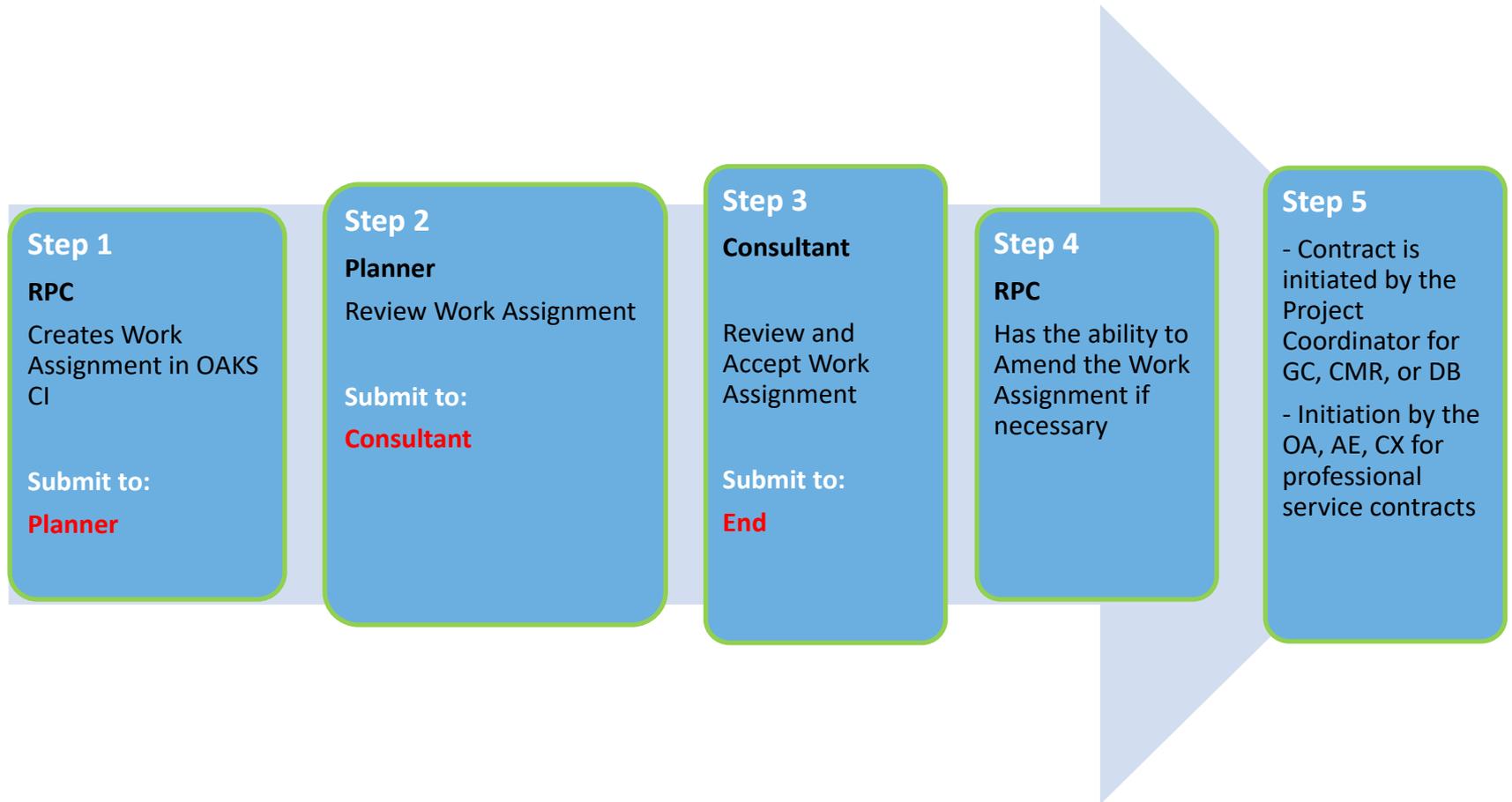




Create and Amend Work Assignments

RPC Consultants

Process



Creating a Work Assignment

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> **Work Assignments**
 - ▶ Click **Create**

ORACLE PRIMAVERA Unifier (Development)

Agency: SAO Consultant... OFCC Specialty...

Agency > Ohio Facilities Co... > OFCC Special...

Work Assignments

+ Create Actions View All Records

Title	Vendo
Trotwood LSD Assessment	Harris
Trotwood LSD Assessment	Harris
Amended Trotwood Madison LSD	Harris
Trotwood LSD Assessment	Harris
Champion LSD Assessment	Harris
Kings Local RPC Amendment	Resou
Fix it fast (Recalled)	Resou
Strongsville City RPC	Resou
Northridge LSD (Montgomery)	Resou
Licking Heights LSD	Resou
Kings Local RPC	Resou
RPC	Resou
Fix it fast	Resou
Akron stuff for RPC	Resou
Amhurst EVSD RPC	Resou
Toledo Segment 1 AUP-KCR	Amazi

Total: 18

Form Completion

- ▶ Enter all relevant information into the general form
- ▶ Items with a red * are required
- ▶ Scroll down to complete the remainder of the general form
- ▶ Complete the Start and Completion date
- ▶ Plug in the amount of the Work Assignment

Create New Work Assignments

Send Save

General Standard

General

Organization

Record Number

Project Number

SFC-130888

Creator

Matthew Weber

Project Name

OFCC Specialty Consultant List

Creation Date

Title *

Educational Planning Services FY20

Requested By

Katie Tuttle

Status

Attach

Information

No Attachments.

Work Assignments - Dayton Public Work Assignment - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/uwa/29/0/0?srcid=29&model=...

