



# Introduction to OAKS CI

## September, 2019

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# What does OAKS CI do for you?

- ▶ Tracks your project progress
- ▶ Automates workflows (based on Ohio Facilities Construction Commission forms and procedures)
- ▶ Allows for improved project communication and collaboration
- ▶ Housed in the Cloud so you can utilize any browsing tool to access (Chrome recommended)
- ▶ Now includes DocuSign for OFCC Administered Projects, which minimizes time spent in OAKS CI

# OAKS CI Need to Know

- ▶ If you require access to a project housed in OAKS CI, please contact your OFCC or Agency Project Manager or Project Coordinator
- ▶ Access in OAKS CI is based on your role, your role in the system will determine the records that you can create and access as well as your folder access within Document Manager.
- ▶ OAKS CI is housed in the Cloud so you can utilize any browsing tool to access (Chrome recommended)

# System Navigation



# Browser Information

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



# Navigate to OAKS CI

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

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



**ORACLE**

**Construction and Engineering**

v5249822

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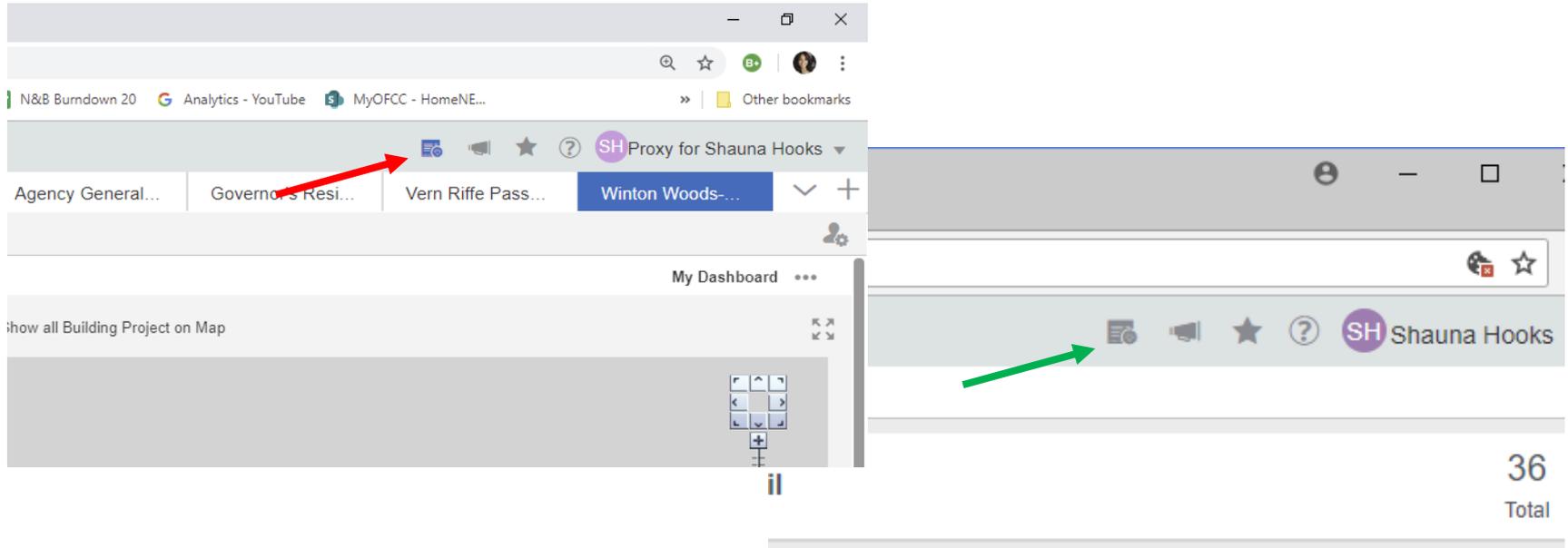
**Sign In** [Forgot Password](#)

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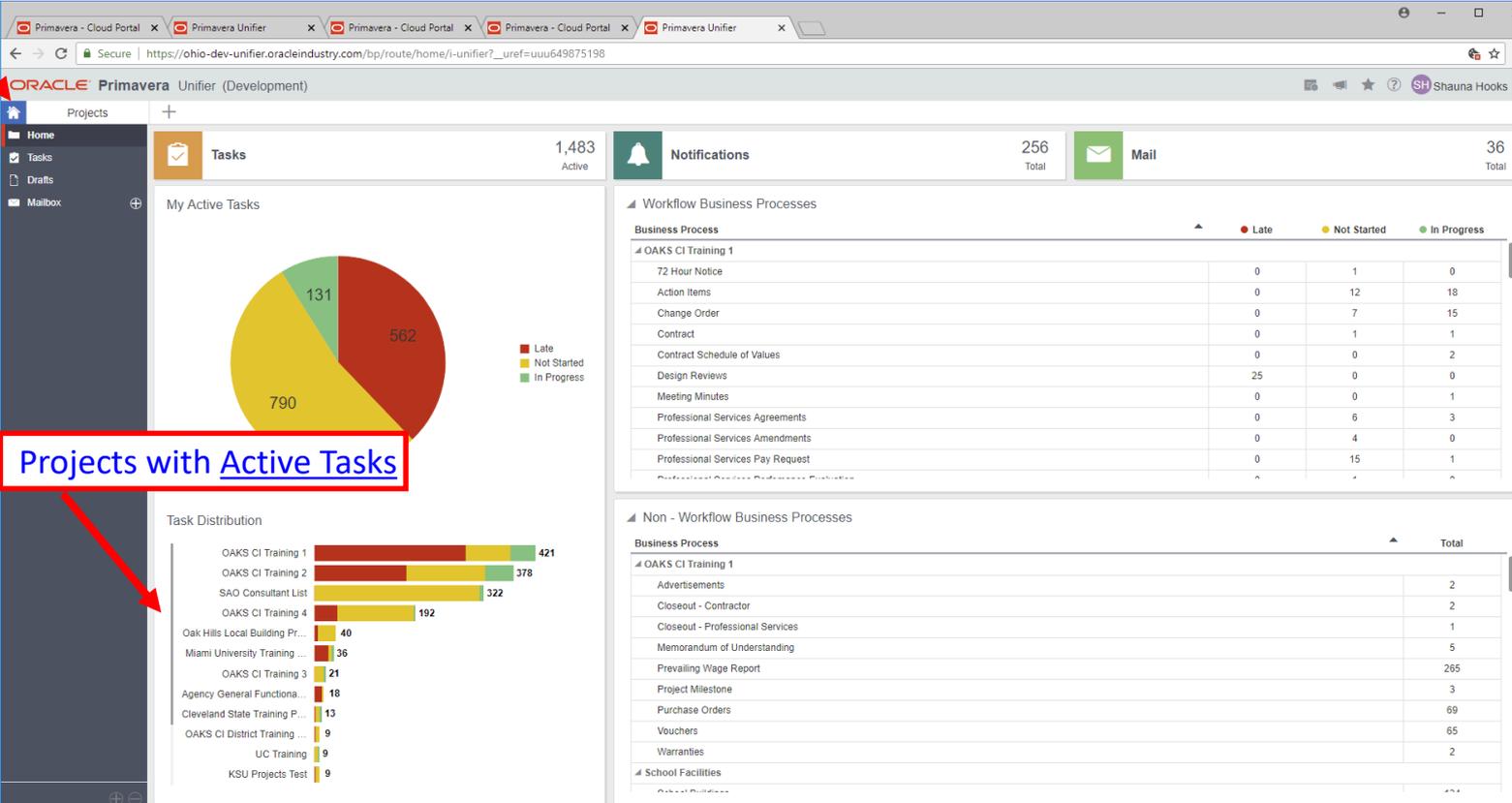
# IMPORTANT VIEW NOTICE

- ▶ The UI (User Interface) button in the upper right hand corner of your screen should NOT be blue. This will change how you view the system. To disable click the blue button, it should turn gray



# Home Page

- ▶ The Home button  is located on the left hand side of project tabs
- ▶ Your Home Page allows you to see all of your tasks (your work) for all projects you are a member of



**Projects with Active Tasks**

Business Process	Late	Not Started	In Progress
OAKS CI Training 1	0	1	0
72 Hour Notice	0	12	18
Action Items	0	7	15
Change Order	0	1	1
Contract	0	0	2
Contract Schedule of Values	25	0	0
Design Reviews	0	0	1
Meeting Minutes	0	6	3
Professional Services Agreements	0	4	0
Professional Services Amendments	0	15	1
Professional Services Pay Request			

