



Local Admin Training

Design Phase

OAKS CI Training and Support

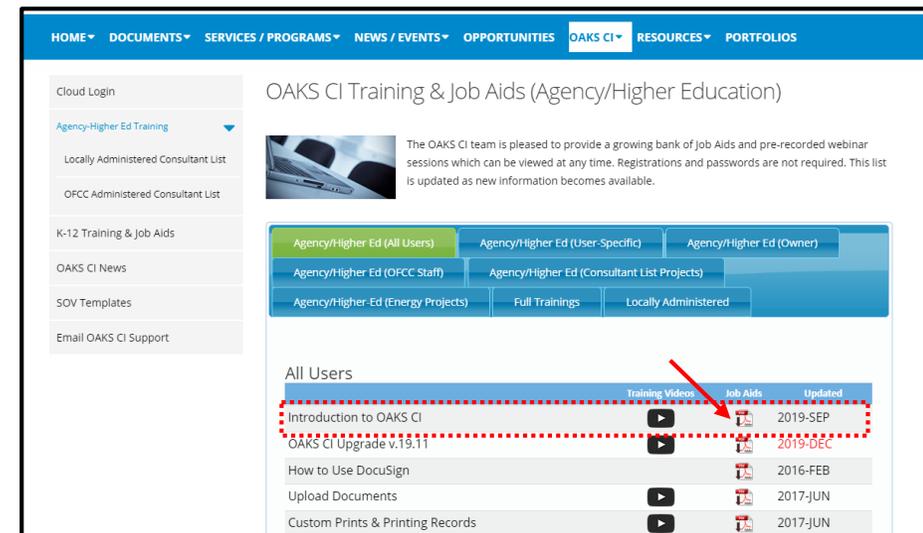
To view additional job aids and training materials for OAKS CI:

1. Navigate to ofcc.ohio.gov
2. Mouse over the OAKS CI tab
3. Click Agency/Higher Ed Training



Before proceeding through this training document, it is recommended you view the [Introduction to OAKS CI](#) job aid.

For additional help, please contact the OAKS CI Support Desk - oaksci@ofcc.ohio.gov



Navigation

At the bottom-right of each slide is a text link that lists the section and subsection of your location in the document. The example to the right is taken from the Create step of the Professional Services Agreement. Clicking the link will take you to the beginning of the Professional Services Agreement section.



The Home icon will always take you directly back to the table of contents.

Some slides describe a workflow with boxes representing each step. On these slides you can click the boxes to navigate directly to that step in the job aid.



You will also see text links that will either take you to another slide, or directly to another document. The [Topics](#) slide contains links to each major section.

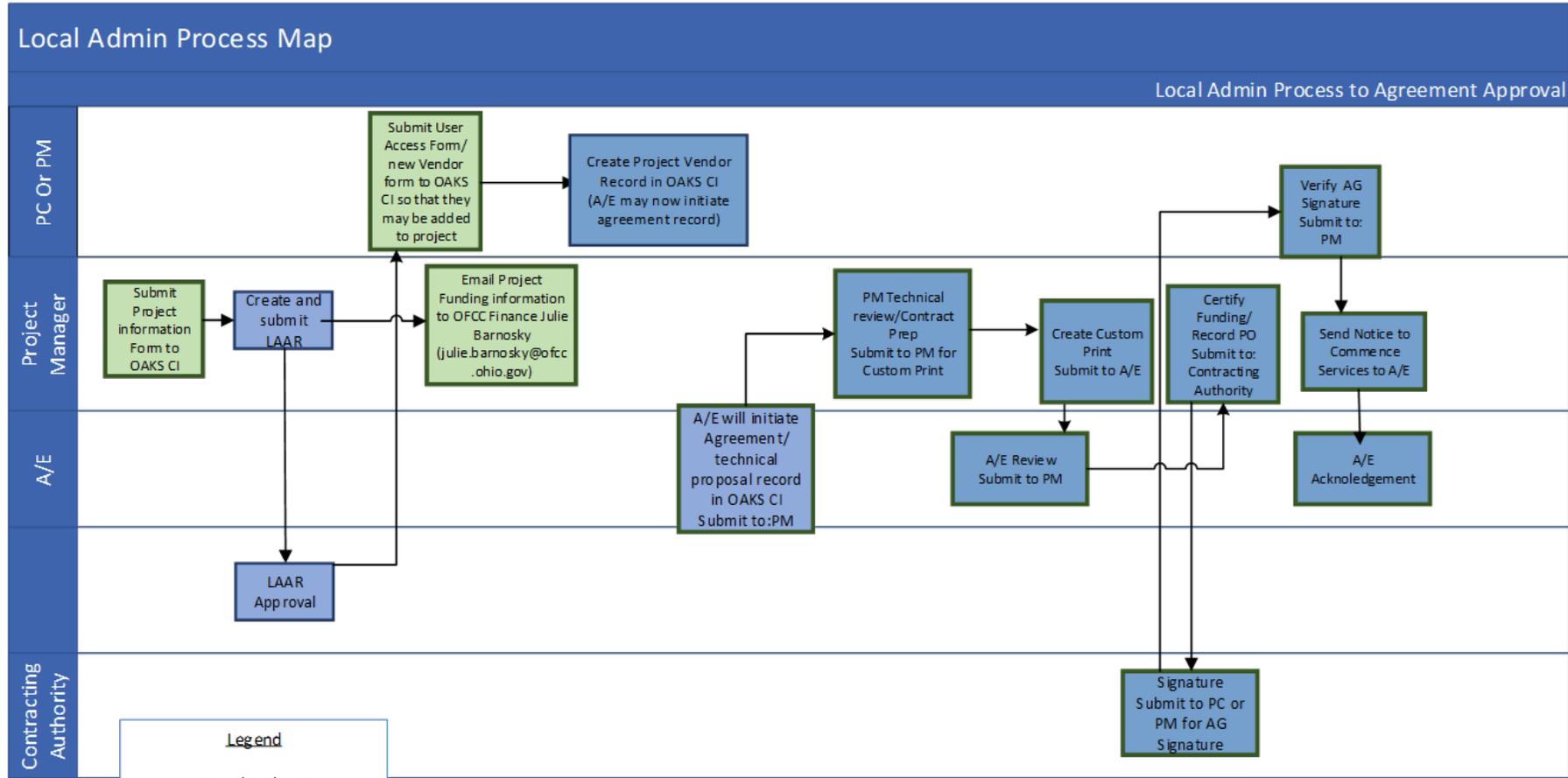
Topics

Slide

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Local Admin Process to Agreement

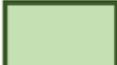


Legend

Processes Completed in OAKS CI:



Processes Completed Outside of OAKS CI:

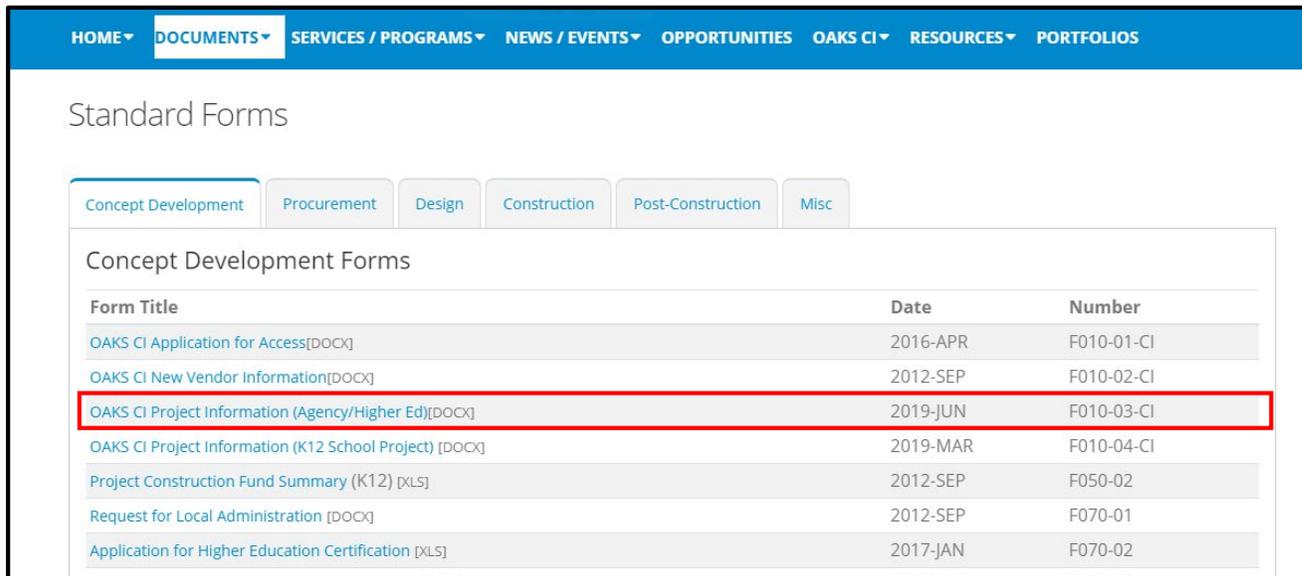


Click the boxes to navigate directly to each section

Project Creation

Project Request

- ▶ Prior to completing any work in OAKS CI, the OAKS CI Project (Initiation) Information form must be completed and submitted to oaksci@ofcc.ohio.gov
- ▶ The form can be located at ofcc.ohio.gov under:
 - ▶ Documents tab → Standard Forms
 - ▶ Concept Development → [OAKS CI Project Information \(Agency/Higher Ed\)](#)



Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Concept Development Forms

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

Create a Local Admin Request



Create a Local Admin Request

Purpose

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

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



Create a Local Admin Request

Roles

Owner or Project Manager

Initiates the request for local administration approval authority

Institutional Designee

Reviews and validates that the request is appropriately submitted

OFCC Fiscal Officer

Reviews the financial information and recommends approval or rejection

OFCC Project Manager Supervisor

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

Team Support

Prepares and distributes the approval or rejection letter

State Architect

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



Create a Local Admin Request

Creation of Record:

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

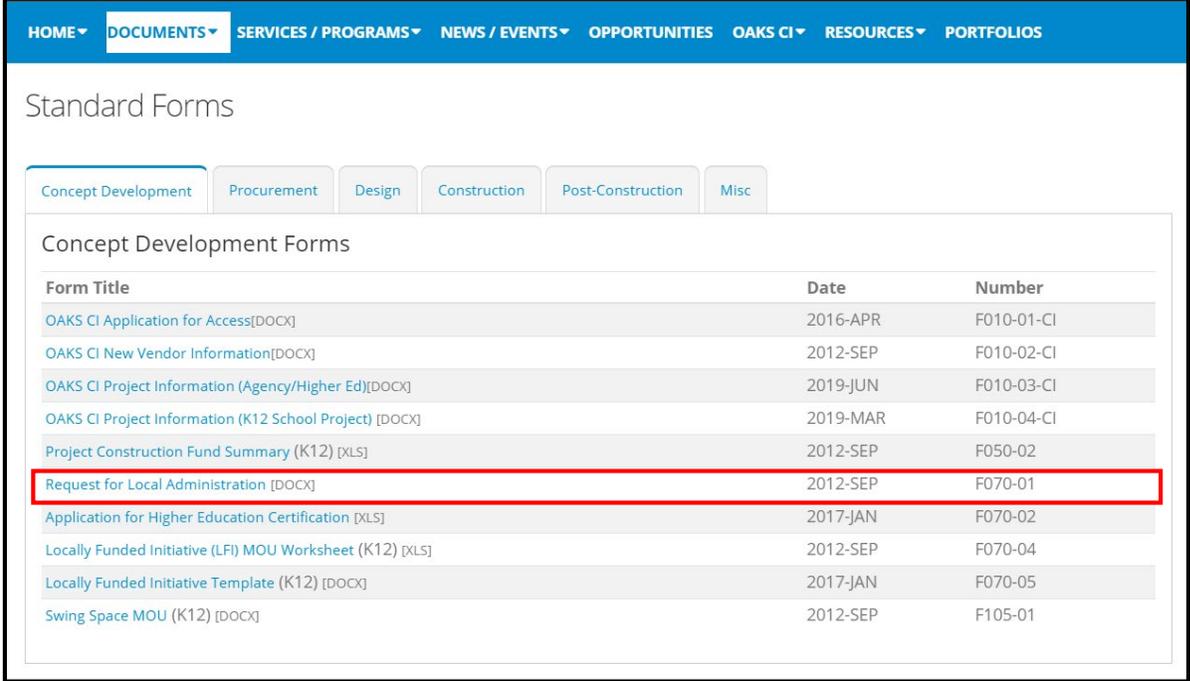


Create a Local Admin Request

Creation of Record:

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

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



Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Concept Development Forms

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

Create a Local Admin Request

Creation of Record:

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

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

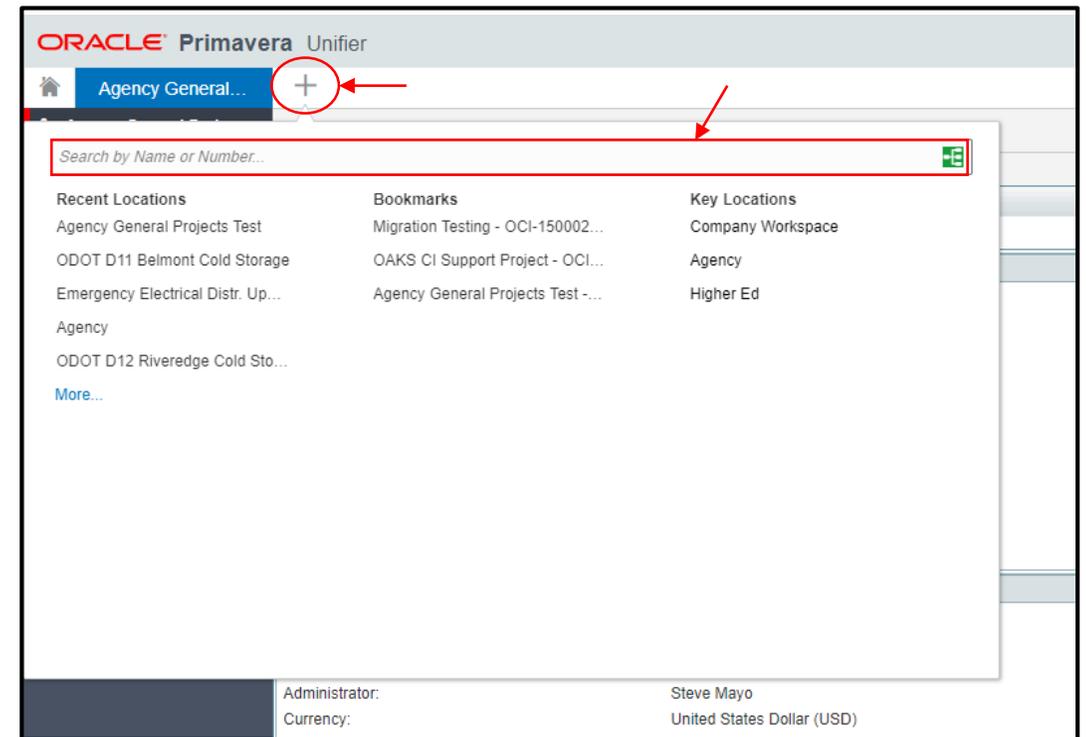


Create a Local Admin Request

Creation of Record:

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

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

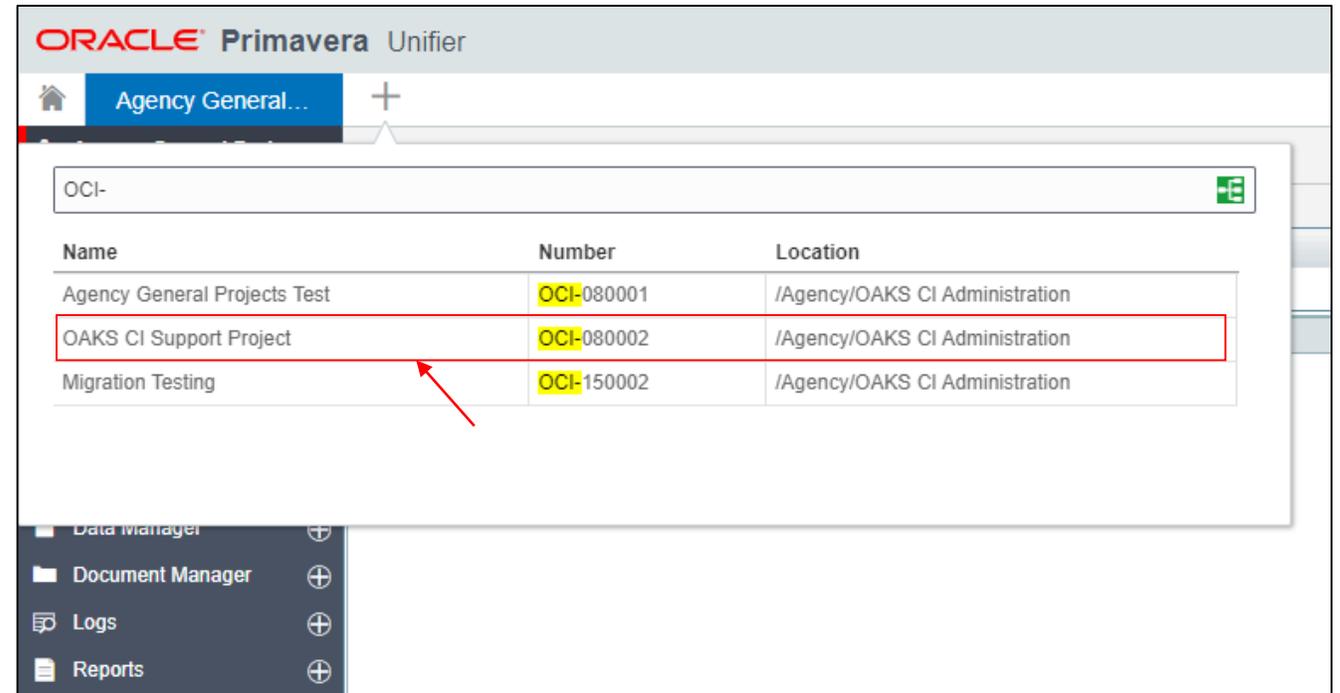


Create a Local Admin Request

Creation of Record:

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

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



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

| Name | Number | Location |
|------------------------------|------------|--------------------------------|
| Agency General Projects Test | OCI-080001 | /Agency/OAKS CI Administration |
| OAKS CI Support Project | OCI-080002 | /Agency/OAKS CI Administration |
| Migration Testing | OCI-150002 | /Agency/OAKS CI Administration |

A red box highlights the 'OAKS CI Support Project' row, and a red arrow points to it from the right. Below the search results, there is a sidebar with a dark background containing the following items: 'Data Manager', 'Document Manager', 'Logs', and 'Reports', each with a plus sign icon to its right.

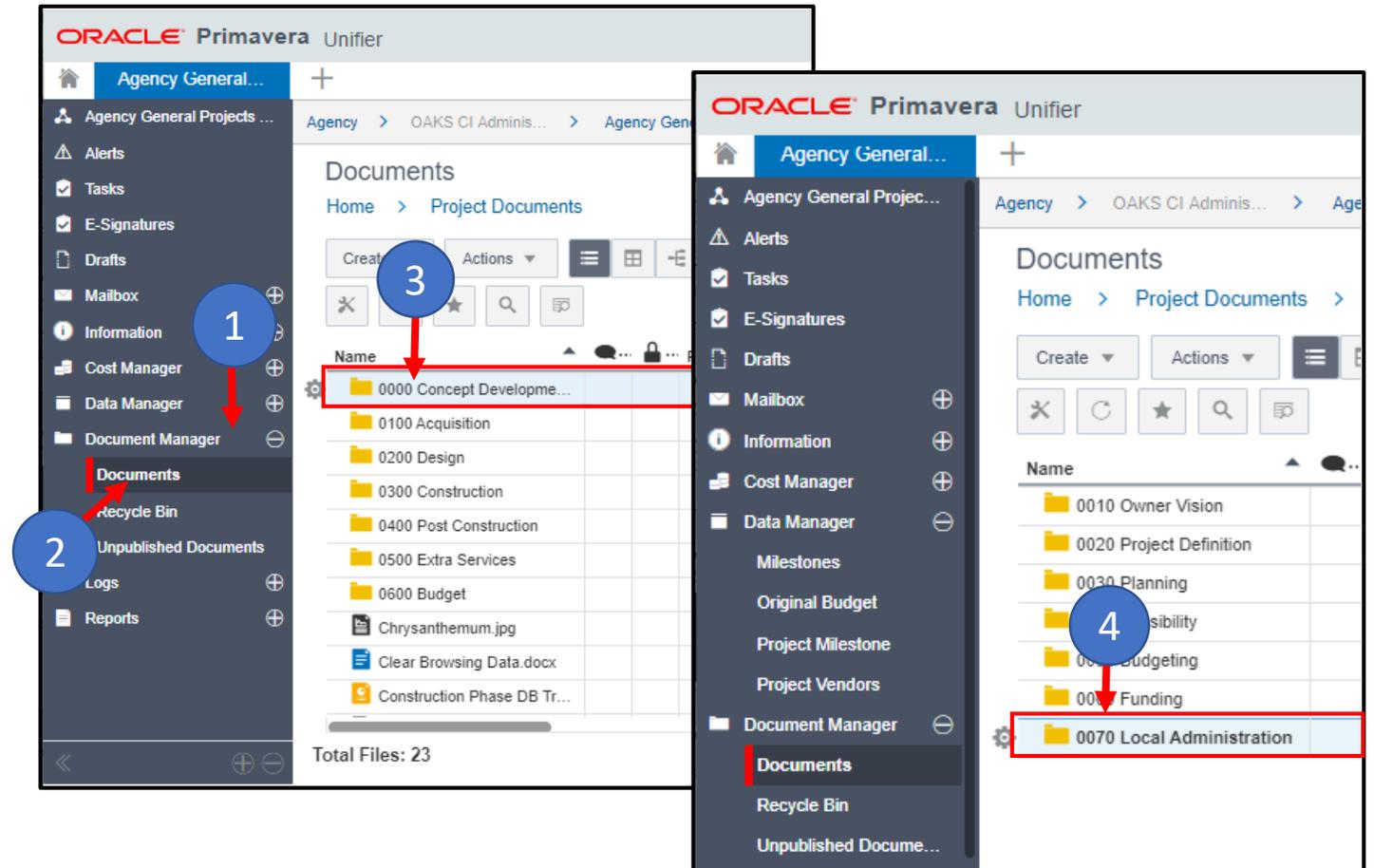


Create a Local Admin Request

Creation of Record:

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

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



Create a Local Admin Request

Creation of Record:

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

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

The screenshot displays the Oracle Primavera Unifier interface. The main window shows the 'Documents' section with a list of files. A red circle labeled '5' highlights the 'Upload Arrow' button in the top right corner of the document list. Below this, a dialog box titled 'Upload Files - Google Chrome' is open. A red circle labeled '6' highlights the 'Browse...' button in the dialog box. The dialog box contains a table with columns for File Name, File Size, Document Title, Rev. No., and Issue Date. The first row shows a file named '0070 Local Administration'. At the bottom of the dialog box, there are 'Advanced Options' including 'File Upload Options' and 'Folder Upload Options'.

| File Name | File Size | Document Title | Rev. No. | Issue Date |
|---------------------------|-----------|----------------|----------|------------|
| 0070 Local Administration | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Advanced Options

File Upload Options

Include reference files

Upload from My Computer

Revise automatically if file with same name exists

Folder Upload Options

Upload files only

Upload folders and files

Cancel Upload

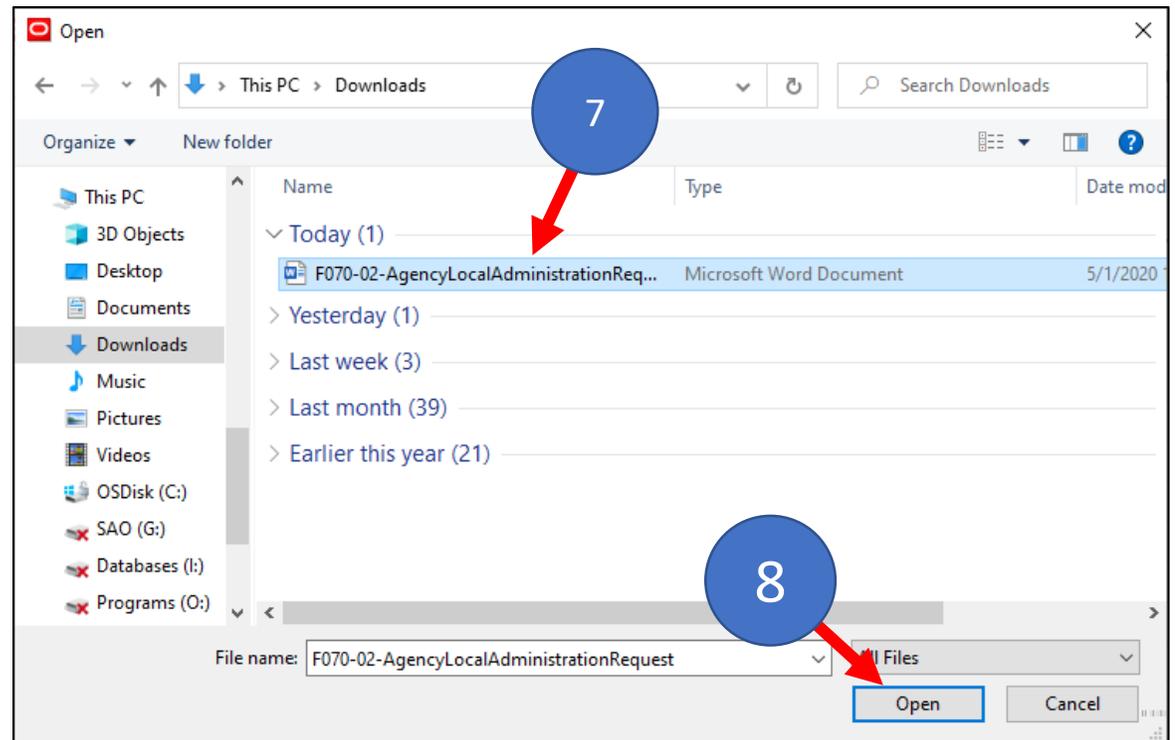
Create a Local Admin Request

Creation of Record:

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

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

8) Click **Open**

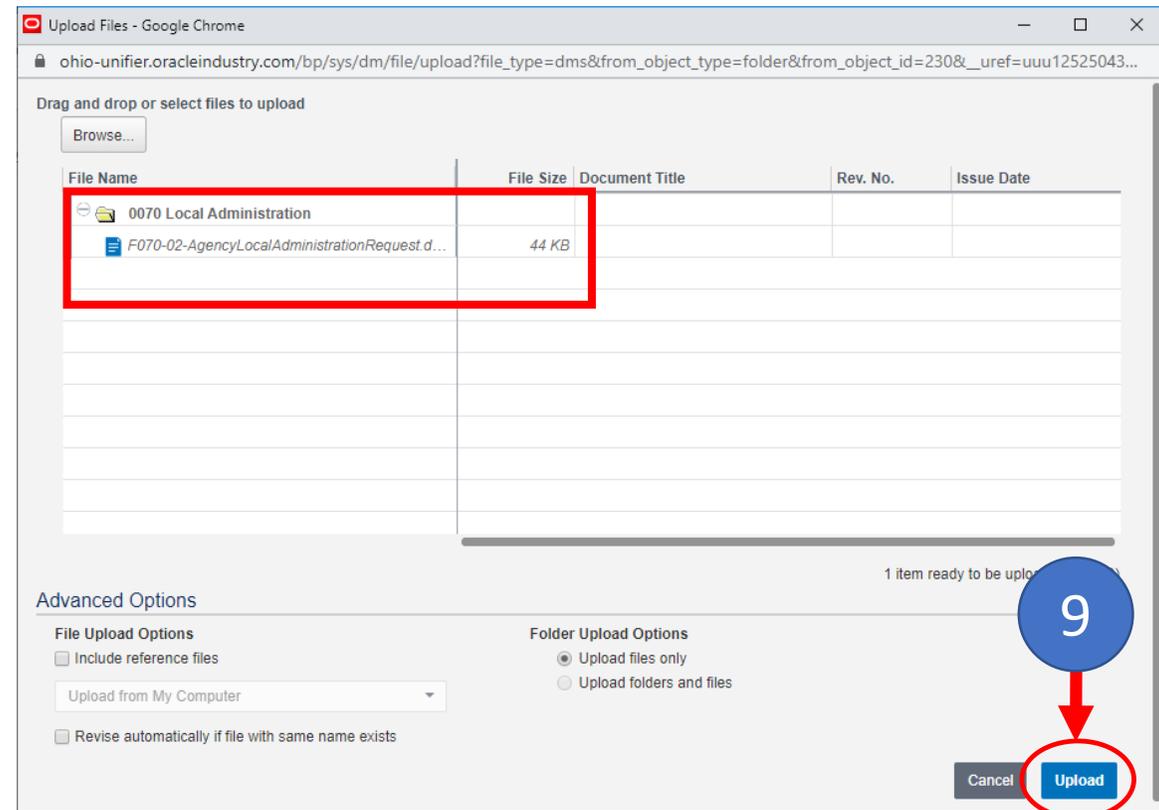


Create a Local Admin Request

Creation of Record:

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

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

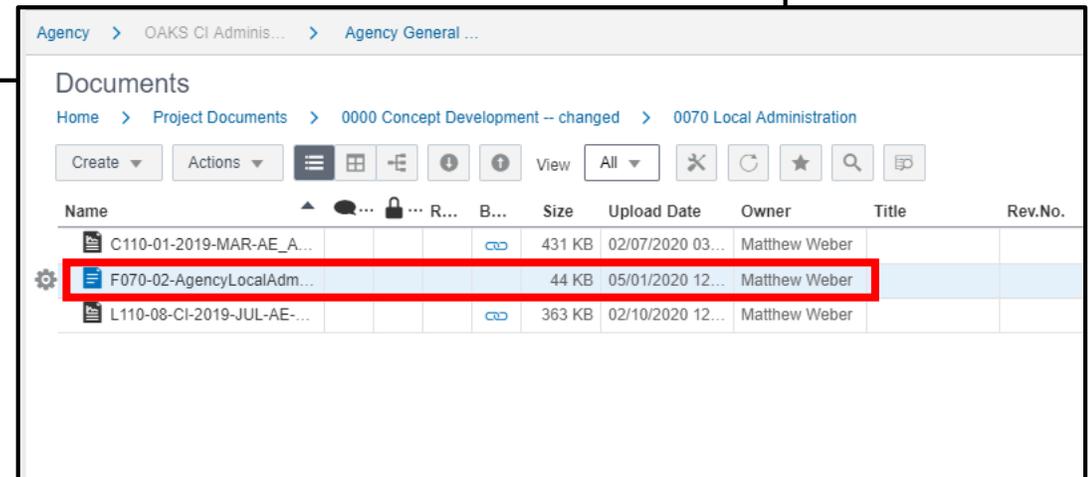
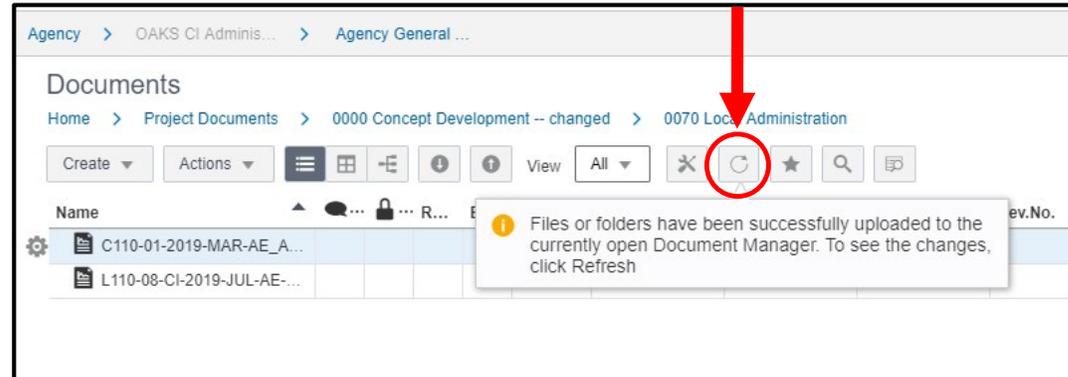


Create a Local Admin Request

Creation of Record:

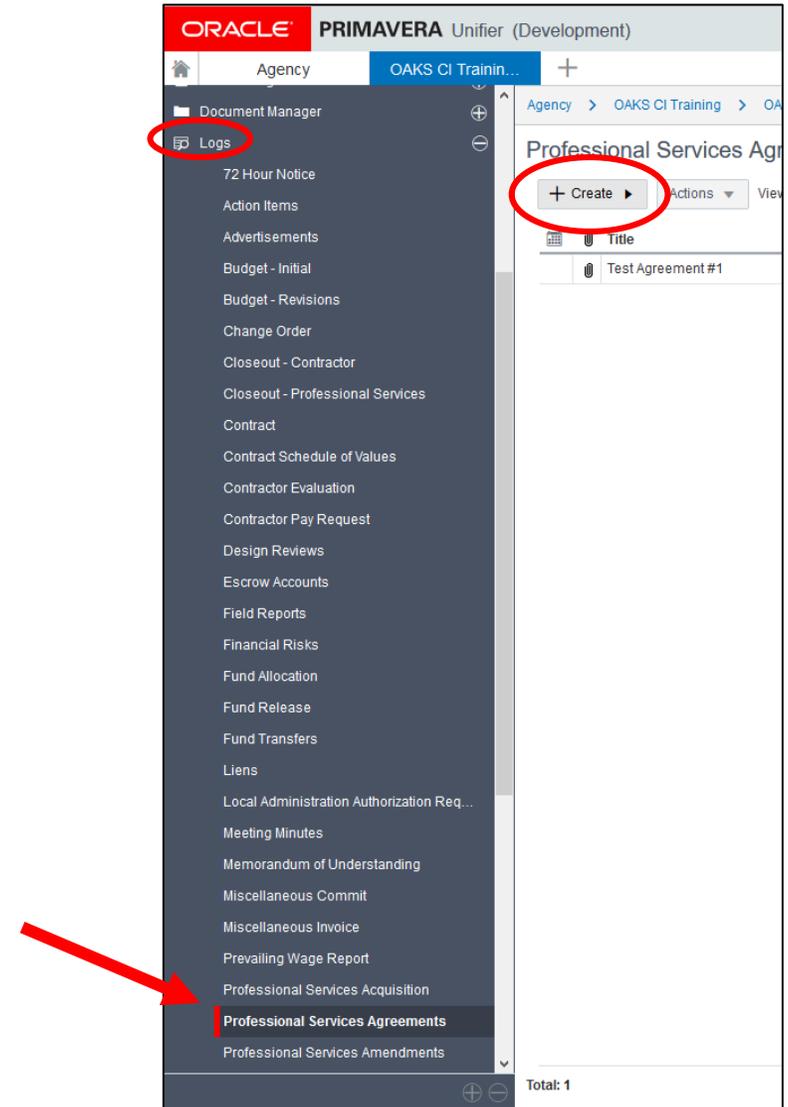
C. Upload Form F070-01 and all attachments to the Document Manager:

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



Create a Local Admin Request

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



Create a Local Admin Request

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

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/ulaar/1003/248804?__uref=uuu125250432t1

Create New Local Administration Authorization Requests

Send Save

General

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

| | |
|------------------------------|---------------|
| Organization | Record Number |
| OAKS CI Test | |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | |
| Project Location | Status |
| OAKS CI Administration | |

Facility Information

| | |
|---------------|----------------|
| Gross Sq. Ft. | No. of Stories |
| 0 | 5 |
| Project Type | |
| Renovation | |

Attachments

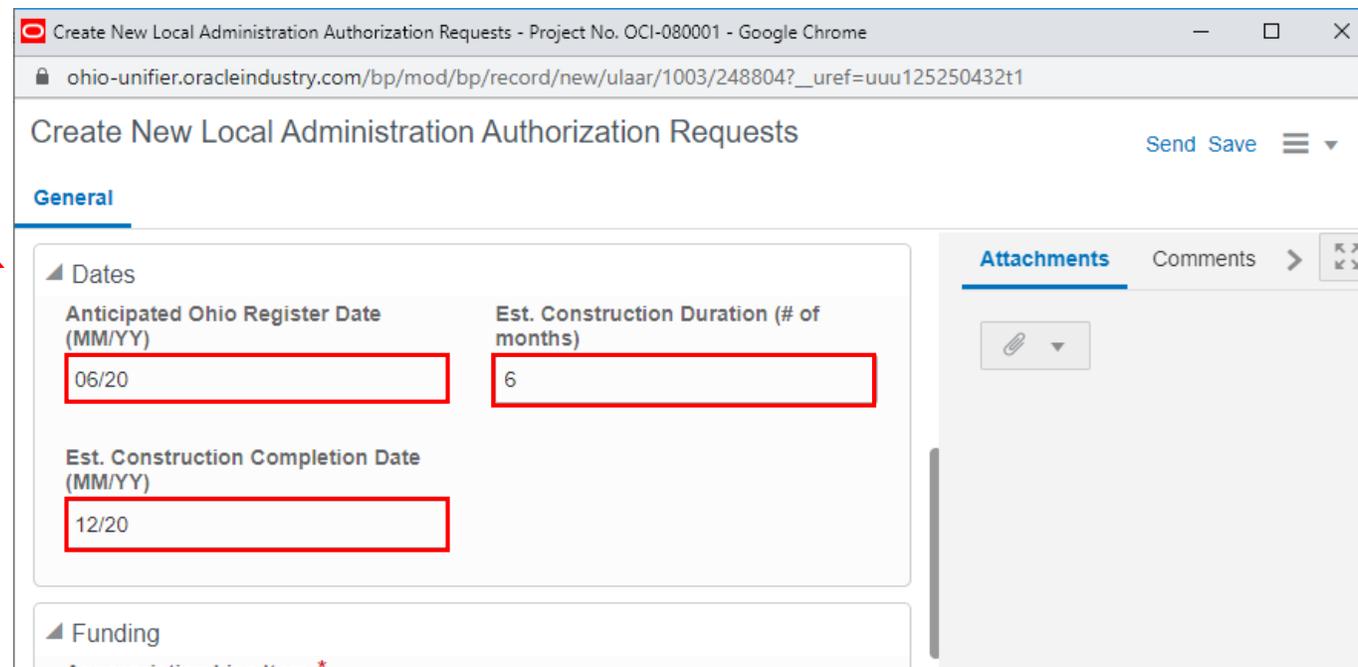
Comments

Information
No Attachments.

