



# Local Admin Training Construction Phase



# OAKS CI Training and Support

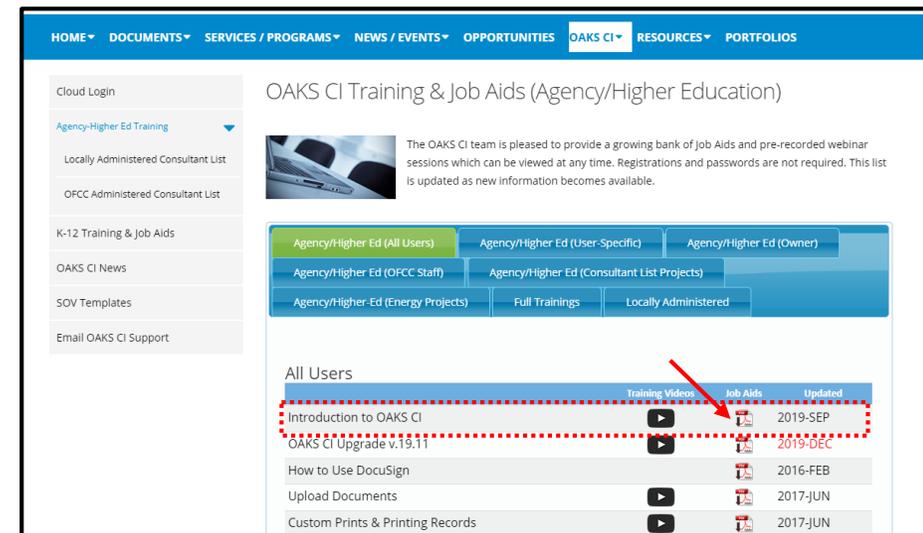
To view additional job aids and training materials for OAKS CI:

1. Navigate to [ofcc.ohio.gov](http://ofcc.ohio.gov)
2. Mouse over the OAKS CI tab
3. Click Agency/Higher Ed Training



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](mailto: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 PM Review step of the Contracts section. 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

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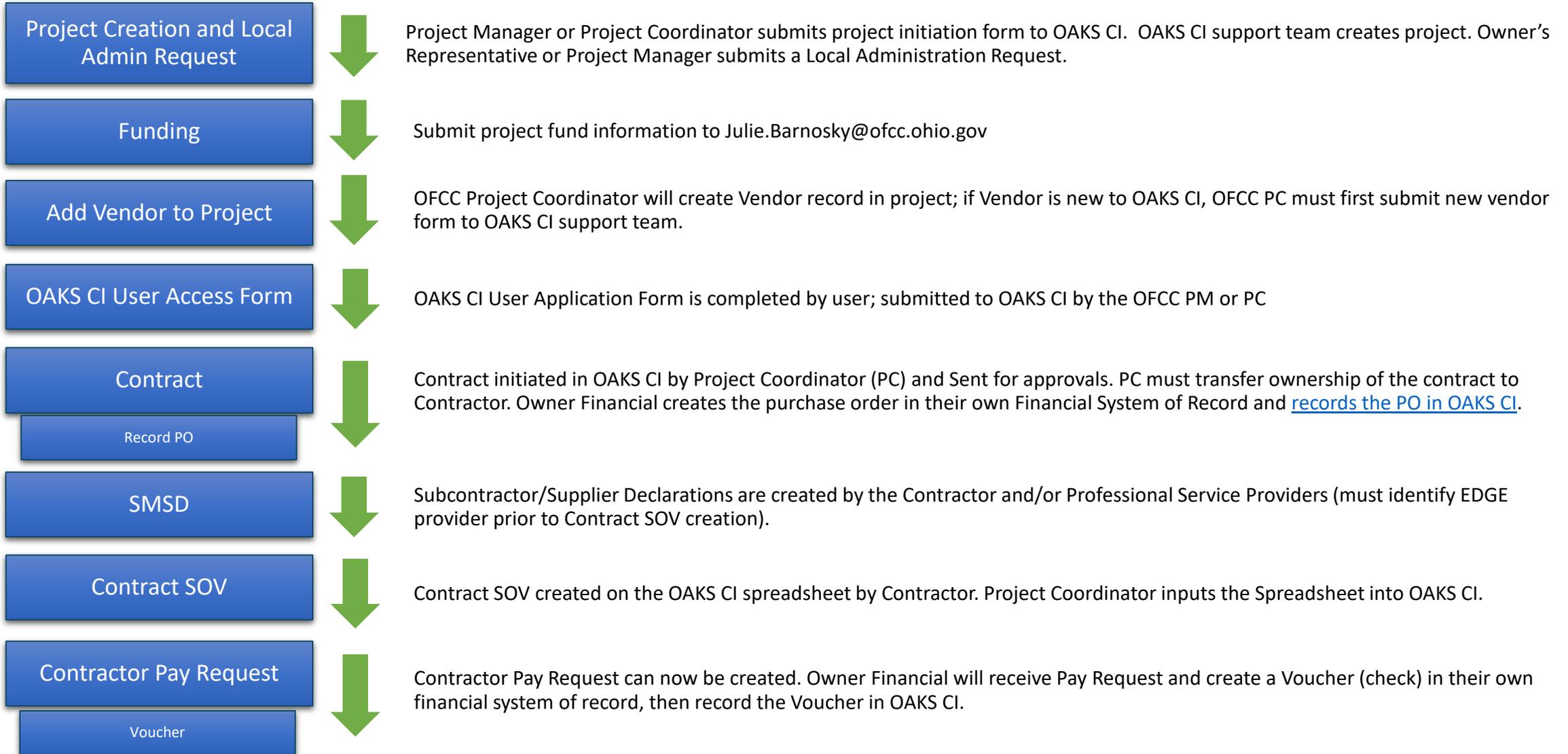
[Questions/Contact](#)

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# Local Admin Construction - OAKS CI Local Admin Project Process

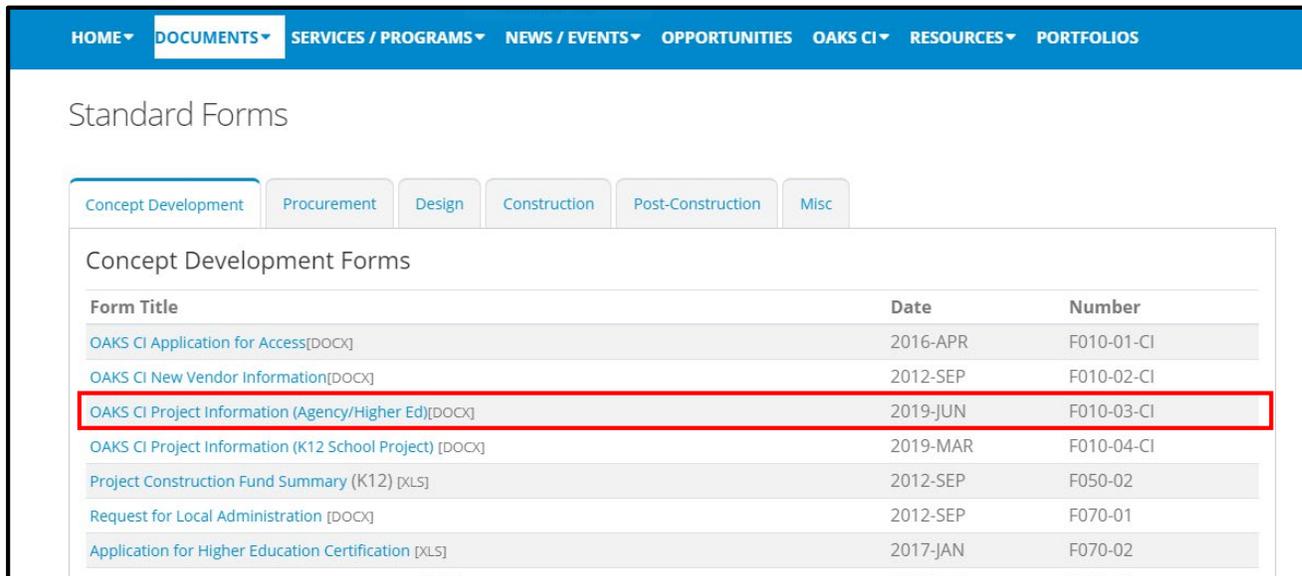
Click the blue buttons below to navigate directly to any section



# Project Creation

# Project Request

- ▶ 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](mailto:oaksci@ofcc.ohio.gov)
- ▶ The form can be located at [ofcc.ohio.gov](http://ofcc.ohio.gov) under:
  - ▶ Documents tab → Standard Forms
  - ▶ Concept Development → [OAKS CI Project Information \(Agency/Higher Ed\)](#)



Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Concept Development Forms

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



# Create a Local Admin Request



# Create a Local Admin Request

## Purpose

Local Administration is a state recognized process where certain state agencies and non-certified universities with the approval of OFCC may self administer the design and construction of new buildings and alterations or improvements to their existing facilities. The Local Administration Authorization Request (LAAR) process enables certain state agencies or universities to apply for approval to locally administer the design and construction of their projects. Refer to the OFCC Manual for further information regarding the Local Administration Request process.

The Local Administration Authorization Request business process provides for the submission, review, and resolution of Local Administration Authorization Requests.



# Create a Local Admin Request

## Roles

### **Owner or Project Manager**

Initiates the request for local administration approval authority

### **Institutional Designee**

Reviews and validates that the request is appropriately submitted

### **OFCC Fiscal Officer**

Reviews the financial information and recommends approval or rejection

### **OFCC Project Manager Supervisor**

Reviews the project management information and recommends approval or returns for clarification

### **Team Support**

Prepares and distributes the approval or rejection letter

### **State Architect**

Approves or rejects the request for local administration approval authority signs a hard copy letter of approval or rejection



# Create a Local Admin Request

## Creation of Record:

The agency owner's rep or PM initiates the Local Administration Authorization Request (LAAR) by preparing the required documentation for the Institutional Designee to submit to OFCC Office. The LAAR must include specific information about the proposed project, funding information and a properly completed Local Administration Authorization Request, OFCC form F070-01, available on the OFCC website. In this step, these items are uploaded to the project [Document Manager](#) and attached to a new LAAR record which is then submitted. Refer to the OFCC Manual for further information regarding the Local Administration Authorization Request requirements.

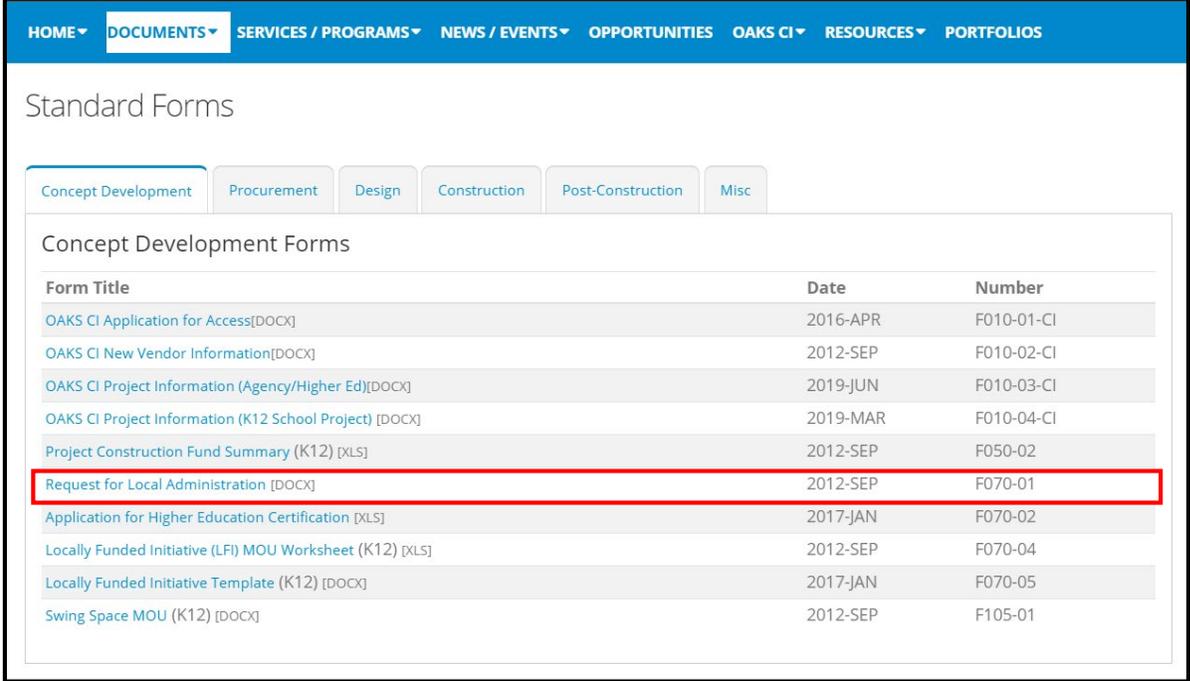


# Create a Local Admin Request

## Creation of Record:

A. Complete [OFCC Form F070-01](#) and all required attachments. These may be submitted in one or more attachments.

- ▶ The form can be located at [ofcc.ohio.gov](http://ofcc.ohio.gov):
  - ▶ Documents tab → Standard Forms
  - ▶ Concept Development → [Request for Local Administration \[DOCX\]](#)



Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Concept Development Forms

Form Title	Date	Number
<a href="#">OAKS CI Application for Access[DOCX]</a>	2016-APR	F010-01-CI
<a href="#">OAKS CI New Vendor Information[DOCX]</a>	2012-SEP	F010-02-CI
<a href="#">OAKS CI Project Information (Agency/Higher Ed)[DOCX]</a>	2019-JUN	F010-03-CI
<a href="#">OAKS CI Project Information (K12 School Project) [DOCX]</a>	2019-MAR	F010-04-CI
<a href="#">Project Construction Fund Summary (K12) [XLS]</a>	2012-SEP	F050-02
<a href="#">Request for Local Administration [DOCX]</a>	2012-SEP	F070-01
<a href="#">Application for Higher Education Certification [XLS]</a>	2017-JAN	F070-02
<a href="#">Locally Funded Initiative (LFI) MOU Worksheet (K12) [XLS]</a>	2012-SEP	F070-04
<a href="#">Locally Funded Initiative Template (K12) [DOCX]</a>	2017-JAN	F070-05
<a href="#">Swing Space MOU (K12) [DOCX]</a>	2012-SEP	F105-01



# Create a Local Admin Request

## Creation of Record:

B. Log into OAKS CI and open the appropriate project:

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

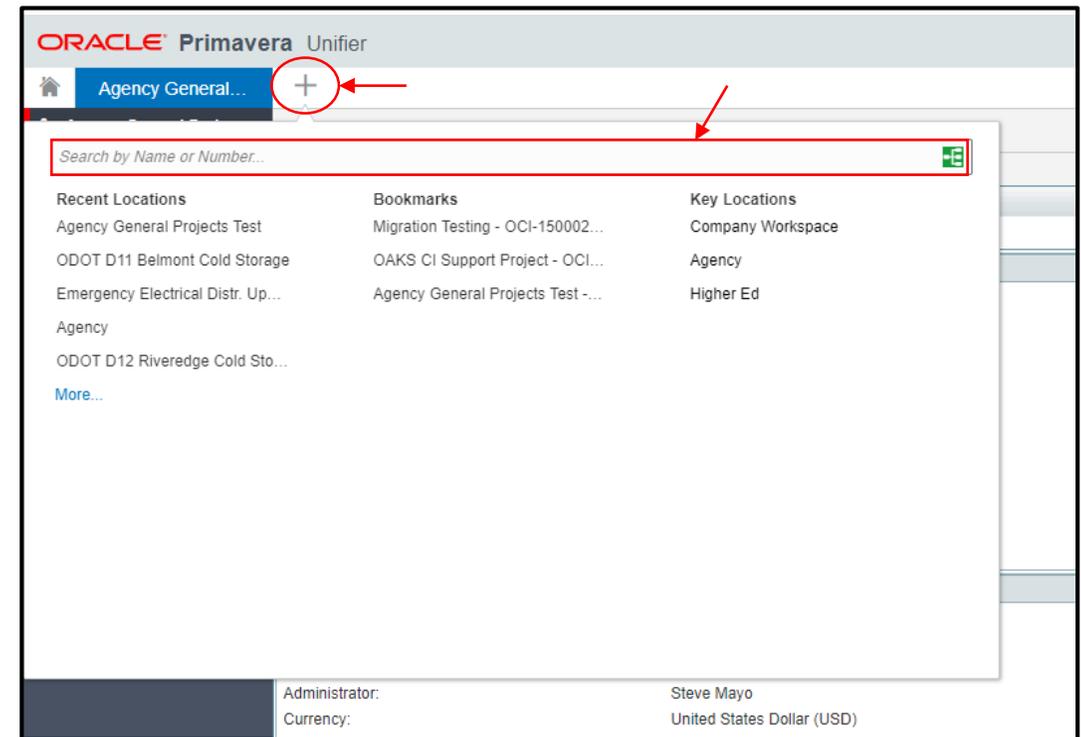


# Create a Local Admin Request

## Creation of Record:

B. Log into OAKS CI and open the appropriate 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

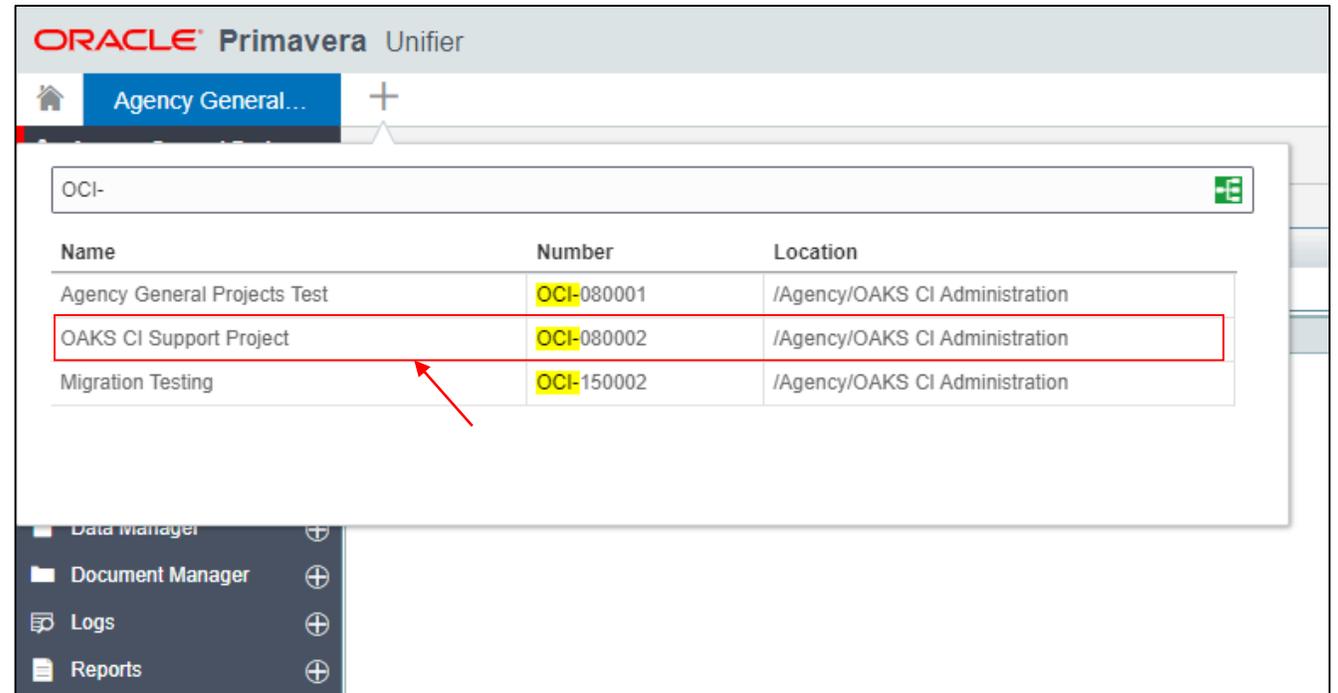


# Create a Local Admin Request

## Creation of Record:

B. Log into OAKS CI and open the appropriate 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 bar contains the text 'OCI-'. Below the search bar, 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	OCI-080001	/Agency/OAKS CI Administration
OAKS CI Support Project	OCI-080002	/Agency/OAKS CI Administration
Migration Testing	OCI-150002	/Agency/OAKS CI Administration

A red box highlights the 'OAKS CI Support Project' row, and a red arrow points to it. Below the search results, there is a sidebar with icons and labels for 'Data Manager', 'Document Manager', 'Logs', and 'Reports', each with a plus sign next to it.

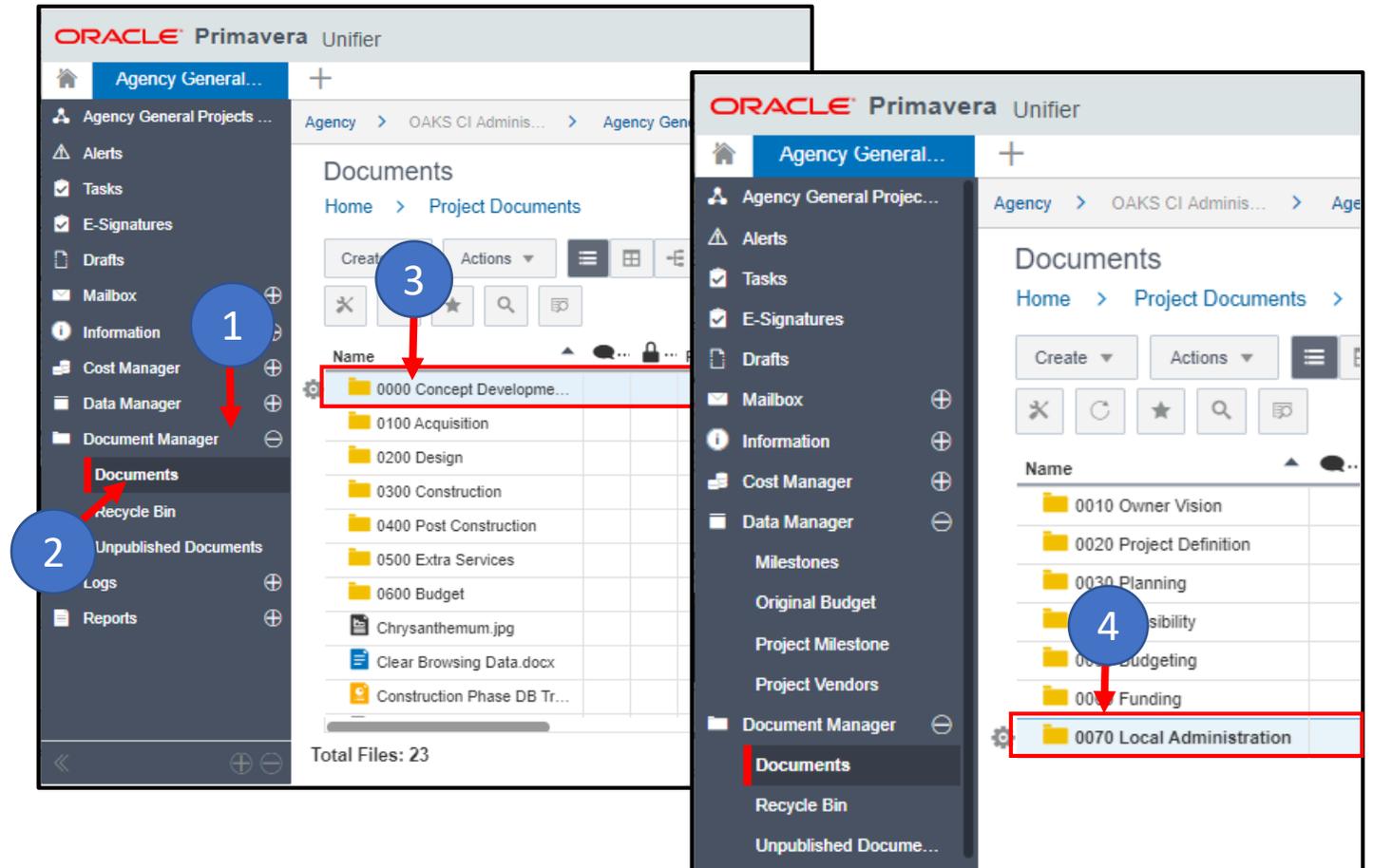


# Create a Local Admin Request

## Creation of Record:

C. Upload Form F070-01 and all attachments to the Document Manager:

- 1) Navigate to **Document Manager**
- 2) Click on Documents
- 3) Double-click the **0000 Concept Development** Folder
- 4) Double-click the **0070 Local Administration** Folder



# Create a Local Admin Request

## Creation of Record:

C. Upload Form F070-01 and all attachments to the Document Manager:

- 5) Click the **Upload Arrow** button
  - ▶ A new window will appear for you to add files
- 6) Click **Browse** to choose files for upload

The screenshot displays the Oracle Primavera Unifier interface. The left sidebar shows the navigation menu with 'Documents' selected. The main content area shows the 'Documents' page with a list of files. A red circle labeled '5' highlights the 'Upload Arrow' button in the top right corner of the document list. Below this, a dialog box titled 'Upload Files - Google Chrome' is open. A red circle labeled '6' highlights the 'Browse...' button in the dialog box. The dialog box contains a table with columns for File Name, File Size, Document Title, Rev. No., and Issue Date. The table has one row with the file name '0070 Local Administration'. Below the table, there are 'Advanced Options' including 'File Upload Options' and 'Folder Upload Options'. The 'File Upload Options' section has 'Include reference files' checked and 'Upload from My Computer' selected. The 'Folder Upload Options' section has 'Upload files only' selected. There are 'Cancel' and 'Upload' buttons at the bottom right of the dialog box.



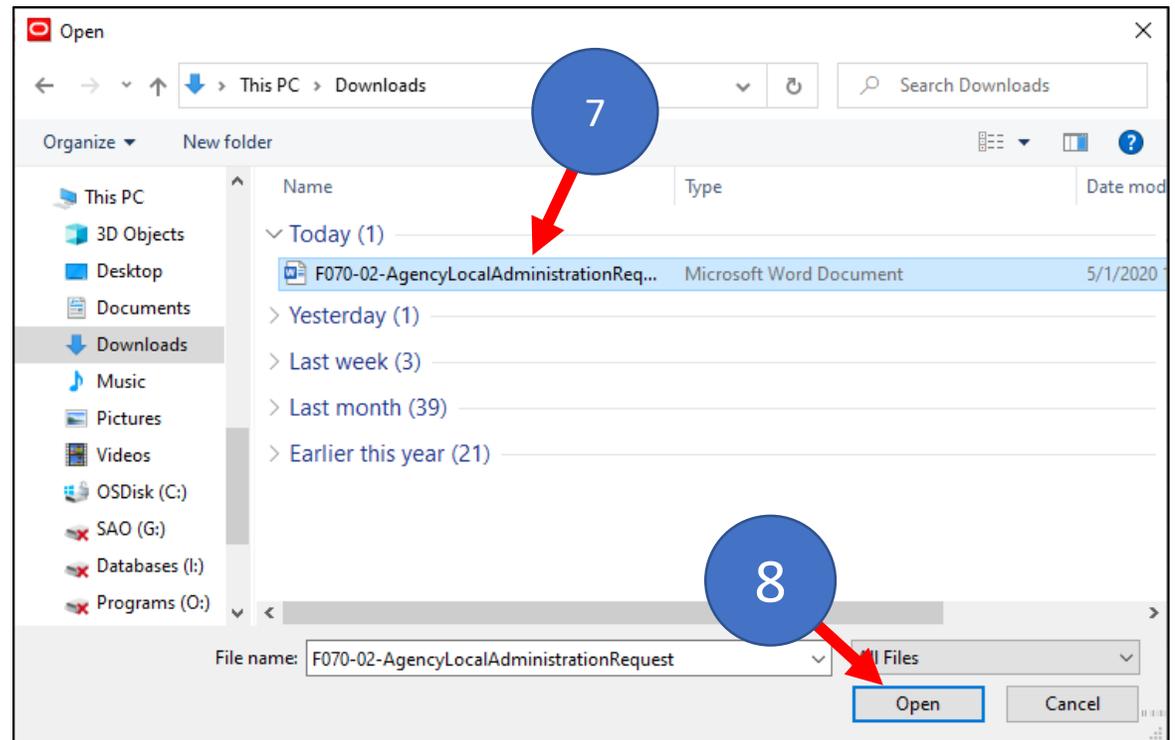
# Create a Local Admin Request

## Creation of Record:

C. Upload Form F070-01 and all attachments to the Document Manager:

7) Locate the document(s) you want to upload from your computer and select them

8) Click **Open**

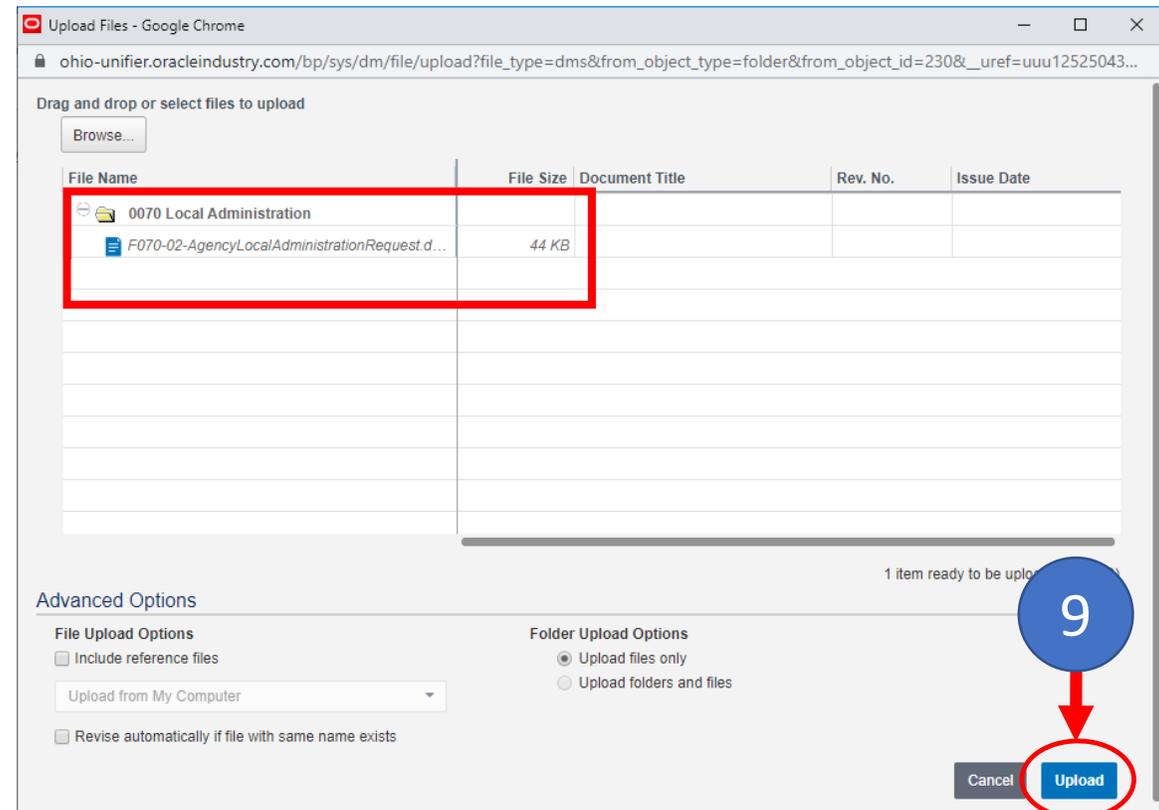


# Create a Local Admin Request

## Creation of Record:

C. Upload Form F070-01 and all attachments to the Document Manager:

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

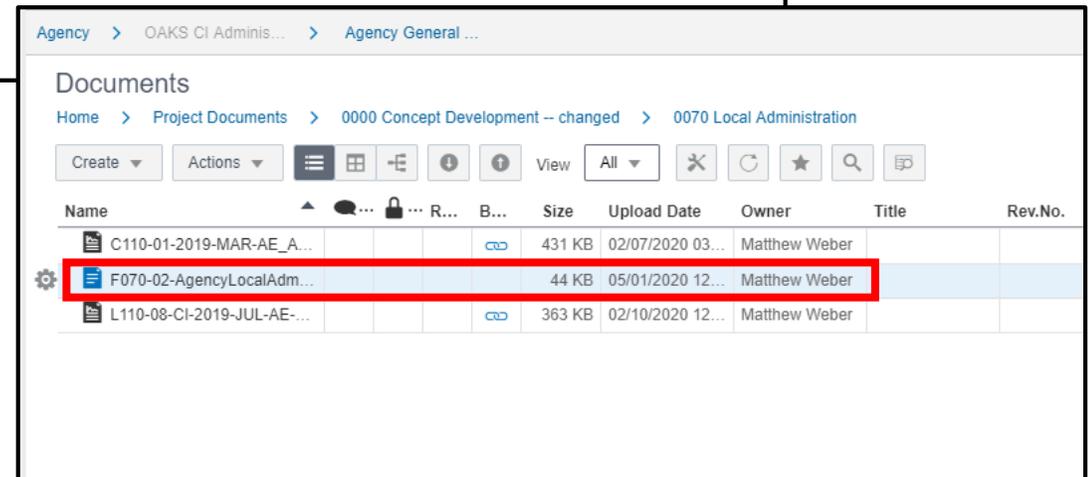
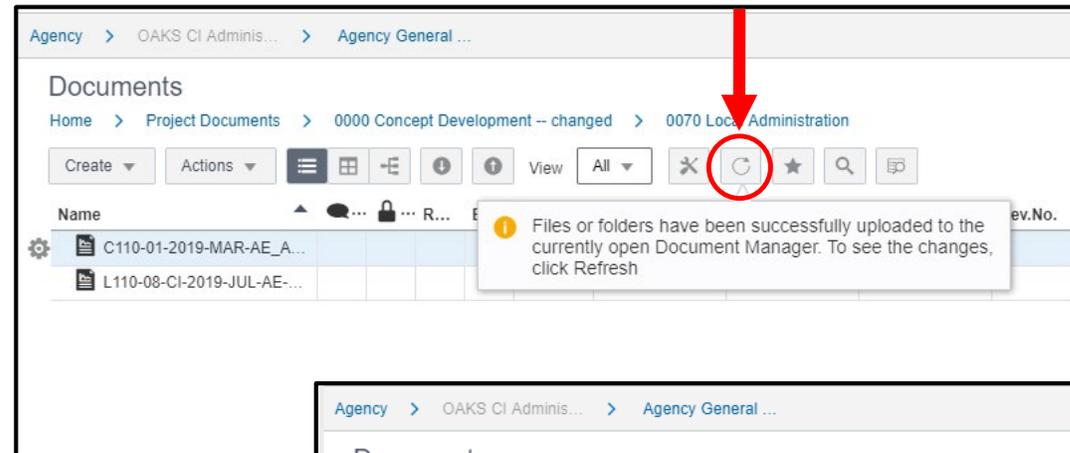


# Create a Local Admin Request

## Creation of Record:

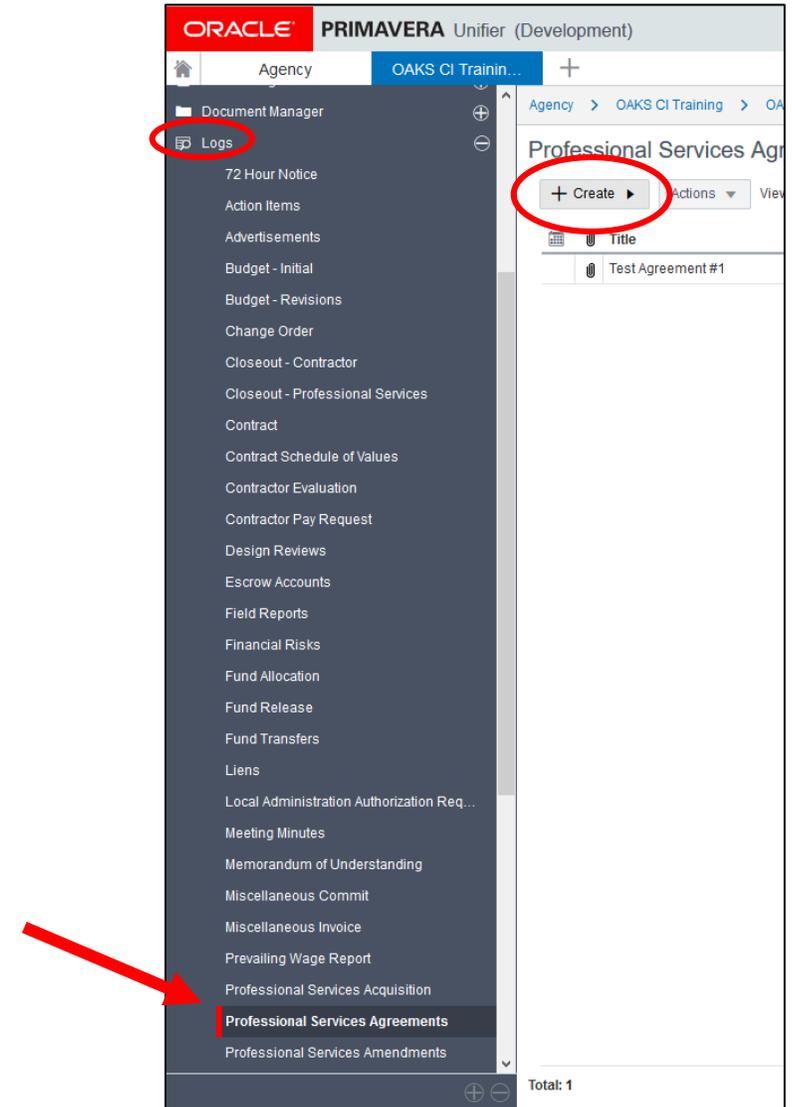
C. Upload Form F070-01 and all attachments to the Document Manager:

- ▶ After a few moments you will see a message appear indicating your document(s) have been successfully uploaded
- ▶ Click Refresh to see the newly uploaded document(s)



# Create a Local Admin Request

- ▶ Click **Logs** -> **Local Administration Authorization Requests**
- ▶ Click **Create**



# Create a Local Admin Request

- a) Complete the appropriate fields. Required fields are indicated with a red asterisk (\*). Fields that are gray are automatically populated by the business process setup or are available in a subsequent step.

Browser: Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome  
URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/ulaar/1003/248804?\_\_uref=uuu125250432t1

### Create New Local Administration Authorization Requests

Send Save

#### General

Complete the Local Administration Request for only construction projects with a total budget greater than \$200,000.

<b>Organization</b> OAKS CI Test	<b>Record Number</b> [Grayed out]
<b>Project Number</b> OCI-080001	<b>Creator</b> Matthew Weber
<b>Project Name</b> Agency General Projects Test	<b>Creation Date</b> [Calendar icon]
<b>Project Location</b> OAKS CI Administration	<b>Status</b> [Grayed out]

#### Facility Information

<b>Gross Sq. Ft.</b> 0	<b>No. of Stories</b> 5
<b>Project Type</b> Renovation	

#### Attachments

Comments

Information  
No Attachments.



# Create a Local Admin Request

b) In the Dates Block, provide estimated dates for the following:

- ▶ Enter the Anticipated Ohio Register Date (MM/YY)
- ▶ Estimated Construction Duration (# of months)
- ▶ Estimated Construction Completion Date (MM/YY)

The screenshot shows a web browser window titled "Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/ulaar/1003/248804?\_uref=uuu125250432t1". The page title is "Create New Local Administration Authorization Requests". There are "Send" and "Save" buttons and a menu icon. The "General" tab is selected. The "Dates" section is highlighted with a red arrow and contains three input fields: "Anticipated Ohio Register Date (MM/YY)" with the value "06/20", "Est. Construction Duration (# of months)" with the value "6", and "Est. Construction Completion Date (MM/YY)" with the value "12/20". The "Funding" section is partially visible below.



# Create a Local Admin Request

- c) In the Funding Block, enter the following information:
- ▶ **Appropriation Line Item** – enter the House or Senate Bill No.
  - ▶ **Local Funds (\$)** - Enter the amount, if none, enter zero (0.00).
  - ▶ **State Funds (\$)** - Enter the amount, if none, enter zero (0.00).
  - ▶ **Other Funds (\$)** - Enter the amount, if none, enter zero (0.00).
  - ▶ **Total Budget (\$)** auto-populates based on the entries above.
  - ▶ **Other Description** – enter the source or description of Other Funds

Est. Construction Completion Date (MM/YY)  
12/20

**Funding**

Appropriation Line Item \*  
H. B. No. 48

Local Funds (\$) \* 100,000.00      State Funds (\$) \* 100,000.00

Other Funds (\$) \* 0.00      Total Budget (\$) 200,000.00

Other Description

Attachments    Comments    Linked

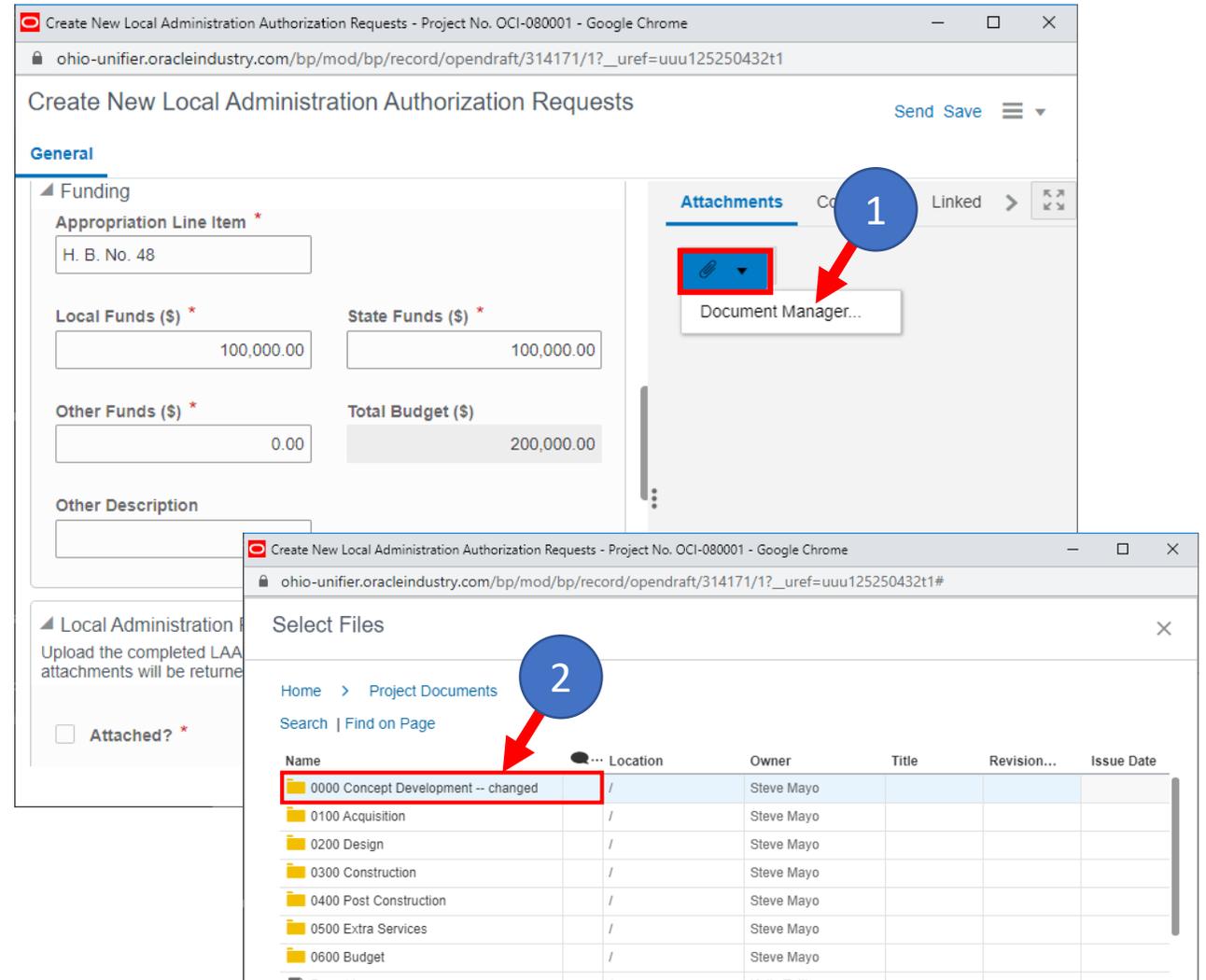
Information  
No Attachments.



# Create a Local Admin Request

d) Attach the OFCC Form F070-01 previously uploaded to the Document Manager to this LAAR record.

1. Click **Attachment -> Document Manager** to display the document manager directory structure.
2. Double-click the **0000 Concept Development Folder**



# Create a Local Admin Request

d) Attach the OFCC Form F070-01 previously uploaded to the Document Manager to this LAAR record.

3. Double-click the **0070 Local Administration** Folder
4. Highlight Form F070-01 uploaded in previous steps
5. Click **Select**

The image displays two screenshots of a web application interface for creating a Local Administration Request (LAAR). The browser window title is "Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome".

The first screenshot shows the "Select Files" dialog. The breadcrumb path is "Home > Project Documents > 0000 Concept Development -- changed". A table lists folders under the "Name" column:

Name
0010 Owner Vision
0020 Project Definition
0030 Planning
0040 Feasibility
0050 Budgeting
0060 Funding
<b>0070 Local Administration</b>

A red box highlights the "0070 Local Administration" folder, and a blue circle with the number "3" and a red arrow points to it.

The second screenshot shows the "Select Files" dialog with the breadcrumb path "Home > Project Documents > 0000 Concept Development -- changed > 0070 Local Administration". A table lists files under the "Name" column:

Name	Location	Owner	Title	Revision...	Issue Date
C110-01-2019-MAR-AE_Agreement_Fo...	/0000 Concept Dev...	Matthew Weber			
L110-08-CI-2019-JUL-AE-Notice_to_Co...	/0000 Concept Dev...	Matthew Weber			
<b>F070-02-AgencyLocalAdministration...</b>	/0000 Concept Dev...	Matthew Weber			

A red box highlights the "F070-02-AgencyLocalAdministration..." file, and a blue circle with the number "4" and a red arrow points to it.

At the bottom right of the second screenshot, there are "Cancel" and "Select" buttons. A blue circle with the number "5" and a red arrow points to the "Select" button.

# Create a Local Admin Request

- e) In the Local Administration Request Form block, click in the check box to confirm attachment of the Local Administration Authorization Request form, OFCC form # F070-01

Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/314171/1?\_\_uref=uuu125250432t1#

## Create New Local Administration Authorization Requests

Send Save

### General

#### Funding

Appropriation Line Item \*  
H. B. No. 48

Local Funds (\$) \* 100,000.00      State Funds (\$) \* 100,000.00

Other Funds (\$) \* 0.00      Total Budget (\$) 200,000.00

Other Description

#### Local Administration Request Form

Upload the completed LAAR form and attach it to this record. Records with no attachments will be returned.

Attached? \*

#### Attachments

Comments    Linked    >

Published Attachments

Name
F070-02-AgencyLocalAd...

Total: 1



# Create a Local Admin Request

- f) Check the data pre-populated into the Institutional Designee block and make corrections if needed

Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/314171/1?\_uref=uuu125250432t1#

## Create New Local Administration Authorization Requests

Send Save

### General

**Institutional Designee**

Institutional Designee  
ODJFS

Address Line 1  
4200 Surface Rd

Address Line 2

City  
Columbus

State  
Ohio

ZIP  
43228

Owners Representative  
Omar Rodriguez

Owner's Financial  
Owen Fitzgerald

### Attachments

Comments Linked

Name

Published Attachments

<input checked="" type="checkbox"/>	F070-02-AgencyLocalA...
-------------------------------------	-------------------------

Total: 1



# Create a Local Admin Request

- g) Comments may be added to the record by clicking the Comments tab on the right side of the form. Comments become a permanent part of the record (view the [Adding Comments](#) section for further instruction).
- h) When all the entries are complete and the Local Administration Authorization Request form has been attached, click **Send**

Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/314171/1?\_\_uref=uuu125250432t1#

## Create New Local Administration Authorization Requests

Send Save

### General

**Institutional Designee**  
Institutional Designee  
ODJFS

**Address Line 1**  
4200 Surface Rd

**Address Line 2**

**City**  
Columbus

Attachments **Comments** Links

Hide Clear Post

Posted by: Show All

Matthew Weber State of Ohio 05/01/2020 12:29 AM  
Check for additional attachments



# Create a Local Admin Request

- ▶ Verify Workflow Action: Submit
- ▶ Click **Send**
- ▶ A message is displayed stating that the Local Administration Authorization Request record has been successfully submitted.

Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/314171/1?\_\_uref=uuu125250432t1#

Create New Local Administration Authorization Requests

General

Complete the Local Administration Authorization Request with a total budget of \$1,000,000.

Organization: OAKS CI Test

Project Number: OCI-080001

Project Name: Agency General

Project Location: OAKS CI Address

Facility Information: Gross Sq. Ft.

Workflow Action Details

Action Details

Workflow Actions \*  
Submit

Send For  
Review and Validation

To  
Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Institutional Designee

CC  
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send



# Funds

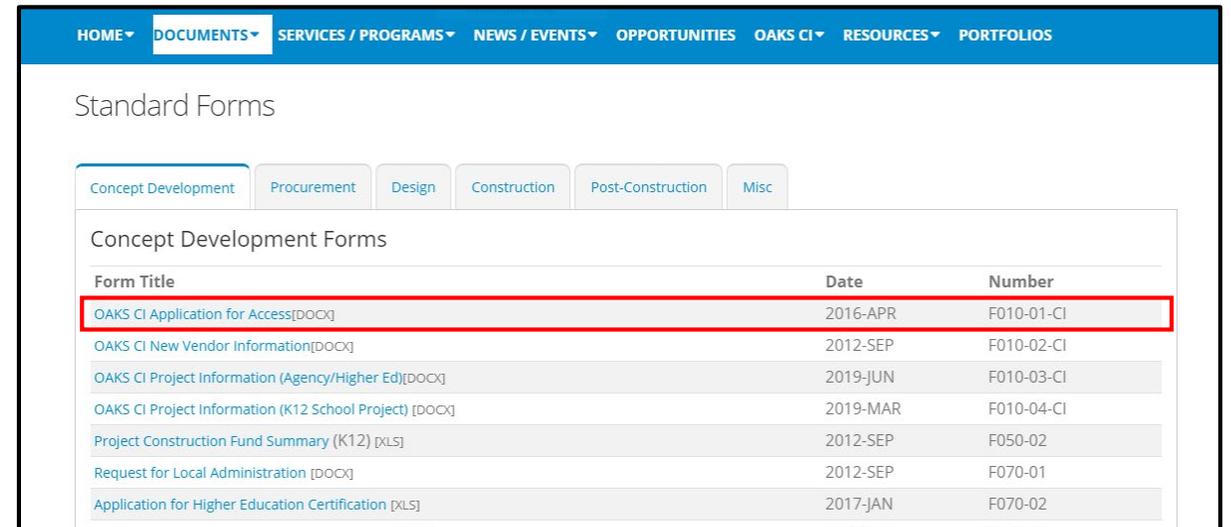
Submit project fund information to [Julie.Barnosky@ofcc.ohio.gov](mailto:Julie.Barnosky@ofcc.ohio.gov)

# 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](mailto:oaksci@ofcc.ohio.gov) after approval by the Project Coordinator or Project Manager.