Work Assignments

General Standard

Budgeted amount must also be entered on the lower form to make work assignment available on the vendors pa request.

Start Date

10/02/2020

Completion Date

10/31/2020

Budget Estimate (Not to be Exceeded)

\$15,000.00

Form Completion

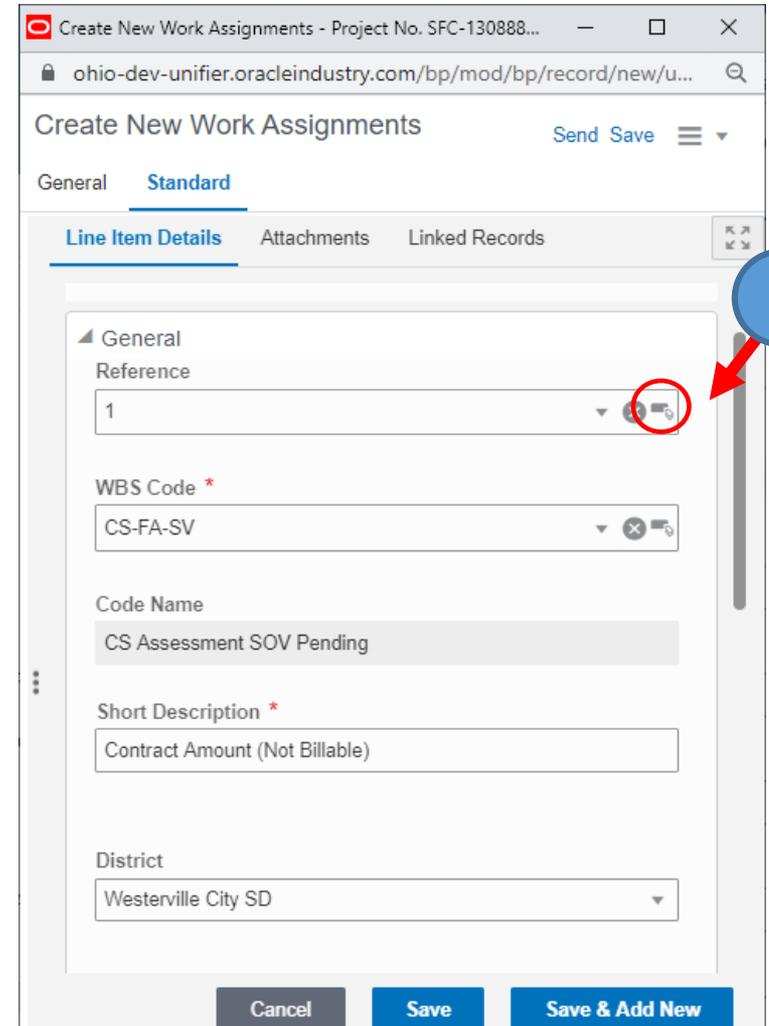
- a) Click the **Standard** tab to identify the work to be assigned
- b) Click **Add**

The screenshot shows the 'Create New Work Assignments' form in Oracle Primavera P6. The browser title is 'Create New Work Assignments - Project No. SFC-130888 - Google Chrome'. The URL is 'http://ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7524?__uref=uuu860121972t10'. The form has a 'General' tab and a 'Standard' tab, with 'Standard' highlighted by a red circle and labeled 'a'. Below the tabs is a toolbar with an 'Add' button highlighted by a red box and labeled 'b'. The main area contains a table with columns for 'No.', 'Reference', 'WBS Code', and 'Code Name'. At the bottom, there is a 'Total Amount' field showing '0.00'.

Add Line Items

- ▶ The first line you will add will be the deduct line, this is to take money away from the original contract line and give it to the Work Assigned line. This will balance the work assignment.

c) Click the **Select** button next to Reference



The screenshot shows the 'Create New Work Assignments' form in Oracle Primavera. The form is titled 'Create New Work Assignments - Project No. SFC-130888...' and is located at 'ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/u...'. The form has tabs for 'General' and 'Standard', with 'Standard' selected. Under the 'Standard' tab, there are sub-tabs for 'Line Item Details', 'Attachments', and 'Linked Records', with 'Line Item Details' selected. The 'Line Item Details' section contains several fields: 'Reference' (value: 1), 'WBS Code *' (value: CS-FA-SV), 'Code Name' (value: CS Assessment SOV Pending), 'Short Description *' (value: Contract Amount (Not Billable)), and 'District' (value: Westerville City SD). A red circle highlights the 'Select' button next to the 'Reference' field, and a red arrow points to it from a blue circle containing the letter 'C'. At the bottom of the form, there are three buttons: 'Cancel', 'Save', and 'Save & Add New'.

Add Line Items

- ▶ The first line you will add will be the deduct line, this is to take money away from the original contract line and give it to the Work Assigned line. This will balance the work assignment.

- d) Choose the line item (the line should be labeled, Not Billable or SOV Pending)
- e) Click the **Select** button next to Reference

Create New Work Assignments - Project No. SFC-130888 -...

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/u...

Commit Line Item Picker

Search | Find on Page

n #	Ref	Description
110	1	Contract Amount (Not Billable)
120	2	Champion High School
130	3	Champion Middle School
140	4	Champion Central Elementary School
150	5	Champion LSD Printing fee
160	6	Trotwood School District
170	7	Trotwood School District
180	8	Trotwood School District
190	9	Educational Planning
100	10	planning
110	11	Educational Planning

Total: 11

Cancel **Select**

Add Line Items

▶ Information about the chosen Reference line will populate in the form

- f) For Item **Quantity**, enter “1”
- g) For **Units**, select “Amount”
- h) For **Item Unit Cost**, enter the deduct amount of the Work Assignment (If the work assignment is for \$15,000 then enter **-\$15,000**)
- i) Click **Save & Add New** to add the other Work Assignment line

Create New Work Assignments - Project No. SFC-130888...