Create a Local Admin Request

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

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



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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/ulaar/1003/248804?_uref=uuu125250432t1

Create New Local Administration Authorization Requests

Send Save

General

Dates

| | |
|---|--|
| Anticipated Ohio Register Date (MM/YY) | Est. Construction Duration (# of months) |
| <input type="text" value="06/20"/> | <input type="text" value="6"/> |
| Est. Construction Completion Date (MM/YY) | |
| <input type="text" value="12/20"/> | |

Funding

Attachments Comments

Create a Local Admin Request

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

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

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

Create New Local Administration Authorization Requests

Send Save

General

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

Funding

Appropriation Line Item *
H. B. No. 48

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

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

Other Description

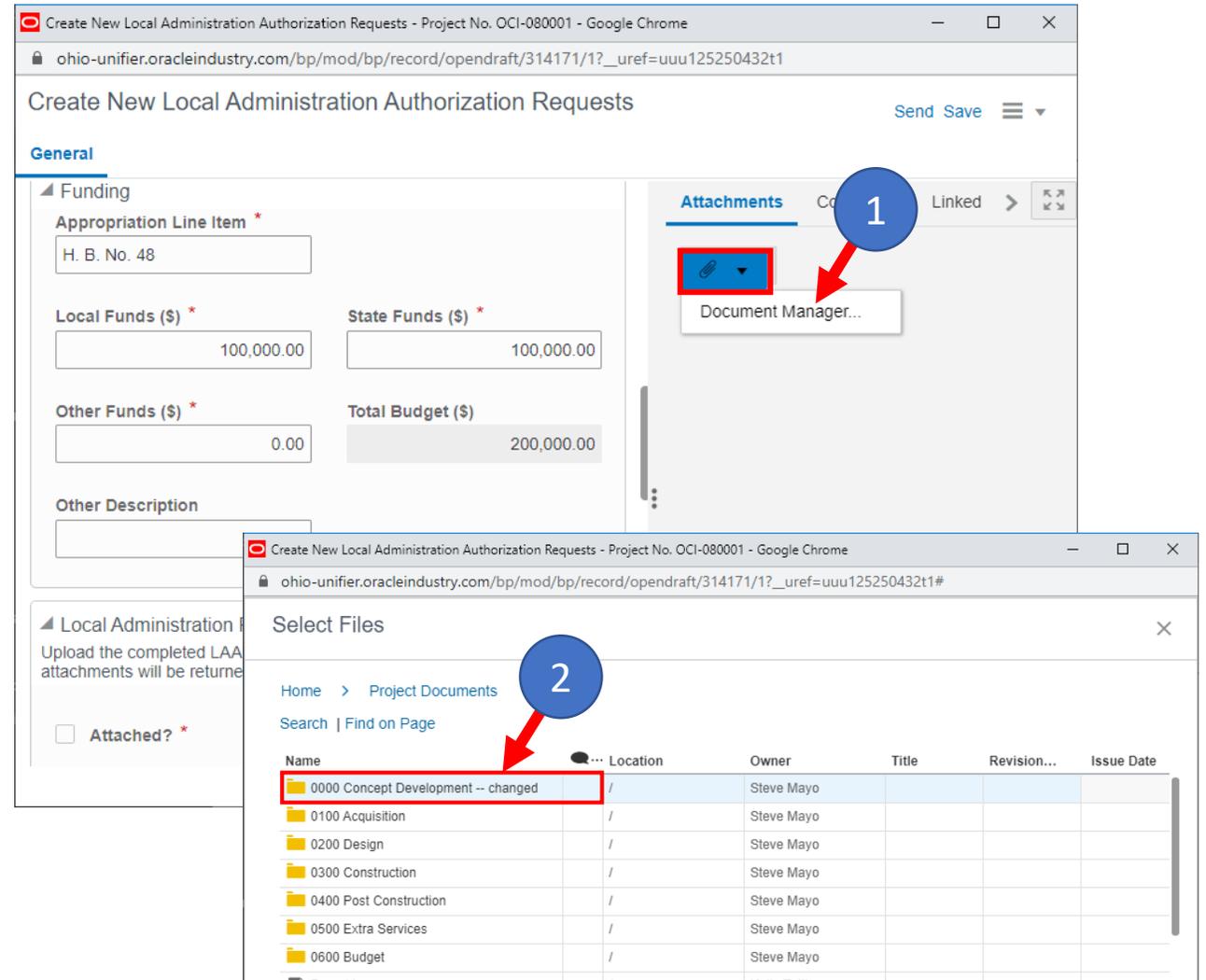
Attachments Comments Linked

Information
No Attachments.

Create a Local Admin Request

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

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



Create a Local Admin Request

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

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

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

The first screenshot shows a "Select Files" dialog box. The breadcrumb path is "Home > Project Documents > 0000 Concept Development -- changed". A table lists folders, with "0070 Local Administration" highlighted. A red arrow labeled "3" points to this folder.

| Name |
|----------------------------------|
| 0010 Owner Vision |
| 0020 Project Definition |
| 0030 Planning |
| 0040 Feasibility |
| 0050 Budgeting |
| 0060 Funding |
| 0070 Local Administration |

The second screenshot shows the same "Select Files" dialog box, but the breadcrumb path is "Home > Project Documents > 0000 Concept Development -- changed > 0070 Local Administration". A table lists files, with "F070-02-AgencyLocalAdministration..." highlighted. A red arrow labeled "4" points to this file.

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

At the bottom right of the second screenshot, a red arrow labeled "5" points to the "Select" button.

Create a Local Admin Request

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

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

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

Create New Local Administration Authorization Requests

Send Save

General

Funding

Appropriation Line Item *
H. B. No. 48

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

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

Other Description

Local Administration Request Form

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

Attached? *

Attachments

Comments Linked >

Published Attachments

| Name |
|--------------------------|
| F070-02-AgencyLocalAd... |

Total: 1

Create a Local Admin Request

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

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

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

Create New Local Administration Authorization Requests Send Save

General

Institutional Designee

Institutional Designee
ODJFS

Address Line 1
4200 Surface Rd

Address Line 2

City
Columbus

State
Ohio

ZIP
43228

Owners Representative
Omar Rodriguez

Owner's Financial
Owen Fitzgerald

Attachments Comments Linked

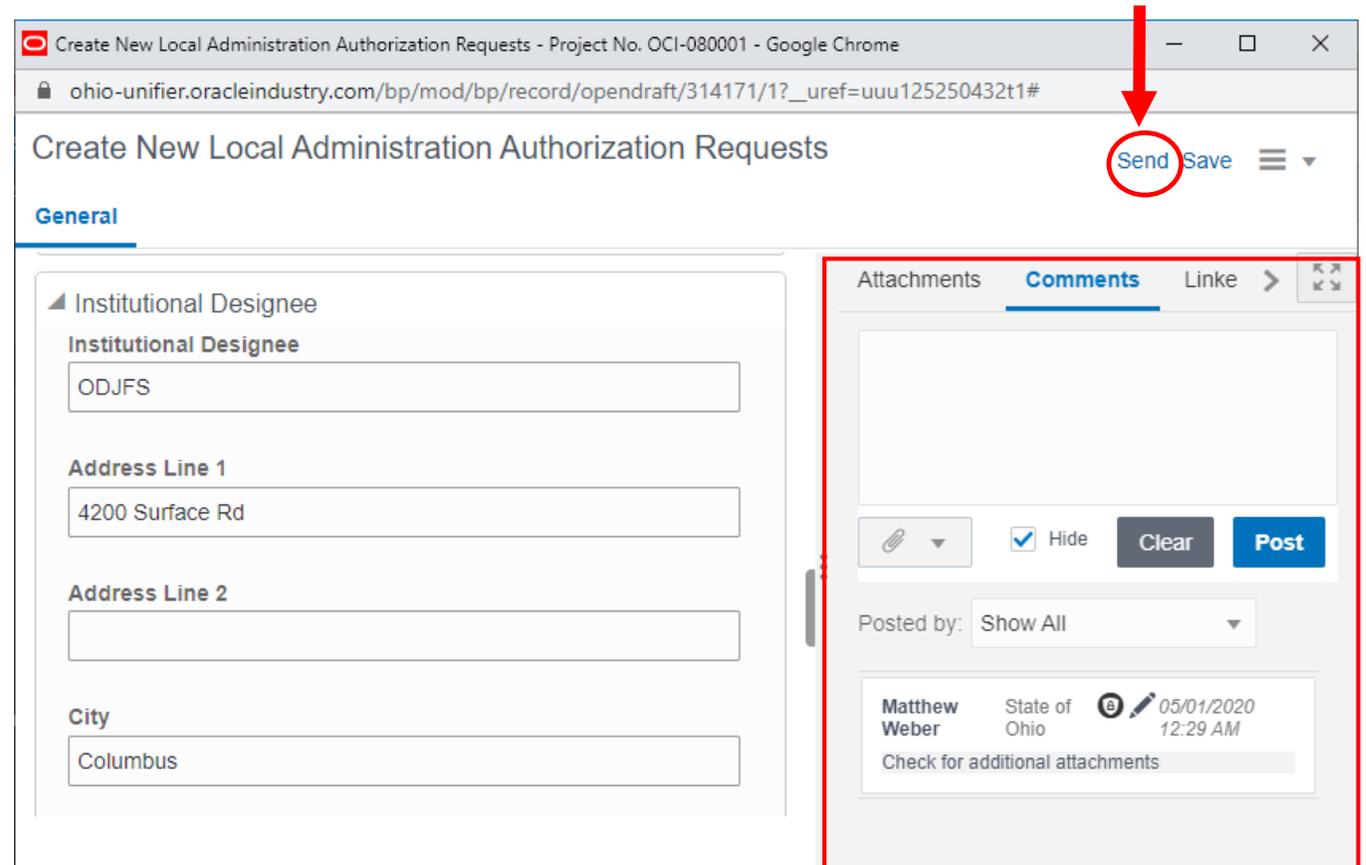
Published Attachments

| Name |
|-------------------------|
| F070-02-AgencyLocalA... |

Total: 1

Create a Local Admin Request

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



The screenshot shows a web browser window with the title "Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/314171/1?__uref=uuu125250432t1#". The page title is "Create New Local Administration Authorization Requests". In the top right corner, there are buttons for "Send", "Save", and a menu icon. The "Send" button is circled in red, and a red arrow points to it. Below the title, there is a "General" tab. The form contains several fields: "Institutional Designee" (with value "ODJFS"), "Address Line 1" (with value "4200 Surface Rd"), "Address Line 2" (empty), and "City" (with value "Columbus"). On the right side, there is a "Comments" tab, which is highlighted in red. Below the "Comments" tab, there is a text area for comments, a "Hide" checkbox (checked), a "Clear" button, and a "Post" button. Below the text area, there is a "Posted by:" dropdown menu (set to "Show All") and a comment by "Matthew Weber" from the "State of Ohio" dated "05/01/2020 12:29 AM". At the bottom of the comment section, there is a "Check for additional attachments" button.

Create a Local Admin Request

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

The screenshot shows a web browser window titled "Create New Local Administration Authorization Requests - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/314171/1?__uref=uuu125250432t1#". The main form is titled "Create New" and has a "General" tab selected. The form contains fields for "Organization" (OAKS CI Tes), "Project Number" (OCI-080001), "Project Name" (Agency Gene), and "Project Location" (OAKS CI Adr). A "Facility Information" section is partially visible with "Gross Sq. Ft.".

The "Workflow Action Details" modal is open, showing the following details:

- Action Details**
 - Workflow Actions ***: A dropdown menu with "Submit" selected and highlighted by a red box.
 - Send For**: A button labeled "Review and Validation".
 - To**: A text field containing "Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Institutional Designee".
 - CC**: A text field with the placeholder "Start typing for suggestions..." and a search icon.
- Due Date Details**
 - Task Due Date**: A text field that is empty.
 - An information icon (i) is displayed above the text "Task Due Date is not available".

At the bottom of the modal, there are two buttons: "Cancel" and "Send". A red arrow points to the "Send" button.



Funds

Submit project fund information to Julie.Barnosky@ofcc.ohio.gov

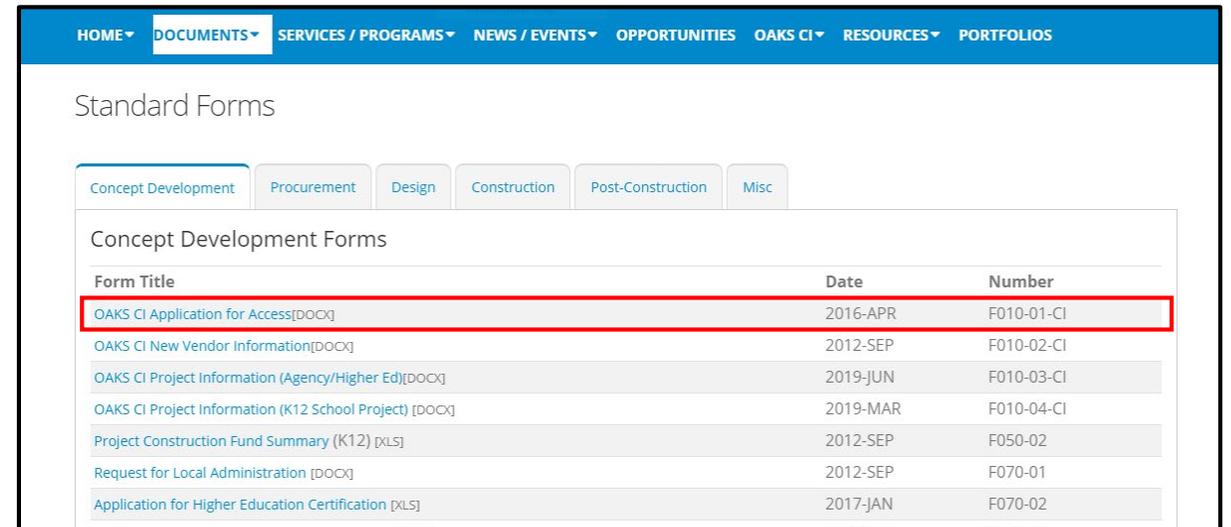
New User Access



Project Request

- ▶ Once the project has been created in OAKS CI, please submit user access forms for any vendors who will be utilizing the system. The form must be completed and submitted to oaksci@ofcc.ohio.gov after approval by the Project Coordinator or Project Manager.

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



Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Concept Development Forms

| Form Title | Date | Number |
|---|----------|------------|
| OAKS CI Application for Access[DOCX] | 2016-APR | F010-01-CI |
| OAKS CI New Vendor Information[DOCX] | 2012-SEP | F010-02-CI |
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| OAKS CI Project Information (K12 School Project) [DOCX] | 2019-MAR | F010-04-CI |
| Project Construction Fund Summary (K12) [XLS] | 2012-SEP | F050-02 |
| Request for Local Administration [DOCX] | 2012-SEP | F070-01 |
| Application for Higher Education Certification [XLS] | 2017-JAN | F070-02 |

Create Vendor Record

(Project Coordinator)



Create Vendor Record (PC)

- ▶ After the project has been created and users have been added, you are now ready to create the Vendor record in the project. This must be done prior to the creation of the Professional Services Agreement.



Create Vendor Record (PC)

▶ Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

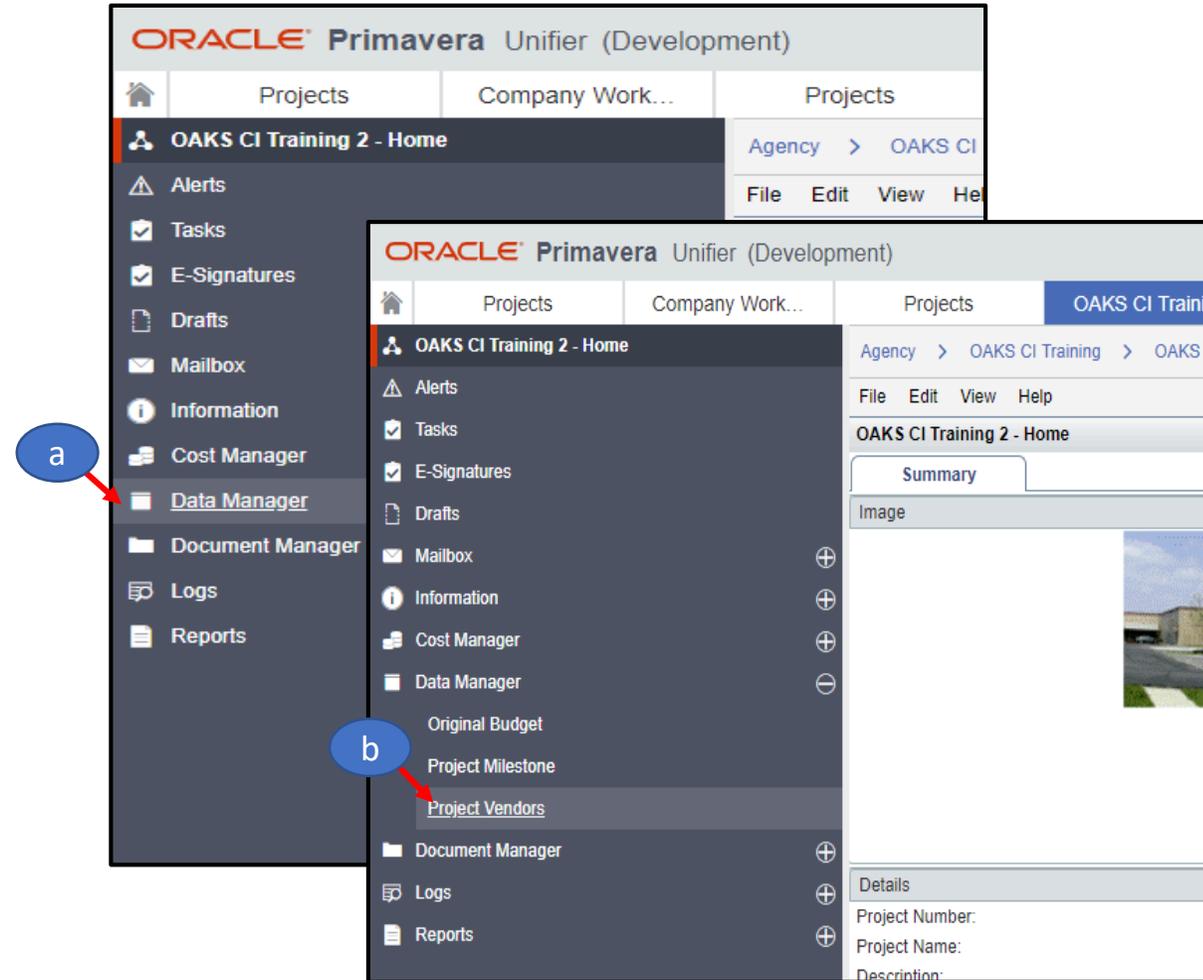
c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and a search bar containing "DPS-". A dropdown menu is open, displaying a table of project records. A red arrow points to the search bar, and another red arrow points to the first row of the table. A red box highlights a "+" sign in the top right corner of the application interface.

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

Create Vendor Record (PC)

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



Create Vendor Record (PC)

c. Click **Create** to open a new record

Complete all fields

d. Click Address tab to update Vendor address

e. Click **Submit**

The screenshot displays the Oracle Project Vendors interface. The top part shows a table of existing vendors with columns for OAKS Business Unit, Vendor Name, OAKS Vendor ID, Local Vendor ID, City, and Status. A red arrow labeled 'c' points to the '+ Create' button. Below the table, a browser window shows the 'Create New Project Vendors' form. A red arrow labeled 'd' points to the 'Address' tab, and another red arrow labeled 'e' points to the 'Submit' button. The form contains various input fields for organization, business unit, project, and vendor details.

| OAKS Business Unit | Vendor Name | OAKS Vendor... | Local Vendor... | City | Status |
|--------------------|----------------------------------|----------------|-----------------|------------|--------|
| KSU01 | Archie's Architectural Inc. | 000001725 | 000012345 | Dublin | Active |
| DAS01 | ENC | nnnnnnn | | Shaunatown | Active |
| DOT01 | OAKS Plumbing | | | Columbus | Active |
| NCC01 | R. W. Setterlin Building Company | 0000043524 | | Columbus | Active |

Organization: Miami University
OAKS Business Unit: MUN01
Project Number: OCI-080001
Project Name: OAKS CI Training 1
Project Location: Surface Road
Vendor: OAKS Plumbing
Status: Active
Vendor Name: OAKS Plumbing
President / CEO: John Tree

Professional Services Agreement

(Create, Review, and Approve Agreement)



Professional Services Agreement – Purpose

- ▶ This Business Process (BP) utilizes the information presented in the Technical Proposal to develop the contract language and fee requirements for the Professional Services Agreement.
- ▶ Upon completion of this BP, the Professional Services Provider receives:
 - ▶ A Contract
 - ▶ Authorization to proceed with the work
- ▶ The Professional Services Agreement BP also establishes the Schedule of Values (SOV) for Professional Services (Consultant) Pay Requests.



Professional Services Agreement

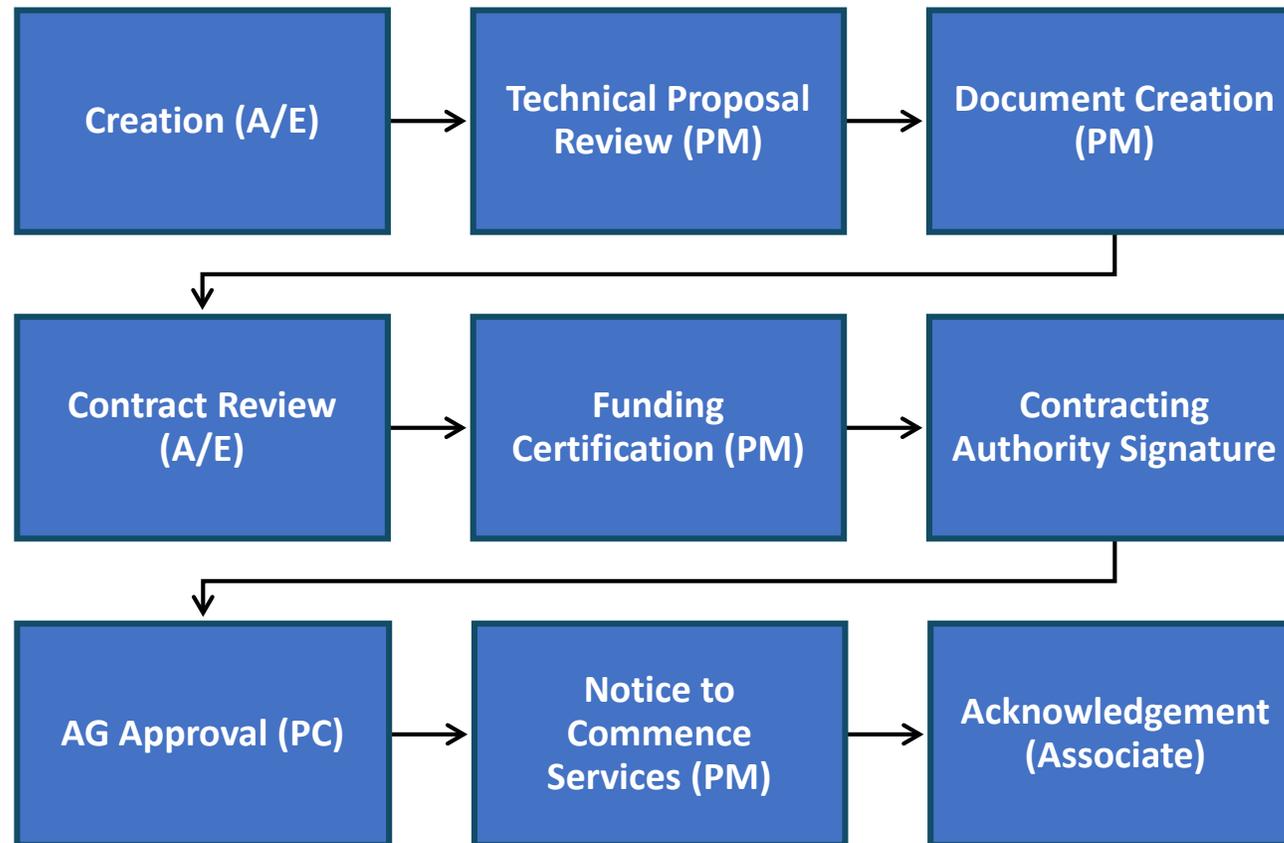
Prior to creating a Professional Services Agreement record in OAKS CI:

- ▶ The Project Coordinator must ensure that the Professional Service Provider has been added to the project. If you have questions, contact the OAKS CI Support team.
- ▶ Ensure that the [Vendor Record](#) for the Professional Service Provider has been created in the project



Professional Services Agreement

▸ Workflow Steps



Click the boxes to navigate directly to each section



Professional Services Agreement - Create (A/E)



Professional Services Agreement – Create (A/E)

Associate will:

- ▶ Initiate the Professional Services Agreement
- ▶ Attach: Technical/fee proposal, all other supporting documentation



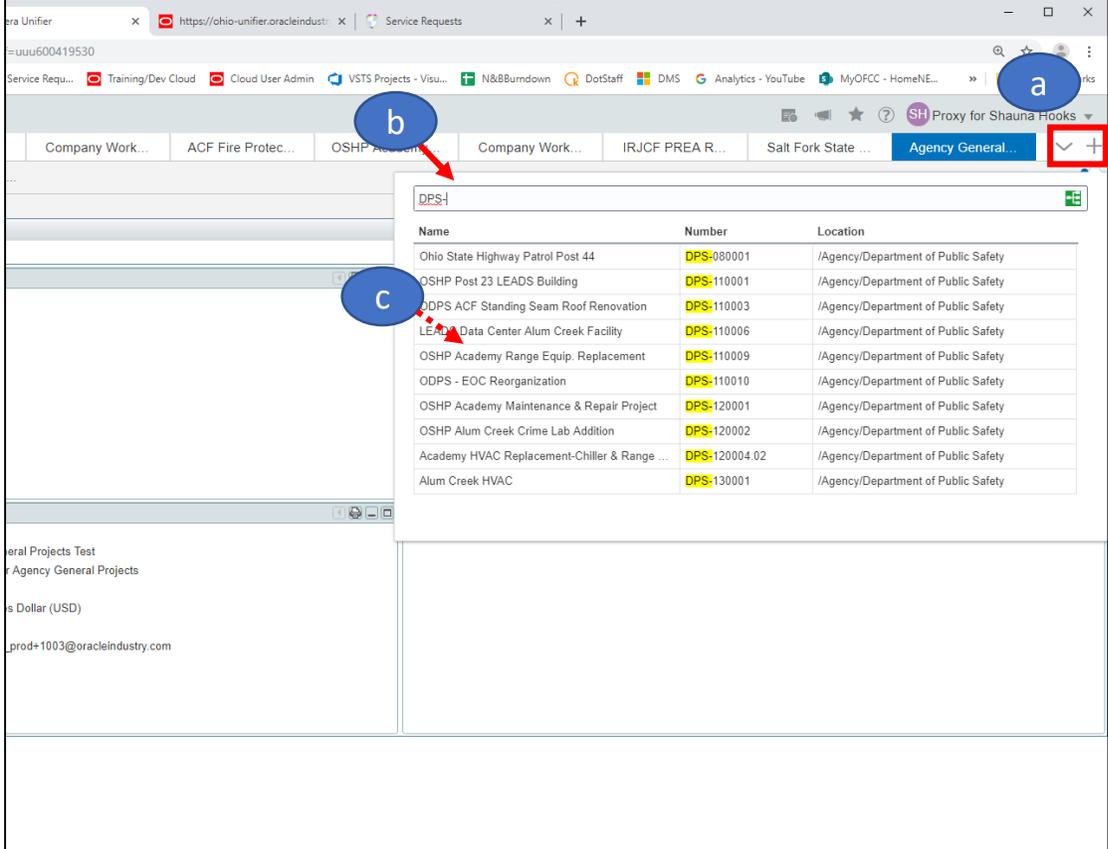
Professional Services Agreement Create (A/E)

► Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open



The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar contains the text "uuuu600419530". The page displays a search bar with the text "DPS-" and a dropdown menu showing a list of projects. The projects are listed in a table with columns for Name, Number, and Location. The projects are:

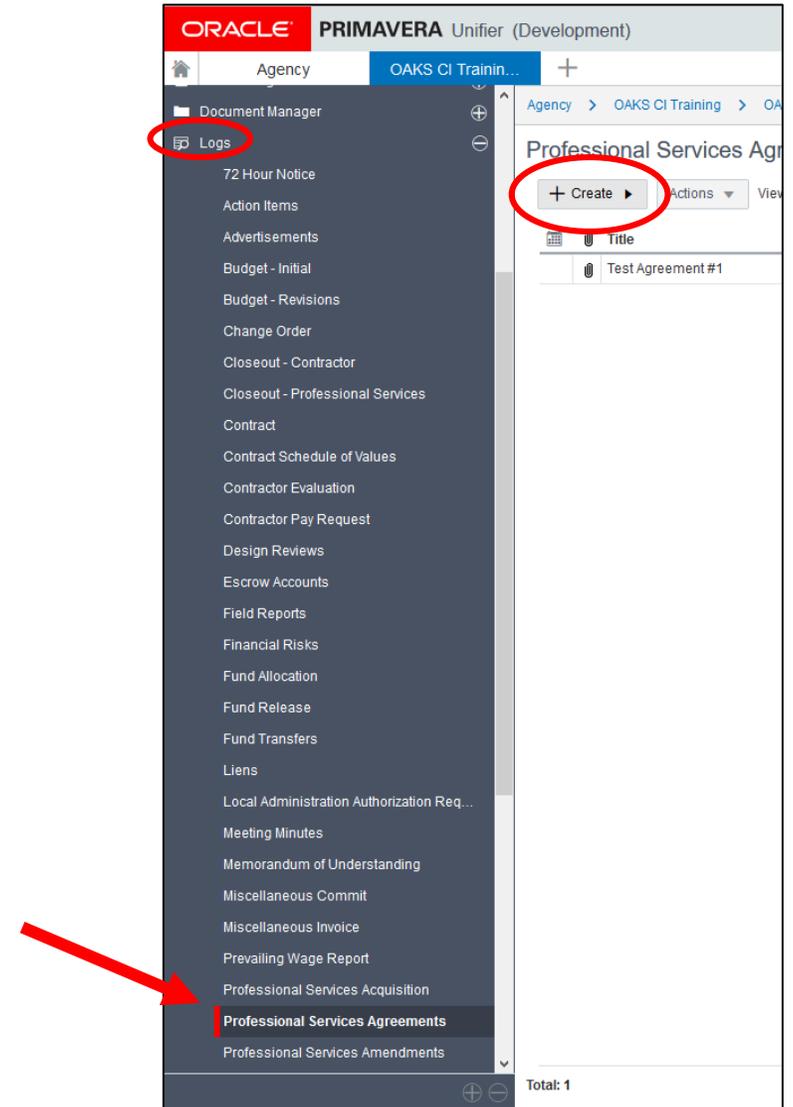
| Name | Number | Location |
|--|---------------|-------------------------------------|
| Ohio State Highway Patrol Post 44 | DPS:080001 | /Agency/Department of Public Safety |
| OSHP Post 23 LEADS Building | DPS:110001 | /Agency/Department of Public Safety |
| ODPS ACF Standing Seam Roof Renovation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

The search bar is highlighted with a blue circle 'b' and a red arrow. The dropdown menu is highlighted with a blue circle 'c' and a red arrow. The search bar contains the text "DPS-". The dropdown menu is open, showing the list of projects. The search bar is also highlighted with a red box and a plus sign icon.



Professional Services Agreement Create (A/E)

- ▶ You are now on your project home page, on left side of screen:
- ▶ Click **Logs** -> **Professional Services Agreement**
- ▶ Click **Create**



Professional Services Agreement – Create (A/E)

- a) Fill out the General section (All Items with a red * are required)
- b) Scroll down to the Vendor Information section
- c) To enter your information, click arrow and choose the appropriate vendor record

General

| | |
|------------------------------|-------------------|
| Organization | Record Number |
| OAKS CI Test | |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | |
| Project Location | Status |
| OAKS CI Administration | |
| Title * | Fee Title |
| OCI General 080001-02 | OFCC Standard Fee |
| | EDGE Waiver |
| | Select |
| | EDGE Goal Percent |
| | 0 |

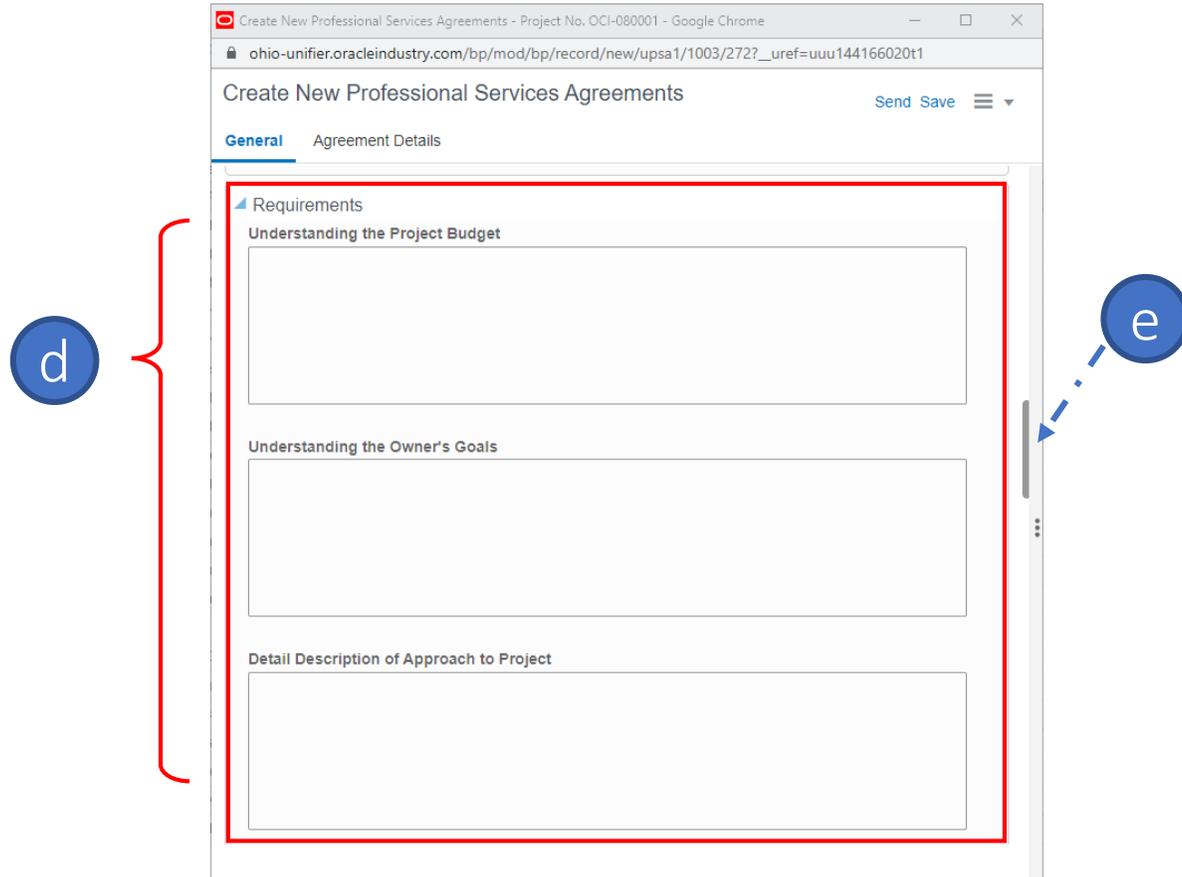
Vendor Information

| | |
|---|-------------------|
| Professional Services Provider * | PS Acquisition |
| OCI Test General | Type a Title... |
| Vendor Legal Name | EDGE Certified? * |
| n/a | Yes |
| | Joint Venture |
| | No |
| Change Order Fee Percentage | Agreement Type * |
| 0 | Design |
| Change Order Fee Allowance (\$) | Other Description |
| 0.00 | |
| Minimum Cnstr. Administration of hours/wk | |
| 0 | |



Professional Services Agreement – Create (A/E)

- d) Scroll down to the Requirements section and fill out all necessary information
- e) Scroll down to the Fee Summary section



Professional Services Agreement – Create (A/E)

- f) For each category in the Fee Summary block, enter the negotiated amounts

f

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?__uref=uuu144166020t1

Create New Professional Services Agreements

General Agreement Details

Fee Summary

| | |
|---|------------|
| Basic Services Amount (\$) | 100,000.00 |
| Basic Services Line Item Amount (\$) | 100,000.00 |
| Difference (\$) | 0.00 |
| Reimbursable Cost Amount (\$) | 50,000.00 |
| Reimbursable Cost Line Item Amount (\$) | 50,000.00 |
| Difference (\$) | 0.00 |
| Additional Services Amount (\$) | 25,000.00 |
| Additional Services Line Item Amount (\$) | 25,000.00 |
| Difference (\$) | 0.00 |
| Allowance Amount (\$) | 1,000.00 |
| Allowance Line Item Amount (\$) | 1,000.00 |
| Difference (\$) | 0.00 |

Total Agreement Amount (\$)



Professional Services Agreement – Create (A/E)

g) The amount entered from each category will be added to the **Total Agreement Amount** field at the bottom of the Fee Summary Block.

