



Introduction to OAKS CI

March, 2020

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*Click the Home button from
any slide to return to this page*



What does OAKS CI do for you?

- ▶ Tracks your project progress
- ▶ Automates workflows (based on Ohio Facilities Construction Commission forms and procedures)
- ▶ Allows for improved project communication and collaboration
- ▶ Housed in the Cloud so you can utilize any browsing tool to access (Chrome recommended)



System Navigation



Browser Information

- ▶ When using the OAKS CI system, we recommend using **Google Chrome** or **Mozilla Firefox**. These browsers will give you the best user experience in the system.



Chrome



mozilla
Firefox[®]

Navigate to OAKS CI

- ▶ Navigate to this URL:
<https://ohio-unifier.oracleindustry.com/bluedoor>
- ▶ Enter your assigned Username and Password
- ▶ Click “Sign In”

Note: Please ensure that your pop-up blocker is disabled for this site

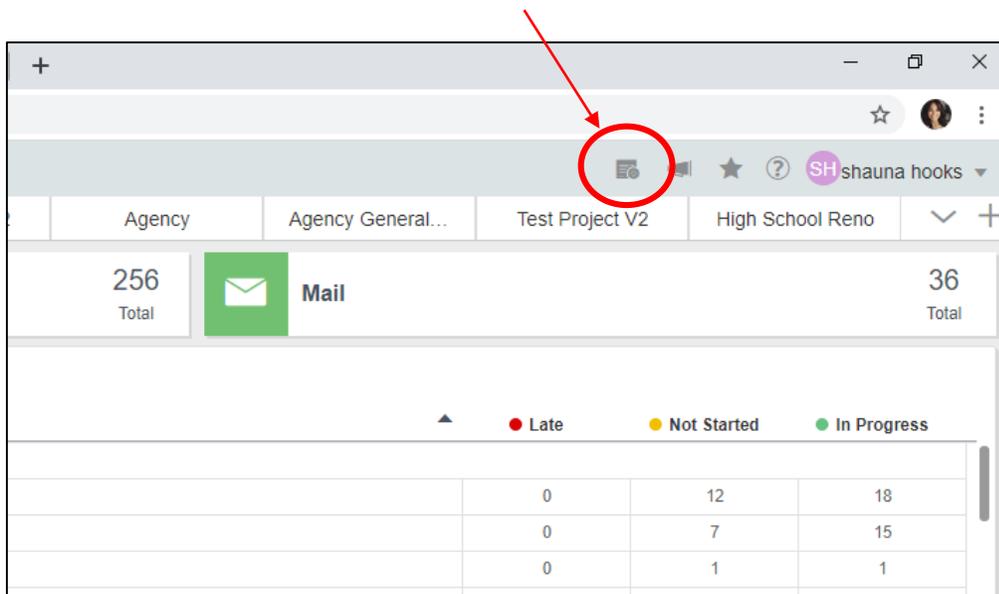


Important Notice – View Changes

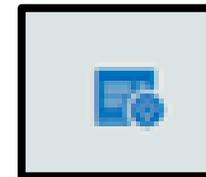
OAKS CI currently has the ability to switch between two different views. Once this functionality is removed, only the New UI View will be available (see next slide).

Currently you can switch between views with the button near the top right of your OAKS CI screen. When clicked, your view will toggle between the **Standard View** and **New UI View**.

Not every page will look different when you change views. Look at the color of the button to determine which view you are currently in:



If the button is gray, the **Standard View** is being displayed



If the button is blue, the **New UI View** is being displayed

New User Interface (UI) View

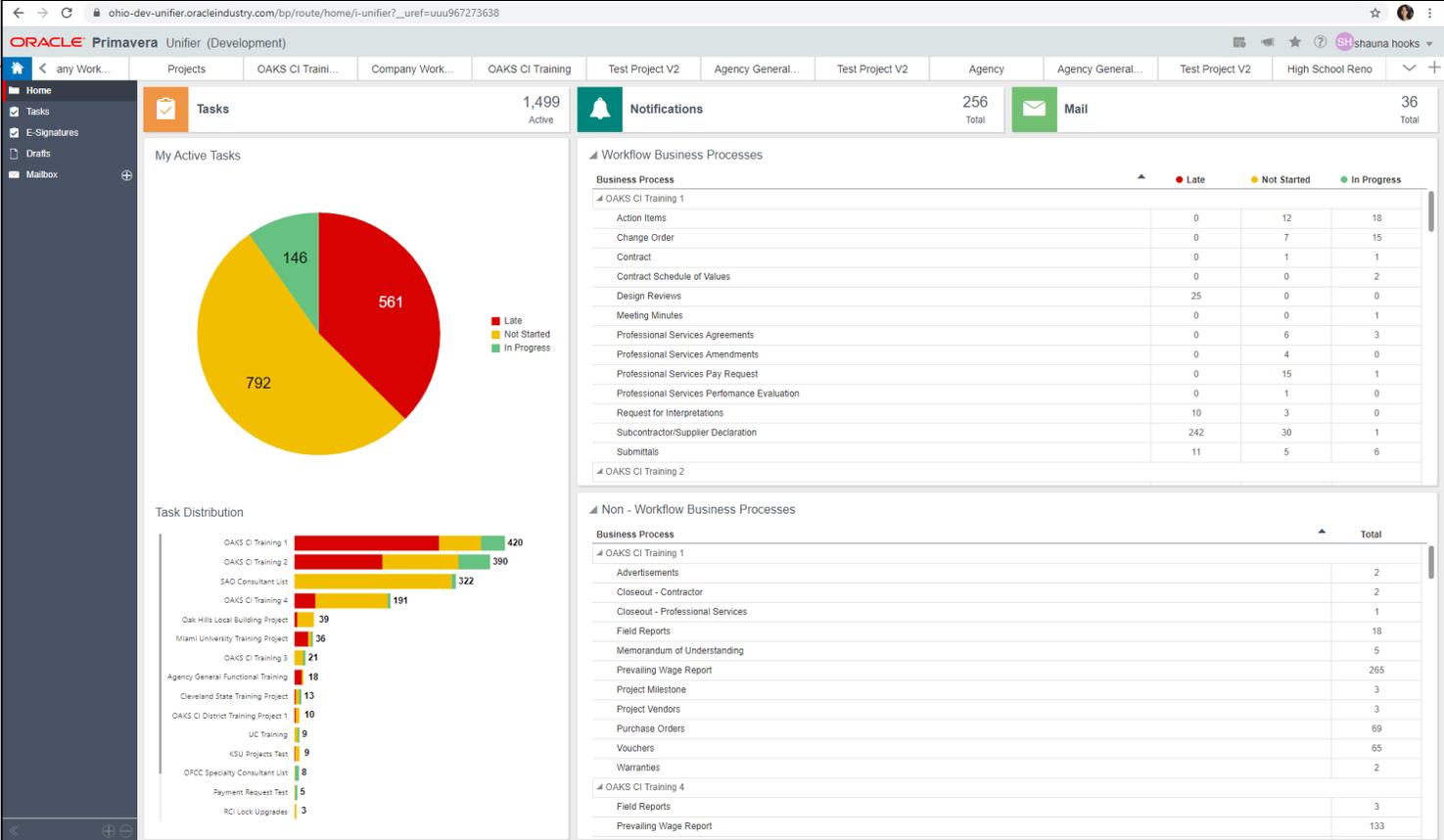
OAKS CI will soon be changing from the Standard View to the New UI View permanently

- ▶ After this change occurs, you will no longer be able to toggle between views
- ▶ Some steps and screen images will be different depending on the view
- ▶ When different, the following slides will show screenshots and steps for the **Current View** and **New View**



Home Page

- ▶ The Home button  is located on the left-hand side of screen
- ▶ Your Home Page allows you to see all tasks for any of your projects



The screenshot shows the Oracle Primavera Unifier Home Page. A red arrow points to the Home button in the left-hand navigation menu. The page displays a 'My Active Tasks' pie chart, a 'Task Distribution' horizontal bar chart, and two tables of 'Workflow Business Processes' and 'Non - Workflow Business Processes'.

My Active Tasks

Status	Count
Late	561
Not Started	792
In Progress	146

Task Distribution

Project	Total
OAKS CI Training 1	420
OAKS CI Training 2	390
SAO Consultant List	322
OAKS CI Training 4	191
Oak Hills Local Building Project	39
Miami University Training Project	36
OAKS CI Training 3	21
Agency General Functional Training	18
Cleveland State Training Project	13
OAKS CI District Training Project 1	10
UC Training	9
KSU Projects Test	9
OPCC Specialty Consultant List	8
Payment Request Test	5
RCI Lock Upgrades	3

Workflow Business Processes

Business Process	Late	Not Started	In Progress
OAKS CI Training 1			
Action Items	0	12	18
Change Order	0	7	15
Contract	0	1	1
Contract Schedule of Values	0	0	2
Design Reviews	25	0	0
Meeting Minutes	0	0	1
Professional Services Agreements	0	6	3
Professional Services Amendments	0	4	0
Professional Services Pay Request	0	15	1
Professional Services Performance Evaluation	0	1	0
Request for Interpretations	10	3	0
Subcontractor/Supplier Declaration	242	30	1
Submittals	11	5	6
OAKS CI Training 2			

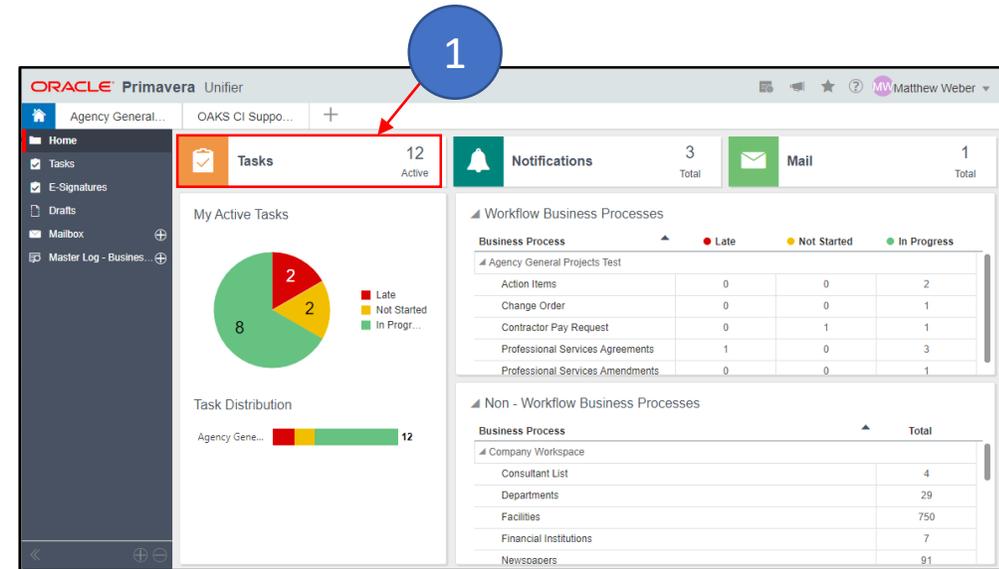
Non - Workflow Business Processes

Business Process	Total
OAKS CI Training 1	
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
Purchase Orders	69
Vouchers	65
Warranties	2
OAKS CI Training 4	
Field Reports	3
Prevailing Wage Report	133

