



DPE PS Pay Request

RPC Consultants

Purpose & Procedure

- ▶ Provides for the submission, review, and approval of interim or final payment requests for services completed by the regional planning coordinator
- ▶ References and relates directly to the schedule of values (SOV) line item amounts as outlined in the Agreement

- ▶ Workflow

Created by: **RPC Consultant** → Submitted to: **Planner Approval** →
Sent to: **RPC Update (if necessary)** → Sent to: **OFCC Fiscal for Review** →
Sent to: **OFCC for Payment Process**

Creation Step

- ▶ RPC Consultant:
 - ▶ Creates the DPE PS Pay Request
 - ▶ Submits the Request for Approval
 - ▶ **Note:** Any documents that need attached to the pay request must be uploaded into Document Manager first
 - ▶ For information on Document Manager, please refer to the Job Aid on the OFCC website, ofcc.ohio.gov, under **All Users**

DPE PS Pay Request Creation

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> DPE PS Pay Request
 - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'ORACLE' and 'PRIMAVERA Unifier (Development)'. Below this, there are tabs for 'Company Work...', 'Agency', and 'SAO Consul'. The main content area is titled 'DPE PS Pay Rec' and features a '+ Create' button circled in red. A sidebar menu on the left is open, showing 'Logs' circled in red with a red arrow pointing to the 'DPE PS Pay Request' option. Below the sidebar, a table lists various items with a 'Title' column. The table content is as follows:

	Title
	Harrison Planr
	65% PR1
	Hooks Co. PR
	Hooks Co. PR
	Trotwood Mad
	Champion LSI
	Harrison Planr
	Harrison Planr
	Resource RPC
	Resource RPC

At the bottom of the interface, it shows 'Total: 10'.

Complete Form

▶ Enter the required * fields

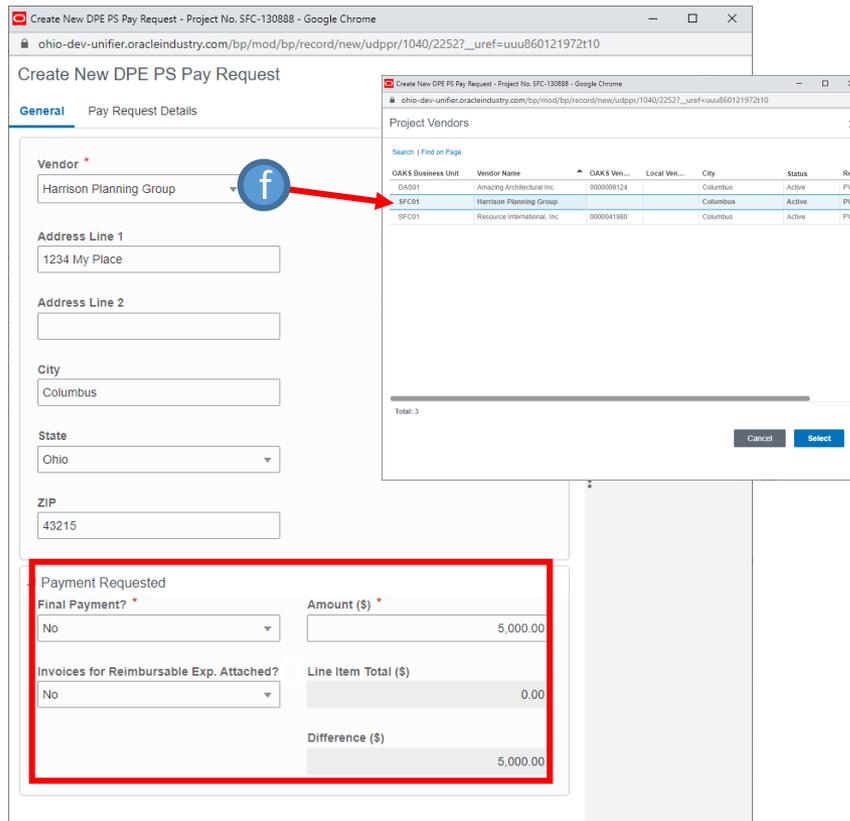
- a) Enter the **Title**
- b) Click **Select** button in Contract Reference field
- c) In the new window, choose appropriate contract
- d) Click **Select**
- e) Enter **Period From** and **Period To** dates

