



Approve Facility Assessor Pay Request

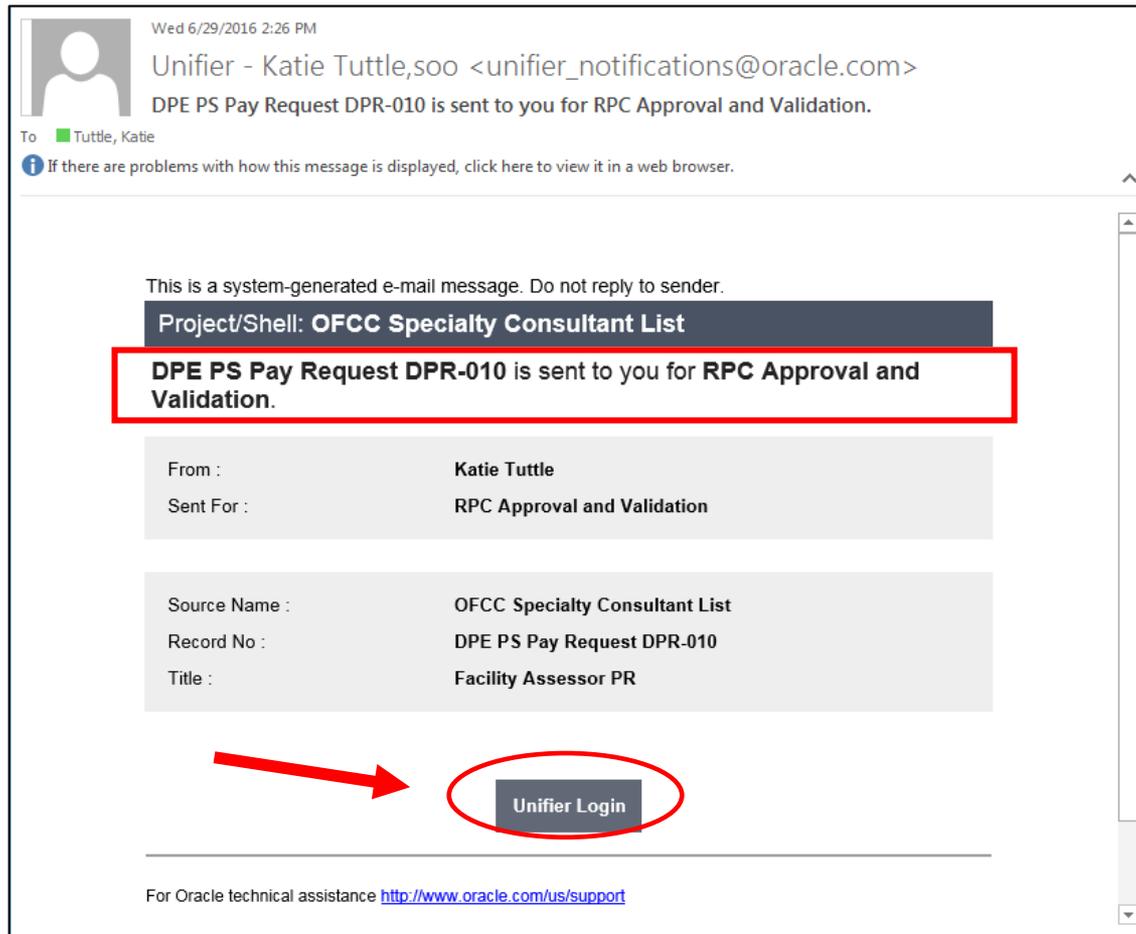
RPC Consultants

Process

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

Receive an Email

- ▶ You will receive an email notification that you have a DPE PS Pay Request for Review
- ▶ Click the link provided to access the Task



Task Access

- ▶ When in the system, click on Tasks, then click the Gear icon next to the task to open it

