



Introduction to OAKS CI

October, 2020

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



What does OAKS CI do for you?

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



System Navigation



Browser Information

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



Chrome



mozilla
Firefox[®]

Navigate to OAKS CI

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

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

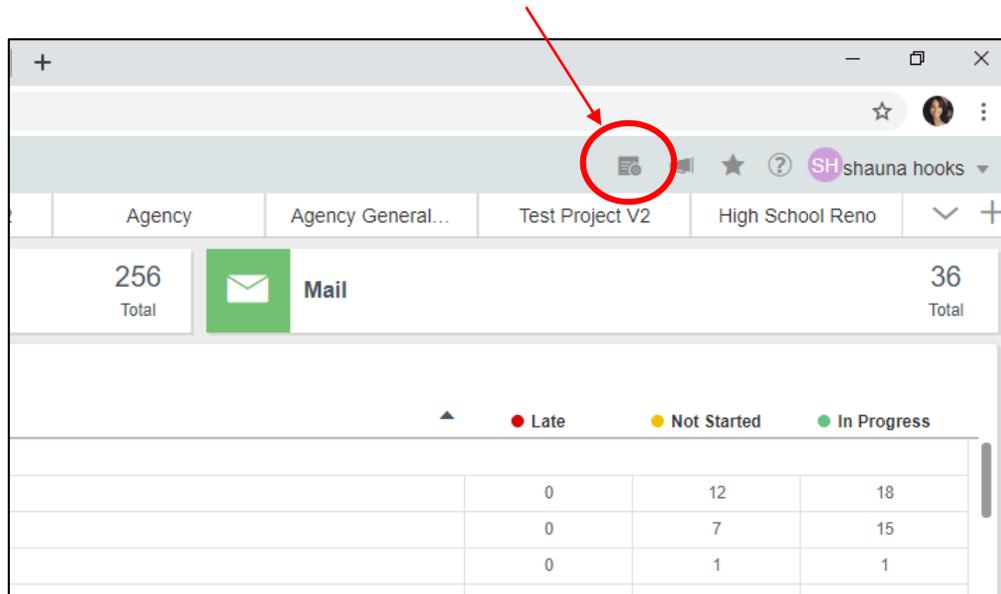


Important Notice – View Changes

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

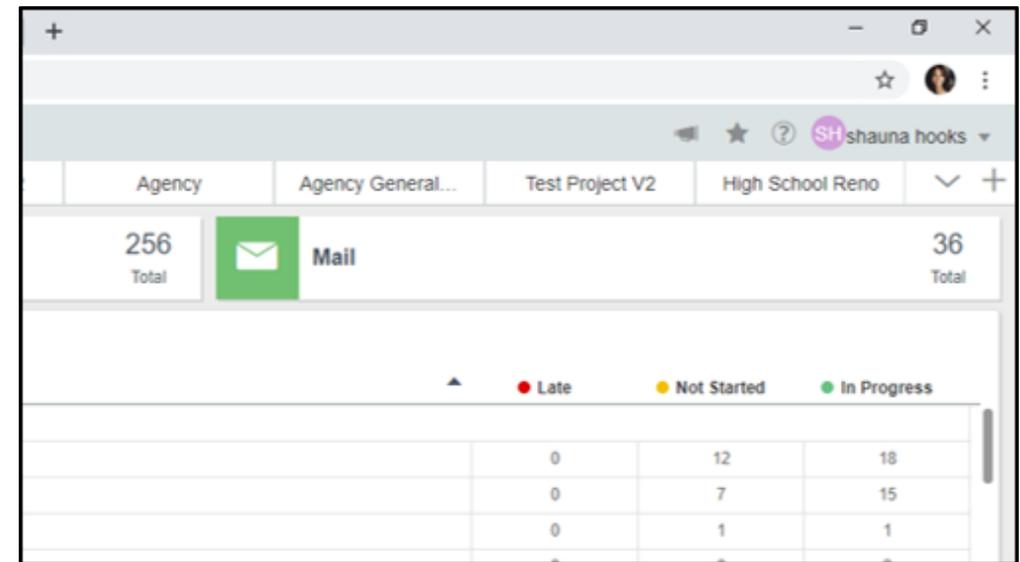
Previously, you could switch between views with the button near the top right of your OAKS CI screen. When clicked, your view would toggle between the **Old View** and **New UI View**.

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



A screenshot of the OAKS CI web interface. A red circle highlights a toggle button in the top right corner of the header area, with a red arrow pointing to it. The interface shows a navigation bar with tabs for 'Agency', 'Agency General...', 'Test Project V2', and 'High School Reno'. Below the navigation bar, there is a 'Mail' section with a green envelope icon, showing '256 Total' on the left and '36 Total' on the right. Below the mail section, there is a table with columns for 'Late', 'Not Started', and 'In Progress'.

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



A screenshot of the OAKS CI web interface, identical to the previous one, but without the toggle button circled in red. The interface shows the same navigation bar, 'Mail' section, and table.

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

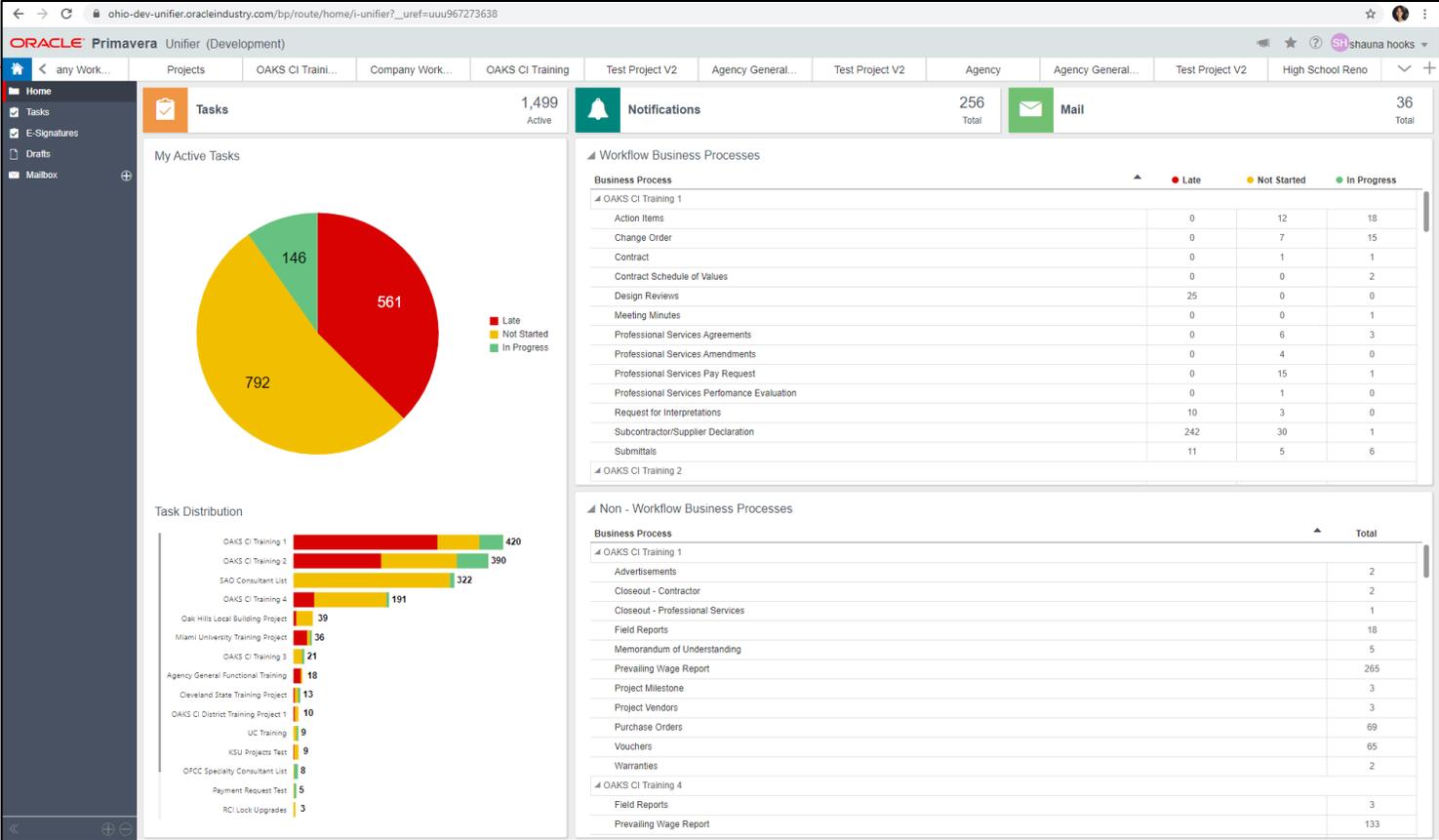
New User Interface (UI) View

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



Home Page

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



The screenshot displays the Oracle Primavera Unifier Home Page. A red arrow points to the Home button in the left-hand navigation menu. The main content area shows 'My Active Tasks' with a pie chart and 'Task Distribution' with a horizontal bar chart. The right-hand side displays 'Workflow Business Processes' and 'Non - Workflow Business Processes' with summary tables.

