



# Application for Payment (A/E, CxA, OA) K-12 Cloud

# 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 'ORACLE' and 'PRIMAVERA Unifier (Development)'. The main navigation menu on the left lists various options, with 'Logs' circled in red. A red arrow points from the 'Logs' option to the 'Applications for Payment K12' section in the sub-menu. 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

- ▶ All fields marked with a red \* are required
- ▶ Fill out any additional information

Applications for Payment K12 - Test - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=uafpk&fromSource=cost&fromModelId=7&t 110%

File Edit View Actions Help

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

### General Applications for Payment K12

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: <input type="text"/>
Project Number: SFC-080001	Creator: <a href="#">Katie Tuttle</a>
Organization Name: OAKS CI District Training Project - 1	Creation Date: <input type="text"/>
Facility Name: <input type="text"/>	Status: <input type="text"/>
Title: Test *	Request Date: <input type="text"/>
Contract Reference: SFC-080001-02-01 Test Select... *	Contractor Name: Dynamix Engineering
Final Payment?: No *	EDGE Certified Prime?: <input type="text"/>
Retainage Release Requested?: -Select-	Contract Type: Architect/Engineer
Period From: 02/01/2016 *	Period To: 02/29/2016 *
Internal Ref. Number: <input type="text"/>	Associate Approval Date: <input type="text"/>

#### Action Details

#### Pay Request Details

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

# Previous Pay Request

- ▶ Select whether this is the initial pay request
- ▶ If this is not your initial pay request, click select to choose previous pay request. **Very Important!**

Applications for Payment K12 - Test - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=uafpk&fromSource=cost&fromModelId=7&v 110%

File Edit View Actions Help

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

General Applications for Payment K12

**Previous Pay Request**

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

Initial Pay Request?: No

Previous Pay Request:  **Select...**\*

Period From:

**Stored Materials Summary**

On Site Stored Materials:

Off Site Stored Materials:

Installed Materials:

Previous Stored Materials:  \$0.00

This Period Stored Materials:  \$0.00

Current Stored Materials:  \$0.00

Action Details

Pay Request Details

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

Applications for Payment K12 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/picker?model=uafpk&pick

File View Help

Open Clear Find Close

Applications for Payment K12 - Current View: All Project Records

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

Title	Contract SOV	Contractor Name	Percent Complete	Total Payment Requested
03 District Training PR 02	03 District Training	Dynamix Engineering	0	30,000.00
03 District Training PR 01	03 District Training	Dynamix Engineering	0	20,000.00
SFC-080001-02-01 PR 1	SFC-080001-02-01	Dynamix Engineering	0	115,000.00

# Review SOV

- ▶ Prior to adding lines to your pay request, you may want to view the remaining balance on your SOV (Schedule of Values)
- ▶ Click SOV at the top of your window

Applications for Payment K12 - Test - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=uafpk&fromSource=cost&fromModelId=789 110%

File Edit View Actions Help

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

**General** Applications for Payment K12

**Previous Pay Request**

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

Initial Pay Request?: No

Previous Pay Request:  Select...\*

Previous PR Contractor:

Period From:  Period To:

**Stored Materials Summary**

On Site Stored Materials:	<input type="text" value="\$0.00"/>	Payment Allowed %:	<input type="text" value="92"/>
Off Site Stored Materials:	<input type="text" value="\$0.00"/>		
Installed Materials:	<input type="text" value="\$0.00"/>		

**Action Details**

**Pay Request Details**

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

# Review SOV

- ▶ This allows you to look at the Scheduled Value and Commits Remaining Balance for each of the line items on your SOV
- ▶ You can also export the SOV to Excel by clicking Export and choosing the Summary Schedule of Values Sheet

The screenshot shows a web browser window titled "Schedule of Values - Google Chrome" with the URL <https://ohio-unifier.oracleindustry.com/bp/psov/view/processing?docid=0&recordid=5595>. The browser's menu bar includes "File", "Edit", and "View". The "Export" option is circled in red, and a red arrow points to it. A dropdown menu is open, showing "Summary Schedule of Values Sheet" and "Breakdowns". The table below displays the SOV data with columns for Ref., WBS Item, WBS Code, Breakdown, Scheduled Value, Commits Remaining Balance, % Labor Complete, % Materials Complete, and Mater. The "Scheduled Value" and "Commits Remaining Balance" columns are highlighted with a red box. The table data is as follows:

Ref.	WBS Item	WBS Code	Breakdown	Scheduled Value	Commits Remaining Balance	% Labor Complete	% Materials Complete	Mater
1	Insurance	CE-01-IN		\$500.00	\$0.00	\$0.00	\$100.00	
2	Bond	CE-01-SB		\$800.00	\$800.00	\$0.00	\$0.00	
3	Setup Shed	CE-01-MBL		\$700.00	\$700.00	\$0.00	\$0.00	
4	Shed	CE-01-MBM		\$500.00	\$40.00	\$0.00	\$0.00	
5	Earthwork	CE-SI-31L		\$1,500.00	\$1,200.00	\$20.00	\$0.00	
6	Equipment Rental	CE-SI-31M		\$1,200.00	\$960.00	\$0.00	\$20.00	
7	Concrete Foundation	CE-FC-03L		\$8,000.00	\$8,000.00	\$0.00	\$0.00	
8	Foundation Material	CE-FC-03M		\$4,200.00	\$4,200.00	\$0.00	\$0.00	
9	Block/Stone Walls	CE-FC-04L		\$5,500.00	\$5,500.00	\$0.00	\$0.00	
10	Wall Materials	CE-FC-04M		\$4,100.00	\$4,100.00	\$0.00	\$0.00	
11	Paint	CE-FC-07L		\$500.00	\$500.00	\$0.00	\$0.00	
12	Paint	CE-FC-07M		\$0.00	\$0.00	\$0.00	\$0.00	
Total \$				\$27,500.00	\$26,000.00	\$20.00	\$120.00	

At the bottom of the browser window, there is a text input field containing `javascript:psovsheetExport('summary')` and buttons for "Apply", "OK", and "Close".

# Review SOV

- ▶ This is how your SOV will look in Excel
- ▶ **Note:** This file is for reference only. It cannot be re-imported into OAKS CI

Summary\_Schedule\_of\_Value\_Sheet (6) - Excel

Column: All

Note: This file is for reference only. The contents of this file cannot be modified and re-imported into the Schedule of Value Sheet.

Line Item	WBS Item	WBS Code Breakdown	Scheduled Value	Commits Remaining Balance	% Labor Complete	% Materials Complete
1	Insurance	CE-01-IN	\$500.00	\$0.00	\$0.00	\$100.00
2	Bond	CE-01-SB	\$800.00	\$800.00	\$0.00	\$0.00
3	Setup Shed	CE-01-MBL	\$700.00	\$700.00	\$0.00	\$0.00
4	Shed	CE-01-MBM	\$500.00	\$40.00	\$0.00	\$0.00
5	Earthwork	CE-SI-31L	\$1,500.00	\$1,200.00	\$20.00	\$0.00
6	Equipment Rental	CE-SI-31M	\$1,200.00	\$960.00	\$0.00	\$20.00
7	Concrete Foundation	CE-FC-03L	\$8,000.00	\$8,000.00	\$0.00	\$0.00
8	Foundation Material	CE-FC-03M	\$4,200.00	\$4,200.00	\$0.00	\$0.00
9	Block/Stone Walls	CE-FC-04L	\$5,500.00	\$5,500.00	\$0.00	\$0.00
10	Wall Materials	CE-FC-04M	\$4,100.00	\$4,100.00	\$0.00	\$0.00
11	Paint	CE-FC-07L	\$500.00	\$500.00	\$0.00	\$0.00
12	Paint	CE-FC-07M	\$0.00	\$0.00	\$0.00	\$0.00

# Add Line Items

- ▶ Enter a line item corresponding to each item on the Schedule of Values (SOV) from the agreement for which payment is requested
- ▶ Click on the **Pay Request Details** Tab
- ▶ Click Add

Applications for Payment K12 - Test - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=uafpk&fromSource=cost&fromModelId=7&v 110%

File Edit View Actions Help

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

**General** Applications for Payment K12

**Action Details**

**Pay Request Details**

Current View: All

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

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	DP
-----	----------	--------------------------	-----------------	-------------------	--------------------	------------------	----------------------	---------------------	----