Business Process	Total
OAKS CI Training 1	
Advertisements	2
Closeout - Contractor	2
Closeout - Professional Services	1
Memorandum of Understanding	5
Prevailing Wage Report	265
Project Milestone	3
Purchase Orders	69
Vouchers	65
Warranties	2
School Facilities	

# Find your Project

- ▶ To locate your project, click on the + (a) sign to the right of the project tabs
- ▶ In the secondary screen, type your project number or type the Project Name (b) then click the magnifying glass to search (c)
- ▶ Click on your project (d)

The screenshot displays the Oracle Primavera Project Manager interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Project Manager (Development)', and user information 'Katie Tuttle' with a star icon, a question mark icon, and a 'Sign Out' link. Below the navigation bar, a breadcrumb trail shows 'OAKS CI Trainin...' followed by a red circle containing a plus sign (+) labeled 'a'. A modal window titled 'All Locations' is open, showing a search bar with 'OCI' entered, a magnifying glass icon labeled 'c', and a table of project records. The table has columns for 'Number', 'Name', and 'Location'. The fourth row, 'OCI-090004 OAKS CI Training 4 /Agency/OAKS CI Training', is highlighted with a blue circle labeled 'd'. The table also shows a 'Total: 9' at the bottom. To the right of the modal, a 'Record Details' panel is visible, showing 'General' information for the selected project, including Organization (Department of Administrative Services), Record Number (CO-0034), Project Number (OCI-090004), Creator (Katie Tuttle), Project Name (OAKS CI Training 4), Creation Date (08/29/2017 08:03 AM (UTC-8)), Project Location (4200 Surface Road), Status (Pending), Title (GMP Distribution), Trade (General Contractor), Contract Reference (10), and Contractor Name (R. W. Setterlin Building Company).

Number	Name	Location
OCI-080001	OAKS CI Training 1	/Agency/OAKS CI Training
OCI-080002	OAKS CI Training 2	/Agency/OAKS CI Training
OCI-090001	Agency General Projects Test	/Agency/Ohio Facilities Construction Commiss...
OCI-090003	OAKS CI Training 3	/Agency/OAKS CI Training
OCI-090004	OAKS CI Training 4	/Agency/OAKS CI Training
OCI-090005	OAKS CI Training 5	/Agency/OAKS CI Training
OCI-100001	SAO Consultant List	/Agency/Ohio Facilities Construction Commiss...
OCI-170001	Payment Request Test	/Agency/OAKS CI Training
OCI01	OAKS CI Training	/Agency

# Project Home Page

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

The screenshot shows the Primavera Unifier interface. The browser tabs at the top include 'Primavera - Cloud Portal' and 'Primavera Unifier'. The URL is [https://ohio-dev-unifier.oracleindustry.com/bp/route/13/i-projectname?\\_\\_uref=uuu649875198#](https://ohio-dev-unifier.oracleindustry.com/bp/route/13/i-projectname?__uref=uuu649875198#). The page title is 'ORACLE Primavera Unifier (Development)'. The main menu on the left is expanded, showing 'Tasks' and 'Logs' highlighted with red boxes. The main content area displays the project details for 'Oak Hills Local SD Building 2 - Home'. The 'Summary' tab is active, showing an 'Image' placeholder. The 'Details' tab is also visible, showing the following information:

Number:	SFC-169999.99
Name:	Oak Hills Local SD Building 2
Description:	Test building project
Administrator:	Barbara Taylor
Currency:	United States Dollar (USD)
Status:	Active
Email Address:	ohio_unifier_dev+1088@oracleindustry.com

On the right side, there are sections for 'Items Requiring Your Attention' and 'Links'. The 'Items Requiring Your Attention' section includes links for 'Tasks', 'Notifications', 'Draft Records', and 'uMails'. The 'Links' section includes a link for 'QFCC'.

# Tasks (Your Work)

- ▶ Tasks are records that come to you for your review or approval
  - ▶ One example of a Task would be a Submittal record, created under Logs by the Contractor and submitted to the A/E for review. It is now the A/E's Task.
- ▶ Double Click on the Task to open

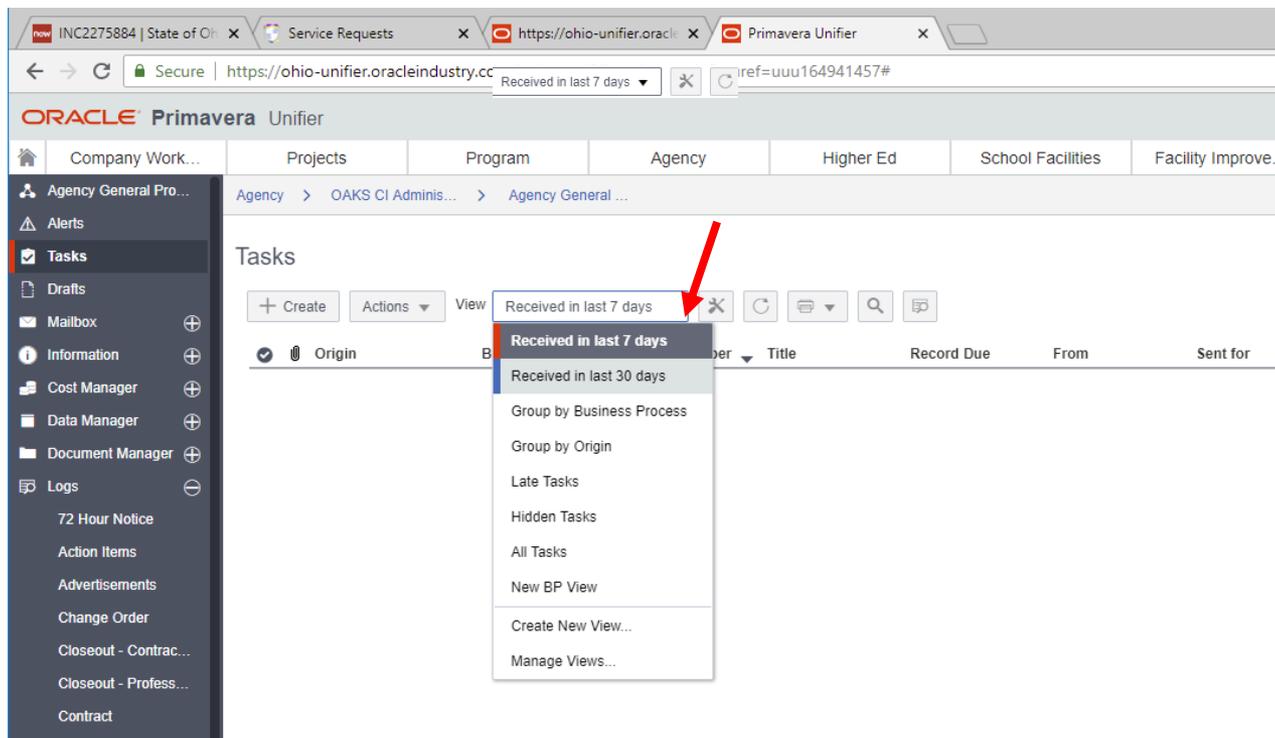
The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with 'Tasks' highlighted in red. The main area displays a table of tasks. The first task is highlighted in red:

Origin	Business Process	Record Number	Title	Record Due
OAKS CI Training 4	Action Items	AI-00164	test 1	05/01/2017
OAKS CI Training 4	Subcontractor/Su...	SSD-0142	Katie's Concrete	
OAKS CI Training 4	Contractor Pay Re...	CPR-0037	Stored Materials T...	
OAKS CI Training 4	Subcontractor/Su...	SSD-0143	PPH	
OAKS CI Training 4	Action Items	AI-00159	Katie Marie	04/19/2017
OAKS CI Training 4	Design Reviews	DR-0020		
OAKS CI Training 4	Action Items	AI-00157	katie	04/13/2017
OAKS CI Training 4	Design Reviews	DR-0019		
OAKS CI Training 4	Design Reviews	DR-0012		
OAKS CI Training 4	Design Reviews	DR-0013		
OAKS CI Training 4	Design Reviews	DR-0014		
OAKS CI Training 4	Design Reviews	DR-0015		
OAKS CI Training 4	Design Reviews	DR-0016		
OAKS CI Training 4	Design Reviews	DR-0017		
OAKS CI Training 4	Design Reviews	DR-0018		
OAKS CI Training 4	Professional Serv...	PSPR-0009	Project - Firm - Ap...	
OAKS CI Training 4	Professional Serv...	PSPR-0005	Katie's Consulting...	

The right sidebar shows the 'Record Details' for the selected task, including fields for Organization, Project Number, Project Name, Project Location, Title, Assignee, Meeting Minute, and Action.