My Active Tasks

Status	Count
Late	561
Not Started	792
In Progress	146

Task Distribution

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

Workflow Business Processes

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

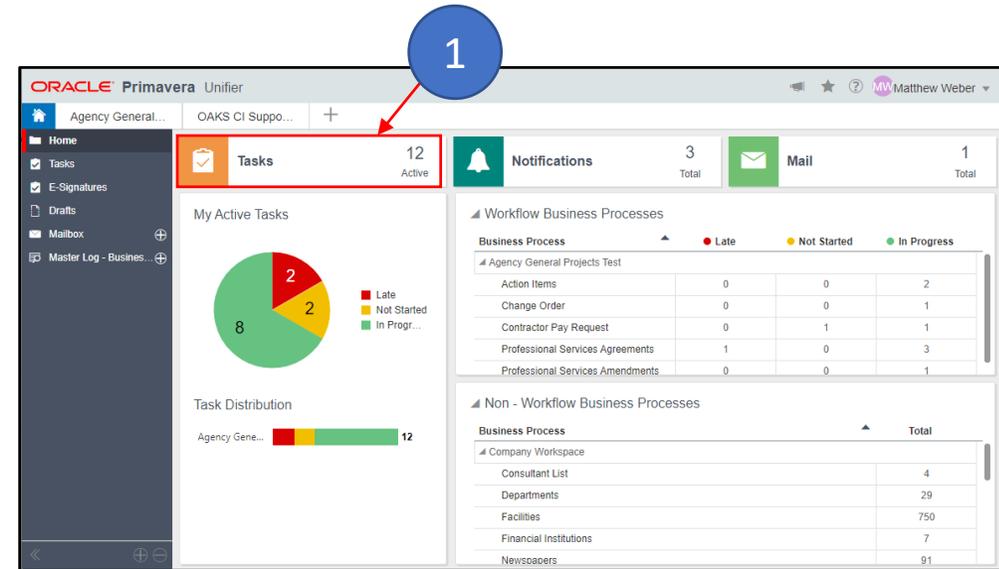
Non - Workflow Business Processes

Business Process	Total
OAKS CI Training 1	
Advertisements	2
Closeout - Contractor	2
Closeout - Professional Services	1
Field Reports	18
Memorandum of Understanding	5
Prevailing Wage Report	265
Project Milestone	3
Project Vendors	3
Purchase Orders	69
Vouchers	65
Warranties	2
OAKS CI Training 4	
Field Reports	3
Prevailing Wage Report	133

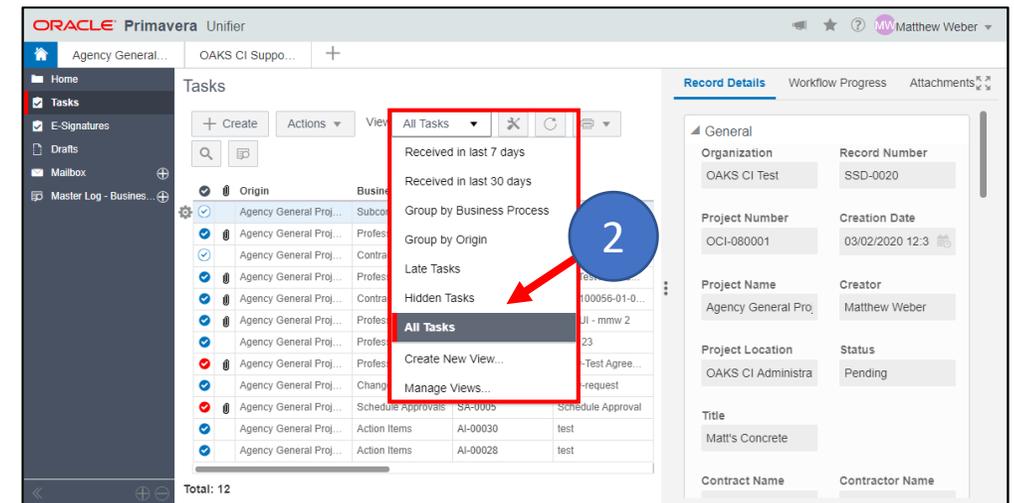


Home Page – Tasks

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



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



Find your Project

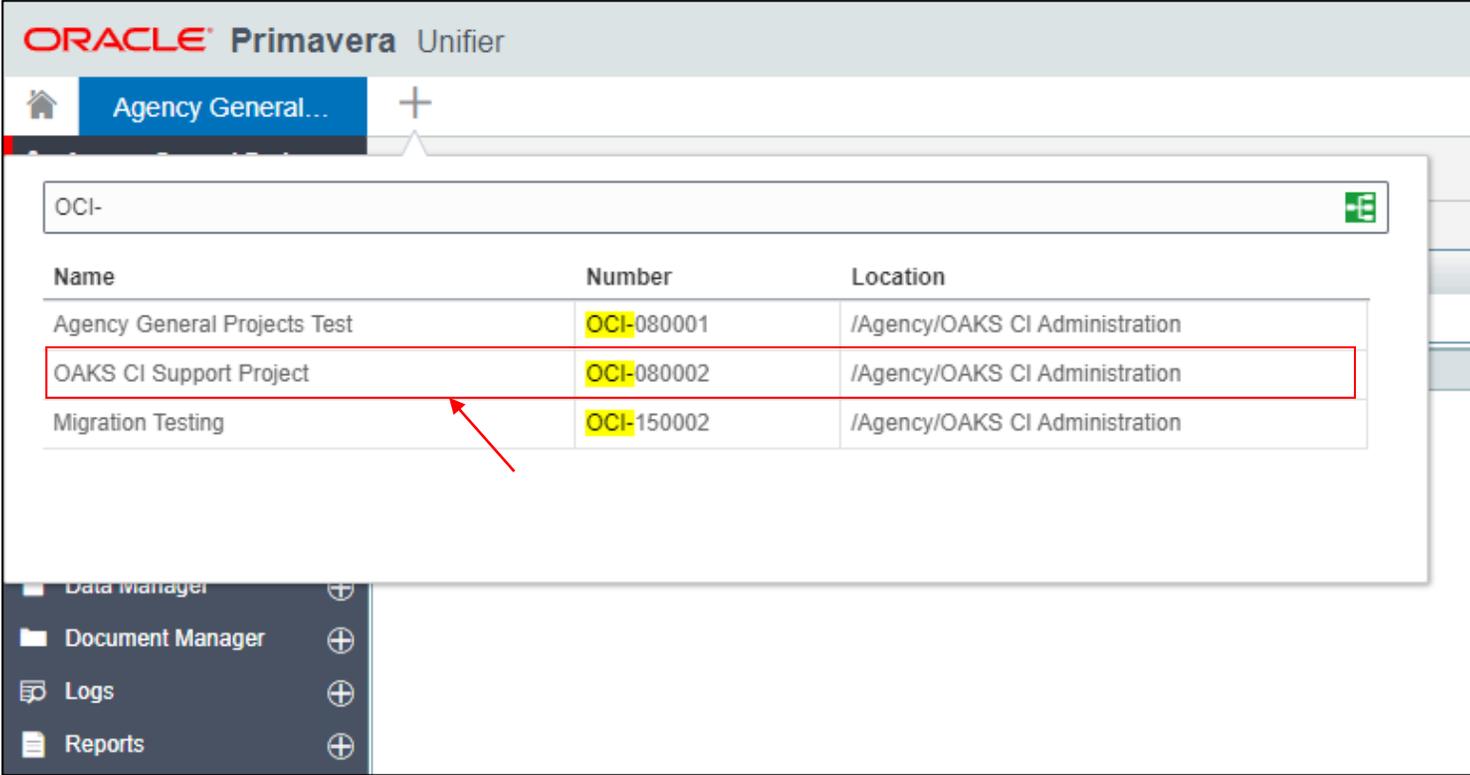
- ▶ To locate your project, click on the + sign to the right of the home or project tabs
- ▶ In the secondary screen you will see a search box, a list of Recent Locations, Bookmarks, and Key Locations
- ▶ Click inside the search box

The screenshot displays the Oracle Primavera Unifier interface. At the top, the title bar reads "ORACLE Primavera Unifier". Below this, there is a navigation bar with a home icon and a tab labeled "Agency General...". To the right of the tab is a red "+" sign, which is circled in red. A red arrow points from this "+" sign to a search box below. The search box contains the placeholder text "Search by Name or Number..." and a magnifying glass icon. Below the search box, there are three columns of project locations: "Recent Locations", "Bookmarks", and "Key Locations". Each column lists several project names, such as "Agency General Projects Test", "Migration Testing - OCI-150002...", and "Company Workspace". At the bottom of the interface, there is a footer area with the text "Administrator: Steve Mayo" and "Currency: United States Dollar (USD)".



