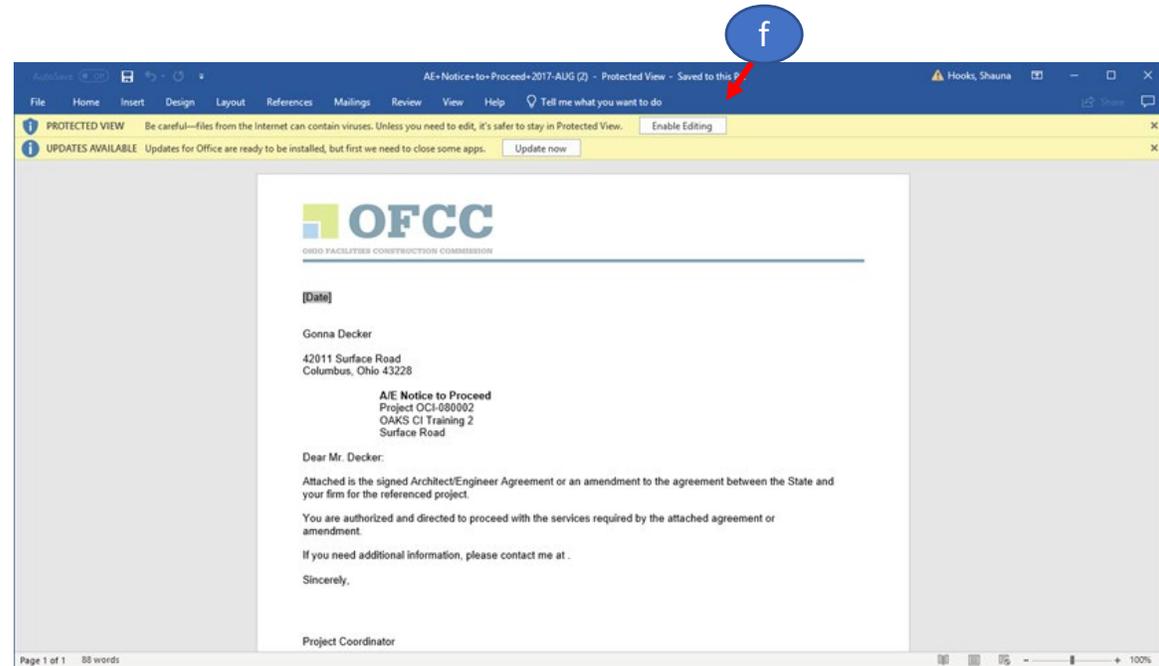
# Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

- d. Select: **AE Notice to Commence Services**
- e. Click : **Print**



# Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

- f. Open downloaded form, Click Enable editing
  - ▶ Make updates as necessary
  - ▶ Save Document to computer
  - ▶ Attach Document to Record



# Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

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**

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...

Attachments Comments

Browse... Document Manager... Consultant\_Agreement\_... Signed Consultant\_Agre...

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 (U...)  
Project Location: Surface Road  
Status: Pending  
Title: Consultant List Agreement 19.12  
Fee Title: SAO Standard Fee 1  
Selection Method: OFCC Architect/Engineer FY 20-21  
Delivery Method: Consulting Only  
EDGE Waiver: Yes  
Total Project Cost \$: ...  
EDGE Goal Percent: ...

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

Total: 2

Copy Comments

Cancel Select



# Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

The Document 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**

The screenshot displays the 'Professional Services Agreements' interface in a web browser. The browser title is 'Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604200/undefined/undefined?\_\_uref=uuu76683709t1'. The page title is 'Professional Services Agreements'. The main navigation tabs are 'General', 'Agreement Details', and 'Purchase Order'. The 'General' tab is active, showing a form with the following fields:

Organization	Record Number
OAKS CI Test	Agree-0024
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	04/14/2020 02:55 PM (UTC-5)
Project Location	Status
OAKS CI Administration	Approved
Title	Fee Title
OCI General 080001-02	OFCC Standard Fee
Selection Method	EDGE Waiver
Competitive Selection	
	EDGE Goal Percent
	0

The right-hand side of the interface shows the 'Attachments' tab, which is highlighted with a red box. It contains a table of published attachments:

	Name				
Published Attachments					
<input checked="" type="checkbox"/>	C110-01-2019-MAR-AE_...				
<input checked="" type="checkbox"/>	test view.txt				

At the top right of the page, there are buttons for 'Send' and 'Save', with a red circle around the 'Send' button and a red arrow pointing to it. The 'Total: 2' is displayed at the bottom of the attachments list.



# Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

- ▶ Verify Workflow
- ▶ Use the **CC** field to carbon copy other users in the project
- ▶ Click **Send** to Distribute
- ▶ ***The record will now end***

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218088/undefined/undefined?\_uref=uuu724998076t2

### Workflow Action Details

General

This consultant Proceed to beg

Workflow Actions \*  
Distribute

Send For  
End

CC  
Start typing for suggestions...

Cancel Send

# Professional Services (Consultant)

## Pay Requests

*Create and Review*



# Professional Services (Consultant) Pay Request Purpose and Procedure

- ▶ Provides for the submission, review, and approval of interim or final payment requests for services completed by the consultant
- ▶ References and relates directly to the schedule of values (SOV) line item amounts as outlined in the Consultant's Agreement
- ▶ ***Important reminder to all Consultants: Pay Request's which were previously created and approved in the SFC -999 project, must now be created and approved in the Local Project***
- ▶ Workflow:
  - ▶ You will continue to use the current workflow currently in place in your Locally Administered projects



