



Introduction to OAKS CI

August, 2018

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

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](#)

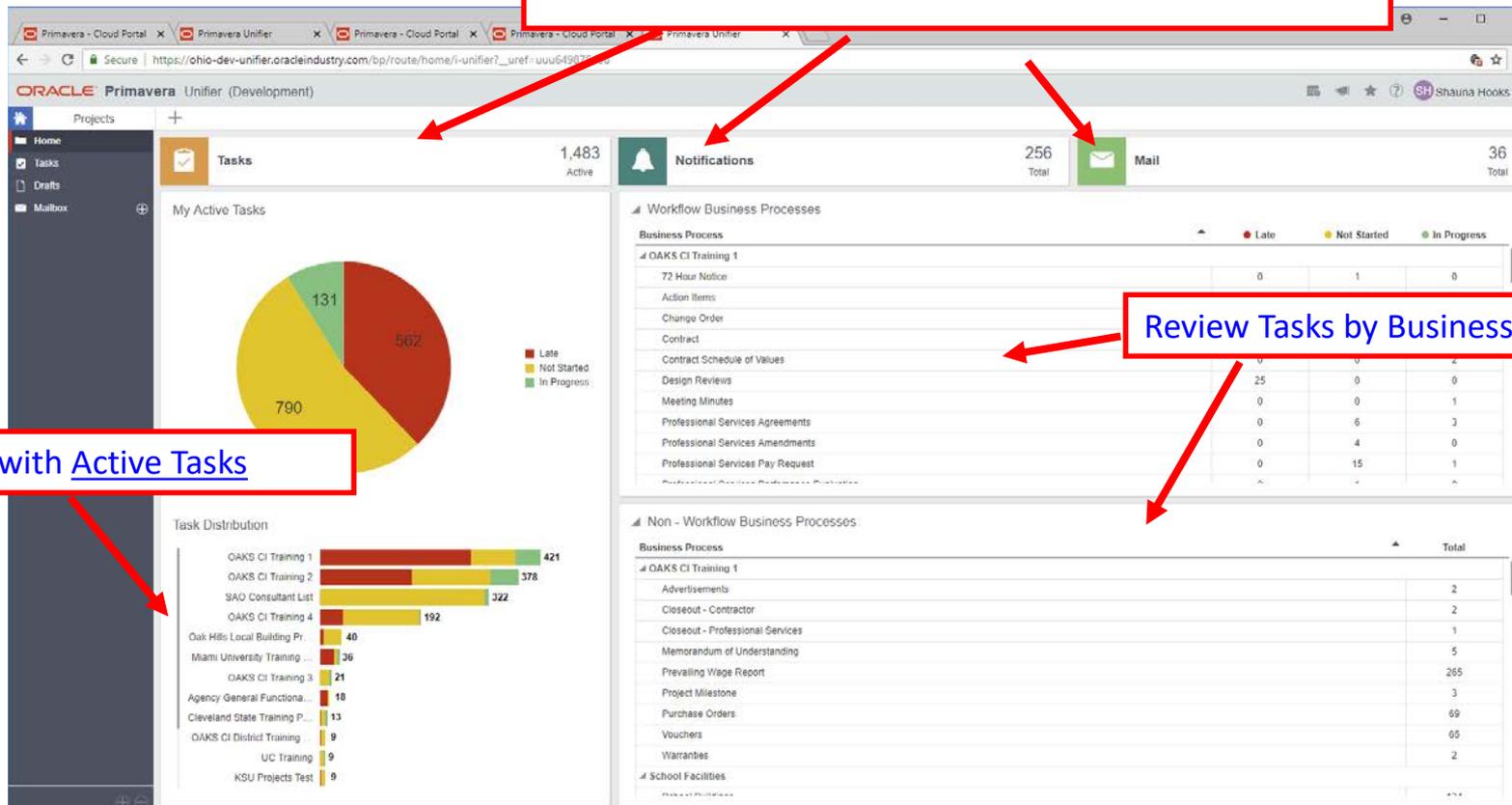
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Version 16.2 09-19-2016.1612 0f9c0f8

Home Page

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

Quick Links-

- All Task's
- All Notifications- Records for which you have been cc'd (no action required)
- All Umails- internal project mail sent to you



Projects with Active Tasks

Project	Count
OAKS CI Training 1	421
OAKS CI Training 2	378
SAO Consultant List	322
OAKS CI Training 4	192
Oak Hills Local Building Pr...	40
Miami University Training ...	36
OAKS CI Training 3	21
Agency General Functiona...	18
Cleveland State Training P...	13
OAKS CI District Training ...	9
UC Training	9
KSU Projects Test	9

Review Tasks by Business Process

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

Finding your Project

- ▶ To locate your project, click on the Plus sign to the right of the project tabs
- ▶ When the second screen pops up, type your project number or type the Project Name then click the magnifying glass to search
- ▶ Click the appropriate project to select it

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier (Development)', and user information 'Katie Tuttle' with a star icon, a question mark icon, and a 'Sign Out' link. Below the navigation bar, a tab labeled 'OAKS CI Trainin...' is visible, with a red circle highlighting a plus sign (+) to its right. A search modal window is open, showing a search bar with 'OCI' entered and a magnifying glass icon. Below the search bar is a table with the following data:

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

At the bottom left of the search modal, it says 'Total: 9'. To the right of the search modal, a 'Record Details' panel is visible, showing information for a project:

Record Details Workflow Prog

General

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
Contractor Name: R. W. Setterlin Building Company

Change Order Type: EDGE Certified
GMP Subcontract: Prime?