Find your Project

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



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

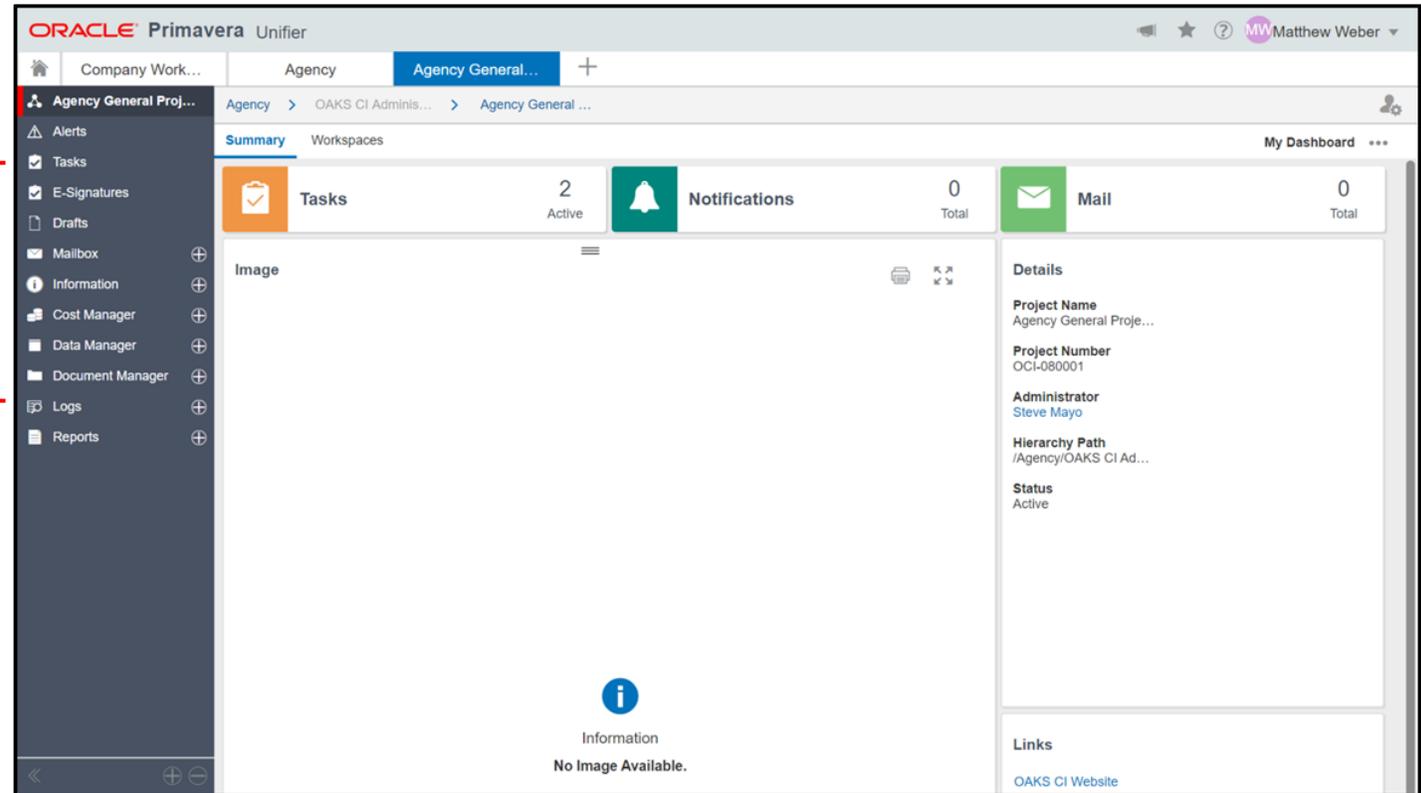
Name	Number	Location
Agency General Projects Test	OCH080001	/Agency/OAKS CI Administration
OAKS CI Support Project	OCH080002	/Agency/OAKS CI Administration
Migration Testing	OCH150002	/Agency/OAKS CI Administration

A red box highlights the 'OAKS CI Support Project' row, and a red arrow points to it from below. At the bottom of the interface, there is a sidebar with icons and labels for 'Data Manager', 'Document Manager', 'Logs', and 'Reports'.



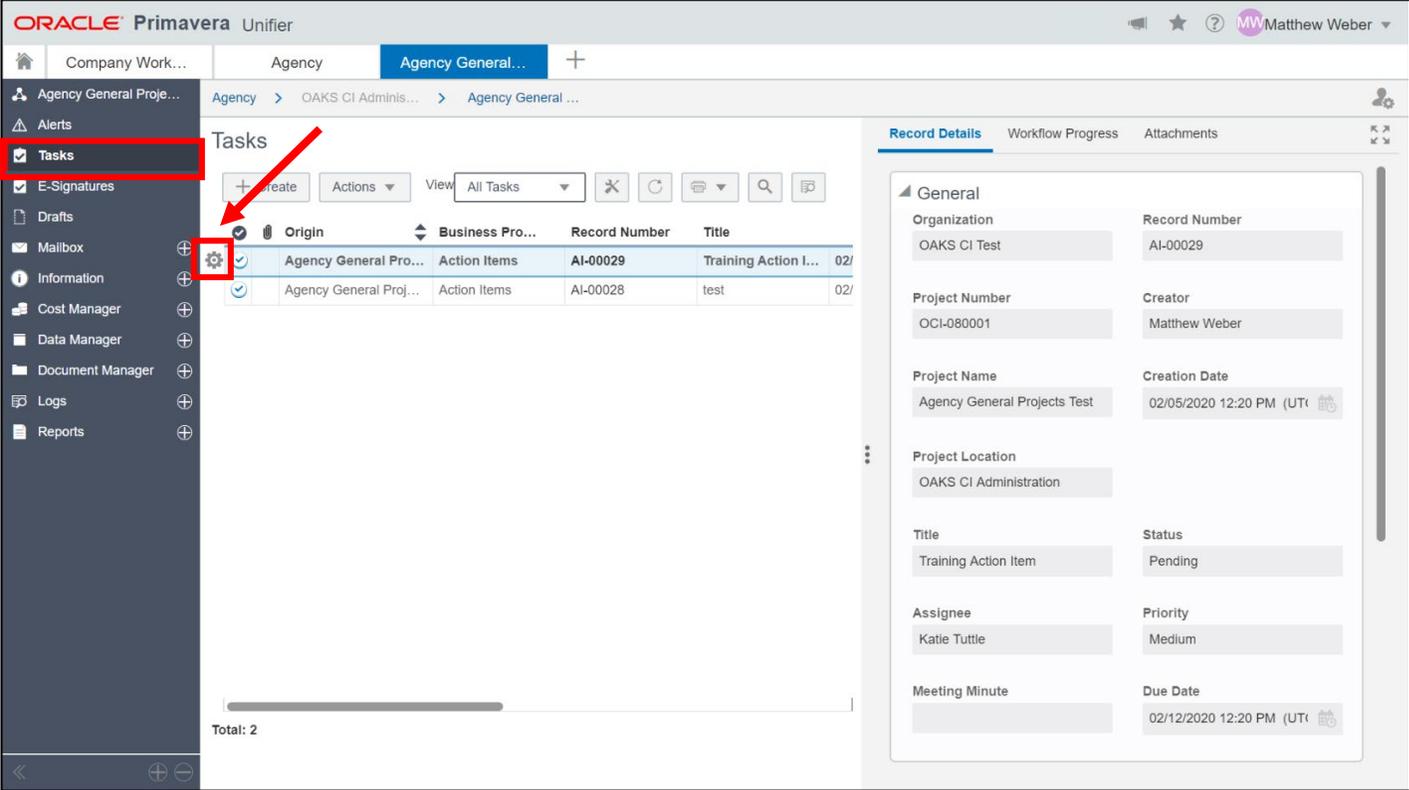
Project Home Page

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



Tasks (Your Work)

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



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

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

Total: 2

Record Details

General

Organization: OAKS CI Test
Record Number: AI-00029

Project Number: OCI-080001
Creator: Matthew Weber

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

Project Location: OAKS CI Administration

Title: Training Action Item
Status: Pending

Assignee: Katie Tuttle
Priority: Medium

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



Drafts

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

The screenshot shows the Primavera Unifier interface. On the left is a navigation menu with 'Drafts' highlighted in red. A red arrow points from this menu item to the 'Drafts' table in the main content area. The table has columns for Business Process, Record Number, Title, Last Saved, and Discussion. One record is selected, and its details are shown in a right-hand pane, which is also outlined in red. The details pane shows fields for Organization, Project Name, Project Number, Project Location, Title, Contract Reference, Final Payment?, Retainage Release Requested?, Period From, and Period To.