# Professional Services (Consultant) Pay Request Consultant - Creation

## ▶ Consultant/AE:

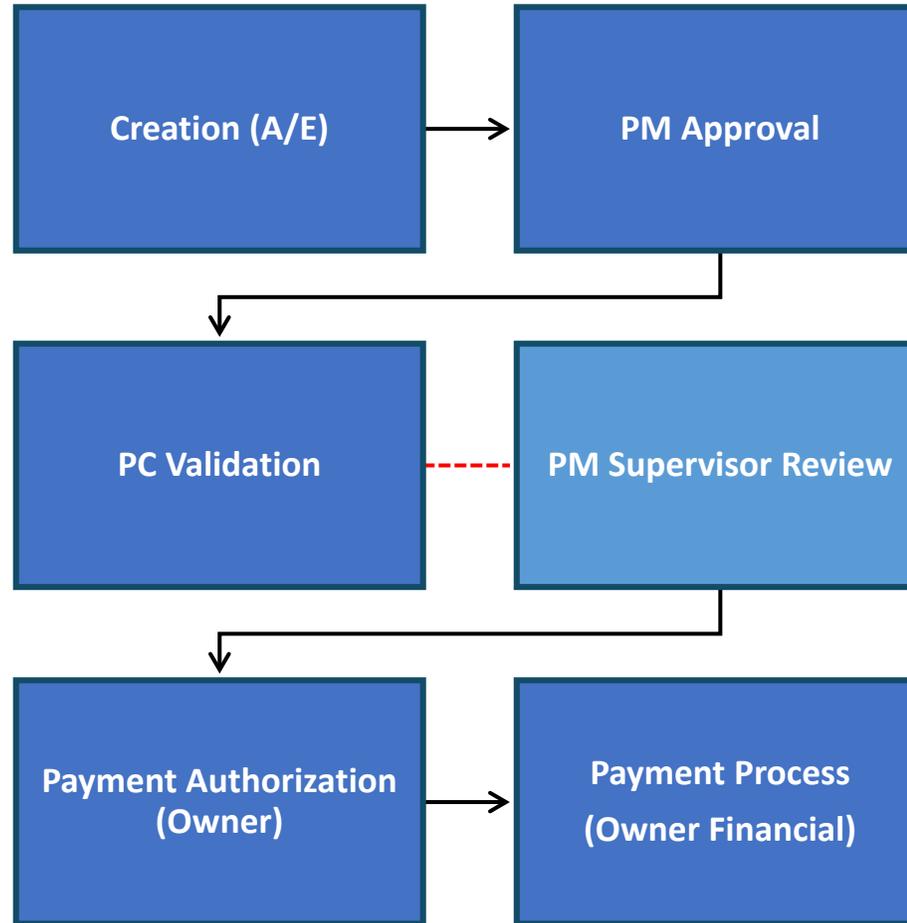
- ▶ Create the Professional Services (Consultant) (Consultant) Pay Request
- ▶ Submit the Pay Request for Approval
- ▶ **Note:** Any documents that must be attached to the pay request must be uploaded into Document Manager first
  - ▶ For information on Document Manager, please refer to the Job Aid located at the OFCC website, [ofcc.ohio.gov](http://ofcc.ohio.gov)



# Professional Services Pay Request

## ▶ Workflow Steps

- \* PM Supervisor Review step only occurs when this pay request represents Final Payment. Otherwise Continue to the Payment Authorization step.



*Click the boxes to navigate directly to each section*



# **Subcontractor/Supplier Declaration Review Validation (PC)**



# Professional Services Pay Request Creation (A/E)

## ▶ 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 interface for projects. A search bar at the top contains the text "DPS". Below the search bar, a dropdown menu is open, showing a list of projects. The projects are listed in a table with columns for Name, Number, and Location. A red box highlights a "+" sign in the top right corner of the dropdown menu, and a red arrow points from this sign to the search bar. Another red arrow points from the search bar to the first project in the list.

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



# Professional Services Pay Request – Create (A/E)

- ▶ In OAKS CI navigate to:
  - ▶ Logs -> **Professional Services Pay Request**
  - ▶ Click **Create**

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with 'Logs' circled in red. The main content area displays 'Professional Services Pay Request' with a '+ Create' button also circled in red. A red arrow points to the 'Professional Services Pay Request' item in the sidebar. The main content area shows a table with columns 'Title' and 'Agreement Name'.

Title	Agreement Name
Tuesday Test	CI Agreement
Test vendor name change	Test Agreement
Test PS Pay Request	CI Agreement
test 8	CI Agreement
test	Agreement w int
test	Agreement #3
Test	Agreement #3
pr#3	test#2
PR#2	test#2
PR #4	Agreement w int
PR #1	test#2
Migration 1	Migration 2



# Professional Services Pay Request – Create (A/E)

a) Enter the required \* fields in the General section

- ▶ Enter the Title
- ▶ Select Contract Reference
- ▶ Select Period From and Period To

a

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?\_uref=uuu184516673t1

### Create New Professional Services Pay Request

Send Save

General Pay Request Details

General

Organization  
OAKS CI Test

Project Number  
OCI-080001

Project Name  
Agency General Projects Test

Project Location  
OAKS CI Administration

Record Number

Creator  
Matthew Weber

Creation Date

Status

Title \*  
Matt's Consulting OCI-00081\_PR1

Internal Ref. Number

Contract Reference \*  
mmw-test new workflow

Professional Services Provider  
OCI Test General

Agreement Type  
Design

EDGE Certified?  
No

Other Description

Received Date

Period From \*  
04/01/2020 05:00 PM (UTC-5)

Period To \*  
04/30/2020 05:00 PM (UTC-5)

Payment Requested

Final Payment? \*  
Select

Amount (\$) \*  
0.00

Invoices for Reimbursable Exp. Attached? \*  
Select

Line Item Total (\$)  
0.00

Difference (\$)  
0.00



# Professional Services Pay Request – Create (A/E)

- b) Enter the required \* fields in the Payment Requested section
- ▶ Final Payment
    - ▶ Select Yes if this is the final pay request for this agreement
  - ▶ Invoices for Reimbursable Exp. Attached?
    - ▶ Select Yes if invoices are attached
  - ▶ Amount (\$)
    - ▶ Enter the amount of the current payment request

