



Document Manager

System Upgrade, May 2017

Viewing Options

- ▶ In Document Manager and Logs, your default view is usually **Classic View**.
- ▶ You now have a new viewing option, **Standard View**.

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar shows the user 'Katie Tuttle' and a 'Sign Out' option. The breadcrumb trail indicates the current location: Agency > OAKS CI Training > OAKS CI Training 4. The left sidebar contains various navigation options, with 'Documents' selected. The main content area shows a document list in 'Standard View'. The list includes columns for 'Name', 'Size', 'Upload Date', and 'Owner'. The documents listed are folders for various project phases, all owned by 'Shauna Hooks'. A 'Switch to Standard View' link is visible in the top right of the document list area.

	Ref.	BP	Name	Size	Upload Date	Owner
0000 Concept Development			0000 Concept Development			Shauna Hooks
0100 Acquisition			0100 Acquisition			Shauna Hooks
0200 Design			0200 Design			Shauna Hooks
0300 Construction			0300 Construction			Shauna Hooks
0400 Post Construction			0400 Post Construction			Shauna Hooks
0500 Extra Services			0500 Extra Services			Shauna Hooks
0600 Budget			0600 Budget			Shauna Hooks

Access Standard View

- ▶ You can access **Standard View** by clicking “**Switch to Standard View**” in the upper right hand corner

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle' with a 'Sign Out' link. Below this, there are tabs for 'School Facilities', 'Agency', and 'OAKS CI Trainin...'. A red arrow points to the 'Switch to Standard View' button, which is highlighted with a red box in the upper right corner of the main content area. The main content area shows a file explorer view with a 'Documents' folder expanded, listing seven items: '0000 Concept Development', '0100 Acquisition', '0200 Design', '0300 Construction', '0400 Post Construction', '0500 Extra Services', and '0600 Budget'. The interface also includes a left-hand navigation menu with various options like 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Documents', 'Unpublished Documents', 'Logs', and 'Reports'.

Ref.	BP	Name	Size	Upload Date	Owner
		0000 Concept Development			Shauna Hooks
		0100 Acquisition			Shauna Hooks
		0200 Design			Shauna Hooks
		0300 Construction			Shauna Hooks
		0400 Post Construction			Shauna Hooks
		0500 Extra Services			Shauna Hooks
		0600 Budget			Shauna Hooks

Access Classic View

- ▶ If you want to get back to **Classic View**, simply click “**Switch to Classic View**” in the upper right hand corner

The screenshot displays the Oracle Primavera Unifier web interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle' with a 'Sign Out' link. Below this, there are tabs for 'School Facilities', 'OAKS CI District...', 'Oak Hills Local ...', and 'OAKS CI Trainin...'. The main content area is titled 'Documents' and shows a breadcrumb path: 'Agency > OAKS CI Training > OAKS CI Training 4'. A red arrow points to a button labeled 'Switch to Classic View' in the upper right corner of the main content area. Below the breadcrumb, there are controls for 'Create', 'Actions', download/upload icons, a 'View' dropdown set to 'All', and refresh/filter icons. A table lists documents with columns for Name, Ref, BP, Size, Upload Date, Owner, and Title. The table shows a folder named 'Documents' owned by 'Shauna Hooks' and several sub-folders: '0000 Concept Deve...', '0100 Acquisition', '0200 Design', '0300 Construction', '0400 Post Construc...', '0500 Extra Services', and '0600 Budget'. At the bottom, it indicates 'Total: 220'.

Name	Ref	BP	Size	Upload Date	Owner	Title
Documents					Shauna Hooks	
0000 Concept Deve...					Shauna Hooks	
0100 Acquisition					Shauna Hooks	
0200 Design					Shauna Hooks	
0300 Construction					Shauna Hooks	
0400 Post Construc...					Shauna Hooks	
0500 Extra Services					Shauna Hooks	
0600 Budget					Shauna Hooks	

Using Standard View

- ▶ When navigating in Standard View, notice that the middle folder pane no longer exists
- ▶ To navigate to a folder, simply click the plus sign to expand the folder tree and locate the folder you wish to access

ORACLE PRIMAVERA Unifier Katie Tuttle Sign Out

School Facilities OAKS CI District... Oak Hills Local ... OAKS CI Trainin...