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier (Development)', and the user name 'Katie Tuttle'. The breadcrumb trail shows the path: 'Company Work...' > 'Agency' > 'SAO Consultant...' > 'OFCC Specialty...'. The left sidebar contains a navigation menu with items such as 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', and 'Reports'. The 'Tasks' menu item is circled in red. The main content area shows a 'Tasks' table with columns for 'Origin', 'Business Process', 'Record Number', and 'Title'. A context menu is open over the second task, with the 'Open' option highlighted by a red box and a red arrow. The right sidebar displays 'Record Details' for the selected task, including fields for 'Organization', 'Project Number', 'Project Name', 'Title', 'Requested By', 'Status', 'Contract Reference', 'Request Type', 'Vendor Name', 'Type of Services', and 'Service Category'.

Origin	Business Process	Record Number	Title
OFCC Specialty Con...	DPE PS Pay Req...	DPR-010	Harrison Planning...
OFCC Specialty Con...	Work Assignments	WA-0019	Educational Plann...

Field	Value
Organization	Ohio Facilities Construction Commission
Record Number	WA-0019
Project Number	SFC-130888
Creator	Katie Tuttle
Project Name	OFCC Specialty Consultant List
Creation Date	07/05/2017 08:35 AM (UTC-8)
Title	Educational Planning FY18
Requested By	Status Pending
Contract Reference	Harrison Planning Group - Facilities Assessment
Request Type	Original
Vendor Name	Harrison Planning Group
Type of Services	Educational Planning
EDGE Certified Prime?	Service Category

Task Action

- ▶ Click “Accept Task” button

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

- Browser Tab:** DPE PS Pay Request - Trotwood Madison 65% - Project No. SFC-130888 - Google Chrome
- URL:** ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/udppr/12/0/0?srcid=12&model=udppr&fromcostlog=1&project_id=1040&nfl=0&_ur...
- Page Title:** DPE PS Pay Request
- Navigation:** Accept Decline (The 'Accept' button is circled in red, and a red arrow points to it from the instruction above.)
- Section:** General Pay Request Details
- Task Details:**
 - From:** Matthew Weber
 - To:** Consultant Student1; Consultant Student10; Consultant Student11; Consultant Student12...
 - Sent For:** Approval and Validation
- General Information:**

Organization	Record Number
	DPR-012
Project Number	Creator
SFC-130888	Matthew Weber
Project Name	Creation Date
- Attachments:** Information icon, Information, No Attachments.

Review the Record

- ▶ Review the Upper (general) and Lower (Pay Request Details) forms of the Pay Request

The image displays two screenshots of the 'DPE PS Pay Request' application interface. The left screenshot shows the 'General' tab selected, and the right screenshot shows the 'Pay Request Details' tab selected. Both tabs are circled in red.

General Tab (Left Screenshot):

Review the pay request to confirm the work has been properly completed. Select the appropriate work flow action and click Send.

General

Organization	Record Number
	DPR-012
Project Number	Creator
SFC-130888	Matthew Weber
Project Name	Creation Date
OFCC Specialty Consultant List	10/01/2020 12:51 PM (UTC-5)
Project Location	Status
OFCC	Pending
Title	Internal Ref. Number
Trotwood Madison 65%	

Pay Request Details Tab (Right Screenshot):

Pay Request Details

View Currency Transaction Currency

No.	SOV R...	WBS Code	District	Service Category
002	0	CS-FA-OT	Trotwood-Madison Cit...	Facility Asses...
001	0	CS-FA-OT	Trotwood-Madison City ...	Facility Asses...