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?\_uref=uuu184516673t1

Create New Professional Services Pay Request Send Save

General Pay Request 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 \*: Matt's Consulting OCI-00081\_PR1  
Internal Ref. Number:   
Contract Reference \*: mmw-test new workflow  
Professional Services Provider: OCI Test General  
Agreement Type: Design  
EDGE Certified?: No  
Other Description:   
Received Date:   
Period From \*: 04/01/2020 05:00 PM (UTC-5)  
Period To \*: 04/30/2020 05:00 PM (UTC-5)

**Payment Requested**

Final Payment? \*: No  
Amount (\$) \*: 25,000.00  
Invoices for Reimbursable Exp. Attached? \*: No  
Line Item Total (\$) : 0.00  
Difference (\$) : 25,000.00



# Professional Services Pay Request – Create (A/E)

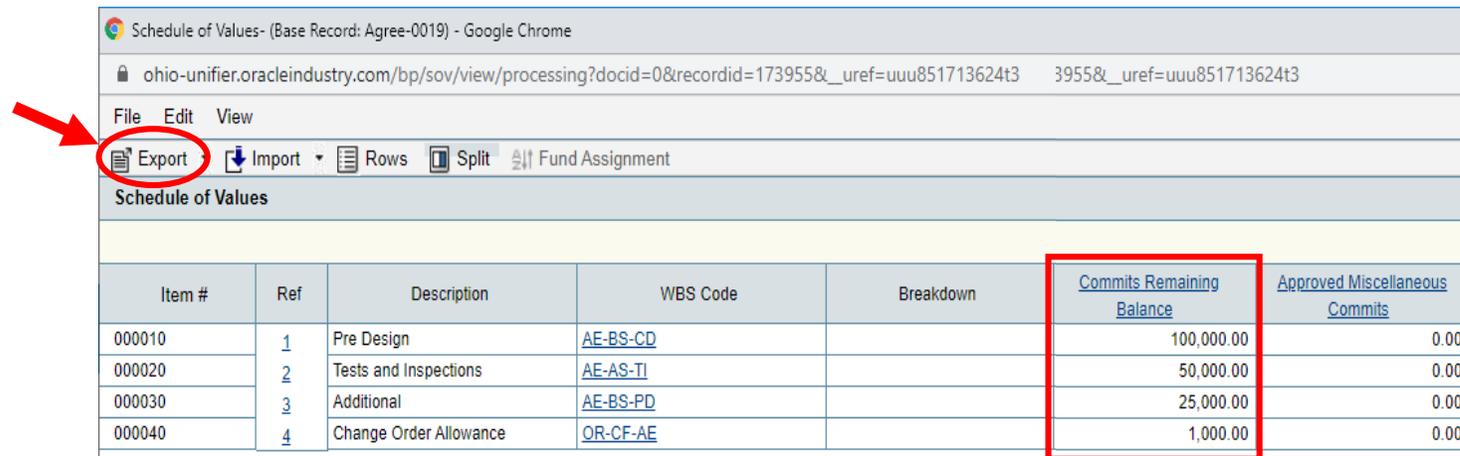
- ▶ Prior to adding lines to your pay request, you may want to view the remaining balance on your SOV (Schedule of Values)
  - ▶ Click the Menu at the top right of the record and select **SOV**

The screenshot shows a web browser window titled "Create New Professional Services Pay Request - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?\_uref=uuu184516673t1". The page title is "Create New Professional Services Pay Request". There are two tabs: "General" (selected) and "Pay Request Details". In the top right corner, there is a "Send Save" button and a menu icon (three horizontal lines) circled in red. A red arrow points from the menu icon to the "SOV" option in the dropdown menu. The dropdown menu also includes "Export Line Item Template", "Print", "Reload", "Review ...", "Help", and "Close". The form fields are as follows:

General	Pay Request Details
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 * Matt's Consulting OCI-00081_PR1	Internal Ref. Number
Contract Reference * mmw-test new workflow	Professional Services Provider OCI Test General
Agreement Type Design	EDGE Certified? No
Other Description	Received Date

# Professional Services Pay Request – Create (A/E)

- ▶ This allows you to look at the Scheduled Value and Commits Remaining Balance for each of the line items on your SOV (you may need to scroll to the right to find the column)
- ▶ You can also export the SOV to Excel by clicking Export and choosing the Summary Schedule of Values Sheet



Screenshot of a web browser showing a Schedule of Values (SOV) table. The browser address bar shows the URL: [ohio-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=173955&\\_uref=uuu851713624t3](https://ohio-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=173955&_uref=uuu851713624t3). The browser title is "Schedule of Values - (Base Record: Agree-0019) - Google Chrome".

The table displays the following data:

Item #	Ref	Description	WBS Code	Breakdown	Commits Remaining Balance	Approved Miscellaneous Commits
000010	1	Pre Design	<a href="#">AE-BS-CD</a>		100,000.00	0.00
000020	2	Tests and Inspections	<a href="#">AE-AS-TI</a>		50,000.00	0.00
000030	3	Additional	<a href="#">AE-BS-PD</a>		25,000.00	0.00
000040	4	Change Order Allowance	<a href="#">OR-CF-AE</a>		1,000.00	0.00



# Professional Services Pay Request – Create (A/E)

- ▶ This is how your SOV will look in Excel
- ▶ **Note:** This file is for reference only. It cannot be re-imported into OAKS CI.

Column: All

Note: This file is for reference only. The contents of this file cannot be modified and re-imported into the Schedule of Value Sheet.

Ref	Description	WBS Code Breakdown	Pending	Pending	Approved Professional	Approved Amended	Total	Approved Pending	Commits Remaining
1	Pre Design	AE-BS-CD	0	0	100,000.00	0	100,000.00	0	100,000.00
2	Tests and Inspections	AE-AS-TI	0	0	50,000.00	0	50,000.00	0	50,000.00
3	Additional	AE-BS-PD	0	0	25,000.00	0	25,000.00	0	25,000.00
4	Change Order Allowance	OR-CF-AE	0	0	1,000.00	0	1,000.00	0	1,000.00



# Professional Services Pay Request – Create (A/E)

- ▶ Enter a line item corresponding to each item on the Schedule of Values (SOV) from the agreement for which payment is requested

- a) Open the Pay Request Details tab
- b) Click the Add button



# Professional Services Pay Request – Create (A/E)

- c) Click on the arrow next to WBS Code
- d) Choose the appropriate line item
- e) Enter a Short Description and the Amount
- f) To add additional lines, click **Save & Add New**, otherwise click **Save**

SOV Picker

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
000050	5	Additional Services	AE-AS-BE

Line Item Details

General

WBS Code \*  
AE-BS-CD

Code Name  
AE Construction Docs Services

Short Description \*  
Services

Professional Services EDGE Certified?  
No

Amount (\$) \*  
10,000.00

Subcontractor/Supplier  
Type a Subcontractor/Supplier...

