



K12

Design Phase

OAKS CI Training and Support

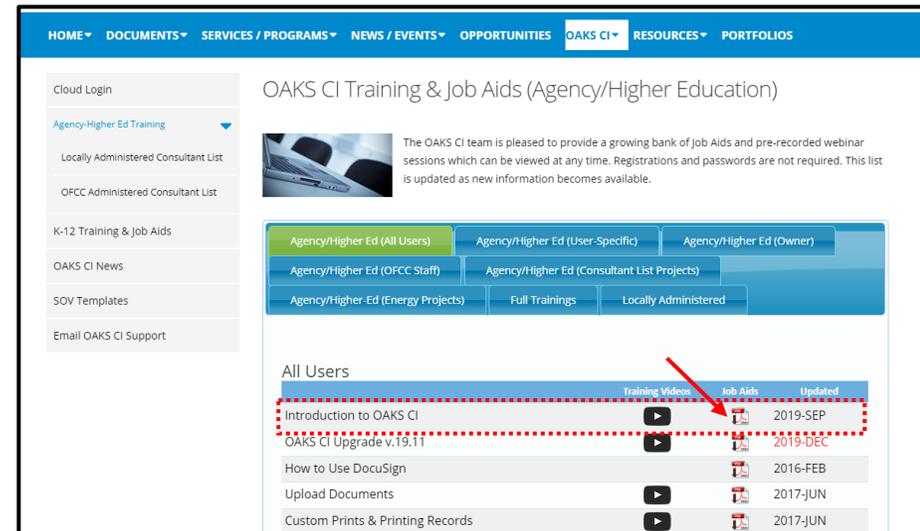
To view additional job aids and training materials for OAKS CI:

1. Navigate to ofcc.ohio.gov
2. Mouse over the OAKS CI tab
3. Click K-12 Training & Job Aids



Before proceeding through this training document, it is recommended you view the [Introduction to OAKS CI](#) job aid.

For additional help, please contact the OAKS CI Support Desk - oaksci@ofcc.ohio.gov



Navigation

At the bottom-right of each slide is a text link that lists the section and subsection of your location in the document. The example to the right is taken from the Create step of the Professional Services Agreement. Clicking the link will take you to the beginning of the Professional Services Agreement section.



The Home icon will always take you directly back to the table of contents.

Some slides describe a workflow with boxes representing each step. On these slides you can click the boxes to navigate directly to that step in the job aid.



You will also see text links that will either take you to another slide, or directly to another document. The [Topics](#) slide contains links to each major section.



Topics

Project Process

Project Creation

Funds

Vendor Record Creation

New User Access Request

Contracts

Purchase Orders

Subcontractor/Supplier Declaration

Contract Schedule of Values (SOV)

Application for Payment

Design Review

Document Manager

Adding Comments

Questions

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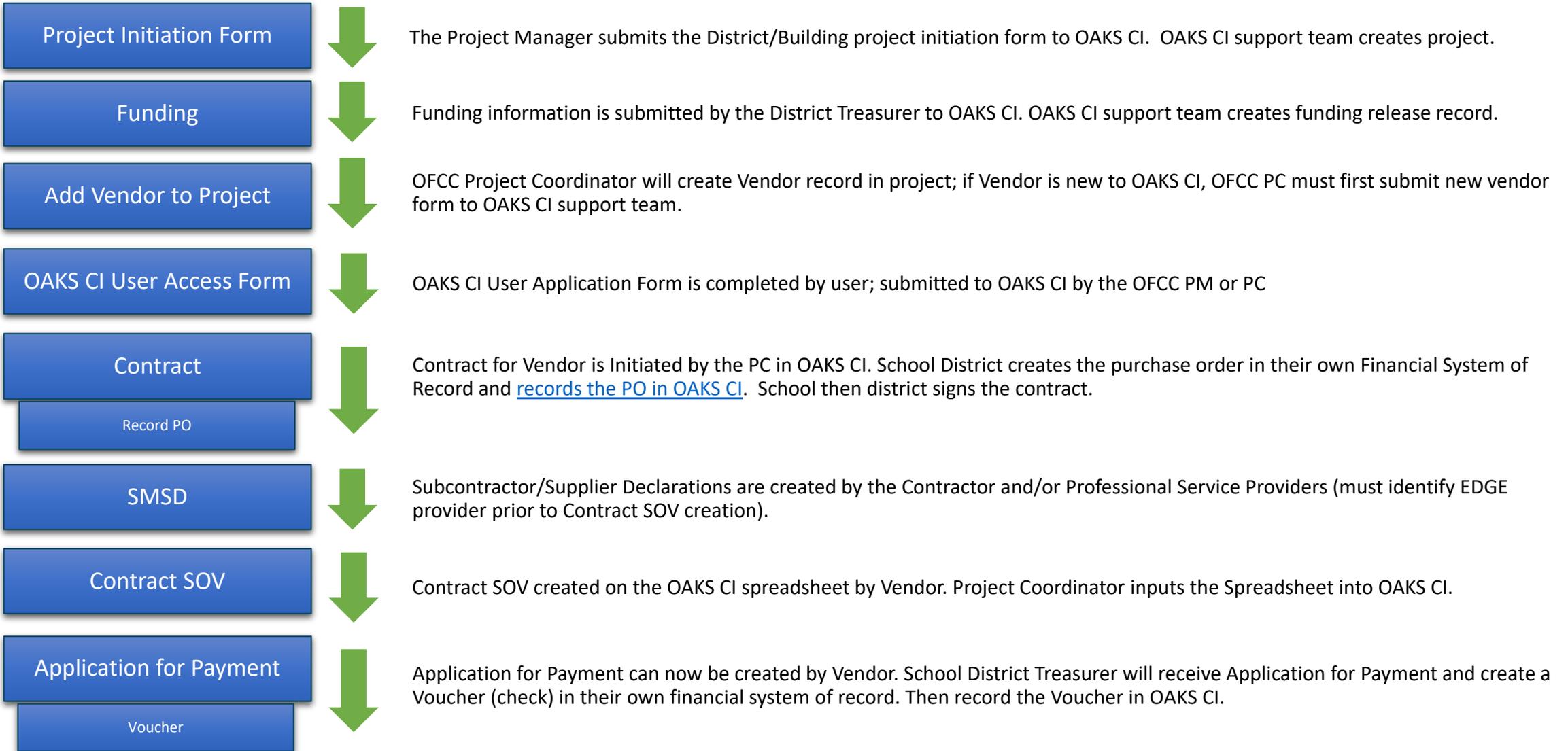
233

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



K12 OAKS CI Basic Project Process

Click the blue buttons below to navigate directly to any section

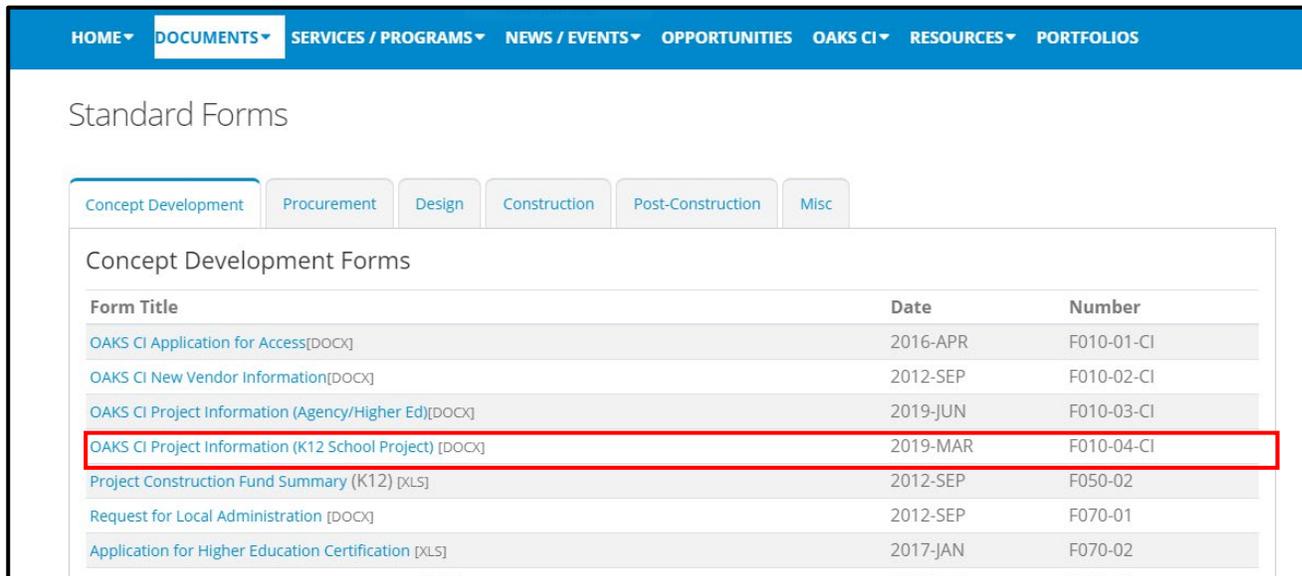


Project Creation



Project Initiation

- ▶ Prior to completing any work in OAKS CI, the OAKS CI Project (Initiation) Information form must be completed and submitted to oaksci@ofcc.ohio.gov
- ▶ The form can be located at ofcc.ohio.gov under:
 - ▶ Documents tab → Standard Forms
 - ▶ Concept Development → [OAKS CI Project Information \(K12 School Project\)](#)



Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Concept Development Forms

Form Title	Date	Number
OAKS CI Application for Access[DOCX]	2016-APR	F010-01-CI
OAKS CI New Vendor Information[DOCX]	2012-SEP	F010-02-CI
OAKS CI Project Information (Agency/Higher Ed)[DOCX]	2019-JUN	F010-03-CI
OAKS CI Project Information (K12 School Project) [DOCX]	2019-MAR	F010-04-CI
Project Construction Fund Summary (K12) [XLS]	2012-SEP	F050-02
Request for Local Administration [DOCX]	2012-SEP	F070-01
Application for Higher Education Certification [XLS]	2017-JAN	F070-02



Funds



Create Vendor Record

(Project Coordinator)



Create Vendor Record (PC)

- ▶ After the project has been created and users have been added, you are now ready to create the Vendor record in the project. This must be done prior to the creation of the Professional Services Contract.



Create Vendor Record (PC)

▶ 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...> and a search bar containing "DPS-". A dropdown menu is open, displaying a table of project records. The table has columns for Name, Number, and Location. A red arrow points to the search bar, and another red arrow points to the first row of the table. A red box highlights a plus sign in the top right corner of the dropdown menu.

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
ODPS 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



Create Vendor Record (PC)

► Once in your project:

- a. Click Data Manager
- b. Click Project Vendors K12

The image displays two screenshots of the Oracle Primavera Unifier (Development) interface. The top screenshot shows the navigation menu with 'Data Manager' highlighted, indicated by a red arrow and a blue circle labeled 'a'. The bottom screenshot shows the 'Project Vendors K12' menu item highlighted, indicated by a red arrow and a blue circle labeled 'b'. Below the menu, a table of vendor records is visible.

Vendor Name	Contact	School Distr
Amazing Architectural...		
CTL Engineering		
Dynamix Engineering		
H. R. Gray		



Create Vendor Record (PC)

- c. Click **Create** to open a new record

Complete all fields

- d. Click Address tab to update Vendor address

- e. Click **Submit**

ORACLE Primavera Unifier (Development)

Company Work... OAKS CI Traini... OAKS CI Distric... Oak Hills Local ...

OAKS CI District Training... Alerts Tasks E-Signatures Drafts Mailbox Information Cost Manager Data Manager Budget Amendme LFI Budget K12 Project Agreemen Project Milestone Project Vendors Document Manage Logs Reports

Project Vendors K12

+ Create Actions View All Records

Vendor Name Contact School Distr

Amazing Architectural...

Create New Project Vendors K12 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/upvk/1084?__uref=uuu505365360t3

Create New Project Vendors K12

General Address

Submit Save

Attachments Comment

Information No Attachments

Contact and Insurance information can be stored here. Copies of insurance verification should be attached to the record using Add Attachment.

Project Number SFC-080001 Record Number

Project Name OAKS CI District Training Project 1 Creator Matthew Weber

School District OAKS CI District Training Project - 1 Creation Date

Vendor * OAKS Plumbing Status * Active

Vendor Name OAKS Plumbing President / CEO John Tree



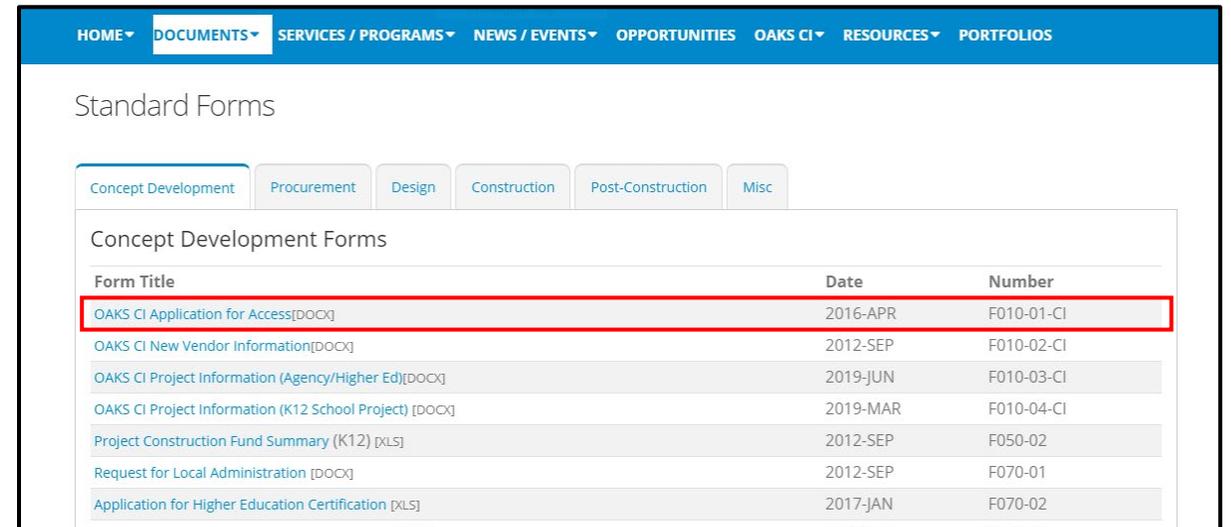
New User Access



New User Access

- ▶ Once the project has been created in OAKS CI, please submit user access forms for any vendors who will be utilizing the system. The form must be completed and submitted to oaksci@ofcc.ohio.gov after approval by the Project Coordinator or Project Manager.

- ▶ The form can be located at ofcc.ohio.gov under:
 - ▶ Documents tab → Standard Forms
 - ▶ Concept Development → [OAKS CI Application for Access](#)



Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Concept Development Forms

Form Title	Date	Number
OAKS CI Application for Access[DOCX]	2016-APR	F010-01-CI
OAKS CI New Vendor Information[DOCX]	2012-SEP	F010-02-CI
OAKS CI Project Information (Agency/Higher Ed)[DOCX]	2019-JUN	F010-03-CI
OAKS CI Project Information (K12 School Project) [DOCX]	2019-MAR	F010-04-CI
Project Construction Fund Summary (K12) [XLS]	2012-SEP	F050-02
Request for Local Administration [DOCX]	2012-SEP	F070-01
Application for Higher Education Certification [XLS]	2017-JAN	F070-02



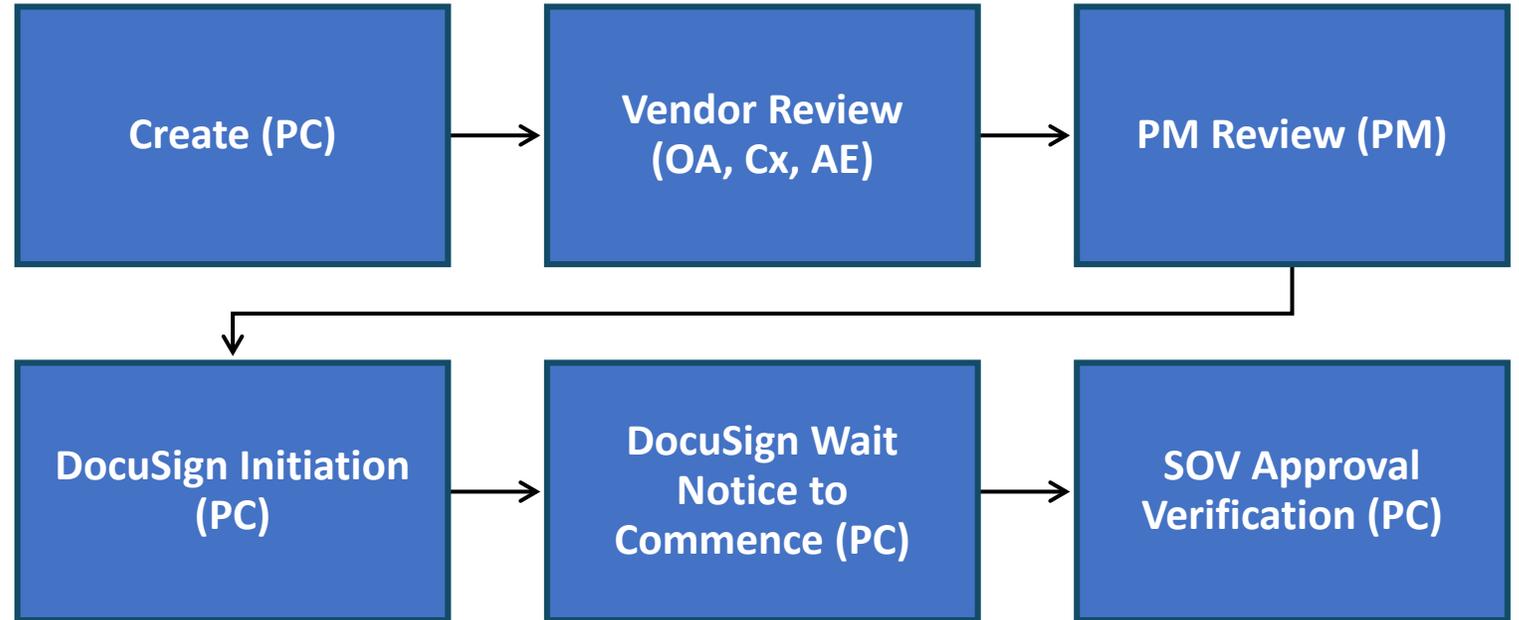
Contracts



Contracts

- ▶ Workflow Steps

Click the boxes to navigate directly to any section



Contract K12 - Creation (PC)

Contract Creation (PC)

▶ 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...> and the page title "Service Requests". The browser's address bar and tabs are visible. The main content area displays a search results table with the following data:

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
ODPS 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

Annotations on the screenshot include: a blue circle 'a' around the search bar, a blue circle 'b' around the search results table, and a blue circle 'c' around the search bar. A red arrow points from the search bar to the table, and another red arrow points from the table to the search bar. A red box highlights the search bar's search icon.

Contract Creation (PC)

- ▶ Once in your project:
 - ▶ Click **Logs** -> **Contract K12**
 - ▶ Click **Create**

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'Company Work...', 'OAKS CI Traini...', and 'OAKS'. The left sidebar contains a list of menu items: Alerts, Tasks, E-Signatures, Drafts, Mailbox, Information, Cost Manager, Data Manager, Document Manager, Logs, Action Items K12, Applications for Pay..., Closeout - Profession..., Contract K12, Contract Modification..., Contract Schedule of..., Field Reports K12, Fund Release K12, Fund Transfers K12, Meeting Minutes K12, and Miscellaneous Chang... The 'Logs' menu item is circled in red, and a red arrow points to the 'Contract K12' option. The main content area displays 'Contract K12' with a '+ Create' button circled in red. Below the button is a table with columns for 'Contract No.' and a list of contract entries.

Contract No.
SFC-080001-02-03 T
SFC-080001-02-02 T
SFC-080001-02-02 T
SFC-080001-02-02 T
SFC-080001-02-01 T
Morris 001
Morris 001
District Training Test
03 District Training

Total: 10

Complete General Section (PC)

- a) Complete the General Section
 - ▶ All required fields are marked with a Red *
- b) Enter Contract Scope
- c) Scroll down to the next section in the General Tab

Create New Contract K12 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/uck/1084/5748?__uref=uuu771224498t3

Create New Contract K12 Send Save

General WBS Detail

General

Project Number: SFC-080001

Record Number: [Empty]

Project Name: OAKS CI District Training Project 1

Creator: Matthew Weber

Organization Name: OAKS CI District Training Project - 1

Creation Date: [Empty]

Facility Name: [Empty]

Status: [Empty]

Title *: SFC 080001 - 2

Contract Type *: Architect_Engineer

Contract No. *: 080001-2

PS Acquisition Reference: Type a Vendor Name...

Selection Method *: Competitive Selection

Scope

Contract Scope *: Commissioning Services

Complete Contractor Information Section (PC)

- ▶ Complete the **Contractor Information** section
 - d) Click the Select button next to Contractor Name
 - e) Choose the appropriate Vendor from the list
 - f) Click **Select**
 - g) Select Yes/No to complete Contractor Information fields
- ▶ Scroll down to the next section in the General tab

Annotations:

- d) Select button next to Contractor Name
- e) Vendor selection in the list
- f) Select button at the bottom of the vendor list
- g) Confirmation fields (Drug Free Work Place Verified?, EDGE Certified Prime?, Clean Search of State Auditors Database?, Joint Venture)

Vendor Name	School District Ven...	Status
Amazing Architectural...		Active
CTL Engineering		Active
Dynamix Engineering		Active
H. R. Gray		Active
OAKS Plumbing		Active

Total: 5

Buttons: Cancel, Select

EDGE Waiver and Required Documents (PC)

- h) Complete the fields in the EDGE Waiver and Required Documents sections
- i) Scroll down to the next section in the General tab

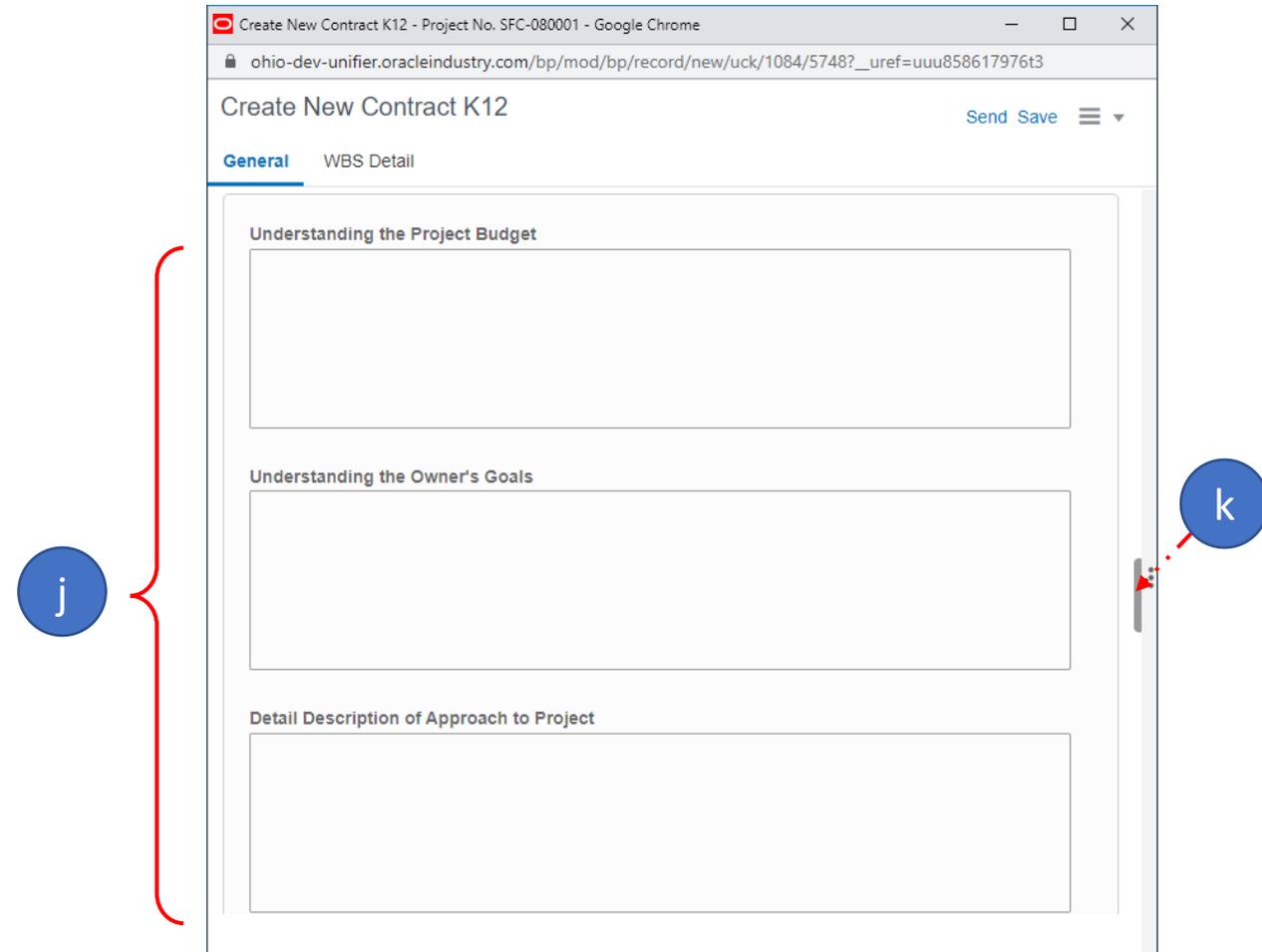
The screenshot shows a web browser window with the title 'Create New Contract K12 - Project No. SFC-080001 - Google Chrome'. The URL is 'ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/uck/1084/5748?_uref=uuu771224498t3'. The page title is 'Create New Contract K12' with 'Send Save' and a menu icon. There are two tabs: 'General' (selected) and 'WBS Detail'. The form contains several sections:

- EDGE Waiver:** A dropdown menu set to 'No'.
- Award Date:** A date field set to '05/01/2020' with a calendar icon.
- EDGE Goal Percent:** A text input field containing '5'.
- EDGE Commitment (%):** A text input field containing '13'.
- Minimum Construction Admin Hours/Week:** A text input field containing '0'.
- Required Documents:** A section with a note: 'NOTE: A checkmark indicates a submission of this document is required. Submissions can be uploaded to the document manager by either the vendor or coordinator and then attached by the coordinator.' It includes four checked checkboxes: 'Ohio Worker's Compensation Certificate', 'Certificate of Insurance', 'Proof of Licensing', and 'EEO Requirement'. Each checkbox has a corresponding text input field to its right.

Annotations: A blue circle with the letter 'h' is placed to the left of the form, with a red bracket pointing to the 'EDGE Waiver' and 'Required Documents' sections. A blue circle with the letter 'i' is placed to the right of the form, with a red arrow pointing to the vertical scrollbar.

Enter Requirements Information (PC)

- j) Enter project information or attach supporting documentation
- k) Scroll down to the Fee Summary section



Funding and Fee Summary (PC)

- l) Complete the required fields in the Funding Summary section
- m) For each category in the fee summary block, enter the negotiated amounts
- n) The amount entered from each category will be added to the **Total Contract Amount** field at the bottom of the block
- o) Next you will add a Line Item to ensure the **Difference** is \$0.00

The screenshot shows a web browser window titled "Create New Contract K12 - Project No. SFC-080001 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/uck/1084/5748?__uref=uuu771224498t3". The page title is "Create New Contract K12" with "Send Save" and a menu icon. The "General" tab is selected, and "WBS Detail" is visible. The "Funding Summary" section is expanded, showing "Enter the Co-Funded and LFI Amounts for this Contract." with two input fields: "Co-Funded Amount (\$)" with value 250,000.00 and "LFI Amount (\$)" with value 100,000.00. A blue circle 'l' is next to this section. Below it, a red box highlights the "Fee Summary" section with four input fields: "Direct Personnel Expense (\$)" (250,000.00), "Basic Services Amount (\$)" (250,000.00), "Additional Services Amount (\$)" (250,000.00), and "Reimbursable Cost Amount (\$)" (250,000.00). A blue circle 'm' is next to this section. At the bottom right, a summary table shows: "Total Contract Amount" (1,000,000.00), "Line Item Total (\$)" (0.00), and "Difference (\$)" (1,000,000.00). A blue circle 'n' points to the "Difference (\$)" field, which is circled in red. A blue circle 'o' is also present on the right side of the form.

Category	Amount (\$)
Co-Funded Amount	250,000.00
LFI Amount	100,000.00
Direct Personnel Expense	250,000.00
Basic Services Amount	250,000.00
Additional Services Amount	250,000.00
Reimbursable Cost Amount	250,000.00
Total Contract Amount	1,000,000.00
Line Item Total	0.00
Difference	1,000,000.00

Add Line Item (PC)

- p) Click the **WBS Detail** tab
- q) Click **Add**
- r) Click the Select button next to the WBS Code field
- s) Choose the WBS code AE-AE-SV, CM-CM-SV, or Cx-Cx-SV
- t) Click **Select**

(continued on next page)

The screenshot shows the 'Create New Contract K12' application interface. The 'WBS Detail' tab is active. The 'Add' button is circled in red. The 'CBS Picker' dialog box is open, showing a list of CBS Codes and Items. The 'AE-AE-BE' code is selected, and the 'Select' button is circled in red. The 'Line Item Details' panel is also visible, showing the 'WBS Code' field with a search icon circled in red.

CBS Code	CBS Item
▶ PA-00-00	Property Acquisition Summary
▶ RM-00-00	Relocation and Moving Summary
▶ OR-00-00	Owner Expense Summary
▲ AE-00-00	Professional Design Summary
▲ AE-AE-00	Professional Design General
AE-AE-BE	Professional Design Budget
▶ AE-BS-00	AE Basic Services
▶ AE-AS-00	AE Additional Services
▶ AE-RE-00	AE Reimbursable Expense
▶ CM-00-00	Construction Management Summary

Add Line Item (PC)

- w) Enter a **Short Description** and the **Amount (\$)**
- x) Click **Save**

The **Line Item** will display to the left

The screenshot displays the 'Create New Contract K12' interface. The main table shows one line item:

No.	WBS Code	Code Name	Short Description
001	AE-AE-BE	Professional Design Budget	PS Design Budget

The 'Line Item Details' panel on the right contains the following fields:

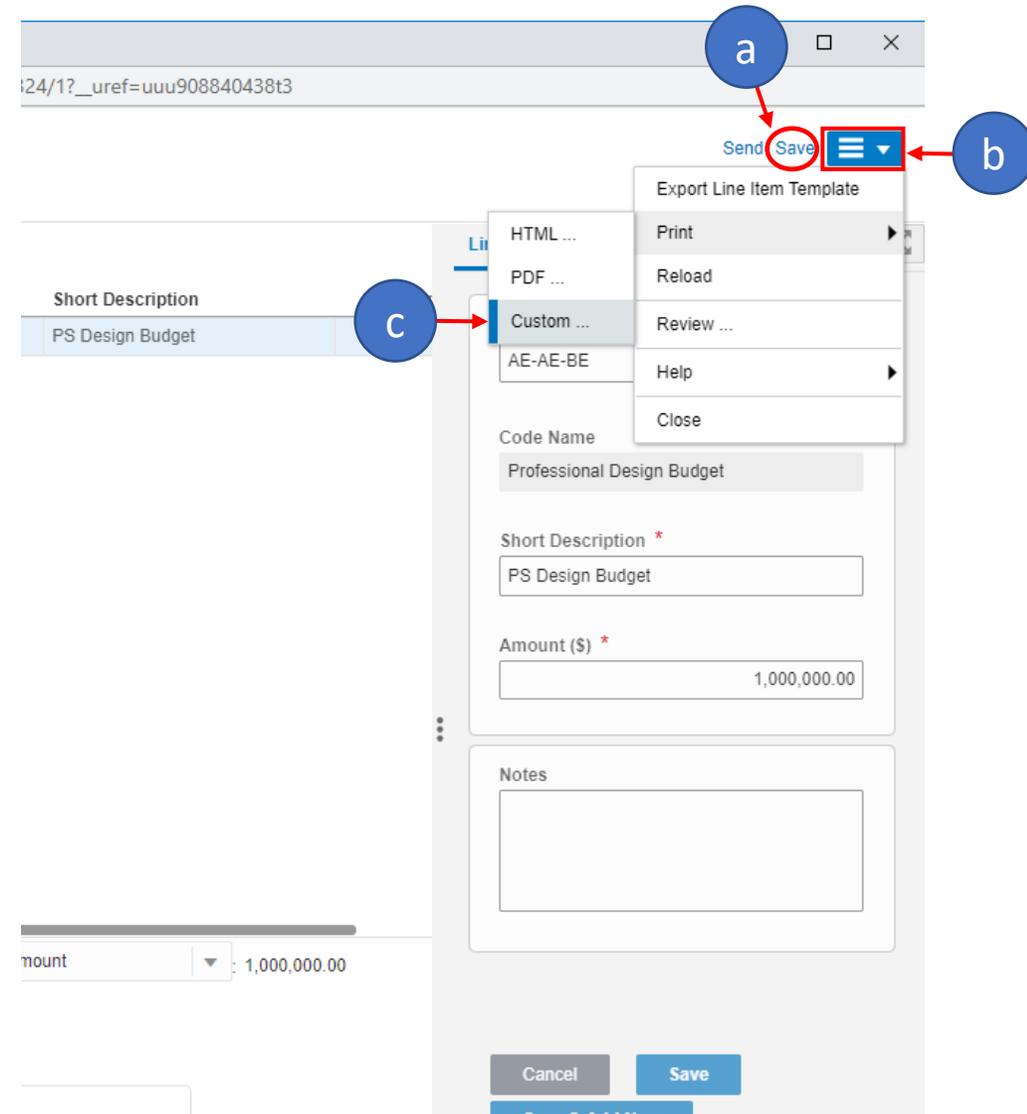
- WBS Code: AE-AE-BE
- Code Name: Professional Design Budget
- Short Description: PS Design Budget
- Amount (\$): 1,000,000.00
- Notes: (empty text area)

At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Save & Add New'. The 'Save' button is circled in red, with a blue circle containing an 'X' pointing to it. A blue circle containing a 'W' is positioned to the left of the 'Short Description' and 'Amount (\$)' fields, with a red bracket indicating these two fields.

Create Agreement Document (PC)

- ▶ Next create the Agreement Document, then upload and attach it to the record

- Click **Save** in the top right corner
- Click the blue **Menu** button
- Select **Print** -> **Custom**



Create Agreement Document (PC)

- d) Select the appropriate form based on the type of agreement
- e) Click **OK**

Custom Format Print - Google Chrome

ohio-unifier.oracleindustry.com/bp/studio/bp/selectPrintFile?bp_type=u&k&...

Select a custom print template

Title ▲

- AE_Agreement_Form_K12_C110-03-2019-OCT_W7
- CMA Agreement K12_C120-03_2019-OCT_W7
- CMR_Agreement_Form_K12_M170-00_52_23_2019-OCT_W7
- Consultant_Agreement_K12_C130-03_2019-OCT_W7
- DB_Agreement_K12_M180-00-52-53_2019-OCT_W7
- K-12 CMR Notice to Commence Preconstruction Services_2020 MAR_W7
- K-12 CMR Notice to Proceed 2020 MAR_W7
- K-12 GC Notice to Proceed_2020_MAR_W7
- K-12 GC Request for Bidder Qualifications

Select a template and format to print

Template: -Select- ▼

Format: -Select- ▼

Select options for Workflow Progress

All Steps

Visited Steps

Sort by: Completion Date ▼ Ascending ▼

OK Cancel

Upload and Attach Documents (PC)

The document will download to your computer and will appear at the bottom of the record

- ▶ Upload and attach this document to the record, as well as the technical proposal and submittals provided by the vendor

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/uck/1084/2955?_uref=uuu908840438t3

Create New Contract K12

General **WBS Detail**

No.	WBS Code	Code Name	Short Description
001	AE-AE-BE	Professional Design Budget	PS Design Budget

Line Item Details Attachments Linked Records

WBS Code *
AE-AE-BE

Code Name
Professional Design Budget

Short Description *
PS Design Budget

Amount (\$) *
1,000,000.00

Notes

Total Amount 1,000,000.00

Total: 1

K12+AE+Agreeme...doc

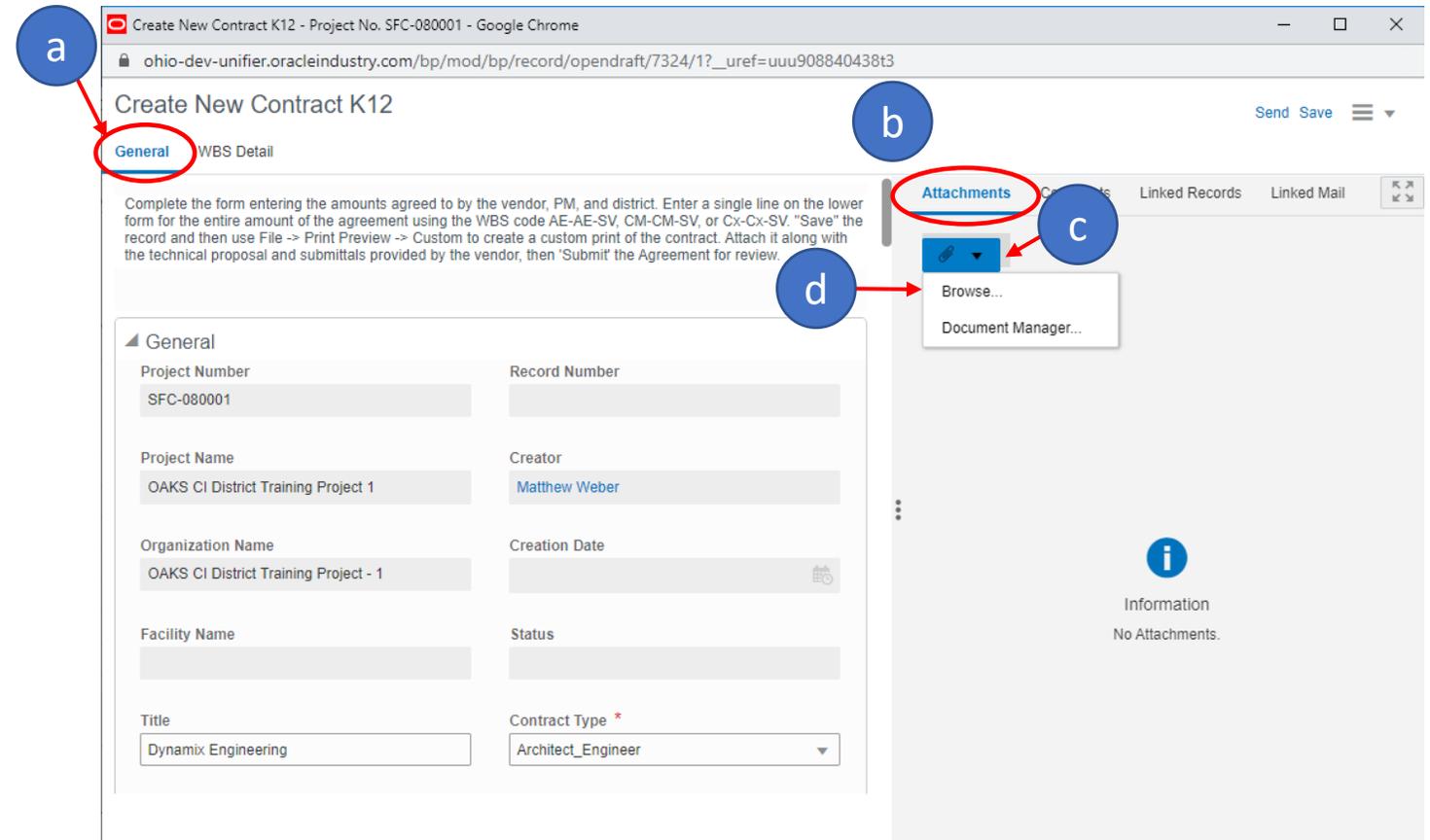
Cancel Save Save & Add New

Show all X

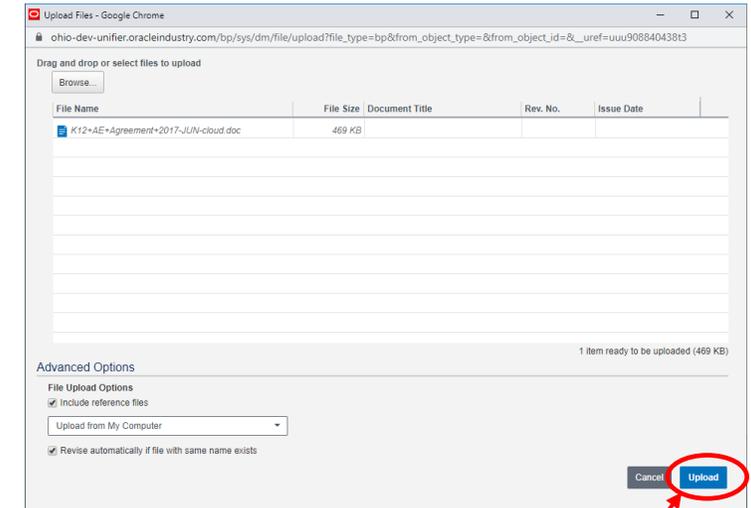
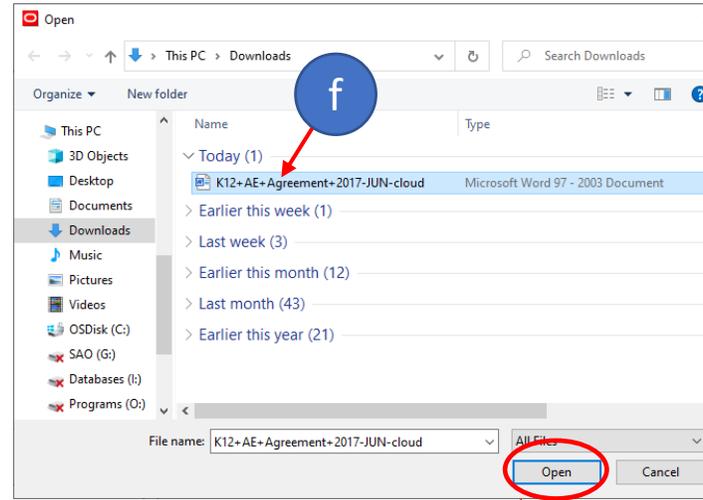
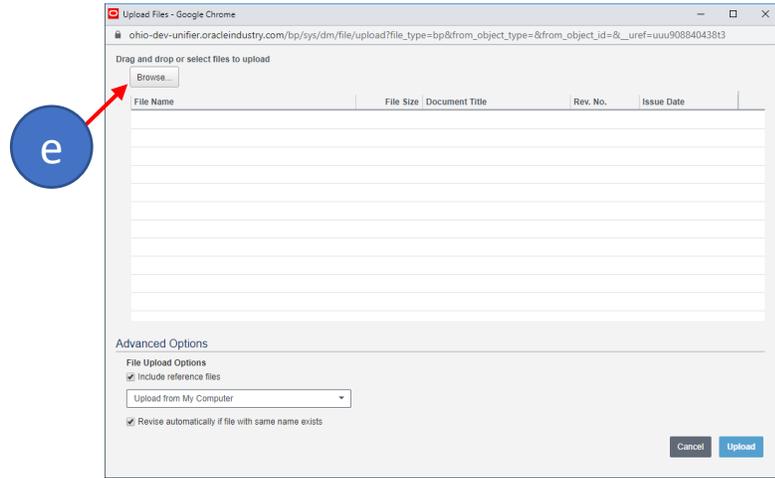
Upload and Attach Documents (PC)

- ▶ Upload and attach the Agreement to the record, as well as the Technical Proposal and Submittals provided by the vendor

- Return to the **General Tab**
- Select the **Attachments Tab**
- Click the **Upload Button**
- Select **Browse**



Upload and Attach Documents (PC)



A window will pop up to upload the files.

- e) Click Browse
- f) Select the file from your computer
- g) Click Open
- h) Click Upload

Send the Record (PC)

- ▶ The attached are displayed
- ▶ When the record is ready to move forward, click **Send**

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7324/1?__uref=uuu908840438t3

Create New Contract K12

[General](#) [WBS Detail](#)

Complete the form entering the amounts agreed to by the vendor, PM, and district. Enter a single line on the lower form for the entire amount of the agreement using the WBS code AE-AE-SV, CM-CM-SV, or Cx-Cx-SV. "Save" the record and then use File -> Print Preview -> Custom to create a custom print of the contract. Attach it along with the technical proposal and submittals provided by the vendor, then "Submit" the Agreement for review.

General

Project Number	Record Number
SFC-080001	
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project - 1	
Facility Name	Status
Title	Contract Type *
Dynamix Engineering	Architect_Engineer

Attachments | Comments | Linked Records | Linked Mail

	Name		Title
Unpublished Attachments			
<input checked="" type="checkbox"/>	K12+AE+Agreement+20...		
<input checked="" type="checkbox"/>	Submittal SFC-080001.pdf		
<input checked="" type="checkbox"/>	Technical Proposal SFC-...		

Total: 3

Send the Record (PC)

- ▶ Verify the Workflow Action:
Submit for Review
- ▶ Select or enter the Recipient
- ▶ Click **Send**
 - ▶ The record will move forward for **Vendor Review**

Create New Contract K12 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7330/1?_uref=uuu858617976t3#

Workflow Action Details

General WE

Complete the record and district. Enter the agreement SV. "Save" the record to create a custom proposal and send Agreement for

Workflow Actions *
Submit for Review

Send For
Vendor Review

To
Matthew Weber x

CC
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send

Contract K12 – Vendor Review (OA, Cx, A/E)

Receive Task (Vendor)

- ▶ Vendor 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 District Training Project 1

Contract K12 CON-013 is sent to you for Vendor Review.

From : **Matthew Weber**
Sent For : **Vendor Review**

Source Name : **OAKS CI District Training Project 1**
Record No : **Contract K12 CON-013**
Title : **SFC 080001 Test 2**

[Unifier Login](#)

Accept Task (Vendor)

- ▶ To begin work on the record, click **Accept**

Contract K12 - SFC 080001 Test 2 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208097?task_id=208097&parent_id=0&viewOnly=0&project_id=1084&mod...

Contract K12

[Accept](#) [Decline](#) ☰

General WBS Detail

Task Details

From
Matthew Weber

To
Matthew Weber

Sent For
Vendor Review

General

Project Number SFC-080001	Record Number CON-013
Project Name OAKS CI District Training Project 1	Creator Matthew Weber
Organization Name	Creation Date

Attachments

Published Attachments

	Name		
<input checked="" type="checkbox"/>	K12+AE+Agreement+20...		
<input checked="" type="checkbox"/>	Submittal SFC-080001.pdf		
<input checked="" type="checkbox"/>	Technical Proposal SFC-...		

Total: 3

Review Record (Vendor)

▶ Review each section in the **General Tab:**

- a) Review **Contractor Information** section
- b) Use the slider to scroll down to the next section

The screenshot shows a web application interface for reviewing a vendor record. The browser address bar indicates the URL is `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208097?task_id=208097&parent_id=0&viewOnly=0&project_id=1084&mod...`. The page title is "Contract K12" and the current tab is "General".

The "Contractor Information" section contains the following fields:

Contractor Name	Vendor Legal Name
CTL Engineering	
Federal Tax ID	Vendor Address 1
Vendor Contact	Vendor Address 2
Vendor Contact Phone	Vendor City
Vendor Contact Fax	Vendor State
	Ohio
Vendor Contact Email	Vendor ZIP
Drug Free Work Place Verified?	EDGE Certified Prime?
Yes	Yes
Clean Search of State Auditors Database?	Joint Venture
Yes	No

The "Attachments" section on the right shows a list of published attachments:

Name
Published Attachments
<input checked="" type="checkbox"/> K12+AE+Agreement+20...
<input checked="" type="checkbox"/> Submittal SFC-080001.pdf
<input checked="" type="checkbox"/> Technical Proposal SFC...

A red bracket labeled 'a' encompasses the Contractor Information section. A blue circle labeled 'b' is positioned over the Attachments section, with a red arrow pointing to the attachment list.

Review Record (Vendor)

- c) Review **EDGE Waiver** details
- d) Review **Required Documents** required for submission
- e) Continue to the next section

Contract K12 - SFC 080001 Test 2 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208097?task_id=208097&parent_id=0&viewOnly=0&project_id=1084&mod...

Contract K12 Send Save

General WBS Detail

EDGE Waiver **Award Date**

EDGE Goal Percent

EDGE Commitment (%) **Minimum Construction Admin Hours/Week**

Attachments Comments Linked Recr >

Published Attachments

Name
<input checked="" type="checkbox"/> K12+AE+Agreement+20...
<input checked="" type="checkbox"/> Submittal SFC-080001.pdf
<input type="checkbox"/> Technical Proposal SFC-...

NOTE: A checkmark indicates a submission of this document is require.

Ohio Worker's Compensation Certificate

Certificate of Insurance

Proof of Licensing

EEO Requirement

Total: 3

Review Record (Vendor)

- ▶ Review Funding Summary fields:

f) Co-Funded and LFI Amounts

g) Reimbursable Distributions

h) Total Contract Amount

Contract K12

General WBS Detail

Funding Summary

Enter the Co-Funded and LFI Amounts for this Contract.

Co-Funded Amount (\$)	0.00
LFI Amount (\$)	0.00
Direct Personnel Expense (\$)	250,000.00
Basic Services Amount (\$)	250,000.00
Additional Services Amount (\$)	250,000.00
Reimbursable Cost Amount (\$)	250,000.00
Total Contract Amount	1,000,000.00
Line Item Total (\$)	1,000,000.00
Difference (\$)	0.00

Attachments

Name
Published Attachments
K12+AE+Agreement+20...
Submittal SFC-080001.pdf
Technical Proposal SFC-...

Total: 3

Send Record (Vendor)

- ▶ Once the record is reviewed and is ready to move forward, click the **Send** button

The screenshot shows a web browser window with the URL: `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208097?task_id=208097&parent_id=0&viewonly=0&project_id=1084&mod...`

The page title is "Contract K12". The breadcrumb navigation shows "General" and "WBS Detail".