- ▶ You must now add Line Items to make the **Difference** \$0.00

Note: Each amount must be added as a separate line item (Basic services, additional services, etc.)

h) Click Agreement Details to add Line Items

Create New Professional Services Agreements

General Agreement Details

Difference (\$) 25,000.00

Allowance Amount (\$) 0.00

Allowance Line Item Amount (\$) 0.00

Difference (\$) 0.00

Total Agreement Amount (\$) 175,000.00

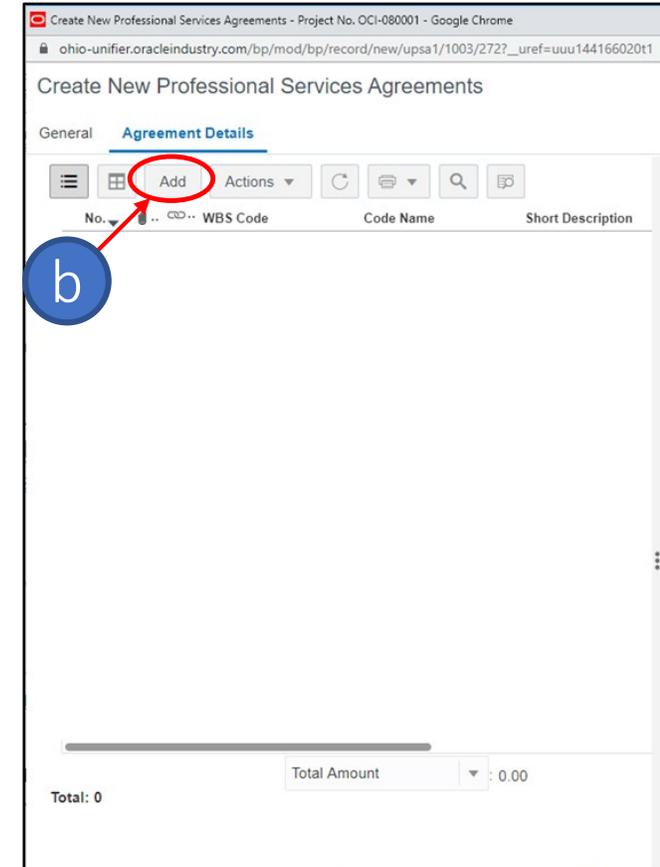
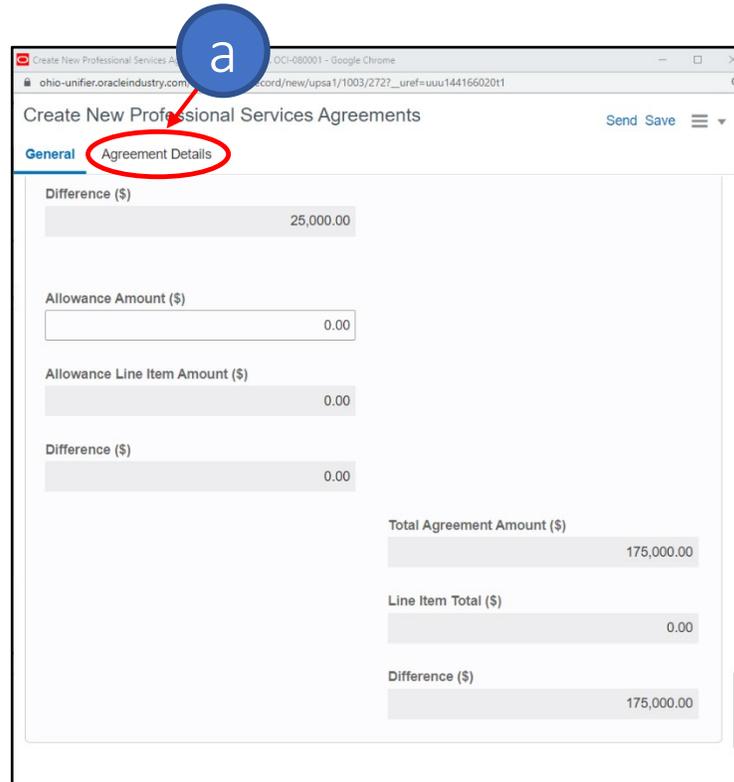
Line Item Total (\$) 0.00

Difference (\$) 175,000.00



Professional Services Agreement – Create (A/E)

- a) Open the **Agreement Details** Tab
- b) Click **Add** to begin adding Line Items



Professional Services Agreement – Create (A/E)

- c) Click the arrow next to CBS Code
- d) In the new window, click the Collapse button

The screenshot shows the 'Create New Professional Services Agreements' form. The 'WBS Code' field is highlighted with a blue circle labeled 'c', and a red arrow points to the dropdown arrow next to it. The form includes sections for 'General', 'Line Item Details', and 'Fee Category'.

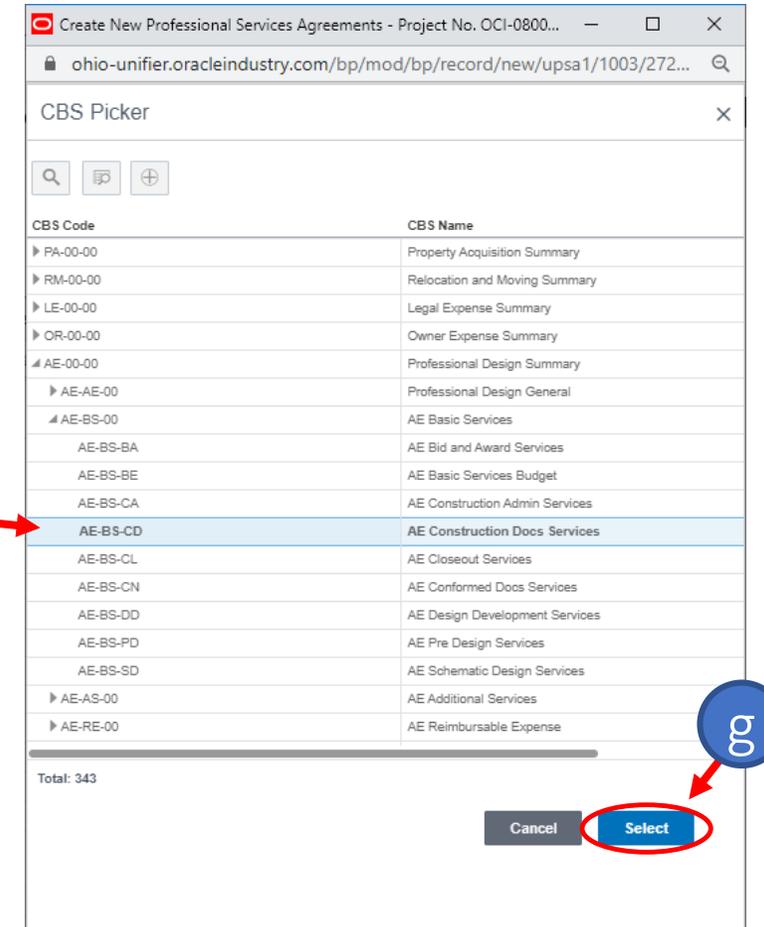
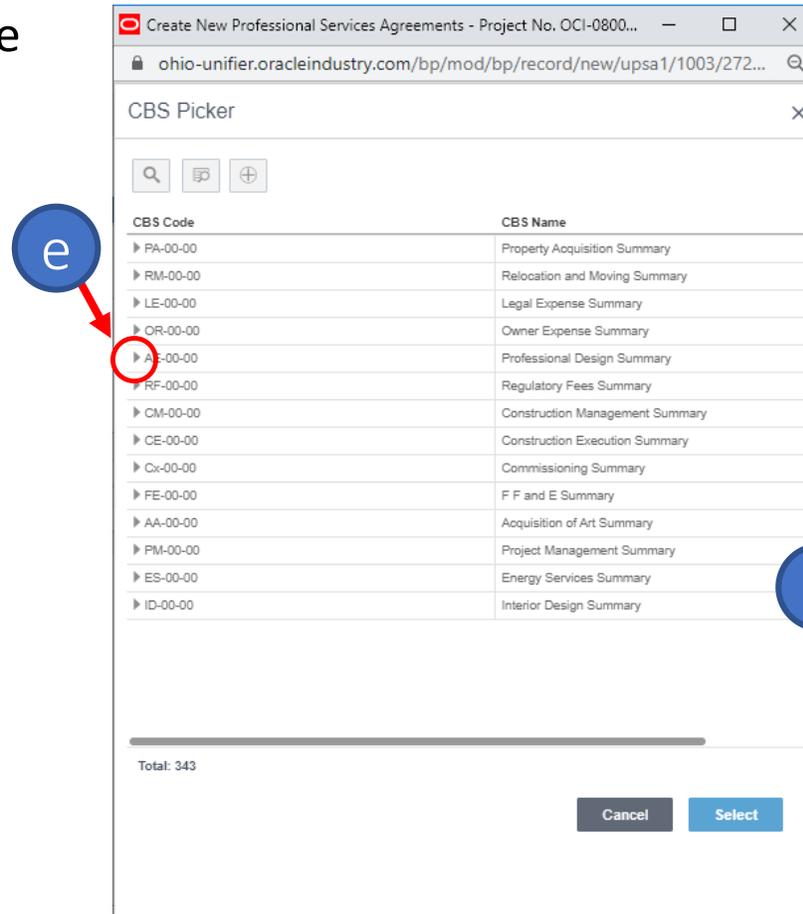
The screenshot shows the 'CBS Picker' dialog box. A blue circle labeled 'd' points to a collapse button (minus sign) in the top left corner. The dialog displays a list of CBS codes and names, with a 'Total: 343' at the bottom and 'Cancel' and 'Select' buttons.

| CBS Code | CBS Name |
|----------|-------------------------------|
| PA-00-00 | Property Acquisition Summary |
| PA-PA-00 | Property Acquisition General |
| PA-PA-AP | Real Estate Appraisal |
| PA-PA-BE | Property Acquisition Budget |
| PA-PA-RC | Real Estate Commission |
| PA-LA-00 | Land Acquisition Summary |
| PA-LA-BE | Land Acquisition Budget |
| PA-LA-OT | Land Acquisition Expense |
| PA-EA-00 | Easement Acquisition Summary |
| PA-EA-BE | Easement Acquisition Budget |
| PA-EA-OT | Easement Acquisition Expense |
| RM-00-00 | Relocation and Moving Summary |
| RM-RM-00 | Relocation and Moving Expense |
| RM-RM-BE | Relocation and Moving Budget |
| RM-RM-LS | Leased Temporary Space |
| RM-RM-MX | Moving Expense |
| LE-00-00 | Legal Expense Summary |
| LE-LE-00 | General Legal Expense |



Professional Services Agreement – Create (A/E)

- e) Click the arrow next to the AE Line
- f) Choose a category
- g) Click **Select**



Professional Services Agreement – Create (A/E)

h) Enter a Short Description

i) Enter Fee Category Information

- ▶ See example Line Items to the right:
 - ▶ The Line Item in Example 1 identifies Basic Services
 - ▶ The Line Item in Example 2 falls under Reimbursable Costs
 - ▶ **The record will not move forward if the amounts are in the incorrect Fee Category**

j) Click “Save & Add New” to continue adding all necessary line

Example 1

Example 1 screenshot showing the 'Line Item Details' form. The 'Short Description' field is highlighted with a red box and labeled 'h'. The 'Basic Services Amount (\$)' field is highlighted with a red box and labeled 'i'. The 'Save & Add New' button is highlighted with a red arrow and labeled 'j'.

Example 2

Example 2 screenshot showing the 'Line Item Details' form. The 'Reimbursable Cost Amount (\$)' field is highlighted with a red box.



Professional Services Agreement – Create (A/E)

- ▶ Line Items will populate under Agreement Details

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?_uref=uuu144166020t1

Create New Professional Services Agreements

Send Save

General Agreement Details

Line Item Details Attachments Linked Records

| No. | WBS Code | Code Name | Short Description | Basic Services (%) | Amount |
|-----|----------|--------------------------|-----------------------|--------------------|------------|
| 003 | AE-BS-PD | AE Pre Design Services | Additional | 0 | 25,000.00 |
| 002 | AE-AS-TI | AE Tests and Inspections | Tests and Inspections | 0 | 50,000.00 |
| 001 | AE-BS-CD | AE Construction Doc... | Pre Design | 100 | 100,000.00 |

Total: 3

Total Amount: 175,000.00

Line Item Details (Selected Row: 001)

General

WBS Code *
AE-BS-CD

Code Name
AE Construction Docs Services

Short Description *
Pre Design

Professional Services EDGE Certified?
No

Subcontractor/Supplier
Type a Subcontractor/Supplier...

EDGE Certified?

Cancel Save Save & Add New



Professional Services Agreement – Create (A/E)

- ▶ When all line items have been added, take note of the **Total Amount** on the Agreement Details tab.
- ▶ This should match the Total Agreement Amount from the General tab and the Difference should be **\$0.00** (see next slide)

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?_uref=uuu144166020t1

Create New Professional Services Agreements

General **Agreement Details**

☰ Add Actions ↕ ↻ 🗨️ 🔍 📄

| No. ▼ | 📄 | WBS Code | Code Name | Short Description | Basic Services (%) | Amount |
|-------|----|----------|--------------------------|------------------------|--------------------|------------|
| 004 | ⚙️ | OR-CF-AE | AE Change Order Allow... | Change Order Allowance | 0 | 1,000.00 |
| 003 | | AE-BS-PD | AE Pre Design Services | Additional | 0 | 25,000.00 |
| 002 | | AE-AS-TI | AE Tests and Inspections | Tests and Inspections | 0 | 50,000.00 |
| 001 | | AE-BS-CD | AE Construction Docs ... | Pre Design | 100 | 100,000.00 |

Total: 4

Total Amount ▼ : 176000.00



Professional Services Agreement – Create (A/E)

- a) Open the **General** tab
- b) Scroll down to the bottom of the Fee Summary section
- c) Ensure the Total Agreement Amount is equal to the Line Item Total, and the Difference is \$0.00

Additional Services Line Item Amount (\$) 25,000.00

Difference (\$) 0.00

Allowance Amount (\$) 1,000.00

Allowance Line Item Amount (\$) 1,000.00

Difference (\$) 0.00

Total Agreement Amount (\$) 176,000.00

Line Item Total (\$) 176,000.00

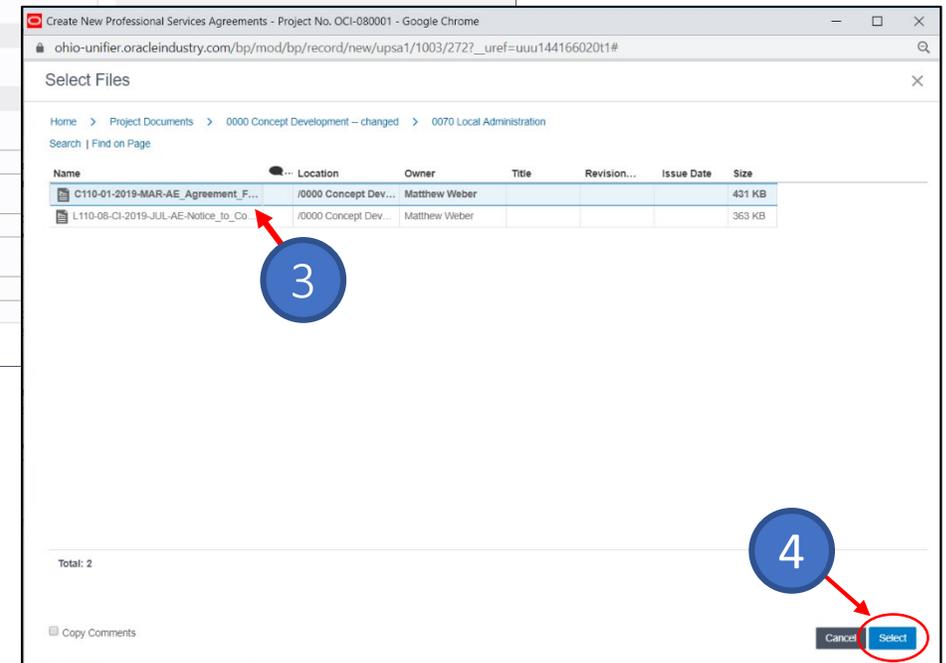
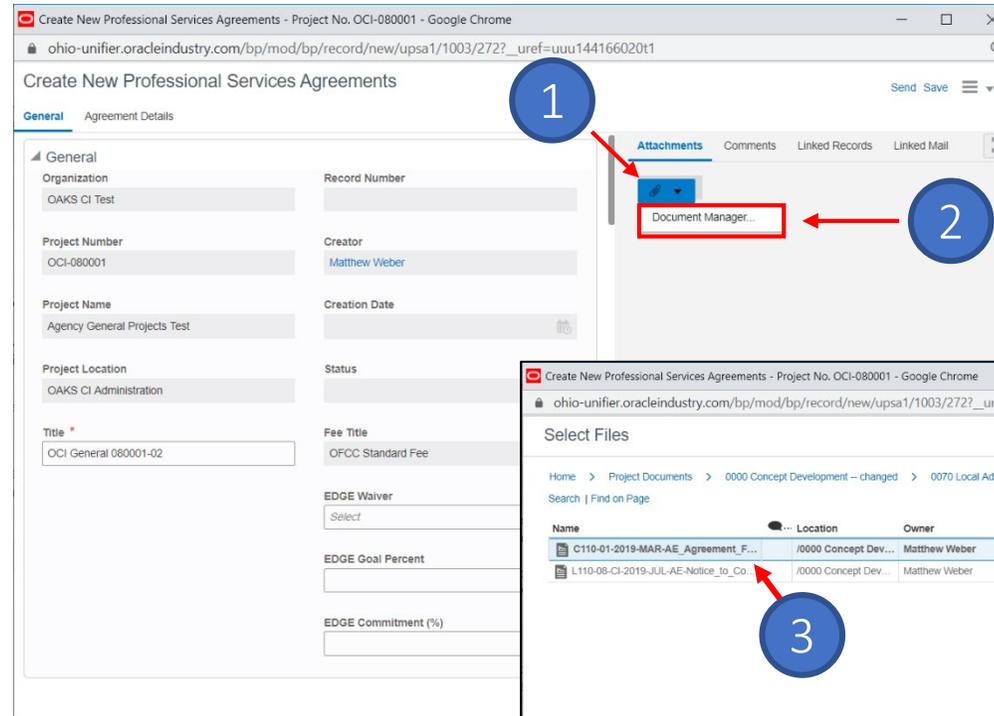
Difference (\$) 0.00



Professional Services Agreement – Create (A/E)

Upload all documents to [Document Manager](#) prior to attaching documents

- 1) Under the **Attachments** tab on the right side of the record, click the attachments button
- 2) Choose **Document Manager**
- 3) Navigate to the folder where the document is stored; select the document you wish to attach
- 4) Click **Select**



Professional Services Agreement – Create (A/E)

The Document Manager screen will close:

The added attachment(s) will be updated and display under the Attachments tab

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

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?_uref=uuu144166020t1#

Create New Professional Services Agreements ➔ Send Save

General Agreement Details

General

Organization: OAKS CI Test Record Number: []

Project Number: OCI-080001 Creator: Matthew Weber

Project Name: Agency General Projects Test Creation Date: []

Project Location: OAKS CI Administration Status: []

Title *: OCI General 080001-02 Fee Title: OFCC Standard Fee

EDGE Waiver: Select

EDGE Goal Percent: 0

EDGE Commitment (%): 0

Attachments Comments Linked Records Linked

Published Attachments

| Name | Title |
|------------------------|-------|
| C110-01-2019-MAR-AE... | |

Total: 1



Professional Services Agreement – Create (A/E)

- ▶ Verify Workflow Action - **Submit**
- ▶ Click **Send**
- ▶ The record will move forward to the PM for Technical Proposal Review and Contract Preparation

The screenshot displays the 'Create New Professional Services Agreements' form in Google Chrome. The browser address bar shows the URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa1/1003/272?_uref=uuu144166020t1#. The form is in the 'General' tab, and the 'Workflow Action Details' modal is open. The modal contains the following fields:

- Workflow Actions ***: A dropdown menu with 'Submit' selected, highlighted by a red box.
- To**: A text field containing 'Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Manager'.
- Send For**: A text field containing 'Technical Proposal Review and'.
- CC**: A text field with the placeholder 'Start typing for suggestions...'.
- Due Date Details**: A section with a message 'Task Due Date is not available' and an information icon.
- Buttons**: 'Cancel' and 'Send' buttons at the bottom right, with a red arrow pointing to the 'Send' button.



Professional Services Agreement Technical Proposal Review and Contract Preparation (PM)



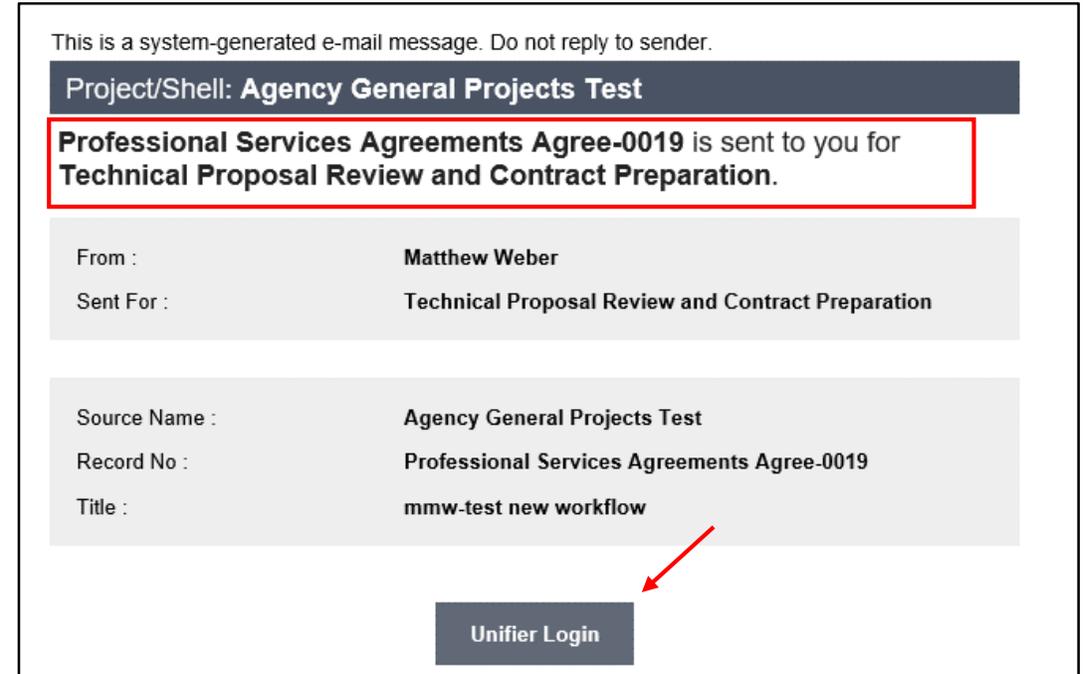
Professional Services Agreement Technical Proposal Review and Contract Preparation (PM)

- ▶ The technical proposal contains information important to the negotiation and contract execution process including:
 - ▶ A statement of the recommended firm's understanding of the project
 - ▶ A proposed management approach
 - ▶ Proposed design and project schedules
 - ▶ A proposal of basic and additional service fees
 - ▶ A proposed project budget summary and other relevant information
- ▶ The Project Manager will:
 - ▶ Review the submission
 - ▶ If necessary, return the record to the Professional Services Provider for clarification or updates to the proposal **OR** Accept the proposal as submitted and forward it to the Project Coordinator to prepare the Contract



Technical Proposal Review and Contract Preparation (PM)

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



Technical Proposal Review and Contract Preparation (PM)

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

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2593221?task_id=2593221&parent_id=0&viewOnly=0&project_id=...`. The page title is "Professional Services Agreements". In the top right corner, there are two buttons: "Accept" and "Decline". The "Accept" button is circled in red, and a red arrow points to it from the left. Below the title, there are tabs for "General", "Agreement Details", and "Purchase Order". The "General" tab is active. The main content area is divided into two sections: "Task Details" and "General".

Task Details

- From:** Matthew Weber
- To:** Archana Atrey, Matthew Weber, Rita Nichols, Shauna Hooks, Steve Mayo, Proje...
- Sent For:** Technical Proposal Review and Contract Preparation

General

| | | | |
|-----------------------|------------------------------|----------------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | Agree-0024 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/14/2020 02:55 PM (UTC-5) |

Attachments

| Name | ... | Titl |
|---|-----|------|
| Published Attachments | | |
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... | | |

Total: 1



Technical Proposal Review and Contract Preparation (PM)

- a) In the General tab, complete all required fields
- b) Use the slider to scroll through the entire section

The screenshot shows a web browser window displaying a form titled "Professional Services Agreements" for Project No. OCI-080001. The form is in the "General" tab, which is highlighted with a blue circle and an arrow labeled 'a'. The form contains several fields: Organization (OAKS CI Test), Record Number (Agree-0024), Project Number (OCI-080001), Creator (Matthew Weber), Project Name (Agency General Projects Test), Creation Date (04/14/2020 02:55 PM (UTC-5)), Project Location (OAKS CI Administration), Status (Pending), Title (OCI General 080001-02), Fee Title (OFCC Standard Fee), Selection Method (Competitive Selection, highlighted with a red box), EDGE Waiver, Project Start Date (11/15/2008 12:00 PM (UTC-5)), and EDGE Goal Percent (0). On the right side, there is an "Attachments" section with a slider and a "Total: 1" indicator. A blue circle and arrow labeled 'b' points to the slider.



Technical Proposal Review and Contract Preparation (PM)

- c) Review Attachments on the right-hand side of the record
- d) Once all required fields have been entered, move the record forward by clicking **Send**

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2593221/undefined/undefined?_af835605003t1

Professional Services Agreements

General Agreement Details

| | |
|---|------------|
| Additional Services Amount (\$) | 25,000.00 |
| Additional Services Line Item Amount (\$) | 25,000.00 |
| Difference (\$) | 0.00 |
| Allowance Amount (\$) | 1,000.00 |
| Allowance Line Item Amount (\$) | 1,000.00 |
| Difference (\$) | 0.00 |
| Total Agreement Amount (\$) | 176,000.00 |
| Line Item Total (\$) | 176,000.00 |
| Difference (\$) | 0.00 |

Attachments Cor >

Published Attachments

C110-01-2019-

Total: 1



Send Record (PM)

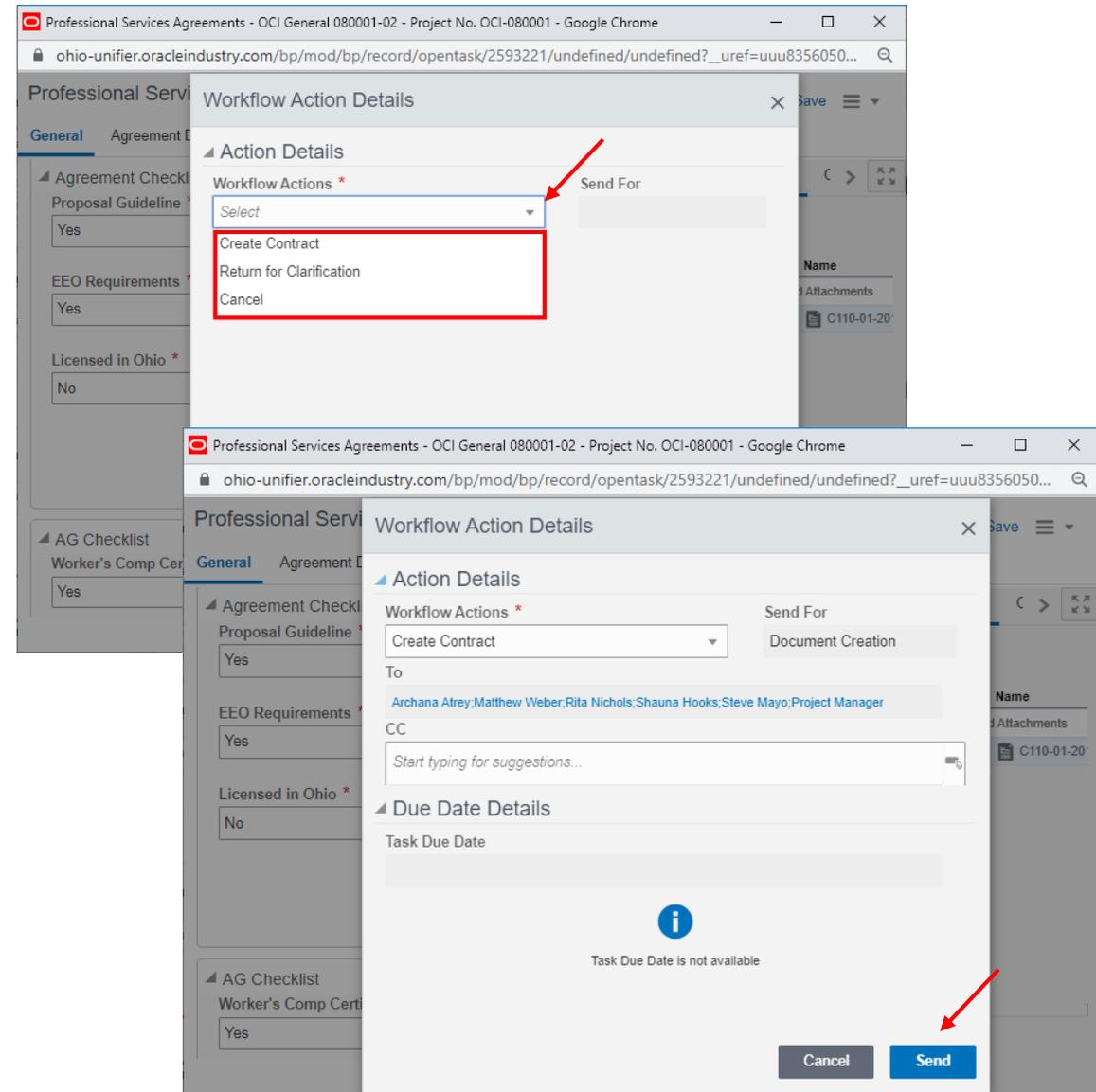
- ▶ Select the **Workflow Action**

- ▶ If record is correct and ready to move forward to PM Document Creation:

- ▶ Choose **Create Contract**
 - ▶ Click Send

- ▶ If record must be returned for Update:

- ▶ Add a General Comment. See [General Comments](#) section for instructions.
 - ▶ Choose **Return for Clarification**
 - ▶ Click Send



Professional Services Agreement Document Creation (PM)



Professional Services Agreement Document Creation (PM)

- ▶ The Project Manager will:
 - ▶ Prepare the Agreement documents once the terms and conditions of the Technical Proposal are agreed upon by the Project Manager and Professional Services Provider
 - ▶ Review and verify receipt of Agreement and AG Checklist information required in the contract execution process
 - ▶ Create the Agreement Document and distribute to all necessary parties



Document Creation (PM)

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

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

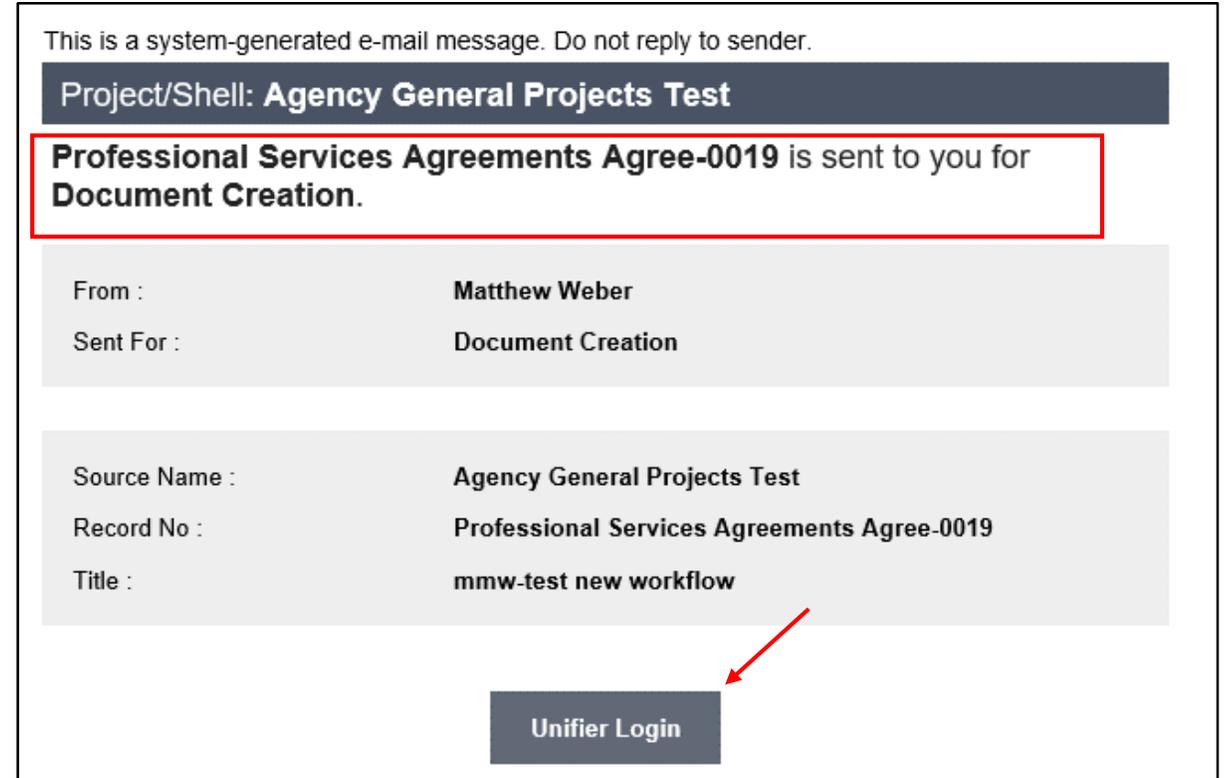
Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for Document Creation.

From : Matthew Weber
Sent For : Document Creation

Source Name : Agency General Projects Test
Record No : Professional Services Agreements Agree-0019
Title : mmw-test new workflow

[Unifier Login](#)



Document Creation (PM)

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

The screenshot shows a web browser window with the URL: `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2593339?task_id=2593339&parent_id=0&viewOnly=0&project_id...`. The page title is "Professional Services Agreements".

At the top right, there are two buttons: "Accept" and "Decline". The "Accept" button is circled in red, and a red arrow points to it from the left.

The main content area is divided into two sections:

- Task Details:**
 - From:** Matthew Weber
 - To:** Archana Atrey, Matthew Weber, Rita Nichols, Shauna Hooks, Steve Mayo, Proj...
 - Sent For:** Document Creation
- General:**

| | | | |
|-------------------------|------------------------------|----------------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | Agree-0024 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | | Status | |

On the right side, there is an "Attachments" section with a table of "Published Attachments". The table has columns for "Name" and "Total: 1". One attachment is listed: "C110-01-2019-MAR-AE_...".

Document Creation (PM)

- ▶ Ensure all supporting documentation has been attached at some point in the agreement process:
- ▶ Complete all necessary fields *

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/open/upsa1/3226/0/0?srcid=3226&model=upsa1&fromcostlog=1&pr...

Professional Services Agreements

Send Save

General Agreement Details

General

Organization: OAKS CI Test

Record Number: Agree-0024

Project Number: OCI-080001

Creator: Matthew Weber

Project Name: Agency General Projects Test

Creation Date: 04/14/2020 02:55 PM (UTC-5)

Project Location: OAKS CI Administration

Status: Pending

Title: OCI General 080001-02

Fee Title: OFCC Standard Fee

Selection Method *: Competitive Selection

EDGE Waiver

Project Start Date: 11/15/2008 12:00 PM (UTC-5)

EDGE Goal Percent

Professional Services Agreements

Send Save

General Agreement Details

Agreement Checklist

Proposal Guideline *: Yes

Agreement Summary *: Yes

EEO Requirements *: Yes

EDGE Participation *: No

Licensed in Ohio *: No

Professional Liability Insurance *: Yes

Insurance Rating *: High

AG Checklist

Worker's Comp Certificate *: Yes

Worker's Comp Certificate Exp. Date *: 04/01/2021 05:00 PM (UTC-5)

Clean Search of State Auditor's Database *: Yes

Release and Permit Information

DAS Release and Permit

OIT Release and Permit

Attachments

Published Attachments

C110-01-2019-MA

Total: 1

Document Creation (PM)

Once record is complete:

- a) Click the Menu at the top right of the record
- b) Click **Print**
- c) Select **Custom**

The screenshot shows a web browser window displaying the 'Professional Services Agreements' record page. The page title is 'Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/open/upsa1/3226/0/0?srcid=3226&model=upsa1&fromcostlog=1&pr...'. The page content includes a 'General' tab and a table of record details. A menu is open at the top right, showing options like 'Export Line Item Template', 'Print', 'Reload', 'Review', 'Terminate Record', 'Transfer Ownership...', 'Undo Accept Task', 'Help', and 'Close'. A red arrow labeled 'a' points to the menu icon. A red arrow labeled 'b' points to the 'Print' option. A red arrow labeled 'c' points to the 'Custom ...' option in the print submenu. The record details table is as follows:

| Field | Value |
|------------------|------------------------------|
| Organization | OAKS CI Test |
| Record Number | Agree-0024 |
| Project Number | OCI-080001 |
| Creator | Matthew Weber |
| Project Name | Agency General Projects Test |
| Creation Date | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | OAKS CI Administration |
| Status | Pending |
| Title | OCI General 080001-02 |
| Fee Title | OFCC Standard Fee |



Document Creation (PM)

- d. Select: Agreement
- e. Click : **OK**

Custom Format Print - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/studio/bp/selectPrintFile?bp_...

