

The logo for OAKS Capital Improvements features two overlapping circular bands. The upper band is light blue and the lower band is a vibrant lime green. The text "OAKS" is written in a large, bold, dark blue sans-serif font, and "Capital Improvements" is written in a smaller, dark blue sans-serif font below it.

**OAKS**  
Capital Improvements

# Energy Contractor Training

# Today's Agenda

- Introduction to OAKS CI
  - System Navigation:
    - Tasks, Notifications, Drafts, Document Manager, Logs
  - Creating Records in Logs
  - Working with Tasks
  - Document Manager and Attachments
- Subcontractor/Material Supplier Declaration
- Contract Schedule of Values (SOV)
- Change Orders

# Training Purpose

- To give all users a basic understanding of navigating the OAKS CI system and a general overview of the necessary records pertaining to their project
- **We're Here for you!**
  - Additional training is always available, just contact us!
  - Support Desk assistance is just a call or email away!
    - [oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)
    - 614-644-2211

# Topics

## Slide

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



# OAKS CI Process

## Step 1

- Contract created in OAKS CI by Project Coordinator (PC) and Sent for approval via DocuSign. Once all parties sign, contract will be approved in OAKS CI by PC

## Step 2

- Subcontractor Supplier Declarations created by Contractor then approved by Project Manager (PM) and validated by PC

## Step 3

- Contract Schedule of Values is created by Contractor and must identify any EDGE providers

## Step 4

- Contractor can now create Pay Requests that will bill against the schedule of values record



# Introduction to OAKS CI

## October, 2020

# 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**<sup>®</sup>

# 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**

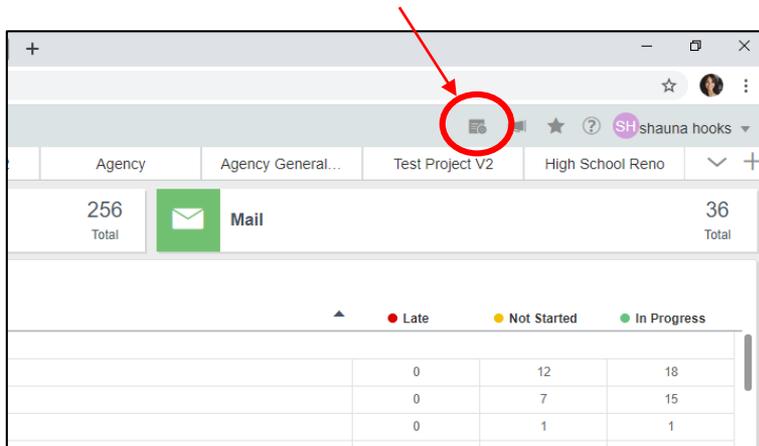


# Important Notice – View Changes

OAKS CI has recently been upgraded to version 19.12, making the new view permanent

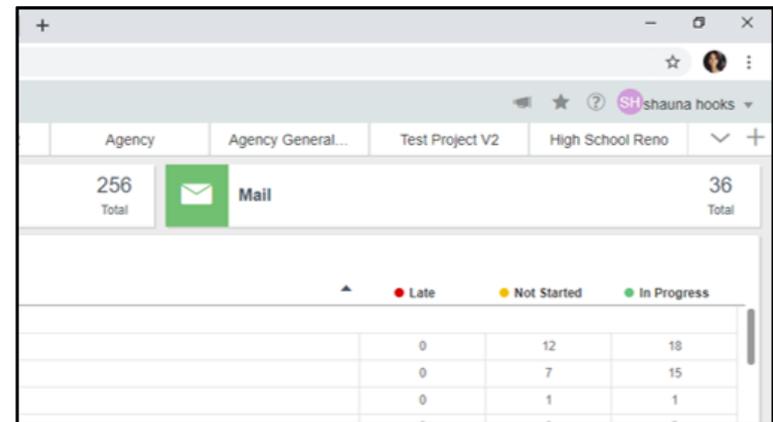
Previously, you could switch between views with the button near the top right of your OAKS CI screen. When clicked, your view would toggle between the **Old View** and **New UI View**.

When OAKS CI was upgraded to version 19.12, the was removed, and you can no longer switch between the two views. All new records created will automatically be in the **New UI View**.



A screenshot of the OAKS CI interface. The top navigation bar includes a search icon, a star, a question mark, and the user name 'SH shauna hooks'. Below this, there are tabs for 'Agency', 'Agency General...', 'Test Project V2', and 'High School Reno'. A green envelope icon labeled 'Mail' is visible, with '256 Total' on the left and '36 Total' on the right. A red circle highlights a small icon in the top right corner, with a red arrow pointing to it from above. Below the mail icon, there is a legend for 'Late' (red dot), 'Not Started' (yellow dot), and 'In Progress' (green dot). A table below shows data for these categories.

	Late	Not Started	In Progress
	0	12	18
	0	7	15
	0	1	1



A screenshot of the OAKS CI interface, identical to the previous one, but with the toggle button removed from the top right corner. The rest of the interface, including the navigation bar, tabs, mail icon, legend, and table, remains the same.

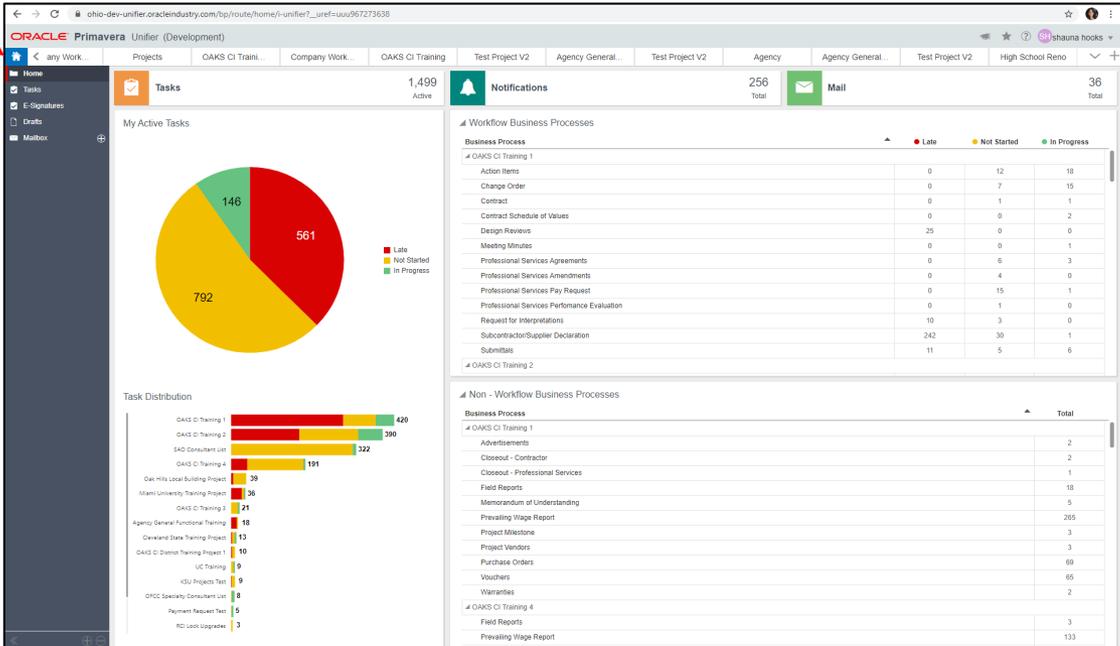
	Late	Not Started	In Progress
	0	12	18
	0	7	15
	0	1	1

# New User Interface (UI) View

- ▶ Some steps and screen images will be different in the new view
- ▶ When different, the following slides will show screenshots and steps for the for both the old view and New UI View to highlight changes
- ▶ OAKS CI job aids have been updated to reflect the new view. Please visit our webpage at [www.ofcc.ohio.gov/oaks-ci](http://www.ofcc.ohio.gov/oaks-ci) for user and process specific instructions

# 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



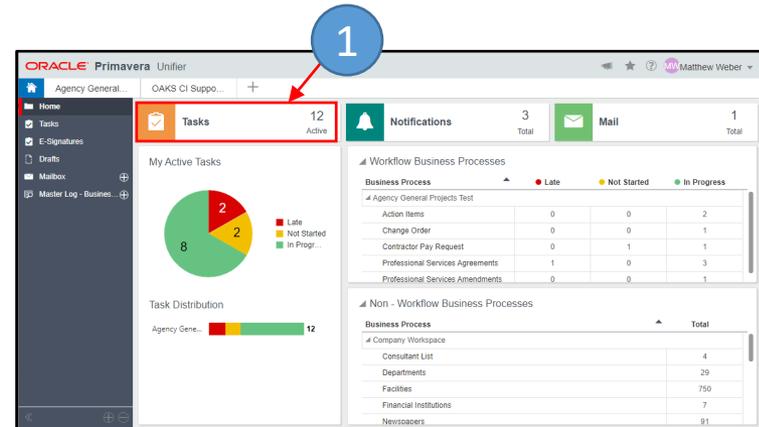
The screenshot shows the Oracle Primavera Unifier Home Page. A red arrow points to the Home button in the left-hand navigation menu. The main content area displays 'My Active Tasks' with a pie chart showing 1,499 total tasks, categorized into 792 Not Started (yellow), 561 Late (red), and 146 In Progress (green). Below the pie chart is a 'Task Distribution' horizontal bar chart showing task counts for various projects. On the right, there are sections for 'Workflow Business Processes' and 'Non-Workflow Business Processes', each with a table of tasks and their counts.

Business Process	Late	Not Started	In Progress
OAQS 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
OAQS CI Training 2			

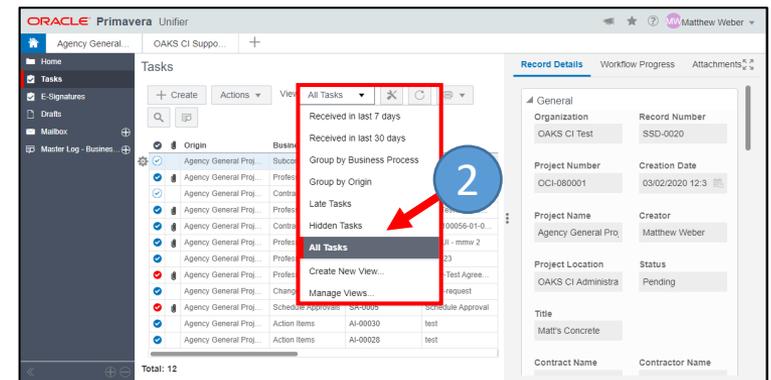
Business Process	Total
OAQS CI Training 1	
Advertisements	2
Closeout - Contractor	2
Closeout - Professional Services	1
Field Reports	18
Memorandum of Understanding	5
Prevailing Wage Report	265
Project Milestone	3
Project Vendors	3
Purchase Orders	69
Workbooks	65
Warranties	2
OAQS CI Training 4	
Field 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

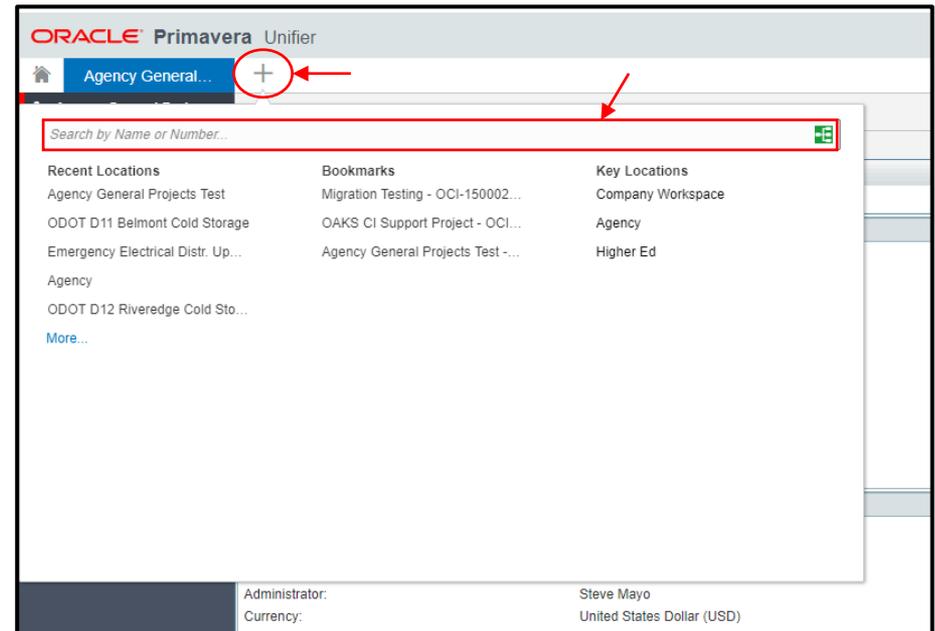


2. **Note:** Your default view shows “Received in the last 7 days”. Change this view to **“All Tasks”** and that will remain your default for all projects.



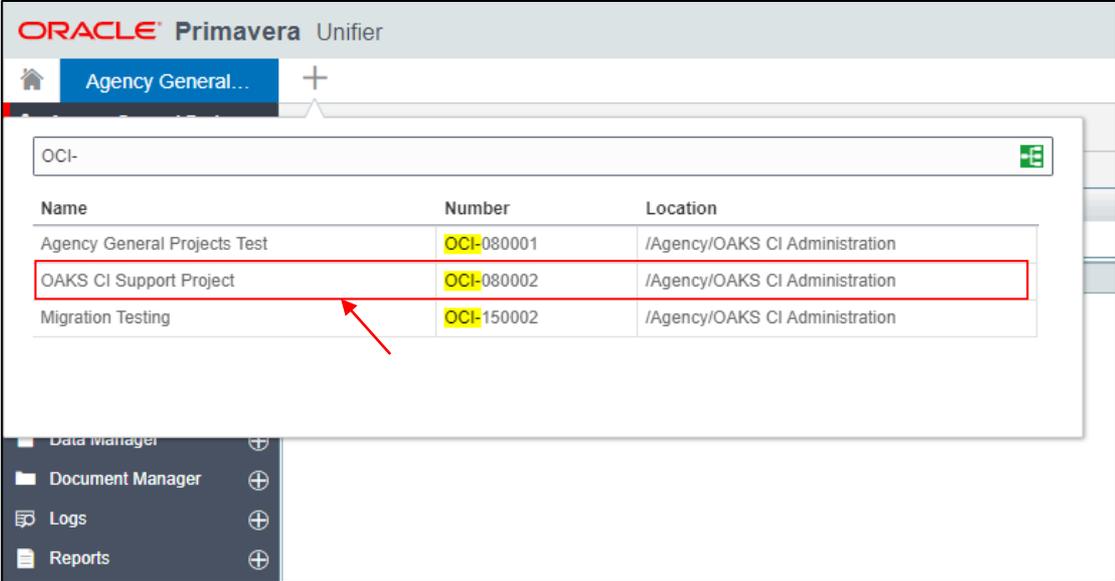
# Find your Project

- ▶ 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



# 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

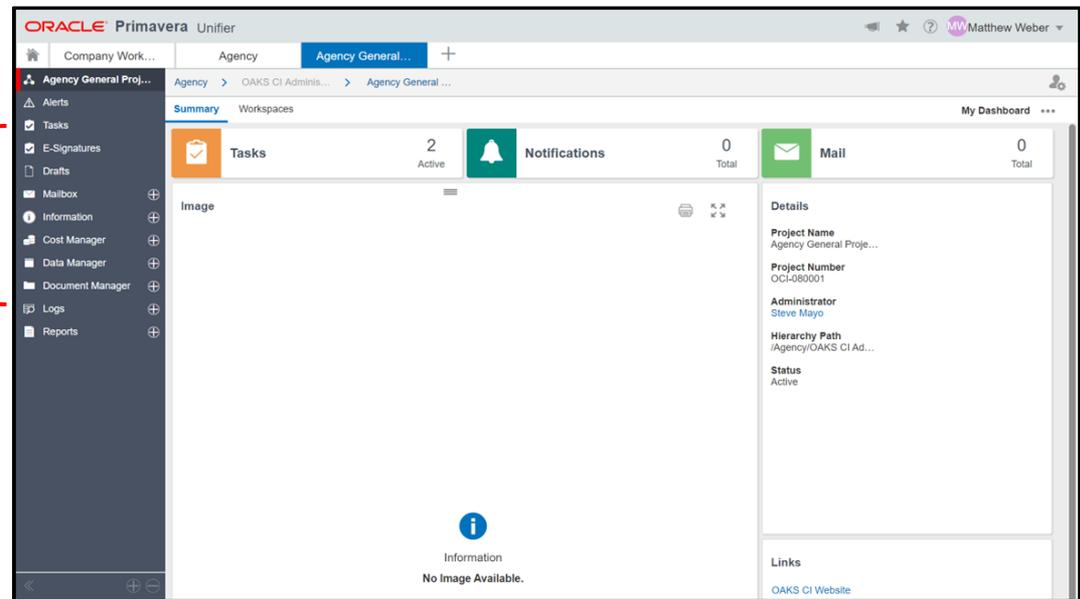


The screenshot displays the Oracle Primavera Unifier interface. At the top, the text "ORACLE Primavera Unifier" is visible. Below this, there is a navigation bar with a home icon and a tab labeled "Agency General...". A search input field contains the text "OCI-". Below the search field, a table lists search results with columns for Name, Number, and Location. The row for "OAKS CI Support Project" is highlighted with a red border, and a red arrow points to it. The bottom left corner shows a sidebar with icons for Data Manager, Document Manager, Logs, and Reports.