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

- Enter the Co-Funded and LFI Amounts for this Contract.
- Co-Funded Amount (\$): 0.00
- LFI Amount (\$): 0.00
- Direct Personnel Expense (\$): 250,000.00
- Basic Services Amount (\$): 250,000.00
- Additional Services Amount (\$): 250,000.00
- Reimbursable Cost Amount (\$): 250,000.00
- Total Contract Amount: 1,000,000.00
- Line Item Total (\$): 1,000,000.00
- Difference (\$): 0.00

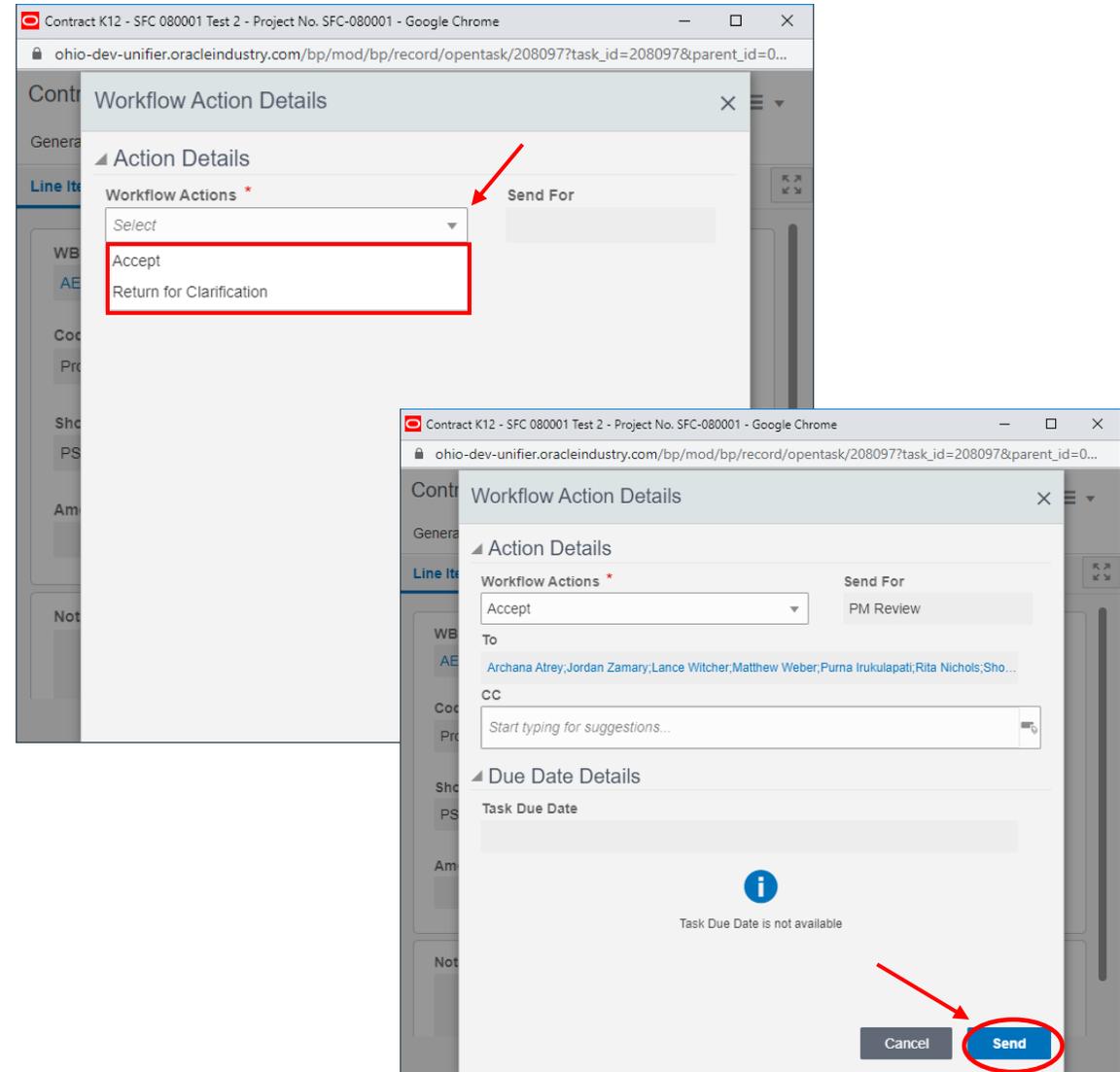
The right sidebar contains an "Attachments" section with a table of published attachments:

Name			
Published Attachments			
<input checked="" type="checkbox"/>	K12+AE+Agreement+20...		
<input checked="" type="checkbox"/>	Submittal SFC-080001.pdf		
<input checked="" type="checkbox"/>	Technical Proposal SFC...		

At the top right of the page, there is a "Send Save" button, which is circled in red. A red arrow points to this button from the top right of the browser window.

Send Record (Vendor)

- ▶ Verify the Workflow Action:
 - ▶ Select **Accept** if the record is ready to move forward to PM Review
 - ▶ Select **Return For Clarification** if the record needs to be sent for update
- ▶ Click **Send**



Contract K12 – PM Review

Receive Task (PM)

- ▶ PM 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 District Training Project 1**

Contract K12 CON-011 is sent to you for **PM Review**.

From : **Matthew Weber**
Sent For : **PM Review**

Source Name : **OAKS CI District Training Project 1**
Record No : **Contract K12 CON-011**
Title : **SFC-080001 Test**

[Unifier Login](#)

Accept Task (PM)

- ▶ To begin work on the record, click **Accept**

Contract K12 - SFC-080001 Test - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207812?task_id=207812&parent_id=0&viewOnly=0&project_id=1084&model=uck...

Contract K12

[Accept](#) [Decline](#)

General WBS Detail

Task Details

From
Matthew Weber

To
Archana Atrey; Jordan Zmary; Lance Witcher; Matthew Weber; Purna Irukulapa...

Sent For
PM Review

General

Project Number	Record Number
SFC-080001	CON-011
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date

Attachments

	Name			Title
Published Attachments				
<input checked="" type="checkbox"/>	K12+AE+Agreement+20...			
<input checked="" type="checkbox"/>	Submittal SFC-080001.pdf			
<input checked="" type="checkbox"/>	Technical Proposal SFC-...			

Total: 3

Review the Record (PM)

- ▶ Review all fields in the **General Section**
- ▶ Scroll down to the next section using the slider

The screenshot displays a web application interface for reviewing a record. The browser title is "Contract K12 - SFC 080001 Test 2 - Project No. SFC-080001 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208128/undefined/undefined?__uref=uuu662617325t3". The page title is "Contract K12". There are "Send Save" and a menu icon in the top right. The "General" section is highlighted with a red box and contains the following fields:

General	
Project Number	Record Number
SFC-080001	CON-013
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project - 1	06/02/2020 07:24 AM (UTC-5)
Facility Name	Status
	Pending
Title	Contract Type
SFC 080001 Test 2	Architect_Engineer
Contract No.	PS Acquisition Reference
SFC 080001 Test 2	
	Selection Method
	Competitive Selection

The "Attachments" section is visible on the right side of the screen. It shows a list of published attachments:

Published Attachments	
<input checked="" type="checkbox"/>	K12+AE+Ag
<input checked="" type="checkbox"/>	Submittal SF
<input checked="" type="checkbox"/>	Technical Pr

The total number of attachments is 3.

Review the Record (PM)

- ▶ Review fields in the **Contractor Information** section
- ▶ Scroll down to the next section

Contract K12 - SFC-080001 Test - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207812/undefined/undefined?__uref=uuu908840438t3

Contract K12 Send Save

General WBS Detail

Contractor Information

Contractor Name Dynamix Engineering	Vendor Legal Name
Federal Tax ID	Vendor Address 1 1108 City Park Avenue, 3rd Floor
Vendor Contact	Vendor Address 2
Vendor Contact Phone	Vendor City Columbus
Vendor Contact Fax	Vendor State Ohio
Vendor Contact Email	Vendor ZIP 43206
Drug Free Work Place Verified? Yes	EDGE Certified Prime? Yes
Clean Search of State Auditors Database? Yes	Joint Venture No

Attachments Comments Linked Record

Name
Published Attachments
<input checked="" type="checkbox"/> K12+AE+Agreement+20...
<input checked="" type="checkbox"/> Submittal SFC-080001.pdf
<input checked="" type="checkbox"/> Technical Proposal SFC-...

Total: 3

Review the Record (PM)

- ▶ Review **EDGE Waiver** section and the required documents fields
- ▶ Continue to the next section

Contract K12 - SFC 080001 Test 2 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208128/undefined/undefined?_uref=uuu662617325t3

Contract K12 Send Save

General WBS Detail

EDGE Waiver **Award Date**

EDGE Goal Percent

EDGE Commitment (%) **Minimum Construction Admin Hours/Week**

NOTE: A checkmark indicates a submission of this document is require.

Ohio Worker's Compensation Certificate

Certificate of Insurance

Proof of Licensing

EEO Requirement

Attachments Cr > ↔

Published Attachments

	Name
<input checked="" type="checkbox"/>	K12+AE+Agr
<input checked="" type="checkbox"/>	Submittal SF
<input checked="" type="checkbox"/>	Technical Pro

Total: 3

Review the Record (PM)

- ▶ Review fields:
 - ▶ **Funding Summary**
 - ▶ **Total Contract Amount**
 - ▶ **Difference should equal 0.00**

Contract K12 - SFC 080001 Test 2 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208128/undefined/undefined?_uref=uuu66261732513

Contract K12 Send Save

General WBS Detail

Funding Summary
Enter the Co-Funded and LFI Amounts for this Contract.

Co-Funded Amount (\$)	0.00
LFI Amount (\$)	0.00

Direct Personnel Expense (\$) 250,000.00

Basic Services Amount (\$) 250,000.00

Additional Services Amount (\$) 250,000.00

Reimbursable Cost Amount (\$) 250,000.00

Total Contract Amount	1,000,000.00
Line Item Total (\$)	1,000,000.00
Difference (\$)	0.00

Attachments Cc

Published Attachments

- K12+AE+Agre
- Submittal SFC
- Technical Pro

Total: 3

Review the Record (PM)

- Documents attached to the record are viewable under the **Attachments Tab**

The screenshot displays the 'Contract K12' record in a web application. The 'Attachments' tab is highlighted with a red circle. Below it, a table of 'Published Attachments' is highlighted with a red box. The table contains three entries:

	Name			
<input checked="" type="checkbox"/>	K12+AE+Agreement+20...			
<input checked="" type="checkbox"/>	Submittal SFC-080001.pdf			
<input checked="" type="checkbox"/>	Technical Proposal SFC-...			

The main content area shows a 'Funding Summary' section with input fields for 'Co-Funded Amount (\$)' and 'LFI Amount (\$)', both set to 0.00. Below this are several summary rows, each with a value of 250,000.00: 'Direct Personnel Expense (\$)', 'Basic Services Amount (\$)', 'Additional Services Amount (\$)', and 'Reimbursable Cost Amount (\$)'. At the bottom, the 'Total Contract Amount' and 'Line Item Total (\$)' are both 1,000,000.00, and the 'Difference (\$)' is 0.00.

Review the Record (PM)

- ▶ Once the record is ready to move forward, click **Send**

The screenshot displays a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207812/undefined/undefined?__uref=uuu9088404388`. The page title is "Contract K12". The main content area is divided into two sections: "Funding Summary" and "Attachments".

Funding Summary
Enter the Co-Funded and LFI Amounts for this Contract.

Co-Funded Amount (\$)	0.00
LFI Amount (\$)	0.00

Direct Personnel Expense (\$)	250,000.00
Basic Services Amount (\$)	250,000.00
Additional Services Amount (\$)	250,000.00
Reimbursable Cost Amount (\$)	250,000.00

Total Contract Amount	1,000,000.00
Line Item Total (\$)	1,000,000.00
Difference (\$)	0.00

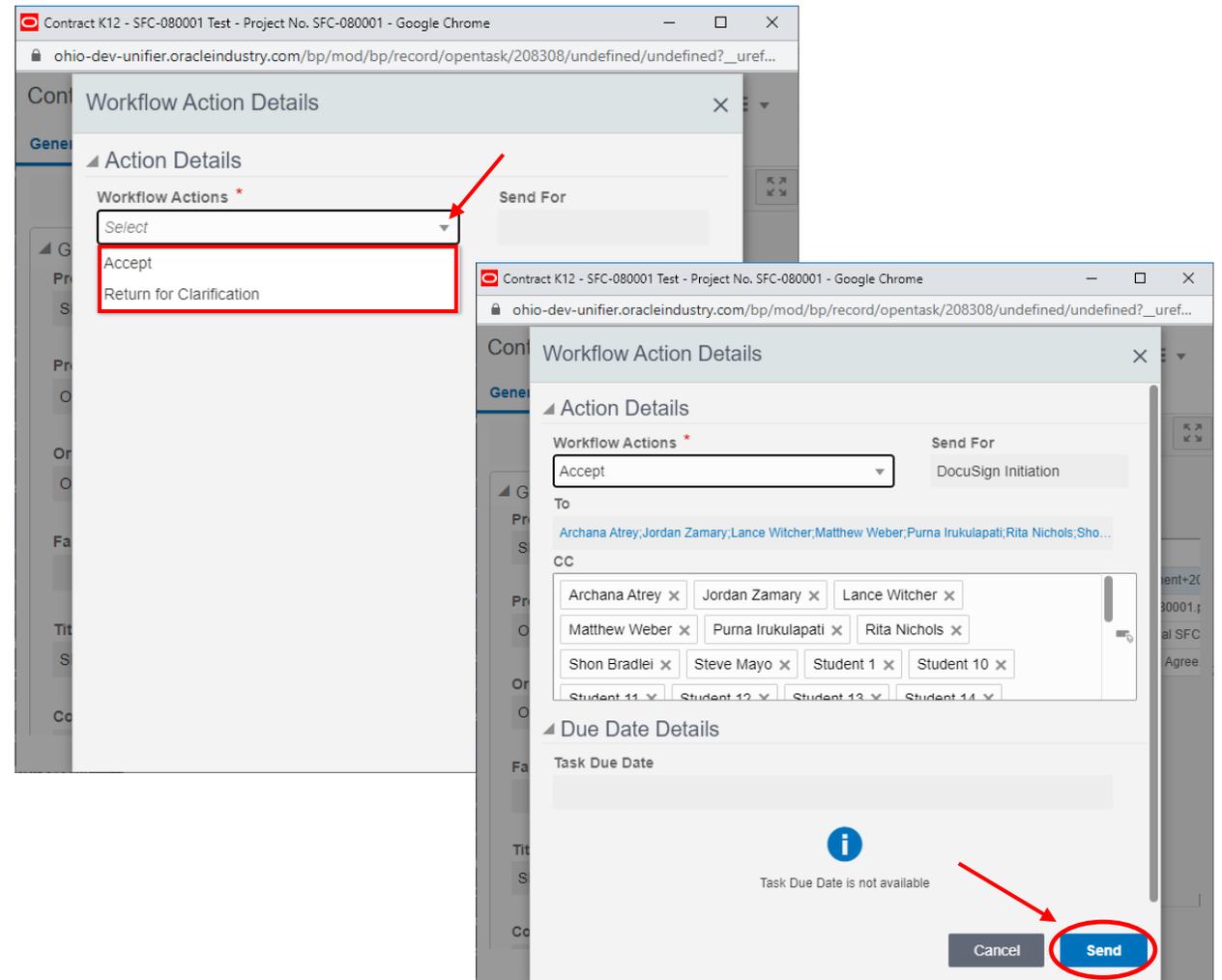
Attachments
Published Attachments

	Name			
<input checked="" type="checkbox"/>	K12+AE+Agreement+20...			
<input checked="" type="checkbox"/>	Submittal SFC-080001.pdf			
<input checked="" type="checkbox"/>	Technical Proposal SFC-...			

A red arrow points to the "Send" button in the top right corner of the page, which is circled in red. The "Save" button is also visible next to it.

Send the Record (PM)

- ▶ Verify the Workflow Action:
 - ▶ Select **Recommend Approval** if the record is ready to move forward for DocuSign Initiation
 - ▶ Select **Return For Clarification** if the record needs to be sent for update
- ▶ Click **Send**



Contract K12 – DocuSign Initiation (PC)

Receive Task (PC)

- ▶ 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: **OAKS CI District Training Project 1**

Contract K12 CON-013 is sent to you for PM Review.

From : **Matthew Weber**
Sent For : **PM Review**

Source Name : **OAKS CI District Training Project 1**
Record No : **Contract K12 CON-013**
Title : **SFC 080001 Test 2**

[Unifier Login](#)

Accept Task (PC)

- ▶ To begin work on the record, click **Accept**

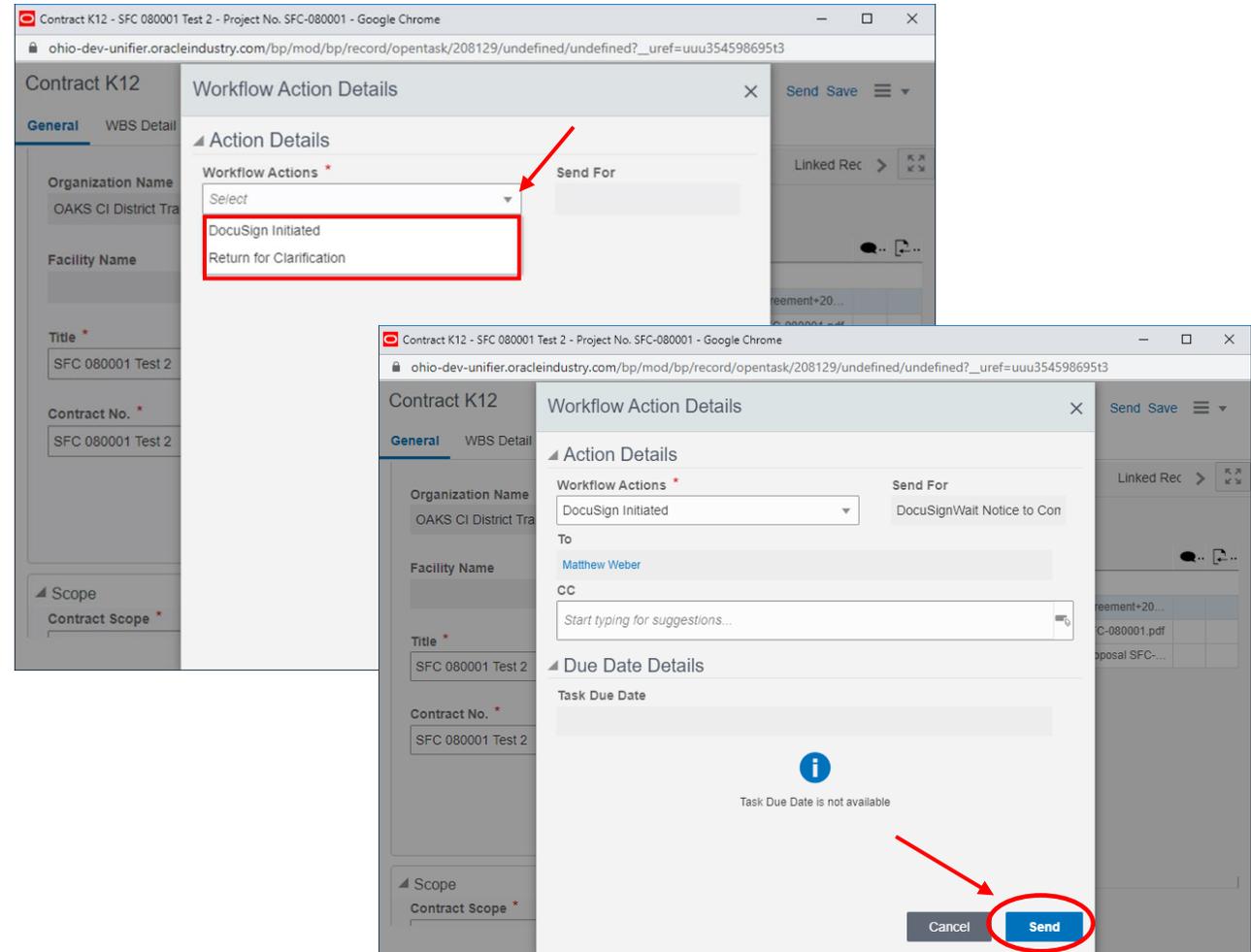
The screenshot shows a web browser window with the title 'Contract K12 - SFC 080001 Test 2 - Project No. SFC-080001 - Google Chrome'. The URL is 'ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208129?task_id=208129&parent_id=0&viewOnly=0&project_id=1084&m...'. The page title is 'Contract K12'. Below the title, there are two tabs: 'General' (selected) and 'WBS Detail'. A red arrow points to the 'Accept' button, which is circled in red. To the right of 'Accept' is 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 fields for 'From' (Matthew Weber), 'To' (Matthew Weber), and 'Sent For' (DocuSign Initiation). The 'General' section has fields for 'Project Number' (SFC-080001), 'Record Number' (CON-013), 'Project Name' (OAKS CI District Training Project 1), 'Creator' (Matthew Weber), 'Organization Name', and 'Creation Date'. On the right side, there is an 'Attachments' section with a table of published attachments. The table has columns for 'Name' and 'Status'. The attachments are: 'K12+AE+Agreement+20...', 'Submittal SFC-080001.pdf', and 'Technical Proposal SFC-...'. Each attachment has a checkbox and a gear icon. The total number of attachments is 3.

Name	Status
K12+AE+Agreement+20...	<input checked="" type="checkbox"/>
Submittal SFC-080001.pdf	<input checked="" type="checkbox"/>
Technical Proposal SFC-...	<input checked="" type="checkbox"/>

Send the Record (PC)

The DocuSign agreement has been initiated and the record is ready to move forward, verify the Workflow Action:

- ▶ Select **DocuSign Initiated** to move the record forward to DocuSign Notice to Commence
- ▶ Select **Return For Clarification** if the record needs to be sent for update
- ▶ Click **Send**



Contract K12 – DocuSign Wait Notice to Commence (PC)

Receive Task (PC)

- ▶ 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: OAKS CI District Training Project 1

Contract K12 CON-013 is sent to you for DocuSignWait Notice to Commence.

From : **Matthew Weber**
Sent For : **DocuSignWait Notice to Commence**

Source Name : **OAKS CI District Training Project 1**
Record No : **Contract K12 CON-013**
Title : **SFC 080001 Test 2**

[Unifier Login](#)

Accept Task (PC)

- ▶ Once the DocuSign agreement has been completed by the District, begin work on the record by clicking **Accept**

Contract K12

General WBS Detail

Task Details

From: Matthew Weber

To: Matthew Weber

Sent For: DocuSignWait Notice to Commence

General

Project Number: SFC-080001 Record Number: CON-013

Project Name: OAKS CI District Training Project 1 Creator: Matthew Weber

Organization Name: Creation Date:

Attachments

Published Attachments			
<input checked="" type="checkbox"/>			K12+AE+Agreement+20...
<input checked="" type="checkbox"/>			Submittal SFC-080001.pdf
<input checked="" type="checkbox"/>			Technical Proposal SFC-...

Total: 3

Add Purchase Order to Record

- Under the General tab, scroll down to the PO section

a) Click the Select button

b) Choose the appropriate PO, as indicated in the signed DocuSign agreement

c) Click **Select**

Title	PO Number	Total Am...	Contract Name
District Building Project PO 2020-1	2020615	0.00	
jkj	4564	0.00	
Jama Inc.	111111111	2,100,000.00	
AVG Contract	1948	0.00	
AVG Contract	987654	575,000.00	
Katie's Planning	85249684	5,000.00	
ELECTRICTY	1234	5,000.00	
Builders Risk Insurance	2222222	24,000.00	
Bernice's Temp Water	20180800	8,000.00	
Katie's Temp. Water	5847265	8,000.00	
Randy	1234	110,000.00	

Create Notice to Commence Service Letter (PC)

- a) Click **Save** in the top right corner
- b) Click the blue **Menu** button
- c) Select **Print -> Custom**

The screenshot shows a web browser window displaying the 'Contract K12' record. The browser address bar shows the URL: ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208130/undefined/undefined?__uref=uuu354598. The page title is 'Contract K12'. The main content area shows a 'General' tab with the following information:

General	
Project Number	Record Number
SFC-080001	CON-013
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project -	06/02/2020 07:24 AM (UTC-5)
Facility Name	Status
	Accepted
Title	Contract Type
SFC 080001 Test 2	Architect_Engineer

The interface includes a 'Send Save' button in the top right corner, a blue menu button, and a 'Print' dropdown menu. The 'Print' menu is open, showing options: HTML..., PDF..., Custom..., and a 'Published Attachments' section. The 'Custom...' option is circled in red. Red arrows labeled 'a', 'b', and 'c' point to the 'Save' button, the menu button, and the 'Custom...' option, respectively. The bottom of the page shows 'Total: 3'.

Notice to Commence (PC)

- d) Select **Notice to Commence Services**
- e) Click **OK**

Custom Format Print - Google Chrome

ohio-unifier.oracleindustry.com/bp/studio/bp/selectPrintFile?bp_type=u&k&...

Select a custom print template

Title ▲

- K-12 GC Request for Bidder Qualifications
- K12 AE Notice to Commence Services 2020 MAR_W7**
- K12 CMR Notice of Selection
- K12 CMR NTP NOC_2020_MAR_W7
- K12 CxA Notice to Commence Services_2020_MAR_W7
- K12 GC Merge - NTP Surety NOC_2020_MAR_W7
- K12 GC Notice of Intent to Award
- K12 Limited Scope Agreement_Form_M165-00_52_13.K12-2020-APR_W7
- K12 MP_&_GC_Agreement_Form_M140-00-52-00_2020-APR_W7

Select a template and format to print

Template: -Select- ▼

Format: -Select- ▼

Select options for Workflow Progress

All Steps

Visited Steps

Sort by: Completion Date ▼ Ascending ▼

OK Cancel

Notice to Commence Document (PC)

The document will download to your computer and will appear at the bottom of the record

The screenshot displays a software interface with a table and a right-hand form panel. The table has the following data:

No.	WBS Code	Code Name	Short Description
001	AE-AE-BE	Professional Design Budget	PS Design Budget

The right-hand panel contains the following fields:

- WBS Code: AE-AE-BE
- Code Name: Professional Design Budget
- Short Description: PS Design Budget
- Amount (\$): 1,000,000.00
- Notes: (empty text area)

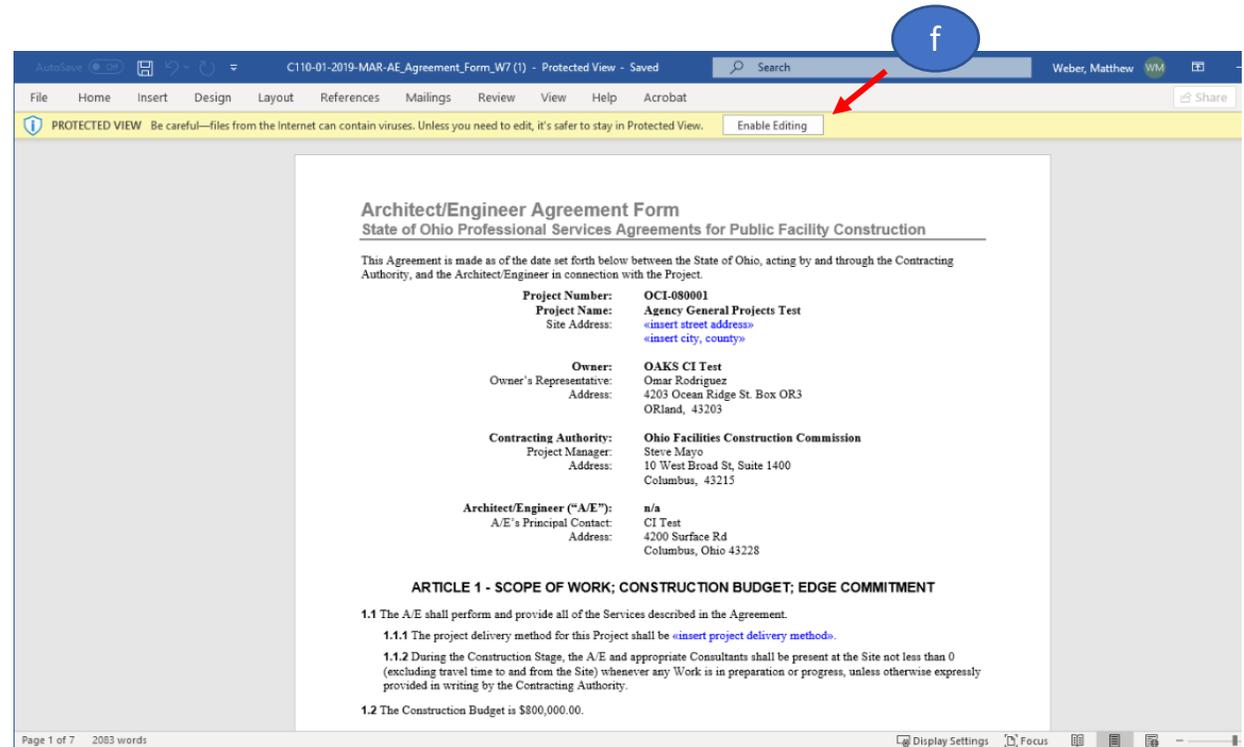
At the bottom of the table, there is a 'Total Amount' dropdown set to '1,000,000.00' and a 'Total: 1' label. A red circle highlights a download icon and the filename 'K12+AE+Agreeme...doc' at the bottom left of the table area.

Document Creation (PC)

Open the document

f. Click Enable Editing and update any necessary fields.

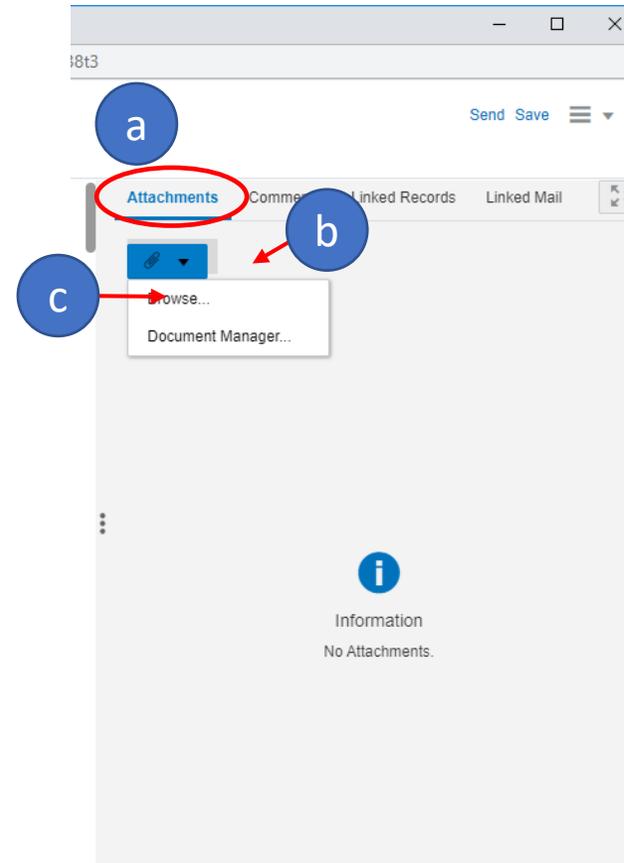
Once complete, Save the document to your computer



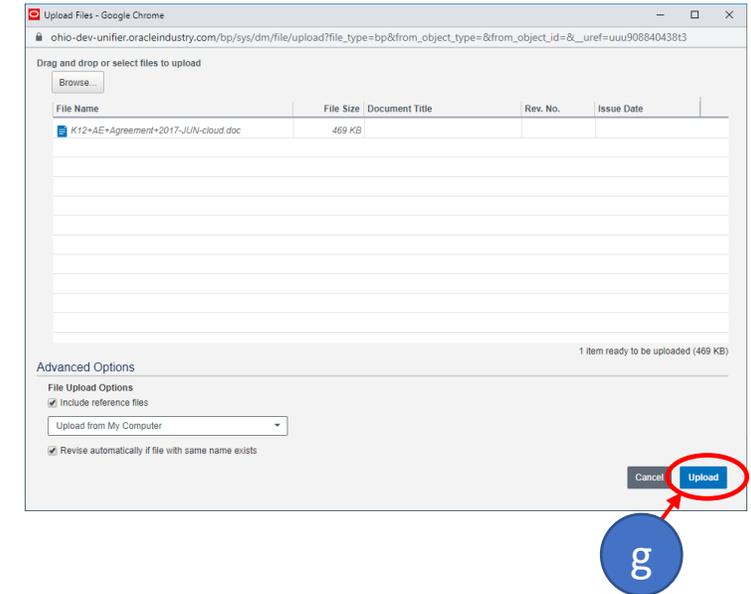
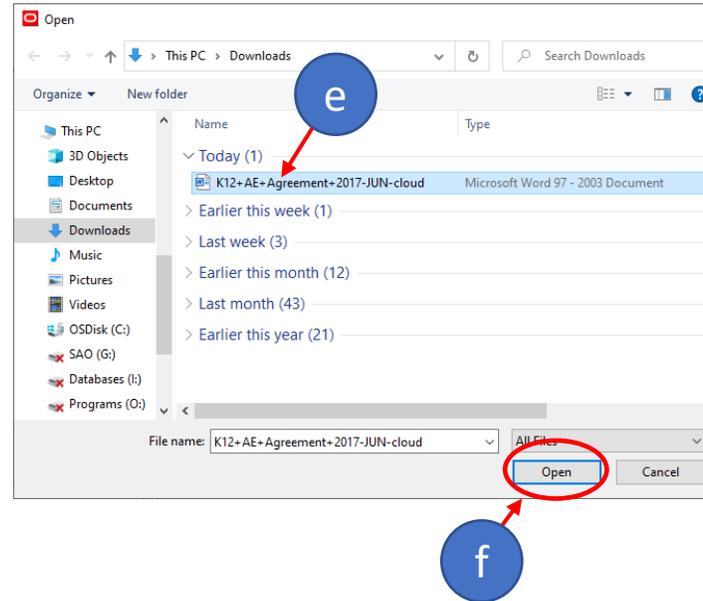
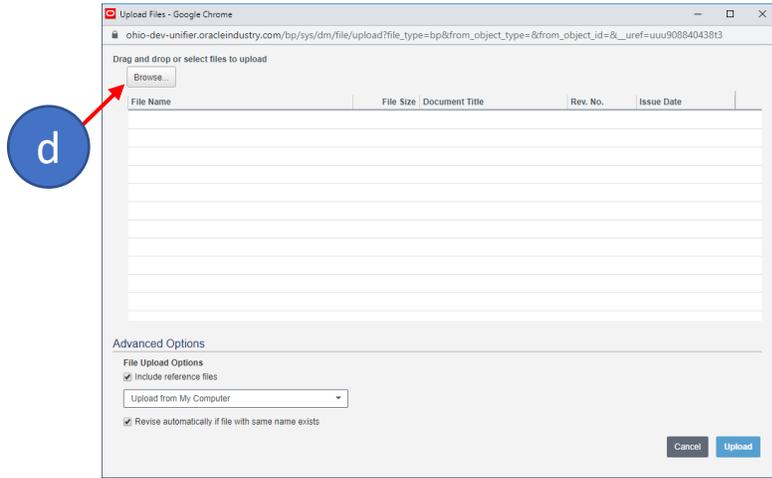
Attach Documents (PC)

- ▶ Return to the General Tab to attach the created document

- Open the Attachments Tab
- Click the Upload Button
- Select Browse



Attach Documents (PC)

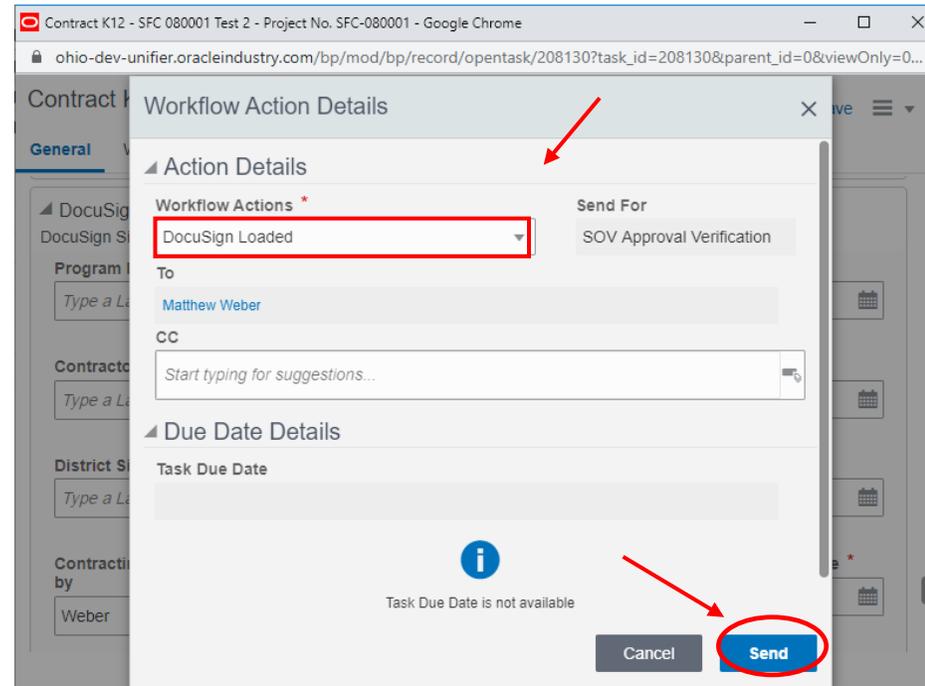


A window will pop up to upload the files.

- d) Click Browse
- e) Select the file from your computer
- f) Click Open
- g) Click Upload

Send the Record (PC)

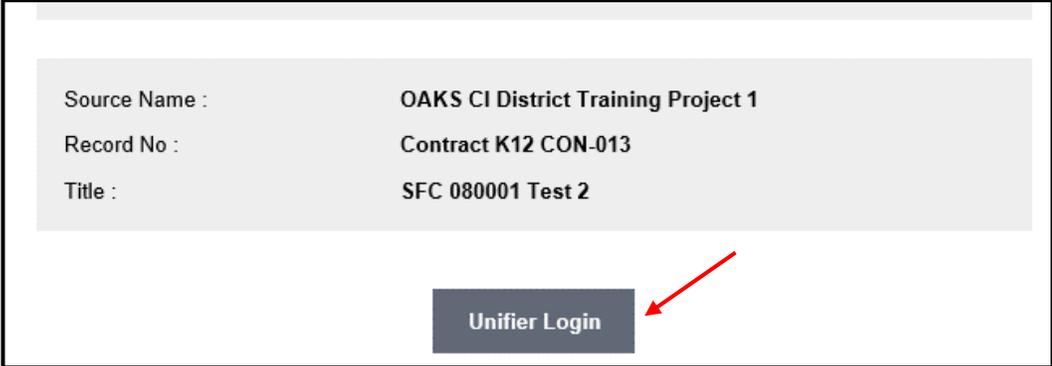
- ▶ Verify the Workflow Action:
DocuSign Loaded
- ▶ Click **Send**



Contract K12 – SOV Approval Await (PC)

Receive Task (PC)

- ▶ PC receives an Email
- ▶ **Hold notification until you have completed the [Contract SOV](#)**
- ▶ Once Contract SOV has been approved:
 - ▶ Click on the “Unifier Login” button to access the task



The screenshot displays a notification window with the following details:

Source Name :	OAKS CI District Training Project 1
Record No :	Contract K12 CON-013
Title :	SFC 080001 Test 2

Below the details is a button labeled "Unifier Login" with a red arrow pointing to it.

Accept Task (PC)

- ▶ To begin work on the record, click **Accept**

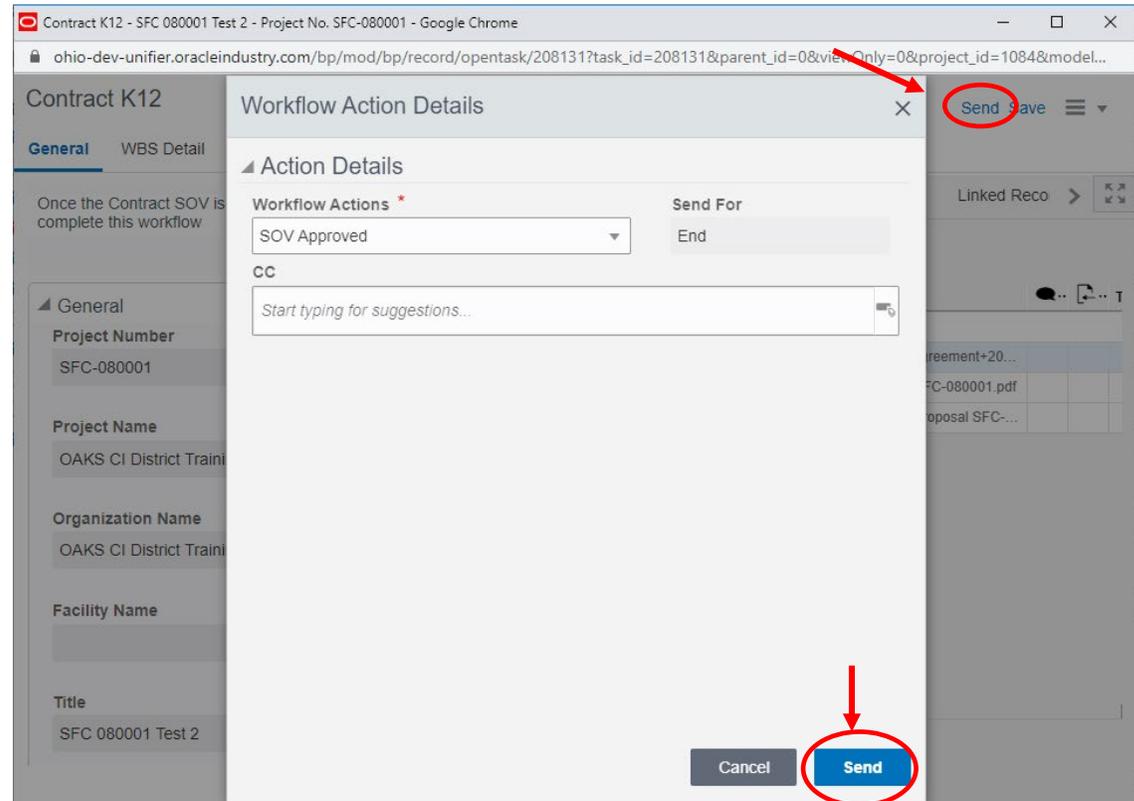
The screenshot shows a web browser window with the following details:

- Browser title: Contract K12 - SFC 080001 Test 2 - Project No. SFC-080001 - Google Chrome
- URL: ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/208131?_uref=uuu188940596t3
- Page title: Contract K12
- Navigation: **Accept** (circled in red with an arrow pointing to it), Decline, and a menu icon.
- Tabs: **General** (selected), WBS Detail
- Task Details section:
 - From: Matthew Weber
 - To: Matthew Weber
 - Sent For: SOV Approval Verification
- General section:
 - Project Number: SFC-080001
 - Record Number: CON-013
 - Project Name: OAKS CI District Training Pro
 - Creator: Matthew Weber
- Attachments section:
 - Published Attachments table:

	Name
<input checked="" type="checkbox"/>	K12+AE+Agreement+
<input checked="" type="checkbox"/>	Submittal SFC-080001
<input checked="" type="checkbox"/>	Technical Proposal SF
 - Total: 3

Finish Workflow (PC)

- ▶ If the SOV is approved, click **Send** to end the workflow
- ▶ Verify Workflow Actions: **SOV Approved**
- ▶ Click **Send**



Record Purchase Order

(District Staff)



Recording the Purchase Order

- ▶ **Utilizing your DocuSign contract, you must create the Purchase Order in your own financial system of record.**
- ▶ Once the Purchase Order has been created in your own financial system of record, record the Purchase Order in OAKS CI utilizing the instructions in the following slides:



Record a Purchase Order

▶ 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...> and the page title "Service Requests". The browser's address bar contains the user ID "uuuu600419530". The page header includes several navigation tabs: "Company Work...", "ACF Fire Protec...", "OSHP Academy...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a dropdown arrow icon next to the "Agency General..." tab, labeled with a blue circle 'a'. Below the tabs, a search bar contains the text "DPS:". A red arrow labeled with a blue circle 'b' points to the search bar. Below the search bar, a table displays search results for projects. The table has three columns: "Name", "Number", and "Location". The results are as follows:

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
ODPS 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

At the bottom of the page, there is a footer area with the text: "eral Projects Test", "r Agency General Projects", "s Dollar (USD)", and "_prod+1003@oracleindustry.com".



Record a Purchase Order

- ▶ To record your Purchase Order in OAKS CI navigate to:
 - ▶ Logs -> **Purchase Orders K12**
 - ▶ Click **Create**

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'Company Work...', 'OAKS CI Traini...', and 'OAKS CI Distric...'. The left sidebar contains a list of navigation items, with 'Logs' and 'Purchase Orders K12' circled in red. A red arrow points to 'Purchase Orders K12'. The main content area displays 'Purchase Orders K12' with a '+ Create' button circled in red. Below the button is a table with columns 'Title' and 'PO N'.

Title	PO N
jdkj	4564
Jama Inc.	1111
AVG Contract	1948
AVG Contract	9876
Katie's Planning	8524
ELECTRICTY	1234
Builders Risk Insurance	2222
Bernice's Temp Water	2018
Katie's Temp. Water	5847
Randy	1234
Jim's Roofing Replacement	3800
PO for Katie's Boiler Facilitation	1564
brendas bash	4444
Katie's Temp. Electric	3456
Temp Electric	9000
Katie's Temporary Water Services	1234
CTL OA contract Purchase Order	PO 2
Dynamex Test 03	Dyna
Dynamix Test	Dyna



Complete General Section

- a) Enter the **Title** for the PO
- b) Select **Status**: Dispatched
- c) Select **PO Purpose**: Contract

The screenshot displays the Oracle Purchases interface for a Purchase Order record. The browser title is "Purchase Orders K12 - District Building Project PO 2020-1 - Project No. SFC-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/upok/40?_uref=uuu431438629t4©=1&project_id=1084". The page title is "Purchase Orders K12". The "General" section is active, showing the following fields:

- Project Number:** SFC-080001
- Record Number:** PO-022
- Project Name:** OAKS CI District Training Project 1
- Project Date:** 10/14/2020 09:30 AM (UTC-8)
- Facility Name:** (empty)
- Status:** Dispatched
- Title:** District Building Project PO 2020-1
- PO Purpose:** Contract
- Vendor Name:** Dynamix Engineering
- Contract Name:** SFC-080001 Test
- Amount (\$):** 1,000,000.00

Annotations on the screenshot include:

- A blue circle labeled 'a' with a red arrow pointing to the 'Title' field.
- A blue circle labeled 'b' with a red arrow pointing to the 'Status' dropdown menu.
- A blue circle labeled 'c' with a red arrow pointing to the 'PO Purpose' dropdown menu.



Complete General Section

- d) Next to Contract Name click the **Select** button to choose your record
- e) A new window will appear, left-click to select the appropriate contract
- f) Click **sELECT**

The screenshot displays the 'Purchase Orders K12' form in the Oracle Purchases system. The 'Contract Name' field is set to 'SFC-080001 Test'. A red box highlights the 'Select' button next to the contract name, with callout 'd' pointing to it. A new window titled 'Contract K12' is open, showing a table of contracts. Callout 'e' points to the 'Contract Name' column header in the table. Callout 'f' points to the 'Select' button at the bottom right of the dialog. The table contains the following data:

Contract No.	Contractor Name	Title	Original Cc Completion
SFC-080001-02-04	Dynamix Engineering	SFC-080001 Test	
SFC-080001-02-04	Dynamix Engineering	SFC-080001 Test	
SFC-080001-02-04	Dynamix Engineering	SFC-080001 Test	
SFC-080001-02-04	Dynamix Engineering	SFC-080001 Test	
SFC-080001-02-03 Test	CTL Engineering	SFC-080001-02-02 K12 T3	
SFC-080001-02-02 Test	CTL Engineering	SFC-080001-02-02 K12 OA Test	
SFC-080001-02-01 Test	Dynamix Engineering	SFC-080001-02-01 Test	
SFC 080001 Test 2	CTL Engineering	SFC 080001 Test 2	
Morris 001		Contract Test Morris 001	
Morris 001		Contract Test Morris 001	

The 'Purchase Orders K12' form also shows fields for 'Change Order Name', 'Miscellaneous Commit Name', 'Miscellaneous Change Order Name', and 'Miscellaneous Expense Name', each with an 'Amount (\$)' field set to 0.00. The 'PO Details' section shows 'OAKS PO No.' as 2020615 and 'OAKS PO Amount (\$)' as 0.00.