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

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



Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

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

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

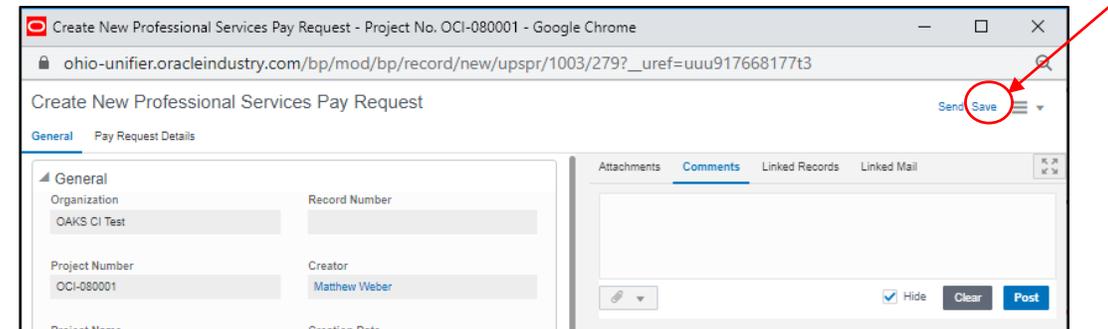
Old View:

Save was found at the top left of the record



New View:

Save is found at the top right of the record



Mailbox – Notifications

Within your Mailbox you will find Notifications

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

ORACLE Primavera Unifier

Agency General Projects ...

Agency > OAKS CI Adminis... > Agency General ...

Notifications

Actions View All Notifications

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

Total: 3

Record Details

Workflow Prog... At

General

Organization: OAKS CI Test, Record Number: CSOV-0008

Project Number: OCI-080001, Creator: Shauna Hooks

Project Name: Agency General P, Creation Date: 02/12/2020 02

Project Location: OAKS CI Administ, Status: Approved

Title: Test SOV, Fee Title: OFCC Standard F

Contract Information

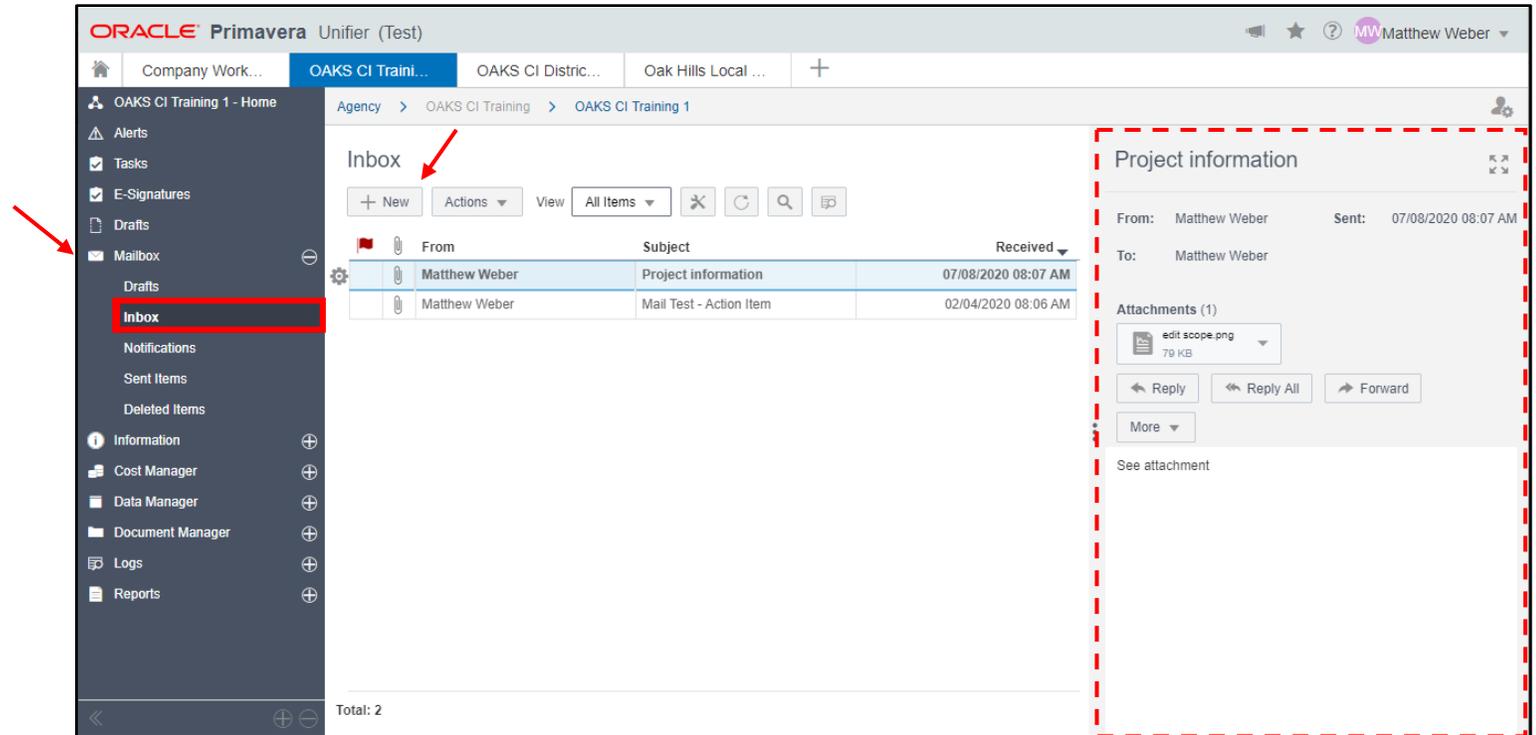
Contract No.: test, Contractor Name: OCI Test General



Mailbox – Inbox

Within your Mailbox you will also find your Inbox

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



Document Manager Uploading



About Document Manager

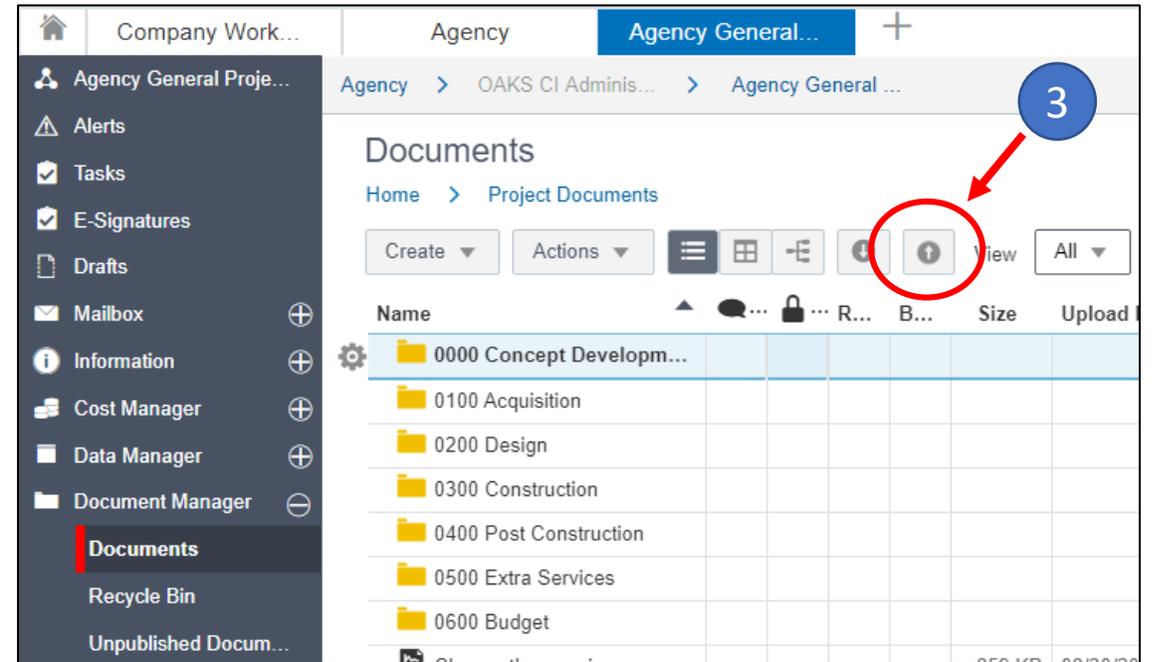
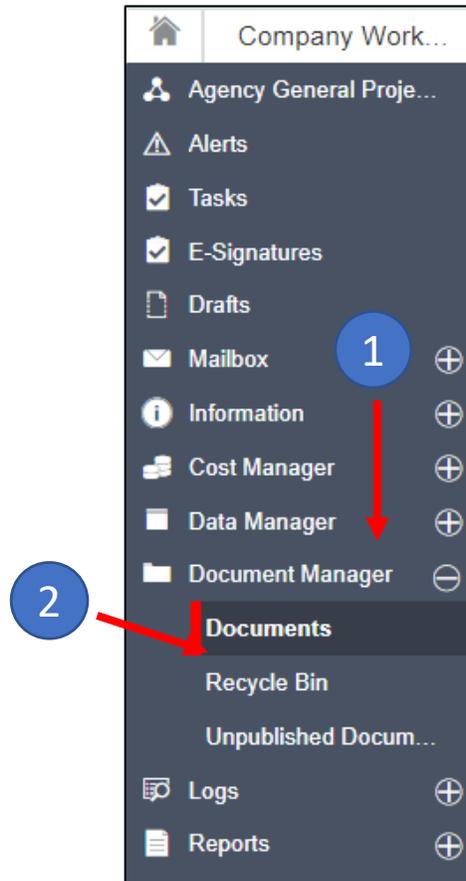
** If you are a School District Project user, you may or may not utilize Document Manager. Please follow up with your Project Manager for guidance.*