The screenshot shows a web browser window titled "Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?_uref=uuu860121972t10". The page title is "Create New DPE PS Pay Request". The form is divided into "General" and "Pay Request Details" tabs. The "General" tab is active, showing fields for Organization, Record Number, Project Number (SFC-130888), Creator (Matthew Weber), Project Name (OFCC Specialty Consultant List), Project Location (OFCC), Title (Trotwood Madison 65%), Contract Reference (Harrison Planning Group - Fa...), Agreement Type (Other), and Other Description. The "Pay Request Details" tab shows fields for Creation Date, Status, Internal R..., Profession..., EDGE Cer..., and Received... A modal window titled "Professional Services Agreements" is open, showing a table of contracts. The table has columns: Title, Professional Services Provi..., Agreement Type, Total Agreement A..., and CA Ho... The table contains three rows of data. A "Select" button is highlighted in the modal window. The "Period From" and "Period To" fields are also highlighted, with values "09/01/2020 05:00 PM (UTC-5)" and "10/31/2020 05:00 PM (UTC-5)" respectively. Annotations a-e are placed on the form to indicate the steps: a) Title field, b) Select button in Contract Reference field, c) Select button in the modal window, d) Select button in the modal window, and e) Period From and Period To fields.

Title	Professional Services Provi...	Agreement Type	Total Agreement A...	CA Ho...
Harrison Planning Group - F...	Harrison Planning Group	Other	100,000.00	
Resource International - RPC	Resource International, Inc.	Other	800,000.00	
Consultant Name-Project Num...	Amazing Architectural Inc.		25,000.00	2

Complete Form

- ▶ Select the Vendor
- ▶ Complete the fields in the Payment Requested block



Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?_uref=uuu860121972t10

Create New DPE PS Pay Request

General Pay Request Details

Vendor *
Harrison Planning Group

Address Line 1
1234 My Place

Address Line 2

City
Columbus

State
Ohio

ZIP
43215

Payment Requested

Final Payment? *
No

Amount (\$) *
5,000.00

Invoices for Reimbursable Exp. Attached?
No

Line Item Total (\$)
0.00

Difference (\$)
5,000.00

Project Vendors

Search | Find on Page

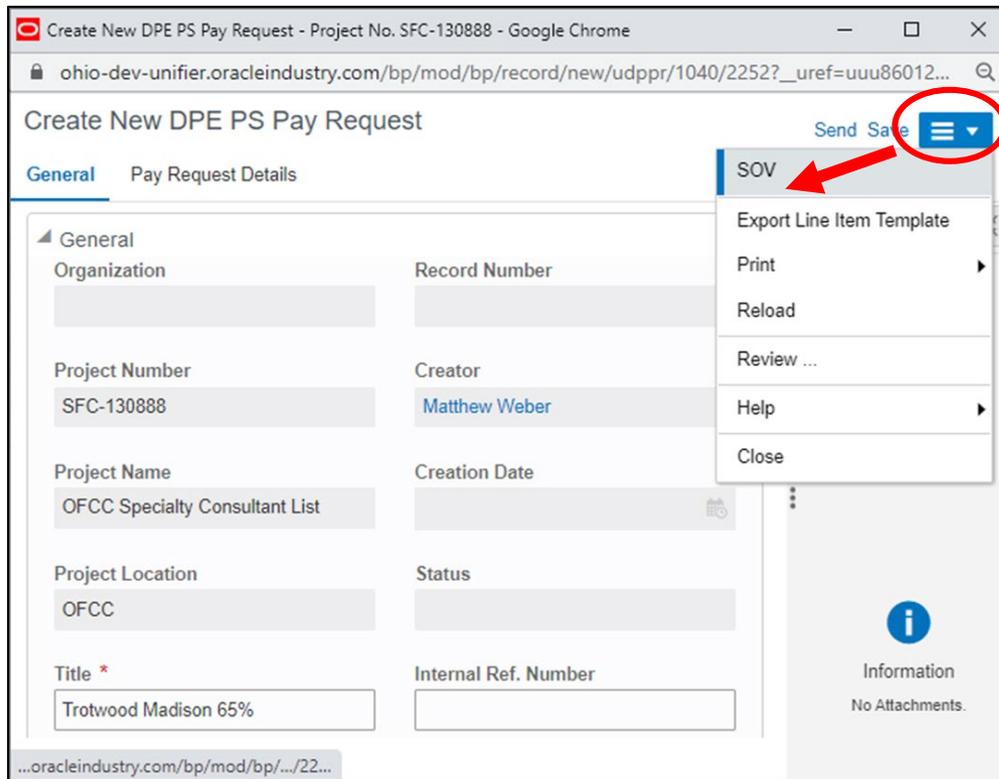
OAKS Business Unit	Vendor Name	OAKS Ven...	Local Ven...	City	Status	Re
DAS01	Amisberg Architectural Inc.	000009124		Columbus	Active	PV
SFC01	Harrison Planning Group			Columbus	Active	PV
SFC01	Resource International, Inc.	000004180		Columbus	Active	PV