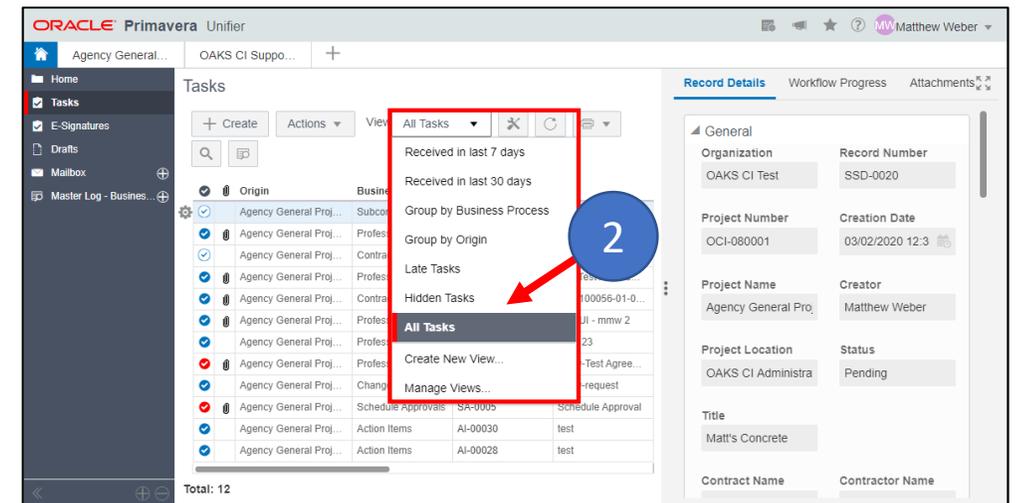


Home Page – Tasks

1. From the Home Page, you can click on Tasks to view tasks for all projects

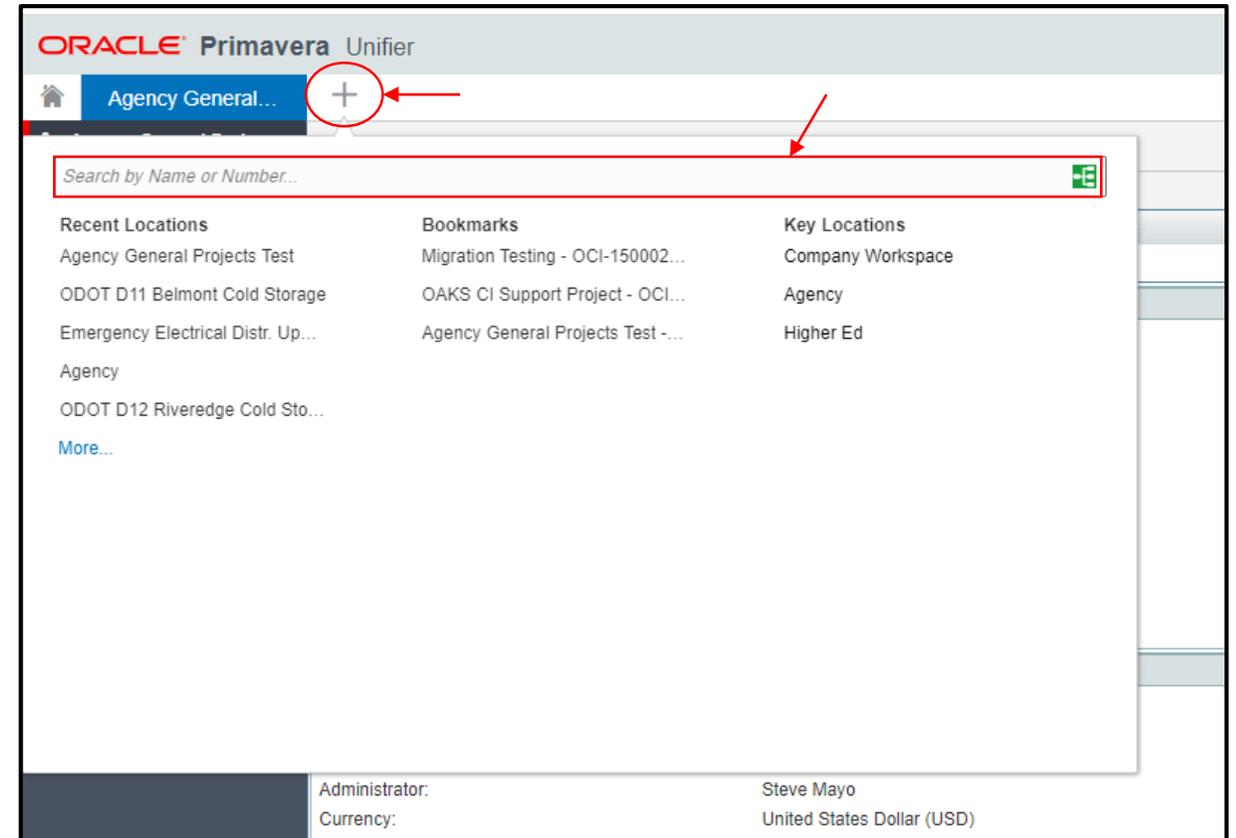


2. **Note:** Your default view shows “Received in the last 7 days”. Change this view to “**All Tasks**” and that will remain your default for all projects.



Find your Project

- ▶ To locate your project, click on the + sign to the right of the home or project tabs
- ▶ In the secondary screen you will see a search box, a list of Recent Locations, Bookmarks, and Key Locations
- ▶ Click inside the search box

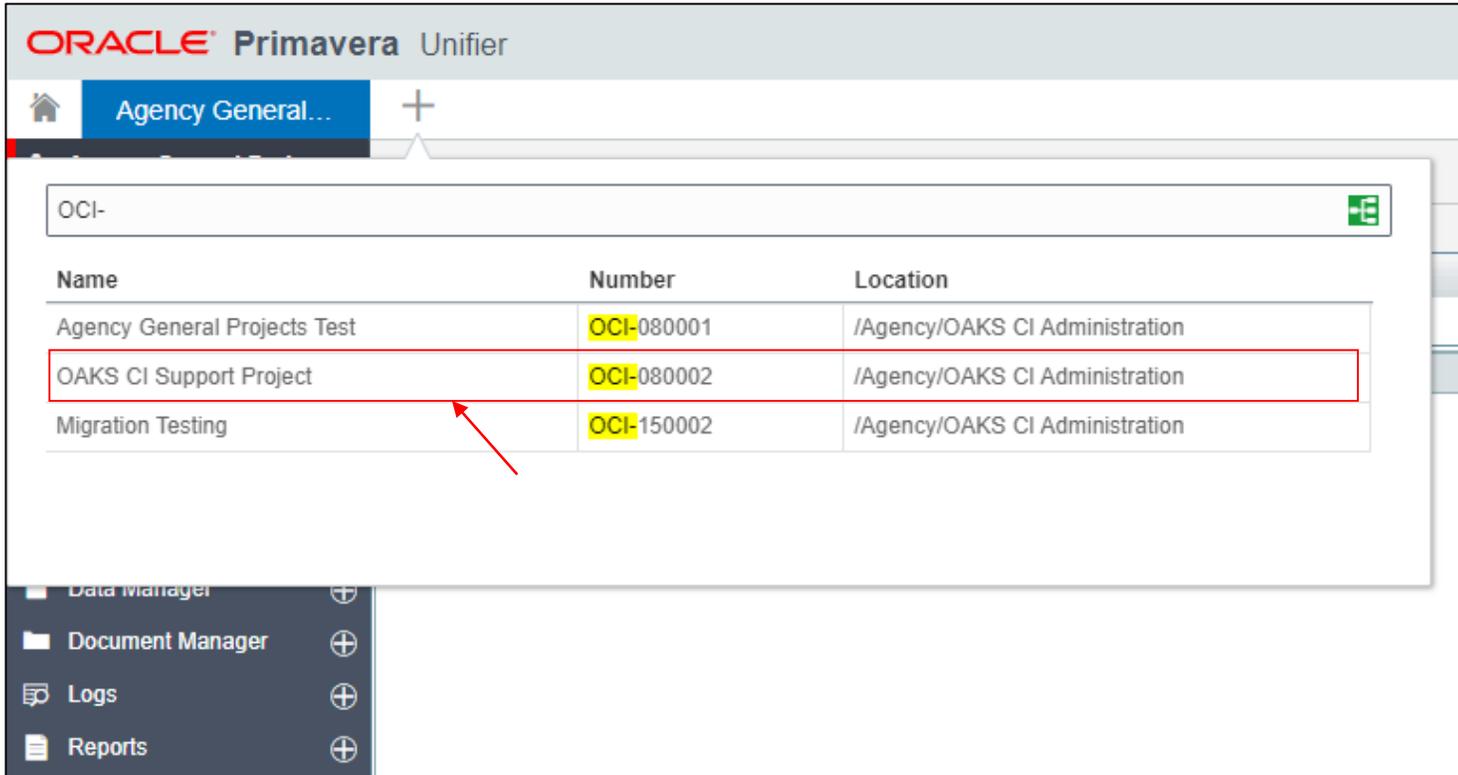


The screenshot displays the Oracle Primavera Unifier interface. At the top, the title bar reads "ORACLE Primavera Unifier". Below the title bar, there is a navigation bar with a home icon and a tab labeled "Agency General...". To the right of this tab is a red plus sign (+) enclosed in a red circle, with a red arrow pointing to it. Below the navigation bar is a search box with the placeholder text "Search by Name or Number...". Below the search box, there are three columns of project locations: "Recent Locations", "Bookmarks", and "Key Locations". The "Recent Locations" column lists "Agency General Projects Test", "ODOT D11 Belmont Cold Storage", "Emergency Electrical Distr. Up...", "Agency", and "ODOT D12 Riveredge Cold Sto...". The "Bookmarks" column lists "Migration Testing - OCI-150002...", "OAKS CI Support Project - OCI...", and "Agency General Projects Test - ...". The "Key Locations" column lists "Company Workspace", "Agency", and "Higher Ed". At the bottom of the interface, there is a footer area with the text "Administrator: Steve Mayo" and "Currency: United States Dollar (USD)".