OAKS CI Training 4 - H... Alerts Tasks Notifications Drafts uMail Information Cost Manager Data Manager Document Manager Documents Unpublished Docu... Logs Reports

Documents Documents > Switch to Classic View

Create Actions View All

Name Documents

0000 Concept Deve... 0010 Acquisition 0200 Design 0300 Construction 0400 Post Constru... 0500 Extra Services 0600 Budget

Total: 220

Documents Documents > Switch to Classic View

Create Actions View All

Name	Ref BP	Size	Upload Date	Owner	Title	Rev.No.	Issue Date	Pub.N
Documents				Shauna Hooks				0
0000 Concept Deve...				Shauna Hooks				0
0010 Owner Vist...				Shauna Hooks				0
Chrysanthemum...		859 KB	02/02/2017 10...	Student 1				1
Picture1.jpg		8 KB	05/04/2017 06...	Katie Tuttle				1
0060 Funding				Shauna Hooks				0
0020 Project Definit...				Shauna Hooks				0
0030 Planning				Shauna Hooks				0
0040 Feasibility				Shauna Hooks				0
0050 Budgeting				Shauna Hooks				0
0070 Local Adminis...				Shauna Hooks				0
Picture1.jpg		8 KB	05/04/2017 06...	Katie Tuttle				1
0100 Acquisition				Shauna Hooks				0
0200 Design				Shauna Hooks				0
0300 Construction				Shauna Hooks				0

Total: 222

Using Standard View

- ▶ You can also navigate to folders using the documents file path at the top of your Documents screen
- ▶ Simply click the arrow next to documents, and continue selecting until you locate the appropriate folder

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. Below this, there are tabs for 'School Facilities', 'Agency', and 'OAKS CI Trainin...'. The main content area is titled 'Documents' and shows a breadcrumb navigation path: 'Documents > 0200 Design > 0240 Construction Documents > Schedule'. A red box highlights this path. Below the breadcrumb, there are buttons for 'Create', 'Actions', 'View', and a dropdown menu set to 'All'. A table below shows a single document entry: 'Schedule' with owner 'Shauna Hooks'. The bottom of the interface shows 'Total: 222' and a URL: 'https://ohio-dev-unifier.oracleindustry.com/bp/mod/dm/doc/home?_uref=uuu748:navigator-3#'

ORACLE PRIMAVERA Unifier Katie Tuttle Sign Out

School Facilities Agency OAKS CI Trainin...

OAKS CI Training 4 - Home

Alerts

Tasks

Notifications

Drafts

uMail

Information

Cost Manager

Data Manager

Document Manager

Documents

Unpublished Documents

Logs

Reports

Documents

Documents >

Create 0000 Concept Development All

0100 Acquisition

0200 Design

0300 Construction

0400 Post Construction

0500 Extra Services

0600 Budget

0600 Budget

Shauna Hooks

Pub.No. 0

Documents Switch to Classic View

Documents > 0200 Design > 0240 Construction Documents > Schedule

Create Actions View All

Name Ref BP Size Upload Date Owner Title

Schedule Shauna Hooks

Total: 222

https://ohio-dev-unifier.oracleindustry.com/bp/mod/dm/doc/home?_uref=uuu748:navigator-3#

Using Standard View

- ▶ When you click on a document, you can view more information about that document in a preview window on the right hand side.
- ▶ Here, you can view which record numbers this document is linked to

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The breadcrumb trail shows 'School Facilities' > 'Agency' > 'OAKS CI Trainin...'. The main content area is titled 'Documents' and shows a list of documents. A document named 'Chrysanthemu...' is selected, and a red arrow points to it. On the right side, a 'Linked ...' window is open, showing a list of record numbers: AI-00121, PWR-0080, MM-0036, and MM-0037. The 'Total: 222' is displayed at the bottom of the document list.