Total: 3

Cancel Select

Review SOV

- ▶ 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 Button → SOV at the top of your window



Review SOV

- ▶ This allows you to look at the Commits Remaining Balance for each of the line items on your SOV

Screenshot of a web browser showing a 'Schedule of Values' table. The table lists 16 line items with columns for Item #, Ref, Description, WBS Code, and Commits Remaining Balance. The 'Commits Remaining Balance' column is highlighted with a red box. The total balance at the bottom is 290,400.00.

Item #	Ref	Description	WBS Code	Commits Remaining Balance
000010	1	Basic Services - Landscape	AE-BS-BE	0.00
000020	2	Basic Services	AE-BS-BE	0.00
000030	3	Change Order Fee Allowance	AE-AS-CO	0.00
000040	4	Schematic	AE-BS-SD	89,000.00
000050	5	Professional Design	AE-AE-BE	155,000.00
000060	6	Basic Services	AE-BS-BE	12,500.00
000070	7	Design	AE-BS-DD	32,500.00
000080	8	Tests	AE-AS-TI	0.00
000090	9	tests	AE-AS-TI	0.00
000100	10	Test	AE-AS-TI	0.00
000110	11	Test	AE-AS-TI	0.00
000120	12	Tests	AE-AS-TI	0.00
000130	13	Test's	AE-AS-TI	0.00
000140	14	Tests	AE-AS-TI	0.00
000150	15	testing	AE-AS-TI	0.00
000160	16	Test soil	AE-AS-TI	0.00
				290,400.00

Add Line Items

- a) Click on the **Pay Request Detail Tab**
- b) Click **Add**

Create New Professional Services Pay Request - Project No. OCI-100001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1016/1498?__uref=uuu366860808t8

Create New Professional Services Pay Request

Send Save

General **Pay Request Details**

Add Actions Refresh Print Search Help

No.	WBS Code	Code Name	Short Description
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Total: 0

Total Amount: 0.00

Information

Details of the line item is not available. Select a line item to view the details.

Add Line Items

- c) Click the **Select** button next to WBS Code
- d) Choose the appropriate line
- e) Click Select

The screenshot shows the 'Create New DPE PS Pay Request' application. The 'Line Item Details' form is visible, with the 'WBS Code' field set to 'CS-FA-SV'. A red circle labeled 'c' highlights the 'Select' button next to the WBS Code field. A red arrow points from this button to the 'SOV Picker' dialog. The dialog shows a table of SOV items with the following data:

Item #	Ref	Description	CBS Code
000010	1	Contract Amount (Not Billable)	CS-FA-SV
000020	2	Champion High School	CS-FA-OT
000030	3	Champion Middle School	CS-FA-OT
000040	4	Champion Central Elementary School	CS-FA-OT
000050	5	Champion LSD Printing fee	CS-FA-OT
000060	6	Trotwood School District	CS-FA-OT
000070	7	Trotwood School District	CS-FA-OT
000080	8	Trotwood School District	CS-FA-OT
000090	9	Educational Planning	CS-PL-ED
000100	10	planning	CS-PL-ED
000110	11	Educational Planning	CS-PL-ED

The first row of the table is highlighted with a red box. A red circle labeled 'e' points to the 'Select' button at the bottom of the dialog.