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/u...

Create New Work Assignments Send Save

General **Standard**

Line Item Details Attachments Linked Records

Short Description *
Contract Amount (Not Billable)

District
Westerville City SD

Item Quantity
1

Units
Amount

Item Unit Cost
-15,000.00

Amount (\$)
-15,000.00

Cancel Save **Save & Add New**

Add Line Items

- ▶ You have now added the line you are pulling from in order to fund the work assignment
- ▶ Now it is time add the Work Assignment Line item/s

The screenshot shows a web application window titled "Work Assignments - Dayton Public Work Assignment - Project No. SFC-130888 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/uwa/29/0/0?srcid=29&model=uwa&fromcostlog=1&project_id=1040&nfl=0&_uref=uuu275216655t16".

The main area is titled "Work Assignments" and has a "Send Save" button. Below the title is a "General" tab and a "Standard" sub-tab. There are buttons for "Add", "Actions", "View Currency", and "Transaction Currency".

No.	Reference	WBS Code	Code Name	Short Description
001	1	CS-FA-SV	CS Assessment SOV Pending	Contract Amount (No

At the bottom left, it says "Total: 1". At the bottom right, there is a "Total Amount" dropdown set to "(\$15,000.00)".

The "Line Item Details" sidebar is open, showing a "General" section with the following fields:

- Reference:
- WBS Code *:
- Code Name:
- Short Description *:

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

Add Line Items

a) This time, click the arrow next to WBS code

Create New Work Assignments - Project No. SFC-130888 - Google...
ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7524?_...

Create New Work Assignments

Send Save

General **Standard**

Line Item Details

General

Reference
Type a Reference No...

WBS Code *
CS-PL-ED

Code Name
CS Educational Planning Service

Short Description *
Educational Planning

District
Westerville City SD

Cancel Save Save & Add New

Add Line Items

- ▶ You will see a large list of WBS codes
- b) To simplify, click the Collapse button

Browser window: Create New Work Assignments - Project No. SFC-130888 - Google Chrome
URL: ohio-dev-unifier.oracleindustries.com/bp/mod/bp/record/opendraft/7524?_uref=uuu860121972t10

Dialog Title: CBS Picker

Toolbar: Search, Filter, Collapse (highlighted with red circle and 'b'), Close

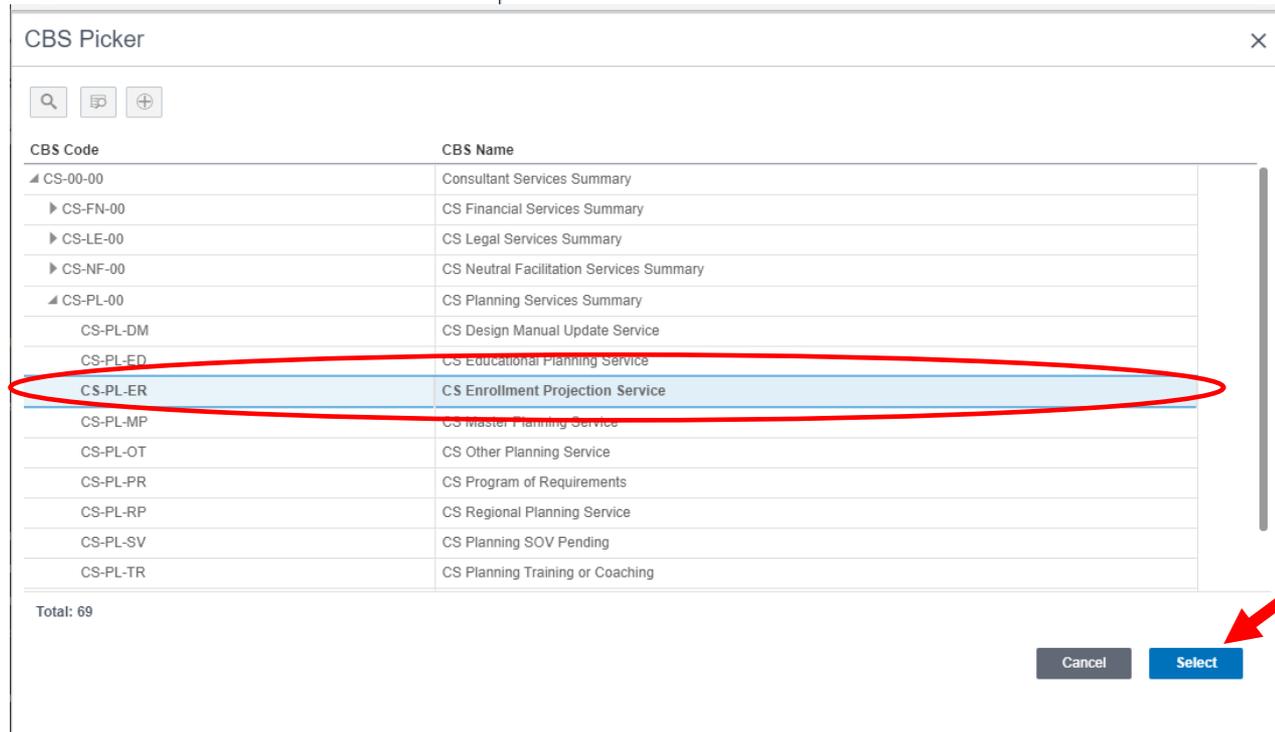
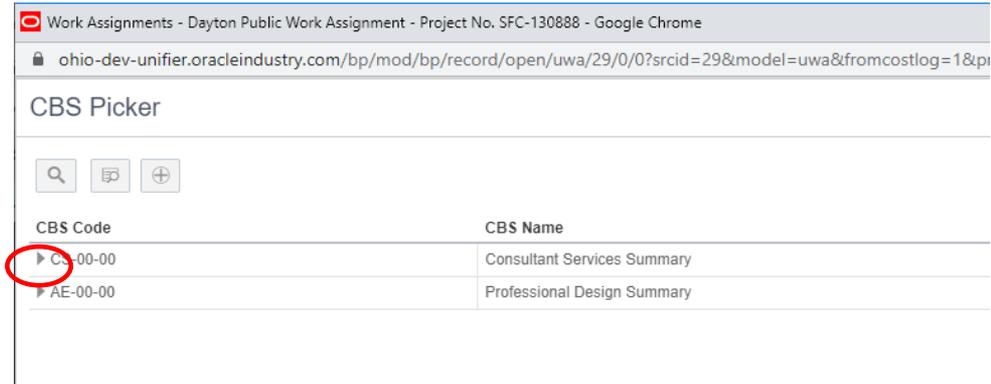
CBS Code	CBS Name
▲ CS-00-00	Consultant Services Summary
▲ CS-FN-00	CS Financial Services Summary
CS-FN-AU	CS Project Auditing Services
CS-FN-FR	CS Final Reconciliation Services
CS-FN-OT	CS Other Financial Services
CS-FN-SV	CS Financial SOV Pending
▲ CS-LE-00	CS Legal Services Summary
CS-LE-AC	CS Claims Analysis
CS-LE-MD	CS Legal Mediation
CS-LE-OT	CS Other Legal Expense
CS-LE-SV	CS Legal SOV Pending
▲ CS-NF-00	CS Neutral Facilitation Services Summary
CS-NF-BP	CS BIM Execution Plan Facilitation
CS-NF-CH	CS Charrette Facilitation
CS-NF-EF	CS Eco Charrette Facilitation