School District Project Home Page

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

The screenshot displays the Primavera Unifier web application interface. The browser tabs at the top show multiple instances of 'Primavera - Cloud Portal' and 'Primavera Unifier'. The address bar indicates the URL: 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 highlighted with a red box, and two red arrows point to the 'Tasks' and 'Logs' items. The main content area shows the project details for 'Oak Hills Local SD Building 2 - Home'. The 'Summary' tab is active, displaying an 'Image' placeholder. The 'Details' section at the bottom provides 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 lists 'Tasks', 'Notifications', 'Draft Records', and 'uMails'. The 'Links' section contains a link labeled 'QFCC'.

Tasks – Switch to Standard View

- ▶ Click **Tasks** in the dark gray menu to the left

The screenshot displays the Primavera Unifier web application interface. The browser tabs at the top show multiple instances of 'Primavera - Cloud Portal' and 'Primavera Unifier'. The address bar indicates the URL: https://ohio-dev-unifier.oracleindustry.com/bp/route/13/i-projectname?_uref=uuu649875198#. The page title is 'ORACLE Primavera Unifier (Development)'. The main navigation bar includes 'Projects' and 'Oak Hills Local ...'. A dark gray sidebar on the left contains a menu with items: 'Oak Hills Local SD B...', 'Alerts', 'Tasks' (highlighted with a red box), 'Drafts', 'Mailbox', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', and 'Reports'. The main content area shows the breadcrumb 'School Facilities > OAKS CI District ... > Oak Hills Local S...' and the page title 'Oak Hills Local SD Building 2 - Home'. Below this is a 'Summary' section with an 'Image' placeholder. A 'Details' section at the bottom provides project 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' with links for 'Tasks', 'Notifications', 'Draft Records', and 'uMails', and a 'Links' section with a link for 'OFCC'.

Tasks (Your Work)

- ▶ Tasks are records that come to you for your review or approval
 - ▶ An example of a Task could be, a Submittal that was created in Logs by the Contractor and submitted to the A/E for review
- ▶ Double Click on the Task to open

The screenshot displays the Oracle Primavera Unifier interface. The left sidebar shows a navigation menu with 'Tasks' highlighted in red. The main area shows a list of tasks with columns: Origin, Business Process, Record Number, Title, and Record Due. The first task row is highlighted in red. The right panel shows the 'Record Details' for the selected task.

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...	

Record Details

General

Organization	Record Number
Department of Administrative Services	AI-00164
Project Number	Creator
OCI-090004	Sauna Hooks
Project Name	Creation Date
OAKS CI Training 4	04/24/2017 09:15 AM (UTC-8)
Project Location	
4200 Surface Road	
Title	Status
test 1	Pending
Assignee	Priority
	Medium
Meeting Minute	Due Date
	05/01/2017 09:14 AM (UTC-8)

Action

Action Requested
test

Response

Mailbox

- ▶ Your mailbox houses:
 - ▶ Notifications - any records that you've been Carbon Copied on
 - ▶ Example - ****Meeting Minutes** will always be found in your Notification box**
 - ▶ Project email- any email messages sent and/or received by you in OAKS CI

The screenshot displays the Primavera Unifier web application interface. The browser tabs at the top show multiple instances of 'Primavera - Cloud Portal' and 'Primavera Unifier'. The address bar indicates the URL: https://ohio-dev-unifier.oracleindustry.com/bp/route/13/i-projectname?__uref=uuu649875198#. The main header shows 'ORACLE Primavera Unifier (Development)'. The left sidebar contains a navigation menu with items like 'Projects', 'Alerts', 'Tasks', 'Drafts', 'Mailbox', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', and 'Reports'. The 'Mailbox' item is highlighted, and a red arrow points to it. A dropdown menu is open under 'Mailbox', listing 'Drafts', 'Inbox', 'Notifications', 'Sent Items', 'Project Mailbox', and 'Deleted Items'. A red box highlights the 'Notifications' and 'Project Mailbox' options. The main content area shows project details for 'OAKS CI District Training Project 1 - Home'. The project summary includes: SFC-080001, OAKS CI District Training Project 1, Renovate Berkshire Middle to house 999 6-8 students in a 140,859 square foot facility, Kaylie Ruff, United States Dollar (USD), Active, and email: ohio_unifier_dev+1084@oracleindustry.com. Below the summary is a table with columns: 'Image', 'Setup Date', 'Setup Template', and 'Status'. The table contains two rows of data.