Select a custom print template

Title ▲

- AE Notice to Proceed 2017-AUG
- C110-01-2019-MAR-AE_Agreement_Form_W7**
- C130-01-2019-MAR-Consultant_Agreement_W7
- C130-01-CI-2019-JUN-Consultant_Agreement_W7
- CMA Agreement Form 2017-JUN
- DRC AE Agreement 2015-JUN
- L110-01-2017-NOV-AE_Agreement_Recommendation
- L110-01-CI-2019-JUN-AE_Agreement_Recommendation_W7
- L110-03-CI-2019-APR-AE_Agreement_CB_Criteria_W7

Select a template and format to print

Template: -Select-

Format: -Select-

Select options for Workflow Progress

All Steps

Visited Steps

Sort by: Completion Date Ascending

OK Cancel

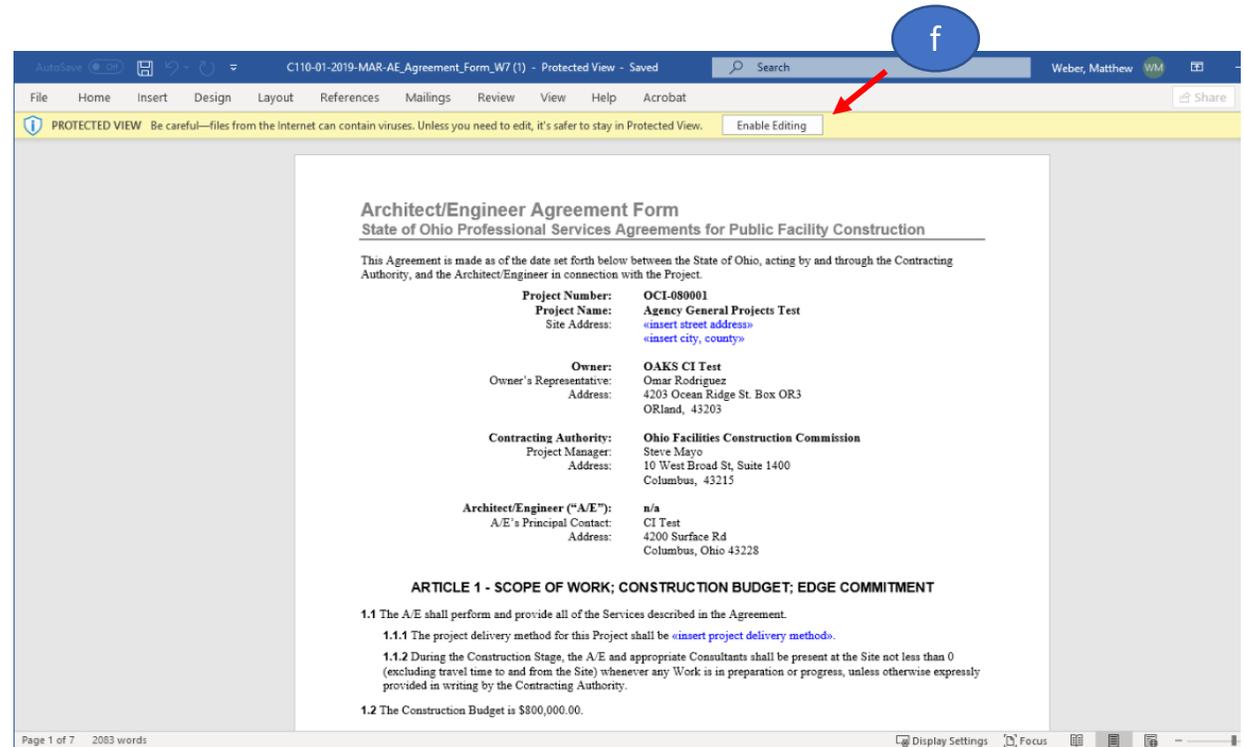


Document Creation (PM)

Open the document

f. Click Enable Editing and update any necessary fields.

Once complete, Save the document to your computer



Document Creation (PM)

Upload all documents to [Document Manager](#) prior to attaching documents

- 1) Under the **Attachments** tab on the right side of the record, click the attachments button
- 2) Choose **Document Manager**
- 3) Navigate to the folder where the document is stored; select the document you wish to attach
- 4) Click **Select**

The screenshot displays two browser windows. The top window, titled 'Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome', shows the 'Attachments' tab on the right side of the record. A blue circle with the number '1' points to the 'Attachments' button. A red box highlights the 'Document Manager...' option, with a blue circle and the number '2' pointing to it. The bottom window, titled 'Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome', shows a 'Select Files' dialog. A blue circle with the number '3' points to a document titled 'C110-01-2019-MAR-AE_Agreement_F...' in the file list. A blue circle with the number '4' points to the 'Select' button at the bottom right of the dialog.

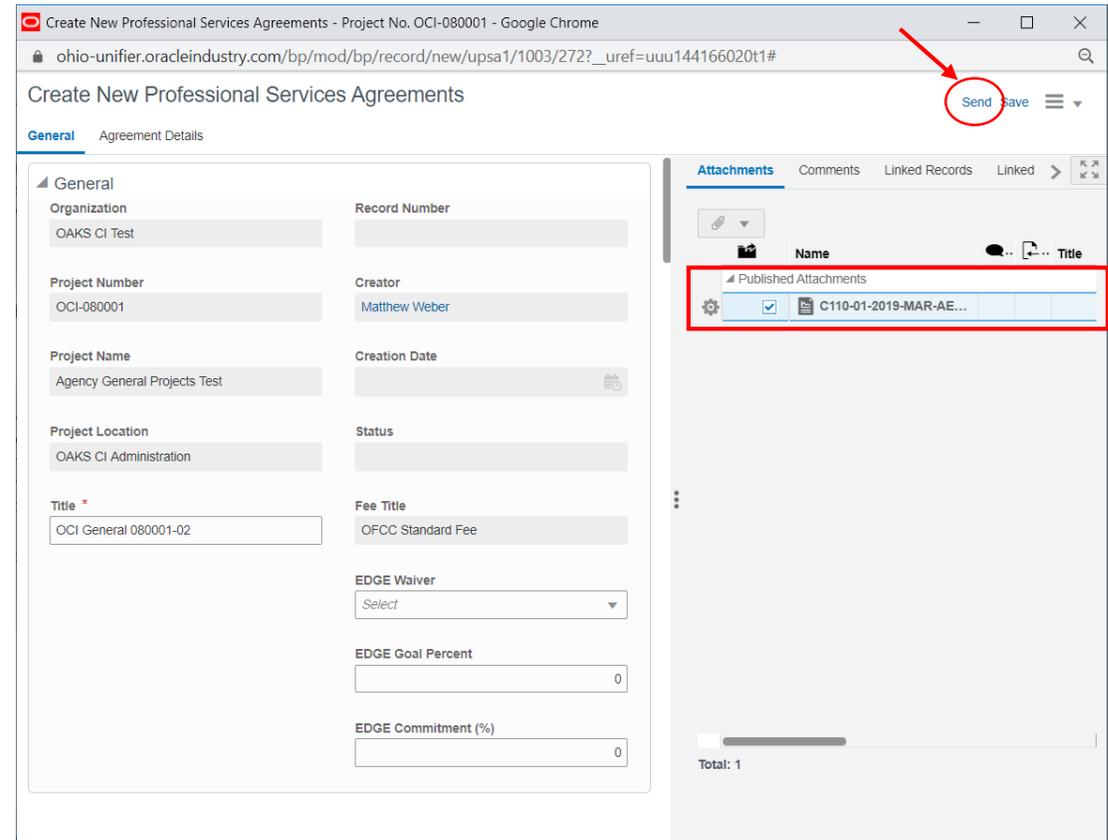


Document Creation (PM)

The Document Manager screen will close:

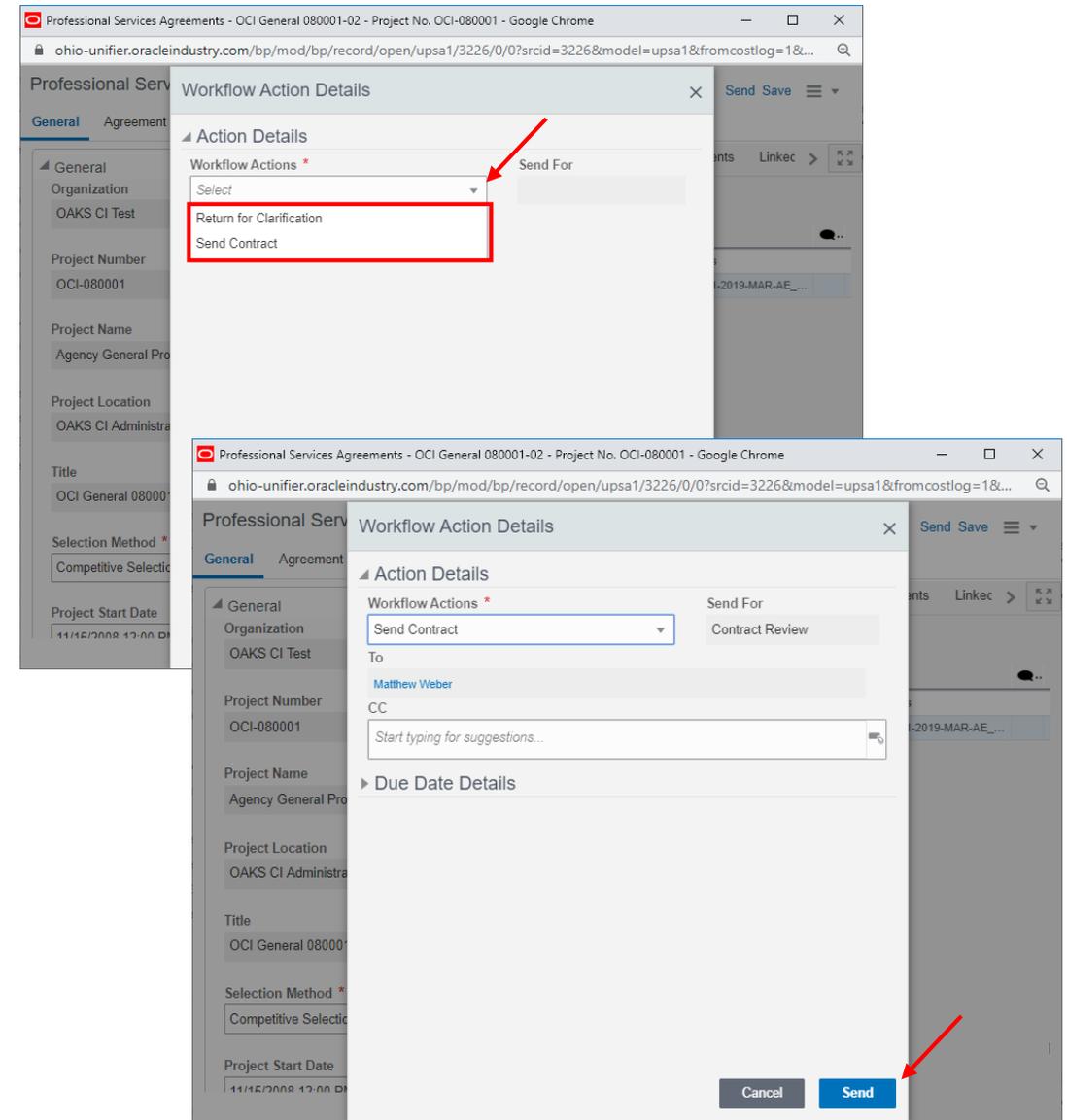
The added attachment(s) will be updated and display under the Attachments tab

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



Send Record (PM)

- ▶ Select the **Workflow Action**
 - ▶ If record is ready to move forward to A/E for Contract Review:
 - ▶ Choose **Send Contract**
 - ▶ Click **Send**
 - ▶ If record must be returned for Update:
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Professional Services Agreement Contract Review (A/E)



Professional Services Agreement Contract Review (A/E)

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

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

Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for Contract Review.

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

Source Name : **Agency General Projects Test**
Record No : **Professional Services Agreements Agree-0019**
Title : **mmw-test new workflow**

[Unifier Login](#)

Contract Review (A/E)

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

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

- Browser Tab:** Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome
- URL:** ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2603384?task_id=2603384&parent_id=0&viewOnly=0&projec...
- Page Title:** Professional Services Agreements
- Navigation:** General (selected), Agreement Details, Purchase Order
- Task Details:**
 - From: Matthew Weber
 - To: Matthew Weber
 - Sent For: Contract Review
- General Information:**

| | | | |
|------------------|------------------------------|---------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | Agree-0024 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | | Status | |
- Attachments:** C110-01-2019-MAR-AE...
- Buttons:** Accept (highlighted with a red arrow), Decline

Contract Review (A/E)

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

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2603384/undefined/undefined?__uref=uuu866865350t1

Professional Services Agreements Send Save

General Agreement Details

General

| | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | Agree-0024 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Title | Fee Title |
| OCI General 080001-02 | OFCC Standard Fee |
| Selection Method | EDGE Waiver |
| Competitive Selection | |
| | EDGE Goal Percent |
| | 0 |

Attachments

Published Attachments

C110-01-2019-MAR-AE_...

Total: 1



Contract Review (A/E)

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

The screenshot shows a web browser window displaying the Oracle Professional Services Agreements interface. The browser title is "Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2603384/undefined/undefined?__uref=uuu866865350t1". The page title is "Professional Services Agreements". The "Send" button is highlighted with a red circle and a red arrow pointing to it. The interface shows a "General" tab with the following details:

| General | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | Agree-0024 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Title | Fee Title |
| OCI General 080001-02 | OFCC Standard Fee |
| Selection Method | EDGE Waiver |
| Competitive Selection | |
| | EDGE Goal Percent |
| | 0 |

The "Attachments" tab is also visible, showing a list of published attachments with a total of 1 attachment.



Send Record (A/E)

- ▶ Select the **Workflow Action**
 - ▶ If record is ready to move forward to PM for Funding Certification
 - ▶ Choose **Accept**
 - ▶ Click **Send**
 - ▶ If record must be returned for Update:
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**

The image displays two screenshots of the 'Workflow Action Details' dialog box in a web browser. The top screenshot shows the 'Workflow Actions' dropdown menu with 'Accept' and 'Return for Clarification' options. A red arrow points to the 'Accept' option. The bottom screenshot shows the 'Send For' field set to 'Funding Certification', the 'To' field populated with 'Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Manager', and the 'Send' button highlighted with a red arrow.



Professional Services Agreement Funding Certification (PM)



Professional Services Agreement Funding Certification (PM)

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

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

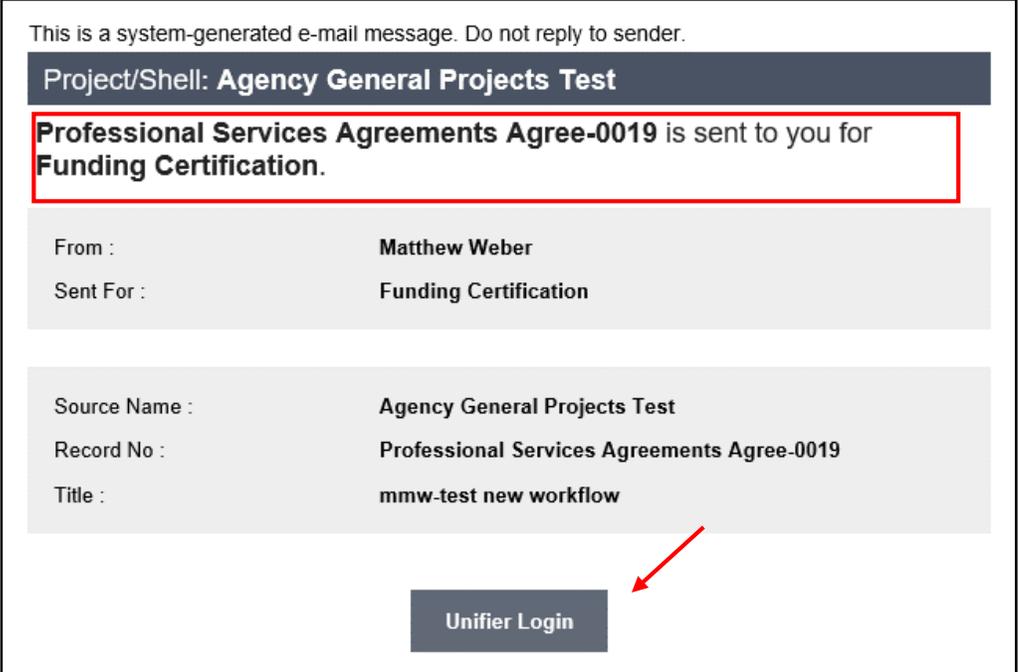
Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for Funding Certification.

From : Matthew Weber
Sent For : Funding Certification

Source Name : Agency General Projects Test
Record No : Professional Services Agreements Agree-0019
Title : mmw-test new workflow

[Unifier Login](#)



Funding Certification (PM)

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

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2603428?task_id=2603428&parent_id=0&viewOnly=0&project_id=1003&model=upsa1&__uref=u...

Professional Services Agreements Accept Decline

General Agreement Details Purchase Order

Task Details

From: Matthew Weber

To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Manager

Sent For: Funding Certification

General

| | | | |
|------------------|------------------------------|---------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | Agree-0024 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | OAKS CI Administration | Status | Accepted |

Attachments Comments Linked Records Linked Mail Wor

Published Attachments

| Name | Title |
|---|-------|
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... | |

Total: 1

Funding Certification (PM)

- ▶ Review information in General tab, scrolling down as necessary
- ▶ Review attachments

The screenshot displays a web application interface for 'Professional Services Agreements'. The main record is titled 'Professional Services Agreements' and is viewed in the 'General' tab. The 'Attachments' sub-tab is highlighted with a red circle. A red arrow points to the 'General' tab, and a blue arrow points to the 'Attachments' sub-tab. The 'General' tab contains the following information:

| Field | Value |
|-------------------|------------------------------|
| Organization | OAKS CI Test |
| Record Number | Agree-0024 |
| Project Number | OCI-080001 |
| Creator | Matthew Weber |
| Project Name | Agency General Projects Test |
| Creation Date | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | OAKS CI Administration |
| Status | Accepted |
| Title | OCI General 080001-02 |
| Fee Title | OFCC Standard Fee |
| Selection Method | Competitive Selection |
| EDGE Waiver | |
| EDGE Goal Percent | |

The 'Attachments' sub-tab shows a table of published attachments:

| Name | Title |
|------------------------|-------|
| C110-01-2019-MAR-AE... | |

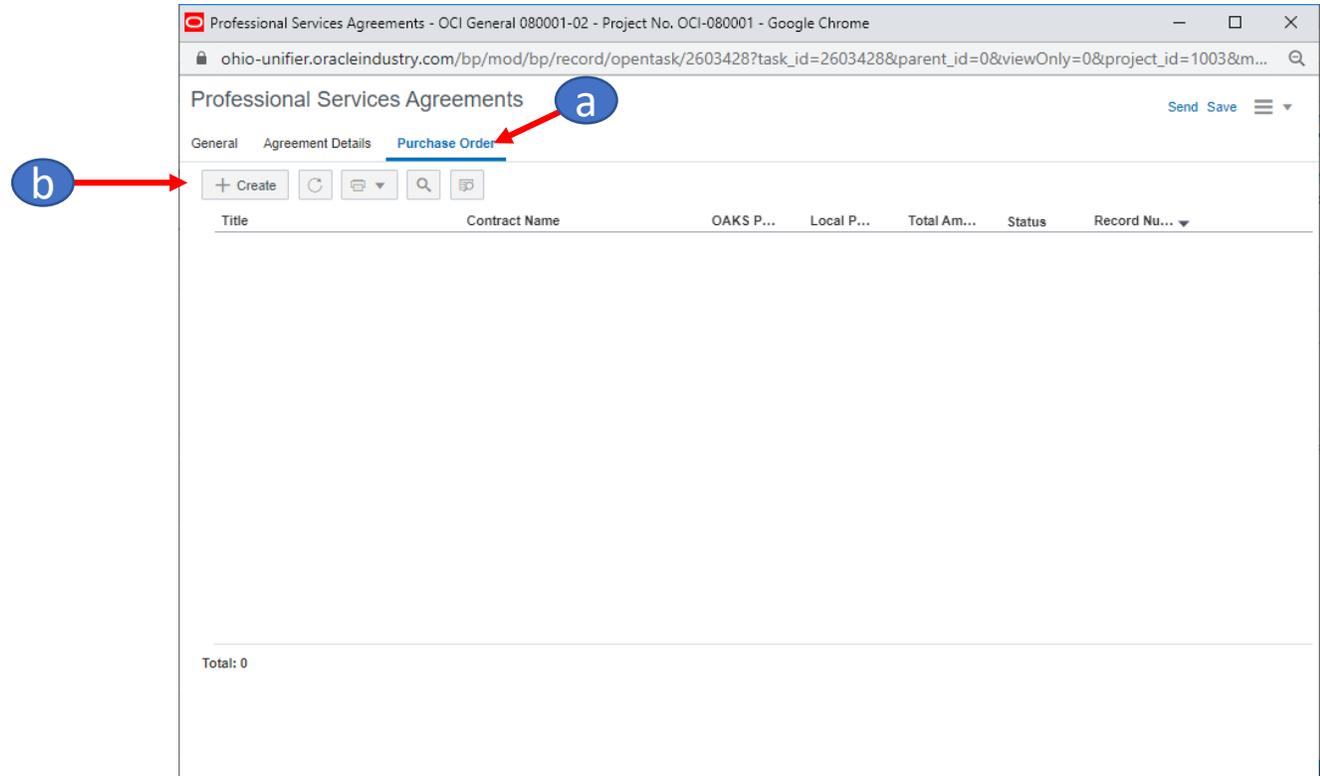
Total: 1



Funding Certification (PM)

▶ **Record the Purchase Order information in this record:**

- a. Open the Purchase Order tab
- b. Click Create



Record Purchase Order (PM)

Record the Purchase Order in this record:

- c. Complete the General block, scrolling down to all required fields
- d. In PO Type section, **Keep OAKS PO Amount field empty**
- e. Click PO Distribution Lines tab to add Fund Codes

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1003/0/1/gen_ps_agreement_name_bp/32...

Create New Purchase Orders Submit Save

General PO Distribution Lines e

General

Organization: OAKS CI Test

Record Number: [Empty]

Project Number: OCI-080001

Creator: Matthew Weber

Project Name: Agency General Projects Test

Creation Date: [Empty]

Project Location: OAKS CI Administration

Status: Select

Title: Matt's Consulting OCI-00081_PR1

PO Purpose: Select

Vendor: Type a Vendor Name...

Financial System of Record: Select

Change Status: Select

c

Create New Purchase Orders Submit Save

General PO Distribution Lines

PO Details

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

OAKS PO No. [Empty] OAKS PO Amount (\$) 0.00

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

Date Dispatched: MM/DD/YYYY HH:MM AM

Created by Integration: Select

Local PO No. [Empty] Local PO Amount (\$) 0.00

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

Date Dispatched: MM/DD/YYYY HH:MM AM

d



Record Purchase Order (PM)

Complete Record:

- h. Click General tab
View upper form
- i. Enter the OAKS PO Amount
- j. Click Submit Editing

The screenshot shows a web browser window titled "Create New Purchase Orders - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1/gen_ps_agreement_n...". The page title is "Create New Purchase Orders". There are two tabs: "General" (selected) and "PO Distribution Lines". A "Submit Save" button is visible in the top right. The "PO Details" section contains the following fields:

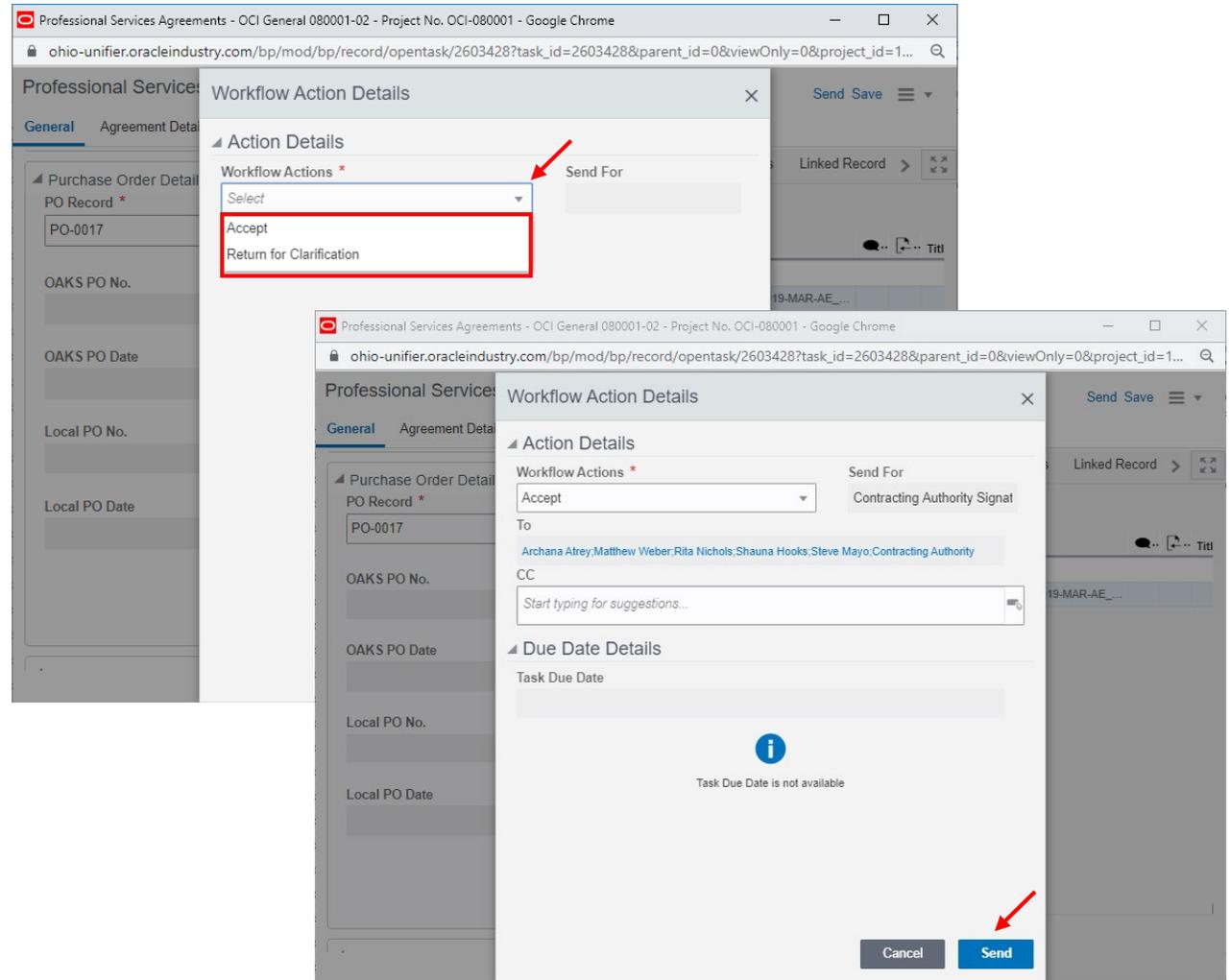
- OAKS PO No. (empty)
- OAKS PO Amount (\$) (176,000.00)
- OAKS PO Date (MM/DD/YYYY HH:MM AM)
- Date Dispatched (MM/DD/YYYY HH:MM AM)
- Created by Integration (Select)
- Local PO No. (empty)
- Local PO Amount (\$) (0.00)
- Local PO Date (empty)

Annotations: A blue circle with 'h' points to the "General" tab. A blue circle with 'j' points to the "Submit Save" button. A blue circle with 'i' points to the "OAKS PO Amount (\$)" field.



Record Purchase Order (PM)

- ▶ If record is ready to move forward to Contracting Authority for Signature
 - ▶ Choose **Accept**
 - ▶ Click Send
- ▶ If record must be returned for Update
 - ▶ Choose **Return for Clarification**
 - ▶ Click Send



Professional Services Agreement Contracting Authority Signature



Professional Services Agreement Contracting Authority Signature

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

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

Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for Contracting Authority Signature.

From : Matthew Weber
Sent For : Contracting Authority Signature

Source Name : Agency General Projects Test
Record No : Professional Services Agreements Agree-0019
Title : mmw-test new workflow

[Unifier Login](#)



Contracting Authority Signature

- ▶ Click: Accept Task

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604074?task_id=2604074&parent_id=0&viewOnly=0&project_id=1003&model...

Professional Services Agreements

[Accept](#) [Decline](#) ☰

[General](#) [Agreement Details](#) [Purchase Order](#)

Task Details

From: Matthew Weber

To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Contracting Authority

Sent For: Contracting Authority Signature

General

| | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | Agree-0024 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Accepted |

Attachments

| Name | Title |
|---|-------|
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... | |

Total: 1

Contracting Authority Signature

- ▶ View the attached documents
- ▶ Print and sign the agreement, scan copy to your computer
- ▶ Attach signed agreement to record

The screenshot displays a web application interface for 'Professional Services Agreements'. The browser address bar shows the URL: `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604074?task_id=2604074&parent_id=0&viewOnly=0&project_id=1003&model...`. The page title is 'Professional Services Agreements' with 'Accept' and 'Decline' buttons. The main content is divided into two columns. The left column contains 'Task Details' and 'General' information. The right column contains 'Attachments', 'Comments', 'Linked Records', and 'Linked Mai'. A red arrow points to a document icon in the 'Published Attachments' table.

| Task Details | |
|--------------|--|
| From | Matthew Weber |
| To | Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Contracting Authority |
| Sent For | Contracting Authority Signature |

| General | | | |
|------------------|------------------------------|---------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | Agree-0024 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | OAKS CI Administration | Status | Accepted |

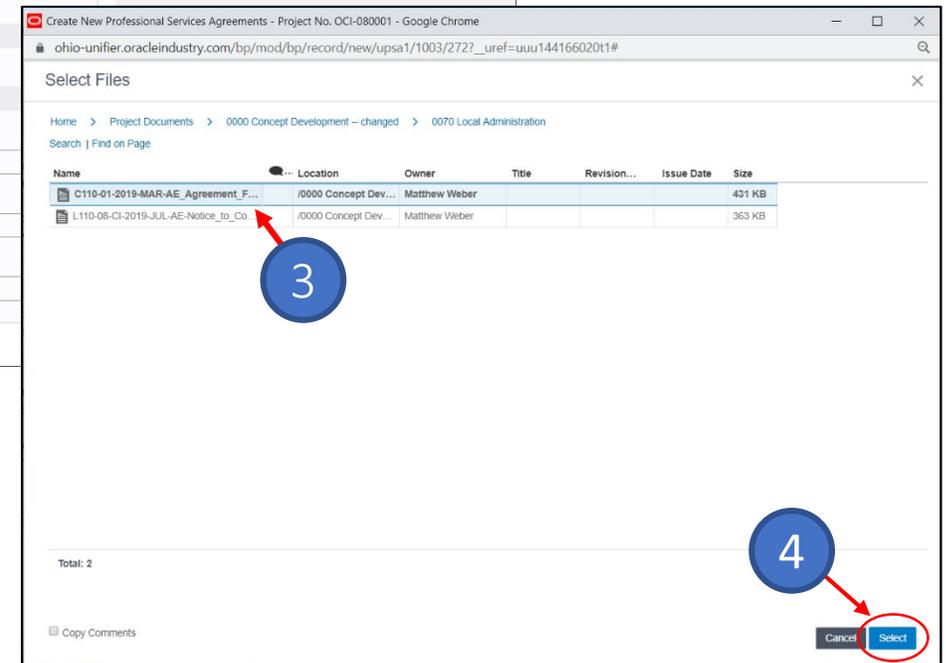
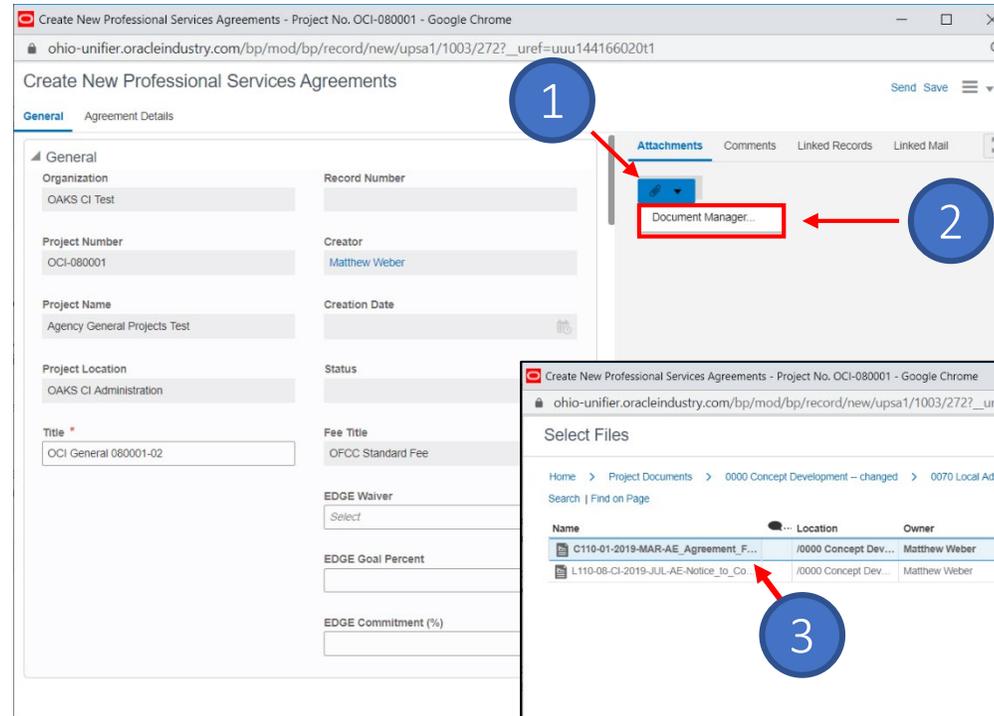
| Published Attachments | |
|---|-------|
| Name | Title |
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... | |

Total: 1

Contracting Authority Signature

Upload all documents to [Document Manager](#) prior to attaching documents

- 1) Under the **Attachments** tab on the right side of the record, click the attachments button
- 2) Choose **Document Manager**
- 3) Navigate to the folder where the document is stored; select the document you wish to attach
- 4) Click **Select**



Contracting Authority Signature

- ▶ The added document will appear under the Attachments section
- ▶ When the record is ready to move forward, click **Send**

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604074/undefined/undefined?__uref=uuu76683709t1`. The page title is "Professional Services Agreements". The interface is divided into two main sections: "General" and "Attachments".

General Section:

| | | | |
|------------------|------------------------------|---------------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | Agree-0024 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | OAKS CI Administration | Status | Accepted |
| Title | OCI General 080001-02 | Fee Title | OFCC Standard Fee |
| Selection Method | Competitive Selection | EDGE Waiver | |
| | | EDGE Goal Percent | 0 |
| | | EDGE Commitment (%) | 0 |

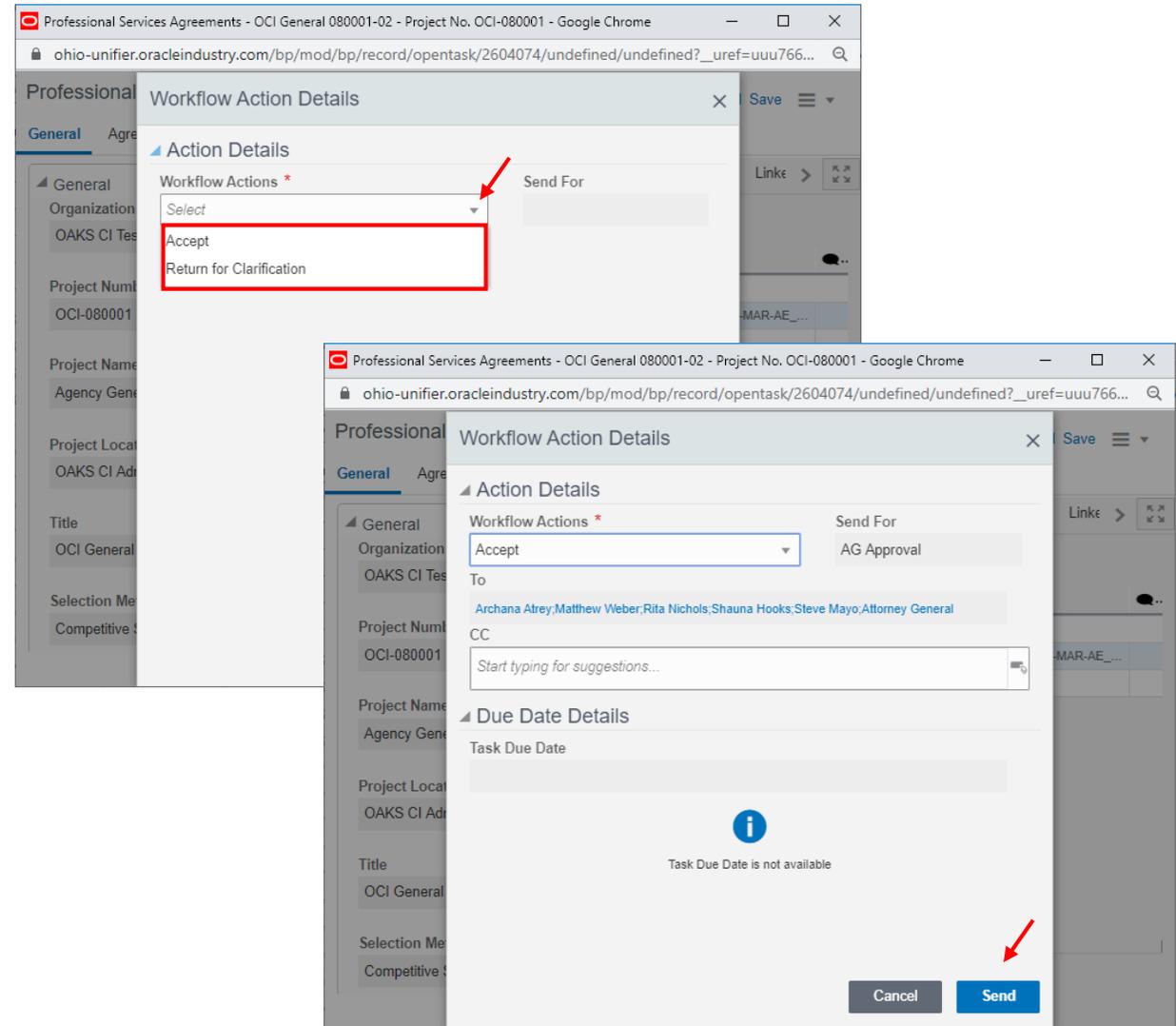
Attachments Section:

| Name | Title |
|-------------------------|-------|
| C110-01-2019-MAR-AE_... | |
| test view.bt | |

Red arrows in the image point to the "Send" button in the top right corner and the "test view.bt" attachment in the Attachments section.

Contracting Authority Signature

- ▶ If record is ready to move forward to PC for AG Approval
 - ▶ Choose **Accept**
 - ▶ Click **Send**
- ▶ If record must be returned to the PM for Update:
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Professional Services Agreement AG Approval (PC)



Professional Services Agreement AG Approval (PC)

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

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

Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for AG Approval.

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

Source Name : **Agency General Projects Test**
Record No : **Professional Services Agreements Agree-0019**
Title : **mmw-test new workflow**

[Unifier Login](#)



AG Approval (PC)

- ▶ Click Accept Task to begin working on record

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604156?task_id=2604156&parent_id=0&viewOnly=0&project_j...

Professional Services Agreements Accept Decline

General Agreement Details Purchase Order

Task Details

From: Matthew Weber

To: Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Att...