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



Standard Forms

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



# 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 Agreement.



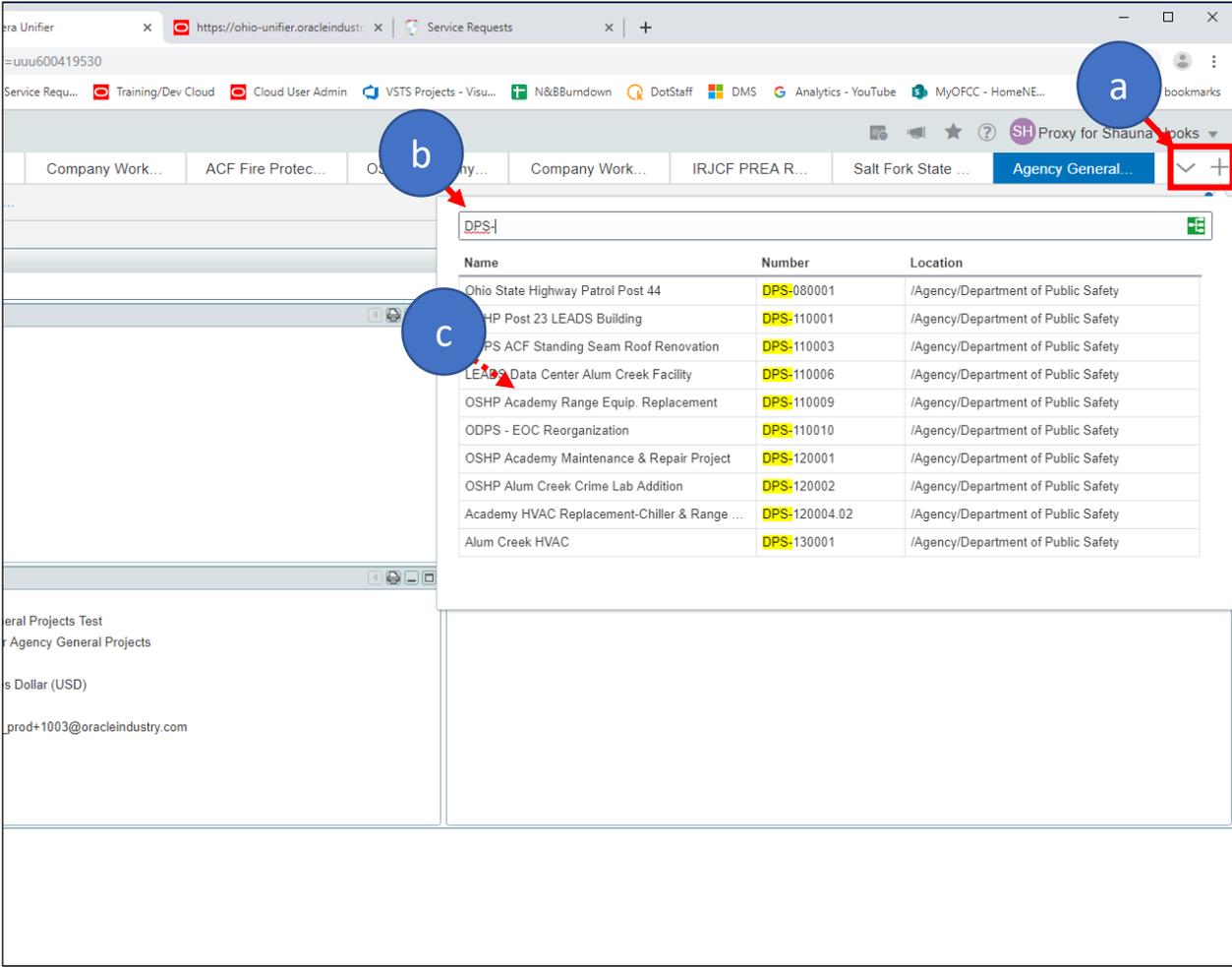
# Create Vendor Record (PC)

- ▶ Log into OAKS CI

  - a. Click + sign

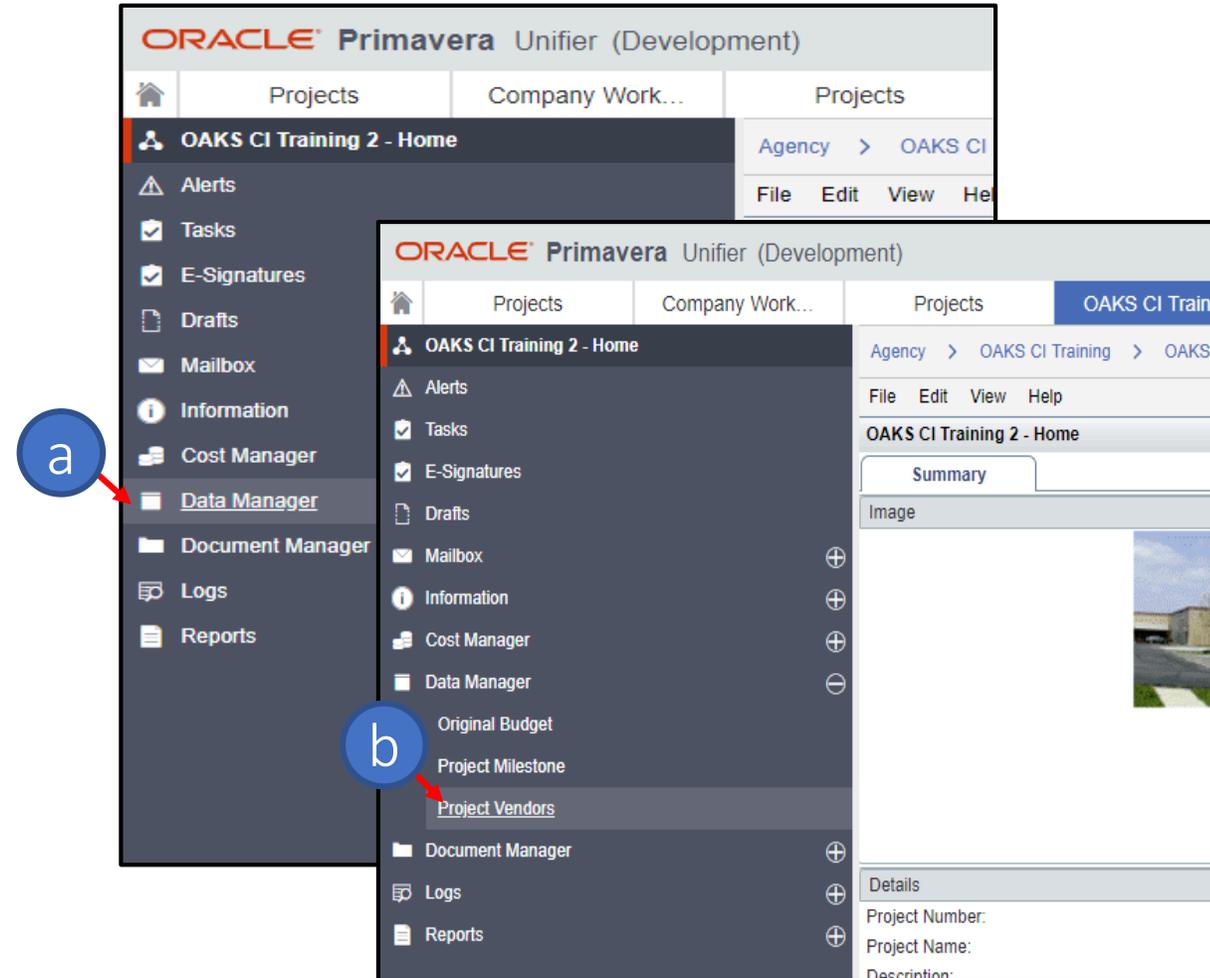
  - b. Type project name or number in search bar

  - c. Click appropriate project to open



# Create Vendor Record (PC)

- ▶ Once in your project:
  - Click Data Manager
  - Click Project Vendors



# 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**

The screenshot displays the 'Project Vendors' interface. At the top, there is a navigation bar with 'Projects' and 'OAKS CI Traini...'. Below this, a breadcrumb trail shows 'Agency > OAKS CI Training > OAKS CI Training 2'. The main heading is 'Project Vendors'. A blue circle labeled 'C' points to the '+ Create' button. Below the heading is a table of existing vendors:

OAKS Business Unit	Vendor Name	OAKS Vendo...	Local Vendor...	City	Status
KSU01	Archie's Architectural Inc.	0000001725	0000012345	Dublin	Active
DAS01	ENC	nnnnnnnn		Shaunatown	Active
DOT01	OAKS Plumbing			Columbus	Active

Below the table, a blue circle labeled 'd' points to the 'Address' tab in the 'Create New Project Vendors' form. The form fields include:

- Organization: Miami University
- OAKS Business Unit: MUN01
- Project Number: OCI-080001
- Project Name: OAKS CI Training 1
- Project Location: Surface Road
- Vendor: OAKS Plumbing
- Vendor Name: OAKS Plumbing
- Record Number: (empty)
- Creator: Matthew Weber
- Creation Date: (empty)
- Status: Active
- President / CEO: John Tree

A blue circle labeled 'e' points to the 'Submit' button in the top right corner of the form. The right sidebar shows 'Attachments' with 'No Attachments'.



# Contracts



# Purpose & Procedure

- ▶ The purpose of the Contracts Business Process is to prepare and execute the contract agreement following the Bidding process. The completion of this business process will result in a fully executed paper Contract, issuance of a “Notice to Proceed” letter and entry of the Contract Schedule of Value.



# Validation Links

Use the following links to validate contractor information:

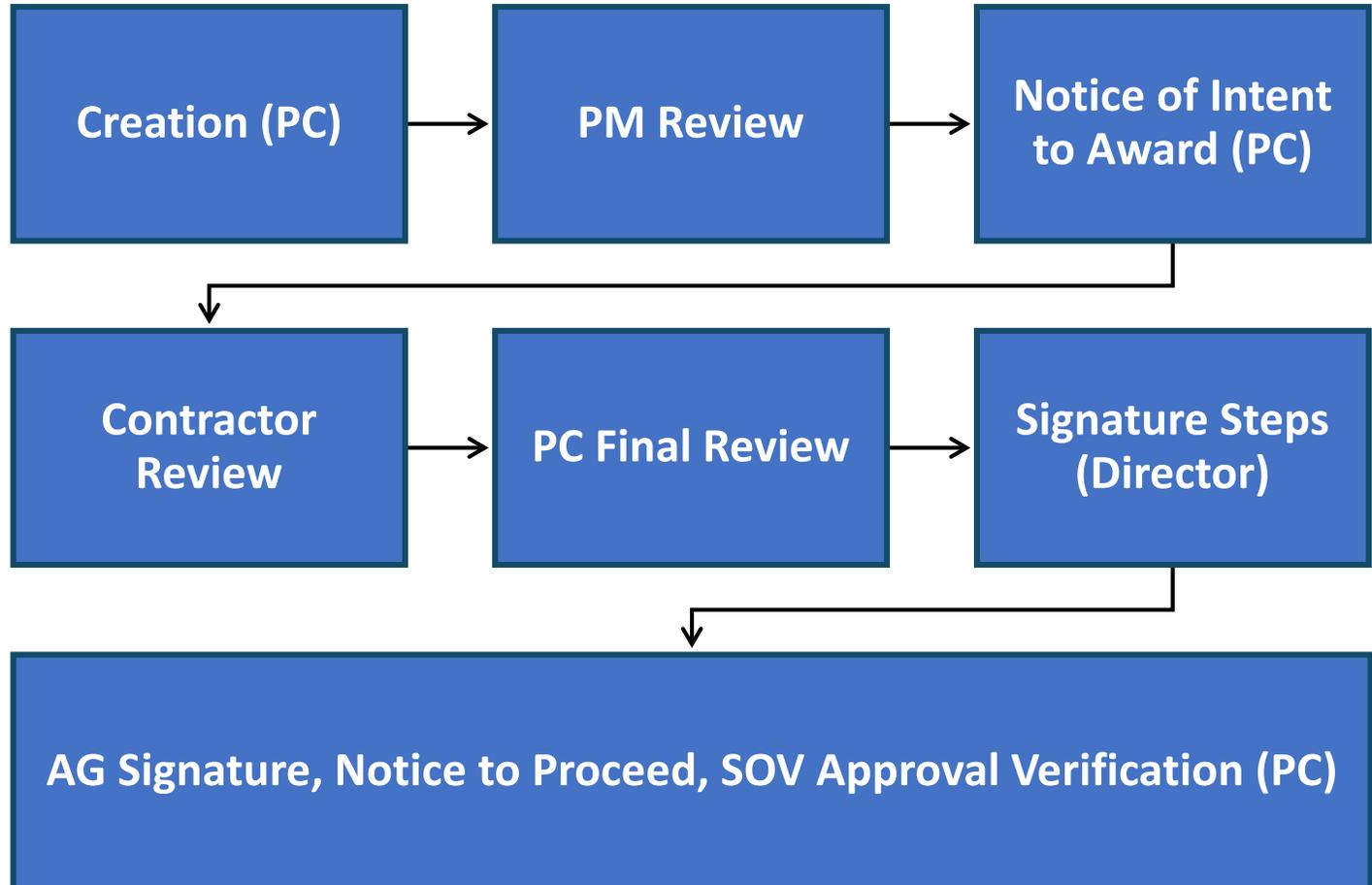
- Auditor Search for Recovery
  - <http://ffr.ohioauditor.gov/>
- Legal Name Search
  - <https://businesssearch.ohiosos.gov/>
- Drug Free Workplace
  - <https://www.bwc.ohio.gov/employer/services/StateContract/nlbwc/StateContract1.aspx>
- EDGE
  - <https://eodreporting.oit.ohio.gov/edge-certification>
- EOD
  - <https://eodreporting.oit.ohio.gov/>
- State of Ohio Debarred
  - <https://procure.ohio.gov/proc/debarment.asp>
- Fed Debarred
  - <https://www.dol.gov/ofccp/regs/compliance/preaward/debarlst.htm>



# Contracts

- ▶ Workflow Steps

*Click the boxes to navigate directly to each section*



# Contract Initiation (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 contains the user ID "uuuu600419530". The page header includes a navigation menu with items like "Company Work...", "ACF Fire Protec...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the header, labeled with a blue circle "a". Below the header is a search bar containing the text "DPS-". A red arrow points to the search bar, labeled with a blue circle "b". Below the search bar is a table with the following data:

Name	Number	Location
Ohio State Highway Patrol Post 44	DPS-080001	/Agency/Department of Public Safety
HP Post 23 LEADS Building	DPS-110001	/Agency/Department of Public Safety
DPS 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

A red arrow points to the first row of the table, labeled with a blue circle "c". The bottom of the page shows a sidebar with text: "eral Projects Test", "Agency General Projects", "s Dollar (USD)", and "prod+1003@oracleindustry.com".

# Contract Initiation (PC)

▶ To create the Contract record in OAKS CI navigate to:

- ▶ Logs -> Contract
- ▶ Click Create or New

ORACLE Primavera Unifier (Development)

Agency > OAKS CI Training > OAKS CI Training 1

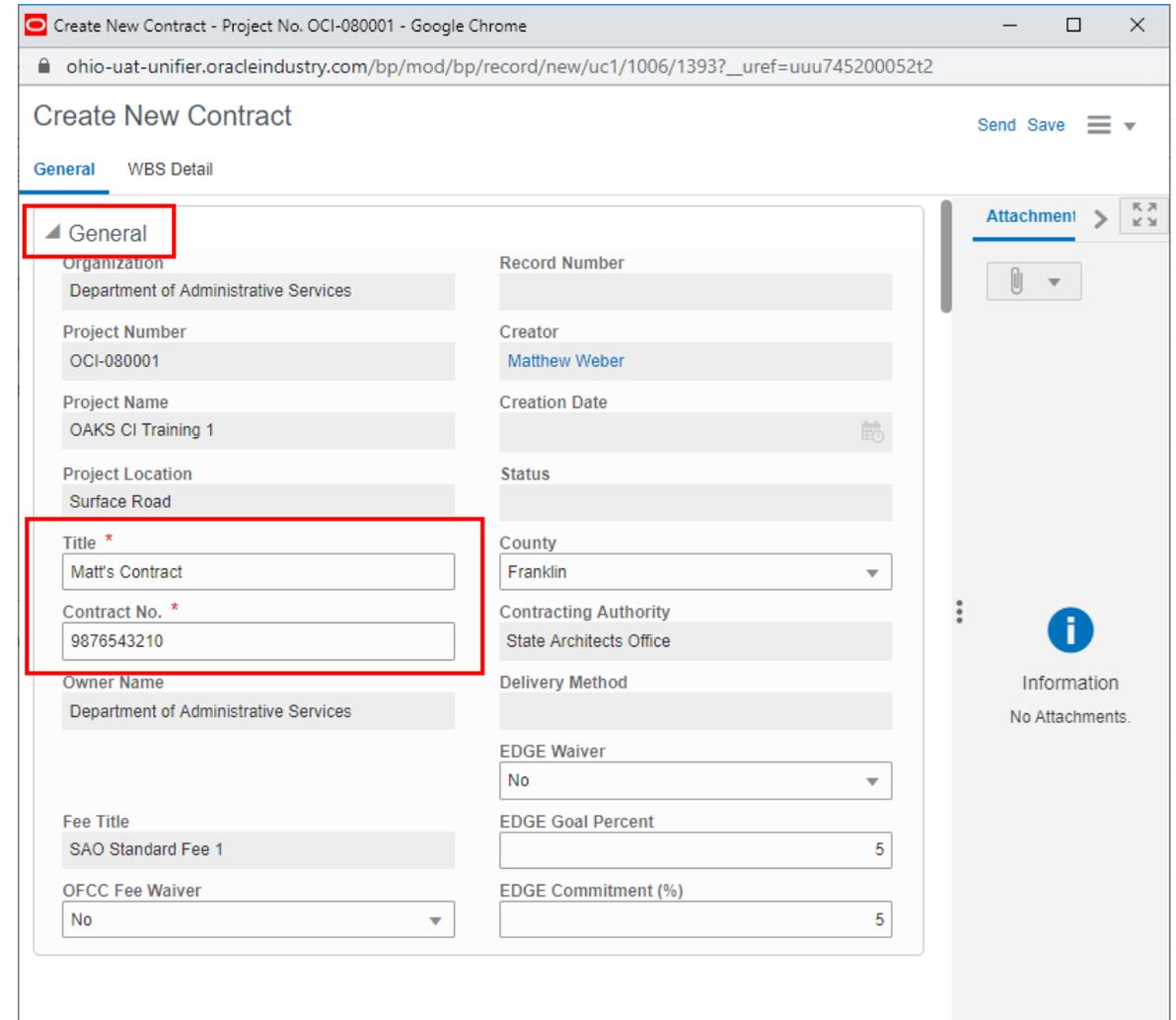
Contract

+ Create Actions View All Records

Contract No.	Contractor Name	Title
TEST NUMBER	OAKS Plumbing	TEST
OCI-080001-03	OAKS Plumbing	Fred 20091008
DRC-12001	Sands Decker Ltd.	Computer Class
DRC-100000-02	Sands Decker Ltd.	Computer Class - 0001
DRC-1	Random Roofing and Repair	Test DRC
DRC-12001	Sands Decker Ltd.	Computer Class-0001
DOT-050114-01	Sands Decker Ltd.	Bruce's Contract
DAS-01	Sands Decker Ltd.	Contract Test 1
DAS-0006	Random Roofing and Repair	Computer Class -0001
das-0001	Sands Decker Ltd.	computer class
das-0001	Sands Decker Ltd.	computer-drc 001
DAS-0001	Sands Decker Ltd.	Computer Class-0001
Contractor Test A	Sands Decker Ltd.	DAS 01
9876543210	Matt's Vendor	Matt's Contract
3445	Sands Decker Ltd.	hookstest
22-22222	Sands Decker Ltd.	Franklin Peet
15	OAKS Plumbing	mmw-contract test
123456789	Matt's Vendor	Contract MMW 001
12333	Sands Decker Ltd.	hooks2
070916	Sands Decker Ltd.	Contract v1.3 Test
070915	Random Roofing and Repair	CMR-DB Test
001	Random Roofing and Repair	TJ test for RN

# Complete Upper Form (PC)

- ▶ Complete the General section
  - ▶ All required fields are marked with a Red \*



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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uc1/1006/1393?\_uref=uuu745200052t2

### Create New Contract

Send Save

General WBS Detail

#### General

Organization	Department of Administrative Services	Record Number	
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	
Project Location	Surface Road	Status	
Title *	Matt's Contract	County	Franklin
Contract No. *	9876543210	Contracting Authority	State Architects Office
Owner Name	Department of Administrative Services	Delivery Method	
Fee Title	SAO Standard Fee 1	EDGE Waiver	No
OFCC Fee Waiver	No	EDGE Goal Percent	5
		EDGE Commitment (%)	5

Attachment

Information  
No Attachments.



# Complete Upper Form (PC)

- ▶ Complete the **Contractor Information** section

- ▶ All required fields are marked with a **Red \***

Create New Contract - Project No. OCI-080001 - Google Chrome  
ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_uref=uuu745200052t2

### Create New Contract

Send Save

General WBS Detail

#### Contractor Information

<b>Contractor Name *</b> Matt's Vendor	Joint Venture No
Federal Tax ID 12-345678	Address Line 1 30 W Spring
Contact Name	Address Line 2
Contact Phone	City Columbus
Fax No.	State Ohio
E-mail Address	ZIP 43215
<b>Trade *</b> General Contractor	Lead Contractor? Yes
Other Description	EDGE Certified Prime? * Yes
Drug Free Work Place Verified? Yes	Clean Search of State Auditors Database? Yes

Attachments  
No Attachments.



# Complete Upper Form (PC)

- ▶ Complete the **Key Contract Dates** and **Bonds Detail** sections
  - ▶ All required fields are marked with a **Red \***

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_uref=uuu745200052t2

### Create New Contract

Send Save

General WBS Detail

#### Key Contract Dates

Bid Date \*  
02/24/2020 05:00 PM (UTC-8)

Bid Expiration Date  
04/24/2020 06:00 PM (UTC-8)

Proceed Date

Contract Time (Calendar Days) \*  
365

Original Contract Completion Date

Notes

#### Bonds Detail

Surety Company \*  
Matt's Insurance

Bonds Number  
987654321

Surety Agent Name  
Matt Weber

Surety Agent Title  
Mr.

Surety Agent First Name  
Matt

Surety Agent Last Name  
Weber

Surety Agent's Power of Attorney Date  
01/01/2020 05:00 PM (UTC-8)

Ohio Department of Insurance Certificate Expiration Date  
02/28/2021 05:00 PM (UTC-8)

Amount (\$)  
0.00

Address Line 1  
30 W Spring St

Address Line 2

City  
Columbus

State  
Ohio

ZIP  
43215

Phone No.  
614-555-5555

Fax No.

Surety Email  
email@insurance.com

Information  
No Attachments.

# Complete Upper Form (PC)

- ▶ Complete the **Financial Institution** section

The screenshot shows a web browser window with the title 'Create New Contract - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_uref=uuu745200052t2'. The page title is 'Create New Contract' and it has 'Send Save' and a menu icon in the top right. Below the title are two tabs: 'General' (selected) and 'WBS Detail'. The main content area is titled 'Financial Institution' and is enclosed in a red rectangular box. It contains the following fields:

- Financial Institution: A dropdown menu with 'Huntington National Bank' selected.
- FI Contact Name: An empty text input field.
- Title: A dropdown menu with 'Select' selected.
- First Name: An empty text input field.
- Last Name: An empty text input field.
- Contact Phone Number: An empty text input field.
- Contact Fax: An empty text input field.
- E-mail Address: An empty text input field.
- Address Line 1: A text input field containing '7 Easton Oval EA4E63'.
- Address Line 2: An empty text input field.
- City: A text input field containing 'Columbus'.
- State: A dropdown menu with 'Ohio' selected.
- ZIP: A text input field containing '43219'.

Below the 'Financial Institution' section is a button labeled '▶ Contract Amount Detail'. To the right of the form is an 'Attachments' section with a paperclip icon and a dropdown menu. Below that is an 'Information' icon and the text 'Information No Attachments.'.



# Complete Upper Form (PC)

- ▶ Complete the **Contract Amount Detail** section

- ▶ All required fields are marked with a **Red \***

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_\_uref=uuu745200052t2

### Create New Contract

Send Save

General WBS Detail

**Contract Amount Detail**

Alternate	Base Bid Amount (\$) *	5,000,000.00
Alternate	Amount	0.00

Attachments

Information  
No Attachments.



# Add Line Item (PC)

- ▶ Click the **WBS Detail** tab
- ▶ Click **Add**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_uref=uuu745200052t2

### Create New Contract

Send Save

General **WBS Detail**

Add Actions

No.	WBS Code	Code Name
-----	----------	-----------

Total Amount: 0.00  
Total: 0

#### Line Item Details

WBS Code \*  
Type CBS Code or Name...

Code Name

Short Description \*

Amount (\$) \* 0.00

Notes

Cancel Save Save & Add New



# Add Lines to WBS Detail (PC)

- ▶ Click the arrow next to **WBS Code**
- ▶ Click **Collapse** to simplify list

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_\_uref=uuu745200052t2

### Create New Contract

General **WBS Detail**

Add Actions

No.	WBS Code	Code Name
-----	----------	-----------

**Line Item Details**

WBS Code \*  
Type CBS Code or Name...

Code Name

Short Description \*

Amount (\$) \* 0.00

Notes

Total Amount 0.00

Total: 0

Cancel Save Save & Add New

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_\_uref=uuu74520...

### CBS Picker

Search Print Collapse

WBS Code	WBS Name
PA-00-00	Property Acquisition Su...
PA-PA-00	Property Acquisition Ge...
PA-PA-BE	Property Acquisition Bu...
PA-PA-RC	Real Estate Commission
PA-PA-AP	Real Estate Appraisal
PA-LA-00	Land Acquisition Summ...
PA-LA-BE	Land Acquisition Budget
PA-LA-OT	Land Acquisition Expense
PA-EA-00	Easement Acquisition S...
PA-EA-BE	Easement Acquisition B...
PA-EA-OT	Easement Acquisition E...
RM-00-00	Relocation and Moving ...
RM-RM-00	Relocation and Moving ...

Total: 387

Cancel Select

# Add Lines to WBS Detail (PC)

- ▶ Click the plus sign next to appropriate WBS Code section (CE)
- ▶ Continue to expand file tree and highlight **Contract Awarded SOV Pending**
- ▶ Click **Select**

The screenshot shows two browser windows. The left window, titled 'CBS Picker - Google Chrome', displays a table with columns for 'WBS Code' and 'WBS Name'. The right window, titled 'Create New Contract - Project No. OCI-080001 - Google Chrome', shows a 'CBS Picker' dialog box with a search bar and a list of WBS codes and names. The 'CE-CE-SV' code, labeled 'Contract Awarded SOV Pending', is highlighted in blue. A red arrow points from the 'CE-00-00' code in the left pane to the 'CE-CE-SV' code in the right pane. Another red arrow points from the 'CE-CE-SV' code to the 'Select' button at the bottom right of the dialog. The 'Select' button is circled in red.

WBS Code	WBS Name
▶ PA-00-00	Property Acquisition Summary
▶ RM-00-00	Relocation and Moving Summary
▶ LE-00-00	Legal Expense Summary
▶ OR-00-00	Owner Expense Summary
▶ AE-00-00	Professional Design Summary
▶ RF-00-00	Regulatory Fees Summary
▶ CM-00-00	Construction Management Summary
▲ CE-00-00	Construction Execution Summary
▲ CE-CE-00	Construction Execution General
CE-CE-BE	Construction Execution Budget
CE-CE-SV	Contract Awarded SOV Pending
▶ CE-01-00	General Requirements
▶ CE-FC-00	Facility Construction



# Add Lines to WBS Detail (PC)

- ▶ Enter **Short Description**
- ▶ Enter **Contract Amount**
- ▶ Click **Save**

The screenshot shows a web browser window titled "Create New Contract - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_uref=uuu745200052t2". The page title is "Create New Contract" and it has "Send Save" and a menu icon. The "General" tab is selected, and the "WBS Detail" sub-tab is active. Below the tabs are "Add" and "Actions" buttons. A table header shows "No.", a clipboard icon, and "WBS Code". The "Line Item Details" panel is open, showing a form with the following fields: "WBS Code" (CE-CE-SV), "Code Name" (Contract Awarded SOV Pending), "Short Description" (Contract Description), and "Amount (\$)" (5,000,000.00). A "Notes" section is also visible. At the bottom, there are "Cancel", "Save", and "Save & Add New" buttons. A red arrow points to the "Save" button, which is also circled in red. The "Total Amount" field at the bottom left shows "0.00" and "Total: 0".



# Finish Record (PC)

- ▶ Line Item will populate
- ▶ When the record is ready to move forward, click **Send**

- ▶ Verify the Workflow Action: **PM Review**
- ▶ Click **Send**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_uref=uuu745200052t2

Create New Contract

General WBS Detail

Line Item Details Attachments Linked Records

No.	WBS Code	Code Name	Short D
001	CE-CE-SV	Contract Awarded SOV Pending	Contrat

WBS Code \*  
CE-CE-SV

Code Name  
Contract Awarded SOV Pending

Short Description \*  
Contract Description

Amount (\$) \*  
5,000,000.00

Notes

Total: 1 Total Amount 5,000,000.00

Cancel Save Save & Add New

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7444/1?\_uref=uuu745200052t2

Create New Contract Workflow Action Details

General WBS Detail

Action Details

Workflow Actions \*  
Submit For PM Review

Send For  
PM Review

To  
Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Student11;C...

CC  
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Total: 1

Cancel Send Save & Add New

# Contract 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.

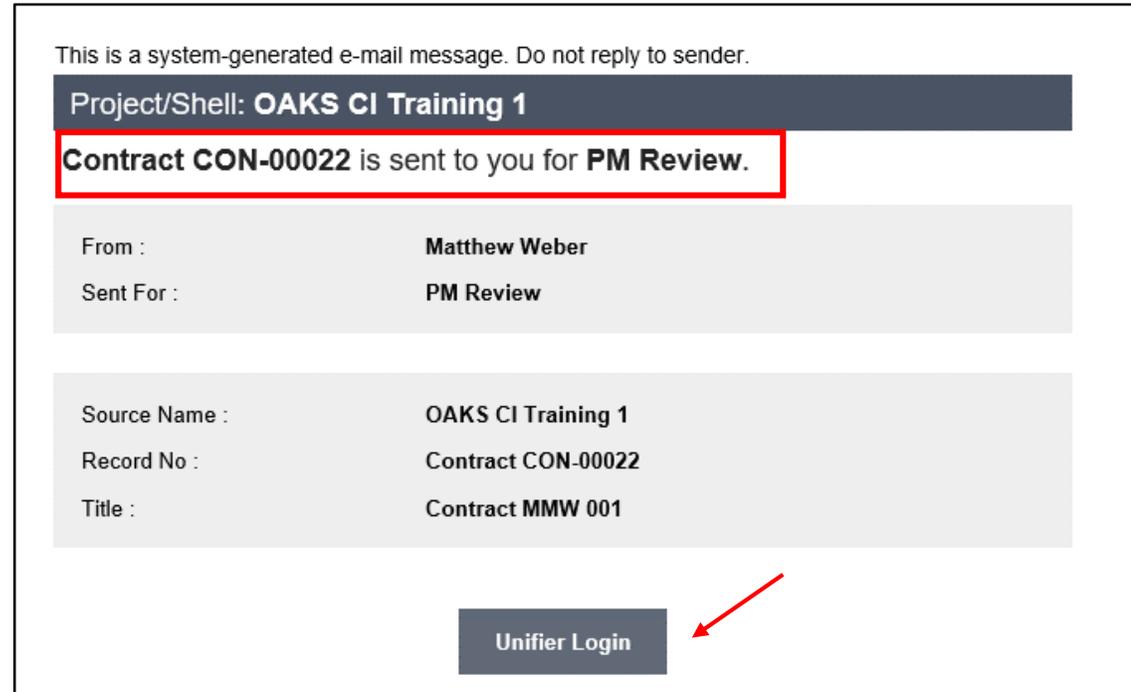
Project/Shell: **OAKS CI Training 1**

**Contract CON-00022 is sent to you for PM Review.**

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

Source Name : **OAKS CI Training 1**  
Record No : **Contract CON-00022**  
Title : **Contract MMW 001**

[Unifier Login](#)



# Accept Task (PM)

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

Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213957?task\_id=213957&parent\_id=0&viewOnly=0&project\_id=1006&m...

Contract

General WBS Detail

Task Details

From  
Matthew Weber

To  
Archana Atrey; Cindy Pizzuto; Consultant Student1; Consultant Student10; Consultant Student11; Consultant ...

Sent For  
PM Review

General

Organization Department of Administrative Services	Record Number CON-00023
Project Number OCI-080001	Creator Matthew Weber
Project Name OAKS CI Training 1	Creation Date 07/28/2020 11:44 AM (UTC-8)
Project Location Surface Road	Status Pending
Title Matt's Contract	County Franklin

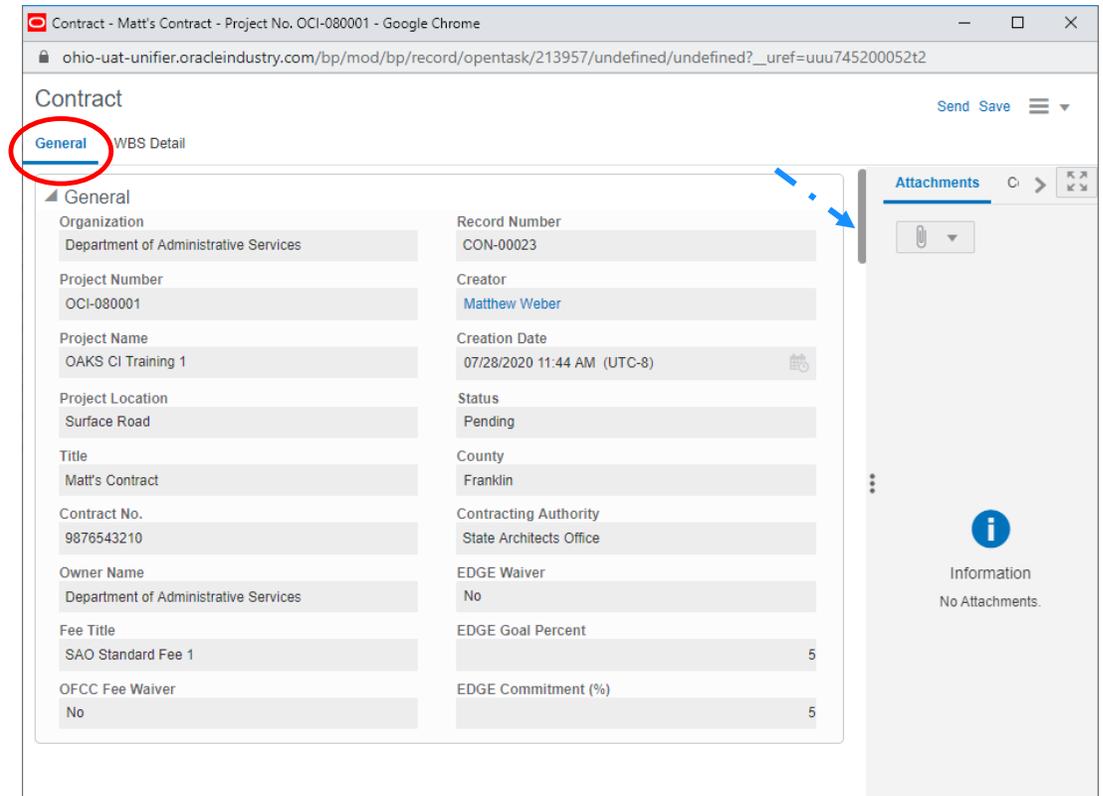
Attachments Comments

Information  
No Attachments.



# Review and Approve (PM)

- ▶ Review each section of the **General** tab
- ▶ Scroll down through the block and review all fields



Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213957/undefined/undefined?\_\_uref=uuu745200052t2

Contract

Send Save

General WBS Detail

General

Organization	Record Number
Department of Administrative Services	CON-00023
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	07/28/2020 11:44 AM (UTC-8)
Project Location	Status
Surface Road	Pending
Title	County
Matt's Contract	Franklin
Contract No.	Contracting Authority
9876543210	State Architects Office
Owner Name	EDGE Waiver
Department of Administrative Services	No
Fee Title	EDGE Goal Percent
SAO Standard Fee 1	5
OFCC Fee Waiver	EDGE Commitment (%)
No	5

Attachments

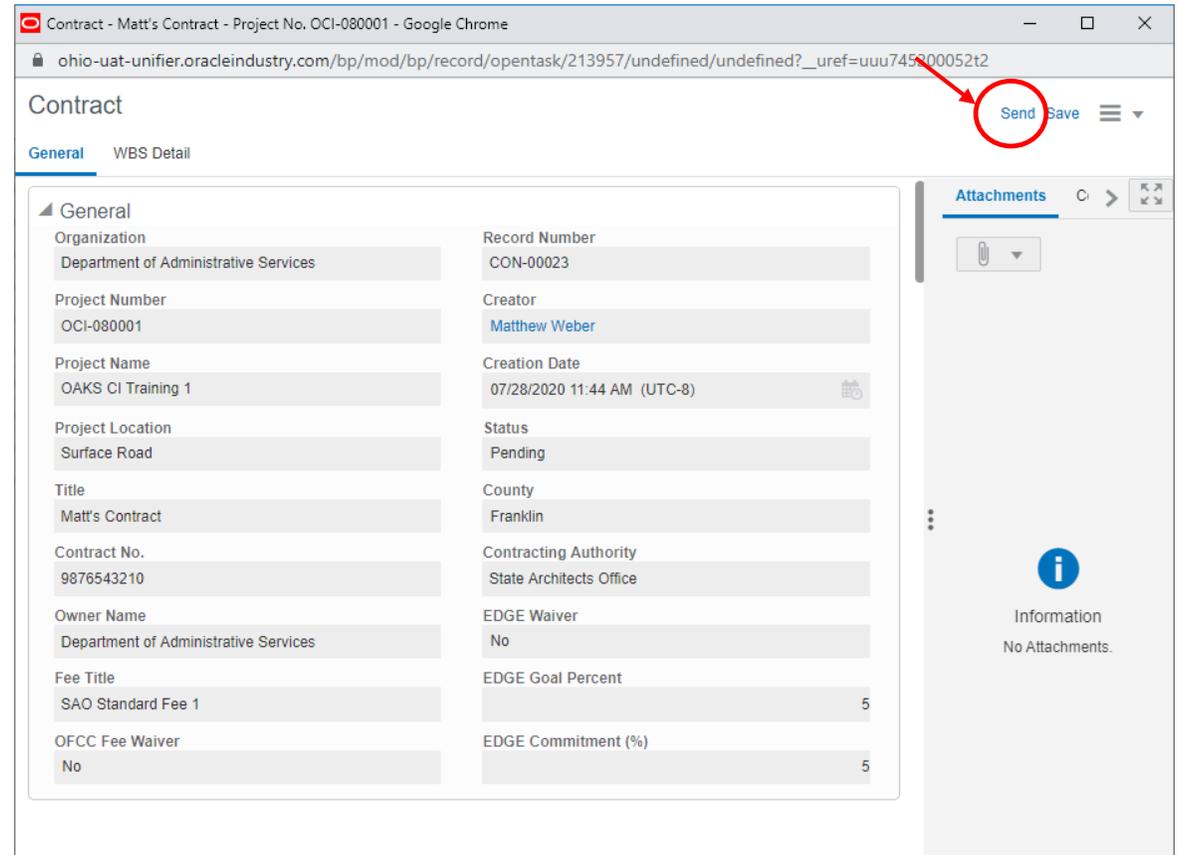
No Attachments.





# Review and Approve (PM)

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



The screenshot shows a web browser window displaying a contract record. The browser title is "Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213957/undefined/undefined?\_\_uref=uuu745200052t2". The page title is "Contract". There are two tabs: "General" (selected) and "WBS Detail". In the top right corner, there are buttons for "Send" and "Save". The "Send" button is circled in red, and a red arrow points to it from the right. Below the tabs, there is a "General" section with a table of contract details. To the right of the details is an "Attachments" section with a plus icon and a message "Information No Attachments.".

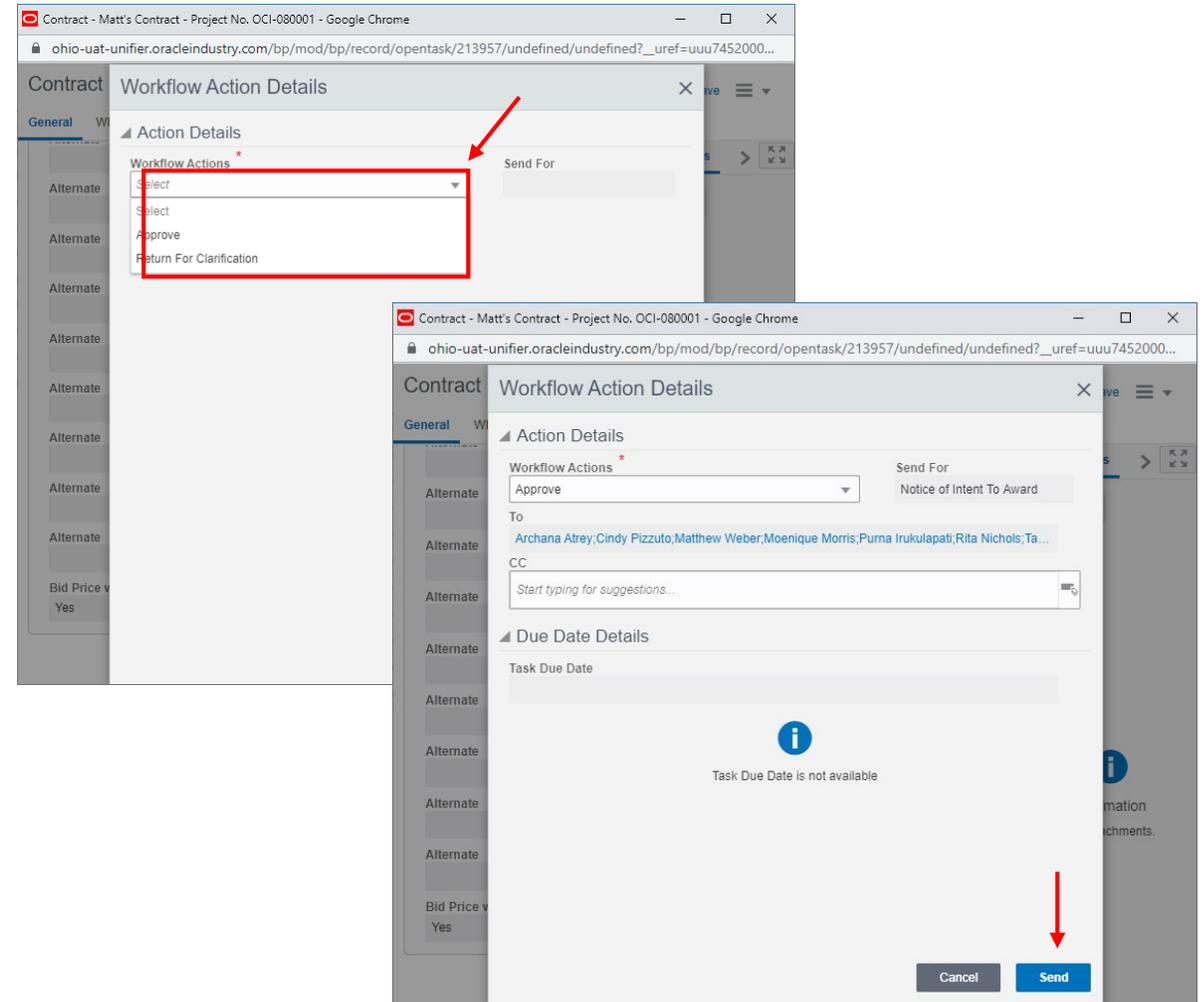
General	
Organization	Department of Administrative Services
Record Number	CON-00023
Project Number	OCI-080001
Creator	Matthew Weber
Project Name	OAKS CI Training 1
Creation Date	07/28/2020 11:44 AM (UTC-8)
Project Location	Surface Road
Status	Pending
Title	Matt's Contract
County	Franklin
Contract No.	9876543210
Contracting Authority	State Architects Office
Owner Name	Department of Administrative Services
EDGE Waiver	No
Fee Title	SAO Standard Fee 1
EDGE Goal Percent	5
OFCC Fee Waiver	No
EDGE Commitment (%)	5



# Review and Approve (PM)

## Select Workflow Action:

- ▶ If record must be returned to the PC 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 PC for Notice of Intent to Award:
  - ▶ Choose **Approve**
  - ▶ Click **Send**



# Notice of Intent to Award (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.

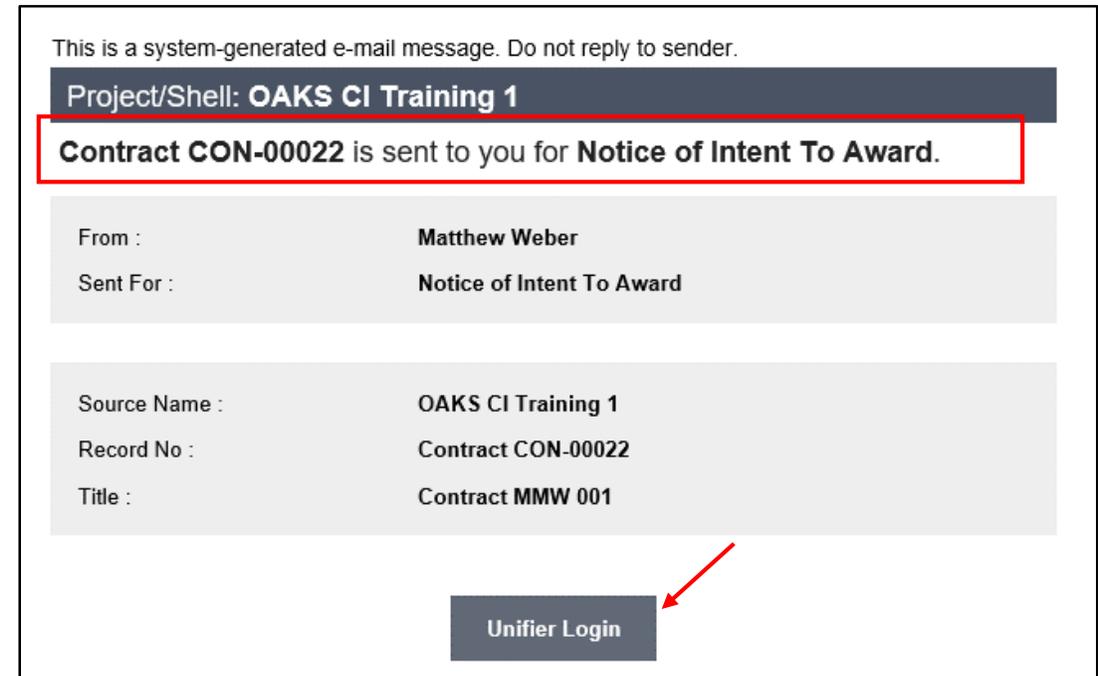
**Project/Shell: OAKS CI Training 1**

**Contract CON-00022 is sent to you for Notice of Intent To Award.**

From : **Matthew Weber**  
Sent For : **Notice of Intent To Award**

Source Name : **OAKS CI Training 1**  
Record No : **Contract CON-00022**  
Title : **Contract MMW 001**

[Unifier Login](#)



# Accept the Task (PC)

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

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

- Browser Tab:** Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome
- URL:** ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213965?task\_id=213965&parent\_id=0&viewOnly=0&project\_id=1006&model=uc...
- Page Title:** Contract
- Navigation:** General (selected), WBS Detail
- Buttons:** Accept (circled in red), Decline, and a menu icon.
- Task Details:**
  - From:** Matthew Weber
  - To:** Archana Atrey;Cindy Pizzuto;Matthew Weber;Moenique Morris;Purna Irukulapati;Rita Nichols;T...
  - Sent For:** Notice of Intent To Award
- General Information:**

Organization	Department of Administrative Services	Record Number	CON-00023
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	07/28/2020 11:44 AM (UTC-8)
Project Location	Surface Road	Status	Pending
Title	Matt's Contract	County	Franklin
- Attachments:** No Attachments.



# Create Custom Print (PC)

- ▶ PC will issue the **Notice of Intent to Award** using the custom print feature
- ▶ Choose **File -> Print -> Custom**

The screenshot shows a web browser window displaying a contract record. The browser title is "Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213965/undefined/undefined?\_\_uref=uuu745200052t2". The page title is "Contract". There are two tabs: "General" (selected) and "WBS Detail".