# Tasks (Your Work)

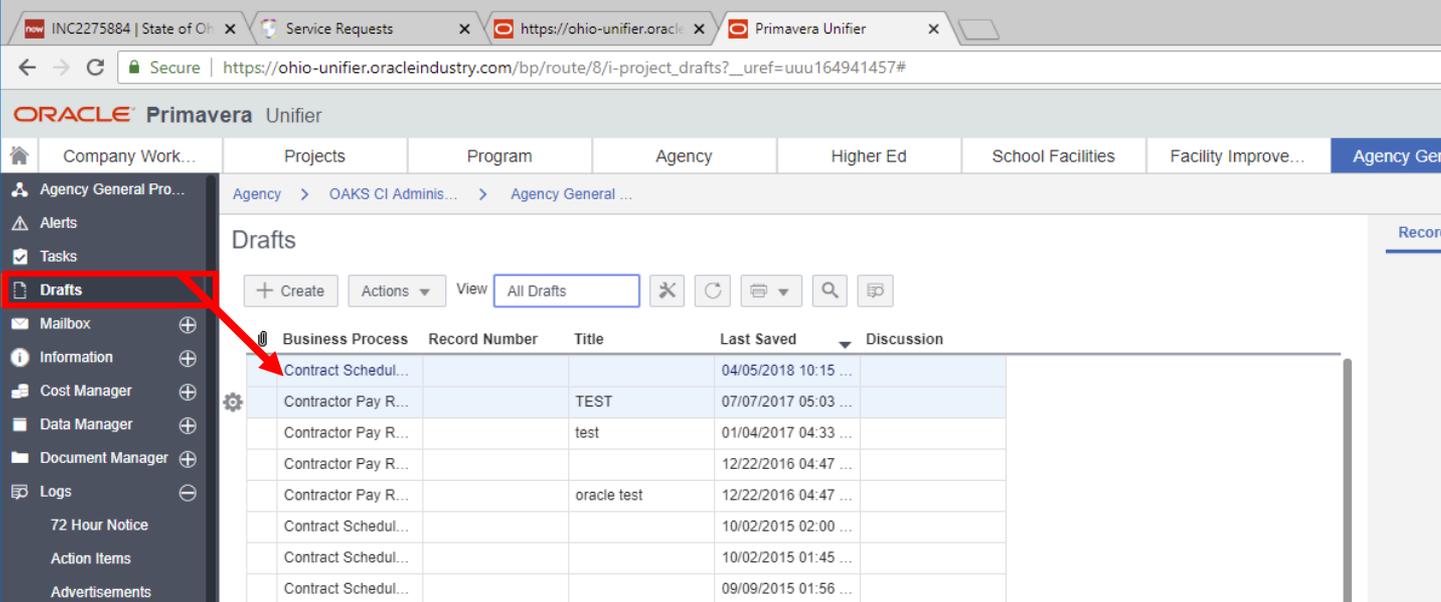
- ▶ To change your Task Viewing option, click the arrow down next to View and select.
- ▶ **Note:** The Task view automatically defaults to 7 days, change your view to All Tasks to see all available Tasks in your list



The screenshot shows the Primavera Unifier interface. The browser address bar indicates the URL is <https://ohio-unifier.oracleindustry.com>. The page title is "ORACLE Primavera Unifier". The navigation menu on the left includes "Agency General Pro...", "Alerts", "Tasks", "Drafts", "Mailbox", "Information", "Cost Manager", "Data Manager", "Document Manager", "Logs", "72 Hour Notice", "Action Items", "Advertisements", "Change Order", "Closeout - Contrac...", "Closeout - Profess...", and "Contract". The main content area is titled "Tasks" and shows a table with columns: "Origin", "B...", "Title", "Record Due", "From", and "Sent for". The "View" dropdown menu is open, showing the current view as "Received in last 7 days". A red arrow points to the dropdown arrow next to "View". The dropdown menu options are: "Received in last 7 days", "Received in last 30 days", "Group by Business Process", "Group by Origin", "Late Tasks", "Hidden Tasks", "All Tasks", "New BP View", "Create New View...", and "Manage Views...".

# Drafts

- ▶ Drafts are any unfinished records that you have created and saved for later
- ▶ You can delete any drafts you no longer need



The screenshot shows the Oracle Primavera Unifier interface. The browser address bar indicates the URL is [https://ohio-unifier.oracleindustry.com/bp/route/8/i-project\\_drafts?\\_uref=uuu164941457#](https://ohio-unifier.oracleindustry.com/bp/route/8/i-project_drafts?_uref=uuu164941457#). The interface includes a navigation menu on the left with items like Alerts, Tasks, Drafts, Mailbox, Information, Cost Manager, Data Manager, Document Manager, and Logs. The 'Drafts' menu item is highlighted with a red box, and a red arrow points from it to the 'Drafts' section header in the main content area. The main content area displays a table of draft records with columns for Business Process, Record Number, Title, Last Saved, and Discussion.

Business Process	Record Number	Title	Last Saved	Discussion
Contract Schedul...			04/05/2018 10:15 ...	
Contractor Pay R...		TEST	07/07/2017 05:03 ...	
Contractor Pay R...		test	01/04/2017 04:33 ...	
Contractor Pay R...			12/22/2016 04:47 ...	
Contractor Pay R...		oracle test	12/22/2016 04:47 ...	
Contract Schedul...			10/02/2015 02:00 ...	
Contract Schedul...			10/02/2015 01:45 ...	
Contract Schedul...			09/09/2015 01:56 ...	

# Drafts and Timeout



OAKS CI times out after 60 Minutes of Inactivity

- ▶ All unsaved work will be lost
- ▶ No warning will be given

Use “Save” if needed to save work as a draft

The screenshot shows the OAKS CI software interface. The menu bar includes File, Edit, View, Actions, and Help. The toolbar contains buttons for Send, Save (circled in red), Spelling..., Add Attachment, Discussion, SOV, and Close Window. The main content area is titled 'Applications for Payment K12' and includes sections for General, Action Details, and Pay Request Details. The General section contains fields for Project Name (Miami Trace-LSD-FAY-CFAP-2014), Record Number, Project Number (SFC-160389), and Creator (Katie Tuttle). The Action Details section has fields for To..., Cc..., and Send For. The Pay Request Details section shows a table with columns for No., WBS Code, Commit Short Description, Scheduled Value, Previously Earned, Earned This Period, % Labor Complete, and % Materials Complete. The bottom of the interface includes buttons for Add, Copy, Import, Remove, and Find, along with a Total Amount field set to \$0.00. The footer contains links for Attachments (0), Linked Records (0), General Comments (circled in red), and Linked Mail (0).

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

# Utilizing Document Manager

- ▶ Document manager houses all supporting documentation for the project
- ▶ The utilization of Document Manager will differ based on your particular project
- ▶ Speak to your project team about how your project will utilize Document Manager

# Document Manager

- ▶ Click **Document Manager** -> **Documents** in the dark gray menu to the left

The screenshot displays a web application interface for a Document Manager. On the left, a dark gray sidebar menu contains various navigation options, with 'Document Manager' and 'Documents' highlighted in red. The main content area shows a list of documents under the heading 'Documents'. The table below lists various document categories, all owned by 'Barbara Taylor'.

Name	Owner	Title	Rev.No
Action Items	Barbara Taylor		
Agreements - Amendments	Barbara Taylor		
Applications for Payment	Barbara Taylor		
Budget	Barbara Taylor		
Closeout	Barbara Taylor		
Meeting Minutes	Barbara Taylor		
Misc Commits - Invoices	Barbara Taylor		
Payment Vouchers	Barbara Taylor		
Planning	Barbara Taylor		
Procurement	Barbara Taylor		
Purchase Orders	Barbara Taylor		
SMSD	Barbara Taylor		
Vendor Information	Barbara Taylor		

The right sidebar shows the 'Properties' tab for the selected document, with fields for Name, Location, Owner (Barbara Taylor), Creation Date (11/16/2016 04:13 PM (UTC-5)), % Complete, and Description. Below this, there are sections for 'Other' settings, including Categories and Phases, with checkboxes to apply settings to folders and sub-folders.

At the bottom of the interface, the status bar shows 'Total Files: 13', 'Page 1 of 1', and 'Display 1000 Per Page'.

# Upload Document Manager

- ▶ If you are asked to upload a document to Document Manager:
  - Click the yellow folder to expand to subfolders (some folders may not have subfolders)

ORACLE Primavera Unifier

Agency > Department of Ad... > Vern Riffe Passen...

