



Create Work Assignments (Contract Modification or PS Amendment) When Using Neutral Facilitators

Creating a Work Assignment

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Contract Modifications or Change Order
 - ▶ Click Create
 - ▶ Choose “Work Assignment” workflow

The screenshot shows the Primavera Unifier web interface. The browser address bar displays the URL: <https://ohio-stage-unifier.oracleindustry.com/bp/route/4>. The page title is "PRIMAVERA Unifier (Development)". The navigation menu on the left includes "Logs", which is circled in red. A red arrow points from the text "Choose 'Work Assignment' workflow" to the "Logs" menu item. The "Logs" menu is expanded, showing "Contract Modifications" highlighted in red. A red circle highlights the "+ Create" button in the top right of the "Contract Modifications" view. A dropdown menu is open from the "+ Create" button, showing options: "Allocation Adjustment", "PS Amendment Data Entry", "PS Amendments v3", and "Work Assignment", with "Work Assignment" highlighted in red. Below the menu is a table with columns "CO No" and "Vendor Na". The table contains 6 rows of data, with the first row highlighted in blue. The total number of items is 6.

CO No	Vendor Na
AE-FM	MD Arch
AE-FMD-CO-2	FMD Arch
AE-FMD-CO-2	FMD Arch
AE-FMD-CO-1	FMD Arch
AE-FMD-CO-2	
AE-FMD-CO-1	

Total: 6

Form Completion

- ▶ Enter all relevant information into the general form
- ▶ Items with a red * are required

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=161925&id=6317&sourceid=0&project_id=1095&fromdraftlog=tr...

File Edit View Actions Help

Workflow Actions Make Assignment Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification K12

This work flow creates Work Assignments for Neutral Facilitators. No amendment documents are executed. Complete the upper form and add one or more work items to the lower form. The items on the lower form will be available on the vendor's pay request after the district processes this record.

General

Project Number:	<input type="text" value="SFC-130329"/>	Record Number:	<input type="text"/>
Project Name:	<input type="text" value="Brown-LSD-CAR-ENP-2012"/>	Creator:	<input type="text" value="Katie Tuttle"/>
Organization Name:	<input type="text" value="Brown LSD"/>	Creation Date:	<input type="text"/>
		Status:	<input type="text"/>
Title:	<input type="text" value="Facilitation Work"/> *		
Contract Reference:	<input type="text" value="SFC-130329-AE01"/> <input type="button" value="Select..."/> *	Contractor Name:	<input type="text" value="FMD Architects Inc."/>
Change Order Type:	<input type="text" value="Work Assignment"/>	Trade:	<input type="text"/>
Change Order No.:	<input type="text" value="001"/> *	EDGE Certified Prime?:	<input type="text" value="No"/>

Change Order Details

Description of Work: *

Action Details

Line Item List

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Form Completion

- ▶ Scroll down to complete the remainder of the general form
- ▶ Then click the Line Item List tab to identify the work to be assigned

The screenshot shows a web browser window titled "Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome". The address bar shows a URL from "ohio-stage-unifier.oracleindustry.com". The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with "Workflow Actions", "Make Assignment", "Send", "Save", "Spelling..", "Add Attachment", "Discussion", "SOV", and "Close Window".

The main content area is titled "Contract Modification K12" and has a "General" tab selected. It contains several sections:

- Notes:** A large text area for entering notes.
- Funding Summary:** Includes "Co-Funded Amount (\$): \$2,000.00" and "LFI Amount (\$): \$0.00".
- Amended Contract Amounts:** Includes "Contract Amount Before Amendment (\$): \$20,000.00" and "Contract Amount After Amendment(\$): \$22,000.00".
- Change Order Cost and Time Impact:** Includes "Total Amount (\$): \$2,000.00 *", "Line Item Total (\$): \$0.00", and "Difference (\$): \$2,000.00".
- Document Publishing:** A section for document management.

At the bottom, there are tabs for "Action Details" and "Line Item List". The "Line Item List" tab is circled in red. Below the tabs are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Add Line Items

- ▶ In the Line Item List tab, click the Add Button

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=161925&id=6317&sourceId=0&project_id=1095&fromdraftlog=tr...