The "General" tab contains the following information:

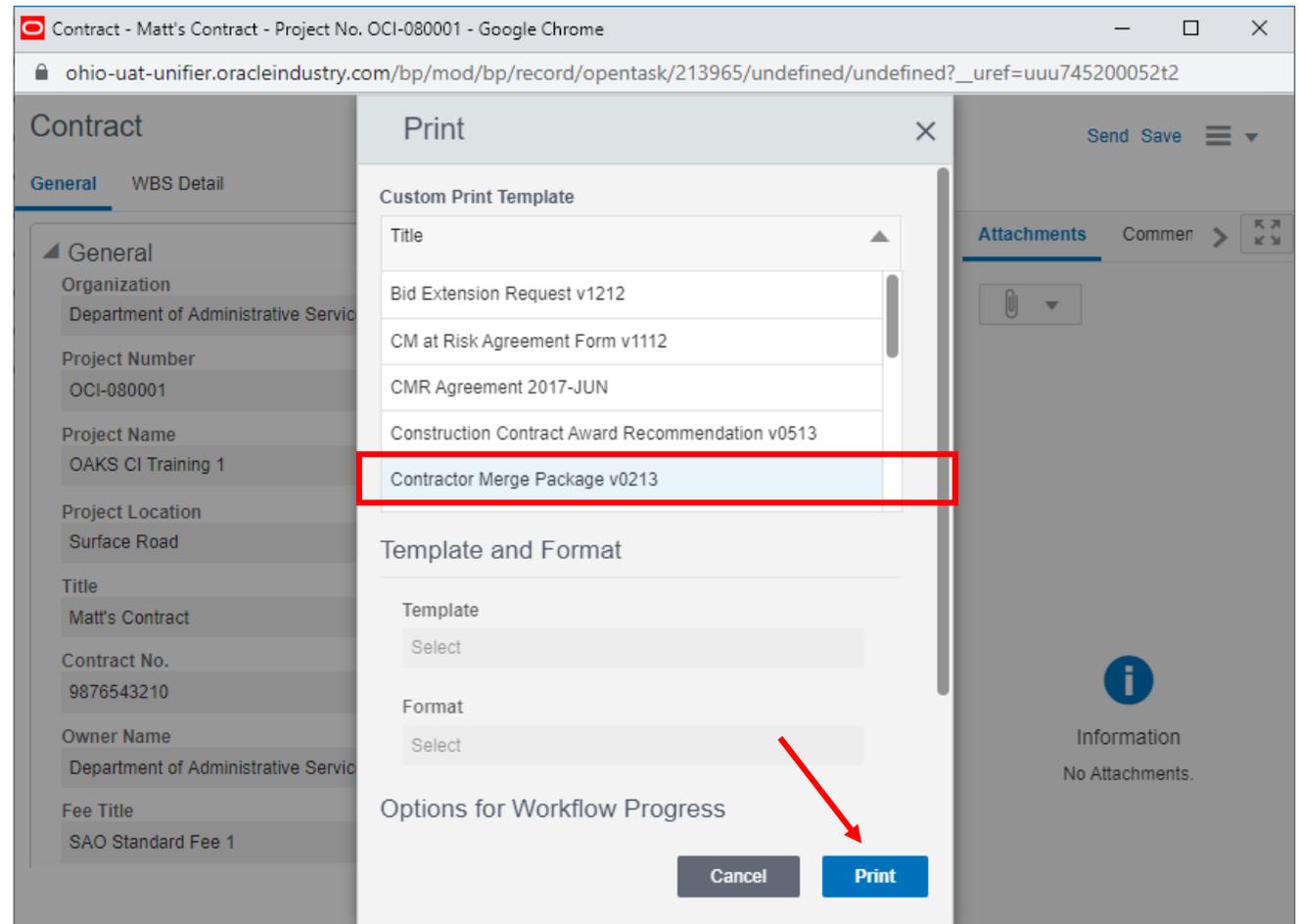
Organization	Record Number
Department of Administrative Services	CON-00023
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	07/28/2020 11:44 AM (UTC-8)
Project Location	Status
Surface Road	Pending
Title	County
Matt's Contract	Franklin
Contract No.	Contracting Authority
9876543210	State Architects Office
Owner Name	EDGE Waiver
Department of Administrative Services	No
Fee Title	EDGE Goal Percent
SAO Standard Fee 1	5
OFCC Fee Waiver	EDGE Commitment (%)
No	5

At the top right, there are buttons for "Send", "Save", and a menu icon (three horizontal lines). A red arrow points to the menu icon. The menu is open, showing options: "Export Line Item Template", "Print", "Reload", "Review", "Terminate Record", "Transfer Ownership...", "Undo Accept Task", "Help", and "Close". The "Print" option is highlighted with a red box. A sub-menu is open for "Print", showing options: "HTML ...", "PDF ...", and "Custom ...". The "Custom ..." option is highlighted with a red box. A red arrow points to the "Custom ..." option.



# Create Custom Print (PC)

- ▶ Choose **Contractor Merge Package**
- ▶ Click **Print**



# Create Custom Print (PC)

- ▶ Word document will be created at the bottom of your record screen
- ▶ Click to open

The screenshot displays a web browser window with the URL `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213965/undefined/undefined?_uref=uuu745200052t2`. The page title is "Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome". The main content area shows contract details under the "General" tab. The details include:

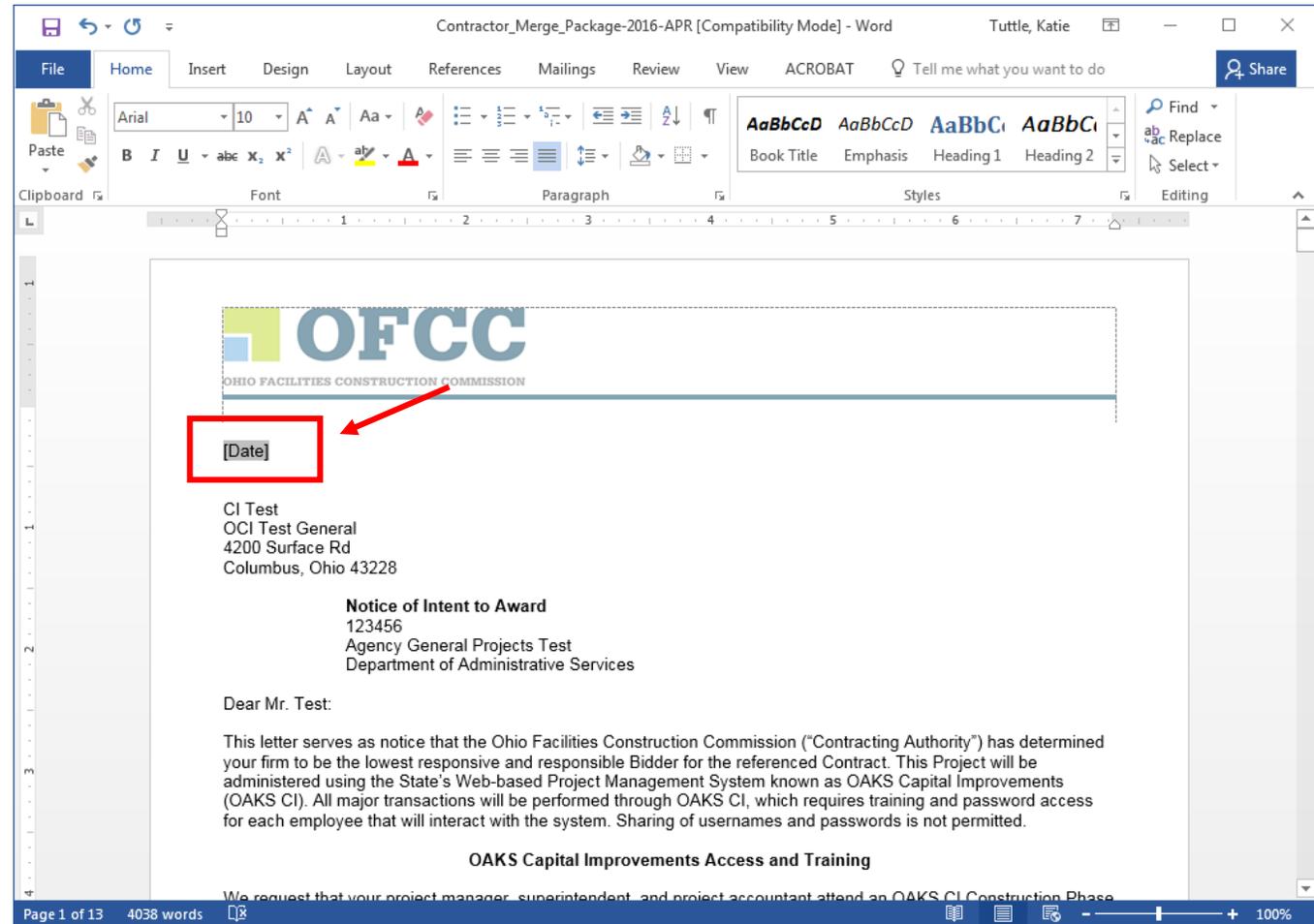
Organization	Department of Administrative Services	Record Number	CON-00023
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	07/28/2020 11:44 AM (UTC-8)
Project Location	Surface Road	Status	Pending
Title	Matt's Contract	County	Franklin
Contract No.	9876543210	Contracting Authority	State Architects Office
Owner Name	Department of Administrative Services	EDGE Waiver	No
Fee Title	SAO Standard Fee 1	EDGE Goal Percent	5
OFCC Fee Waiver	No	EDGE Commitment (%)	5

On the right side, there is an "Attachments" section with a "Document Manager..." button. Below it, an information icon and the text "Information No Attachments." are visible. At the bottom of the page, a document icon labeled "Contractor+Merg....doc" is highlighted with a red box, and a red arrow points to it from the left.



# Edit Custom Print (PC)

- ▶ Fill in all gray fields as necessary
- ▶ Distribute associated letters as appropriate



# Send Record (PC)

- ▶ Attach Notice of Intent to Award to record and any additional necessary documentation
- ▶ Click **Send**

Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213965/undefined/undefined?\_\_uref=uuu74520005zt2

Contract

Send Save

General WBS Detail

General

Organization	Record Number
Department of Administrative Services	CON-00023
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	07/28/2020 11:44 AM (UTC-8)
Project Location	Status
Surface Road	Pending
Title	County
Matt's Contract	Franklin
Contract No.	Contracting Authority
9876543210	State Architects Office
Owner Name	EDGE Waiver
Department of Administrative Services	No
Fee Title	EDGE Goal Percent
SAO Standard Fee 1	5
OFCC Fee Waiver	EDGE Commitment (%)
No	5

Attachments

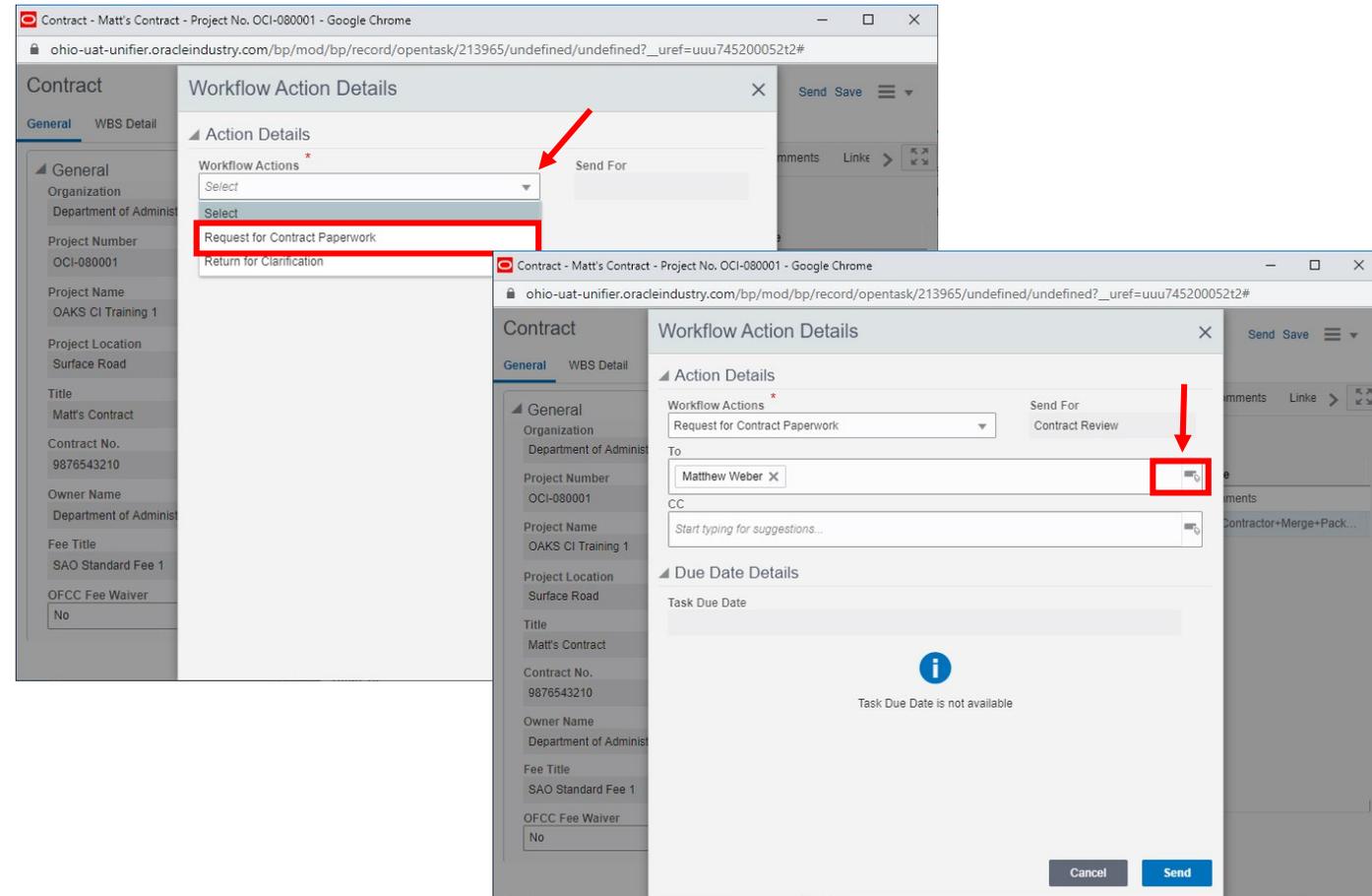
Document Manager...

Information  
No Attachments.



# Send Record (PC)

- ▶ Choose Workflow Action: **Request Contract Paperwork**
- ▶ Click the selection button in the **To:** field



# Send Record (PC)

- ▶ If the PC has the signed contract paperwork, choose the PC as the recipient of this task
- ▶ If the Contractor still needs to provide signed contract paperwork to the PC, then the Contractor should be chosen as the recipient

- Choose the appropriate name
- Click the **Select** arrow
- Click **Done**

Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213965/undefined/undefined?\_\_uref=uuu745200052t2#

User and Group Picker

View Users/Groups

Users and Groups > Contractor

Available Items		
Name	First Name	Last Name
CS Consultant Student14	Consultant	Student14
CS Consultant Student15	Consultant	Student15
CS Consultant Student2	Consultant	Student2
CS Consultant Student3	Consultant	Student3
CS Consultant Student4	Consultant	Student4
CS Consultant Student5	Consultant	Student5
CS Consultant Student6	Consultant	Student6
CS Consultant Student7	Consultant	Student7
CS Consultant Student8	Consultant	Student8
CS Consultant Student9	Consultant	Student9
MW Matthew Weber	Matthew	Weber

Total: 42

Selected Items	
Name	Company
Users	
MW Matthew Weber	State of Ohio

Cancel Done



# Send Record (PC)

- ▶ “To” box will populate with chosen user
- ▶ Click **Send**

The screenshot shows a web browser window with the URL `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/213965/undefined/undefined?_uref=uuu745200052t2#`. The main content area is titled "Contract" and has a "Workflow Action Details" dialog box open. The dialog box has a "Send" button highlighted with a red circle and a red arrow pointing to it. The dialog box contains the following information:

- Action Details**
  - Workflow Actions: Request for Contract Paperwork
  - Send For: Contract Review
  - To: Matthew Weber
  - CC: Start typing for suggestions...
- Due Date Details**
  - Task Due Date: Task Due Date is not available

At the bottom of the dialog box, there are two buttons: "Cancel" and "Send". The "Send" button is highlighted with a red circle and a red arrow pointing to it.



# Contractor Review

- ▶ Contractor will sign contract paperwork, they will then:
  - ▶ Review record in OAKS CI
  - ▶ Attach signed contract paperwork
  - ▶ Send the record to the PC for final review.



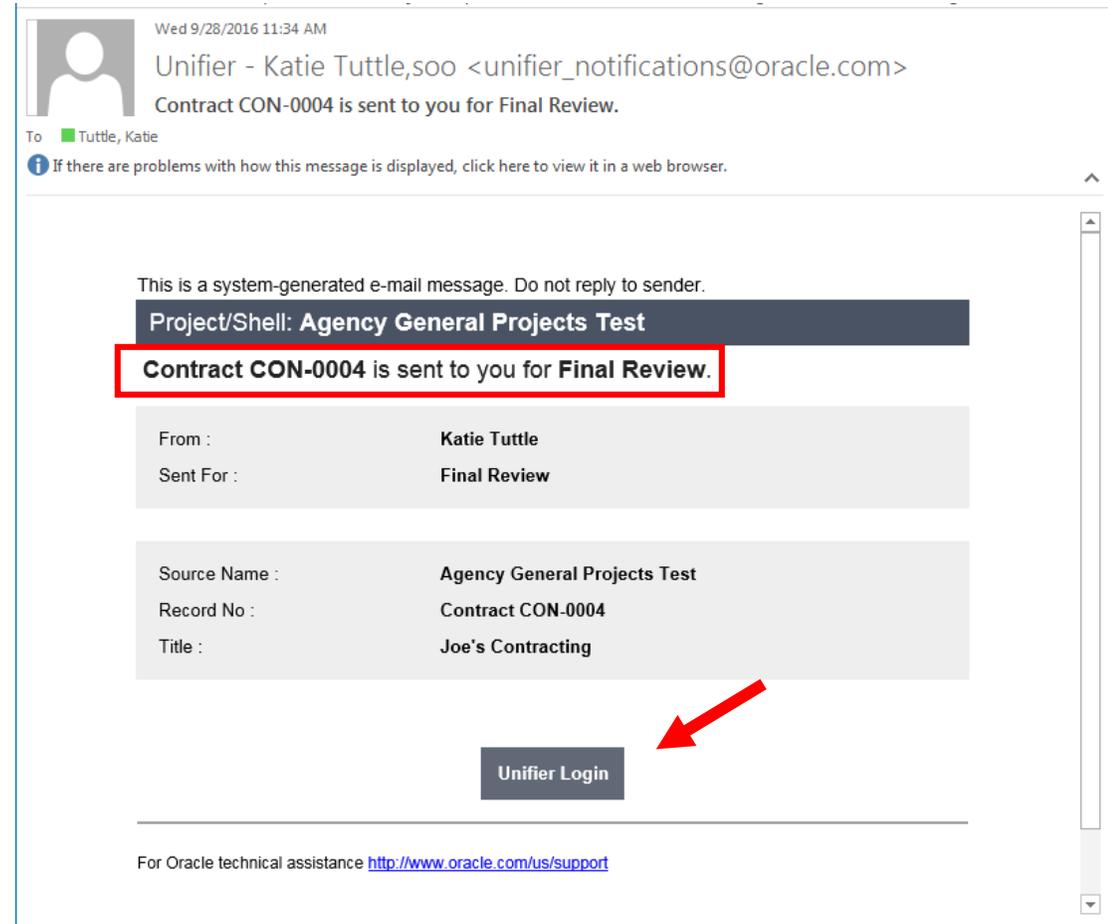
# Project Coordinator Contract Review

- ▶ If the PC has the signed contract paperwork, then the PC should attach the paperwork and send the record to the next step



# PC Final Review

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



# Accept the Task (PC)

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

Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214012?task\_id=214012&parent\_id=0&viewOnly=0&project\_id=1006&model=uc1...

## Contract

General WBS Detail

### Task Details

From: Matthew Weber

To: Archana Atrey;Cindy Pizzuto;Matthew Weber;Moenique Morris;Purna Irukulapati;Rita Nichol...

Sent For: Final Review

### General

Organization	Record Number
Department of Administrative Services	CON-00023
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	07/28/2020 11:44 AM (UTC-8)
Project Location	Status
Surface Road	Accepted
Title	County
Matt's Contract	Franklin

### Attachments

Name	Tit
Published Attachments	
<input checked="" type="checkbox"/> Contractor+Merge+Pac...	

Total: 1



# Complete Pre-Award Submittals (PC)

- ▶ Under the **General** tab, scroll down to **Pre-Award Submittals** and complete as necessary

Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214012/undefined/undefined?\_\_uref=uuu745200052t2

Contract

General WBS Detail

Send Save

Pre-Award Submittals

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

<input checked="" type="checkbox"/> Certificate of Compliance	Certificate of Compliance Attached
<input checked="" type="checkbox"/> Certificate of Good Standing	Certificate of Good Standing Attached
<input checked="" type="checkbox"/> Ohio Worker's Compensation Certificate	Ohio Worker's Compensation Certificate Attached
<input checked="" type="checkbox"/> Certificate of Compliance with Affirmative Action	Certificate of Compliance with Affirmative Action Attached
<input checked="" type="checkbox"/> Certificate of Insurance	Certificate of Insurance Attached
<input checked="" type="checkbox"/> Proof of Licensing	Proof of Licensing Attached

Release

Controlling Board Release	Approval Reference No.
Fred 20091007	A1
Approval Date	Release Amount (\$)
10/07/2009 10:00 AM (UTC-8)	6,500,000.00
Local Funds Release	Approval Reference No.
Type a Title...	
Approval Date	Release Amount (\$)
	0.00
OAKS Contract No. (Bid No.)	Total Release Amount (\$)
	6,500,000.00

Attachments

Published Attachmen

Total: 1



# Complete Release and PO Details (PC)

- ▶ Complete the *Controlling Board Release* section (if applicable) and the *Purchase Order Details* section by using the **Select** button and choosing the appropriate records that were created.
- ▶ ***If the appropriate PO is not available, [Record Purchase Order](#) section for instructions on how to record a PO.***

The screenshot displays a web application interface for a contract. The browser title is "Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214012/undefined/undefined?\_uref=uuu745200052t2". The page is titled "Contract" and has tabs for "General" and "WBS Detail".

The "Pre-Award Submittals" section is expanded, showing a "Release" section. This section is highlighted with a red box. It contains the following fields:

- Controlling Board Release: Fred 20091007
- Approval Date: 10/07/2009 10:00 AM (UTC-8)
- Local Funds Release: Type a Title...
- Approval Date: [Empty]
- OAKS Contract No. (Bid No.): [Empty]

To the right of the "Release" section are summary fields:

- Approval Reference No.: A1
- Release Amount (\$): 6,500,000.00
- Approval Reference No.: [Empty]
- Release Amount (\$): 0.00
- Total Release Amount (\$): 6,500,000.00

The "Purchase Order Details" section is also expanded. It contains the following fields:

- PO Record: PO-0002 (This field has a "Select" button circled in red with an arrow pointing to it)
- OAKS PO No.: DAS01-000000nn
- OAKS PO Date: [Empty]
- Local PO No.: [Empty]
- Local PO Date: [Empty]

To the right of the "Purchase Order Details" section are summary fields:

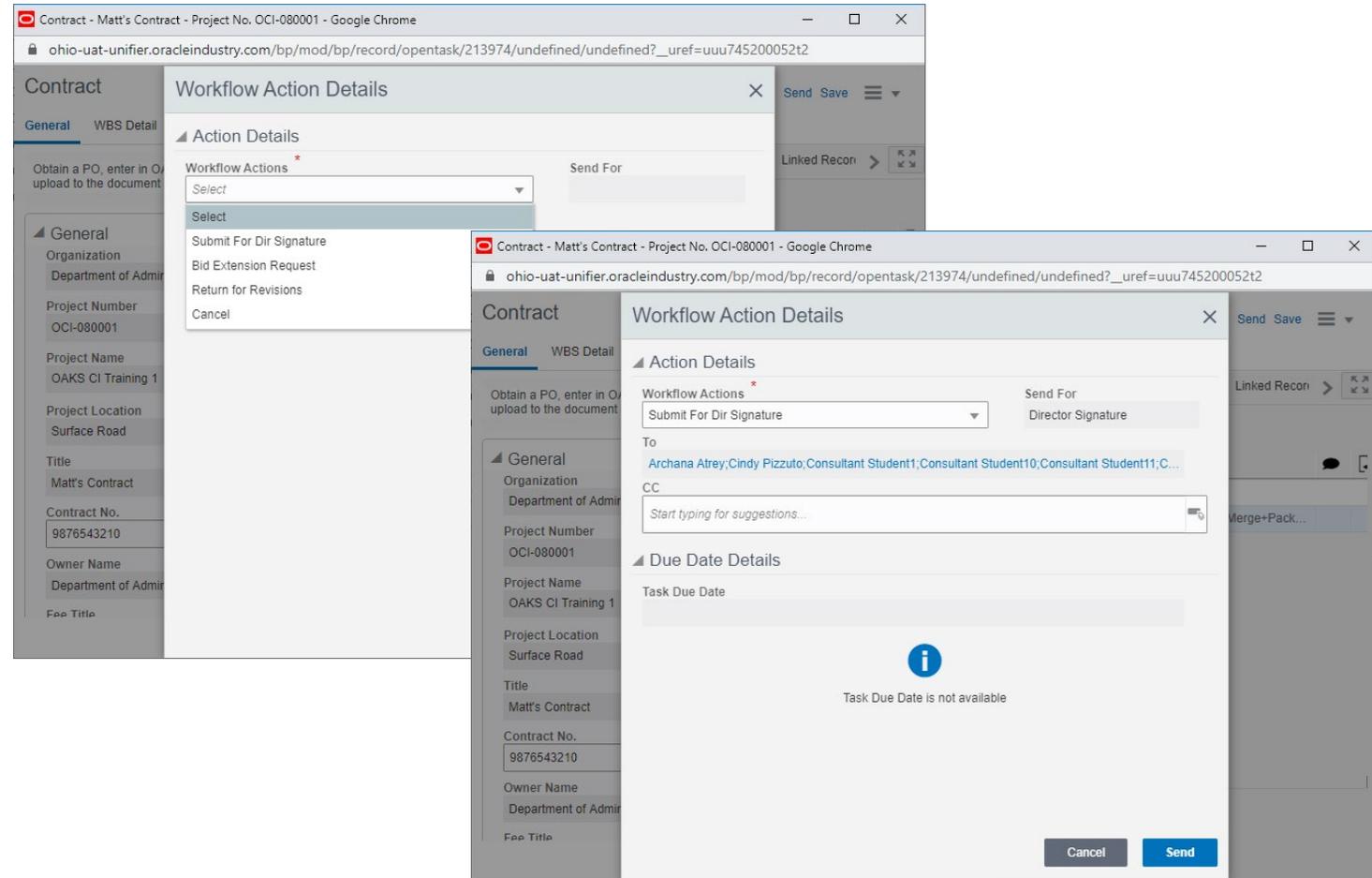
- OAKS PO Amount (\$): 1,300,000.00
- Local PO Amount (\$): 0.00
- Total Amount (\$): 1,300,000.00

An "Attachments" panel is visible on the right side of the page, showing "Published Attachments" with a "Cont" button.



# Send Record (PC)

- ▶ Choose Workflow Action
- ▶ Click Send



# Signature Steps (Contracting Authority, PC)

The record will now go to:

- ▶ Director step for signature (Contracting Authority)
- ▶ Attorney General step (Project Coordinator)
  
- ▶ Next, the record will go to the PC for their final steps



# Final Steps for the PC

Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214085?task\_id=214085&parent\_id=0&viewOnly=0&project\_id=1006&model=uc1&...

### Contract

Accept Decline

General WBS Detail

#### Task Details

From: Matthew Weber

To: Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Student11

Sent For: AG Signature

#### General

Organization	Department of Administrative Services	Record Number	CON-00023
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	07/28/2020 11:44 AM
Project Location	Surface Road	Status	Accepted
Title	Matt's Contract	County	Franklin

Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214085/undefined/undefined?\_\_uref=uuu745200052t2

### Contract

Send Save

Export Line Item Template

Attachments HTML ... Print

#### General

Organization	Department of Administrative Services
Project Number	OCI-080001
Project Name	OAKS CI Training 1
Project Location	Surface Road
Title	Matt's Contract
Contract No.	9876543210
Owner Name	Department of Administrative Services

Print

#### General

Organization	Department of Administrative Services
Project Number	OCI-080001
Project Name	OAKS CI Training 1

# Final Steps for the PC

- ▶ The Project Coordinator is responsible for the final steps in the contracting process which include:
  - ▶ AG Signature
  - ▶ Issue Notice to Proceed (via Custom Print) and enter the Proceed Date into the OAKS CI record



# Final Steps for the PC

- ▶ Enter Proceed Date

Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214093/undefined/undefined?...

### Contract

Send Save

General WBS Detail

#### Key Contract Dates

Bid Date	02/24/2020 05:00 PM (UTC-8)
Bid Expiration Date	04/24/2020 06:00 PM (UTC-8)
Contract Time (Calendar Days)	365
Original Contract Completion Date	07/28/2021 05:00 PM (UTC-8)

Proceed Date \* 07/28/2020 05:00 PM (UTC-8)

#### Bid Extension

#### Notes

Attachm

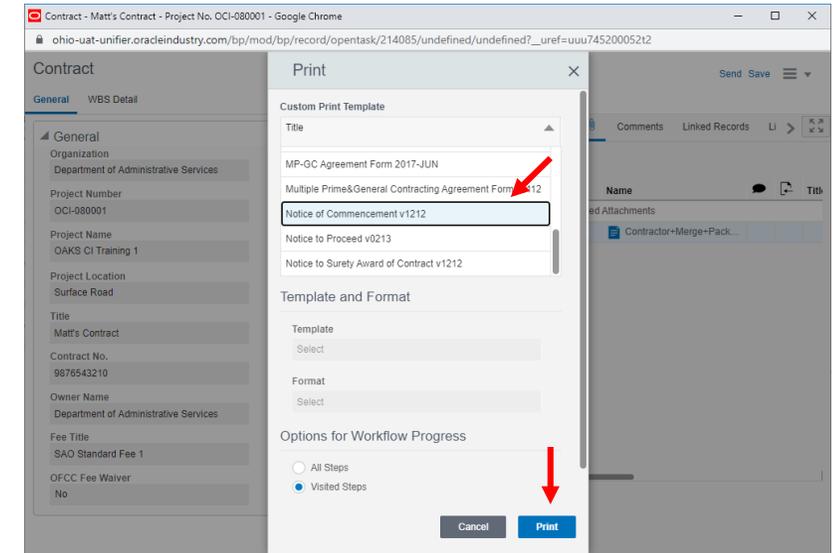
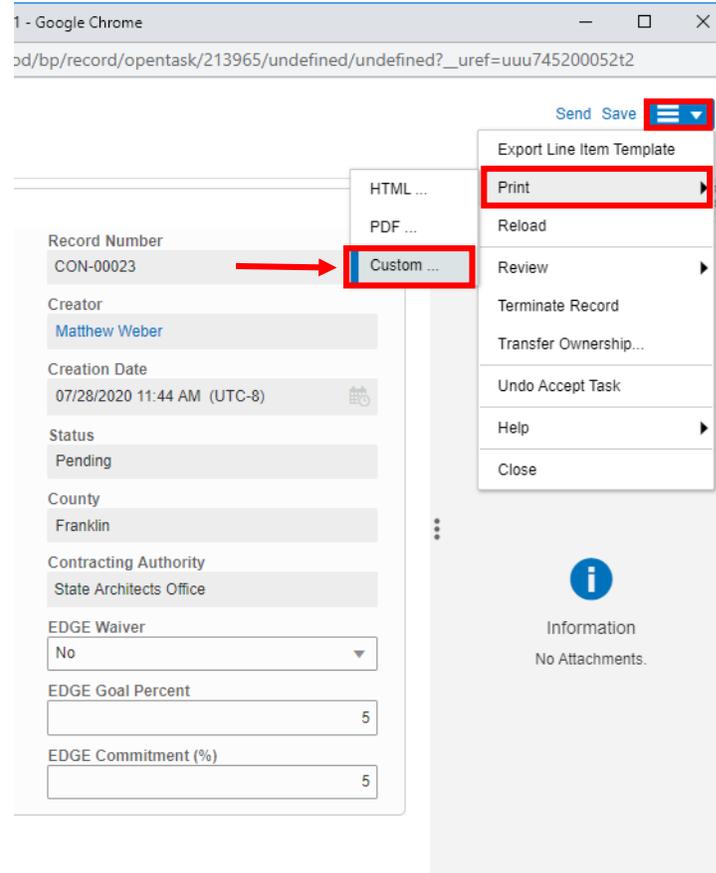
Published A

Total: 1



# Final Steps for the PC

- ▶ Create custom print document
- ▶ Click **Menu** - > **Print** -> **Custom**
- ▶ Select **Notice of Commencement**
- ▶ Click **Print**



# Final Steps for the PC

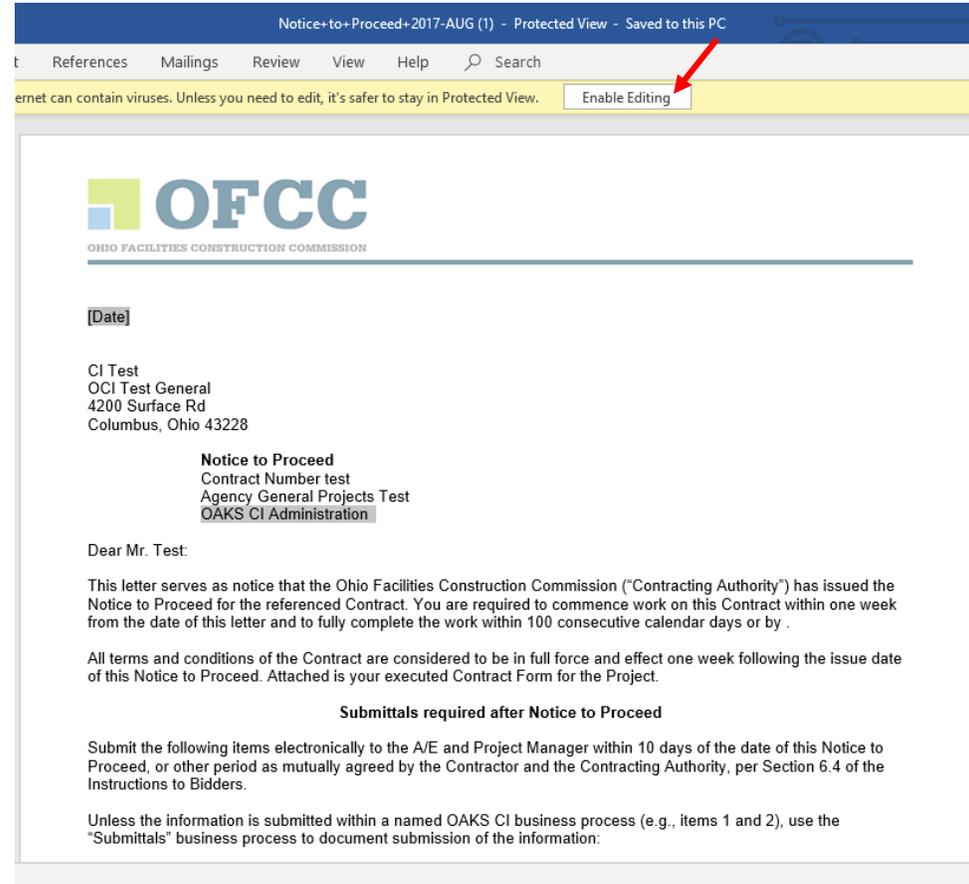
- ▶ The document will download to your PC and display at the bottom of the record
- ▶ Click to open

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

- Browser: Google Chrome
- Page Title: Contract - Matt's Contract - Project No. OCI-080001
- URL: ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214093/undefined/undefined?\_\_uref=uuu745200052t2
- Page Content: Contract details form with tabs for 'General' and 'WBS Detail'. The 'General' tab is active, showing fields for Contact Name, Contact Phone, Fax No., E-mail Address, Trade (General Contractor), Other Description, Drug Free Work Place Verified? (Yes), Address Line 2, City (Columbus), State (Ohio), ZIP (43215), EDGE Certified Prime? (Yes), and Clean Search of State Auditors Database? (Yes).
- Key Contract Dates section:
  - Bid Date: 02/24/2020 05:00 PM (UTC-8)
  - Bid Expiration Date: 04/24/2020 06:00 PM (UTC-8)
  - Proceed Date: 07/28/2020 05:00 PM (UTC-8)
  - Contract Time (Calendar Days): 365
  - Original Contract Completion Date: 07/28/2021 05:00 PM (UTC-8)
- Attachments section: A list of attachments is shown, with one attachment named 'Notice+of+Comm....doc' highlighted by a red box and a red arrow pointing to it.

# Final Steps for the PC

- ▶ Click **Enable Editing**
- ▶ Modify the custom print document as needed



Notice+to+Proceed+2017-AUG (1) - Protected View - Saved to this PC

References Mailings Review View Help Search

Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. **Enable Editing**

**OFCC**  
OHIO FACILITIES CONSTRUCTION COMMISSION

[Date]

CI Test  
OCI Test General  
4200 Surface Rd  
Columbus, Ohio 43228

**Notice to Proceed**  
Contract Number test  
Agency General Projects Test  
OAKS CI Administration

Dear Mr. Test:

This letter serves as notice that the Ohio Facilities Construction Commission ("Contracting Authority") has issued the Notice to Proceed for the referenced Contract. You are required to commence work on this Contract within one week from the date of this letter and to fully complete the work within 100 consecutive calendar days or by .

All terms and conditions of the Contract are considered to be in full force and effect one week following the issue date of this Notice to Proceed. Attached is your executed Contract Form for the Project.

**Submittals required after Notice to Proceed**

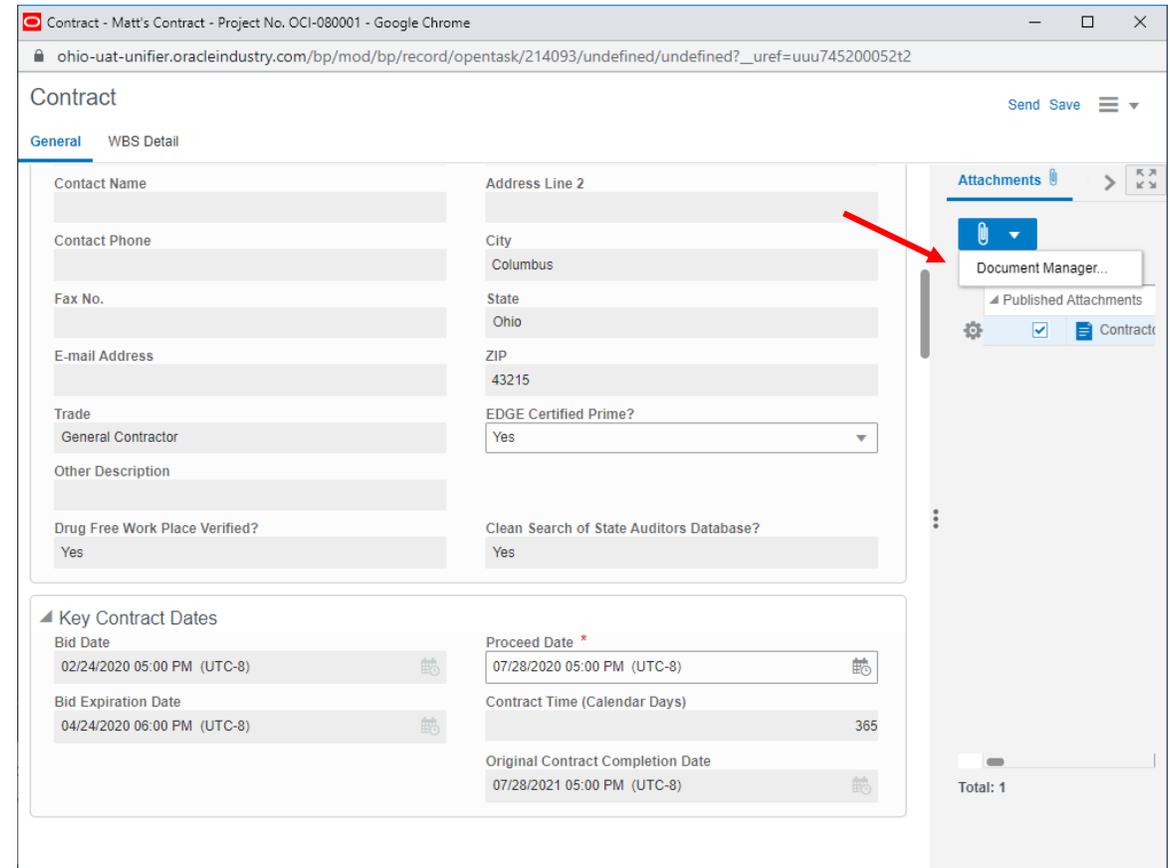
Submit the following items electronically to the A/E and Project Manager within 10 days of the date of this Notice to Proceed, or other period as mutually agreed by the Contractor and the Contracting Authority, per Section 6.4 of the Instructions to Bidders.

Unless the information is submitted within a named OAKS CI business process (e.g., items 1 and 2), use the "Submittals" business process to document submission of the information:



# Final Steps for the PC

- ▶ Upload all final documents to Document Manager including Notice to Proceed and attach to record



The screenshot shows a web browser window with the title "Contract - Matt's Contract - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214093/undefined/undefined?\_\_uref=uuu745200052t2". The page displays a "Contract" form with two tabs: "General" (selected) and "WBS Detail". The form contains various input fields for contact information, address, and dates. A red arrow points to the "Attachments" sidebar on the right, which shows a "Document Manager..." button and a list of "Published Attachments" including a file named "Contract".

Field	Value
Contact Name	
Contact Phone	
Fax No.	
E-mail Address	
Trade	General Contractor
Other Description	
Drug Free Work Place Verified?	Yes
Address Line 2	
City	Columbus
State	Ohio
ZIP	43215
EDGE Certified Prime?	Yes
Clean Search of State Auditors Database?	Yes
Bid Date	02/24/2020 05:00 PM (UTC-8)
Bid Expiration Date	04/24/2020 06:00 PM (UTC-8)
Proceed Date *	07/28/2020 05:00 PM (UTC-8)
Contract Time (Calendar Days)	365
Original Contract Completion Date	07/28/2021 05:00 PM (UTC-8)



# Final Steps for the PC

- ▶ Keep record at this step until SOV has been approved
- ▶ **Important Note:**
  - ▶ **Transfer ownership of the contract to the Contractor**
    - ▶ **This must be done prior to the creation of the SOV**

The image displays two screenshots from a web browser showing the 'Contract' page. The top screenshot shows the 'Contract' page with a dropdown menu open, highlighting the 'Transfer Ownership...' option. A red arrow points to the 'Transfer Ownership...' option. The bottom screenshot shows the 'Transfer Ownership' dialog box with a red arrow pointing to the 'Transfer' button. The dialog box contains a dropdown menu with 'Matthew Weber' selected, a 'Cancel' button, and a 'Transfer' button. The background shows the 'Contract' page with fields for Contact Name, Address Line 2, Contact Phone, City, Fax No., State, E-mail Address, ZIP, Trade, General Contractor, Other Description, Drug Free Work Place Verified, and Key Contract Dates.

# Final Steps for the PC

- ▶ Click **Send**
- ▶ Verify Workflow Action:  
**Hold for SOV Approval**
- ▶ Click **Send**

The image shows two screenshots from a web application. The top screenshot shows a browser window with a URL bar containing 'opentask/214093/undefined/undefined?\_uref=uuu745200052t2'. A red arrow points to a 'Send' button in the top right corner, which is highlighted with a red box. The bottom screenshot shows a 'Workflow Action Details' dialog box. The 'Workflow Actions' dropdown is set to 'Hold for SOV Approval'. The 'Send For' field is 'SOV Approval Verification'. The 'To' field contains a list of names: 'Archana Atrey;Cindy Pizzuto;Matthew Weber;Moenique Morris;Purna Irukulapati;Rita Nichols;Ta...'. The 'CC' field is empty. The 'Task Due Date' field is empty, and a message below it says 'Task Due Date is not available'. A red arrow points to a 'Send' button in the bottom right corner, which is highlighted with a red box.



# Record Purchase Order

## (Owner Financial)



# Recording the Purchase Order (Owner Financial)

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...>. The page displays a search bar with the text "DPS" entered. Below the search bar, a dropdown menu is open, showing a list of projects. The projects are listed in a table with columns for Name, Number, and Location. A red box highlights the search bar, and red arrows point to the search bar and a project entry.

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 (Owner Financial)

▶ To record your Purchase Order in OAKS CI navigate to:

- ▶ Logs -> Purchase Orders
- ▶ Click Create or New

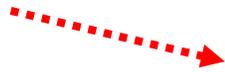
The screenshot displays the Oracle Primavera Unifier (Development) interface. The left-hand navigation menu is open, showing a list of document types. The 'Logs' option is circled in red, and a red arrow points to the 'Purchase Orders' option at the bottom of the menu. The main content area shows the 'Purchase Orders' page with a '+ Create' button circled in red. Below the button is a table with columns for 'Title' and 'Contract'.

Title	Contract
Professional Services TEJ	test edit f
CMR Purchase Order	test edit f
title	Wednesd
Pallets	
Highway 06 Revisited	Katie's Co
CADC Boiler Project #1	jim
DMR123	Training
Franklin Project1	Test Agre
17504	Test Agre
PO 1	test edit f
PO #1	123Test A
3617	Test Agre
PO #1	Training
Po #1	marie cas
PO-001	RW Sette
Greenleaf	Test Agre
CSU	Test Agre
purchase order 1	Test Agre
PO 0018723792	Test Agre
Purchase Order 1	Test Agre
Monday testing	Test Agre
PO for Test #1	Test Agre
sample	



# Record a Purchase Order (Owner Financial)

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

A screenshot of a web browser window showing the 'Create New Purchase Orders' form. The browser title is 'Create New Purchase Orders - Project No. OCI-080001 - Google Chrome' and the URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1006?\_uref=uuu387999349t2'. The form has a 'General' tab selected. The 'General' section contains several fields: 'Organization' (Department of Administrative Services), 'Project Number' (OCI-080001), 'Project Name' (OAKS CI Training 1), 'Record Number', 'Creator' (Matthew Weber), and 'Creation Date'. Below these are 'Project Location' (Surface Road), 'Title \*' (PO #123), and 'Vendor \*' (Sands Decker Ltd.). To the right of these are 'Status \*' (Dispatched), 'PO Purpose \*' (Contract), and 'Financial System of Record \*' (OAKS FIN). At the bottom of the form is a 'Change Status' dropdown menu with 'Select' chosen. On the right side of the form, there is an 'Attachments' section with a paperclip icon and a dropdown arrow, and an 'Information' section with a blue 'i' icon and the text 'No Attachments.' A red dashed arrow points from the second bullet point in the list to the 'Status' dropdown menu.

# Record a Purchase Order (Owner Financial)

- Under PO Type select the appropriate record type **(only pick one)** then click select to choose your record

The screenshot shows the 'Create New Purchase Orders' interface. The 'PO Type' section is active, with a note: 'NOTE: Only pick one PO TYPE per record.' The 'Contract Name' dropdown is highlighted with a red box and contains 'Contract Test 1'. A red arrow points from this dropdown to a 'Contract' selection dialog box. The dialog box displays a table of contracts:

Contract No.	Contractor Name	Title	Original Contract Completion	Status	Total Contract Amount
22-22222	Sands Decker Ltd.	Franklin Peet	03/20/2009 12:00 ...	Final_Approved	89.00
001	Random Roofing and Repair	TJ test for RN	08/24/2014 10:00 ...	Final_Approved	5,000.00
12333	Sands Decker Ltd.	hooks2		Accepted	42,000.00
TEST NUMBER	OAKS Plumbing	TEST		Pending	45,000.00
3445	Sands Decker Ltd.	hookstest		Accepted	45,000.00
DOT-050114-01	Sands Decker Ltd.	Bruce's Contract		Pending	143,123.00
DAS-0005	Random Roofing and Repair	Computer Class -0001	03/04/2013 08:00 ...	Final_Approved	150,000.00
DAS-01	Sands Decker Ltd.	Contract Test 1		Accepted	200,000.00
Contractor Test A	Sands Decker Ltd.	DAS 01	07/03/2015 05:00 ...	Final_Approved	200,000.00

The dialog box also includes a search bar, a 'Total: 23' indicator, and 'Cancel' and 'Select' buttons.



# Record a Purchase Order (Owner Financial)

- ▶ 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)

Create New Purchase Orders - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1006?\_uref=uuu387999349t2

### Create New Purchase Orders

Submit Save

General PO Distribution Lines

#### PO Details

The OAKS PO No. should be a 10 digit number ex. 0000007825

**Not Yet!**

OAKS PO No. 98765432100

OAKS PO Amount (\$) 0.00

OAKS PO Date MM/DD/YYYY HH:MM AM

Date Dispatched MM/DD/YYYY HH:MM AM

Created by Integration Select

Local PO No.

Local PO Amount (\$) 0.00

Local PO Date MM/DD/YYYY HH:MM AM

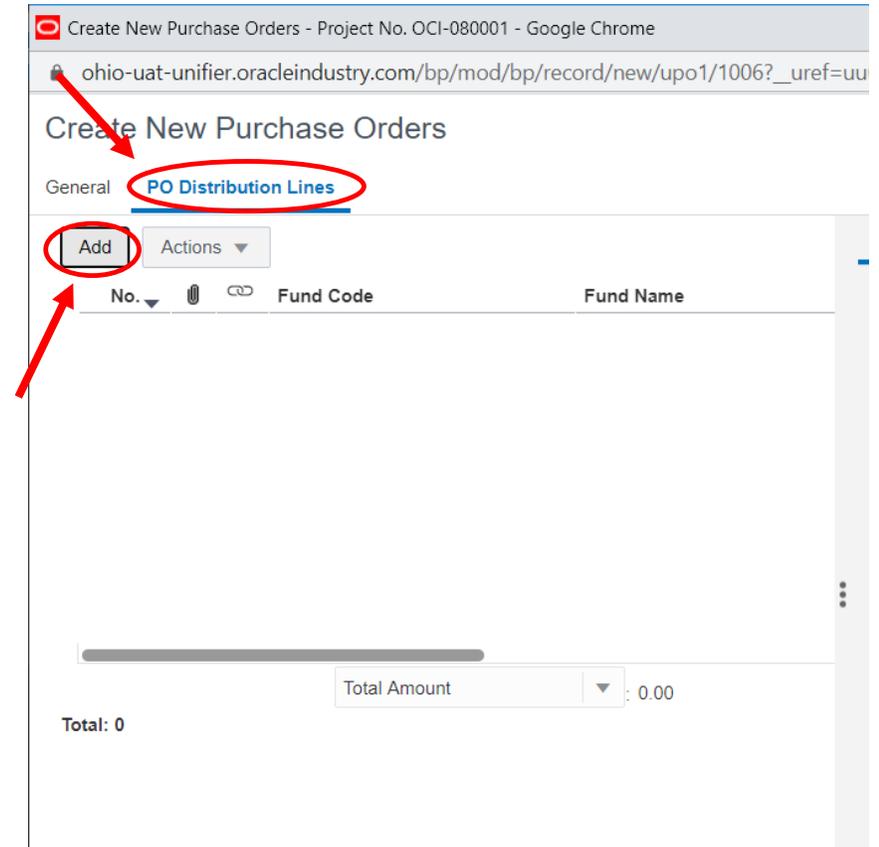
Attachments

Information No Attachments.