Total: 69

Buttons: Cancel, Select

Add Line Items

- c) Click > next to CS-00-00
 - d) Choose appropriate code
- Click Select



Add Line Items

- ▶ Complete appropriate fields

Click Save and Add New to add additional lines

or

Click Save

The screenshot displays a 'Line Item Details' form. At the top right, there are 'Send Save' and a menu icon. The form fields are as follows:

- WBS Code ***: CS-PL-ED
- Code Name**: CS Educational Planning Service
- Short Description ***: (empty)

Below these fields, there is another 'Send Save' and menu icon. The main form area contains:

- Westerville City SD** (selected in a dropdown)
- Item Quantity**: 1
- Units**: Amount
- Item Unit Cost**: \$15,000.00
- Amount (\$)**: \$15,000.00
- Description**: (empty text area)

At the bottom of the form, there are three buttons: 'Cancel', 'Save', and 'Save & Add New'. A 'Save & Add New' button is also visible on the right side of the form area.

Add Line Items

- ▶ The work line is now populated in the Standard tab
- ▶ Your Total Amount should now reflect **\$0.00**

Create New Work Assignments - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/uwa/1040/2250?__uref=uuu910871008t10

Create New Work Assignments

Send Save

General **Standard**

Add Actions

No.	Reference	WBS Code	Code Name	Short Description	Amount (\$)
002	0	CS-PL-ED	CS Educational Planning S...	Educational Planning	15,000.00
001	1	CS-FA-SV	CS Assessment SOV Pending	Contract Amount (Not Billable)	-15,000.00