Image	Setup Date	Setup Template	Status
ding 2	03/07/2016	OSFC Building CMR Template	Active
g Project	07/22/2015	OSFC Building CMR Template	Active

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 displays the Oracle Primavera Unifier web application. The browser tabs at the top show 'Primavera - Cloud Portal' and 'Primavera Unifier'. The address bar indicates the URL: https://ohio-dev-unifier.oracleindustry.com/bp/route/13/i-projectname?__uref=uuu649875198#. The page title is 'ORACLE Primavera Unifier (Development)'. The left sidebar contains a navigation menu with items like 'Projects', 'Oak Hills Local SD B...', 'Alerts', 'Tasks', 'Drafts' (highlighted with a red box), 'Mailbox', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', and 'Reports'. The main content area shows the 'Oak Hills Local SD Building 2 - Home' project page. The 'Summary' tab is active, displaying an 'Image' placeholder. On the right, there are sections for 'Items Requiring Your Attention' (with links for Tasks, Notifications, Draft Records, and uMails) and 'Links' (with a link for OFCC). The 'Details' section at the bottom provides project information:

Details	
Number:	SFC-169999.99
Name:	Oak Hills Local SD Building 2
Description:	Test building project
Administrator:	Barbara Taylor
Currency:	United States Dollar (USD)

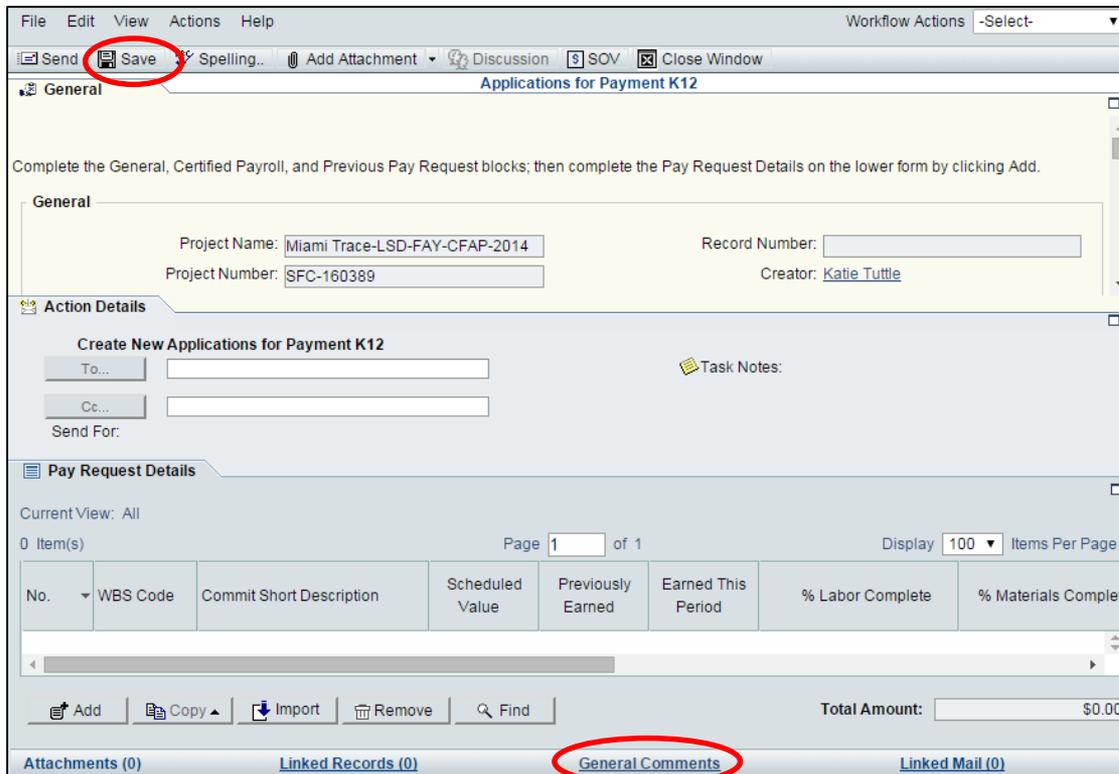
Drafts and Timeout



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 application interface. The 'Save' button in the top toolbar is circled in red. 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), Project Number (SFC-160389), Record Number, 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 'General Comments' link at the bottom is also circled in red.