Reiml

Add Copy Import Remove Find Show Filtered Total Amount Total Amount: \$0.00

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



# Add Line Items

- ▶ Enter a short description
  - ▶ Enter the % complete in the % Services Complete column
- OR**
- ▶ For a DPE or Reimbursable enter the **dollar amount** under the DPE or Reimbursable Column

Line Items - Google Chrome  
https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/opengrid?pref=ucsov&unit\_price\_check=1&from=&strModifiedRows=&model=uafpk&printable=5&coID=156

Split Cancel Row Changes

Line Items Page 1 of 1 Display 100 items per page

Ref.	SOV Reference Number	WBS Code *	WBS Item	Short Description *	Subcode	Scheduled Value	% Labor	% Materials	% Services Complete	DPE or Reimbursables(\$)				
001	1	AE-BS-CA	Building 1			\$115,000.00	0	0	20	\$0.00				
002	2	AE-BS-CA	Building 2			\$115,000.00	0	0	20	\$0.00				
003	3	AE-BS-CA	Building 3			\$115,000.00	0	0	20	\$0.00				
004	4	AE-BS-CA	Building 4			\$115,000.00	0	0	20	\$0.00				
005	5	AE-BS-CA	Building 5			\$115,000.00	0	0	20	\$0.00				
Total						0				\$575,000.00	0	0	100	\$0.00

OK Cancel

# Add Line Items

- ▶ Continue Adding Line Items as necessary
- ▶ Line item information displays in the Pay Request Details Pane
- ▶ **Please Note:** The **Earned this Period** column should **NEVER** reflect a negative amount

Applications for Payment K12 - Test - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=uafpk&fromSource=cost&fromModelId=7&v 110%

File Edit View Actions Help

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

General Applications for Payment K12

Action Details

**Pay Request Details**

Current View: All

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

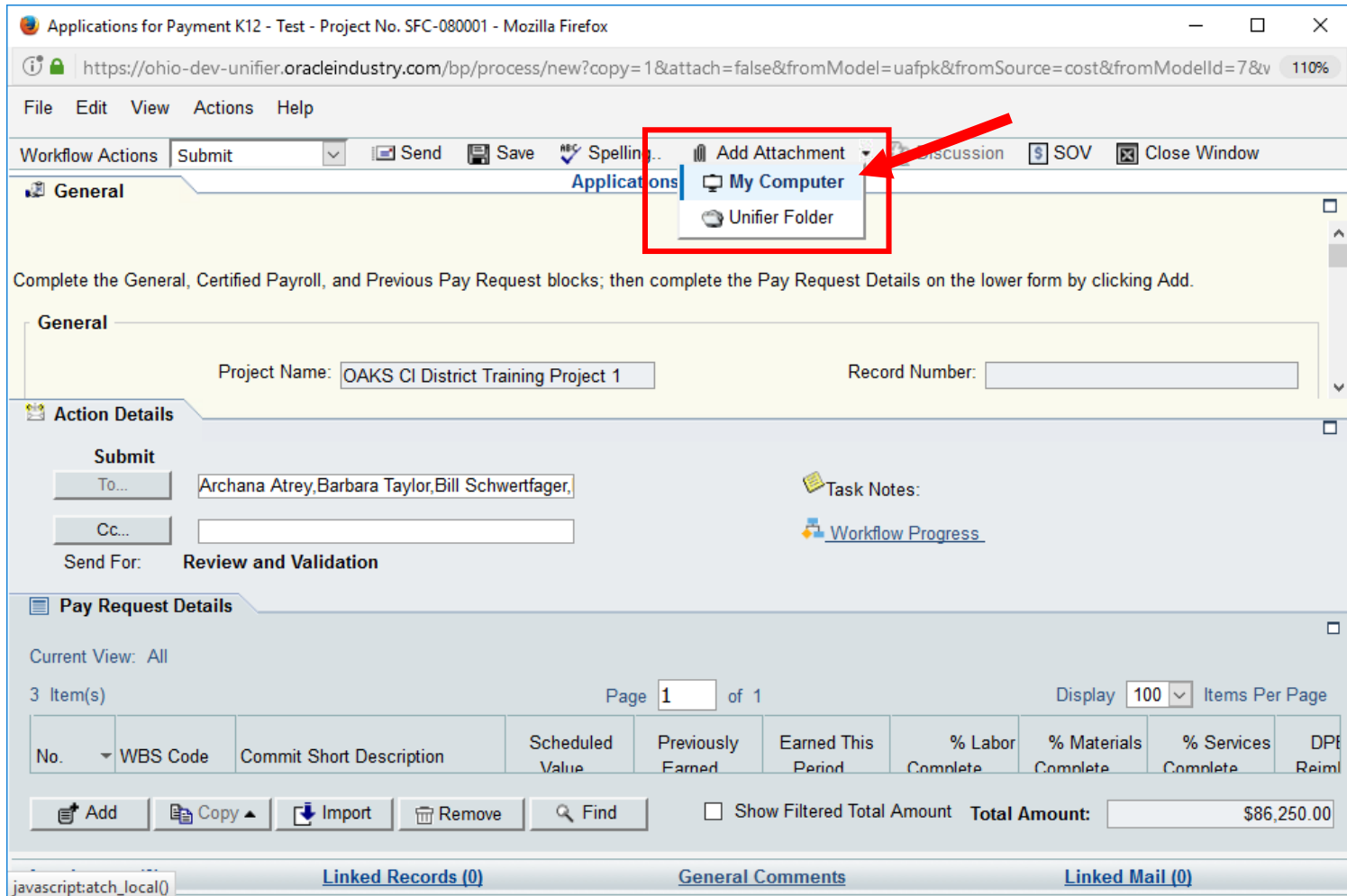
No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	DPf Reiml
003	AE-BS-CA	Building 4	\$115,000.00	\$57,500.00	\$28,750.00	0	0	75	
002	AE-BS-CA	Building 3	\$115,000.00	\$57,500.00	\$28,750.00	0	0	75	
001	AE-BS-CA	Building 2	\$115,000.00	\$57,500.00	\$28,750.00	0	0	75	