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



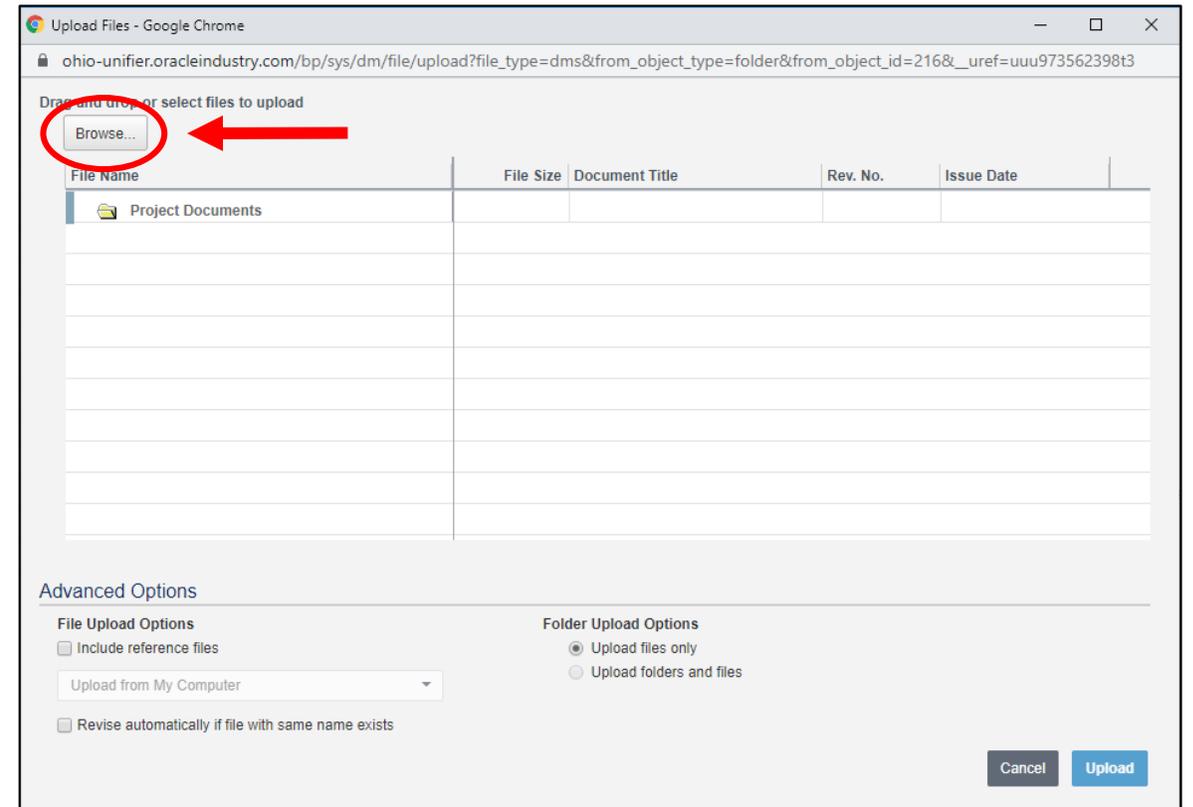
Document Upload

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



File Upload Window

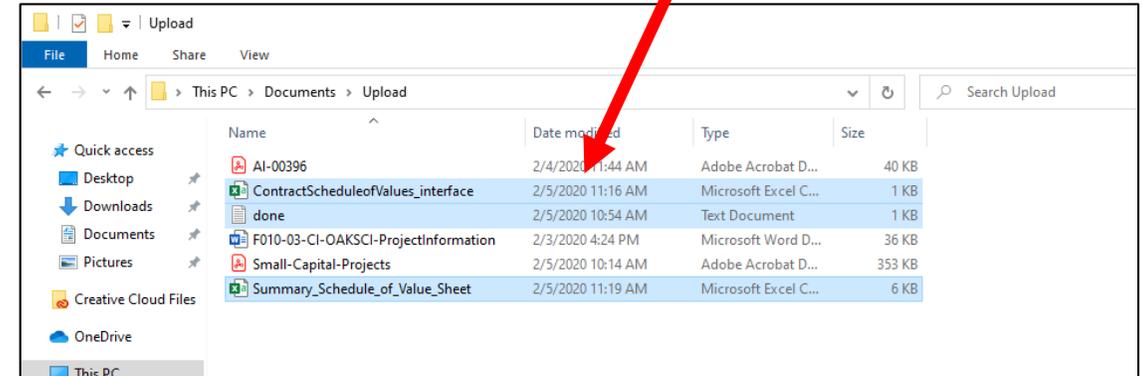
- ▶ A new window will appear for you to add files
- ▶ Click **Browse** to choose files for upload