Total: 2

Total Amount: 0.00

Line Item Details

District: Westerville City SD

Item Quantity: 1

Units: Amount

Item Unit Cost: 15,000.00

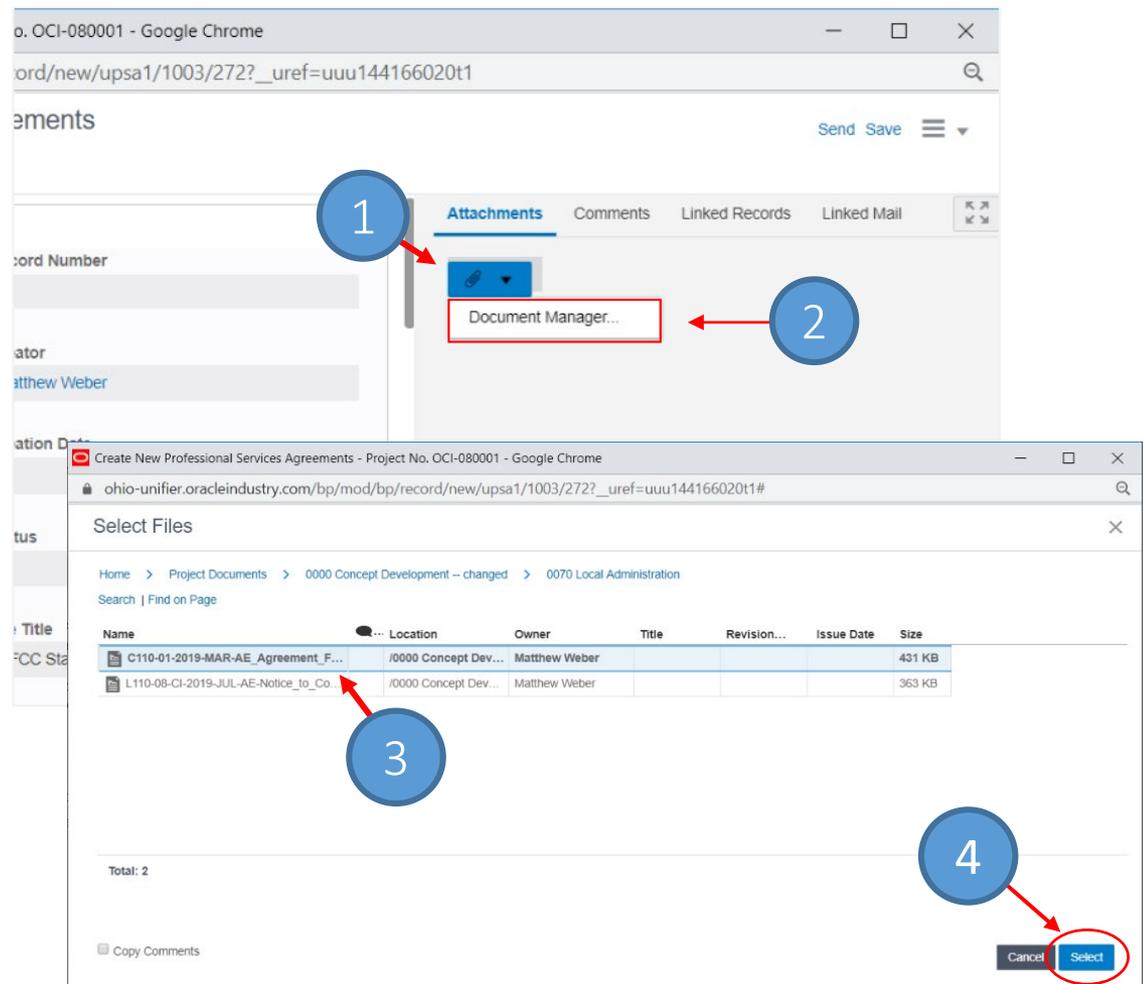
Amount (\$): 15,000.00

Cancel Save

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**

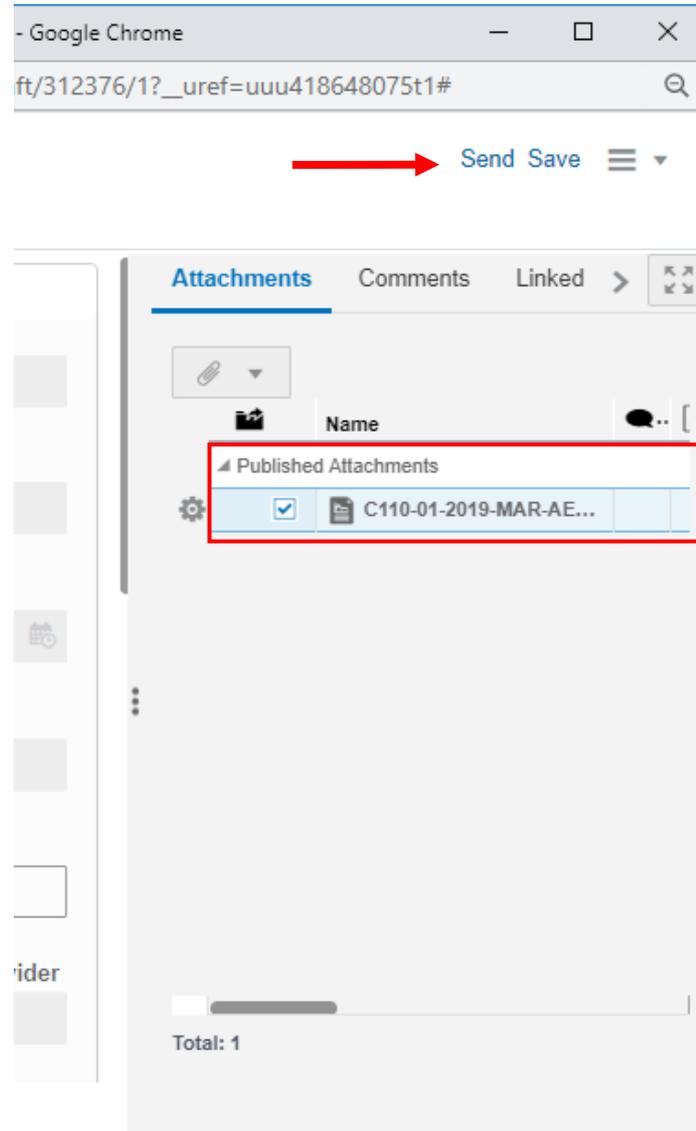


Add Attachments

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**



Submit Record

- ▶ Verify Workflow Action: **Submit**
- ▶ You must now choose the person to send the record to
- ▶ Click the Select button and choose the appropriate person
- ▶ Use the arrow button to move the name from available to selected
- ▶ Click **Done**

The screenshot displays two overlapping windows from a web application. The background window is titled 'Create New Work Assignments - Project No. SFC-130888 - Google Chrome' and shows the 'Workflow Action Details' dialog. In this dialog, the 'Workflow Actions' dropdown is set to 'Submit', which is highlighted with a red box. Below it, the 'To' field contains 'Matthew Weber'. A red circle highlights the 'Select' button (a person icon) next to the name. The foreground window is titled 'Create New Professional Services Pay Request - Project No. OCI-100001 - Google Chrome' and shows the 'User and Group Picker' dialog. This dialog has a 'View' dropdown set to 'Groups'. Under 'Users and Groups > Project Manager', there are two tables. The 'Available Items' table lists several users, with 'Matthew Weber' highlighted in blue and a red box around the row. A red arrow points to the right-pointing arrow button next to this row. The 'Selected Items' table shows 'Matthew Weber' has been moved to the selected list. At the bottom right of the dialog, the 'Done' button is circled in red.