Documents

Home > Project Documents > 0100 Acquisition

Create Actions View All

Name	Size	Upload Date	Owner	Title	Rev.Nc
0105 Contracting Author...			Archana Atrey		
0110 Architect-Engineer			Amanda Paisley		
0110 Associate			Archana Atrey		
0120 Construction Manager			Archana Atrey		
0130 Consultant			Archana Atrey		
0140 Construction Contrac...			Archana Atrey		

Properties

Name \*  
0105 Contracting Authority

Location  
/0100 Acquisition

Owner  
Archana Atrey

Creation Date  
02/13/2017 02:48 PM (UTC-5)

% Complete

Description

# Utilizing Document Manager

- ▶ Uploading directly to Document Manager
  - Click the tool wheel
  - Choose Upload

The screenshot displays the Oracle Primavera Unifier web interface. The browser address bar shows the URL: `ohio-unifier.oracleindustry.com/bp/route/14/i-dm?_uref=uuu249170418`. The page title is "ORACLE Primavera Unifier". The breadcrumb navigation is "Agency > Department of Ad... > Vern Riffe Passen...". The main content area is titled "Documents" and shows a table of documents under the path "Home > Project Documents > 0100 Acquisition". A table with columns "Name", "Size", "Upload Date", "Owner", "Title", and "Rev.Nc" is visible. The "Name" column contains entries like "0105 Contracting Authority", "ct-Engineer", "ite", "uction Manager", "stant", and "uction Contrac...". A context menu is open over the "0105 Contracting Authority" row, with the "Upload" option selected. A red arrow points from the "Upload" option in the context menu to the "Upload" button in the table's action bar. The right sidebar shows the "Properties" tab for the selected document, with fields for "Name", "Location", "Owner", "Creation Date", "% Complete", and "Description".

# Utilizing Document Manager

- ▶ Uploading directly to Document Manager
  - Click Browse (this will take you to your computer)
  - Select the document/s ; Click Open

The screenshot illustrates the process of uploading a document to a Document Manager. It shows two overlapping windows:

- Browser Window (Upload Files - Google Chrome):** The address bar shows the URL: `ohio-unifier.oracleindustry.com/bp/sys/dm/file/upload?file_type=dms&from_object_type=folder&from_object_id=722227&_uref=uuu24917...`. The main content area displays the instruction "Drag and drop or select files to upload" and a "Browse..." button. A red arrow points to the "Browse..." button.
- File Explorer Window (Open):** The window title is "Open". The address bar shows the path: `<< OAKS CI Training Materials >> 02- Training Presentations >> 06- Smart Art`. The search bar contains "Search 06- Smart Art". The left sidebar shows a folder tree with "02- Training Presentations" selected. The main pane displays a list of files with columns for Name, Status, Date modified, Type, and Size. The file "OAKS CI ProfessionalServicesContractProcess.thru SOVprocess" is selected. A red arrow points to this file. At the bottom, the "File name" field contains "OAKS CI ProfessionalServicesContractProcess.thru SOVprocess", the file type is set to "All Files", and the "Open" button is highlighted with a red arrow.



# Utilizing Document Manager

- ▶ Move a document from one folder to another
  - Locate the document that you wish to move
    - Click the tool wheel next to the document
    - Select Move

The screenshot displays a web-based Document Manager interface. On the left is a dark sidebar with a navigation menu. The main area shows a file list table with columns for Name, Size, Upload Date, Owner, and Title. The file 'test.docx' is selected, and a context menu is open over it, with a red arrow pointing to the 'Move' option. Another red arrow points to the gear icon (tool wheel) next to the file in the table. The right side of the interface shows a form for document details, including fields for Name, Location, Title, Revisor, Issue Date, Pub No., % Comp, Description, Owner, Upload Date, and Creator.

Name	Size	Upload Date	Owner	Title
0000 Concept Development			Steve Mayo	
0100 Acquisition			Steve Mayo	
0200 Design			Steve Mayo	
0300 Construction			Steve Mayo	
0400 Post Construction			Steve Mayo	
0500 Extra Services			Steve Mayo	
0600 Budget			Steve Mayo	
Chrysanthemum.jpg	859 KB	08/30/2016 03...	Katie Tuttle	
Clear Browsing Data.docx	886 KB	09/01/2016 03...	Katie Tuttle	
Construction Phase DB Tr...	26 MB	02/09/2017 09...	Katie Tuttle	
Desert.jpg	827 KB	08/30/2016 03...	Katie Tuttle	
Penguins.jpg	760 KB	09/02/2016 02...	Katie Tuttle	
Test doc 5.docx	12 KB	03/20/2017 03...	Katie Tuttle	
Test document.rtf	1 KB	12/01/2016 02...	Katie Tuttle	
Test Uploads			Fred Holcomb	
test.docx	10 KB	04/16/2010 10...	Becky Bessell	

# Utilizing Document Manager

- ▶ Move a document from one folder to another
  - Choose the folder and then the subfolder you wish to relocate the document into
  - You can do this by clicking the yellow folder

The screenshot displays the Primavera Unifier Document Manager interface. The main window shows a breadcrumb path: Agency > OAKS CI Adminis... > Agency General... The page title is "Move - Select destination folder". The breadcrumb path is updated to: Home > Project Documents > 0100 Acquisition. A search bar is present with the text "Search | Find on Page". A table lists folders with columns for Name, Location, and Owner. A red arrow points to the "0100 Acquisition" folder in the table. A secondary window in the foreground shows a similar view with a red arrow pointing to the "0100 Acquisition" folder in the table.

Name	Location	Owner
0100 Concept Development	/	Steve Mayo
<b>0100 Acquisition</b>	/	Steve Mayo
0200 Design	/	Steve Mayo
0300 Construction	/	Steve Mayo
0400 Post Construction	/	Steve Mayo
0500 Extra Services	/	Steve Mayo
0600 Budget	/	Steve Mayo
Test Uploads	/	Fred Holcomb

Name	Location	Owner
0105 Contracting Authority	/0100 Acquisition	Steve Mayo
<b>0110 Associate</b>	/0100 Acquisition	Steve Mayo
0120 Construction Manager	/0100 Acquisition	Steve Mayo
0130 Consultant	/0100 Acquisition	Steve Mayo
0140 Construction Contractor	/0100 Acquisition	Steve Mayo
0199 Miscellaneous	/0100 Acquisition	Steve Mayo

# Utilizing Document Manager

- ▶ Move a document from one folder to another
  - Click in the space of the folder you wish to move the document
  - **NOTE:** Do **not** click the name of the folder **or** on the wheel. You must click in the empty space next to the name of the folder
  - Click Move

The screenshot shows the Document Manager interface. On the left is a navigation sidebar with categories like Information, Cost Manager, Data Manager, Document Manager, Documents, Recycle Bin, Unpublished Documents, Logs, and various project-related items. The main area displays a 'Move - Select destination folder' dialog. The breadcrumb path is 'Home > Project Documents > 0100 Acquisition/01...'. Below the path is a search bar and a table of documents. A blue callout bubble points to the empty space between the folder name 'Request for Qualification' and the table, with the text 'Click here'. At the bottom right of the dialog, there are 'Cancel' and 'Move' buttons, with a red arrow pointing to the 'Move' button.

Name	Location	Owner	Title	Revision...	Issue Date	Size
Associate Agreement	/0100 Acquisition/01...	Steve Mayo				
Request for Qualification	/0100 Acquisition/...	Steve Mayo				
Statement of Qualifications	/0100 Acquisition/01...	Steve Mayo				
Request For Proposal	/0100 Acquisition/01...	Steve Mayo				

Total: 4

Cancel Move

# Logs

- ▶ Logs house All Records for your project
- ▶ Any record that you have access to View and/or Create will be available under Logs
- ▶ To view a specific record, Click Logs, choose the record type, click the record and a preview will show on the right hand side

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', 'OAKS CI District...', 'Oak Hills Local ...', and 'OAKS CI Trainin...'. A left-hand sidebar contains a list of navigation options, with 'Logs' highlighted in a red box. The main content area is titled 'Action Items' and features a 'Switch to Classic View' link. Below the title are buttons for '+ Create', 'Actions', 'View', and a dropdown menu set to 'All Records'. A table lists action items with columns for 'Record No', 'Title', 'Assignee', and 'Due D'. The first row, 'AI-00165 Test Action Item', is highlighted in blue, and a red arrow points from this row to the 'Record Details' panel on the right. The 'Record Details' panel shows information for 'Test Action Item', including Organization (Department of Administrative Services), Record Number (AI-00165), Project Number (OCI-090004), Creator (Katie Tuttle), Project Name (OAKS CI Training 4), Creation Date (05/02/2017 10:20 AM (UTC-8)), Project Location (4200 Surface Road), Title (Test Action Item), Status (Pending), Assignee (katie), Priority (Medium), and Meeting Minute (05/09/2017 10:05 AM (UTC-8)).