Find your Project

- ▶ Type the name or number of the project you are searching for
- ▶ The results will begin to auto-populate as you type
- ▶ Click on your project from the list to open it



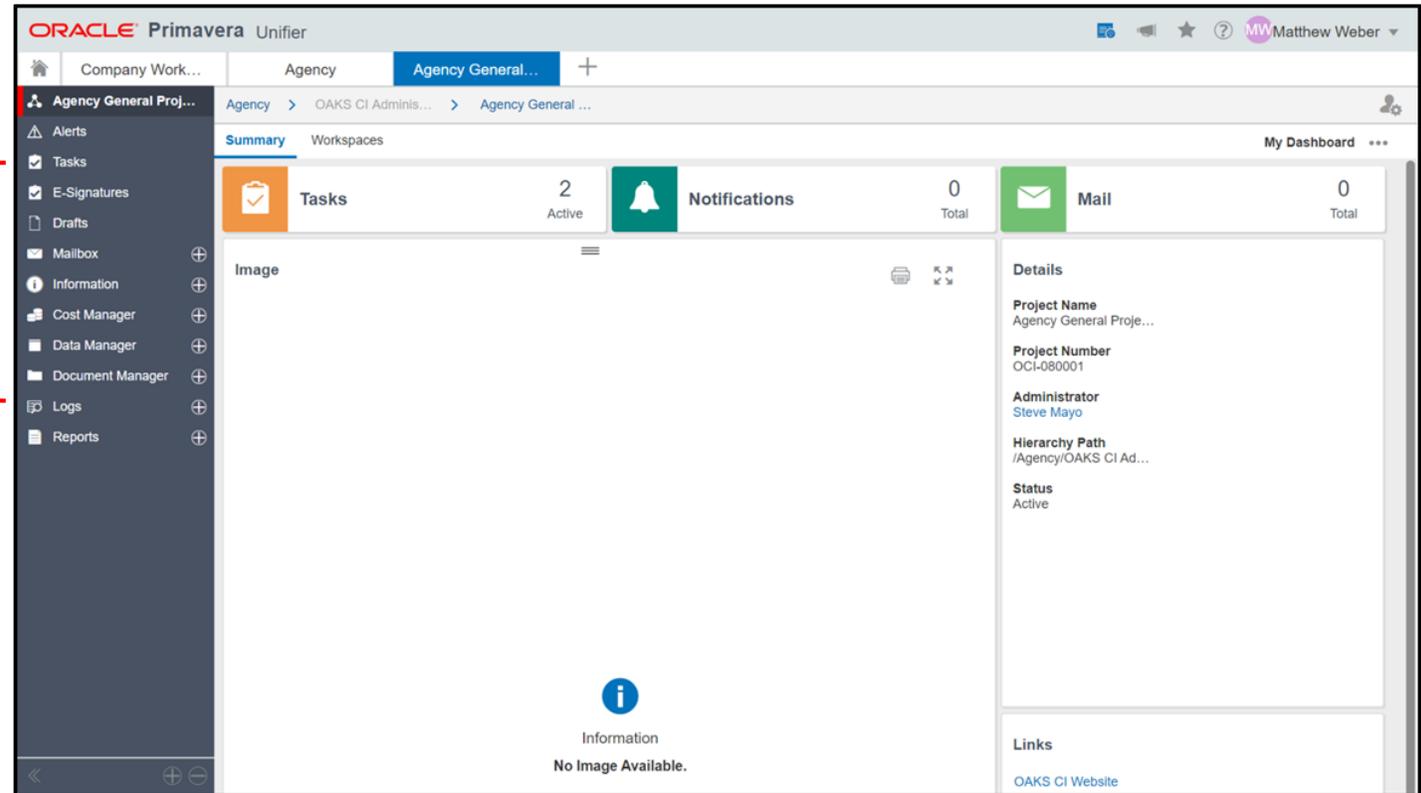
The screenshot shows the Oracle Primavera Unifier interface. At the top, the text "ORACLE Primavera Unifier" is visible. Below this, there is a navigation bar with a home icon and a tab labeled "Agency General...". A search input field contains the text "OCI-". Below the search field, a table displays search results. The table has three columns: "Name", "Number", and "Location". The results are as follows:

Name	Number	Location
Agency General Projects Test	OCH080001	/Agency/OAKS CI Administration
OAKS CI Support Project	OCH080002	/Agency/OAKS CI Administration
Migration Testing	OCH150002	/Agency/OAKS CI Administration

A red box highlights the "OAKS CI Support Project" row, and a red arrow points to it. Below the search results, there is a sidebar with navigation options: "Data Manager", "Document Manager", "Logs", and "Reports", each with a plus icon.

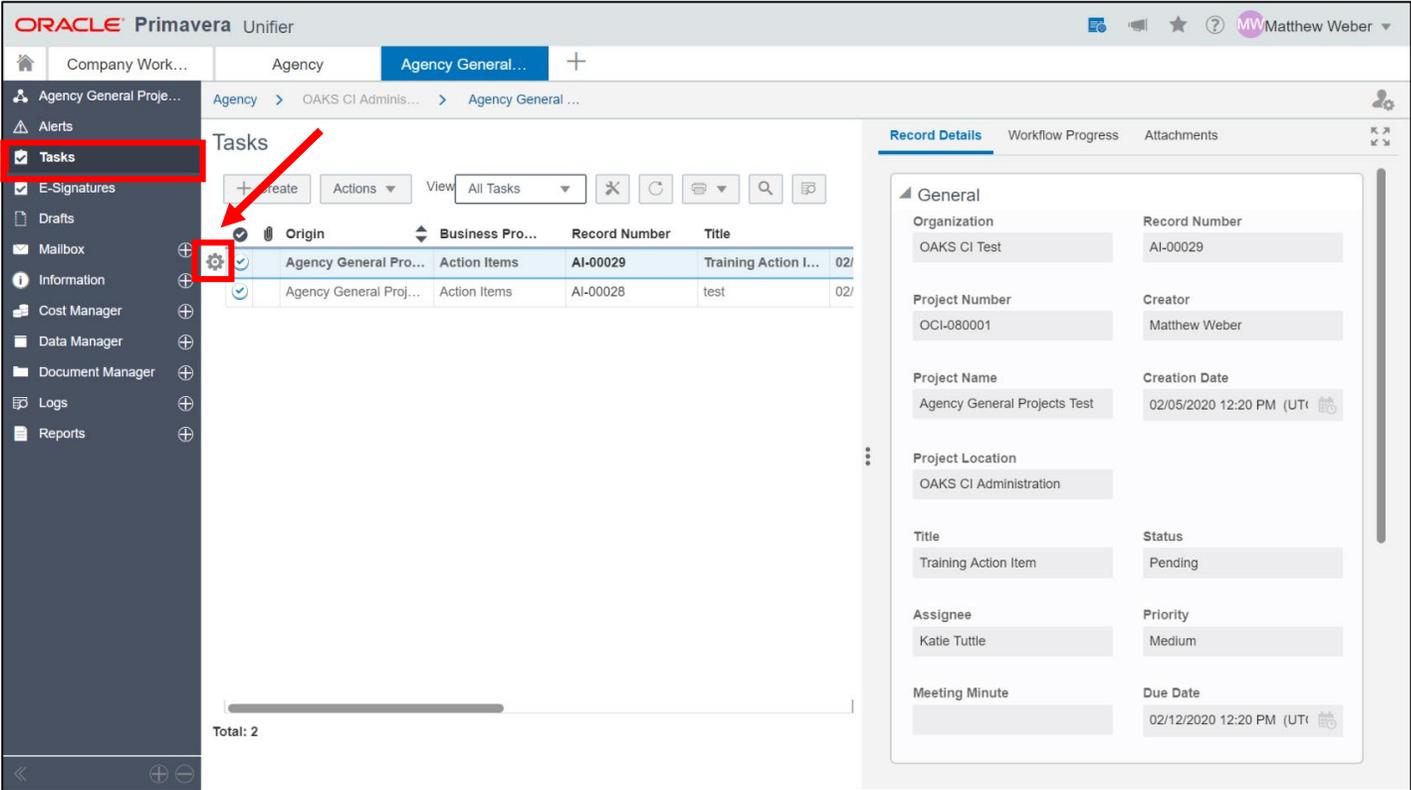
Project Home Page

- ▶ From your Project Home Page, you can navigate to your work and information
- ▶ In the Main Menu, you will see: **Tasks, Mailbox, Drafts, Document Manager, and Logs** (most of your work will be completed in **Tasks** and **Logs**)



Tasks (Your Work)

- ▶ Tasks are records that come to you for your review or approval
- ▶ Use the gear icon  or **double-click** the Task to open it



The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with 'Tasks' highlighted. The main area displays a table of tasks with columns for Origin, Business Process, Record Number, and Title. The 'Record Details' panel on the right shows information for a specific task, including Organization, Record Number, Project Number, Creator, Project Name, Creation Date, Project Location, Title, Status, Assignee, Priority, Meeting Minute, and Due Date.

Origin	Business Pro...	Record Number	Title
Agency General Pro...	Action Items	AI-00029	Training Action I...
Agency General Proj...	Action Items	AI-00028	test

Total: 2

Record Details

General

Organization	Record Number
OAKS CI Test	AI-00029
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	02/05/2020 12:20 PM (UT)
Project Location	
OAKS CI Administration	
Title	Status
Training Action Item	Pending
Assignee	Priority
Katie Tuttle	Medium
Meeting Minute	Due Date
	02/12/2020 12:20 PM (UT)



Mailbox – Notifications

Within your Mailbox you will find Notifications

- ▶ Notifications are any records that you have been carbon copied on
- ▶ You can delete them if you choose
- ▶ ****Meeting Minutes will always be a Notification****

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with items like Alerts, Tasks, E-Signatures, Drafts, Mailbox, Drafts, Inbox, and Notifications (highlighted with a red box and a red arrow). The main content area displays a 'Notifications' section with a table of notifications. The table has columns for Business Process, From, Title, Record Number, and Origin. The table contains three rows of data. To the right of the table is a 'Record Details' panel showing information for a specific record, including Organization, Project Number, Project Name, Project Location, Title, and Contract Information.

Business Pro...	From	Title	Record Number	Origin
Contract Schedul...	Shauna Hooks, soo	Test SOV	CSOV-0008	Agency Gener...
Subcontractor/Su...	Matthew Weber, s...	Matt's Consulting	SSD-0015	Agency Gener...
Action Items	Matthew Weber, s...	Training Action Item	AI-00029	Agency Gener...