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

Document Manager

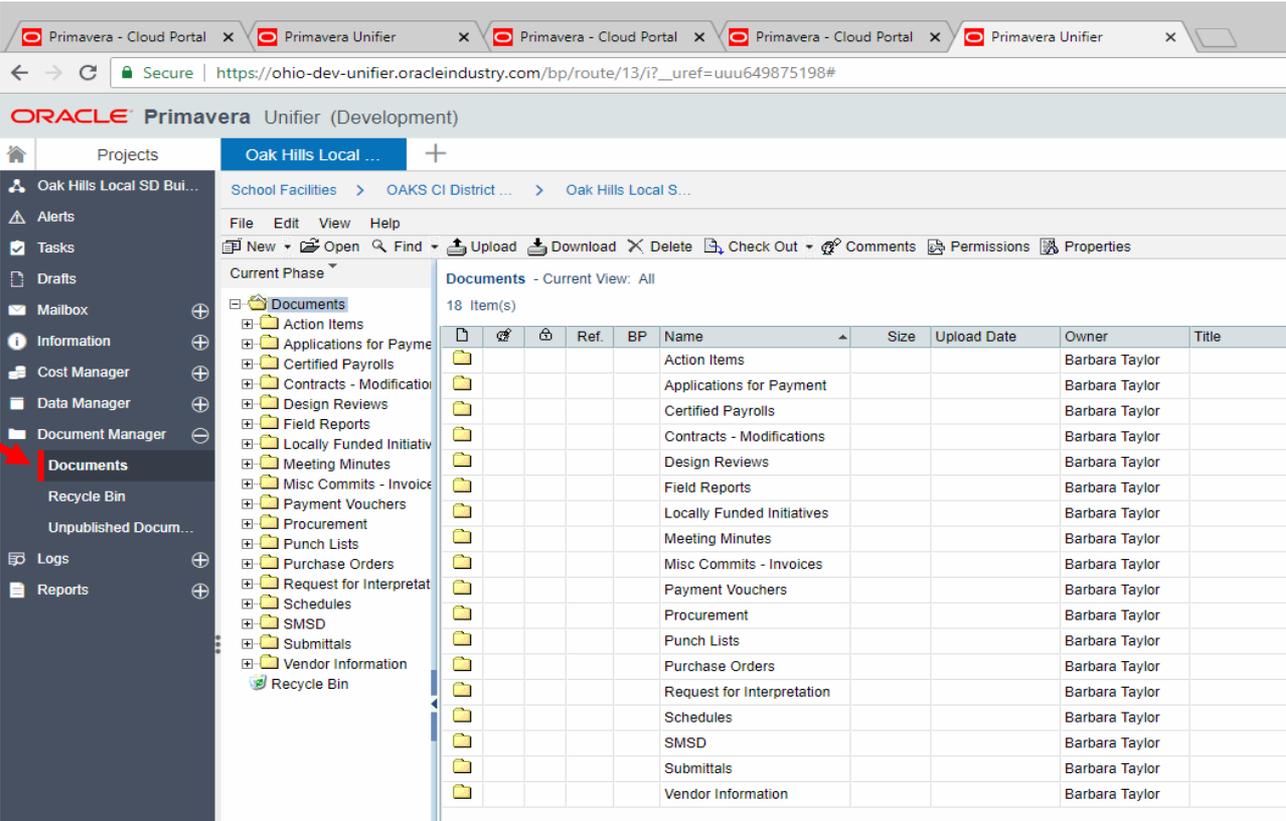
- ▶ Click Document Manager -> Documents in the dark gray menu to the left

The screenshot shows the Oracle Primavera Unifier web application interface. The left sidebar menu is highlighted, showing 'Document Manager' and 'Documents' selected. The main content area displays a list of documents with columns for Name, Size, Upload Date, Owner, and Title.

Ref.	BP	Name	Size	Upload Date	Owner	Title
		Action Items			Barbara Taylor	
		Applications for Payment			Barbara Taylor	
		Certified Payrolls			Barbara Taylor	
		Contracts - Modifications			Barbara Taylor	
		Design Reviews			Barbara Taylor	
		Field Reports			Barbara Taylor	
		Locally Funded Initiatives			Barbara Taylor	
		Meeting Minutes			Barbara Taylor	
		Misc Commits - Invoices			Barbara Taylor	
		Payment Vouchers			Barbara Taylor	
		Procurement			Barbara Taylor	
		Punch Lists			Barbara Taylor	
		Purchase Orders			Barbara Taylor	
		Request for Interpretation			Barbara Taylor	
		Schedules			Barbara Taylor	
		SMSD			Barbara Taylor	
		Submittals			Barbara Taylor	
		Vendor Information			Barbara Taylor	

About Document Manager

- ▶ Document manager houses all supporting documentation for the project
- ▶ The utilization of Document Manager will differ based on your particular project
- ▶ For more information on uploading and attaching documents, please refer to the Document Manager Job Aids on our website: <http://ofcc.ohio.gov/OAKSCI.aspx>
- If you have any questions about where to store documents please contact your OFCC OR Agency Project Manager or Project Coordinator



The screenshot shows the Oracle Primavera Unifier (Development) interface. The browser address bar indicates the URL: https://ohio-dev-unifier.oracleindustry.com/bp/route/13/i?_uref=uuu649875198#. The interface displays a navigation pane on the left with a red arrow pointing to the 'Documents' menu item. The main content area shows a list of documents under the 'Current Phase' view, with 18 items listed. The table below represents the data shown in the screenshot.