EDGE Certified?

Subcontractor/Supplier Name

Notes

Total Amount  
Total: 0

Cancel Save Save & Add New



# Professional Services Pay Request – Create (A/E)

- g) Once all lines have been added, the Line Item information will display
- h) Note the Total Amount field at the bottom of the record

The screenshot shows the 'Create New Professional Services Pay Request' interface. The 'Pay Request Details' tab is selected, displaying a table of line items. A red box highlights the table, and a blue circle with the letter 'g' is positioned to its left. At the bottom of the record, the 'Total Amount' field is highlighted with a red box, and a blue circle with the letter 'h' is positioned to its left. The 'Line Item Details' panel on the right shows the 'General' section with fields for 'WBS Code', 'Code Name', 'Short Description', 'Professional Services EDGE Certified?', and 'Amount (\$)'. The 'Total Amount' field shows a value of 25,000.00.

No.	WBS Code	Code Name	Short Description
003	AE-AS-BE	AE Additional Services Bu...	Additional Services
002	AE-AS-TI	AE Tests and Inspections	Inspections
001	AE-BS-CD	AE Construction Docs Services	Services

Total: 3

Total Amount : 25,000.00



# Professional Services Pay Request – Create (A/E)

- ▶ Open the General tab and scroll down to the Payment Requested Section
- ▶ Ensure that the Total Amount displayed from the Pay Request Details tab equals the Amount entered in the Payment Requested section, and the Difference equals \$0.00

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?\_uref=uuu184516673t1

### Create New Professional Services Pay Request

Send Save

**General** Pay Request Details

▶ General

▶ **Payment Requested**

Final Payment? \*  
No

Amount (\$) \*  
25,000.00

Invoices for Reimbursable Exp. Attached? \*  
No

Line Item Total (\$)  
25,000.00

Difference (\$)  
0.00

Attachments

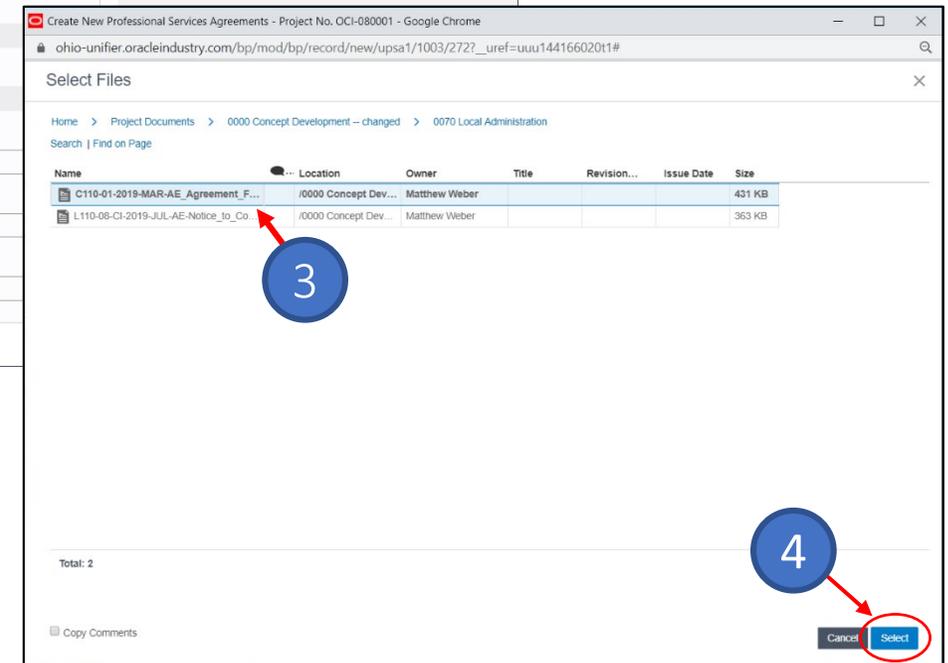
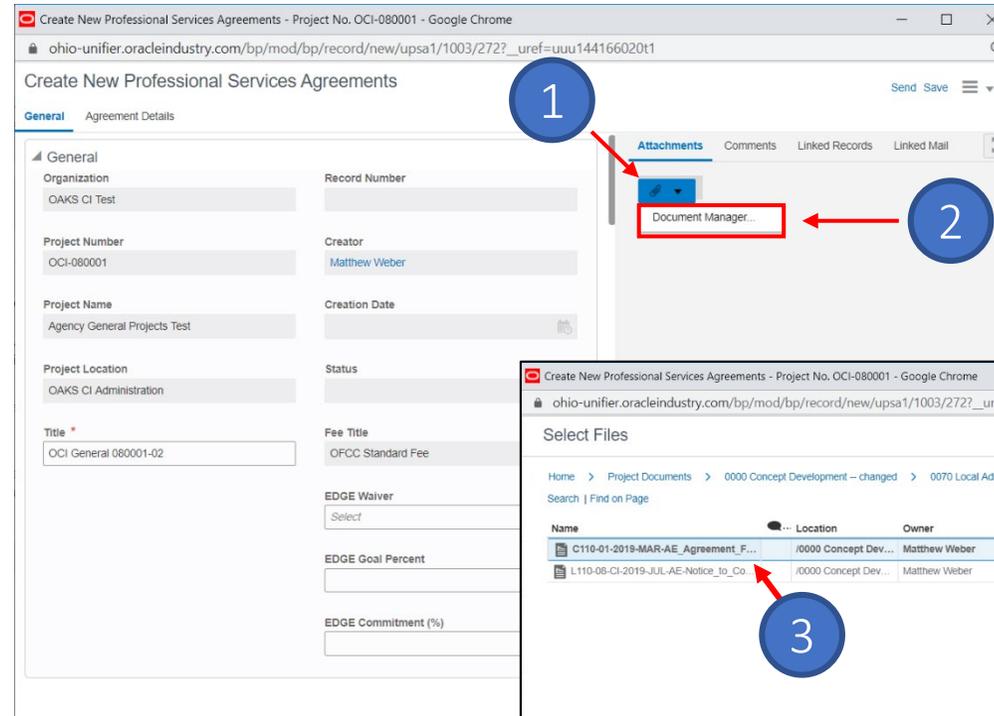
Information  
No Attachments