# Fund the PO (Owner Financial)

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



# Fund the PO (Owner Financial)

- Click Select
- Choose the appropriate fund code
  - Note: If you do not see any funds to choose from, call OAKS CI
- Enter a Short Description and Dollar Amount
- 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 blue circle 'a' points to the 'Fund Code' dropdown menu. A blue circle 'b' points to the 'Fund Name' field. A blue circle 'c' points to the 'Short Description' and 'Amount (\$)' fields, which are highlighted with a red box. A blue circle 'd' points to the 'Save' button at the bottom of the form.

The screenshot shows the 'Fund Picker' dialog box with a search bar and a table of fund options. A blue circle 'b' points to the 'OCI-Other-TestFund-0-OCI-1' row, which is highlighted in blue. The 'Total: 6' is displayed at the bottom of the table, and 'Cancel' and 'Select' buttons are at the bottom right.

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



# Fund the PO (Owner Financial)

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

The screenshot displays the 'Create New Purchase Orders' interface. The 'PO Distribution Lines' tab is active, showing a table with one line item highlighted in red. The table has columns for 'No.', 'Fund Code', and 'Fund Name'. The line item has '001' as the number, 'OCI-Other-TestFund-0-OCI-1' as the fund code, and 'OCI Test Fund' as the fund name. To the right, the 'Line Item Details' panel is open, showing the following information:

- General**
- 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 table, a 'Total Amount' dropdown shows 'Total: 1' and '200,000.00'. At the bottom right of the details panel, there are 'Cancel', 'Save', and 'Save & Add New' buttons.



# Finish the PO (Owner Financial)

- ▶ a. Go back to the upper form by clicking the General tab
- ▶ b. Type in the dollar amount of your PO that you entered into the Line Item
- ▶ c. The difference should be \$0
- ▶ d. Click **Submit**

The screenshot shows the 'Create New Purchase Orders' form in a web browser. The form is titled 'Create New Purchase Orders' and has a 'General' tab selected. The form contains several input fields and a summary table. Annotations are as follows:

- a**: Points to the 'General' tab.
- b**: Points to the 'OAKS PO Amount (\$)' field, which contains the value '200,000.00'.
- c**: Points to the 'Difference (\$)' field in the summary table, which contains the value '0.00'.
- d**: Points to the 'Submit' button in the top right corner.

Field	Value
OAKS PO No.	98765432100
OAKS PO Date	MM/DD/YYYY HH:MM AM
Date Dispatched	MM/DD/YYYY HH:MM AM
Created by Integration	Select
Local PO No.	
Local PO Date	MM/DD/YYYY HH:MM AM
Date Dispatched	MM/DD/YYYY HH:MM AM
OAKS PO Amount (\$)	200,000.00
Local PO Amount (\$)	0.00
Total Amount (\$)	200,000.00
Line Item Total (\$)	200,000.00
Difference (\$)	0.00



# Subcontractor/Supplier Declarations



# 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
- ▶ The Subcontractor Supplier Declaration BP is also used to submit subcontractors or consultants of professional services providers that contribute to meeting the provider's EDGE participation goal.



# Roles & Responsibilities

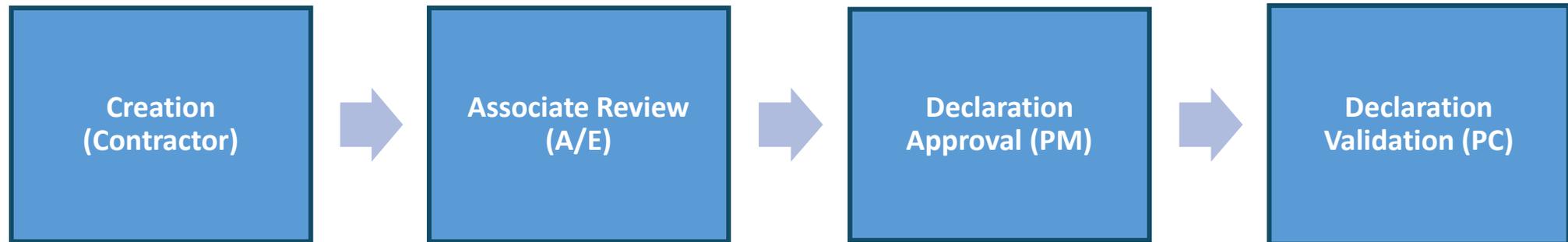
- ▶ Contractor
  - Creates the declaration and submits it for review
  - Provides additional information regarding EDGE participation
  
- ▶ A/E (Associate)
  - ▶ Reviews the initial declaration for compliance with contract documents
  
- ▶ Project Manager (PM)
  - ▶ Reviews the declaration and accepts or rejects use of the subcontractor/supplier
  
- ▶ Project Coordinator
  - ▶ Reviews and validates the declaration for Drug Free Work Place (DFWP) enrollment and EDGE status



# Subcontractor/Supplier Declarations

## Workflow Steps:

*Click the boxes to navigate directly to each section*



# SMSD Initiation (Contractor)

## ▶ Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar shows the user ID "uuu600419530". The page header includes navigation links for "Company Work...", "ACF Fire Protec...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A search bar is located below the header, containing the text "DPS-". A dropdown menu is open below the search bar, displaying a list of projects with columns for "Name", "Number", and "Location". The projects listed include "Ohio State Highway Patrol Post 44", "HP Post 23 LEADS Building", "DPS ACF Standing Seam Roof Renovation", "LEADS Data Center Alum Creek Facility", "OSHP Academy Range Equip. Replacement", "ODPS - EOC Reorganization", "OSHP Academy Maintenance & Repair Project", "OSHP Alum Creek Crime Lab Addition", "Academy HVAC Replacement-Chiller & Range ...", and "Alum Creek HVAC". A red box highlights a "+" sign in the top right corner of the page. Three blue circles with red arrows point to the search bar (labeled 'b'), the search results table (labeled 'c'), and a specific project row (labeled 'c').

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



# SMSD Initiation (Contractor)

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

The screenshot displays the Oracle Primavera Unifier (Test) interface. The top navigation bar includes 'Company Work...', 'OAKS CI Traini...', 'OAKS CI Distric...', and 'OAKS CI'. The left sidebar menu lists various document types, with 'Subcontractor/Supplier Declaration' highlighted in red. A red arrow points to this menu item. The main content area shows the 'Subcontractor/Supplier Declaration' screen with a '+ Create' button circled in red. Below the button is a table with columns for 'Subcontractor/Supplier' and a list of entries including 'aadv', 'ABC', 'ABC Consulting', 'ABC Mechanical', 'ABC Tool Company', 'Acme Supply', 'aec', 'Ben & Jerry', 'Ben & Jerry Acme', 'Ben & Jerry Concrete', 'Ben & Jerry Concrete Co', 'BEN & JERRY CONCRETE CO', 'Ben & Jerry Concrete Co.', 'Ben & Jerry Concrete Co.', 'Ben & Jerry's', 'Ben & Jerry's', 'Ben & Jerry's ACME', 'Ben & Jerry's ACME', and 'Ben & Jerry's Concrete'. The bottom right corner of the screen shows 'Total: 373'.

# 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 Training 1**

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

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

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

**Unifier Login**

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



# PM Declaration Approval

- ▶ Click Accept Task

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214186?task\_id=214186&parent\_id=0&viewOnly=0&project\_id=1006&model=u...

### Subcontractor/Supplier Declaration

Accept Decline

General

#### Task Details

From: Matthew Weber

To: Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Stud...

Sent For: Declaration Approval

#### General

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

Attachments | Comments | Linked Records | Lir >

Information  
No Attachments.



# PM Declaration Approval

- ▶ Review the Subcontractor/Supplier Declaration record

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214186/undefined/undefined?\_uref=uuu745200052t2

### Subcontractor/Supplier Declaration

Send Save

**General**

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

▶ Declaration Information

▶ Additional Details

▶ Publish Path

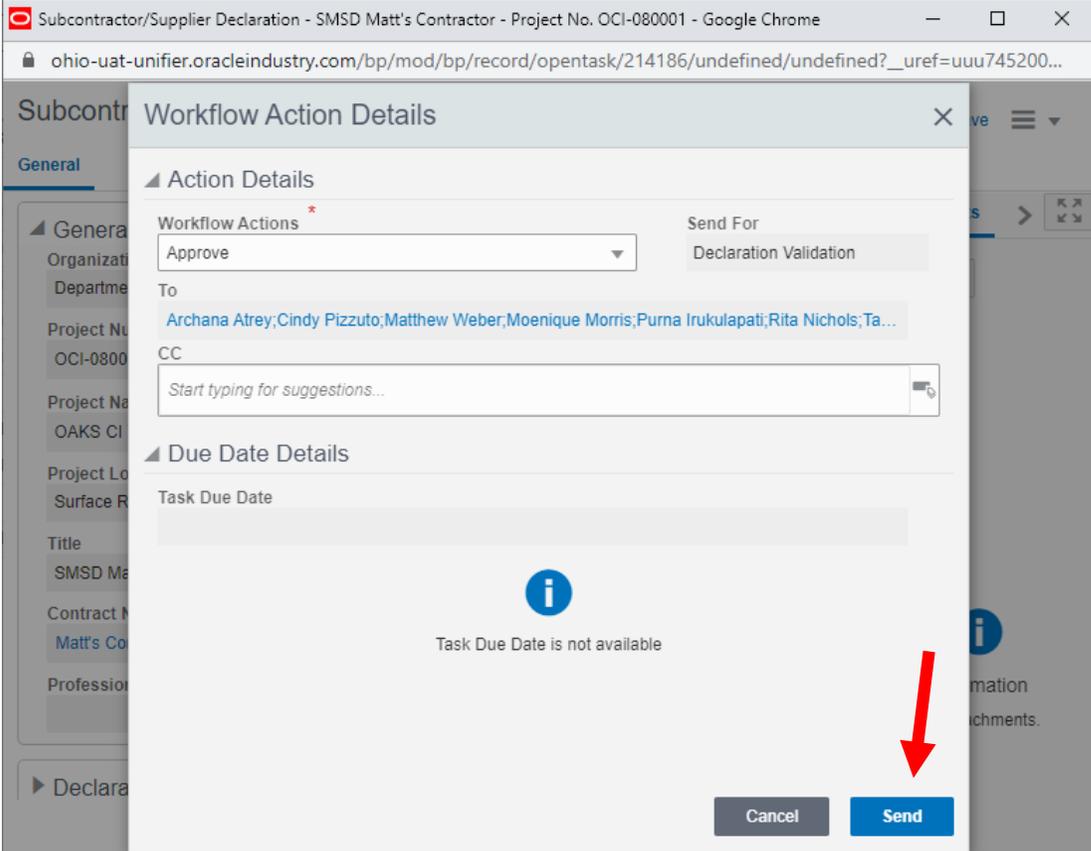
**Attachments** Cor >

No Attachments.



# PM Declaration Approval

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



The screenshot shows a web browser window displaying the 'Workflow Action Details' form for a 'Subcontractor/Supplier Declaration'. The form is titled 'Workflow Action Details' and has a close button (X) in the top right corner. The form is divided into several sections:

- Action Details:**
  - Workflow Actions:** A dropdown menu with 'Approve' selected.
  - Send For:** A button labeled 'Declaration Validation'.
  - To:** A text field containing 'Archana Atrey;Cindy Pizzuto;Matthew Weber;Moenique Morris;Purna Irukulapati;Rita Nichols;Ta...'.
  - CC:** A text field with the placeholder 'Start typing for suggestions...'.
- Due Date Details:**
  - Task Due Date:** A text field that is currently empty.
  - Message:** A blue information icon (i) above the text 'Task Due Date is not available'.
- Buttons:** At the bottom right, there are two buttons: 'Cancel' (grey) and 'Send' (blue). A red arrow points to the 'Send' button.



# PC Validation Step

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

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

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

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

From : Shauna Hooks  
Sent For : PC Review and Validation

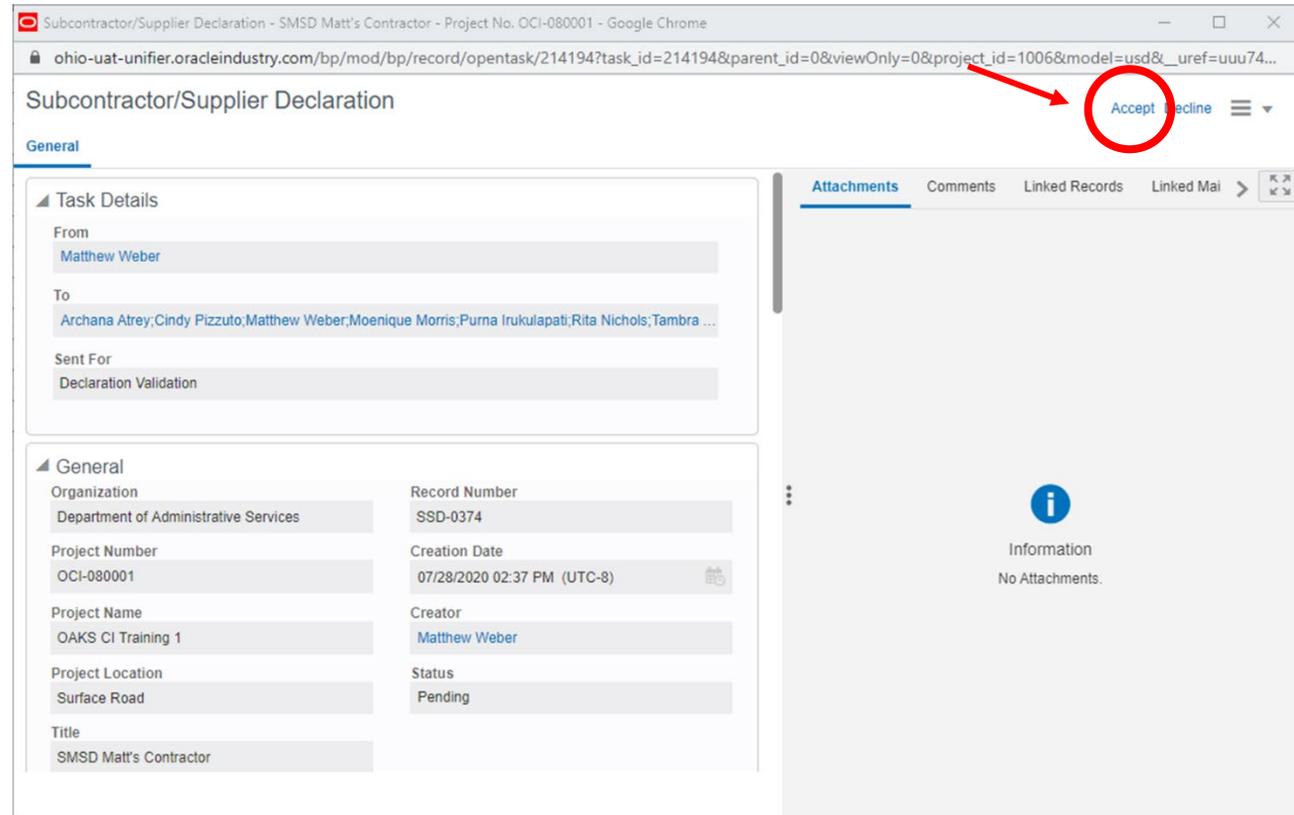
Source Name : Agency General Projects Test  
Record No : Contractor Pay Request CPR-0029  
Title : testshauna

[Unifier Login](#)



# PC Validation Step

- ▶ Click Accept Task



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

- Browser Tab:** Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome
- URL:** ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194?task\_id=214194&parent\_id=0&viewOnly=0&project\_id=1006&model=usd&\_\_uref=uuu74...
- Page Title:** Subcontractor/Supplier Declaration
- Buttons:** Accept, Decline, and a menu icon. The 'Accept' button is circled in red, and a red arrow points to it from the left.
- General Section:**
  - Task Details:**
    - From: Matthew Weber
    - To: Archana Atrey; Cindy Pizzuto; Matthew Weber; Moenique Morris; Purna Irukulapati; Rita Nichols; Tamba ...
    - Sent For: Declaration Validation
  - General:**

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



# PC Validation Step

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

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

- Browser: Google Chrome
- Page Title: Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001
- URL: ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_\_uref=uuu745200052t2
- Page Content: Subcontractor/Supplier Declaration form.
- Form Fields:
  - General: Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.
  - Declaration Information:
    - Type: Material Supplier
    - Subcontractor/Supplier: Matt's Consultant
    - Federal Tax ID: 1234567890
    - Primary Officer 1: Matt's Officer
    - Address Line 1: 30 W Spring St
  - Tier 1: Yes (highlighted with a red box)
  - Subcontracted by: (empty field)
- Attachments: Tab highlighted with a red circle and an arrow pointing to it.
- Information: No Attachments.



# PC Validation Step

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

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

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

### Subcontractor/Supplier Declaration

Send Save

General

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

Attachments

General

Declaration Information

Type	Tier 1
Material Supplier	Yes
Subcontractor/Supplier	Subcontracted by:
Matt's Consultant	
<b>Federal Tax ID</b>	
1234567890	
Primary Officer	
Matt's Officer	
Address Line 1	
30 W Spring St	

Information  
No Attachments.

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

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

### Subcontractor/Supplier Declaration

Send Save

General

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

Attachments

General

Declaration Information

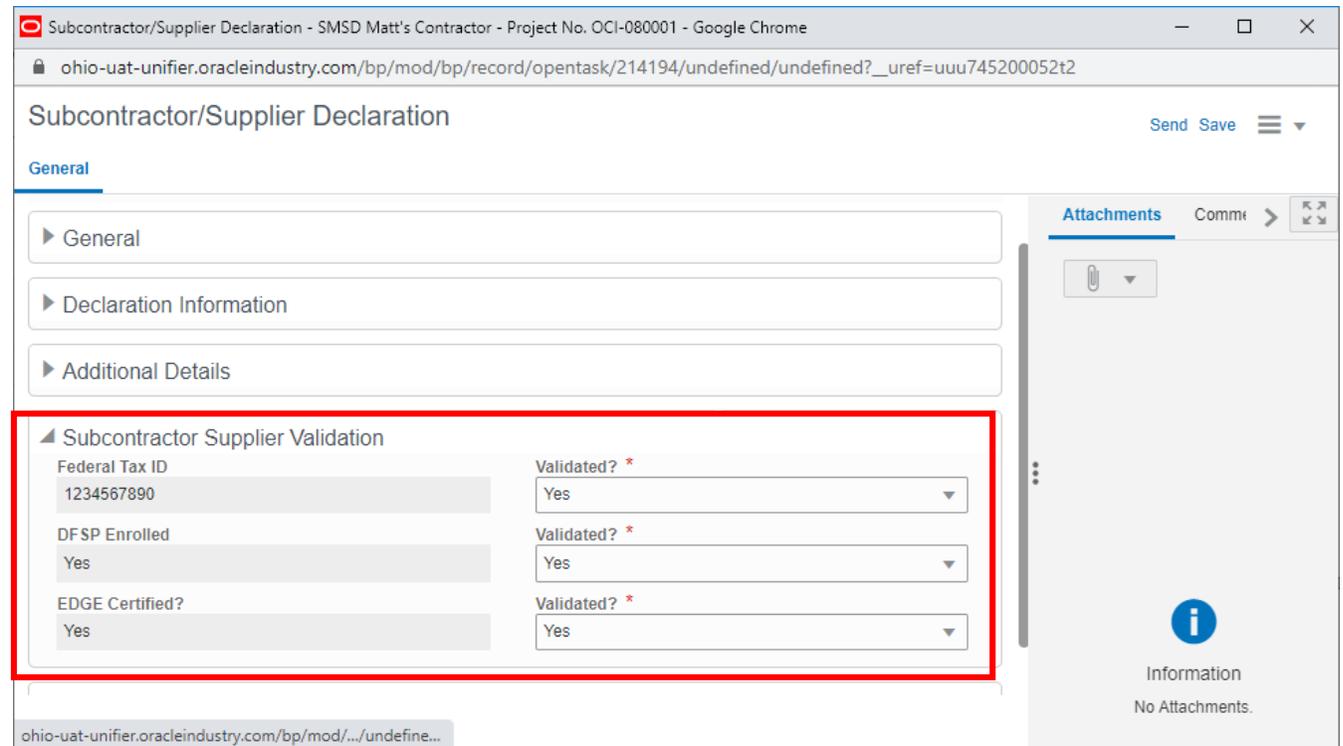
**Additional Details**

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

Information  
No Attachments.

# PC Validation Step

- ▶ Fill out Subcontractor Supplier Validation required fields



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

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

### Subcontractor/Supplier Declaration

Send Save

General

▶ General

▶ Declaration Information

▶ Additional Details

▶ Subcontractor Supplier Validation

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

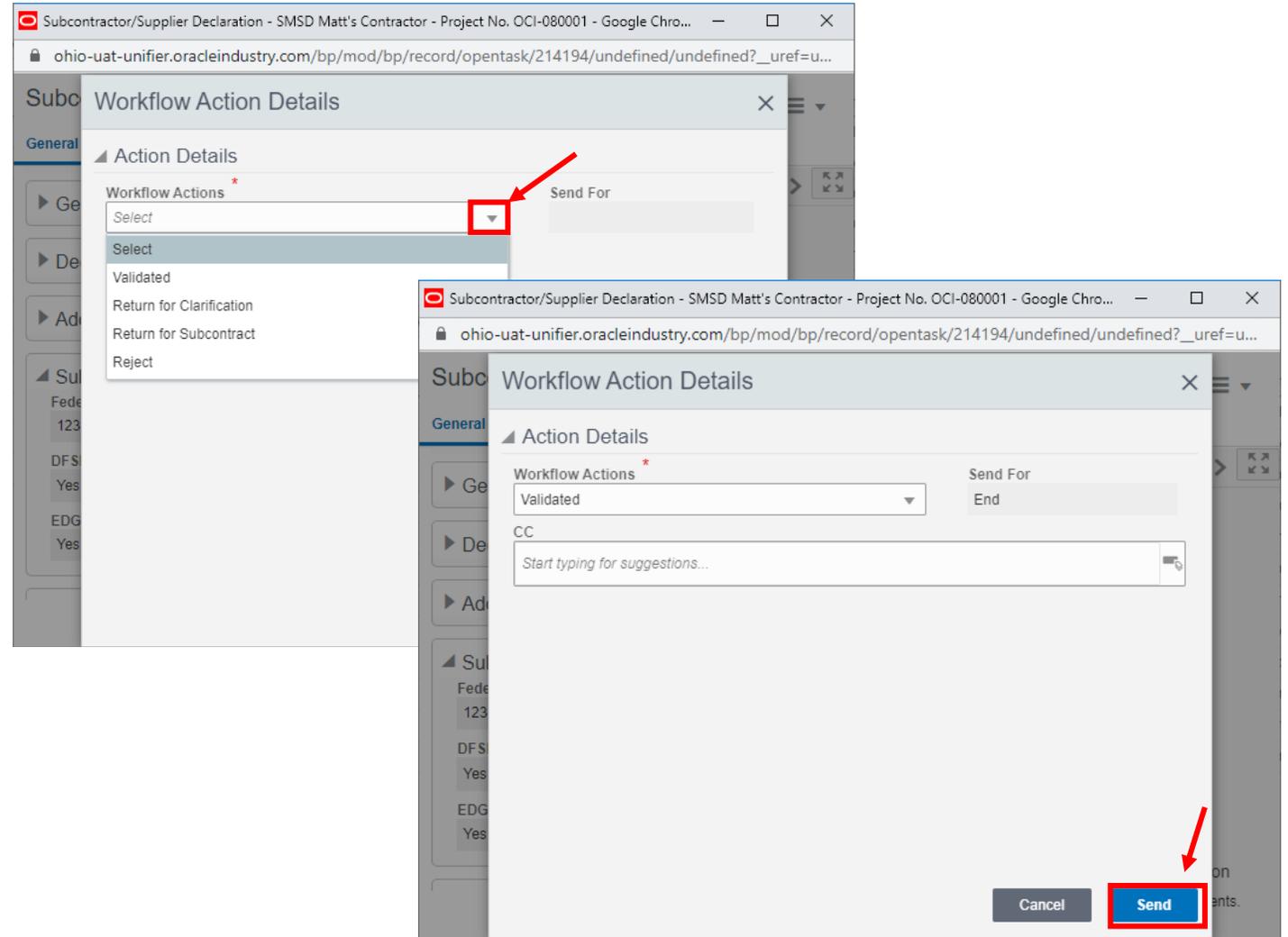
Attachments

Information  
No Attachments.



# PC Validation Step

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



# Validation Links

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



# Contract Schedule of Values (SOV)



# Purpose & Procedure

- ▶ Provides for the submission, review, and approval of the Contractor's Schedule of Values.
- ▶ The Submitted and approved SOV becomes the basis for all future Contractor Pay Requests.



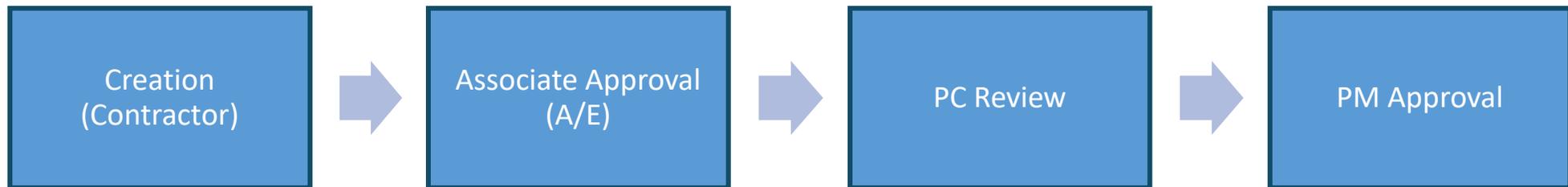
# Roles & Responsibilities

- ▶ Contractor
  - Creates the Schedule of Values (SOV)
  - Identifies work items that are provided by Subcontractors and Material Suppliers
  - Negotiates details of the SOV with the Associate (A/E)
  
- ▶ Associate (A/E)
  - ▶ Reviews the SOV submission
  - ▶ Negotiates details of the SOV with the Contractor
  - ▶ Recommends Approval
  
- ▶ Project Manager (PM)
  - ▶ Reviews the SOV record
  - ▶ Requests clarifications and updates
  - ▶ Approves the SOV record
  
- ▶ Project Coordinator
  - ▶ Reviews the SOV record
  - ▶ Determines that EDGE participation is accurate



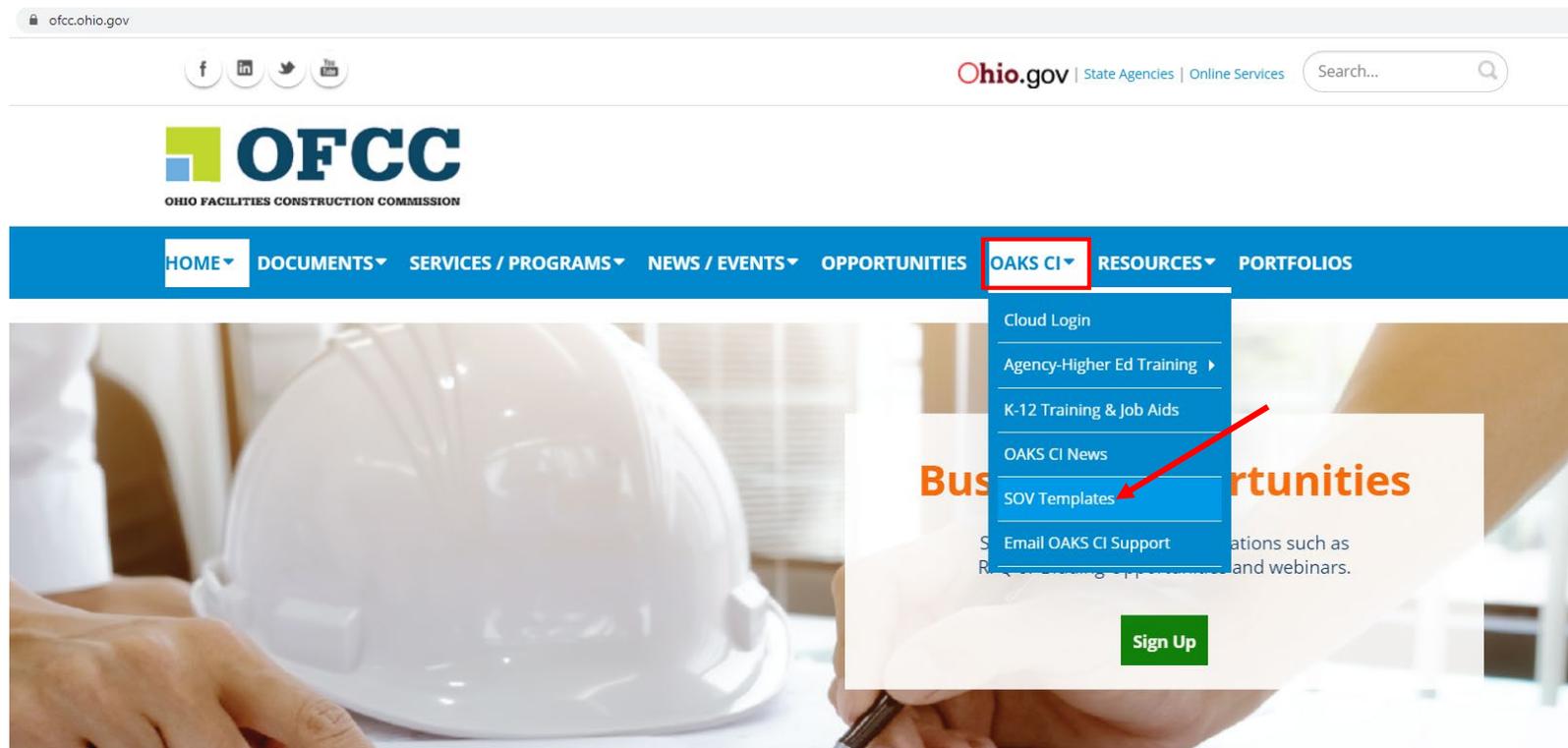
# Contract Schedule of Values (SOV)

- ▶ Workflow Steps



# Locate the Spreadsheet (Contractor)

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



# Locate the Spreadsheet (Contractor)

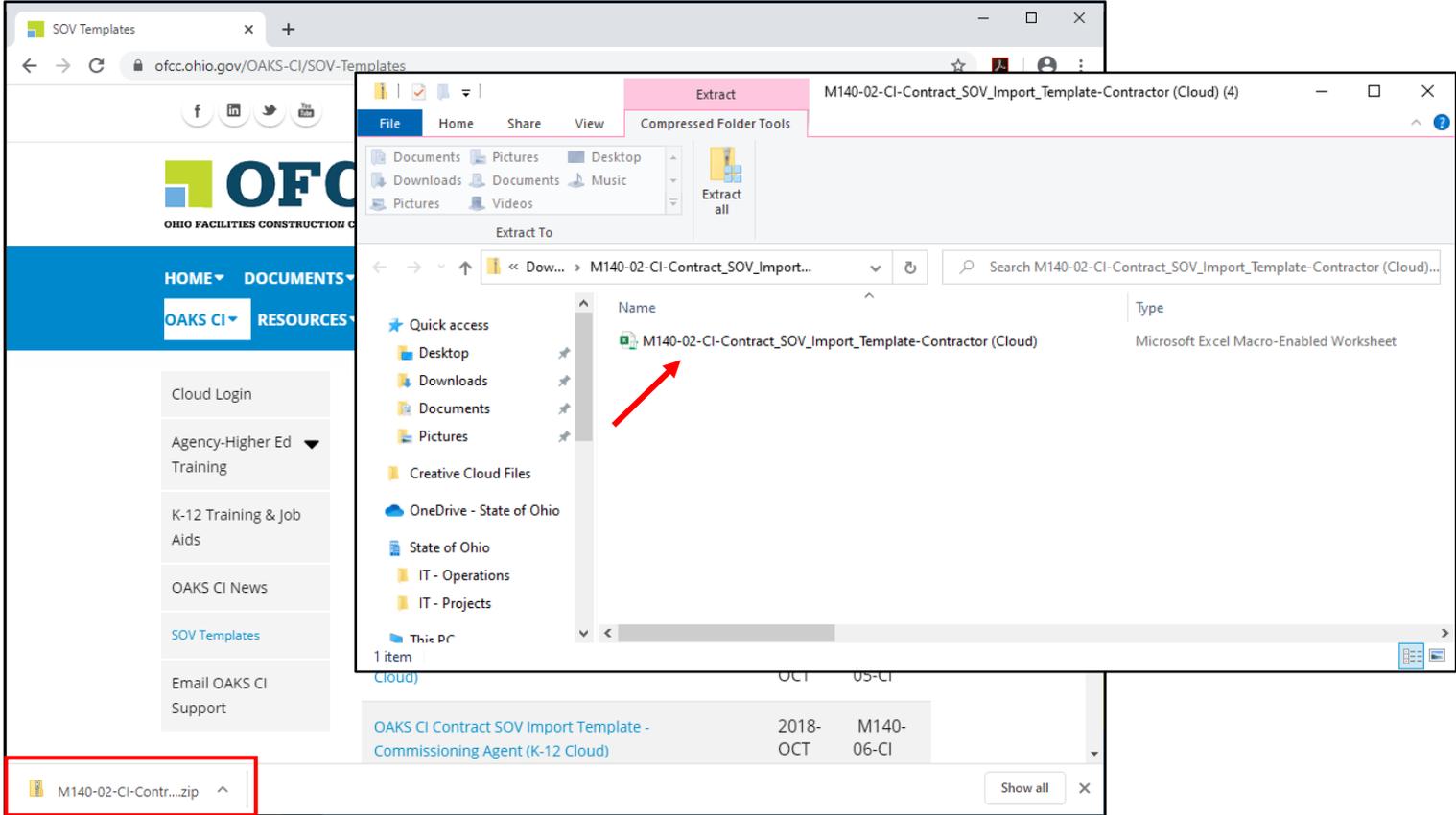
- ▶ Click - “OAKS CI Contract SOV Import Template – Contractor”

The screenshot shows the OFCC website with a navigation menu and a list of SOV Templates. The 'OAKS CI' menu item is selected. The 'SOV Templates' section contains a table of documents. The first row is highlighted with a red box.

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

# Open the Spreadsheet (Contractor)

- ▶ Step 2: Open downloaded Excel spreadsheet



# Enter Contract SOV Line Items (Contractor)

## ▶ Step 3:

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

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

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

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
CE-00-00	Construction Execution Summary				
CE-01-00	General Requirements				
CE-01-IN	CE Insurance				
CE-01-SB	CE Surety Bonds				
CE-01-SC	CE Scheduling Services				
CE-01-PF	CE Partnering Facilitation				
CE-01-MBL	CE Mobilization Labor	Mobilization Labor (EDGE)	\$8,000.00	Mac's Mobiles	
CE-01-MBM	CE Mobilization Matl				
CE-01-TFL	CE Temporary Facilities Labor				
CE-01-TFM	CE Temporary Facilities Matl				
CE-01-LCL	CE Lead Contractor Services Labor				
CE-01-LCM	CE Lead Contractor Services Matl				
CE-01-CLL	CE Closeout Labor				
CE-01-CLM	CE Closeout Matl				
CE-01-OTL	CE General Conditions Labor				
CE-01-OTM	CE General Conditions Matl				
CE-FC-00	Facility Construction				
CE-FC-02L	Existing Conditions Labor				
CE-FC-02M	Existing Conditions Matl				
CE-FC-03L	Concrete Labor	Concrete Labor	\$5,000.00	Joe's Concrete	
CE-FC-03M	Concrete Matl				

# Adding Additional Lines (Contractor)

- ▶ Step 4: If necessary, add additional lines to the SOV spreadsheet

- ▶ Left click on the number of the line to highlight it
- ▶ Right click and choose copy



The screenshot shows an Excel spreadsheet with the following data:

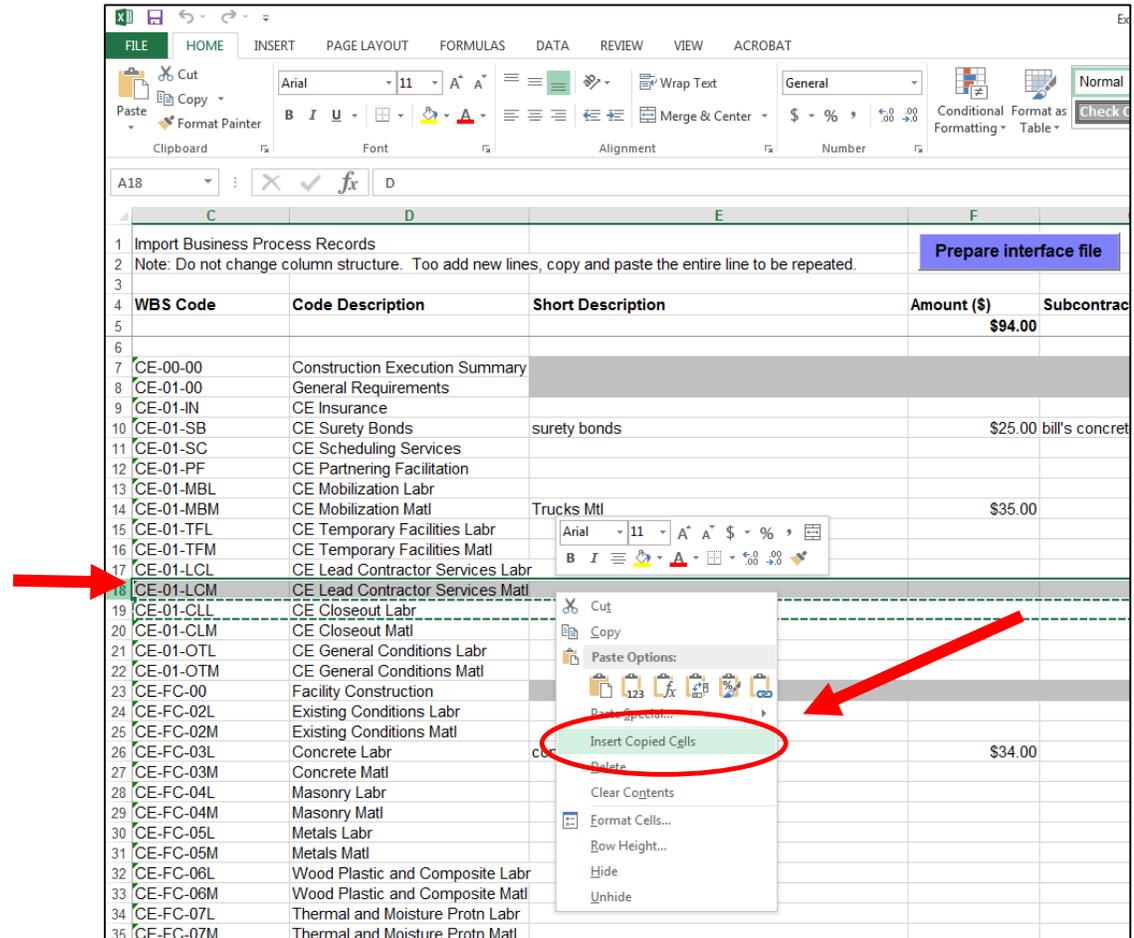
WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
			\$94.00		
CE-00-00	Construction Execution Summary				
CE-01-00	General Requirements				
CE-01-IN	CE Insurance				
CE-01-SB	CE Surety Bonds	surety bonds	\$25.00	bill's concrete	
CE-01-SC	CE Scheduling Services				
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 (Contractor)

- ▶ Step 4 (cont.):

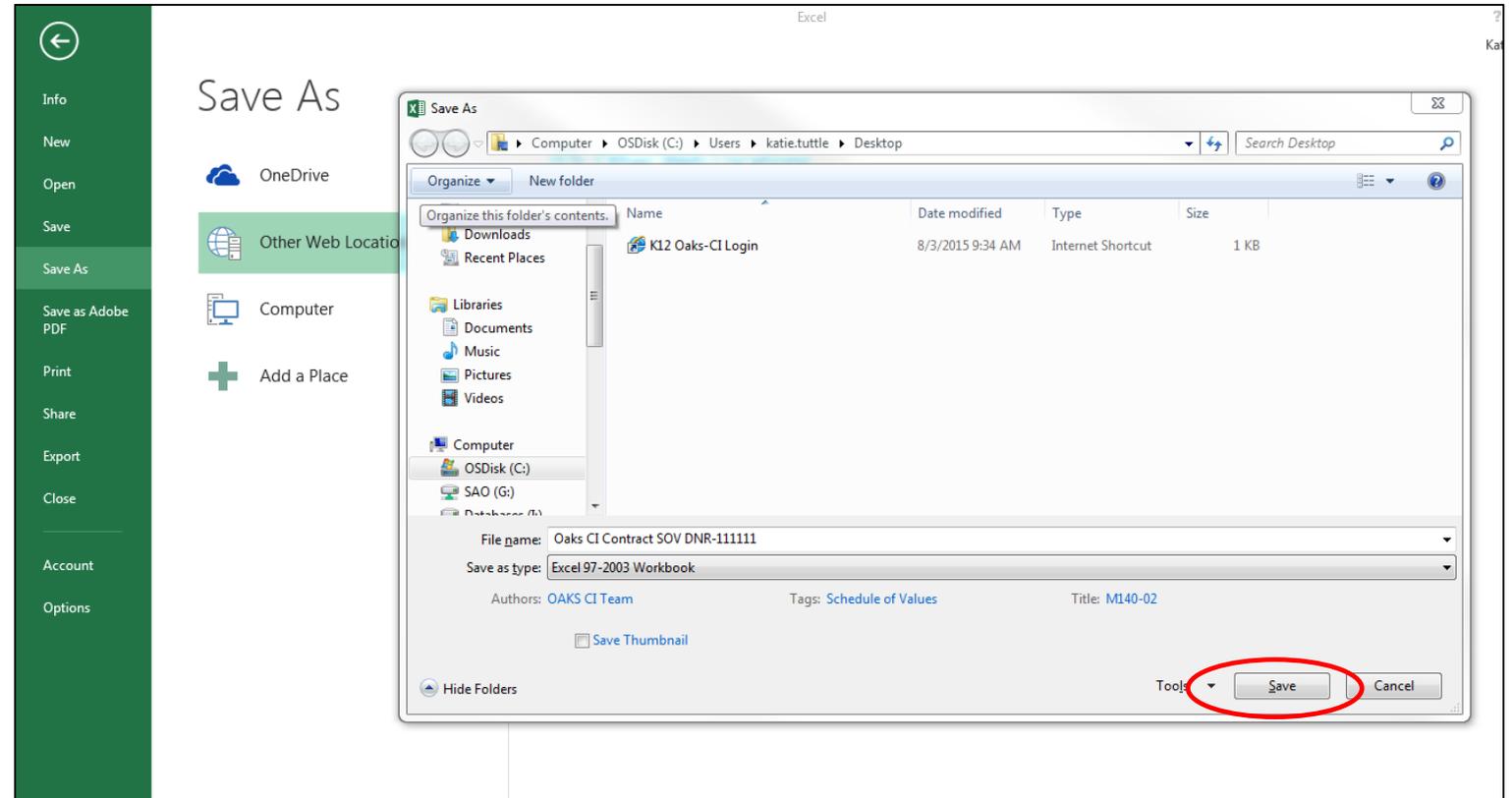
- ▶ Right click on the line you want to be **below** the line you are inserting
- ▶ Choose insert copied cells
- ▶ Your line will show up above the selected line. You can edit the text in the line as necessary



# Save the Spreadsheet (Contractor)

## ▶ Step 5:

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

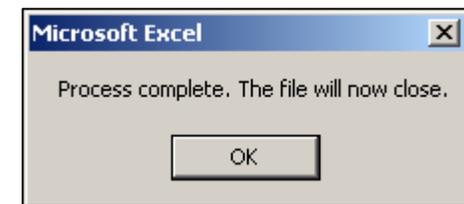


# Prepare Spreadsheet (Contractor)

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

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

This box will appear indicating the file preparation is complete.



# Create New Contract SOV Record (Contractor)

- Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows the OAKS CI web application interface. At the top right, there is a search bar containing the text "DPS-". Below the search bar, a table displays a list of project records. The table has three columns: "Name", "Number", and "Location". The records listed are:

Name	Number	Location
Ohio State Highway Patrol Post 44	DPS:060001	/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".



# Create New Contract SOV Record (Contractor)

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

The screenshot shows the Oracle Primavera Unifier (Test) interface. The navigation menu on the left is expanded to show the 'Logs' section, with 'Subcontractor/Supplier Declaration' highlighted. A red arrow points to this menu item. In the main content area, the 'Subcontractor/Supplier Declaration' table is visible. The '+ Create' button is circled in red, and the minus sign icon in the navigation menu is also circled in red. The table contains a list of subcontractors and suppliers, including 'Tom and Jerrys ACME', 'aacv', 'ABC', 'ABC Consulting', 'ABC Mechanical', 'ABC Tool Company', 'Acme Supply', 'aec', 'Ben & Jerry', 'Ben & Jerry Acme', 'Ben & Jerry Concrete', 'Ben & Jerry Concrete Co', 'BEN & JERRY CONCRETE', 'Ben & Jerry Concrete Co.', 'Ben & Jerry Concrete Co.', 'Ben & Jerry's', 'Ben & Jerry's', 'Ben & Jerry's ACME', and 'Ben & Jerry's ACME'. The total number of records is 374.

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

# Enter Information Into the Record (Contractor)

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

The screenshot shows a web browser window with the URL `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucsov/1006/253?_uref=uuu745200052t2`. The page title is "Create New Contract Schedule of Values". The "General" tab is selected and circled in red. The form is divided into two main sections: "General" and "Contract Information".

**General Section:**

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

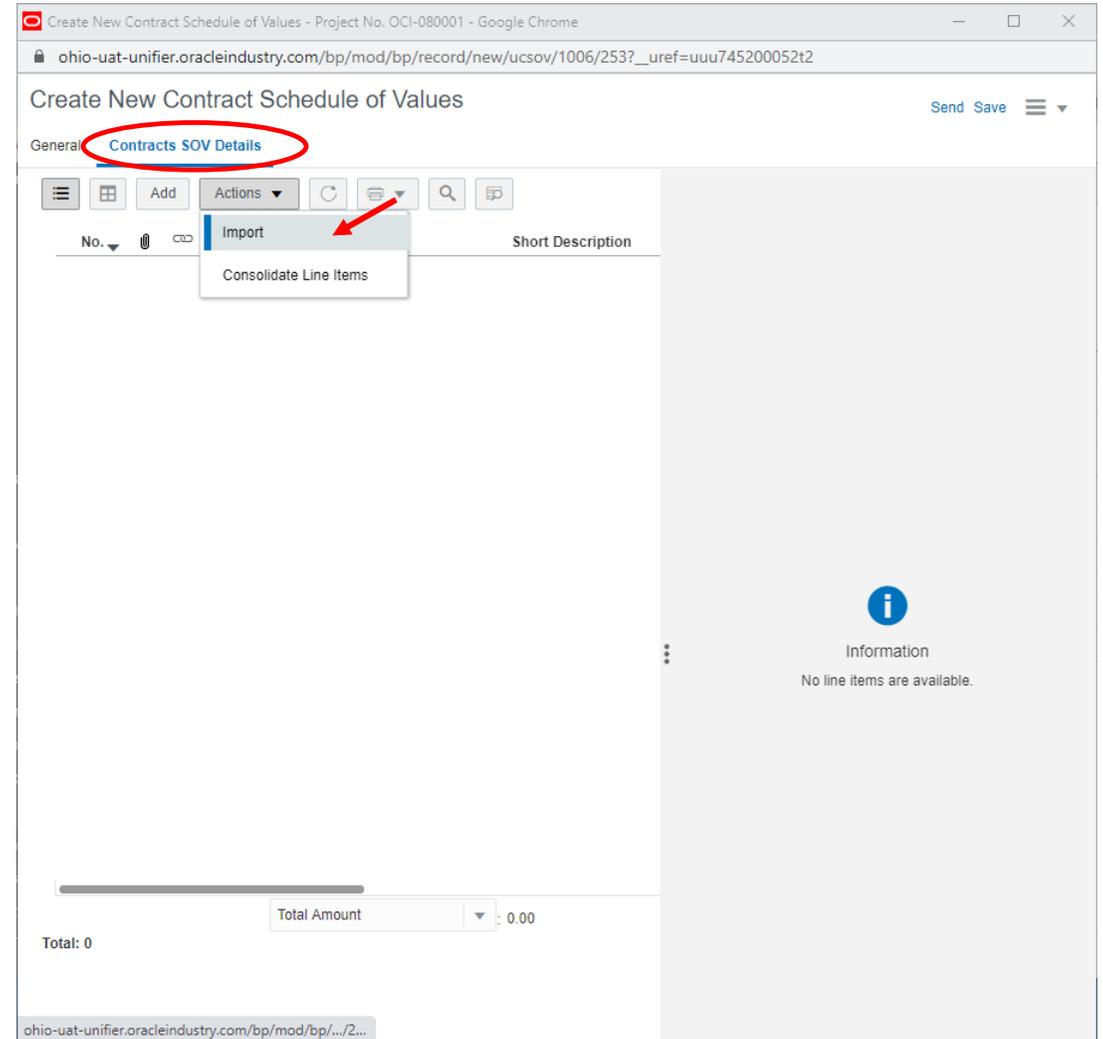
**Contract Information Section:**

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

There is also a "Notes" section at the bottom of the form.