Ref.	BP	Name	Size	Upload Date	Owner	Title
		Action Items			Barbara Taylor	
		Applications for Payment			Barbara Taylor	
		Certified Payrolls			Barbara Taylor	
		Contracts - Modifications			Barbara Taylor	
		Design Reviews			Barbara Taylor	
		Field Reports			Barbara Taylor	
		Locally Funded Initiatives			Barbara Taylor	
		Meeting Minutes			Barbara Taylor	
		Misc Commits - Invoices			Barbara Taylor	
		Payment Vouchers			Barbara Taylor	
		Procurement			Barbara Taylor	
		Punch Lists			Barbara Taylor	
		Purchase Orders			Barbara Taylor	
		Request for Interpretation			Barbara Taylor	
		Schedules			Barbara Taylor	
		SMSD			Barbara Taylor	
		Submittals			Barbara Taylor	
		Vendor Information			Barbara Taylor	

Logs

- ▶ Logs houses 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 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 sidebar on the left contains a menu with items like 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', and 'Logs'. The 'Logs' item is highlighted with a red box. The main content area shows 'Action Items' with a table of records. A red arrow points from the 'Test Action Item' record in the table to the 'Record Details' panel on the right. The 'Record Details' panel shows 'General' information for the record, including Organization, Record Number, Project Number, Project Name, Project Location, Title, Status, Assignee, Priority, Meeting Minute, and Due Date.

Oracle Primavera Unifier

Katie Tuttle | Sign Out

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

OAKS CI Training 4 - Home

Alerts | Tasks | Notifications | Drafts | uMail | Information | Cost Manager | Data Manager | Document Manager | **Logs**

72 Hour Notice

Action Items

Advertisements

Budget - Initial

Budget - Revisions

Change Order

Closeout - Contractor

Closeout - Professional Serv...

Agency > OAKS CI Training > OAKS CI Training 4

Switch to Classic View

Record Details | Workflow Progress

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)

Action

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

Total: 165

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. On the left, a navigation menu has '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. In the 'Record Details' panel, the 'Status' field is circled in red and shows 'Pending'.

ORACLE PRIMAVERA Unifier Katie Tuttle Sign Out

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

Agency > OAKS CI Training > OAKS CI Training 4

Action Items Switch to Classic View

+ Create Actions View All Records [Refresh] [Print] [Close]

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

Total: 165

Record Details Workflow Progress

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: [Empty]
Priority: Medium

Meeting Minute: [Empty]
Due Date: 05/09/2017 10:05 AM (UTC-8)

Action

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, the text 'PRIMAVERA Unifier', and the user name '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' on the left and 'Record Details' on the right. The 'Record Details' section is currently displaying the 'Workflow Progress' view for record 'AI-00165', which is highlighted with a red arrow. The 'Workflow Progress' view shows a table of steps for the record, with the first step 'Creation' completed and others pending.

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 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 then click the “Create” button

The screenshot displays the Oracle Primavera Unifier (Development) 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 main content area is titled 'Action Items' and features a '+ Create' button circled in red, with a red arrow pointing to it. Below the header is a table of records with columns for Record No., Title, Assignee, Due Date, Priority, Creation Date, and Status. The table contains 16 records, with the first 15 being 'Pending' and the last one 'Closed'. The total number of records is 165.

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

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

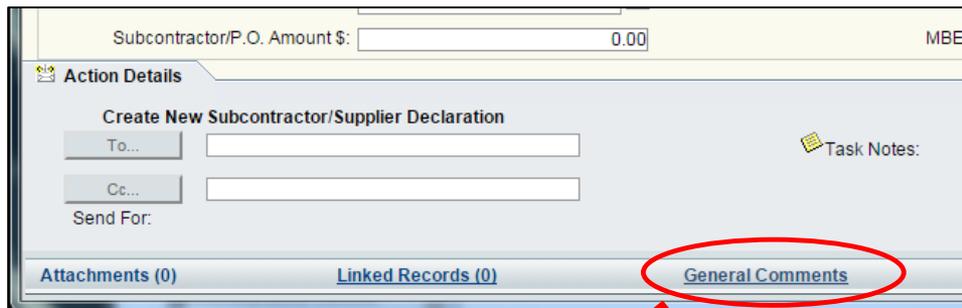
The screenshot shows a web browser window titled "Action Items - Test Action Item - Project No. OCI-090004 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=uai&fromSource=text&fromModelId=1010&module_name=ua. The browser's menu bar includes File, Edit, View, Actions, and Help. The toolbar contains Workflow Actions, Send, Save, Spelling, Undo, Accept, Add Attachment (circled in red), and Close Window. The main content area is divided into tabs: Action Items (selected), Action Details, and Collaboration. The "General" tab is active, displaying a form with 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:	Select...		

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".