File Edit View Actions Help

Workflow Actions Make Assignment Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification K12

Action Details

Line Item List

Current View: All

0 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Sup
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Add Copy Import Remove Grid Find Show Filtered Total Amount Total Amount: \$0.00

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Add Line Items

- ▶ Click the arrow next to WBS code

Line Item - Google Chrome

Secure | <https://ohio-stage-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=fo...>

Spelling... Attach Delete Line Item

Contract Modification K12 Line Item:

General

To deduct from an existing line, select the item in the Reference field. Enter the change in value in the Amount (\$) field. To add a new line item leave Reference blank, select the WBS code, and complete the form.

Reference:

WBS Code: *

Code Name:

Short Description: *

Amount (\$): *

Subcontractor/Supplier:

LFI Percent:

District: ▼

Associated Building:

Details

EDGE Certified Prime Contractor?:

Subcontractor/Supplier Name:

Attachments (0) [Linked Records \(0\)](#)

Add Line Items

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

WBS Picker - Google Chrome

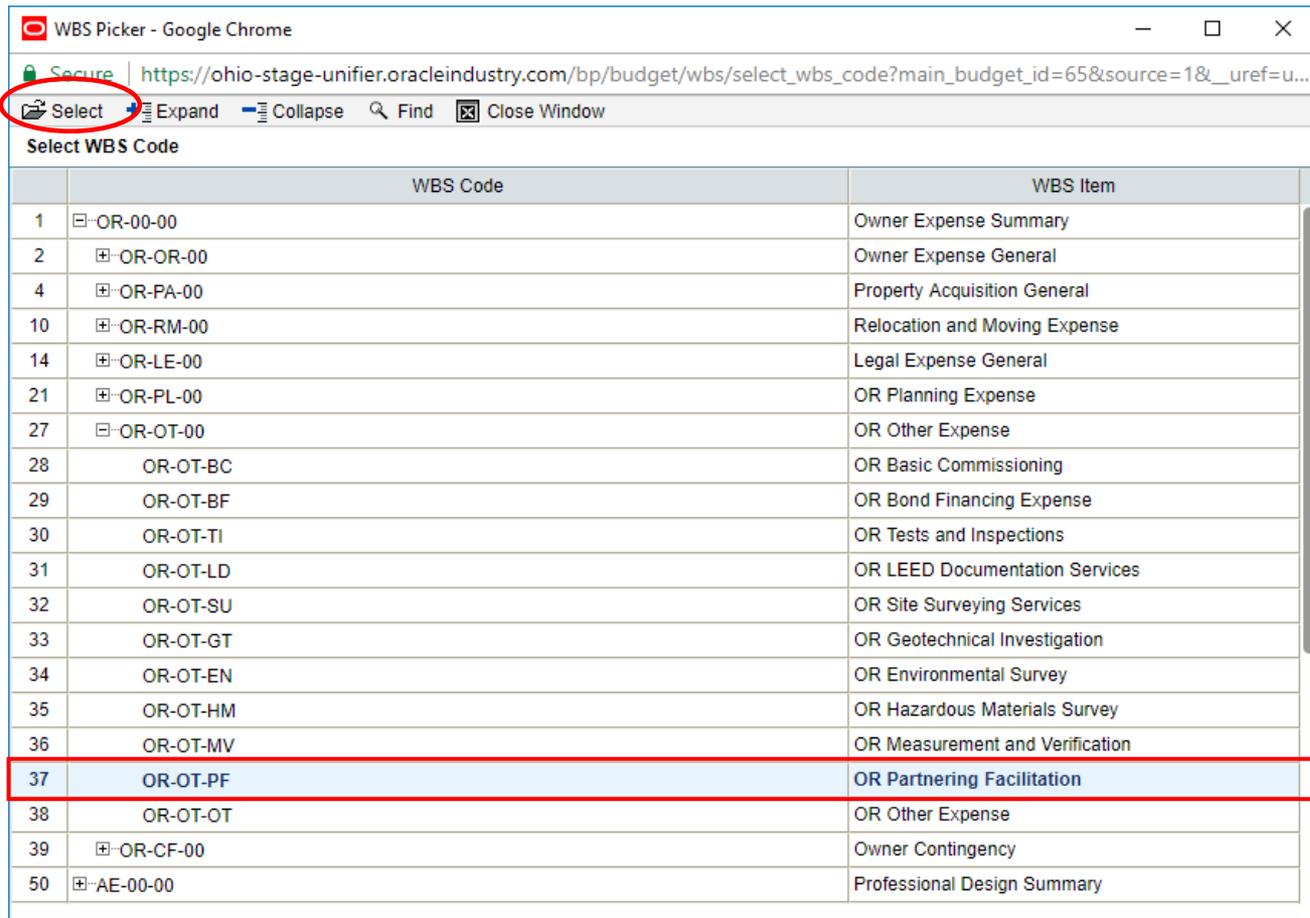
https://ohio-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_code?main_budget_id=993&source=1