Complete General Section

- g) In the PO Details section - Ensure you plug in the Purchase Order number into the Record
- ▶ Do **NOT** plug in the PO amount until adding Distribution Lines (see next slides)

Purchase Orders K12 - District Building Project PO 2020-1 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/upok/40?__uref=uuu431438629t4©=1&project_id=1084

Purchase Orders K12 Submit Save

General PO Distribution Lines

Type a Title... 0.00

Miscellaneous Expense Name Amount (\$) 0.00

Type a Vendor Name...

g PO Details

OAKS PO No. * **Not Yet!**
2020615 0.00

PO Date MM/DD/YYYY

Date Dispatched MM/DD/YYYY

Financial System of Record Total Amount (\$) 0.00

Line Item Total (\$)

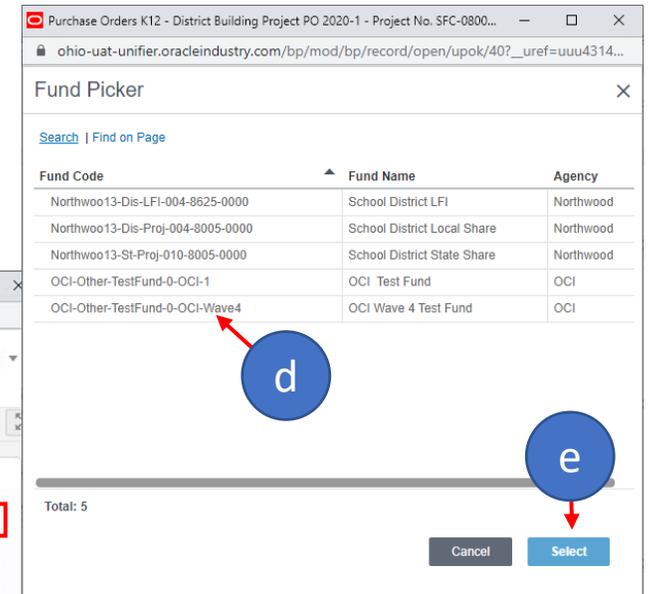
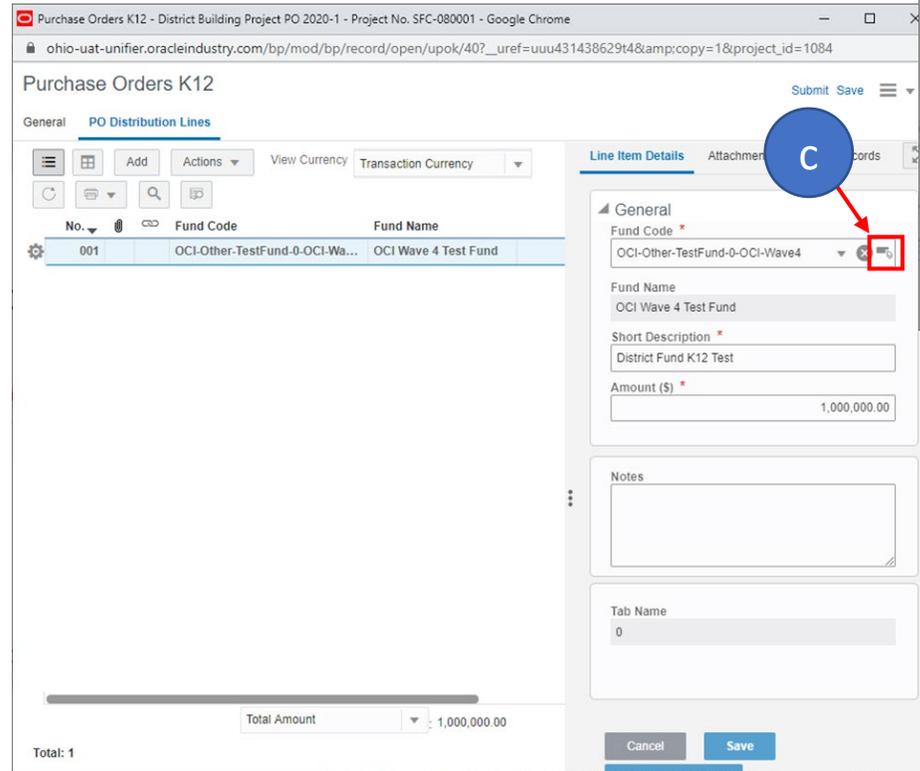
Attachments Comm >

Information No Attachments



Fund the PO

- c) Click the **Select** button
- d) Choose the appropriate fund code
 - ▶ **Note:** If you do not see any funds to choose from, email OAKS CI at oaksci@ofcc.ohio.gov
- e) Click **Select**



Fund the PO

- f) Enter a Short Description and Dollar Amount
- g) When finished entering information, click **Save**

Purchase Orders K12 - District Building Project PO 2020-1 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/upok/40?__uref=uuu431438629t4©=1&project_id=1084

Purchase Orders K12

Submit Save

General PO Distribution Lines

Add Actions View Currency Transaction Currency

No.	Fund Code	Fund Name
001	OCI-Other-TestFund-0-OCI-Wa...	OCI Wave 4 Test Fund

Line Item Details Attachments Linked Records

General

Fund Code *
OCI-Other-TestFund-0-OCI-Wave4

Fund Name
OCI Wave 4 Test Fund

Short Description *
District Fund K12 Test

Amount (\$) *
1,000,000.00

Notes

Tab Name
0

Cancel Save

Total: 1 Total Amount 1,000,000.00



Fund the PO

- ▶ When all lines are added, your lines will show up in the PO Distribution Lines tab

a) Next click the **General** tab to return to the upper form

Purchase Orders K12 - District Building Project PO 2020-1 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/upok/40?_uref=uuu431438629t4©=1&project_id=1084

Purchase Orders K12

Submit Save

General PO Distribution Lines

Add Actions View Currency Transaction Currency

No.	Fund Code	Fund Name	Amount
001	OCI-Other-TestFund-0-OCI-Wa...	OCI Wave 4 Test Fund	1,000,000.00

Line Item Details Attachments Linked Records

General

Fund Code *
OCI-Other-TestFund-0-OCI-Wave4

Fund Name
OCI Wave 4 Test Fund

Short Description *
District Fund K12 Test

Amount (\$) *
1,000,000.00

Notes

Cancel Save Save & Add New

Total Amount : 1,000,000.00

Total: 1



Finish the PO

- b) Under **OAKS PO Amount**, type in the dollar amount of your PO that you entered into the Line Item
- c) The **Difference** should be \$0
- d) Click **Finish Submit**

The screenshot shows the Oracle Purchase Orders K12 interface. The browser address bar displays the URL: `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/upok/40?_uref=uuu431438629t4©=1&project_id=1084`. The page title is "Purchase Orders K12". The "General" tab is selected, and the "PO Distribution Lines" section is visible. The "PO Details" section contains the following fields:

OAKS PO No. *	2020615
PO Date	MM/DD/YYYY
Date Dispatched	MM/DD/YYYY
Financial System of Record	OAKS FIN

The summary section on the right shows the following values:

OAKS PO Amount (\$)	1,000,000.00
Total Amount (\$)	1,000,000.00
Line Item Total (\$)	1,000,000.00
Difference (\$)	0.00

Annotations on the screenshot include:

- Circle 'b' pointing to the "OAKS PO Amount (\$)" field.
- Circle 'c' pointing to the "Difference (\$)" field.
- Circle 'd' pointing to the "Submit" button.

The "Submit" button is circled in red. The "Save" button is also visible next to it. The "Notes" section is empty. The "Information Attachments" section is partially visible on the right.



Subcontractor/Supplier Declaration



Subcontractor/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



Subcontractor/Supplier Declaration Create (A/E)



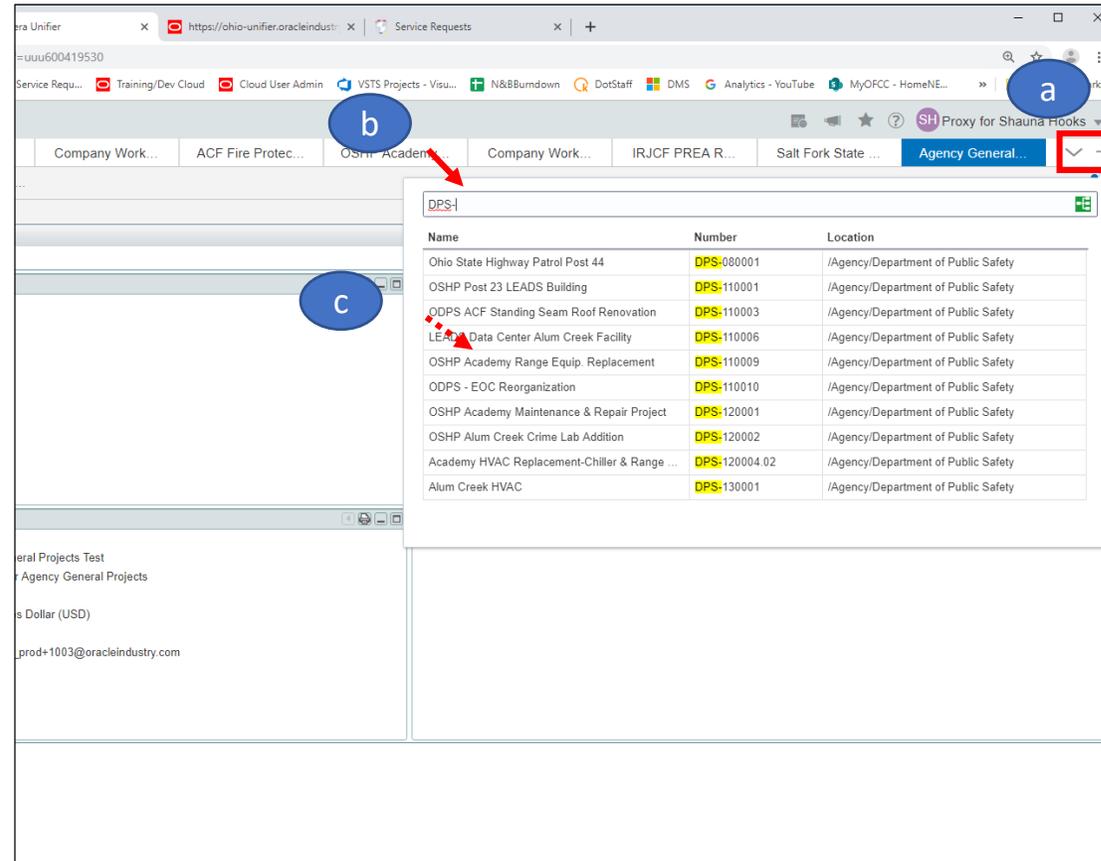
Create Subcontractor/Supplier Declaration (A/E)

► Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open



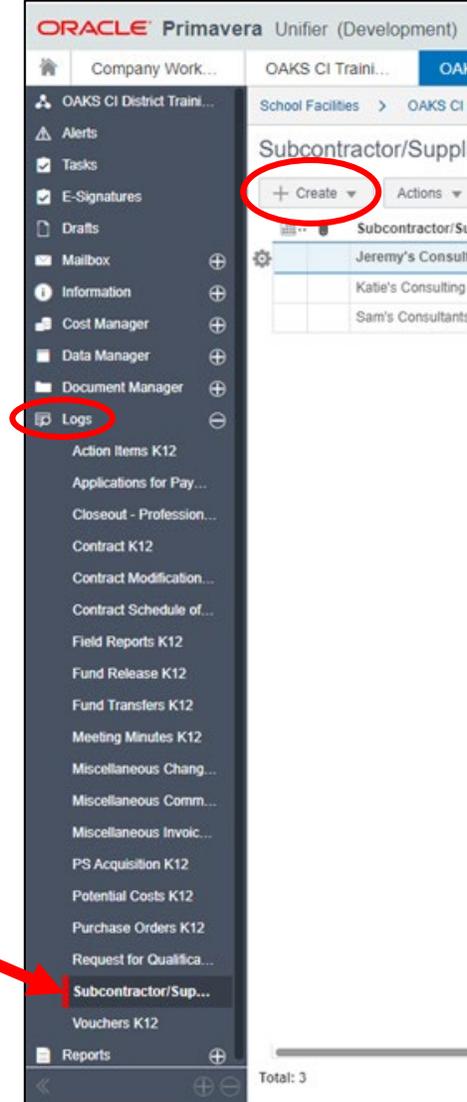
The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar shows the user ID "uuu600419530". The page has a navigation bar with several tabs, including "Company Work...", "ACF Fire Protec...", "OSHP - Academ...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the navigation bar, labeled "a". Below the navigation bar, there is a search bar containing the text "DPS-". A red arrow points to the search bar, labeled "b". Below the search bar, a table of projects is displayed. A red arrow points to the first row of the table, labeled "c".

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
ODPS 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



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Once in your project:
 - ▶ Click **Logs** -> **Subcontractor/Supplier Declaration**
 - ▶ Click **Create**



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Complete the General section
- a) **The Title should house the name of the company utilized**

Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/usdk1/1084/2956?__uref=uuu257750360t3

Create New Subcontractor/Supplier Declarations K12

Send Save

General

General

Complete one record for each subcontractor and material supplier used.

Project Number	Record Number
SFC-080001	
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project - 1	
Facility Name	Status
Title *	
CTL Engineering	
Contract Name *	Contractor Name
SFC-080001-02-02 K12 T3	CTL Engineering

Attachments

Information
No Attachments.



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Complete the **General Section**
- b) Click the button in the Contract Name field to select a Contract
- c) Choose a Contract from the new window
- d) Click **Select**

Contract K12

Contract No.	Contractor Name	Title	Original Contract C...	Tc
SFC-080001-02-03 T...	CTL Engineering	SFC-080001-02-02 K12 T3		
SFC-080001-02-02 Test	CTL Engineering	SFC-080001-02-02 Test		
SFC-080001-02-02 Test	CTL Engineering	SFC-080001-02-02 K12 OA Test		
SFC-080001-02-02 Test	CTL Engineering	SFC-080001-02-02 K12 OA Test		
SFC-080001-02-01 Test	Dynamix Engineering	SFC-080001-02-01 Test		
Morris 001		Contract Test Morris 001		
Morris 001		Contract Test Morris 001		
District Training Test 03	Dynamix Engineering	District Training Test		
03 District Training	Dynamix Engineering	CM District Training 003		
	Amazing Architectural Inc.	Dis. SOV Tempiaet Test		

Total: 10

Cancel Select



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Scroll down using the slider and complete the **Declaration Information** section

e) Fill out all required fields, denoted by a red asterisk *

f) Use the Tier 1 dropdown box to indicate if this is a Tier 1 subcontractor

e

Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/usdk1/1084/2956?_uref=uuu257750360t3

Create New Subcontractor/Supplier Declarations K12

Send Save

General

Declaration Information

Type *
Material Supplier

Tier 1 *
Yes

Subcontractor/Supplier Name *
Bob's Concrete

Subcontracted by:

Federal Tax ID *
01-00000000

Contact Person *
Joe Boblaw

Primary Officer *
Bob Boblaw

Phone No. *
614-555-5555

Address Line 1 *
30 E Spring St

Fax No.
N/A

Address Line 2

Email Address *
bob@email.com

City *
Columbus

State *
Ohio

ZIP *
43215

Attachments

Information
No Attachments.



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Scroll down using the slider and complete the **Additional Details** section
- g) Fill out all required fields, denoted by a red asterisk *
- h) If the Subcontractor is EDGE Certified, select Yes from the dropdown. If Yes is selected, you must also fill out the EDGE Certification number field.

g

h

g

h

Information
No Attachments.



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Once the General tab is complete and the record is ready to move forward:
 - Click **Send** at the top right
 - Verify Workflow – **Submit**
 - Click the **Send** button
 - ▶ The record will move forward to the PM for Declaration Review

The image displays two screenshots of a web application interface for creating a Subcontractor/Supplier Declaration. The top screenshot shows the 'General' tab with a 'Send' button circled in red and labeled 'i'. The bottom screenshot shows a 'Workflow Action Details' dialog box with 'Submit' selected in the 'Workflow Actions' dropdown, labeled 'j', and a 'Send' button at the bottom right labeled 'k'.



Subcontractor/Supplier Declaration Declaration Review (PM)



Accept the Task

- ▶ Click Accept to begin reviewing the record



Review the Record

- a) Review the information in the General section of the record
- b) Scroll down to the Declaration Information section

a

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207748/undefined/undefined?__uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

Send Save

General

Approve or reject the use of this subcontractor/material supplier on this contract.

General	
Project Number SFC-080001	Record Number SMSD005
Project Name OAKS CI District Training Project 1	Creation Date 05/21/2020 08:49 AM (UTC-5)
Organization Name OAKS CI District Training Project - 1	Creator Matthew Weber
Facility Name	Status Pending
Title CTL Engineering	
Contract Name SFC-080001-02-02 K12 T3	Contractor Name CTL Engineering

Attachments

No Attachments.



Review the Record

- c) Review the information in the **Declaration Information** section of the record
- d) Scroll down to the **Additional Details** section

c



d



Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207748/undefined/undefined?__uref=uuu505365360t3

Subcontractor/Supplier Declarations K12 Send Save

General

Declaration Information

Type	Tier 1
Material Supplier	Yes
Subcontractor/Supplier Name	Subcontracted by:
Bob's Concrete	
Federal Tax ID	Contact Person
01-00000000	Joe Boblaw
Primary Officer	Phone No.
Bob Boblaw	614-555-5555
Address Line 1	Fax No.
30 E Spring St	N/A
Address Line 2	Email Address
	bob@email.com
City	
Columbus	
State	
Ohio	
ZIP	
43215	

Additional Details

Attachments

No Attachments.



Review the Record

- e) Review the information in the **Additional Details** section of the record
- f) When the record is ready to move forward, click **Send**

e

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207748/undefined/undefined?__uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

General

Additional Details

Subcontractor PO Date	DFSP Enrolled
05/01/2020	No
Subcontractor/P.O. Amount \$	EDGE Certified?
100,000.00	Yes
Services/Material Brands	EDGE Certification Number
Concrete	123456789
Skilled Trade License No.	MBE
	Yes

Documents uploaded from the desktop will be stored in the Publish Path directory noted below.

FilePath
SMSD
Publish Path
SMSD/CTL Engineering/Bob's Concrete

Attachments

Information

No Attachments.

Send Save



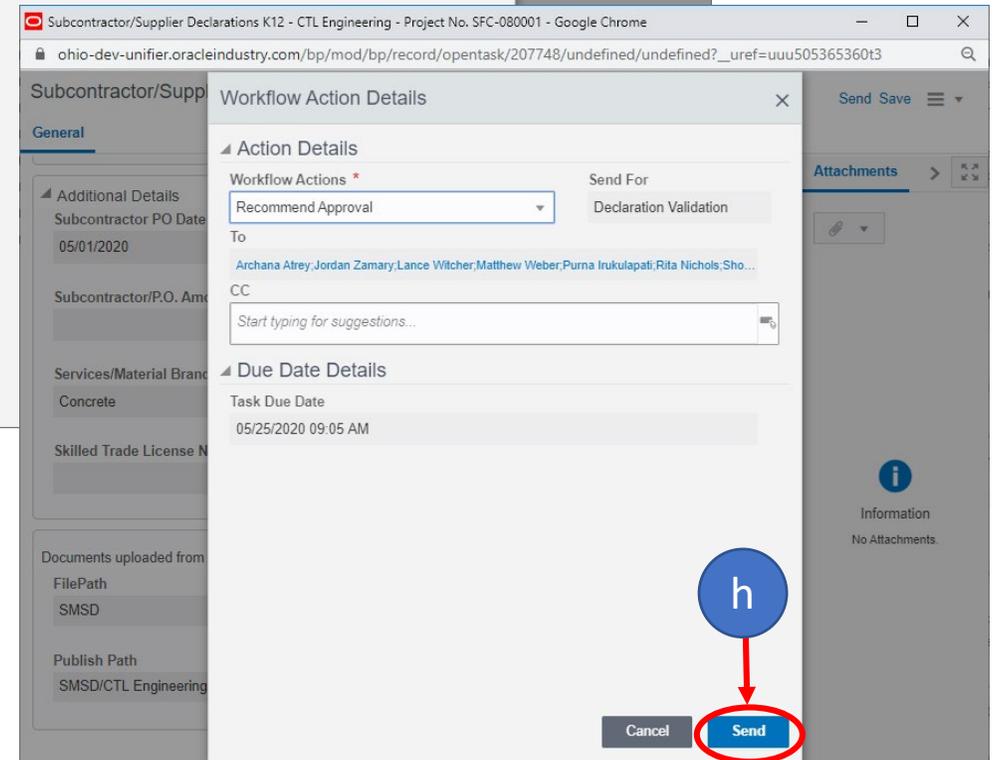
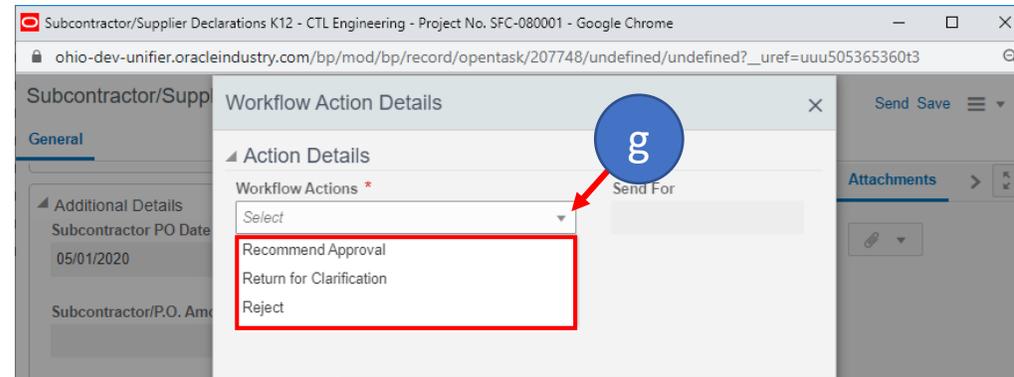
Send the Record

- ▶ Once the General tab is complete and the record is ready to move forward:

g) Select a Workflow Action

- ▶ **Recommend Approval** will move the record forward to PC for Declaration Validation
- ▶ **Return for Clarification** will return the record for Update
- ▶ **Reject** will terminate the record

h) Click the **Send** button



Subcontractor/Supplier Declaration Declaration Validation (PC)



Accept the Task

- ▶ Click Accept to begin reviewing the record



Review the Record

- a) Review the information in the General section of the record
- b) Scroll down to the Declaration Information section



Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207779/undefined/undefined?_uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

Send Save

General

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

General	
Project Number SFC-080001	Record Number SMSD005
Project Name OAKS CI District Training Project 1	Creation Date 05/21/2020 08:49 AM (UTC-5)
Organization Name OAKS CI District Training Project - 1	Creator Matthew Weber
Facility Name	Status Pending
Title CTL Engineering	
Contract Name SFC-080001-02-02 K12 T3	Contractor Name CTL Engineering

Attachments

Comments Linked Recor

Information
No Attachments.



Validate the Record

- c) Review fields in the Declaration Information section, **Validate** the Federal Tax ID
- d) Scroll down to the Additional Details section



Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207779/undefined/undefined?_uref=uuu505365360t3

Subcontractor/Supplier Declarations K12 Send Save

General

Declaration Information

Type	Tier 1
Material Supplier	Yes
Subcontractor/Supplier Name	Subcontracted by:
Bob's Concrete	
Federal Tax ID *	Contact Person
01-00000000	Joe Boblaw
Primary Officer	Phone No.
Bob Boblaw	614-555-5555
Address Line 1	Fax No.
30 E Spring St	N/A
Address Line 2	Email Address
	bob@email.com
City	
Columbus	
State	
Ohio	
ZIP	
43215	

Attachments Com

Information
No Attachments



Validate the Record

- e) Review fields in the Additional Details section
 - ▶ **Validate** DFSP Enrolled, EDGE Certified, and EDGE Certification Number

- f) Fill out the required **Validated?** Fields in the Subcontractor Supplier Validation section



Send the Record

- g) When the record is ready to move forward, click **Send**

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207779/undefined/undefined?_uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

General

Additional Details

Subcontractor PO Date	DFSP Enrolled
05/01/2020	No
Subcontractor/P.O. Amount \$	EDGE Certified?
100,000.00	Yes
Services/Material Brands	EDGE Certification Number
Concrete	123456789
Skilled Trade License No.	MBE
	Yes

Subcontractor Supplier Validation

Federal Tax ID	Validated? *
01-00000000	Yes
DFSP Enrolled	Validated? *
No	Yes
EDGE Certified?	Validated? *
Yes	Yes

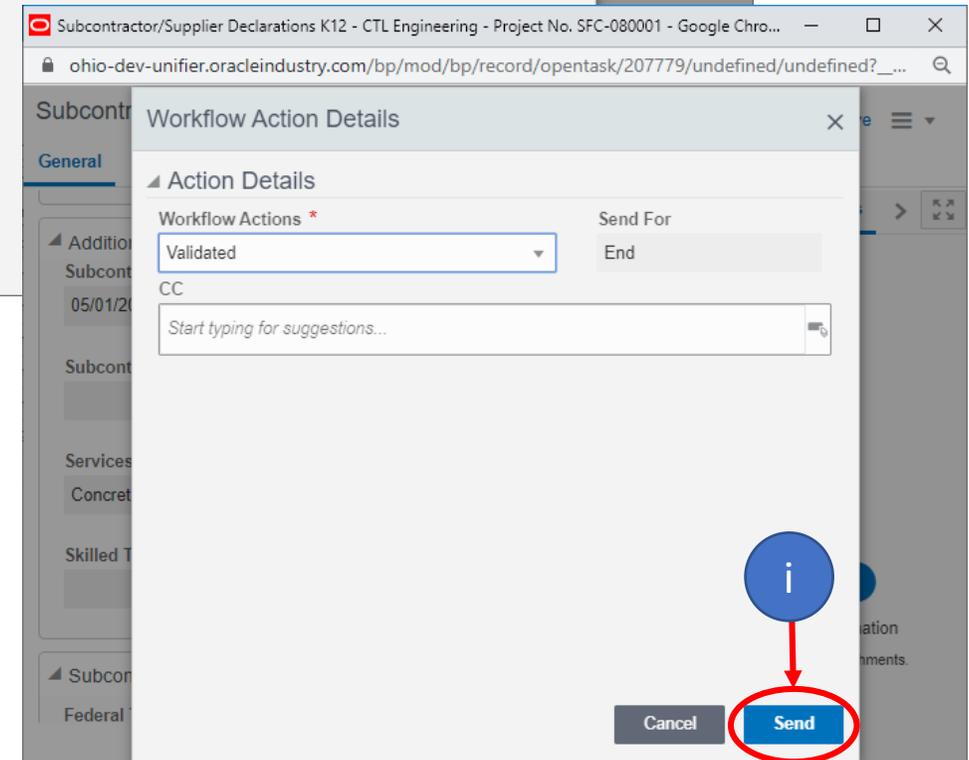
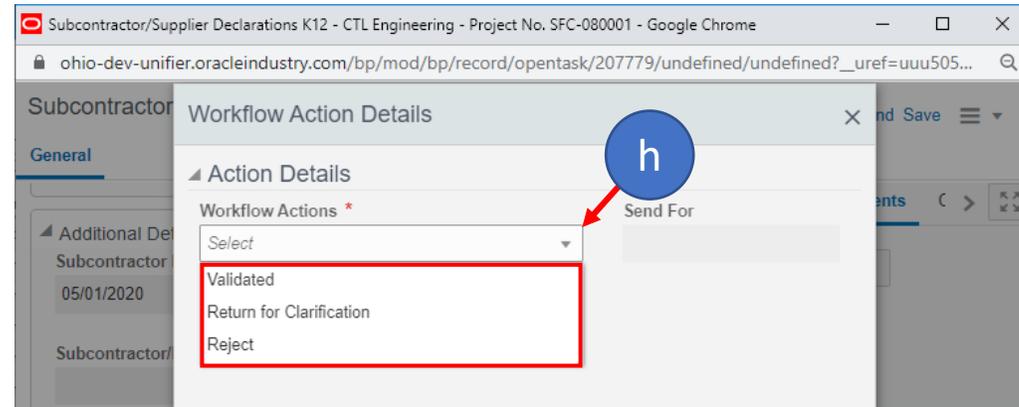
Attachments

Information
No Attachments.



Send the Record

- ▶ Once the record is ready to move forward:
- h) Select a Workflow Action
 - ▶ **Validated** will complete the record and end the workflow
 - ▶ **Return for Clarification** will return the record for Update
 - ▶ **Reject** will terminate the record
- i) Click the **Send** button



Validation Links

- Federal Tax ID Validation
 - <https://www.bwc.ohio.gov/employer/services/StateContract/nlbwc/StateContract1.aspx>
- 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>



Record Purchase Order

Recording the Purchase Order

Create the Purchase Order in your own financial system of record. Follow the instructions in these slides to record the Purchase Order in OAKS CI.



Recording the Purchase Order (Owner Financial)

- Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

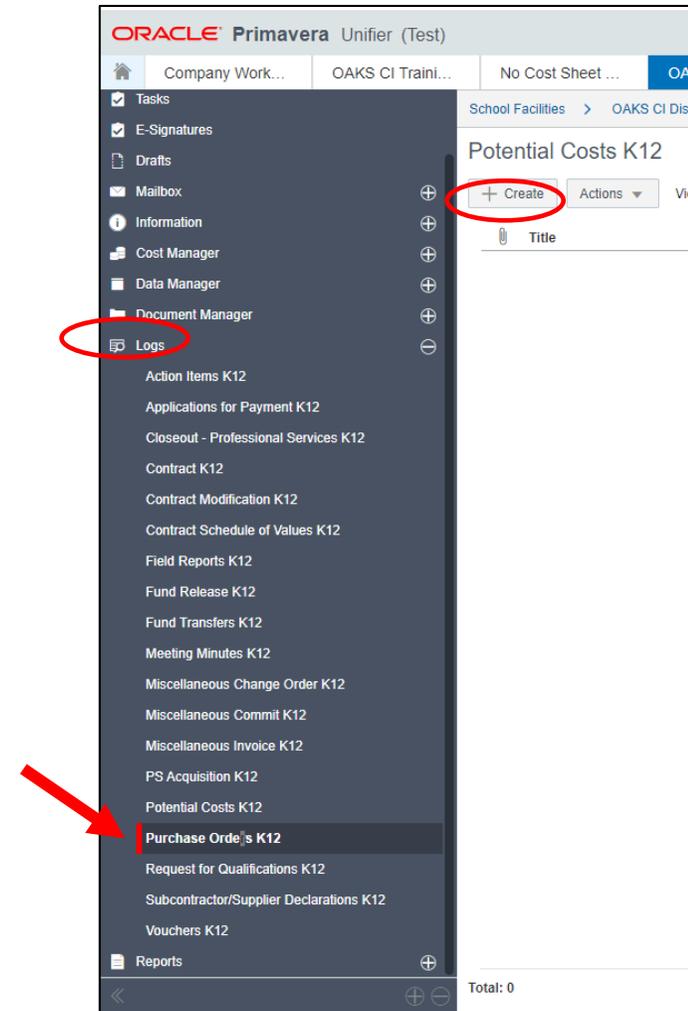
c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar contains the ID "uuu600419530". The page header includes several tabs: "Company Work...", "ACF Fire Protec...", "OSHP Academy...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the page header, labeled with a blue circle "a". Below the header, a search bar contains the text "DPS:". A red arrow labeled with a blue circle "b" points to the search bar. Below the search bar, a table displays search results. A red arrow labeled with a blue circle "c" points to the first row of the table. The table has three columns: "Name", "Number", and "Location".

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
ODPS 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

Record a Purchase Order

- ▶ To record your Purchase Order in OAKS CI navigate to:
 - ▶ Logs -> Purchase Orders K12
 - ▶ Click Create



Record a Purchase Order

- ▶ Enter the Title and select the Vendor for the Purchase Order
- ▶ Status: “Dispatched”
- ▶ Select: PO Purpose
 - ▶ (Agreement, Amendment, Contract, Change Order or Msc. Commit)

Create New Purchase Orders K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upok/1086?_uref=uuu163268504t5

Create New Purchase Orders K12

Submit Save

General PO Distribution Lines

General

Project Number: SFC-080001.01
Project Name: Oak Hills Local Building Project
School District:
Facility Name:
Vendor Name: Joe General Contractor
Record Number:
Creator: Matthew Weber
Creation Date:
Status *: Dispatched
PO Purpose *: Contract
Title *: K12 Purchase Order Example 1

PO Type

NOTE: Only pick one PO TYPE per record.

Contract Name: Test Contract 3	Amount (\$): 50,000.00
Change Order Name: Type a Title...	Amount (\$): 0.00
Miscellaneous Commit Name: Type a Record Number...	Amount (\$): 0.00

Attachments Comments Linked Records

Information
No Attachments.

Record a Purchase Order

- a) Click the selection button next to Contract Name
- b) Choose Contract
- c) Click Select

The screenshot shows the Oracle 'Create New Purchase Orders K12' interface. It is divided into two main windows. The left window is the main form, and the right window is a modal titled 'Contract K12'.

Left Window: Create New Purchase Orders K12

- General Tab:** Fields include Project Number (SFC-080001.01), Project Name (Oak Hills Local Building Project), School District, Facility Name, Title (K12 Purchase Order Example 1), Vendor Name (Joe General Contractor), Record Number, Creator (Matthew Weber), Creation Date, Status (Dispatched), and PO Purpose (Contract).
- PO Type Section:** A note states 'NOTE: Only pick one PO TYPE per record.' It contains three rows:
 - Contract Name: Test Contract 3 (with a selection button circled in red and labeled 'a'), Amount (\$): 50,000.00
 - Change Order Name: Type a Title..., Amount (\$): 0.00
 - Miscellaneous Commit Name: Type a Record Number..., Amount (\$): 0.00

Right Window: Contract K12

- Search | Find on Page
- Table with columns: Contract No., Contractor Name, Title, Original Contract Completion Date.
- Table content:

Contract No.	Contractor Name	Title	Original Contract Completion Date
71220-1	Bob Network Co.	Contractor SOV Test2	
123456	Joe General Contractor	Test - CMR 1	
072215	Joe General Contractor	Test Contract 3	
001	Steve's Electrical Contracting	Test - CMR	
		Morris Test	
- Total: 5
- Buttons: Cancel, Select (circled in red and labeled 'c').

Record a Purchase Order

- ▶ In the PO Details section:
 - e) Enter the Purchase Order number into the Record
 - f) Choose the Financial System of Record
- ▶ Do **NOT** plug in the PO amount until adding Distribution Lines (see next slides)

Create New Purchase Orders K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upok/1086?__uref=uuu163268504t5

Create New Purchase Orders K12

Submit Save

General PO Distribution Lines

PO Type
NOTE: Only pick one PO TYPE per record.

Contract Name	Amount (\$)
Test Contract 3	50,000.00
Change Order Name	Amount (\$)
Type a Title...	0.00
Miscellaneous Commit Name	Amount (\$)
Type a Record Number...	0.00
Miscellaneous Change Order Name	Amount (\$)
Type a Title...	0.00
Miscellaneous Expense Name	Amount (\$)
Type a Vendor Name...	0.00

PO Details

OAKS PO No. *	OAKS PO Amount (\$)
12345	0.00
PO Date	Total Amount (\$)
10/01/2020	0.00
Date Dispatched	Line Item Total (\$)
MM/DD/YYYY	0.00
Financial System of Record	Difference (\$)
OAKS FIN	0.00

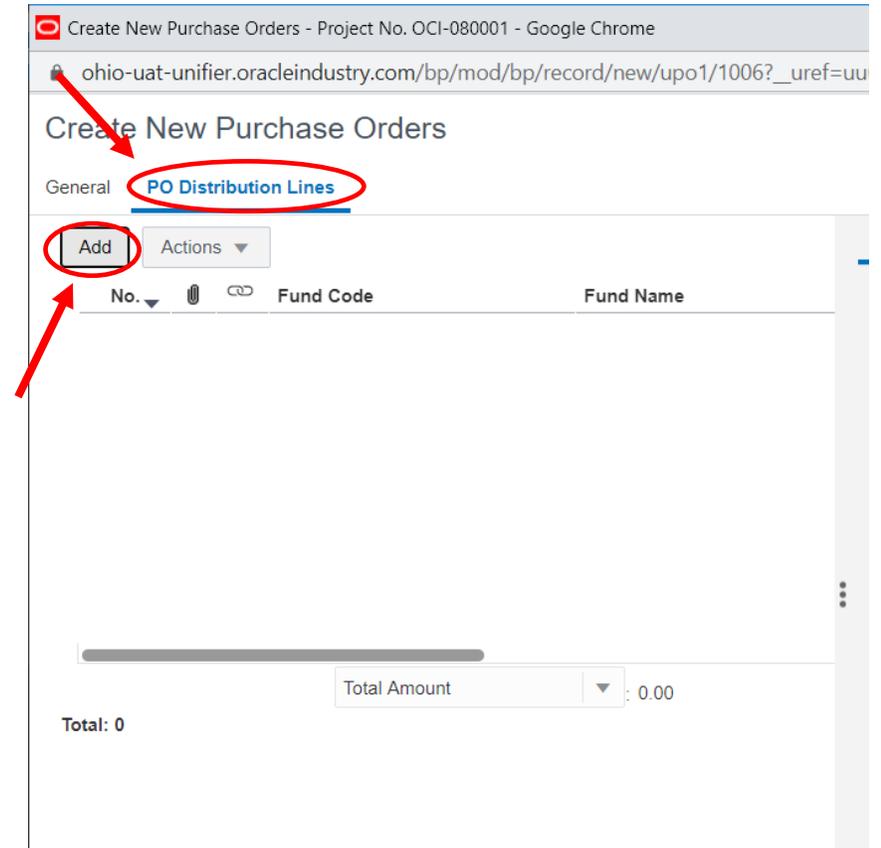
Not Yet!

Attachments Comments Linked Rec

Information
No Attachments.

Fund the PO

- ▶ Click the PO Distribution Lines Tab
- ▶ Click **Add**



Fund the PO

- a) Click Select
- b) Choose the appropriate fund code
 - **Note: If you do not see any funds to choose from, call OAKS CI**
- c) Enter a Short Description and Dollar Amount
- d) When finished entering information, click **Save**

The screenshot shows the 'Create New Purchase Orders' form in a web browser. The 'PO Distribution Lines' tab is active. A line item is being edited with the following details:

- Fund Code:** OCI-Other-TestFund-0-OCI-1 (Annotation a points to the dropdown menu)
- Fund Name:** OCI Test Fund
- Short Description:** Test Fund Description (Annotation c points to the text input field)
- Amount (\$):** 200,000.00 (Annotation c points to the numeric input field)
- Financial System of Record:** OAKS FIN
- Notes:** (Annotation d points to the text area)

At the bottom of the form, there are three buttons: 'Cancel', 'Save', and 'Save & Add New'. The 'Save' button is highlighted with a red arrow from annotation d.

The screenshot shows the 'Fund Picker' dialog box. It contains a table with the following data:

Fund Code	Fund Name	Agency
DRC-State-Approp-C0003-DRC-xxsse	Toled Correctional Rehab.	DRC
DRC-State-Approp-C50136-DRC-0	Adult Correctional Building Fund	DRC
OCI-Local-Auxiliaries-OSUMC-0-0	OCI Local Funds Example	OCI
OCI-Other-TestFund-0-OCI-1	OCI Test Fund	OCI
OCI-Other-TestFund-0-OCI-Wave4	OCI Wave 4 Test Fund	OCI
OCI-State-Approp-DASGSDOCInmn-DAS-GSD	Fred Projects Funding	OCI

Annotation b points to the 'OCI-Other-TestFund-0-OCI-1' row, which is highlighted in blue. Below the table, there is a 'Total: 6' label and two buttons: 'Cancel' and 'Select'.

Fund the PO

- ▶ When all lines are added, your lines will show up in the PO Distribution Lines tab

The screenshot shows the 'Create New Purchase Orders' interface. The main table, titled 'PO Distribution Lines', contains one line item highlighted with a red border:

No.	Fund Code	Fund Name
001	OCI-Other-TestFund-0-OCI-1	OCI Test Fund

Below the table, a 'Total Amount' of 200,000.00 is displayed. To the right, the 'Line Item Details' form is open, showing the following fields:

- Fund Code ***: OCI-Other-TestFund-0-OCI-1
- Fund Name**: OCI Test Fund
- Short Description ***: Test Fund Description
- Amount (\$) ***: 200,000.00
- Financial System of Record**: OAKS FIN
- Notes**: (Empty text area)

At the bottom of the form are buttons for 'Cancel', 'Save', and 'Save & Add New'.

Finish the PO

- e) Go back to the upper form by clicking the General tab
- f) Type in the dollar amount of your PO that you entered for the Line Item
- g) **The difference should be \$0**
- h) Click **Submit**

The screenshot shows a web browser window titled "Create New Purchase Orders K12 - Project No. SFC-080001.01 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upok/1086?_uref=uuu163268504t5". The page title is "Create New Purchase Orders K12".

Annotations on the screenshot:

- e**: Points to the "General" tab in the "PO Distribution Lines" section.
- f**: Points to the "OAKS PO Amount (\$)" input field, which contains "50,000.00".
- g**: Points to the "Difference (\$)" input field, which contains "0.00".
- h**: Points to the "Submit" button in the top right corner.

The form fields include:

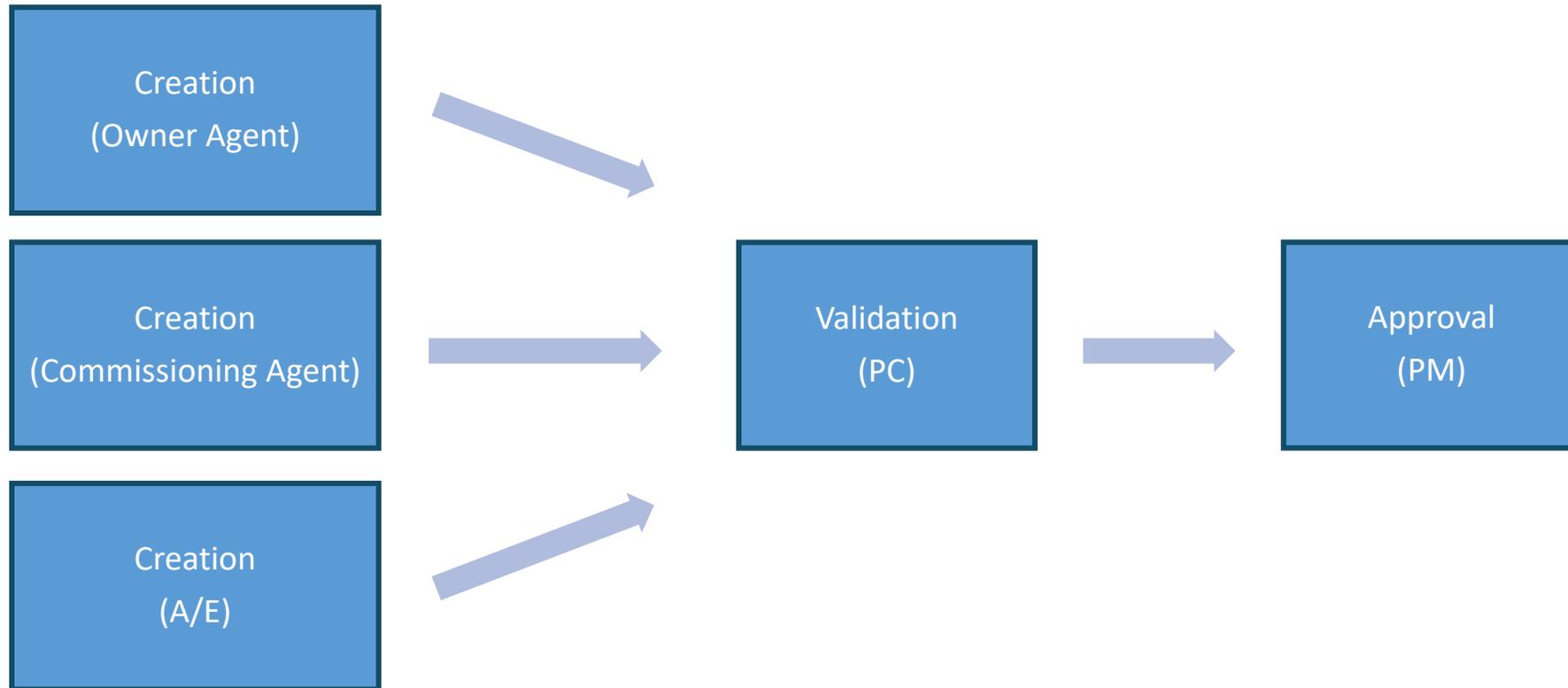
- Vendor Name: Type a Vendor Name... (0.00)
- PO Details:
 - OAKS PO No. *: 12345
 - OAKS PO Amount (\$): 50,000.00
 - PO Date: 10/01/2020
 - Date Dispatched: MM/DD/YYYY
 - Financial System of Record: OAKS FIN
 - Total Amount (\$): 50,000.00
 - Line Item Total (\$): 50,000.00
 - Difference (\$): 0.00
- Notes: (empty)
- Attachments: No Attachments.

Contract Schedule of Values

Contract SOV

Click the boxes to navigate directly to any section

▸ Workflow Steps



Contract Schedule of Values (Owner Agent)



Contract SOV Process Overview (OA)

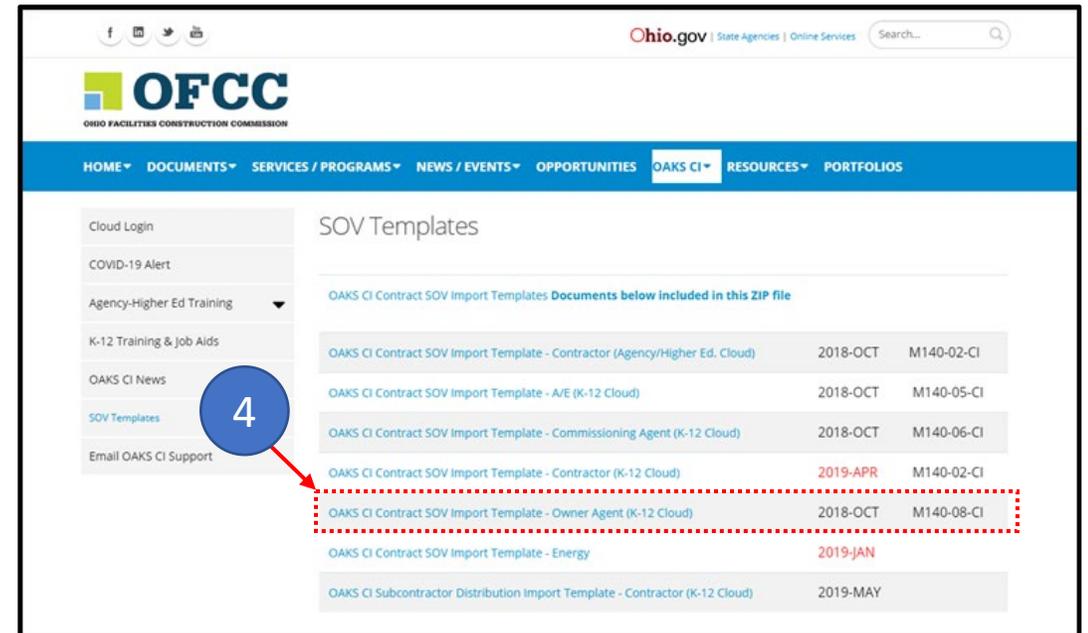
- ▶ The Owner Agent will:
 - ▶ Locate and Complete the SOV Spreadsheet
 - ▶ Email the Spreadsheet to the PC
 - ▶ Receive and Review the Contract SOV record in OAKS CI



Navigate to SOV Spreadsheet Template

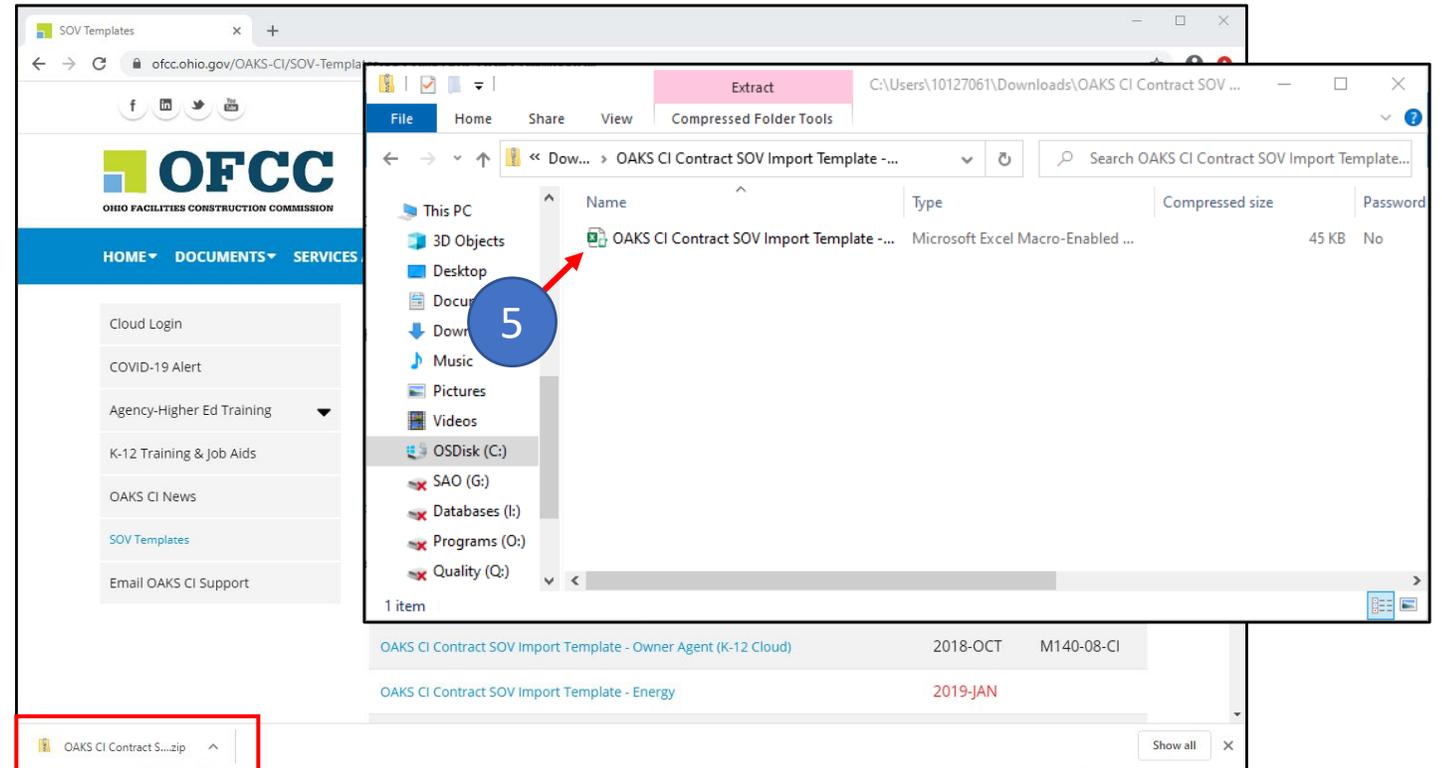
To view additional job aids and training materials for OAKS CI:

1. Navigate to ofcc.ohio.gov
2. Mouse over the OAKS CI tab
3. Click **SOV Templates**
4. Click the appropriate template to download the Excel Spreadsheet



Open SOV Spreadsheet Template

5. Open the downloaded Excel spreadsheet



Enter Contract SOV Line Items

- ▶ Enter Contract SOV Line Items
- ▶ 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