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

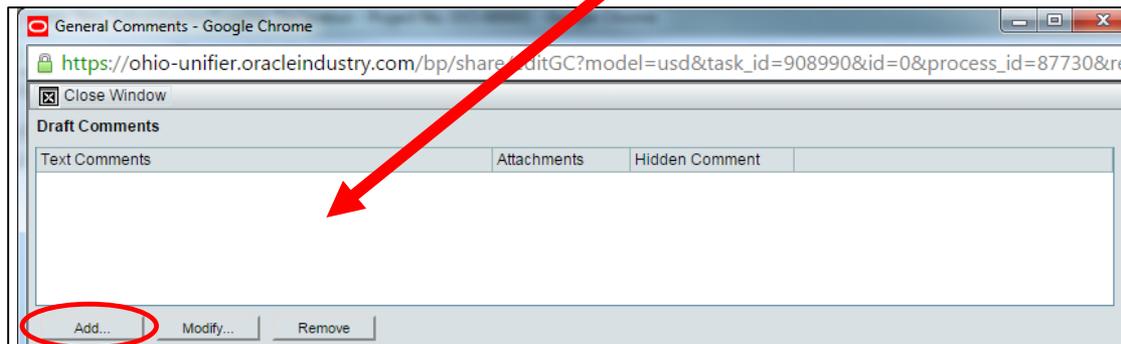
To...

Cc...

Send For:

Task Notes:

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



General Comments - Google Chrome

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

Create New Action Items - Project No. OCI-090004 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bsp/process/new?fromMasterLog=1&wftemplate_id=807&module_name=uai&project_id=1021

File Edit View Actions Help

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)

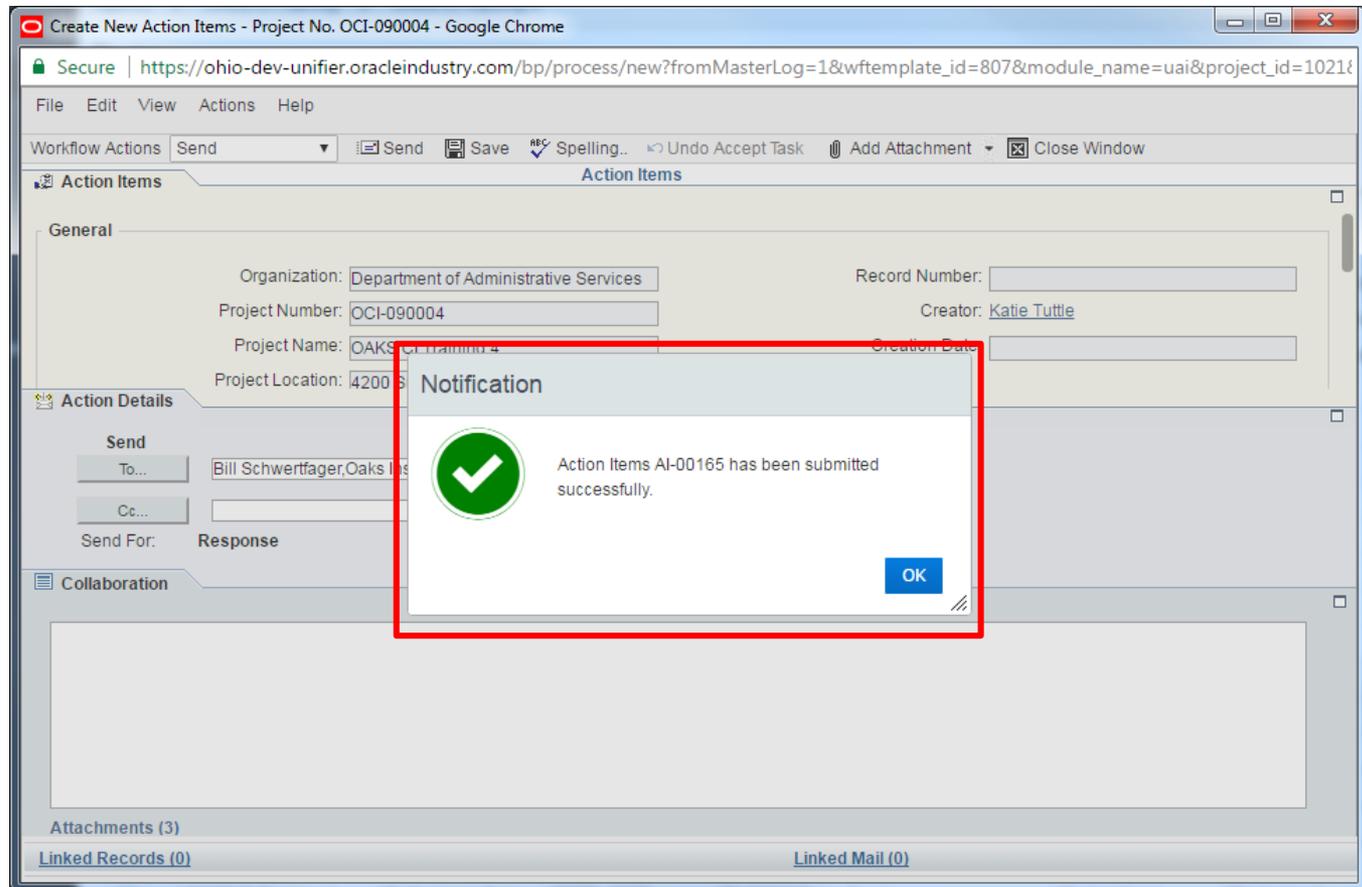
Linked Records (0)