Name	Number	Location
Agency General Projects Test	OCI-080001	/Agency/OAKS CI Administration
OAKS CI Support Project	OCI-080002	/Agency/OAKS CI Administration
Migration Testing	OCI-150002	/Agency/OAKS CI Administration

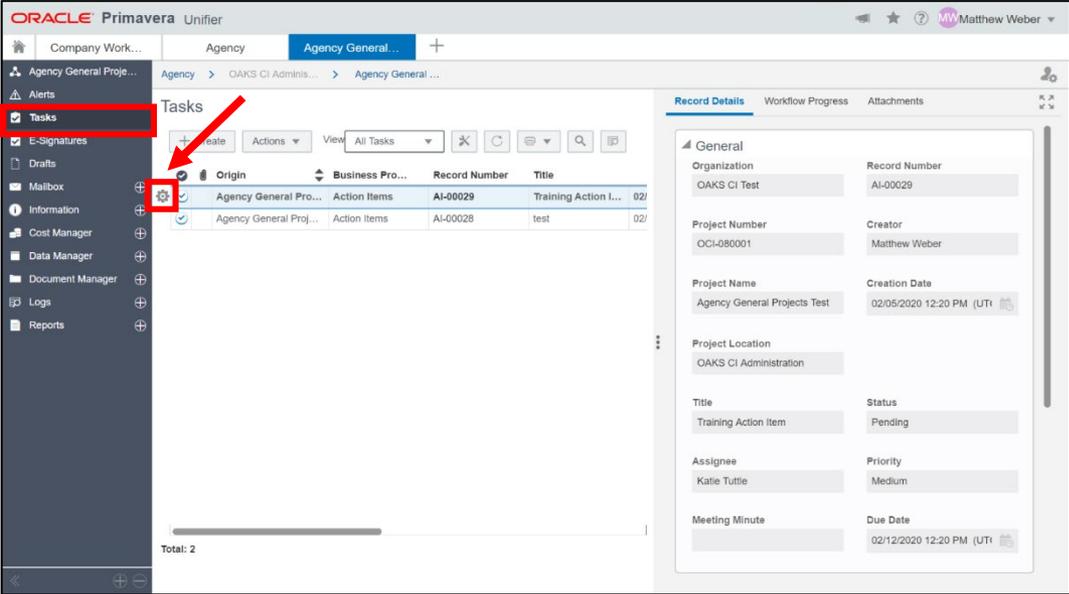
# Project Home Page

- ▶ 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



ORACLE Primavera Unifier

Company Work... Agency Agency General... +

Agency General Pro... Agency > OAKS CI Admins... > Agency General ...

Alerts

**Tasks**

E-Signatures

Drafts

Mailbox

Information

Cost Manager

Data Manager

Document Manager

Logs

Reports

Create Actions View All Tasks

Origin	Business Pro...	Record Number	Title
Agency General Pro...	Action Items	AI-00029	Training Action I... 02/
Agency General Proj...	Action Items	AI-00028	test

Total: 2

Record Details Workflow Progress Attachments

General

Organization: OAKS CI Test Record Number: AI-00029

Project Number: OCI-080001 Creator: Matthew Weber

Project Name: Agency General Projects Test Creation Date: 02/05/2020 12:20 PM (UT) 02/

Project Location: OAKS CI Administration

Title: Training Action Item Status: Pending

Assignee: Katie Tuttle Priority: Medium

Meeting Minute: Due Date: 02/12/2020 12:20 PM (UT) 02/

# Drafts

- ▶ Drafts are any unfinished records that you have created and saved for later
- ▶ Click any record to preview the details in the right pane
- ▶ You can delete any drafts you no longer need

The screenshot shows the Primavera Unifier interface. The left sidebar has a red box around the 'Drafts' menu item. The main area displays a table of drafts. A red arrow points to the record with Record Number 'CPR-0017'. The right pane shows the 'Record Details' for this record, with a red dashed border around it.

Business Process	Record Number	Title	Last Saved	Discussion
Contractor Pay R...		Test - mmw	02/18/2020 11:38 ...	
Contractor Pay R...			02/24/2020 07:03 ...	
Contractor Pay R...	CPR-0017	OCI-100056-01-0...	02/26/2020 06:18 ...	
Contract Schedul...		mmw-SOV Test	02/03/2020 02:20 ...	
Contract Schedul...		Test SOV - mmw	02/21/2020 07:33 ...	
Contract Schedul...			02/25/2020 06:54 ...	
Contract Schedul...			02/26/2020 11:14 ...	
Contract	CON-00021	Matt's Contract	02/24/2020 10:18 ...	
Contract	CON-00022	Contract MMW 001	02/26/2020 08:56 ...	
Action Items	uai-		02/04/2020 07:51 ...	
Action Items	uai-	Action Item 123	07/07/2020 10:16 ...	

Total: 11

**Record Details**

**General**

Organization	Department of Administrative &...
Record Number	CPR-0017
Project Name	OAKS CI Training 1
Creator	Matthew Weber
Project Number	OCI-080001
Creation Date	02/26/2020 06:16 AM (L)
Project Location	Surface Road
Status	Pending
Title	OCI-100056-01-01 PR2
Request Date	02/26/2020 02:00 PM (L)
Contract Reference	Hooks Test1
Contractor Name	Sands Decker Ltd.
Final Payment?	No
EDGE Certified Prime?	
Retainage Release Requested?	No
Period From	02/01/2020 02:00 PM (L)
Period To	02/29/2020 02:00 PM (L)

# Drafts and Timeout

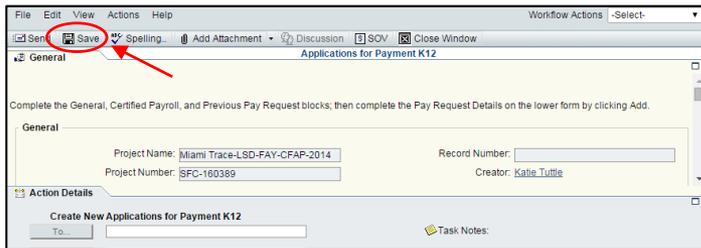
OAKS CI times out after 60 Minutes of Inactivity

- ▶ 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.

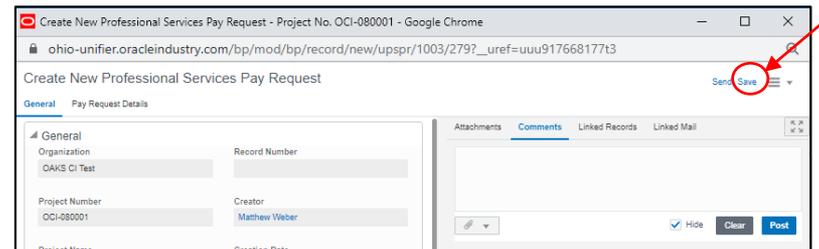
## Old View:

**Save** was found at the top left of the record



## New View:

**Save** is found at the top right of the record



# 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, Deleted Items, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. The 'Notifications' item is highlighted with a red box and a red arrow points to it. The main content area displays a 'Notifications' table with the following data:

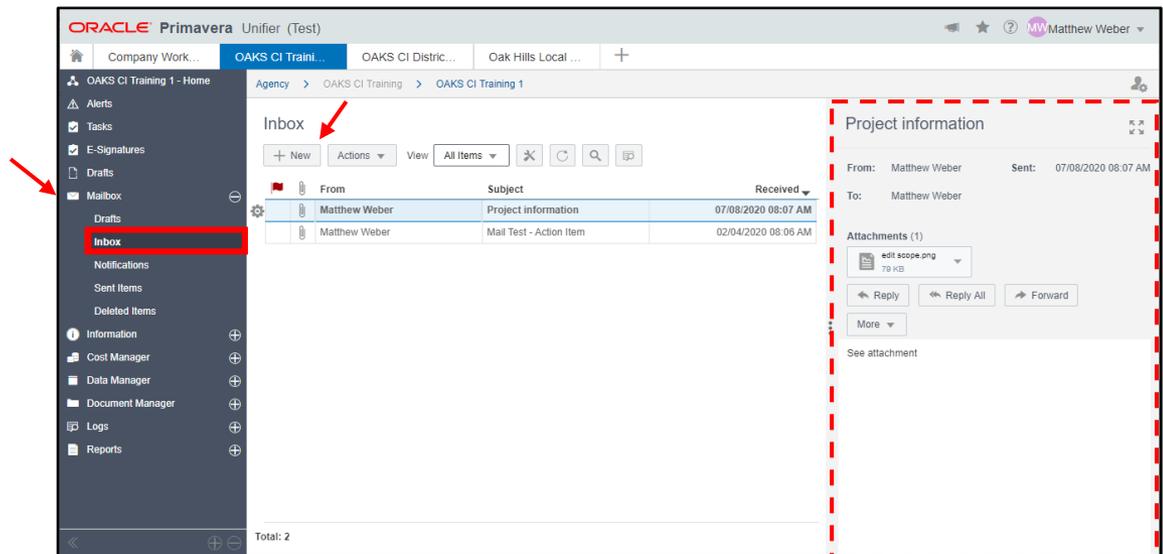
Business Pro...	From	Title	Record Number	Origin
Contract Schedul...	Shauna Hooks, soo	Test SOV	CSOV-0008	Agency Gener...
Subcontractor/Su...	Matthew Weber, s...	Matt's Consulting	SSD-0015	Agency Gener...
Action Items	Matthew Weber, s...	Training Action Item	AI-00029	Agency Gener...

Below the table, it says 'Total: 3'. To the right of the table is a 'Record Details' panel for the selected record, showing fields like Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General P), Project Location (OAKS CI Adminis...), Title (Test SOV), Contract No., and Contractor Name (OCI Test General).

# Mailbox – Inbox

Within your Mailbox you will also find your Inbox

- ▶ You can create and send a new message from your Inbox
- ▶ You can view the full message by double clicking the record, or view the selected message in the right pane



# Document Manager Uploading



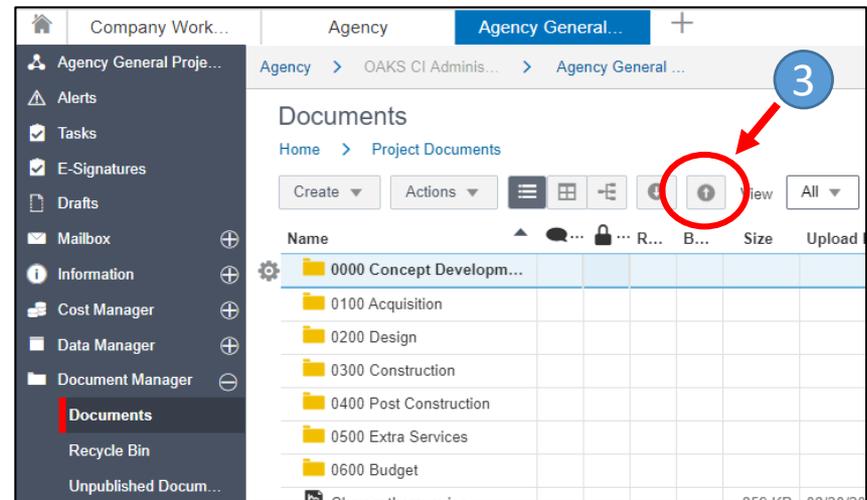
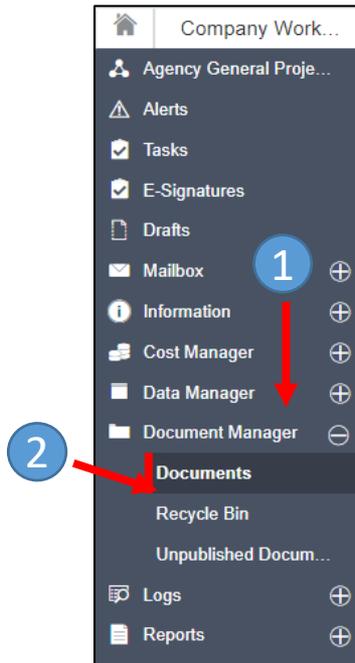
# About Document Manager

*\* 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

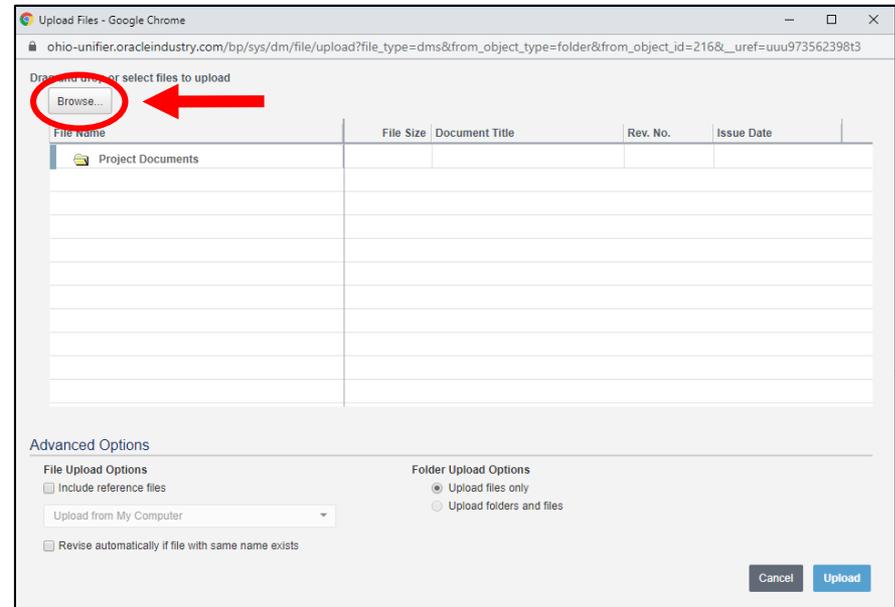
# Document Upload

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



# File Upload Window

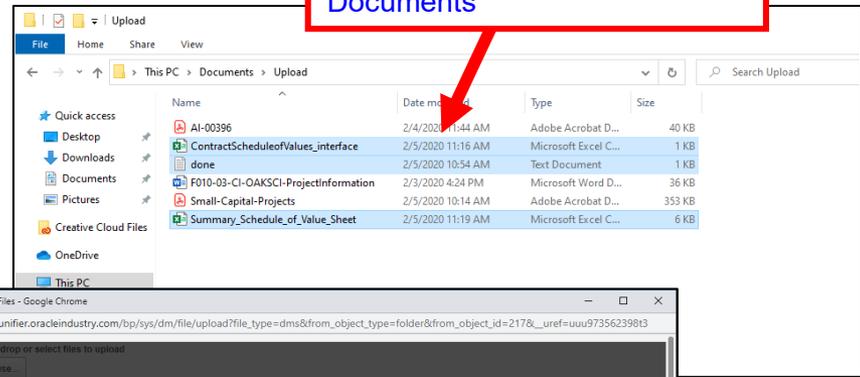
- ▶ A new window will appear for you to add files
- ▶ Click **Browse** to choose files for upload



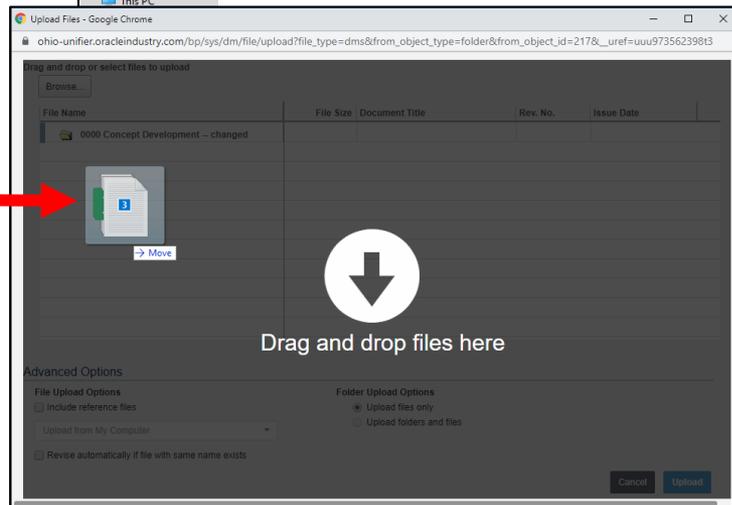
# Drag and Drop files

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

Choose your folder of Documents or Select Multiple Documents

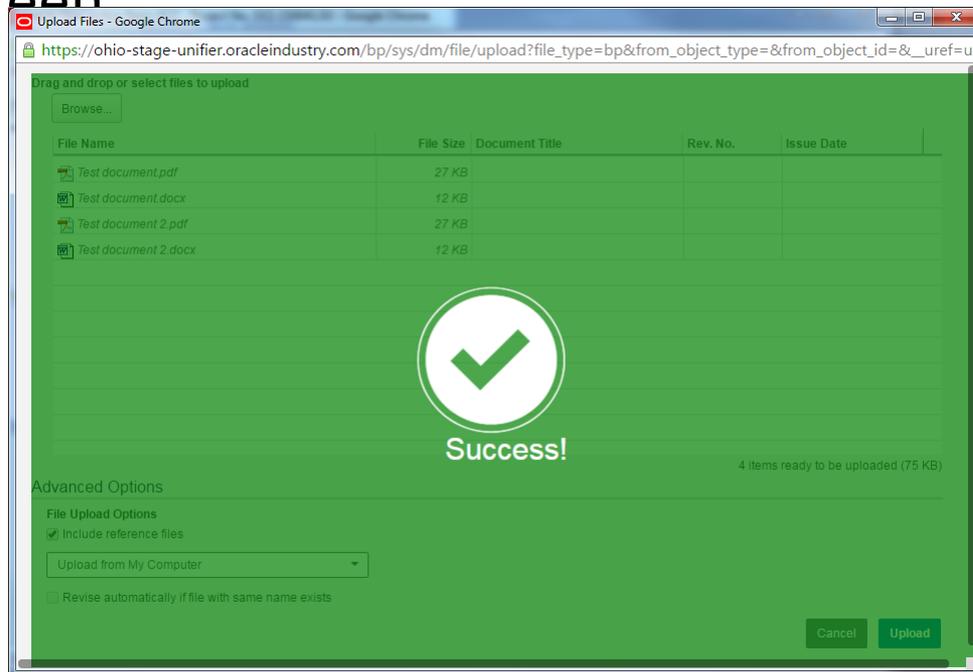


Drag and Drop the documents into the Upload Files window



# Adding Documents

- ▶ If all 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

# View Documents

- ▶ The window will close, and you will receive a message that your files have been uploaded
- ▶ Click the **Refresh** button to see the new files

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'Company Work...', 'Agency', and 'Agency General...'. The left sidebar contains various navigation options, with 'Documents' highlighted. The main content area displays a 'Documents' view with a table of files and folders. A red box highlights the 'View' and 'Refresh' buttons in the toolbar. A message box is overlaid on the table, stating: 'Files or folders have been successfully uploaded to the currently open Document Manager. To see the changes, click Refresh'.