M140-08-CI-Contract_SOV_Template-OwnerAgent-K12_V2-01 (4) CLOUD - Excel

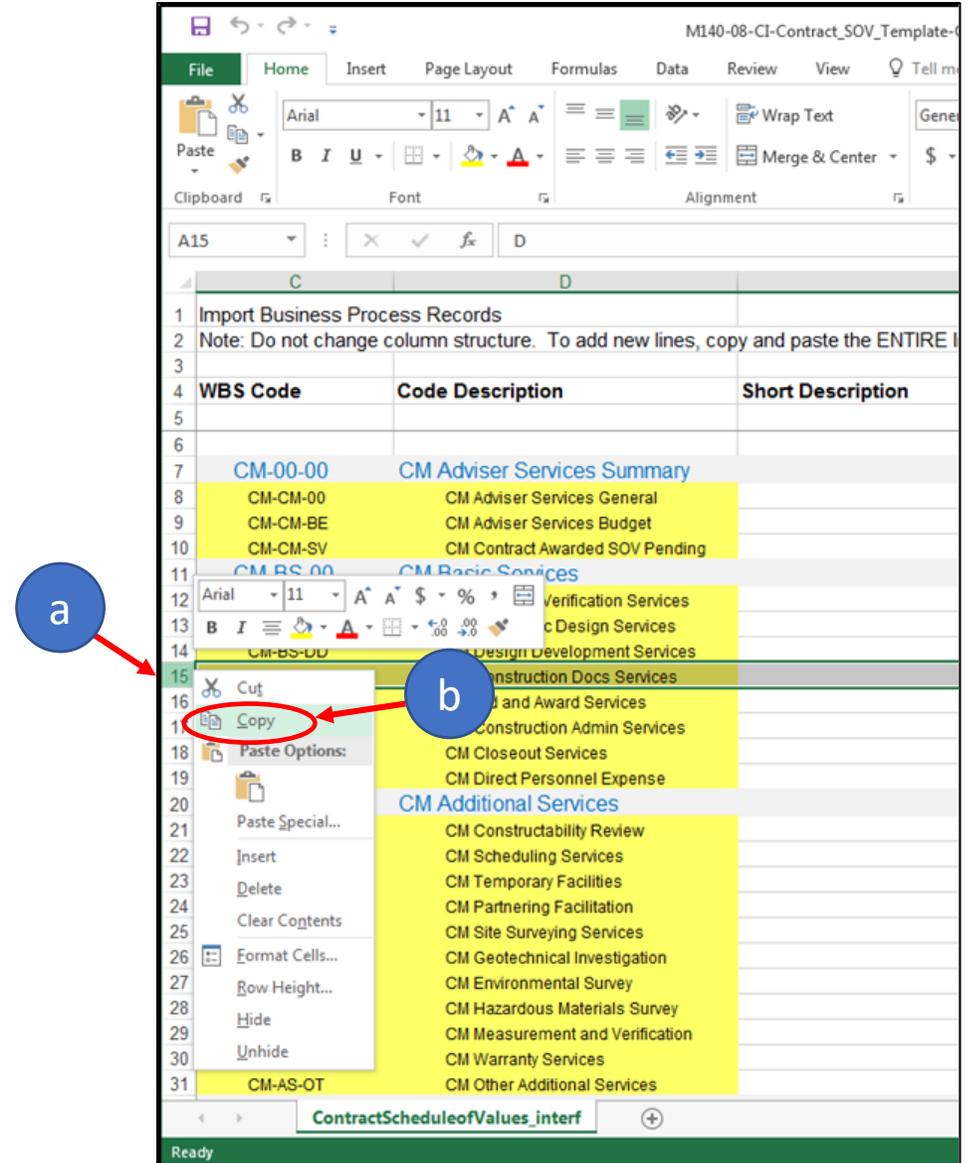
Prepare interface file

Code	Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent	EDGE Certified Prime Contractor?	Associated Building
			\$8,000.00				
	CM Adviser Services Summary						
	CM Adviser Services General	Owner's Agent Expenses	\$8,000.00	My Consultants	15	Yes	High School Renovation
	CM Adviser Services Budget						
	CM Contract Awarded SOV Pending						
	CM Basic Services						
	CM Program Verification Services						
	CM Schematic Design Services						
	CM Design Development Services						
	CM Construction Docs Services						
	CM Bid and Award Services						
	CM Construction Admin Services						
	CM Closeout Services						
	CM Direct Personnel Expense						
	CM Additional Services						
	CM Constructability Review						
	CM Scheduling Services						
	CM Temporary Facilities						
	CM Partnering Facilitation						
	CM Site Surveying Services						
	CM Geotechnical Investigation						
	CM Environmental Survey						
	CM Hazardous Materials Survey						
	CM Measurement and Verification						
	CM Monthly Services						



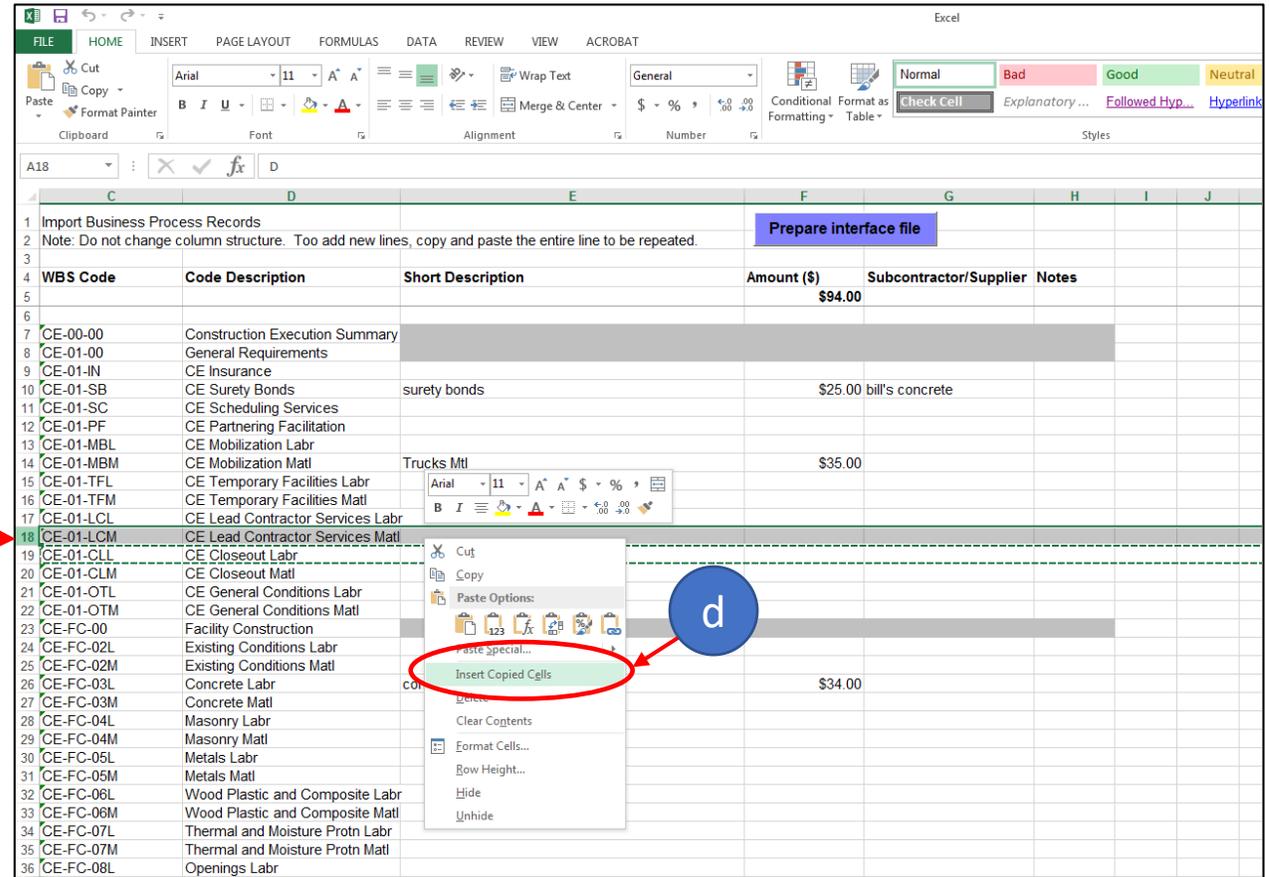
Adding Additional Lines

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



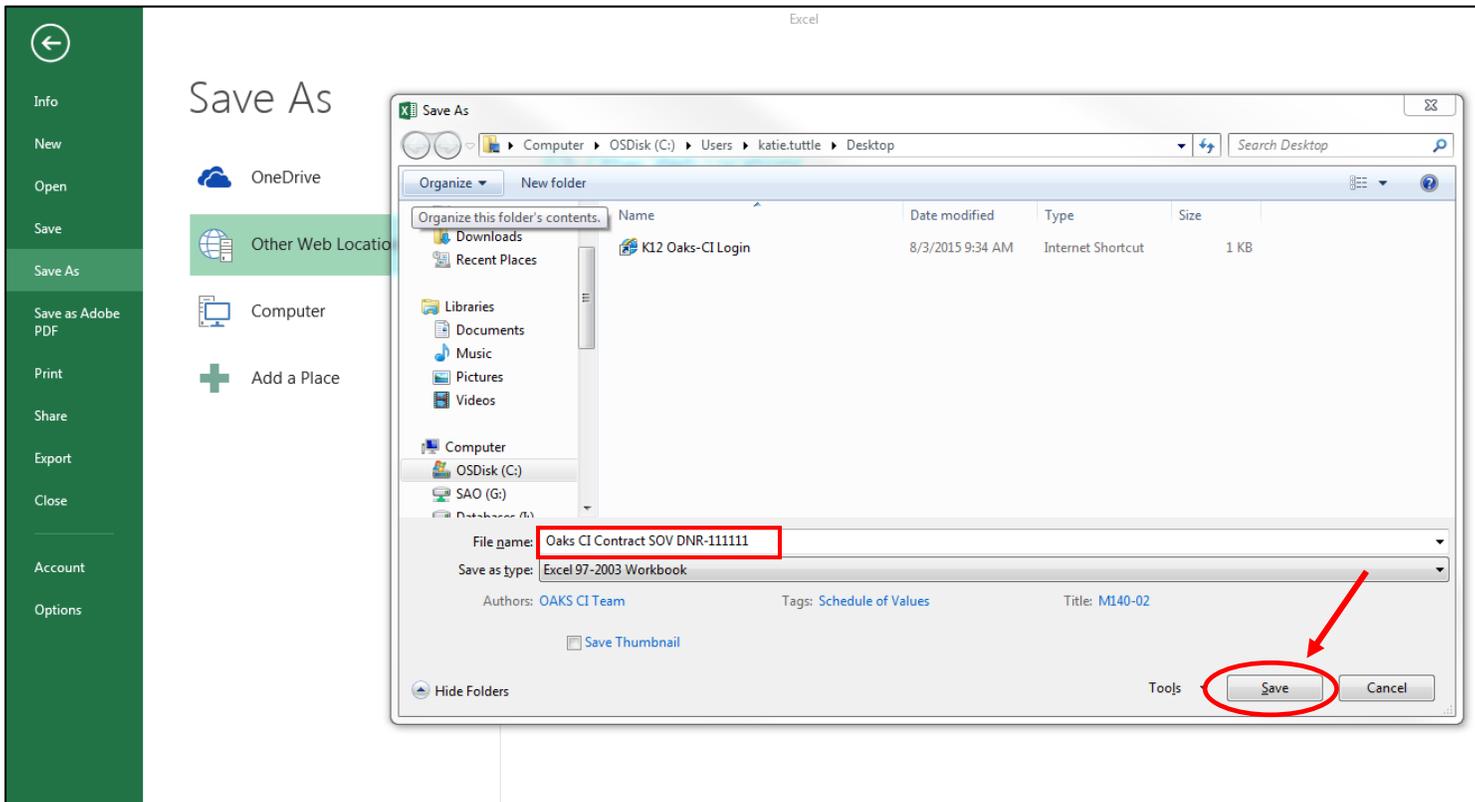
Adding Additional Lines

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



Save and Email your Spreadsheet

- ▶ **Name and Save the Spreadsheet – Very Important!**
- ▶ Email the Spreadsheet to your Project Manager and Project Coordinator for review



Contract SOV Record

- ▶ The Contract SOV record will be created by the Project Coordinator and will be sent to you for review
- ▶ You will receive an email notification that you have a Task Pending that needs your attention
- ▶ Click on the link to access your Task

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

Project/Shell: OAKS CI District Training Project 1

Contract Schedule of Values K12 SOV-008 is sent to you for Validation.

From : Matthew Weber
Sent For : Validation

Source Name : OAKS CI District Training Project 1
Record No : Contract Schedule of Values K12 SOV-008
Title : SOV CTL Engineering

[Unifier Login](#)



Accept the Task

- ▶ Click Accept to begin reviewing the record

Contract Schedule of Values K12 - OA SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207707?task_id=207707&parent_id=0&viewOnly=0&project_id=1084&model=ucsovk...

Contract Schedule of Values K12

Accept **Decline** [Menu]

General Contracts SOV Details

Task Details

From
Matthew Weber

To
Matthew Weber

Sent For
Validation

General

Project Number SFC-080001	Record Number SOV-009
Project Name OAKS CI District Training Project 1	Creator Matthew Weber

Attachments Comments Linked Records

i
Information
No Attachments.



Review the Task

- a) Review the General section of the SOV
- b) Review the Contract Information section of the SOV
- c) Review Notes
- d) Review any Attachments

The screenshot shows a web application interface for reviewing a Contract Schedule of Values (SOV). The page title is "Contract Schedule of Values K12" and the URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/ucsovkv/21/0...". The page has a "General" tab selected under "Contracts SOV Details".

Annotations on the screenshot:

- a**: A red bracket groups the "General" section, which includes fields for Project Number (SFC-080001), Record Number (SOV-009), Project Name (OAKS CI District Training Project 1), Creator (Matthew Weber), Organization Name (OAKS CI District Training Project - 1), Creation Date (05/21/2020 03:26 AM (UTC-5)), Facility Name, Status (Pending), and Title (OA SOV - UI).
- b**: A red bracket groups the "Contract Information" section, which includes fields for Contract No. (SFC-080001-02-01 Test), Contractor Name (Dynamix Engineering), Trade, Total Contract Amount (575,000.00), EDGE Certified Prime?, Line Item Total (\$) (575,000.00), Selection Method, and Difference (\$) (0.00).
- c**: A red arrow points to the "Notes" section at the bottom of the form.
- d**: A red arrow points to the "Attachments" tab on the right side of the page, which currently shows "No Attachments".



Review the Task

- e) Click the Contract SOV Details tab
- f) Review the line items

The screenshot shows a web browser window with the title 'Contract Schedule of Values K12 - OA SOV - UI - Project No. SFC-080001 - Google Chrome'. The URL is 'ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/ucsovkJ21/0/0?srcid=21&model=ucsovkJ&fromcostlog=1&project_id=1084&nfi=0&_uref=uuu71...'. The page title is 'Contract Schedule of Values K12'. There are two tabs: 'General' and 'Contracts SOV Details', with the latter selected and circled in red. A blue circle with the letter 'e' points to this tab. Below the tabs is a table with columns: 'No.', 'WBS Code', 'Code Name', 'Short Description', 'Amount (\$)', and 'LFI P...'. The table contains five rows, with the first row (005) highlighted in blue. A red box highlights the entire table. A blue circle with the letter 'f' points to the 'Line Item Details' tab on the right, which is also circled in red. The 'Line Item Details' panel shows fields for 'WBS Code' (CM-BS-BA), 'Code Name' (CM Bid and Award Services), 'Short Description' (pre design), 'Amount (\$)' (175,000.00), 'Subcontractor/Supplier' (Type a Subcontractor/Supplier...), 'LFI Percent' (0), 'District' (Oak Hills Local SD), 'Associated Building' (Type a Name...), and 'Facility Name'. At the bottom of the table, there is a 'Total Amount' field showing 575,000.00. The 'Save' button is visible at the bottom right of the 'Line Item Details' panel.

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI P...
005	CM-BS-BA	CM Bid and Award Se...	pre design	175,000.00	0
004	CM-AS-BE	CM Additional Services ...	closeout services	100,000.00	0
003	CM-BS-CA	CM Construction Admin...	Construction execution	150,000.00	0
002	CM-BS-SD	CM Schematic Design ...	construction admin	50,000.00	0
001	CM-BS-CL	CM Closeout Services	Bid and Award	100,000.00	0



Review the Task

- g) When the record is ready to move forward, click the **Send** button

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

- Browser: Google Chrome
- Page Title: Contract Schedule of Values K12 - OA SOV - UI - Project No. SFC-080001
- URL: ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/ucsov/21/0/0?srcid=21&model=ucsov&fromcostl...
- Page Content: "Contract Schedule of Values K12" with a "Send Save" button circled in red. A blue circle with a white 'g' and a red arrow points from the 'g' to the 'Send' button.
- Section: "General" (Contracts SOV Details)
- Instruction: "Validate the EDGE and LFI information submitted in this schedule of values."
- Form Fields:
 - Project Number: SFC-080001
 - Record Number: SOV-009
 - Project Name: OAKS CI District Training Project 1
 - Creator: Matthew Weber
 - Organization Name: OAKS CI District Training Project - 1
 - Creation Date: 05/21/2020 03:26 AM (UTC-5)
 - Facility Name: (empty)
 - Status: Pending
 - Title *: OA SOV - UI
- Attachments: No Attachments.



Review the Task

- h) Select the Workflow Action
- ▶ Choose **Validated** to move the record forward to the PM for Approval
 - ▶ Choose **Return for Clarification** for update
- i) Click **Send**

The image displays two screenshots of a web application interface for managing workflow actions. The top screenshot shows the 'Workflow Action Details' dialog box. The 'Workflow Actions' dropdown menu is open, showing 'Validated' and 'Return for Clarification' options. A red box highlights the 'Validated' option, and a blue circle with the letter 'h' points to it. The 'Send For' field is set to 'PM Approval'. The bottom screenshot shows the same dialog box with 'Validated' selected in the dropdown. The 'Send For' field is set to 'PM Approval'. The 'To' field contains a list of names: 'Archana Atrey, Jordan Zamar, Lance Witcher, Matthew Weber, Purna Irukulapati, Rita Nichols, Sho...'. The 'CC' field is empty. The 'Due Date Details' section shows 'Task Due Date' is not available. A blue circle with the letter 'i' points to the 'Send' button at the bottom right of the dialog box.

Requesting Payment

- ▶ Once the Contract SOV has been approved in OAKS CI, you will have the ability to create an Application for Payment
- ▶ For more information please see the [Application for Payment section of this document](#)



Contract Schedule of Values (Commissioning Agent)



Contract SOV Process Overview (Cx)

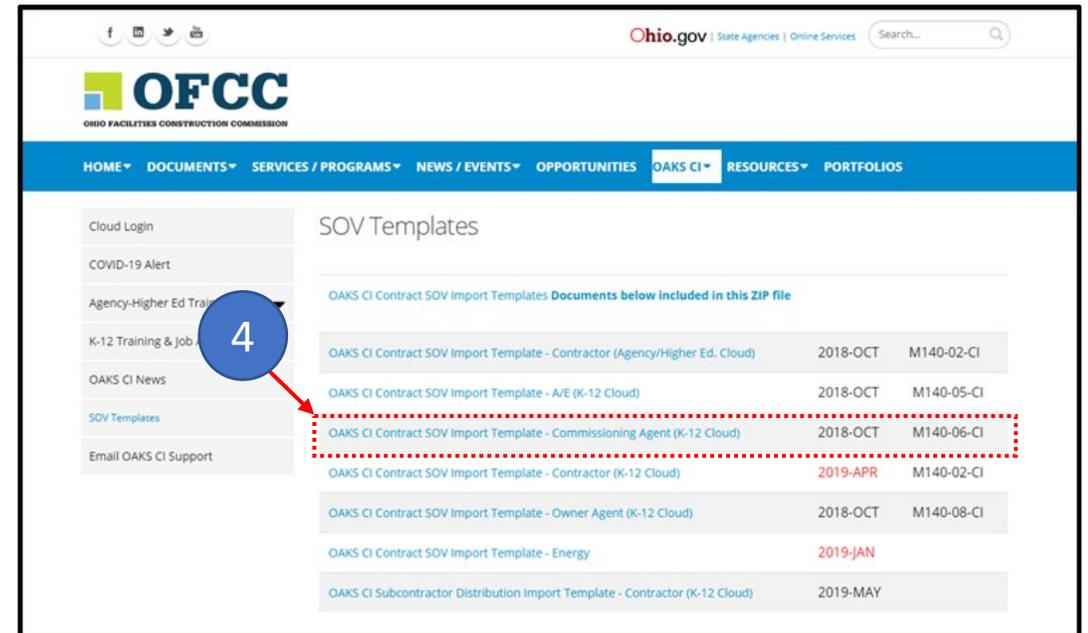
- ▶ The Commissioning Agent will:
 - ▶ Locate and Complete the SOV Spreadsheet
 - ▶ Email the Spreadsheet to the PC
 - ▶ Receive and Review the Contract SOV record in OAKS CI



Navigate to SOV Spreadsheet Template

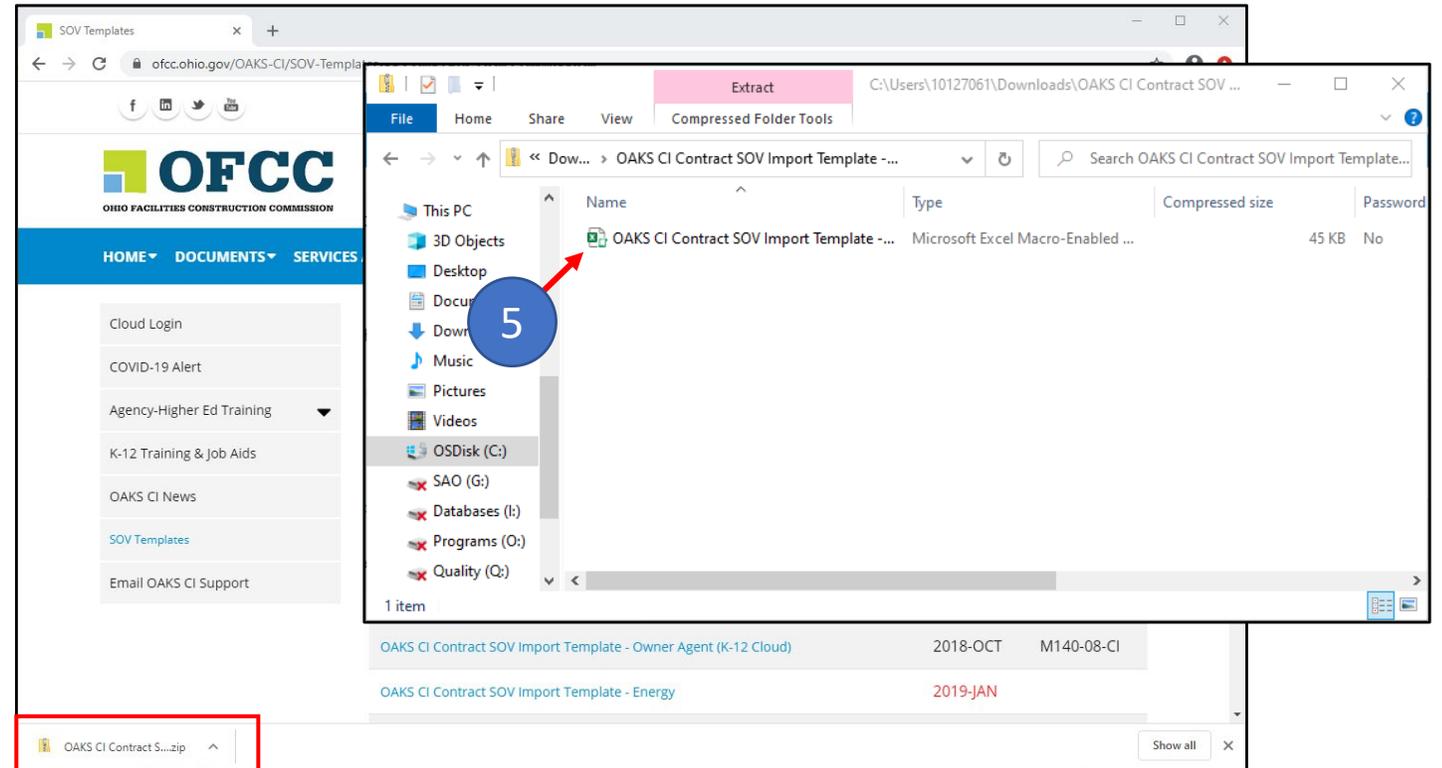
To view additional job aids and training materials for OAKS CI:

1. Navigate to ofcc.ohio.gov
2. Mouse over the OAKS CI tab
3. Click **SOV Templates**
4. Click the appropriate template to download the Excel Spreadsheet



Open SOV Spreadsheet Template

5. Open the downloaded Excel spreadsheet



Enter Contract SOV Line Items

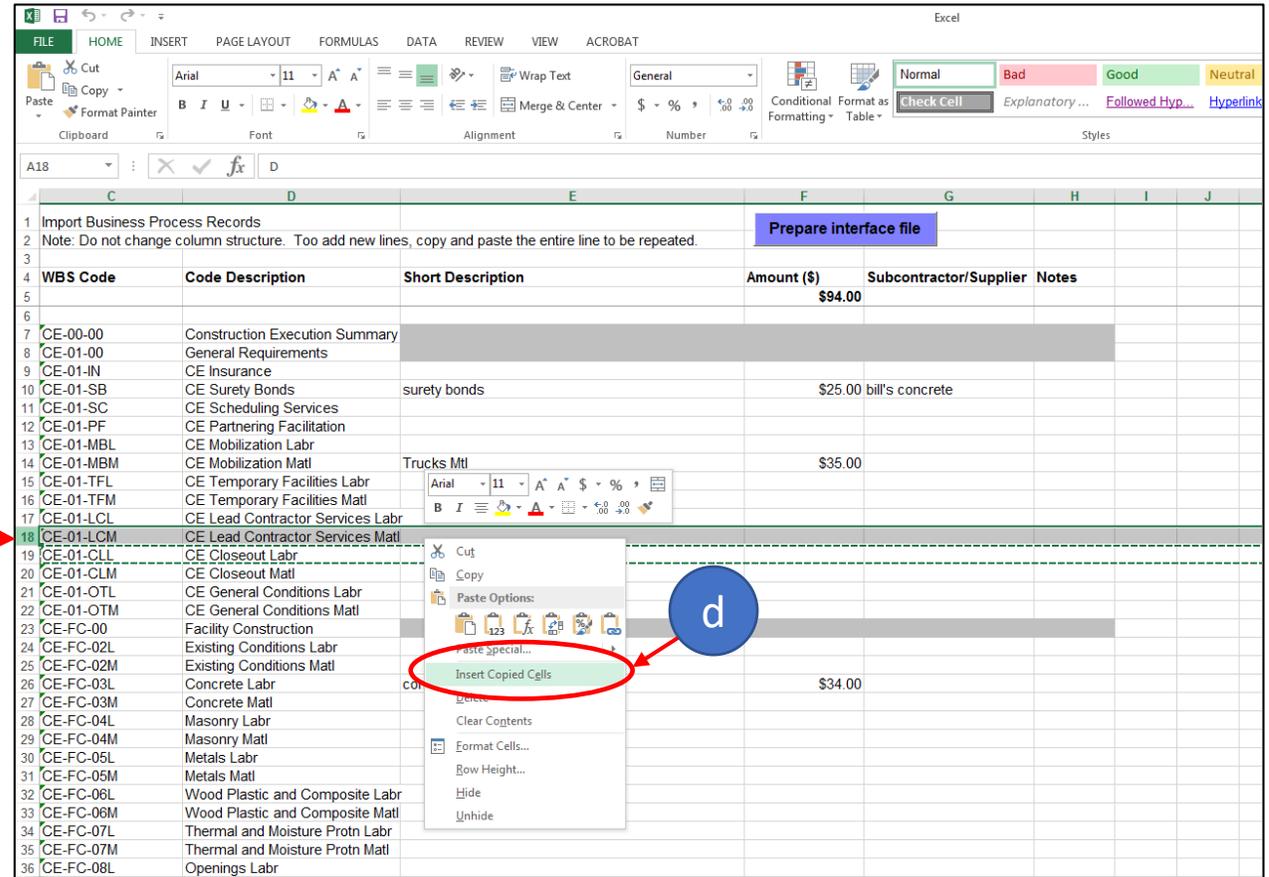
- ▶ Enter Contract SOV Line Items
- ▶ Include **ONLY** EDGE Subcontractors/Suppliers
 - ▶ *Note: If the Subcontractor/Supplier is EDGE, type (EDGE) next to your short description*
- ▶ Make sure to spell the name of the Subcontractor/Supplier **EXACTLY** the way it is reflected on the Subcontractor/Supplier Declaration record in OAKS CI

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier LP	Percent	EDGE Certified Prime Contractor?	Associated Building	Notes
			\$0.00					
Cx Basic Services								
Cx-BS-PV	Cx Program Verification Services	<Building Name> Schematic	\$0.00		0			Building Fee
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Eco Charrette	\$0.00		0			\$ -
Cx-BS-DD	Cx Design Development Services	<Building Name> Design Drawing	\$0.00		0			
Cx-BS-DD	Cx Design Development Services	<Building Name> Owners Design Intent Narrative	\$0.00		0			
Cx-BS-DD	Cx Design Development Services	<Building Name> A/E Basis of Design Review	\$0.00		0			
Cx-BS-DD	Cx Design Development Services	<Building Name> Energy Modeling Review	\$0.00		0			
Cx-BS-CD	Cx Construction Docs Services	<Building Name> Construction Drawing	\$0.00		0			
Cx-BS-CD	Cx Construction Docs Services	<Building Name> Cx Plan	\$0.00		0			
Cx-BS-BA	Cx Bid and Award Services	<Building Name> LEED Documentation	\$0.00		0			
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Pre-Functional Testing	\$0.00		0			15
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Functional Testing	\$0.00		0			25
Cx-BS-CA	Cx Construction Admin Services	<Building Name> 1st Report Delivery	\$0.00		0			5
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Seasonal Testing	\$0.00		0			5
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Construction Phase Final Cx Rep	\$0.00		0			7
Cx-BS-CE	Cx Construction Execution							
Cx-BS-CL	Cx Closeout Services	<Building Name> Re-Cx Plan	\$0.00		0			1
Cx-BS-CL	Cx Closeout Services	<Building Name> Owners Systems Manual	\$0.00		0			5
Cx-BS-CL	Cx Closeout Services	<Building Name> Final Commissioning Report	\$0.00		0			2
Cx-AS-PQ	Cx Post Occupancy Evaluation	<Building Name> Trend Report	\$0.00		0			1
Cx-AS-WS	Cx Warranty Services	<Building Name> Correction Period Inspection	\$0.00		0			8
Cx Additional Services								
Cx-AS-DT	Cx Demonstration and Training							
Cx-AS-WS	Cx Warranty Services							
Cx-AS-PQ	Cx Post Occupancy Evaluation							
Cx-AS-DT	Cx Other Additional Services							
Cx Reimbursable Expense								
Cx-RE-OT	Cx Other Reimbursable Expense							



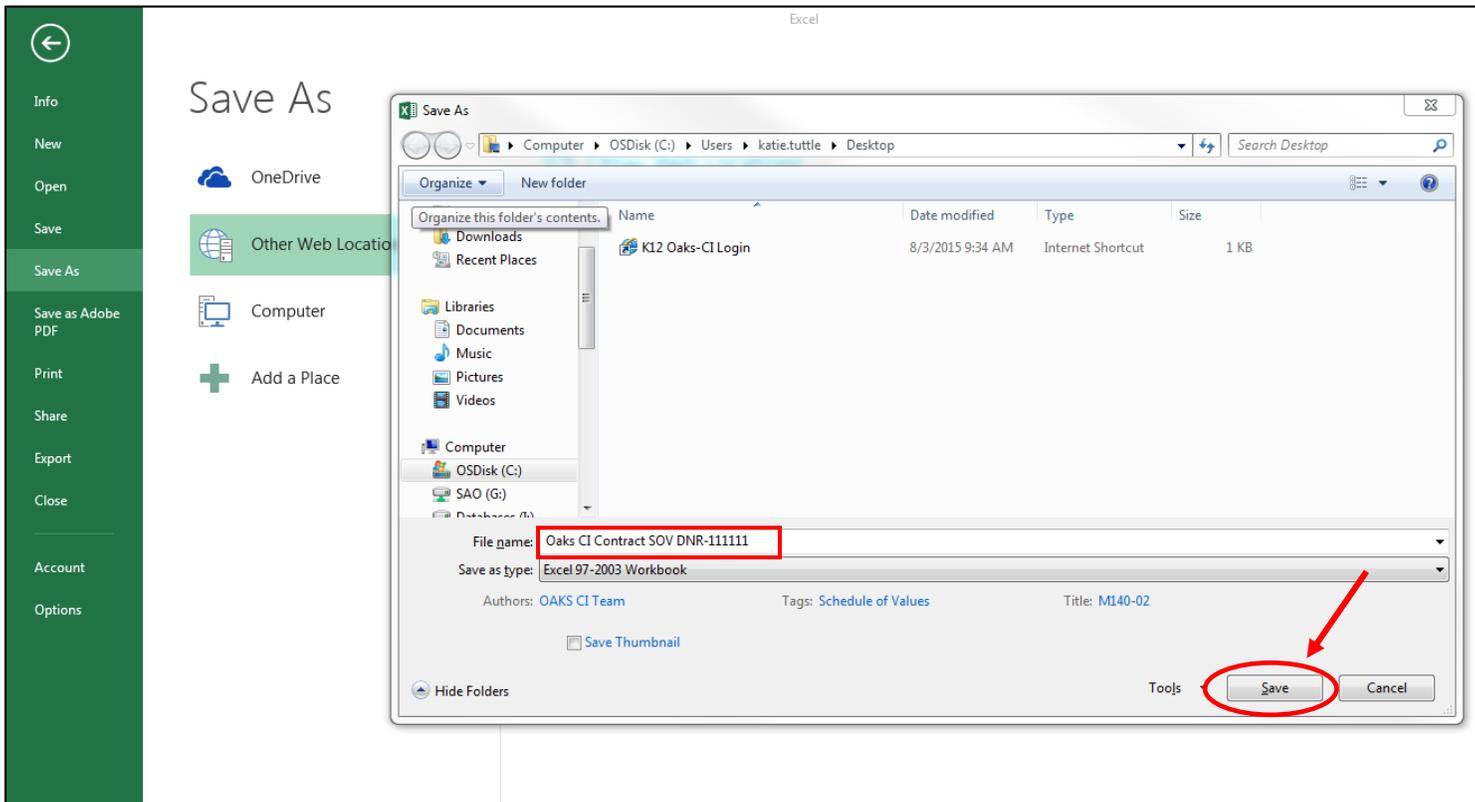
Adding Additional Lines

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



Save and Email your Spreadsheet

- ▶ **Name and Save the Spreadsheet – Very Important!**
- ▶ Email the Spreadsheet to your Project Manager and Project Coordinator for review



Contract SOV Record

- ▶ The Contract SOV record will be created by the Project Coordinator and will be sent to you for review
- ▶ You will receive an email notification that you have a Task Pending that needs your attention
- ▶ Click on the link to access your Task

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

Project/Shell: OAKS CI District Training Project 1

Contract Schedule of Values K12 SOV-008 is sent to you for Validation.

From :	Matthew Weber
Sent For :	Validation

Source Name :	OAKS CI District Training Project 1
Record No :	Contract Schedule of Values K12 SOV-008
Title :	SOV CTL Engineering

[Unifier Login](#)



Accept the Task

- ▶ Click Accept to begin reviewing the record

Contract Schedule of Values K12 - CxA SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207713?task_id=207713&parent_id=0&viewOnly=0&project_...

Contract Schedule of Values K12

Accept Decline

General Contracts SOV Details

Task Details

From
Matthew Weber

To
Matthew Weber

Sent For
Validation

General

Project Number SFC-080001	Record Number SOV-011
Project Name OAKS CI District Training Project 1	Creator Matthew Weber

Attachments Comments Linked

Information
No Attachments.



Review the Task

- a) Review the General section of the SOV
- b) Review the Contract Information section of the SOV
- c) Review Notes
- d) Review any Attachments

The screenshot displays a web application interface for reviewing a Contract Schedule of Values (SOV). The browser title is "Contract Schedule of Values K12 - CxA SOV - UI - Project No. SFC-080001 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207713/undefined?_uref=uuu714771907t3". The page title is "Contract Schedule of Values K12". There are tabs for "General" and "Contracts SOV Details". A "Send Save" button is in the top right. A red box highlights the "Attachments" tab, with a blue circle 'd' and an arrow pointing to it. The main content area is titled "Validate the EDGE and LFI information submitted in this schedule of values." and contains three sections: "General", "Contract Information", and "Notes". A blue circle 'a' is next to the "General" section, a blue circle 'b' is next to the "Contract Information" section, and a blue circle 'c' is next to the "Notes" section. The "General" section includes fields for Project Number (SFC-080001), Record Number (SOV-011), Project Name (OAKS CI District Training Project 1), Creator (Matthew Weber), Organization Name (OAKS CI District Training Project - 1), Creation Date (05/21/2020 04:08 AM (UTC-5)), Facility Name, Status (Pending), and Title (CxA SOV - UI). The "Contract Information" section includes fields for Contract No. (SFC-080001-02-01 Test), Contractor Name (Dynamix Engineering), Trade, Total Contract Amount (575,000.00), EDGE Certified Prime?, Line Item Total (\$) (575,000.00), Selection Method, and Difference (\$) (0.00). The "Notes" section is empty. On the right side, there is an "Attachments" sidebar with an "Information" icon and the text "No Attachments.".



Review the Task

- e) Click the Contract SOV Details tab
- f) Review the line items

The screenshot shows a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207713/undefined/undefined?_uref=uuu714771907t3`. The page title is "Contract Schedule of Values K12". The "General" tab is active, and the "Contracts SOV Details" sub-tab is selected, circled in red. A blue circle with the letter 'e' points to this sub-tab. Below the tabs is a table of line items, also circled in red. A blue circle with the letter 'f' points to the table. To the right of the table is a form for editing a line item, with the "Line Item Details" tab selected. The table contains the following data:

No.	WBS Code	Code Name	Short Description	Amount (\$)	LF
005	Cx-BS-PD	Cx Pre Design Services	pre design	175,000.00	
004	Cx-BS-CL	Cx Closeout Services	closeout services	100,000.00	
003	Cx-BS-CE	Cx Construction Execut...	Construction execution	150,000.00	
002	Cx-BS-CA	Cx Construction Admin ...	construction admin	50,000.00	
001	Cx-BS-BA	Cx Bid and Award Servi...	Bid and Award	100,000.00	

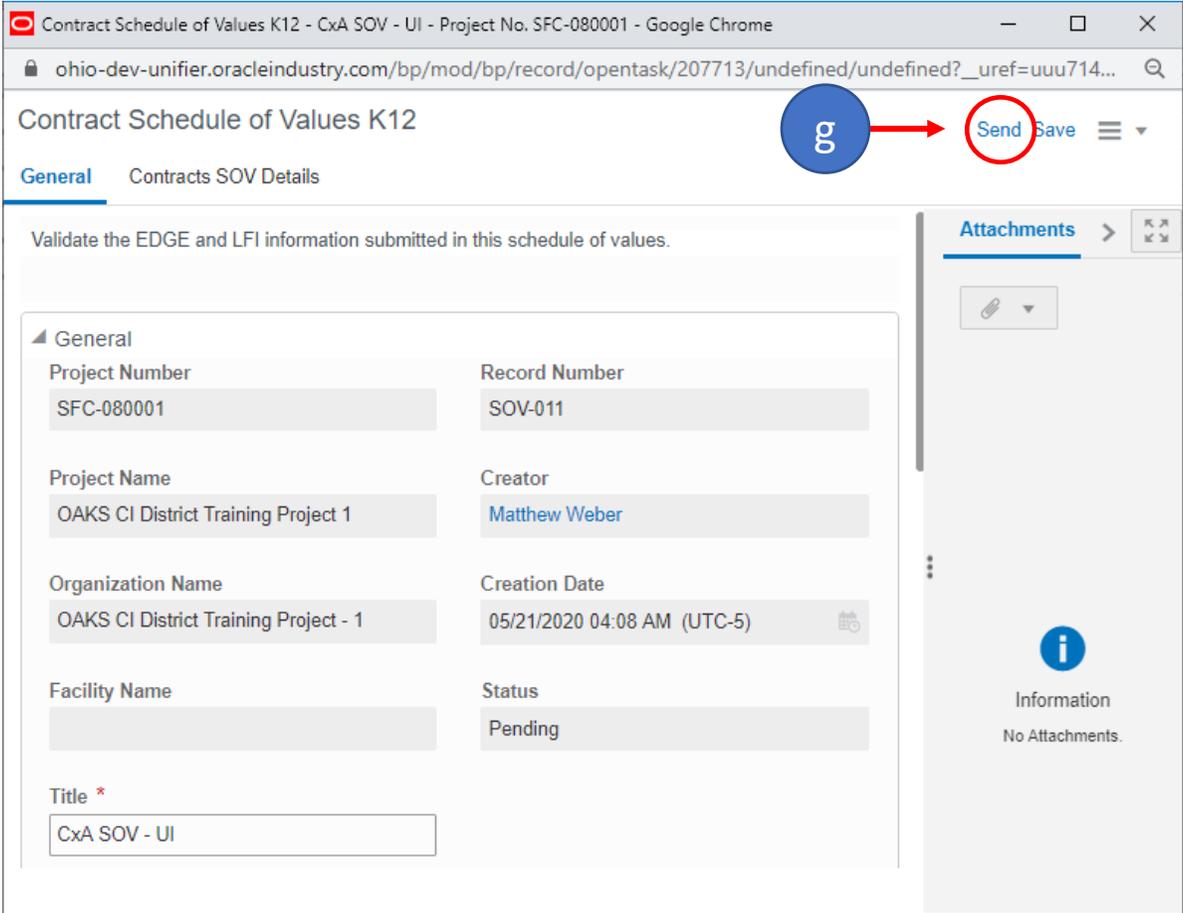
At the bottom of the table, it says "Total: 5" and "Total Amount : 575,000.00". The form on the right shows the details for the selected line item (No. 005):

- WBS Code: Cx-BS-PD
- Code Name: Cx Pre Design Services
- Short Description: pre design
- Amount (\$): 175,000.00
- Subcontractor/Supplier: Type a Subcontractor/Supplier...
- LFI Percent: 0
- District: Oak Hills Local SD
- Associated Building: Type a Name...



Review the Task

g) When the record is ready to move forward, click the **Send** button



Review the Task

h) Select the Workflow Action

- ▶ Choose **Validated** to move the record forward to the PM for Approval
- ▶ Choose **Return for Clarification** for update

i) Click **Send**

The image displays two screenshots of a web application interface for a task titled "Contract Schedule of Values K12 - CxA SOV - UI - Project No. SFC-080001".

The top screenshot shows the "Workflow Action Details" dialog box. The "Action Details" section is expanded, showing a "Workflow Actions" dropdown menu. The options "Validated" and "Return for Clarification" are visible, with "Validated" highlighted by a red box. A blue circle with the letter "h" and a red arrow points to the dropdown menu.

The bottom screenshot shows the same dialog box, but the "Workflow Actions" dropdown is now set to "Validated". The "Send For" field is populated with "PM Approval". The "To" field is populated with "Archana Atrey; Jordan Zamy; Lance Witcher; Matthew Weber; Purna Irukulapati; Rita Nichols; Sho...". The "CC" field is empty. The "Due Date Details" section is also visible, showing "Task Due Date" is not available. A blue circle with the letter "i" and a red arrow points to the "Send" button at the bottom right of the dialog box.



Requesting Payment

- ▶ Once the Contract SOV has been approved in OAKS CI, you will have the ability to create an Application for Payment
- ▶ For more information please see the [Application for Payment section of this document](#)



Contract Schedule of Values (A/E)



Contract SOV Process Overview (AE)

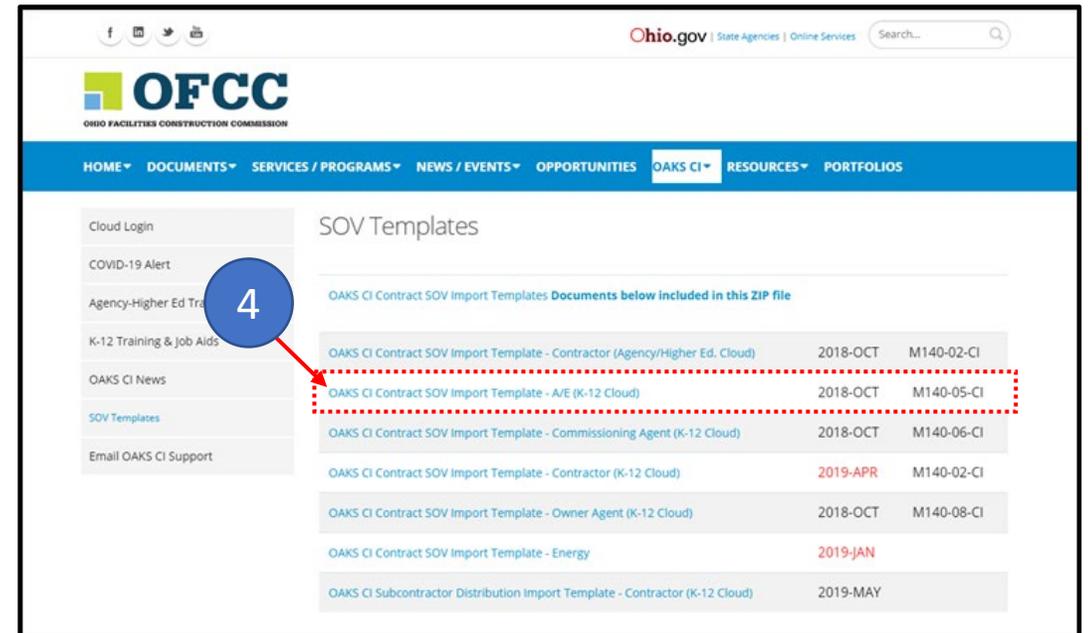
- ▶ After the Contract is approved in OAKS CI, the Contract SOV record will be created by the Project Coordinator (PC).
- ▶ The Professional Services Provider will:
 - ▶ Locate and Complete the SOV Spreadsheet
 - ▶ Email the Spreadsheet to the PC
 - ▶ Receive and Review the Contract SOV record in OAKS CI



Navigate to SOV Spreadsheet Template

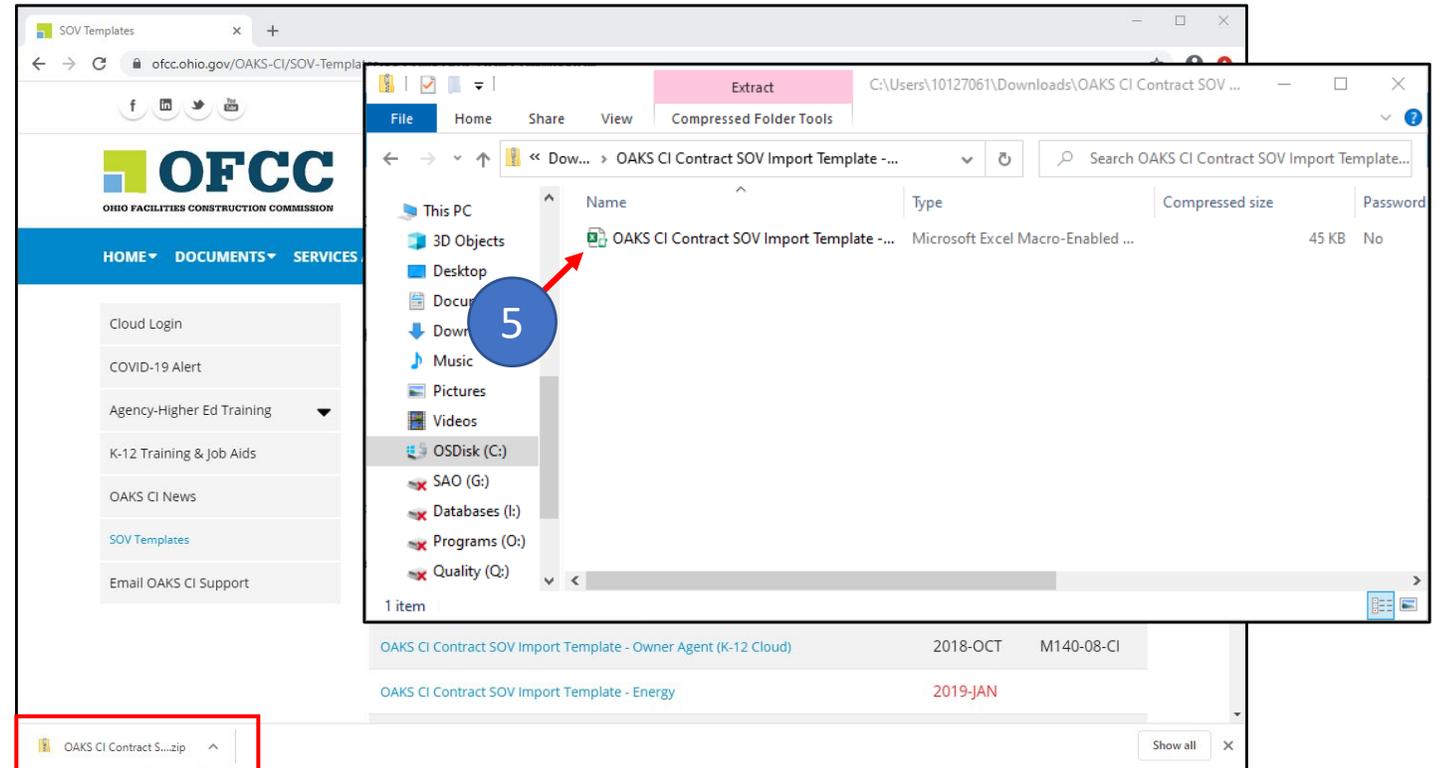
To view additional job aids and training materials for OAKS CI:

1. Navigate to ofcc.ohio.gov
2. Mouse over the OAKS CI tab
3. Click **SOV Templates**
4. Click the appropriate template to download the Excel Spreadsheet



Open SOV Spreadsheet Template

5. Open the downloaded Excel spreadsheet



Enter Contract SOV Line Items

- ▶ Enter Contract SOV Line Items
- ▶ 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

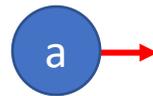
WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent	EDGE Certified Prime Contractor?	Associated Building
	AE Basic Services						
AE-BS-OM	AE Organizational Meeting Fee						
AE-BS-DS	AE Design Criteria Stage						
AE-BS-BV	AE Best Value Selection Fee						
AE-BS-PV	AE Program Verification Services						
AE-BS-SD	AE Schematic Design Services	Schematic Design	\$400.00	My Design Inc.		Yes	
AE-BS-DD	AE Design Development Services						
AE-SD-GA	AE GMP Negotiation Fee						
AE-BS-CD	AE Construction Docs Services						
AE-BS-BA	AE Bid and Award Services						
AE-BS-CN	AE Conformed Docs Services						
AE-BS-CA	AE Construction Admin Services						
AE-BS-CL	AE Closeout Services						
	AE Additional Services						
AE-AS-BC	AE Basic Commissioning						
AE-AS-TI	AE Tests and Inspections						
AE-AS-LD	AE LEED Documentation Services						
AE-AS-CH	AE Charrette Facilitation						
AE-AS-EF	AE Eco Charrette Facilitation						
AE-AS-PF	AE Partnering Facilitation						
AE-AS-SU	AE Site Surveying Services						
AE-AS-GT	AE Geotechnical Investigation						
AE-AS-EN	AE Environmental Survey						
AE-AS-HM	AE Hazardous Materials Survey						
AE-AS-MV	AE Measurement and Verification						
AE-AS-CO	AE Change Order Fees						