Add Line Items

- ▶ Enter a Short Description, select Service Category and the Amount
- ▶ Click “Save & Add New” to add additional lines
- ▶ Click “Save” to finish



Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?_uref...

Create New DPE PS Pay Request Send Save

General Pay Request Details

Line Item Details

WBS Code *
CS-FA-SV

Code Name
CS Assessment SOV Pending

District *
Westerville City SD

Service Category *
Facility Assessment

Work Assignment

Short Description *
Facility Assessment

Item Quantity *
1

Item Unit Cost *
15,000.00

Percent Billed This Request
100

Amount (\$) 15,000.00

Cancel Save Save & Add New



Add Line Items

- ▶ Saved Line Item information displays in the **Pay Request Details** tab
- ▶ Continue to enter line items as necessary
- ▶ The **Total Amount** of all Line Items will display at the bottom

The screenshot shows a web application interface for creating a new DPE PS Pay Request. The browser title is "Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?_uref=uuu860121972t10".

The main heading is "Create New DPE PS Pay Request". Below it, there are tabs for "General" and "Pay Request Details". The "Pay Request Details" tab is active.

There is a table with the following columns: No., SOV R..., WBS Code, District, Service Category, and Sh. The table contains one row with the following data:

No.	SOV R...	WBS Code	District	Service Category	Sh
001	6	CS-FA-OT	Alliance City SD	Facility Assessment	Fa

Below the table, there is a "Total Amount" field showing "5,000.00".

On the right side, there is a "Line Item Details" panel with the following fields:

- General
- SOV Reference Number: 6
- WBS Code: CS-FA-OT
- Code Name: CS Other Facility Assessment
- District: Alliance City SD
- Service Category: Facility Assessment
- Work Assignment
- Short Description: Facility Assessment
- Item Quantity: 1

At the bottom of the panel, there are buttons for "Cancel", "Save", and "Save & Add New".

Add Line Items

- ▶ Click the **General** tab to return
- ▶ Ensure that the total dollar amount seen on the **Pay Request Details** tab matches the Amount seen on the **General** tab

Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udpr/1040/2252?_uref=uuu860121972t10