Total: 3

Record Details

General

Organization	Record Number
OAKS CI Test	CSOV-0008
Project Number	Creator
OCI-080001	Shauna Hooks
Project Name	Creation Date
Agency General P	02/12/2020 02
Project Location	Status
OAKS CI Administ	Approved
Title	Fee Title
Test SOV	OFCC Standard F

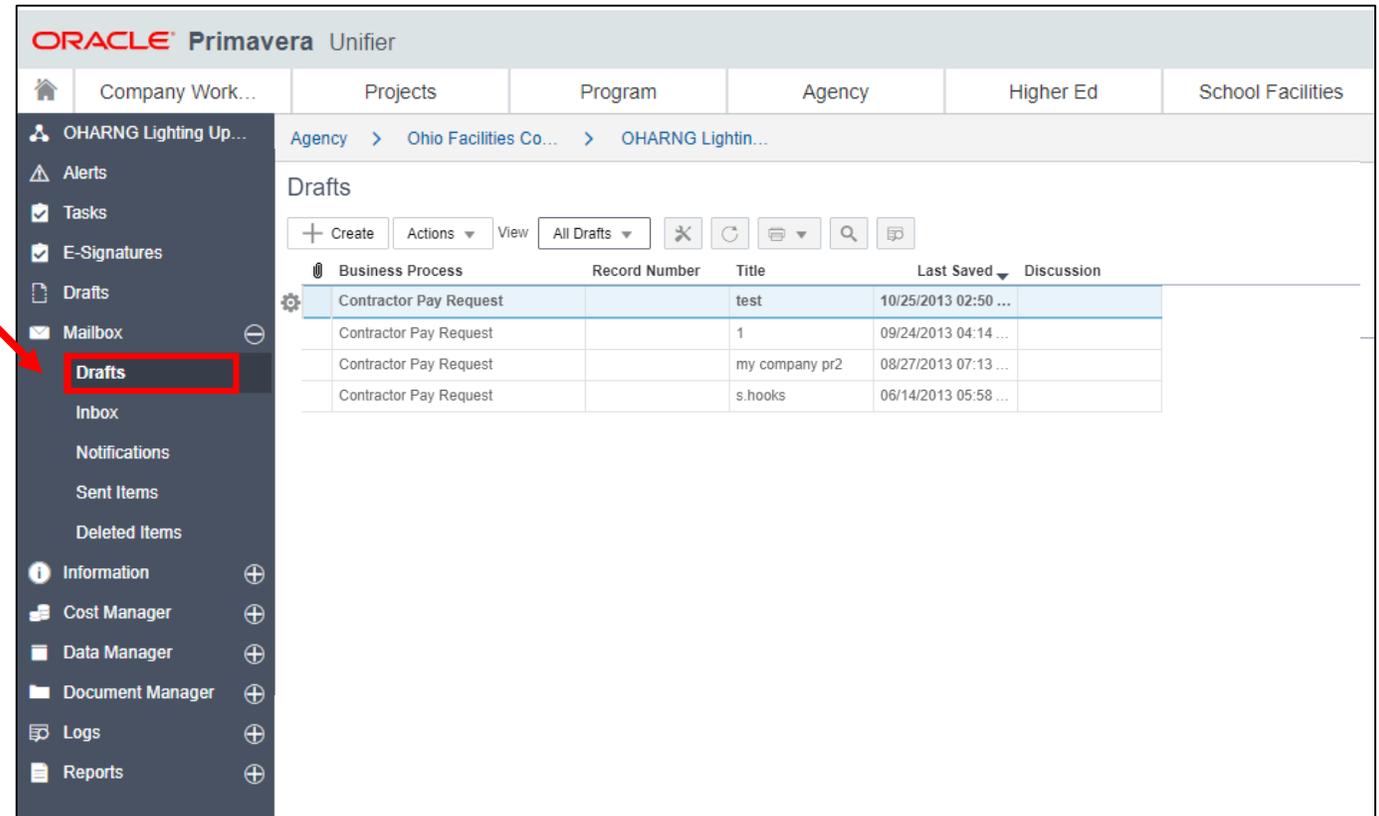
Contract Information

Contract No.	Contractor Name
test	OCI Test General



Mailbox – Drafts

- ▶ Drafts are any unfinished records that you have created and saved for later
- ▶ You can delete any drafts you no longer need



The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes 'ORACLE Primavera Unifier' and several tabs: 'Company Work...', 'Projects', 'Program', 'Agency', 'Higher Ed', and 'School Facilities'. Below this, a breadcrumb trail shows 'Agency > Ohio Facilities Co... > OHARNG Lightin...'. The main content area is titled 'Drafts' and features a table with the following columns: 'Business Process', 'Record Number', 'Title', 'Last Saved', and 'Discussion'. The table contains four rows of draft records, all with the business process 'Contractor Pay Request'. A red arrow points to the 'Drafts' option in the left-hand navigation menu, which is highlighted with a red box.

Business Process	Record Number	Title	Last Saved	Discussion
Contractor Pay Request		test	10/25/2013 02:50 ...	
Contractor Pay Request	1		09/24/2013 04:14 ...	
Contractor Pay Request		my company pr2	08/27/2013 07:13 ...	
Contractor Pay Request		s.hooks	06/14/2013 05:58 ...	



Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

- ▶ All unsaved work will be lost
- ▶ No warning will be given
- ▶ Use the **Save** button to save your work as a Draft

Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you're typing extensive notes, first type them in a Word doc then copy and paste into General Comments.

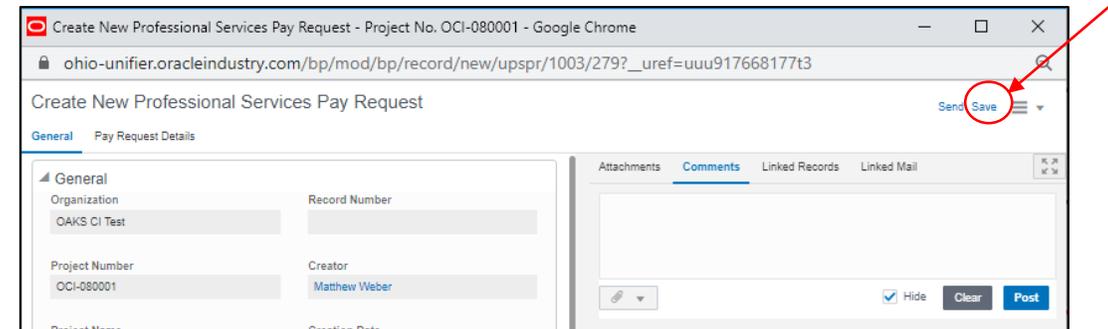
Old View:

Save is found at the top left of the record



New View:

Save is found at the top right of the record



Document Manager Uploading



About Document Manager

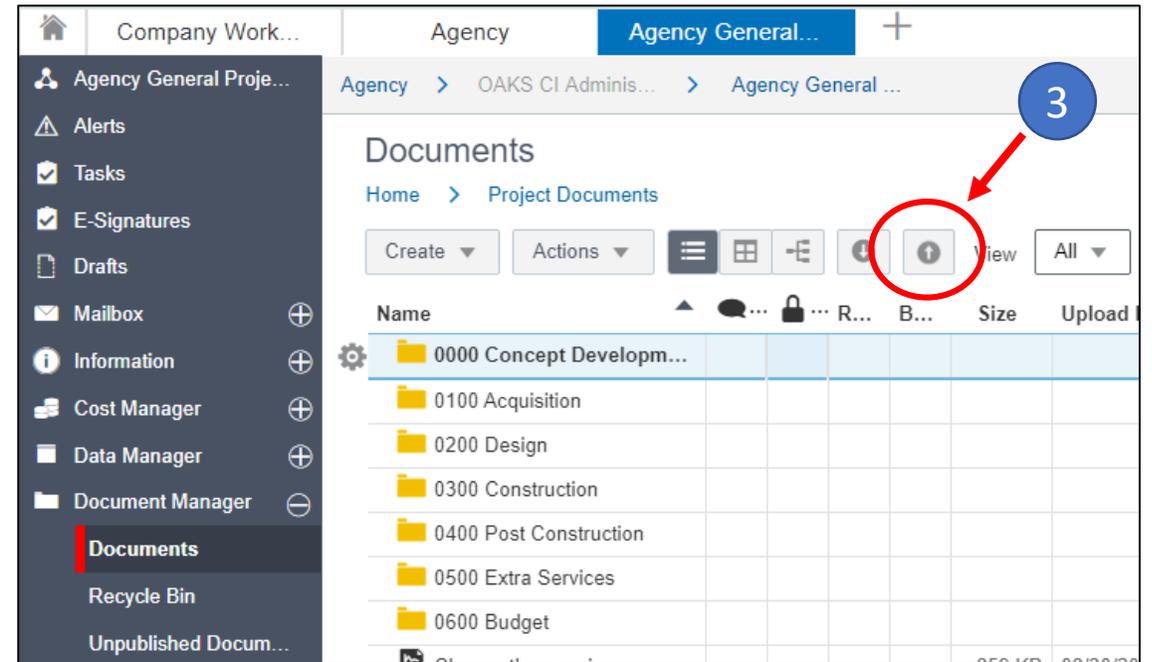
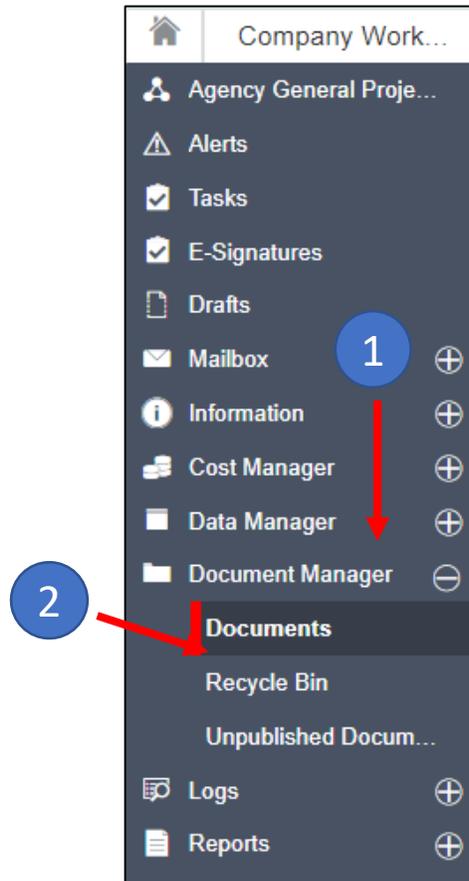
** If you are a School District Project user, you may or may not utilize Document Manager. Please follow up with your Project Manager for guidance.*

- ▶ Document Manager houses all your supporting documentation
- ▶ All documents must be uploaded into Document Manager **first** before they can be attached to a record
- ▶ Provides a platform for maintaining a wide variety of files and documents
- ▶ Ensures that project participants are always working on the most current versions
- ▶ Provides ready access to all documents from anywhere at any time