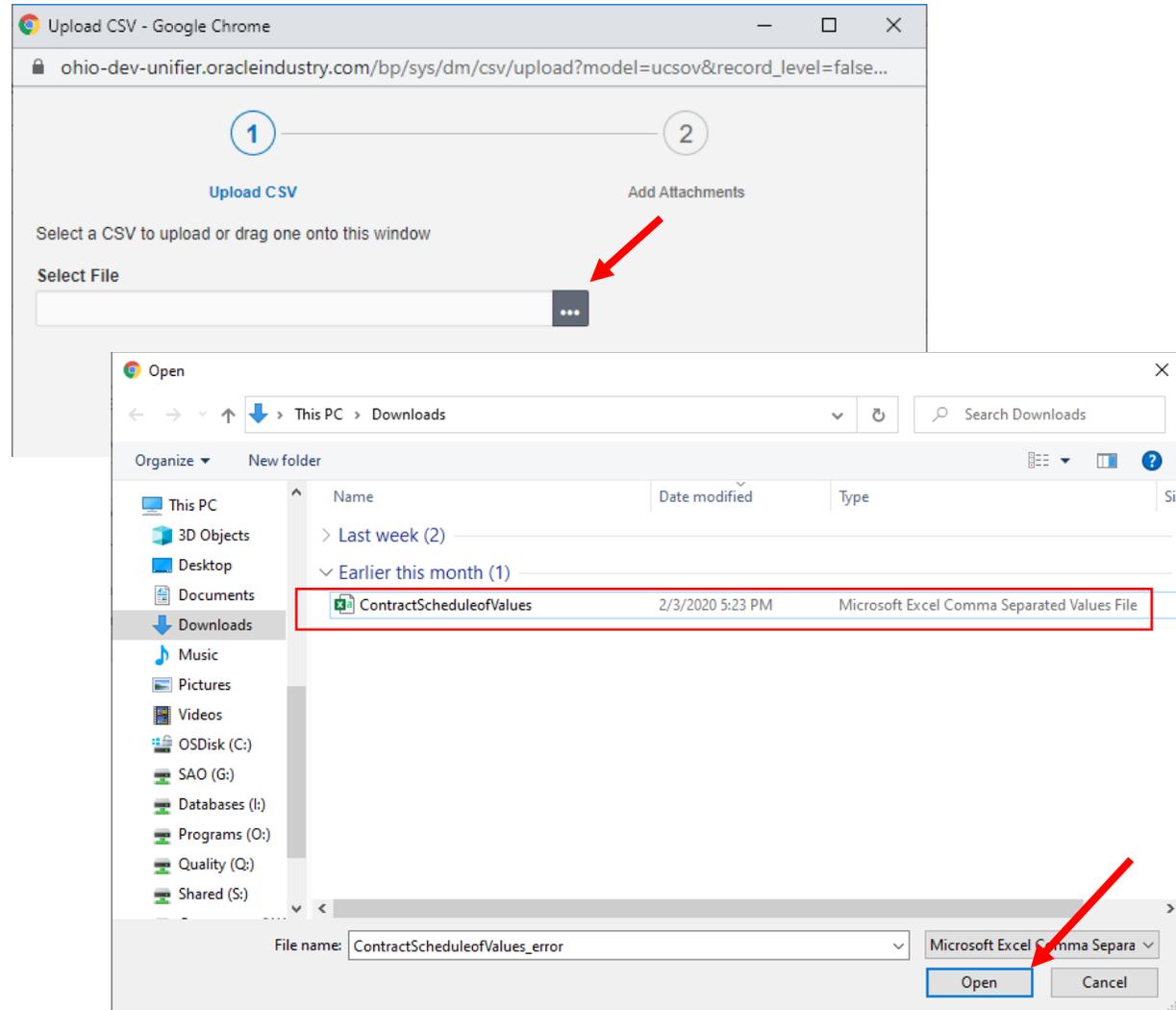
# Import Spreadsheet (Contractor)

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



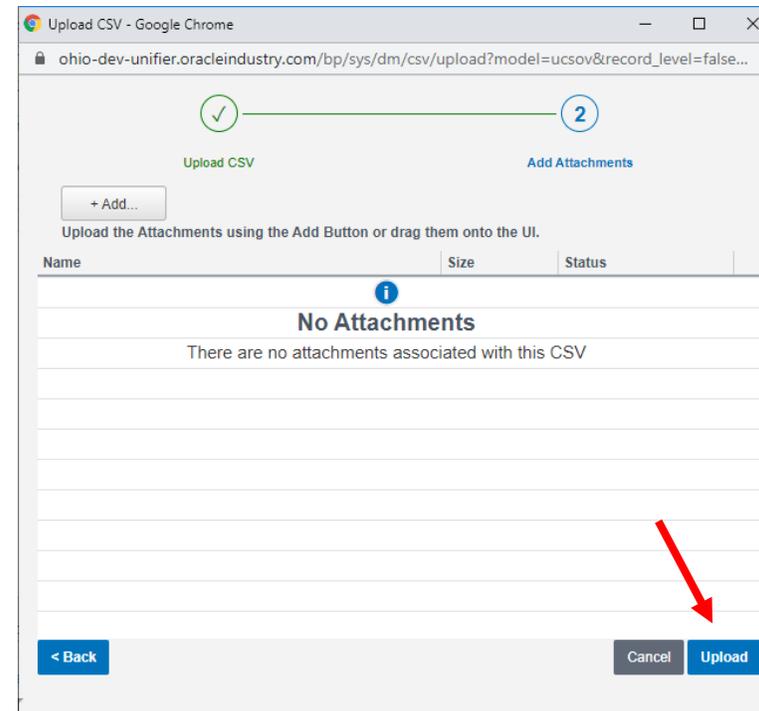
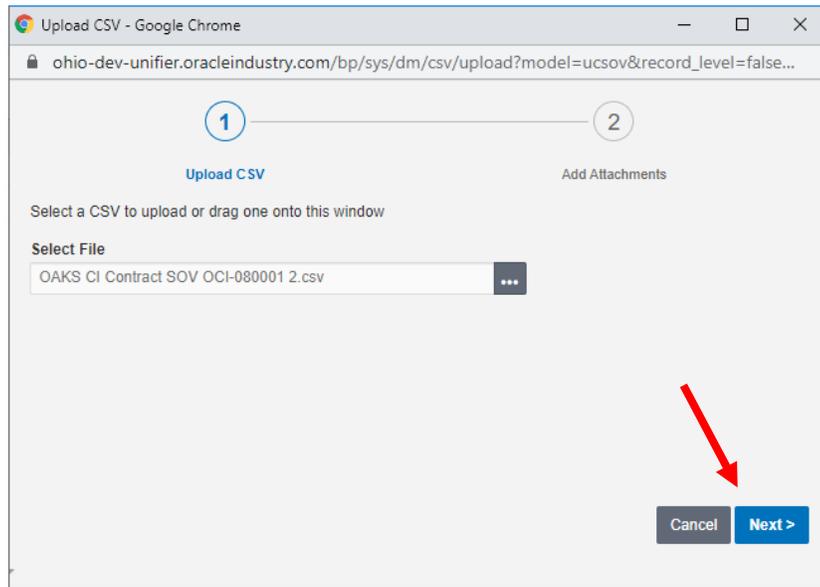
# Import Spreadsheet (Contractor)

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



# Import Spreadsheet (Contractor)

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



# Review Imported Line Items (Contractor)

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

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

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

Total: 5  
Total Amount: 350,000.00

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

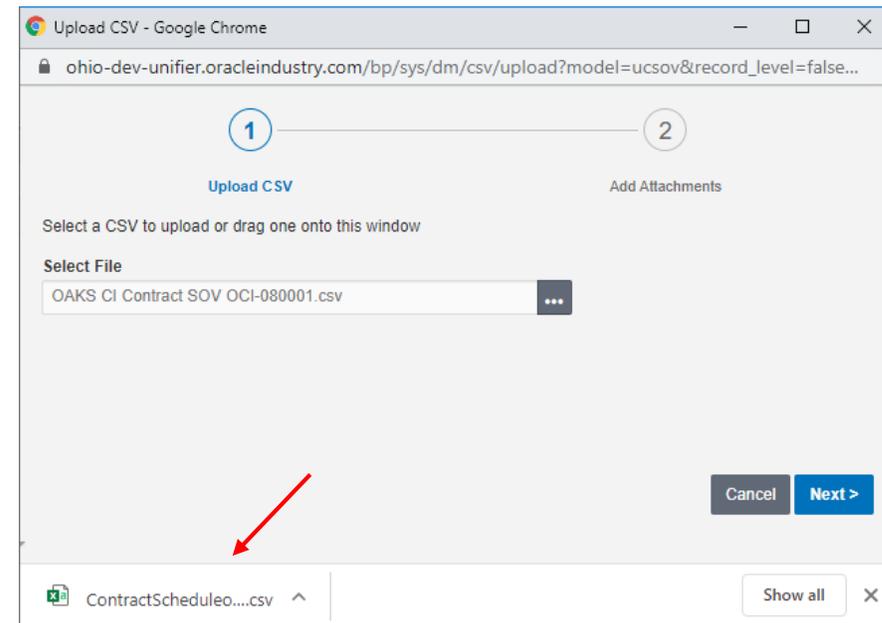
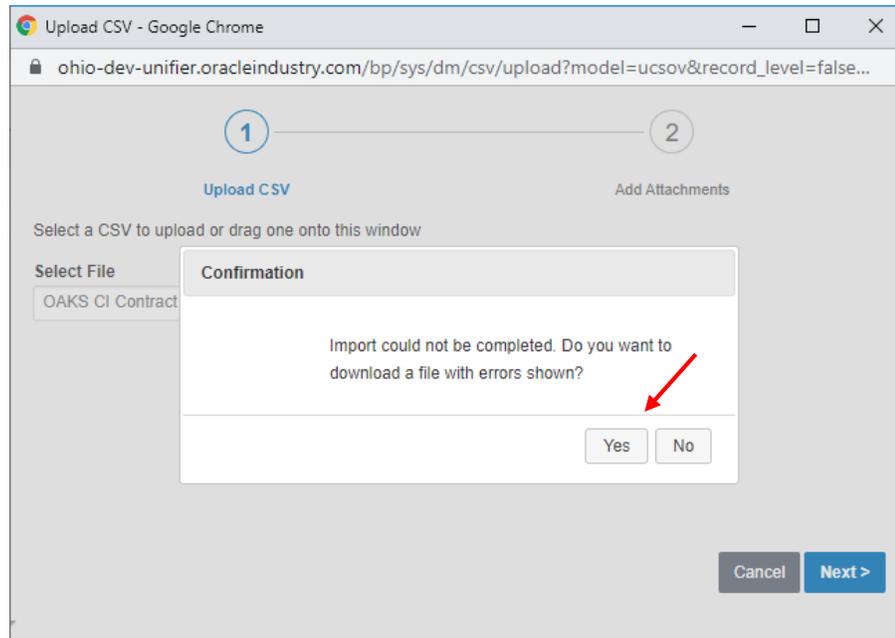
# Complete Contract SOV (Contractor)

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

The image displays two screenshots from a web browser showing the 'Create New Contract Schedule of Values' process. The top screenshot shows the 'Send' button highlighted with a red box and an arrow. The bottom screenshot shows the 'Workflow Action Details' dialog with 'Submit' selected in the 'Workflow Actions' dropdown, and the 'Send' button highlighted with a red arrow.

# SOV Import Error (Contractor)

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



# SOV Import Error (Contractor)

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

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

# SOV Import Error (Contractor)

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

The screenshot shows an Excel spreadsheet with the following data:

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

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

# SOV Import Error (Contractor)

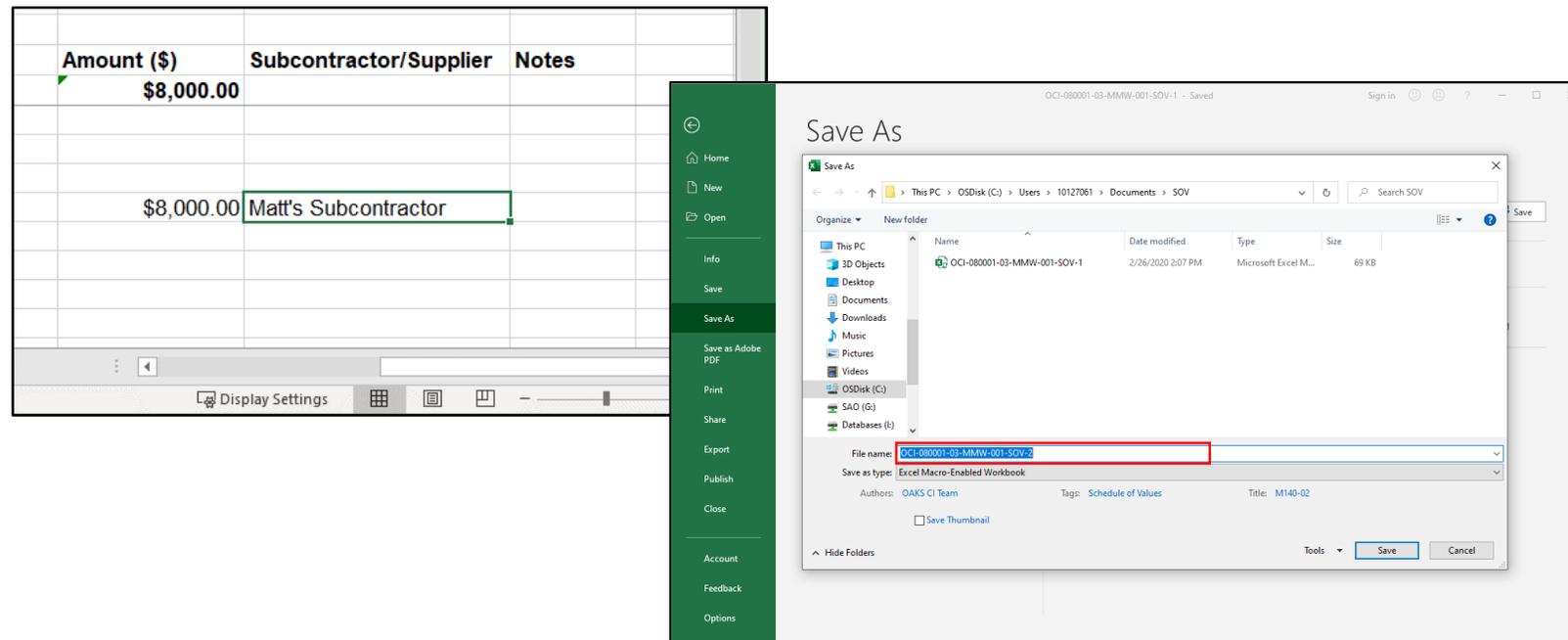
- ▶ Find the Subcontractor/Supplier name in OAKS CI
  - ▶ Navigate to: Logs -> Subcontractor/Supplier Declaration
- ▶ Find the record that had an error
- ▶ Take note of the exact spelling of the Subcontractor/Supplier name

The screenshot displays the Oracle Primavera Unifier (Development) interface. On the left, a navigation menu is shown with 'Logs' highlighted in red. A red arrow points from 'Logs' to the 'Subcontractor/Supplier Declaration' option in the main menu. The main menu lists various document types, with 'Subcontractor/Supplier Declaration' highlighted in red. On the right, a table titled 'Subcontractor/Supplier Declaration' is displayed, showing a list of records with columns for 'Subcontractor/Supplier' and 'Type'. The table contains 14 rows of data, including entries like 'Matt's Subcontractor 2', 'MBA Electric', 'Melissa B.', 'Michael S.', 'Mickey Mouse Concrete', 'Mike And Sue', 'Mike's Mud supply', 'MJS Engineering', 'My Friend', 'Nelson Stark Company', and several instances of 'oaks plumbing' and 'Oaks Plumbing'. The total number of records is indicated as 373.

Subcontractor/Supplier	Type
Matt's Subcontractor 2	Subcontractor
MBA Electric	Subcontractor
Melissa B.	Subcontractor
Michael S	Subcontractor
Mickey Mouse Concrete	Subcontractor
Mike And Sue	Material Supplier
Mike's Mud supply	Material Supplier
MJS Engineering	Consultant
My Friend	Material Supplier
Nelson Stark Company	Subcontractor
oaks plumbig	Material Supplier
Oaks Plumbing	Material Supplier

# SOV Import Error (Contractor)

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

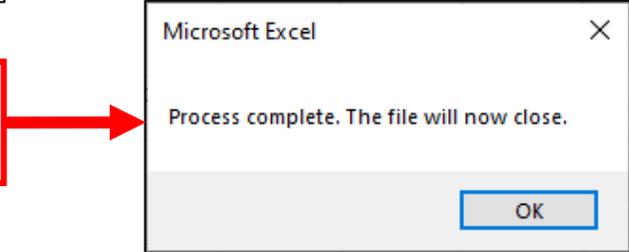


# SOV Import Error (Contractor)

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

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

This box will appear indicating the file preparation is complete.



# Associate Approval Step

- ▶ Associate

- ▶ Reviews the record and performs one of the following Workflow Actions:

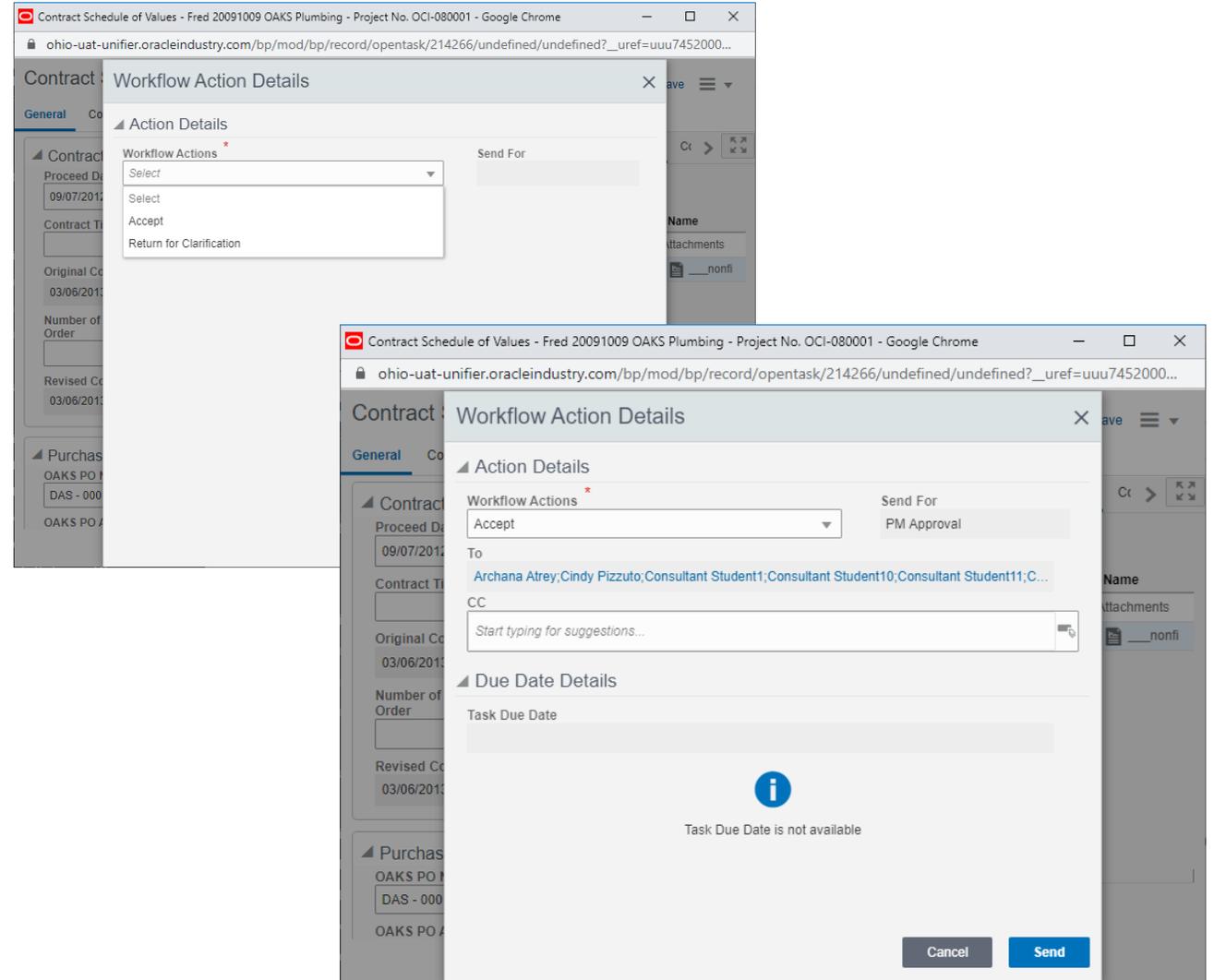
- ▶ **Recommend Approval:** Approves the SOV submittal from the Contractor

- ▶ **Return for Clarification:** Returns the SOV to the Contractor for revisions or corrections



# PC Review Step

- ▶ Project Coordinator
  - ▶ Performs one of the following Workflow Actions:
    - ▶ **Accept:** Forwards the SOV to the PM for Approval
    - ▶ **Return for Clarification:** Returns the SOV to the Contractor for revisions



# PM Approval Step

- ▶ Project Manager

- ▶ Performs one of the following Workflow Actions:

- ▶ **Approve:** Approves the record

- ▶ **Return for Clarification:** Returns the record for clarification, the submittal review and approval process is repeated

- ▶ **Once PM approves SOV, the PC will approve the Contract record**



# SOV Approval Completion (PC)

- ▶ Upon SOV final approval, the Contract Record will be opened by the Project Coordinator and moved to the End step
- ▶ Once the SOV is Approved, pay requests can be created.



# Prevailing Wage Report (Contractor)



# Purpose & Procedure

- ▶ A Prevailing Wage Report is mandatory before submitting a pay request
- ▶ Create the Prevailing Wage Report for each Pay Request to be submitted



# Prevailing Wage Report Creation (Contractor)

- Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar contains "uuu600419530". The page displays a search bar with "DPS-" entered. Below the search bar is a 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: A red box labeled 'a' highlights a plus sign in the top right corner of the application. A blue circle labeled 'b' points to the search bar. A blue circle labeled 'c' points to the first row of the table.



# Prevailing Wage Report Creation (Contractor)

- ▶ In OAKS CI navigate to:
  - ▶ Logs -> Prevailing Wage Report
  - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a list of menu items, with 'Logs' circled in red. A red arrow points from the 'Logs' menu item to the 'Prevailing Wage Report' item at the bottom of the list. The main content area displays the 'Prevailing Wage Report' page, with a '+ Create' button circled in red. Below the button is a table with columns 'Contract SOV Name' and 'Contract'. The table contains 15 rows of data, including entries like 'SSSSSOV', 'Schedule of Values', 'Morris Test 2', 'Morris Test', 'Wednesday's Training', and 'test'. At the bottom right of the table, it says 'Total: 96'.

Contract SOV Name	Contract
SSSSSOV	R. W. Set
Schedule of Values	R. W. Set
Morris Test 2	R. W. Set
Morris Test 2	R. W. Set
Morris Test	Harrison
Morris Test 2	R. W. Set
Wednesday's Training	R. W. Set
Morris Test	Harrison
Morris Test	Harrison
Wednesday's Training	R. W. Set
Wednesday's Training	R. W. Set
Wednesday's Training	R. W. Set
test	R. W. Set
Schedule of Values	R. W. Set
Wednesday's Training	R. W. Set
Schedule of Values	R. W. Set
Wednesday's Training	R. W. Set
Wednesday's Training	R. W. Set
Schedule of Values	R. W. Set
Wednesday's Training	R. W. Set



# Prevailing Wage Report (Contractor)

- ▶ Enter Information in the Upper Form (General Tab)
- ▶ Complete required fields \*
  - ▶ **Status:**
    - ▶ Pending: When still updating
    - ▶ Complete: Only when record is final
  - ▶ **Contract Name**
  - ▶ **Pay Request Period Start**
  - ▶ **Pay Request Period End**
- ▶ **Note:** Check the confirmed box if the work for this report is done by the Prime Contractor

Create New Prevailing Wage Report - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upwr/1006?\_\_uref=uuu818388450t2

### Create New Prevailing Wage Report

Submit Save

**General** Subcontractor Details

Attach all certified payrolls to this record. Records in 'Pending' status may be reopened and updated as needed. Records in 'Complete' status may be referenced by a Contractor Pay Request but may no longer be edited.

**General**

Organization Department of Administrative Services	Record Number
Project Number OCI-080001	Creation Date
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Location Surface Road	Status * Pending
Contract Name * Fred 20091009 OAKS Plumbing	Contractor Name 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)

▶ Prime Contractor Payroll Report



# Prevailing Wage Report (Contractor)

- ▶ **Note:** Check the confirmed box if the work for this report is done by the Prime Contractor

Create New Prevailing Wage Report

Submit Save

General Subcontractor Details

Prime Contractor Payroll Report

Worked This Period? Yes

Payroll submitted? Yes

Prime Payroll Period Start 02/01/2020 05:00 PM (UTC-8)

Prime Payroll Period End 02/29/2020 05:00 PM (UTC-8)

Payrolls Transmitted via

Apprentice Agreement Submitted Date 02/20/2020 05:00 PM (UTC-8)

Payroll Scheduled Submission

Check box as confirmation that all work is performed by PRIME.

Confirmed

Attachments

Information  
No Attachments.



# Prevailing Wage Report (Contractor)

- ▶ If there are subcontractors, you must add their information
- ▶ Click to open the **Subcontractor Details** tab
- ▶ Click the **Select** button next to **Subcontractor Name**
- ▶ Choose the Subcontractor from the list
- ▶ Click **Save**

Create New Prevailing Wage Report - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upwr/1006?\_uref=uuu818388450t2

Create New Prevailing Wage Report

General **Subcontractor Details**

Add Actions

No.	Subcontractor Name	Utilized This Perio...	Payroll sub...	Su Pa Pe
Total: 0				

Line Item Details

Subcontractor Name \*  
Type a Subcontractor/Supplier... ▼

Utilized This Period?  
Select

Payroll submitted?  
Select

Subcontractor Payroll Period Start  
MM/DD/YYYY HH:MM AM

Subcontractor Payroll Period End  
MM/DD/YYYY HH:MM AM

Short Description \*

Notes

Cancel Save Save & Add New

Create New Prevailing Wage Report - Project No. OCI-080001 - Google C...

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upwr/1006?\_uref=...

Create New Prevailing Wage Report

General **Subcontractor Details**

Line Item Details

Subcontractor Name \*  
Fred's Concrete Services 1

Utilized This Period?  
Yes

Payroll submitted?  
Yes

Subcontractor Payroll Period Start  
02/01/2020 05:00 PM (UTC-8)

Subcontractor Payroll Period End  
02/29/2020 05:00 PM (UTC-8)

Short Description \*  
Fred's Concrete Payroll

Notes

Award Date  
MM/DD/YYYY HH:MM AM

EDGE Certified?  
Yes

Cancel **Save** Save & Add New



# Prevailing Wage Report (Contractor)

- ▶ Upload any necessary supporting documentation into Document Manager and attach to the record under the **Attachments** tab
- ▶ Change **Status** to **Complete**
- ▶ Click **Finish Editing**
- ▶ **Note:** Once you click Submit and the Status of the record is “Complete” the record will be locked and can no longer be edited.

The screenshot shows a web browser window with the URL `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upwr/1006?__uref=uuu818388450t2`. The page title is "Create New Prevailing Wage Report". The form is divided into two tabs: "General" (selected) and "Subcontractor Details".

**General Tab Fields:**

- Organization: Department of Administrative Services
- Record Number: PWR-0267
- Project Number: OCI-080001
- Creation Date: 07/28/2020 08:22 PM (UTC-8)
- Project Name: OAKS CI Training 1
- Creator: Matthew Weber
- Project Location: Surface Road
- Status: Complete (highlighted with a red box and arrow)
- Contract Name: Fred 20091009 OAKS Plum... (with a dropdown arrow, close icon, and refresh icon)
- Contractor Name: Sands Decker Ltd.
- Pay Request Period Start: 02/21/2020 05:00 PM (UTC-8) (with a calendar icon)
- Pay Request Period End: 02/29/2020 05:00 PM (UTC-8) (with a calendar icon)

**Attachments Tab:** The "Attachments" tab is highlighted with a red box. Below it, there is a paperclip icon and a dropdown arrow. At the bottom of the Attachments panel, there is an "Information" icon and the text "No Attachments."

**Buttons:** The "Submit" button is circled in red, and the "Save" button is next to it. A red arrow points to the "Submit" button.



# Contractor Pay Request



# Purpose & Procedure

- ▶ The Contractor Pay Request Business Process (BP) allows for the contractor to request payment for items recorded in the Contract SOV.
- ▶ Please note that these procedures may not include all functions of your job, please speak with your manager or team member to ensure that you are fulfilling all expectations.



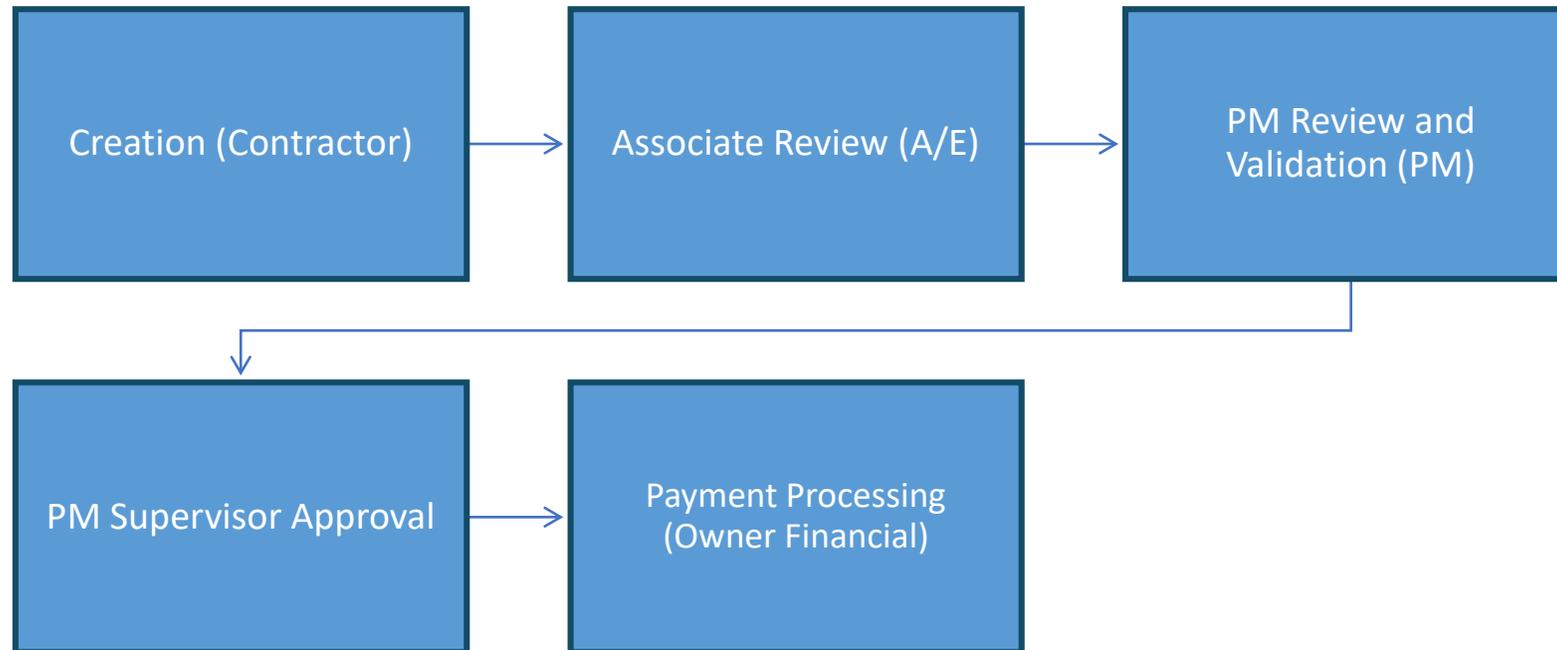
# Steps, Roles and Responsibilities

- ▶ Contractor
  - ▶ Creates the Pay Request record
  - ▶ Provides clarifications and updates to the Pay Request record
- ▶ A/E
  - ▶ Reviews and Accepts the Pay Request record
- ▶ Project Manager
  - ▶ Reviews and verifies the Pay Request record
- ▶ Project Manager Supervisor
  - ▶ Approves the Pay Request record
- ▶ Agency Owner Financial
  - ▶ Determines source of Funding
  - ▶ Creates voucher
  - ▶ Processes payment in own system of record and records payment in OAKS CI



# Contractor Pay Request

- ▶ Workflow Steps



# Contractor Pay Request Creation (Contractor)

- Log into OAKS CI
  - a. Click + sign
  - b. Type project name or number in search bar
  - c. Click appropriate project to open

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



# Contractor Pay Request Creation (Contractor)

- ▶ In OAKS CI navigate to:
  - ▶ Logs -> **Contractor Pay Request**
  - ▶ Click **Create**

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'Agency' and 'OAKS CI Trainin...'. The left sidebar contains a list of menu items, with 'Logs' circled in red. A red arrow points from the 'Logs' menu item to the 'Contractor Pay Request' item in the sidebar. The main content area shows the 'Contractor Pay Request' page with a '+ Create' button circled in red. Below the button is a table with columns 'Title' and 'Con'. The table contains 37 rows of data, including items like 'Stored Materials Test', 'Winnie PR1', 'Katie PR1', 'AGO-150001.02\_PR001', 'Morris\_PR 0001', 'Student 7', 'Student 6', 'Morrison Building PR4 ...', 'Morrison Building PR3', 'Morrison Building PR2', 'Morrison Building PR1', 'Harrison PR3 Final', 'Harrison PR2', 'Harrison PR1', 'Student 5', and 'Student 4'. The total number of items is indicated as 'Total: 37' at the bottom right of the table.

Title	Con
Stored Materials Test	Wed
Winnie PR1	Mon
Katie PR1	SSS
AGO-150001.02_PR001	Wed
Morris_PR 0001	Mon
Student 7	Stuf
Student 6	Sch
Morrison Building PR4 ...	Mon
Morrison Building PR3	Mon
Morrison Building PR2	Mon
Morrison Building PR1	Mon
Harrison PR3 Final	Mon
Harrison PR2	Mon
Harrison PR1	Mon
Student 5	Wed
Student 4	NEC



# Contractor Pay Request Creation (Contractor)

- Enter all required \* fields under the **General** tab, scrolling down as necessary

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_\_uref=uuu818388450t2

### Create New Contractor Pay Request

Send Save

**General** Pay Request Details Added Purchase Orders

**General**

Organization Department of Administrative Services	Record Number
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date
Project Location Surface Road	Status
<b>Title *</b> OCI-100056-01-02 PR2	<b>Request Date *</b> 03/02/2020 05:00 PM (UTC-8)
<b>Contract Reference *</b> Fred 20091009 OAKS Plumbing	<b>Contractor Name</b> Sands Decker Ltd.
<b>Final Payment? *</b> No	<b>EDGE Certified Prime?</b> No
<b>Retainage Release Requested?</b> No	<b>Period To *</b> 02/29/2020 05:00 PM (UTC-8)
<b>Period From *</b> 02/01/2020 05:00 PM (UTC-8)	<b>A/E Approval Date</b>
<b>Internal Ref. Number</b>	

▶ Prevailing Wage

**Attachments** Comr >

Information  
No Attachments.



# Contractor Pay Request Creation (Contractor)

- Scroll down to the **Prevailing Wage** section
- Click **Select** next to Prevailing Wage Report
- Choose appropriate **Prevailing Wage Report**

The screenshot displays the 'Create New Contractor Pay Request' interface. The 'Prevailing Wage' section is active, showing a dropdown menu with 'Sands Decker Ltd.' selected. A red circle highlights the 'Select' button next to the dropdown. A red arrow points from this button to a modal window titled 'Prevailing Wage Report'. This modal window contains a table with the following data:

Contract SOV Name	Contractor Name	Pay Request Period Start	Pay Request Period End	Status	Record
Fred 20091009 OAK...	Sands Decker Ltd.	02/21/2020 05...	02/29/2020 05...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	02/01/2020 05...	02/29/2020 05...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	05/01/2013 10...	05/31/2013 10...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	02/18/2013 09...	03/29/2013 10...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	02/15/2013 09...	03/15/2013 10...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	02/01/2013 09...	02/28/2013 09...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	02/15/2013 09...	02/28/2013 09...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	02/15/2013 09...	02/28/2013 09...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	01/01/2014 09...	01/31/2013 09...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	01/01/2013 09...	01/31/2013 09...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	11/01/2011 11...	11/30/2011 09...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	11/01/2011 11...	11/30/2011 09...	Complete	PWR-

At the bottom of the modal, there is a 'Total: 192' and two buttons: 'Cancel' and 'Select'. A red arrow points to the 'Select' button. The background page shows the 'General' tab selected, with fields for 'Pay Request Period Start' (02/21/2020 05:00 PM (UTC-8)) and 'Pay Request Period End' (02/29/2020).



# Contractor Pay Request Creation (Contractor)

- ▶ Ensure the Prevailing Wage Start and End Date match the Pay Request

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_\_uref=uuu818388450t2

### Create New Contractor Pay Request

Send Save

**General** Pay Request Details Added Purchase Orders

**Project Location**  
Surface Road

**Status**

**Title \***  
OCI-100056-01-02 PR2

**Request Date \***  
03/02/2020 05:00 PM (UTC-8)

**Contract Reference \***  
Fred 20091009 OAKS ...

**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**

**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**  
No Attachments.



# Contractor Pay Request Creation (Contractor)

- Previous Pay Request block:
  - 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

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu818388450t2

## Create New 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? \***  
Yes

Previous Pay Request Previous PR Vendor

Period From Period To

Stored Materials Summary

Earned Current Request

Completed to Date

Attachments

Information  
No Attachments.



# Contractor Pay Request Creation (Contractor)

- ▶ If you have a previous pay request:
- ▶ Click the **Select** button
- ▶ Choose Previous Pay Request
- ▶ Click **Select**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu818388450t2

### Contractor Pay Request

Search | Find on Page

Title	Contract SOV	Contractor Name	Percent Complete	Total Payment Requested	Sum of Payments
OCI-100056-01-01 PR1	Hooks Test1	Sands Decker Ltd.	0	0.00	0.
Sands Decker Ltd._P...	Hooks Test1	Sands Decker Ltd.	78.88	236.50	836.
Test - mmw	Hooks Test1	Sands Decker Ltd.	0	0.00	0.
pr 77	Hooks Test1	Sands Decker Ltd.	63.89	284.00	607.
Test PR1	Hooks Test1	Sands Decker Ltd.	31.09	323.00	323.
DYS-100056-01-01 P...	Hooks Test1	Sands Decker Ltd.	28.87	300.00	300.
<b>Fred 20091008</b>	<b>Fred 2009100...</b>	<b>OAKS Plumbing</b>	<b>6</b>	<b>43,800.00</b>	<b>43,800.</b>

Total: 7

Cancel **Select**

Previous Pay Request \*  
Fred 20091008

Initial Pay Request? \*  
No

Period From: 09/01/2009 10:00 AM (UTC-8)  
Period To: 09/30/2009 10:00 AM (UTC-8)

▶ Stored Materials Summary

▶ Earned Current Request

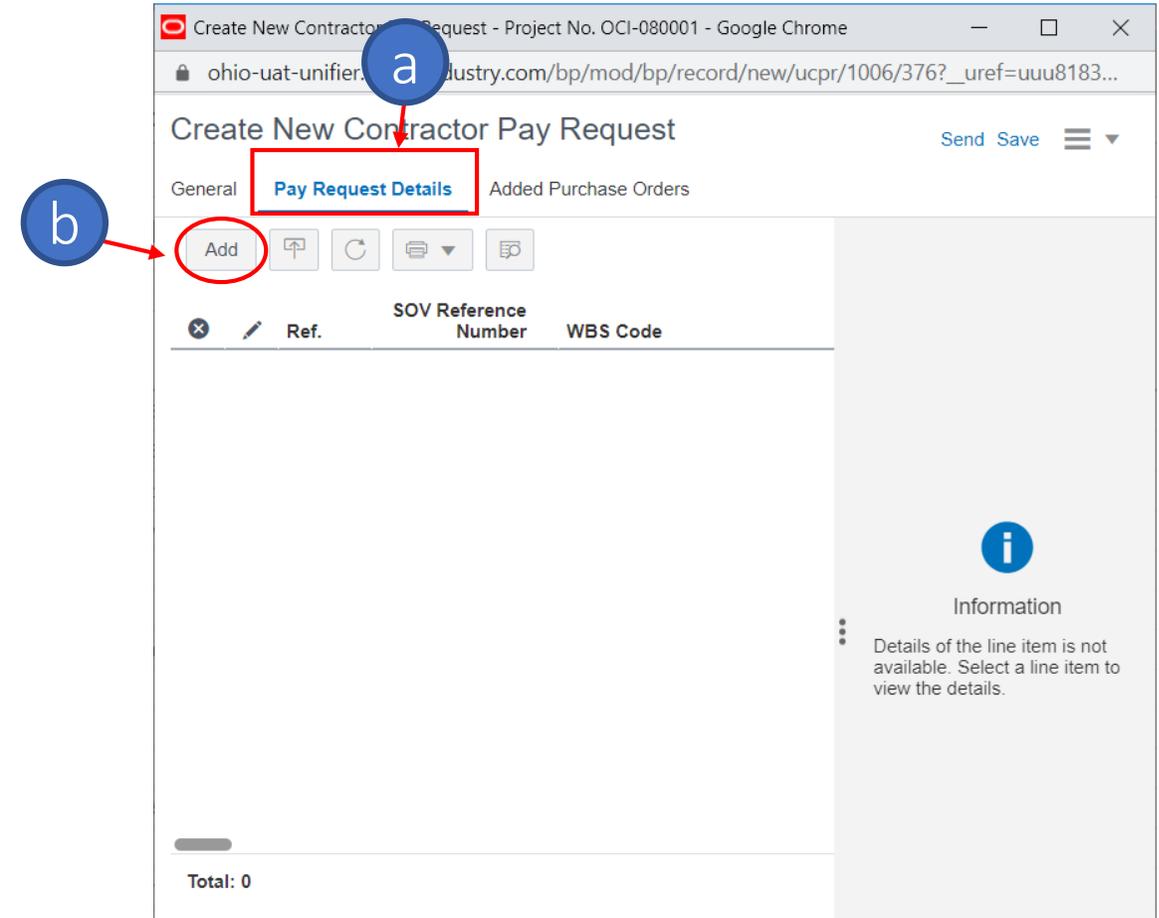
▶ Completed to Date

Information  
No Attachments.



# Add Line Items (Contractor)

- a) Click on the **Pay Request Detail** 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 Contractor Pay Request - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu818388450t2

### Create New Contractor Pay Request

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**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu818388450t2

Create New Contractor Pay Request

General Pay Request Details Added Purchase Orders

**Earned Current Request**

Current Services	20,000.00	Current Material	25,000.00
Current Labor	52,500.00	Stored Materials	0.00
Current DPE/Reimb	0.00		
Current Labor Total	72,500.00	Current Materials Total	25,000.00
		<b>Current Earned</b>	<b>97,500.00</b>

Completed to Date

Services	20,000.00
----------	-----------

Attachments

Information

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu818388450t2

Create New Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

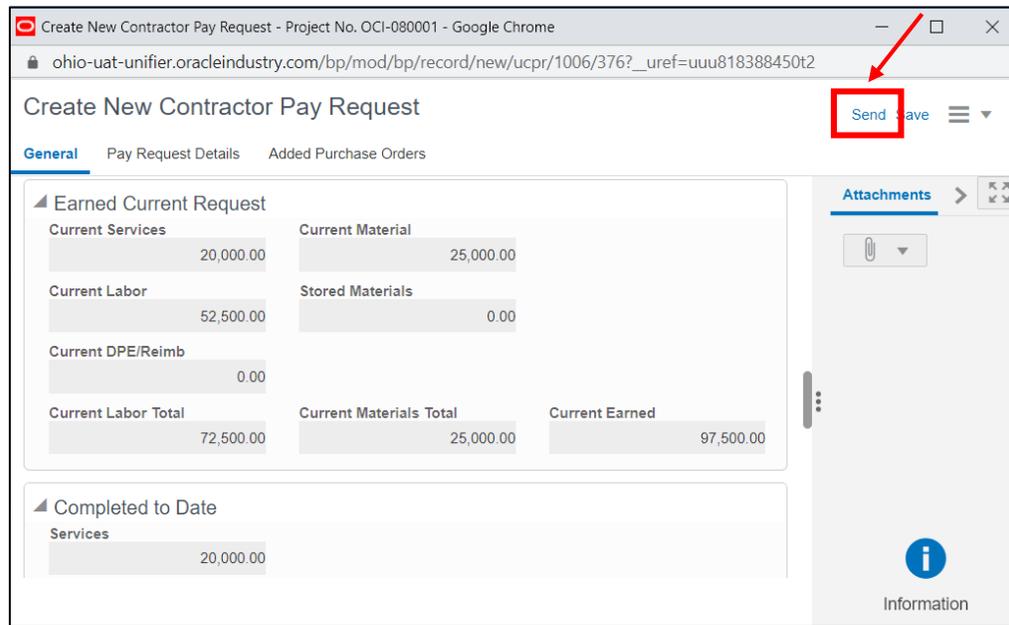
Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period	EDGE Certified Prime Contractor?	EDGE Certified?
0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	25,000.00	25,000.00	No	
0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	20,000.00	20,000.00	No	
0.00	0.00	0.00	97,500.00	97,500.00		

Total: 5



# Send Pay Request (Contractor)

- ▶ Click **Send**
- ▶ Verify the Workflow Action to Submit the record for **Associate Review**
- ▶ Click **Send**



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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu818388450t2

### Create New Contractor Pay Request

General Pay Request Details Added Purchase Orders

**Earned Current Request**

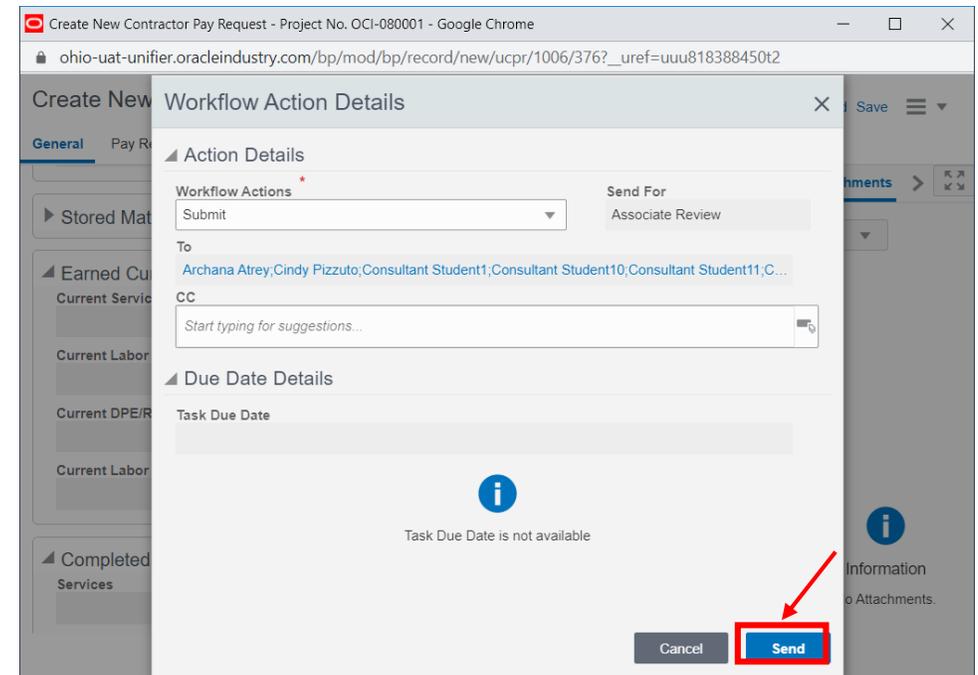
Current Services	20,000.00	Current Material	25,000.00		
Current Labor	52,500.00	Stored Materials	0.00		
Current DPE/Reimb	0.00				
Current Labor Total	72,500.00	Current Materials Total	25,000.00	Current Earned	97,500.00

**Completed to Date**

Services	20,000.00
----------	-----------

Attachments

Send Save



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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu818388450t2

### Create New Contractor Pay Request

Workflow Action Details

General Pay Request Details Added Purchase Orders

**Action Details**

Workflow Actions: Submit

Send For: Associate Review

To: Archana Atrey, Cindy Pizzuto, Consultant Student1, Consultant Student10, Consultant Student11, C...

CC: Start typing for suggestions...

**Due Date Details**

Task Due Date: Task Due Date is not available

Cancel Send



# As sociate Review (A/E)

- The A/E will receive a notification via email that a Contractor Pay Request/Application for Payment is awaiting Review



# Associate Review (A/E)

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

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

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

**Contractor Pay Request CPR-0016 is sent to you for Associate Review.**

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

Source Name : **OAKS CI Training 1**  
Record No : **Contractor Pay Request CPR-0016**  
Title : **OCI-100056-01-01 PR1**

**Unifier Login**

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



# Accept the Task

- ▶ Click Accept Task

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/214394?task\_id=214394&parent\_id=0&viewOnly=0&project\_id=1006&model...". The page title is "Contractor Pay Request". In the top right corner, there are buttons for "Accept" (circled in red) and "Decline". Below the title, there are tabs for "General", "Pay Request Details", "Added Purchase Orders", and "Voucher". The "General" tab is selected. The page is divided into two main sections: "Task Details" and "General".

**Task Details**

- From:** Matthew Weber
- To:** Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Student11;Consultant ...
- Sent For:** Associate Review

**General**

<b>Organization</b> Department of Administrative Services	<b>Record Number</b> CPR-0018
<b>Project Name</b> OAKS CI Training 1	<b>Creator</b> Matthew Weber
<b>Project Number</b> OCI-080001	<b>Creation Date</b> 07/28/2020 09:45 PM (UTC-8)
<b>Project Location</b> Surface Road	<b>Status</b> Pending

**Attachments** | Comments | List > | [Full Screen]

**Information**  
No Attachments.



# Associate Review (A/E)

- ▶ Review all fields in the General tab, scrolling down as necessary

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214394/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 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? 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

**Attachments** Co >

No Attachments.