Record No	Title	Assignee	Due D
AI-00165	Test Action Item		05/0
AI-00164	test 1		05/0
AI-00163	test 1		05/0
AI-00162	Chris Hare		04/1
AI-00161	Carol Amistadi_ PPH		04/1
AI-00160	Winnie Agbalevu		04/1
AI-00159	Katie Marie		04/1
AI-00158	Ben Posey		04/1
AI-00157	katie		04/1
AI-00156	DAVE BILLS		04/1
AI-00155	Emily Rinear		04/1
AI-00154	Katie Tuttle		04/1
AI-00153	STUDENT 4		03/3

# Basic Record Status

- ▶ In Logs, choose Record type, click on specific Record
- ▶ The basic status can be viewed in the “Record Details” preview

The screenshot displays the Oracle Primavera Unifier interface. The left sidebar shows a navigation menu with 'Logs' circled in red. The main area shows a table of 'Action Items' with columns for Record No, Title, Assignee, and Due Date. The first row is highlighted in blue. A red arrow points from this row to the 'Record Details' panel on the right, specifically to the 'Status' field which is also circled in red.

Record No	Title	Assignee	Due D
AI-00165	Test Action Item		05/0
AI-00164	test 1		05/0
AI-00163	test 1		05/0
AI-00162	Chris Hare		04/1
AI-00161	Carol Amistadi _ PPH		04/1
AI-00160	Winnie Agbalevu		04/1
AI-00159	Katie Marie		04/1
AI-00158	Ben Posey		04/1
AI-00157	katie		04/1
AI-00156	DAVE BILLS		04/1
AI-00155	Emily Rinear		04/1
AI-00154	Katie Tuttle		04/1
AI-00153	STUDENT 4		03/3

**Record Details**

**General**

Organization: Department of Administrative Services  
Record Number: AI-00165  
Project Number: OCI-090004  
Creator: Katie Tuttle  
Project Name: OAKS CI Training 4  
Creation Date: 05/02/2017 10:20 AM (UTC-8)  
Project Location: 4200 Surface Road  
Title: Test Action Item  
Status: Pending  
Assignee:   
Priority: Medium  
Meeting Minute:   
Due Date: 05/09/2017 10:05 AM (UTC-8)

# Workflow Progress

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

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Katie Tuttle'. The breadcrumb trail shows 'Agency > OAKS CI Training > OAKS CI Training 4'. The main content area is divided into two sections: 'Action Items' and 'Workflow Progress'.

**Action Items Table:**

Record No	Title	Assignee	Due Date
AI-00165	Test Action Item		05/09/2017
AI-00164	test 1		05/01/2017
AI-00163	test 1		05/01/2017
AI-00162	Chris Hare		04/19/2017
AI-00161	Carol Amistadi _ PPH		04/19/2017
AI-00160	Winnie Agbalevu		04/14/2017
AI-00159	Katie Marie		04/19/2017
AI-00158	Ben Posey		04/19/2017
AI-00157	katie		04/13/2017
AI-00156	DAVE BILLS		04/13/2017
AI-00155	Emily Rinear		04/12/2017
AI-00154	Katie Tuttle		04/14/2017
AI-00153	STUDENT 4		03/30/2017
AI-00152	Student 2	Student 1	04/27/2017
AI-00151	Student 6		03/30/2017

**Workflow Progress Section:**

Record Details: **Workflow Progress** (indicated by a red arrow)

Workflow Progress Summary:

Title	Record Number	Current Step	BP Setup Used
Test Action Item	AI-00165	Response	Action Items

Filter By: All Steps

Step-by-step details table:

Step Name	Assignee	Status	Action
Creation	Katie Tuttle	Completed	Send
Response	Steve Mayo	Not Started	
Response	Oaks Instructor	Not Started	
Response	Bill Schwertfager	Not Started	
Response	Rita Nichols	Not Started	
Review			
Response Support			
Delegate Response			
End			

# Create a New Record In Logs



# Create a New Record

- ▶ Click on the Record Type you wish to create under Logs, then click the “Create” button

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier (Development)', and the user name 'Katie Tuttle'. The breadcrumb trail is 'Agency > OAKS CI Training > OAKS CI Training 4'. The left sidebar has 'Action Items' highlighted under the 'Logs' category. The main content area is titled 'Action Items' and features a '+ Create' button circled in red, with a red arrow pointing to it. Below the button is a table of records.

Record No	Title	Assignee	Due Date	Priority	Creation Date	Status
AI-00165	Test Action Item		05/09/2017	Medium	05/02/2017	Pending
AI-00164	test 1		05/01/2017	Medium	04/24/2017	Pending
AI-00163	test 1		05/01/2017	Medium	04/24/2017	Pending
AI-00162	Chris Hare		04/19/2017		04/12/2017	Pending
AI-00161	Carol Amistadi _ PPH		04/19/2017	Medium	04/12/2017	Pending
AI-00160	Winnie Agbalevu		04/14/2017	Medium	04/12/2017	Pending
AI-00159	Katie Marie		04/19/2017	Medium	04/12/2017	Pending
AI-00158	Ben Posey		04/19/2017	Medium	04/12/2017	Pending
AI-00157	katie		04/13/2017		04/06/2017	Pending
AI-00156	DAVE BILLS		04/13/2017	Medium	04/06/2017	Pending
AI-00155	Emily Rinear		04/12/2017	Medium	04/05/2017	Closed
AI-00154	Katie Tuttle		04/14/2017	Medium	04/05/2017	Closed
AI-00153	STUDENT A		03/30/2017		03/23/2017	Closed

Total: 165

# IMPORTANT VIEW NOTICE

- ▶ The UI (User Interface) button in the upper right hand corner of your screen should NOT be blue. This will change how you view the system. To disable click the blue button, it should turn gray

The left screenshot shows a browser window with a red arrow pointing to a blue UI button in the top right corner. The right screenshot shows the same browser window with a green arrow pointing to a gray UI button in the top right corner. Below the screenshots is a table with columns for 'Late', 'Not Started', and 'In Progress'.

	Late	Not Started	In Progress
	0	1	0
	0	12	18
	0	7	15
	0	1	1
	0	0	2
	25	0	0

# Add Information to the Record

- ▶ Fill out all required information in the General Tab
  - ▶ Required information is marked with a red \*
- ▶ Attach any necessary documentation

The screenshot shows a web browser window titled "Action Items - Test Action Item - Project No. OCI-090004 - Mozilla Firefox". The address bar shows the URL: [https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=uai&fromSource=text&fromModelId=1010&module\\_name=ua](https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=uai&fromSource=text&fromModelId=1010&module_name=ua). The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". The "Workflow Actions" bar contains "Send", "Save", "Spelling..", "Undo Accept Tas", "Add Attachment" (circled in red), and "Close Window".

The main content area is divided into two tabs: "Action Items" (selected) and "Action Items". The "General" tab is active, displaying the following fields:

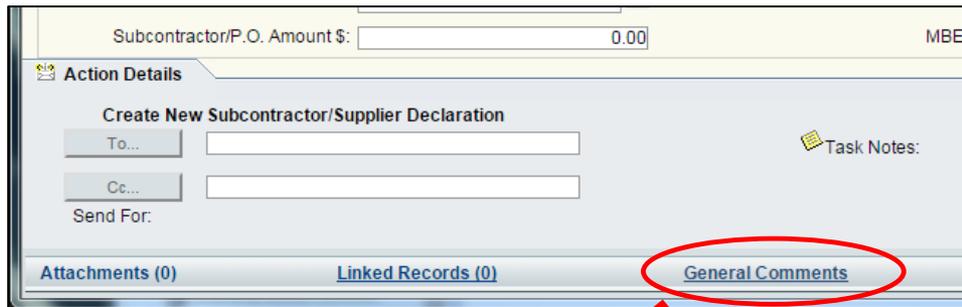
Organization:	Department of Administrative Services	Record Number:	
Project Number:	OCI-090004	Creator:	Katie Tuttle
Project Name:	OAKS CI Training 4	Creation Date:	
Project Location:	4200 Surface Road	Status:	
Title:	Test Action Item *	Priority:	Medium
Assignee:		Due Date:	07/05/2017 10:48 AM (UTC-8) *
Meeting Minute:			

The "Action" tab is also visible, showing a text area for "Action Requested" with the text: "Please review the document and add any comments as necessary".

At the bottom of the page, there are sections for "Action Details", "Collaboration", "Linked Records (0)", and "Linked Mail (0)".