Name	Size	Date	Owner	Issue Date
0000 Concept Developme...			Steve Mayo	
0100 Acquisition			Steve Mayo	
0200 Design			Steve Mayo	
0300 Construction			Steve Mayo	
0400 Post Construction			Steve Mayo	
0500 Extra Services			Steve Mayo	
0600 Budget			Steve Mayo	
Chrysanthemum.jpg	859 KB	08/30/2016 12...	Katie Tuttle	
Clear Browsing Data.docx	886 KB	09/01/2016 12...	Katie Tuttle	
Construction Phase DB Tr...	26 MB	02/09/2017 06...	Katie Tuttle	
Desert.jpg	827 KB	08/30/2016 12...	Katie Tuttle	
Penguins.jpg	760 KB	09/02/2016 11...	Katie Tuttle	

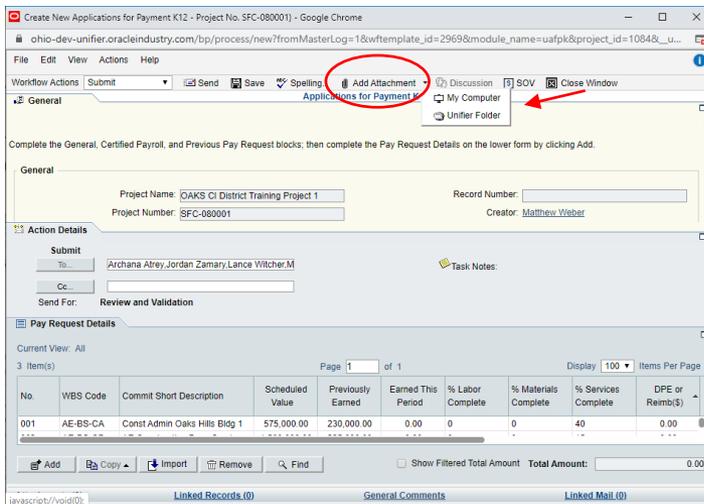
# Attaching Documents to Records



# Attach Documents to your Record

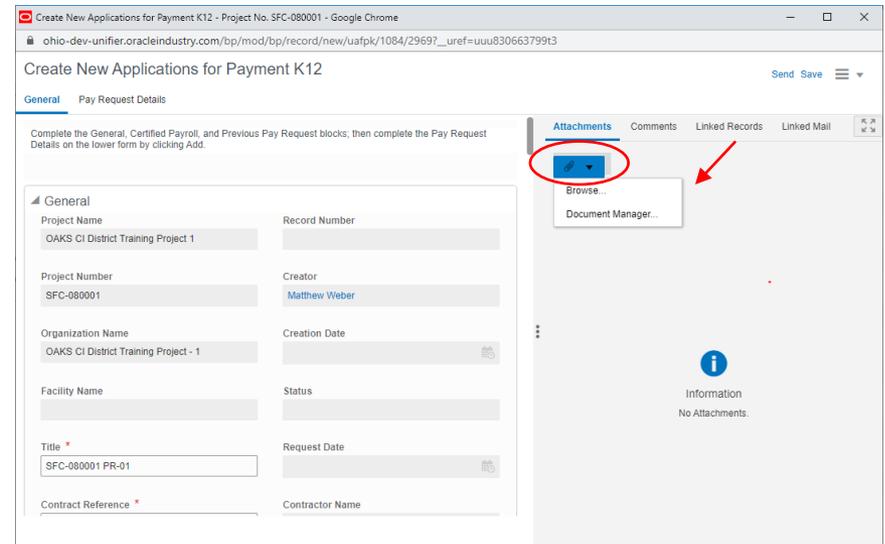
## Old View:

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



## New View:

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

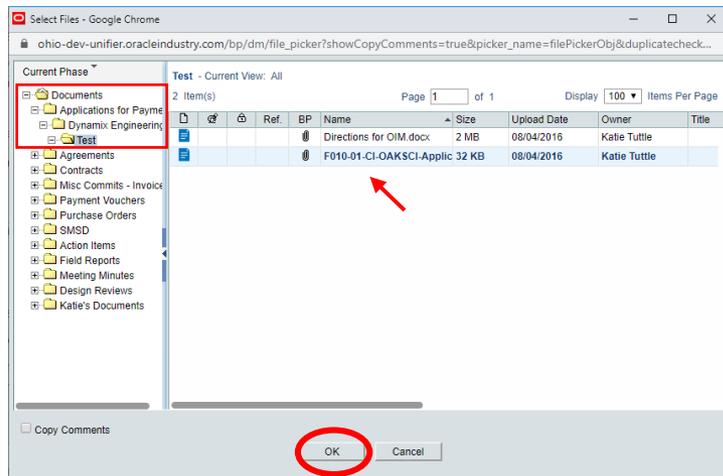


# Attach Documents to your Record

- ▶ 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:

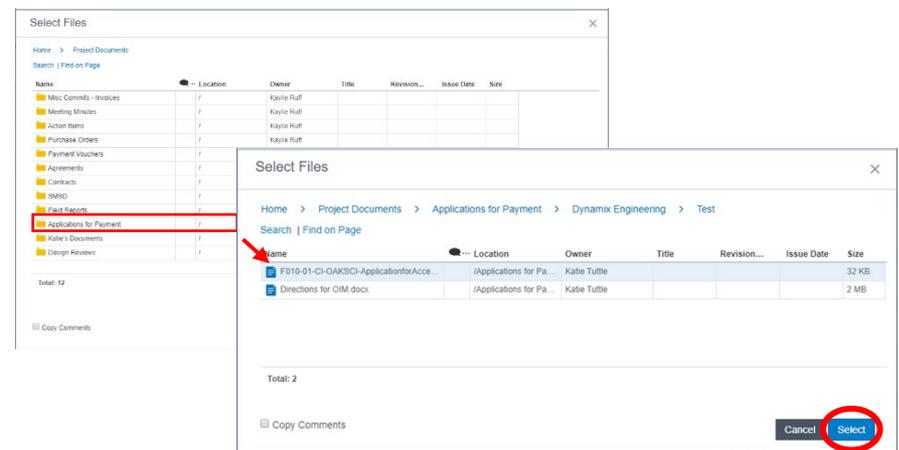
## Old View:

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



## New View:

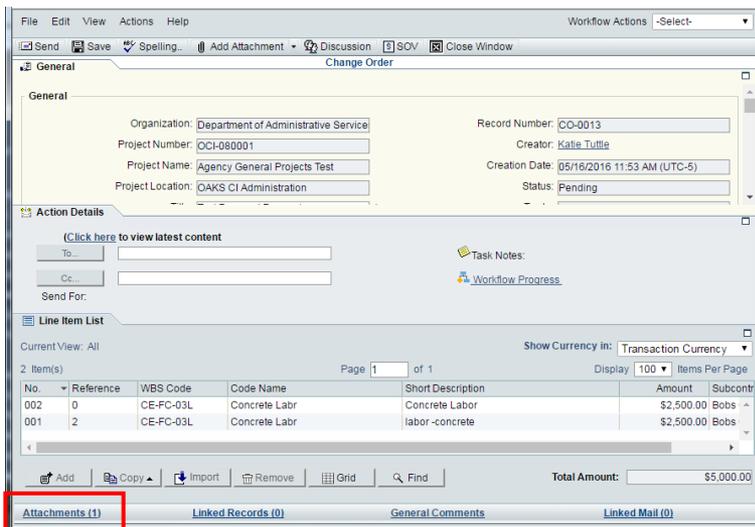
- ▶ Choose the folder (double click) where your documents are saved
- ▶ Select your document
- ▶ Click Select



# View Attachments

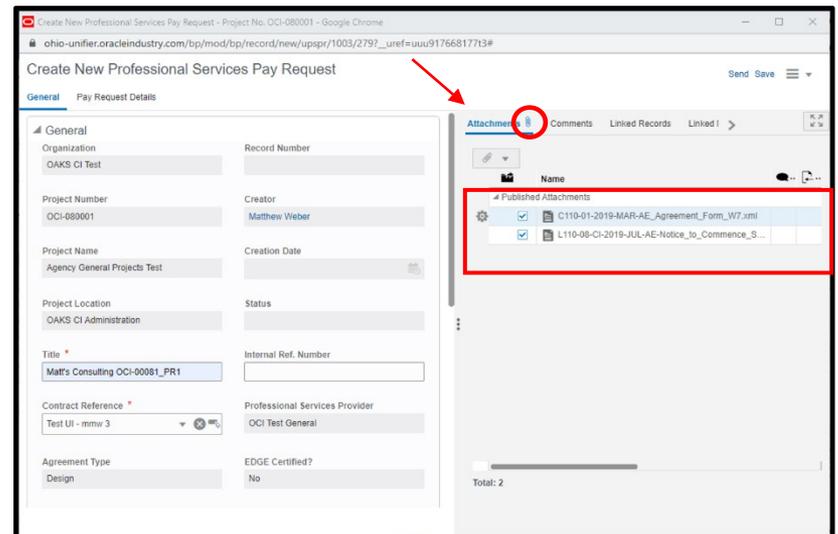
## Old View:

- ▶ User could view the attachments at the bottom of the record
- ▶ The number of attachments in the record would display in the same location



## New View:

- ▶ Added attachments will now display in the right pane under the Attachments tab
- ▶ A paperclip icon will now appear next to the tab if the record has an attachment



# 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' 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 'General' information panel with various fields and values.

Title	Contract S...	Contractor Name	Percent
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 Contracting	OCI Test General	
test	Testing	OCI Test General	

General Information Panel:

- Organization: OAKS CI Test
- Record Number: CPR-0029
- Project Name: Agency General Project
- Creator: Shauna Hooks
- Project Number: OCI-080001
- Creation Date: 02/27/2020 03:58 P
- Project Location: OAKS CI Administration
- Status: Approved
- Title: testshauna
- Request Date: 02/27/2020 05:00 P
- Contract Reference: Katie's Contracting
- Contractor Name: OCI Test General
- Final Payment?: No
- EDGE Certified Prime?: Yes

# 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 displays the Oracle Primavera Unifier interface. On the left, a navigation menu is visible with 'Logs' expanded. A red box highlights 'Contractor Pay Request' in the menu, with a blue circle '2' and an arrow pointing to it. In the main area, a table lists records. A red box highlights a row with 'OCI-100056-01-01 PR2' in the 'Title' column, 'Katie's Contra...' in the 'Contract S...' column, and 'OCI Test General' in the 'Contractor Name' column. A blue circle '3' and an arrow point to this row. On the right, a details panel shows the record's information, including 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), and EDGE Certified Prime? (Yes). A blue circle '4' and an arrow point to the details panel.

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	
KC PR2	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	

# 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 main window shows a record titled "Contractor Pay Request" with a table of records. A red arrow points to the "Workflow Progress" tab in the top right corner. A red box highlights the "Workflow Progress" section, which includes a table of workflow steps.

Title	Record Number	Current Step	BP Setup Used
OCI-100056-01-01...	CPR-0026	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 displays the Oracle Primavera Unifier interface. The left-hand navigation pane shows a list of menu items, with 'Logs' highlighted by a red box and a blue circle labeled '1'. Below 'Logs', 'Contractor Pay Request' is also highlighted by a red box and a blue circle labeled '2'. The main content area shows a table titled 'Contractor Pay Request' with columns for Title, Contract S..., Contractor Name, and Percent ... The table contains several rows of data. A red box and a blue circle labeled '3' highlight the '+ Create' button in the top right corner of the table area.

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	10.0
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	8.0
PR1	Testing	OCI Test General	98.0
TEST	Katie's Contra...	OCI Test General	33.0
Pay Request #3	General Trade...	OCI Test General	33.0
Test Pay Request #2	Testing	OCI Test General	17.0
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	78.0
test	Testing	OCI Test General	78.0

# Add Information to the Record

## Old View:

- ▶ User entered 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

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 Phat \* 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:

Prevaling 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=uuu9176681773#

Create New Contractor Pay Request

General Pay Request Details Added Purchase Orders

Title: \* Matt's Consulting OCI-000081\_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?: \* 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:

Prevaling Wage

Prevaling Wage Report

Type a Contractor Name:

Attachments Comments Linked Records Linked Mail

Published Attachments

Name	Title
ContractScheduleofValu...	
L110-05-CI-2019-JUL-A...	
test view.txt	

Total: 3

# Add Information to the Record

## Old View:

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

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

General Contractor Pay Request

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 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:

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

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1003/261665?\_uref=uuu91766817743#

Create New Contractor Pay Request

General Pay Request Details Added Purchase Orders

General

Title: Matt's Consulting OCI-000081\_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?: 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

Prevailing Wage Report

Type: Contractor Name:

Attachments Comments Linked Records Linked Mail

Published Attachments

Name	Title
<input checked="" type="checkbox"/> ContractScheduleofValu...	
<input checked="" type="checkbox"/> L110-08-CI-2019-JUL-A...	
<input checked="" type="checkbox"/> test view.txt	

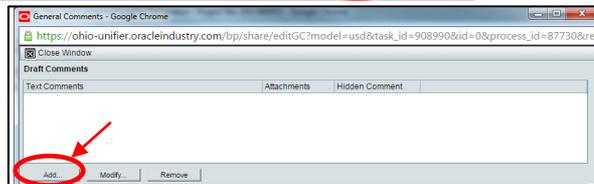
Total: 3

# Add General Comments

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

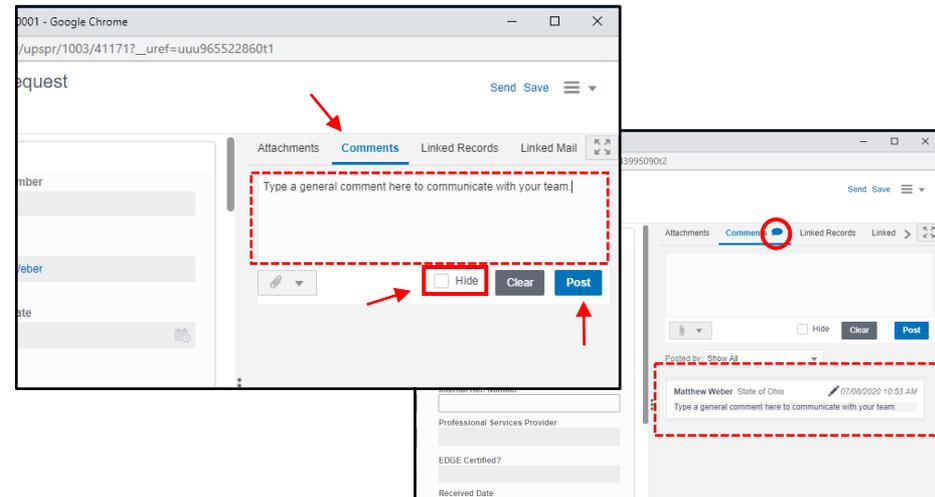
## Old View:

- ▶ User clicked the General Comments at the bottom of the record
- ▶ Clicked Add
- ▶ Entered Comments and clicked OK



## New View:

- ▶ Click the Comments tab located in the right pane of the record
- ▶ Type your comment in the text box
- ▶ **Important:** uncheck Hide to make the comment visible in the record
- ▶ Click Post (the comment will display below once posted)
- ▶ Once added, a blue comment icon will appear next to the tab



# Send the Record

## Old View:

- ▶ User would first choose or verify the correct Workflow Action is selected
- ▶ The Action Details section of the record would display the recipients of the next task

Create New Action Items - Project No. OCI-090004 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMast

File Edit View Actions Help

Workflow Actions: Send

Send Save Spelling.. Undo Accept

Action Items

General

Organization: Department of Administrative Services

Project Number: OCI-090004

Project Name: OAKS CI Training 4

Project Location: 4200 Surface Road

Action Details

Send

To...: Bill Schwertfager,Oaks Instructor,Rita Nichols,§

Cc...