# Associate Review (A/E)

- ▶ Click the **Pay Request Details** tab
- ▶ Review the individual line items
- ▶ Scroll to the right to review the Total Amount Requested

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214394/undefined/undefined?\_uref=uuu818388450t2

Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

Ref.	SOV Reference Number	WBS Code	Code Name	Commit Short Description	Short Description *	Subcontr:
001	1	CE-FC-03L	Concrete Labr	labor - concrete	Concrete Labor	
002	2	CE-FC-03M	Concrete Matl	material - concrete	Concrete Material	
003	3	CE-FC-03L	Concrete Labr	concrete labor 2	Concrete Labor	
004	4	CE-FC-03L	Concrete Labr	concrete labor 3	Concrete Labor	
005	5	CE-01-IN	CE Insurance	insurance	Insurance	
<b>TOTAL</b>						

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/214394/undefined/undefined?\_uref=uuu818388450t2

Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

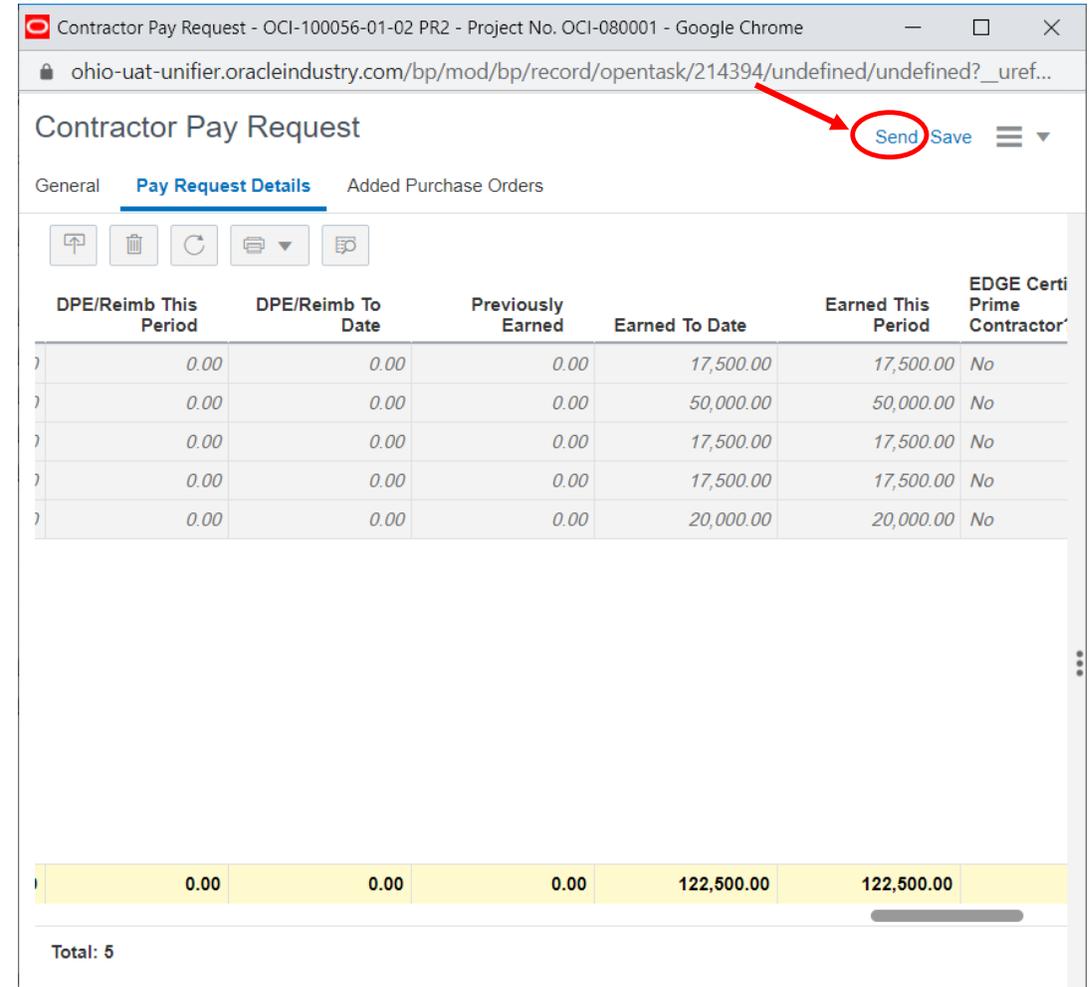
DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period	EDGE Certified Prime Contractor?	EDGE Certified?
0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	50,000.00	50,000.00	No	
0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	17,500.00	17,500.00	No	
0.00	0.00	0.00	20,000.00	20,000.00	No	
<b>TOTAL</b>						

Total: 5



# Associate Review (A/E)

- ▶ 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/214394/undefined/undefined?\_uref...". The page title is "Contractor Pay Request". There are tabs for "General", "Pay Request Details" (selected), and "Added Purchase Orders". A toolbar contains icons for print, delete, refresh, and search. Below the toolbar is a table with the following columns: "DPE/Reimb This Period", "DPE/Reimb To Date", "Previously Earned", "Earned To Date", "Earned This Period", and "EDGE Certi Prime Contractor'". The table has 5 rows of data. At the bottom of the table, there is a summary row with a yellow background. Below the table, it says "Total: 5". In the top right corner of the page, there are buttons for "Send", "Save", and a menu icon. A red arrow points to the "Send" button, which is circled in red.

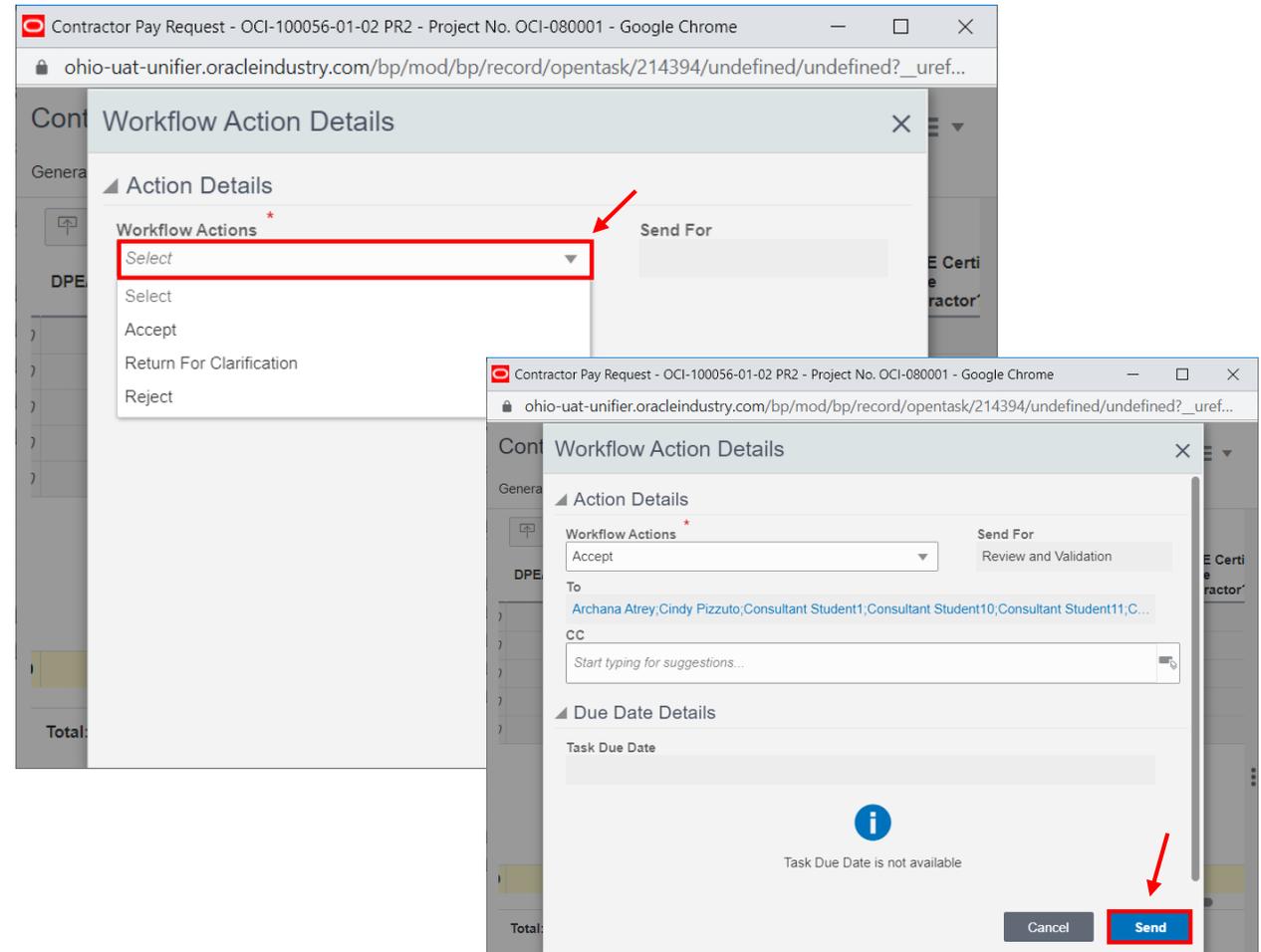
DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period	EDGE Certi Prime Contractor'
0.00	0.00	0.00	17,500.00	17,500.00	No
0.00	0.00	0.00	50,000.00	50,000.00	No
0.00	0.00	0.00	17,500.00	17,500.00	No
0.00	0.00	0.00	17,500.00	17,500.00	No
0.00	0.00	0.00	20,000.00	20,000.00	No
0.00	0.00	0.00	122,500.00	122,500.00	

Total: 5



# Associate Review (A/E)

- ▶ If record must be returned to the Contractor 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 and Validation
  - ▶ Choose **Accept**
  - ▶ Click **Send**
- ▶ If record should be rejected, ending the Contractor Pay Request Process
  - ▶ Choose **Reject**
  - ▶ Click **Send**



# PM Review and Validation

- The Project Manager will receive a notification via email that a Contractor Pay Request/Application for Payment is awaiting Approval



# PM Review and Validation

- ▶ 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**

**Contractor Pay Request CPR-0028 is sent to you for Review and Validation.**

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

Source Name : **Agency General Projects Test**  
Record No : **Contractor Pay Request CPR-0028**  
Title : **OCI-100056-01-01 PR2**

[Unifier Login](#)



# PM Review and Validation

- ▶ Click Accept Task

The screenshot shows a web browser window displaying a 'Contractor Pay Request' page. The browser's address bar shows the URL: `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214436?task_id=214436&parent_id=0&viewOnly=0&project_id=1006&model=ucpr&...`. The page title is 'Contractor Pay Request'. In the top right corner, there are two buttons: 'Accept' and 'Decline'. The 'Accept' button is circled in red, and a red arrow points to it from the left. Below the title, there are tabs for 'General', 'Pay Request Details', 'Added Purchase Orders', and 'Voucher'. The 'General' tab is selected. The main content area is divided into two sections: 'Task Details' and 'General'. The 'Task Details' section includes fields for 'From' (Matthew Weber), 'To' (Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Student11;Consultant Stud...), and 'Sent For' (Review and Validation). The 'General' section is a table of key-value pairs: Organization (Department of Administrative Services), Project Name (OAKS CI Training 1), Project Number (OCI-080001), Project Location (Surface Road), Title (OCI-100056-01-02 PR2), Record Number (CPR-0018), Creator (Matthew Weber), Creation Date (07/28/2020 09:45 PM (UTC-8)), Status (Pending), and Request Date (03/02/2020 05:00 PM (UTC-8)). On the right side of the page, there is a sidebar with tabs for 'Attachments', 'Comments', and 'Linked'. The 'Attachments' tab is selected, and it shows an information icon and the text 'Information No Attachments.'



# PM 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' section contains two columns of fields. The 'Final Payment?' and 'Retainage Release Requested?' fields are highlighted with a red box and both have 'No' selected. The 'Attachments' section on the right shows 'No Attachments'.

Contractor Pay Request	
Organization	Department of Administrative Services
Project Name	OAKS CI Training 1
Project Number	OCI-080001
Project Location	Surface Road
Title	Sands Decker Ltd_PR02
Contract Reference	Fred 20091009 OAKS Plumbing
Record Number	CPR-0018
Creator	Matthew Weber
Creation Date	07/28/2020 09:45 PM (UTC-8)
Status	Pending
Request Date	03/02/2020 05:00 PM (UTC-8)
Contractor Name	Sands Decker Ltd.
EDGE Certified Prime?	No
Final Payment?	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



# PM 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

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
<b>Title</b> 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	
<b>Period From</b> 02/01/2020 05:00 PM (UTC-8)	<b>Period To</b> 02/29/2020 05:00 PM (UTC-8)
Internal Ref. Number	A/E Approval Date MM/DD/YYYY HH.MM AM

Attachments Comm

Information  
No Attachments.



# PM 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, Insurance Verification, and Attachments. Annotations a, b, c, and d highlight specific steps in the process.

**Contractor Address Section:** Includes fields for Contractor (Sands Decker Ltd.), Address Line 1 (60 E Spring St), Address Line 2, City (Columbus), State (Ohio), and ZIP (43215). A red circle 'a' highlights the 'Select' button next to the Contractor field.

**Project Vendors Section:** A table with columns: OAKS Business Unit, Vendor Name, OAKS Vendor ID, Local Vendor ID, and City. The table lists five vendors, with 'Sands Decker Ltd.' highlighted in blue. A red circle 'b' points to this row. At the bottom right, a red circle 'c' highlights the 'Select' button.

**Insurance Verification Section:** Includes a warning: 'Ensure that the "Insurance Expiration Date" is greater than or equal to "Period To Date"'. A red box 'd' highlights the 'General Liability Insurance Expiration Date' field, which contains '12/31/2009 09:00 AM (UTC-8)'. Other fields include Professional Liability Insurance Expiration Date, Worker's Comp Expiration Date, and Notes.

**Attachments Section:** Shows 'No Attachments.' and a 'Cancel' button.



# PM 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



# PM 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



# PM 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 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
<b>Current Earned</b>	<b>122,500.00</b>

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. A blue information icon is visible at the bottom right of the page.



# PM 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

The screenshot shows a web browser window with the URL `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" and it has tabs for "General", "Pay Request Details", and "Added Purchase Orders".

The "Retainage" section is highlighted with a red box. It contains the following fields and values:

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				

The "Withheld Amounts" section is also highlighted with a red box. It contains the following fields and values:

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		

On the right side of the form, there is an "Attachments" section with a paperclip icon and a dropdown menu. Below it is an "Information" section with a blue 'i' icon and the text "Information No Attachments."



# PM 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 "General" tab is selected, with sub-tabs for "Pay Request Details" and "Added Purchase Orders". The "Escrow Paid to Bank" section is highlighted with a red box. Below it, a note states: "Move amounts from Withheld Amounts to Escrow Paid to Bank when the escrow check is send to the bank". The form contains the following fields:

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"/>

Below the table is a "Payment Requested" section with a right-pointing arrow.



# PM 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
<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 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



# PM 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

**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=...

### Contractor Pay Request

General Pay Request Details Added Purchase Orders

#### Earned Current Request

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

Completed to Date

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

0.00	0.00	0.00	0.00	<b>122,500.00</b>	122,500.00
Total: 5					

#### 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
Escrowed Payments Labor	0.00	Escrowed Payments Material	0.00
		Previous Payments	836.50
<b>Labor Payment Requested</b>	<b>67,670.50</b>	<b>Material Payment Requested</b>	<b>49,793.00</b>
		<b>Total Requested</b>	<b>117,463.50</b>



# PM 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

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 tabs for '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, with a red arrow pointing to it. To the right of the 'Add' button is an 'Actions' dropdown menu. Below these buttons is a table with 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 fields for: '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 buttons for 'Cancel', 'Save', and 'Save & Add New'.



# PM 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

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

**Attachments** > ⌵

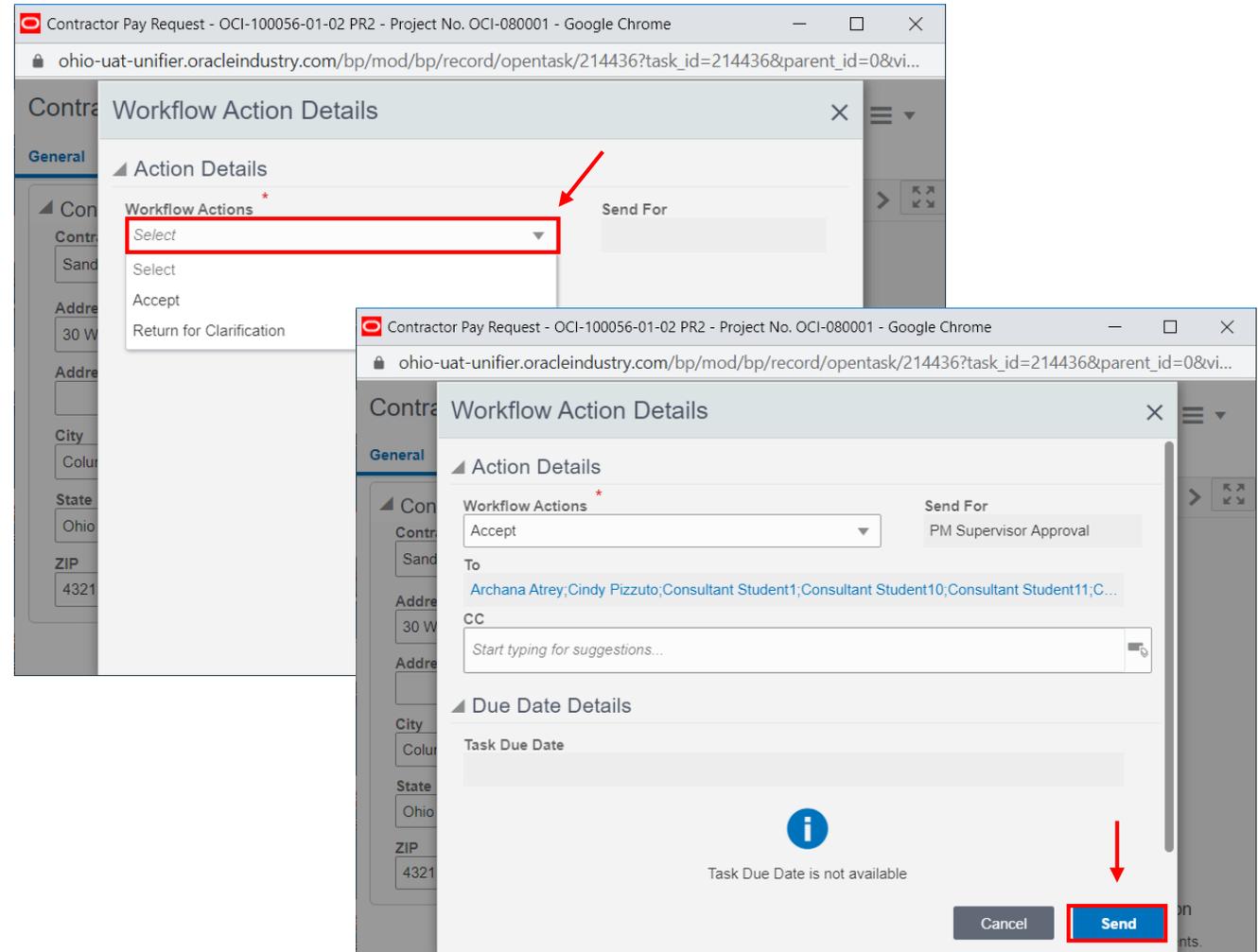
⌵

**Information**  
No Attachments.



# PM Review and Validation

- ▶ If record must be returned to the Contractor 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 Supervisor 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

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

**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
<b>Retainage Release Requested?</b> Yes	

**Attachments** Comments

Information  
No Attachments.



# 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



# PM Supervisor Review

- The Project Manager Supervisor will receive a notification via email that a Contractor Pay Request/Application for Payment is awaiting Review



# PM Supervisor Review

- ▶ 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**

**Contractor Pay Request CPR-0028 is sent to you for PM Supervisor Approval.**

**From :** Matthew Weber  
**Sent For :** PM Supervisor Approval

**Source Name :** Agency General Projects Test  
**Record No :** Contractor Pay Request CPR-0028  
**Title :** OCI-100056-01-01 PR2

[Unifier Login](#)



# PM Supervisor Review

- ▶ Click Accept Task

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/214677?task\_id=214677&parent\_id=0&viewOnly=0&project\_id=1006&model=ucpr&\_uref=uuu3...". The page title is "Contractor Pay Request".

At the top right, there are two buttons: "Accept" and "Decline". The "Accept" button is circled in red, and a red arrow points to it from the right. To the right of these buttons is a menu icon (three horizontal lines).

The page has several tabs: "General" (selected), "Pay Request Details", "Added Purchase Orders", and "Voucher".

The main content area is divided into two sections:

- Task Details:**
  - From:** Matthew Weber
  - To:** Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Student11;Consu...
  - Sent For:** PM Supervisor Approval
- General:**

<b>Organization</b> Department of Administrative Services	<b>Record Number</b> CPR-0018
<b>Project Name</b> OAKS CI Training 1	<b>Creator</b> Matthew Weber
<b>Project Number</b> OCI-080001	<b>Creation Date</b> 07/28/2020 09:45 PM (UTC-8)
<b>Project Location</b> Surface Road	<b>Status</b> Pending
<b>Title</b> OCI-100056-01-02 PR2	<b>Request Date</b> 03/02/2020 05:00 PM (UTC-8)

On the right side, there is a sidebar with tabs: "Attachments" (selected), "Comments", "Linked Records", and "Linked Mai". Below the tabs is a large grey area with a blue information icon (i) and the text "Information" and "No Attachments."



# PM Supervisor Review

- ▶ Review the information in the **General** tab
- ▶ 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

**General** Pay Request Details Added Purchase Orders

**General**

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

**Attachments** Comm >

Information  
No Attachments.



# PM Supervisor 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

Information  
No Attachments.



# PM Supervisor 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:** The Contractor field is set to "Sands Decker Ltd.". A red circle labeled 'a' highlights a "Select" button next to the contractor name.

**Project Vendors Section:** A modal window displays a table of vendors. A red circle labeled 'b' highlights the "Sands Decker Ltd." row. A red circle labeled 'c' highlights the "Select" button at the bottom right of the modal.

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	0000007114		Westerville
DOT01	Sands Decker Ltd.	0000008325		Columbus

**Insurance Verification Section:** A red circle labeled 'd' highlights the "General Liability Insurance Expiration Date" field, which is set to "12/31/2009 09:00 AM (UTC-8)".



# PM Supervisor 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 Supervisor 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 Supervisor 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" and it has tabs for "General", "Pay Request Details", and "Added Purchase Orders". The "General" tab is active. 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
<b>Current Earned</b>	<b>122,500.00</b>

Below the table is a section for "Completed to Date". To the right of the main content is an "Attachments" sidebar with a paperclip icon and a search field. A blue information icon is visible at the bottom right of the sidebar.



# PM Supervisor 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

The screenshot shows a web browser window with the URL `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".

**Retainage Section:**

- Contract Percent Complete: 31.06
- Retainage % \*: 8.00
- Retainage: 4200.00
- 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 Section:**

- 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

The "Retainage %" field and the "Withheld Amounts" section are highlighted with red boxes in the original image.



# PM Supervisor 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 is a table with three columns: "Contract Retainage Escrowed", "Escrowed Retainage Released", and "Escrowed Retainage Balance". The values in the first two columns are 0.00, and the balance is 0.00. Below this table, there are two rows for "Lien Escrow Labor" and "Lien Escrow Material", each with "Released" and "Balance" columns, all showing 0.00. A "Payment Requested" button is visible at the bottom of the form. On the right side, there is an "Attachments" section with a "Commer" button and a menu icon.

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

▶ Payment Requested



# PM Supervisor 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 Supervisor 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
<b>TOTAL</b>							<b>350,000.00</b>	<b>75.00</b>	<b>50.00</b>	<b>50.00</b>

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 Supervisor 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 of earnings. A red box highlights the 'Current Earned' field with a value of 122,500.00, marked with callout 'a'. Below this, a table shows a summary of earnings with a total of 122,500.00, marked with callout 'b'. On the right, the 'Payment Requested' section shows a summary of requested payments. A red box highlights the 'Total Requested' field with a value of 117,463.50, marked with callout 'c'. The 'Total Requested' is calculated as Labor Payment Requested (67,670.50) plus Material Payment Requested (49,793.00).

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

Completed to Date	0.00	0.00	0.00	0.00	122,500.00	122,500.00
Total: 5						

Payment Requested	Payment Requested	Payment Requested
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
629.50	207.00	836.50
Escrowed Payments Labor	Escrowed Payments Material	
0.00	0.00	
<b>Labor Payment Requested</b>	<b>Material Payment Requested</b>	<b>Total Requested</b>
67,670.50	49,793.00	117,463.50



# PM Supervisor 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

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 page title is 'Contractor Pay Request'. There are tabs for '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, with a red arrow pointing to it. To the right of the 'Add' button is an 'Actions' dropdown menu. Below these buttons is a table with columns: 'No.', 'OAKS PO No.', 'OAKS PO Amount (\$)', 'OAKS Amount Applied (\$)', and 'OAKS PO Date'. The table is currently empty. At the bottom left of the table area, it says 'Total: 0'. On the right side of the interface, there is a 'Line Item Details' panel. It contains fields for: '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 'Line Item Details' panel are buttons for 'Cancel', 'Save', and 'Save & Add New'.



# PM Supervisor 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:

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

- ▶ If record must be returned to the Contractor 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 Owner Financial for Payment Processing:
  - ▶ Choose **Approve**
  - ▶ Click **Send**

The image displays two screenshots of a web application interface for Contractor Pay Request. The top screenshot shows the 'Workflow Action Details' dialog box with the 'Workflow Actions' dropdown menu open, highlighting the 'Return For Clarification' option. A red arrow points to this option. The bottom screenshot shows the same dialog box with the 'Workflow Actions' dropdown set to 'Approve'. The 'Send For' field is populated with 'Payment Processing'. The 'To' field lists several users: 'Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Student11;C...'. The 'CC' field is empty. The 'Due Date Details' section shows 'Task Due Date' as 'Task Due Date is not available'. A red arrow points to the 'Send' button at the bottom right of the dialog box.



# 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

**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
<b>Retainage Release Requested?</b> Yes	

**Attachments** Comments

Information  
No Attachments.



# 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



# PM Supervisor Review

- ▶ Click Select in the Contractor Address block, pull in the appropriate Project Vendor record
- ▶ Check insurance Verification field, 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. The main form is titled "Contractor Pay Request - Sands Decker Ltd., PR01 - Project No. OCI-080001". It has several sections:

- Contractor Address:** Fields for Contractor (Sands Decker Ltd.), Address Line 1 (123 Main St), Address Line 2, City (Columbus), State (Ohio), and ZIP (43216). A "Select..." button is highlighted with a red arrow.
- Insurance Verification:** A section with a warning: "Ensure that the 'Insurance Expiration Date' is greater than or equal to 'Period To Date'". It contains fields for General Liability Insurance Expiration Date (12/31/2009 09:00 AM (UTC-8)), Professional Liability Insurance Expiration Date, and Worker's Comp Expiration Date. A "Notes" field is also present.
- Purchase Order Information:** A section for adding purchase orders.
- Action Details:** A section for pay request details and added purchase orders.

Below the main form is a "Project Vendors" window showing a table of vendors:

OAKS Business Unit	Vendor Name	OAKS Vendor ID	Local Vendor ID	City
DOT01	OAKS Plumbing	0000010252		Columbus
DOT01	Random Roofing and Repair	0000007114		Westerville
DOT01	Sands Decker Ltd.	0000008325		Columbus



# Owner Financial Payment Processing

- The Owner Financial will receive a notification via email that a Contractor Pay Request/Application for Payment is awaiting Processing



# Owner Financial Payment Processing

- ▶ As the **Owner Financial** representative you will:
  - ▶ Create a Voucher (check) in your own financial system of record
  - ▶ Create a **Voucher** Record in OAKS CI
  - ▶ Pull the **Voucher** Record into the Pay Request



# Receive an Email (Owner Financial)

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

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

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

**Contractor Pay Request CPR-0028 is sent to you for Payment Processing.**

From : **Matthew Weber**  
Sent For : **Payment Processing**

Source Name : **Agency General Projects Test**  
Record No : **Contractor Pay Request CPR-0028**  
Title : **OCI-100056-01-01 PR2**

[Unifier Login](#)



# Task Action (Owner Financial)

- ▶ Click Accept Task to begin work on your task

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214723?task\_id=214723&parent\_id=0&viewOnly=0&project\_id=1006&model...

## Contractor Pay Request

[Accept](#) [Decline](#) ☰

**General** Pay Request Details Added Purchase Orders Voucher

### Task Details

**From**  
Matthew Weber

**To**  
Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Student11;Consultant St...

**Sent For**  
Payment Processing

### General

<b>Organization</b> Department of Administrative Services	<b>Record Number</b> CPR-0018
<b>Project Name</b> OAKS CI Training 1	<b>Creator</b> Matthew Weber
<b>Project Number</b>	<b>Creation Date</b>

**Attachments** Comments ➤ ⌵

**i**  
Information  
No Attachments.



# Payment Processing (Owner Financial)

- ▶ Click General Tab to expand upper form
- ▶ Review the **Total Requested** field. This is the amount you will use to create your Voucher (check)
- ▶ Create the payment in **your own system of record**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214723/undefined/undefined?\_uref=uuu387999349t2

### Contractor Pay Request

Send Save [Menu]

**General** Pay Request Details Added Purchase Orders Voucher

**Payment Requested**  
Voucher the Labor Payment Requested and Material Payment Requested from the bottom line of this block.

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	<b>Total Requested</b>	<b>117,463.50</b>

Attachments Co > [Menu]

Information



# Recording a New Voucher Record in OAKS CI (Owner Financial)

- ▶ Open the **Voucher** tab
- ▶ Click **Create**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214723/undefined/undefined?\_\_uref=uuu387999349t2

## Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders **Voucher**

+ Create

Title	Vendor Name	Voucher Description	Amount (\$)	Status	OAK Vou
-------	-------------	---------------------	-------------	--------	---------

Total: 0



# Voucher Upper Form (Owner Financial)

- ▶ Title the Record
- ▶ Set the Record Status to **Paid**
- ▶ Choose Financial System of Record

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1006/0/1/gen\_cont\_pay\_request\_bp/742/6?\_u...

### Create New Vouchers

Submit Save

General Voucher Distribution Line

**General**

Organization: Department of Administrative Services

Project Number: OCI-080001

Project Name: OAKS CI Training 1

Project Location: Surface Road

Title \*: Contractor Pay Request 016

Record Number: [Empty]

Creator: Matthew Weber

Creation Date: [Calendar Icon]

Status \*: Paid

Financial System of Record \*: OAKS FIN

Attac >

Information

No Attachments



# Voucher Upper Form (Owner Financial)

- ▶ Pay request details will automatically populate

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1006/0/1/gen\_cont\_pay\_request\_bp/742/6?\_u...

### Create New Vouchers

Submit Save

**General** Voucher Distribution Line

Vendor Name  
Sands Decker Ltd.

Amount (\$)	117,463.50
Amount on Other Voucher (\$)	0.00
Amount on This Voucher (\$)	117,463.50
Line Item Total (\$)	0.00
Difference (\$)	117,463.50

Notes

Attac

Information  
No Attachments.



# Plug in Appropriate PO (Owner Financial)

- ▶ Scroll down to Voucher Line 1
- ▶ Plug in:
  - ▶ OAKS PO Name
  - ▶ Amount (\$)

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1006/0/1/gen\_cont\_pay\_request\_bp/742/6?\_u...

### 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	Amount (\$)
OCI General 080001-05-PO	117,463.50
OAKS PO No.	Line Item Total (\$)
	0.00
Local PO No.	Difference (\$)
	117,463.50

#### Voucher Details

OAKS Voucher Number should be 8 digits ex: 00005678

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

Information  
No Attachments.



# Enter Voucher Details (Owner Financial)

- ▶ Scroll down to the Voucher Details section
- ▶ Plug in:
  - ▶ **Voucher ID number (Check #)**
  - ▶ **Payment Date**
  - ▶ **Payment Method**
  - ▶ **Payment Amount**

The screenshot shows a web browser window titled "Create New Vouchers - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1006/0/1/gen\_cont\_pay\_request\_bp/742/6?\_u...". The page title is "Create New Vouchers" with "Submit Save" and a menu icon. The "General" tab is selected, showing "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	Amount (\$)
OCI General 080001-05-PO	117,463.50
OAKS PO No.	Line Item Total (\$)
	0.00
Local PO No.	Difference (\$)
	117,463.50

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

OAKS Voucher ID	Local Voucher ID
01234567	
OAKS Payment Date	Local Payment Date
07/01/2020 05:00 PM (UTC-8)	MM/DD/YYYY HH:MM AM
OAKS Payment Method	Local Payment Method
Electronic Payment (EFT)	Select
OAKS Payment Amount (\$)	Local Payment Amount (\$)
117,463.50	0.00

Information  
No Attachments.



# Voucher Distribution Lines (Owner Financial)

- ▶ Click - **Voucher Distribution Line** tab
- ▶ Click - **Add**

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

ohio-uat-unifier.oracleindustry.com/bp/m...rd/new/uv1/1006/0/1/gen\_cont\_pay\_request\_bp/742/6?\_u...

Create New Vouchers

Submit Save

General **Voucher Distribution Line**

Add Actions

No. Fund Code Fund Name

Total: 0

Total Amount 0.00

Line Item Details

General

Fund Code \*  
Type a Fund Cod...

Fund Name

Short Description \*

Voucher Line 1 (\$) 0.00

Voucher Line 2 (\$) 0.00

Voucher Line 3 (\$) 0.00

Voucher Line 4 (\$) 0.00

Voucher Line 5 (\$) 0.00

Amount (\$) 0.00

Cancel Save



# Add a Line Item (Owner Financial)

- ▶ Select a **Fund Code**
- ▶ Add a **Short Description** and **Dollar Amount**
- ▶ Plug in **OAKS PO No.**
- ▶ Click **Save**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1006/0/1/gen\_cont\_pay\_request\_bp/742/6?\_uref=...

Create New Vouchers Submit Save

General **Voucher Distribution Line**

Add Actions

Line Item Details

General

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

Fund Name OCI Test Fund

Short Description \* Test Fund

Voucher Line 1 (\$) 200,000.00

Voucher Line 2 (\$) 0.00

Voucher Line 3 (\$) 0.00

Voucher Line 4 (\$) 0.00

Voucher Line 5 (\$) 0.00

Amount (\$) 200,000.00

Financial System of Record OAKS FIN

Total Amount Total: 0

Enter the PO reference for this line item on all split-funded vouchers

OAKS PO No. DAS-0001

OAKS PO No. OAKS PO Amount (\$)

Cancel Save Save & Add New

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1006/0/1/gen\_cont\_pay\_request\_bp/742/6...

Fund Picker

Search | Find on Page

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-DASGSDOCInnnn-DAS-GSD	Fred Projects Funding	OCI

Total: 6

Cancel Select



# Add a Line Item (Owner Financial)

- ▶ Your line(s) will show in the Voucher Distribution Lines tab

The screenshot shows the 'Create New Vouchers' interface. The main table, 'Voucher Distribution Line', has the following data:

No.	Fund Code	Fund Name	Financial System of Record
001	OCI-Other-TestFund-0-OCI-1	OCI Test Fund	OAKS FIN

The 'Line Item Details' panel on the right shows the following information:

- General
- Fund Code: OCI-Other-TestFund-0-OCI-1
- Fund Name: OCI Test Fund
- Short Description: Test Fund
- Voucher Line 1 (\$): 200,000.00
- Voucher Line 2 (\$): 0.00

At the bottom of the table, there is a 'Total Amount' dropdown set to 200,000.00 and a 'Total: 1' indicator.



# Finish Editing (Owner Financial)

- ▶ Attach any additional documentation, if necessary
- ▶ Click **Submit**
- ▶ Your Voucher Record has now been recorded

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1006/0/1/gen\_cont\_pay\_request\_bp/742/6?\_uref=uuu38799...

## Create New Vouchers

General Voucher Distribution Line

**General**

Organization	Department of Administrative Services	Record Number	VOU-0068
Project Number	OCI-080001	Creator	Matthew Weber
Project Name	OAKS CI Training 1	Creation Date	07/30/2020 09:59 AM (UTC-8)
Project Location	Surface Road		
Title *	Contractor Pay Request 016	Status *	Paid
		Financial System of Record *	OAKS FIN

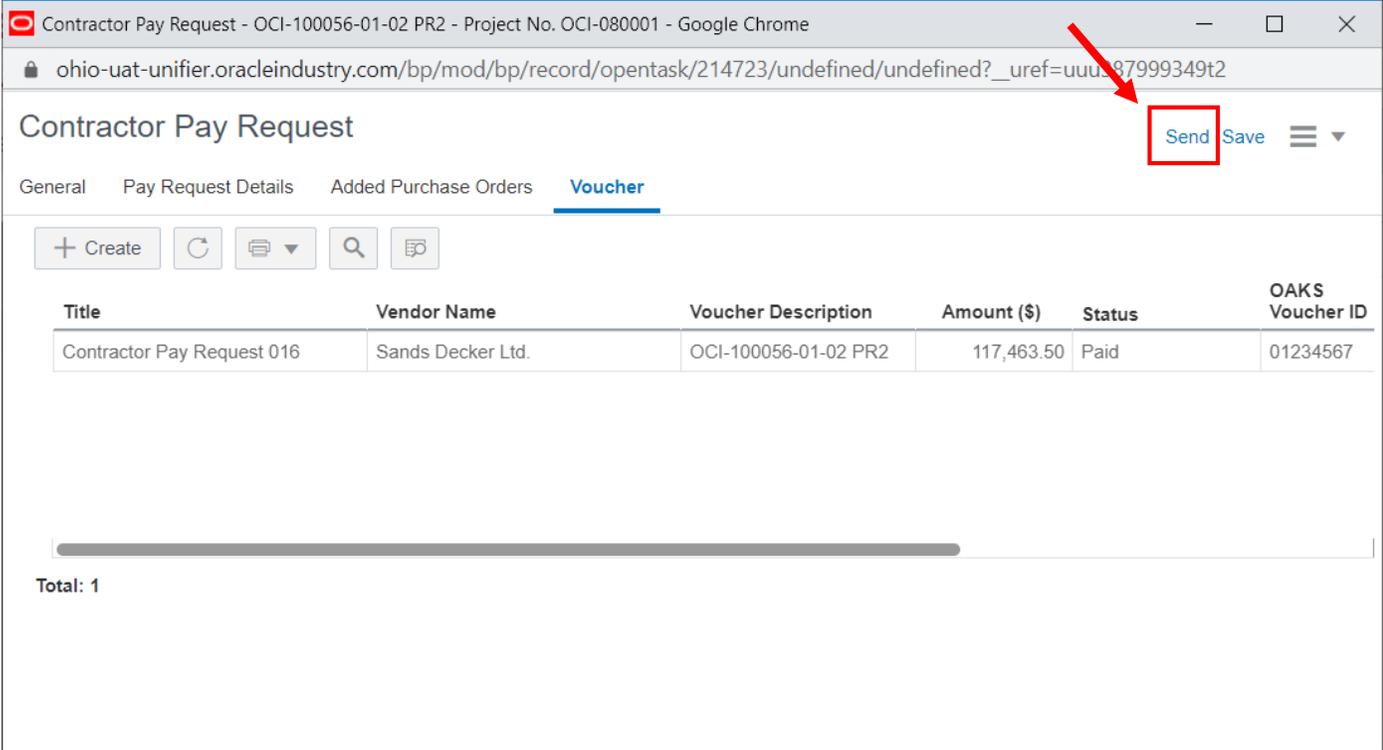
Attach

Information



# Complete Payment Processing Step

- 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/214723/undefined/undefined?\_uref=uuu.87999349t2". The page title is "Contractor Pay Request". There are tabs for "General", "Pay Request Details", "Added Purchase Orders", and "Voucher". Below the tabs are buttons for "+ Create", a refresh icon, a dropdown menu, a search icon, and a print icon. A table with the following data is displayed:

Title	Vendor Name	Voucher Description	Amount (\$)	Status	OAKS Voucher ID
Contractor Pay Request 016	Sands Decker Ltd.	OCI-100056-01-02 PR2	117,463.50	Paid	01234567

Below the table, there is a "Total: 1" label. In the top right corner of the page, there are buttons for "Send" (highlighted with a red box and a red arrow), "Save", and a menu icon.



# Complete Payment Processing Step

- Verify the Workflow Action: **Vouchered**
- Click **Send**

Contractor Pay Request - OCI-100056-01-02 PR2 - Project No. OCI-080001 - Goo...  
ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214723/undefined/u...  
Workflow Action Details

▲ Action Details

Workflow Actions \*  
Vouchered

Send For  
End

CC  
Start typing for suggestions...

Cancel Send





# Submittal Creation

## Agency/Higher-Ed



# Purpose & Procedure

- ▶ The purpose of the Submittals BP is to provide a means for managing and tracking the various forms of submittals required for a successful construction project.
- ▶ The Submittals BP is used by contractors for the submission, review and approval of submittals as stipulated in the contract documents



# Roles & Responsibilities

## ▶ Contractor

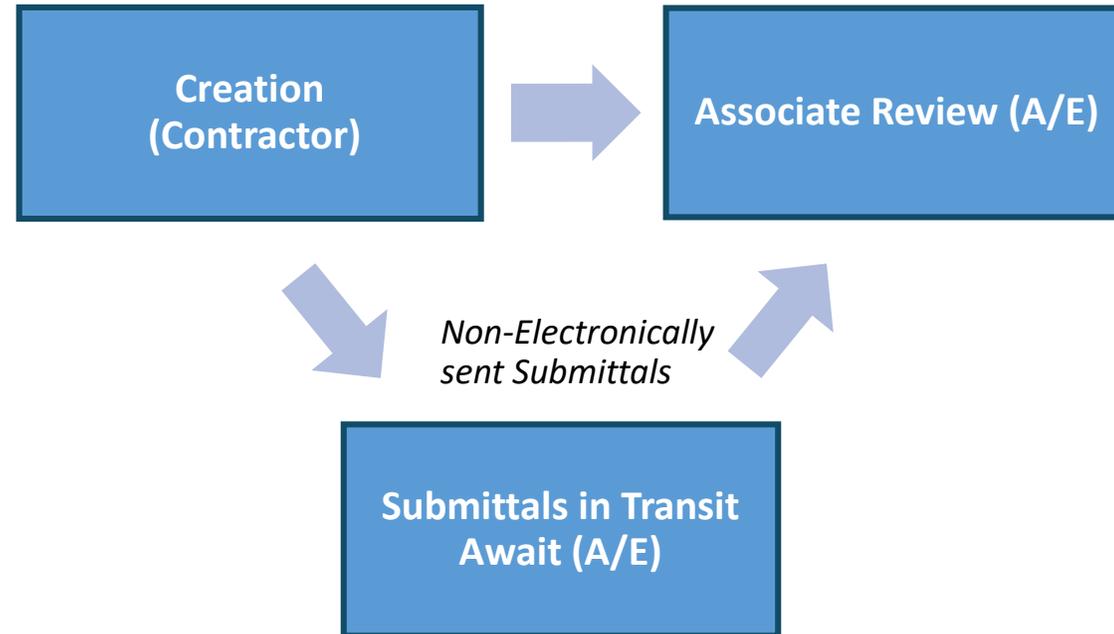
- ▶ Submits documents, samples, etc. to Associate (A/E) for conformance with contract documents

## ▶ Associate (A/E)

- ▶ Reviews the contractor submittals for conformance with contract requirements
- ▶ Advises contractors of submittals held for coordination of colors, patterns, etc.
- ▶ Returns incomplete or unacceptable submittals to the contractor
- ▶ Coordinates review of submittals with their consultants
- ▶ Advises Lead Contractor (non-CM projects) of submittal review status for scheduling purposes



# Submittals – Workflow Steps



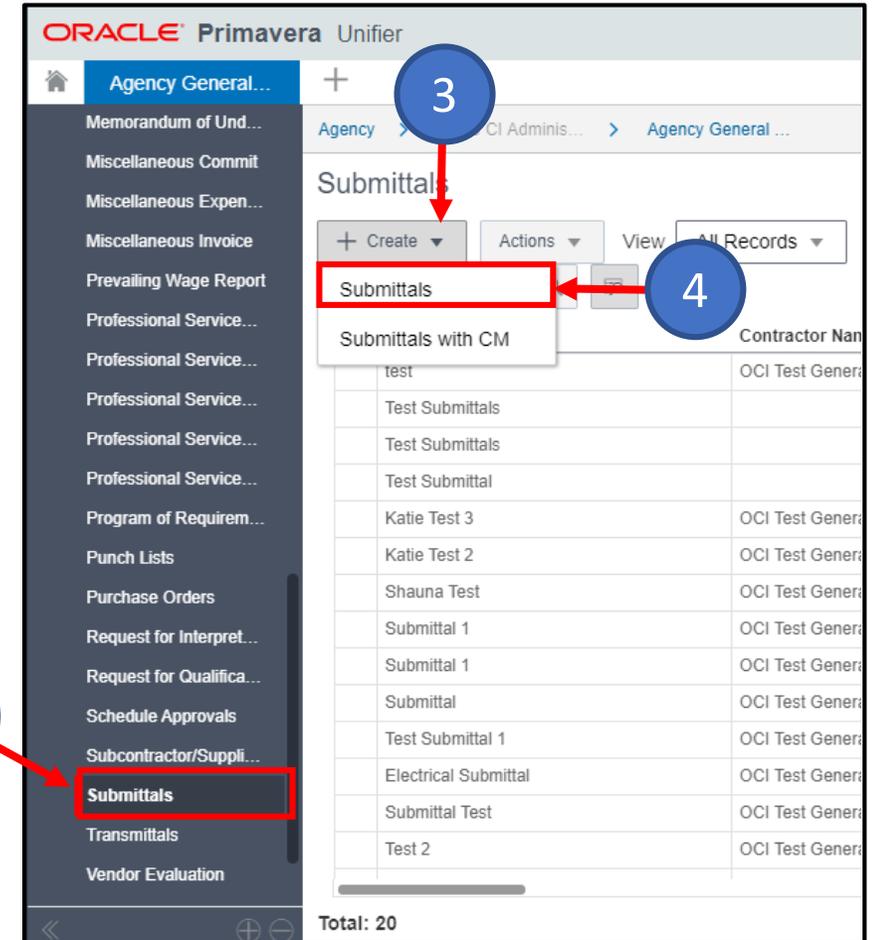
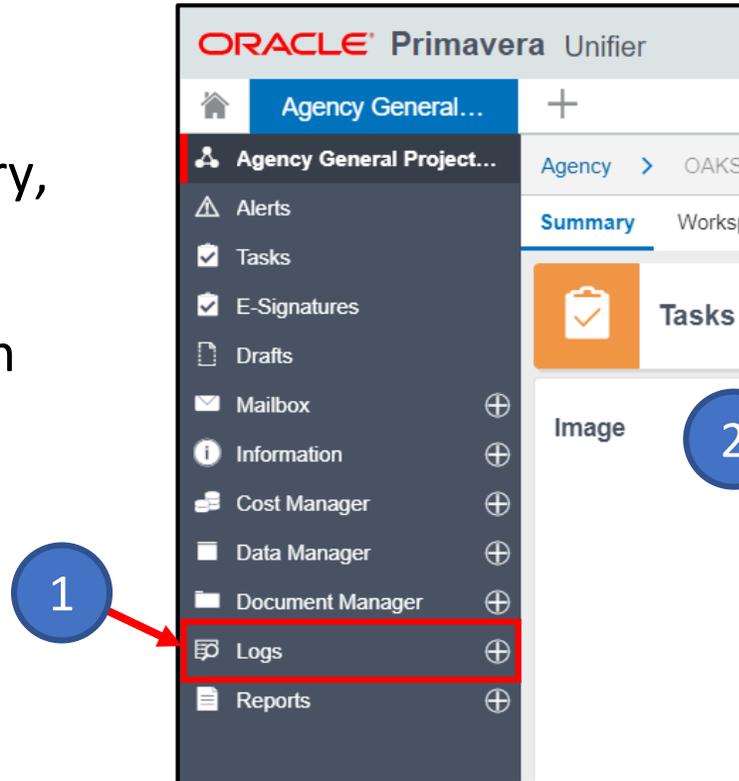
# Create Submittals (Contractor)



# Create Submittals

Log into OAKS CI and Follow these steps to Create a new record:

1. Click **Logs** to expand
2. Scroll down if necessary, Select **Submittals**
3. Click the **Create** button
4. Select **Submittals**



# Complete General Tab

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

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/us1/1003/1251?\_uref=uuu89827328t1

Create New Submittals

General Submittals List

Organization: OAKS CI Test

Record Number: [Empty]

Project Number: OCI-080001

Creator: Matthew Weber

Project Name: Agency General Projects Test

Creation Date: [Empty]

Project Location: OAKS CI Administration

Status: [Empty]

Title \*: Joe's Submittal 080001-02

Due Date: [Empty]

Contract Name: Joe's Contracting

Contract No.: OCI-080001-02

Contractor Name: OCI Test General

Drawing No.: [Empty]

Date Answer Requested: 04/28/2020 05:00 PM (UTC-5)

Specification Section: [Empty]

Notes

Notes: OAKS CI Submittal - Joe's Contracting

Comments

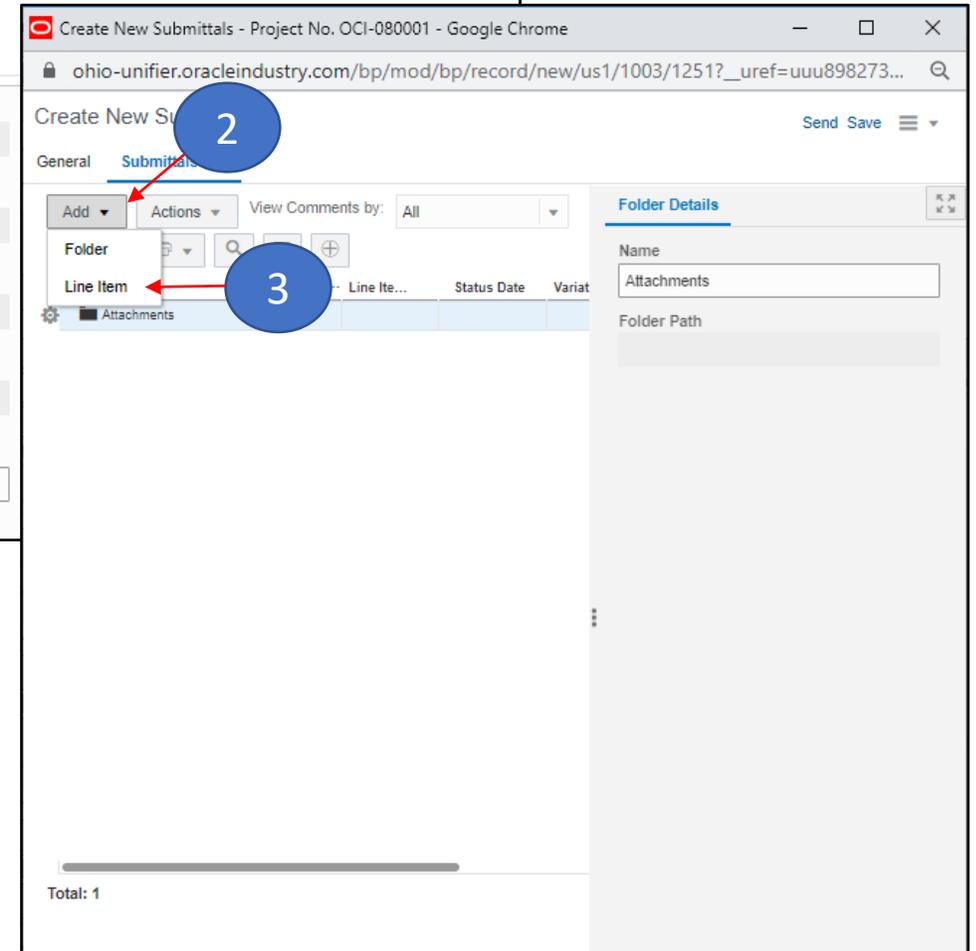
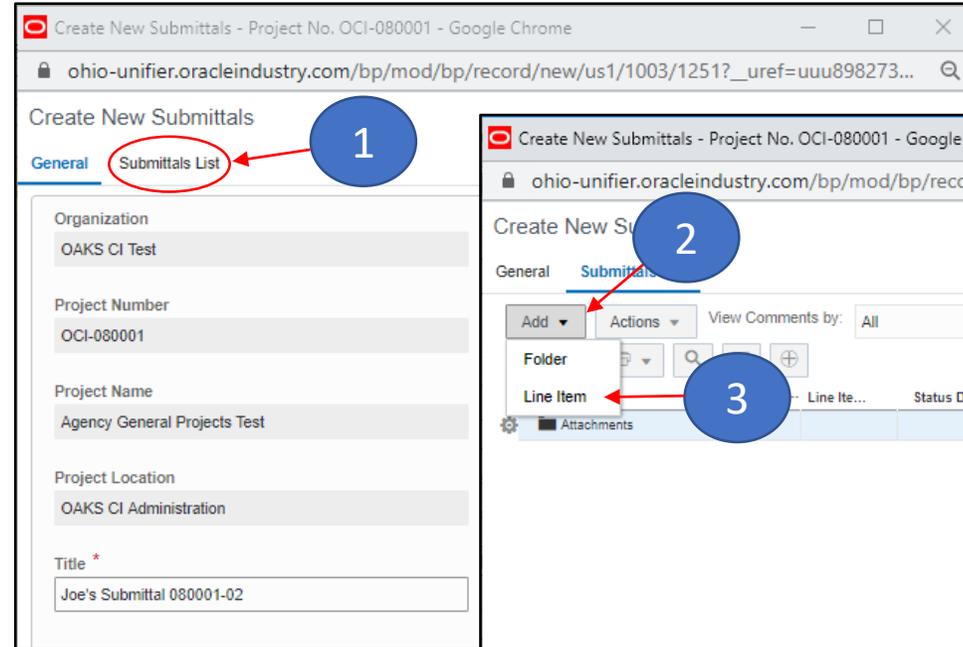
Information

No Comments are available.