Adding Additional Lines

- ▶ 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

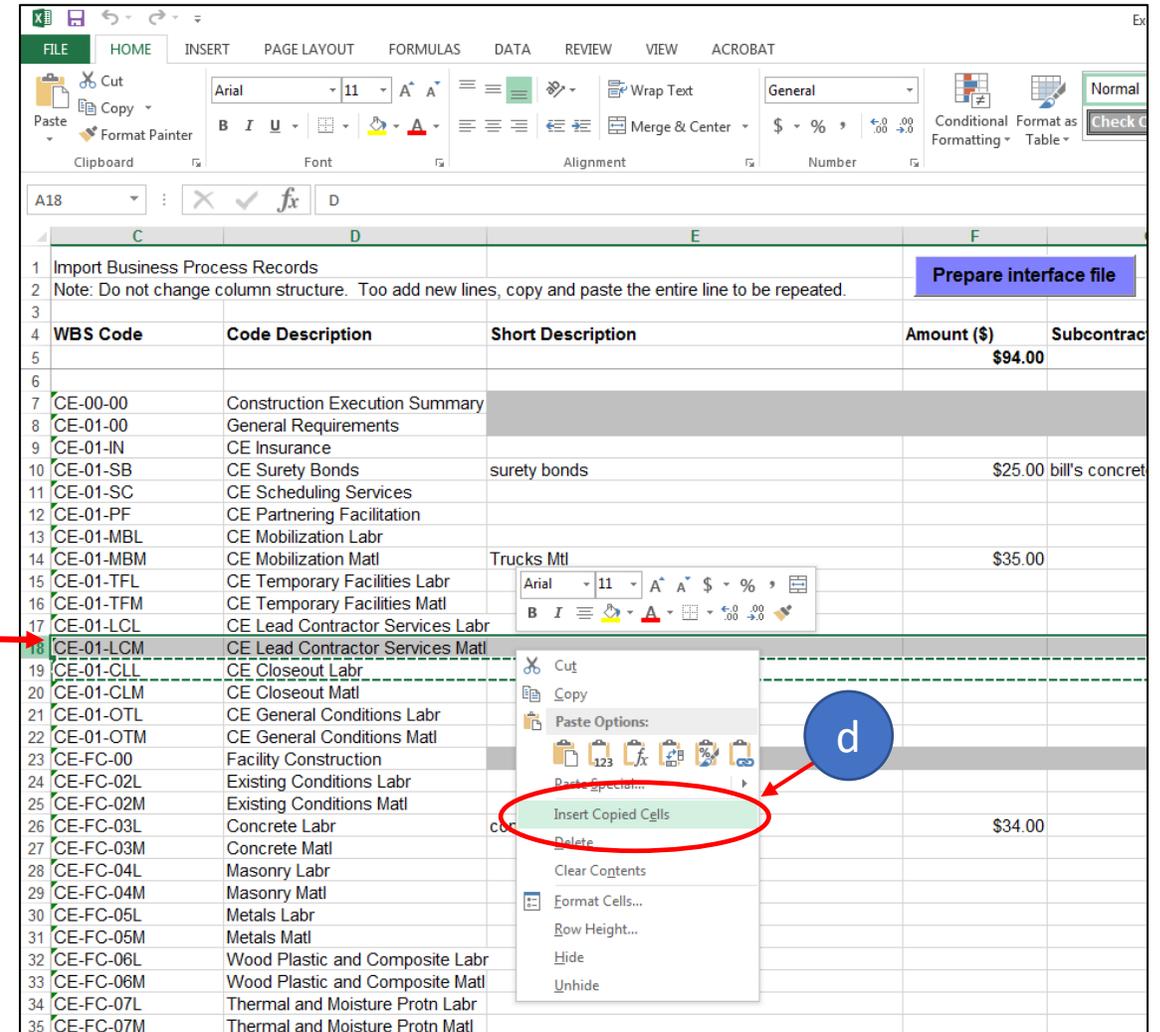


WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
			\$94.00		
CE-00-00	Construction Execution Summary				
CE-01-00	General Requirements				
CE-01-IN	CE Insurance				
CE-01-SB	CE Surety Bonds	surety bonds	\$25.00	bill's concrete	
CE-01-SC	CE Scheduling Services				
CE-01-PF	CE Partnering Facilitation				
CE-01-MBL	CE Mobilization Labr				
CE-01-MBM	CE Mobilization Matl	Trucks Mtl	\$35.00		
CE-01-TFL	CE Temporary Facilities Labr				
CE-01-TFM	CE Temporary Facilities Matl				
CE-01-LCL	CE Lead Contractor Services Labr				
CE-01-LCM	CE Lead Contractor Services Matl				
CE-01-CLL	CE Closeout Labr				
CE-01-CLM	CE Closeout Matl				
CE-01-OTL	CE General Conditions Labr				
CE-01-OTM	CE General Conditions Matl				
CE-FC-00	Facility Construction				
CE-FC-02L	Existing Conditions Labr				
CE-FC-02M	Existing Conditions Matl				
CE-FC-03L	Concrete Labr		\$34.00		
CE-FC-03M	Concrete Matl				
CE-FC-04L	Masonry Labr				
CE-FC-04M	Masonry Matl				
CE-FC-05L	Metals Labr				
CE-FC-05M	Metals Matl				
CE-FC-06L	Wood Plastic and Composite Labr				
CE-FC-06M	Wood Plastic and Composite Matl				
CE-FC-07L	Thermal and Moisture Protn Labr				
CE-FC-07M	Thermal and Moisture Protn Matl				



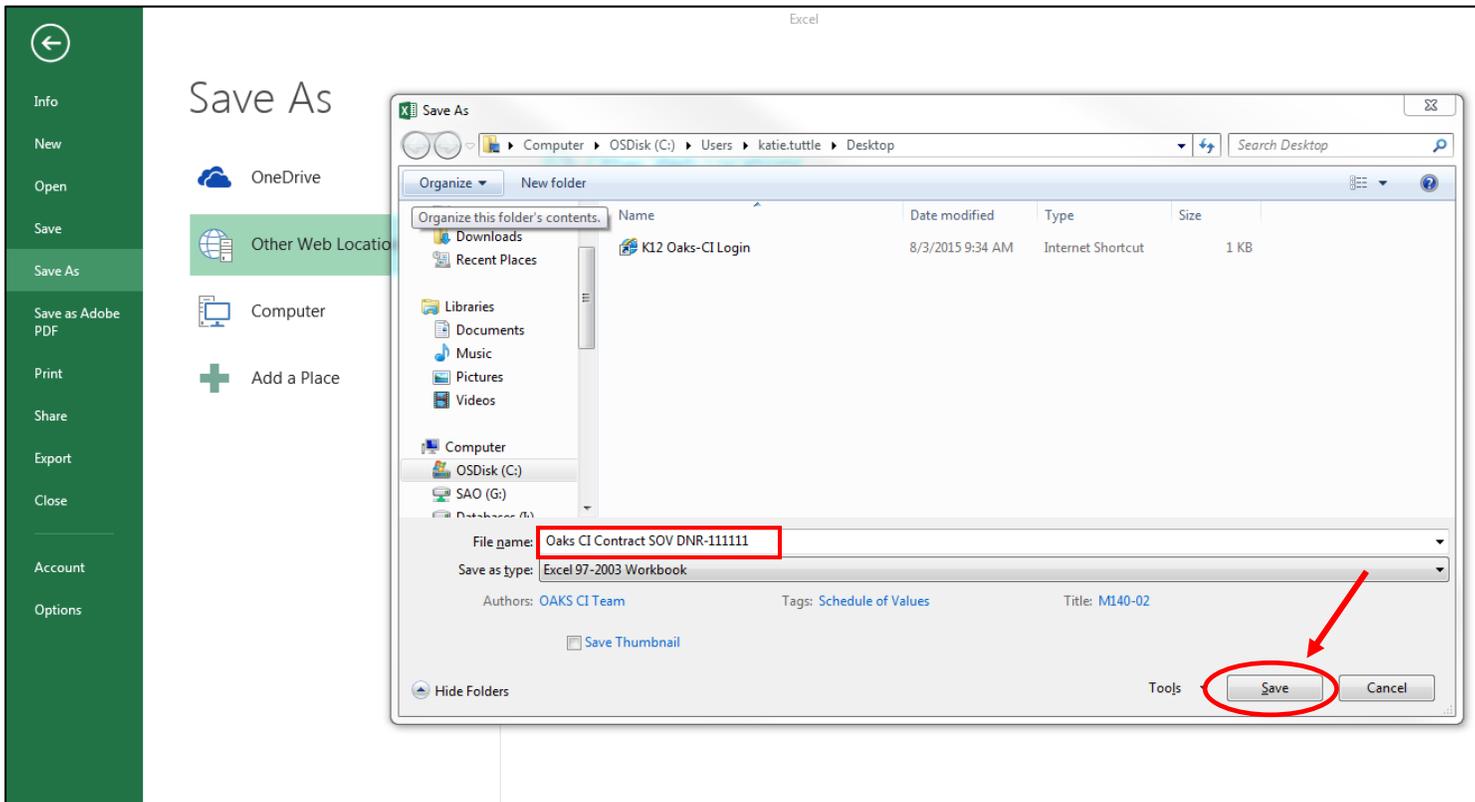
Adding Additional Lines

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



Save and Email your Spreadsheet

- ▶ **Name and Save the Spreadsheet – Very Important!**
- ▶ Email the Spreadsheet to your Project Manager and Project Coordinator for review



Contract SOV Record

- ▶ The Contract SOV record will be created by the Project Coordinator and will be sent to you for review
- ▶ You will receive an email notification that you have a Task Pending that needs your attention
- ▶ Click on the link to access your Task

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

Project/Shell: OAKS CI District Training Project 1

Contract Schedule of Values K12 SOV-008 is sent to you for Validation.

From :	Matthew Weber
Sent For :	Validation

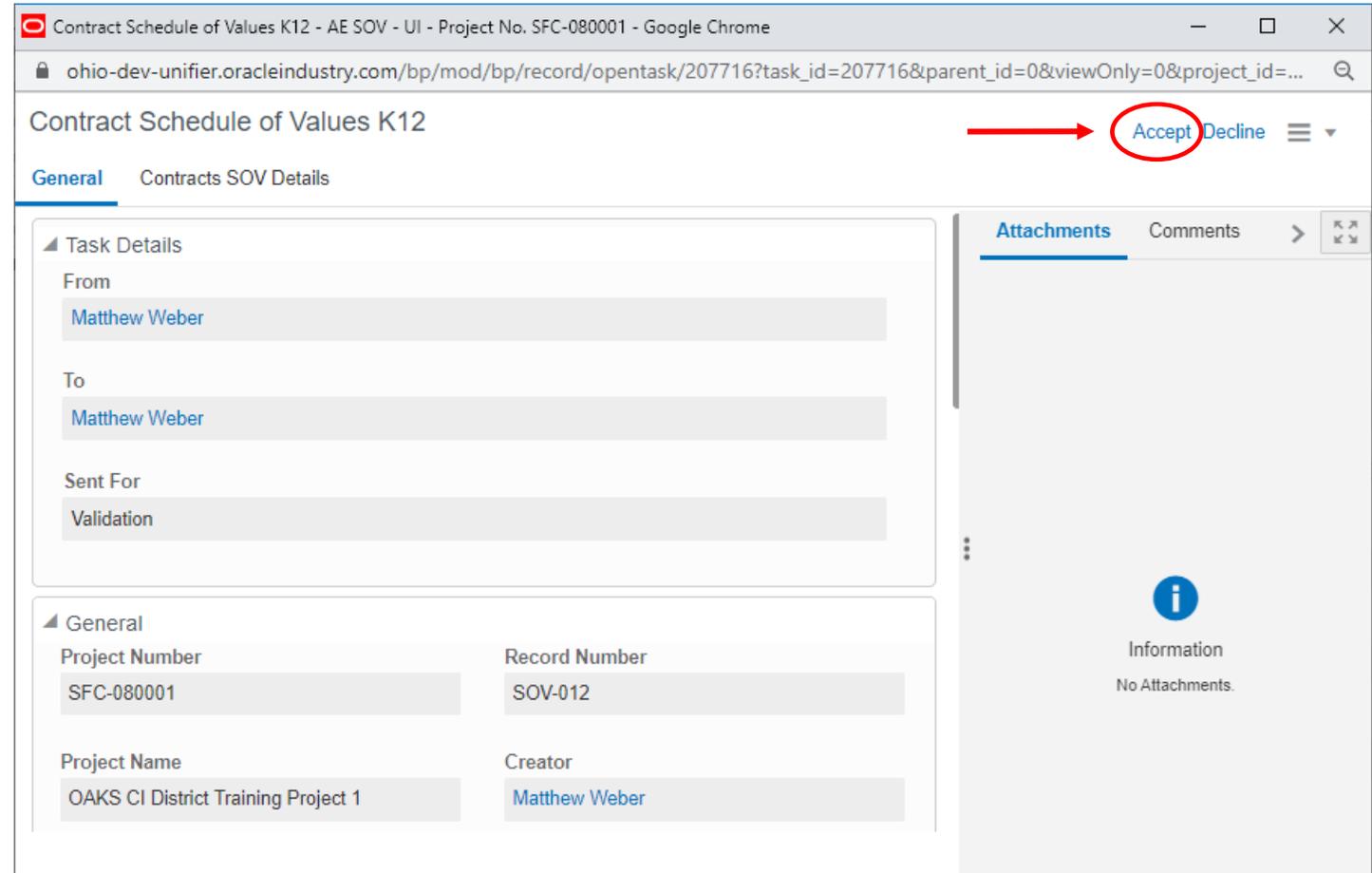
Source Name :	OAKS CI District Training Project 1
Record No :	Contract Schedule of Values K12 SOV-008
Title :	SOV CTL Engineering

[Unifier Login](#)



Accept the Task

- ▶ Click Accept to begin reviewing the record



Contract Schedule of Values K12 - AE SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207716?task_id=207716&parent_id=0&viewOnly=0&project_id=...

Contract Schedule of Values K12

Accept Decline

General Contracts SOV Details

Task Details

From
Matthew Weber

To
Matthew Weber

Sent For
Validation

General

Project Number SFC-080001	Record Number SOV-012
Project Name OAKS CI District Training Project 1	Creator Matthew Weber

Attachments Comments

Information
No Attachments.



Review the Task

- a) Review the General section of the SOV
- b) Review the Contract Information section of the SOV
- c) Review Notes
- d) Review any Attachments

The screenshot shows a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207716/undefined?_uref=uuu714771907t3`. The page title is "Contract Schedule of Values K12" and the sub-section is "Contracts SOV Details". There are "Send" and "Save" buttons in the top right. A red box highlights the "Attachments" tab, with a blue circle 'd' and an arrow pointing to it. The "General" section is expanded, showing fields for Project Number (SFC-080001), Record Number (SOV-012), Project Name (OAKS CI District Training Project 1), Creator (Matthew Weber), Organization Name (OAKS CI District Training Project - 1), Creation Date (05/21/2020 04:17 AM (UTC-5)), Facility Name, Status (Pending), and Title (AE SOV - UI). A blue circle 'a' is next to this section. The "Contract Information" section is also expanded, showing fields for Contract No. (SFC-080001-02-01 Test), Contractor Name (Dynamix Engineering), Trade, Total Contract Amount (575,000.00), EDGE Certified Prime?, Line Item Total (\$) (575,000.00), Selection Method, and Difference (\$) (0.00). A blue circle 'b' is next to this section. Below these sections is a "Notes" field, with a blue circle 'c' and an arrow pointing to it. On the right side, there is an "Information" panel with a blue circle 'i' and the text "Information No Attachments.".



Review the Task

- e) Click the Contract SOV Details tab
- f) Review the line items

The screenshot shows a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207716/undefined/undefined?_uref=uuu71477190713`. The page title is "Contract Schedule of Values K12".

Annotation 'e' points to the "Contracts SOV Details" tab in the "General" section.

Annotation 'f' points to the "Line Item Details" tab in the right-hand panel.

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI F
006	AE-RE-DP	AE Document Printing	Document Printing	75,000.00	
005	AE-AS-SU	AE Site Surveying Serv...	Site Survey	100,000.00	
004	AE-AS-TI	AE Tests and Inspections	Tests and Inspections	100,000.00	
003	AE-BS-DD	AE Design Developme...	Design Development	100,000.00	
002	AE-BS-SD	AE Schematic Design ...	Schematic Design	100,000.00	
001	AE-BS-PD	AE Pre Design Services	Pre Design	100,000.00	

Total: 6 Total Amount: 575,000.00

The right-hand panel shows the "Line Item Details" for the selected item (006). Fields include:

- WBS Code: AE-RE-DP
- Code Name: AE Document Printing
- Breakdown: (empty)
- Short Description: Document Printing
- Amount (\$): 75,000.00
- Subcontractor/Supplier: (empty)
- LFI Percent: 0
- District: Oak Hills Local SD
- Associated Building: (empty)



Review the Task

- g) When the record is ready to move forward, click the **Send** button

Contract Schedule of Values K12 - AE SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207716/undefined/undefined?_uref=uuu714771907t3

Contract Schedule of Values K12

General Contracts SOV Details

Validate the EDGE and LFI information submitted in this schedule of values.

General

Project Number	Record Number
SFC-080001	SOV-012
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project - 1	05/21/2020 04:17 AM (UTC-5)
Facility Name	Status
	Pending

Title *

AE SOV - UI

Attachments

Information

No Attachments.



Review the Task

h) Select the Workflow Action

- ▶ Choose **Validated** to move the record forward to the PM for Approval
- ▶ Choose **Return for Clarification** for update

i) Click **Send**

The image displays two screenshots of a web application interface, specifically the 'Workflow Action Details' dialog box. The top screenshot shows the 'Workflow Actions' dropdown menu with 'Validated' and 'Return for Clarification' options highlighted by a red box. A red arrow points to the 'Validated' option. The bottom screenshot shows the 'Validated' option selected in the dropdown, with the 'Send For' field set to 'PM Approval'. The 'To' field contains a list of names: Archana Atrey, Jordan Zamary, Lance Witcher, Matthew Weber, Purna Irukulapati, Rita Nichols, Sho... The 'Due Date Details' section shows 'Task Due Date' is not available. A red arrow points to the 'Send' button at the bottom right of the dialog box.

Requesting Payment

- ▶ Once the Contract SOV has been approved in OAKS CI, you will have the ability to create an Application for Payment
- ▶ For more information please see the [Application for Payment section of this document](#)



Application for Payment

Steps, Roles and Responsibilities

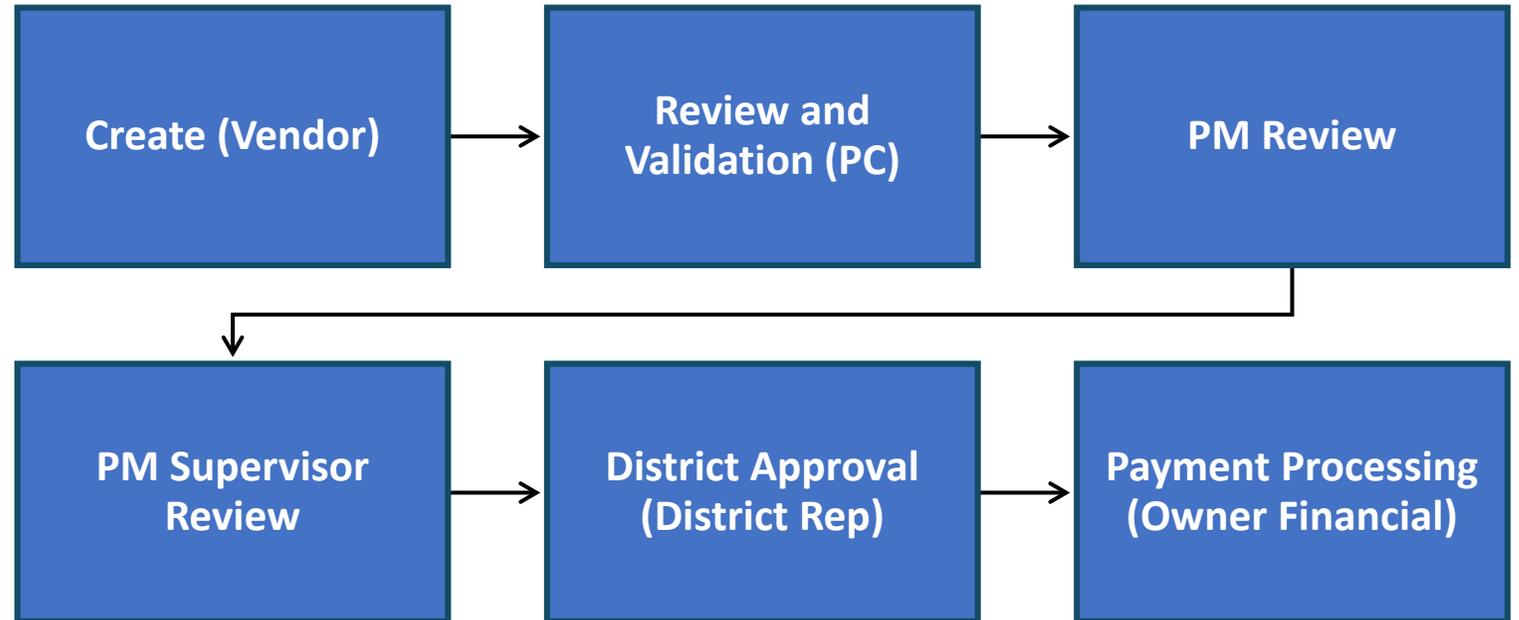
- **Contractor**
 - Creates the Pay Request record
 - Provides clarifications and updates to the Pay Request record
- **A/E**
 - Reviews and Accepts the Pay Request record
- **OA (K12)** (If no OA the PM will hold this role)
 - Reviews and recommends approval of the Pay Request record
- **Project Coordinator**
 - Reviews and validates the Pay Request record including check of compliance with Certified Payroll regulations
- **Project Manager**
 - Reviews, verifies and approves the Pay Request record
- **Project Manager Supervisor**
 - Approves the *final* Pay Request record
- **District Representative or Agency Owner**
 - Approves payment
- **District Treasurer or Agency Owner Financial**
 - Determines source of Funding
 - Creates voucher
 - Processes payment in own system of record and records payment in OAKS CI



Application for Payment

- ▶ Workflow Steps

Click the boxes to navigate directly to any section



Application for Payment – Create (Vendor)



Application for Payment Creation

- 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...> and the page title "Service Requests". The browser's address bar contains the text "uuu600419530". The page header includes several tabs: "Company Work...", "ACF Fire Protec...", "OSHP Academy...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the page header, labeled with a blue circle "a". Below the header, a search bar contains the text "DPS:". A red arrow points from a blue circle "b" to the search bar. Below the search bar, a table of projects is displayed. A red arrow points from a blue circle "c" to the first row of the table. The table has three columns: "Name", "Number", and "Location".

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
ODPS 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



Application for Payment Creation

- ▶ In OAKS CI navigate to:
 - ▶ District Level Project
 - ▶ Logs -> Application for Payment K-12
 - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier (Development)'. Below this, there are tabs for 'School Facilities' and 'OAKS CI Distric...'. A left-hand navigation menu is visible, with 'Logs' highlighted in red and a red arrow pointing to it. The main content area displays 'Applications for Payment K1' with a '+ Create' button circled in red. Below the button is a table with columns 'Title' and 'Cont'.

Title	Cont
ggg	SFC-
Architect Pay Request	SFC-
Test	SFC-
Test	SFC-
03 District Training PR 02	03 Di
03 District Training PR 01	03 Di
SFC-080001-02-01 PR 1	SFC-

Total: 7



Complete General Block

▶ Enter the required * fields

- a) Enter the **Title**
- b) Click the Select button for Contract Reference
- c) Choose Contract
- d) Click **Select**

The screenshot shows the 'Create New Applications for Payment K12' web form. The 'General' block is visible, with the following fields and values:

- Project Name: OAKS CI District Training Project 1
- Project Number: SFC-080001
- Organization Name: OAKS CI District Training Project - 1
- Facility Name: (empty)
- Title *: SFC-100056-01-P2
- Contract Reference *: SFC-080001-02-01 Test K12 SOV
- Final Payment? *: No
- Retainage Release Requested?: No
- Period From *: 09/01/2020
- Internal Ref. Number: (empty)

The 'Contract Reference' field has a 'Select' button next to it, which is annotated with 'b'. A popup window titled 'Contract Schedule of Values K12' is open, showing a table of contracts. The selected contract is 'SFC-080001-02-01 Test K12 SOV' by 'Dynamix Engineering', annotated with 'c'. The 'Select' button in the popup is annotated with 'd'.

Title	Contractor Name	Contract No.	Revised Completion Date	St
SFC-080001-02-01 Tes...	Dynamix Engineering	SFC-080001-02-01 Test		Ap
03 District Training	Dynamix Engineering	03 District Training		Ap
SFC-080001-02-01 Tes...	Dynamix Engineering	SFC-080001-02-01 Test		Ap



Complete General Block

- ▶ Enter the required * fields

d) Select Period From and Period To

e) Scroll to down to the next section

Complete the General, Certified Payroll, and Previous Pay Request blocks; then complete the Pay Request Details on the lower form by clicking Add.

General

Project Name OAKS CI District Training Project 1	Record Number
Project Number SFC-080001	Creator Matthew Weber
Organization Name OAKS CI District Training Project - 1	Creation Date
Facility Name	Status
Title * SFC-100056-01-P2	Request Date
Contract Reference * SFC-080001-02-01 Test K12 SOV	Contractor Name Dynamix Engineering
Final Payment? * No	EDGE Certified Prime?
Retainage Release Requested? No	Contract Type
Period From * 09/01/2020	Period To * 09/30/2020
Internal Ref. Number	Approval Date
	Approval Date
	Received Date

Attachments Comments

Information
No Attachments.



Previous Pay Request

- f) Select whether this is the initial pay request

If this is not your initial pay request, follow steps **g**, **h**, **i**
Very Important!

- g) Click **Select** to choose previous pay request.
- h) Choose your Previous Pay Request from list
- i) Click **Select**

The screenshot shows a web browser window with the URL 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1084/2969?_uref=uuu61367333214'. The page title is 'Create New Applications for Payment K12'. The main heading is 'Create New Applications for Payment K12'. Below the heading, there are tabs for 'General' and 'Pay Request Details'. The 'General' tab is active. The form contains several fields and sections:

- 'Initial Pay Request?' dropdown menu with 'No' selected (annotated with 'f').
- 'Previous Pay Request' dropdown menu with 'Test-2' selected (annotated with 'g').
- 'Period From' and 'Period To' date pickers, both set to '10/18/2018'.
- 'Stored Materials Summary' section with a table:

On Site Stored Materials	Payment Allowed %
0.00	92
Off Site Stored Materials	
0.00	

At the bottom right, there is an 'Information' section with a blue 'i' icon and the text 'No Attachments.'.

An inset window titled 'Applications for Payment K12' is open, showing a table of applications:

Title	Contract SOV	Contractor Name	Cc
Test-2	SFC-080001-02-01 Test K12 SOV	Dynamix Engineering	
erer	03 District Training	Dynamix Engineering	
Test K12 10/18	SFC-080001-02-01 Test K12 SOV	Dynamix Engineering	
Test K12	03 District Training	Dynamix Engineering	
999	SFC-080001-02-01 Test K12 SOV	Dynamix Engineering	
Architect Pay Request	SFC-080001-02-01 Test SOV	Dynamix Engineering	
Test	SFC-080001-02-01 Test SOV	Dynamix Engineering	
Test	SFC-080001-02-01 Test K12 SOV	Dynamix Engineering	
03 District Training P...	03 District Training	Dynamix Engineering	
03 District Training P...	03 District Training	Dynamix Engineering	

The inset window has a 'Select' button at the bottom right (annotated with 'i').

Annotations: 'h' points to the 'Applications for Payment K12' window title, 'g' points to the 'Select' button in the 'Previous Pay Request' dropdown, and 'i' points to the 'Select' button in the inset window.



Review SOV

- ▶ Prior to adding lines to your pay request, you may want to view the remaining balance on your SOV (Schedule of Values)
- ▶ At the top of the window, click **Menu -> SOV**

Create New Applications for Payment K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1084/2969?_uref=uuu613673332t4

Create New Applications for Payment K12

Send Save 

General Pay Request Details

Select your most recent, approved pay request.

For first pay request leave blank.

Initial Pay Request?
No

Previous Pay Request *
Test-2

Previous PR Vendor
Dynamix Engineering

Period From
10/18/2018

Period To
10/18/2018

Stored Materials Summary

On Site Stored Materials	Payment Allowed %
0.00	92
Off Site Stored Materials	
0.00	


Information
No Attachments.



Review SOV

- ▶ This allows you to look at the Scheduled Value and Commits Remaining Balance for each of the line items on your SOV

Schedule of Values - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/psov/view/processing?docid=0&recordid=1753&_uref=uuu613673332t4

File Edit View

Export Import Rows Split Fund Assignment

Schedule of Values

Currency: United States Dollar (USD)

Item #	Ref.	WBS Item	WBS Code	Breakdown	Scheduled Value	Commits Remaining Balance	%
000010	1	Building 1	AE-BS-CA		115,000.00	34,500.00	
000020	2	Building 2	AE-BS-CA		115,000.00	57,500.00	
000030	3	Building 3	AE-BS-CA		115,000.00	57,500.00	
000040	4	Building 4	AE-BS-CA		115,000.00	57,500.00	
000050	5	Building 5	AE-BS-CA		115,000.00	57,500.00	
				Total:	575,000.00	264,500.00	

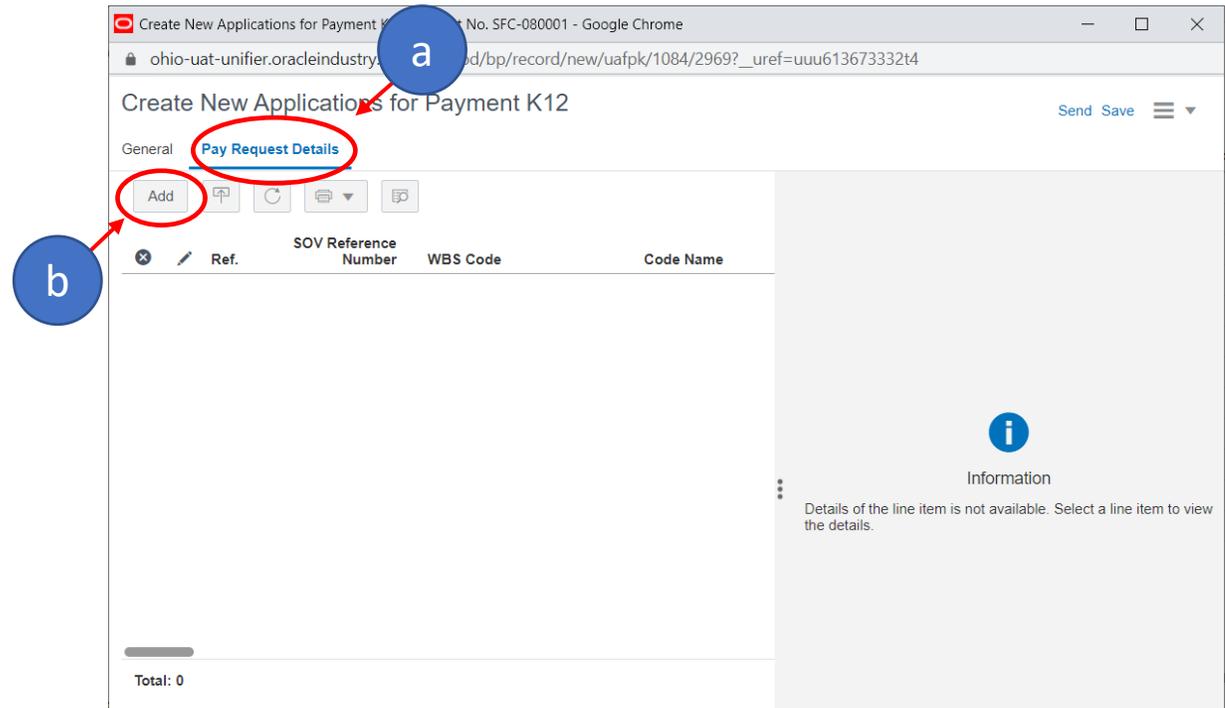
Apply OK Close



Add Line Items

- ▶ You will next enter a Line Item corresponding to each item on the Schedule of Values (SOV) from the agreement for which payment is requested:

- a) Click on the **Pay Request Details** Tab
- b) Click **Add**



Add Line Items (Contractor)

► Identify lines for completion

d) Provide **Short Description** for each line item for which payment is requested

e) Enter the **Percentage Complete** under appropriate column (Labor, Material, or Services)

f) Click **Save** once complete

Create New Applications for Payment K12

General Pay Request Details Added Purch

Cancel Error Check Save

Ref.	S... R... N...	WBS Code	Code Name	Commit Short Description	Short Description *	S...	Scheduled Value	% Labor Complete	% Materials Complete	% Services Complete
001	1	CE-FC-03L	Concrete Labr	labor - concrete	[Required]		70,000.00	25.00	0.00	0.00
002	2	CE-FC-03M	Concrete Matl	material - concrete	Concrete Material		100,000.00	0.00	25.00	0.00
003	3	CE-FC-03L	Concrete Labr	concrete labor 2	Concrete Labor		70,000.00	25.00	0.00	0.00
004	4	CE-FC-03L	Concrete Labr	concrete labor 3	Concrete Labor		70,000.00	25.00	0.00	0.00
005	5	CE-01-IN	CE Insurance	insurance	Insurance		40,000.00	0.00	0.00	50.00
TOTAL							350,000.00	75.00	25.00	50.00

Total: 5

Add Line Items (Contractor)

- ▶ Line item information displays in the **Earned Current Request** blocks in the General tab and the Pay Request Details tab
- ▶ You will need to scroll to the right to see the total on the Pay Request Details Tab
- ▶ **Current Earned and Total Amount blocks should match**

Previous Payment Allowed: 64,400.00
This Period Payment Allowed: 0.00
Current Payment Allowed: 64,400.00

Earned Current Request

Current Services	10,000.00	Current Material	25,000.00
Current Labor	0.00	Stored Materials	0.00
Current DPE/Reimb	0.00		
Current Labor Total	10,000.00	Current Materials Total	25,000.00
		Current Earned	35,000.00

Completed to Date

Services	12,500.00
----------	-----------

Previous DPE/Reimb	DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period
0.00	0.00	0.00	2,500.00	12,500.00	10,000.00
0.00	0.00	0.00	9,200.00	34,200.00	25,000.00
0.00	0.00	0.00	11,700.00	46,700.00	35,000.00

Total: 2

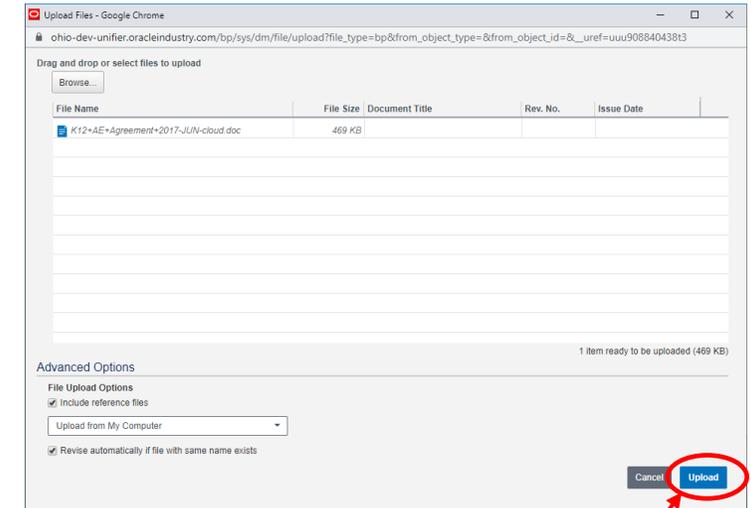
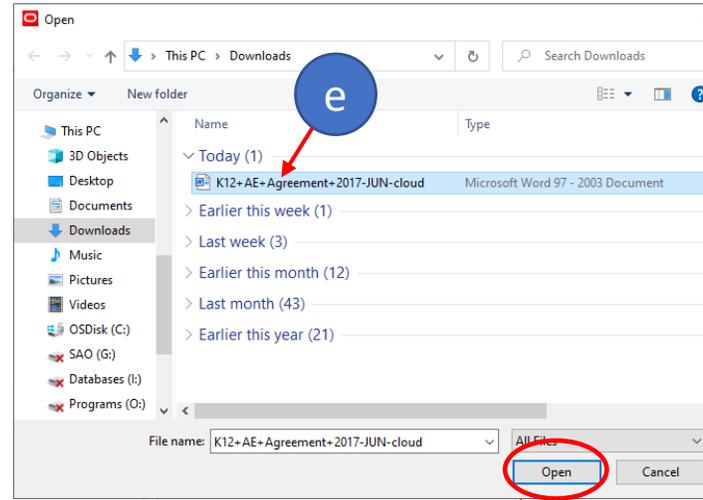
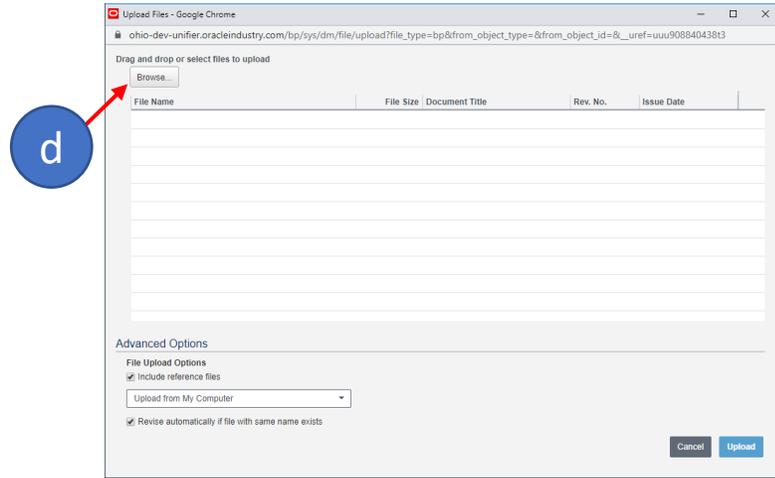
Upload and Attach Documents

▶ Upload and Attach any necessary documents:

- a) Select the **Attachments Tab**
- b) Click the **Upload Button**
- c) Select **Browse**

The screenshot shows a web browser window with the URL `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7527/1?__uref=uuu759905007t4`. The page title is "Create New Applications for Payment K12". The "General" tab is selected and circled in red. The "Attachments" tab is also circled in red. A blue circle labeled 'a' points to the "Attachments" tab. A blue circle labeled 'b' points to the "Upload" button (a blue square with a white document icon) in the Attachments section. A blue circle labeled 'c' points to the "Browse..." option in the dropdown menu that appears after clicking the upload button. The main content area shows an "Earned Current Request" table with columns for Current Services, Current Labor, Current DPE/Reimb, Current Labor Total, Current Material, Stored Materials, Current Materials Total, and Current Earned. The table contains numerical values for each row. Below the table are sections for "Completed to Date", "Retainage", "Withheld Amounts", and "Escrow Paid to Rank". On the right side, there is an "Information" section with a blue 'i' icon and the text "No Attachments."

Upload and Attach



A window will pop up to upload the files.

- d) Click Browse
- e) Select the file from your computer
- f) Click Open
- g) Click Upload

Complete Application for Payment

- ▶ When the record is ready to move forward, click **Send**

Create New Applications for Payment K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7529/1?__uref=uuu213409525t5

Create New Applications for Payment K12

General Pay Request Details

Complete the General, Certified Payroll, and Previous Pay Request blocks; then complete the Pay Request Details on the lower form by clicking Add.

General

Project Name Oak Hills Local Building Project	Record Number
Project Number SFC-080001.01	Creator Matthew Weber
Organization Name	Creation Date
Facility Name	Status
Title * Application for Payment Test	Request Date
Contract Reference * 71220-1- test	Contractor Name Joe General Contractor

Attachments Comments Linked Re...

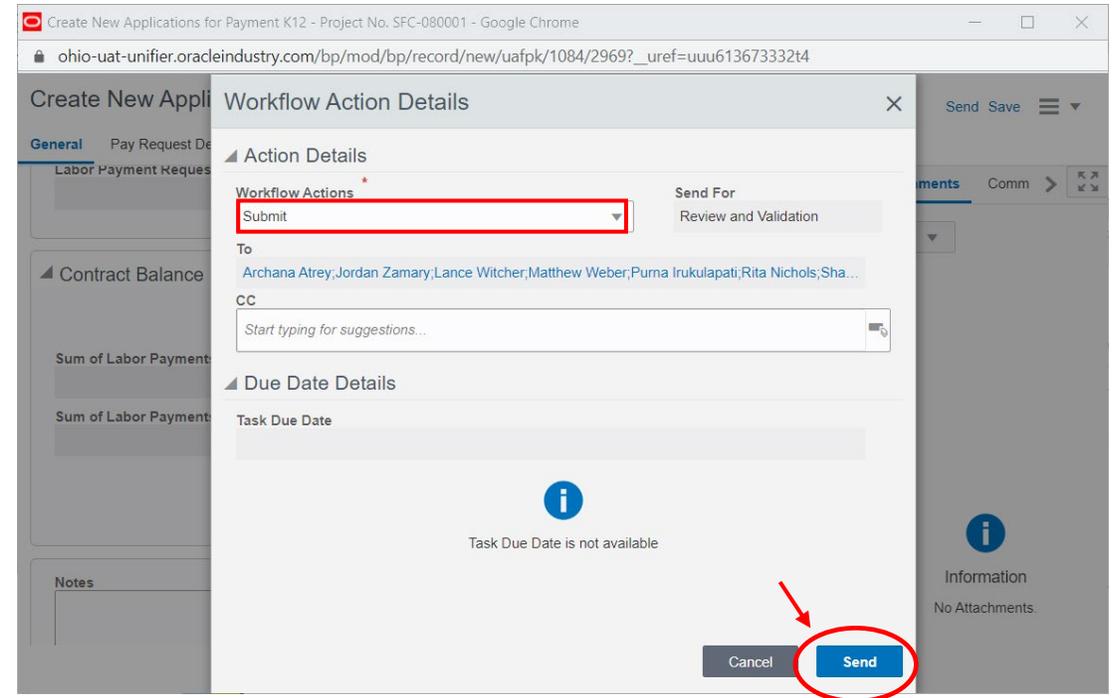
Browse...
Document Manager...

Information
No Attachments.



Complete Application for Payment

- ▶ Verify Workflow Action: **Submit**
- ▶ Click **Send**



Application for Payment – Review and Validation (PC)

Receive Task (PC)

- ▶ Vendor 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 District Training Project 1

Applications for Payment K12 PR-0012 is sent to you for Review and Validation.

From : **Matthew Weber**
Sent For : **Review and Validation**

Source Name : **OAKS CI District Training Project 1**
Record No : **Applications for Payment K12 PR-0012**
Title : **SFC-100056-01-01 P1**

[Unifier Login](#)



Accept Task (PC)

- ▶ To begin work on the record, click **Accept**

Applications for Payment K12 - SFC-100056-01-P2 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/uafpk/67/0/0?srcid=67&model=uafpk&fromcostlog=1&project_id=1084&nfl=0&_uref=uuu61367333...

Applications for Payment K12

[Accept](#) [Decline](#) ☰

General Pay Request Details Added Purchase Orders Vouchers

Task Details

From
Matthew Weber

To
Archana Atrey; Jordan Zarnary; Lance Witcher; Matthew Weber; Purma Irukulapati; Rita Nichols; Shauna Hooks; Shon Br...

Sent For
Review and Validation

General

Project Name OAKS CI District Training Project 1	Record Number PR-0013
Project Number SFC-080001	Creator Matthew Weber
Organization Name OAKS CI District Training Project - 1	Creation Date 10/14/2020 11:15 AM (UTC-8)
Facility Name	Status Pending
Title SFC-100056-01-P2	Request Date

Attachments

Comments Linked Records

i
Information
No Attachments.

PC Review and Validation

- ▶ Review the **General** tab of the record
- ▶ Check Final Payment and Retainage Release fields- If one or both are Yes, [see the slides at the end of this section](#)

The screenshot shows a web browser window displaying a 'Contractor Pay Request' record. The browser address bar shows the URL: ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436/undefined/undefined?_uref=uuu818388450t2. The record title is 'Contractor Pay Request' with 'Send Save' and a menu icon. The 'General' tab is selected and circled in red. Below it, the 'Pay Request Details' and 'Added Purchase Orders' tabs are visible. The 'General' tab contains a grid of fields:

Organization Department of Administrative Services	Record Number CPR-0018
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date 07/28/2020 09:45 PM (UTC-8)
Project Location Surface Road	Status Pending
Title Sands Decker Ltd_PR02	Request Date 03/02/2020 05:00 PM (UTC-8)
Contract Reference Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? No	EDGE Certified Prime? No
Retainage Release Requested? No	
Period From 02/01/2020 05:00 PM (UTC-8)	Period To 02/29/2020 05:00 PM (UTC-8)
Internal Ref. Number	A/E Approval Date MM/DD/YYYY HH.MM AM

On the right side of the record, there is an 'Attachments' section with a 'Comm' button and a 'No Attachments' message. An information icon is also present.

PC Review and Validation

- ▶ Check the format of the **Title** of the record- The format should include the Contract Number or Contractor Name_Pay Request Number
- ▶ Check **Period From:** and **Period To:** date, verify with Pencil Copy

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436/undefined/undefined?_uref=uuu818388450t2

Contractor Pay Request

Send Save [Menu]

General Pay Request Details Added Purchase Orders

General

Organization Department of Administrative Services	Record Number CPR-0018
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date 07/28/2020 09:45 PM (UTC-8)
Project Location Surface Road	Status Pending
Title Sands Decker Ltd_PR02	Request Date 03/02/2020 05:00 PM (UTC-8)
Contract Reference Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? No	EDGE Certified Prime? No
Retainage Release Requested? No	
Period From 02/01/2020 05:00 PM (UTC-8)	Period To 02/29/2020 05:00 PM (UTC-8)
Internal Ref. Number	A/E Approval Date MM/DD/YYYY HH.MM AM

Attachments Comm [Menu]

No Attachments.

PC Review and Validation

- a) Click the **Select** button in the Contractor Address block
- b) Choose the appropriate Project Vendor
- c) Click **Select**
- d) Check insurance Verification section, this information pulls from the Contract record
 - ▶ Ensure Commercial General Liability has not expired

The screenshot shows a web application interface for a Contractor Pay Request. It is divided into several sections: Contractor Address, Project Vendors, and Insurance Verification. Annotations a, b, c, and d highlight specific steps in the process.

Contractor Address

Contractor *
Sands Decker Ltd.

Address Line 1
60 E Spring St

Address Line 2

City
Columbus

State
Ohio

ZIP
43215

Project Vendors

OAKS Business Unit	Vendor Name	OAKS Vendor ID	Local Vendor ID	City
DOT01	Matt's Vendor	0000009876		Columbus
DOT01	OAKS Plumbing	0000061288		Columbus
DOT01	OAKS Plumbing	0000010252		Columbus
DOT01	Random Roofing and Repair	000007114		Westerville
DOT01	Sands Decker Ltd.	0000008325		Columbus

Total: 5

Cancel Select

Insurance Verification

Ensure that the "Insurance Expiration Date" is greater than or equal to "Period To Date".

General Liability Insurance Expiration Date
12/31/2009 09:00 AM (UTC-8)

Professional Liability Insurance Expiration Date

Worker's Comp Expiration Date

Notes

Contractor Name
Sands Decker Ltd.

PC Review and Validation

- Review the **Prevailing Wage** section (ensure dates match pay request)
 - Verify certified payroll reports are attached:
 - Review each payroll report submitted and verify the correct Prevailing Wage rates are being paid
 - Confirm that all subcontractors in payroll reports are declared as subcontractors in OAKS CI

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&proj...

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

▲ Prevailing Wage

Prevailing Wage Report
Sands Decker Ltd.

Pay Request Period Start: 02/21/2020 05:00 PM (UTC-8)

Pay Request Period End: 02/29/2020 05:00 PM (UTC-8)

Attachments

PC Review and Validation

Initial Pay Request?

- If this is the first pay request against the contract; Yes should be selected
- If this is not the first pay request; No should be selected
 - If this is NOT the first pay request, the Contractor should have selected their previous pay request, if no pay request has been selected or if the wrong pay request has been selected, SEND BACK TO CONTRACTOR, with General Comments requesting the fix. See [General Comments](#) section for instructions.

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&proj...

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

Previous Pay Request

Select your most recent, approved pay request.
For first pay request leave blank.

Initial Pay Request?
No

Previous Pay Request *
Sands Decker Ltd._PR01

Previous PR Vendor
Sands Decker Ltd.

Period From
02/01/2020 05:00 PM (UTC-8)

Period To
02/29/2020 05:00 PM (UTC-8)

Attachments

PC Review and Validation

- **Earned Current Request:** this information is pulled from the Pay Request Details tab
 - Take note of **Current Earned**

The screenshot shows a web browser window with the title "Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&proj...". The page title is "Contractor Pay Request" with "Send Save" and a menu icon. The "General" tab is selected, with other tabs for "Pay Request Details" and "Added Purchase Orders".

The "Earned Current Request" section is expanded, showing a table of values:

Earned Current Request	
Current Services	20,000.00
Current Labor	52,500.00
Current DPE/Reimb	0.00
Current Labor Total	72,500.00
Current Material	50,000.00
Stored Materials	0.00
Current Materials Total	50,000.00
Current Earned	122,500.00

Below the table is a section for "Completed to Date". To the right is an "Attachments" sidebar with a paperclip icon and a search field.

PC Review and Validation

- **Retainage Block:**

- IF this is the first pay request put 8% into the Retainage % field
- When the contract percent complete hits 50% or above, copy the Retainage field to the Contract Retainage Withheld field and set Retainage % back to 0

- **Withheld Amounts:**

- Withheld this period will show the Total Contract withholds, **not** only the withheld this period

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&mo...

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

Retainage

Enter 8% on the first pay request. When the contract % complete exceeds 50%, enter the actual contract retainage in the Contract Retainage Withheld field and set the Retainage % to 0.

Retainage % *	8.00	Retainage	4200.00	Contract Percent Complete	31.06
Contract Retainage Withheld	0.00	Withheld Retainage Released	0.00	Withheld Retainage Balance	4,200.00
Retainage Check Requested on	MM/DD/YYYY				

Withheld Amounts

Retainage Current Period	4,200.00				
Liens *	0.00	Liens (from Material \$)	0.00	Sum of Liens Filed	0.00
Liquidated Damages *	0.00	Liquidated Damages (from Material \$)	0.00		
Other	0.00	Other (from Material \$)	0.00		
Withheld Labor	4,200.00	Withheld Material	0.00	Withheld This Period	4,200.00

Information
No Attachments.