Send For: 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

Subcontractor/Supplier Declaration

Send Save

General

Subcontractor/Supplier Declaration - Matt's Concrete - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2545750/undefined/undefined?\_uref=uuu67572431

General

Organization: OAKS CI Test

Project Number: OCI-080001

Project Name: Agency General

Project Location: OAKS CI Admin

Title: Matt's Concrete

Workflow Action Details

Workflow Actions: Recommend Approval

Send For: Declaration Review

To: Archana Atrey,Matthew Weber,Rita Nichols,Shauna Hooks,Steve Mayo,Project Coordinator

CC: Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send

# Questions?

OAKS CI Support Desk Contact Info:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211



# **Subcontractor/Material Supplier Declaration**

# Purpose & Procedure

- ▶ The Subcontractor Supplier Declaration Business Process (BP):
  - ▶ Provides for the submittal, review, and approval of contractor's subcontractors and material suppliers
  - ▶ Tracks important EDGE and subcontractor information once a subcontractor/supplier is approved
- ▶ Workflow

Created by: **Contractor** → Sent to: **PM Declaration Approval** → Sent to: **PC Declaration Validation** → Sent to: **Contractor Validation Update and Subcontract Attachment (if necessary)**

# Roles & Responsibilities

- ▶ Contractor
  - Creates the declaration and submits it for review
  - Provides additional information regarding EDGE participation
  
- ▶ Project Manager (PM)
  - ▶ Reviews the declaration and accepts or rejects use of the subcontractor/supplier
  
- ▶ Project Coordinator
  - ▶ Reviews and validates the declaration for Drug Free Workplace (DFWP) enrollment and EDGE status

# SMSD Initiation (Contractor)

## ▶ Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

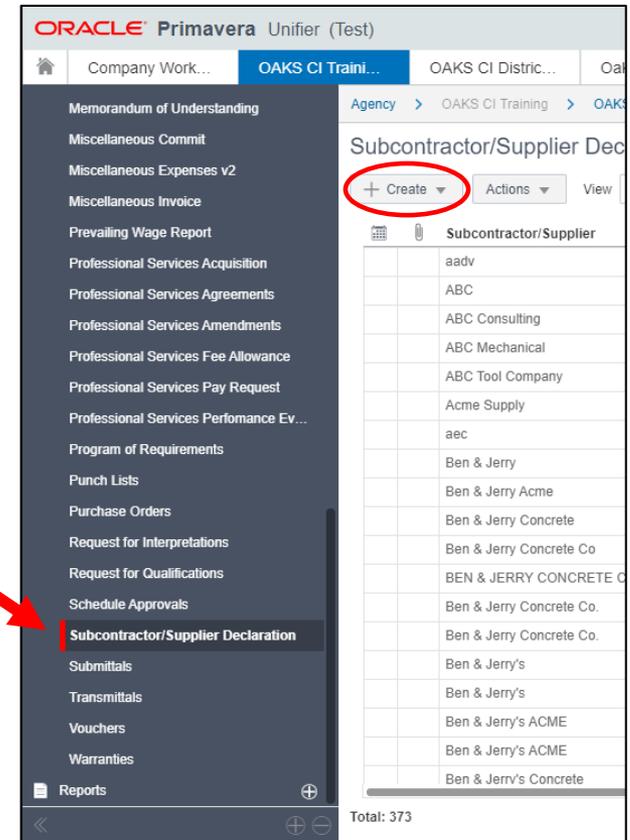
c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...>. The browser tabs include "Service Requests". The application interface shows a search bar with "DPS" entered. A dropdown menu is open, displaying a table of search results. The table has three columns: "Name", "Number", and "Location". The results list various projects, including "Ohio State Highway Patrol Post 44", "OSHP Post 23 LEADS Building", "OSHP ACF Standing Seam Roof Renovation", "LEADS Data Center Alum Creek Facility", "OSHP Academy Range Equip. Replacement", "ODPS - EOC Reorganization", "OSHP Academy Maintenance & Repair Project", "OSHP Alum Creek Crime Lab Addition", "Academy HVAC Replacement-Chiller & Range ...", and "Alum Creek HVAC".

Name	Number	Location
Ohio State Highway Patrol Post 44	DPS:080001	/Agency/Department of Public Safety
OSHP Post 23 LEADS Building	DPS:110001	/Agency/Department of Public Safety
OSHP ACF Standing Seam Roof Renovation	DPS:110003	/Agency/Department of Public Safety
LEADS Data Center Alum Creek Facility	DPS:110006	/Agency/Department of Public Safety
OSHP Academy Range Equip. Replacement	DPS:110009	/Agency/Department of Public Safety
ODPS - EOC Reorganization	DPS:110010	/Agency/Department of Public Safety
OSHP Academy Maintenance & Repair Project	DPS:120001	/Agency/Department of Public Safety
OSHP Alum Creek Crime Lab Addition	DPS:120002	/Agency/Department of Public Safety
Academy HVAC Replacement-Chiller & Range ...	DPS:120004.02	/Agency/Department of Public Safety
Alum Creek HVAC	DPS:130001	/Agency/Department of Public Safety

# SMSD Initiation (Contractor)

- ▶ To create the Contract record in OAKS CI navigate to:
  - ▶ Logs -> Subcontractor/Supplier Declaration
  - ▶ Click Create or New



# SMSD Initiation (Contractor)

- Enter **Title** (the title should house the name of the company utilized)
- Click the Select button next to **Contract Name**
- Choose appropriate **Contract**
- Click **Select**

The screenshot shows the 'Create New Subcontractor/Supplier Declaration' web application. The 'General' form is visible on the left, and a 'Contract' selection modal is open on the right. The modal displays a table of contracts with columns for Contract No., Contractor Name, Title, Original Contract Completion, Status, and Total. The first row is highlighted in red, and a blue callout 'c' points to it. The 'Title' field in the form is highlighted in red, and a blue callout 'a' points to it. The 'Contract Name' dropdown is highlighted in red, and a blue callout 'b' points to it. The 'Select' button in the modal is highlighted in red, and a blue callout 'd' points to it.

Contract No.	Contractor Name	Title	Original Contract Completion	Status	Total
9876543210	Matt's Vendor	Matt's Contract	07/28/2021 05:00 ...	Approved	
9876543210	Matt's Vendor	Matt's Contract		Pending	
123456789	Matt's Vendor	Contract MMW 001		Pending	
TEST NUMBER	OAKS Plumbing	TEST		Pending	
OCI-080001-03	OAKS Plumbing	Fred 20091008	10/23/2010 10:00 ...	Final_Approved	
412361	OAKS Plumbing	Stored Mat Test 1	10/03/2020 05:00 ...	Final_Approved	
15	OAKS Plumbing	mmw-contract test	03/15/2020 06:00 ...	Final_Approved	
DRC-1	Random Roofing and Repair	Test DRC	12/05/2014 08:00 ...	Final_Approved	
DAS-0006	Random Roofing and Repair	Computer Class -0001	03/04/2013 08:00 ...	Final_Approved	
070915	Random Roofing and Repair	CMR-DB Test		Final_Approved	
001	Random Roofing and Repair	TJ test for RN	08/24/2014 10:00 ...	Final_Approved	

# SMSD Initiation (Contractor)

## e) Scroll down the form to complete the **Declaration Information**

- ▶ Required fields are marked with \*
- ▶ Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub

e

The screenshot shows a web browser window with the title 'Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7528/17\_uref=uuu529571602t2'. The page content includes a 'General' tab and a 'Declaration Information' section. The 'Tier 1' dropdown menu is highlighted with a red box and a red arrow. The 'Subcontracted by:' field is empty. The 'Attachments' section on the right shows 'No Attachments'.

Declaration Information	
Type *	Material Supplier
Tier 1 *	Yes
Subcontractor/Supplier *	Matt's Consultant
Federal Tax ID *	1234567890
Primary Officer 1 *	Matt's Officer
Address Line 1 *	30 W Spring St
Address Line 2	
City *	Columbus
State *	Ohio
ZIP *	43215
Contact Person *	Matt's Contact
Phone No. *	614-555-5555
Fax No. *	N/A
E-mail Address *	matt@email.com

# SMSD Initiation (Contractor)

f) Scroll down the form to complete the **Additional Details** section

- ▶ Required fields are marked with \*

Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7528/1?\_uref=uuu529571602t2

### Create New Subcontractor/Supplier Declaration

Send Save

General

▶ General

▶ Declaration Information

▲ Additional Details

Subcontractor/P.O. Date MM/DD/YYYY HH:MM AM	DFSP Enrolled * Yes
Subcontractor/P.O. Amount \$ * 1,000,000.00	EDGE Certified? * Yes
Services/Material Brands * Concrete	EDGE Certification Number * 1234567890
Skilled Trade License No.	MBE Select

▶ Publish Path

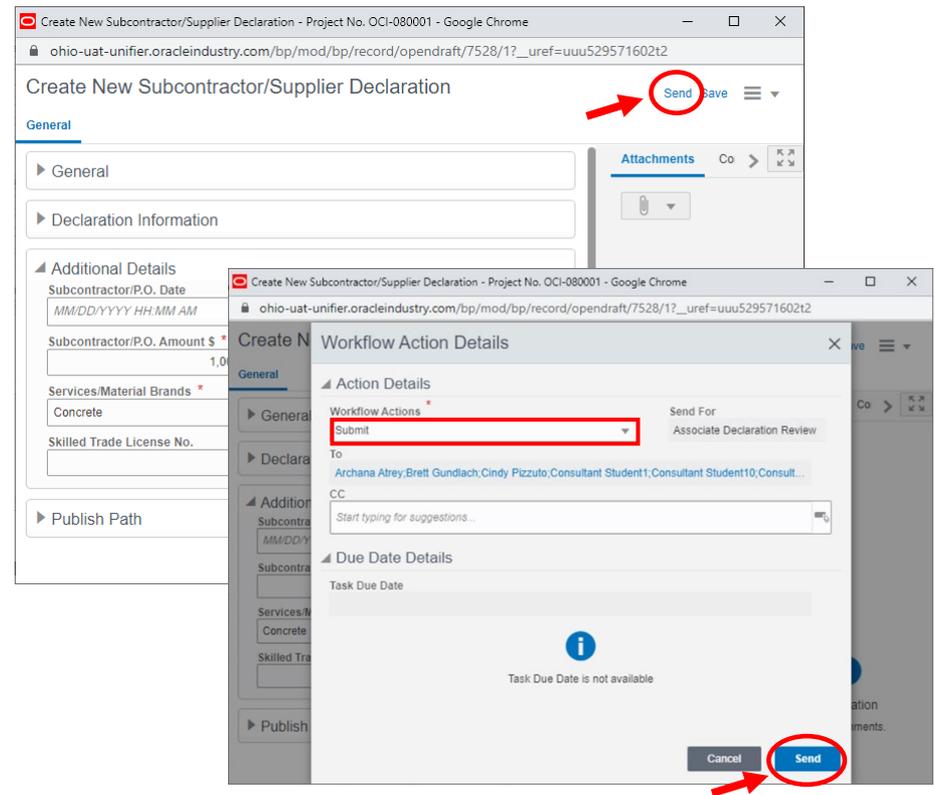
Attachments Co

No Attachments.

Information

# SMSD Initiation (Contractor)

- ▶ When the record is ready to move forward, click the **Send** button at the top of the record
- ▶ Verify Workflow Action: **Submit**
- ▶ Click **Send**



# Project Manager Receives an Email

- ▶ Click on the “Unifier Login” button to access the task

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

**Project/Shell: OAKS CI Training 1**

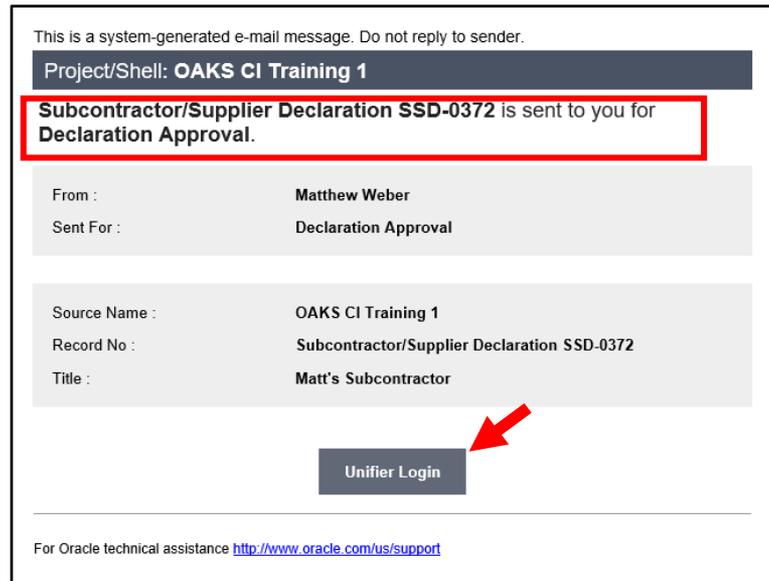
**Subcontractor/Supplier Declaration SSD-0372 is sent to you for Declaration Approval.**

From : Matthew Weber  
Sent For : Declaration Approval

Source Name : OAKS CI Training 1  
Record No : Subcontractor/Supplier Declaration SSD-0372  
Title : Matt's Subcontractor

**Unifier Login**

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



# PM Declaration Approval

- ▶ Click Accept Task

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

- Browser Tab:** Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome
- URL:** ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214186?task\_id=214186&parent\_id=0&viewOnly=0&project\_id=1006&model=u...
- Page Title:** Subcontractor/Supplier Declaration
- Buttons:** Accept, Decline, and a menu icon.
- Task Details:**
  - From:** Matthew Weber
  - To:** Archana Atrey, Cindy Pizzuto, Consultant Student1, Consultant Student10, Consultant Stud...
  - Sent For:** Declaration Approval
- General Information:**

Organization	Department of Administrative Services	Record Number	SSD-0374
Project Number	OCI-080001	Creation Date	07/28/2020 02:37 PM (UTC-8)
Project Name	OAKS CI Training 1	Creator	Matthew Weber
Project Location	Surface Road	Status	Pending
Title	SMSD Matt's Contractor		
- Attachments:** Information icon, No Attachments.

# PM Declaration Approval

- ▶ Review the Subcontractor/Supplier Declaration record

The screenshot displays a web browser window with the title "Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214186/undefined/undefined?\_\_uref=uuu745200052t2". The page title is "Subcontractor/Supplier Declaration" with "Send Save" and a menu icon in the top right.

The main content area is titled "General" and contains the following fields:

Organization Department of Administrative Services	Record Number SSD-0374
Project Number OCI-080001	Creation Date 07/28/2020 02:37 PM (UTC-8)
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Location Surface Road	Status Pending
Title SMSD Matt's Contractor	
Contract Name Matt's Contract	Contractor Name Matt's Vendor
Professional Services Agreement Name	

Below the main form are three expandable sections:

- ▶ Declaration Information
- ▶ Additional Details
- ▶ Publish Path

On the right side, there is an "Attachments" panel with a "Cont" button and a vertical ellipsis. Below it is an "Information" icon and the text "No Attachments."

# PM Declaration Approval

- ▶ Choose Workflow Action: **Approve**
- ▶ Click **Send**

The screenshot shows a web browser window with the URL `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214186/undefined/undefined?_uref=uuu745200...`. A modal dialog titled "Workflow Action Details" is open. It has a "General" tab selected. Under "Action Details", the "Workflow Actions" dropdown is set to "Approve". The "Send For" field is "Declaration Validation". The "To" field contains a list of names: "Archana Atrey, Cindy Pizzuto, Matthew Weber, Moenique Morris, Purna Irukulapati, Rita Nichols, Ta...". The "CC" field is empty with a placeholder "Start typing for suggestions...". Under "Due Date Details", the "Task Due Date" field is empty, and a message below it says "Task Due Date is not available". At the bottom right, there are "Cancel" and "Send" buttons. A red arrow points to the "Send" button.

# PC Validation Step

- ▶ PC receives an Email
- ▶ Click on the “Unifier Login” button to access the task

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

**Project/Shell: Agency General Projects Test**

**Contractor Pay Request CPR-0029 is sent to you for PC Review and Validation.**

From : Shauna Hooks  
Sent For : PC Review and Validation

Source Name : Agency General Projects Test  
Record No : Contractor Pay Request CPR-0029  
Title : testshauna

[Unifier Login](#)



# PC Validation Step

- ▶ Click Accept Task

The screenshot shows a web browser window displaying a task record for 'Subcontractor/Supplier Declaration'. The browser's address bar shows the URL: `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194?task_id=214194&parent_id=0&viewOnly=0&project_id=1006&model=usd&_uref=uuu74...`. The page title is 'Subcontractor/Supplier Declaration'. In the top right corner, there are two buttons: 'Accept' and 'Decline'. The 'Accept' button is circled in red, and a red arrow points to it from the left. Below the header, there is a 'General' tab selected. The main content area is divided into two sections: 'Task Details' and 'General'. The 'Task Details' section shows 'From: Matthew Weber', 'To: Archana Atrey;Cindy Pizzuto;Matthew Weber;Moenique Morris;Purna Irukulapati;Rita Nichols;Tambra ...', and 'Sent For: Declaration Validation'. The 'General' section displays various fields: Organization (Department of Administrative Services), Record Number (SSD-0374), Project Number (OCI-080001), Creation Date (07/28/2020 02:37 PM (UTC-8)), Project Name (OAKS CI Training 1), Creator (Matthew Weber), Project Location (Surface Road), Status (Pending), and Title (SMSD Matt's Contractor). On the right side, there is an 'Attachments' section with a tab labeled 'Attachments' and a sub-section titled 'Information' with the text 'No Attachments'.