Sent For: AG Approval

General

| | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | Agree-0024 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | Status |

Attachments Comments Linked Reco

| Name | | | |
|-------------------------------------|-------------------------|--|--|
| Published Attachments | | | |
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... | | |
| <input checked="" type="checkbox"/> | test view.txt | | |

Total: 2



AG Approval (PC)

- a) Review the record details in the General tab
- b) Review the attached documents
- c) When the record is ready to move forward, click **Send**

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604156/undefined/undefined?__uref=uuu/6681709t1`. The page title is "Professional Services Agreements". The "General" tab is selected, showing a form with the following fields:

| | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | Agree-0024 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Accepted |
| Title | Fee Title |
| OCI General 080001-02 | OFCC Standard Fee |
| Selection Method | EDGE Waiver |
| Competitive Selection | |
| | EDGE Goal Percent |
| | 0 |

The "Attachments" section is visible on the right, showing a table of published attachments:

| Name |
|-------------------------|
| C110-01-2019-MAR-AE_... |
| test view.txt |

Annotations: A red bracket labeled 'a' spans the General tab. A blue circle labeled 'b' is over the Attachments tab. A red circle labeled 'c' is over the 'Send' button in the top right corner.

AG Approval (PC)

- ▶ If record is ready to move forward to PM to distribute Notice to Commence Services
 - ▶ Choose **Accept**
 - ▶ Click Send
- ▶ If record must be returned to the PM for Update:
 - ▶ Choose **Return for Clarification**
 - ▶ Click Send

The image displays two screenshots of a web application interface for 'Professional Services Agreements'. The top screenshot shows the 'Workflow Action Details' dialog box with the 'Workflow Actions' dropdown menu open, highlighting the 'Approve' and 'Return for Clarification' options. A red arrow points to the 'Approve' option. The bottom screenshot shows the same dialog box with 'Approve' selected in the dropdown. The 'Send For' field is populated with 'Notice to Commence Service'. The 'To' field is populated with 'Archana Atrey, Matthew Weber, Rita Nichols, Shauna Hooks, Steve Mayo, Project Manager'. The 'CC' field is empty. The 'Due Date Details' section shows 'Task Due Date' is not available. The 'Send' button is highlighted in blue.



Professional Services Agreement Notice to Commence Services (PM)



Professional Services Agreement Notice to Commence Services (PM)

- ▶ Project Manager
Receives Email
- ▶ Click on the “Unifier
Login” button to access
the task

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

Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for Notice to Commence Services.

From : Matthew Weber
Sent For : Notice to Commence Services

Source Name : Agency General Projects Test
Record No : Professional Services Agreements Agree-0019
Title : mmw-test new workflow

[Unifier Login](#)



Notice to Commence Services (PM)

- ▶ Click Accept to begin working on the record

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604200?task_id=2604200&parent_id=0&viewOnly=0&project_id=10...

Professional Services Agreements Accept Decline

General Agreement Details Purchase Order

Task Details

From: Matthew Weber

To: Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project...

Sent For: Notice to Commence Services

General

| | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | Agree-0024 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | Status |

Attachments Comments Linked Records

| Name | Title |
|---|-------|
| Published Attachments | |
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... | |
| <input checked="" type="checkbox"/> test view.bt | |

Total: 2



Notice to Commence Services (PM)

- ▶ Review attached documents, ensure that all signatures have been acquired

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604200/undefined/undefined?__uref=uuu76683709t1

Professional Services Agreements

Send Save

General Agreement Details Purchase Order

Attachments Comments Linked Recor

Published Attachments

| Name | ... | Tit |
|---|-----|-----|
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... | | |
| <input checked="" type="checkbox"/> test view.txt | | |

Total: 2



Document Creation (PM)

Once record is complete:

- a) Click the Menu at the top right of the record
- b) Click **Print**
- c) Select **Custom**

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/open/upsa1/3226/0/0?srcid=3226&model=upsa1&fromcostlog=1&pr...

Professional Services Agreements

Send Save [Menu]

General Agreement Details

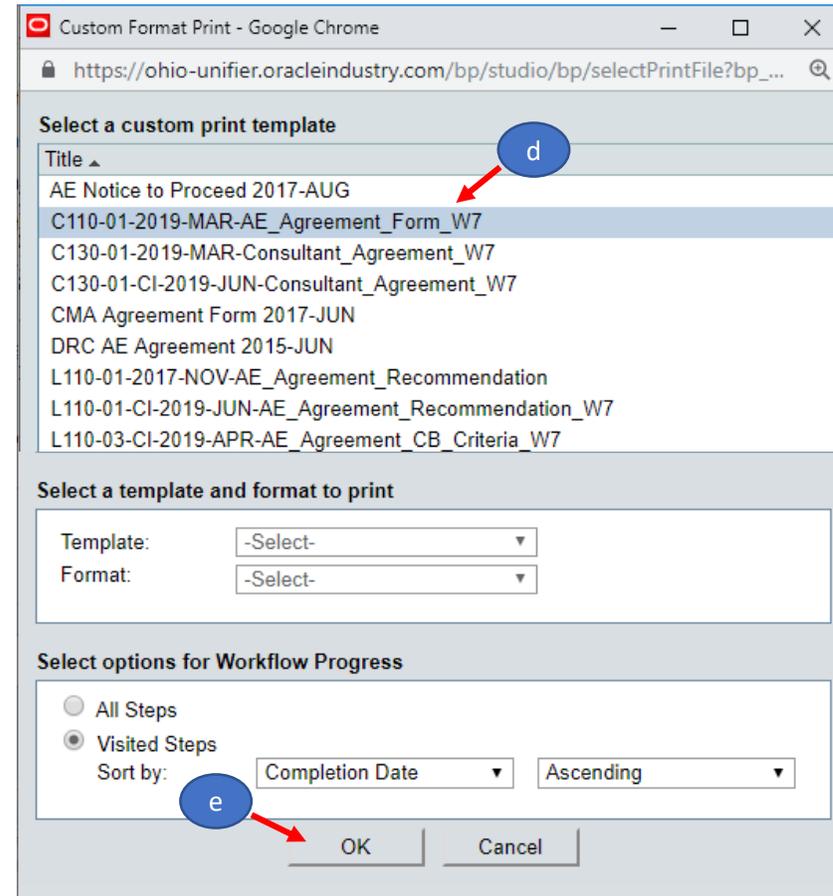
| | |
|------------------------------|-----------------------------|
| General | |
| Organization | Record Number |
| OAKS CI Test | Agree-0024 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Title | Fee Title |
| OCI General 080001-02 | OFCC Standard Fee |

ohio-unifier.oracleindustry.com/bp/mod/bp/.../0...



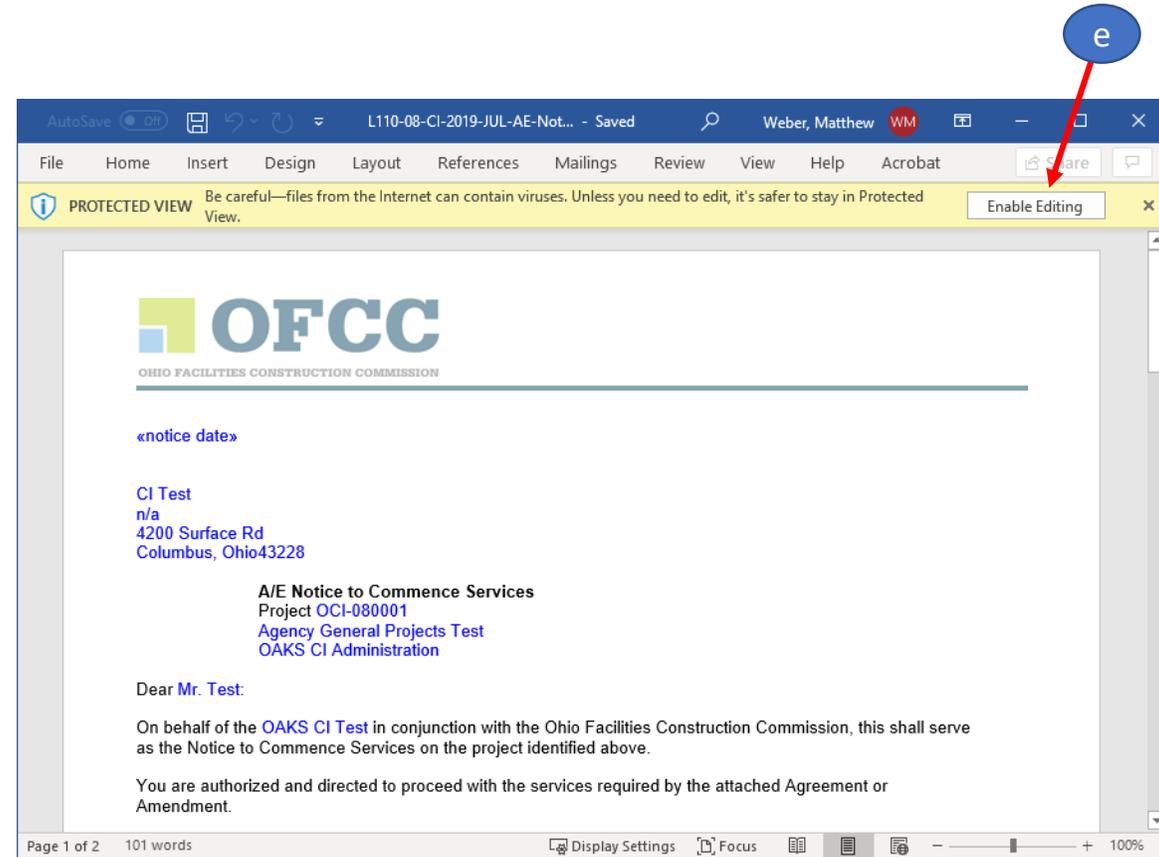
Notice to Commence Services (PM)

- d. Select: **AE Notice to Commence Services**
- e. Click : **OK**



Notice to Commence Services (PM)

- d. Open downloaded form, Click Enable editing
 - ▶ Make updates as necessary
 - ▶ Save Document to computer
 - ▶ Attach Document to Record



Notice to Commence Services (PM)

Upload all documents to [Document Manager](#) prior to attaching documents

- 1) Under the **Attachments** tab on the right side of the record, click the attachments button
- 2) Choose **Document Manager**
- 3) Navigate to the folder where the document is stored; select the document you wish to attach
- 4) Click **Select**

The screenshot displays the 'Professional Services Agreements' interface. The main window shows the 'Attachments' tab with a 'Document Manager...' button highlighted by a red box and a blue circle labeled '2'. A secondary window shows the 'Select Files' dialog with a table of files. The file 'C110-01-2019-MAR-AE_Agreement_F...' is highlighted by a red box and a blue circle labeled '3'. The 'Select' button in the dialog is highlighted by a red box and a blue circle labeled '4'.

| Name | Location | Owner | Title | Revision... | Issue Date | Size |
|-------------------------------------|----------------------|---------------|-------|-------------|------------|--------|
| C110-01-2019-MAR-AE_Agreement_F... | /0000 Concept Dev... | Matthew Weber | | | | 431 KB |
| L110-06-CI-2019-JUL-AE-Notice_to_Co | /0000 Concept Dev... | Matthew Weber | | | | 363 KB |



Notice to Commence Services (PM)

The Document Manager screen will close:

The added attachment(s) will be updated and display under the Attachments tab

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

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604200/undefined/undefined?__uref=uuu76683709t1`. The page title is "Professional Services Agreements". The main content area is divided into two sections: "General" and "Attachments".

The "General" section contains the following fields:

| | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | Agree-0024 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/14/2020 02:55 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Approved |
| Title | Fee Title |
| OCI General 080001-02 | OFCC Standard Fee |
| Selection Method | EDGE Waiver |
| Competitive Selection | |
| | EDGE Goal Percent |
| | 0 |

The "Attachments" section is highlighted with a red box and contains the following table:

| Name | ... | Tit |
|-------------------------------------|-------------------------|-----|
| Published Attachments | | |
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... | |
| <input checked="" type="checkbox"/> | test view.txt | |

The "Send" button is circled in red, and a red arrow points to it from the top right of the page.



Notice to Commence Services (PM)

- ▶ Verify Workflow
- ▶ Use the **CC** field to carbon copy other users in the project
- ▶ Click **Send** to Distribute
- ▶ ***The record will now go to the A/E for Acknowledgement***

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604200/undefined/undefined?__uref=uuu76683709t1

Professional Services Agreement Details

General Agreement Details

Workflow Action Details

Send Save

General

Organization
OAKS CI Test

Project Number
OCI-080001

Project Name
Agency General Projects

Project Location
OAKS CI Administration

Title
OCI General 080001-02

Selection Method
Competitive Selection

Workflow Action Details

Action Details

Workflow Actions *
Distribute

Send For
Acknowledgement

To
Matthew Weber

CC
Start typing for suggestions...

Due Date Details

Task Due Date
04/30/2020 09:48 AM

Cancel Send



Professional Services Agreement Acknowledgement (A/E)



Professional Services Agreement Acknowledgement (A/E)

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

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

Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for Acknowledgement.

| | |
|-----------------|-----------------------------|
| From : | Matthew Weber |
| Sent For : | Acknowledgement |
| Task Due Date : | 02/18/2020 07:12 AM (UTC-8) |

| | |
|---------------|---|
| Source Name : | Agency General Projects Test |
| Record No : | Professional Services Agreements Agree-0019 |
| Title : | mmw-test new workflow |

[Unifier Login](#)



Acknowledgement (A/E)

- ▶ Click Accept to begin working on the record

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604230?task_id=2604230&parent_id=0&viewOnly=0&project_id=1003&model=...

Professional Services Agreements

[Accept](#) [Decline](#) ☰

[General](#) [Agreement Details](#) [Purchase Order](#)

Task Details

From: Matthew Weber

To: Matthew Weber

Sent For: Acknowledgement

Task Due Date: 04/30/2020 09:50 AM (UTC-5)

General

| | |
|--|--|
| Organization: OAKS CI Test | Record Number: Agree-0024 |
| Project Number: OCI-080001 | Creator: Matthew Weber |
| Project Name: Agency General Projects Test | Creation Date: 04/14/2020 02:55 PM (UTC-5) |

Attachments

Published Attachments

| | Name | Title |
|-------------------------------------|-------------------------|-------|
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... | |
| <input checked="" type="checkbox"/> | test view.txt | |

Total: 2



Acknowledgement (A/E)

- ▶ Use the **CC** field to carbon copy other users in the project
- ▶ Click **Send** to Acknowledge
- ***The record will now be at the End of the Professional Services Agreement Process***

Professional Services Agreements - OCI General 080001-02 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2604230/undefined/undefined?__uref=uuu76683709t1

Professional Services Agreement

Workflow Action Details

General Agreement Details Purchases

General

Organization
OAKS CI Test

Project Number
OCI-080001

Project Name
Agency General Projects Test

Project Location
OAKS CI Administration

Title
OCI General 080001-02

Selection Method
Competitive Selection

Action Details

Workflow Actions *
Acknowledge

Send For
End

CC
Start typing for suggestions...

Cancel Send



Subcontractor/Supplier Declaration



Subcontractor/Supplier Declaration

- ▶ Prior to submission of a Professional Services Pay Request that identifies an EDGE Consultant, the Consultant's SMSD record must be created by the A/E and approved in OAKS CI.



Purpose & Procedure

- ▶ The Subcontractor Supplier Declaration Business Process (BP):
 - ▶ Provides for the submittal, review, and approval of the Professional Service Providers EDGE Consultants



Subcontractor/Supplier Declarations

Workflow Steps:



Click the boxes to navigate directly to each section



Create Subcontractor/Supplier Declaration Record (A/E)



Create Subcontractor/Supplier Declaration Record (A/E)

► Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar shows the user ID "uuu600419530". The page header includes a navigation menu with items like "Company Work...", "ACF Fire Protec...", "Academy...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the header. A search bar is located below the header, containing the text "DPS-". A red arrow labeled "b" points to the search bar. Below the search bar is a table with the following data:

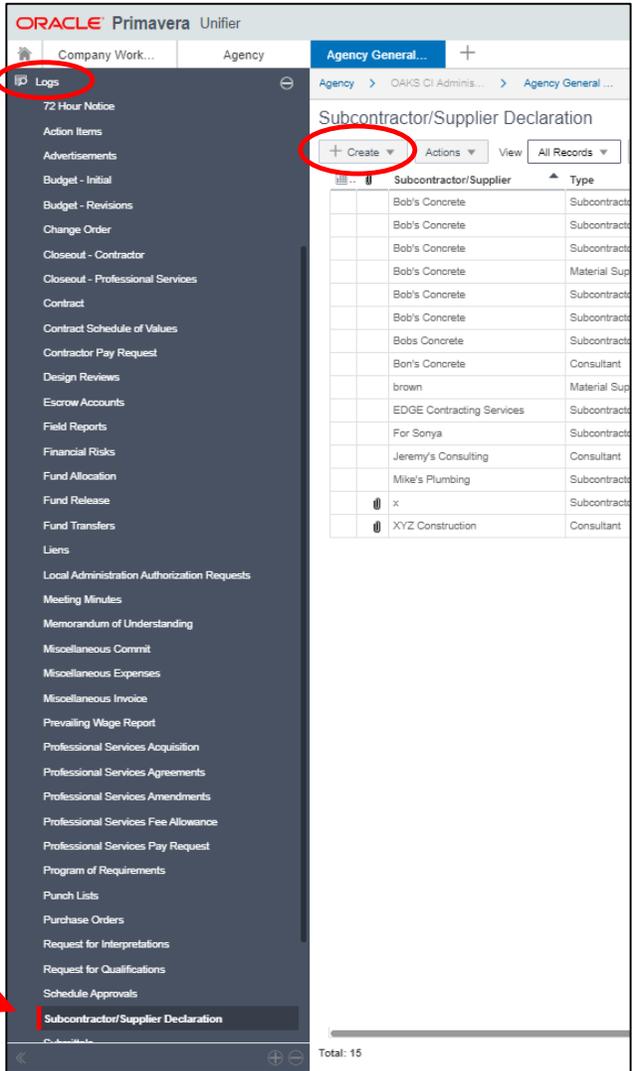
| Name | Number | Location |
|--|---------------|-------------------------------------|
| Ohio State Highway Patrol Post 44 | DPS:080001 | /Agency/Department of Public Safety |
| OSHP Post 23 LEADS Building | DPS:110001 | /Agency/Department of Public Safety |
| ODPS ACF Standing Seam Roof Renovation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

A red arrow labeled "c" points to the first row of the table. Below the table, there is a section titled "General Projects Test" with the text "Agency General Projects" and "s Dollar (USD)". At the bottom of the page, the email address "_prod+1003@oracleindustry.com" is visible.



Create Subcontractor/Supplier Declaration Record (A/E)

- ▶ In OAKS CI navigate to:
 - ▶ Logs -> **Subcontractor/Supplier Declaration**
 - ▶ Click **Create**



Create Subcontractor/Supplier Declaration Record (A/E)

a) Complete the General section

- ▶ The fields marked with a red * are required
- ▶ The **Title** should house the name of the company utilized

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1003/185704?_uref=uuu561762758t1`. The page title is "Create New Subcontractor/Supplier Declaration". The "General" tab is selected, and the "Title" field is highlighted with a red box. The form contains the following fields:

| NOTE: Only select either Contract Name or Professional Services Name | |
|--|--------------------------|
| Organization OAKS CI Test | Record Number |
| Project Number OCI-080001 | Creation Date |
| Project Name Agency General Projects Test | Creator Matthew Weber |
| Project Location OAKS CI Administration | Status |
| Title * Matt's Consulting | Tier 1 Yes |
| Contract Name | Contractor Name |
| Professional Services Agreement Name Type a Title... | |



Create Subcontractor/Supplier Declaration Record (A/E)

b) Scroll down the form to complete the Declaration Information block

b

Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1003/185704?_uref=uuu561762758t1

Create New Subcontractor/Supplier Declaration

Send Save

General

Declaration Information

Type *
Consultant

Subcontractor/Supplier *
Matt's Consulting

Federal Tax ID *
99-9999999

Primary Officer 1 *
Matt Weber

Address Line 1 *
30 W Sprint St

Address Line 2

City *
Columbus

State *
Ohio

ZIP *
43215

Contact Person *
Matt Weber

Phone No. *
6144381044

Fax No. *
N/A

E-mail Address *
matthew.weber@ofcc.ohio.gov

Additional Details

Create Subcontractor/Supplier Declaration Record (A/E)

c) Scroll down the record and fill out the applicable fields in the Additional Details block

- ▶ If EDGE Certified Sub is YES, the EDGE Certification Number must be filled in

d) When the record is ready to move forward, click **Send**

Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1003/185704?_uref=uuu561762758t1

Create New Subcontractor/Supplier Declaration

General

Fax No. *
N/A

E-mail Address *
matthew.weber@ofcc.ohio.gov

Additional Details

Subcontractor/P.O. Date
04/16/2020 05:00 PM (UTC-5)

Subcontractor/P.O. Amount \$
25,000.00

EDGE Certified? *
Yes

EDGE Certification Number
123456789

MBE
Select

Send

Create Subcontractor/Supplier Declaration Record (A/E)

- ▶ Verify Workflow Action - **Submit**
- ▶ Click **Send**

The record will now go to the PM for the Declaration Review Step

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1003/185704?__uref=uuu561762758t1`. The page title is "Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome". A modal dialog titled "Workflow Action Details" is open, showing the following fields:

- Action Details**
 - Workflow Actions ***: Submit
 - Send For**: PM Declaration Review
 - To**: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Manager
 - CC**: Start typing for suggestions...
- Due Date Details**
 - Task Due Date**: (Empty field)

An information icon (i) is displayed above the text "Task Due Date is not available". At the bottom of the dialog are "Cancel" and "Send" buttons.

Subcontractor/Supplier Declaration Record PM Declaration Review



Subcontractor/Supplier Declaration Record PM Declaration Review

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

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

Project/Shell: Agency General Projects Test

Subcontractor/Supplier Declaration SSD-0017 is sent to you for PM Declaration Review.

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

Source Name : **Agency General Projects Test**
Record No : **Subcontractor/Supplier Declaration SSD-0017**
Title : **Matt's Consulting**

[Unifier Login](#)



PM Declaration Review – Accept Task

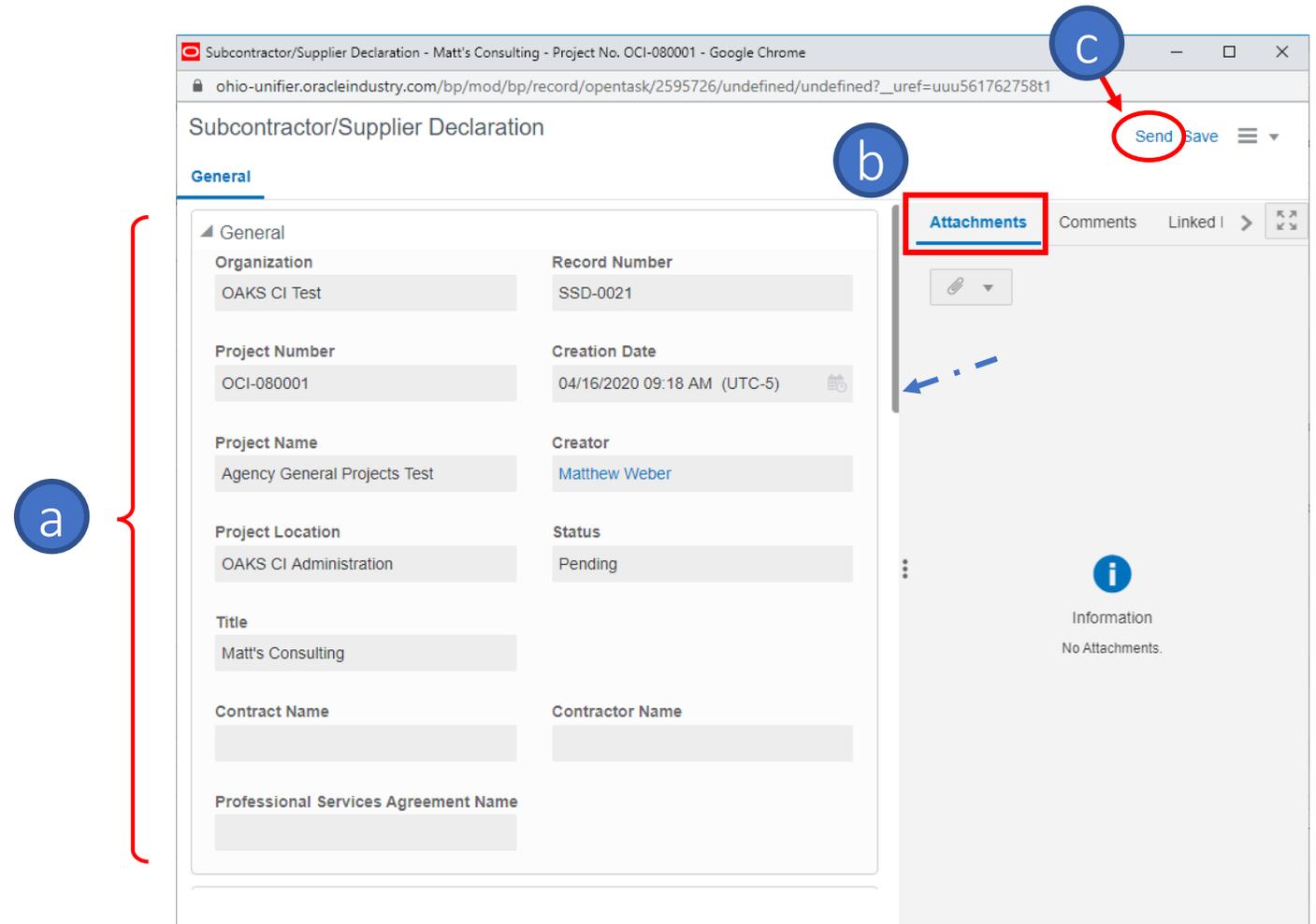
- ▶ Click **Accept Task** to begin work on the record

The screenshot shows a web browser window displaying an Oracle BPM task record. The browser's address bar shows the URL: `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595726?task_id=2595726&parent_id=0&viewOnly=0&project_id=1003&model=usd&...`. The page title is "Subcontractor/Supplier Declaration". In the top right corner, there are two buttons: "Accept" and "Decline". The "Accept" button is circled in red, and a red arrow points to it from the left. Below the buttons is a menu icon. The main content area is divided into two sections. The left section is titled "General" and contains two expandable panels. The first panel, "Task Details", shows the following information: "From" (Matthew Weber), "To" (Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Proje...), and "Sent For" (PM Declaration Review). The second panel, "General", shows the following information: "Organization" (OAKS CI Test), "Record Number" (SSD-0021), "Project Number" (OCI-080001), and "Creation Date" (04/16/2020 09:18 AM (UTC-5)). The right section is titled "Attachments" and shows "No Attachments." with an information icon.



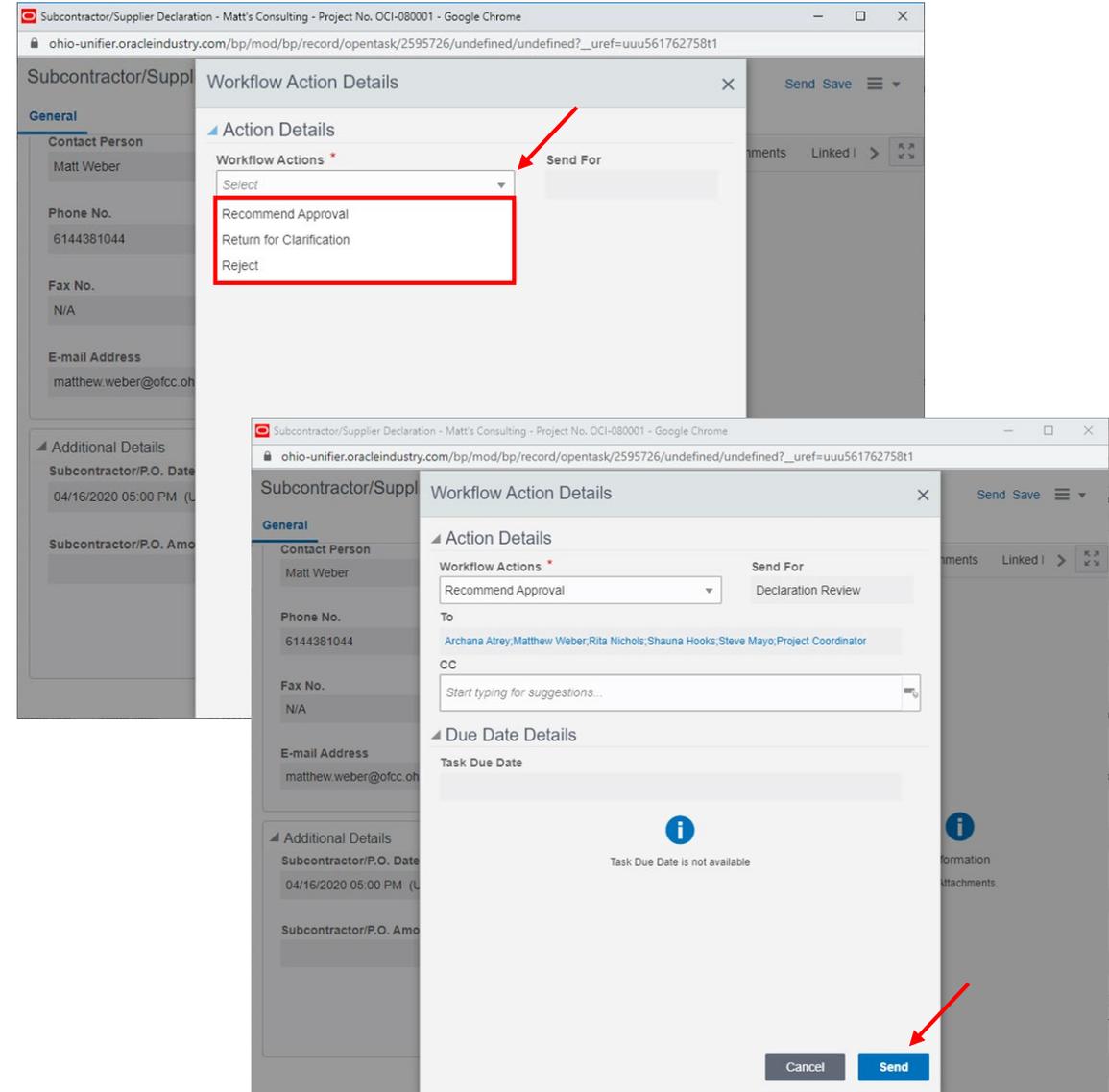
PM Declaration Review

- a) Under the General tab, review information entered in the previous step, scrolling down as necessary
- b) Review any attachments
- c) Once the review is complete and the record is ready to move forward, click **Send**



Send Record

- ▶ Select the Workflow Action
 - ▶ If record is ready to move forward to the Project Coordinator for Declaration Review (Validation):
 - ▶ Choose **Recommend Approval**
 - ▶ Click **Send**
 - ▶ If record must be returned to the Associate for more information:
 - ▶ Add a General Comment. See [Add General Comments](#) section for instructions.
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Subcontractor/Supplier Declaration Review Validation (PC)



Subcontractor/Supplier Declaration Review Validation (PC)

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

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

Project/Shell: Agency General Projects Test

Subcontractor/Supplier Declaration SSD-0017 is sent to you for Declaration Review.

From : Matthew Weber
Sent For : Declaration Review

Source Name : Agency General Projects Test
Record No : Subcontractor/Supplier Declaration SSD-0017
Title : Matt's Consulting

[Unifier Login](#)



Declaration Review Validation (PC) – Accept Task

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

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

- Browser: Google Chrome
- URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595854?task_id=2595854&parent_id=0&viewOnly=0&project_id=1003&model=usd&_uref=uuu561...
- Page Title: Subcontractor/Supplier Declaration
- Buttons: Accept Task (circled in red), Decline, and a menu icon.
- Section: General
- Task Details:
 - From: Matthew Weber
 - To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Coordinator
 - Sent For: Declaration Review
- General Information:

| | | | |
|----------------|------------------------------|---------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | SSD-0021 |
| Project Number | OCI-080001 | Creation Date | 04/16/2020 09:18 AM (UTC-5) |
| Project Name | Agency General Projects Test | Creator | Matthew Weber |
- Attachments: Information icon, No Attachments.



Declaration Review Validation (PC)

- a) PC will review the record, and fill out all required fields in the General section
- b) Scroll down to review and complete all sections in the General section

Subcontractor/Supplier Declaration - Matt's Consulting - Project No. OCI-080001 - Google Chro...

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595854/undefined/undefined?_uref...

Subcontractor/Supplier Declaration Send Save

General

General

| | |
|--|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | SSD-0021 |
| Project Number | Creation Date |
| OCI-080001 | 04/16/2020 09:18 AM (UTC-5) |
| Project Name | Creator |
| Agency General Projects Test | Matthew Weber |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Title | |
| Matt's Consulting | |
| Contract Name | Contractor Name |
| | |
| Professional Services Agreement Name * | |
| mmw-test new workflow | |



Declaration Review Validation (PC)

- c) Once all required fields are completed and the record is ready to move forward, click **Send**
 - ▶ Utilize the links [found here](#) to validate EDGE and DFWP

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595854/undefined/undefined?_uref...`. The page title is "Subcontractor/Supplier Declaration". In the top right corner, there are buttons for "Send" and "Save", with "Send" circled in red. A blue circle with the letter "C" is positioned above the "Send" button, with a red arrow pointing to it. The form is divided into several sections:

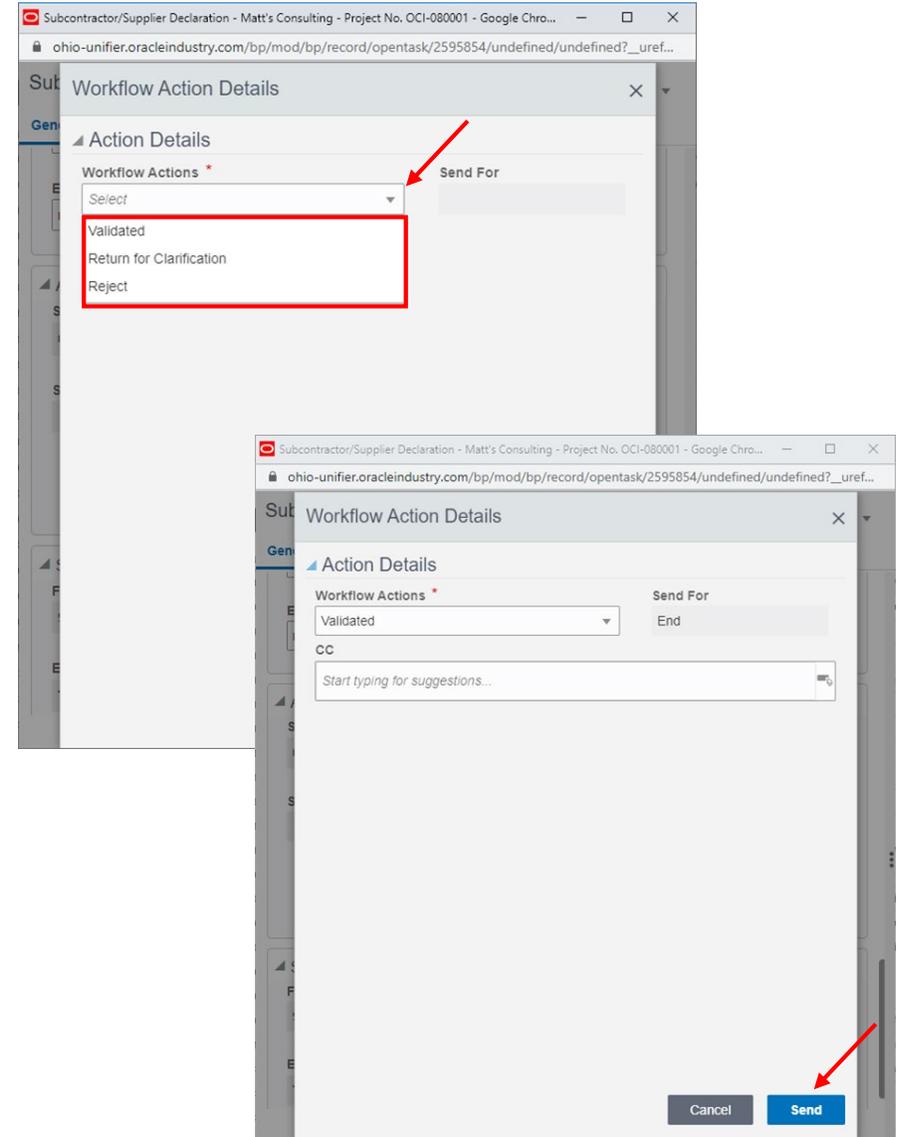
- General**: E-mail Address (matthew.weber@ofcc.ohio.gov)
- Additional Details**: Subcontractor/P.O. Date (04/16/2020 05:00 PM (UTC-5)), EDGE Certified? (Yes), Subcontractor/P.O. Amount \$ (25,000.00), EDGE Certification Number (123456789), MBE (Select)
- Subcontractor Supplier Validation**: Federal Tax ID (99-9999999), EDGE Certified? (Yes), Validated? * (Yes), Validated? * (Yes)

The "Validated?" dropdowns in the "Subcontractor Supplier Validation" section are circled in red.