Add Copy Import Remove Find Show Filtered Total Amount **Total Amount:** \$86,250.00

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

# Add Attachments

- ▶ To add any additional documentation
  - ▶ Click Add Attachment
  - ▶ Choose My Computer and locate your documents
  - ▶ Drag and Drop documents to upload



The screenshot shows a web browser window with the title "Applications for Payment K12 - Test - Project No. SFC-080001 - Mozilla Firefox". The address bar shows the URL: <https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=uafpk&fromSource=cost&fromModelId=7&v>. The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". The application's toolbar contains "Workflow Actions", "Submit", "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The "Add Attachment" dropdown menu is open, showing three options: "Applications", "My Computer", and "Unifier Folder". A red box highlights the "My Computer" option, and a red arrow points to it from the right. Below the toolbar, the "General" tab is active, showing a form with "Project Name: OAKS CI District Training Project 1" and "Record Number:". The "Action Details" section includes a "Submit" button, a "To..." field with "Archana Atrey, Barbara Taylor, Bill Schwertfager," and a "Cc..." field. The "Send For:" field is set to "Review and Validation". The "Pay Request Details" section shows a table with 3 items, a page number of 1, and a total amount of \$86,250.00. The table has columns for "No.", "WBS Code", "Commit Short Description", "Scheduled Value", "Previously Earned", "Earned This Period", "% Labor Complete", "% Materials Complete", "% Services Complete", and "DPF Reiml".

# Submit Record

- ▶ Attachments populate at the bottom of your record
- ▶ Verify Workflow Action
- ▶ Action Details will auto-populate the “To” field
- ▶ Click Send

Applications for Payment K12 - Test - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/newCopy=1&attach=false&fromModel=uafpk&fromSource=cost&fromModelId=7&v 110%

File Edit View Actions Help

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

Applications for Payment K12

General

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: Katie Tuttle

Action Details

Submit

To... Archana Atrey, Barbara Taylor, Bill Schwertfager,

Cc...

Send For: Review and Validation

Task Notes:

Workflow Progress

Pay Request Details

Current View: All

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

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	DPF Reiml

Add Copy Import Remove Find Show Filtered Total Amount Total Amount: \$86,250.00

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211