# PC Validation Step

- ▶ If this is a Tier 1 Subcontractor attach the subcontractor agreement or return to Contractor for attachment

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

- Browser Tab:** Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome
- URL:** ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_uref=uuu745200052t2
- Page Title:** Subcontractor/Supplier Declaration
- Buttons:** Send, Save, and a menu icon.
- Section:** General
- Instruction:** Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.
- Form Fields:**
  - Declaration Information:**
    - Type:** Material Supplier
    - Tier 1:** Yes (highlighted with a red box)
    - Subcontractor/Supplier:** Matt's Consultant
    - Federal Tax ID:** 1234567890
    - Primary Officer 1:** Matt's Officer
    - Address Line 1:** 30 W Spring St
- Attachments:** A tab labeled "Attachments" is highlighted with a red circle and an arrow pointing to it. Below it is an "Add Attachment" icon.
- Information Panel:** A blue information icon with the text "Information No Attachments."

# PC Validation Step

- ▶ Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.

Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_uref=uuu745200052t2

### Subcontractor/Supplier Declaration

Send Save

General

Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.

Attachments Comms

General

Declaration Information

Type	Tier 1
Material Supplier	Yes
Subcontractor/Supplier	Subcontracted by:
Matt's Consultant	
<b>Federal Tax ID</b>	
1234567890	

Primary Offices 1

Matt's Officer

Address Line 1

30 W Spring St

Information  
No Attachments.

Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_uref=uuu745200052t2

### Subcontractor/Supplier Declaration

Send Save

General

Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.

Attachments Comms

General

Declaration Information

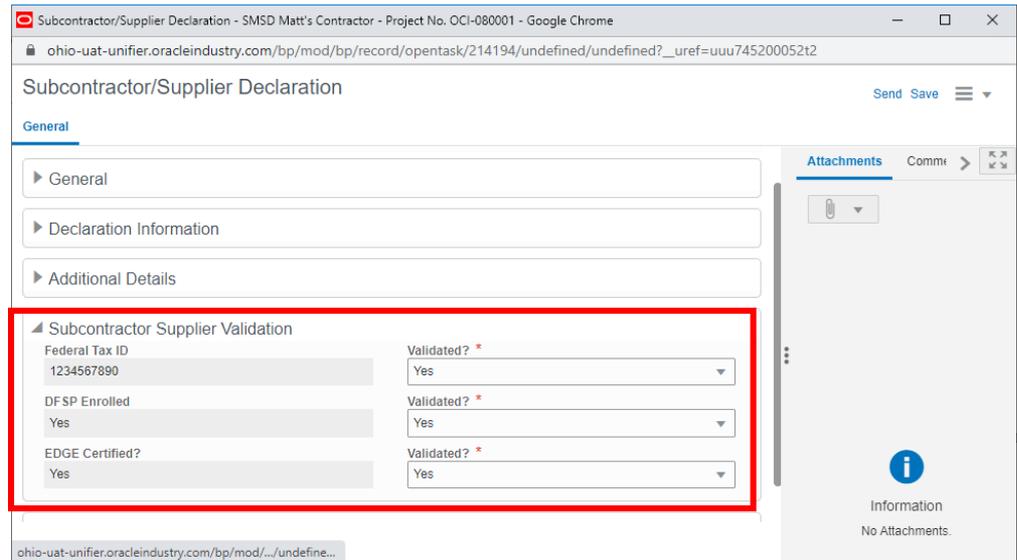
Additional Details

Subcontractor/P.O. Date	DFWP Enrolled
	Yes
Subcontractor/P.O. Amount \$	EDGE Certified?
1,000,000.00	Yes
Services/Material Brands	EDGE Certification Number
Concrete	1234567890
Skilled Trade License No.	MBE

Information  
No Attachments.

# PC Validation Step

- ▶ Fill out Subcontractor Supplier Validation required fields



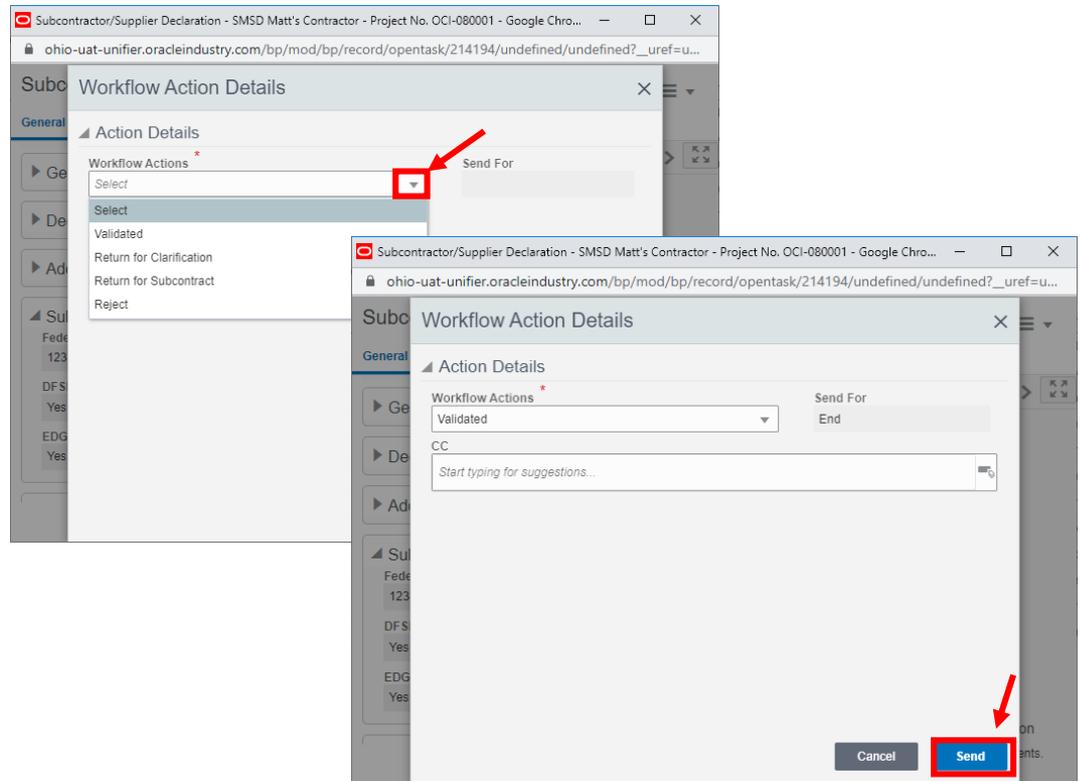
The screenshot shows a web browser window with the title 'Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_\_uref=uuu745200052t2'. The page title is 'Subcontractor/Supplier Declaration' and it has 'Send Save' and a menu icon in the top right. The 'General' tab is active, showing three expandable sections: 'General', 'Declaration Information', and 'Additional Details'. A red arrow points to the 'Subcontractor Supplier Validation' section, which is highlighted with a red border. This section contains three rows of fields:

Field	Value	Validated? *
Federal Tax ID	1234567890	Yes
DFSP Enrolled	Yes	Yes
EDGE Certified?	Yes	Yes

On the right side of the form, there is an 'Attachments' section with a 'Comm' button and a vertical scrollbar. At the bottom right, there is an 'Information' icon and the text 'Information No Attachments.' The browser's address bar at the bottom shows 'ohio-uat-unifier.oracleindustry.com/bp/mod/.../undefine...'

# PC Validation Step

- ▶ Choose the appropriate Workflow Action and click **Send**



# Validation Links

- Use this link to validate Drug Free Safety Workplace for subcontractors:
  - <https://www.bwc.ohio.gov/employer/services/StateContract/nlbwc/StateContract1.aspx>
- Use this link to validate EDGE for subcontractors and material suppliers:
  - <https://eodreporting.oit.ohio.gov/edge-certification>

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211

# **Contract Schedule of Values (SOV)**

# Purpose & Procedure

- ▶ Provides for the submission, review, and approval of the Contractor's Schedule of Values.
- ▶ Submitted and approved SOV in this business process becomes the basis for all future Contractor Pay Requests.
- ▶ Workflow  
Created by: Contractor → Sent to: PC Review → Sent to: Contractor  
Update (if necessary) → Sent to: PM Approval

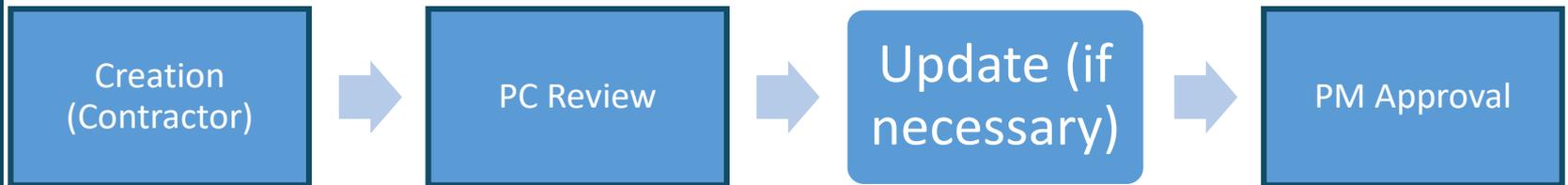
# Getting Started

- ▶ Prior to submitting any request for payment, the Contractor must prepare and have approved a detailed Schedule of Values (SOV) that clearly and accurately reflects the costs of labor and materials including profit and overhead for each item of work.



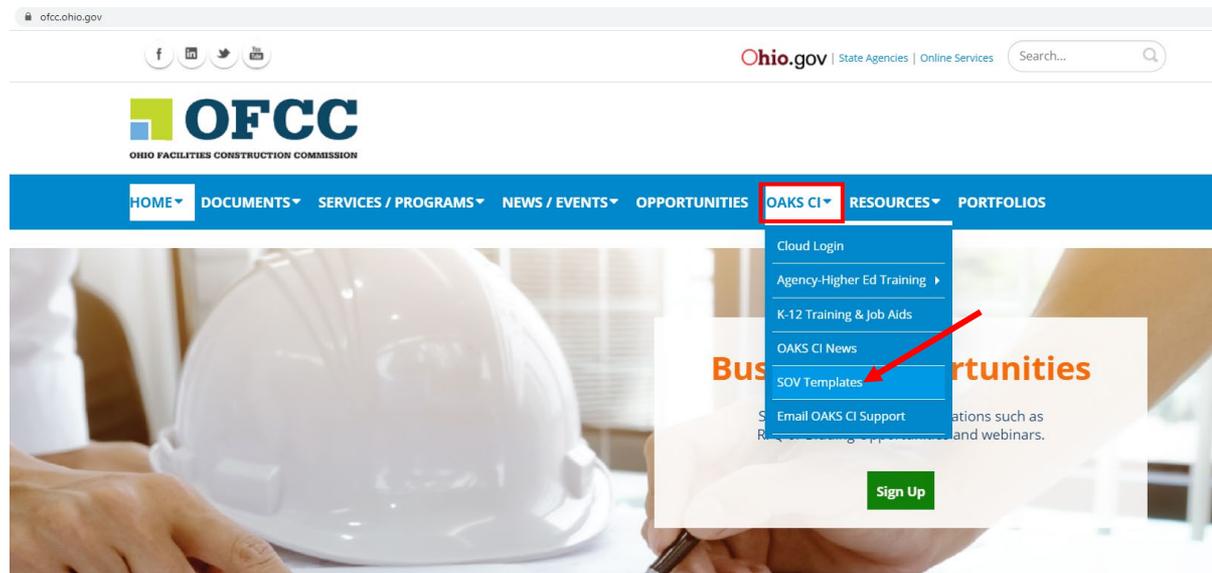
# Contract Schedule of Values (SOV)

- ▶ Workflow Steps



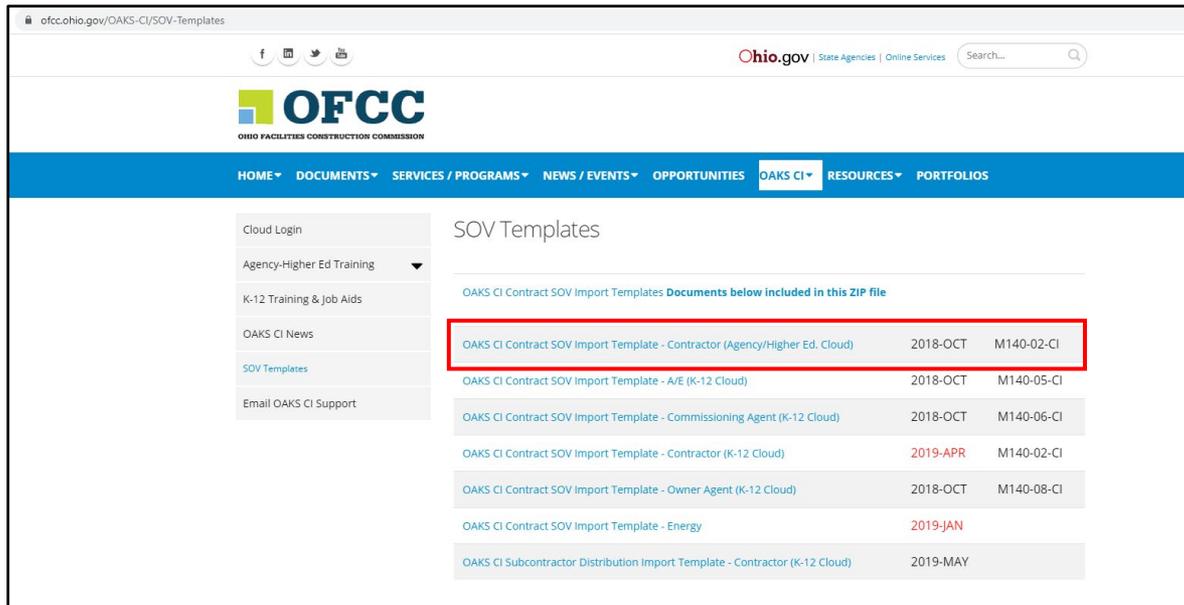
# Locate the Spreadsheet (Contractor)

- ▶ Step 1: Download Excel spreadsheet from website: <http://ofcc.ohio.gov>
  - ▶ Hover your mouse over the OAKS CI tab
    - ▶ Click- SOV Templates



# Locate the Spreadsheet (Contractor)

- ▶ Click - “OAKS CI Contract SOV Import Template – Contractor”

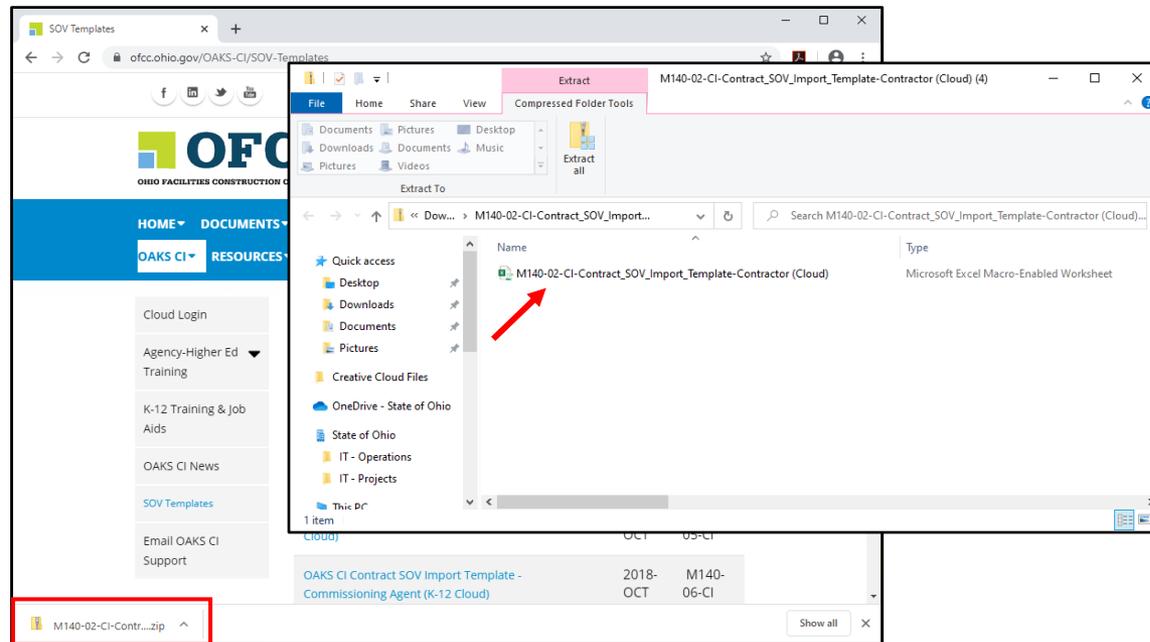


The screenshot shows the OFCC website interface. The header includes the OFCC logo and navigation links. The main content area is titled "SOV Templates" and lists several import templates. The first entry, "OAKS CI Contract SOV Import Template - Contractor (Agency/Higher Ed. Cloud)", is highlighted with a red box. Below the list, there is a note: "OAKS CI Contract SOV Import Templates Documents below included in this ZIP file".