Send Record

- ▶ Select the Workflow Action
 - ▶ If the record is ready to be validated, completing the process:
 - ▶ Choose **Validated**
 - ▶ Click **Send**
 - ▶ If record must be returned to the Associate for Update :
 - ▶ Add a General Comment
(See [Add General Comments](#) section for instructions)
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Validation Links

Use this link to validate Drug Free Safety Workplace for subcontractors:

- ▶ <https://www.bwc.ohio.gov/employer/services/StateContract/nlbwc/StateContract1.aspx>

Use this link to validate EDGE for subcontractors and material suppliers:

- ▶ <http://eodreporting.oit.ohio.gov/searchEODReporting.aspx>



Professional Services Pay Request



Purpose & Procedure

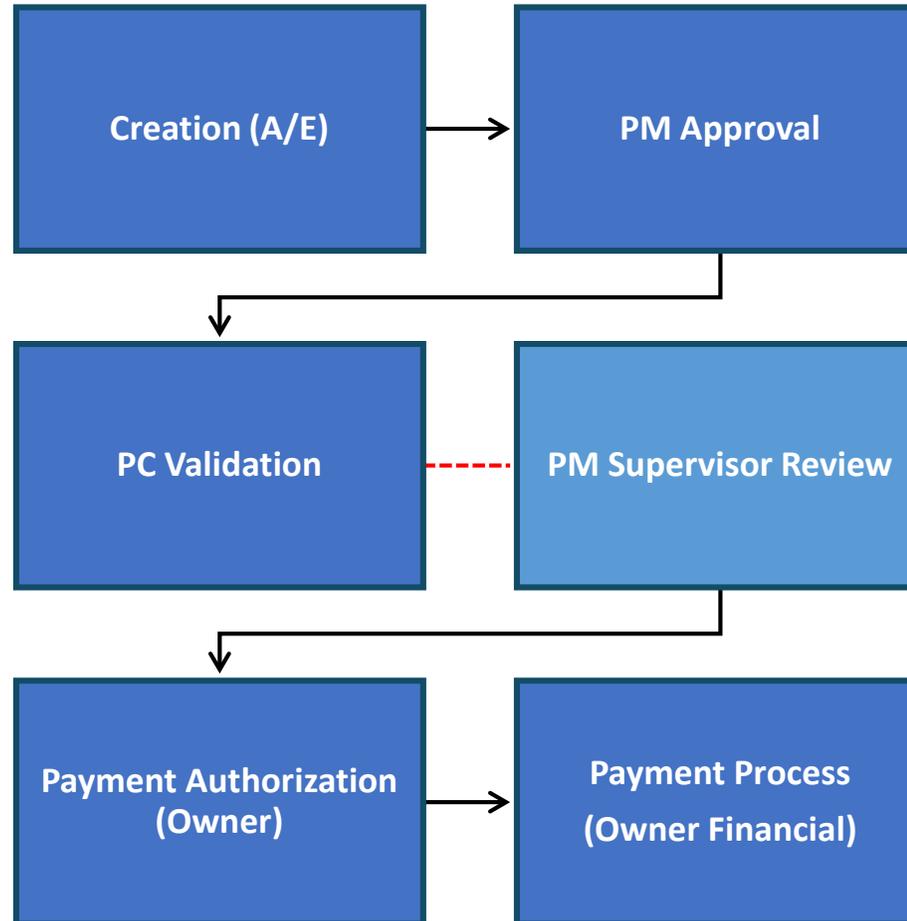
- ▶ Provides for the submission, review, and approval of interim or final payment requests for services completed by the provider
- ▶ References and relates directly to the schedule of values (SOV) line item amounts as outlined in the Professional Service Provider's Agreement



Professional Services Pay Request

▶ Workflow Steps

- * PM Supervisor Review step only occurs when this pay request represents Final Payment. Otherwise Continue to the Payment Authorization step.



Click the boxes to navigate directly to each section



Subcontractor/Supplier Declaration Review Validation (PC)

Professional Services Pay Request Creation (A/E)

▶ Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar shows the user ID "uuu600419530". The application header includes several tabs: "Company Work...", "ACF Fire Protec...", "OSHP Academy...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights the "Agency General..." tab, and a red plus sign is visible next to it. Below the tabs, a search bar contains the text "DPS". A dropdown menu is open, displaying a list of projects with columns for Name, Number, and Location. A red arrow points from the search bar to the first project in the list. A red plus sign is visible in the top right corner of the application.

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



Professional Services Pay Request – Create (A/E)

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

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with 'Logs' circled in red. A red arrow points to 'Professional Services Pay Request' in the menu. The main content area shows the 'Professional Services Pay Request' page with a '+ Create' button circled in red. Below the menu is a table with columns 'Title' and 'Agreement Name'.

| Title | Agreement Name |
|-------------------------|-----------------|
| Tuesday Test | CI Agreement |
| Test vendor name change | Test Agreement |
| Test PS Pay Request | CI Agreement |
| test 8 | CI Agreement |
| test | Agreement w int |
| test | Agreement #3 |
| Test | Agreement #3 |
| pr#3 | test#2 |
| PR#2 | test#2 |
| PR #4 | Agreement w int |
| PR #1 | test#2 |
| Migration 1 | Migration 2 |

Professional Services Pay Request – Create (A/E)

a) Enter the required * fields in the General section

- ▶ Enter the Title
- ▶ Select Contract Reference
- ▶ Select Period From and Period To

a

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?_uref=uuu184516673t1

Create New Professional Services Pay Request

Send Save

General Pay Request Details

General

Organization
OAKS CI Test

Record Number

Project Number
OCI-080001

Creator
Matthew Weber

Project Name
Agency General Projects Test

Creation Date

Project Location
OAKS CI Administration

Status

Title *
Matt's Consulting OCI-00081_PR1

Internal Ref. Number

Contract Reference *
mmw-test new workflow

Professional Services Provider
OCI Test General

Agreement Type
Design

EDGE Certified?
No

Other Description

Received Date

Period From *
04/01/2020 05:00 PM (UTC-5)

Period To *
04/30/2020 05:00 PM (UTC-5)

Payment Requested

Final Payment? *
Select

Amount (\$) *
0.00

Invoices for Reimbursable Exp. Attached? *
Select

Line Item Total (\$)
0.00

Difference (\$)
0.00

Professional Services Pay Request – Create (A/E)

- b) Enter the required * fields in the Payment Requested section
- ▶ Final Payment
 - ▶ Select Yes if this is the final pay request for this agreement
 - ▶ Invoices for Reimbursable Exp. Attached?
 - ▶ Select Yes if invoices are attached
 - ▶ Amount (\$)
 - ▶ Enter the amount of the current payment request

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?_uref=uuu184516673t1

Create New Professional Services Pay Request

Send Save

General Pay Request Details

General

Organization: OAKS CI Test
Record Number: [Empty]
Project Number: OCI-080001
Creator: Matthew Weber
Project Name: Agency General Projects Test
Creation Date: [Empty]
Project Location: OAKS CI Administration
Status: [Empty]
Title *: Matt's Consulting OCI-00081_PR1
Internal Ref. Number: [Empty]
Contract Reference *: mmw-test new workflow
Professional Services Provider: OCI Test General
Agreement Type: Design
EDGE Certified?: No
Other Description: [Empty]
Received Date: [Empty]
Period From *: 04/01/2020 05:00 PM (UTC-5)
Period To *: 04/30/2020 05:00 PM (UTC-5)

Payment Requested

Final Payment? *: No
Amount (\$) *: 25,000.00
Invoices for Reimbursable Exp. Attached? *: No
Line Item Total (\$) : 0.00
Difference (\$) : 25,000.00

Professional Services Pay Request – Create (A/E)

- ▶ Prior to adding lines to your pay request, you may want to view the remaining balance on your SOV (Schedule of Values)
 - ▶ Click the Menu at the top right of the record and select **SOV**

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?__uref=uuu184516673t1

Create New Professional Services Pay Request

Send Save 

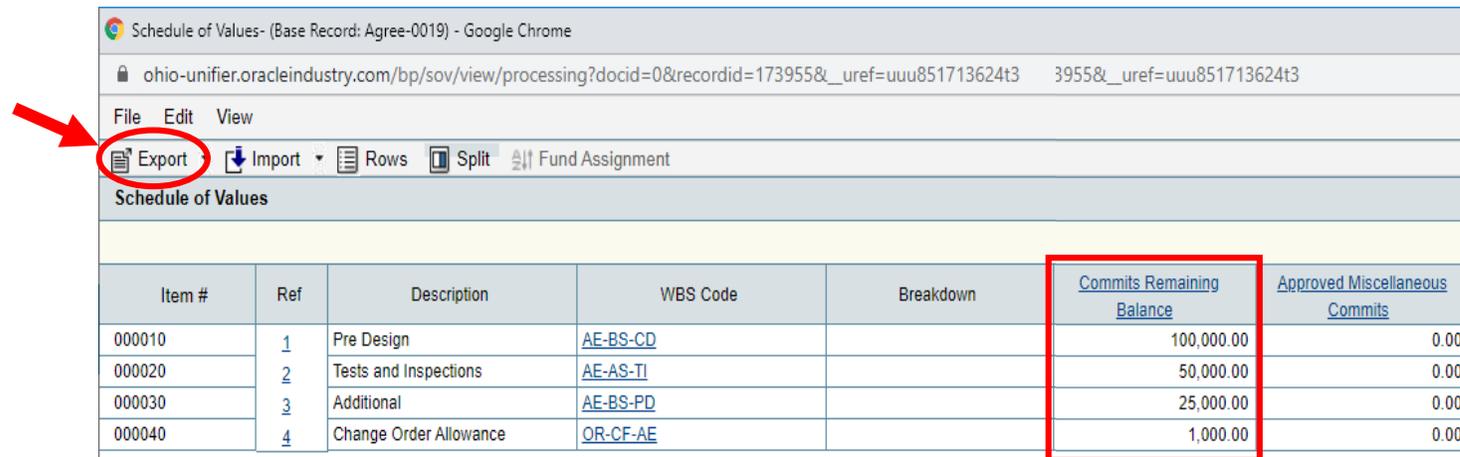
General Pay Request Details

General

| | |
|---------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | |
| Project Location | Status |
| OAKS CI Administration | |
| Title * | Internal Ref. Number |
| Matt's Consulting OCI-00081_PR1 | |
| Contract Reference * | Professional Services Provider |
| mmw-test new workflow | OCI Test General |
| Agreement Type | EDGE Certified? |
| Design | No |
| Other Description | Received Date |
| | |

Professional Services Pay Request – Create (A/E)

- ▶ This allows you to look at the Scheduled Value and Commits Remaining Balance for each of the line items on your SOV (you may need to scroll to the right to find the column)
- ▶ You can also export the SOV to Excel by clicking Export and choosing the Summary Schedule of Values Sheet



Screenshot of a web browser showing a Schedule of Values table. The browser title is "Schedule of Values- (Base Record: Agree-0019) - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=173955&_uref=uuu851713624t3 3955&_uref=uuu851713624t3". The browser menu bar shows "File Edit View". The toolbar includes "Export", "Import", "Rows", "Split", and "Fund Assignment". The "Export" button is circled in red, with a red arrow pointing to it. Below the toolbar is the "Schedule of Values" table. The table has columns: "Item #", "Ref", "Description", "WBS Code", "Breakdown", "Commits Remaining Balance", and "Approved Miscellaneous Commits". The "Commits Remaining Balance" and "Approved Miscellaneous Commits" columns are highlighted with a red box.

| Item # | Ref | Description | WBS Code | Breakdown | Commits Remaining Balance | Approved Miscellaneous Commits |
|--------|-----|------------------------|--------------------------|-----------|---------------------------|--------------------------------|
| 000010 | 1 | Pre Design | AE-BS-CD | | 100,000.00 | 0.00 |
| 000020 | 2 | Tests and Inspections | AE-AS-TI | | 50,000.00 | 0.00 |
| 000030 | 3 | Additional | AE-BS-PD | | 25,000.00 | 0.00 |
| 000040 | 4 | Change Order Allowance | OR-CF-AE | | 1,000.00 | 0.00 |

Professional Services Pay Request – Create (A/E)

- ▶ This is how your SOV will look in Excel
- ▶ **Note:** This file is for reference only. It cannot be re-imported into OAKS CI.

Column: All

Note: This file is for reference only. The contents of this file cannot be modified and re-imported into the Schedule of Value Sheet.

| Ref | Description | WBS Code Breakdown | Pending | Pending | Approved Professional | Approved Amended | Total | Approved Pending | Commits Remaining |
|-----|------------------------|--------------------|---------|---------|-----------------------|------------------|------------|------------------|-------------------|
| 1 | Pre Design | AE-BS-CD | 0 | 0 | 100,000.00 | 0 | 100,000.00 | 0 | 100,000.00 |
| 2 | Tests and Inspections | AE-AS-TI | 0 | 0 | 50,000.00 | 0 | 50,000.00 | 0 | 50,000.00 |
| 3 | Additional | AE-BS-PD | 0 | 0 | 25,000.00 | 0 | 25,000.00 | 0 | 25,000.00 |
| 4 | Change Order Allowance | OR-CF-AE | 0 | 0 | 1,000.00 | 0 | 1,000.00 | 0 | 1,000.00 |

Professional Services Pay Request – Create (A/E)

- ▶ Enter a line item corresponding to each item on the Schedule of Values (SOV) from the agreement for which payment is requested

- Open the Pay Request Details tab
- Click the Add button



Professional Services Pay Request – Create (A/E)

- c) Click on the arrow next to WBS Code
- d) Choose the appropriate line item
- e) Enter a Short Description and the Amount
- f) To add additional lines, click **Save & Add New**, otherwise click **Save**

The screenshot shows the 'Create New Professional Services Pay Request' form in Oracle. The 'Line Item Details' section is active, showing the 'WBS Code' dropdown set to 'AE-BS-CD' (annotated with 'c'). The 'Short Description' field contains 'Services' (annotated with 'e') and the 'Amount (\$)' field contains '10,000.00' (annotated with 'e'). The 'SOV Picker' window is open, showing a table of line items with 'Pre Design' selected (annotated with 'd'). The 'Save & Add New' button is highlighted at the bottom (annotated with 'f').

| Item # | Ref | Description | CBS Code |
|--------|-----|------------------------|----------|
| 000010 | 1 | Pre Design | AE-BS-CD |
| 000020 | 2 | Tests and Inspections | AE-AS-TI |
| 000030 | 3 | Additional | AE-BS-PD |
| 000040 | 4 | Change Order Allowance | OR-CF-AE |
| 000050 | 5 | Additional Services | AE-AS-BE |

Professional Services Pay Request – Create (A/E)

- g) Once all lines have been added, the Line Item information will display
- h) Note the Total Amount field at the bottom of the record

The screenshot displays the 'Create New Professional Services Pay Request' web application. The browser title is 'Create New Professional Services Pay Request - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifior.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?_uref=uuu184516673t1'. The page title is 'Create New Professional Services Pay Request'. The 'General' tab is selected, and the 'Pay Request Details' sub-tab is active. The 'Line Item Details' panel is open on the right. The table below shows three line items:

| No. | WBS Code | Code Name | Short Description |
|-----|----------|-------------------------------|---------------------|
| 003 | AE-AS-BE | AE Additional Services Bu... | Additional Services |
| 002 | AE-AS-TI | AE Tests and Inspections | Inspections |
| 001 | AE-BS-CD | AE Construction Docs Services | Services |

At the bottom of the record, the 'Total Amount' field is displayed as '25,000.00'. The 'Total: 3' label is also visible.

Professional Services Pay Request – Create (A/E)

- ▶ Open the General tab and scroll down to the Payment Requested Section
- ▶ Ensure that the Total Amount displayed from the Pay Request Details tab equals the Amount entered in the Payment Requested section, and the Difference equals \$0.00

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1003/279?_uref=uuu184516673t1

Create New Professional Services Pay Request

Send Save

General Pay Request Details

General

Payment Requested

Final Payment? *
No

Amount (\$) *
25,000.00

Invoices for Reimbursable Exp. Attached? *
No

Line Item Total (\$)
25,000.00

Difference (\$)
0.00

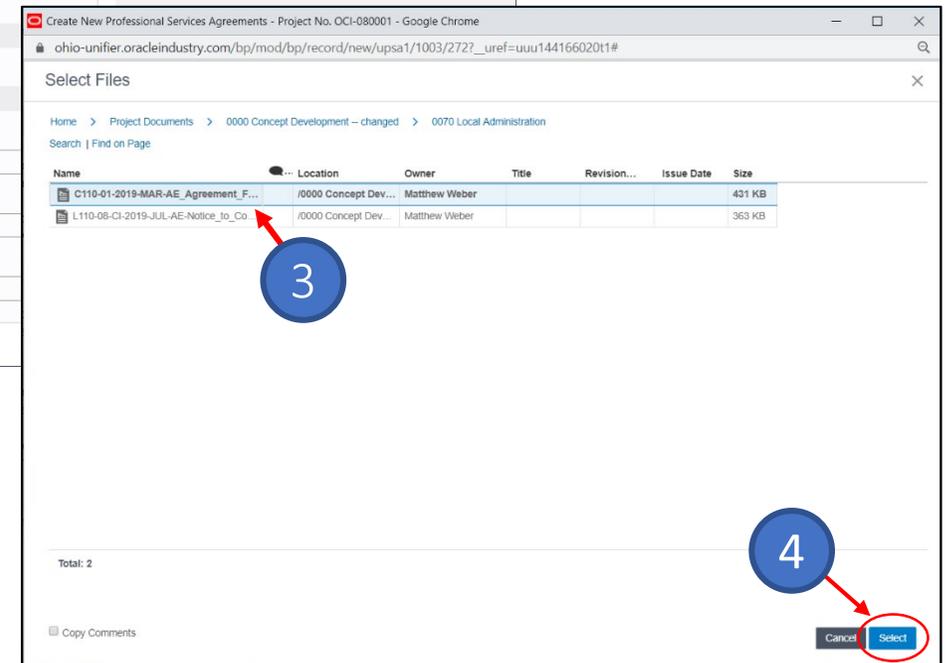
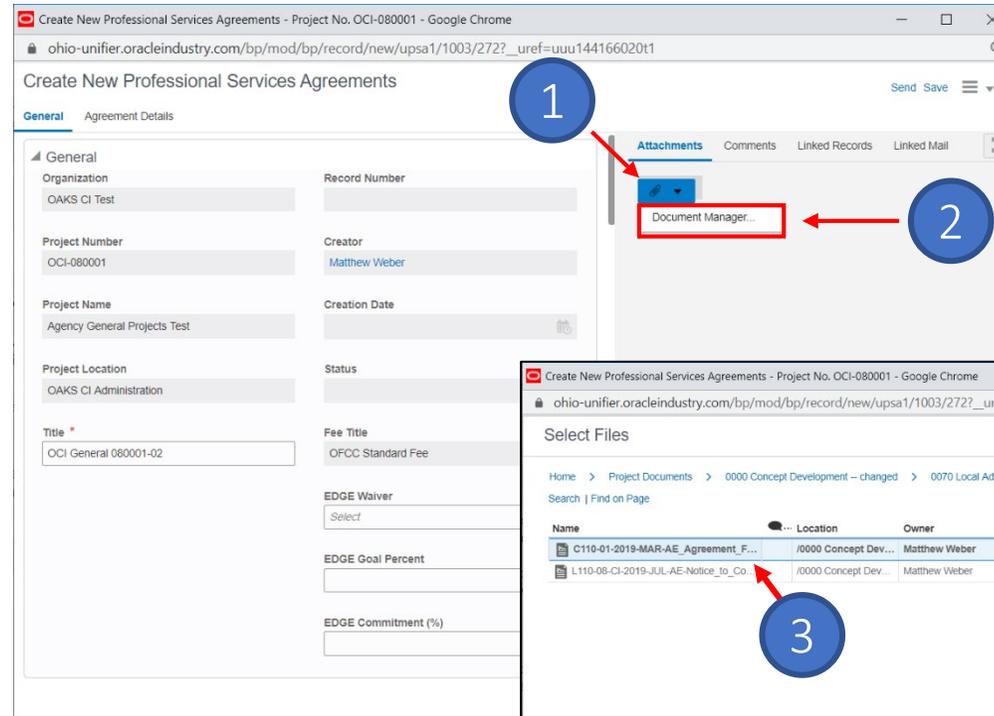
Attachments

Information
No Attachments

Professional Services Pay Request – Attach Supporting Documentation

Upload all documents to [Document Manager](#) prior to attaching documents

- 1) Under the **Attachments** tab on the right side of the record, click the attachments button
- 2) Choose **Document Manager**
- 3) Navigate to the folder where the document is stored; select the document you wish to attach
- 4) Click **Select**



Professional Services Pay Request – Create (A/E)

The Document Manager screen will close:

The added attachment(s) will be updated and display under the Attachments tab

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

The screenshot shows a web browser window titled "Create New Professional Services Pay Request - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/312376/1?_uref=uuu418648075t1#". The page title is "Create New Professional Services Pay Request". There are "Send" and "Save" buttons, with a red arrow pointing to "Send". The "General" tab is selected, showing fields for Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Title (Matt's Consulting OCI-00081_PI), and Contract Reference (mmw-test new wor...). The "Attachments" tab is also visible, showing a list of published attachments, with one attachment "C110-01-2019-MAR-AE..." highlighted by a red box.

Professional Services Pay Request – Create (A/E)

- ▶ Verify Workflow Action
- ▶ Click **Send**
- ▶ The record will now go to PM Approval

The screenshot shows a web browser window titled "Create New Professional Services Pay Request - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/312376/1?_uref=uuu418648075t1#". The main form is titled "Create New P" and has a "General" tab selected. A "Workflow Action Details" dialog box is open, showing the following fields:

- Action Details**
 - Workflow Actions *: **Submit** (highlighted with a red box)
 - Send For: PM Approval
 - To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Manager
 - CC: Start typing for suggestions...
- Due Date Details**
 - Task Due Date: [Empty field]

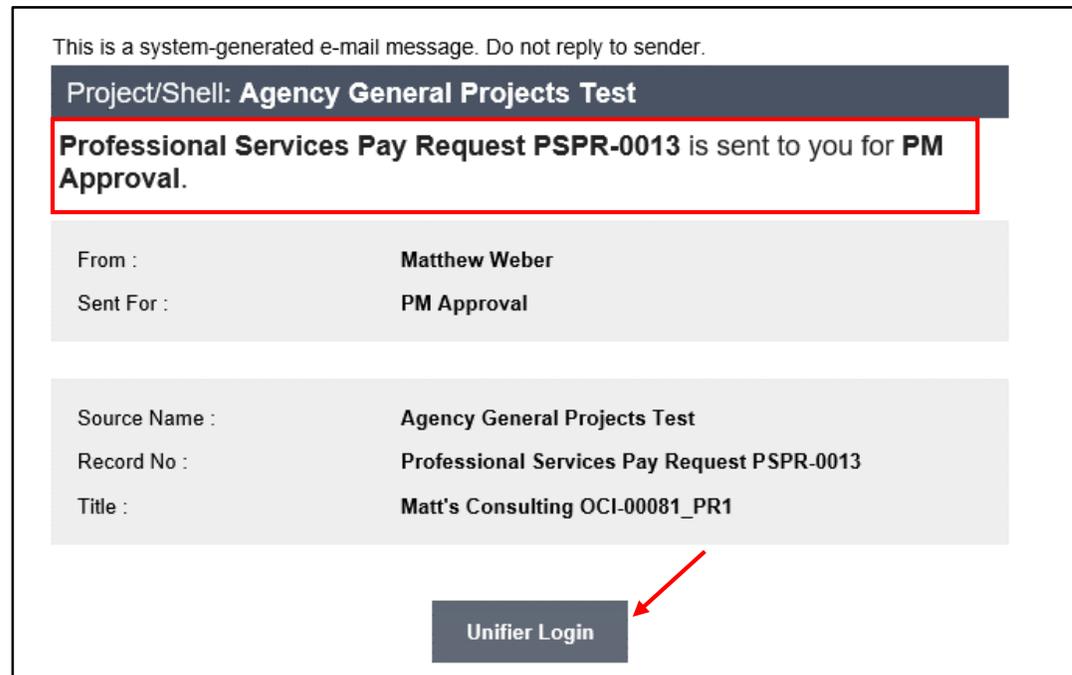
An information icon (i) is displayed with the message "Task Due Date is not available". At the bottom right of the dialog, there are two buttons: "Cancel" and "Send". A red arrow points to the "Send" button.

Professional Services Pay Request PM Approval



Professional Services Pay Request PM Approval

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



PM Approval

- ▶ Click Accept to begin work on the task

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606573?task_id=2606573&parent_id=0&viewOnly=0&project_id=1003&model=ups...

Professional Services Pay Request

Accept Decline

General Pay Request Details Added Purchase Orders Voucher

Task Details

From: Matthew Weber

To: Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Manager

Sent For: PM Approval

General

| | |
|--|--|
| Organization: OAKS CI Test | Record Number: PSPR-0015 |
| Project Number: OCI-080001 | Creator: Matthew Weber |
| Project Name: Agency General Projects Test | Creation Date: 04/27/2020 08:46 AM (UTC-5) |
| Project Location: OAKS CI Administration | Status: Pending |

Attachments

| Name | Title |
|------------------------|-------|
| C110-01-2019-MAR-AE... | |

Total: 1



PM Approval

- a) Review the information in the General tab
- b) Scroll down to the Payment Requested block

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606573/undefined/undefined?__uref=uuu62430746...

Professional Services Pay Request

Send Save

General Pay Request Details

General

| | | | |
|--------------------|--------------------------------------|--------------------------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | PSPR-0015 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/27/2020 08:46 AM (UTC-5) |
| Project Location | OAKS CI Administration | Status | Pending |
| Title | Matt's Consulting Inc. OCI-00081_PR1 | Internal Ref. Number | |
| Contract Reference | OCI General 080001-02 | Professional Services Provider | OCI Test General |
| Agreement Type | Design | EDGE Certified? | No |
| Other Description | | Received Date | 04/27/2020 08:46 AM (UTC-5) |
| Period From | 04/01/2020 05:00 PM (UTC-5) | Period To | 04/30/2020 05:00 PM (UTC-5) |



PM Approval

- c) Review the pay request to determine if it accurately reflects work completed to date. Review invoice for any reimbursables.
- d) When the record is ready to move forward, click the **Send** button

C

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/...`. The page title is "Professional Services Pay Request". In the top right corner, there are buttons for "Send" (circled in red) and "Save". A blue circle with the letter "d" is positioned above the "Send" button, with a red arrow pointing to it. Below the header, there are tabs for "General" and "Pay Request Details". The "General" tab is active, showing a form with the following fields:

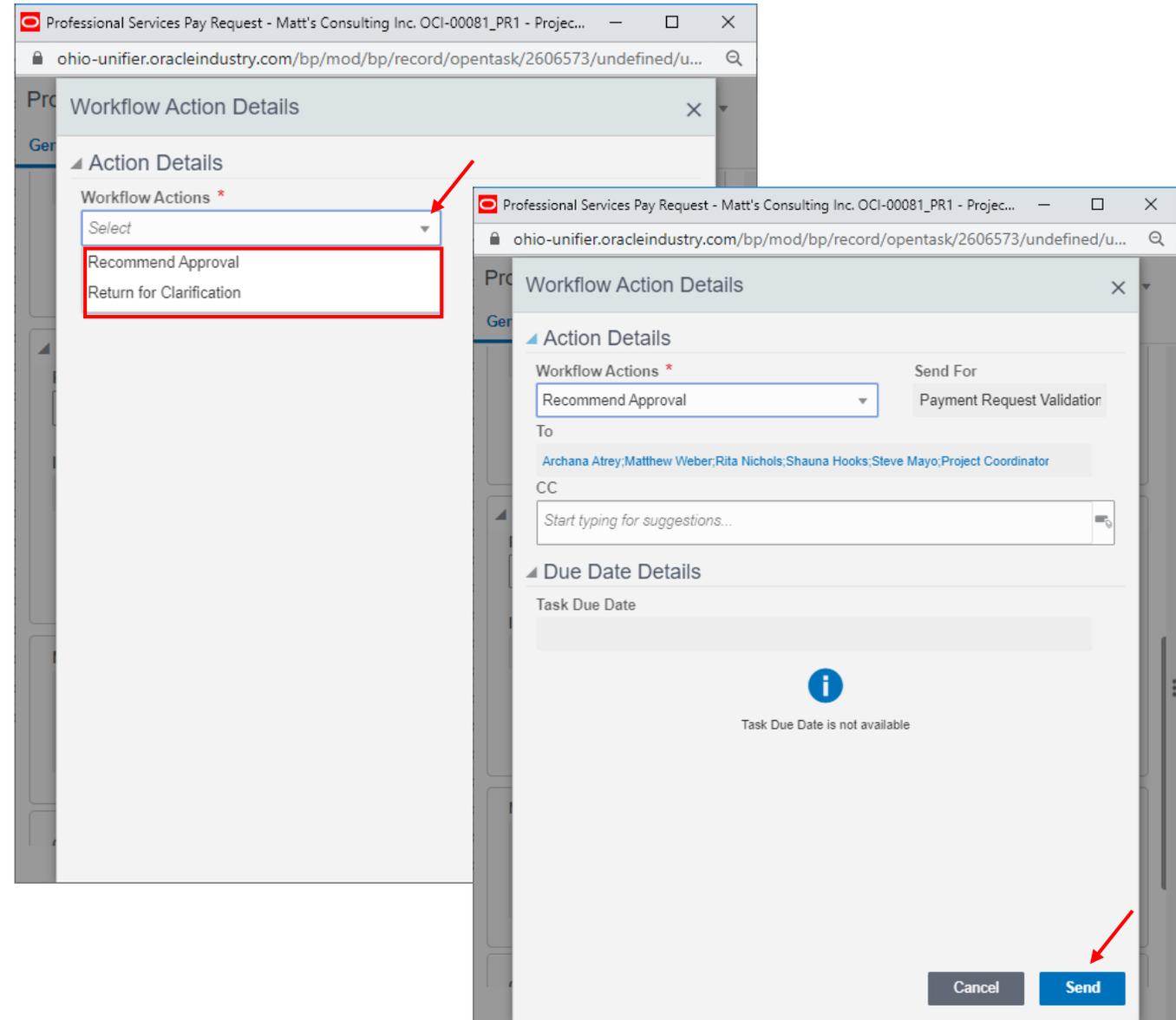
| | |
|---|-----------------------------|
| 04/01/2020 05:00 PM (UTC-5) | 04/30/2020 05:00 PM (UTC-5) |
| PM Approval Date | |
| | |
| Payment Requested | |
| Final Payment? | Amount (\$) |
| No | 25,000.00 |
| Invoices for Reimbursable Exp. Attached? | Line Item Total (\$) |
| No | 25,000.00 |
| Difference (\$) | |
| 0.00 | |
| Notes | |
| Pre-Design - Schematic Design - Document Design | |

A blue circle with the letter "C" is positioned to the left of the "Payment Requested" section, with a red bracket pointing to it.



PM Approval

- ▶ If the record is ready to move forward to PC Validation:
 - ▶ Choose **Recommend Approval**
 - ▶ Click **Send**
- ▶ If record must be returned to the Associate for Update :
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Professional Services Pay Request Validation (PC)



Professional Services Pay Request Validation (PC)

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

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

Project/Shell: Agency General Projects Test

Professional Services Pay Request PSPR-0013 is sent to you for Payment Request Validation.

From : **Matthew Weber**
Sent For : **Payment Request Validation**

Source Name : **Agency General Projects Test**
Record No : **Professional Services Pay Request PSPR-0013**
Title : **Matt's Consulting OCI-00081_PR1**

[Unifier Login](#)



PC Validation

- ▶ Click Accept Task

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606606?task_id=2606606&parent_id=0&viewOnly=0&pro...

Professional Services Pay Request

Accept Decline

General Pay Request Details Added Purchase Orders Voucher

Task Details

From: Matthew Weber

To: Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;...

Sent For: Payment Request Validation

General

| | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | PSPR-0015 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/27/2020 08:46 AM (UTC-5) |
| Project Location | Status |

Attachments

| Name |
|-------------------------|
| C110-01-2019-MAR-AE_... |

Total: 1



PC Validation

- ▶ Review the pay request General section and attached documents
- ▶ Scroll down to the Vendor section of the General tab

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606606/undefined/undefined?__uref=uuu624307465t1

Professional Services Pay Request

Send Save

General Pay Request Details Added Purchase Orders

General

| | |
|-----------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | PSPR-0015 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/27/2020 08:46 AM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Title | Internal Ref. Number |
| Matt's Consulting Inc. OCI-00081_ | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |
| Design | No |
| Other Description | Received Date |
| | 04/27/2020 08:46 AM (UTC-5) |
| Period From | Period To |
| 04/01/2020 05:00 PM (UTC-5) | 04/30/2020 05:00 PM (UTC-5) |

Attachments Comments Linked Re

Published Attachments

| | |
|-------------------------------------|-------------------------|
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... |
|-------------------------------------|-------------------------|

Total: 1

PC Validation

- a) Click the button in the Vendor field to expand and see a list of vendors
- b) Select a Vendor
- c) Click the **Select** button

The image shows two browser windows from the Oracle Pay Request system. The top window displays the 'Professional Services Pay Request' form with the 'Vendor' field highlighted by a red arrow and a blue circle labeled 'a'. The bottom window shows the 'Project Vendors' pop-up window with a red arrow and a blue circle labeled 'b' pointing to the search bar. At the bottom of the pop-up window, a red arrow and a blue circle labeled 'c' point to the 'Select' button.

| OAKS Business Unit | Vendor Name | OAKS Ven... | Local Ven... | City | Status | Record Nu... |
|--------------------|-------------------------------------|-------------|--------------|-----------------|--------|--------------|
| SFC01 | ENC Type Encumbrances | ENC | | Columbus | Active | PV-0005 |
| SOC01 | Fanning/Howey Associations, Inc. | | | Dublin | Active | PV-0004 |
| OCI01 | OCI Migration Inc | | | Columbus | Active | PV-0002 |
| OCI01 | OCI Test General | 0000079990 | 12 | Columbus | Active | PV-0001 |
| SFC01 | Ohio Facilities Construction Com... | SFC01 | | Columbus | Active | PV-0006 |
| YSU01 | Zenith Systems, LLC | 009999 | 09008080 | Bedford Heights | Active | PV-0003 |

PC Validation

- ▶ The Vendor address information will be auto-populated
- ▶ When the record is ready to move forward, click the **Send** button

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606606/undefined/undefined?__uref=uuu624307465t1

Professional Services Pay Request

Send Save

General Pay Request Details Added Purchase Orders

Period From 04/01/2020 05:00 PM (UTC-5) Period To 04/30/2020 05:00 PM (UTC-5)

Vendor *
OCI Test General

Address Line 1
4200 Surface Rd

Address Line 2

City
Columbus

State
Ohio

ZIP
43228

Payment Requested

Final Payment? No Amount (\$) 25,000.00

Invoices for Reimbursable Exp. Attached? No Line Item Total (\$) 25,000.00

Attachments Comments Linked Re

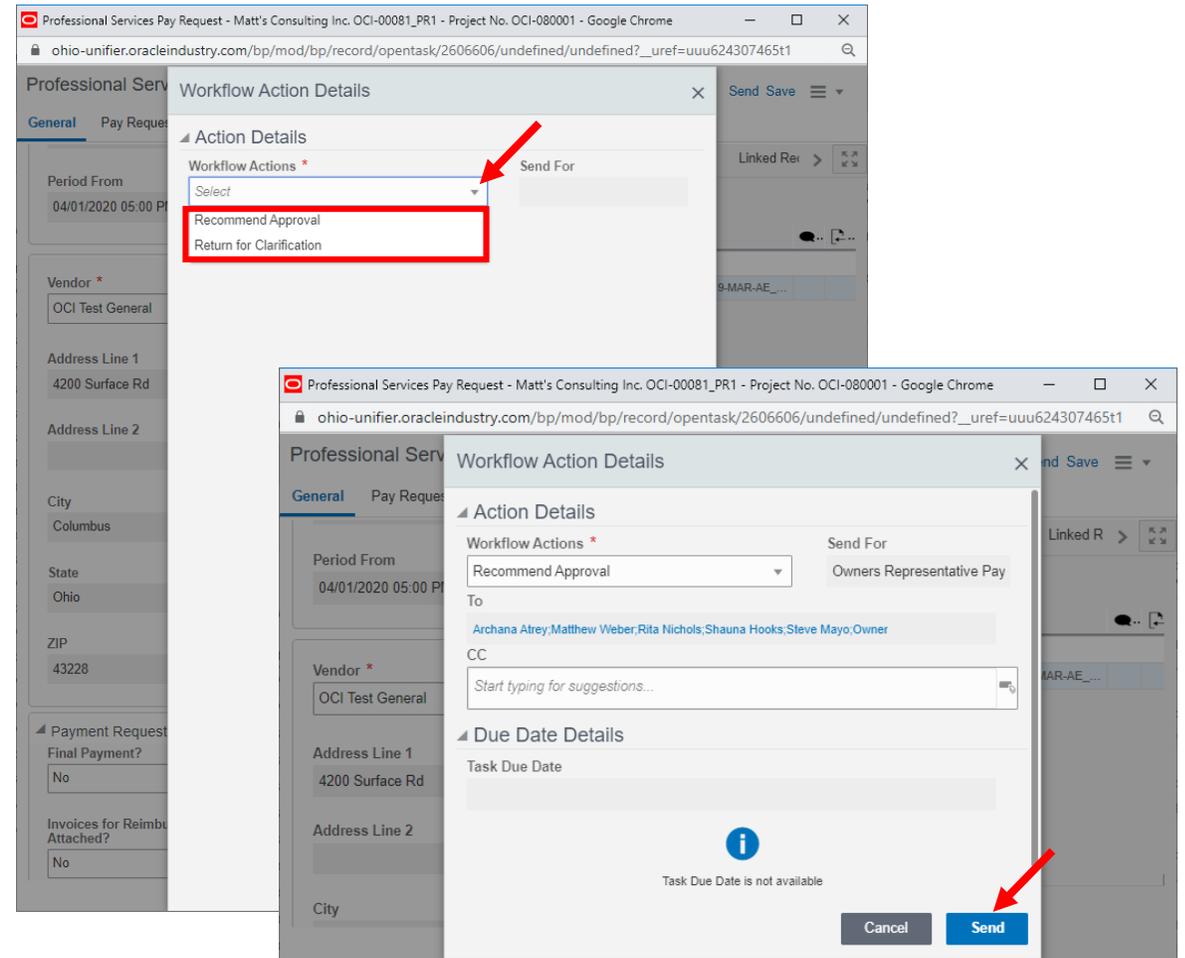
Published Attachments

C110-01-2019-MAR-AE...

Total: 1

PC Validation

- ▶ Select the appropriate Workflow Action
 - ▶ Select Workflow Action: **Recommend Approval**
 - ▶ If **Final Payment: No** is selected, the workflow action will move the record to the [Owner for Payment Authorization](#).
 - ▶ If **Final Payment: Yes** is selected, the workflow action will move the record to [PM Supervisor Review](#).
 - ▶ Select Workflow Action: **Return for Clarification** will send it back to the PM Approval step, where the record can be updated
- ▶ Click **Send**



Professional Services Pay Request PM Supervisor Review (Final Payment)



Professional Services Pay Request PM Supervisor Review (Final Payment)

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

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

Project/Shell: Agency General Projects Test

Professional Services Pay Request PSPR-0014 is sent to you for PM Supervisor Approval.

From : Matthew Weber
Sent For : PM Supervisor Approval

Source Name : Agency General Projects Test
Record No : Professional Services Pay Request PSPR-0014
Title : Matt's Consulting OCI-00081_PR2

[Unifier Login](#)



Professional Services Pay Request PM Supervisor Review (Final Payment)

- ▶ Click Accept Task

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606678?task_id=2606678&parent_id=0&viewOnly=0&...

Professional Services Pay Request

[Accept](#) [Decline](#)

General Pay Request Details Added Purchase Orders Voucher

Task Details

From: Matthew Weber

To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve May...