Select WBS Code

	WBS Code	WBS Item
1	CS-00-00	Consultant Services Summary
2	CS-FN-00	CS Financial Services Summary
3	CS-FN-SV	CS Financial SOV Pending
4	CS-FN-AU	CS Project Auditing Services
5	CS-FN-FR	CS Final Reconciliation Services
6	CS-FN-OT	CS Other Financial Services
7	CS-LE-00	CS Legal Services Summary
8	CS-LE-SV	CS Legal SOV Pending
9	CS-LE-AC	CS Claims Analysis
10	CS-LE-MD	CS Legal Mediation
11	CS-LE-OT	CS Other Legal Expense
12	CS-NF-00	CS Neutral Facilitation Services Summary
13	CS-NF-SV	CS Facilitation SOV Pending
14	CS-NF-PF	CS Partnering Facilitation
15	CS-NF-OMS	cs Organizational Meeting Facilitation
16	CS-NF-CH	CS Charrette Facilitation
17	CS-NF-EF	CS Eco Charrette Facilitation
18	CS-NF-BP	CS BIM Execution Plan Facilitation
19	CS-NF-GA	CS GMP Amendment Facilitation
20	CS-NF-OT	CS Other Facilitation Services
21	CS-PL-00	CS Planning Services Summary
22	CS-PL-SV	CS Planning SOV Pending
23	CS-PL-MP	CS Master Planning Service
24	CS-PL-ED	CS Educational Planning Service
25	CS-PL-RP	CS Regional Planning Service
26	CS-PL-ER	CS Enrollment Projection Service
27	CS-PL-DM	CS Design Manual Update Service
28	CS-PL-TR	CS Planning Training or Coaching

Add Line Items

- ▶ Now use the (+) buttons to expand the codes
- ▶ Choose the appropriate WBS code for the work to be provided and click Select



WBS Picker - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_code?main_budget_id=65&source=1&_uref=u...

Select Expand Collapse Find Close Window

Select WBS Code

	WBS Code	WBS Item
1	OR-00-00	Owner Expense Summary
2	OR-OR-00	Owner Expense General
4	OR-PA-00	Property Acquisition General
10	OR-RM-00	Relocation and Moving Expense
14	OR-LE-00	Legal Expense General
21	OR-PL-00	OR Planning Expense
27	OR-OT-00	OR Other Expense
28	OR-OT-BC	OR Basic Commissioning
29	OR-OT-BF	OR Bond Financing Expense
30	OR-OT-TI	OR Tests and Inspections
31	OR-OT-LD	OR LEED Documentation Services
32	OR-OT-SU	OR Site Surveying Services
33	OR-OT-GT	OR Geotechnical Investigation
34	OR-OT-EN	OR Environmental Survey
35	OR-OT-HM	OR Hazardous Materials Survey
36	OR-OT-MV	OR Measurement and Verification
37	OR-OT-PF	OR Partnering Facilitation
38	OR-OT-OT	OR Other Expense
39	OR-CF-00	Owner Contingency
50	AE-00-00	Professional Design Summary

Add Line Items

- ▶ WBS Code information will populate into the form
- ▶ Enter a Short Description for the work to be provided
- ▶ Enter the amount of the Work Assignment
- ▶ Click “Save & Close” to finish

Line Item - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=fo...