Available Items	First Name	Last Name
Consultant Student5	Consultant	Student5
Consultant Student6	Consultant	Student6
Consultant Student7	Consultant	Student7
Consultant Student8	Consultant	Student8
Consultant Student9	Consultant	Student9
Matthew Weber	Matthew	Weber
Ishauna hooks	shauna	hooks

Selected Items	Name	Company
Users	Matthew Weber	State of Ohio

Submit Record

- ▶ Click Send

The screenshot shows a web browser window titled "Create New Work Assignments - Project No. SFC-130888 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7529/1?__uref=uuu860121972t10". The main content is a "Workflow Action Details" modal window. Under the "Action Details" section, the "Workflow Actions" dropdown is set to "Submit". The "Send For" field is "Planner Review". The "To" field contains "Matthew Weber" with a close button. The "CC" field is empty with the placeholder text "Start typing for suggestions...". Under the "Due Date Details" section, 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, there are two buttons: "Cancel" and "Send". The "Send" button is circled in red, and a red arrow points to it from the right side of the screen.

Work Assignment Amendment

Work Assignment Amendment

- ▶ If a Work Assignment was created in error or amounts need updated, a Work Assignment Amendment can be created.

Amend a Work Assignment

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Work Assignments
 - ▶ Click Create

ORACLE PRIMAVERA Unifier (Development)

Agency: SAO Consultant... OFCC Specialty...

Agency > Ohio Facilities Co... > OFCC Special...

Work Assignments

+ Create Actions View All Records

Title	Vendor
Trotwood LSD Assessment	Harris
Trotwood LSD Assessment	Harris
Amended Trotwood Madison LSD	Harris
Trotwood LSD Assessment	Harris
Champion LSD Assessment	Harris
Kings Local RPC Amendment	Resou
Fix it fast (Recalled)	Resou
Strongsville City RPC	Resou
Northridge LSD (Montgomery)	Resou
Licking Heights LSD	Resou
Kings Local RPC	Resou
RPC	Resou
Fix it fast	Resou
Akron stuff for RPC	Resou
Amhurst EVSD RPC	Resou
Toledo Segment 1 AUP-KCR	Amazi

Total: 18

Amend a Work Assignment

- ▶ If you require a change to a Work Assignment, you will create a new Work Assignment, repeating the process described in this job aid with a few important differences:

- ▶ When filling out the form, put the word **“Amended”** in with the Original title
- ▶ In the “Request Type” section, choose **“Amended”**
- ▶ **Scroll down screen- Complete all required fields**

Create New Work Assignments - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7544/1?_uref=uuu275216655t16

Create New Work Assignments

General Standard

General

Organization Record Number

Project Number SFC-130888 Creator shauna hooks

Project Name OFCC Specialty Consultant List Creation Date

Title *

Champion High School Amended

Harrison Planning Group - Faciliti... Amended

Vendor Name Harrison Planning Group Type of Services * Educational Planning

EDGE Certified Prime? Service Category Select

District Champion Local SD

Building Name(s)

District Location

District Contact Bill Bland District Contact Phone 634-555-5555

OFCC Contact * Bill Brown OFCC Contact Phone * 614-555-5555

CM Contact CM Contact Phone

Amend a Work Assignment

- ▶ **Scroll down screen-
Complete all required
fields**

Create New Work Assignments

General Standard

Enter upto 4000 characters. For longer descriptions, drawings, or spreadsheets use an Attachment.

Details of Requested Consulting Service

Must give money back to the original SOV line, did not use all 15,000 dollar

Budgeted amount must also be entered on the lower form to make work assignment available on the vendors pay request.

Start Date	Completion Date
10/02/2020 	10/02/2020 
Budget Estimate (Not to be Exceeded)	
<input type="text" value="\$0.00"/>	

These fields are autopopulated based on workflow actions.

OFCC Signature	OFCC Action	OFCC Action Date
----------------	-------------	------------------

Form Completion

- a) Click the **Standard** tab to modify original work assignment line items
- b) Click **Add**

The screenshot shows a web browser window titled "Create New Work Assignments - Project No. SFC-130888 - Google Chrome". The URL is "http://ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7524?__uref=uuu860121972t10". The page title is "Create New Work Assignments".

Annotation 'a' points to the "Standard" tab in the "General" section, which is circled in red. The "Standard" tab is the active tab.

Annotation 'b' points to the "Add" button in the toolbar, which is also circled in red. The toolbar includes buttons for "Add", "Actions", "Refresh", "Print", "Search", and "Help".

Below the toolbar is a table with the following columns: "No.", "Reference", "WBS Code", and "Code Name". The table is currently empty.

At the bottom of the page, there is a "Total Amount" field showing "0.00" and a "Total: 0" label.

On the right side of the page, there is an "Information" section with a blue 'i' icon and the text: "Details of the line item is not available. Select a line item to view the details."