Template Name	Year	Code
OAKS CI Contract SOV Import Template - Contractor (Agency/Higher Ed. Cloud)	2018-OCT	M140-02-CI
OAKS CI Contract SOV Import Template - A/E (K-12 Cloud)	2018-OCT	M140-05-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (K-12 Cloud)	2018-OCT	M140-06-CI
OAKS CI Contract SOV Import Template - Contractor (K-12 Cloud)	2019-APR	M140-02-CI
OAKS CI Contract SOV Import Template - Owner Agent (K-12 Cloud)	2018-OCT	M140-08-CI
OAKS CI Contract SOV Import Template - Energy	2019-JAN	
OAKS CI Subcontractor Distribution Import Template - Contractor (K-12 Cloud)	2019-MAY	

# Open the Spreadsheet (Contractor)

- ▶ Step 2: Open downloaded Excel spreadsheet



# Enter Contract SOV Line Items (Contractor)

## ▶ Step 3:

- ▶ Include **ONLY** EDGE Subcontractors/Suppliers

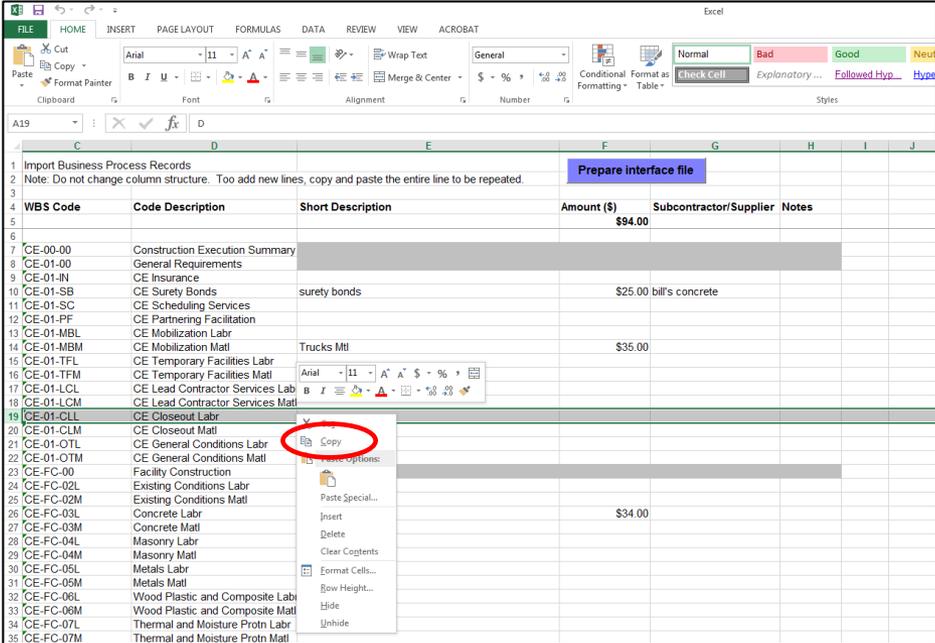
**Note:** If the Subcontractor/Supplier is **EDGE**, type **(EDGE)** next to your short description

- ▶ Make sure to spell the name of the Subcontractor/Supplier **EXACTLY** the way it is reflected on the Subcontractor/Supplier Declaration record in OAKS CI

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
			\$13,000.00		
7	CE-00-00	Construction Execution Summary			
8	CE-01-00	General Requirements			
9	CE-01-IN	CE Insurance			
10	CE-01-SB	CE Surety Bonds			
11	CE-01-SC	CE Scheduling Services			
12	CE-01-PF	CE Partnering Facilitation			
13	CE-01-MBL	CE Mobilization Labor	\$8,000.00	Mac's Mobiles	
14	CE-01-MBM	CE Mobilization Matl			
15	CE-01-TFL	CE Temporary Facilities Labr			
16	CE-01-TFM	CE Temporary Facilities Matl			
17	CE-01-LCL	CE Lead Contractor Services Labr			
18	CE-01-LCM	CE Lead Contractor Services Matl			
19	CE-01-CLL	CE Closeout Labr			
20	CE-01-CLM	CE Closeout Matl			
21	CE-01-OTL	CE General Conditions Labr			
22	CE-01-OTM	CE General Conditions Matl			
23	CE-FC-00	Facility Construction			
24	CE-FC-02L	Existing Conditions Labr			
25	CE-FC-02M	Existing Conditions Matl			
26	CE-FC-03L	Concrete Labr	\$5,000.00	Joe's Concrete	
27	CE-FC-03M	Concrete Matl			

# Adding Additional Lines (Contractor)

- ▶ Step 4: If necessary, add additional lines to the SOV spreadsheet
  - ▶ Left click on the number of the line to highlight it
  - ▶ Right click and choose copy



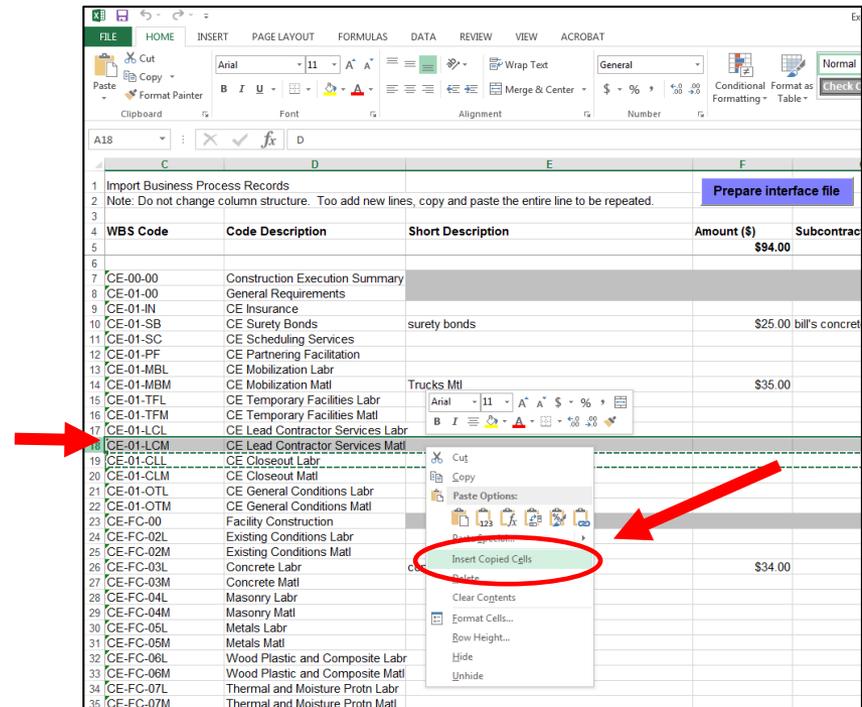
The screenshot shows an Excel spreadsheet with a table of construction items. The table has columns for WBS Code, Code Description, Short Description, Amount (\$), Subcontractor/Supplier, and Notes. Row 19 is highlighted, and a context menu is open over it with 'Copy' selected. A red arrow points to row 19.

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
19	CE-01-CLL	CE Closeout Labr			
20	CE-01-CLM	CE Closeout Matl			
21	CE-01-OTL	CE General Conditions Labr			
22	CE-01-OTM	CE General Conditions Matl			
23	CE-FC-00	Facility Construction			
24	CE-FC-02L	Existing Conditions Labr			
25	CE-FC-02M	Existing Conditions Matl			
26	CE-FC-03L	Concrete Labr			
27	CE-FC-03M	Concrete Matl			
28	CE-FC-04L	Masonry Labr			
29	CE-FC-04M	Masonry Matl			
30	CE-FC-05L	Metals Labr			
31	CE-FC-05M	Metals Matl			
32	CE-FC-06L	Wood Plastic and Composite Labr			
33	CE-FC-06M	Wood Plastic and Composite Matl			
34	CE-FC-07L	Thermal and Moisture Protn Labr			
35	CE-FC-07M	Thermal and Moisture Protn Matl			

# Adding Additional Lines (Contractor)

- ▶ Step 4 (cont.):

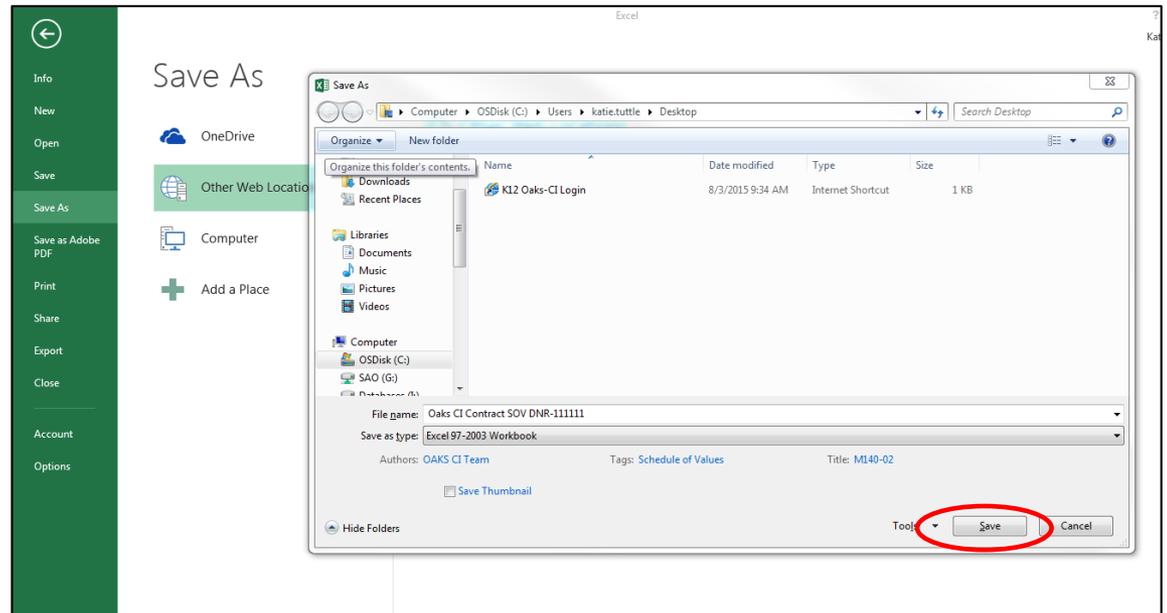
- ▶ Right click on the line you want to be **below** the line you are inserting
- ▶ Choose insert copied cells
- ▶ Your line will show up above the selected line. You can edit the text in the line as necessary



# Save the Spreadsheet (Contractor)

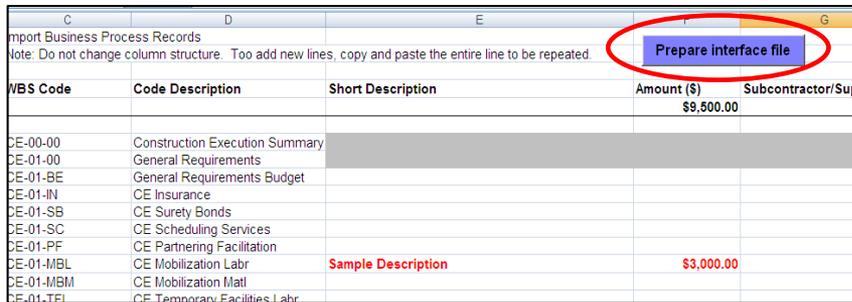
▶ Step 5:

▶ **Name and Save the Spreadsheet - Very Important!**



# Prepare Spreadsheet (Contractor)

- ▶ Step 6:
  - ▶ **Make sure you have reviewed your spreadsheet with the A/E and PM**
  - ▶ **Click “Prepare Interface File”**



Import Business Process Records  
Note: Do not change column structure. To add new lines, copy and paste the entire line to be repeated.

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Sup
			\$9,500.00	
CE-00-00	Construction Execution Summary			
CE-01-00	General Requirements			
CE-01-BE	General Requirements Budget			
CE-01-IN	CE Insurance			
CE-01-SB	CE Surety Bonds			
CE-01-SC	CE Scheduling Services			
CE-01-PF	CE Partnering Facilitation			
CE-01-MBL	CE Mobilization Labor	Sample Description	\$3,000.00	
CE-01-MBM	CE Mobilization Matl			
CE-01-TEI	CE Temporary Facilities Labor			

This box will appear indicating the file preparation is complete.



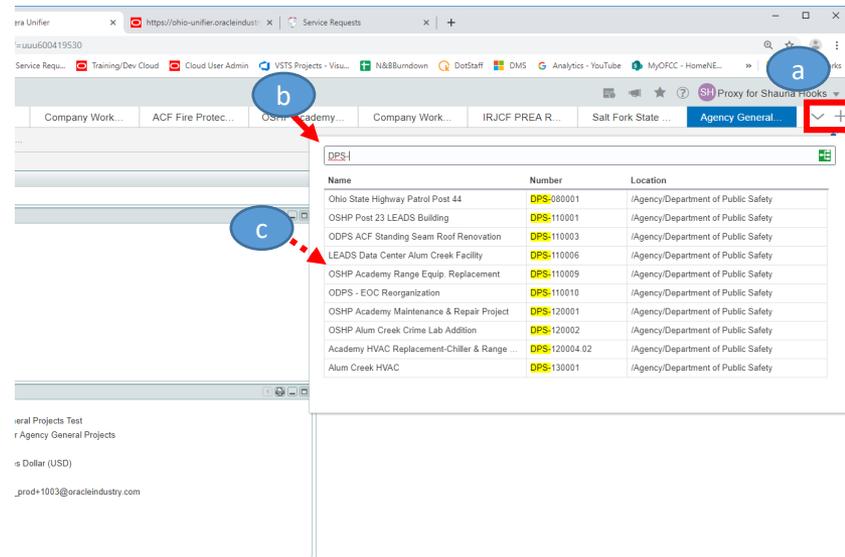
# Create New Contract SOV Record (Contractor)

- Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open



# Create New Contract SOV Record (Contractor)

- ▶ In OAKS CI navigate to:
  - ▶ Logs -> Contract Schedule of Values
  - ▶ Click **Create**

The screenshot displays the Oracle Primavera Unifier interface. The left-hand navigation menu is visible, with the 'Logs' section expanded to show 'Contract Schedule of Values'. A red arrow points to the 'Subcontractor/Supplier Declaration' option in this menu. In the main content area, the 'Subcontractor/Supplier Declaration' table is shown. The table has a 'Create' button circled in red, and the 'Subcontractor/Supplier' column is also circled in red. The table contains a list of subcontractor names, including 'Tom and Jerrys ACME', 'aadv', 'ABC', 'ABC Consulting', 'ABC Mechanical', 'ABC Tool Company', 'Acme Supply', 'aec', 'Ben & Jerry', 'Ben & Jerry Acme', 'Ben & Jerry Concrete', 'Ben & Jerry Concrete Co', 'BEN & JERRY CONCRETE', 'Ben & Jerry Concrete Co.', 'Ben & Jerry Concrete Co.', 'Ben & Jerry's', 'Ben & Jerry's', 'Ben & Jerry's ACME', and 'Ben & Jerry's ACME'. The total number of records is indicated as 'Total: 374' at the bottom right.