# Add General Comments

- ▶ General Comments are a good way to communicate with team members about a specific record
  - ▶ Click the General Comments link located on the bottom of the record
  - ▶ Click Add
  - ▶ Enter Comments and Click OK
- ▶ General Comments become a permanent part of the record



Subcontractor/P.O. Amount \$:  MBE:

**Action Details**

Create New Subcontractor/Supplier Declaration

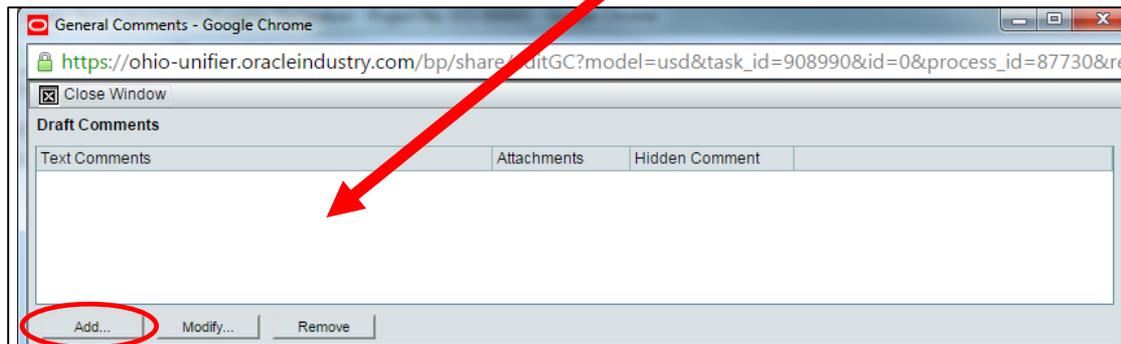
To...

Cc...

Send For:

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

Task Notes:



General Comments - Google Chrome

[https://ohio-unifier.oracleindustry.com/bp/share/editGC?model=usd&task\\_id=908990&id=0&process\\_id=87730&re](https://ohio-unifier.oracleindustry.com/bp/share/editGC?model=usd&task_id=908990&id=0&process_id=87730&re)

Close Window

**Draft Comments**

Text Comments	Attachments	Hidden Comment
<input type="text"/>		

[Add...](#) [Modify...](#) [Remove](#)

# Send the Record

- ▶ Verify Workflow Action
- ▶ Click Send
- ▶ This record now becomes a Task for users in the “To” box

Workflow Actions | Send | Send | Save | Spelling.. | Undo Accept Task | Add Attachment | Close Window

**Action Items**

**General**

Organization: Department of Administrative Services | Record Number: |  
Project Number: OCI-090004 | Creator: Katie Tuttle  
Project Name: OAKS CI Training 4 | Creation Date: |  
Project Location: 4200 Surface Road

**Action Details**

**Send**

To... | Bill Schwertfager,Oaks Instructor,Rita Nichols, |  
Cc... | |  
Send For: Response

Task Notes:

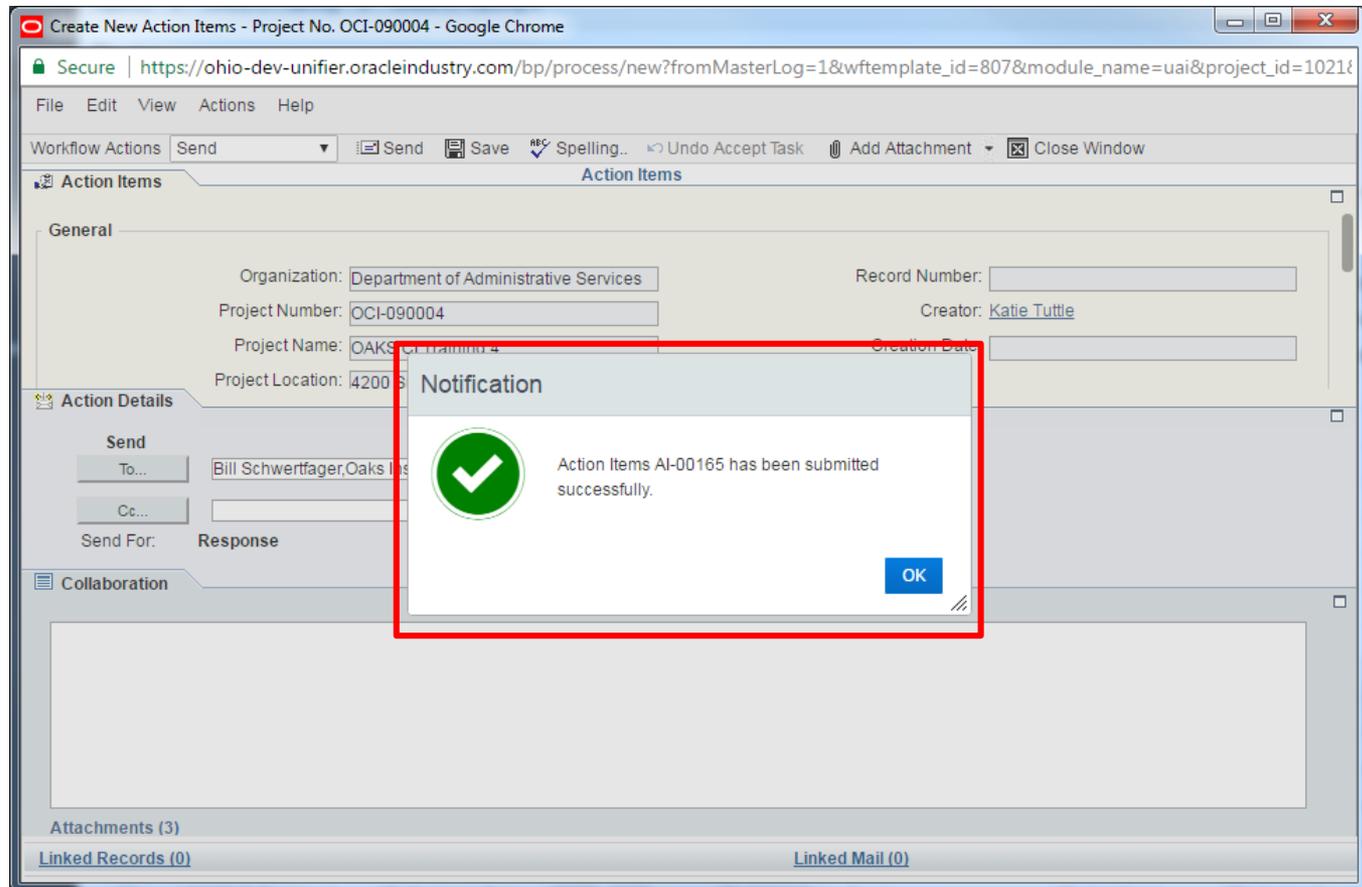
**Collaboration**

Attachments (3) | Linked Records (0) | Linked Mail (0)

These recipients will receive a Task

# Successful Submission

- ▶ You should receive a notification that your record has been submitted successfully
- ▶ If you receive an error and need assistance, please contact the OAKS CI Support Desk ([oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov))



# Working with Tasks



# Task Email Notification

- ▶ When you have a task to complete in OAKS CI, you will receive a notification via Email
- ▶ You can click the Unifier Login button to access the OAKS CI system and your task

Fri 7/20/2018 1:10 PM

Unifier - shauna hooks, soo <unifier\_notifications@oracle.com>  
Action Items K12 AI-0002 is sent to you for Response.

To: Hooks, Shauna

If there are problems with how this message is displayed, click here to view it in a web browser.

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

**Project/Shell: Oak Hills Local SD Building 2**

**Action Items K12 AI-0002 is sent to you for Response.**

From :	shauna hooks
Sent For :	Response
Source Name :	Oak Hills Local SD Building 2
Record No :	Action Items K12 AI-0002
Title :	AI 001 - Increase Footing Depth

[Unifier Login](#)

Click here to access your Task

# Task Email Notification

The link will take you to your task list within the appropriate project

- ▶ Double click to the Open the Task

The screenshot displays the Primavera Unifier web application interface. The browser address bar shows the URL: [https://ohio-dev-unifier.oracleindustry.com/bp/route/2/i-project\\_tasks?\\_\\_uref=uuu93945304&m=user&p=1088&k=project\\_tasks&id=196601](https://ohio-dev-unifier.oracleindustry.com/bp/route/2/i-project_tasks?__uref=uuu93945304&m=user&p=1088&k=project_tasks&id=196601). The application title is "ORACLE Primavera Unifier (Development)".