PC Review and Validation

- ▶ **Escrow Paid to Bank:** if the Contract Retainage Withheld is filled in, then check with the appropriate party about letter for Escrow.
 - ▶ *For additional info review your procedures for managing Escrow*

The screenshot shows a web browser window with the title "Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&mo...". The page title is "Contractor Pay Request" with "Send Save" and a menu icon. The main content area has tabs for "General", "Pay Request Details", and "Added Purchase Orders". The "General" tab is active, and the "Escrow Paid to Bank" section is highlighted with a red box. Below this section, there is a table with three columns: "Contract Retainage Escrowed", "Escrowed Retainage Released", and "Escrowed Retainage Balance". The values in the table are all 0.00. Below the table, there is a "Payment Requested" button. To the right of the main content area, there is an "Attachments" section with a "Commer" button and a right arrow. At the bottom right of the page, there is an information icon (i).

Contract Retainage Escrowed	Escrowed Retainage Released	Escrowed Retainage Balance
0.00	0.00	0.00
Lien Escrow Labor	Lien Escrow Labor Released	Lien Escrow Labor Balance
0.00	0.00	0.00
Lien Escrow Material	Lien Escrow Material Released	Lien Escrow Material Balance
0.00	0.00	0.00

PC Review and Validation

- ▶ Check the Lien BP to make sure there are no liens on the contractor. If there are liens listed for the contractor, total the amount of the liens and enter in the field “Sum of Liens Filled” in the Withheld Amount section of the pay request. Enter the sum of the liens as labor and materials in the fields “Liens” and “Liens (from Material)” to decrease the amount of the payment. The amounts you enter as labor and material cannot decrease the amount of the “Labor Payment Requested” and “Material Payment Requested” fields to a negative number.

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&pr

Contractor Pay Request

General Pay Request Details Added Purchase Orders

Withheld Amounts

Retainage Current Period 4,200.00

Liens *	Liens (from Material \$)	Sum of Liens Filled
0.00	0.00	0.00

Liquidated Damages * Liquidated Damages (from Material \$) | 0.00 || 0.00 | 0.00 | |

Other Other (from Material \$) | 0.00 || 0.00 | 0.00 | |

Withheld Labor 4,200.00 Withheld Material 0.00 | Withheld This Period 4,200.00 |

Escrow Paid to Bank

Payment Requested

Enter Previous Payment fields by copying the Sum of Labor Payments and Sum of Material Payments from the previous pay request.

Earned for Labor 72,500.00	Earned for Materials 50,000.00	
Withheld from Labor 4,200.00	Withheld from Material 0.00	
Previous Payments Labor 629.50	Previous Payment Material 207.00	Previous Payments 836.50
Escrowed Payments Labor 0.00	Escrowed Payments Material 0.00	
Labor Payment Requested 67,670.50	Material Payment Requested 49,793.00	Total Requested 117,463.50

PC Review and Validation

- ▶ Pay Request Details: Review the WBS Code and percent complete, labor should correlate with a labor column, material with material column, Services, etc.
- ▶ Ensure that DPE Reimbursable documents are attached
- ▶ Check Stored Material- get confirmation that material is stored, and certificate of insurance is attached with photos
- ▶ Check General Conditions CM Fee (if applicable)
- ▶ If you see any negative dollars earned, review record to ensure it is correct

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&model=ucpr&_uref=uuu387999349t2

Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

Ref.	SOV Ref... Nu...	WBS Code	Code Name	Commit Short Description	Short Description*	S...	Scheduled Value	% Labor Complete	% Materials Complete	% Services Complete
001	1	CE-FC-03L	Concrete Labr	labor - concrete	Concrete Labor		70,000.00	25.00	0.00	0.00
002	2	CE-FC-03M	Concrete Matl	material - concrete	Concrete Material		100,000.00	0.00	50.00	0.00
003	3	CE-FC-03L	Concrete Labr	concrete labor 2	Concrete Labor		70,000.00	25.00	0.00	0.00
004	4	CE-FC-03L	Concrete Labr	concrete labor 3	Concrete Labor		70,000.00	25.00	0.00	0.00
005	5	CE-01-IN	CE Insurance	insurance	Insurance		40,000.00	0.00	0.00	50.00
TOTAL							350,000.00	75.00	50.00	50.00

Total: 5

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&mo...

Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

Previous E/Reimb	DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period	EDGE Certified Prime Contractor?	EDGE Certified?
0.00	0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	0.00	50,000.00	50,000.00	No	
0.00	0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	0.00	20,000.00	20,000.00	No	
0.00	0.00	0.00	0.00	122,500.00	122,500.00		

Total: 5

PC Review and Validation

- ▶ **Earned Current** field (a) from the General tab will always match the **Total Amount** field (b) from the Pay Request Details tab, if it does not, check for negative earnings this period in the SOV (**Contact OAKS CI for Assistance**)
- ▶ The Total Requested (c) field, will ALWAYS equal the Current Earned minus withholds and retainage

The screenshot displays the Contractor Pay Request interface. On the left, the 'Earned Current Request' section shows a 'Current Earned' field (a) with a value of 122,500.00. In the center, a table shows the 'Earned To Date' and 'Earned This Period' columns, with the 'Earned To Date' value of 122,500.00 highlighted by callout (b). On the right, the 'Payment Requested' section shows a 'Total Requested' field (c) with a value of 117,463.50. Below the table, a summary row shows 'Total: 5' with a value of 122,500.00.

DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period
0.00	0.00	17,500.00	17,500.00
0.00	0.00	50,000.00	50,000.00
0.00	0.00	17,500.00	17,500.00
0.00	0.00	17,500.00	17,500.00
0.00	0.00	20,000.00	20,000.00

Earned Current Request	
Current Services	20,000.00
Current Labor	52,500.00
Current DPE/Reimb	0.00
Current Labor Total	72,500.00
Current Material	50,000.00
Stored Materials	0.00
Current Materials Total	50,000.00
Current Earned	122,500.00

Payment Requested			
Earned for Labor	72,500.00	Earned for Materials	50,000.00
Withheld from Labor	4,200.00	Withheld from Material	0.00
Previous Payments Labor	629.50	Previous Payment Material	207.00
Escrowed Payments Labor	0.00	Escrowed Payments Material	0.00
Labor Payment Requested	67,670.50	Material Payment Requested	49,793.00
		Total Requested	117,463.50

PC Review and Validation

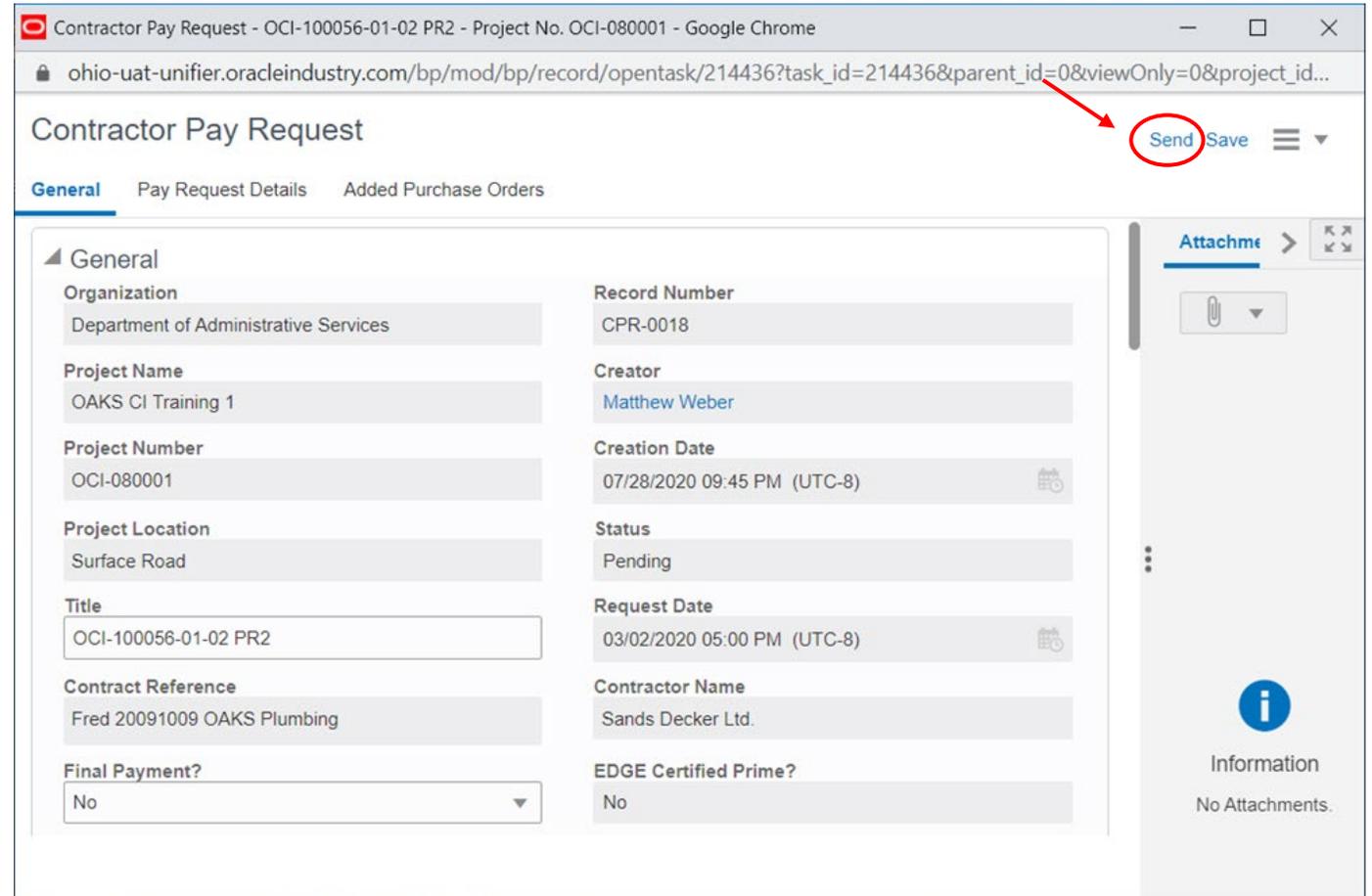
- ▶ Verify that a PO has been applied by viewing the Purchase Order information area
- ▶ If an additional PO requires attachment:
 - ▶ Click the Purchase Orders tab, Click Add
 - ▶ See instructions in this job aid for adding PO

The screenshot displays the 'Contractor Pay Request' interface in a web browser. The browser title is 'Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&model=ucpr&_uref=uuu387999...'. The page title is 'Contractor Pay Request'. There are three tabs: 'General', 'Pay Request Details', and 'Added Purchase Orders'. The 'Added Purchase Orders' tab is selected and highlighted with a red box. Below the tabs, there is an 'Add' button circled in red, and an 'Actions' dropdown menu. A table is displayed with the following columns: 'No.', 'OAKS PO No.', 'OAKS PO Amount (\$)', 'OAKS Amount Applied (\$)', and 'OAKS PO Date'. The table is currently empty. At the bottom left, it says 'Total: 0'. On the right side, there is a 'Line Item Details' panel with the following fields: 'PO No.' (OCI General 080001-05-PO), 'OAKS PO No.', 'OAKS PO Amount (\$)' (175,000.00), 'OAKS Amount Applied (\$)' (0.00), 'OAKS PO Date' (MM/DD/YYYY HH:MM AM), 'Local PO No.', 'Local PO Amount (\$)' (0.00), 'Local Amount Applied (\$)' (0.00), 'Local PO Date' (MM/DD/YYYY HH:MM AM), and 'Short Description *' (OCI General 080001-05-PO). At the bottom of the panel are 'Cancel', 'Save', and 'Save & Add New' buttons.



PC Review and Validation

- ▶ When the record is ready to move forward, click **Send**



Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id...

Contractor Pay Request

[Send](#) [Save](#) ☰

General Pay Request Details Added Purchase Orders

General	
Organization Department of Administrative Services	Record Number CPR-0018
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date 07/28/2020 09:45 PM (UTC-8)
Project Location Surface Road	Status Pending
Title OCI-100056-01-02 PR2	Request Date 03/02/2020 05:00 PM (UTC-8)
Contract Reference Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? No	EDGE Certified Prime? No

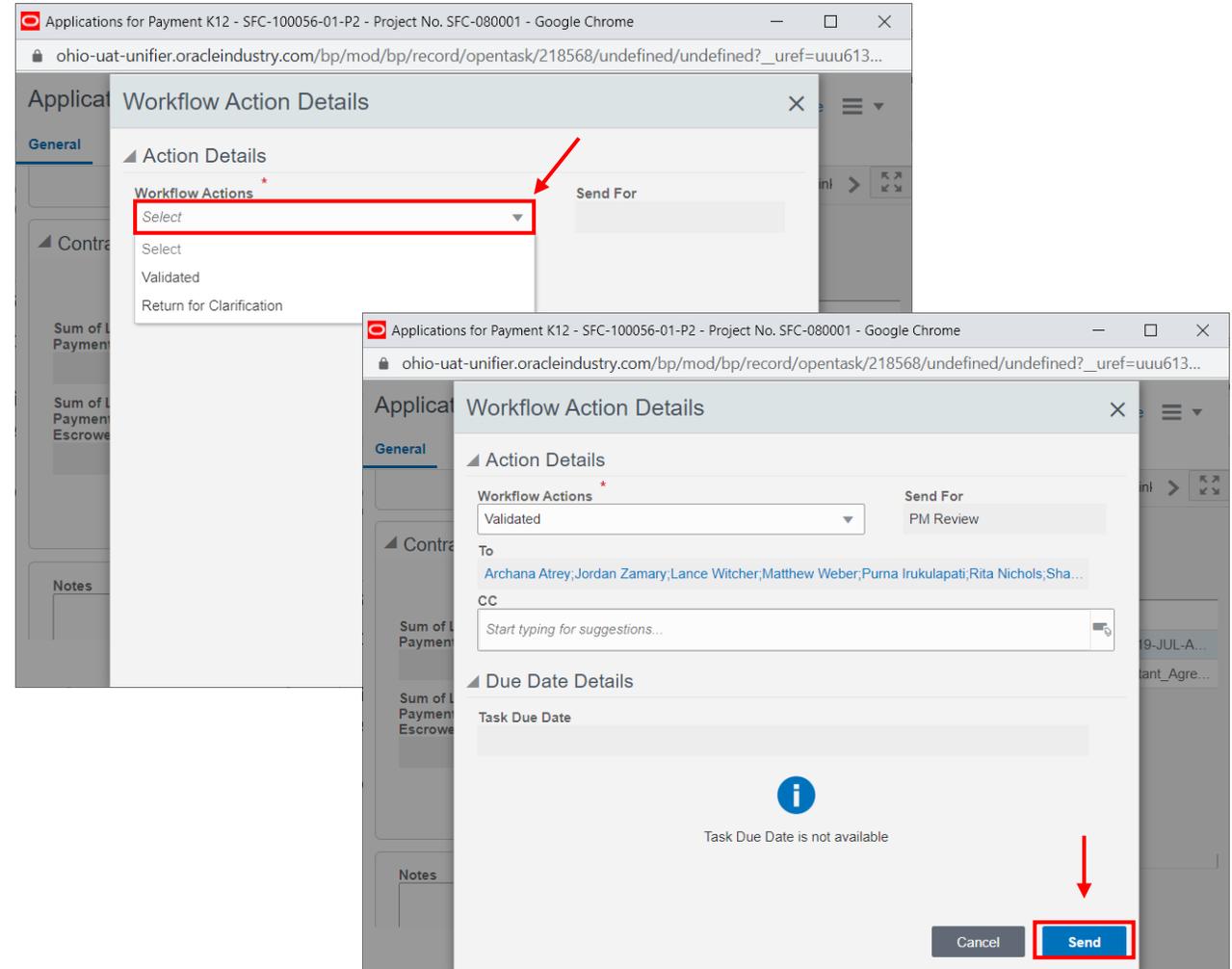
Attachments > ⌵

 ▼

i
Information
No Attachments.

PC Review and Validation

- ▶ If record must be returned for update:
 - Add a General Comment. See [General Comments](#) section for instructions.
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**
- ▶ If record is ready to move forward to PM Review:
 - ▶ Choose **Accept**
 - ▶ Click **Send**



Review Application for Payment

Final Payment

Click the General tab to view record

- ▶ **Check Final Payment field- If Yes;** ensure that the following documents are attached:
 - ▶ Certification of Contract Completion (OFCC Website – Form F390-01v0912)
 - ▶ Payment Release Affidavit (OFCC Website F390-04v0912) Signed and Notarized by Contractor

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214679/undefined/undefined?__uref=uuu387999349t2

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

General

Organization Department of Administrative Services	Record Number CPR-0018
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date 07/28/2020 09:45 PM (UTC-8)
Project Location Surface Road	Status Pending
Title * OCI-100056-01-02 PR2	Request Date * 03/02/2020 05:00 PM (UTC-8)
Contract Reference Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? * Yes	EDGE Certified Prime? No
Retainage Release Requested? No	

Attachments Comments

Information
No Attachments.

Review Application for Payment

Retainage Release-Substantial Completion

- ▶ Check Retainage Release Field- If Yes; ensure the following documents are attached:
 - ▶ Payment Release Affidavit (OFCC Website F390-04v0912) Signed and notarized by Contractor
 - ▶ Executed Substantial Completion Certification with AE's Punch list attached (OFCC Website F390-05)
 - ▶ Consent of Surety

The screenshot shows a web application interface with a 'General' tab selected. The form contains the following fields:

Organization Department of Administrative Services	Record Number CPR-0018
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date 07/28/2020 09:45 PM (UTC-8)
Project Location Surface Road	Status Pending
Title * OCI-100056-01-02 PR2	Request Date * 03/02/2020 05:00 PM (UTC-8)
Contract Reference Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? * No	EDGE Certified Prime? No
Retainage Release Requested? Yes	

On the right side of the form, there are tabs for 'Attachments' and 'Comments'. The 'Attachments' tab is active, showing a message: 'Information No Attachments.' The 'Retainage Release Requested?' field is highlighted with a red border.

Pay Applications

Required Documents During Close-Out

1) Partial Release of Retainage

Upon consent of the Contractor's Surety, the Contracting Authority may reduce the amount of funds retained for the faithful performance of Work by 50% of the amount of funds required to be retained, provided the Contractor's Surety remains responsible for all damages that may be caused due to default by the Contractor, including, but not limited to, the following:

*Completion of the Work
All interference, disruption, hindrance and delay claims/
All Liquidate Damages; and
All additional expenses incurred by the State*

Note: this should be a rare occurrence – if a request comes in via a pay application – please consult with the Project Manager before moving it forward.

a) Required Documents needed (to be attached to the pay application business process in OAKS-CI)

- i) Payment Release Affidavit (OFCC Website F390-04v0912)
- ii) Consent of Surety

2) Release of Retainage / Substantial Completion

a) Required Documents needed (to be attached to the pay application business process in OAKS-CI)

- i) Payment Release Affidavit (OFCC Website F390-04v0912)
- ii) Executed Substantial Completion Certification with AE's Punch list attached (OFCC Website F390-05)

3) Contract Completion / Final Pay Application

a) Required Documents needed (to be attached to the pay application business process in OAKS-CI)

- i) Certification of Contract Completion (OFCC Website – Form F390-01v0912)
- ii) Payment Release Affidavit (OFCC Website F390-04v0912)

4) Partial Contract Completion (to be attached to the pay application business process in OAKS-CI)

a) Required Documents needed

- i) Certificate of Contract Completion – marked partial (Form F390-01v0912) *(contract balance would still remain)*
- ii) Payment Release Affidavit (OFCC Website F390-04v0912)
- iii) Consent of Surety



Application for Payment – PM Review

Receive Task (PC)

- ▶ Vendor 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.

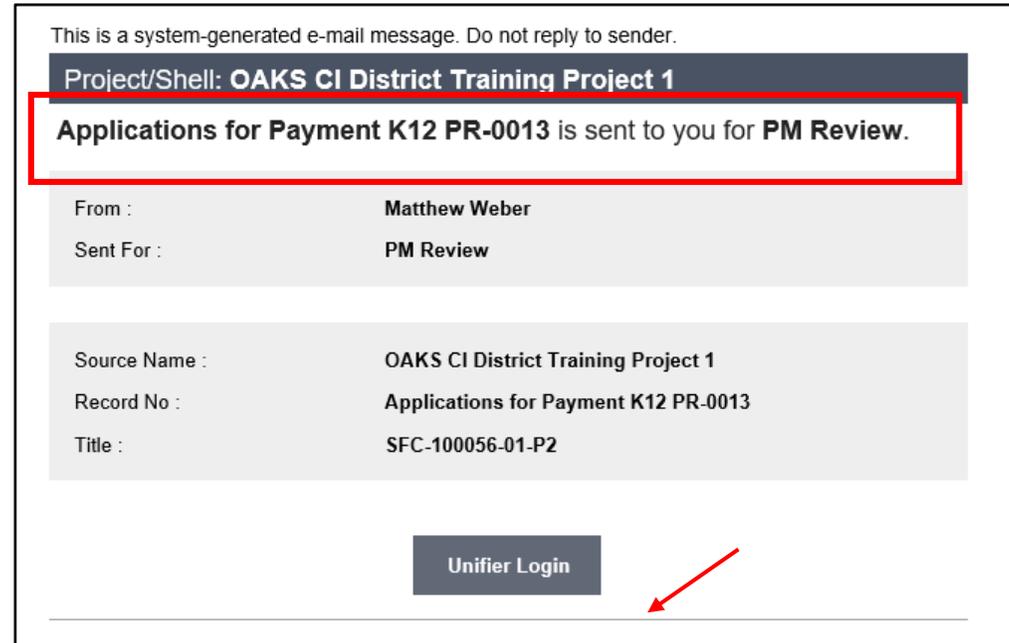
Project/Shell: OAKS CI District Training Project 1

Applications for Payment K12 PR-0013 is sent to you for PM Review.

From : Matthew Weber
Sent For : PM Review

Source Name : OAKS CI District Training Project 1
Record No : Applications for Payment K12 PR-0013
Title : SFC-100056-01-P2

[Unifier Login](#)



Accept Task (PM)

- ▶ To begin work on the record, click **Accept**

The screenshot displays the Oracle Applications for Payment K12 interface. The browser title is "Applications for Payment K12 - SFC-100056-01-P2 - Project No. SFC-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/uafpk/67/0/0?srcid=67&model=uafpk&fromcostlog=...&project_id=1084&nfl=0&_uref=...". The page title is "Applications for Payment K12". The navigation tabs are "General", "Pay Request Details", "Added Purchase Orders", and "Vouchers". The "General" tab is active. The "Task Details" section shows "From: Matthew Weber", "To: Archana Atrey;Jordan Zamy;Lance Witcher;Matthew Weber;Purna Irukulapati;Rita Nichols;Shaun...", and "Sent For: PM Review". The "General" section shows "Project Name: OAKS CI District Training Project 1", "Record Number: PR-0013", "Project Number: SFC-080001", "Creator: Matthew Weber", "Organization Name: OAKS CI District Training Project - 1", "Creation Date: 10/14/2020 11:15 AM (UTC-8)", "Facility Name", "Status: Pending", and "Request Date". The "Attachments" section shows "Published Attachments" with two items: "L110-08-CI-2019-JUL-A..." and "Signed Consultant_Agre...". The "Accept" button is circled in red, and a red arrow points to it from the top right. The "Total: 2" is displayed at the bottom of the attachments section.

PM Review

- ▶ Review the **General** tab of the record
- ▶ Check Final Payment and Retainage Release fields- If one or both are Yes, [see the slides at the end of this section](#)

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436/undefined/undefined?_uref=uuu818388450t2

Contractor Pay Request

Send Save [Menu]

General Pay Request Details Added Purchase Orders

General

Organization Department of Administrative Services	Record Number CPR-0018
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date 07/28/2020 09:45 PM (UTC-8)
Project Location Surface Road	Status Pending
Title Sands Decker Ltd_PR02	Request Date 03/02/2020 05:00 PM (UTC-8)
Contract Reference Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? No	EDGE Certified Prime? No
Retainage Release Requested? No	Period From 02/01/2020 05:00 PM (UTC-8)
Period To 02/29/2020 05:00 PM (UTC-8)	A/E Approval Date MM/DD/YYYY HH.MM AM
Internal Ref. Number	

Attachments Comm [Menu]

Information
No Attachments.

PM Review

- ▶ Check the format of the **Title** of the record- The format should include the Contract Number or Contractor Name_Pay Request Number
- ▶ Check **Period From:** and **Period To:** date, verify with Pencil Copy

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436/undefined/undefined?_uref=uuu818388450t2

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

General

Organization Department of Administrative Services	Record Number CPR-0018
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date 07/28/2020 09:45 PM (UTC-8)
Project Location Surface Road	Status Pending
Title Sands Decker Ltd_PR02	Request Date 03/02/2020 05:00 PM (UTC-8)
Contract Reference Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? No	EDGE Certified Prime? No
Retainage Release Requested? No	
Period From 02/01/2020 05:00 PM (UTC-8)	Period To 02/29/2020 05:00 PM (UTC-8)
Internal Ref. Number	A/E Approval Date MM/DD/YYYY HH.MM AM

Attachments Comm

No Attachments.

PM Review

- a) Click the **Select** button in the Contractor Address block
- b) Choose the appropriate Project Vendor
- c) Click **Select**
- d) Check insurance Verification section, this information pulls from the Contract record
 - ▶ Ensure Commercial General Liability has not expired

The screenshot shows a web application interface for a Contractor Pay Request. It is divided into several sections: Contractor Address, Project Vendors, and Insurance Verification. Annotations a, b, c, and d highlight specific steps in the process.

Contractor Address Section:

- Annotation **a** points to a dropdown menu for the Contractor, which is currently set to "Sands Decker Ltd.".
- Annotation **b** points to a "Select" button located to the right of the Contractor dropdown.

Project Vendors Section:

OAKS Business Unit	Vendor Name	OAKS Vendor ID	Local Vendor ID	City
DOT01	Matt's Vendor	0000009876		Columbus
DOT01	OAKS Plumbing	0000061288		Columbus
DOT01	OAKS Plumbing	0000010252		Columbus
DOT01	Random Roofing and Repair	000007114		Westerville
DOT01	Sands Decker Ltd.	0000008325		Columbus

Annotation **c** points to the "Select" button at the bottom right of the Project Vendors modal.

Insurance Verification Section:

- Annotation **d** points to the "General Liability Insurance Expiration Date" field, which is highlighted with a red box and contains the value "12/31/2009 09:00 AM (UTC-8)".

Other visible fields in the Insurance Verification section include Professional Liability Insurance Expiration Date, Worker's Comp Expiration Date, and Notes. The Contractor Name is listed as "Sands Decker Ltd.".

PM Review

- Review the **Prevailing Wage** section (ensure dates match pay request)
 - Verify certified payroll reports are attached:
 - Review each payroll report submitted and verify the correct Prevailing Wage rates are being paid
 - Confirm that all subcontractors in payroll reports are declared as subcontractors in OAKS CI

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&proj...

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

▲ Prevailing Wage

Prevailing Wage Report

Sands Decker Ltd.

Pay Request Period Start 02/21/2020 05:00 PM (UTC-8)

Pay Request Period End 02/29/2020 05:00 PM (UTC-8)

Attachments

PM Review

Initial Pay Request?

- If this is the first pay request against the contract; Yes should be selected
- If this is not the first pay request; No should be selected
 - If this is NOT the first pay request, the Contractor should have selected their previous pay request, if no pay request has been selected or if the wrong pay request has been selected, SEND BACK TO CONTRACTOR, with General Comments requesting the fix. See [General Comments](#) section for instructions.

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&proj...

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

Previous Pay Request

Select your most recent, approved pay request.

For first pay request leave blank.

Initial Pay Request?
No

Previous Pay Request *
Sands Decker Ltd._PR01

Previous PR Vendor
Sands Decker Ltd.

Period From
02/01/2020 05:00 PM (UTC-8)

Period To
02/29/2020 05:00 PM (UTC-8)

Attachments

PM Review

- **Earned Current Request:** this information is pulled from the Pay Request Details tab
 - Take note of **Current Earned**

The screenshot shows a web browser window with the title "Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&proj...". The page title is "Contractor Pay Request" with "Send Save" and a menu icon. The navigation tabs are "General", "Pay Request Details", and "Added Purchase Orders". The "General" tab is active, showing a summary of the "Earned Current Request".

Earned Current Request	
Current Services	20,000.00
Current Labor	52,500.00
Current DPE/Reimb	0.00
Current Labor Total	72,500.00
Current Material	50,000.00
Stored Materials	0.00
Current Materials Total	50,000.00
Current Earned	122,500.00

Below the summary is a section for "Completed to Date". On the right side, there is an "Attachments" panel with a paperclip icon and a search field. An information icon is visible at the bottom right of the page.

PM Review

- **Retainage Block:**

- IF this is the first pay request put 8% into the Retainage % field
- When the contract percent complete hits 50% or above, copy the Retainage field to the Contract Retainage Withheld field and set Retainage % back to 0

- **Withheld Amounts:**

- Withheld this period will show the Total Contract withholds, **not** only the withheld this period

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&mo...

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

Retainage

Enter 8% on the first pay request. When the contract % complete exceeds 50%, enter the actual contract retainage in the Contract Retainage Withheld field and set the Retainage % to 0.

Retainage % *	8.00	Retainage	4200.00	Contract Percent Complete	31.06
Contract Retainage Withheld	0.00	Withheld Retainage Released	0.00	Withheld Retainage Balance	4,200.00

Retainage Check Requested on MM/DD/YYYY

Withheld Amounts

Retainage Current Period	4,200.00	Liens *	0.00	Liens (from Material \$)	0.00	Sum of Liens Filed	0.00
		Liquidated Damages *	0.00	Liquidated Damages (from Material \$)	0.00		
		Other	0.00	Other (from Material \$)	0.00		
Withheld Labor	4,200.00	Withheld Material	0.00	Withheld This Period	4,200.00		

Attachments

Information

No Attachments.

PM Review

- ▶ **Escrow Paid to Bank:** if the Contract Retainage Withheld is filled in, then check with the appropriate party about letter for Escrow.
 - ▶ *For additional info review your procedures for managing Escrow*

The screenshot shows a web browser window with the title "Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&mo...". The page title is "Contractor Pay Request" with "Send Save" and a menu icon. The main content area has tabs for "General", "Pay Request Details", and "Added Purchase Orders". The "General" tab is active, and the "Escrow Paid to Bank" section is highlighted with a red box. Below this section, there are three columns of input fields for "Contract Retainage Escrowed", "Escrowed Retainage Released", and "Escrowed Retainage Balance", each with a value of 0.00. Below these are three rows for "Lien Escrow Labor" and "Lien Escrow Material", each with "Released" and "Balance" sub-fields, all with 0.00 values. A "Payment Requested" button is at the bottom. On the right, there is an "Attachments" section with a "Commer" button and a scrollable area. An information icon is at the bottom right of the form.

Escrow Paid to Bank		
Contract Retainage Escrowed	Escrowed Retainage Released	Escrowed Retainage Balance
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Lien Escrow Labor	Lien Escrow Labor Released	Lien Escrow Labor Balance
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Lien Escrow Material	Lien Escrow Material Released	Lien Escrow Material Balance
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

▶ Payment Requested

PM Review

- ▶ Check the Lien BP to make sure there are no liens on the contractor. If there are liens listed for the contractor, total the amount of the liens and enter in the field “Sum of Liens Filled” in the Withheld Amount section of the pay request. Enter the sum of the liens as labor and materials in the fields “Liens” and “Liens (from Material)” to decrease the amount of the payment. The amounts you enter as labor and material cannot decrease the amount of the “Labor Payment Requested” and “Material Payment Requested” fields to a negative number.

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&pr

Contractor Pay Request

General Pay Request Details Added Purchase Orders

▲ Withheld Amounts

Retainage Current Period	4,200.00	
Liens *	Liens (from Material \$)	Sum of Liens Filled
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Liquidated Damages *	Liquidated Damages (from Material \$)	
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	
Other	Other (from Material \$)	
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	
Withheld Labor	Withheld Material	Withheld This Period
4,200.00	0.00	4,200.00

▶ Escrow Paid to Bank

▲ Payment Requested

Enter Previous Payment fields by copying the Sum of Labor Payments and Sum of Material Payments from the previous pay request.

Earned for Labor	Earned for Materials	
72,500.00	50,000.00	
Withheld from Labor	Withheld from Material	
4,200.00	0.00	
Previous Payments Labor	Previous Payment Material	Previous Payments
<input type="text" value="629.50"/>	<input type="text" value="207.00"/>	836.50
Escrowed Payments Labor	Escrowed Payments Material	
0.00	0.00	
Labor Payment Requested	Material Payment Requested	Total Requested
67,670.50	49,793.00	117,463.50

PM Review

- ▶ Pay Request Details: Review the WBS Code and percent complete, labor should correlate with a labor column, material with material column, Services, etc.
- ▶ Ensure that DPE Reimbursable documents are attached
- ▶ Check Stored Material- get confirmation that material is stored, and certificate of insurance is attached with photos
- ▶ Check General Conditions CM Fee (if applicable)
- ▶ If you see any negative dollars earned, review record to ensure it is correct

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&model=ucpr&_uref=uuu387999349t2

Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

Ref.	SOV Ref... Nu...	WBS Code	Code Name	Commit Short Description	Short Description*	S...	Scheduled Value	% Labor Complete	% Materials Complete	% Services Complete
001	1	CE-FC-03L	Concrete Labr	labor - concrete	Concrete Labor		70,000.00	25.00	0.00	0.00
002	2	CE-FC-03M	Concrete Matl	material - concrete	Concrete Material		100,000.00	0.00	50.00	0.00
003	3	CE-FC-03L	Concrete Labr	concrete labor 2	Concrete Labor		70,000.00	25.00	0.00	0.00
004	4	CE-FC-03L	Concrete Labr	concrete labor 3	Concrete Labor		70,000.00	25.00	0.00	0.00
005	5	CE-01-IN	CE Insurance	insurance	Insurance		40,000.00	0.00	0.00	50.00
TOTAL							350,000.00	75.00	50.00	50.00

Total: 5

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&mo...

Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

Previous E/Reimb	DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period	EDGE Certified Prime Contractor?	EDGE Certified?
0.00	0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	0.00	50,000.00	50,000.00	No	
0.00	0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	0.00	20,000.00	20,000.00	No	
0.00	0.00	0.00	0.00	122,500.00	122,500.00		

Total: 5

PM Review

- ▶ **Earned Current** field (a) from the General tab will always match the **Total Amount** field (b) from the Pay Request Details tab, if it does not, check for negative earnings this period in the SOV (**Contact OAKS CI for Assistance**)
- ▶ The Total Requested (c) field, will ALWAYS equal the Current Earned minus withholds and retainage

The screenshot displays the Contractor Pay Request interface. On the left, the 'Earned Current Request' section shows various categories with values, and the 'Current Earned' field is highlighted with a red box and labeled 'a'. In the center, a table shows 'Earned To Date' and 'Earned This Period' columns, with the '122,500.00' value in the 'Earned This Period' column highlighted by a red box and labeled 'b'. On the right, the 'Payment Requested' section shows a summary table where the 'Total Requested' value of 117,463.50 is highlighted with a red box and labeled 'c'.

DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period
0.00	0.00	17,500.00	17,500.00
0.00	0.00	50,000.00	50,000.00
0.00	0.00	17,500.00	17,500.00
0.00	0.00	17,500.00	17,500.00
0.00	0.00	20,000.00	20,000.00

Earned Current Request		Payment Requested	
Current Services	20,000.00	Labor Payment Requested	67,670.50
Current Labor	52,500.00	Material Payment Requested	49,793.00
Current DPE/Reimb	0.00	Total Requested	117,463.50
Current Labor Total	72,500.00		
Current Materials Total	50,000.00		
Current Earned	122,500.00		

PM Review

- ▶ Verify that a PO has been applied by viewing the Purchase Order information area
- ▶ If an additional PO requires attachment:
 - ▶ Click the Purchase Orders tab, Click Add
 - ▶ See instructions in this job aid for adding PO

The screenshot shows a web application interface for a Contractor Pay Request. At the top, there are tabs for 'General', 'Pay Request Details', and 'Added Purchase Orders'. The 'Added Purchase Orders' tab is highlighted with a red box. Below the tabs is a table with columns: 'No.', 'OAKS PO No.', 'OAKS PO Amount (\$)', 'OAKS Amount Applied (\$)', and 'OAKS PO Date'. The table is currently empty, and a red arrow points to an 'Add' button located to the left of the table. To the right of the table is a 'Line Item Details' panel with fields for 'PO No.', 'OAKS PO No.', 'OAKS PO Amount (\$)', 'OAKS Amount Applied (\$)', 'OAKS PO Date', 'Local PO No.', 'Local PO Amount (\$)', 'Local Amount Applied (\$)', and 'Local PO Date'. The 'OAKS PO Amount (\$)' field is populated with '175,000.00'. At the bottom of the table, it says 'Total: 0'. At the bottom of the 'Line Item Details' panel, there are 'Cancel', 'Save', and 'Save & Add New' buttons.

PM Review

- ▶ When the record is ready to move forward, click **Send**

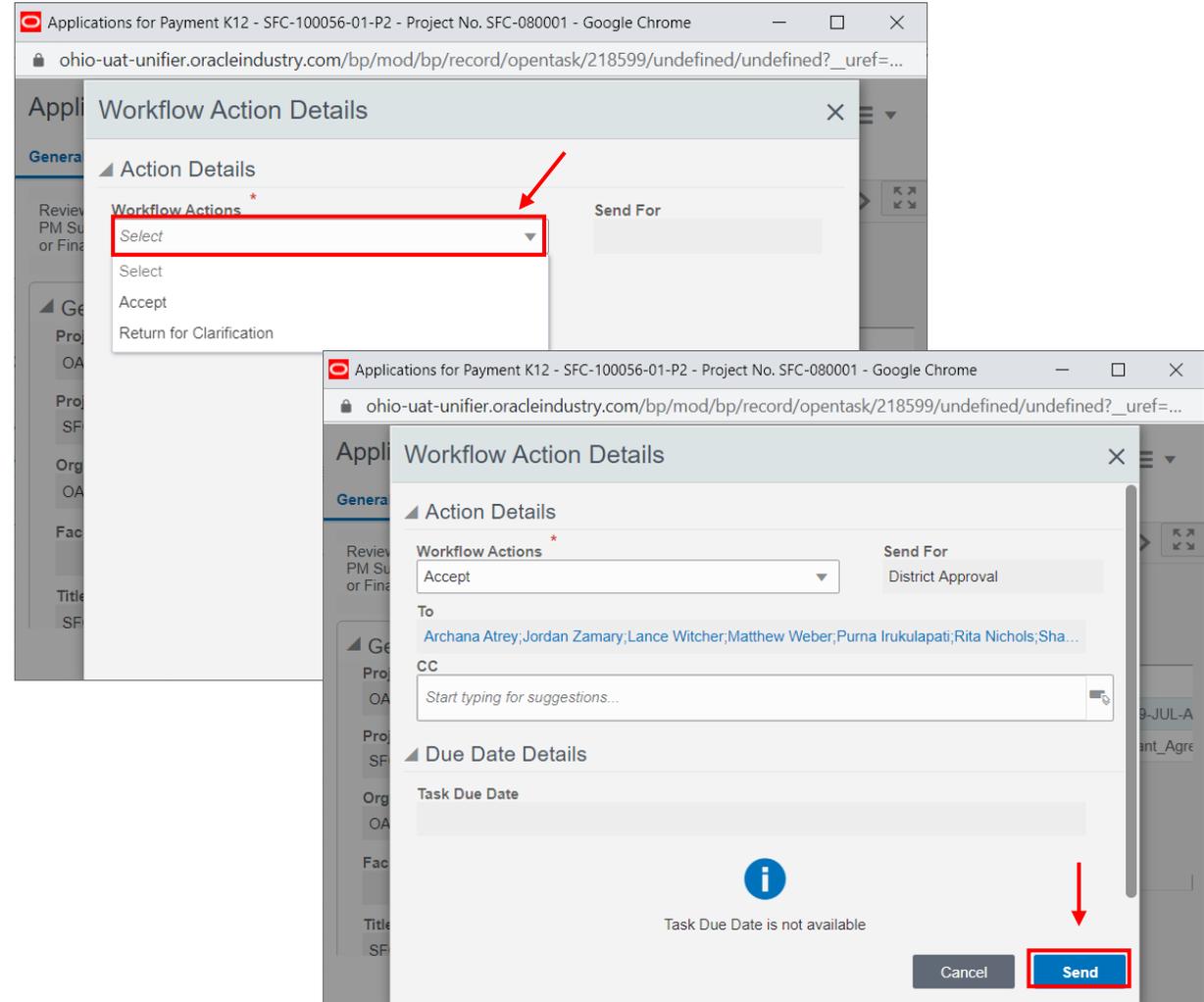
The screenshot shows a web browser window with the title "Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id...". The page title is "Contractor Pay Request". In the top right corner, there are buttons for "Send", "Save", and a menu icon. The "Send" button is circled in red, and a red arrow points to it from the right. Below the title, there are tabs for "General", "Pay Request Details", and "Added Purchase Orders". The "General" tab is active. The form contains the following fields:

General	
Organization	Department of Administrative Services
Record Number	CPR-0018
Project Name	OAKS CI Training 1
Creator	Matthew Weber
Project Number	OCI-080001
Creation Date	07/28/2020 09:45 PM (UTC-8)
Project Location	Surface Road
Status	Pending
Title	OCI-100056-01-02 PR2
Request Date	03/02/2020 05:00 PM (UTC-8)
Contract Reference	Fred 20091009 OAKS Plumbing
Contractor Name	Sands Decker Ltd.
Final Payment?	No
EDGE Certified Prime?	No

On the right side of the form, there is an "Attachments" section with a plus icon and a dropdown menu. Below that is an "Information" section with an information icon and the text "No Attachments."

PM Review

- ▶ If record must be returned for update:
 - Add a General Comment. See [General Comments](#) section for instructions.
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**
- ▶ If record is ready to move forward to District Approval:
 - ▶ Choose **Accept**
 - ▶ Click **Send**



Review Application for Payment

Final Payment

Click the General tab to view record

- ▶ **Check Final Payment field- If Yes;** ensure that the following documents are attached:
 - ▶ Certification of Contract Completion (OFCC Website – Form F390-01v0912)
 - ▶ Payment Release Affidavit (OFCC Website F390-04v0912) Signed and Notarized by Contractor

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214679/undefined/undefined?__uref=uuu387999349t2

Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

General

Organization Department of Administrative Services	Record Number CPR-0018
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date 07/28/2020 09:45 PM (UTC-8)
Project Location Surface Road	Status Pending
Title * OCI-100056-01-02 PR2	Request Date * 03/02/2020 05:00 PM (UTC-8)
Contract Reference Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? * Yes	EDGE Certified Prime? No
Retainage Release Requested? No	

Attachments Comments

Information
No Attachments.



Review Application for Payment

Retainage Release-Substantial Completion

- ▶ Check Retainage Release Field- If Yes; ensure the following documents are attached:
 - ▶ Payment Release Affidavit (OFCC Website F390-04v0912) Signed and notarized by Contractor
 - ▶ Executed Substantial Completion Certification with AE's Punch list attached (OFCC Website F390-05)
 - ▶ Consent of Surety

The screenshot shows a web application interface with a 'General' tab selected. The form contains the following fields:

Organization	Department of Administrative Services	Record Number	CPR-0018
Project Name	OAKS CI Training 1	Creator	Matthew Weber
Project Number	OCI-080001	Creation Date	07/28/2020 09:45 PM (UTC-8)
Project Location	Surface Road	Status	Pending
Title *	OCI-100056-01-02 PR2	Request Date *	03/02/2020 05:00 PM (UTC-8)
Contract Reference	Fred 20091009 OAKS Plumbing	Contractor Name	Sands Decker Ltd.
Final Payment? *	No	EDGE Certified Prime?	No
Retainage Release Requested?	Yes		

The 'Retainage Release Requested?' field is highlighted with a red border. To the right of the form, there is an 'Attachments' section with a plus icon and a dropdown arrow, and an 'Information' icon with the text 'Information' and 'No Attachments' below it.

Pay Applications

Required Documents During Close-Out

1) Partial Release of Retainage

Upon consent of the Contractor's Surety, the Contracting Authority may reduce the amount of funds retained for the faithful performance of Work by 50% of the amount of funds required to be retained, provided the Contractor's Surety remains responsible for all damages that may be caused due to default by the Contractor, including, but not limited to, the following:

*Completion of the Work
All interference, disruption, hindrance and delay claims/
All Liquidate Damages; and
All additional expenses incurred by the State*

Note: this should be a rare occurrence – if a request comes in via a pay application – please consult with the Project Manager before moving it forward.

a) Required Documents needed (to be attached to the pay application business process in OAKS-CI)

- i) Payment Release Affidavit (OFCC Website F390-04v0912)
- ii) Consent of Surety

2) Release of Retainage / Substantial Completion

a) Required Documents needed (to be attached to the pay application business process in OAKS-CI)

- i) Payment Release Affidavit (OFCC Website F390-04v0912)
- ii) Executed Substantial Completion Certification with AE's Punch list attached (OFCC Website F390-05)

3) Contract Completion / Final Pay Application

a) Required Documents needed (to be attached to the pay application business process in OAKS-CI)

- i) Certification of Contract Completion (OFCC Website – Form F390-01v0912)
- ii) Payment Release Affidavit (OFCC Website F390-04v0912)

4) Partial Contract Completion (to be attached to the pay application business process in OAKS-CI)

a) Required Documents needed

- i) Certificate of Contract Completion – marked partial (Form F390-01v0912) *(contract balance would still remain)*
- ii) Payment Release Affidavit (OFCC Website F390-04v0912)
- iii) Consent of Surety



Application for Payment – District Approval (District Rep)

District Approval

- ▶ District Rep 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 District Training Project 1

Applications for Payment K12 PR-0013 is sent to you for District Approval.

From : **Matthew Weber**
Sent For : **District Approval**

Source Name : **OAKS CI District Training Project 1**
Record No : **Applications for Payment K12 PR-0013**
Title : **SFC-100056-01-P2**

[Unifier Login](#)



Accept Task

- ▶ To begin work on the record, click **Accept**

The screenshot displays the Oracle Applications for Payment K12 interface. The browser title is "Applications for Payment K12 - SFC-100056-01-P2 - Project No. SFC-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/uafpk/67/0/0?srcid=67&model=uafpk&fromcostlog=1&project_id=1084&nfl=0&_uref=uuu61367333...". The page title is "Applications for Payment K12".

The interface includes a navigation bar with "General", "Pay Request Details", "Added Purchase Orders", and "Vouchers". The "General" tab is active.

The "Task Details" section shows:

- From: Matthew Weber
- To: Archana Atrey, Jordan Zamy, Lance Witcher, Matthew Weber, Purna Irukulapati, Rita Nichols, Shauna Hooks, Shon Brad...
- Sent For: District Approval

The "General" section shows:

- Project Name: OAKS CI District Training Project 1
- Record Number: PR-0013
- Project Number: SFC-080001
- Creator: Matthew Weber
- Organization Name: OAKS CI District Training Project - 1
- Creation Date: 10/14/2020 11:15 AM (UTC-8)
- Facility Name: [Empty]
- Status: Pending
- Title: SFC-100056-01-P2
- Request Date: [Empty]

The "Attachments" section shows a list of published attachments:

Name
L110-08-CI-2019-JUL-A...
Signed Consultant_Agre...

The "Total: 2" is displayed at the bottom of the attachments list.

School District Approval

- ▶ District Rep or District Treasurer:
 - ▶ Review the Application for Payment
 - ▶ Review Funding Distribution

Applications for Payment K12 - SFC-100056-01-P2 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218630/undefined/undefined?_uref=uuu163268504t4

Applications for Payment K12

Send Save

General Pay Request Details Added Purchase Orders

Update the distribution of retainage, liens, liquidated damages, and other withholds in this block. Verify the Withheld amounts, there is no validation on this form.