# Professional Services Pay Request – Attach Supporting Documentation

*Upload all documents to [Document Manager](#) prior to attaching documents*

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



# Professional Services Pay Request – Create (A/E)

**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**

The screenshot shows a web browser window titled "Create New Professional Services Pay Request - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/312376/1?\_uref=uuu418648075t1#". The page title is "Create New Professional Services Pay Request". There are "Send" and "Save" buttons, with a red arrow pointing to the "Send" button. The "General" tab is selected, showing fields for Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Title (Matt's Consulting OCI-00081\_PI), and Contract Reference (mmw-test new wor...). The "Attachments" tab is also visible, showing a list of published attachments, with one attachment "C110-01-2019-MAR-AE..." highlighted by a red box.

# Professional Services Pay Request – Create (A/E)

- ▶ Verify Workflow Action
- ▶ Click **Send**
- ▶ The record will now go to PM Approval

The screenshot shows a web browser window titled "Create New Professional Services Pay Request - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/312376/1?\_uref=uuu418648075t1#". The main form is titled "Create New P" and has a "General" tab selected. A "Workflow Action Details" dialog box is open, showing the following fields:

- Action Details**
  - Workflow Actions \*: **Submit** (highlighted with a red box)
  - Send For: PM Approval
  - To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Manager
  - CC: Start typing for suggestions...
- Due Date Details**
  - Task Due Date: [Empty field]

At the bottom of the dialog box, there is a message: "Task Due Date is not available". Below this message are two buttons: "Cancel" and "Send". A red arrow points to the "Send" button.

# **Professional Services Pay Request PM Approval**



# Professional Services Pay Request PM Approval

- ▶ PM receives an Email
- ▶ Click on the “Unifier Login” button to access the task

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: Agency General Projects Test**

**Professional Services Pay Request PSPR-0013 is sent to you for PM Approval.**

From : Matthew Weber  
Sent For : PM Approval

Source Name : Agency General Projects Test  
Record No : Professional Services Pay Request PSPR-0013  
Title : Matt's Consulting OCI-00081\_PR1

[Unifier Login](#)



# PM Approval

- ▶ Click Accept to begin work on the task

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081\_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606573?task\_id=2606573&parent\_id=0&viewOnly=0&project\_id=1003&model=ups...

### Professional Services Pay Request

Accept Decline

General Pay Request Details Added Purchase Orders Voucher

#### Task Details

From: Matthew Weber

To: Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Manager

Sent For: PM Approval

#### General

Organization: OAKS CI Test	Record Number: PSPR-0015
Project Number: OCI-080001	Creator: Matthew Weber
Project Name: Agency General Projects Test	Creation Date: 04/27/2020 08:46 AM (UTC-5)
Project Location: OAKS CI Administration	Status: Pending

#### Attachments

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

Total: 1



# PM Approval

- a) Review the information in the General tab
- b) Scroll down to the Payment Requested block

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081\_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606573/undefined/undefined?\_\_uref=uuu62430746...

### Professional Services Pay Request

Send Save

General Pay Request Details

**General**

Organization	OAKS CI Test	Record Number	PSPR-0015
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	Agency General Projects Test	Creation Date	04/27/2020 08:46 AM (UTC-5)
Project Location	OAKS CI Administration	Status	Pending
Title	Matt's Consulting Inc. OCI-00081_PR1	Internal Ref. Number	
Contract Reference	OCI General 080001-02	Professional Services Provider	OCI Test General
Agreement Type	Design	EDGE Certified?	No
Other Description		Received Date	04/27/2020 08:46 AM (UTC-5)
Period From	04/01/2020 05:00 PM (UTC-5)	Period To	04/30/2020 05:00 PM (UTC-5)



# PM Approval

- c) Review the pay request to determine if it accurately reflects work completed to date. Review invoice for any reimbursables.
- d) When the record is ready to move forward, click the **Send** button

C

Professional Services Pay Request - Matt's Consulting Inc. OCI-0...

ohio-unifier.oracleindustry.com/bp/mod/bp/...pentask/260657...

## Professional Services Pay Request

Send Save

General Pay Request Details

04/01/2020 05:00 PM (UTC-5) 04/30/2020 05:00 PM (UTC-5)

PM Approval Date

Payment Requested

Final Payment?	Amount (\$)
No	25,000.00
Invoices for Reimbursable Exp. Attached?	Line Item Total (\$)
No	25,000.00
	Difference (\$)
	0.00

Notes

Pre-Design - Schematic Design - Document Design



# PM Approval

- ▶ If the record is ready to move forward to PC Validation:
  - ▶ Choose **Recommend Approval**
  - ▶ Click **Send**
- ▶ If record must be returned to the Associate for Update :
  - ▶ Choose **Return for Clarification**
  - ▶ Click **Send**

The image displays two screenshots of the Oracle BPM workflow action details form. The left screenshot shows the 'Workflow Action Details' dialog box with the 'Action Details' section expanded. The 'Workflow Actions' dropdown menu is open, showing two options: 'Recommend Approval' and 'Return for Clarification'. A red box highlights these options, and a red arrow points to the 'Recommend Approval' option. The right screenshot shows the same dialog box with the 'Send For' section expanded. The 'Workflow Actions' dropdown is now set to 'Recommend Approval'. The 'Send For' section includes a 'Send For' dropdown set to 'Payment Request Validation', a 'To' field with a list of recipients (Archana Atrey, Matthew Weber, Rita Nichols, Shauna Hooks, Steve Mayo, Project Coordinator), and a 'CC' field with a placeholder 'Start typing for suggestions...'. Below the 'Send For' section is the 'Due Date Details' section, which includes a 'Task Due Date' field and an information icon with the text 'Task Due Date is not available'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Send'. A red arrow points to the 'Send' button.