The main content area is titled "Tasks" and displays a table of tasks. The table has the following columns: Origin, Business Process, Record Number, Title, Record Due, and From. The tasks listed are:

Origin	Business Process	Record Number	Title	Record Due	From
Oak Hills Local SD Bui...	Action Items K12	AI-0003	Oracle072018a	07/25/2018 05:00...	shaun:
Oak Hills Local SD B...	Action Items K12	AI-0002	AI 001 - Increase ...	07/20/2018 05:00 ...	shaun:
Oak Hills Local SD B...	Action Items K12	AI-0001	AI 001 - Increase ...	07/20/2018 05:00 ...	Shaun:

The right-hand panel, titled "Record Details", shows the following information:

- General**
- Project Number:** SFC-169999.99
- Project Name:** Oak Hills Local SD B...
- Organization Name:** Akron CSD Segmer
- Facility Name:**
- Title:** Oracle072018a
- Assignee:**
- Meeting Minute:**
- Action**
- Action Requested:** Oracle072018a
- Response:**
- Review Response:**

The bottom of the screen shows a "Total: 3" indicator and the "together" logo.

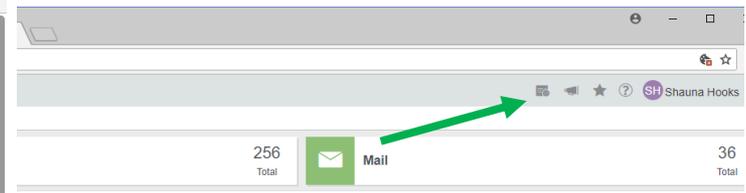
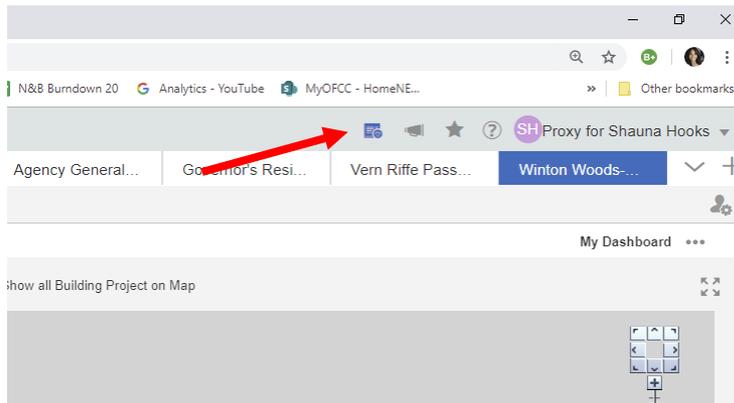
# Task

**IMPORTANT NOTE:** Prior to opening your Task ensure that the UI (User Interface) button is disabled

**IMPORTANT NOTE:** Prior to opening your Task ensure that the UI (User Interface) button is disabled

# Reviewing Tasks

- ▶ **IMPORTANT NOTE:** Prior to opening your Task ensure that the UI (User Interface) button is disabled
- ▶ The UI (User Interface) button in the upper right hand corner of your screen should NOT be blue. This will change how you view the system. To disable click the blue button, it should turn gray



35565

	Late	Not Started	In Progress
	0	1	0
	0	12	18
	0	7	15
	0	1	1
	0	0	2
	25	0	0

# Click “Accept Task”

- ▶ Once you open your Task, click “Accept Task” to begin work on the record

Change Order - Test Proposal

Secure | <https://ohio-de...> | [only=0&project\\_id=1021&\\_uref=uuu838:navigator-](#)

File Edit View **Actions** Help

**Accept Task** Decline Task SOV Review Close Window

General Change Order

General

Organization: Department of Administrative Services Record Number: CO-0021  
Project Number: OCI-090004 Creator: Katie Tuttle  
Project Name: OAKS CI Training 4 Creation Date: 05/02/2017 08:12 AM (UTC-8)

**Task Details**

From: [Katie Tuttle](#) Task Due Date: Task Notes (0)  
To: [Contractor](#) Task Status: [Not Started](#) Workflow Progress  
Cc:  
Sent For: Proposal Creation

**Line Item List**

Current View: All Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/Supp
-----	-----------	----------	-----------	-------------------	--------	--------------------

Grid Find Show Filtered Total Amount Total Amount: \$0.00

Attachments (0) Linked Records (0) Today Tomorrow Together General Comments Linked Mail (0) 40

# Complete Work

- ▶ Click all tabs and complete any necessary sections and required fields (*denoted with a red \**) or simply review the record

Change Order - Test CO - Project No. OCI-090004 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\_id=186252&model=uco&project\_id=1021&initiateBP=&bulkautoaccept=&fromRefL

File Edit View Actions Help

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

**General** Change Order

**General**

Organization: Department of Administrative Services Record Number: CO-0022

Project Number: OCI-090004 Creator: Katie Tuttle

Project Name: OAKS CI Training 4 Creation Date: 05/02/2017 08:25 AM (UTC-8)

Project Location: 4200 Surface Road Status: Pending

Title: Test CO Trade: HVAC

Contract Reference: dps-090004-01-01 Contractor Name: R. W. Setterlin Building Company

Change Order Type: Proposal Request EDGE Certified Prime?: Yes

Change Order No.: 002 Fee Title:

**Change Order Details**

Description of Work: description of work

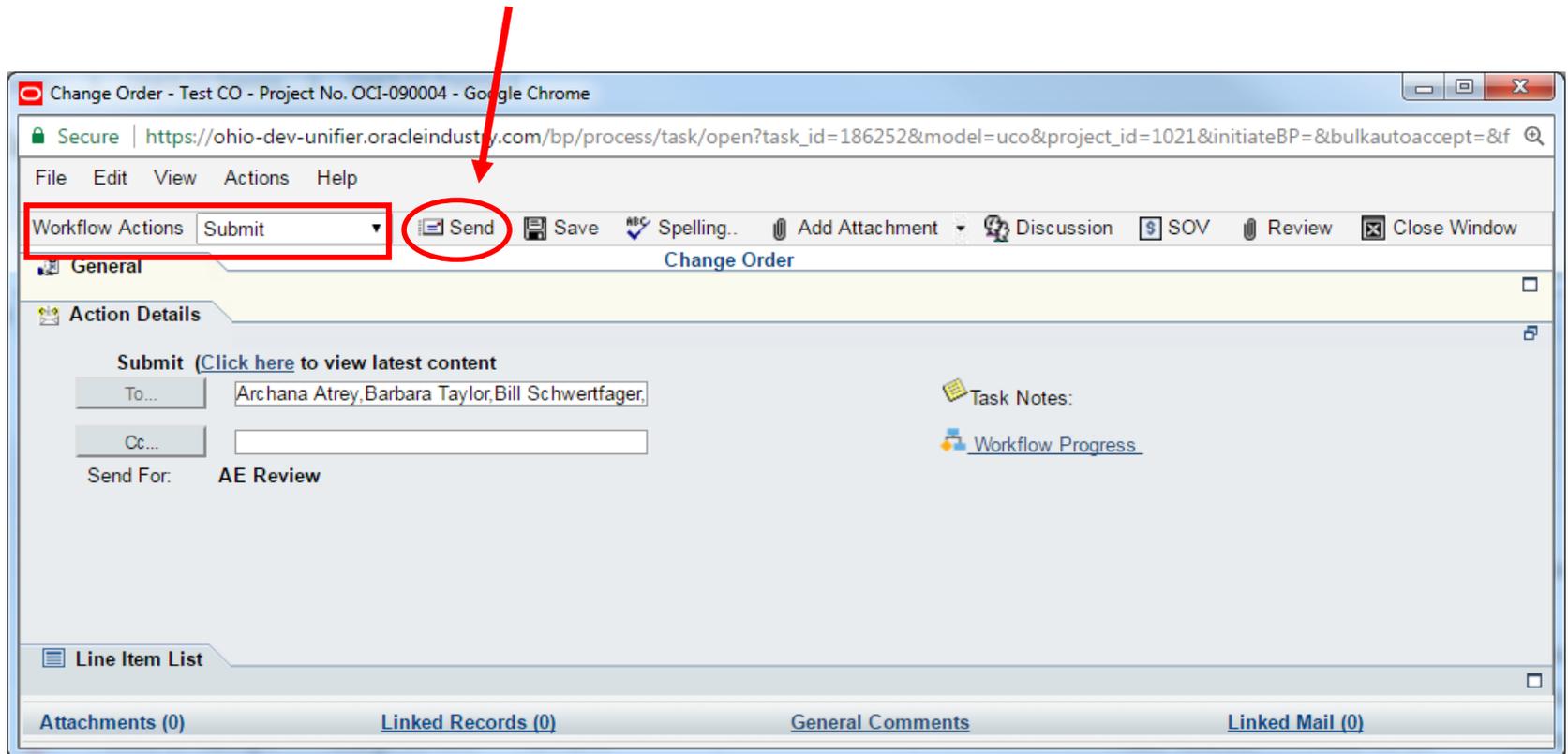
**Action Details**

**Line Item List**

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

# Verify Workflow Action

- ▶ If a Workflow Action isn't already populated:
  - ▶ Choose a Workflow Action from the dropdown menu
  - ▶ Click Send button to submit the record



# Add a Proxy

- ▶ If you will be away from the office for an extended period of time, you have the ability to add someone, from your organization as a Proxy. By proxying in as you, they will have the ability to complete work on your behalf.