# Add Line Items

1. Open **Submittals List**
2. Click **Add**
3. Select **Line Item**



# Submitting Samples by Mail

When sending the Submittal through the mail:

- a) In the top section fill out all fields as necessary
- b) Add **Sent Date** for Non-Electronic Submission
- c) Click **Save** or **Save & Add New**

The screenshot shows the 'Create New Submittals' form with the following fields and annotations:

- Annotation a:** A red bracket groups the top section of the form, including:
  - Name: Tile Color Sample
  - Date Answer Requested: 04/20/2020 05:00 PM (UTC-5)
  - How Was It Sent?: USPS - First Class
  - Type: Sample
  - Variation from Contract Documents? (checkbox)
  - Description of Variation (text area)
  - Line Item Status: Submitted
  - Status Date: 04/08/2020 05:00 PM (UTC-5)
- Annotation b:** A red box highlights the 'Sent Date' field in the 'Non-Electronic Submissions' section, with the value 04/08/2020 05:00 PM (UTC-5).
- Annotation c:** A red arrow points to the 'Save' button at the bottom right of the form.

Other visible fields include 'Received Date' (MM/DD/YYYY HH:MM AM) and 'Notes' (Samples for lobby).



# Submitting Samples Electronically

First ensure your documents have been uploaded to [Document Manger](#) before proceeding

## When submitting samples electronically:

### a) Complete all necessary fields on the form:

- ▶ Date Answer Requested, How Was it Sent, Type, and Status Date
- ▶ When applicable, select Variation from Contract Documents and provide a Description of Variation
- ▶ Line Item Status is set to Submitted but can be changed by from a drop-down list

a

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/us1/1003/1251?\_ure...

Create New Submittals Send Save

General **Submittals List**

Line Item Details

Name

Date Answer Requested  
04/20/2020 05:00 PM (UTC-5)

How Was It Sent?  
Other

Type  
Sample

Variation from Contract Documents?

Description of Variation

Line Item Status  
Submitted

Status Date  
04/09/2020 05:00 PM (UTC-5)

Non-Electronic Submissions

Sent Date  
MM/DD/YYYY HH.MM AM

Received Date  
MM/DD/YYYY HH.MM AM

Cancel Save Save & Add New



# Submitting Samples Electronically

First ensure your documents have been uploaded to [Document Manger](#) before proceeding

## b) Add an attachment to the Submittal:

- ▶ Click the attachment button
- ▶ Select **Document Manager**

The screenshot shows a web application interface for adding an attachment to a submittal. The interface is titled "Line Item Details" and includes tabs for "Attachments" and "Linked Records". The form contains the following fields:

- Name:** A text input field.
- Date Answer Requested:** A date and time picker showing "04/20/2020 05:00 PM (UTC-5)".
- How Was It Sent?:** A dropdown menu with "USPS - First Class" selected.
- Type:** A dropdown menu with "Sample" selected.
- Variation from Contract Documents?
- Description of Variation:** A text input field.

At the bottom of the form, there are three buttons: "Cancel", "Save", and "Save & Add New". A blue circle labeled "b" is positioned over the attachment button, and a red arrow points from it to the button. A red box highlights the text "Document Manager..." below the button.

# Adding Attachments in Document Manager

First ensure your documents have been uploaded to [Document Manger](#) before proceeding

- 1) Navigate to the folder 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 for adding attachments. The first screenshot shows a 'Select Files' dialog with a breadcrumb path 'Home > Project Documents > 0300 Constructi...'. A folder named '0375 Record Documents' is highlighted, and a red circle with the number '1' points to it. A red arrow points from this circle to the second screenshot. The second screenshot shows the same dialog with the breadcrumb path 'Home > Project Documents > 0300 Construction > 0375 Record Documents'. A table of files is displayed, with 'Tile Sample.png' highlighted. A red circle with the number '2' points to this file. A red arrow points from this circle to the 'Select' button in the bottom right corner of the dialog, which is circled in red. A red circle with the number '3' points to the 'Select' button.

Name	Location	Owner	Title	Revision...	Issue Date	Size
NEOSOV4.csv	/0300 Construction/...	Shauna Hooks				12 KB
sample.csv	/0300 Construction/...	Shauna Hooks				1 KB
sample.xls	/0300 Construction/...	Shauna Hooks				114 KB
Tile Sample.png	/0300 Constructio...	Matthew Weber				2 KB



# Submitting Samples Electronically

- ▶ The Name field will be automatically populated by the attached file
- ▶ Click **Save** or **Save and Add New**

Create New Submittals - Project No. OCI-080001...

ohio-unifier.oracleindustry.com/bp/mod/bp/record/ne...

Create New Submittals Send Save

General Submittals List

Line Item Details Attachments Linked Records

Name  
Tile Sample.png

Date Answer Requested  
04/20/2020 05:00 PM (UTC-5)

How Was It Sent?  
Other

Type  
Sample

Variation from Contract Documents?

Description of Variation

Line Item Status  
Submitted

Status Date  
04/09/2020 05:00 PM (UTC-5)

Cancel **Save** Save & Add New



# Submittal Record

- ▶ After saving, the details of your submittal record will be added to the Submittals List tab
- ▶ Once both the General and Submittals List sections are complete, click **Send** to submit the record

The screenshot displays the 'Create New Submittals' interface. The 'Submittals List' tab is active, showing a table with one row: 'Tile Sample.png' with status 'Submitted' and date '04/09/2020 05...'. The 'Line Item Details' section is also visible, containing fields for 'Name' (Tile Sample.png), 'Date Answer Requested' (04/20/2020 05:00 PM (UTC-5)), 'How Was It Sent?' (Other), and 'Type' (Sample). A red circle highlights the 'Send' button in the top right corner of the interface.

Name	Line It...	Status	Date
Attachments Tile Sample.png		Submitted	04/09/2020 05...

Total: 2

Line Item Details

Name: Tile Sample.png

Date Answer Requested: 04/20/2020 05:00 PM (UTC-5)

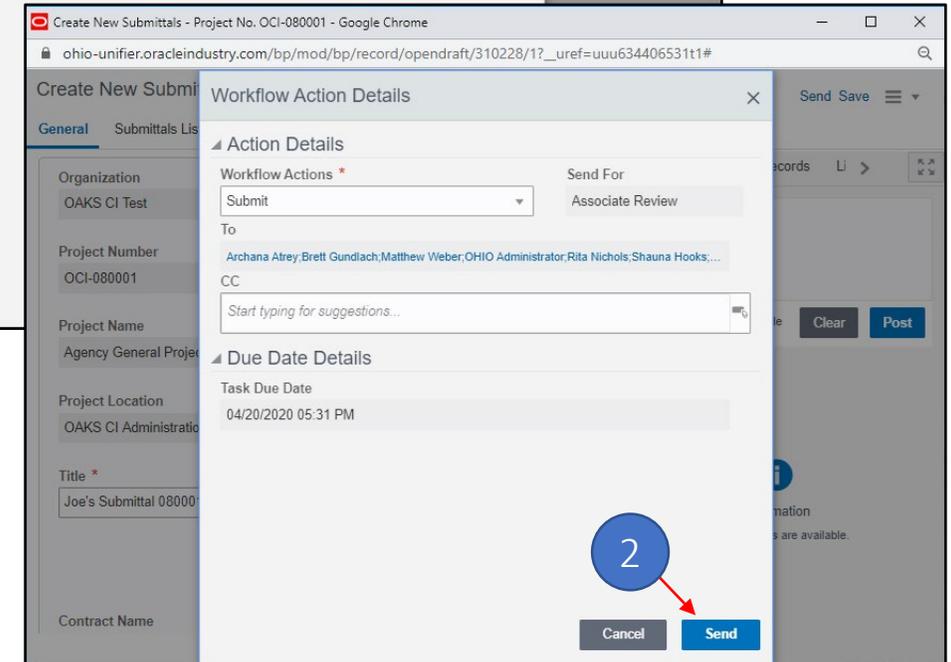
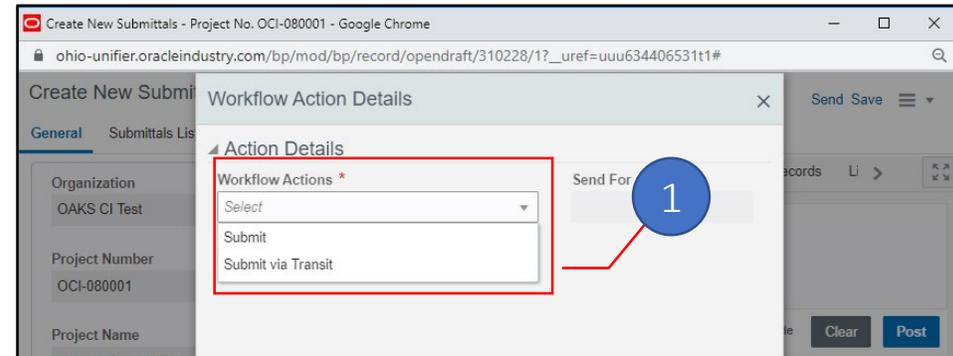
How Was It Sent?: Other

Type: Sample

Buttons: Cancel, Save, Save & Add New

# Send Record for Approval

- ▶ Select the Workflow Action:
  - ▶ Choose **Submit** if you sent the Submittal electronically. The record will move forward to A/E for Associate Review.
  - ▶ Choose **Submit via Transit** if the Submittal was sent through mail or courier. The record will move the forward to A/E for Submittals in Transit Await.
- ▶ Click **Send**





# **Submittal Review**

## Agency/Higher-Ed



# Purpose & Procedure

- ▶ The purpose of the Submittals BP is to provide a means for managing and tracking the various forms of submittals required for a successful construction project.
- ▶ The Submittals BP is used by contractors for the submission, review and approval of submittals as stipulated in the contract documents



# Roles & Responsibilities

## ▶ Contractor

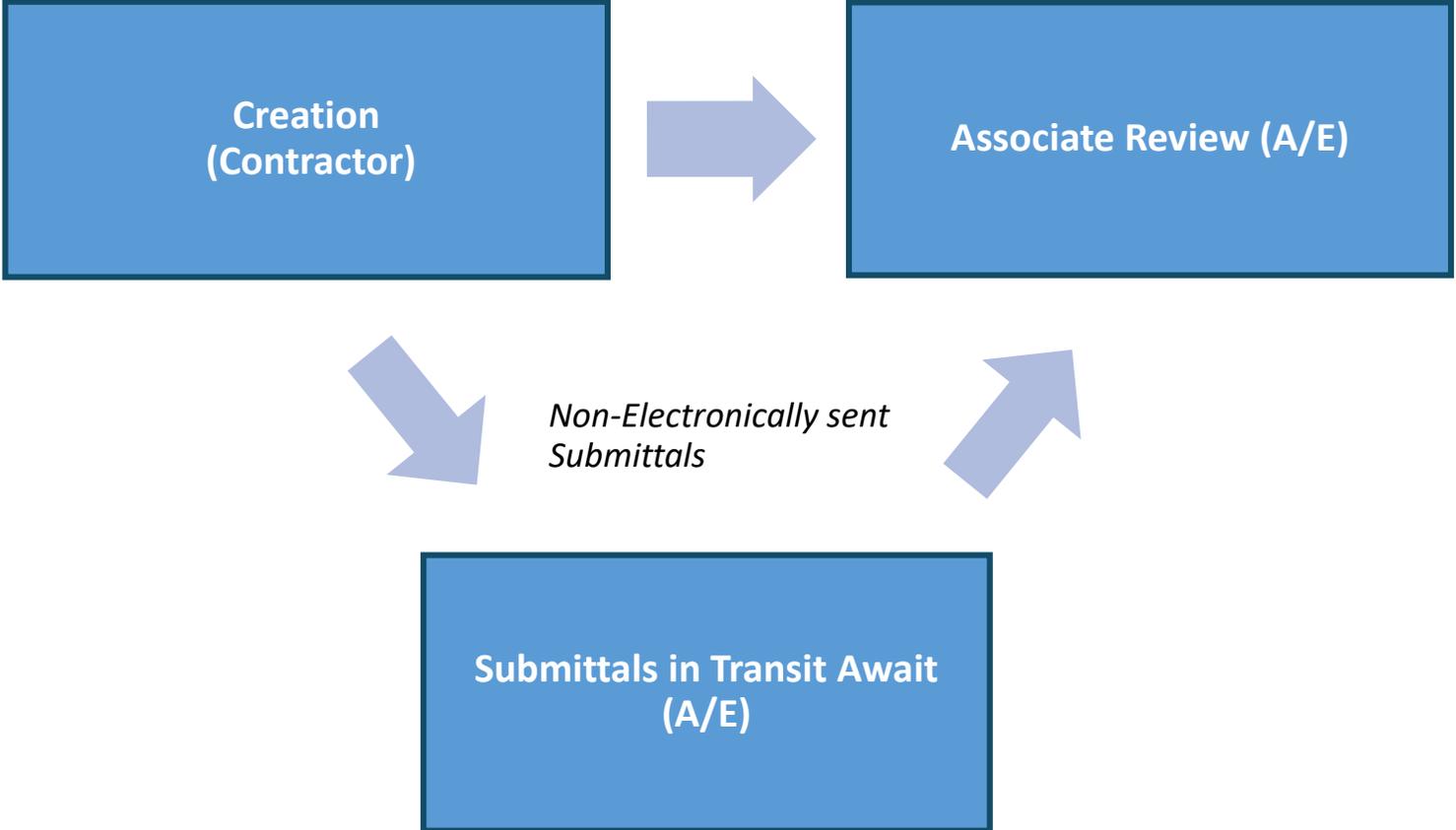
- ▶ Submits documents, samples, etc. to Associate (A/E) for conformance with contract documents

## ▶ Associate (A/E)

- ▶ Reviews the contractor submittals for conformance with contract requirements
- ▶ Advises contractors of submittals held for coordination of colors, patterns, etc.
- ▶ Returns incomplete or unacceptable submittals to the contractor
- ▶ Coordinates review of submittals with their consultants
- ▶ Advises Lead Contractor (non-CM projects) of submittal review status for scheduling purposes



# Submittals – Workflow Steps



# Submittals in Transit Await (A/E)



# Receive Task (A/E)

- ▶ A/E 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**

**Submittals SUB-0025 is sent to you for Submittals in Transit Await.**

From : Matthew Weber  
Sent For : Submittals in Transit Await

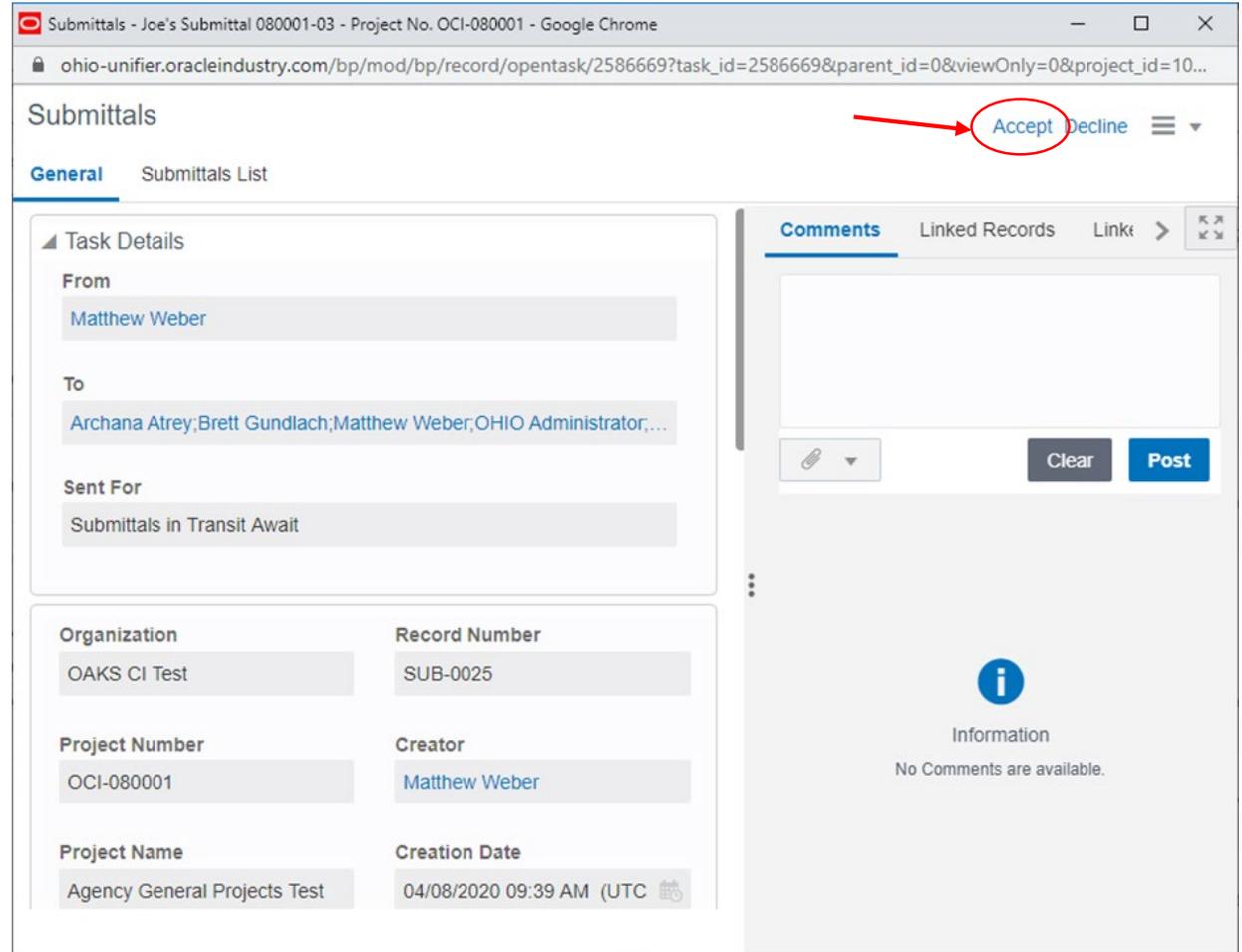
Source Name : Agency General Projects Test  
Record No : Submittals SUB-0025  
Title : Joe's Submittal 080001-03

[Unifier Login](#)



# Accept Task (A/E)

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



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

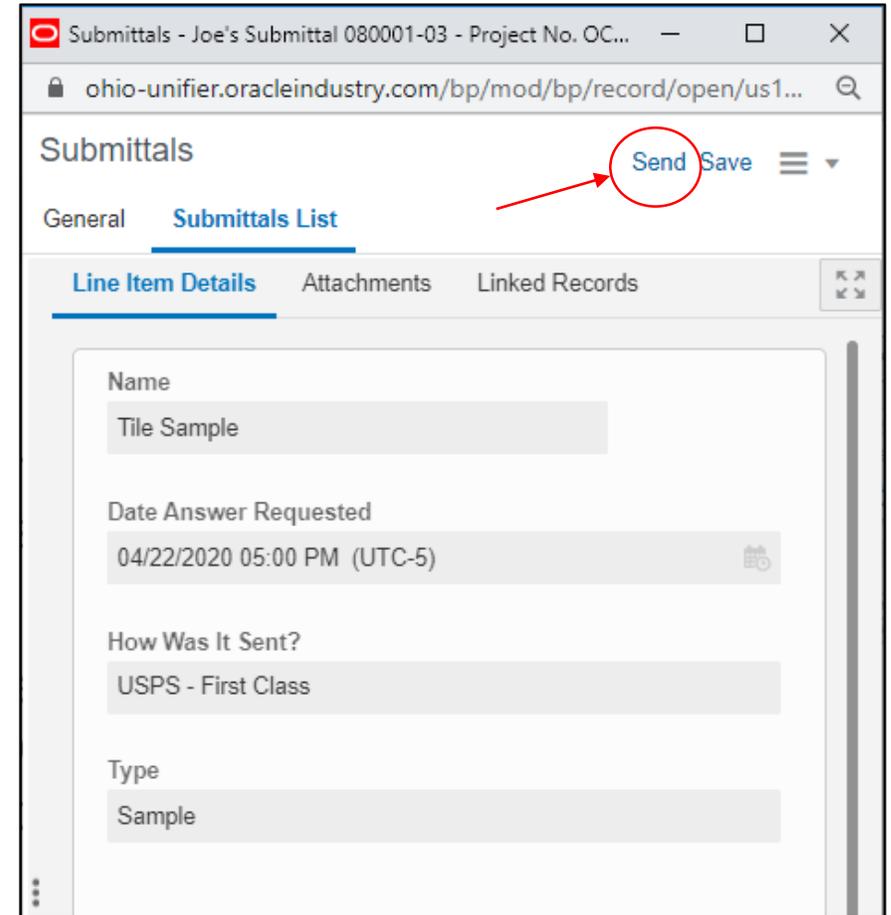
- Browser Tab:** Submittals - Joe's Submittal 080001-03 - Project No. OCI-080001 - Google Chrome
- URL:** ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2586669?task\_id=2586669&parent\_id=0&viewOnly=0&project\_id=10...
- Page Title:** Submittals
- Navigation:** "Accept" and "Decline" buttons are visible in the top right, with "Accept" circled in red and a red arrow pointing to it. A menu icon is also present.
- General Section:** "Submittals List" is selected. The "Task Details" section includes:
  - From:** Matthew Weber
  - To:** Archana Atrey; Brett Gundlach; Matthew Weber; OHIO Administrator; ...
  - Sent For:** Submittals in Transit Await
- Metadata Section:**

<b>Organization</b>	OAKS CI Test	<b>Record Number</b>	SUB-0025
<b>Project Number</b>	OCI-080001	<b>Creator</b>	Matthew Weber
<b>Project Name</b>	Agency General Projects Test	<b>Creation Date</b>	04/08/2020 09:39 AM (UTC)
- Comments Section:** "Comments" is selected. It shows "No Comments are available." with a "Post" button.



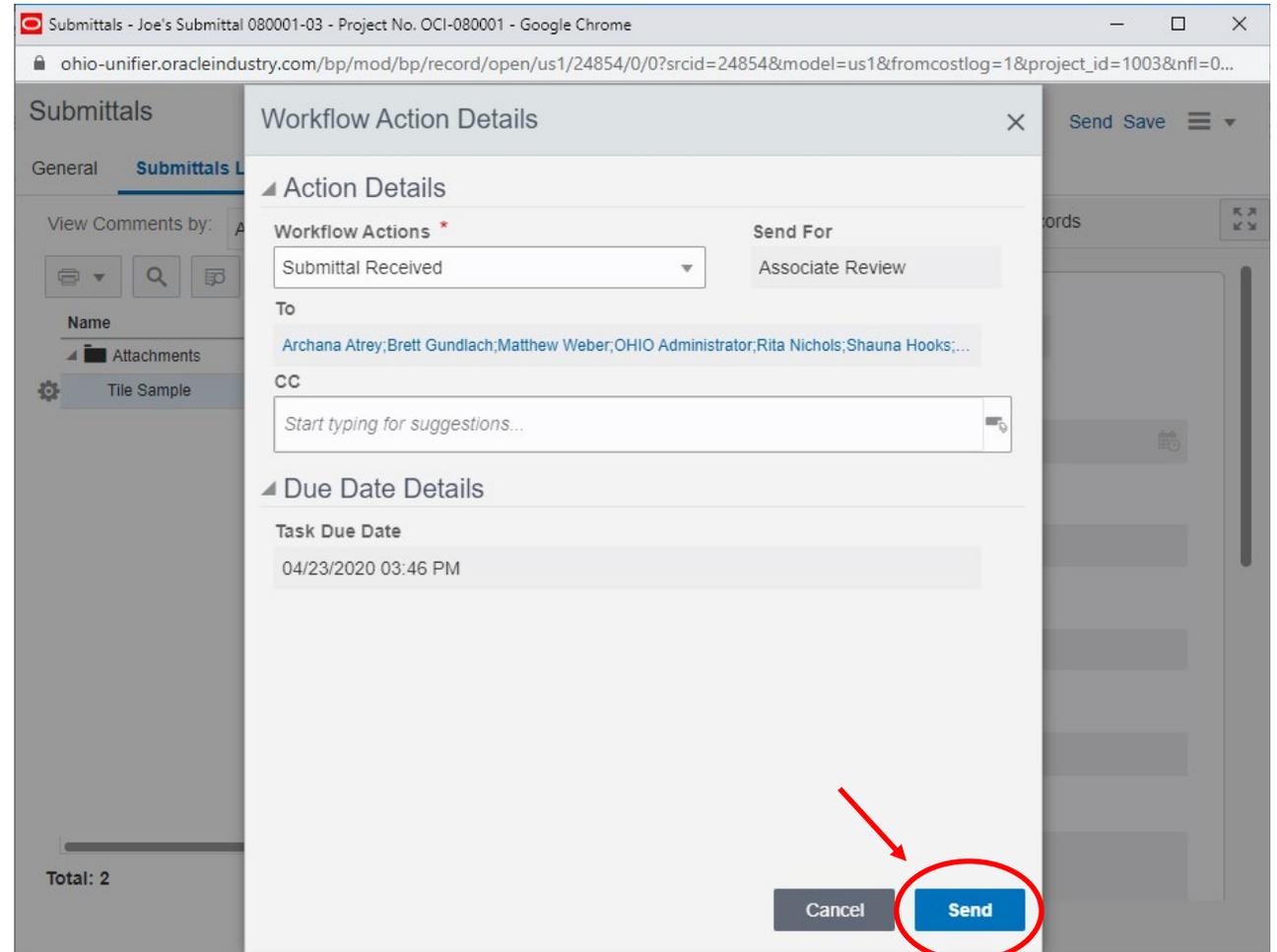
# Submittal Received

- ▶ The record will remain in this step until the submittal is received.
- ▶ **Do not send record forward until sample has been received**
- ▶ Once received, confirm by sending the record forward
  - ▶ Click the **Send** button in the top right corner of the record



# Send Record for Associate Review

- ▶ Verify the Workflow Action:
  - ▶ Submittal Received
- ▶ Click **Send**
  - ▶ The A/E will receive the record for the Associate Review step



# Associate Review (A/E)



# Receive Task – Associate Review (A/E)

- ▶ A/E 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.

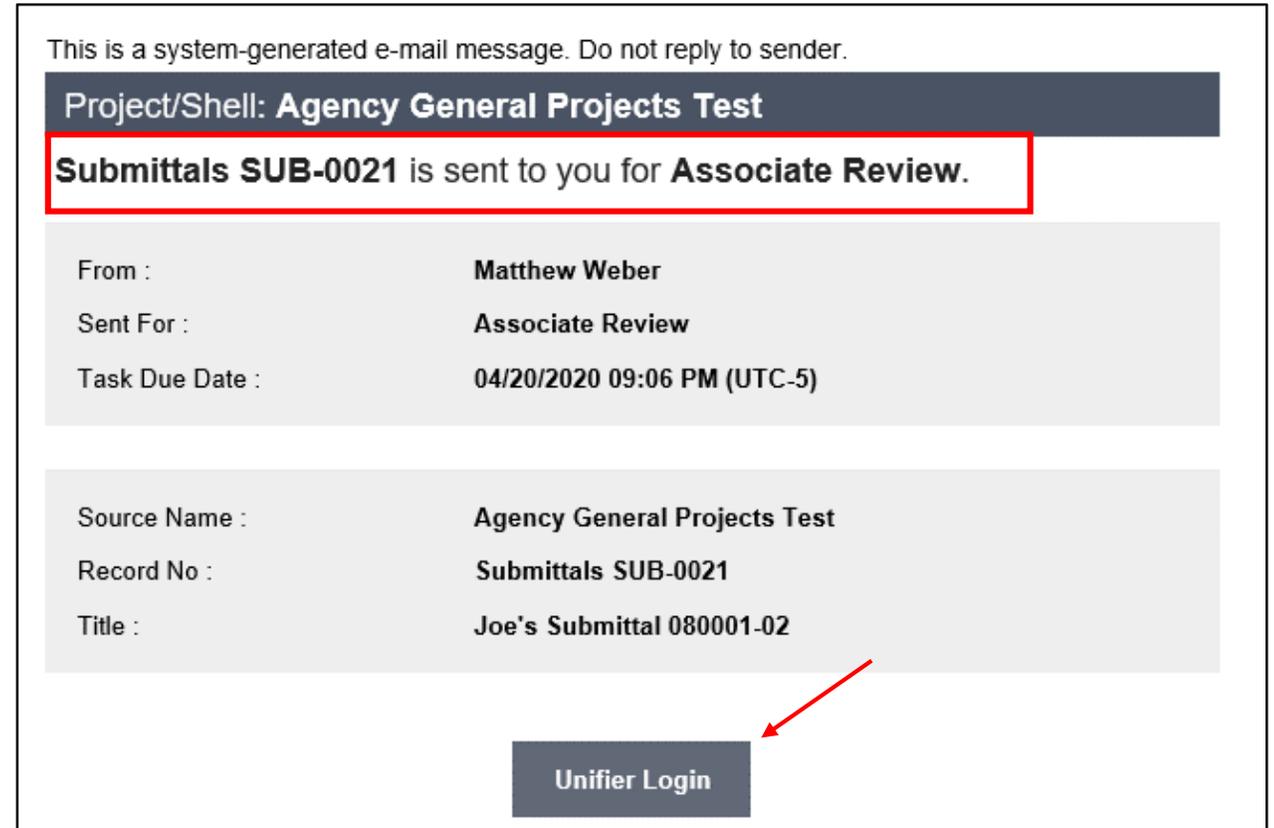
**Project/Shell: Agency General Projects Test**

**Submittals SUB-0021 is sent to you for Associate Review.**

From : Matthew Weber  
Sent For : Associate Review  
Task Due Date : 04/20/2020 09:06 PM (UTC-5)

Source Name : Agency General Projects Test  
Record No : Submittals SUB-0021  
Title : Joe's Submittal 080001-02

[Unifier Login](#)



# Accept Task – Associate Review (A/E)

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

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

- Browser Tab:** Submittals - Joe's Submittal 080001-02 - Project No. OCI-080001 - Google Chrome
- URL:** ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2584892?task\_id=2584892&parent\_id=0&viewO...
- Page Title:** Submittals
- Navigation:** General (selected), Submittals List
- Task Details:**
  - From:** Matthew Weber
  - To:** Archana Atrey; Brett Gundlach; Matthew Weber; OHIO Ad...
  - Sent For:** Submittals in Transit Await
- Metadata:**
  - Organization:** OAKS CI Test
  - Record Number:** SUB-0021
  - Project Number:** OCI-080001
  - Creator:** Matthew Weber
  - Project Name:** (empty)
  - Creation Date:** (empty)
- Comments Section:** Includes tabs for Comments, Linked Records, and Linked Mail. The 'Accept' button is circled in red, and a red arrow points to it from the right.
- Information Message:** A blue 'i' icon with the text "Information No Comments are available."



# Associate Review – Review Submittal (A/E)

- a) Review **General** tab
- b) Click **Submittals List** tab

The screenshot shows a web browser window displaying a submittal record. The browser title is "Submittals - Joe's Submittal 080001-02" and the URL is "ohio-unifier.oracleindustry.com/record/opendraft/310277/1?\_uref=uuu994980492t1". The page has two tabs: "General" and "Submittals List". The "Submittals List" tab is circled in red and labeled with a blue circle containing the letter "b". A red bracket labeled with a blue circle containing the letter "a" encompasses the main form area. The form contains the following fields:

Organization	Record Number
OAKS CI Test	SUB-0021
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	04/06/2020 09:00 PM (UTC-5)
Project Location	Status
OAKS CI Administration	Pending
Title	Due Date
Joe's Submittal 080001-02	
Contract Name	Contractor Name
Joe's Contracting	

On the right side, there is a "Comments" section with a "Post" button and a "Hide" checkbox. Below the comments is an information icon and the text "Information No Comments are available."



# Associate Review – Review Submittal (A/E)

- ▶ Select a Line Item from the Submittals List to view its details

The screenshot displays a web application interface for managing submittals. The main window shows a 'Submittals' list with columns for Name, Attachments, Status, Date, and Variations. A red arrow points to the 'Tile Sample.png' entry in the list. A modal window titled 'Line Item Details' is open on the right, showing the following information:

- Name: Tile Sample.png
- Date Answer Requested: 04/20/2020 05:00 PM (UTC-5)
- How Was It Sent?: Other
- Type: Sample
- Variation from Contract Documents?
- Description of Variation: (empty text box)

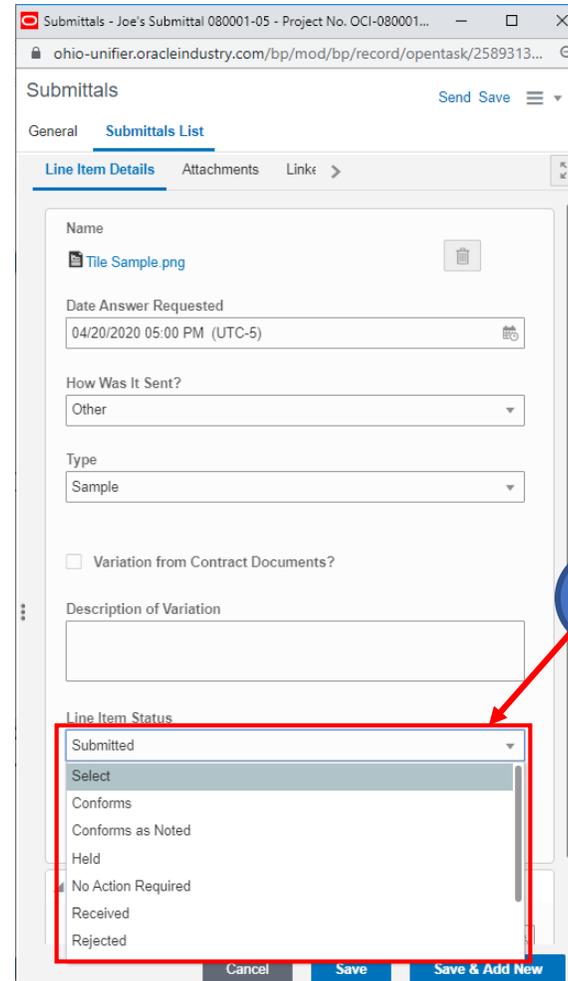
Buttons for 'Cancel' and 'Save' are visible at the bottom of the modal.



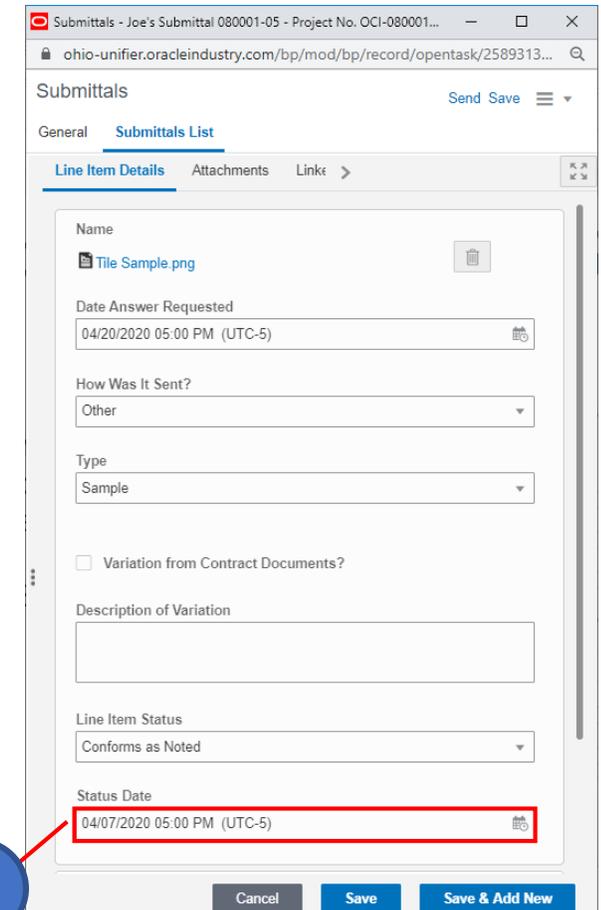
# Associate Review – Review Submittal (A/E)

▶ The default Line Item Status will be set to **Submitted**

- a) Change the status by clicking the line and selecting one of the options from the drop-down list
- b) Change the **Status Date**



This screenshot shows the 'Line Item Details' section of a submittal form. The 'Line Item Status' dropdown menu is open, displaying a list of status options: Submitted, Select, Conforms, Conforms as Noted, Held, No Action Required, Received, and Rejected. A red box highlights the dropdown menu, and a red arrow points from a blue circle labeled 'a' to the 'Submitted' option.



This screenshot shows the 'Line Item Details' section of a submittal form. The 'Line Item Status' is set to 'Conforms as Noted'. The 'Status Date' field is highlighted with a red box, and a red arrow points from a blue circle labeled 'b' to this field. The status date is '04/07/2020 05:00 PM (UTC-5)'.



# Associate Review – Review Submittal (A/E)

- c) If the submittal item is not attached to the record, record the **Received Date** of each item in the lower form Non-Electronic Submissions Block
- d) Click the **Save** button

The screenshot shows a software interface with the following elements:

- Line Item Status:** A dropdown menu with the selected value "Conforms as Noted".
- Status Date:** A date field containing "04/10/2020 05:00 PM (UTC-5)".
- Non-Electronic Submissions:** A section containing two date fields:
  - Sent Date:** "04/06/2020 05:00 PM (UTC-5)".
  - Received Date:** "04/10/2020 05:00 PM (UTC-5)". This field is highlighted with a red rectangular box.
- Notes:** A text area with a right-pointing arrow icon.
- Buttons:** "Cancel", "Save", and "Save & Add New". The "Save" button is highlighted with a red rectangular box.

Two blue circular callouts are present: one with the letter 'C' pointing to the "Received Date" field, and another with the letter 'd' pointing to the "Save" button.

# Associate Review – Review Submittal (A/E)

- ▶ After saving, you will see the updated Line Item Status and Status Date in the Submittals List section of the record
- ▶ When the all items have been updated and the record is ready to move forward, click **Send**

Submittals - Joe's Submittal 080001-05 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2589313/undefined/undefined?\_uref=uuu436200...

## Submittals

General **Submittals List**

Add Actions View Comments by: All

Name	Line Item	Status Date	Variations
Attachments			No
Tile Sample.png	Conforms a...	04/10/2020 05...	No

Total: 2

### Line Item Details

Attachmer

Name  
Tile Sample.png

Date Answer Requested  
04/20/2020 05:00 PM (UT)

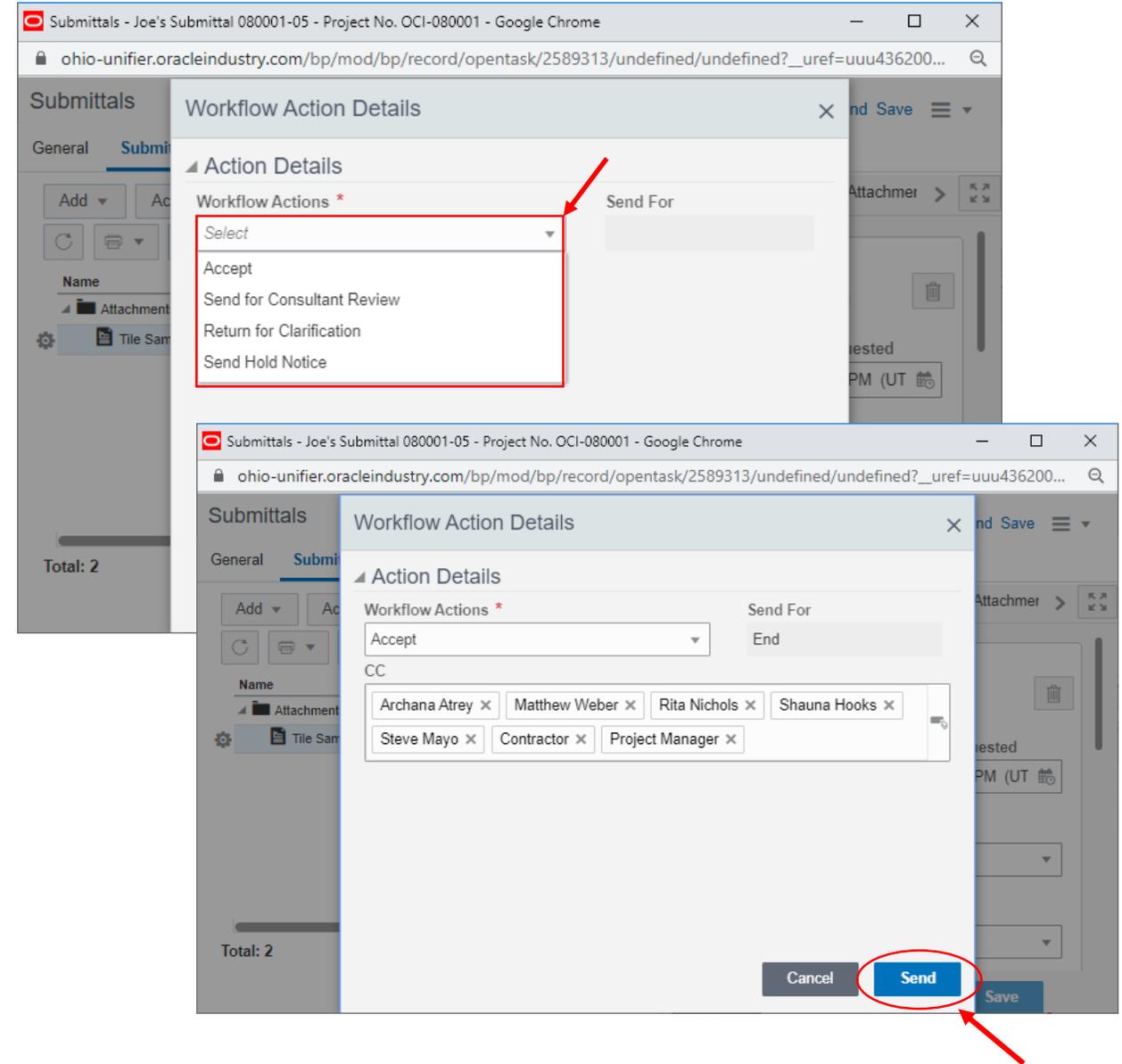
How Was It Sent?  
Other

Type  
Sample

Cancel Save

# Send Record

- ▶ Select the Workflow Action:
  - ▶ **Accept** will complete the workflow and end the record
  - ▶ **Send for Consultant Review** will send the record to a consultant to review the record. You will need to select the recipient from a list of consultants that have been given access to OAKS CI and your project. See job aid to
  - ▶ **Return for Clarification** will send the record back to Contractor for Update
  - ▶ **Send Hold Notice** will send the record to A/E and notify all project users of hold
- ▶ Click **Send**





# Requests for Interpretation (RFI)

## Agency/Higher-Ed



# Purpose & Procedure

- ▶ The purpose of the RFI is to seek an interpretation or clarification of the Contract Documents from the A/E
- ▶ Workflow:

Created by: Contractor → Sent to: A/E Review → Sent to: Contractor Acceptance → Sent to: A/E for Change Order Request or End



# Create RFI

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Requests for Interpretations
  - ▶ Click **Create**

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'ORACLE' and 'PRIMAVERA Unifier (Development)'. The breadcrumb trail is 'Agency > OAKS CI Training > OAKS CI Training 4'. The left sidebar menu is open, with 'Logs' circled in red. A red arrow points from the 'Request for Interpretations' menu item in the sidebar to the right-hand pane. In the right-hand pane, the 'Request for Interpretations' page is displayed, with the '+ Create' button circled in red. Below the button is a table of existing RFIs.

Record No.	Title
RFI-00050	Katie's RFI
RFI-00049	RFI- Test 4
RFI-00048	flooring
RFI-00047	afjkslajfsdki
RFI-00046	e
RFI-00045	RFI KRSM pinch what
RFI-00044	RFI-001
RFI-00043	How to handle RFI
RFI-00042	CHRIS
RFI-00041	I'm Confused
RFI-00040	Nate's RFI Test
RFI-00039	Colin
RFI-00038	Brian
RFI-00037	Irish Setter Dog Bed R
RFI-00036	Patrick
RFI-00035	RFI Test 5
RFI-00034	CYNTHIA
RFI-00033	courtney
RFI-00032	EE RFI
RFI-00031	debbie
RFI-00030	JEANNE
RFI-00029	Mike
RFI-00028	Carrie
RFI-00027	Kai
RFI-00026	Ben
RFI-00025	E RFI
RFI-00024	north high
RFI-00023	Geneva
RFI-00022	Conc Work
RFI-00021	title
RFI-00020	AHU 10
RFI-00019	Coffee In Stairwell
RFI-00018	Test
RFI-00017	RFI-0001 am i stupid
RFI-00016	training
RFI-00015	RFI Test
RFI-00014	RFI to go

Total: 50



# Create RFI Form

- ▶ Complete the General tab
- ▶ Enter a description of the RFI

Create New Request for Interpretations - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/urfi/1006/12?\_\_uref=uuu875301904t2

### Create New Request for Interpretations

Send Save

General Collaboration Collaboration

**General**

Organization  
Department of Administrative Services

Project Number  
OCI-080001

Project Name  
OAKS CI Training 1

Project Location  
Surface Road

Title \*  
RFI - Contract OFCC

Contractor Name \*  
Matt's Vendor

Associate (A/E) Name  
Sands Decker Ltd.

Date Answer Requested  
08/27/2020 05:00 PM (UTC-8)

Record Number

Creator  
Matthew Weber

Creation Date

Status

Contract No.  
12345

Drawing No.

Specification Section

Priority  
2 - High

**Description**

Interpretation/Clarification Requested \*  
Please clarify...