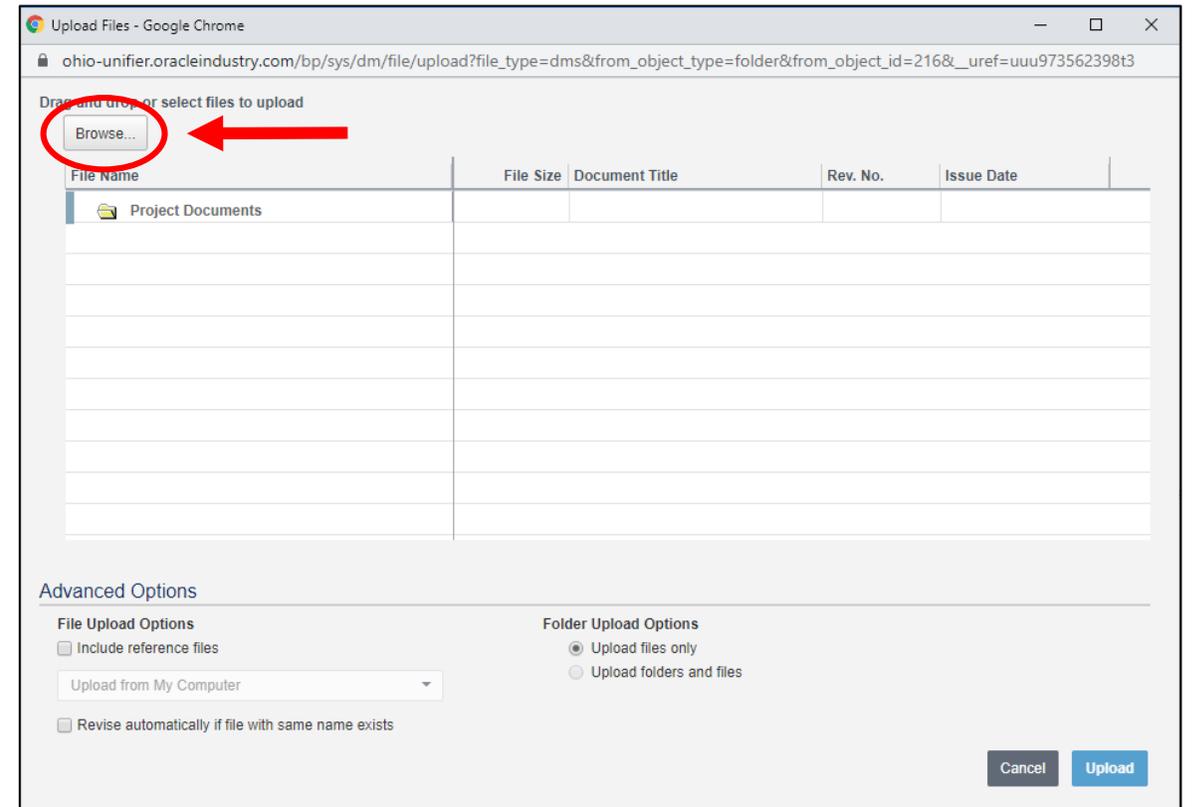
Document Upload

1. Navigate to Document Manager
2. Click on Documents
3. Click the **Upload Arrow** button 



File Upload Window

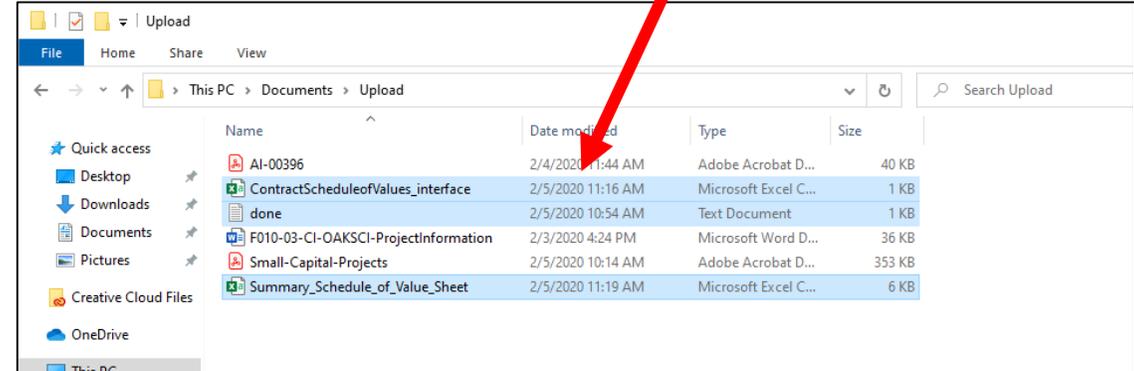
- ▶ A new window will appear for you to add files
- ▶ Click **Browse** to choose files for upload



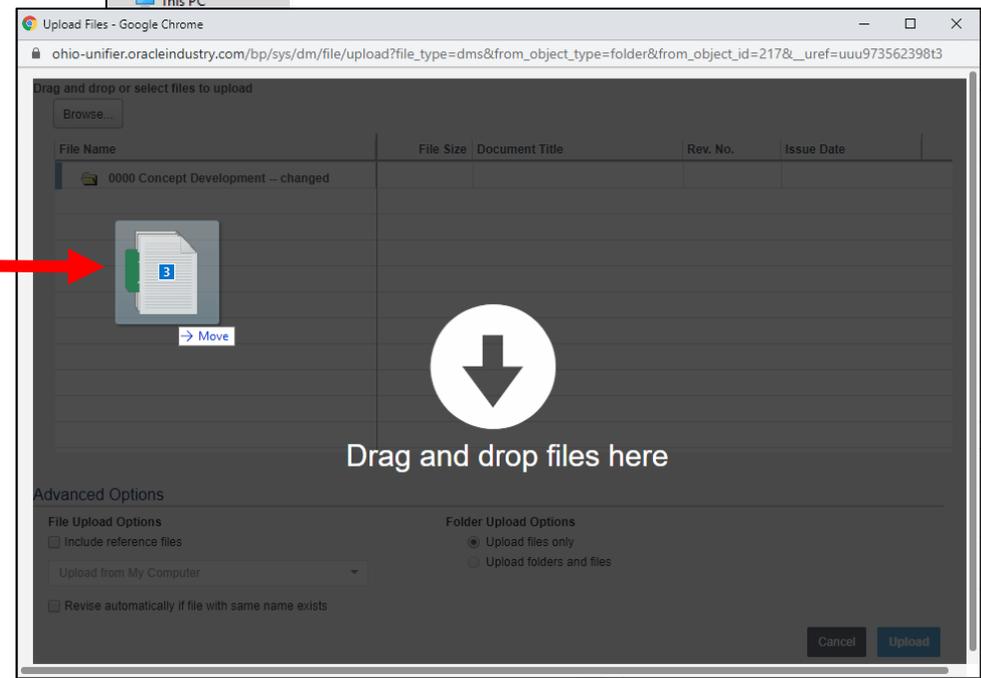
Drag and Drop files

- ▶ Find the document(s) your computer you want to upload
- ▶ Drag and Drop the documents into the Upload Files window

Choose your folder of Documents or Select Multiple Documents

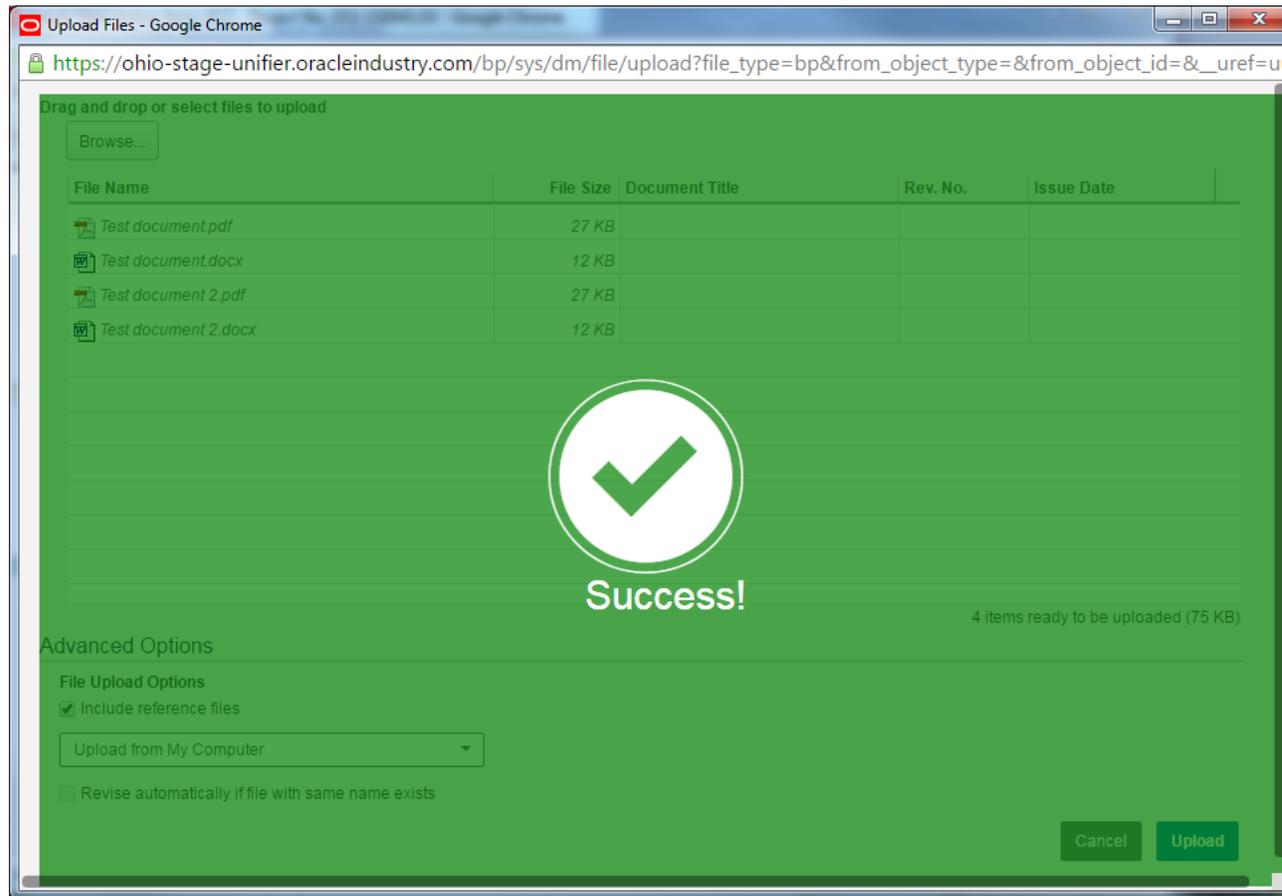


Drag and Drop the documents into the Upload Files window



Adding Documents

- ▶ If all folders and files have been added, you will see a green “Success!” screen



Upload Documents

- ▶ You should see all your documents in the Upload Files window
- ▶ Click **Upload** button

Upload Files - Google Chrome

ohio-unifier.oracleindustry.com/bp/sys/dm/file/upload?file_type=dms&from_object_type=folder&from_object_id=216&_uref=uuu973562398t3

Drag and drop or select files to upload

Browse...