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)



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

File Message McAfee E-mail Scan Tell me what you want to do

Ignore Delete Archive Reply Reply All Forward Meeting IM Team E-mail Done To Manager Reply & Delete Create New Move OneNote Actions Assign Mark Categorize Follow Policy Unread Tags Translate Find Related Select

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. The application header shows 'ORACLE Primavera Unifier (Development)'. The navigation sidebar on the left includes options like Alerts, Tasks (highlighted), Drafts, Mailbox, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. The main content area is titled 'Tasks' and shows a table of tasks. The table has columns for 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 shows 'Record Details' for the selected task, including fields for Project Number (SFC-169999.99), Project Name (Oak Hills Local SD), Organization Name (Akron CSD Segmer), Facility Name, Title (Oracle072018a), Assignee, Meeting Minute, Action (Action Requested: Oracle072018a), Response, and Review Response. The total number of tasks is indicated as 'Total: 3' at the bottom left of the table area.

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) 28

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

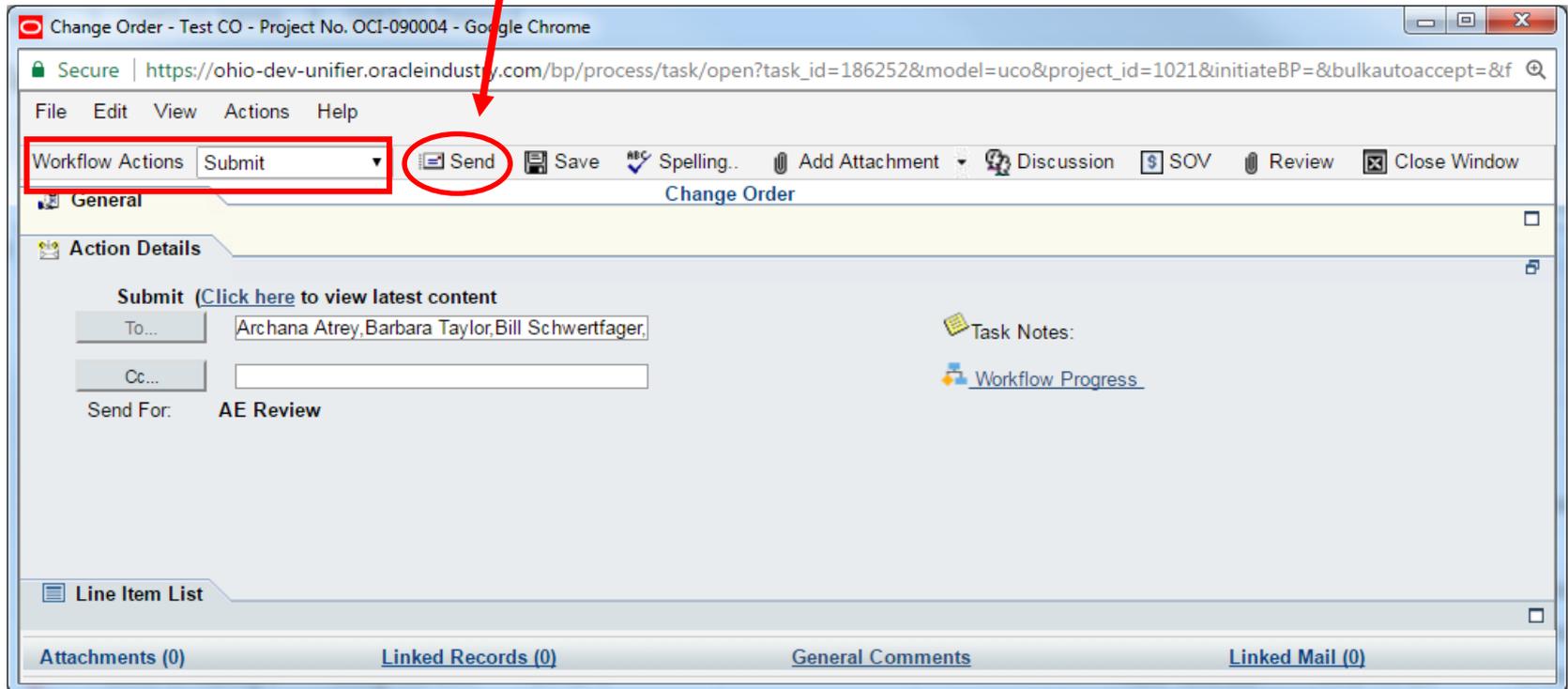
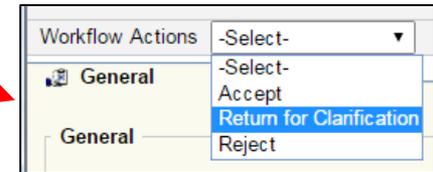
Action Details

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



Job Aids

- ▶ For additional reference materials visit our website 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. The website header includes the OFCC logo and a search bar. A navigation menu at the top contains links for About, Documents, Services / Programs, News / Events, Opportunities, OAKS CI (highlighted with a red circle and a red arrow), Resources, and Gallery. Below the navigation menu, a breadcrumb trail indicates 'You are here : OAKS CI'. 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 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, 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.