Earned To Date (\$)	402,500.00	Earned To Date LFI Portion (\$)	0.00	Earned To Date Project Fund (\$)	402,500.00
Previous Payments (\$)	0.00	Previous Payments from LFI (\$)	0.00	Previous Payments from Project Fund (\$)	0.00
Withheld This Period (\$)	0.00	Withheld from LFI (\$)	<input type="text" value="0.00"/>	Withheld from Project Funds (\$)	<input type="text" value="0.00"/>
Total Requested (\$)	402,500.00	LFI Portion (\$)	0.00	Project Fund Portion (\$)	402,500.00
		Sum of LFI Paid (\$)	0.00	Sum of Project Fund Paid (\$)	402,500.00

Attachments Comments

Published Attachments

- L110-08-CI-2019-JI
- Signed Consultant_

Total: 2

Purchase Order Information

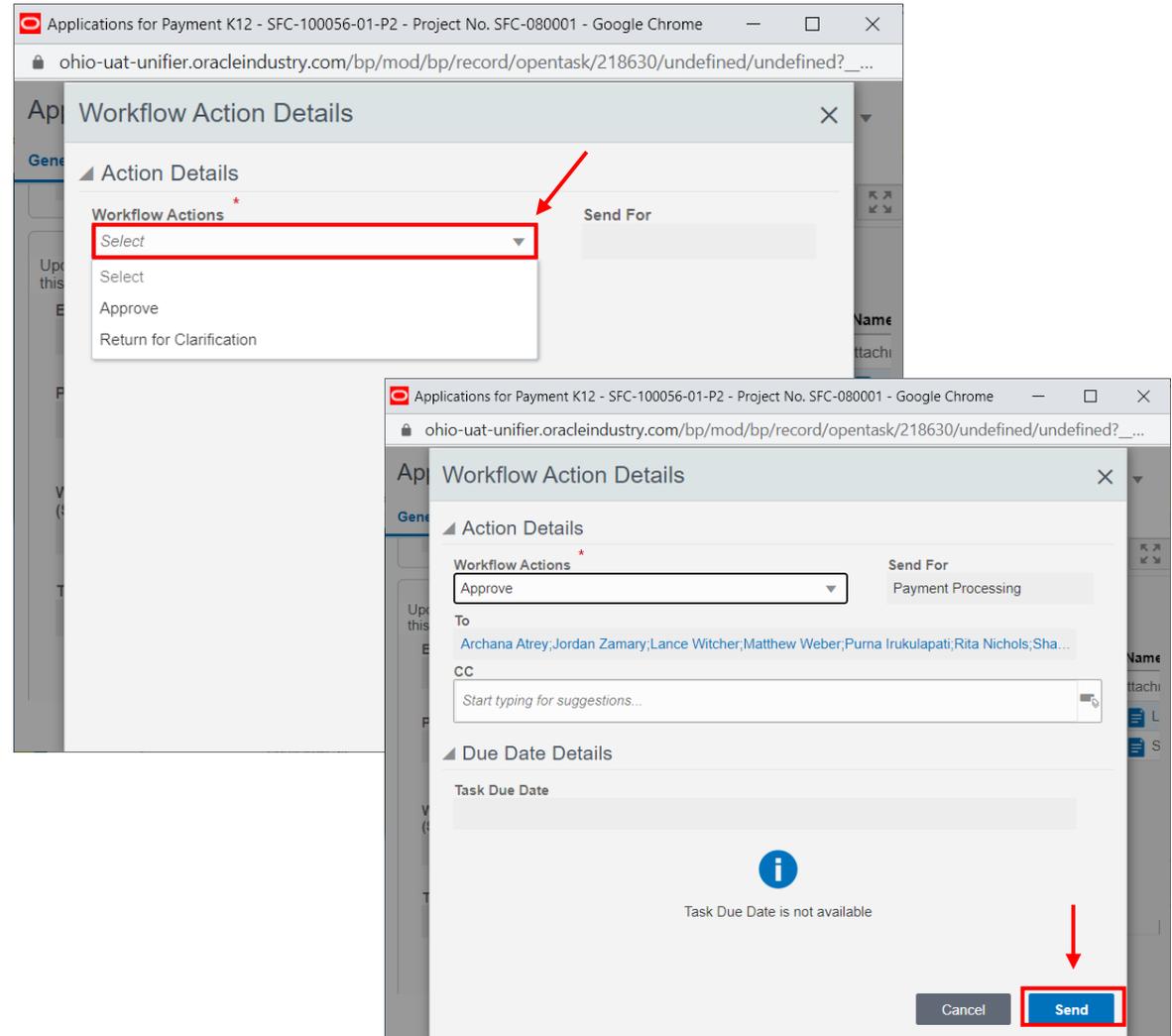
PC Review and Validation

- ▶ Verify that a PO has been applied by viewing the Purchase Order information area
- ▶ If an additional PO requires attachment:
 - ▶ Click the Purchase Orders tab, Click Add
 - ▶ See instructions in this job aid for adding PO

The screenshot displays the 'Contractor Pay Request' application interface. The browser title is 'Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&model=ucpr&_uref=uuu387999...'. The application title is 'Contractor Pay Request'. The navigation tabs are 'General', 'Pay Request Details', and 'Added Purchase Orders'. The 'Added Purchase Orders' tab is highlighted with a red box. Below the tabs, there is an 'Add' button circled in red, and an 'Actions' dropdown menu. A table is displayed with the following columns: 'No.', 'OAKS PO No.', 'OAKS PO Amount (\$)', 'OAKS Amount Applied (\$)', and 'OAKS PO Date'. The table is currently empty, and the total is shown as 'Total: 0'. On the right side, there is a 'Line Item Details' panel with the following fields: 'PO No.' (OCI General 080001-05-PO), 'OAKS PO No.', 'OAKS PO Amount (\$)' (175,000.00), 'OAKS Amount Applied (\$)' (0.00), 'OAKS PO Date' (MM/DD/YYYY HH:MM AM), 'Local PO No.', 'Local PO Amount (\$)' (0.00), 'Local Amount Applied (\$)' (0.00), 'Local PO Date' (MM/DD/YYYY HH:MM AM), and 'Short Description *' (OCI General 080001-05-PO). At the bottom of the panel are 'Cancel', 'Save', and 'Save & Add New' buttons.

PM Review

- ▶ If record must be returned for update:
 - Add a General Comment. See [General Comments](#) section for instructions.
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**
- ▶ If record is ready to move forward to Payment Processing:
 - ▶ Choose **Accept**
 - ▶ Click **Send**



Application for Payment – Payment Processing (District Treasurer)

Professional Services Agreement Pay Request Payment Processing (Owner Financial)

- ▶ As the **District Treasurer** representative you will:
 - ▶ **Create the Voucher (check) in your own financial system of record**
 - ▶ Record a Voucher Record in OAKS CI
 - ▶ Pull the Voucher Record into the Application for Payment



District Approval

- ▶ District Treasurer 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 District Training Project 1

Applications for Payment K12 PR-0013 is sent to you for Payment Processing.

From :	Matthew Weber
Sent For :	Payment Processing

Source Name :	OAKS CI District Training Project 1
Record No :	Applications for Payment K12 PR-0013
Title :	SFC-100056-01-P2

[Unifier Login](#) 

Accept Task

- ▶ To begin work on the record, click **Accept**

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

- Browser Tab:** Applications for Payment K12 - SFC-100056-01-P2 - Project No. SFC-080001 - Google Chrome
- URL:** ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218661?task_id=218661&parent_id=0&viewOnly=0&project_id=1084&model=uafpk&__uref=uuu...
- Page Title:** Applications for Payment K12
- Navigation:** General (selected), Pay Request Details, Added Purchase Orders, Vouchers
- Task Details:**
 - From:** Matthew Weber
 - To:** Archana Atrey, Jordan Zamy, Lance Witcher, Matthew Weber, Purna Irukulapati, Rita Nichols, Shauna ...
 - Sent For:** Payment Processing
- General Information:**

Project Name OAKS CI District Training Project 1	Record Number PR-0013
Project Number SFC-080001	Creator Matthew Weber
Organization Name OAKS CI District Training Project - 1	Creation Date 10/14/2020 11:15 AM (UTC-8)
Facility Name	Status Approved
Title SFC-100056-01-P2	Request Date
- Attachments:**

Name	Title
<input checked="" type="checkbox"/> L110-08-CI-2019-JUL-A...	
<input checked="" type="checkbox"/> Signed Consultant_Agre...	

Total: 2

Payment Processing

- ▶ Review information in the General tab

Applications for Payment K12 - SFC-100056-01-P2 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218661/undefined/undefined?__uref=uuu163268504t4

Applications for Payment K12

Send Save

General Pay Request Details Added Purchase Orders Vouchers

Pay the Total Requested amount below. Record the voucher in the Voucher BP and link it to this pay request in the Voucher Information block below.

General

Project Name OAKS CI District Training Project 1	Record Number PR-0013
Project Number SFC-080001	Creator Matthew Weber
Organization Name OAKS CI District Training Project - 1	Creation Date 10/14/2020 11:15 AM (UTC-8)
Facility Name 	Status Approved
Title SFC-100056-01-P2	Request Date
Contract Reference SFC-080001-02-01 Test SOV	Contractor Name Dynamix Engineering
Final Payment? No	EDGE Certified Prime?
Retainage Release Requested? No	
Period From 09/01/2020	Period To 09/30/2020

Attachments

Comments

Published Attachments

<input checked="" type="checkbox"/>	L110-08-CI-2019-JUL-
<input checked="" type="checkbox"/>	Signed Consultant_Agi

Total: 2

Payment Processing – Record Voucher

- a) Open the Voucher tab
- b) Click Create

The image shows two overlapping browser windows from Oracle Applications. The top window, titled 'Applications for Payment K12', has the 'Vouchers' tab selected in the navigation bar. A red circle highlights the 'Vouchers' tab, with a blue circle 'a' and a red arrow pointing to it. The bottom window, titled 'Professional Services Pay Request', has the 'Voucher' tab selected. A red circle highlights the '+ Create' button, with a blue circle 'b' and a red arrow pointing to it. The 'Professional Services Pay Request' window shows a table with columns: Title, Vendor Name, Voucher Description, Amount (\$), Status, OAKS Vou..., and Local. The total amount is 0.

Payment Processing – Record Voucher

- ▶ Under the General tab:
 - ▶ Title the Record
 - ▶ **Set the Record Status to: Paid**
 - ▶ Choose Financial System of Record

Create New Vouchers K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1k/1084?_uref=uuu163268504t4

Create New Vouchers K12 Submit Save

General Voucher Distribution Line

General

Record the payment voucher or check used to pay the invoice selected below. This record can be edited when required. Attachments can be uploaded from your desktop. Click 'Finish Editing' to save the record.
NOTE: This BP does not generate payments, that must be done in your financial system of record.

Project Number SFC-080001	Record Number
Project Name OAKS CI District Training Project 1	Creator Matthew Weber
Organization Name OAKS CI District Training Project - 1	Creation Date
Facility Name	Status * Paid
Title * Pay Application 1	Payment Purpose * Application for Payment
	Financial System of Record District

Select the one invoice paid by this voucher from one of the next four blocks. The other blocks are left blank. Only one invoice may be tied to this voucher.

Attachments >

Information
No Attachments.



Payment Processing – Record Voucher

- ▶ Scroll down the General tab using the slider
- ▶ Select the appropriate **Pay Request Name**

The screenshot displays the 'Create New Vouchers K12' web application. The main window shows a 'General' tab with a 'Voucher Distribution Line' section. A dropdown menu for 'Pay Request Name' is open, showing a list of applications. A red circle highlights the selected item, 'SFC-100056-01-P2'. A red arrow points from this dropdown to the 'Select' button in the 'Applications for Payment K12' modal window. The modal window contains a table with the following data:

Title	Contract SOV	Contractor Name	Percent Complete	Pa Requ
SFC-100056-01-P2	SFC-080001-02-01 Test SOV	Dynamix Engineering	0	40
Test-2	SFC-080001-02-01 Test K12 SOV	Dynamix Engineering	0.85	47
er	03 District Training	Dynamix Engineering	0	3
Test K12 10/18	SFC-080001-02-01 Test K12 SOV	Dynamix Engineering	0.85	47
Test K12	03 District Training	Dynamix Engineering	0	3
999	SFC-080001-02-01 Test K12 SOV	Dynamix Engineering	0.85	26
Architect Pay Request	SFC-080001-02-01 Test SOV	Dynamix Engineering	0	31
Test	SFC-080001-02-01 Test SOV	Dynamix Engineering	0	21
Test	SFC-080001-02-01 Test K12 SOV	Dynamix Engineering	0	20
03 District Training P...	03 District Training	Dynamix Engineering	0	3
03 District Training P...	03 District Training	Dynamix Engineering	0	3

The form also shows the following values:

- Contractor Pay Request Amount (\$): 402,500.00
- Labor Payment Requested: 402,500.00
- Material Payment Requested: 0.00
- LFI Portion (\$): 0.00
- Project Fund Portion (\$): 402,500.00
- Contract Retainage: 0.00

Payment Processing – Record Voucher

- ▶ Scroll down to the Confirmed Financial System Data Section
- ▶ Plug in:
 - ▶ Voucher ID number (Check #)
 - ▶ Payment Date
 - ▶ Payment Method
 - ▶ Payment Amount

Create New Vouchers K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1k/1084?_uref=uuu163268504t4

Create New Vouchers K12 Submit Save

General Voucher Distribution Line

Confirmed Financial System Data

Enter the check #, voucher #, and/or payment information.

Payment ID 12345	Payment Amount (\$) 0.00
Payment Date 10/01/2020	Testing Creation Date 10/01/2020
Payment Method Select	

Select

- Check / Warrant (CHK)
- Electronic Payment(CTX-EDI)
- Electronic Payment (ACH)
- ISTV Electronic Transfer
- Electronic Payment (EFT)

Attachments

No Attachments.



Payment Processing (Owner Financial)

e) Enter PO Amount

Create New Vouchers - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen_prof_ser_pay_req...

Create New Vouchers

Submit Save

General Voucher Distribution Line

Voucher Line 1
Enter the PO this voucher will be paid from. More lines are available after the Voucher Details block

OAKS PO Name 1 OCI Test PO - mmw	Amount (\$) 25,000.00
OAKS PO No.	Line Item Total (\$) 0.00
Local PO No.	Difference (\$) 25,000.00

Voucher Details
OAKS Voucher Number should be 8 digits ex: 00005678

OAKS Voucher ID	Local Voucher ID
OAKS Payment Date MM/DD/YYYY HH:MM AM	Local Payment Date MM/DD/YYYY HH:MM AM
OAKS Payment Method Select	Local Payment Method Select
OAKS Payment Amount (\$) 0.00	Local Payment Amount (\$) 0.00



Payment Processing – Record Voucher

- ▶ Open **Voucher Distribution Lines** tab
- ▶ Click **Add**

The image displays two screenshots of the Oracle Pay Request system interface. The left screenshot shows the 'Create New Vouchers K12' page for Project No. SFC-080001. The 'Voucher Distribution Line' tab is selected and circled in red. The 'Add' button in the 'Voucher Distribution Line' tab is also circled in red. The right screenshot shows the 'Create New Vouchers' page for Project No. OCI-080001. The 'Voucher Distribution Line' tab is selected and circled in red. The 'Add' button in the 'Voucher Distribution Line' tab is also circled in red. Below the 'Add' button is a table with columns for 'No.', 'Fund Code', and 'Fund Name'. The table is currently empty. Below the table, there is a 'Total: 0' label and a 'Total Amount' dropdown menu set to '0.00'. An information icon is visible in the bottom right corner of the right screenshot.

Payment Processing – Record Voucher

- a) Click the button to select a Fund Code
- b) Highlight a Fund Code
- c) Click **Select**

Create New Vouchers K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1k/1084?_uref=uuu163268504t4

Create New Vouchers K12

General **Voucher Distribution Line** Submit S

Add Actions

No.	Fund Code

Total Amount: 0.00
Total: 0

Line Item Details

General

Fund Code *
OCI-Other-TestFund-0-OCI-1

Fund Name
OCI Test Fund

Short Description *
Test Fund

Amount (\$) *
100,000.00

Financial System of Record
OAKS FIN

Enter the PO reference for this line item

Cancel Save Save & Add New

Create New Vouchers K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1k/1084?_uref=uuu163268504t4

Fund Picker

Search | Find on Page

Fund Code	Fund Name	Agency
Northwoo13-Dis-LFI-004-8625-0000	School District LFI	Northwood
Northwoo13-Dis-Proj-004-8005-0000	School District Local Share	Northwood
Northwoo13-St-Proj-010-8005-0000	School District State Share	Northwood
OCI-Other-TestFund-0-OCI-1	OCI Test Fund	OCI
OCI-Other-TestFund-0-OCI-Wave4	OCI Wave 4 Test Fund	OCI

Total: 5

Cancel Select



Payment Processing – Record Voucher

d) Add a Short Description, enter Dollar Amount, and select Financial System of Record

e) Click Save or Save & Add New

Create New Vouchers K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1k/1084?_uref=uuu163268504t4

Create New Vouchers K12

Submit Save

General Voucher Distribution Line

Add Actions

No. Fund Code

Line Item Details

General

Fund Code *
OCI-Other-TestFund-0-OCI-1

Fund Name
OCI Test Fund

Short Description *
Test Fund

Amount (\$) *
100,000.00

Financial System of Record
OAKS FIN

Enter the PO reference for this line item

Cancel Save Save & Add New

Total: 0



Payment Processing – Record Voucher

- ▶ Your line(s) will show in the Voucher Distribution Lines tab
- ▶ Click **Submit** to finish recording the voucher

Create New Vouchers K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1k/1084?_uref=uuu163268504t4

Create New Vouchers K12

General **Voucher Distribution Line**

Line Item Details Attachments Linked Records

No.	Fund Code	Fund Name
001	OCI-Other-TestFund-0-OCI-1	OCI Test Fund

Total: 1

Total Amount: 100,000.00

General

Fund Code *
OCI-Other-TestFund-0-OCI-1

Fund Name
OCI Test Fund

Short Description *
Test Fund

Amount (\$) *
100,000.00

Financial System of Record
OAKS FIN

Enter the PO reference for this line item.

Cancel Save Save & Add New



Payment Processing – Add Voucher

- a) Return to the **General** tab
- b) Scroll down to the **Voucher Information** section
- c) Click the button to select previously recorded **Voucher**
- d) Highlight **Voucher**
- e) Click **Select**

The screenshot displays the 'Applications for Payment K12' interface. The 'General' tab is selected, and the 'Voucher Information' section is visible. A modal window titled 'Vouchers K12' is open, showing a table of vouchers. The 'Select' button in the modal is highlighted.

Title	Testing Creation Date	Payment Date	Amount (\$)	Record Number	Payment ID
Pay Application 1	10/01/2020	10/01/2020	402,500.00	VOU-0014	12345
test			470,000.00	VOU-0013	
Katie's Planning		07/31/2017	5,000.00	VOU-0012	698653
ELECTRICITY		07/31/2017	5,000.00	VOU-0011	56789
Builders Risk Insurance		07/14/2017	24,000.00	VOU-0010	82356
Bernice's temp water serv#1		07/14/2017	8,000.00	VOU-0009	97001
Katie's Temp. Water #1		07/14/2017	8,000.00	VOU-0008	63598
Katie's Boiler Facilitation		07/13/2017	20,000.00	VOU-0007	86542
Jim's Roofing Replacement		07/13/2017	450,000.00	VOU-0006	133784
Danvil		07/13/2017	20,000.00	VOU-0005	arher numb

Payment Processing – Send Record

- ▶ When the record is ready to move forward, click **Send**

Applications for Payment K12 - SFC-100056-01-P2 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218661/undefined/undefined?_uref=uuu163268504t4

Applications for Payment K12

Send Save

General Pay Request Details Added Purchase Orders Vouchers

Voucher 1	Voucher 1 ID	Voucher 1 Amount (\$)
Pay Applicati...	12345	0.00
Voucher 2	Voucher 2 ID	Voucher 2 Amount (\$)
Type a Title...		0.00
Voucher 3	Voucher 3 ID	Voucher 3 Amount (\$)
Type a Title...		0.00
Voucher 4	Voucher 4 ID	Voucher 4 Amount (\$)
Type a Title...		0.00
Voucher 5	Voucher 5 ID	Voucher 5 Amount (\$)
Type a Title...		0.00
		Voucher Total (\$)
		0.00

Attachments Con >

Published Attachments

Name
<input checked="" type="checkbox"/> L110-08-CI-2
<input checked="" type="checkbox"/> Signed Cons

Total: 2



Payment Processing – Send Record

- ▶ Verify Workflow Action
- ▶ Click **Send**
- ▶ This will end the Application for Payment Workflow

The screenshot shows a web browser window with the title 'Applications for Payment K12 - SFC-100056-01-P2 - Project No. SFC-080001 - Google Chrome'. The address bar shows the URL 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/218661/undefined/undefined?_uref=...'. The main content is a 'Workflow Action Details' dialog box. The dialog has a 'General' tab selected. Under 'Action Details', there is a 'Workflow Actions' dropdown menu with 'Vouchered' selected, highlighted by a red box. To the right is a 'Send For' dropdown menu with 'End' selected. Below these is a 'CC' field with the placeholder text 'Start typing for suggestions...'. At the bottom of the dialog are two buttons: 'Cancel' and 'Send'. A red arrow points to the 'Send' button.





Design Reviews

K-12



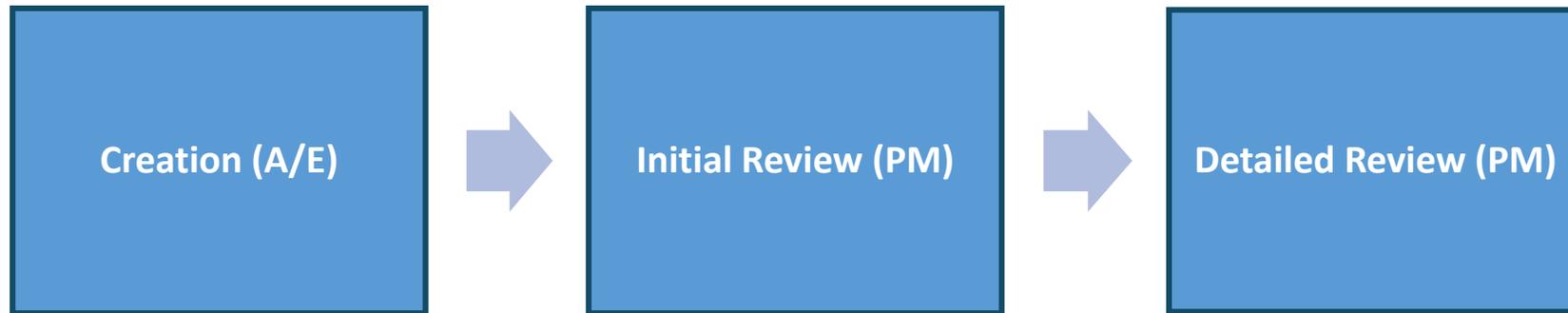
Purpose & Procedure

- ▶ The Design Review business process provides for the electronic submission, review and approval of the program verification, schematic design, design development and construction documents.
- ▶ The business process must be submitted at specific stages of the design process as defined in the Associate's (A/E) contract.
- ▶ Using this process, the Associate submits drawings and specifications electronically. The Project Manager (PM) coordinates review of the submittal. Automated workflow guides the process and records the results to the project record.



Design Review

Workflow Steps:



Click the boxes to navigate directly to each section

Uploading to Document Manager

- * *If you are a School District Project user, skip ahead to [Create Design Review Record](#)*

If you are using Document Manager to add attachments to the Design Review, this should be done before creating the Design Review Record. The following section will walk you through uploading files to the Document Manager.



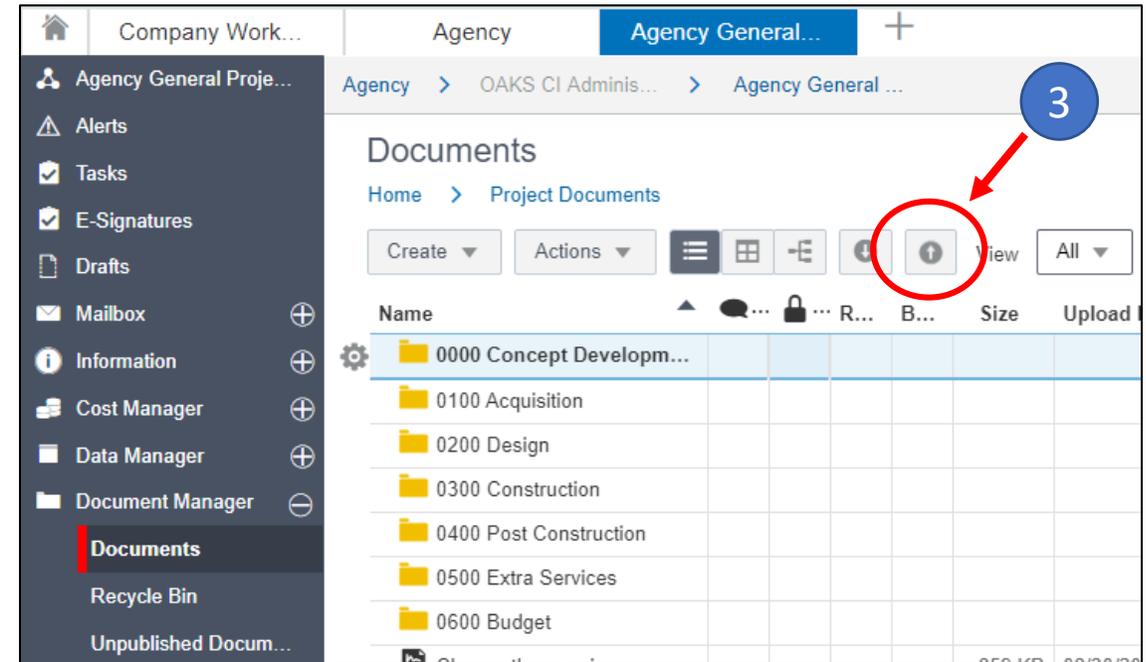
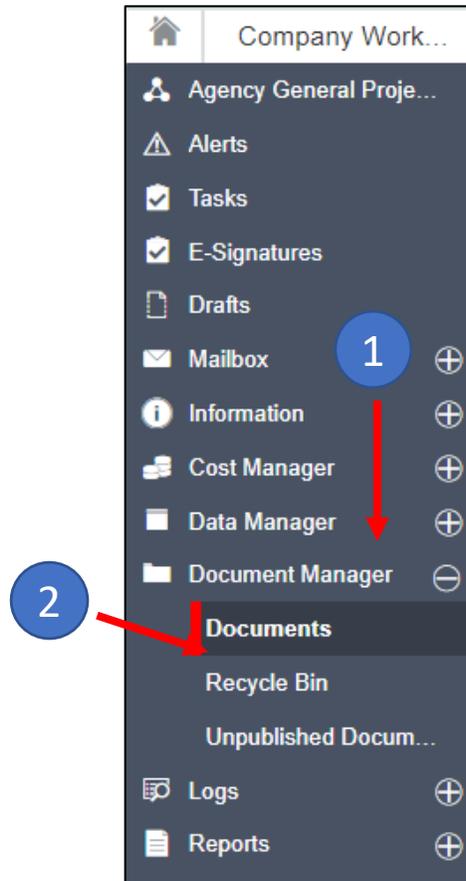
About Document Manager

- ▶ 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



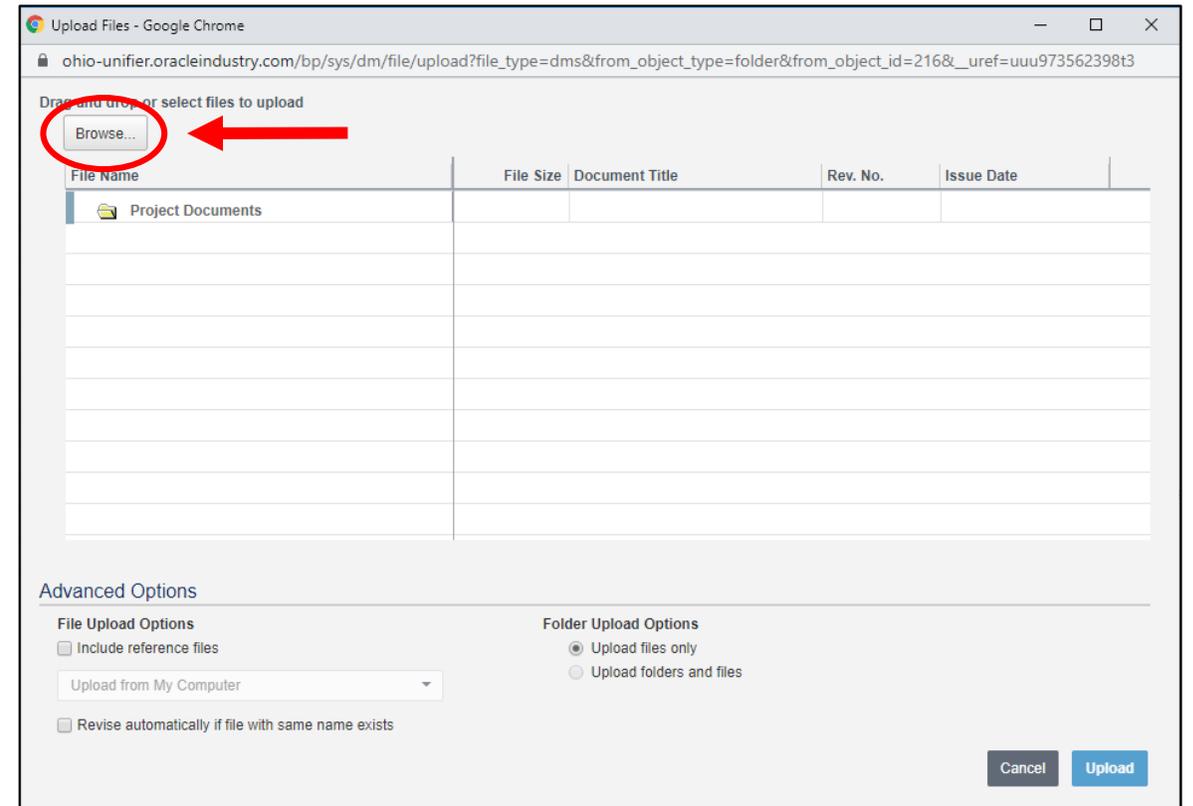
Document Upload

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



File Upload Window

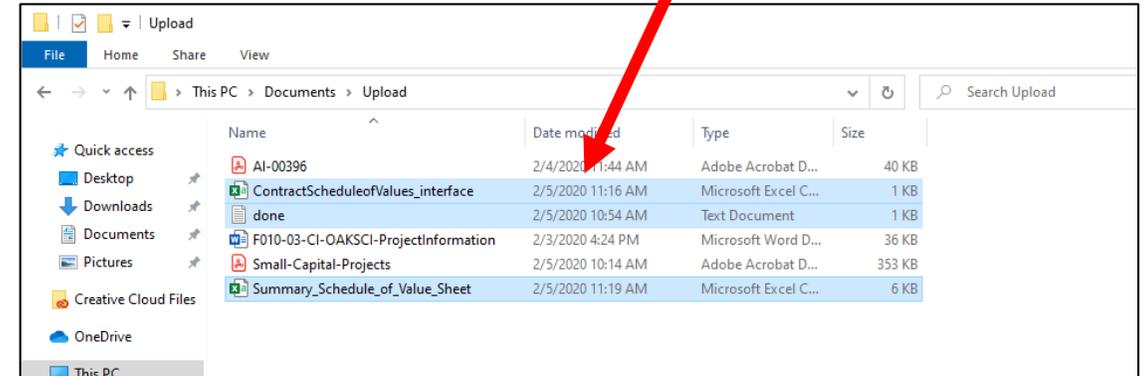
- ▶ A new window will appear for you to add files
- ▶ Click **Browse** to choose files for upload



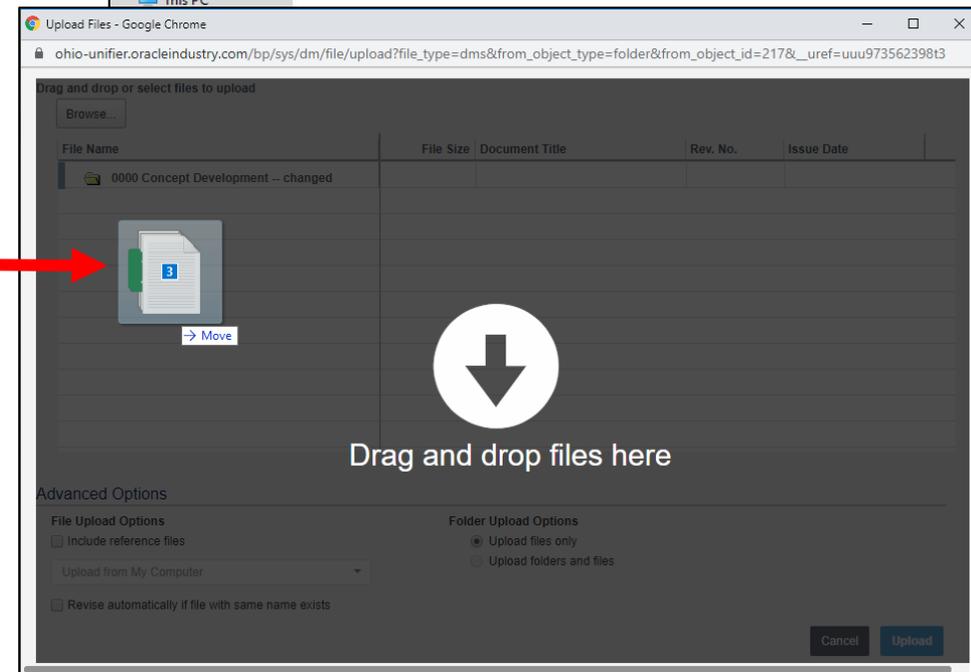
Drag and Drop files

- ▶ Find the document(s) on 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

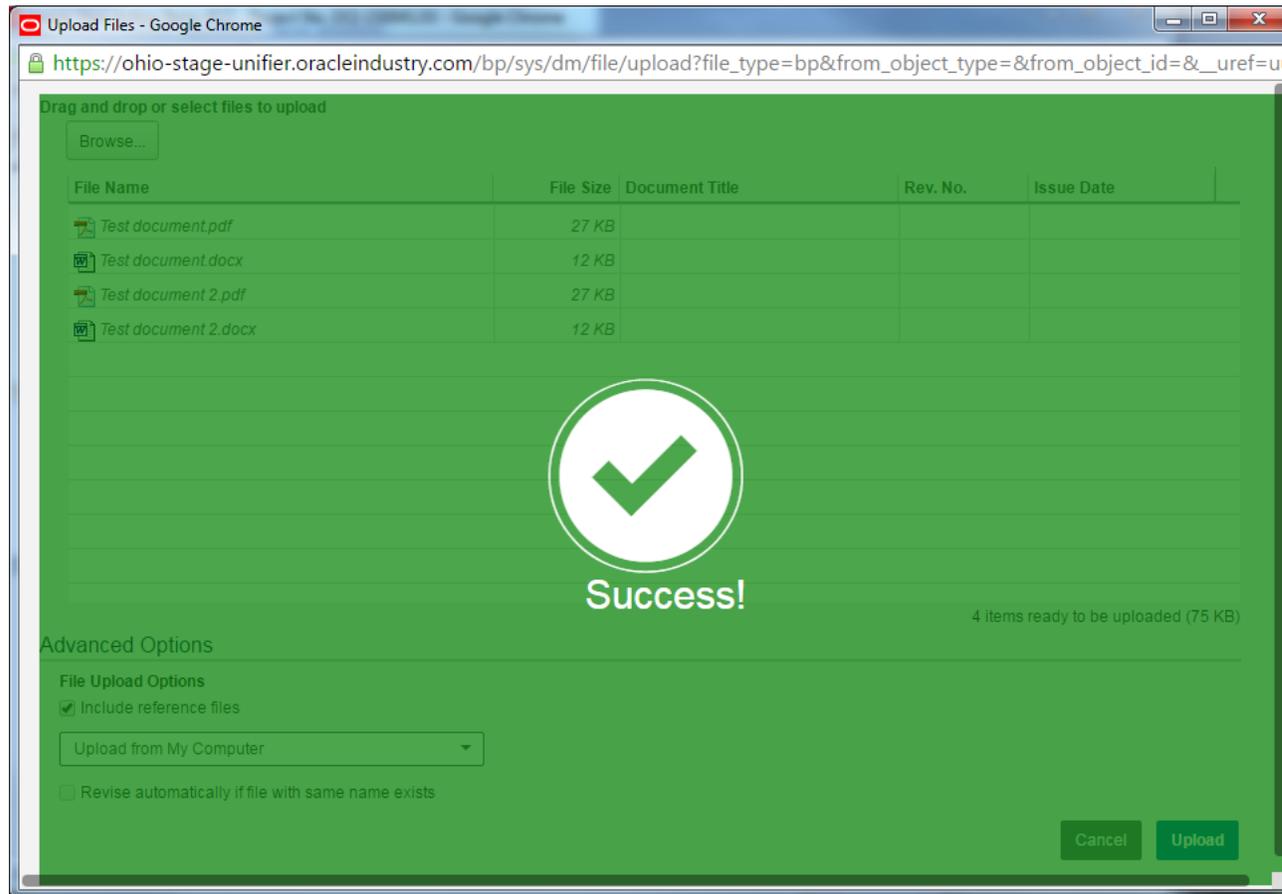


Drag and Drop the documents into the Upload Files window



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



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 displays the Oracle Primavera Unifier interface. The top navigation bar shows 'ORACLE Primavera Unifier' and the current path: 'Company Work... > Agency > Agency General...'. The left sidebar contains a navigation menu with 'Documents' selected. The main content area is titled 'Documents' and shows a list of files and folders. A red box highlights the toolbar area, which includes a 'Refresh' button (circular arrow icon). A tooltip message is displayed over the Refresh button, stating: 'Files or folders have been successfully uploaded to the currently open Document Manager. To see the changes, click Refresh'. The document list includes folders for various project phases (0000-0600) and individual files like 'Chrysanthemum.jpg', 'Clear Browsing Data.docx', 'Construction Phase DB Tr...', 'Desert.jpg', and 'Penguins.jpg'.

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



Create Design Review (A/E)



Create a Design Review Record (A/E)

1. Click **Logs** to expand
2. Select the **Design Reviews** BP
3. Click **Create**

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar is expanded to show 'Logs' (1) and 'Design Reviews' (2). The 'Create' button is highlighted with a red arrow and a blue circle (3). The main area displays a table of Design Review records.

Record No	Stage	Completi...	Creation...	Est. Construction ...	St
DR-0007	Criteria Documents	50% (CD O...	04/05/2017 ...	0.00	Ac
DR-0006	Program Verification	85 - 95% (C...	12/28/2016 ...	0.00	Pe
DR-0005	Criteria Documents	50% (CD O...	09/16/2015 ...	0.00	Pe
DR-0004	Program Verification	50% (CD O...	02/16/2015 ...	8,450.00	Ac
DR-0003	Schematic Design	50% (CD O...	09/19/2012 ...	25,000.00	Pe
DR-0002	Program Verification	50% (CD O...	04/10/2012 ...	0.00	Pe
DR-0001	Construction Doc...	50% (CD O...	10/08/2009 ...	0.00	Pe

Total: 7



Complete General Tab – Create (A/E)

- ▶ Fill out all of the information in the General Tab
- ▶ The sections marked with a red * are required

Create New Design Reviews - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/udr/1003/46?__uref=uuu87962965t1#

Create New Design Reviews

Send Save

General Design Reviews

General

Organization: OAKS CI Test

Record Number:

Project Number: OCI-080001

Creator: Matthew Weber

Project Name: Agency General Projects Test

Creation Date:

Project Location: OAKS CI Administration

Status:

Est. Construction Cost (\$): 50,000.00

Owner Name: OAKS CI Test

Stage *: Program Verification

Completion Status *: 50% (CD Only)

Comments: No Comments are available.



Add Attachments to Design Review – Create (A/E)

- ▶ Click the **Design Reviews** tab
 - ▶ Here you will add attachments to the record

Create New Design Reviews - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/udr/1003/46?_uref=uuu87962965t1

Create New Design Reviews

Send Save

General **Design Reviews**

Add Actions View Comments by: All

Name	Type	Status
Attachments		

Total: 1

Folder Details

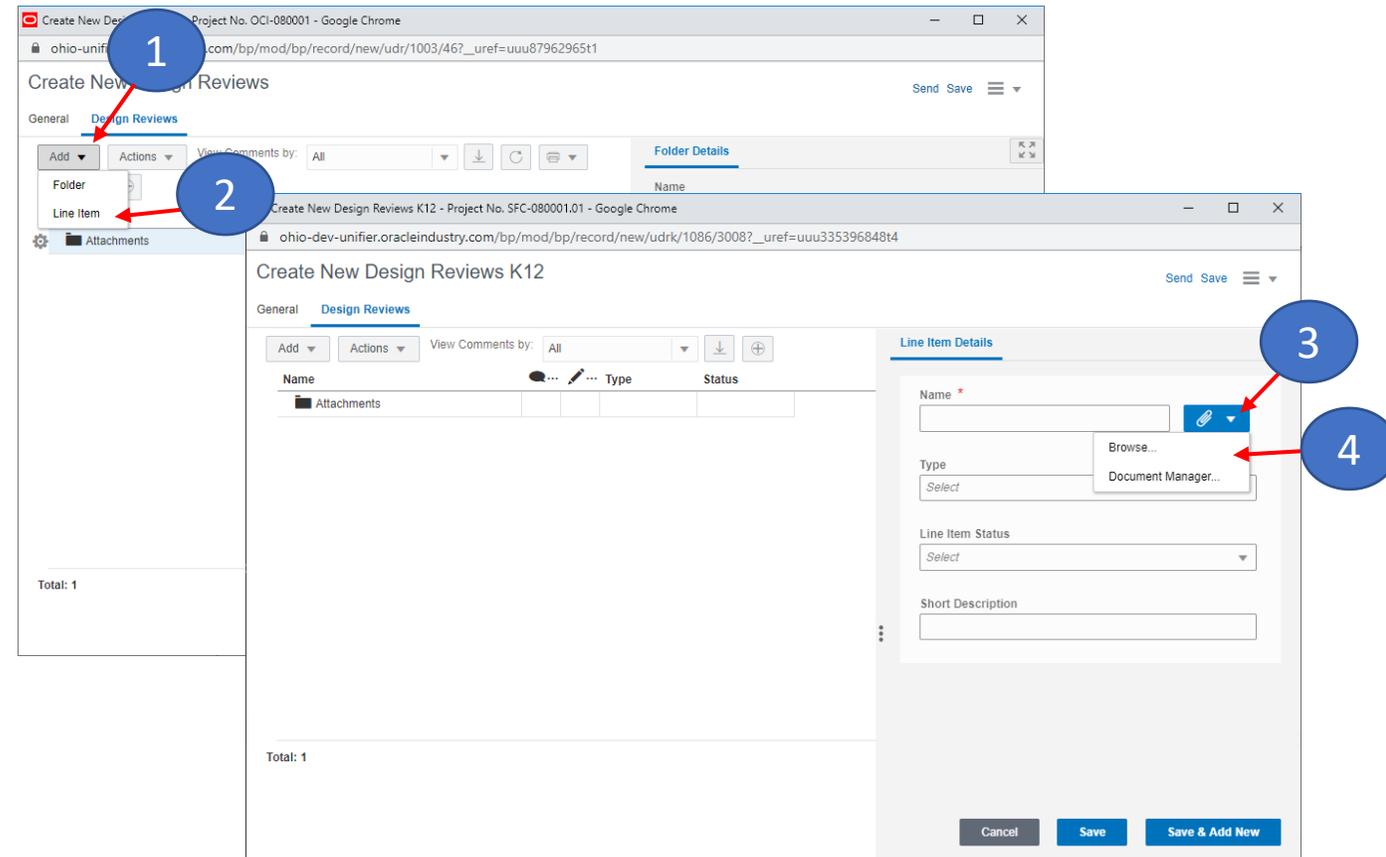
Name: Attachments

Folder Path:



Add Attachments – Create (A/E)

1. Click **Add**
2. Select **Line Item**
3. Click the attachment  button
4. Select **Browse** to attach documents from your computer, or select **Document Manager**

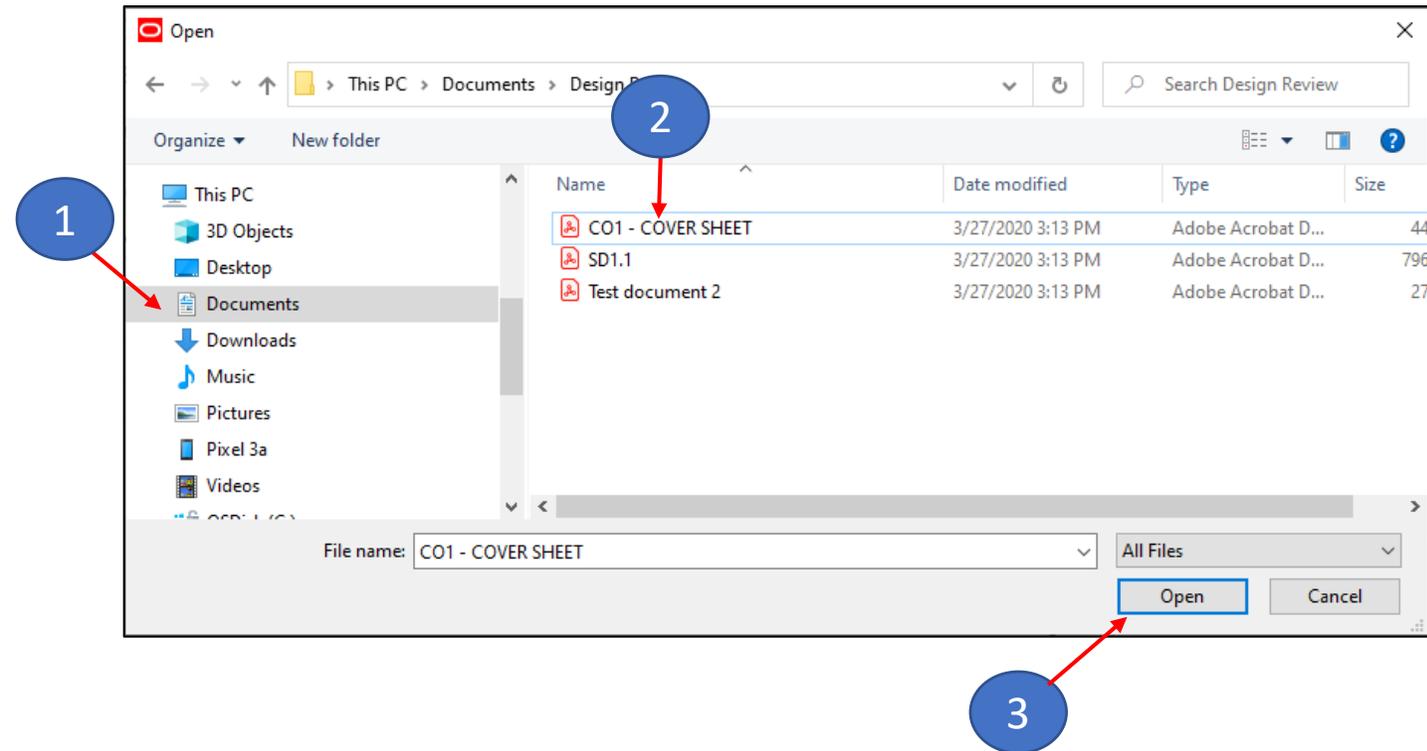


Add Attachments From Browse – Create (A/E)

* *If you uploaded the attachments with **Document Manager**, skip this slide*

▶ If you selected **Browse**, you will upload documents directly from your computer

1. Navigate to the folder where your documents are stored
2. Select the attachment you want to upload
3. Click **Open**



Add Attachments from Document Manager – Create (A/E)

* *If you uploaded the attachments from your computer with **Browse**, skip this slide*

▶ If you selected **Document Manager**, you will attach documents that are already uploaded

1. Navigate to the attachment by double clicking folders where the document is stored
2. Click the document you wish to attach
3. Click **Select**

The image shows two screenshots of a web application interface. The first screenshot shows a 'Select Files' dialog box with a breadcrumb trail: Home > Project Documents > 0200 Design. A table lists folders: 0210 Program Verification, 0215 Design Notes, 0220 Schematic Design, 0230 Design Development (highlighted), 0240 Construction Documents, 0250 Bid & Award, and 0299 Miscellaneous. A blue circle with the number '1' and a red arrow points to the '0230 Design Development' folder. The second screenshot shows the same dialog box with the breadcrumb trail: Home > Project Documents > 0200 Design > 0230 Design Development > Drawings PDF. A table lists files: Test document.pdf (27 KB), Test document.docx (12 KB), Test document 2.pdf (27 KB), and Test document 2.docx (12 KB). A blue circle with the number '2' and a red arrow points to the 'Test document.pdf' file. At the bottom right, a blue circle with the number '3' and a red arrow points to the 'Select' button, which is circled in red.



Add Attachments – Create (A/E)

- ▶ The selected document will appear under the **Name** field
- ▶ Complete **Type**, and **Short Description** fields
- ▶ Click **Save** or **Save & Add New**

The screenshot displays the 'Create New Design Reviews K12' web application. The main content area features a table with the following structure:

Name	Type	Status
Attachments		

Below the table, it indicates 'Total: 1'. To the right, the 'Line Item Details' panel is visible, containing the following fields:

- Name:** Test document 2.pdf
- Type:** Drawings
- Line Item Status:** Select
- Short Description:** Design Drawings

At the bottom of the panel, there are three buttons: 'Cancel', 'Save', and 'Save & Add New'. The 'Save' button is circled in red, and a red arrow points to it.

Add Attachments – Create (A/E)

- ▶ Your document will show on the left-hand side
- ▶ Continue adding any necessary attachments until you are ready to move the record forward
- ▶ When the record is ready to move forward, Click **Send**

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udrk/1086/3008?_uref=uuu183972507t4

Create New Design Reviews K12

General **Design Reviews**

Add Actions View Comments by: All

Name	Type	Status
Attachments		
Test document 2.pdf	Drawings	

Total: 2

Line Item Details Attachments Linked Records

Name *
Test document 2.pdf

Type
Drawings

Line Item Status
Select

Short Description
Design Drawings

Cancel Save Save & Add New



Submit for Initial Review – Create (A/E)

- ▶ Verify Workflow Action (Submit)
 - ▶ The recipients of the task will automatically populate
- ▶ Click Send
 - ▶ The record will be sent to the PM for Initial Review

Create New Design Review - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/udr/1003/46?_uref=uuu87962965t1#

Create New Design Review

Workflow Action Details

General Design Reviews

Workflow Actions *
Submit

Send For
Initial Review

To
Archana Atrey;Brett Gundlach;Matthew Weber;OHIO Administrator;Rita Nichols;Shauna Hooks;S...

CC
Start typing for suggestions...

Due Date Details

Task Due Date
03/28/2020 01:55 PM

Set all task due date as 03/28/2020 01:55 PM Set Individual task due dates

Name	Company Name	Task Due Date
Archana Atrey	State of Ohio	03/28/2020 01:55 PM
Brett Gundlach	State of Ohio	03/28/2020 01:55 PM
Matthew Weber	State of Ohio	03/28/2020 01:55 PM
OHIO Administrator	State of Ohio	03/28/2020 01:55 PM

Cancel Send



Initial Review (PM)



Receive Task – Initial Review (PM)

- ▶ PM 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

Design Reviews DR-0009 is sent to you for Initial Review.