# **Professional Services Agreement Pay Request Payment Processing (Owner Financial)**



# Professional Services Agreement Pay Request Payment Processing (Owner Financial)

- ▶ As the **Owner Financial** representative you will:
  - ▶ **Create the Voucher (check) in your own financial system of record**
  - ▶ Record a Voucher Record in OAKS CI
  - ▶ Pull the Voucher Record into the Pay Request



# Payment Processing (Owner Financial)

- ▶ Owner Financial receives an Email
- ▶ Click on the “Unifier Login” button to access the task

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: Agency General Projects Test**

**Professional Services Pay Request PSPR-0015 is sent to you for Payment Process.**

From : **Matthew Weber**  
Sent For : **Payment Process**

Source Name : **Agency General Projects Test**  
Record No : **Professional Services Pay Request PSPR-0015**  
Title : **Matt's Consulting Inc. OCI-00081\_PR1**

[Unifier Login](#)



# Task Action (Owner Financial)

- ▶ Click Accept Task

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081\_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608178?task\_id=2608178&parent\_id=0&viewOnly=0&project\_id=1003&model=upspr&\_uref=uuu1...

### Professional Services Pay Request

[Accept](#) [Decline](#) ☰

**General** | Pay Request Details | Added Purchase Orders | Voucher

#### Task Details

From: Matthew Weber

To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Owner Financial

Sent For: Payment Process

#### General

Organization	OAKS CI Test	Record Number	PSPR-0015
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	Agency General Projects Test	Creation Date	04/27/2020 08:46 AM (UTC-5)

#### Attachments

Name	Title
<input checked="" type="checkbox"/> C110-01-2019-MAR-AE_...	

Total: 1



# Payment Processing (Owner Financial)

- ▶ Review information in the General tab

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081\_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608178/undefined/undefined?\_uref=uuu131277555t1

### Professional Services Pay Request

Send Save

**General** Pay Request Details Added Purchase Orders Voucher

**General**

<b>Organization</b>	OAKS CI Test	<b>Record Number</b>	PSPR-0015
<b>Project Number</b>	OCI-080001	<b>Creator</b>	Matthew Weber
<b>Project Name</b>	Agency General Projects Test	<b>Creation Date</b>	04/27/2020 08:46 AM (UTC-5)
<b>Project Location</b>	OAKS CI Administration	<b>Status</b>	Approved
<b>Title</b>	Matt's Consulting Inc. OCI-00081_PR1	<b>Internal Ref. Number</b>	
<b>Contract Reference</b>	OCI General 080001-02	<b>Professional Services Provider</b>	OCI Test General
<b>Agreement Type</b>	Design	<b>EDGE Certified?</b>	No
<b>Other Description</b>		<b>Received Date</b>	04/27/2020 08:46 AM (UTC-5)

**Attachments** Comments Li

Published Attachments

C110-01-2019-MAR-AE\_...

Total: 1



# Payment Processing – Create Voucher (Owner Financial)

- a) Open the Voucher tab
- b) Click Create

The image displays two overlapping screenshots of the Oracle Financials 'Professional Services Pay Request' interface. The top screenshot shows the 'General' tab selected, with the 'Voucher' tab highlighted by a red circle and labeled 'a'. The bottom screenshot shows the 'Voucher' tab selected, with the '+ Create' button highlighted by a red circle and labeled 'b'. The interface includes a left-hand navigation pane with fields for Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Title (Matt's Consulting Inc. OCI-00081\_PR1), Contract Reference (OCI General 080001-02), Agreement Type (Design), and Other Description. The main area shows a table with columns for Title, Vendor Name, Voucher Description, Amount (\$), Status, OAKS Vou..., and Local. The total amount is displayed as 'Total: 0' at the bottom.



# Payment Processing (Owner Financial) Record Voucher

- ▶ Under the General tab:
  - ▶ Title the Record
  - ▶ **Set the Record Status to: Paid**
  - ▶ Choose Financial System of Record

Create New Vouchers - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen\_prof\_ser\_pay\_request\_bp/20265/3?\_\_uref=uuu13127755t1

Create New Vouchers Submit Save ☰

**General** Voucher Distribution Line

**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

Title \*: PSPR OCI-080001 MW2      Status \*: Paid

Financial System of Record \*: OAKS FIN

Attachments    Comments    Linked R... ➤ ⌵

📎 ▼

ℹ  
Information  
No Attachments.

# Payment Processing (Owner Financial)

- ▶ Scroll down the General tab using the slider
- ▶ Pay request details should be populated

Create New Vouchers - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen\_prof\_ser\_pay\_req...

Create New Vouchers Submit Save

General Voucher Distribution Line

Select a Professional Services Pay Request to Voucher. Supporting data from Project Vendor can be updated if needed.

Professional Serv. Pay Request Name	Professional Services Pay Request Amount (\$)
Matt's Consulting Inc. OCI-00081_...	25,000.00

▶ DPE PS Pay Request

Select a Miscellaneous Invoice to Voucher. Supporting data from Project Vendor can be updated if needed.

Miscellaneous Invoice Name	Miscellaneous Invoice Amount (\$)
Type a Title...	0.00

Select a Miscellaneous Expense Record to Voucher.