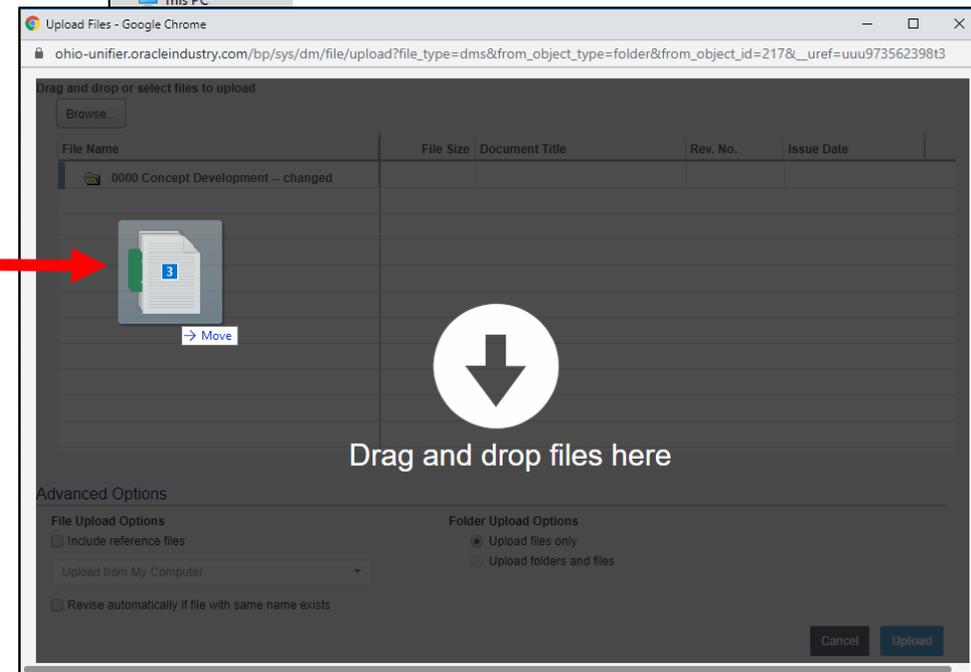
Drag and Drop files

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

Choose your folder of Documents or Select Multiple Documents

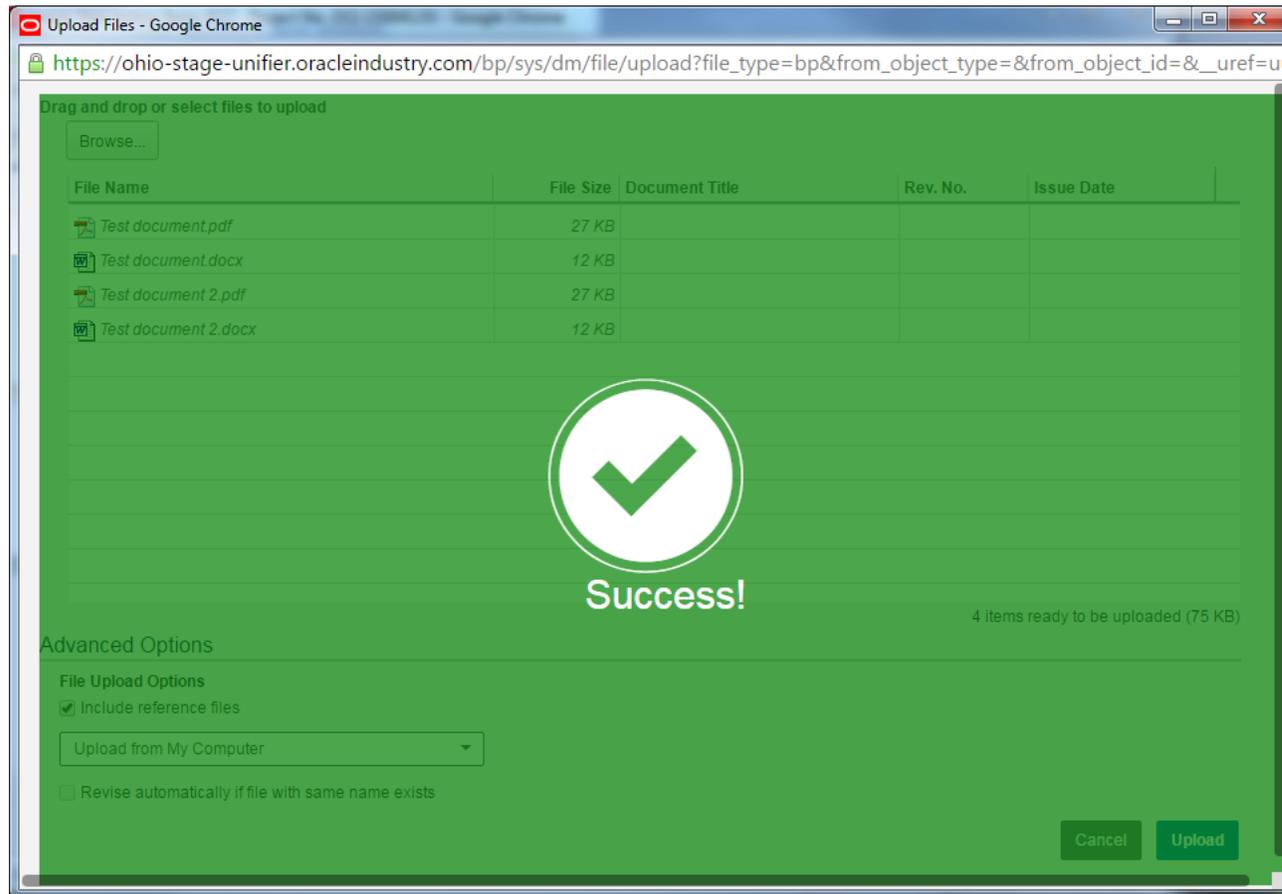


Drag and Drop the documents into the Upload Files window



Adding Documents

- ▶ If all 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 the breadcrumb path: Agency > OAKS CI Adminis... > Agency General... The main content area is titled "Documents" and shows a list of folders and files. A red box highlights a notification message that says: "Files or folders have been successfully uploaded to the currently open Document Manager. To see the changes, click Refresh". The notification is positioned over the "Refresh" button in the toolbar. The document list includes folders for various project phases (0000 Concept Development, 0100 Acquisition, 0200 Design, 0300 Construction, 0400 Post Construction, 0500 Extra Services, 0600 Budget) and individual files like Chrysanthemum.jpg, Clear Browsing Data.docx, Construction Phase DB Tr..., Desert.jpg, and Penguins.jpg.

Name	Issue Date								
0000 Concept Developme...									
0100 Acquisition									
0200 Design									
0300 Construction									
0400 Post Construction									
0500 Extra Services									
0600 Budget									
Chrysanthemum.jpg									
Clear Browsing Data.docx									
Construction Phase DB Tr...									
Desert.jpg									
Penguins.jpg									



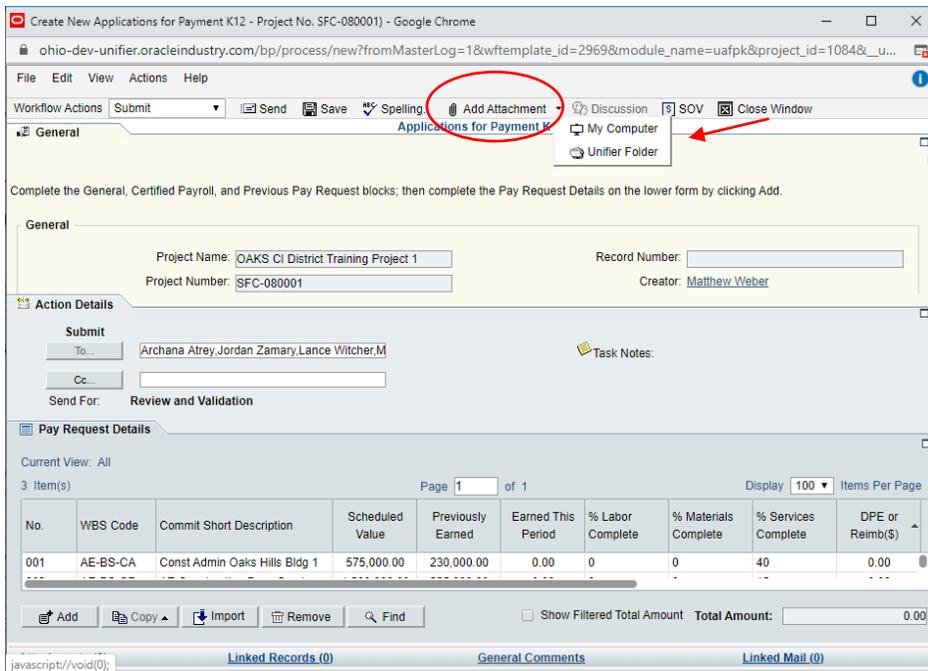
Attaching Documents to Records



Attach Documents to your Record

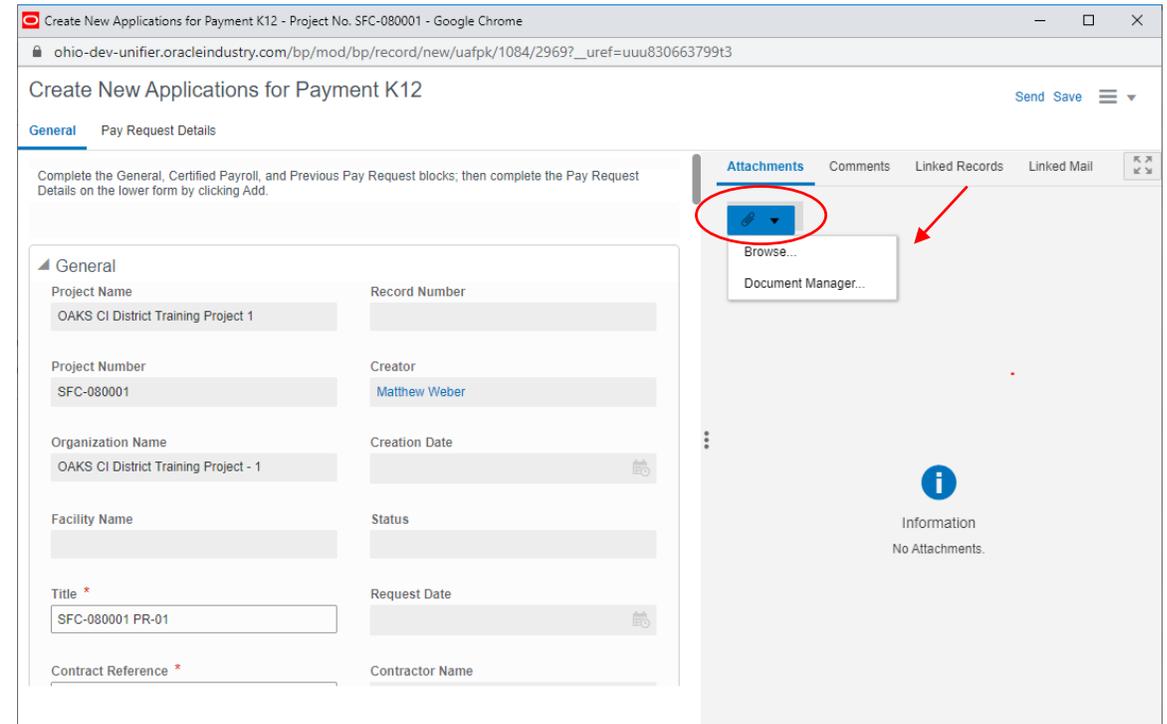
Old View:

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



New View:

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

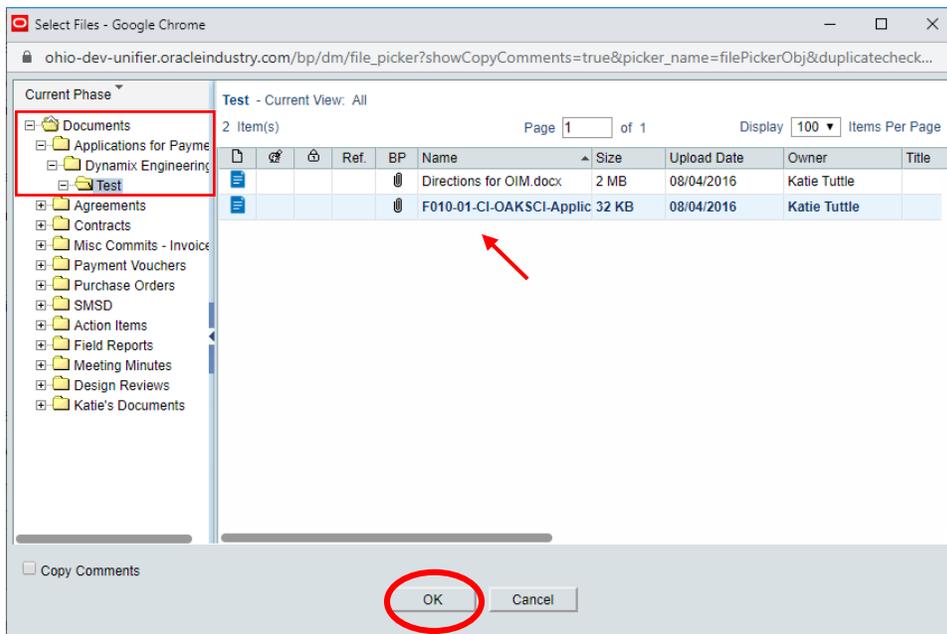


Attach Documents to your Record

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

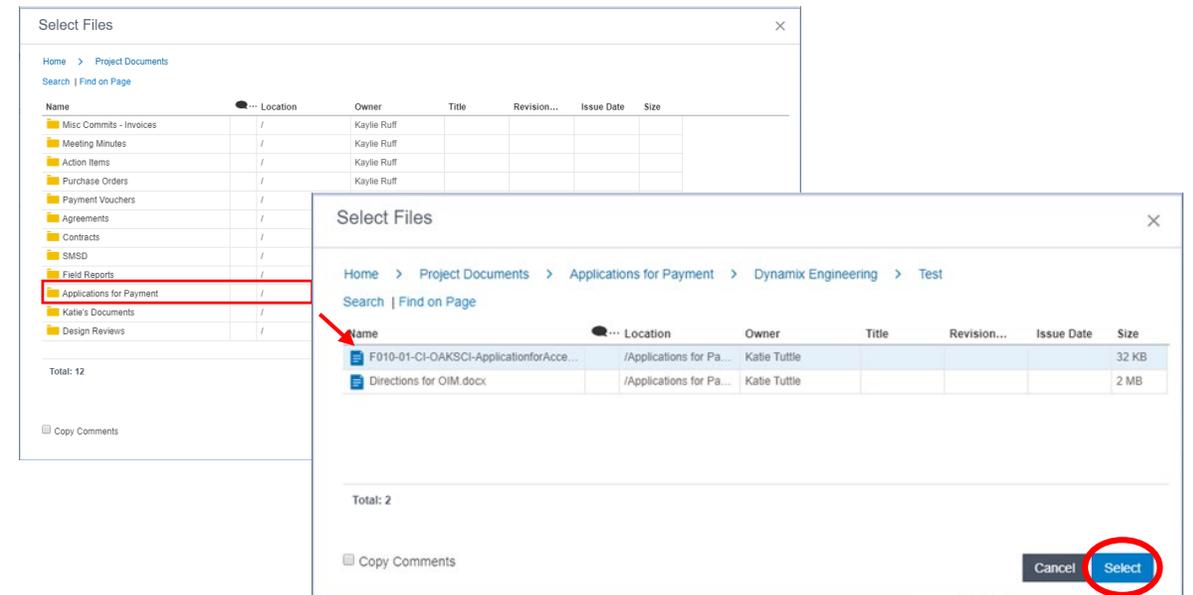
Old View:

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



New View:

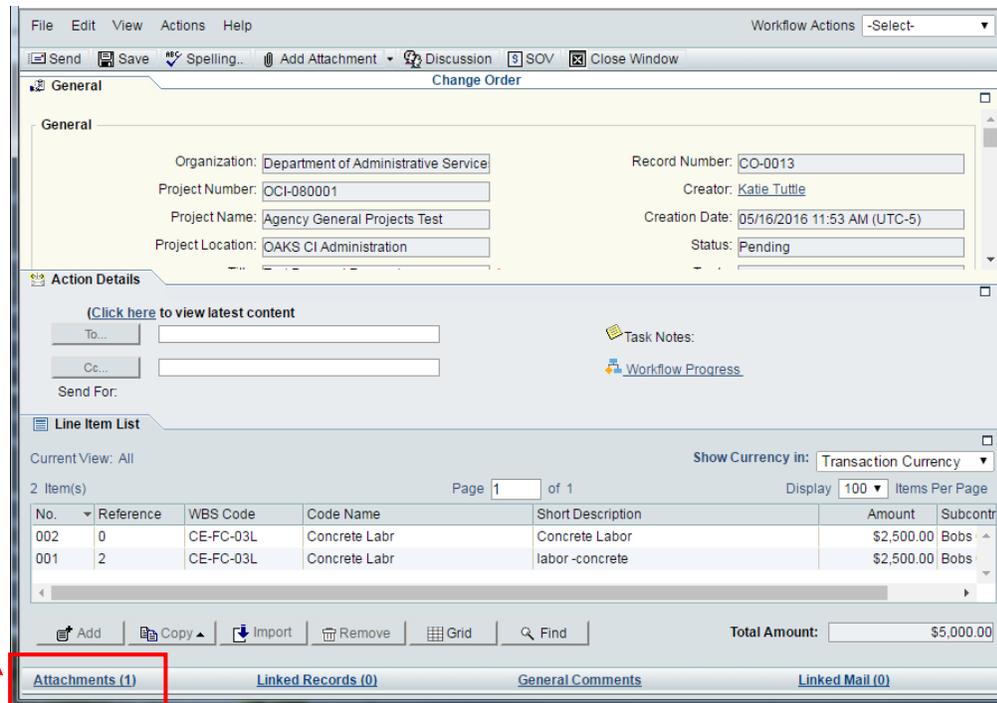
- ▶ Choose the folder (double click) where your documents are saved
- ▶ Select your document
- ▶ Click Select



View Attachments

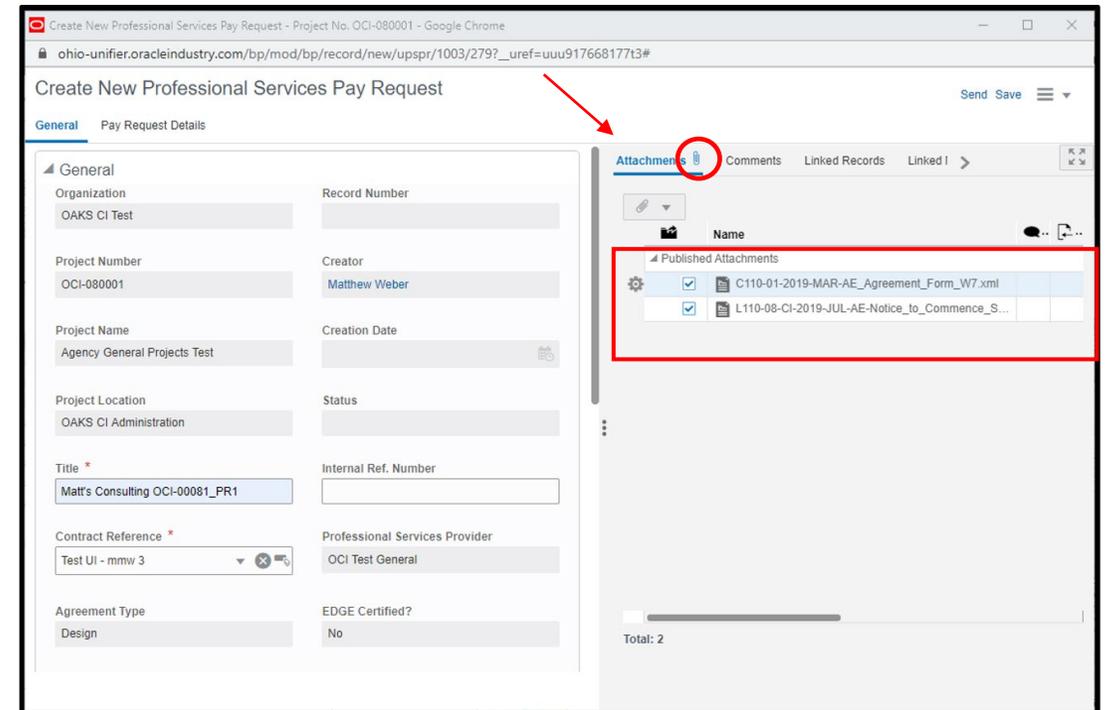
Old View:

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



New View:

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



Working in Logs



Logs

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

The screenshot displays the Oracle Primavera Unifier interface. On the left, a dark gray navigation menu is visible, with 'Logs' and 'Contractor Pay Request' highlighted by red boxes and arrows. The main area shows a 'Contractor Pay Request' record for 'testshauna' with a 'Record Number' of 'CPR-0029'. The record details are shown in a table format on the right.