Subcontractor/Supplier
Tom and Jerrys ACME
aadv
ABC
ABC Consulting
ABC Mechanical
ABC Tool Company
Acme Supply
aec
Ben & Jerry
Ben & Jerry Acme
Ben & Jerry Concrete
Ben & Jerry Concrete Co
BEN & JERRY CONCRETE
Ben & Jerry Concrete Co.
Ben & Jerry Concrete Co.
Ben & Jerry's
Ben & Jerry's
Ben & Jerry's ACME
Ben & Jerry's ACME

# Enter Information Into the Record (Contractor)

- Complete the Upper Form (General Tab)
- Everything with a Red \* is required

Create New Contract Schedule of Values - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucsov/1006/253?\_\_uref=uuu74520005212

### Create New Contract Schedule of Values

Send Save

**General** Contracts SOV Details

**General**

Organization Department of Administrative Services	Record Number
Project Number OCI-080001	Creator Matthew Weber
Project Name OAKS CI Training 1	Creation Date
Project Location Surface Road	Status
Title * Fred 20091009 OAKS Plumbing	Fee Title SAO Standard Fee 1

**Contract Information**

Contract No. * DRC-12001	Contractor Name Sands Decker Ltd.
Trade General Contractor	Total Contract Amount 350,000.00
EDGE Certified Prime? No	Line Item Total (\$) 350,000.00
	Difference (\$) 0.00

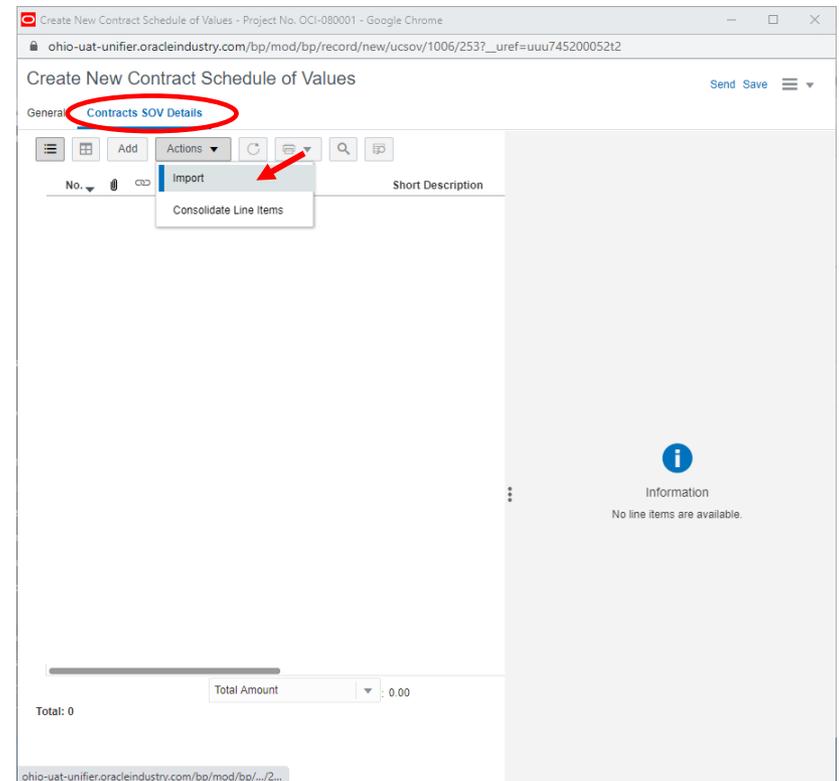
Notes

Attachments Comments

Information  
No Attachments

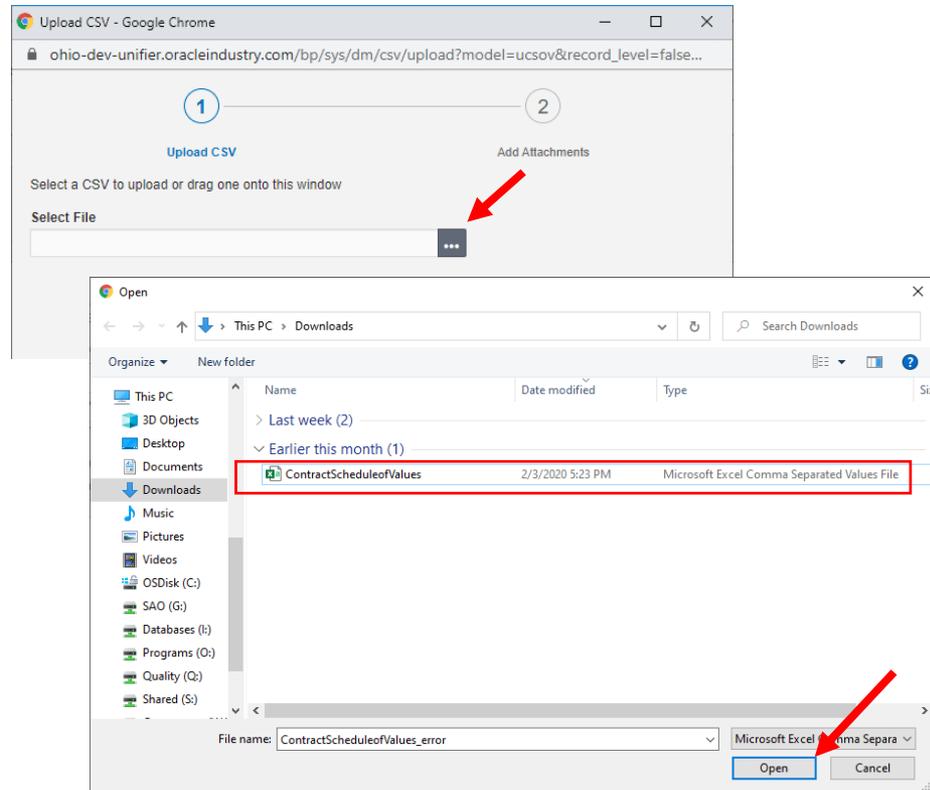
# Import Spreadsheet (Contractor)

- ▶ Click on the Contract SOV Details Tab
- ▶ Click Actions -> Import



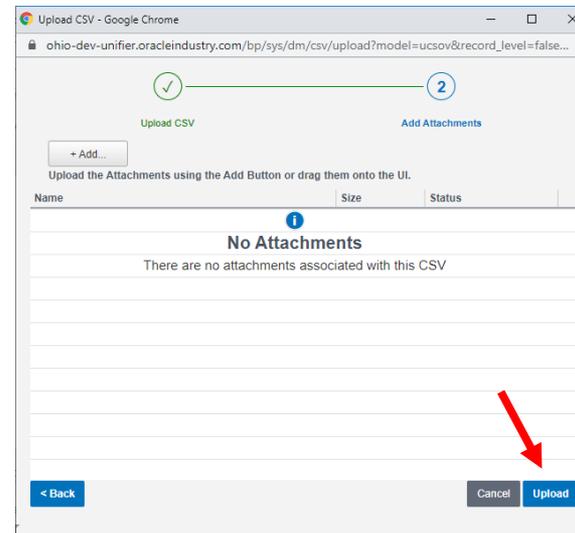
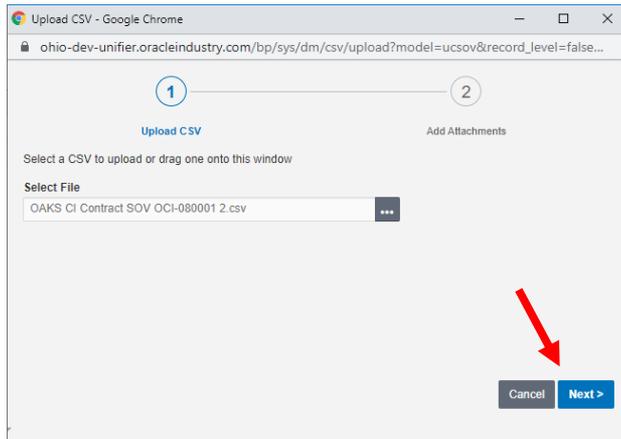
# Import Spreadsheet (Contractor)

- ▶ Click the menu button next to Select File
- ▶ Navigate to and select the “Comma Separated Values (CSV File)” of your spreadsheet
- ▶ Click **Open**



# Import Spreadsheet (Contractor)

- ▶ Click the **Next** button
- ▶ Click the **Upload** button
  - ▶ If successful, the upload window will close, and the line items will be added
  - ▶ If you receive an error, see [Contract SOV Error](#) section



# Review Imported Line Items (Contractor)

- ▶ When all SOV Line Item entries are imported:
  - ▶ Review the SOV information summary in the Contracts SOV Detail Pane
  - ▶ Verify that the total value in the Contract Amount Detail Block and the total amount in the WBS Detail pane are equal and the Difference(\$ ) value is zero (0.00)

The screenshot displays the 'Create New Contract Schedule of Values' interface. The main table lists line items with columns for No., WBS Code, Code Name, Short Description, Amount (\$), and Subco. The total amount is 350,000.00. A summary pane on the right shows the Contractor Name as Sands Decker Ltd., Total Contract Amount as 350,000.00, Line Item Total (\$ ) as 350,000.00, and Difference (\$) as 0.00. A red box highlights the 'Difference (\$)' field in the summary pane, and another red box highlights the 'Total Amount' field in the table footer.

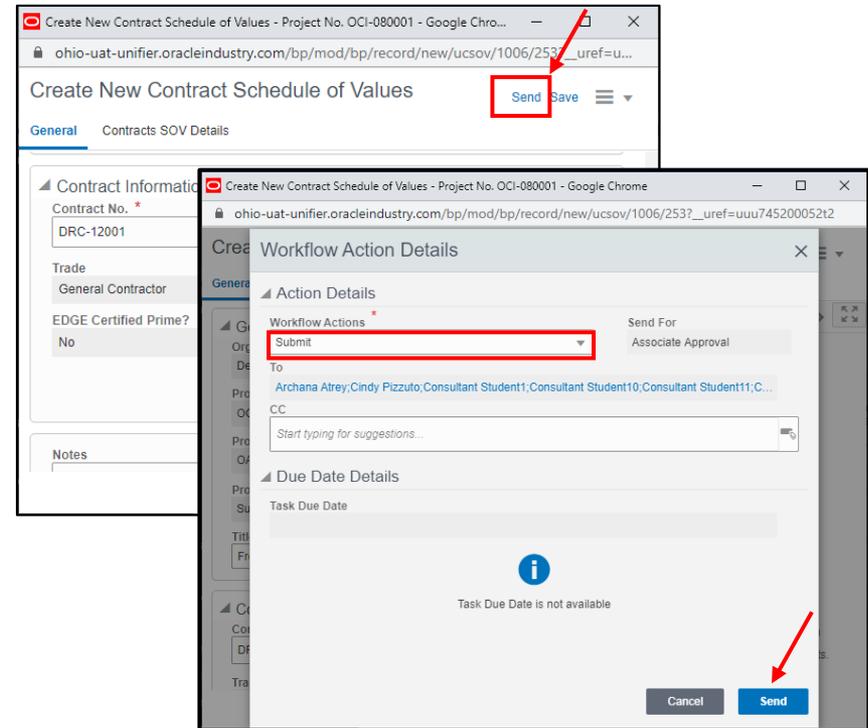
No.	WBS Code	Code Name	Short Description	Amount (\$)	Subco
005	CE-01-IN	CE Insurance	insurance	40,000.00	
004	CE-FC-03L	Concrete Labr	concrete labor 3	70,000.00	
003	CE-FC-03L	Concrete Labr	concrete, labor 2	70,000.00	
002	CE-FC-03M	Concrete Matl	material - concrete	100,000.00	
001	CE-FC-03L	Concrete Labr	labor - concrete	70,000.00	

Total: 5  
Total Amount : 350,000.00

Contractor Name: Sands Decker Ltd.  
Total Contract Amount: 350,000.00  
Line Item Total (\$ ): 350,000.00  
Difference (\$ ): 0.00

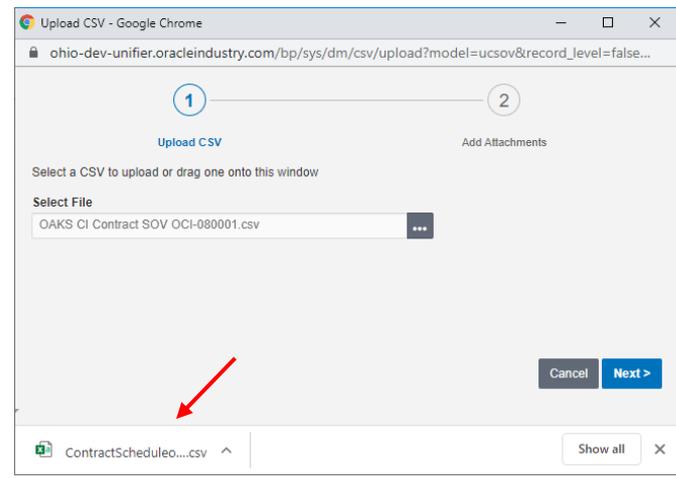
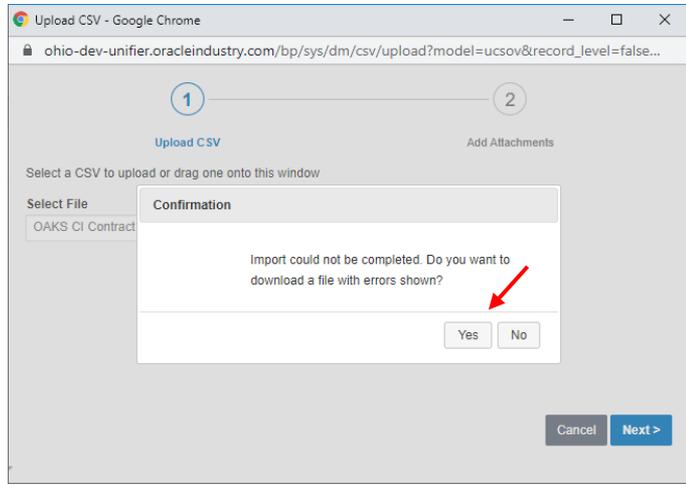
# Complete Contract SOV (Contractor)

- ▶ When the record is ready to move forward, click **Send**
- ▶ Verify Workflow Action: **Submit**
- ▶ Click **Send**



# SOV Import Error (Contractor)

- ▶ If the CSV file had an error while importing, you will see the confirmation message below
- ▶ Click **Yes**
- ▶ An Excel file called **ContractScheduleofValues\_error** will be downloaded
- ▶ Open the Excel File



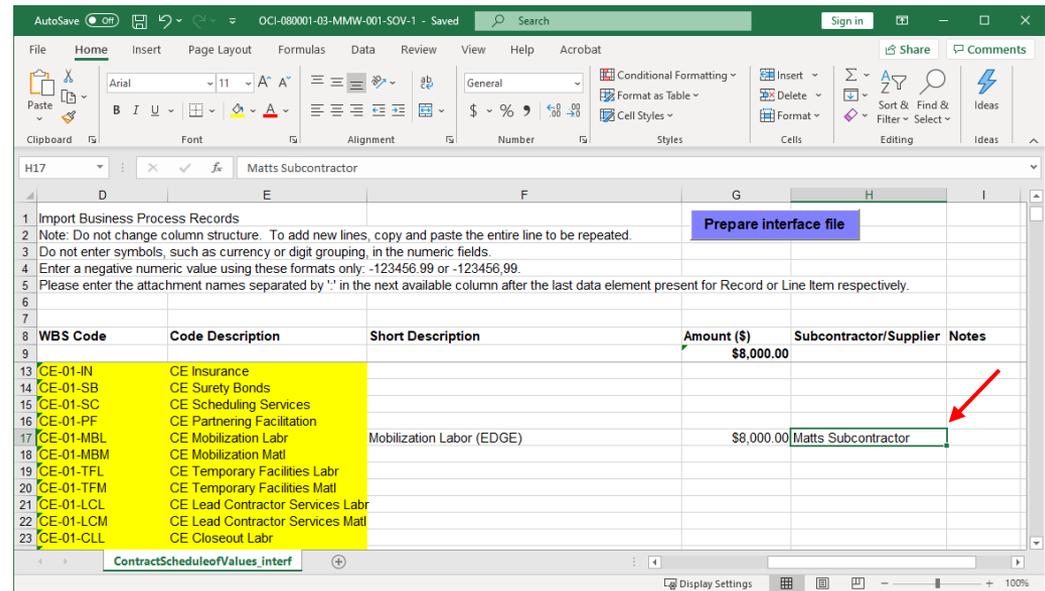
# SOV Import Error (Contractor)

- ▶ The error will be described in the bottom row of the file
  - ▶ If there is an error that states **“(Your Subcontractor Name) is invalid value for gen\_subcont\_supplier\_bp”**, then the name of the subcontractor was likely entered differently than how it exists in OAKS CI.
  - ▶ If there is any other type of error, contact the [OAKS CI Help Desk](#) for assistance

	A	B	C	D	E	F	G
1	Import Business Process detail items						
2							
3	Note: Do not change column structure						
4							
5	Do not enter symbols, such as currency or digit grouping, in the numeric fields.						
6							
7	Enter a negative numeric value using these formats only: -123456.99 or -123456,99.						
8							
9	Please enter the attachment names separated by ',' in the next available column after the last data element present for Record or Line Item respectively.						
10							
11	D	Group Name	WBS Code	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
12							
13	D		CE-00-00~~CE-01-00~~CE-01-MBL	Mobilization Labor (EDGE)	8000	Matts Subcontractor	Imported 2/25/2020
14	Matts Subcontractor is invalid value for gen_subcont_supplier_bp.						
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							

# SOV Import Error (Contractor)

- ▶ Open the Excel file you saved in the [previous section](#) prior to clicking the Prepare Interface File button
- ▶ Find the Subcontractor/Supplier name referenced in the error file



The screenshot shows an Excel spreadsheet with the following data:

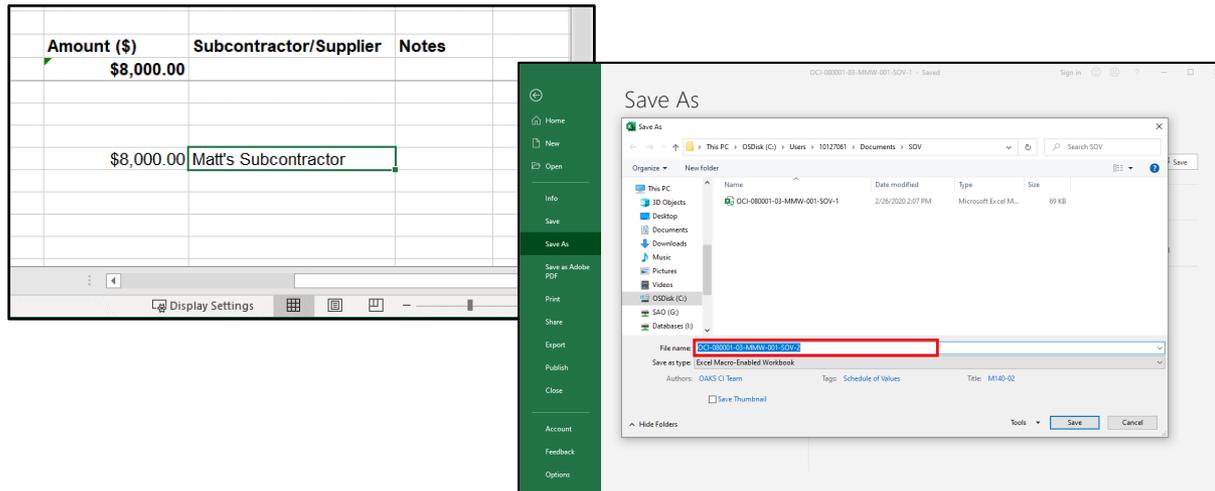
WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
13	CE-01-IN	CE Insurance			
14	CE-01-SB	CE Surety Bonds			
15	CE-01-SC	CE Scheduling Services			
16	CE-01-PF	CE Partnering Facilitation			
17	CE-01-MBL	CE Mobilization Labor	\$8,000.00	Matts Subcontractor	
18	CE-01-MBM	CE Mobilization Matl			
19	CE-01-TFL	CE Temporary Facilities Labor			
20	CE-01-TFM	CE Temporary Facilities Matl			
21	CE-01-LCL	CE Lead Contractor Services Labor			
22	CE-01-LCM	CE Lead Contractor Services Matl			
23	CE-01-CLL	CE Closeout Labor			

A red arrow points to the cell containing 'Matts Subcontractor' in the 'Subcontractor/Supplier' column of row 17.