File Name	File Size	Document Title	Rev. No.	Issue Date
Project Documents				
ContractScheduleofValues_interface.csv	1 KB			
done.txt	1 KB			
Summary_Schedule_of_Value_Sheet - Copy.csv	6 KB			

3 items ready to be uploaded (7 KB)

Advanced Options

File Upload Options

Include reference files

Upload from My Computer

Revise automatically if file with same name exists

Folder Upload Options

Upload files only

Upload folders and files

Cancel Upload



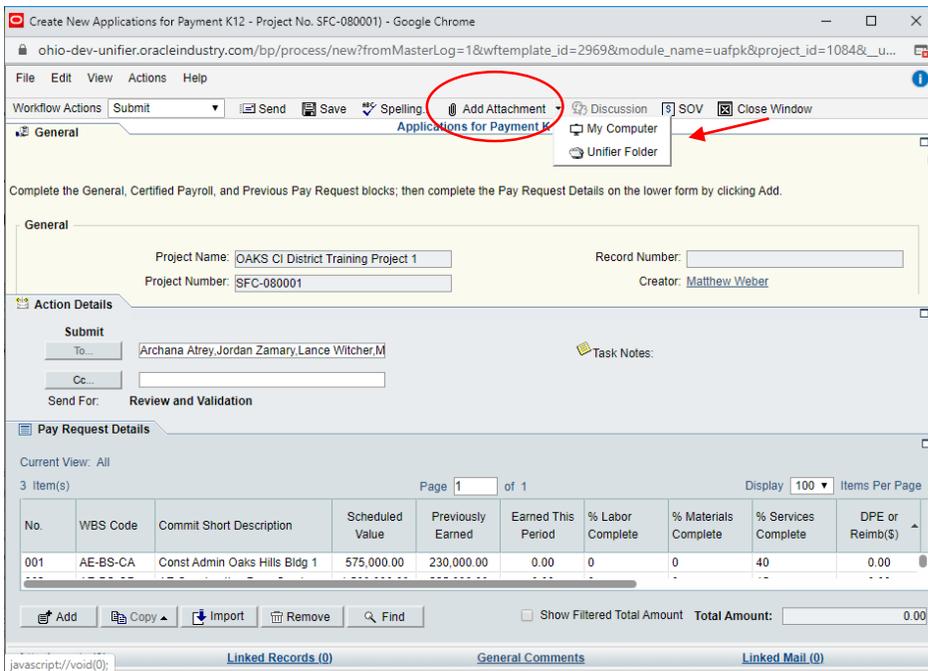
Attaching Documents to Records



Attach Documents to your Record

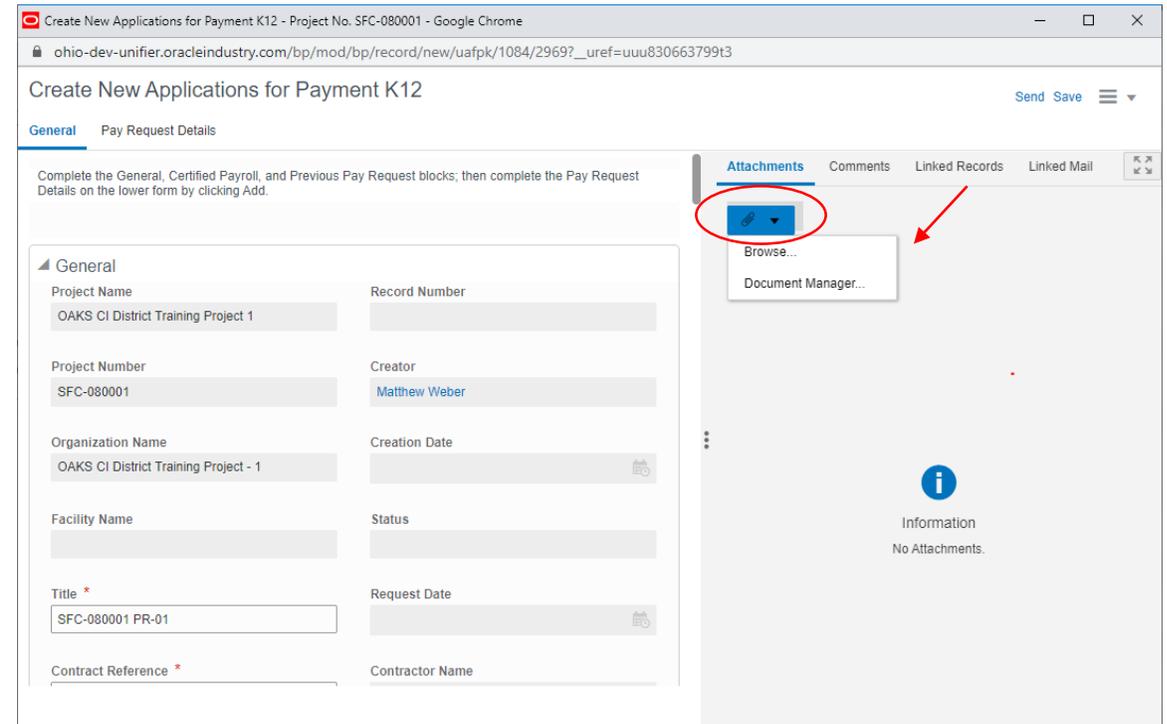
Current View:

- ▶ To attach documents to your record, click **Add Attachment** and choose either **My Computer** or **Unifier Folder**



New View:

- ▶ To attach documents to your record, click the attachment button  and select either **Browse** to select a file from your computer or **Document Manager**

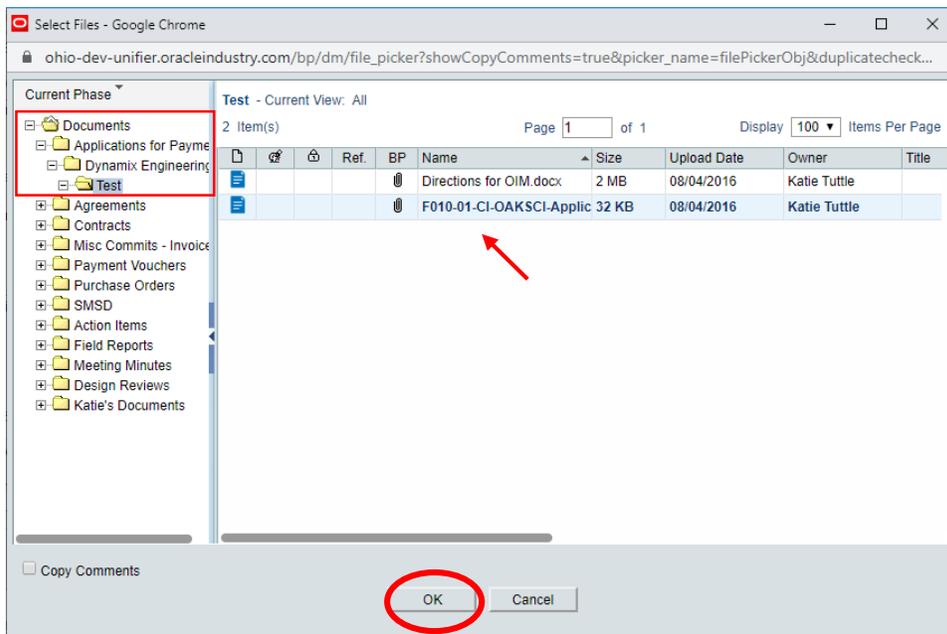


Attach Documents to your Record

- ▶ If you choose to attach a file from your computer, follow the directions starting from the [File Upload](#) section
- ▶ If you choose to attach a file from the Unifier Folder / Document Manager, follow these steps:

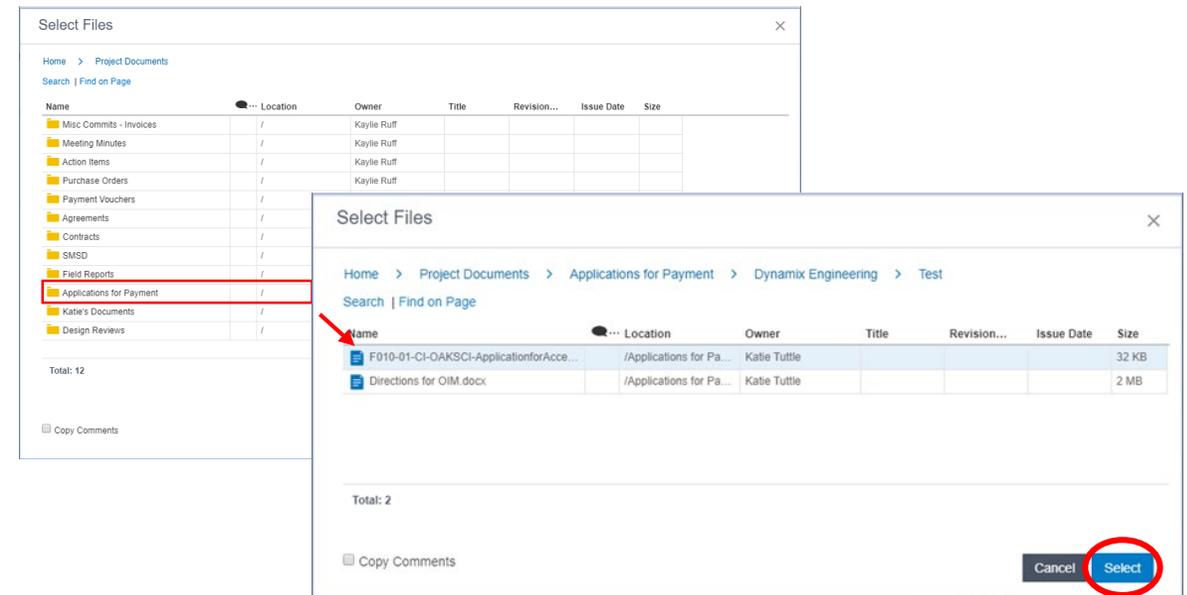
Current View:

- ▶ Choose the folder where your documents are saved
- ▶ Select your document on the right
- ▶ Click OK



New View:

- ▶ Choose the folder (double click) where your documents are saved
- ▶ Select your document
- ▶ Click Select



View Attachments

Current View:

- ▶ You can view the attachments at the bottom of your record

The screenshot shows a web application interface for a record. The top section is titled 'General' and contains fields for Organization (Department of Administrative Service), Record Number (CO-0013), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Creator (Kate Tuttle), Creation Date (05/16/2016 11:53 AM (UTC-5)), and Status (Pending). Below this is the 'Action Details' section with a 'Send' button and a 'Line Item List' section. The 'Line Item List' shows a table with 2 items. At the bottom, there is a navigation bar with tabs for 'Attachments (1)', 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'. A red arrow points to the 'Attachments (1)' tab.