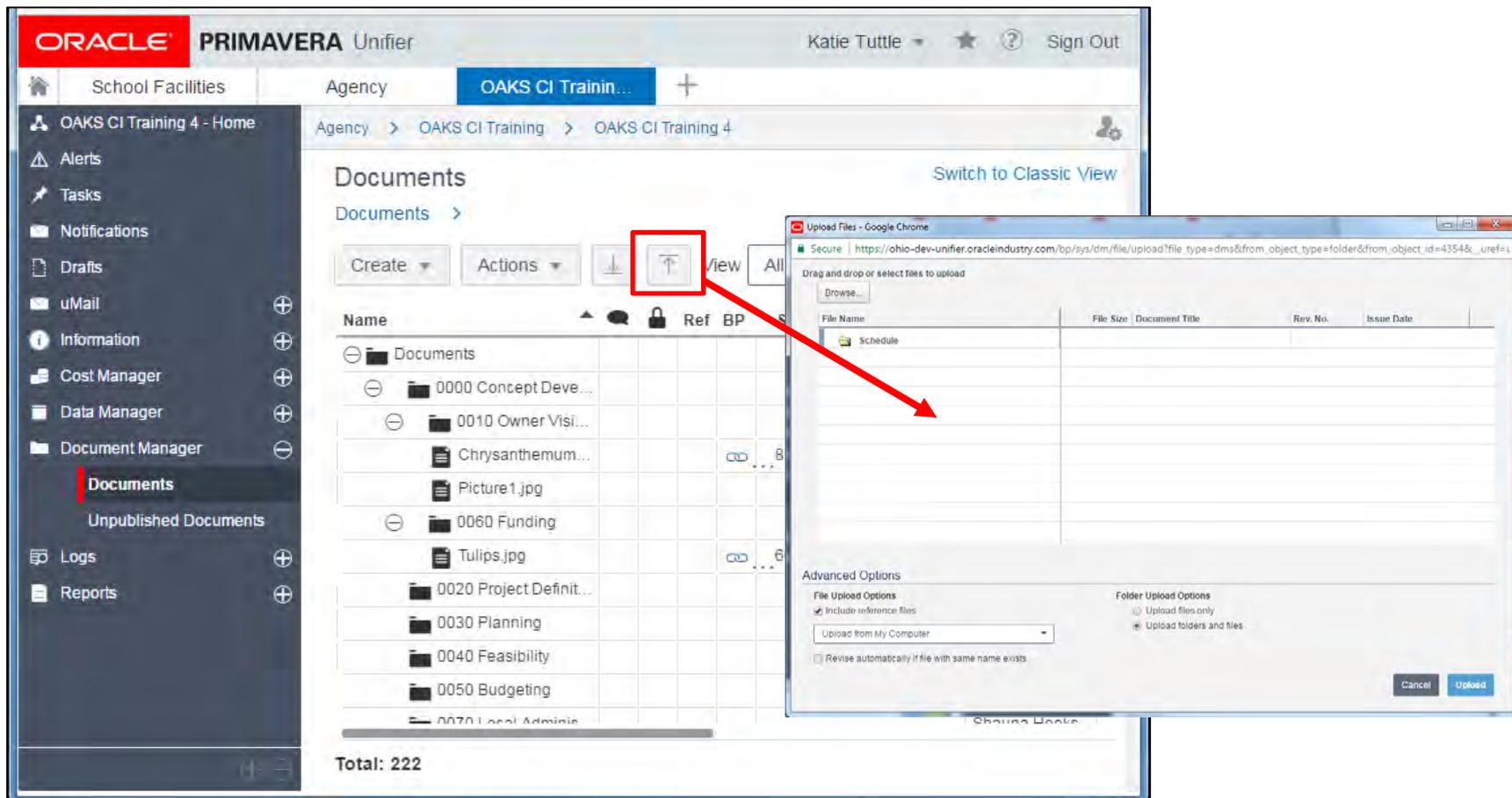
Name	Ref	BP	Size
Documents			
0000 Concept Deve...			
0010 Owner Visi...			
Chrysanthemu...			859 KB
Picture1.jpg			8 KB
0060 Funding			
Tulips.jpg			607 KB
0020 Project Definit...			
0030 Planning			
0040 Feasibility			

Record Number
AI-00121
PWR-0080
MM-0036
MM-0037

Document Manager

- ▶ To upload a document to Document Manager, click the **Upload Arrow button** 

- ▶ Your normal upload window will open and you will continue the normal upload process



The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', the user name 'Katie Tuttle', and a 'Sign Out' button. The main content area is titled 'Documents' and shows a list of folders and files. A red box highlights the 'Upload Arrow' button in the top toolbar. An 'Upload Files' dialog window is open, showing a table for file uploads and advanced options.

Documents

Documents >

Create Actions   View All

Name	Ref	BP
Documents		
0000 Concept Deve...		
0010 Owner Visi...		
Chrysanthemum...		8
Picture1.jpg		
0060 Funding		
Tulips.jpg		6
0020 Project Definit...		
0030 Planning		
0040 Feasibility		
0050 Budgeting		
0070 Local Adminis...		

Total: 222

Upload Files - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/sys/dm/file/upload?file_type=dms&from_object_type=folder&from_object_id=4354&_uref=1

Drag and drop or select files to upload

Browse...

File Name	File Size	Document Title	Rev. No.	Issue Date
Schedule				

Advanced Options

File Upload Options

Include reference files

Upload from My Computer

Folder Upload Options

Upload files only

Upload folders and files

Revise automatically if file with same name exists

Cancel Upload

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211