# SOV Import Error (Contractor)

- ▶ Change the spelling of the Subcontractor/Supplier name to match the record exactly
- ▶ **Save the Excel file with a new name**
  - **Do not** use the same name as the file you saved during the [previous section](#)
  - ▶ If you choose the same name, the next step will not work properly

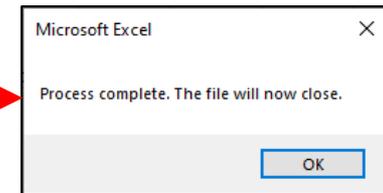


# SOV Import Error (Contractor)

- ▶ Click “Prepare Interface File”
- ▶ Import the new CSV file into the Contract SOV Details Tab (follow the instructions again beginning with the [Import Spreadsheet](#) slide

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Sup
			\$9,500.00	
CE-00-00	Construction Execution Summary			
CE-01-00	General Requirements			
CE-01-BE	General Requirements Budget			
CE-01-IN	CE Insurance			
CE-01-SB	CE Surety Bonds			
CE-01-SC	CE Scheduling Services			
CE-01-PF	CE Partnering Facilitation			
CE-01-MBL	CE Mobilization Labr	Sample Description	\$3,000.00	
CE-01-MBM	CE Mobilization Matl			
CE-01-TFI	CE Temporary Facilities Labr			

This box will appear indicating the file preparation is complete.



# PC Review Step

- ▶ Project Coordinator
  - ▶ After the Contract SOV has been approved by Associate, the PC performs one of the following Workflow Actions:
    - ▶ **Accept:** Forwards the SOV to the PM for Approval
    - ▶ **Return for Clarification:** Returns the SOV to the Contractor for revisions

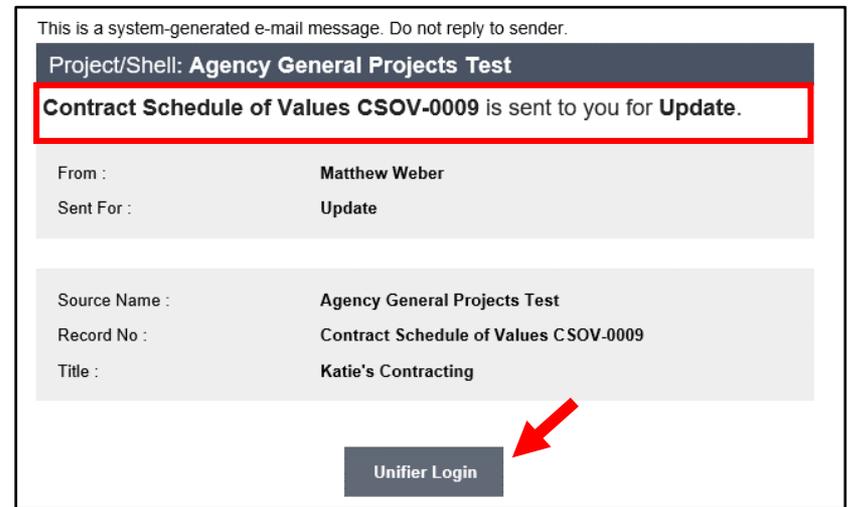
## Update Step (Contractor)

If Project Coordinator returns the SOV for clarification:

- ▶ Contractor: Provides clarifications or revisions to the SOV record and resubmits it for another review
  - ▶ Review the Contract SOV information
  - ▶ Make corrections or Add Attachments as necessary

# Update Step (Contractor)

- ▶ Contractor receives an Email
- ▶ Click on the “Unifier Login” button to access the task



# Update Step (Contractor)

- ▶ Click **Accept** to begin working on the record

The screenshot shows a web browser window with the title 'Contract Schedule of Values - Katie's Contracting - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/open/ucsov/2152/0/0?srcid=2152&model=ucsov&fromcosting=1&project\_id=1003&nfl=0&...'. The page title is 'Contract Schedule of Values'. Below the title, there are two tabs: 'General' (selected) and 'Contracts SOV Details'. A red circle highlights the 'Accept' button in the top right corner, with a red arrow pointing to it. The 'Accept' button is next to a 'Decline' button and a menu icon. The main content area is divided into two sections: 'Task Details' and 'General'. The 'Task Details' section has three fields: 'From' (Matthew Weber), 'To' (Matthew Weber), and 'Sent For' (Update). The 'General' section has four fields: 'Organization' (OAKS CI Test), 'Record Number' (CSOV-0009), 'Project Number' (OCI-080001), and 'Creator' (Matthew Weber). On the right side, there is an 'Attachments' panel with a 'Name' column and a 'Clear Browsing' button. The 'Attachments' panel shows two items: 'Unpublished Attachments' and 'Training Descrip'. The 'Total: 2' is displayed at the bottom of the attachments panel.

# Update Step (Contractor)

- ▶ To make changes to Line Items, open the Contracts SOV Details tab
- ▶ Individual Line Items cannot be modified. Instead follow these steps:
  - a) Click the gear icon next to the line you wish to change
  - b) Click **Copy**

Contract Schedule of Values - Katie's Contracting - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2788316/undefined/undefined?\_uref=uuu206688028t1

Contract Schedule of Values

General **Contracts SOV Details**

View Currency Transaction Currency

No.	WBS Code	Code Name	Short Description
004	CE-FC-13M	Specialties Matl	Specialty Material
	CE-FC-10L	Specialties Labr	Specialty Labor
	CE-FC-03M	Concrete Matl	Concrete Material (EDGE)
	CE-FC-03L	Concrete Labr	Concrete Labor (EDGE)

Total: 4 Total Amount 62,500.00

Line Item Details

WBS Code  
CE-FC-13M

Code Name  
Specialties Matl

Short Description  
Specialty Material

EDGE Certified Prime Contractor?  
Yes

# Update Step (Contractor)

- c) Make changes to the copied Line Item in the right pane
- d) Click **Save**

The screenshot displays the 'Contract Schedule of Values' interface. On the left, a table lists four line items. On the right, the 'Line Item Details' pane is open, showing the details for the selected item (No. 004). A red box highlights the 'Line Item Details' pane, and a red circle highlights the 'Save' button at the bottom.

No.	WBS Code	Code Name	Short Description
004	CE-FC-13M	Specialties Matl	Specialty Material
003	CE-FC-10L	Specialties Labr	Specialty Labor
002	CE-FC-03M	Concrete Matl	Concrete Material (EDGE)
001	CE-FC-03L	Concrete Labr	Concrete Labor (EDGE)

**Line Item Details (No. 004):**

- WBS Code: CE-FC-13M
- Code Name: Specialties Matl
- Short Description: Specialty Material
- EDGE Certified Prime Contractor?: Yes
- Amount (\$): 15,500.00
- Subcontractor/Supplier: Type a Subcontractor/Supplier...
- Subcontractor/Supplier: [Empty field]
- EDGE Certified?: [Empty field]

Total: 4 | Total Amount: 62,500.00

Buttons: Cancel, **Save**, Save & Add New

d

# Update Step (Contractor)

- ▶ The new Line Item will appear in the left pane
- c) Click the gear next to the original line item
- d) Click **Remove**

Contract Schedule of Values - Katie's Contracting - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2788316/undefined/undefined?\_\_uref=uuu206688028t1

### Contract Schedule of Values

Send Save

General **Contracts SOV Details**

Add Actions

View Currency Transaction Currency

No.	WBS Code	Code Name	Short Description
005	CE-FC-13M	Specialties Matl	Specialty Material
004	CE-FC-13M	Specialties Matl	Specialty Material
Copy	CE-FC-10L	Specialties Labr	Specialty Labor
Remove	CE-FC-03M	Concrete Matl	Concrete Material (EDGE)
Add to Group	CE-FC-03L	Concrete Labr	Concrete Labor (EDGE)

Total: 5 Total Amount 78,000.00

#### Line Item Details

Attachments Linke

WBS Code  
CE-FC-13M

Code Name  
Specialties Matl

Short Description  
Specialty Material

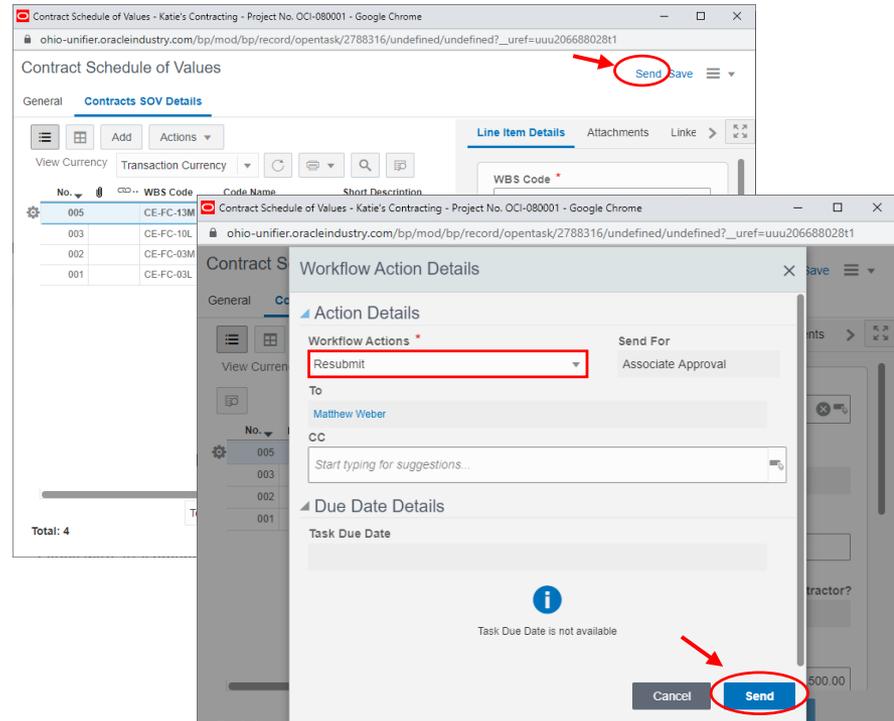
EDGE Certified Prime Contractor?  
Yes

Amount (\$)  
15,500.00

Subcontractor/Supplier

# Update Step (Contractor)

- ▶ When all necessary changes have been made, click **Send**
- ▶ Verify Workflow Action: **Resubmit**
- ▶ Click **Send**



# PC Review Step

- ▶ Project Coordinator
  - ▶ PC will take the following actions
    - ▶ **Accept:** Forwards the SOV to the PM for Approval
    - ▶ **Return for Clarification:** Returns the SOV to the Contractor for revisions

# PM Approval Step

- ▶ Project Manager
  - ▶ Performs one of the following Workflow Actions:
    - ▶ **Approve:** Approves the record
    - ▶ **Return for Clarification:** Returns the record for clarification, the submittal review and approval process is repeated

Once PM approves SOV, the PC will send the Contract record to the End step



# Change Orders

## Workflow Processes

# DocuSign Enabled Record

- ▶ The Change Order record workflows now utilize DocuSign, which enables electronic signature of change orders. These include:
  - ▶ Proposal Request
  - ▶ Request for Change Order
  - ▶ Change Directive
- ▶ Users who are sent a Change Order for signature via DocuSign do not need a separate account to sign the document. However, it is recommended. You can create a free DocuSign account at [docusign.net](https://docusign.net)
- ▶ For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website

# Change Order – Proposal Request

\*DocuSign Enabled

## Step 1

### Proposal Creation

- Project Manager creates proposal request, attaches supporting documents
- Submit to: Contractor

## Step 2

### Contractor

- Create proposal
- Plug in cost information in lower form.
- Reference lines ONLY when deducting money from the SOV
- Attach documents as necessary
- Submit to: PM Review

## Step 3

### PM Review

Project Manager review record

Submit to: PC for DocuSign

## Step 4

### Project Coordinator

- Enter current contract completion date
- Send to Contractor via DocuSign

Submit to: Contractor via DocuSign

# Change Order – Proposal Request

\*DocuSign Enabled

## • Step 6

- Contractor
- Review and Sign via DocuSign
- Sent to: **OFCC Approval** via DocuSign

## Step 7

- **OFCC Review**
  - Appropriate OFCC Staff reviews and signs via DocuSign
- Sent to: **Project Coordinator** via DocuSign

## Step 8

- **Project Coordinator**
  - Finish record in OAKS CI
  - Attach DocuSign Documents
- Submit to: **END**

# Critical Notes about Change Orders

# Important Note

**There are two critical issues we would like to remind everyone of during the creation of a deduct Change Order:**

Any Change Order which contains lines that will deduct money from your contractor's contract WILL lock the Contract SOV, this means, they will not have the ability to create an Application for Payment until the modification has been Approved or Withdrawn. We have found that best practice is to submit the monthly pay request prior to creating the change order with the deduct lines.

Another issue that seems to slow down the approval of the deduct change order occurs when lines from the SOV are not referenced. When creating the change order, the contractor must ensure that they are referencing the line they wish to deduct from. **EVERYONE reviewing** the change order must review the lower form and ensure that all **deduct lines** reference a line from the SOV.

For walk thru instructions on how to create a change order please go to the OFCC Website under Resources and Training.

# Reference a Line when Deducting

When creating a change order with a deduct lines you must ALWAYS reference the line from the SOV:

Line Item - Google Chrome  
https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=for

Change Order Line Item:

General

Reference:

WBS Code:

Code Name:

Short Description:

Amount (\$):

EDGE Certified Prime Contractor?:

Subcontractor/Supplier:

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

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

Click Select next to the Reference Line

Note: When deducting money, you must reference a line

Line Item - Google Chrome  
https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=for

Change Order Line Item:

General

Reference:

WBS Code:

Code Name:

Short Description:

Amount (\$):

EDGE Certified Prime Contractor?:

Subcontractor/Supplier:

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

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

# Reviewing the Line Items

When reviewing a change order which contains deduct lines, you must look for the referenced SOV line, it should NEVER be zero:

The screenshot displays a web application window titled "Contract Modification - PR#03-Visual Display Boards - Project No. SFC-130315.32 - Windows Internet Explorer". The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with buttons for Save, Spelling, Add Attachment, SOV, and Close Window. The main content area is divided into sections: "General", "Task Details", and "Line Item List".

The "General" section contains the following information:

- Project Number: SFC-130315.32
- Record Number: CM-0009
- Project Name: Prairie Lincoln - New Elementary
- Creator: Haley Kurmas
- Organization Name: South-Western CSD
- Creation Date: 06/02/2015 08:23 AM Local (GMT-5)
- Facility Name: Prairie Lincoln - New Elementary
- Status: Approved
- Title: PR#03-Visual Display Boards

The "Task Details" section shows a message: "Record has been closed. (Click here to view process details)".

The "Line Item List" section shows a table with the following data:

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Sup
001	194	CE-C10-10M	CE Interior Const Specialty	Visual Display Surfaces - Material	-417.00	0	

A red box highlights the "Reference" field with the value "194", and a red arrow points to it from a box labeled "Correct".

At the bottom of the window, there are buttons for Grid, Find, and a "Total Amount: \$ -417.00" display. The footer includes links for Attachments (2), Linked Records (0), General Comments, and Linked Mail (0).

# Job Aids

- ▶ For additional reference materials visit our website [ofcc.ohio.gov](http://ofcc.ohio.gov)
- ▶ Click: OAKS CI -> Agency/Higher Ed Training

The screenshot shows the OFCC website interface. The main navigation bar includes 'About', 'Documents', 'Services / Programs', 'News / Events', 'Opportunities', 'OAKS CI', 'Resources', and 'Gallery'. The 'OAKS CI' link is circled in red. Below the navigation bar, the 'OAKS Capital Improvements (OAKS CI)' page is displayed. A red box highlights the 'Agency/Higher Ed' section, which contains two green buttons: 'Agency/Higher Ed User Login' and 'Agency/Higher Ed Training'. A red arrow points from the 'Agency/Higher Ed Training' button to a detailed view of the 'OAKS CI Training & Job Aids (Agency/Higher Education)' page. This page features a table of training materials with columns for 'Title', 'Recorded Presentation', and 'Job Aid'.

Title	Recorded Presentation	Job Aid
Introduction to OAKS CI		
Document Manager		
Custom Prints		
Discussion Groups		
Subcontractor / Supplier Declaration Process		
Meeting Minutes		
Action Items		
DocuSign		

# Questions?

OAKS CI Support Desk Contact Info:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211