From :	Matthew Weber
Sent For :	Initial Review
Task Due Date :	03/29/2020 01:14 PM (UTC-5)

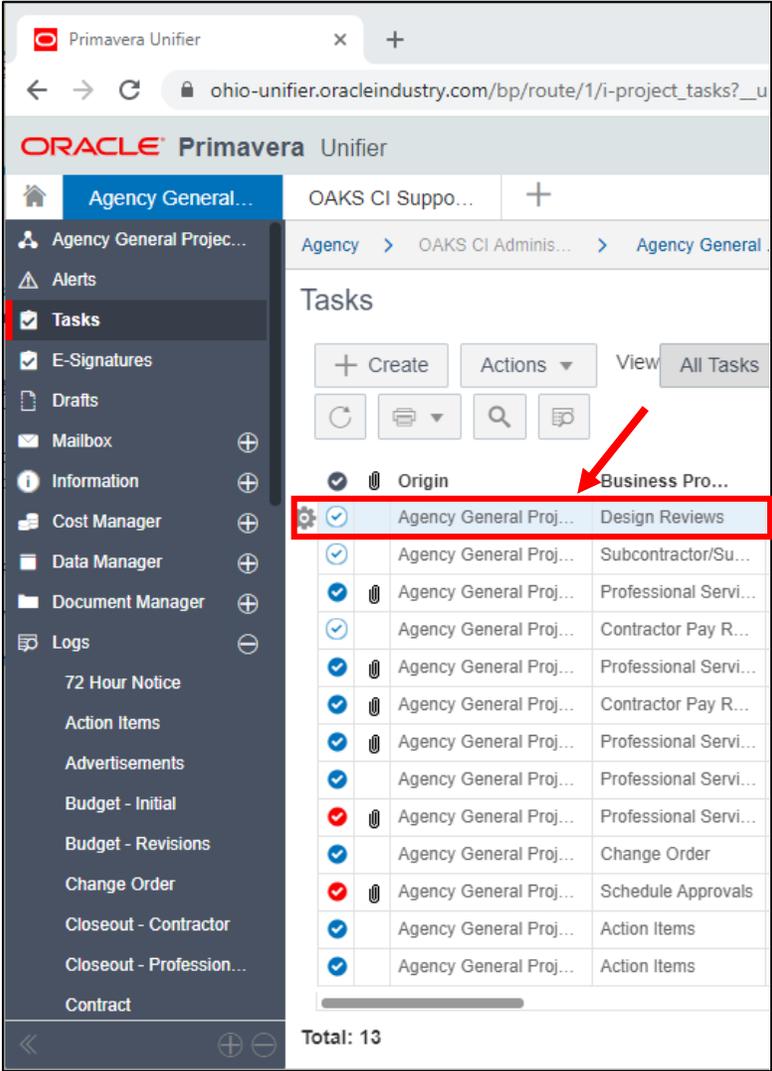
Source Name :	Agency General Projects Test
Record No :	Design Reviews DR-0009
Title :	

[Unifier Login](#)



Open Task – Initial Review (PM)

- ▶ After logging into the system, the PM will find the **Task** corresponding to the email
- ▶ Double click the **Task** to open



Accept Task – Initial Review (PM)

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

The screenshot displays a web interface for 'Design Reviews' in Oracle Industry Cloud. The browser title is 'Design Reviews - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2573470?task_id=2573470&parent_id=0&viewOnly=0&project_id=1003&model=udr&__uref=uuu936...'. The page title is 'Design Reviews'. In the top right corner, there are buttons for 'Accept' and 'Decline', with a red arrow pointing to the 'Accept' button. Below the title, there are tabs for 'General' and 'Design Reviews'. The 'General' tab is active, showing 'Task Details' and 'General' information. The 'Task Details' section includes 'From: Matthew Weber', 'To: Archana Atrey; Brett Gundlach; Matthew Weber; OHIO Administrator; Rita Nichols; Shauna Hooks; Steve...', 'Sent For: Initial Review', and 'Task Due Date: 03/29/2020 01:14 PM (UTC-5)'. The 'General' section includes 'Organization: OAKS CI Test', 'Record Number: DR-0009', 'Project Number: OCI-080001', and 'Creator: Matthew Weber'. On the right side, there is a 'Comments' section with tabs for 'Comments', 'Linked Records', 'Linked Mail', and 'Workflow Pr'. The 'Comments' tab is active, showing a 'No Comments are available' message. There are 'Clear' and 'Post' buttons in the comments section.



Review General Tab – Initial Review (PM)

- ▶ Review the information in the General Tab
- ▶ Check the right pane to see if there are any General Comments attached

The screenshot displays a web browser window titled "Design Reviews - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2573470/undefined/undefined?_uref=uuu936962708t1". The page header shows "Design Reviews" with "Send Save" and a menu icon. Below the header, there are two tabs: "General" (selected, indicated by a red arrow) and "Design Reviews".

The "General" tab contains a form with the following fields:

Organization OAKS CI Test	Record Number DR-0009
Project Number OCI-080001	Creator Matthew Weber
Project Name Agency General Projects Test	Creation Date 03/26/2020 01:15 PM (UTC-5)
Project Location OAKS CI Administration	Status Pending
Est. Construction Cost (\$) 50,000.00	Owner Name OAKS CI Test
Stage Program Verification	Completion Status 50% (CD Only)

The right pane is titled "Comments" (highlighted with a red box) and contains a "Linked Records" section, a "Lint" button, and a "Post" button. Below the "Post" button, there is an information icon and the text "Information No Comments are available."



Design Reviews – Initial Review (PM)

- ▶ Click the **Design Reviews** tab to view attachments
- ▶ Single click an attachment to view **Line Item Details** in the right pane
- ▶ Double click attachment to view

The screenshot displays the 'Design Reviews K12' interface in a web browser. The 'Design Reviews' tab is selected and circled in red. Below the tab, there are buttons for 'Add', 'Actions', and 'View Comments by: All'. A table lists attachments with columns for 'Name', 'Type', and 'Status'. The attachment 'CO1 - COVER SHEET.pdf' is highlighted in blue, and a red arrow points to it. To the right, the 'Line Item Details' pane is open, showing fields for 'Name' (CO1 - COVER SHEET.pdf), 'Type' (Drawings), 'Line Item Status', and 'Short Description' (Design Drawings). The pane also includes 'Cancel', 'Save', and 'Save & Add New' buttons.

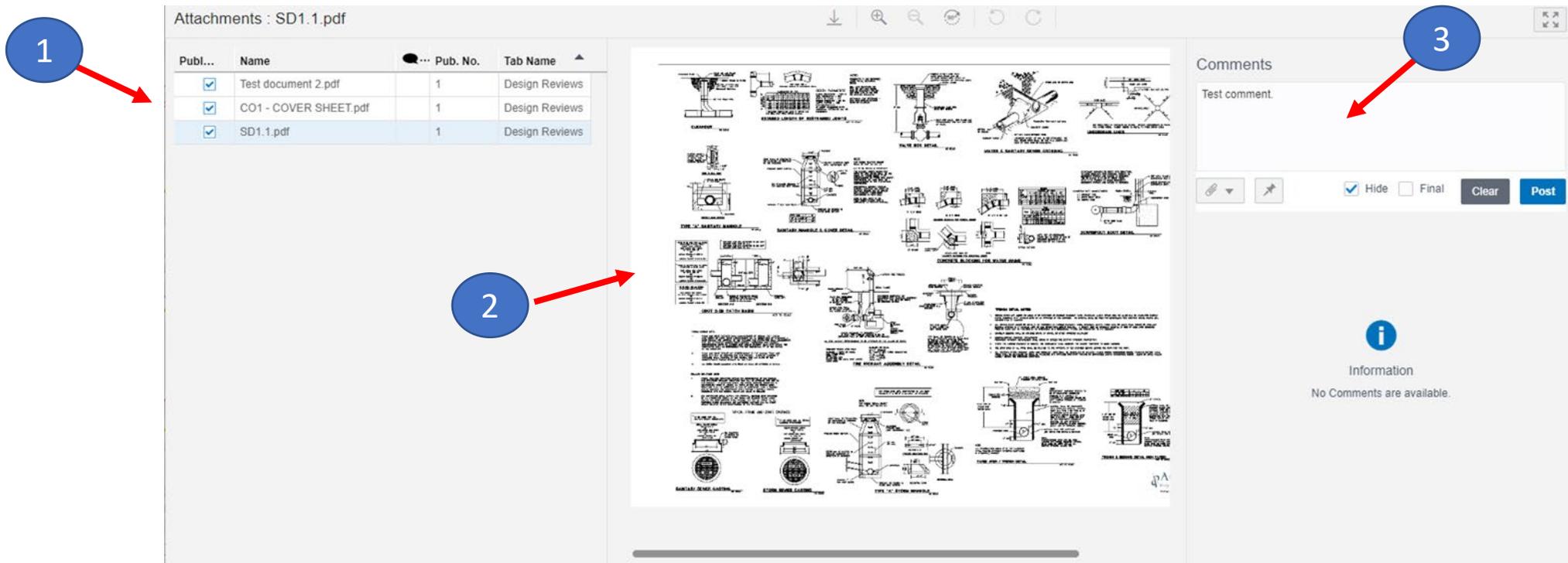
Name	Type	Status
Attachments		
Test document 2.pdf	Drawings	
SD1.1.pdf	Drawings	
CO1 - COVER SHEET.pdf	Drawings	



View Attachments – Initial Review (PM)

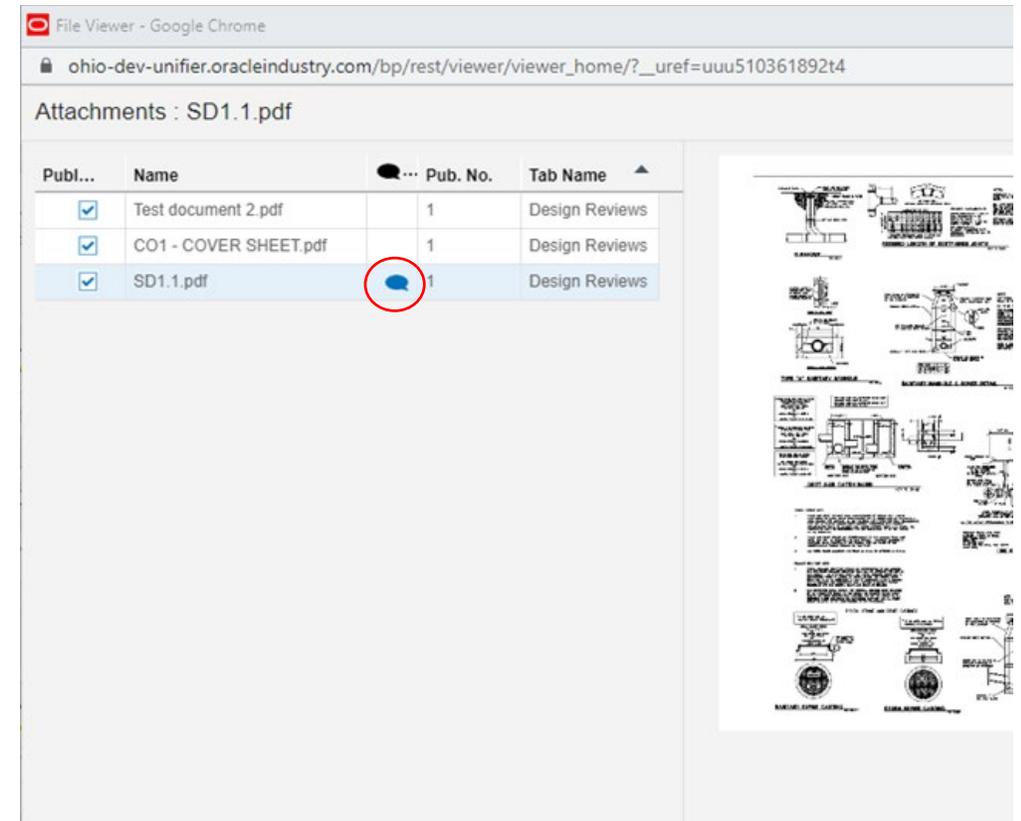
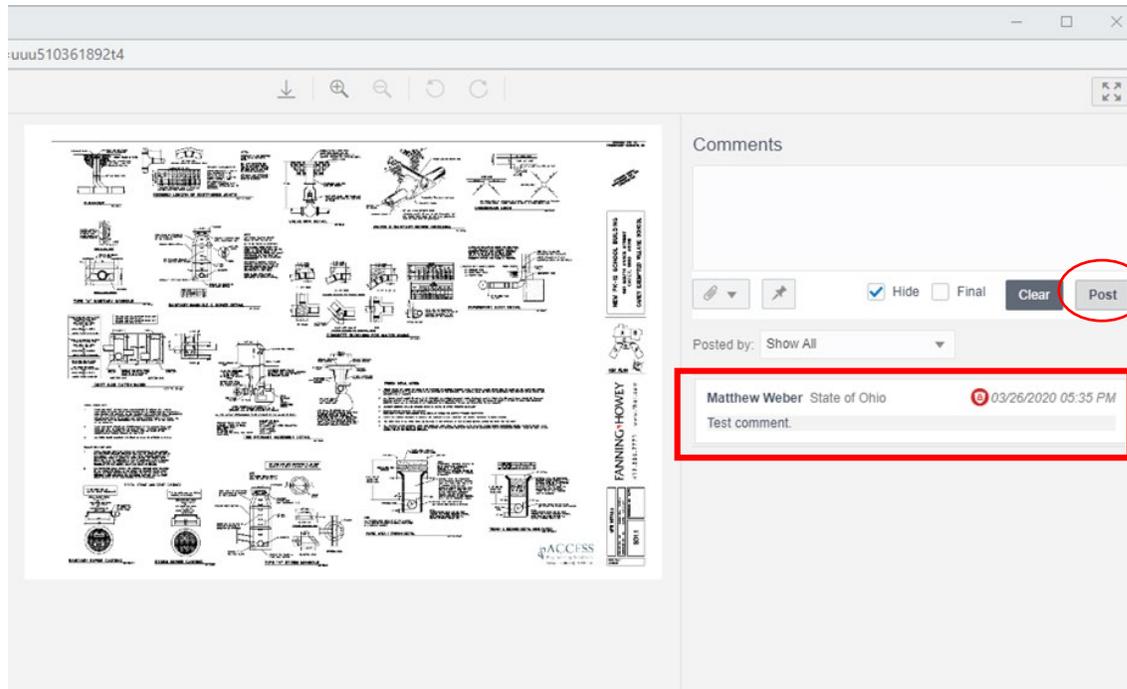
A new window will open to display the documents in three sections

1. The left section will display the attachments under the folder you've selected. Click each attachment to view details.
2. The middle section will display the document, this can be an image or text depending on the file
3. The right section will allow you to see and add comments to the selected document



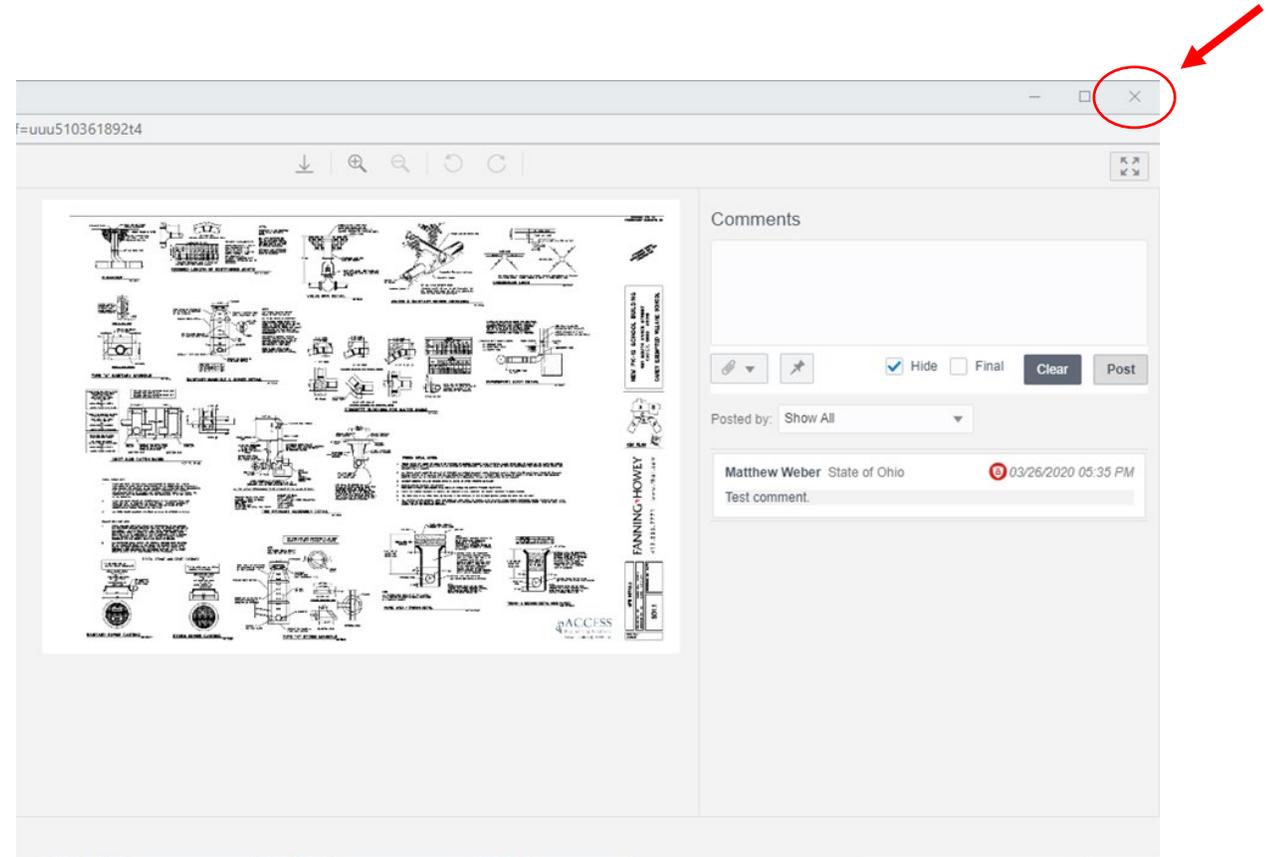
Add Comments – Initial Review (PM)

- ▶ After typing your comment, click the **Post** button
- ▶ The comment will display below and be linked to the attachment permanently
- ▶ Once any comment is added, a blue comment bubble will be visible next to the attachment



View Attachments – Initial Review (PM)

- ▶ When you are finished reviewing the attachments, close the window by clicking the **X** in the top right corner



Send Record – Initial Review (PM)

- ▶ When the Initial Review is complete, click the **Send** button at the top right corner of the record

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2573470/undefined/undefined?__uref=uuu936962708t1`. The page title is "Design Reviews". The record details are as follows:

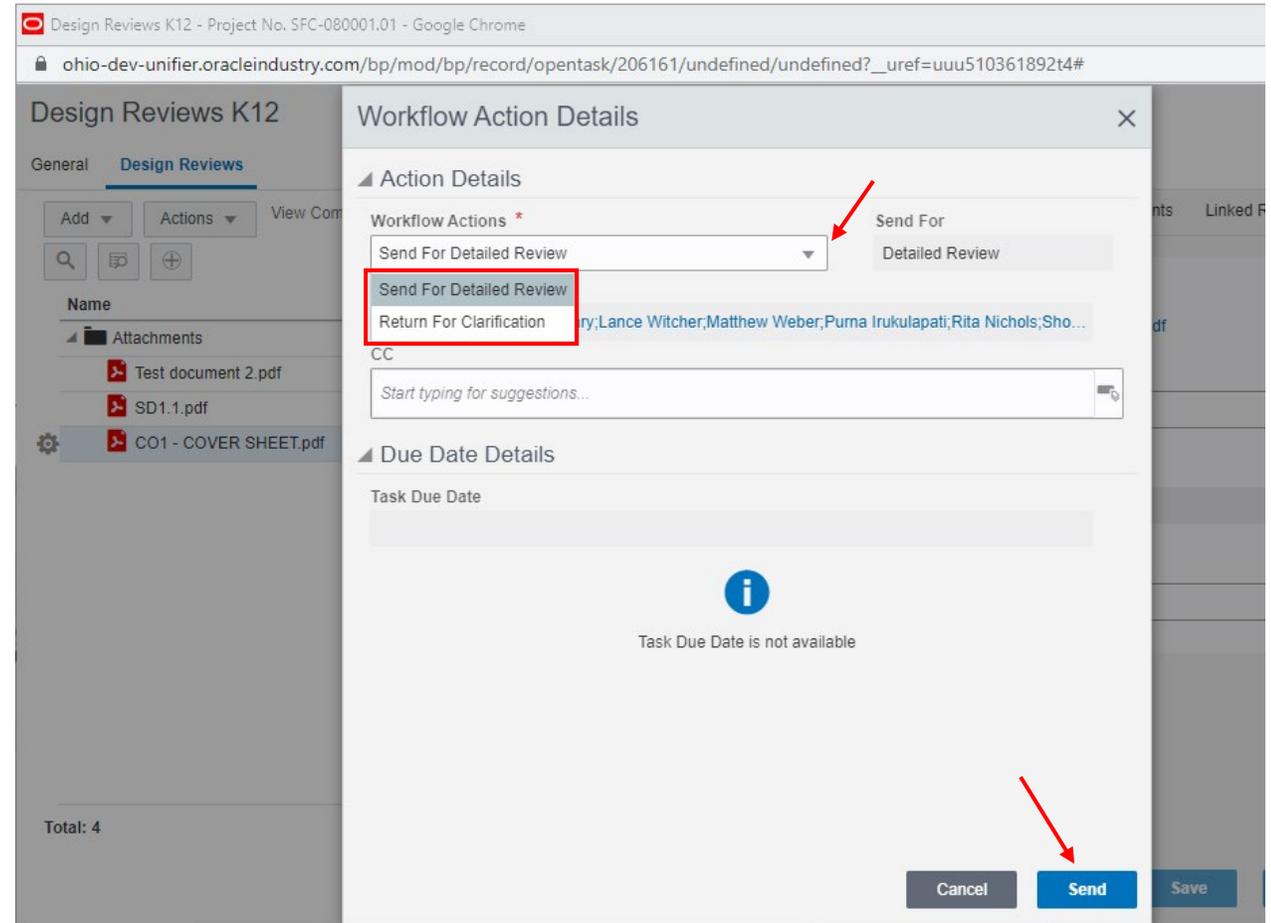
General	
Organization	Record Number
OAKS CI Test	DR-0009
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	03/26/2020 01:15 PM (UTC-5)
Project Location	Status
OAKS CI Administration	Pending
Est. Construction Cost (\$)	Owner Name
50,000.00	OAKS CI Test
Stage	Completion Status
Program Verification	50% (CD Only)

The "Send" button is circled in red and pointed to by a red arrow. The "Comments" section on the right shows "No Comments are available." and has "Clear" and "Post" buttons.



Send Record – Initial Review (PM)

- ▶ Select the **Workflow Action**
 - ▶ **Send for Detailed Review:** Sends the review to the PM for detailed review
 - ▶ **Return for Clarification:** Sends the review back to the A/E for update
- ▶ Click **Send**



Detailed Review (PM)



Receive Task – Detailed Review (PM)

- ▶ PM 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

Design Reviews DR-0009 is sent to you for Detailed Review.

From :	Shauna Hooks
Sent For :	Detailed Review
Task Due Date :	04/05/2020 02:03 PM (UTC-5)

Source Name :	Agency General Projects Test
Record No :	Design Reviews DR-0009
Title :	

[Unifier Login](#)



Open Task – Detailed Review (PM)

- ▶ After logging into the system, the PM will find the **Task** corresponding to the email
- ▶ Double click the **Task** to open

The screenshot shows the Primavera Unifier web interface. The browser address bar displays the URL: ohio-unifier.oracleindustry.com/bp/route/1/i-project_tasks?_... The page header includes the Oracle Primavera Unifier logo and navigation tabs for 'Agency General...' and 'OAKS CI Suppo...'. A left-hand navigation menu is visible, with 'Tasks' selected. The main content area is titled 'Tasks' and features a table of task entries. The first entry in the table is highlighted with a red box and a red arrow pointing to it. This entry is 'Agency General Proj... Design Reviews'. The table also shows other tasks such as 'Subcontractor/Su...', 'Professional Servi...', 'Contractor Pay R...', and 'Change Order'. At the bottom of the table, it indicates 'Total: 13'.

Origin	Business Pro...
Agency General Proj...	Design Reviews
Agency General Proj...	Subcontractor/Su...
Agency General Proj...	Professional Servi...
Agency General Proj...	Contractor Pay R...
Agency General Proj...	Professional Servi...
Agency General Proj...	Contractor Pay R...
Agency General Proj...	Professional Servi...
Agency General Proj...	Change Order
Agency General Proj...	Schedule Approvals
Agency General Proj...	Action Items
Agency General Proj...	Action Items



Accept Task – Initial Review (PM)

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



Review General Tab – Detailed Review (PM)

- ▶ Review the information in the General Tab
- ▶ Check the right pane to see if there are any General Comments attached

The screenshot displays a web browser window titled "Design Reviews - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2573470/undefined/undefined?_uref=uuu936962708t1". The page shows a "Design Reviews" header with "Send Save" and a menu icon. Below the header, the "General" tab is selected, and the "Comments" pane is visible on the right. A red arrow points to the "General" tab, and a red box highlights the "Comments" tab.

General	
Organization	Record Number
OAKS CI Test	DR-0009
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	03/26/2020 01:15 PM (UTC-5)
Project Location	Status
OAKS CI Administration	Pending
Est. Construction Cost (\$)	Owner Name
50,000.00	OAKS CI Test
Stage	Completion Status
Program Verification	50% (CD Only)

The right pane shows the "Comments" tab, which is currently empty. It includes a "Clear" button and a "Post" button. Below the comment area, there is an information icon and the text "Information No Comments are available."



Design Reviews – Detailed Review (PM)

- ▶ Click the **Design Reviews** tab to view attachments
- ▶ Single click an attachment to view **Line Item Details** in the right pane.

The screenshot shows a web application interface for 'Design Reviews K12'. The 'Design Reviews' tab is selected and circled in red. Below the tab are buttons for 'Add', 'Actions', and 'View Comments by: All'. A table lists attachments:

Name	Type	Status
Attachments		
Test document 2.pdf	Drawings	
SD1.1.pdf	Drawings	
CO1 - COVER SHEET.pdf	Drawings	

A red arrow points to the 'SD1.1.pdf' row. To the right, the 'Line Item Details' pane is open, showing the following information:

- Name: SD1.1.pdf
- Type: Drawings
- Line Item Status: Select
- Short Description: Design Drawings

At the bottom of the interface, there are buttons for 'Cancel', 'Save', and 'Save & Add New'. The total number of items is indicated as 'Total: 4'.



Change Line Item Status – Detailed Review (PM)

1. Click the arrow next to **Line Item Status**
2. Select a new status
3. Click **Save**
4. New status will display next to the attachment

Design Reviews K12 - Project No. SFC-080001.01 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/206191/undefined/undefined?__uref=uuu510361892t4

Design Reviews K12

General **Design Reviews**

Add Actions View Comments by: All

Name	Type	Status
Attachments		
Test document 2.pdf	Drawings	
SD1.1.pdf	Drawings	
CO1 - COVER SHEET.pdf	Drawings	

Total: 4

Line Item Details Attachments Linked Records

Name * SD1.1.pdf

Type Drawings

Line Item Status

Select

Accepted

Conforms

Conforms as Noted

Held

No Action Required

Received

Revise & Resubmit

Cancel Save Save & Add New

Design Reviews K12 - Project No. SFC-080001.01 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207194/undefined/undefined?__uref=uuu612327467t4

Design Reviews K12

General **Design Reviews**

Add Actions View Comments by: All

Name	Type	Status
Attachments		
SD1.1.pdf	Drawings	Accepted
Test document 2.pdf	Drawings	Accepted
CO1 - COVER SHEET.pdf	Drawings	Accepted

Total: 4

Line Item Details Attachments Linked Records

Name Test document 2.pdf

Type Drawings

Line Item Status Accepted

Short Description Design Drawings

Cancel Save



Send Record – Detailed Review (PM)

- ▶ When the Detailed Review is complete, click the **Send** button at the top right corner of the record

The screenshot displays a web browser window with the title 'Design Reviews K12 - Project No. SFC-080001.01 - Google Chrome'. The address bar shows the URL 'ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/206191/undefined/undefined?__uref=uuu510361892t4#'. The main content area is titled 'Design Reviews K12' and has a 'Send' button circled in red with a red arrow pointing to it. Below the title, there are tabs for 'General' and 'Design Reviews'. The 'General' tab is active, showing a form with the following fields:

General	
Project Number	Record Number
SFC-080001.01	DR-003
Project Name	Creator
Oak Hills Local Building Project	Matthew Weber
Organization Name	Creation Date
	03/26/2020 05:23 PM (UTC-5)
Facility Name	Status
	Pending
Est. Construction Cost (\$)	
50,000.00	
Stage	Completion Status
Program Verification	50% (CD Only)
FilePath	

On the right side of the record, there are tabs for 'Comments', 'Linked Records', 'Linked Mail', and 'Workflow Pr'. The 'Comments' tab is active, showing a 'Hide' checkbox, 'Clear', and 'Post' buttons. Below the comments section, there is an information icon and the text 'Information No Comments are available.'

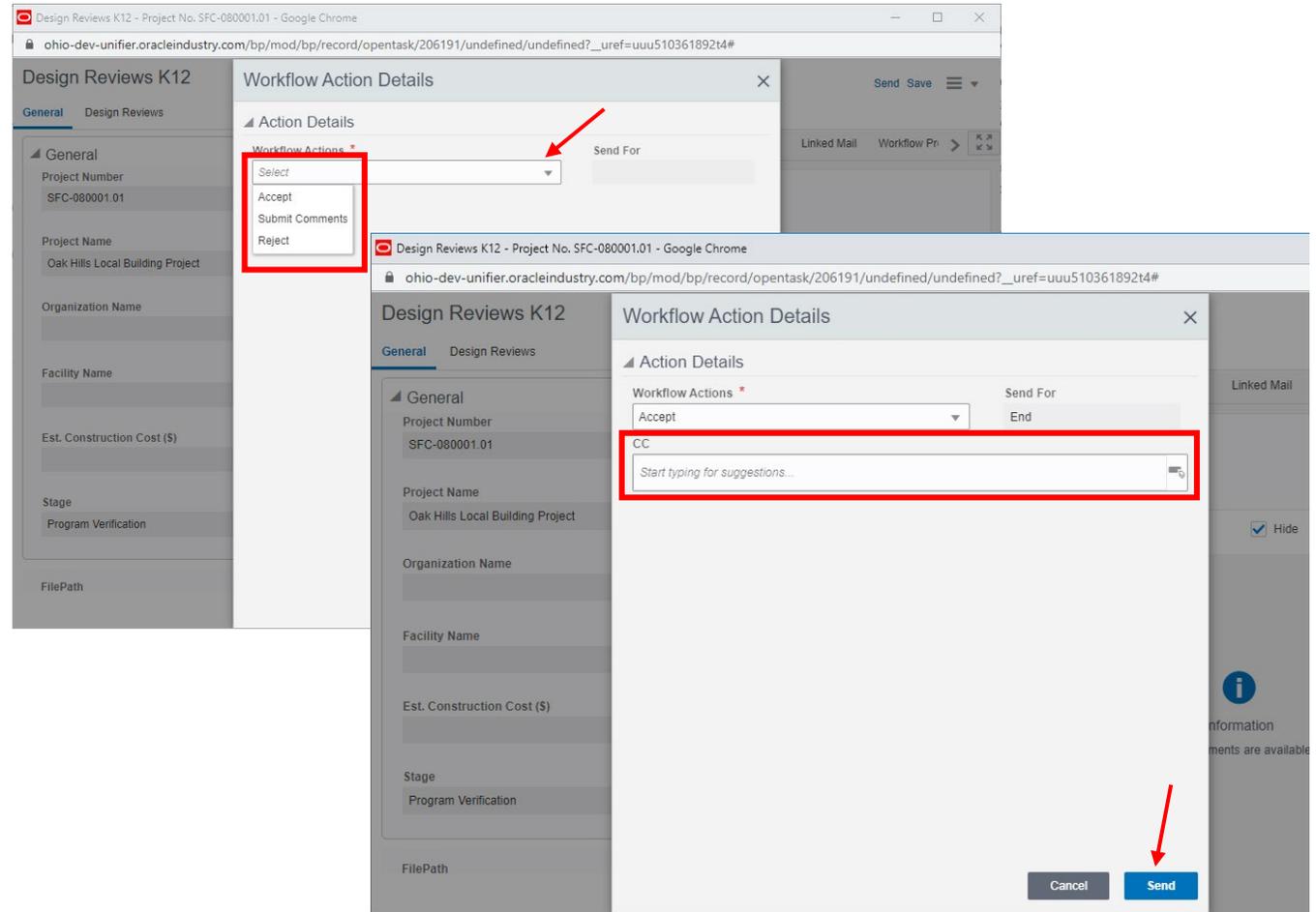


Send Record – Initial Review (PM)

- ▶ Select the **Workflow Action**

- ▶ **Accept:** Select to complete the Design Review Business Process. The **CC** field can be used to notify project members
- ▶ **Submit Comments:** Sends the review back to the A/E for Comment Response. **To** field will automatically populate.
- ▶ **Reject:** will end Record

- ▶ Click **Send**



Document Manager Uploading



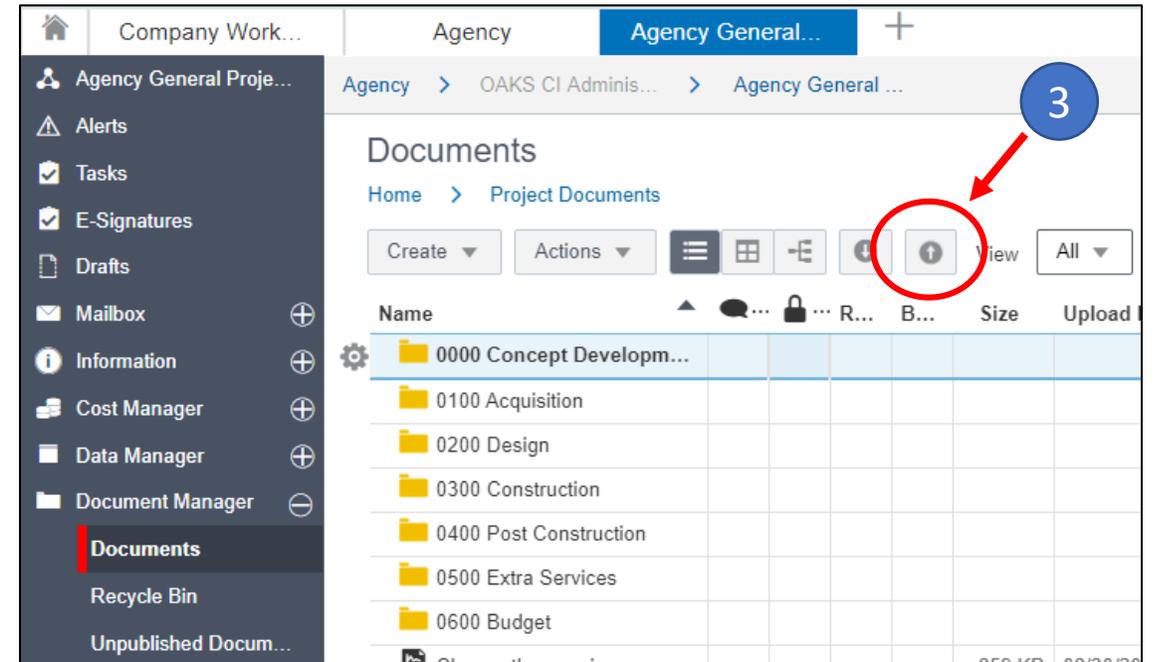
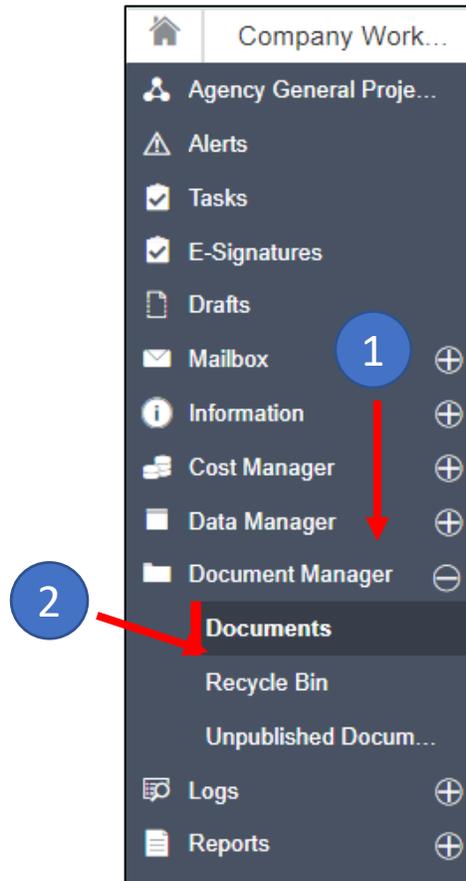
About Document Manager

- ▶ 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



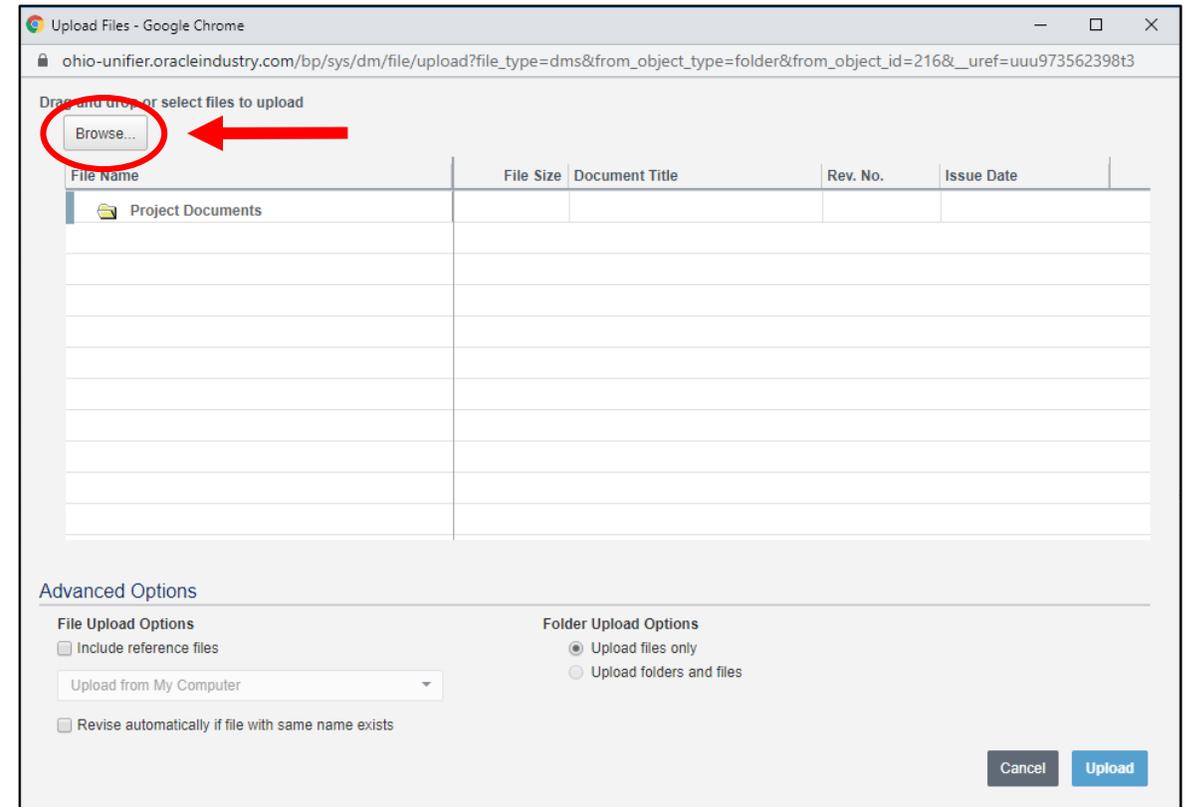
Document Upload

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



File Upload Window

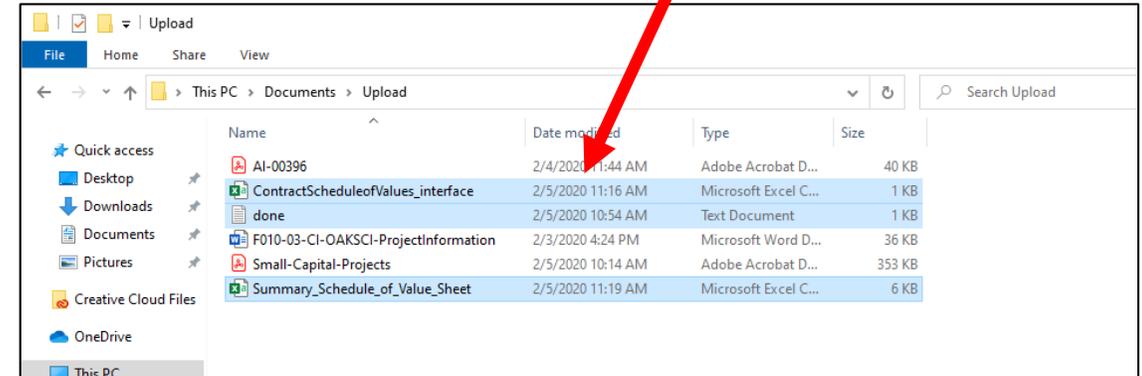
- ▶ A new window will appear for you to add files
- ▶ Click **Browse** to choose files for upload



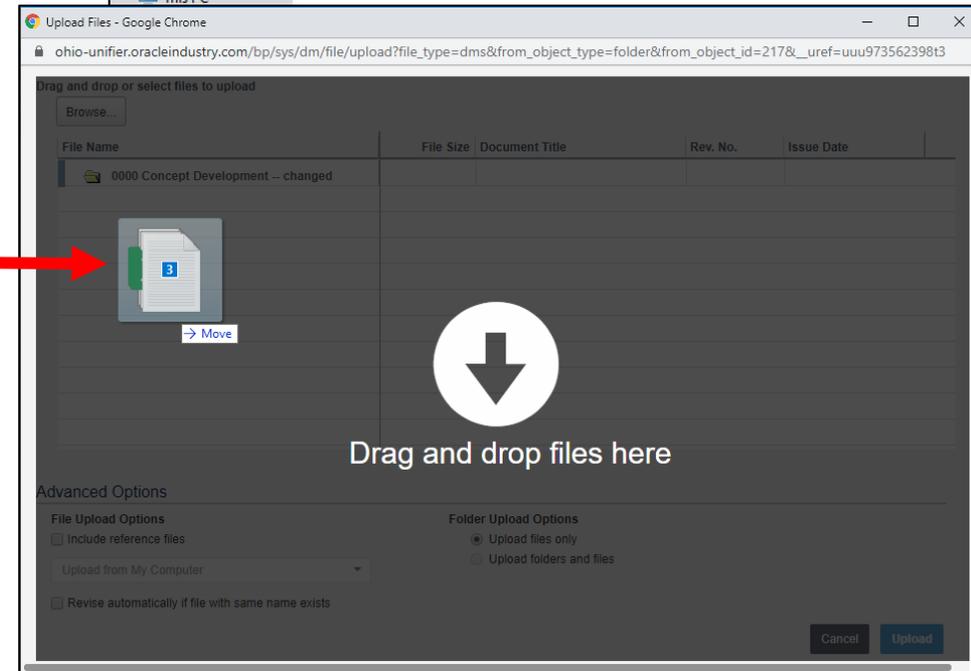
Drag and Drop files

- ▶ 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

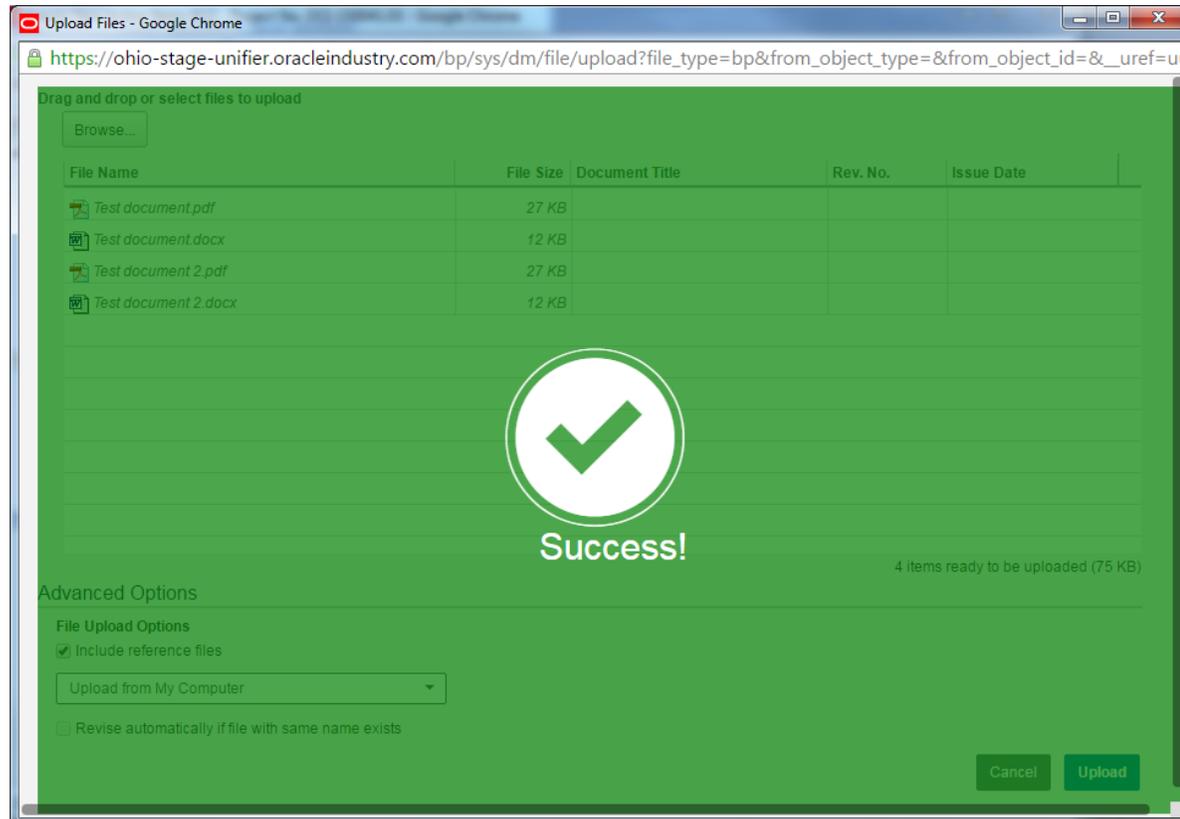


Drag and Drop the documents into the Upload Files window



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



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 the Oracle logo and the text 'Primavera Unifier'. Below this, there are tabs for 'Company Work...', 'Agency', and 'Agency General...'. The left sidebar contains a navigation menu with items like 'Agency General Proje...', 'Alerts', 'Tasks', 'E-Signatures', 'Drafts', 'Mailbox', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Documents', 'Recycle Bin', 'Unpublished Docum...', 'Logs', and 'Reports'. The main content area is titled 'Documents' and shows a list of documents. A red box highlights the toolbar above the list, which includes buttons for 'Create', 'Actions', 'View', 'All', 'Refresh', 'Star', 'Search', and 'Print'. A tooltip message is displayed over the Refresh button, stating: 'Files or folders have been successfully uploaded to the currently open Document Manager. To see the changes, click Refresh'.

Name	Issue Date
0000 Concept Developme...	
0100 Acquisition	
0200 Design	
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

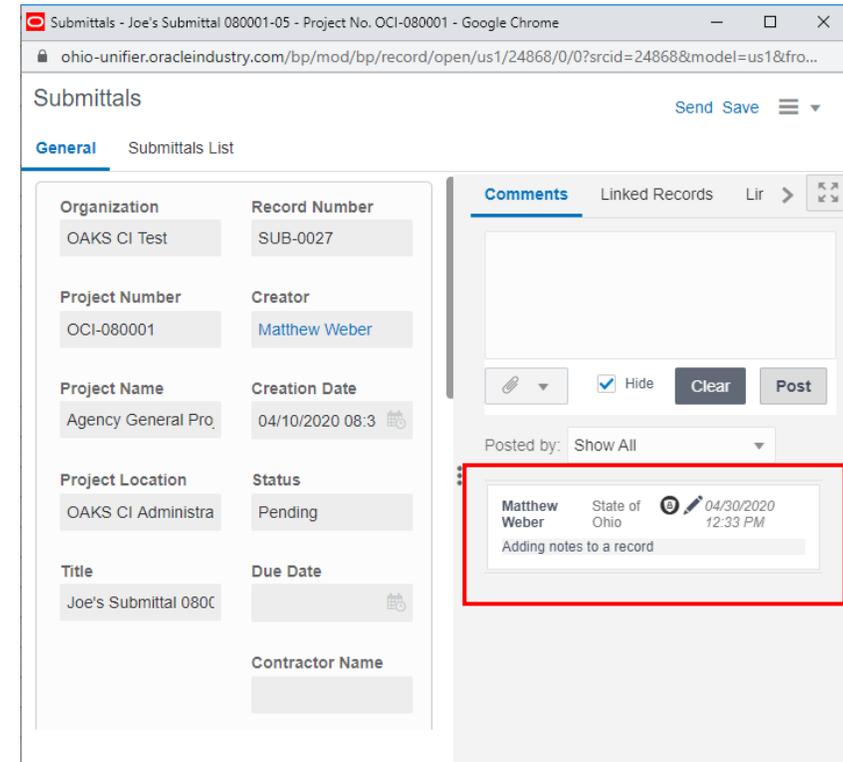
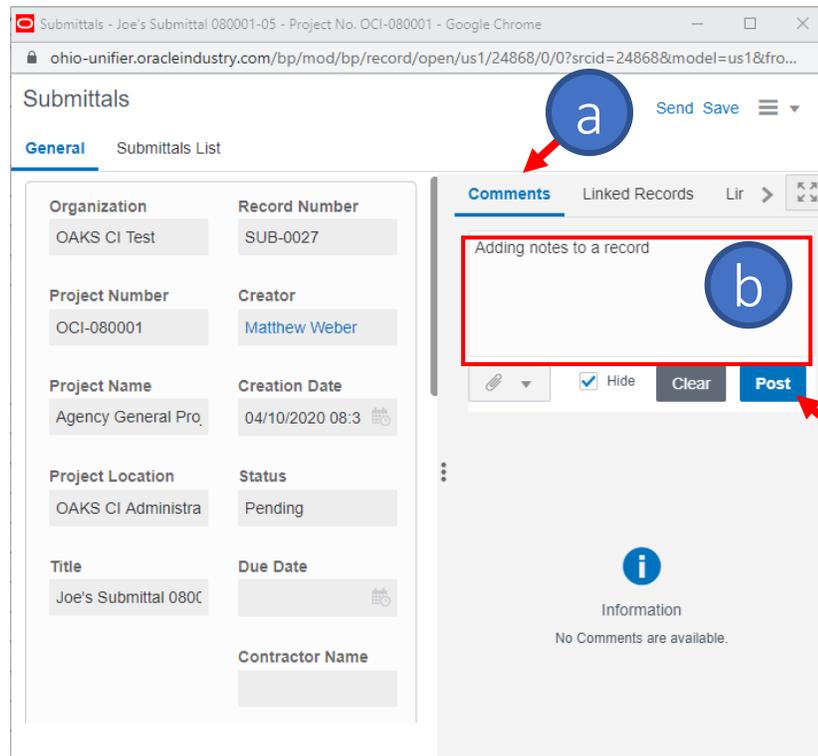


Add Comments to Records



Adding Comments are a good way to communicate with team members about a specific record

- Click the Comments tab Click Add
- Enter Comments
- Click Post
- The comment will display as a permanent part of the record



Questions?

Please contact OAKS CI Support Desk:

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614.644.2211