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontr
002	0	CE-FC-03L	Concrete Labr	Concrete Labor	\$2,500.00	Bobs
001	2	CE-FC-03L	Concrete Labr	labor-concrete	\$2,500.00	Bobs

New View:

- ▶ Added attachments will now display in the right pane under the Attachments tab

The screenshot shows a web application interface for a record. The top section is titled 'General' and contains fields for Organization (OAKS CI Test), Record Number, Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Creator (Matthew Weber), Creation Date, Status, Title (Matt's Consulting OCI-00081_PR1), Internal Ref. Number, Contract Reference (Test UI - mmw 3), Professional Services Provider (OCI Test General), Agreement Type (Design), and EDGE Certified? (No). Below this is the 'Attachments' tab, which shows a list of 2 published attachments. A red arrow points to the 'Attachments' tab.

Name
C110-01-2019-MAR-AE_Agreement_Form_W7.xml
L110-08-CI-2019-JUL-AE-Notice_to_Commence_S...



Working in Logs



Logs

- ▶ **Logs** houses All Records for your project
- ▶ Click **Logs** in the dark gray menu to the left to show the different record types
- ▶ Select the record type you wish to view (ex: Contractor Pay Request)

The screenshot displays the Oracle Primavera Unifier interface. On the left, a dark gray navigation menu is visible, with 'Logs' and 'Contractor Pay Request' highlighted by red boxes and red arrows. The main area shows a 'Contractor Pay Request' record view with a table of records. The table has columns for Title, Contract S..., Contractor Name, and Percent. The right side of the interface shows a detailed view of the selected record, including fields for Organization, Record Number, Project Name, Creator, Project Number, Creation Date, Project Location, Status, Title, Request Date, Contract Reference, Contractor Name, Final Payment?, and EDGE Certified Prime?.

Title	Contract S...	Contractor Name	Percent
testshauna	Katie's Contr...	OCI Test General	
OCI-100056-01-01 PR2	Katie's Contra...	OCI Test General	
Shauna Test	Contract sov t...	OCI Test General	
Sample	General Trade...	OCI Test General	
CPR-0007	Katie's Contra...	OCI Test General	
KC PR2	Katie's Contra...	OCI Test General	
KC PR1	Katie's Contra...	OCI Test General	
KC - PR1	Katie's Contra...	OCI Test General	
shauna test	Shauna test sov	Zenith Systems, LLC	
PR1	Testing	OCI Test General	
TEST	Katie's Contra...	OCI Test General	
Pay Request #3	General Trade...	OCI Test General	
Test Pay Request #2	Testing	OCI Test General	
Test Pay Request	General Trade...	OCI Test General	
test energy	Contract sov t...	OCI Test General	
Katie's Contracting PR1	Katie's Contra...	OCI Test General	
test	Testing	OCI Test General	



Logs – View Record Details

To view a specific record:

1. Click Logs to expand
2. Click the Record type that you wish to view
3. Click the specific Record you wish to view
4. The details of selected Record will populate to the right

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a 'Logs' menu item, which is highlighted with a red box and a blue callout '1'. Below it, the 'Contractor Pay Request' record type is highlighted with a red box and a blue callout '2'. The central table displays a list of records, with one record highlighted in blue and a red box around it, and a blue callout '3' pointing to it. The right-hand details panel shows the record details for the selected record, with a blue callout '4' pointing to it.

Title	Contract S...	Contractor Name	Per
testshauna	Katie's Contra...	OCI Test General	
OCI-100056-01-01 PR2	Katie's Contra...	OCI Test General	
Shauna Test	Contract sov L...	OCI Test General	
Sample	General Trade...	OCI Test General	
CPR-0007	Katie's Contra...	OCI Test General	
KC PR2	Katie's Contra...	OCI Test General	
KC PR1	Katie's Contra...	OCI Test General	
KC - PR1	Katie's Contra...	OCI Test General	
shauna test	Shauna test sov	Zenith Systems, LLC	
PR1	Testing	OCI Test General	
TEST	Katie's Contra...	OCI Test General	
Pay Request #3	General Trade...	OCI Test General	
Test Pay Request #2	Testing	OCI Test General	
Test Pay Request	General Trade...	OCI Test General	
test energy	Contract sov L...	OCI Test General	
Katie's Contracting PR1	Katie's Contra...	OCI Test General	
test	Testing	OCI Test General	

Total: 29

Record Details:

- Organization: OAKS CI Test
- Record Number: CPR-0028
- Project Name: Agency General Projects
- Creator: Matthew Weber
- Project Number: OCI-080001
- Creation Date: 02/26/2020 09:20 AM
- Project Location: OAKS CI Administration
- Status: Approved
- Title: OCI-100056-01-01 PR2
- Request Date: 02/26/2020 05:00 PM
- Contract Reference: Katie's Contracting
- Contractor Name: OCI Test General
- Final Payment?: No
- EDGE Certified Prime?: Yes



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 Primavera Unifier logo and user information for Matthew Weber. The left sidebar contains a navigation menu with categories like Alerts, Tasks, E-Signatures, Drafts, Mailbox, Information, Cost Manager, Data Manager, Document Manager, and Logs. The main content area is titled "Contractor Pay Request" and shows a list of records with columns for Title, Contract S..., Contractor Name, and Percent ... A red arrow points to the "Workflow Progress" tab in the top right corner of the record details view. The "Workflow Progress" section is highlighted with a red border and contains a table of workflow steps.

Title	Record Number	Current Step	BP Setup Used
OCI-100056-01-01...	CPR-0028	Payment Processing	Agency Small Project

Filter By: Visited Steps

Step Name	Assignee	Company	Status
Creation	Matthew Weber	State of Ohio	Completed
Associate Review	Matthew Weber	State of Ohio	Completed
Review and Valid...	Matthew Weber	State of Ohio	Completed
PM Supervisor Ap...	Matthew Weber	State of Ohio	Completed
Payment Processing	Archana Atrey	State of Ohio	Not Started
Payment Processing	Shauna Hooks	State of Ohio	Not Started
Payment Processing	Rita Nichols	State of Ohio	Not Started
Payment Processing	Steve Mayo	State of Ohio	Not Started
Payment Processing	Matthew Weber	State of Ohio	Not Started



Create a New Record In Logs



Create a New Record

1. Click **Logs**
2. Select the appropriate **Record** type
3. Click the **Create** button

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar menu is open, and the 'Logs' option is highlighted with a red box and a blue circle labeled '1'. Below 'Logs', the 'Contractor Pay Request' option is also highlighted with a red box and a blue circle labeled '2'. The main content area shows a table of 'Contractor Pay Request' records. The '+ Create' button is circled in red and labeled with a blue circle '3'. The table has columns for Title, Contract S..., Contractor Name, and Percent ...

Title	Contract S...	Contractor Name	Percent ...
testshauna	Katie's Contra...	OCI Test General	31.0
OCI-100056-01-01 PR2	Katie's Contra...	OCI Test General	25.0
Shauna Test	Contract sov t...	OCI Test General	47.0
Sample	General Trade...	OCI Test General	74.0
CPR-0007	Katie's Contra...	OCI Test General	13.0
KC PR2	Katie's Contra...	OCI Test General	11.0
KC PR1	Katie's Contra...	OCI Test General	6.0
KC - PR1	Katie's Contra...	OCI Test General	5.0
shauna test	Shauna test sov	Zenith Systems, LLC	0.0
PR1	Testing	OCI Test General	98.0
TEST	Katie's Contra...	OCI Test General	0.0
Pay Request #3	General Trade...	OCI Test General	33.0
Test Pay Request #2	Testing	OCI Test General	0.0
Test Pay Request	General Trade...	OCI Test General	17.0
test energy	Contract sov t...	OCI Test General	66.0
Katie's Contracting PR1	Katie's Contra...	OCI Test General	0.0
test	Testing	OCI Test General	78.0



Add Information to the Record

Current View:

- ▶ Fill out required information in the General Tab
- ▶ Scroll down to view the entire record
- ▶ Required information is marked with a red *

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

ohio-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=261665&module_name=ucpr&project_id=1...

File Edit View Actions Help

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

Contractor Pay Request

General

General

Organization: OAKS CI Test Record Number:

Project Name: Agency General Projects Test Creator: Matthew Weber

Project Number: OCI-080001 Creation Date:

Project Location: OAKS CI Administration Status:

Title: Matt's Consulting OCI-000081_PR1 * Request Date: 03/17/2020 05:00 PM (UTC-5)

Contract Reference: General Trades Phase 1 * Select... * Contractor Name: OCI Test General

Final Payment?: No * EDGE Certified Prime?: No

Retainage Release Requested?: No * Period From: 02/01/2020 05:00 PM (UTC-5) * Period To: 02/29/2020 05:00 PM (UTC-5)

Internal Ref. Number: A/E Approval Date:

Prevailing Wage

Action Details

Pay Request Details Added Purchase Orders

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

New View:

- ▶ Fill out all required information in the left pane
- ▶ Scroll down to view the entire record
- ▶ Required information is marked with a red *

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1003/261665?__uref=uuu91766817713#

Create New Contractor Pay Request

General Pay Request Details Added Purchase Orders

General

Title * Matt's Consulting OCI-00081_PR1 Request Date * 03/17/2020 05:00 PM (UTC-5)

Contract Reference * General Trades Phase 1 Contractor Name OCI Test General

Final Payment? * No EDGE Certified Prime? No

Retainage Release Requested? Select

Period From * 02/01/2020 05:00 PM (UTC-5) Period To * 02/29/2020 05:00 PM (UTC-5)

Internal Ref. Number A/E Approval Date

Prevailing Wage

Prevailing Wage Report

Type a Contractor Name...

Attachments Comments Linked Records Linked Mail

Published Attachments

Name	Title
ContractScheduleofValu...	
L110-08-CI-2019-JUL-A...	
test view bd	

Total: 3



Add Information to the Record

Current View:

- ▶ Add attachments by clicking **Add Attachment** near the top-center of the Record

The screenshot shows a web browser window titled "Create New Contractor Pay Request - Project No. OCI-080001". The browser address bar shows the URL: ohio-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=261665&module_name=ucpr&project_id=1.... The browser's menu bar includes File, Edit, View, Actions, and Help. Below the menu bar, there are workflow actions: Submit, Send, Save, Spelling, Add Attachment (highlighted with a red box and arrow), Discussion, SOV, and Close Window. The main content area is titled "Contractor Pay Request" and contains a "General" section with various input fields. A red arrow points to the "Add Attachment" button in the browser's menu bar.