Spelling... Attach Delete Line Item

Contract Modification K12 Line Item:

General

To deduct from an existing line, select the item in the Reference field. Enter the change in value in the Amount (\$) field. To add a new line item leave Reference blank, select the WBS code, and complete the form.

Reference: Select...

WBS Code: *

Code Name:

Short Description: *

Amount (\$): *

Subcontractor/Supplier: Select...

LFI Percent:

District:

Associated Building: Select...

Details

EDGE Certified Prime Contractor?:

Subcontractor/Supplier Name:

Attachments (0) [Linked Records \(0\)](#)

Save & Close Save & Add New Cancel

Add Line Items

- ▶ The work is now populated in the line item list

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/new?copy=1&attach=true&fromModel=ucmk&fromSource=cost&fromModelId=58&wftemplate_id...

File Edit View Actions Help

Workflow Actions: Make Assignment | Send | Save | Spelling.. | Add Attachment | Discussion | SOV | Close Window

General Contract Modification K12

Action Details

Line Item List

Current View: All

1 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Supp
001	0	OR-OT-PF	OR Partnering Facilitation	Document Review	\$2,000.00	0	

Add | Copy | Import | Remove | Grid | Find

Show Filtered Total Amount Total Amount: \$2,000.00

Attachments (0) | [Linked Records \(0\)](#) | [General Comments](#) | [Linked Mail \(0\)](#)

Submit Work Assignment

- ▶ You will now submit the Work Assignment to the Facilitator for their review and approval
- ▶ Verify Workflow Action
- ▶ Click the “To” button to choose the Facilitator you need to send to

The screenshot displays a web application interface for a 'Contract Modification K12 - Facilitation Work' project. The main window shows a 'Workflow Actions' menu with 'Make Assignment' selected. Below this, the 'Action Details' section is visible, featuring a 'Make Assignment' form. The 'To...' field in this form is circled in red, and a red arrow points from it to a 'User/Group Picker' modal window. The modal window is titled 'User/Group Picker - Google Chrome' and shows a search results table for 'Users/Groups'. The table has columns for 'Name' and 'Company'. The first row is highlighted in blue and contains the text 'Katie Tuttle' and 'State of Ohio'. The second row contains 'Neutral Facilitator'. Below the table, there are buttons for 'Add', 'View Profile', and 'Members'. At the bottom of the modal, there is a 'Selected Users/Groups' section with a 'Name' dropdown menu.

Name	Company
Katie Tuttle	State of Ohio
Neutral Facilitator	

Submit Work Assignment

- ▶ Recipients name will now appear in the “to” field
- ▶ Click Send

The screenshot shows a web browser window titled "Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome". The address bar shows a URL from "ohio-stage-unifier.oracleindustry.com". The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". Below the menu bar, a toolbar contains several icons and labels: "Workflow Actions", "Make Assignment" (with a dropdown arrow), "Send" (with an envelope icon), "Save", "Spelling..", "Add Attachment", "Discussion", "SOV", and "Close Window". A red box highlights the "Workflow Actions", "Make Assignment", and "Send" buttons. A red arrow points from the "Send" button to the "To..." field in the "Make Assignment" form. The "Make Assignment" form is also highlighted with a red box and contains the following fields: "To..." with the value "Katie Tuttle", "Cc..." (empty), and "Send For:" with the value "Vendor Acceptance". To the right of the form, there are sections for "Task Notes:" and "Workflow Progress:". At the bottom of the page, there are tabs for "Line Item List", "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Facilitator Acceptance

- ▶ Facilitator will receive an email notifying them that they have a task to complete in OAKS CI
- ▶ Click the link provided to access your task

Mon 8/28/2017 10:21 AM

Unifier - Katie Tuttle,soo <unifier_notifications@oracle.com>
Contract Modification K12 CM-0003 is sent to you for Vendor Acceptance.