# Add a Proxy

- ▶ If you will be away from the office for an extended period of time, you have the ability to add someone, from your organization as a Proxy. By proxying in as you, they will have the ability to complete work on your behalf.
- ▶ To add someone as a Proxy:
  - ▶ Click your name in the upper right hand corner (a)
  - ▶ Click Preferences (b)
  - ▶ Click Proxy (c)
  - ▶ Click the + under, Users who can act as my Proxy (d)

The screenshot shows a web application interface with a top navigation bar and a main content area. The top navigation bar includes a user profile dropdown menu with the following items: "Get Under Mobile App...", "Preferences", "Last login: 08/21/2018 08:22 AM", and "Sign Out". The main content area is divided into two sections: "Workflow Business Processes" and "Non - Workflow Business Processes". The "Workflow Business Processes" section includes a pie chart with 562 total items, categorized by status: Late (red), Not Started (yellow), and In Progress (green). The "Non - Workflow Business Processes" section includes a horizontal bar chart with 421 total items, categorized by status: Late (red), Not Started (yellow), and In Progress (green). The "Preferences" dialog box is open, showing the "Proxy" tab. The "Proxy" tab includes a checkbox for "Do not allow Proxies", a "My Proxy" section with "I am Proxy" and "Proxy Login History" options, and a "Users who can act as my Proxy" section. The "Users who can act as my Proxy" section has a table with columns for "Name", "Email", and "Proxy Status". A "+" button is located to the left of the table, and a blue arrow points to it from the label "d".

# Add a Proxy

- ▶ Click the Select button next to Grant Proxy Access To\* (a)
- ▶ Click the person you would like to grant Proxy access (b)
- ▶ Click Select (c)

Proxy User ×

Proxy User Settings

Grant Proxy Access To \* ⌵ **a**

Start Date/Time  
MM/DD/YYYY HH:MM AM 📅

End Date/Time  
MM/DD/YYYY HH:MM AM 📅

Status  
 Inactive  Active

Cancel OK

User Picker ×

Search | Find on Page

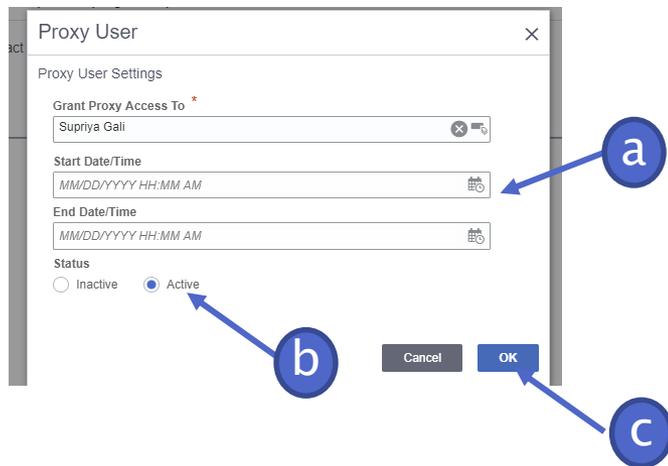
Name	First Name	Last Name	Company	E-Mail
<b>OE</b> OSU External CM	OSU	External CM	State of Ohio	yu.195@osu.edu
<b>MF</b> MUN Facility Contracting ...	MUN	Facility Contracting Offi...	State of Ohio	xxx@das.state.oh.us
<b>RF</b> Richard Feldmiller	Richard	Feldmiller	State of Ohio	rfeldmiller@ysu.edu
<b>MF</b> MUN Finance & Business...	MUN	Finance & Business Se...	State of Ohio	xxx@das.state.oh.us
<b>CF</b> CLS Fiscal	CLS	Fiscal	State of Ohio	xxx@das.state.oh.us
<b>OF</b> OSU Fiscal Officer	OSU	Fiscal Officer	State of Ohio	sosa.7@osu.edu
<b>CF</b> Cyndi Fout	Cyndi	Fout	State of Ohio	fout.9@osu.edu
<b>AF</b> Anne Frost	Anne	Frost	State of Ohio	anne.frost@ofcc.ohio.gov
<b>WF</b> WSU Fund Manager	WSU	Fund Manager	State of Ohio	xxx@das.state.oh.us
<b>OF</b> OSU Funding Manager	OSU	Funding Manager	State of Ohio	sosa.7@osu.edu
<b>SG</b> Supriya Gali	Supriya	Gali	State of Ohio	supriya.gali@ofcc.ohio...
<b>SG</b> Shiva Gannerla	Shiva	Gannerla	State of Ohio	shiva.gannerla@ofcc.o...
<b>SG</b> SAO General Contractor	SAO	General Contractor	State of Ohio	xxx@das.state.oh.us
<b>UG</b> UC General Council	UC	General Council	State of Ohio	xxx@uc.edu
<b>BO</b> Brett Gundlach	Brett	Gundlach	State of Ohio	brett.gundlach@ofcc.oh...
<b>RH</b> Rhonda Hagemeier	Rhonda	Hagemeier	State of Ohio	rhonda.hagemeier@of...

Total: 310

Cancel Select **c**

# Add a Proxy

- ▶ You have the option to choose and start and end period (a)
- ▶ Or you may simply set them to Active (b)
- ▶ Click OK (c)



# Proxy in as a User

- ▶ To proxy in as User whom has provided you permission, please see below:
- ▶ Proxy in as another OAKS CI user:
  - ▶ Click your name in the upper right hand corner (a)
  - ▶ Click Proxy For – Choose Person (b)

The screenshot shows a web application interface. In the top right corner, the user's name 'shauna hooks' is displayed next to a dropdown arrow. A blue arrow labeled 'a' points to this name. The dropdown menu is open, showing options: 'Get Unifier Mobile App', 'Preferences', 'Proxy For', and 'Last login: 08/28/2018 02:23 PM'. A blue arrow labeled 'b' points to the 'Proxy For' option. Below the dropdown, a user card for 'Sara Freetage' is visible. The main content area shows a 'Workflow Business Processes' section with a table of business processes. A pie chart on the left shows 562 items, with a legend for 'Late' (red), 'Not Started' (yellow), and 'In Progress' (green). A 'Notifications' bar at the top shows 1,486 active and 256 total notifications. A 'Mail' icon shows 256 total. A 'Display 100 Items Per Page' dropdown is also visible.

Business Process	0	0	2
72 Hour Notice	25	0	0
Action Items	0	0	1
Change Order			
Contract			
Contract Schedule of Values			
Design Reviews	0	6	3
Meeting Minutes	0	4	0
Professional Services Agreements	0	15	1
Professional Services Amendments			
Professional Services Pay Request			

# Job Aids

- ▶ For additional reference materials visit our website [ofcc.ohio.gov](http://ofcc.ohio.gov)
- ▶ Click: OAKS CI -> Choose an Appropriate training

The screenshot shows the OFCC (Ohio Facilities Construction Commission) website. The browser address bar displays [ofcc.ohio.gov/OAKSCI.aspx](http://ofcc.ohio.gov/OAKSCI.aspx). The OFCC logo is prominently displayed at the top left. A navigation menu includes 'About', 'Documents', 'Services / Programs', 'News / Events', 'Opportunities', 'OAKS CI', 'Resources', and 'Gallery'. The 'OAKS CI' menu item is circled in red, with a red arrow pointing to it. Below the navigation menu, a sidebar on the left lists various services, including 'OAKS CI News' and 'Email OAKS CI Support'. The main content area is titled 'OAKS Capital Improvements (OAKS CI)' and provides a brief description of the system. Below this, there are three columns of training and login options: 'Agency/Higher Ed', 'K-12 Cloud System', and 'K-12 Legacy System'. Each column contains buttons for 'User Login' and 'Training'. A red box highlights the 'Agency/Higher Ed Training' button in the first column, with a red arrow pointing to it from the left. At the bottom of the page, there is a 'Contacts & Forms' section with contact information for OAKS CI Support and a list of forms and resources.

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211