Field	Value
Organization	OAKS CI Test
Project Name	Agency General Projects Test
Project Number	OCI-080001
Project Location	OAKS CI Administration
Title	Matt's Consulting OCI-000081_PR1 *
Contract Reference	General Trades Phase 1 Select...
Final Payment?	No *
Retainage Release Requested?	No
Period From	02/01/2020 05:00 PM (UTC-5) *
Internal Ref. Number	
Record Number	
Creator	Matthew Weber
Creation Date	
Status	
Request Date	03/17/2020 05:00 PM (UTC-5) *
Contractor Name	OCI Test General
EDGE Certified Prime?	No
Period To	02/29/2020 05:00 PM (UTC-5) *
A/E Approval Date	

New View:

- ▶ In the right pane, click **Attachments** to add any necessary documents to the record

The screenshot shows a web browser window titled "Create New Contractor Pay Request - Project No. OCI-080001". The browser address bar shows the URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1003/261665?_uref=uuu91766817713#. The browser's menu bar includes File, Edit, View, Actions, and Help. Below the menu bar, there are workflow actions: Submit, Send, Save, Spelling, Add Attachment (highlighted with a red box and arrow), Discussion, SOV, and Close Window. The main content area is titled "Create New Contractor Pay Request" and contains a "General" section with various input fields. A red arrow points to the "Attachments" tab in the right pane.

Field	Value
Title	Matt's Consulting OCI-00081_PR1
Request Date	03/17/2020 05:00 PM (UTC-5)
Contract Reference	General Trades Phase 1
Contractor Name	OCI Test General
Final Payment?	No
EDGE Certified Prime?	No
Retainage Release Requested?	Select
Period From	02/01/2020 05:00 PM (UTC-5)
Period To	02/29/2020 05:00 PM (UTC-5)
Internal Ref. Number	
A/E Approval Date	

Name	Title
ContractScheduleofValu...	
L110-08-CI-2019-JUL-A...	
test view.txt	

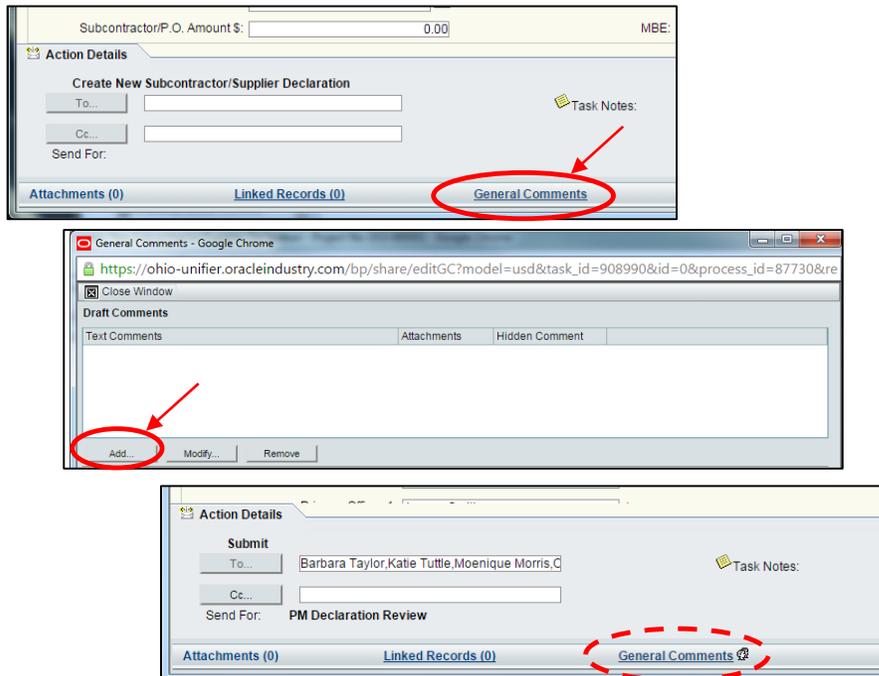


Add General Comments

- ▶ General Comments are a good way to communicate with team members about a specific record

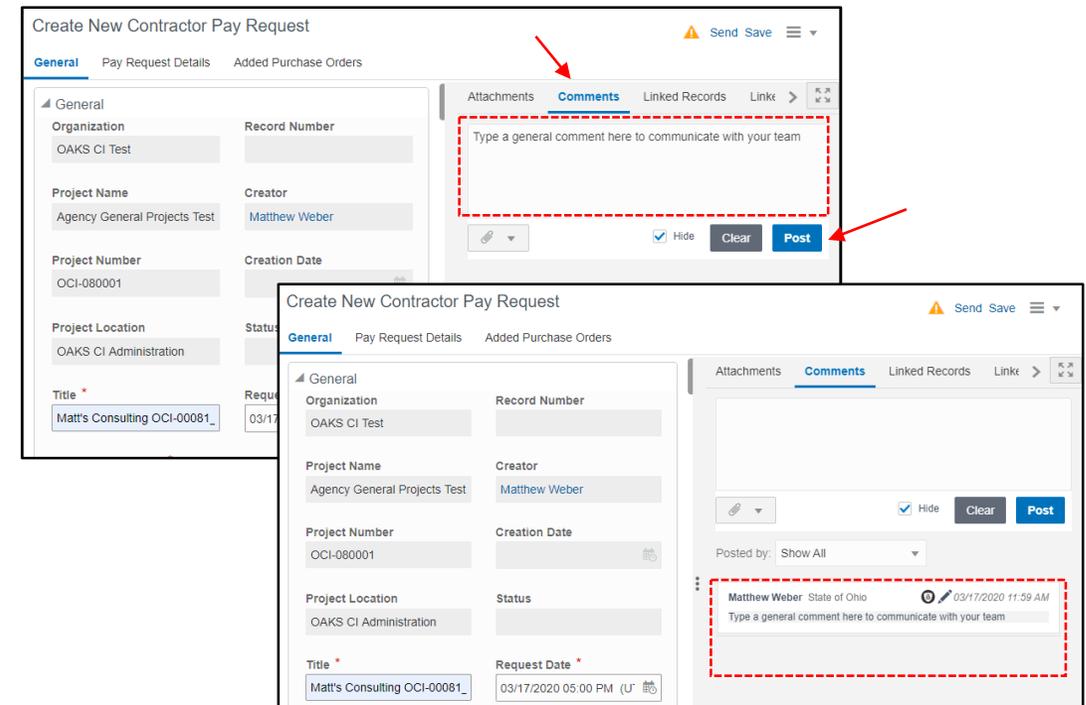
Old View:

- ▶ Click the General Comments at the bottom of the record
- ▶ Click Add
- ▶ Enter Comments and Click OK



New View:

- ▶ Click the Comments tab located in the right pane of the record
- ▶ Type your comment in the text box
- ▶ Click Post (the comment will display below once posted)



Send the Record

Old View:

- ▶ Choose or verify the correct Workflow Action is selected
- ▶ The Action Details section of the record will display the recipients of the next task
- ▶ Click **Send**

The screenshot shows a web browser window titled "Create New Action Items - Project No. OCI-090004 - Google Chrome". The address bar shows the URL: <https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMaster>. The browser menu is open, and the "Workflow Actions" dropdown is set to "Send". A red box highlights the "Send" button in the browser menu. Below the browser window, the "Action Items" form is visible. The "General" section contains fields for Organization (Department of Administrative Services), Project Number (OCI-090004), Project Name (OAKS CI Training 4), and Project Location (4200 Surface Road). The "Action Details" section is highlighted with a red box and contains a "Send" button, a "To..." field with the text "Bill Schwertfager,Oaks Instructor,Rita Nichols,", a "Cc..." field, and a "Send For:" field set to "Response".

New View:

- ▶ Click the **Send** link (top right corner of the record)
- ▶ Choose or verify the correct Workflow Action is selected
- ▶ The recipients of the task are displayed below
- ▶ Click the **Send** button

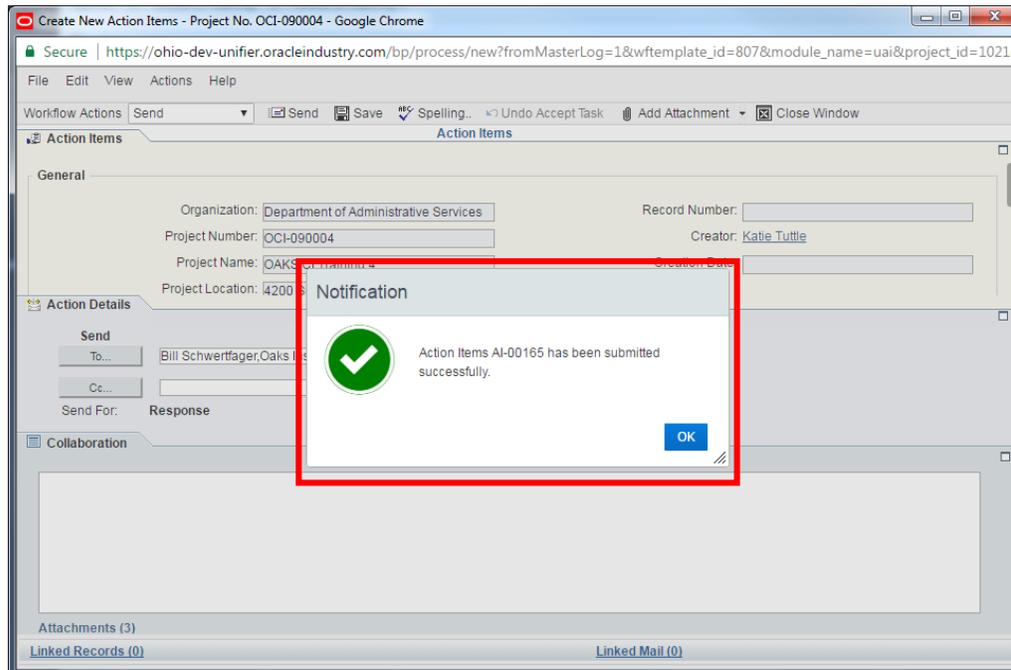
The screenshot shows a web browser window titled "Subcontractor/Supplier Declaration - Matt's Concrete - Project No. OCI-080001 - Google Chrome". The address bar shows the URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2545750/undefined/undefined?__uref=uuu6757243t1. The browser menu is open, and the "Send" link is circled in red. Below the browser window, the "Subcontractor/Supplier Declaration" form is visible. The "General" section contains fields for Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General), Project Location (OAKS CI Administration), and Title (Matt's Concrete). The "Workflow Action Details" section is highlighted with a red box and contains a "Workflow Actions" dropdown set to "Recommend Approval", a "Send For" field set to "Declaration Review", and a "To" field with the text "Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Coordinator". The "Due Date Details" section contains a "Task Due Date" field. At the bottom right, there is a "Send" button circled in red and a "Cancel" button.



Successful Submission

Old View:

- ▶ You should receive a notification that your record has been submitted successfully



New View:

- ▶ The record will close automatically once it has been submitted successfully

If you receive an error while sending and need assistance, please contact the OAKS CI Support Desk (oaksci@ofcc.ohio.gov)



Questions?

OAKS CI Support Desk Contact Info:

oaksci@ofcc.ohio.gov

614.644.2211