To: Tuttle, Katie

If there are problems with how this message is displayed, click here to view it in a web browser.

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

Project/Shell: **Brown-LSD-CAR-ENP-2012**

Contract Modification K12 CM-0003 is sent to you for Vendor Acceptance.

From : **Katie Tuttle**
Sent For : **Vendor Acceptance**

Source Name : **Brown-LSD-CAR-ENP-2012**
Record No : **Contract Modification K12 CM-0003**
Title : **Facilitation Work**

Unifier Login

For Oracle technical assistance <http://www.oracle.com/us/support>

Facilitator Acceptance

- ▶ Click Accept Task to begin reviewing the Work Assignment

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161945&parent_id=0&viewOnly=0&project_id=1095&__uref=uuu5:navigator-4

File Edit View Actions Help

Accept Task Decline Task SOV Review Close Window

Contract Modification K12

General

General

Project Number: SFC-130329 Record Number: CM-0004
Project Name: Brown-LSD-CAR-ENP-2012 Creator: Katie Tuttle
Organization Name: Brown LSD Creation Date: 08/28/2017 08:00 AM (UTC-8)
Status: Pending

Task Details

From: [Katie Tuttle](#) Task Due Date: Task Notes (0)
To: [Katie Tuttle](#) Task Status: [Not Started](#) Workflow Progress
Cc:
Sent For: **Vendor Acceptance**

Line Item List

Current View: All Show Currency in: Transaction Currency

1 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Supp
001	0	OR-OT-PF	OR Partnering Facilitation	Document Review	\$2,000.00	0	

Grid Find Show Filtered Total Amount Total Amount: \$2,000.00

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Facilitator Acceptance

- Review information in the General tab and Line Item List tab

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161945&parent_id=0&viewOnly=0&project_id=1095&__uref=uuu5:navigator-4

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

General Contract Modification K12

You have received a new Work Assignment related to this project. Please review the details and take the workflow action 'Accept Assignment' or 'Return for Clarification.' Per your Agreement, no Amendment document will be processed. The items on the lower form will be available on the vendor's pay request after the district processes this record.

General

Project Number: SFC-130329 Record Number: CM-0004

Project Name: [REDACTED] Creator: Katie Tuttle

Action Details

(Click here to view latest content)

To... [REDACTED]

Cc... [REDACTED]

Send For:

Line Item List

Current View: All Show Currency in: Transaction Currency

1 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Supp
001	0	OR-OT-PF	OR Partnering Facilitation	Document Review	\$2,000.00	0	

Add Copy Import Remove Grid Find

Show Filtered Total Amount Total Amount: \$2,000.00

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Facilitator Acceptance

- ▶ Accept the record by choosing the Workflow Action: Accept Assignment. Record then goes to the District Treasurer for PO.
- ▶ Click Send

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161945&parent_id=0&viewOnly=0&project_id=1095&_uref=uuu5:navigator-4

File Edit View Actions Help

Workflow Actions: Accept Assignmer, Send, Save, Spelling.., Add Attachment, Discussion, SOV, Review, Close Window

General: Accept Assignment, Return for Clarification

Contract Modification K12

You have received a new Work Assignment related to this project. Please review the details and take the workflow action 'Accept Assignment' or 'Return for Clarification.' Per your Agreement, no Amendment document will be processed. The items on the lower form will be available on the vendor's pay request after the district processes this record.

General

Project Number: SFC-130329 Record Number: CM-0004

Project Name: ... Creator: Katie Tuttle

Action Details

Accept Assignment (Click here to view latest content)

To...: Floyd Claprood, Katie Tuttle, Lindsay Deering, Mi

Cc...:

Send For: PO Creation

Task Notes:

Workflow Progress

Line Item List

Current View: All Show Currency in: Transaction Currency

1 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Sup
001	0	OR-OT-PF	OR Partnering Facilitation	Document Review	\$2,000.00	0	

Add Copy Import Remove Grid Find

Show Filtered Total Amount Total Amount: \$2,000.00

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211