Sent For: PM Supervisor Approval

General

| | |
|------------------------------|----------------------------|
| Organization | Record Number |
| OAKS CI Test | PSPR-0015 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/27/2020 08:46 AM (UTC-) |

Attachments

Published Attachments

| | |
|-------------------------------------|------------------------|
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE... |
|-------------------------------------|------------------------|

Total: 1



Professional Services Pay Request PM Supervisor Review (Final Payment)

a) Review fields in the General tab, scrolling down as necessary

a

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606678/undefined/undefined?_uref=uuu624307465t1

Professional Services Pay Request Send Save

General Pay Request Details

| General | |
|----------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | PSPR-0015 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/27/2020 08:46 AM (UTC-) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Title | Internal Ref. Number |
| Matt's Consulting Inc. OCI-00081 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |
| | |

Attachments Comments Linked R

Published Attachments

C110-01-2019-MAR-AE_...

Total: 1

Professional Services Pay Request PM Supervisor Review (Final Payment)

b) Review any attachments

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606678/undefined/undefined?_uref=uuu624307465t1`. The page title is "Professional Services Pay Request". The main content area is divided into two sections: "General" and "Attachments".

General Information:

| | |
|----------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | PSPR-0015 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/27/2020 08:46 AM (UTC-:) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Title | Internal Ref. Number |
| Matt's Consulting Inc. OCI-00081 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |
| | |

Attachments Panel:

The "Attachments" panel is highlighted with a red box. It shows a list of "Published Attachments" with a table containing one entry:

| Name |
|-------------------------|
| C110-01-2019-MAR-AE_... |

A blue circle with the letter "b" is positioned over the "Attachments" tab. The "Total: 1" indicator is visible at the bottom of the attachments list.

Professional Services Pay Request PM Supervisor Review (Final Payment)

- c) Click the **Pay Request Details** tab and review line items
- d) When the record is ready to move forward, click the **Send** button

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Good

o-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606678/undefined/undefined?ref=uuu624307465t1

Professional Services Pay Request

Send Save

General **Pay Request Details**

View Currency Transaction Currency

| No. | WBS Code | Code Name | Short Description |
|-----|----------|-------------------------------|-------------------|
| 003 | AE-BS-PD | AE Pre Design Services | Additional |
| 002 | AE-AS-TI | AE Tests and Inspections | Inspections |
| 001 | AE-BS-CD | AE Construction Docs Services | Pre-Design |

Total: 3 Total Amount 25,000.00

Line Item Details Attachments Lin

General

WBS Code
AE-BS-PD

Code Name
AE Pre Design Services

Short Description
Additional

Professional Services EDGE Certified?
No

Amount (\$)
10,000.00

Subcontractor/Supplier



Professional Services Pay Request PM Supervisor Review (Final Payment)

- ▶ If the record is ready to move forward to the Owner for Payment Authorization
 - ▶ Choose **Approve**
 - ▶ Click **Send**
- ▶ If record must be returned to the PM Approval step:
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**

The image displays two screenshots of the Oracle BPM workflow action details for a Professional Services Pay Request. The top screenshot shows the 'Workflow Action Details' dialog box with the 'Workflow Actions' dropdown menu open, highlighting the 'Approve' and 'Return for Clarification' options. A red arrow points to the 'Send For' field. The bottom screenshot shows the 'Send For' field populated with 'Owners Representative Pay' and the 'Send' button highlighted by a red arrow. The 'Due Date Details' section is also visible, showing a message that the task due date is not available.



Professional Services Pay Request Owner (Representative) Payment Authorization



Professional Services Pay Request Owner (Representative) Payment Authorization

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

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

Project/Shell: Agency General Projects Test

Professional Services Pay Request PSPR-0013 is sent to you for Owners Representative Payment Authorization.

From : **Matthew Weber**
Sent For : **Owners Representative Payment Authorization**

Source Name : **Agency General Projects Test**
Record No : **Professional Services Pay Request PSPR-0013**
Title : **Matt's Consulting OCI-00081_PR1**

[Unifier Login](#)



Owner Authorization

- ▶ Click Accept Task

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

- Browser: Google Chrome
- Page Title: Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001
- URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606721?task_id=2606721&parent_id=0&viewOnly=0&project_id=100...
- Page Content: Professional Services Pay Request
- Buttons: Accept (highlighted with a red arrow), Decline, and a menu icon.
- Tabs: General (selected), Pay Request Details, Added Purchase Orders, Voucher
- Task Details Section:
 - From: Matthew Weber
 - To: Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Owner
 - Sent For: Owners Representative Payment Authorization
- General Section:
 - Organization: OAKS CI Test
 - Record Number: PSPR-0015
 - Project Number: OCI-080001
 - Creator: Matthew Weber
 - Project Name: Agency General Projects Test
 - Creation Date: 04/27/2020 08:46 AM (UTC-5)
 - Project Location: (empty)
 - Status: (empty)
- Attachments Section:
 - Published Attachments: C110-01-2019-MAR-AE_...
 - Total: 1

Owner Authorization

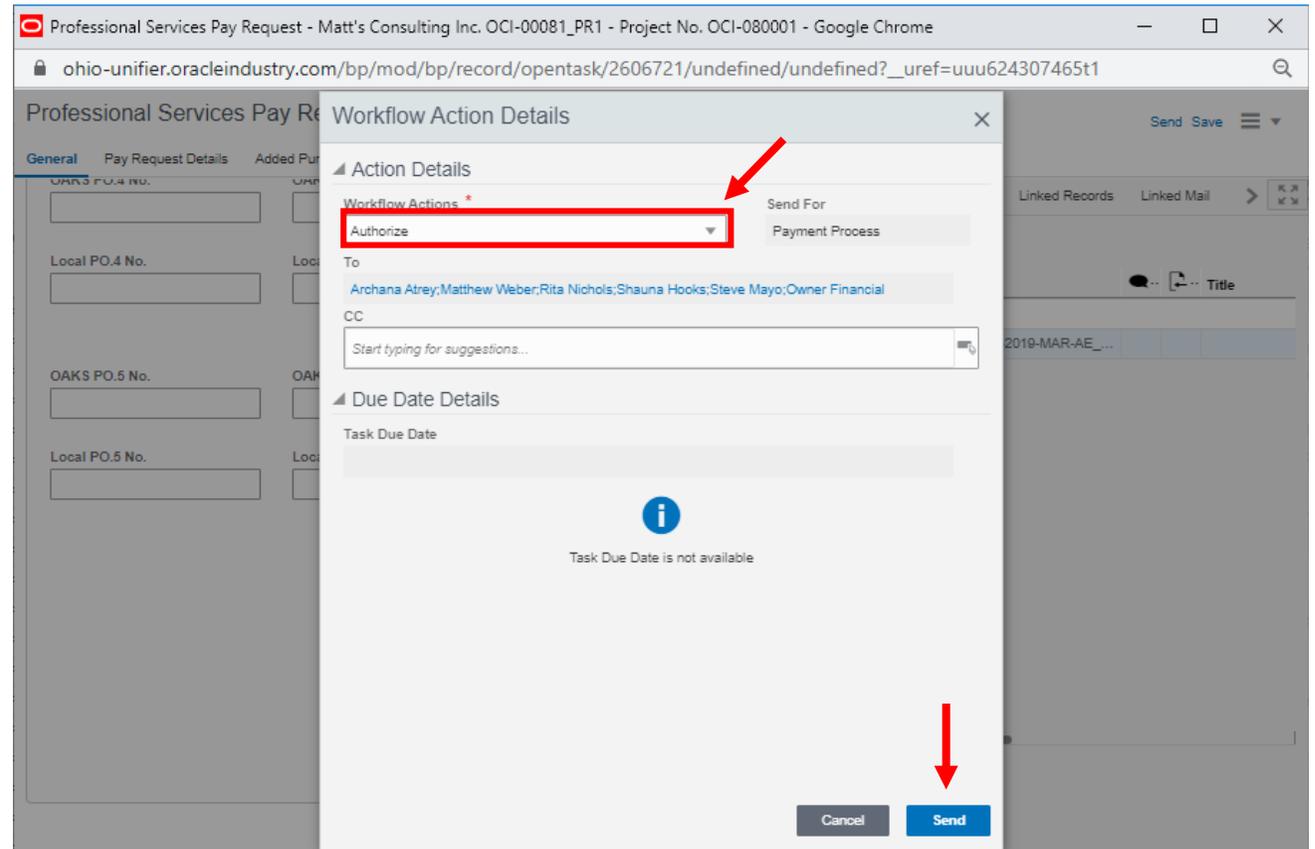
- ▶ Owner Representative will review all fields and verify funding. Authorize the Pay Request
- ▶ When the record is ready to move forward, click the **Send** button

The screenshot shows a web browser window displaying the 'Professional Services Pay Request' form. The browser title is 'Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2606721/undefined/undefined?_uref=uuu62430746541'. The form has a 'Send Save' button in the top right corner, which is circled in red. A red arrow points to this button. The form is divided into several sections: 'General', 'Pay Request Details', 'Added Purchase Orders', and 'Voucher'. The 'General' section contains a table with columns for 'OAKS PO.# No.', 'OAKS PO.# Amount (\$)', and 'Amount Applied (\$)'. There are four rows in this table, each with input fields and a '0.00' value. Below the table, there are summary fields: 'Pay Request Amount' (25,000.00), 'Total Applied (\$)' (0.00), and 'Difference (\$)' (25,000.00). On the right side of the form, there is an 'Attachments' section with a table of published attachments. One attachment is visible: 'C110-01-2019-MAR-AE_...'. A red bracket on the left side of the form indicates the area to be reviewed by the owner representative.



Owner Authorization

- ▶ Select Workflow Action: **Authorize** will submit the payment request to the Owner Financial for payment processing
- ▶ Click **Send**



Professional Services Agreement Pay Request Payment Processing (Owner Financial)



Professional Services Agreement Pay Request Payment Processing (Owner Financial)

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



Payment Processing (Owner Financial)

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

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

Project/Shell: Agency General Projects Test

Professional Services Pay Request PSPR-0015 is sent to you for Payment Process.

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

Source Name : **Agency General Projects Test**
Record No : **Professional Services Pay Request PSPR-0015**
Title : **Matt's Consulting Inc. OCI-00081_PR1**

[Unifier Login](#)



Task Action (Owner Financial)

- ▶ Click Accept Task

Professional Services Pay Request

Accept Decline

General Pay Request Details Added Purchase Orders Voucher

Task Details

From: Matthew Weber

To: Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Owner Financial

Sent For: Payment Process

General

| | | | |
|----------------|------------------------------|---------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | PSPR-0015 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/27/2020 08:46 AM (UTC-5) |

Attachments Comments Linked Records Linked Mai

| Name | Title |
|-------------------------|-------|
| C110-01-2019-MAR-AE_... | |

Total: 1

Payment Processing (Owner Financial)

- ▶ Review information in the General tab

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608178/undefined/undefined?_uref=uuu131277555t1

Professional Services Pay Request

Send Save

General Pay Request Details Added Purchase Orders Voucher

General

| | | | |
|---------------------------|--------------------------------------|---------------------------------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | PSPR-0015 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/27/2020 08:46 AM (UTC-5) |
| Project Location | OAKS CI Administration | Status | Approved |
| Title | Matt's Consulting Inc. OCI-00081_PR1 | Internal Ref. Number | |
| Contract Reference | OCI General 080001-02 | Professional Services Provider | OCI Test General |
| Agreement Type | Design | EDGE Certified? | No |
| Other Description | | Received Date | 04/27/2020 08:46 AM (UTC-5) |

Attachments Comments Li

Published Attachments

C110-01-2019-MAR-AE_...

Total: 1



Payment Processing – Create Voucher (Owner Financial)

- a) Open the Voucher tab
- b) Click Create

The image displays two screenshots of a web application interface for creating a voucher. The top screenshot shows the 'Professional Services Pay Request' page with the 'Voucher' tab selected, indicated by a red circle and arrow labeled 'a'. The bottom screenshot shows the same page with the '+ Create' button highlighted, indicated by a red circle and arrow labeled 'b'. The interface includes a left sidebar with project details and a main table area for vouchers.

Project Details (Left Sidebar):

- Organization: OAKS CI Test
- Project Number: OCI-080001
- Project Name: Agency General Projects Test
- Project Location: OAKS CI Administration
- Title: Matt's Consulting Inc. OCI-00081_PR1
- Contract Reference: OCI General 080001-02
- Agreement Type: Design
- Other Description: [Empty field]

Voucher Table (Right Panel):

| Title | Vendor Name | Voucher Description | Amount (\$) | Status | OAKS Vou... | Local |
|----------|-------------|---------------------|-------------|--------|-------------|-------|
| Total: 0 | | | | | | |

Payment Processing (Owner Financial) Record Voucher

- ▶ Under the General tab:
 - ▶ Title the Record
 - ▶ **Set the Record Status to: Paid**
 - ▶ Choose Financial System of Record

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen_prof_ser_pay_request_bp/20265/3?__uref=uuu131277555t1

Create New Vouchers Submit Save

General Voucher Distribution Line

General

Organization: OAKS CI Test Record Number: [Empty]

Project Number: OCI-080001 Creator: Matthew Weber

Project Name: Agency General Projects Test Creation Date: [Calendar Icon]

Project Location: OAKS CI Administration

Title *: PSPR OCI-080001 MW2 **Status ***: Paid

Financial System of Record *: OAKS FIN

Attachments: No Attachments

Payment Processing (Owner Financial)

- ▶ Scroll down the General tab using the slider
- ▶ Pay request details should be populated

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen_prof_ser_pay_req...

Create New Vouchers Submit Save

General Voucher Distribution Line

Select a Professional Services Pay Request to Voucher. Supporting data from Project Vendor can be updated if needed.

| | |
|--------------------------------------|---|
| Professional Serv. Pay Request Name | Professional Services Pay Request Amount (\$) |
| Matt's Consulting Inc. OCI-00081_... | 25,000.00 |

▶ DPE PS Pay Request

Select a Miscellaneous Invoice to Voucher. Supporting data from Project Vendor can be updated if needed.

| | |
|----------------------------|-----------------------------------|
| Miscellaneous Invoice Name | Miscellaneous Invoice Amount (\$) |
| Type a Title... | 0.00 |

Select a Miscellaneous Expense Record to Voucher.

| | |
|----------------------------|-----------------------------------|
| Miscellaneous Expense Name | Miscellaneous Expense Amount (\$) |
| Type a Title... | 0.00 |

| | |
|------------------------------|-------------|
| Vendor Name | Amount (\$) |
| OCI Test General | 25,000.00 |
| Amount on Other Voucher (\$) | 0.00 |
| Amount on This Voucher (\$) | 25,000.00 |
| Line Item Total (\$) | 0.00 |
| Difference (\$) | 25,000.00 |



Payment Processing (Owner Financial)

- a) Scroll down to Voucher Line 1
- b) Click the button to choose **OAKS PO Name**
- c) Highlight appropriate PO
- d) Click **Select**

The screenshot shows the 'Create New Vouchers' web application. The 'Voucher Line 1' section is highlighted with a red box and contains the following fields:

- OAKS PO Name 1: (with a magnifying glass icon circled in red and labeled 'b')
- Amount (\$):
- OAKS PO No.:
- System Total (\$):
- Local PO No.:
- Difference (\$):

The 'Voucher Details' section contains the following fields:

- OAKS Voucher ID:
- Local Voucher ID: (labeled 'c')
- OAKS Payment Date: (with a calendar icon)
- Local Payment Date: (with a calendar icon)
- OAKS Payment Method: (with a dropdown arrow)
- Local Payment Method: (with a dropdown arrow)
- OAKS Payment Amount (\$):
- Local Payment Amount (\$):

The 'Purchase Orders' modal window is open, showing a table of purchase orders. The 'Select' button at the bottom right is circled in red and labeled 'd'.

| Title | Contract Name | OAKS P... | Local P... | Total Am... |
|------------------------------------|---------------------------------|------------|------------|-------------|
| OCI Test PO - mmv | mmv-test new workflow | | | 176,000.00 |
| Local Admin Fees | Local Admin Fees | 0009877 | | 5,000.00 |
| Consultant List Fees | Consultant List Fees | 12345567 | | 5,000.00 |
| Test PO - Brett | Test - GeneralTest Agreement #2 | 12345 | | 1,000.00 |
| PO #2 | | | | 0.00 |
| PO #1 | Test - General | 12345 | | 0.00 |
| PO Test 2 | Test - General | 852741 | | 3,500.00 |
| PO Test 1 | C Testtest#2 | | | 0.00 |
| My Company PO1 | Migration 2 | 0009998888 | | 0.00 |
| Testing | Test Agreement | | | 4,000.00 |
| Agreement 5 (Louis and Clark Arch) | SAO Agency | 1234567888 | | 0.00 |
| Purchase order test | | | | 0.00 |
| Test | ContDist Test 001 | | | 0.00 |
| Total: 14 | | | | |

Payment Processing (Owner Financial)

e) Enter PO Amount

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen_prof_ser_pay_req...

Create New Vouchers

Submit Save

General Voucher Distribution Line

Voucher Line 1
Enter the PO this voucher will be paid from. More lines are available after the Voucher Details block

| | |
|-------------------|----------------------|
| OAKS PO Name 1 | Amount (\$) |
| OCI Test PO - mmw | 25,000.00 |
| OAKS PO No. | Line Item Total (\$) |
| | 0.00 |
| Local PO No. | Difference (\$) |
| | 25,000.00 |

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

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



Payment Processing (Owner Financial)

f) In the Voucher Details Section Enter:

- ▶ Voucher ID number (Check #)
- ▶ Payment Date
- ▶ Payment Method
- ▶ Payment Amount

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen_prof_ser_pay_req...

Create New Vouchers

Submit Save

General Voucher Distribution Line

Enter the PO this voucher will be paid from. More lines are available after the voucher details block.

| | |
|-------------------|----------------------|
| OAKS PO Name 1 | Amount (\$) |
| OCI Test PO - mmw | 25,000.00 |
| OAKS PO No. | Line Item Total (\$) |
| | 0.00 |
| Local PO No. | Difference (\$) |
| | 25,000.00 |

Voucher Details

OAKS Voucher Number should be 8 digits ex: 00005678

| | |
|-----------------------------|---------------------------|
| OAKS Voucher ID | Local Voucher ID |
| 01234569 | |
| OAKS Payment Date | Local Payment Date |
| 04/28/2020 05:00 PM (UTC-5) | MM/DD/YYYY HH:MM AM |
| OAKS Payment Method | Local Payment Method |
| Electronic Payment (EFT) | Select |
| OAKS Payment Amount (\$) | Local Payment Amount (\$) |
| 25,000.00 | 0.00 |



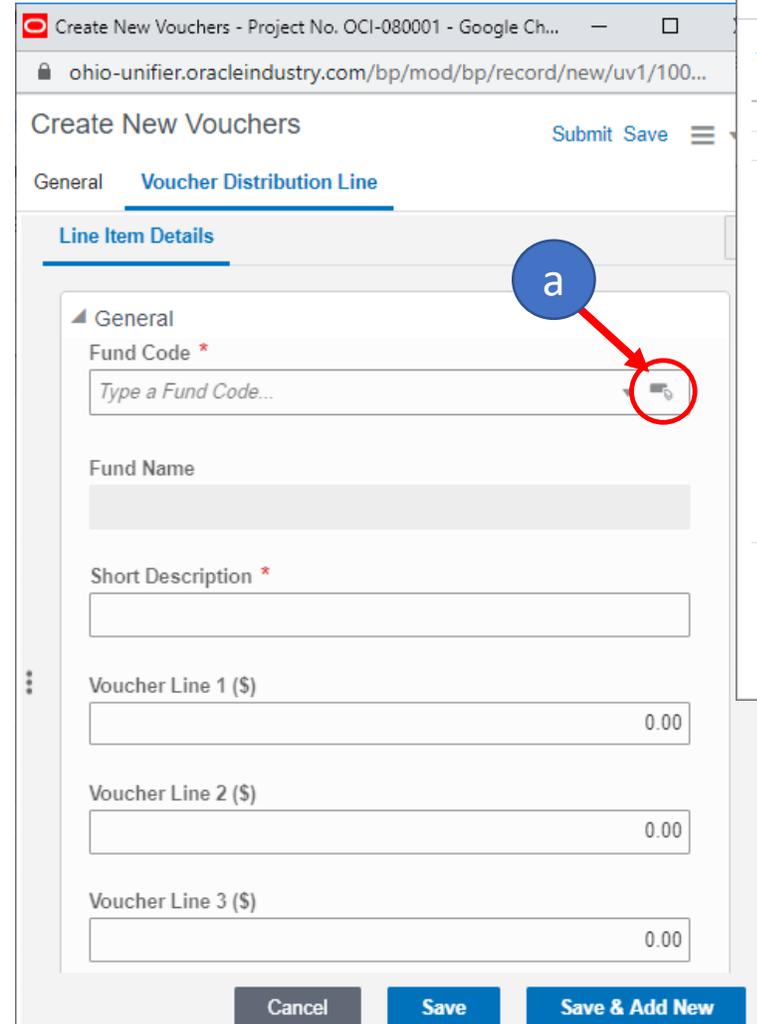
Payment Processing (Owner Financial)

- ▶ Open **Voucher Distribution Lines** tab
- ▶ Click **Add**

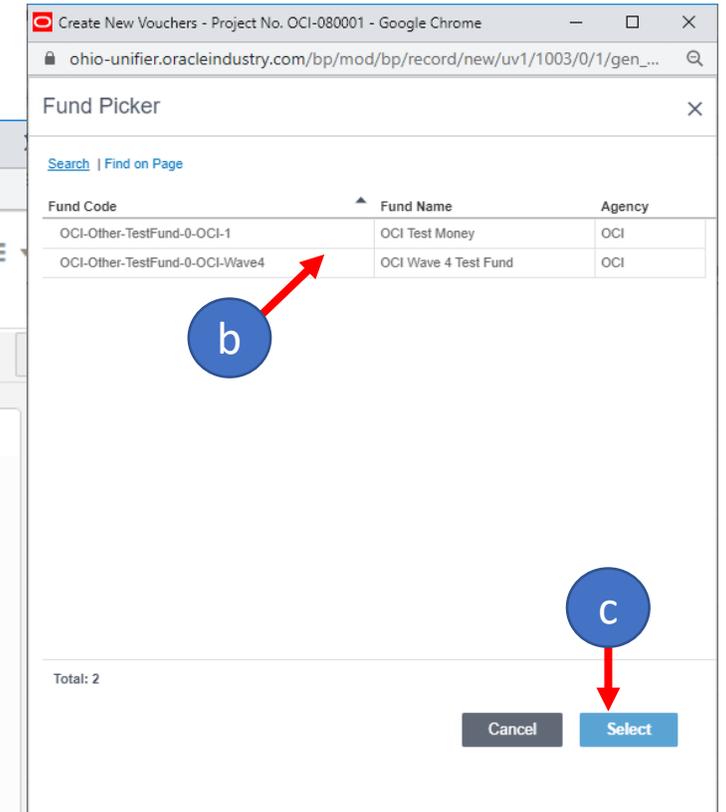
The screenshot displays the 'Create New Vouchers' interface in Google Chrome. The browser address bar shows the URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen_prof_ser_pay_req... The page title is 'Create New Vouchers'. The 'General' tab is selected, and the 'Voucher Distribution Line' sub-tab is active, circled in red. A red arrow points to this sub-tab. Below the tabs, there are input fields for 'OAKS PO Name 1' (OCI Test PO - mmw), 'OAKS PO No.', and 'Local PO No.'. The 'Voucher Details' section includes 'OAKS Voucher ID' (01234569), 'OAKS Payment Date' (04/28/2020 05:00 PM (UTC-5)), 'OAKS Payment Method' (Electronic Payment (EFT)), and 'OAKS Payment Amount (\$)' (25,000.00). At the bottom, there is a 'Total: 0' and a 'Total Amount' dropdown set to 0.00. A red arrow points to the 'Add' button in the 'Voucher Distribution Line' sub-tab. An information message on the right states: 'Details of the line item is not available. Select a line item to view the details.'

Payment Processing (Owner Financial)

- a) Click the button to select a Fund Code
- b) Highlight a Fund Code
- c) Click **Select**



The screenshot shows the 'Create New Vouchers' form in a web browser. The 'Fund Code' field is highlighted with a red circle, and a red arrow points to it from a blue circle labeled 'a'. The form includes fields for 'Fund Name', 'Short Description', and three 'Voucher Line' amounts, each set to 0.00. At the bottom, there are 'Cancel', 'Save', and 'Save & Add New' buttons.



The screenshot shows the 'Fund Picker' dialog box. It contains a table with the following data:

| Fund Code | Fund Name | Agency |
|--------------------------------|----------------------|--------|
| OCI-Other-TestFund-0-OCI-1 | OCI Test Money | OCI |
| OCI-Other-TestFund-0-OCI-Wave4 | OCI Wave 4 Test Fund | OCI |

A red arrow points from a blue circle labeled 'b' to the second row of the table. Another red arrow points from a blue circle labeled 'c' to the 'Select' button at the bottom right of the dialog. The 'Select' button is highlighted in blue. There are also 'Cancel' and 'Total: 2' labels visible.



Payment Processing (Owner Financial)

- d) Enter Short Description and amount
- e) Click **Save** or **Save & Add New** to add additional funding lines

The screenshot shows a web browser window titled "Create New Vouchers - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen...". The page title is "Create New Vouchers" with a "Submit Save" button. The "General" tab is selected, and the "Voucher Distribution Line" sub-tab is active. The "Line Item Details" section is expanded, showing a "General" section with the following fields:

- Fund Code *: OCI-Other-TestFund-0-OCI-1
- Fund Name: OCI Test Money
- Short Description *: Test Fund
- Voucher Line 1 (\$): 25,000.00
- Voucher Line 2 (\$): 0.00
- Voucher Line 3 (\$): 0.00
- Voucher Line 4 (\$): 0.00
- Voucher Line 5 (\$): 0.00

At the bottom of the form, there are three buttons: "Cancel", "Save", and "Save & Add New". The "Save" and "Save & Add New" buttons are circled in red, and a blue circle with the letter 'e' points to them.



Payment Processing (Owner Financial)

- ▶ Your line(s) will show in the Voucher Distribution Lines tab
- ▶ Click **Submit** to finish recording the voucher

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/uv1/1003/0/1/gen_prof_ser_pay_request_bp/20165/3?_uref=uuu131...

Create New Vouchers

General **Voucher Distribution Line**

Line Item Details Attachments Linked Records

| No. | Fund Code | Fund |
|-----|----------------------------|------|
| 001 | OCI-Other-TestFund-0-OCI-1 | OCI |

Line Item Details

General

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

Fund Name
OCI Test Money

Short Description *
Test Fund

Voucher Line 1 (\$)
25,000.00

Voucher Line 2 (\$)
0.00

Voucher Line 3 (\$)
0.00

Total: 1
Total Amount: 25,000.00

Cancel Save Save & Add New



Payment Processing (Owner Financial)

- a) Return to the **General** tab
- b) Scroll down to the **Voucher Information** section
- c) Click the button to select previously recorded **Voucher**
- d) Highlight **Voucher**
- e) Click **Select**

The screenshot shows the 'Professional Services Pay Request' interface. The 'General' tab is selected and circled in red, with a blue circle 'a' pointing to it. Below the tabs, there are fields for OAKS PO.5 No., OAKS PO.5 Amount (\$), and Amount Applied (\$). The OAKS PO.5 Amount is 0.00. There are also fields for Local PO.5 No., Local PO.5 Amount (\$), and Amount Applied (\$). The Local PO.5 Amount is 0.00. The Pay Request Amount is 25,000.00. The Total Applied (\$) is 0.00. The Difference (\$) is 25,000.00. The Voucher Information section is visible, with a search button circled in red and a blue circle 'c' pointing to it. The Voucher field is empty. The Voucher Title and Voucher Amount (\$) are also visible. The Voucher Amount is 0.00. The Attachments section is visible on the right, with a blue circle 'b' pointing to it. The Vouchers table is open, showing a list of vouchers. The first row is highlighted, with a blue circle 'd' pointing to it. The table has columns for Title, Vendor Name, Voucher Description, Amount (\$), Status, and OAKS V. The table contains 18 rows of data. The 'Select' button is circled in red, with a blue circle 'e' pointing to it. The 'Cancel' button is also visible.

| Title | Vendor Name | Voucher Description | Amount (\$) | Status | OAKS V |
|----------------------------|-------------------------------------|-----------------------------|-------------|----------|---------|
| PSPR OCI-080001 MW2 | OCI Test General | Matt's Consulting Inc. O... | 25,000.00 | Paid | 0123456 |
| PSPR OCI-080001 MW1 | OCI Test General | Matt's Consulting OCI-0... | 146,000.00 | Paid | 0123456 |
| Local Admin Fees | Ohio Facilities Construction Com... | Local Admin Fees | 5,000.00 | Paid | 000899E |
| test | | | 0.00 | Paid | |
| Test Voucher | OCI Test GeneralOCI Test General | OCI Test General PR 2... | 5,378.00 | Paid | 1234567 |
| Contractor Pay Request 001 | OCI Test General | PR-004 Test | 2,960.00 | Paid | 1234567 |
| M Test | OCI Migration Inc | Migration 1 | 400.00 | Paid | |
| Testing | OCI Test General | Testing | 0.00 | Paid | |
| Cloud Migration Test | OCI Test General | Cloud Migration Test | 6,508.00 | Paid | 0000122 |
| Test | OCI Test General | Misc. Inv | 50.00 | Paid | |
| Voucher Title | OCI Test General | PR #4 | 2,500.00 | Paid | 0000454 |
| d | | | 0.00 | Paid | |
| OCI Test | OCI Test General | OCI Test General PR.2 | 378.00 | Paid | |
| OCI Test PR 1 | OCI Test General | OCI Test General PR 1 | 1,098.00 | Paid | |
| jfkjflka | OCI Test General | PR #1 | 1,600.00 | Paid | |
| 2test | OCI Test General | pr#3 | 2,900.00 | Approved | |
| 1test | OCI Test General | PR#2 | 8,300.00 | Approved | |
| test #2 | OCI Test General | PR #1 | 1,600.00 | Approved | |

Payment Processing (Owner Financial)

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

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608178/undefined/undefined?__uref=uuu13127755...

Professional Services Pay Request

Send Save

General Pay Request Details Added Purchase Orders Voucher

| | | |
|----------------------|------------------------|---------------------|
| OAKS PO.5 No. | OAKS PO.5 Amount (\$) | Amount Applied (\$) |
| <input type="text"/> | 0.00 | 0.00 |
| Local PO.5 No. | Local PO.5 Amount (\$) | Amount Applied (\$) |
| <input type="text"/> | 0.00 | 0.00 |

Pay Request Amount: 25,000.00

Total Applied (\$): 0.00

Difference (\$): 25,000.00

Voucher Information

Voucher *
OCI Test General

| | |
|---------------------|---------------------|
| Voucher Title | Voucher Amount (\$) |
| PSPR OCI-080001 MW2 | 25,000.00 |

Attachments Comments

Published Attachments

C110-01-2019-MAR-AE_...

Total: 1

Payment Processing (Owner Financial)

- ▶ Verify Workflow Action
- ▶ Click **Send**
- ▶ This will end the Professional Services Pay Request Workflow

Professional Services Pay Request - Matt's Consulting Inc. OCI-00081_PR1 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608178/undefined/undefined?__uref=uuu13127755...

Professional Services Pay Request

Workflow Action Details

General Pay Request

OAKS PO.5 No.

Local PO.5 No.

Voucher Information

Voucher *

OCI Test Genera

Voucher Title

PSPR OCI-0800

Action Details

Workflow Actions *

Vouchered

Send For

End

CC

Start typing for suggestions...

Cancel Send



Professional Services Amendments



Notes on Amendments

- ▶ Revisions to the scope of work of a Professional Services Provider requires written authorization from the Contracting Authority
- ▶ Adjustments in Basic Services Fees, Additional Services, or Reimbursable Expenses resulting from changes in scope of work or additional time must be processed and approved by the Contracting Authority with revisions in funding certified by the Owner



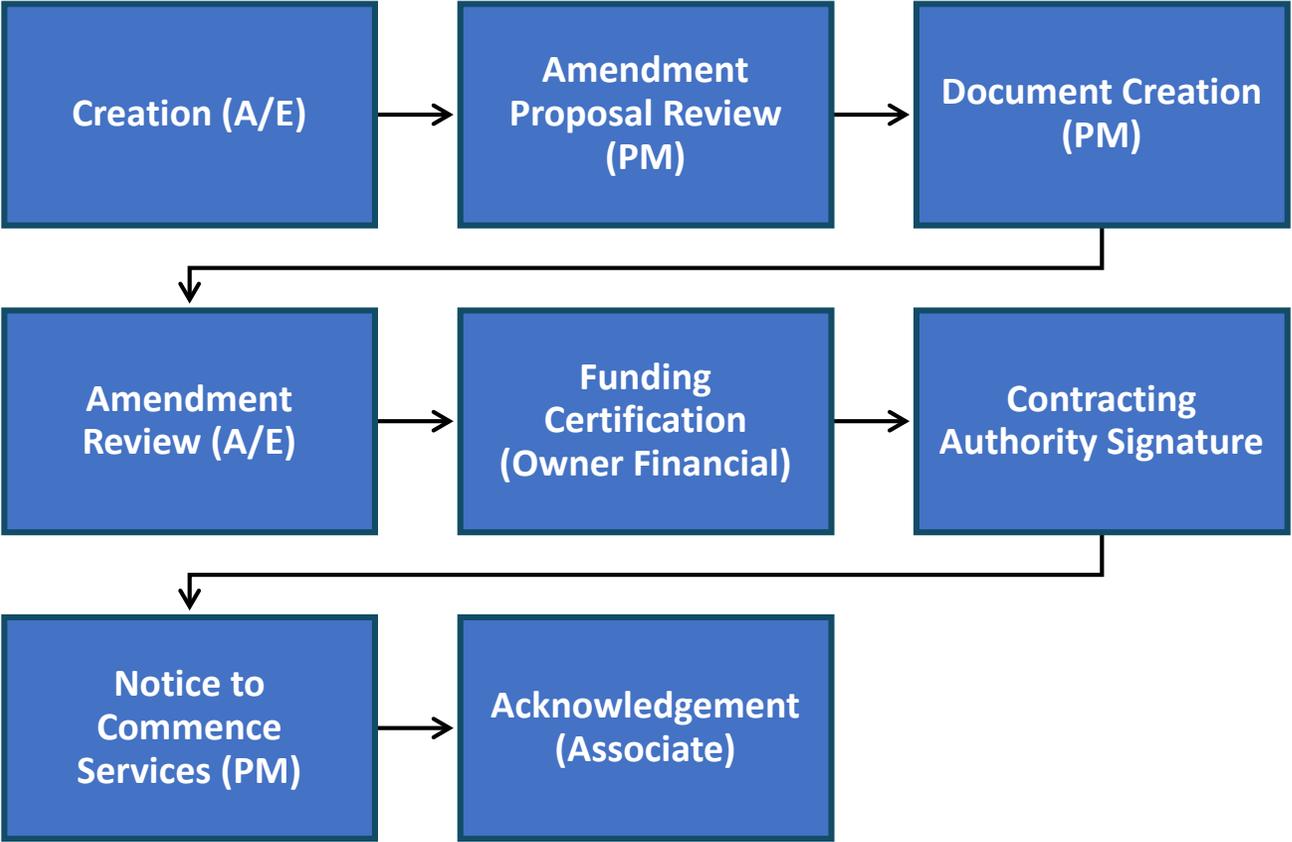
Purpose & Procedure

- ▶ The PS Amendment Business Process (BP):
 - ▶ Provides for the submission, review, and approval of amendments to the Professional Services Agreement
 - ▶ Provides the Amendment document and other necessary communication using custom prints
 - ▶ Allows the addition of new line items or modification of line item through use of the Reference selection
- ▶ Once the approval process has been completed, which includes funding, a “Notice to Commence Services” will be sent to the Professional Services Provider authorizing work to begin



Professional Services Amendments

- ▶ Workflow Steps



Click the boxes to navigate directly to each section

Create a Professional Services Amendment (A/E)



Create a Professional Services Amendment (A/E)

▶ Log into OAKS CI

a. Click + sign

b. Type project name or number

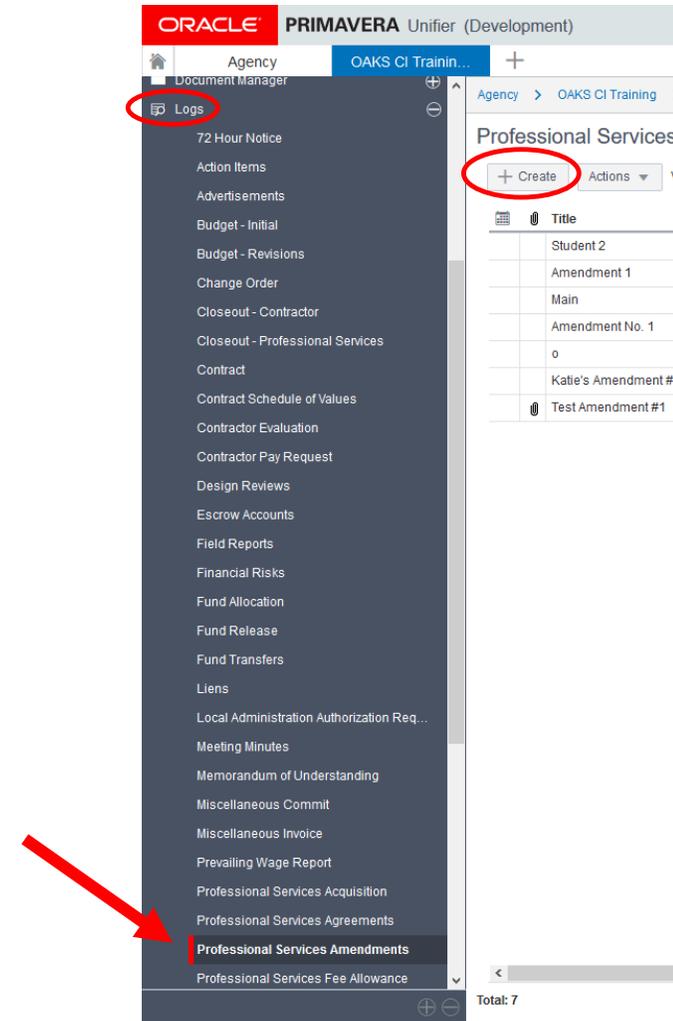
c. Click appropriate project to open

The screenshot displays the OAKS CI web application interface. At the top, there is a navigation bar with tabs for 'School Facilities', 'Organization Te...', 'OAKS CI Admin', 'Test V2', and '2.0 Test'. A red box labeled 'a' highlights a '+' sign in the top right corner. Below the navigation bar, a search bar is visible with the placeholder text 'Search by Name or Number...'. A dropdown menu is open, showing a list of recent locations and bookmarks. A red arrow labeled 'b' points to the search bar, and a red arrow labeled 'c' points to the 'OAKS CI Training 1' entry in the dropdown menu. The main content area shows a table with columns for 'Professional Services Provider', 'Agreement Type', and 'Total Agreement Amo...'. The table lists various providers and their agreement types, such as 'Architectural Inc.' and 'Design'. To the right of the table, there is a sidebar with 'Recent Locations', 'Bookmarks', and 'Key Locations' sections. The 'Recent Locations' section lists 'OAKS CI Training 1', 'OAKS CI Admin', '2.0 Test', 'Test V2', and 'OAKS CI Training'. The 'Bookmarks' section lists 'Training Project - Home' and 'Projects (Standard)'. The 'Key Locations' section lists 'Company Workspace', 'Projects', 'Agency', 'Higher Ed', and 'School Facilities'. Below the sidebar, there is a detailed view for 'OAKS CI Training 1' with fields for 'Project Location', 'Status', 'Title', 'Selection Method', 'Delivery Method', 'Total Project Cost \$', and 'EDGE Goal Percent'.