Linked Records Linked Mail

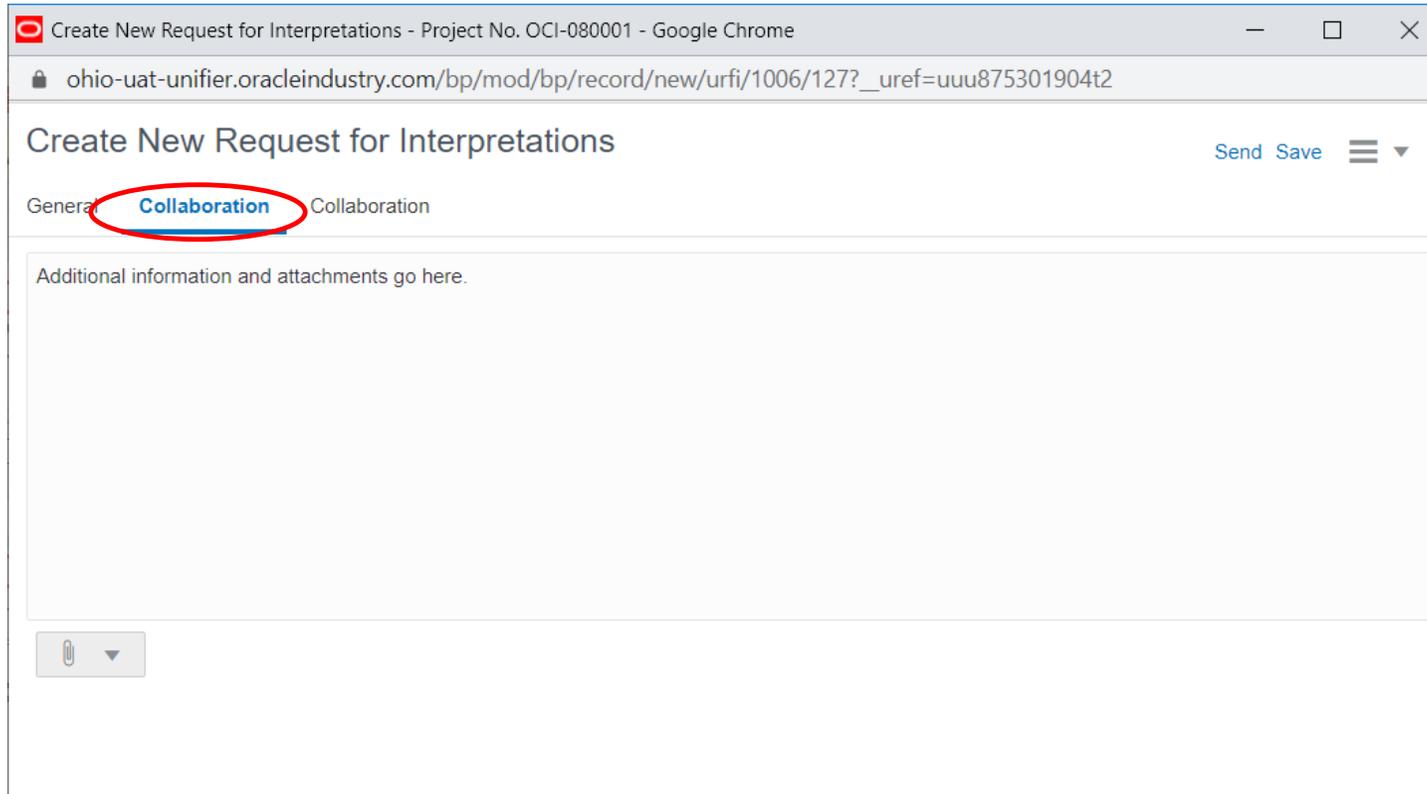
Add

Information  
No Linked Records.



# Create RFI Form

- ▶ Use the Collaboration tab to add additional comments as necessary



The screenshot shows a web browser window titled "Create New Request for Interpretations - Project No. OCI-080001 - Google Chrome". The address bar contains the URL "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/urfi/1006/127?\_uref=uuu875301904t2". The page title is "Create New Request for Interpretations". Below the title, there are "Send" and "Save" buttons, and a menu icon. The form has two tabs: "General" and "Collaboration". The "Collaboration" tab is selected and highlighted with a red circle. Below the tabs, there is a large text area with the placeholder text "Additional information and attachments go here." and an attachment icon at the bottom left.

# Sending RFI for A/E Review

- ▶ Click **Send**
- ▶ Verify Workflow Action: **Send for Response**
- ▶ The (To) field will automatically populate
- ▶ Click **Send**

The screenshot displays the 'Create New Request for Interpretations' form in Oracle Primavera. The 'Send' button is highlighted with a red box and a red arrow. A 'Workflow Action Details' dialog box is open, showing the following details:

- Action Details:**
  - Workflow Actions: Send For Response
  - Send For: Associate Review
- To:** Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant Student10; Consult...
- CC:** Start typing for suggestions...
- Due Date Details:**
  - Task Due Date: 08/09/2020 10:23 AM
  - Set all task due date as: 08/09/2020 10:23 AM
  - Set Individual task due dates: (unselected)
- Table:**

Name	Company Name	Task Due Date
Consultant Student4	State of Ohio	08/09/2020 10:23 AM

The 'Send' button in the dialog box is highlighted with a red box and a red arrow.



# A/E Step– Task Notification

- ▶ Once the RFI is submitted for response, the AE will receive a Task notification
- ▶ 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 Training 1**

**Request for Interpretations RFI-00082 is sent to you for Associate Review.**

From : **Matthew Weber**  
Sent For : **Associate Review**  
Task Due Date : **08/09/2020 10:27 AM (UTC-8)**

Source Name : **OAKS CI Training 1**  
Record No : **Request for Interpretations RFI-00082**  
Title : **RFI - Contract OFCC**

[Unifier Login](#)



# A/E Review and Response

- ▶ Click Accept Task to begin work on the record

The screenshot shows a web browser window with the title 'Request for Interpretations - RFI - Contract OFCC - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/215825?task\_id=215825&viewOnly=0&project\_id=0&\_uref=uuu...'. The page title is 'Request for Interpretations'. In the top right corner, there are two buttons: 'Accept' and 'Decline'. The 'Accept' button is circled in red, and a red arrow points to it from the right. Below the title, there are tabs for 'General' and 'Collaboration'. The 'General' tab is active. The main content area is divided into two columns. The left column contains fields for 'To' (Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant S...), 'Sent For' (Associate Review), and 'Task Due Date' (08/09/2020 10:27 AM (UTC-8)). The right column contains tabs for 'Linked Records', 'Linked Mail', and 'Workflow Pi'. The 'Linked Records' tab is active, showing an information icon and the text 'Information' and 'No Linked Records.' Below the 'General' tab, there is a 'General' section with a grid of fields: Organization (Department of Administrative Services), Record Number (RFI-00082), Project Number (OCI-080001), Creator (Matthew Weber), Project Name (OAKS CI Training 1), Creation Date (08/06/2020 10:27 AM (UTC-8)), Project Location (Surface Road), and Status (Open).



# A/E Review and Response

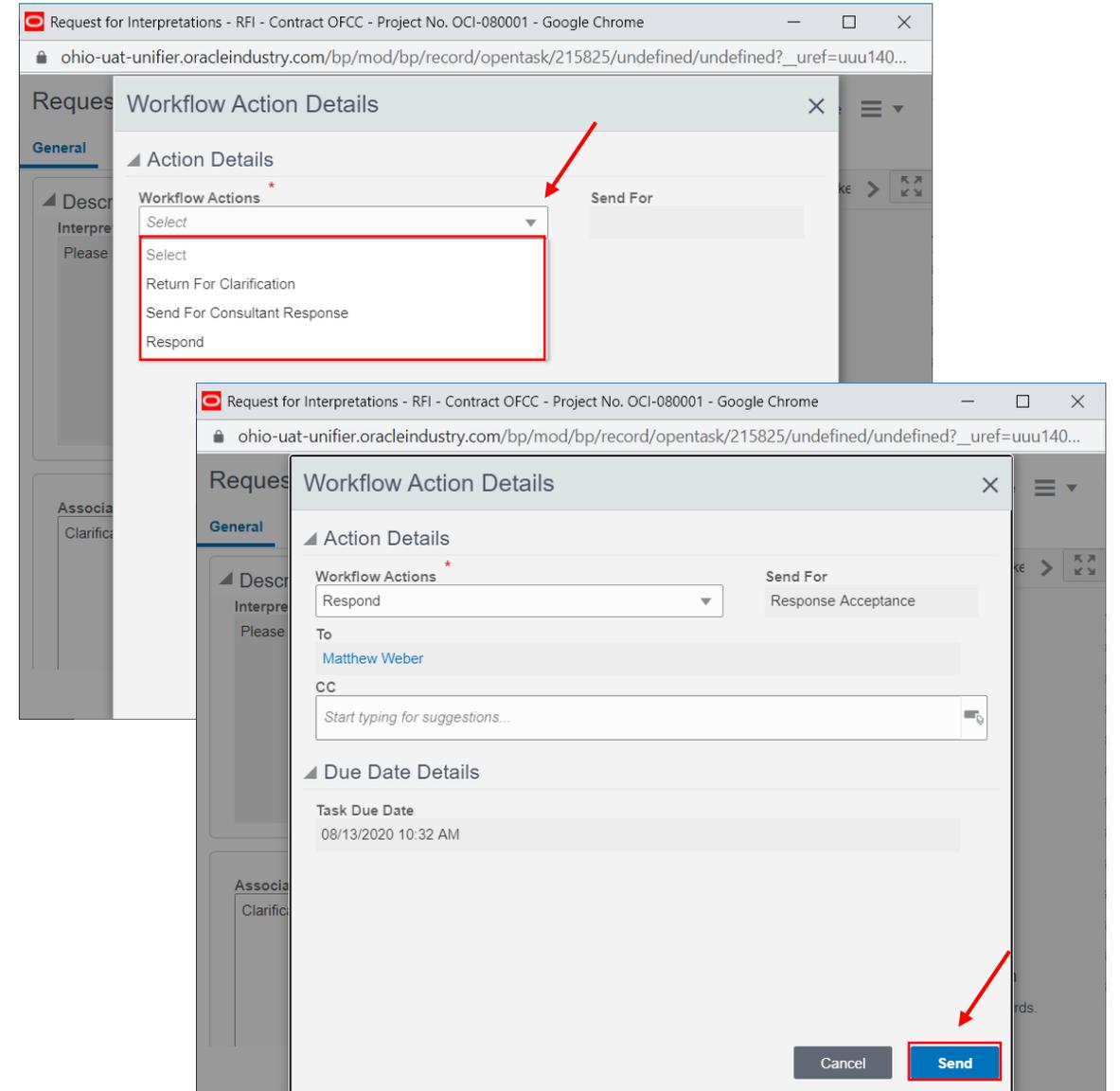
- ▶ Complete A/E Response section
- ▶ Add date for Change Order deadline
- ▶ Click **Send** when finished

The screenshot shows a web browser window with the title 'Request for Interpretations - RFI - Contract OFCC - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/215825/undefined/undefined?\_uref=uuu140434922t2'. The page title is 'Request for Interpretations'. In the top right corner, there are buttons for 'Send', 'Save', and a menu icon. A red arrow points to the 'Send' button. Below the title, there are tabs for 'General', 'Collaboration', and 'Collaboration'. The main content area is divided into sections: 'Description' with a text area containing 'Interpretation/Clarification Requested' and 'Please clarify...'; 'Associate (A/E) Response \*' with a text area containing 'Clarification example text.'; and 'Request for Change Order Deadline \*' with a date field containing '08/06/2020 05:00 PM (UTC-8)'. On the right side, there is a 'Linked Records' section with an 'Add' button and an 'Information' icon with the text 'Information No Linked Records.'



# A/E Review and Response

- ▶ Select Workflow Action
- ▶ Action Details section changes depending on Workflow Action
- ▶ Click **Send**



# Contractor Step- Task Notification

- ▶ Once the AE Review is complete, the Contractor will receive a Task for “Acceptance”
- ▶ 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 Training 1**

**Request for Interpretations RFI-00082 is sent to you for Response Acceptance.**

From : **Matthew Weber**  
Sent For : **Response Acceptance**  
Task Due Date : **08/13/2020 10:33 AM (UTC-8)**

Source Name : **OAKS CI Training 1**  
Record No : **Request for Interpretations RFI-00082**  
Title : **RFI - Contract OFCC**

[Unifier Login](#)



# Contractor Acceptance

- ▶ Click **Accept** to begin work

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

- Browser Tab:** Request for Interpretations - RFI - Contract OFCC - Project No. OCI-080001 - Google Chrome
- URL:** ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/215826?task\_id=215826&viewOnly=0&project\_id=0&\_uref=uuu811458...
- Page Title:** Request for Interpretations
- Navigation:** Accept (circled in red), Decline, and a menu icon.
- Task Details:**
  - From:** Matthew Weber
  - To:** Matthew Weber
  - Sent For:** Response Acceptance
  - Task Due Date:** 08/13/2020 10:33 AM (UTC-8)
- General Information:**

<b>Organization:</b> Department of Administrative Services	<b>Record Number:</b> RFI-00082
<b>Project Number:</b> OCI-080001	<b>Creator:</b> Matthew Weber
<b>Project Name:</b>	<b>Creation Date:</b>
- Right Panel:** Information icon, "Information", "No Linked Records."



# Contractor Acceptance

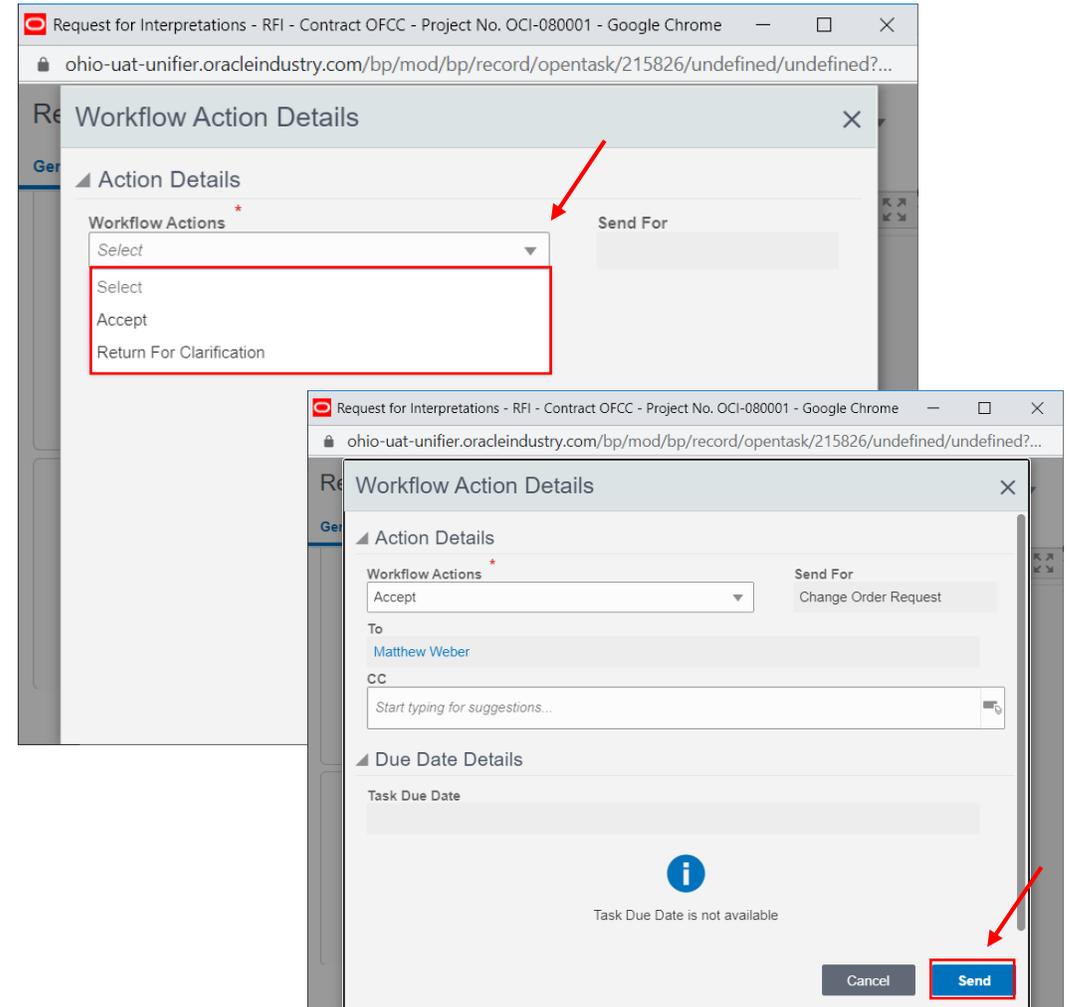
- ▶ Scroll down to Cost and Schedule Impact section
- ▶ Is there a change in cost or schedule? Choose Y/N
  - ▶ If Yes, enter the proposed cost and/or schedule impact
- ▶ When complete, click **Send**

The screenshot shows a web browser window with the title 'Request for Interpretations - RFI - Contract OFCC - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/215826/undefined/undefined?\_uref=uuu811458494t2'. The page title is 'Request for Interpretations'. There are tabs for 'General', 'Collaboration', and 'Collaboration'. A 'Send Save' button is highlighted with a red box and a red arrow. Below the tabs is a 'Linked Records' section with an 'Add' button. The main content area shows a 'Request for Change Order Deadline' with a date of '08/06/2020 05:00 PM (UTC-8)'. A red box highlights the 'Change in Cost or Time (Y/N) \*' dropdown menu (set to 'Yes'), and four input fields: 'Decrease in Cost of Approx. \$' (0.00), 'Increase in Cost of Approx. \$' (5,000.00), 'Decrease in time of (Days)' (0), and 'Increase in time of (Days)' (10). A blue dashed arrow points to the 'Information' icon in the bottom right corner.



# Contractor Acceptance

- ▶ Select Workflow Action
- ▶ Action Details section changes depending on Workflow Action
- ▶ Click **Send**



# Change Order Required?

- ▶ If there is no cost and/or time impact the workflow goes to the end step
- ▶ If there is a cost and/or time impact, the A/E will create a proposal request and submit to the Contractor for Cost Proposal



# How to Handle Stored Materials



# Pay Request Scenario

- ▶ Your company has a line on your SOV for \$400,000 worth of Light Switches in Material

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7471/1?\_\_uref=uuu150239568t2

### Create New Contract Schedule of Values

General **Contracts SOV Details**

No.	WBS Code	Code Name	Short Description	Amount (\$)	Subcon
004	CE-FS-26L	Electrical Labr	Light Switch Installation	500,000.00	
003	CE-FS-26M	Electrical Matl	Light Switches	400,000.00	
002	CE-FC-03L	Concrete Labr	Concrete Labor	650,000.00	Nelson
001	CE-FC-03M	Concrete Matl	Concrete Mix and Supplies	450,000.00	Nelson

Total: 4

Total Amount: 2,000,000.00

**Line Item Details**

WBS Code \*  
CE-FS-26M

Code Name  
Electrical Matl

Short Description \*  
Light Switches

EDGE Certified Prime Contractor?

Amount (\$) \*  
400,000.00

Subcontractor/Supplier  
Type a Subcontractor/Suppl...

Subcontractor/Supplier

EDGE Certified?

Cancel Save



# Billing % Materials Complete

- ▶ You have purchased and installed \$200,000 worth of the Light Switches and are ready to add this line to your pay request for January
- ▶ In the “Light Switches” line item, you will enter a short description and 50% in Materials Complete to account for this work, click **Save**

Ref.	SOV Reference Number	WBS Code	Code Name	Commit Short Description	Short Description *	Subcontractor...	Scheduled Value	% Labor Complete	% Materials Complete	% Services Complete
001	1	CE-FC-03M	Concrete Matl	Concrete Mix and...		Nelson Stark Co...	450,000.00	0.00	0.00	0.00
002	2	CE-FC-03L	Concrete Labr	Concrete Labor		Nelson Stark Co...	650,000.00	0.00	0.00	0.00
003	3	CE-FS-26M	Electrical Matl	Light Switches	Light Switches - Bldg A		400,000.00	0.00	50.00	0.00
004	4	CE-FS-26L	Electrical Labr	Light Switch Instal...			500,000.00	0.00	0.00	0.00
TOTAL							2,000,000.00	0.00	50.00	0.00

Total: 4

**NOTE:** This column (along with Labor Complete & Services Complete) will reflect dollar signs on the line items. These are not dollar amounts, they are percentages.



# Check Line Item

- ▶ You should have \$200,000 in Earned this Period and 50% in Materials Complete
  - ▶ *You will need to use the scroll bar at the bottom to view all the columns*
- ▶ Check to make sure you used a Material Line

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/5756?\_uref=uuu150239568t2

### Create New Contractor Pay Request

Send Save

General **Pay Request Details** Added Purchase Orders

Add [Icons]

Commit Short description	Short Description *	Subcont...	Scheduled Value	% Labor Complete	% Materials Complete
yht Switches	Light Switches, ...		400,000.00	0.00	50.00

Total: 1

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/5756?\_uref=uuu150239568t2

### Create New Contractor Pay Request

Send Save

General **Pay Request Details** Added Purchase Orders

Add [Icons]

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	0.00	200,000.00	200,000.00

Total: 1



# Send Pay Request

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

The image shows two overlapping screenshots of a web application. The top screenshot displays the 'Create New Contractor Pay Request' page with a red box around the 'Send' button and a red arrow pointing to it. The bottom screenshot shows a 'Workflow Action Details' dialog box with a red box around the 'Submit' option in the 'Workflow Actions' dropdown and a red arrow pointing to the 'Send' button at the bottom right.

**Workflow Action Details**

**Action Details**

**Workflow Actions \***

Submit

**Send For**

Associate Review

**To**

Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Student11;C...

**CC**

Start typing for suggestions...

**Due Date Details**

**Task Due Date**

Cancel Send



# Billing Stored Materials

- ▶ It is now time for your February billing. You have purchased and stored on-site the other \$200,000 worth of Light Switches.
- ▶ You now need to bill for those stored materials.

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu150239568t2

### Create New Contractor Pay Request

General **Pay Request Details** Added Purchase Orders Send Save

Cancel Error Check Save

SOV	Ref.	Referen... Number	WBS Code	Code Name	Commit Short Description	Short Descript...	Subcontracto...	Scheduled Value	% Labor Complete	% Materials Complete	% Services Complete	DPE or Reimbursable...	Material Stored OnSite This Period	Material Stored OffSite This Period
	001	1	CE-FC-03M	Concrete Matl	Concrete Mix and...		Nelson Stark Co...	450,000.00	0.00	0.00	0.00	0.00	0.00	0.00
	002	2	CE-FC-03L	Concrete Labr	Concrete Labor		Nelson Stark Co...	650,000.00	0.00	0.00	0.00	0.00	0.00	0.00
	003	3	CE-FS-26M	Electrical Matl	Light Switches	LS Bldg A		400,000.00	0.00	50.00	0.00	0.00	200,000.00	0.00
	004	4	CE-FS-26L	Electrical Labr	Light Switch Instal...			500,000.00	0.00	0.00	0.00	0.00	0.00	0.00
	TOTAL							2,000,000.00	0.00	50.00	0.00	0.00	200,000.00	0.00

Total: 4



# Billing Stored Materials

- ▶ On the left side, enter a short description on the “Light Switches” line
- ▶ On the right side, scroll over to locate the “Material Stored On Site this Period” column
- ▶ Enter the dollar amount of material you stored \$200,000

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu150239568t2

### Create New Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

Cancel Error Check Save

SOV	Referen...	WBS Code	Code Name	Commit Short Description	Short Descript...	Subcontracto...	Scheduled Value	% Labor Complete	% Materials Complete	% Services Complete	DPE or Reimbursable...	Material Stored On Site This Period	Material Stored Off Site This Period
	001	1 CE-FC-03M	Concrete Matl	Concrete Mix and...		Nelson Stark Co...	450,000.00	0.00	0.00	0.00	0.00	0.00	0.00
	002	2 CE-FC-03L	Concrete Labr	Concrete Labor		Nelson Stark Co...	650,000.00	0.00	0.00	0.00	0.00	0.00	0.00
	003	3 CE-FS-26M	Electrical Matl	Light Switches	LS Bldg A		400,000.00	0.00	50.00	0.00	0.00	200,000.00	0.00
	004	4 CE-FS-26L	Electrical Labr	Light Switch Instal...			500,000.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL							2,000,000.00	0.00	50.00	0.00	0.00	200,000.00	0.00

Total: 4



# Storing Materials

- ▶ The system will allow payment for 92% of your stored materials
- ▶ To see this amount, scroll on the right to the “Material Payment Allowed” column and note the amount, click OK

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu150239568t2

### Create New Contractor Pay Request

Send Save

General **Pay Request Details** Added Purchase Orders

Cancel Error Check Save

To Date	Previous Material	Materials This Period	Materials To Date	Previous Material Stored	Current Material Stored	Payment Allowed %	Material Payment Allowed	Pr Se
0.00	0.00	0.00	0.00	0.00	0.00	92.00	0.00	
0.00	0.00	0.00	0.00	0.00	0.00	92.00	0.00	
0.00	200,000.00	0.00	200,000.00	0.00	200,000.00	92.00	184,000.00	
0.00	0.00	0.00	0.00	0.00	0.00	92.00	0.00	

0.00	200,000.00	0.00	200,000.00	0.00	200,000.00	368.00	184,000.00	
------	------------	------	------------	------	------------	--------	------------	--

Total: 4



# Check Line Item

- ▶ You should have \$184,000 in Earned this Period which reflects the 92% you are being paid for storing those materials
- ▶ Check to make sure you used a Material Line

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?\_uref=uuu150239568t2

### Create New Contractor Pay Request

Send Save

General **Pay Request Details** Added Purchase Orders

Add [Icons]

ious ymb	DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period	EDGE Certified Prime Contractor?
0.00	0.00	0.00	200,000.00	384,000.00	184,000.00	No
0.00	0.00	0.00	200,000.00	384,000.00	184,000.00	

Total: 1



# Send Pay Request

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

The image shows two overlapping screenshots of the Oracle Pay Request system. The top screenshot displays the 'Create New Contractor Pay Request' page with the 'Send' button highlighted by a red box and a red arrow. The bottom screenshot shows the 'Workflow Action Details' dialog box, where the 'Submit' option is selected in the 'Workflow Actions' dropdown menu, also highlighted by a red box. A red arrow points to the 'Send' button at the bottom right of the dialog box. The background of the bottom screenshot shows the 'General' tab of the pay request form with fields for Organization, Project Name, Project Number, Project Location, and Title.



# Installing Stored Materials

- ▶ It is now time for your March billing. You have now installed the other \$200,000 of material that you stored in February
- ▶ You now need to bill for those installed materials

**NOTE:** If you want to install materials, you must have stored them on a previous pay request



# Installing Materials

- ▶ On the left, enter a Short Description on the “Light Switches” line
- ▶ Scroll to the right

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7490/1?\_uref=uuu306543895t2

### Create New Contractor Pay Request

Send Save

General **Pay Request Details** Added Purchase Orders

Cancel Error Check Save

Code Name	Commit Short Description	Short Description *	Subcontractor...	Scheduled Value	% Labor Complete	% Materials Complete
Concrete Matl	Concrete Mix and...		Nelson Stark Co...	450,000.00	0.00	0.00
Concrete Labr	Concrete Labor		Nelson Stark Co...	650,000.00	0.00	0.00
Electrical Matl	Light Switches	<b>Light Switches Complete</b>		400,000.00	0.00	50.00
Electrical Labr	Light Switch Instal...			500,000.00	0.00	0.00
				2,000,000.00	0.00	50.00

Total: 4



# Entering materials complete

- ▶ Enter \$200,000 under the “Materials Installed This Period” for the material that you installed
- ▶ Enter 100 into the “% Material Complete
- ▶ Click **Save**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7490/1?\_uref=uuu306543895t2

### Create New Contractor Pay Request

Send Save

General **Pay Request Details** Added Purchase Orders

Cancel Error Check Save

% Materials Complete	% Services Complete	DPE or Reimbursable...	Material Stored OnSite This Period	Material Stored OffSite This Period	Material Installed This Period
0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00
100.00	0.00	0.00	0.00	0.00	200,000.00
0.00	0.00	0.00	0.00	0.00	0.00
100.00	0.00	0.00	0.00	0.00	200,000.00

Total: 4



# Check Line Item

- ▶ You should have \$16,000 in Earned this Period and 100% in Materials Complete
- ▶ This amount reflects the remaining 8% owed to you for materials previously stored

Browser: Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome  
URL: ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7490/1?\_uref=uuu306543895t2

### Create New Contractor Pay Request

Send Save

General **Pay Request Details** Added Purchase Orders

Add [Icons]

DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period	EDGE Certified Prime Contractor?
0.00	0.00	384,000.00	400,000.00	16,000.00	No
0.00	0.00	384,000.00	400,000.00	16,000.00	

Total: 1



# Check Amounts

## ▶ NOTES:

- ▶ Current Earned and Total Amount blocks should match
- ▶ The **Earned this Period** column should NEVER reflect a negative amount

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7490/1?\_uref=uuu306543895t2

### Create New Contractor Pay Request

General **Pay Request Details** Added Purchase Orders

Add

DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period	EDGE Certified Prime Contractor?
0.00	0.00	384,000.00	400,000.00	16,000.00	No
0.00	0.00	384,000.00	400,000.00	16,000.00	

Total: 1

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7490/1?\_uref=uuu306543895t2

### Create New Contractor Pay Request

**General** Pay Request Details Added Purchase Orders

Attachn

#### Earned Current Request

Current Services	0.00	Current Material	200,000.00
Current Labor	0.00	Stored Materials	-184,000.00
Current DPE/Reimb	0.00		
Current Labor Total	0.00	Current Materials Total	16,000.00
		Current Earned	16,000.00



# Send Pay Request

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

The image shows two overlapping screenshots of the Oracle Fusion 'Create New Contractor Pay Request' interface. The top screenshot shows the main form with the 'Send' button highlighted by a red box and a red arrow pointing to it. The bottom screenshot shows the 'Workflow Action Details' dialog box, where the 'Workflow Actions' dropdown menu is set to 'Submit' (highlighted by a red box) and the 'Send' button at the bottom right is also highlighted by a red box and a red arrow.



# Key Points

- ▶ When billing for any material, make sure to use a Material Line
- ▶ Material that is stored on one pay request must eventually be installed on another pay request.
- ▶ Current Materials Stored should **NOT** be a negative number.
- ▶ Earned this Period should **NOT** be a negative number.
- ▶ Current Earned and Total Amount blocks should match



# Critical Notes About Change Orders



# Important Note

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

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

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

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



# Reference a Line when Deducting

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

Create New Change Order - Project No. OCI-080001 - Google Chrome  
ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uco/1006/3114?\_uref=uuu74520005...

Create New Change Order

General Line Item List

Add Actions

Line Item Details

No. Refer...

Reference  
Type a Reference No...

WBS Code \*  
Type CBS Code or Name...

Code Name

Short Description \*

Amount (\$) \* 0.00

EDGE Certified Prime Contractor?  
No

Subcontractor/Supplier  
Type a Subcontractor/Supplier...

Subcontractor/Supplier

Total Amount : 0.00  
Total: 0

Cancel Save Save & Add New

Click Select next to the Reference Line

Note: When deducting money, you must reference a line

Create New Change Order - Project No. OCI-080001 - Google Chrome  
ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uco/1006/3114?\_uref=uuu74520005...

Create New Change Order

General Line Item List

Add Actions

Line Item Details

No. Refer...

Reference  
4

WBS Code \*  
CE-FC-03L

Code Name  
Concrete Labr

Short Description \*  
concrete labor 3

Amount (\$) \* -15,000.00

EDGE Certified Prime Contractor?  
No

Subcontractor/Supplier  
Type a Subcontractor/Supplier...

Subcontractor/Supplier

Total Amount : 0.00  
Total: 0

Cancel Save Save & Add New



# Reviewing the Line Items

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

Create New Change Order - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uco/1006/3114?\_\_uref=uuu745200052t2

### Create New Change Order

Send Save

General **Line Item List**

Add Actions

No.	Reference	WBS Code	Code Name	Short Description
001	4	CE-FC-03L	Concrete Labr	concrete labor 3

**Correct**

#### Line Item Details

Attachments Linked R

**General**

Reference: 4

WBS Code \*: CE-FC-03L

Code Name: Concrete Labr

Short Description \*: concrete labor 3

Amount (\$) \*: -15,000.00

EDGE Certified Prime Contractor?: No

Subcontractor/Supplier: Type a Subcontractor/Supplier...

Cancel Save

Total: 1 Total Amount: -15,000.00



# Document Manager



# Uploading to Document Manager

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



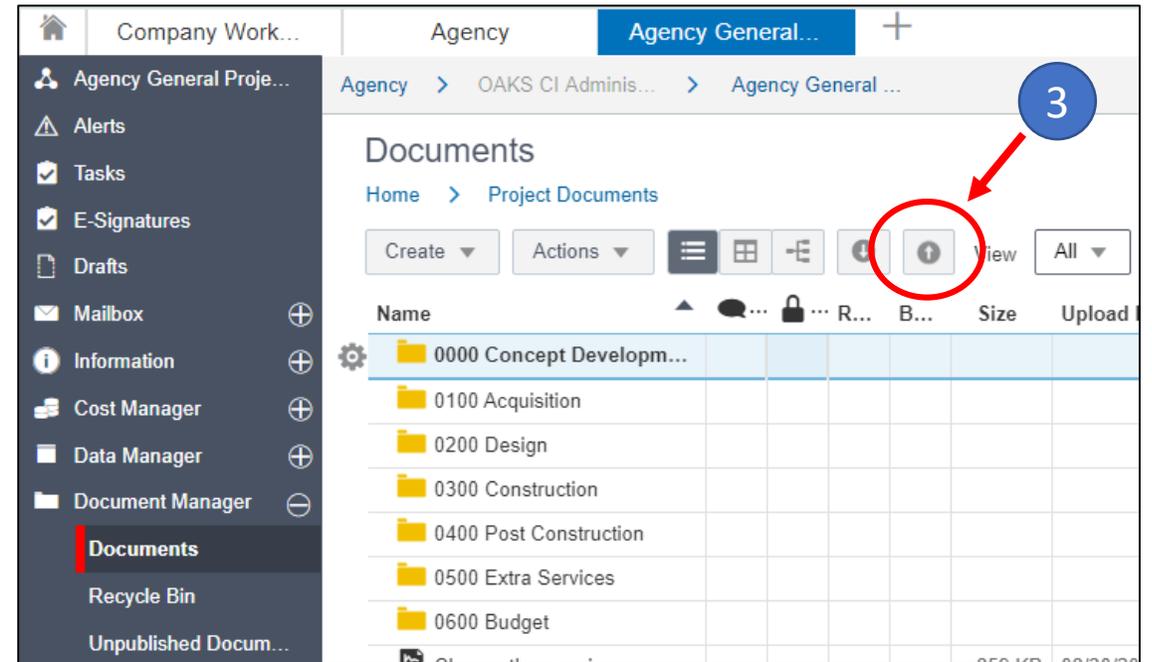
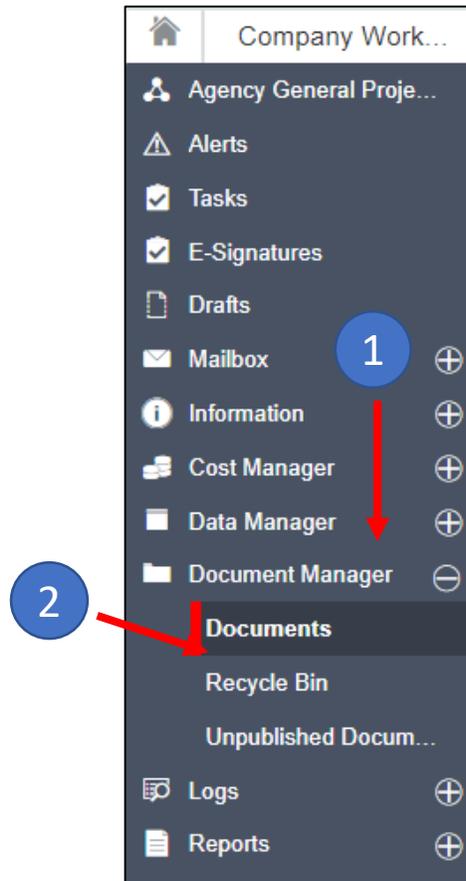
# About Document Manager

- ▶ 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



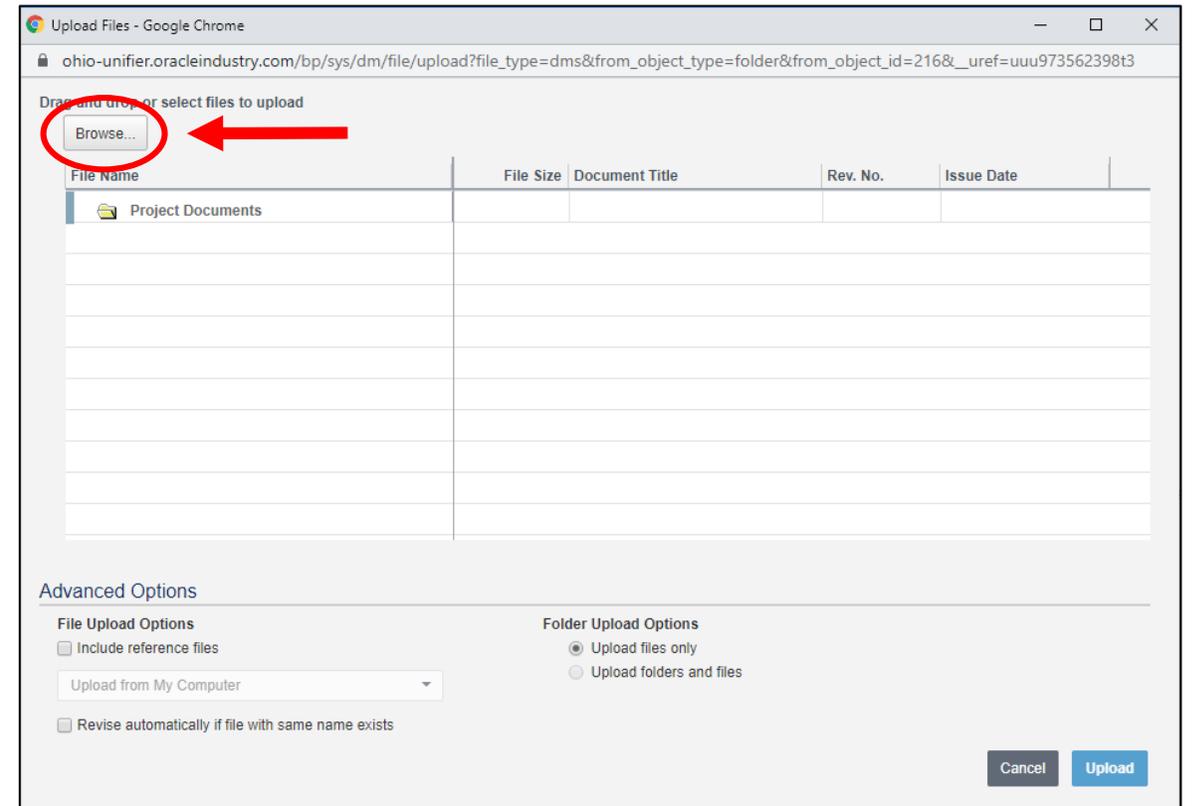
# Document Upload

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



# File Upload Window

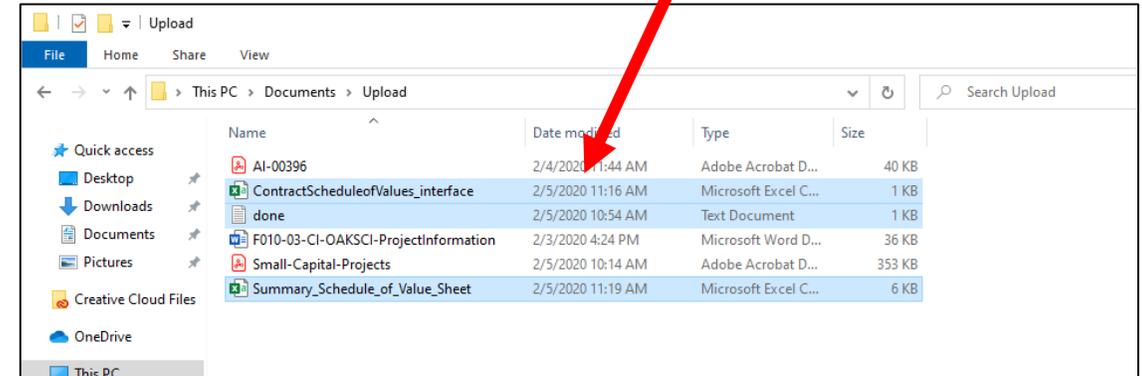
- ▶ A new window will appear for you to add files
- ▶ Click **Browse** to choose files for upload



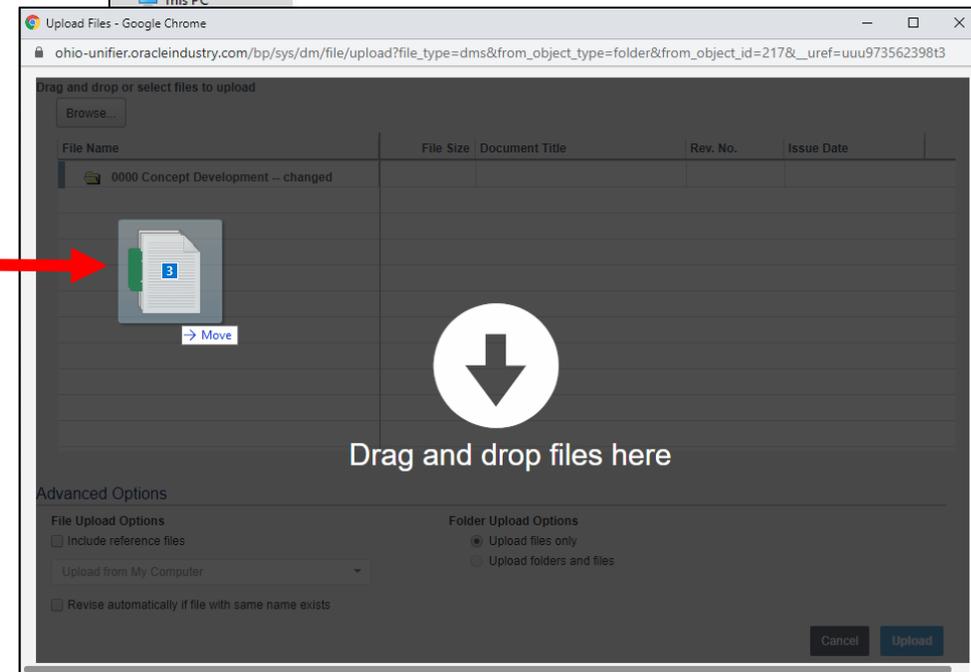
# Drag and Drop files

- ▶ 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

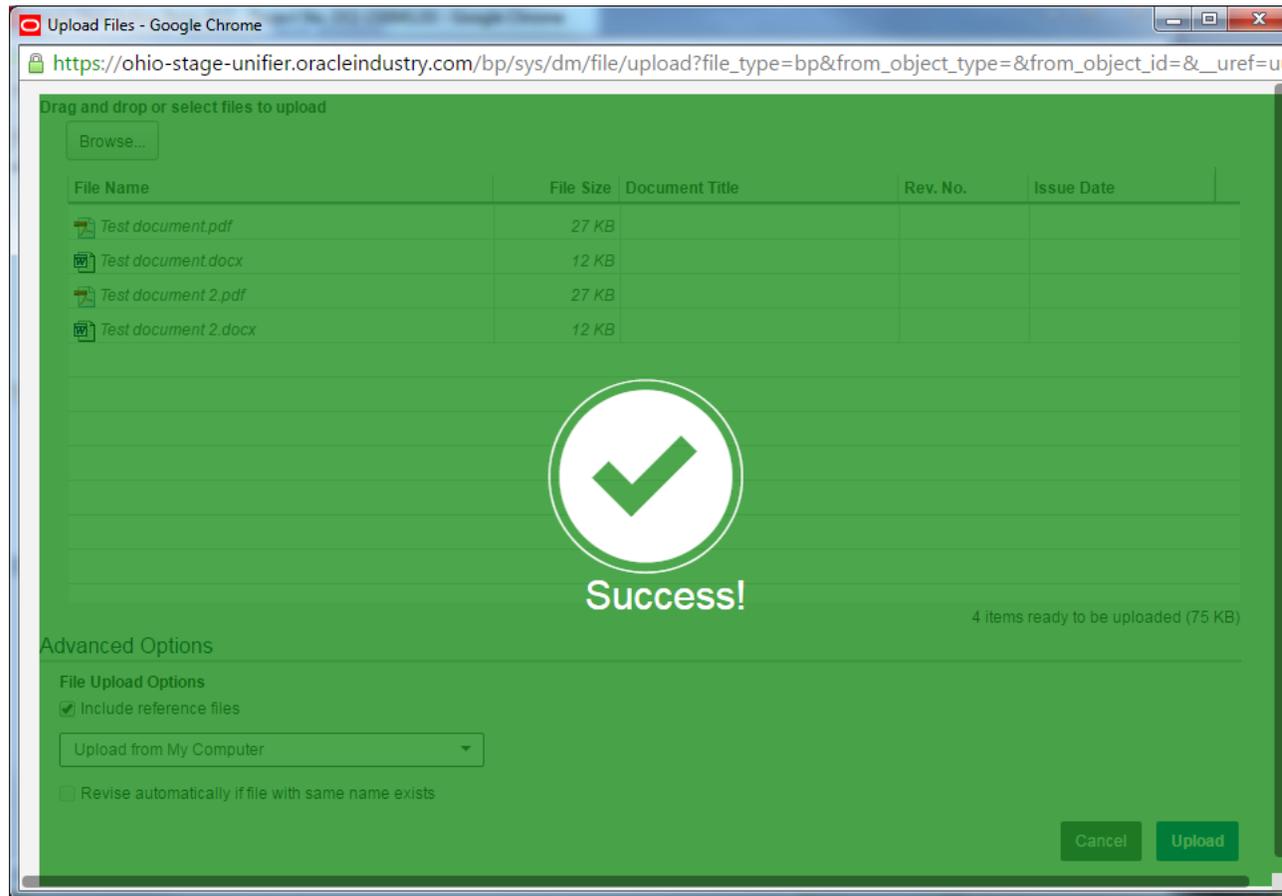


Drag and Drop the documents into the Upload Files window



# 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

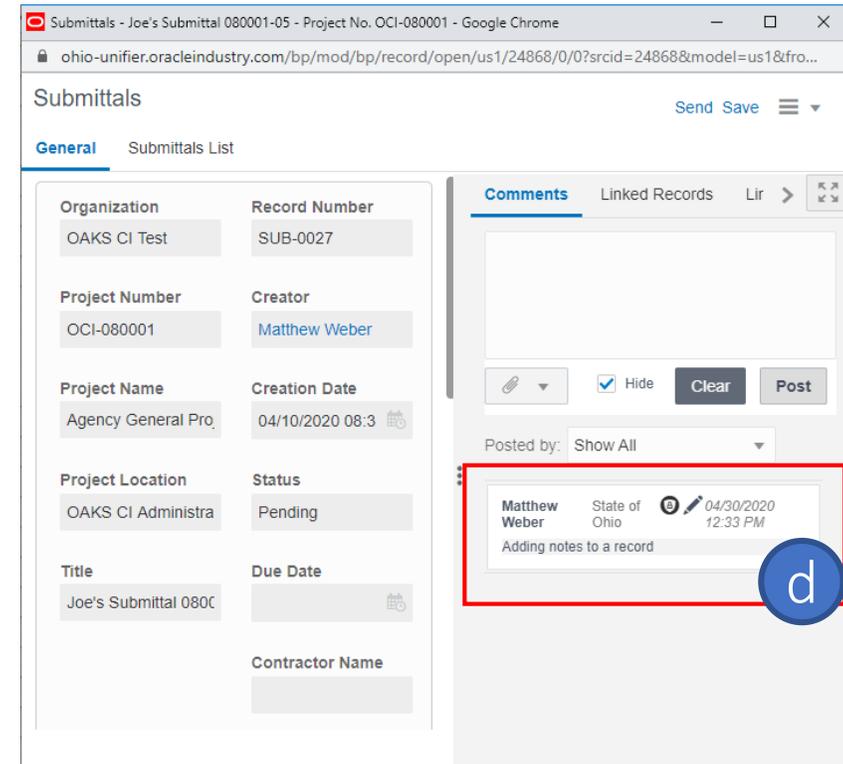
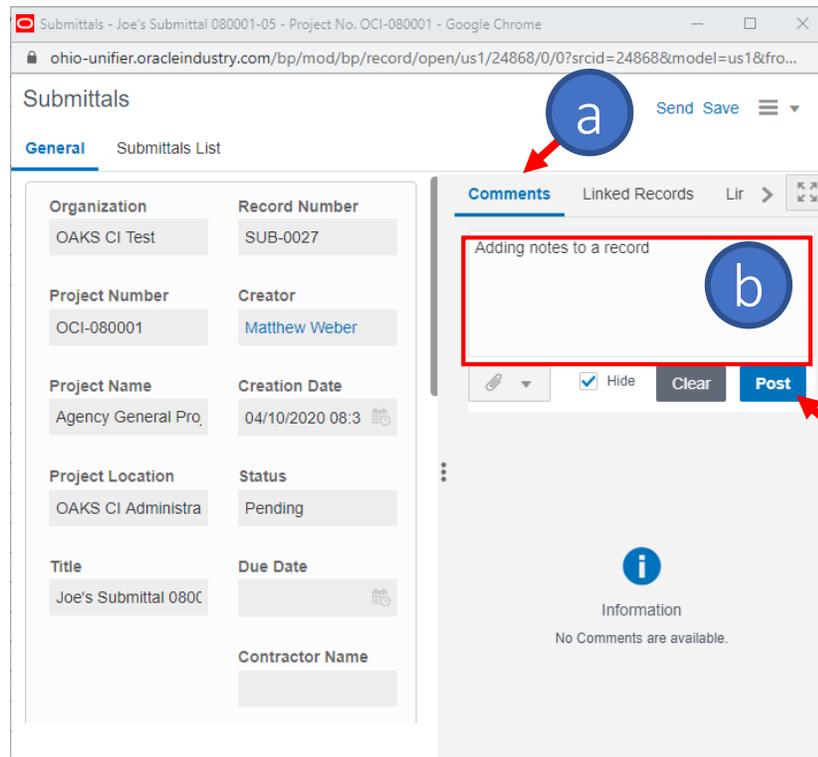
The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle Primavera Unifier logo and breadcrumb navigation: Home > Project Documents. A sidebar on the left contains navigation options: Alerts, Tasks, E-Signatures, Drafts, Mailbox, Information, Cost Manager, Data Manager, Document Manager, Documents (highlighted), Recycle Bin, Unpublished Document..., Logs, and Reports. The main content area displays a list of documents with columns for Name, Issue Date, and Issue Date. 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".

Name	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...



# Adding Comments to Record

- ▶ Adding Comments are a good way to communicate with team members about a specific record
  - a) Click the Comments tab Click Add
  - b) Enter Comments
  - c) Click Post
  - d) The comment will display as a permanent part of the record



# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211