Create New DPE PS Pay Request

Send Save

General Pay Request Details

Address Line 1
1234 My Place

Address Line 2

City
Columbus

State
Ohio

ZIP
43215

Payment Requested

Final Payment? *
No

Invoices for Reimbursable Exp. Attached?
No

Amount (\$) *
5,000.00

Line Item Total (\$)
5,000.00

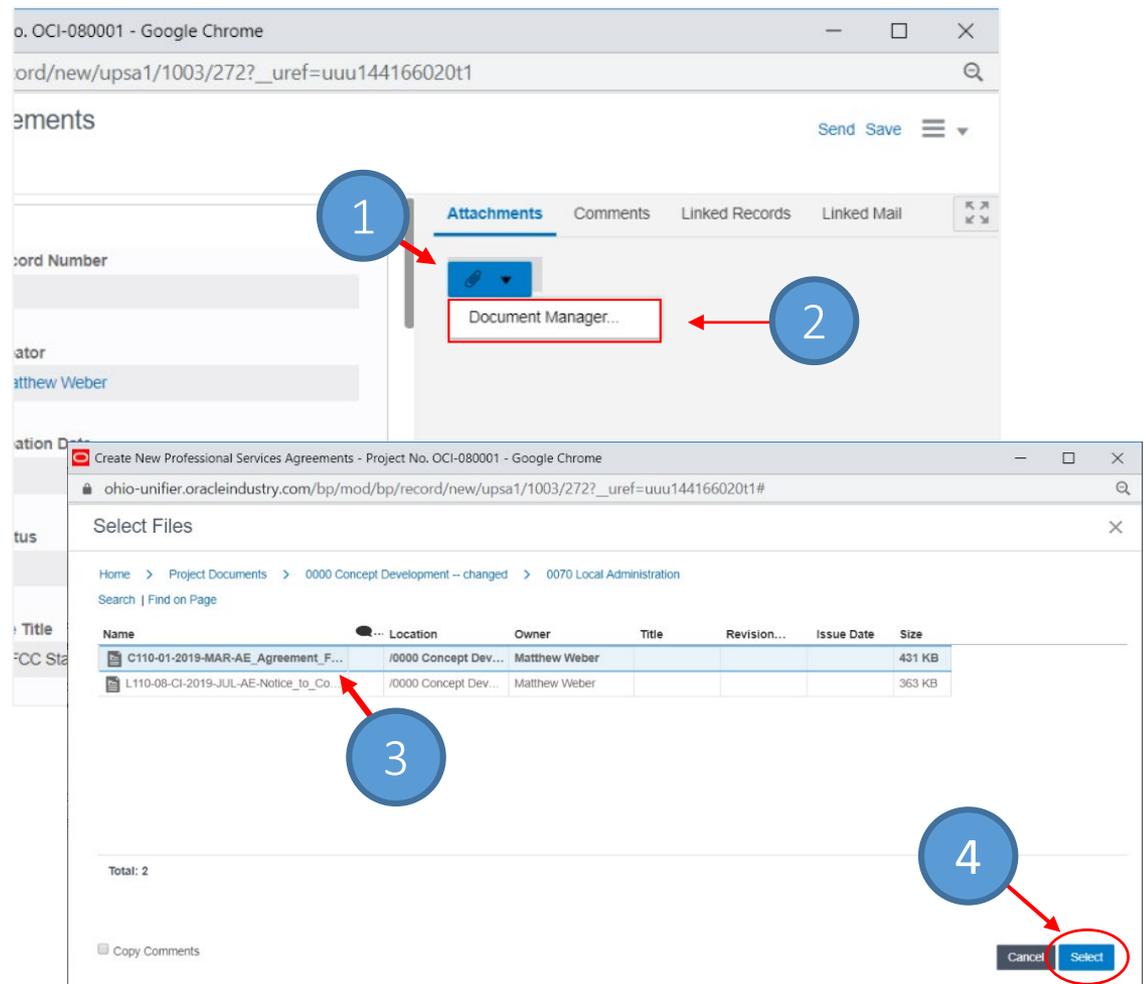
Difference (\$)
0.00

Attachments
Information
No Attachments.

Add Attachments

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**



Add Attachments

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 Pay Request - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/312376/1?_uref=uuu418648075t1#

Create New Professional Services Pay Request **Send Save**

General Pay Request Details

General

Organization	Record Number
OAKS CI Test	
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	
Project Location	Status
OAKS CI Administration	
Title *	Internal Ref. Number
Matt's Consulting OCI-00081_PI	
Contract Reference *	Professional Services Provider
mmw-test new wor...	OCI Test General

Attachments Comments Linked

Published Attachments

<input checked="" type="checkbox"/>	C110-01-2019-MAR-AE...
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Total: 1

Submit Record

- ▶ Verify Workflow Action: **Submit**
- ▶ Click **Send**

The screenshot shows a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2247?__uref=uuu738858349...`. The main content is a 'Workflow Action Details' dialog box. The dialog has a 'General' tab selected. Under 'Action Details', the 'Workflow Actions' dropdown is set to 'Submit' (highlighted with a red box). The 'Send For' field is 'Approval and Validation'. The 'To' field contains 'Consultant Student1;Consultant Student10;Consultant Student11;Consultant Student12;Consult...'. The 'CC' field is empty with the placeholder text 'Start typing for suggestions...'. Under 'Due Date Details', the 'Task Due Date' field is empty. A blue information icon is present with the text 'Task Due Date is not available'. At the bottom right, there are 'Cancel' and 'Send' buttons, with the 'Send' button circled in red and a red arrow pointing to it. The background shows a 'Create New' form with a 'Total: 1' label.

Submit Record

- ▶ Click Send

Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?__uref=uuu860121972t10

Create New DPE PS Pay Request

General Pay Request

Address Line 1
1234 My Place

Address Line 2

City
Columbus

State
Ohio

ZIP
43215

Payment Requester
Final Payment? *
No

Workflow Action Details

Action Details

Workflow Actions *
Submit

Send For
RPC Approval and Validator

To
Matthew Weber

CC
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send

Information
No Attachments.