Miscellaneous Expense Name	Miscellaneous Expense Amount (\$)
Type a Title...	0.00

Vendor Name	Amount (\$)
OCI Test General	25,000.00
Amount on Other Voucher (\$)	0.00
Amount on This Voucher (\$)	25,000.00
Line Item Total (\$)	0.00
Difference (\$)	25,000.00



# Payment Processing (Owner Financial)

- a) Scroll down to Voucher Line 1
- b) Click the button to choose **OAKS PO Name**
- c) Highlight appropriate PO
- d) Click **Select**

The screenshot shows the 'Create New Vouchers' web application. The 'Voucher Line 1' section is highlighted with a red box and contains the following fields:

- OAKS PO Name 1:  (with a magnifying glass icon circled in red and labeled 'b')
- Amount (\$):
- OAKS PO No.:
- System Total (\$):
- Local PO No.:
- Difference (\$):

The 'Voucher Details' section contains the following fields:

- OAKS Voucher ID:
- Local Voucher ID:  (labeled 'c')
- OAKS Payment Date:  (with a calendar icon)
- Local Payment Date:  (with a calendar icon)
- OAKS Payment Method:  (with a dropdown arrow)
- Local Payment Method:  (with a dropdown arrow)
- OAKS Payment Amount (\$):
- Local Payment Amount (\$):

The 'Purchase Orders' modal window is open, showing a table of purchase orders. The 'Select' button at the bottom right is circled in red and labeled 'd'.

Title	Contract Name	OAKS P...	Local P...	Total Am...
OCI Test PO - mmv	mmv-test new workflow			176,000.00
Local Admin Fees	Local Admin Fees	0009877		5,000.00
Consultant List Fees	Consultant List Fees	12345567		5,000.00
Test PO - Brett	Test - GeneralTest Agreement #2	12345		1,000.00
PO #2				0.00
PO #1	Test - General	12345		0.00
PO Test 2	Test - General	852741		3,500.00
PO Test 1	C Testtest#2			0.00
My Company PO1	Migration 2	0009998888		0.00
Testing	Test Agreement			4,000.00
Agreement 5 (Louis and Clark Arch)	SAO Agency	1234567888		0.00
Purchase order test				0.00
Test	ContDist Test 001			0.00
Total: 14				



# Payment Processing (Owner Financial)

e) Enter PO Amount

Create New Vouchers - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen\_prof\_ser\_pay\_req...

### Create New Vouchers

Submit Save

General Voucher Distribution Line

**Voucher Line 1**  
Enter the PO this voucher will be paid from. More lines are available after the Voucher Details block

OAKS PO Name 1	Amount (\$)
OCI Test PO - mmw	25,000.00
OAKS PO No.	Line Item Total (\$)
	0.00
Local PO No.	Difference (\$)
	25,000.00

**Voucher Details**  
OAKS Voucher Number should be 8 digits ex: 00005678

OAKS Voucher ID	Local Voucher ID
OAKS Payment Date	Local Payment Date
MM/DD/YYYY HH:MM AM	MM/DD/YYYY HH:MM AM
OAKS Payment Method	Local Payment Method
Select	Select
OAKS Payment Amount (\$)	Local Payment Amount (\$)
0.00	0.00



# Payment Processing (Owner Financial)

f) In the Voucher Details Section Enter:

- ▶ Voucher ID number (Check #)
- ▶ Payment Date
- ▶ Payment Method
- ▶ Payment Amount

Create New Vouchers - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen\_prof\_ser\_pay\_req...

### Create New Vouchers

Submit Save

General Voucher Distribution Line

Enter the PO this voucher will be paid from. More lines are available after the voucher details block.

OAKS PO Name 1	Amount (\$)
OCI Test PO - mmw	25,000.00
OAKS PO No.	Line Item Total (\$)
	0.00
Local PO No.	Difference (\$)
	25,000.00

#### Voucher Details

OAKS Voucher Number should be 8 digits ex: 00005678

OAKS Voucher ID	Local Voucher ID
01234569	
OAKS Payment Date	Local Payment Date
04/28/2020 05:00 PM (UTC-5)	MM/DD/YYYY HH:MM AM
OAKS Payment Method	Local Payment Method
Electronic Payment (EFT)	Select
OAKS Payment Amount (\$)	Local Payment Amount (\$)
25,000.00	0.00



# Payment Processing (Owner Financial)

- ▶ Open **Voucher Distribution Lines** tab
- ▶ Click **Add**

The screenshot displays the 'Create New Vouchers' interface in Google Chrome. The browser address bar shows the URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen\_prof\_ser\_pay\_req... The page title is 'Create New Vouchers'. The 'General' tab is selected, and the 'Voucher Distribution Line' sub-tab is highlighted with a red circle. A red arrow points to this sub-tab. Below the tabs, there are input fields for 'OAKS PO Name 1' (OCI Test PO - mmw), 'OAKS PO No.', and 'Local PO No.'. The 'Voucher Details' section includes fields for 'OAKS Voucher ID' (01234569), 'OAKS Payment Date' (04/28/2020 05:00 PM (UTC-5)), 'OAKS Payment Method' (Electronic Payment (EFT)), and 'OAKS Payment Amount (\$)' (25,000.00). At the bottom, there is a 'Total: 0' and a 'Total Amount' dropdown set to 0.00. A red arrow points to the 'Add' button in the 'Voucher Distribution Line' sub-tab. An information message on the right states: 'Details of the line item is not available. Select a line item to view the details.'



# Payment Processing (Owner Financial)

- a) Click the button to select a Fund Code
- b) Highlight a Fund Code
- c) Click **Select**

Create New Vouchers - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/100...

### Create New Vouchers

Submit Save

General Voucher Distribution Line

#### Line Item Details

General

Fund Code \*  
Type a Fund Code... 

Fund Name

Short Description \*

Voucher Line 1 (\$) 0.00

Voucher Line 2 (\$) 0.00

Voucher Line 3 (\$) 0.00

Cancel Save Save & Add New

Create New Vouchers - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen...