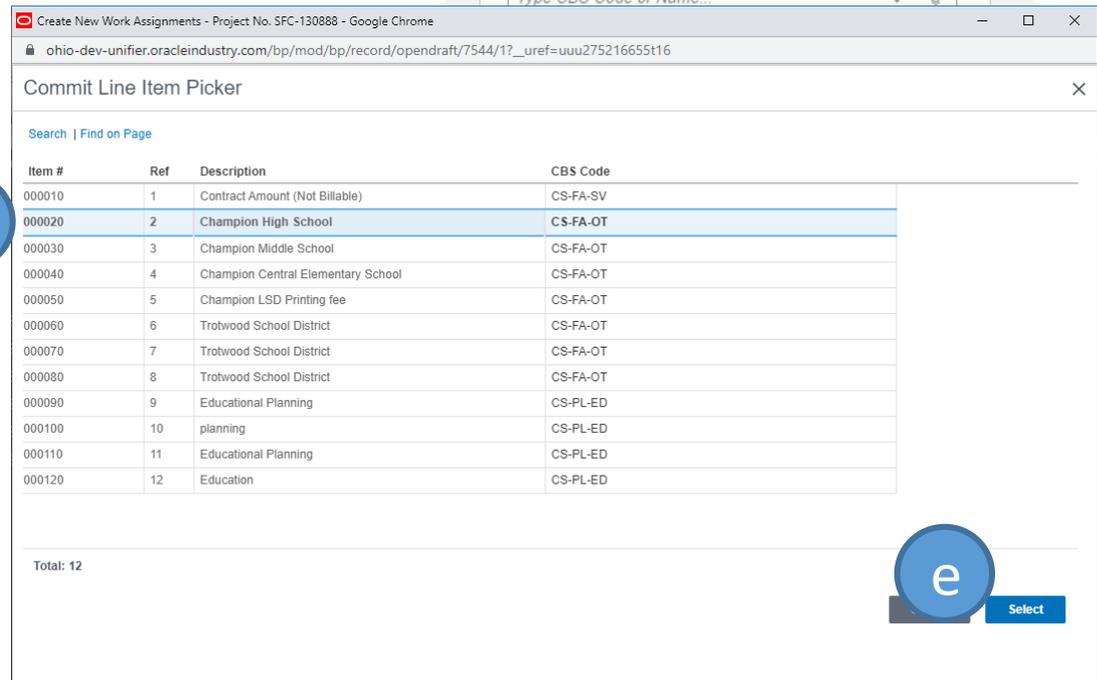
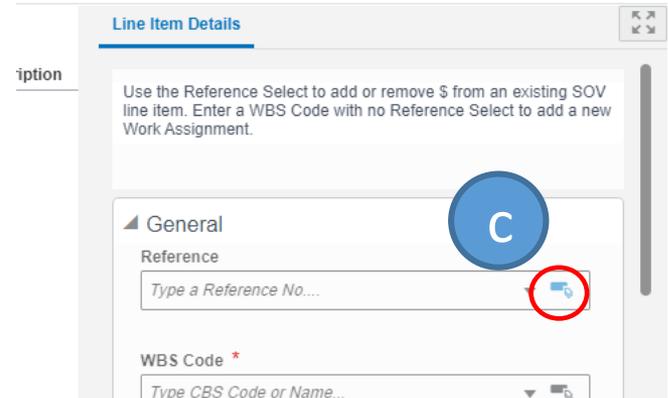
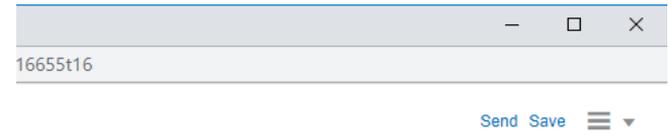
Amendment Form Completion

In the upcoming example I will remove money from the Champion High School assignment and give it back to the SOV/Contract (Not Billable line)

Add Line Items

- ▶ The first line I will remove money from Champion High School

- c) Click the Select button next to Reference
- d) Choose Line
- e) Click **Select**



Add Line Items

- ▶ Scroll down and complete form, in my example I am taking 5,000 away from Champion High School
- ▶ Click **Save and Add New**

The screenshot shows a software window titled "Line Item Details". The form contains the following fields:

- District: Champion Local SD
- Item Quantity: 1
- Units: Amount
- Item Unit Cost: (\$5,000.00)
- Amount (\$): (\$5,000.00)

At the bottom of the form, there are three buttons: "Cancel", "Save", and "Save & Add New". A red arrow points to the "Save & Add New" button.

Add Line Items

- ▶ I will now give money back to the Contract /SOV (Not Billable line)

- f) Click the Select button next to Reference
- g) Choose Line
- h) Click **Select**

16655t16

Send Save

Line Item Details

Use the Reference Select to add or remove \$ from an existing SOV line item. Enter a WBS Code with no Reference Select to add a new Work Assignment.

General

Reference
Type a Reference No.... Select

WBS Code *
Type CBS Code or Name... Select

Create New Work Assignments - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7544/1?_uref=uuu275216655t16

Commit Line Item Picker

Search | Find on Page

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
000120	12	Education	CS-PL-ED

Total: 12

Select

Add Line Items

- ▶ Scroll down and complete form, in my example I am now giving the 5,000 dollars that I previously took from Champion High School and giving it to the Contract/SOV line
- ▶ Click **Save**