Navigation Menu: About, Documents, Services / Programs, News / Events, Opportunities, **OAKS CI**, Resources, Gallery

Breadcrumb: You are here : OAKS CI

Section: OAKS Capital Improvements (OAKS CI)
OAKS Capital Improvements (OAKS CI) is a construction management system for State of Ohio-sponsored capital improvement projects.

Agency/Higher Ed	K-12 Cloud System	K-12 Legacy System
Agency/Higher Ed User Login	K-12 User Login (Cloud System)	K-12 User Login (Old System)
Agency/Higher Ed Training	K-12 Training (Cloud System)	K-12 Training (Old System)

Contacts & Forms

OAKS CI Support
OAKSCI@ofcc.ohio.gov
614.644.2211

OAKS CI Forms

- User Application for Access
- Vendor Information Form
- Project Information Form

Additional Resources

- OAKS CI Fact Sheet
- Agency/Higher Ed FAQs
- K-12 Schools FAQs

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 dashboard on the left and a 'Preferences' dialog box on the right. The dashboard includes a pie chart with a value of 562 and a bar chart with values 421, 378, 322, and 192. The 'Preferences' dialog box has tabs for General, Email Subscription, Region Format, Proxy, and More. The 'Proxy' tab is selected, and the 'Users who can act as my Proxy' section is visible. A table with columns for Name, Email, and Proxy Status is shown, with a '+' button to the left of the table header.

Add a Proxy Cont.

- ▶ 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 Settings

Grant Proxy Access To *

Start Date/Time

End Date/Time

Status

Inactive Active

Cancel OK

User Picker

Search | Find on Page

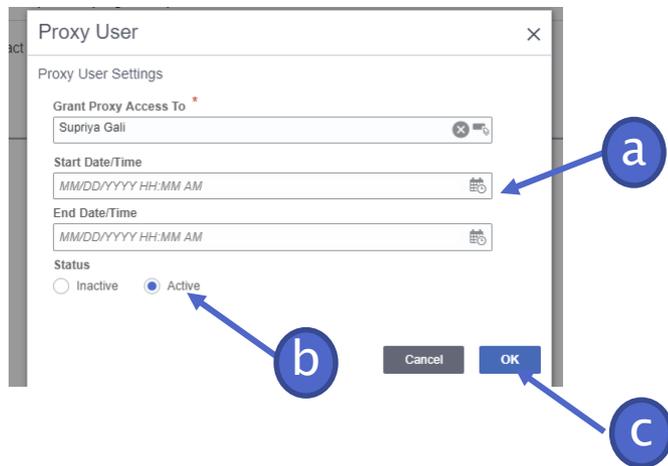
Name	First Name	Last Name	Company	E-Mail
OSU External CM	OSU	External CM	State of Ohio	yu.195@osu.edu
MUN Facility Contracting ...	MUN	Facility Contracting Offi...	State of Ohio	xxx@das.state.oh.us
Richard Feldmiller	Richard	Feldmiller	State of Ohio	rfeldmiller@ysu.edu
MUN Finance & Business...	MUN	Finance & Business Se...	State of Ohio	xxx@das.state.oh.us
CLS Fiscal	CLS	Fiscal	State of Ohio	xxx@das.state.oh.us
OSU Fiscal Officer	OSU	Fiscal Officer	State of Ohio	sosa.7@osu.edu
Cyndi Fout	Cyndi	Fout	State of Ohio	fout.9@osu.edu
Anne Frost	Anne	Frost	State of Ohio	anne.frost@ofcc.ohio.gov
WSU Fund Manager	WSU	Fund Manager	State of Ohio	xxx@das.state.oh.us
OSU Funding Manager	OSU	Funding Manager	State of Ohio	sosa.7@osu.edu
Supriya Gali	Supriya	Gali	State of Ohio	supriya.gali@ofcc.ohio...
Shiva Gannerlia	Shiva	Gannerlia	State of Ohio	shiva.gannerlia@ofcc.o...
SAO General Contractor	SAO	General Contractor	State of Ohio	xxx@das.state.oh.us
UC General Council	UC	General Council	State of Ohio	xxx@uc.edu
Brett Gundlach	Brett	Gundlach	State of Ohio	brett.gundlach@ofcc.oh...
Rhonda Haqemeyer	Rhonda	Haqemeyer	State of Ohio	rhonda.haqemeyer@of...

Total: 310

Cancel Select

Add a Proxy Cont.

- ▶ 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 table is visible with columns for 'Design Reviews', 'Meeting Minutes', 'Professional Services Agreements', 'Professional Services Amendments', and 'Professional Services Pay Request'. The table contains numerical data for each row.

	0	0	2
Design Reviews	25	0	0
Meeting Minutes	0	0	1
Professional Services Agreements	0	6	3
Professional Services Amendments	0	4	0
Professional Services Pay Request	0	15	1

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211