### Fund Picker

Search | Find on Page

Fund Code	Fund Name	Agency
OCI-Other-TestFund-0-OCI-1	OCI Test Money	OCI
OCI-Other-TestFund-0-OCI-Wave4	OCI Wave 4 Test Fund	OCI

Total: 2

Cancel Select



# Payment Processing (Owner Financial)

- d) Enter Short Description and amount
- e) Click **Save** or **Save & Add New** to add additional funding lines

The screenshot shows a web browser window titled "Create New Vouchers - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen...". The page title is "Create New Vouchers" with a "Submit Save" button and a menu icon. The "General" tab is selected, and the "Voucher Distribution Line" sub-tab is active. The "Line Item Details" section is expanded, showing a "General" sub-section with the following fields:

- Fund Code \*: OCI-Other-TestFund-0-OCI-1
- Fund Name: OCI Test Money
- Short Description \*: Test Fund
- Voucher Line 1 (\$): 25,000.00
- Voucher Line 2 (\$): 0.00
- Voucher Line 3 (\$): 0.00
- Voucher Line 4 (\$): 0.00
- Voucher Line 5 (\$): 0.00

At the bottom of the form, there are three buttons: "Cancel", "Save", and "Save & Add New". The "Save" and "Save & Add New" buttons are circled in red, and a blue circle with the letter 'e' points to them.



# Payment Processing (Owner Financial)

- ▶ Your line(s) will show in the Voucher Distribution Lines tab
- ▶ Click **Submit** to finish recording the voucher

Create New Vouchers - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen\_prof\_ser\_pay\_request\_bp/20165/3?\_uref=uuu131...

### Create New Vouchers

General **Voucher Distribution Line**

Line Item Details Attachments Linked Records

No.	Fund Code	Fund
001	OCI-Other-TestFund-0-OCI-1	OCI

**Line Item Details**

General

Fund Code \*  
OCI-Other-TestFund-0-OCI-1

Fund Name  
OCI Test Money

Short Description \*  
Test Fund

Voucher Line 1 (\$) 25,000.00

Voucher Line 2 (\$) 0.00

Voucher Line 3 (\$) 0.00

Total: 1 Total Amount 25,000.00

Cancel Save Save & Add New



# Payment Processing (Owner Financial)

- a) Return to the **General** tab
- b) Scroll down to the **Voucher Information** section
- c) Click the button to select previously recorded **Voucher**
- d) Highlight **Voucher**
- e) Click **Select**

The screenshot shows the 'Professional Services Pay Request' interface. The 'General' tab is selected and circled in red, with a blue circle 'a' pointing to it. Below the tab are fields for OAKS PO.5 No., OAKS PO.5 Amount (\$), and Amount Applied (\$), along with Local PO.5 No., Local PO.5 Amount (\$), and Amount Applied (\$). Summary fields show Pay Request Amount (25,000.00), Total Applied (\$), and Difference (\$). A 'Voucher Information' section contains a search field with a magnifying glass icon circled in red, and a blue circle 'c' pointing to it. To the right, an 'Attachments' panel is visible with a blue circle 'b' pointing to it. An inset window titled 'Vouchers' shows a table of vouchers with a blue circle 'd' pointing to the 'Vendor Name' column. At the bottom right of the inset, 'Cancel' and 'Select' buttons are shown, with a blue circle 'e' pointing to the 'Select' button.

Title	Vendor Name	Voucher Description	Amount (\$)	Status	OAKS V
PSPR OCI-080001 MW2	OCI Test General	Matt's Consulting Inc. O...	25,000.00	Paid	0123456
PSPR OCI-080001 MW1	OCI Test General	Matt's Consulting OCI-0...	146,000.00	Paid	0123456
Local Admin Fees	Ohio Facilities Construction Com...	Local Admin Fees	5,000.00	Paid	000899E
test			0.00	Paid	
Test Voucher	OCI Test GeneralOCI Test General	OCI Test General PR 2...	5,378.00	Paid	1234567
Contractor Pay Request 001	OCI Test General	PR-004 Test	2,960.00	Paid	1234567
M Test	OCI Migration Inc	Migration 1	400.00	Paid	
Testing	OCI Test General	Testing	0.00	Paid	
Cloud Migration Test	OCI Test General	Cloud Migration Test	6,508.00	Paid	0000122
Test	OCI Test General	Misc. Inv	50.00	Paid	
Voucher Title	OCI Test General	PR #4	2,500.00	Paid	0000454
d			0.00	Paid	
OCI Test	OCI Test General	OCI Test General PR.2	378.00	Paid	
OCI Test PR 1	OCI Test General	OCI Test General PR 1	1,098.00	Paid	
jfkjflka	OCI Test General	PR #1	1,600.00	Paid	
2test	OCI Test General	pr#3	2,900.00	Approved	
1test	OCI Test General	PR#2	8,300.00	Approved	
test #2	OCI Test General	PR #1	1,600.00	Approved	



# Payment Processing (Owner Financial)

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

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081\_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608178/undefined/undefined?\_\_uref=uuu13127755...

### Professional Services Pay Request

**Send** Save

General Pay Request Details Added Purchase Orders Voucher

OAKS PO.5 No.	OAKS PO.5 Amount (\$)	Amount Applied (\$)
<input type="text"/>	0.00	0.00
Local PO.5 No.	Local PO.5 Amount (\$)	Amount Applied (\$)
<input type="text"/>	0.00	0.00

Pay Request Amount: 25,000.00

Total Applied (\$): 0.00

Difference (\$): 25,000.00

**Voucher Information**

Voucher \*  
OCI Test General

Voucher Title: PSPR OCI-080001 MW2  
Voucher Amount (\$): 25,000.00

Attachments: C110-01-2019-MAR-AE\_...

Total: 1



# Payment Processing (Owner Financial)

- ▶ Verify Workflow Action
- ▶ Click **Send**
- ▶ This will end the Professional Services Pay Request Workflow

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081\_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608178/undefined/undefined?\_uref=uuu13127755...

Professional Services Pay Request

Workflow Action Details

General Pay Request

OAKS PO.5 No. [ ]

Local PO.5 No. [ ]

Voucher Information

Voucher \* OCI Test Genera

Voucher Title PSPR OCI-0800

Action Details

Workflow Actions \* Vouchered

Send For End

CC Start typing for suggestions...

Cancel Send



# 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](https://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>