Total: 2 Total Amount : 3,355.00

Line Item Details

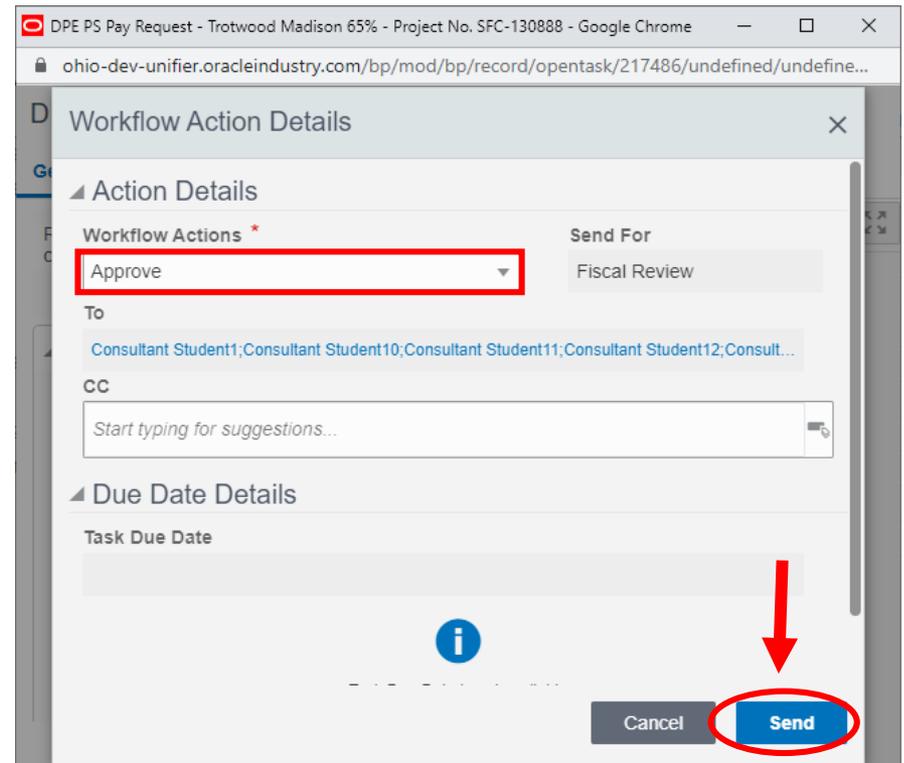
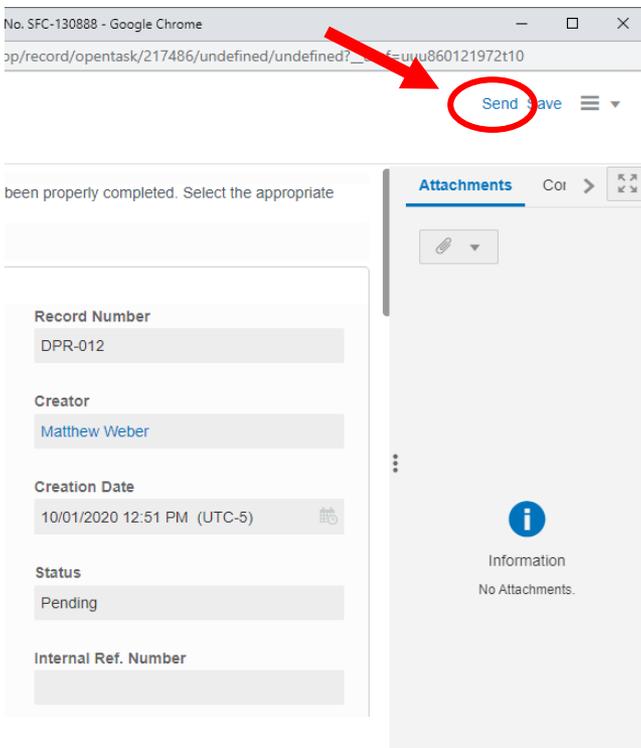
Use the WBS Code select to identify the Work Assignment related to this payment then enter the details. You may import records from a spreadsheet.

General

SOV Reference Number
0
WBS Code
CS-FA-OT
Code Name
CS Other Facility Assessment
District
Trotwood-Madison City SD

Approve the Pay Request

- ▶ If everything on the Pay Request record is correct, click Send at the top of the record
- ▶ Choose the Workflow Action: Approve
- ▶ Click Send



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211