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

Record Details:

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



Logs – View Record Details

To view a specific record:

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

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with the following items: Agency General Projects Test - Home, Alerts, Tasks, E-Signatures, Drafts, Mailbox, Information, Cost Manager, Data Manager, Document Manager, Logs, 72 Hour Notice, Action Items, Advertisements, Budget - Initial, Budget - Revisions, Change Order, Closeout - Contractor, Closeout - Professional Services, Contract, Contract Schedule of Values, Contractor Pay Request, and Design Reviews. The 'Logs' item is highlighted with a red box and a blue callout '1'. The 'Contractor Pay Request' item is highlighted with a red box and a blue callout '2'. The central table displays a list of records with columns: Title, Contract S..., Contractor Name, and Per. The record 'OCI-100056-01-01 PR2' is highlighted with a red box and a blue callout '3'. The right-hand details panel shows the record details for 'OCI-100056-01-01 PR2', including Organization (OAKS CI Test), Record Number (CPR-0028), Project Name (Agency General Projects), Creator (Matthew Weber), Project Number (OCI-080001), Creation Date (02/26/2020 09:20 AM), Project Location (OAKS CI Administration), Status (Approved), Title (OCI-100056-01-01 PR2), Request Date (02/26/2020 05:00 PM), Contract Reference (Katie's Contracting), Contractor Name (OCI Test General), and Final Payment? (No). The details panel is highlighted with a blue callout '4'.

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



Workflow Progress

- ▶ Click “Workflow Progress” in the preview screen to view the step-by-step information about this record

The screenshot shows the Oracle Primavera Unifier interface. The main view is titled "Contractor Pay Request" and displays a list of records with columns for Title, Contract S..., Contractor Name, and Percent ... The record "OCI-100056-01-01 PR2" is selected. On the right side, the "Record Details" tab is active, and the "Workflow Progress" sub-view is highlighted with a red box. A red arrow points to the "Workflow Progress" tab in the top navigation bar.

Workflow Progress Sub-view Data:

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



Create a New Record In Logs



Create a New Record

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

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

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



Add Information to the Record

Old View:

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

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

New View:

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

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



Add Information to the Record

Old View:

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

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

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

File Edit View Actions Help

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

General Contractor Pay Request

General

Organization: OAKS CI Test Record Number:

Project Name: Agency General Projects Test Creator: Matthew Weber

Project Number: OCI-080001 Creation Date:

Project Location: OAKS CI Administration Status:

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

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

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

Retainage Release Requested?: No

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

Internal Ref. Number: A/E Approval Date:

Prevailing Wage

Action Details

Pay Request Details Added Purchase Orders

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

New View:

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

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

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

Create New Contractor Pay Request

General Pay Request Details Added Purchase Orders

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

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

Final Payment? * No EDGE Certified Prime? No

Retainage Release Requested? Select

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

Internal Ref. Number: A/E Approval Date:

Prevailing Wage

Prevailing Wage Report

Type a Contractor Name...

Attachments Comments Linked Records Linked Mail

Published Attachments

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

Total: 3

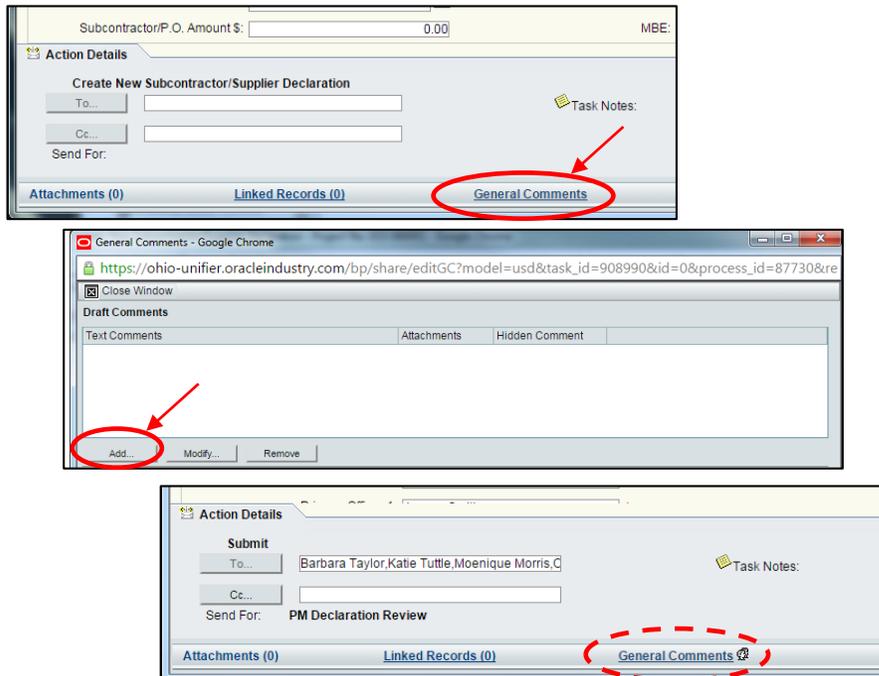


Add General Comments

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

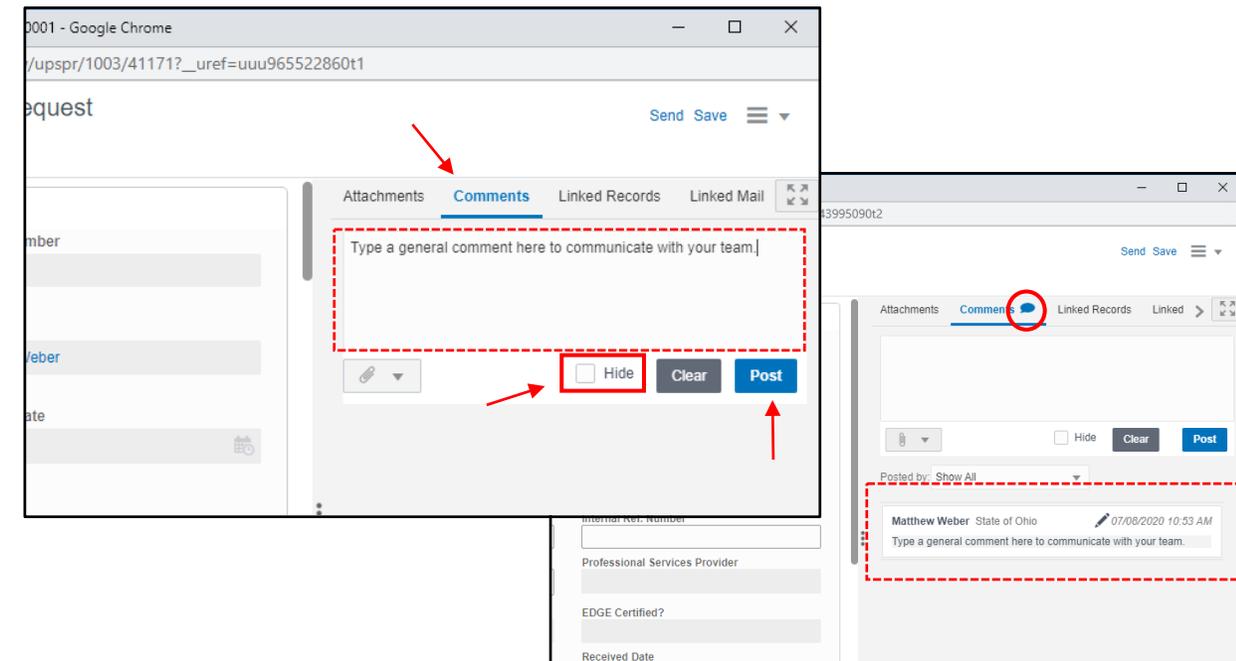
Old View:

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



New View:

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



Send the Record

Old View:

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

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

New View:

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

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



Questions?

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