What if I want to know the status of my Record?



Basic Record Status

- ▶ In Logs, choose Record type, click on specific Record
- ▶ The basic status can be viewed in the “Record Details” preview

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Katie Tuttle'. The main navigation menu on the left lists various modules, with 'Logs' and 'Action Items' circled in red. The central 'Action Items' section shows a table of records, with the first row 'AI-00165 Test Action Item' highlighted. A red arrow points from this row to the 'Record Details' panel on the right. In the 'Record Details' panel, the 'Status' is 'Pending', which is also circled in red.

ORACLE PRIMAVERA Unifier Katie Tuttle Sign Out

School Facilities OAKS CI District... Oak Hills Local ... OAKS CI Trainin...

Agency > OAKS CI Training > OAKS CI Training 4

Action Items Switch to Classic View

+ Create Actions View All Records

Record No	Title	Assignee	Due D
AI-00165	Test Action Item		05/0
AI-00164	test 1		05/0
AI-00163	test 1		05/0
AI-00162	Chris Hare		04/1
AI-00161	Carol Amistadi _ PPH		04/1
AI-00160	Winnie Agbalevu		04/1
AI-00159	Katie Marie		04/1
AI-00158	Ben Posey		04/1
AI-00157	katie		04/1
AI-00156	DAVE BILLS		04/1
AI-00155	Emily Rinear		04/1
AI-00154	Katie Tuttle		04/1
AI-00153	STUDENT 4		03/3

Total: 165

Record Details Workflow Progress

General

Organization: Department of Administrative Services
Record Number: AI-00165

Project Number: OCI-090004
Creator: Katie Tuttle

Project Name: OAKS CI Training 4
Creation Date: 05/02/2017 10:20 AM (UTC-8)

Project Location: 4200 Surface Road

Title: Test Action Item
Status: Pending

Assignee:
Priority: Medium

Meeting Minute:
Due Date: 05/09/2017 10:05 AM (UTC-8)

Action

Workflow Progress

- ▶ Click “Workflow Progress” in the preview screen to view the step-by-step information about this record

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The breadcrumb trail shows 'Agency > OAKS CI Training > OAKS CI Training 4'. The main content area is divided into two sections. On the left, the 'Action Items' table lists various records with columns for Record No, Title, Assignee, and Due Date. On the right, the 'Record Details' section is active, showing the 'Workflow Progress' tab. A red arrow points to this tab. Below the tab, a 'Workflow Progress' table is displayed, which is highlighted with a red border. This table has columns for Step Name, Assignee, Status, and Action. The 'Creation' step is completed by Katie Tuttle, while subsequent 'Response' steps are not started by Steve Mayo, Oaks Instructor, Bill Schwertfager, and Rita Nichols. A 'Filter By' dropdown is set to 'All Steps'.

Record No	Title	Assignee	Due Date
AI-00165	Test Action Item		05/09/2017
AI-00164	test 1		05/01/2017
AI-00163	test 1		05/01/2017
AI-00162	Chris Hare		04/19/2017
AI-00161	Carol Amistadi _ PPH		04/19/2017
AI-00160	Winnie Agbalevu		04/14/2017
AI-00159	Katie Marie		04/19/2017
AI-00158	Ben Posey		04/19/2017
AI-00157	katie		04/13/2017
AI-00156	DAVE BILLS		04/13/2017
AI-00155	Emily Rinear		04/12/2017
AI-00154	Katie Tuttle		04/14/2017
AI-00153	STUDENT 4		03/30/2017
AI-00152	Student 2	Student 1	04/27/2017
AI-00151	Student 6		03/30/2017

Title	Record Number	Current Step	BP Setup Used
Test Action Item	AI-00165	Response	Action Items

Filter By: All Steps

Step Name	Assignee	Status	Action
Creation	Katie Tuttle	Completed	Send
Response	Steve Mayo	Not Started	
Response	Oaks Instructor	Not Started	
Response	Bill Schwertfager	Not Started	
Response	Rita Nichols	Not Started	
Review			
Response Support			
Delegate Response			
End			

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211