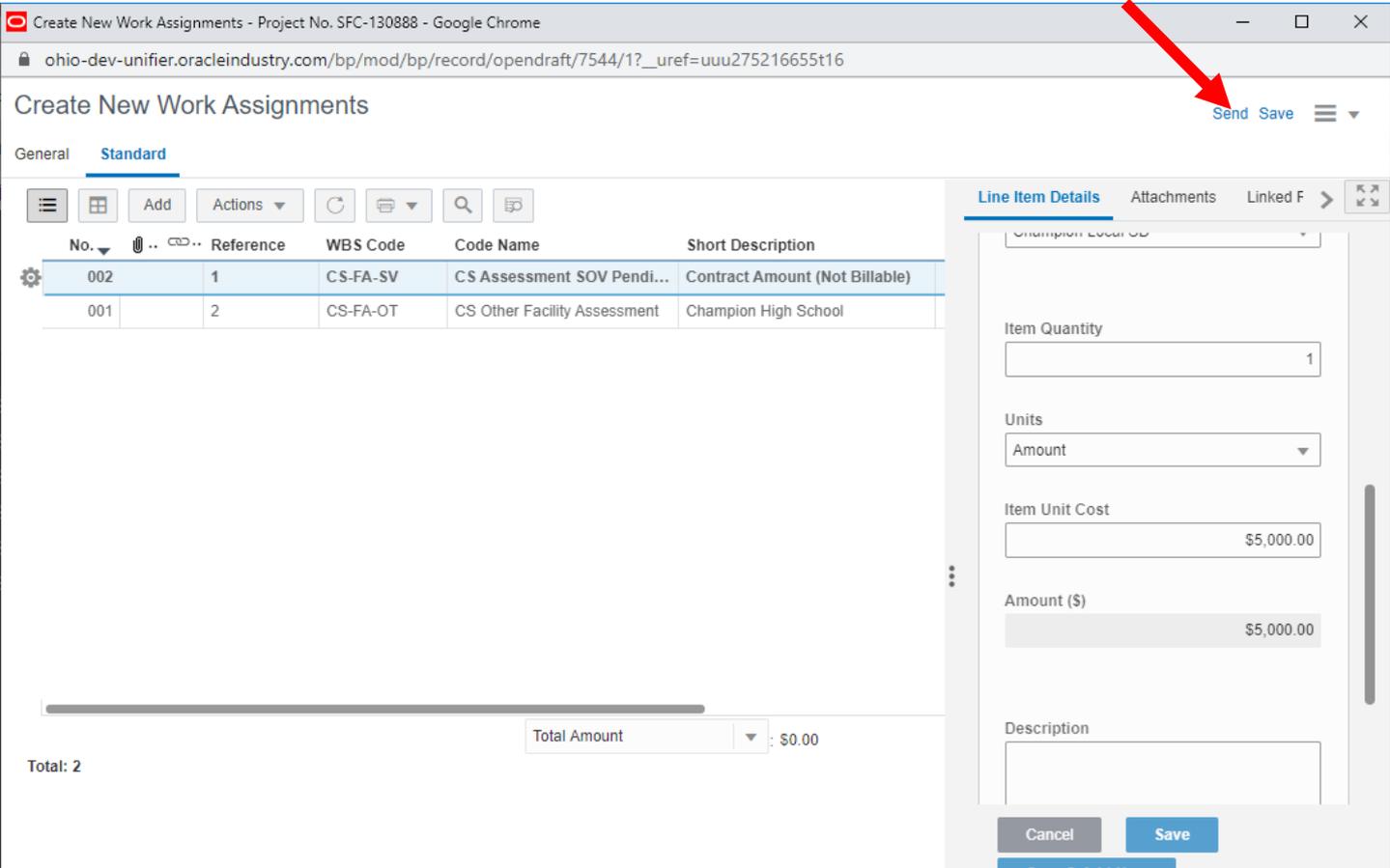
The screenshot shows a software window titled "Line Item Details" with a standard Windows-style title bar (minimize, maximize, close). Below the title bar, there are "Send" and "Save" buttons, along with a menu icon. The main form area contains the following fields:

- A dropdown menu at the top with "Champion Level 00" selected.
- "Item Quantity" input field with the value "1".
- "Units" dropdown menu with "Amount" selected.
- "Item Unit Cost" input field with the value "\$5,000.00".
- "Amount (\$)" input field with the value "\$5,000.00".
- A "Description" text area at the bottom.

At the bottom of the form, there are three buttons: "Cancel", "Save", and "Save & Add New". A red arrow points to the "Save" button.

Submit Record

Click **Send**



Create New Work Assignments - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7544/1?_uref=uuu275216655t16

Create New Work Assignments

General **Standard**

Line Item Details Attachments Linked F

No.	Reference	WBS Code	Code Name	Short Description
002	1	CS-FA-SV	CS Assessment SOV Pendi...	Contract Amount (Not Billable)
001	2	CS-FA-OT	CS Other Facility Assessment	Champion High School

Total: 2

Total Amount: \$0.00

Item Quantity: 1

Units: Amount

Item Unit Cost: \$5,000.00

Amount (\$): \$5,000.00

Description:

Send Save

Submit Record

- 1) Click Select button
- 2) Double Click User
- 3) Click Done
- 4) Click Send

Workflow Action Details

Action Details

Workflow Actions *
Submit

Send For
Planner Review

To
Start typing for suggestions...

CC
Start typing for suggestions...

Due Date Details

Task Due Date

Create New Work Assignments - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7544/1?__uref=uuu275216655t16

User and Group Picker

View Users/Groups

Users and Groups

Available Items	
Name	Company
CS Consultant Student2	State of Ohio
CS Consultant Student3	State of Ohio
CS Consultant Student4	State of Ohio
CS Consultant Student5	State of Ohio
CS Consultant Student6	State of Ohio
CS Consultant Student7	State of Ohio
CS Consultant Student8	State of Ohio
CS Consultant Student9	State of Ohio
Gatekeeper	
Matthew Weber	State of Ohio
Steve Mayo	State of Ohio
shauna hooks	State of Ohio

Total: 16

Cancel Done

Workflow Action Details

Action Details

Workflow Actions *
Submit

Send For
Planner Review

To
shauna hooks

CC
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211