Create a Professional Services Amendment (A/E)

- ▶ In OAKS CI, navigate to:
 - ▶ Logs -> **Professional Services Amendment**
 - ▶ Click **Create**



Create Amendment (A/E)

- Fill out the General section (All Items with a red * are required)
- To enter the Contract Reference, click the button on the right side of the field and highlight the appropriate contract
- Click **Select**
- Scroll down to complete the rest of the General section

a

b

c

d

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?_uref=uuu13127755t1

Create New Professional Services Amendments

Send Save

General Amendment Details

General

Organization
OAKS CI Test

Record Number

Project Number
OCI-080001

Creator
Matthew Weber

Project Name
Agency General Projects Test

Creation Date

Project Location
OAKS CI Administration

Status

Amendment No. *
080001-2

Fee Title
OFCC Standard

Title *
Amendment 080001-2

Contract Reference *
OCI General 080001-02

Professional Services Provider
OCI Test General

Agreement Type
Design

EDGE Certified?
No

Other Description

Amount (\$) *
5,000.00

Selection Method
Competitive Selection

Line Item Total (\$)
0.00

Difference (\$)
5,000.00

Professional Services Agreements

| Title | Professional Services Provi... | Agreement Type | Total Agreement A... | CA Ho... |
|--------------------------|----------------------------------|----------------|----------------------|----------|
| OCI General 080001-02 | OCI Test General | Design | 176,000.00 | |
| Test UI - mmw 3 | OCI Test General | Design | 146,000.00 | |
| mmw-test new workflow | OCI Test General | Design | 176,000.00 | |
| mmw-Test Agreement | OCI Test General | Design | 8,000,000.00 | |
| Test Agreement | Zenith Systems, LLC | Design | 1,000.00 | |
| Agreement #3 | Fanning/Howey Associations, Inc. | Design | 32,500.00 | |
| Migration 2 | OCI Migration Inc | Design | 1,100.00 | |
| Angie's Test | OCI Test General | SAO/Agency | 0.00 | |
| test#2 | OCI Test General | Design | 12,000.00 | |
| Agreement w internal a/e | OCI Test General | Design | 55,000.00 | |
| Test Agreement | OCI Test General | Design | 15,000.00 | |
| Test Agreement | OCI Test General | Design | 12,000.00 | |

Total: 12

Cancel Select



Create Amendment (A/E)

- e) Complete Summary, Why, and What sections in the General section OR add attachments containing these details
- f) Click the **Amendment Details** tab

The screenshot shows a web browser window titled "Create New Professional Services Amendments" with the URL "ohio-unifier.oracleindustry.com/mod/bp/record/new/upsa2/1003/266?_uref=uuu131277555t1". The page has two tabs: "General" and "Amendment Details", with the latter circled in red. A blue circle with the letter 'f' points to the "Amendment Details" tab. The main content area contains four sections: "Summary of Additional Services/Reimbursables" (with a "Summary" sub-section), "Explain WHY Agreement is being Amended" (with a "Why" sub-section), "What is the EFFECT of the Amendment on the Project" (with a "What" sub-section), and "Notes". A red bracket on the left side of the form, labeled with a blue circle 'e', encompasses the first three sections. On the right side, there is an "Attachments" section with a red circle around the attachment icon and a blue circle 'e' pointing to it. Below the attachments is an "Information" section with the text "No Attachments."

Create Amendment (A/E)

- a) To add Line Items click **Add**
- b) If you are referencing a current line in your agreement click the select button next to Reference
- c) Highlight a Line Item and click **Select**
- d) Fill out the Amount field
- e) Click **Save & Add New** to add another line, otherwise click **Save**

The screenshot displays the 'Create New Professional Services Amendments' interface. The main window is titled 'Create New Professional Services Amendments' and shows the 'Amendment Details' tab. The 'Add' button is circled in red and labeled 'a'. The 'Reference' field contains the value '2', and the select button next to it is circled in red and labeled 'b'. The 'WBS Code' is 'AE-AS-TI', the 'Code Name' is 'AE Tests and Inspections', and the 'Short Description' is 'Tests and Inspections'. The 'Amount (\$)' field is circled in red and labeled 'd', with the value '5,000.00'. The 'Save & Add New' button is circled in red and labeled 'e'. A secondary window titled 'Commit Line Item Picker' is open, showing a table of line items. The table has columns for 'Item #', 'Ref', 'Description', and 'CBS Code'. The items are: 000010 (Pre Design, AE-BS-CD), 000020 (Tests and Inspections, AE-AS-TI), 000030 (Additional, AE-BS-PD), and 000040 (Change Order Allowance, OR-CF-AE). The 'Select' button in the picker is circled in red and labeled 'c'. The 'Total: 4' is shown at the bottom of the picker.

| Item # | Ref | Description | CBS Code |
|--------|-----|------------------------|----------|
| 000010 | 1 | Pre Design | AE-BS-CD |
| 000020 | 2 | Tests and Inspections | AE-AS-TI |
| 000030 | 3 | Additional | AE-BS-PD |
| 000040 | 4 | Change Order Allowance | OR-CF-AE |

Create Amendment (A/E)

- If you are creating a new Line Item, click the button next to WBS Code
- Click the **Collapse** button
- Choose CBS code and click **Select**
- Fill out required fields marked with a red *
- Click **Save & Add New** to add another line, otherwise click **Save**

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?_uref=uuu13127755t1

Create New Professional Services Amendments Send Save

General **Amendment Details**

Add Actions

| No. | Refer... | WBS Code | Code |
|-----|----------|----------|------|
| | | | |

Line Item Details

General

Reference
Type a Reference No...

WBS Code *
AE-AS-TI

Code Name
AE Tests and Inspections

Short Description *
Inspection

Professional Services EDGE Certified?
No

Amount (\$) *
5,000.00

Subcontractor/Supplier
Type a Subcontractor/Supplier...

EDGE Certified?

Total Amount: 0.00
Total: 0

Cancel Save **Save & Add New**

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?_uref=uuu13127755t1

CBS Picker

Search

| CBS Code | CBS Name |
|-----------------|---------------------------------|
| AE-AS-EN | AE Environmental Survey |
| AE-AS-GT | AE Geotechnical Investigation |
| AE-AS-HM | AE Hazardous Materials Survey |
| AE-AS-LD | AE LEED Documentation Services |
| AE-AS-MV | AE Measurement and Verification |
| AE-AS-OT | AE Other Additional Services |
| AE-AS-PF | AE Partnering Facilitation |
| AE-AS-PR | AE Program of Requirements |
| AE-AS-SU | AE Site Surveying Services |
| AE-AS-TI | AE Tests and Inspections |
| AE-AS-WS | AE Warranty Services |
| AE-RE-00 | AE Reimbursable Expense |
| RF-00-00 | Regulatory Fees Summary |

Total: 343

Cancel **Select**



Create Amendment (A/E)

- f) Saved Line Items will display
- g) When all lines have been added, note the **Total Amount**
- h) Click the General tab

h

General Amendment Details

Add Actions

| No. | Refer... | WBS Code | Code Name |
|-----|----------|----------|--------------------------|
| 001 | 2 | AE-AS-TI | AE Tests and Inspections |

f

g

Total: 1

Total Amount : 5,000.00

Line Item Details Attachments Linked Records

General

Reference

2

WBS Code *

AE-AS-TI

Code Name

AE Tests and Inspections

Short Description *

Tests and Inspections

Cancel Save

Create Amendment (A/E)

- i) In the General section, the **Line Item Total (\$)** field will be updated. Ensure that this number is equal to the **Amount (\$)** field, and the **Difference (\$)** field equals \$0.00

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

Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?__uref=uuu13127755t1

Create New Professional Services Amendments

Send Save

General Amendment Details

| | | | |
|----------------------|------------------------------|--------------------------------|-------------------|
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | |
| Project Location | OAKS CI Administration | Status | |
| Amendment No. * | 080001-2 | Fee Title | OFCC Standard Fee |
| Title * | Amendment 080001-2 | Amendment Execution Date | |
| Contract Reference * | OCI General 080001-02 | Professional Services Provider | OCI Test General |
| Agreement Type | Design | EDGE Certified? | No |
| Other Description | | Amount (\$) * | 5,000.00 |
| Selection Method | Competitive Selection | Line Item Total (\$) | 5,000.00 |
| | | Difference (\$) | 0.00 |

Attachments Comments

Information
No Attachments.

Create Amendment (A/E)

- ▶ Verify Workflow Action
- ▶ Click **Send**
- ▶ The record will move forward to PM for Amendment Proposal Review

The screenshot shows a web browser window titled "Create New Professional Services Amendments - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?__uref=uuu13127755t1#". The main content is a "Workflow Action Details" modal window. It has a "General" tab selected. Under "Action Details", the "Workflow Actions *" dropdown is set to "Submit Amendment Proposal" and is highlighted with a red box. The "Send For" field is "Amendment Proposal Review". The "To" field contains "Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Manager". The "CC" field is empty with a placeholder "Start typing for suggestions...". Under "Due Date Details", the "Task Due Date" field is empty, and a message below it says "Task Due Date is not available" with an information icon. At the bottom right, there are "Cancel" and "Send" buttons, with a red arrow pointing to the "Send" button.

Professional Services Amendment Amendment Proposal Review (PM)



Professional Services Amendment Amendment Proposal Review (PM)

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

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

Project/Shell: Agency General Projects Test

Professional Services Amendments Amend-0007 is sent to you for Amendment Proposal Review.

From : **Matthew Weber**
Sent For : **Amendment Proposal Review**

Source Name : **Agency General Projects Test**
Record No : **Professional Services Amendments Amend-0007**
Title : **OCI Test Amendment**

[Unifier Login](#)



Amendment Proposal Review (PM)

- ▶ Click Accept to begin work on the task

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

- Browser Tab:** Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome
- URL:** ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608903?task_id=2608903&parent_id=0&viewOnly=0&project_id=1003...
- Page Title:** Professional Services Amendments
- Navigation:** A red arrow points to the **Accept** button, with **Decline** and a menu icon also visible.
- Tabs:** General (selected), Amendment Details, Purchase Order
- Task Details:**
 - From:** Matthew Weber
 - To:** Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Manager
 - Sent For:** Amendment Proposal Review
- General Information:**
 - Organization:** OAKS CI Test
 - Record Number:** Amend-0008
 - Project Number:** OCI-080001
 - Creator:** Matthew Weber
 - Project Name:** Agency General Projects Test
 - Creation Date:** 04/28/2020 12:20 PM (UTC-5)
 - Project Location:** OAKS CI Administration
 - Status:** Pending
- Attachments:** A table showing one published attachment: **mmw-note.txt**. The table has columns for Name, Title, and other metadata.
- Summary:** Total: 1



Amendment Proposal Review (PM)

- ▶ Fill out the required fields in the General tab
- ▶ Choose the Selection Method

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608903/undefined/undefined?_uref=uuu131...

Professional Services Amendments Send Save ☰

General Amendment Details Purchase Order

OCI-080001 Matthew Weber

Project Name: Agency General Projects Test | Creation Date: 04/28/2020 12:20 PM (UTC-5)

Project Location: OAKS CI Administration | Status: Pending

Amendment No.: 080001-2 | Fee Title: OFCC Standard Fee

Title: Amendment 080001-2 | Amendment Execution Date:

Contract Reference: OCI General 080001-02 | Professional Services Provider: OCI Test General

Agreement Type: Design | EDGE Certified?: No

Other Description: | Amount (\$): 5,000.00

Selection Method *: **Competitive Selection** | Line Item Total (\$): 5,000.00

OFCC Fee Waiver: Select | Difference (\$): 0.00

Attachments: Published Attachments: mmmw-note.

Total: 1



Amendment Proposal Review (PM)

- ▶ Scroll down to review the details of the Amendment in the Summary, Why, and What fields. Review attached documentation as necessary.

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608903/undefined/undefined?_uref=uuu1312775...

Professional Services Amendments

Send Save

General Amendment Details Purchase Order

| | |
|-----------------------|----------|
| Competitive Selection | 5,000.00 |
|-----------------------|----------|

OFCC Fee Waiver

Difference (\$)

| | |
|--------|------|
| Select | 0.00 |
|--------|------|

Summary of Additional Services/Reimbursables

Summary

Explain WHY Agreement is being Amended

Why

Attachments

Published Attachments

mmw-note.b

Total: 1



Amendment Proposal Review (PM)

- ▶ Check that the Total Amount in the Amendment Details tab is equal to the Line Item Total from the General Tab and Line Item Total (\$) fields match, and the Difference (\$) field shows 0.00

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608903/undefined/undefined?_uref=uuu1312775...

Professional Services Amendments

Send Save

General Amendment Details Purchase Order

Agency General Projects Test 04/28/2020 12:20 PM (UTC-5)

Project Location: OAKS CI Administration Status: Pending

Amendment No.: 080001-2 Fee Title: OFCC Standard Fee

Title: Amendment 080001-2 Amendment Execution Date:

Contract Reference: OCI General 080001-02 Professional Services Provider: OCI Test General

Agreement Type: Design EDGE Certified?: No

Other Description:

Selection Method *: Competitive Selection

OFCC Fee Waiver: Select

Amount (\$) 5,000.00

Line Item Total (\$) 5,000.00

Difference (\$) 0.00

Attachments

Published Attachments

mmw-note.b

Total: 1



Amendment Proposal Review (PM)

- ▶ Click the Attachments tab or Comments tab to review
- ▶ If the record is ready to move forward, click **Send**

The screenshot displays the 'Professional Services Amendments' interface in a web browser. The browser title is 'Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2608903/undefined/undefined?_uref=ud...'. The page title is 'Professional Services Amendments'. There are three tabs: 'General', 'Amendment Details', and 'Purchase Order'. The 'General' tab is active. The main content area shows a form with the following fields:

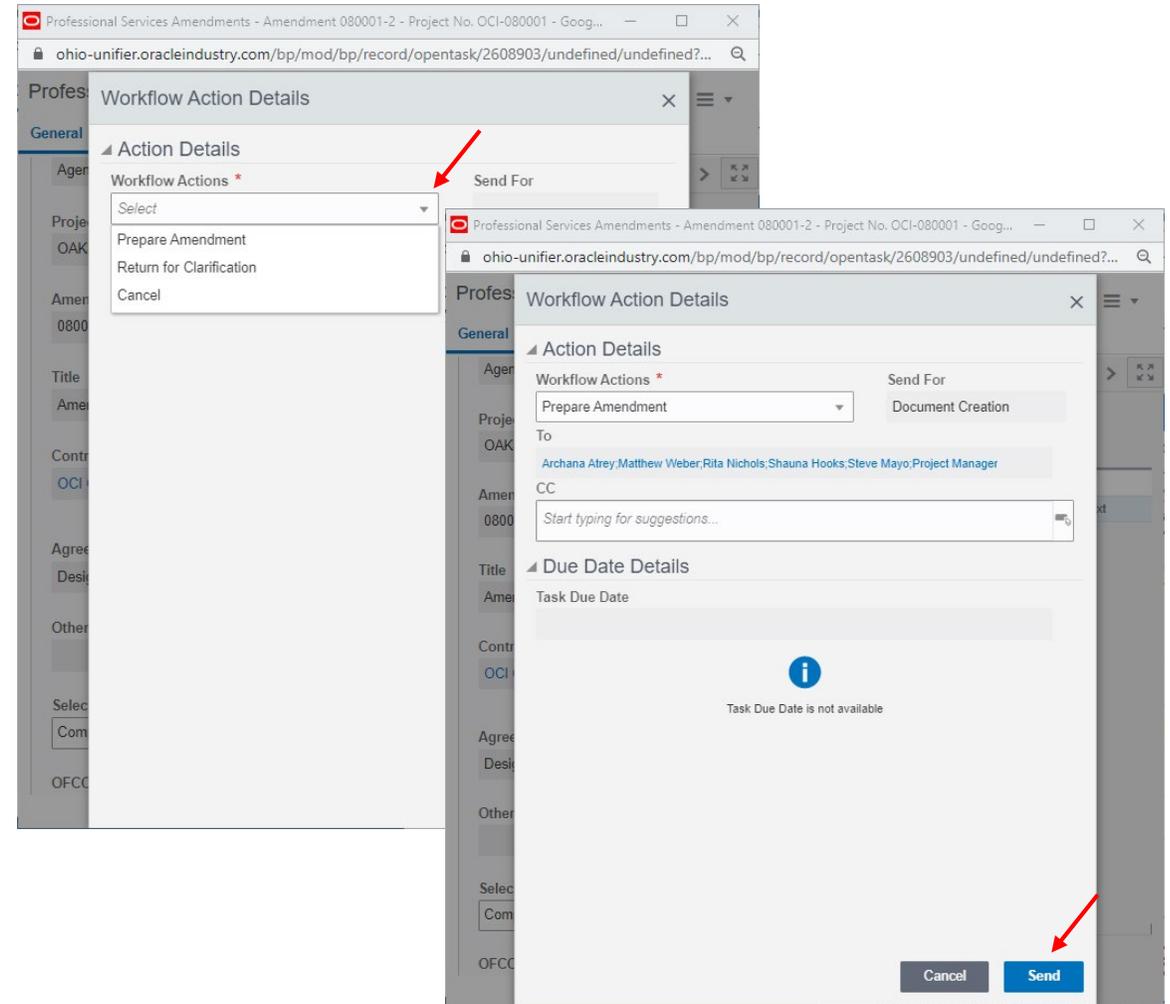
| | |
|------------------------------|--------------------------------|
| Agency General Projects Test | 04/28/2020 12:20 PM (UT) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |
| Design | No |

On the right side, there is a sidebar with two tabs: 'Attachments' and 'Comments'. The 'Attachments' tab is active and shows a list of published attachments. One attachment is visible: 'mmw-note.txt'. Above the attachments list, there are 'Send' and 'Save' buttons. Red arrows point to the 'Send' button and the 'Attachments' tab. A red box highlights the entire sidebar area.



Amendment Proposal Review (PM)

- ▶ If the record is ready to move forward to PM Document Creation
 - ▶ Choose **Prepare Amendment**
 - ▶ Click **Send**
- ▶ If record must be returned to the Associate for Update :
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Professional Services Amendment Document Creation (PM)



Professional Services Amendment Document Creation (PM)

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

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

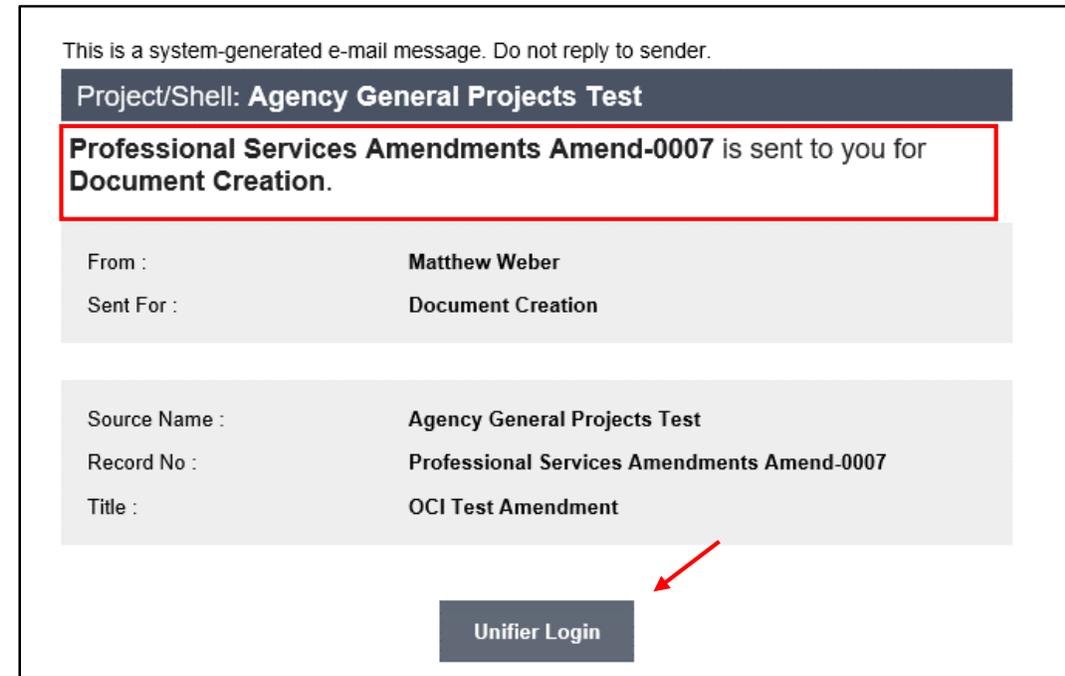
Project/Shell: Agency General Projects Test

Professional Services Amendments Amend-0007 is sent to you for Document Creation.

From : Matthew Weber
Sent For : Document Creation

Source Name : Agency General Projects Test
Record No : Professional Services Amendments Amend-0007
Title : OCI Test Amendment

[Unifier Login](#)



PM Document Creation

- ▶ Accept the Task

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

- Browser Tab:** Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome
- URL:** ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2609977?task_id=2609977&parent_id=0&view...
- Page Title:** Professional Services Amendments
- Navigation:** General (selected), Amendment Details, Purchase Order
- Task Details:**
 - From:** Matthew Weber
 - To:** Archana Atrey, Matthew Weber, Rita Nichols, Shauna Hooks, Stev...
 - Sent For:** Document Creation
- General Information:**

| | |
|------------------------------|--------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UT) |
| Project Location | Status |
- Attachments:** Published Attachments
 - mmw-note.txt
- Buttons:** Accept (highlighted with a red arrow), Decline, and a menu icon.

PM Document Creation

- ▶ Ensure all supporting documentation has been attached at some point in the amendment process
- ▶ Scroll down to review all fields in the General tab

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2609977/undefined/undefined?_uref=uuu1805413...

Professional Services Amendments Send Save

General Amendment Details Purchase Order

General

| | |
|------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |
| Design | No |

Attachments Comments

Published Attachments

| Name |
|--------------|
| mmw-note.txt |

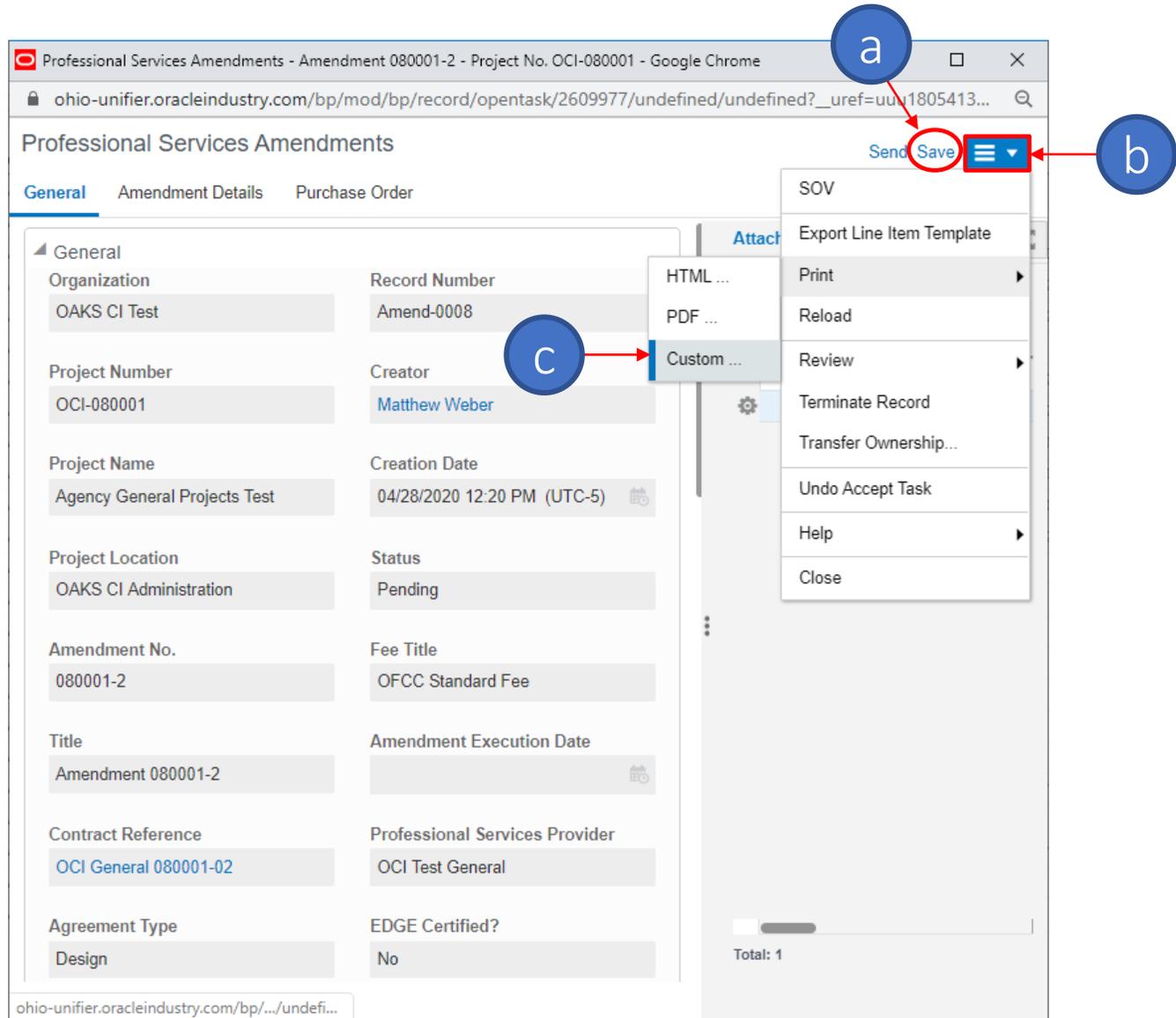
Total: 1



PM Document Creation

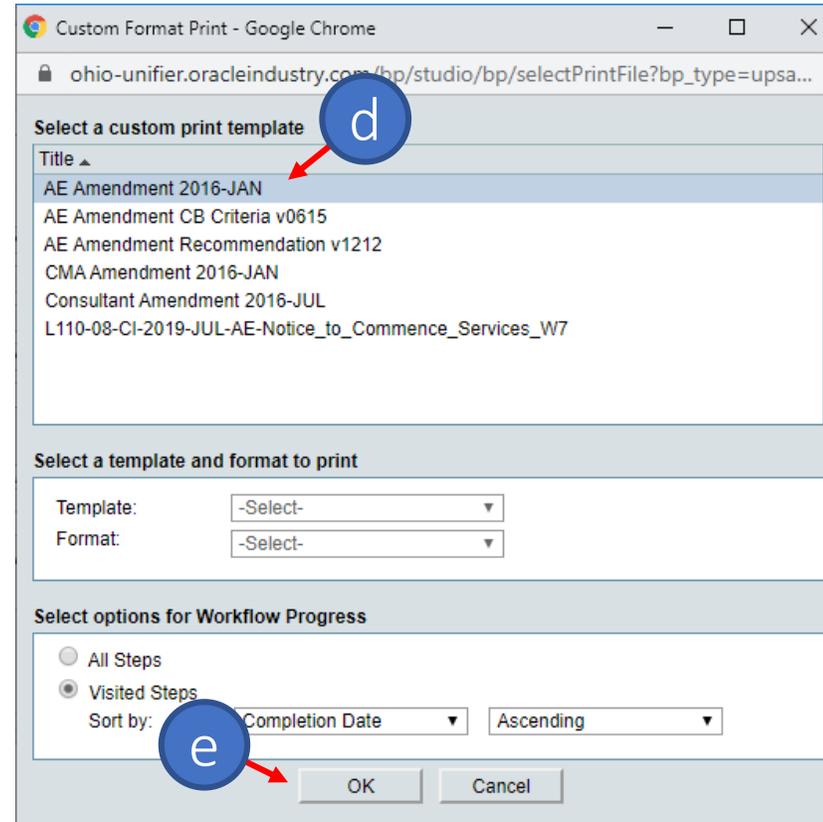
Once record is complete:

- a) Click **Save**
- b) Click the menu button
- c) **Print --> Custom**



PM Document Creation

- d) Select: Amendment
- e) Click : **OK**



PM Document Creation

- f) Double click on the document
- g) Click Enable Editing and update any necessary fields

***Once complete
Save the document
to your computer***

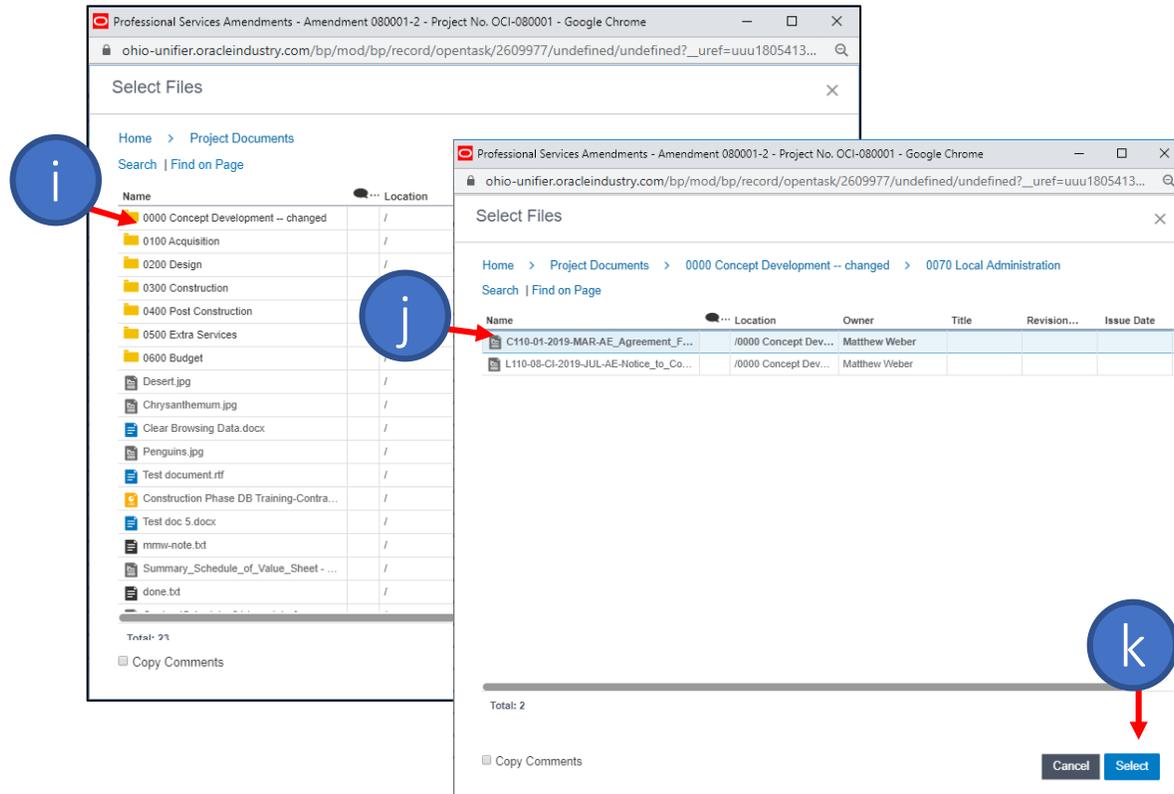
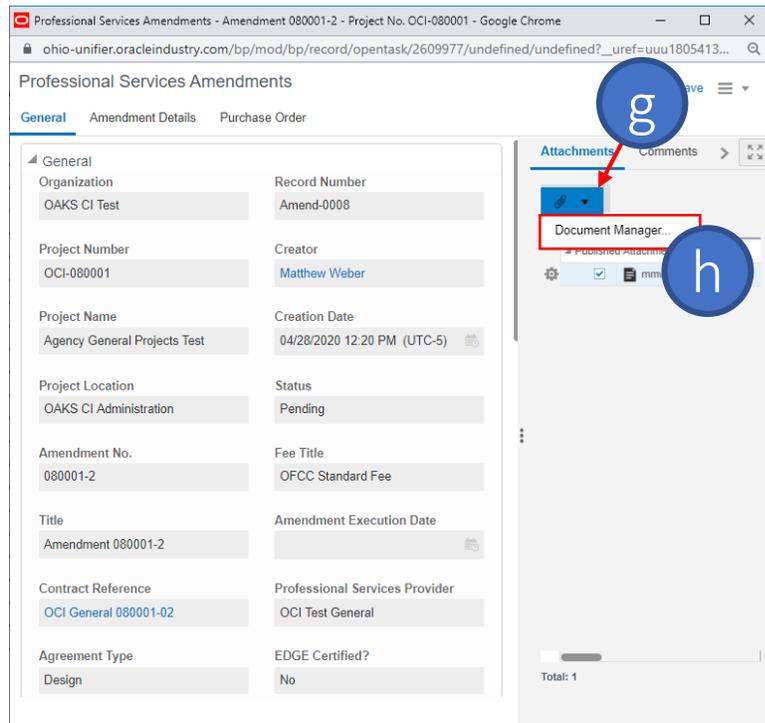
The screenshot illustrates the process of creating a PM document. The top window shows the 'Professional Services Amendments' interface with fields for Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Amendment No. (080001-2), and Title (Amendment 080001-2). The bottom window displays the 'Architect/Engineer Agreement Form' with project details such as Project Number (OCI-080001), Project Name (Agency General Projects Test), Owner (OAKS CI Test), and Contracting Authority (Ohio Facilities Construction Commission). A red arrow points to the 'Enable Editing' button in the bottom window, and another red arrow points to a document icon in the top window's file list.

PM Document Creation

Upload all documents to [Document Manager](#) prior to attaching to the record.

Once documents are uploaded, follow these steps:

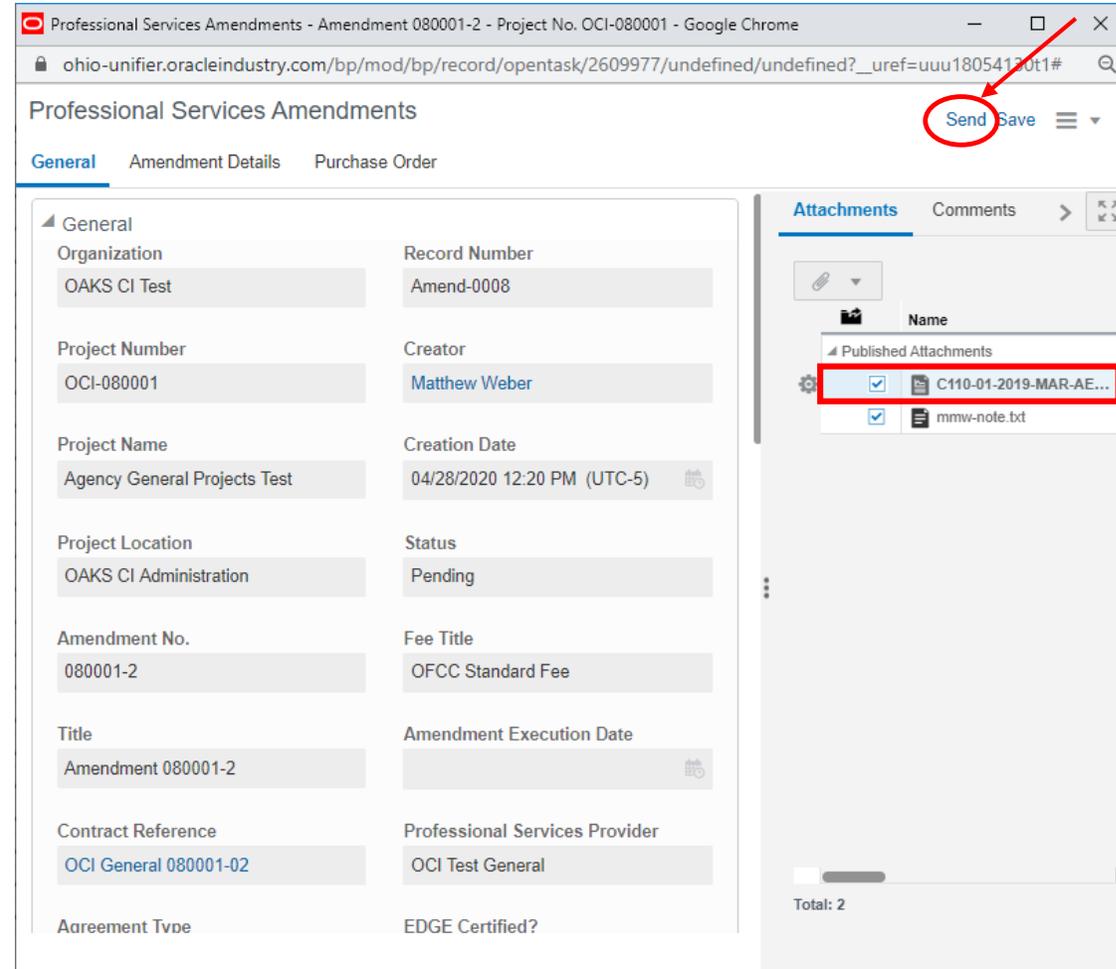
- g) Click the attachments button in the Attachments tab
- h) Choose Document Manger
- i) Navigate Document Manager to find your file
- j) Highlight the appropriate file
- k) Click Select



PM Document Creation

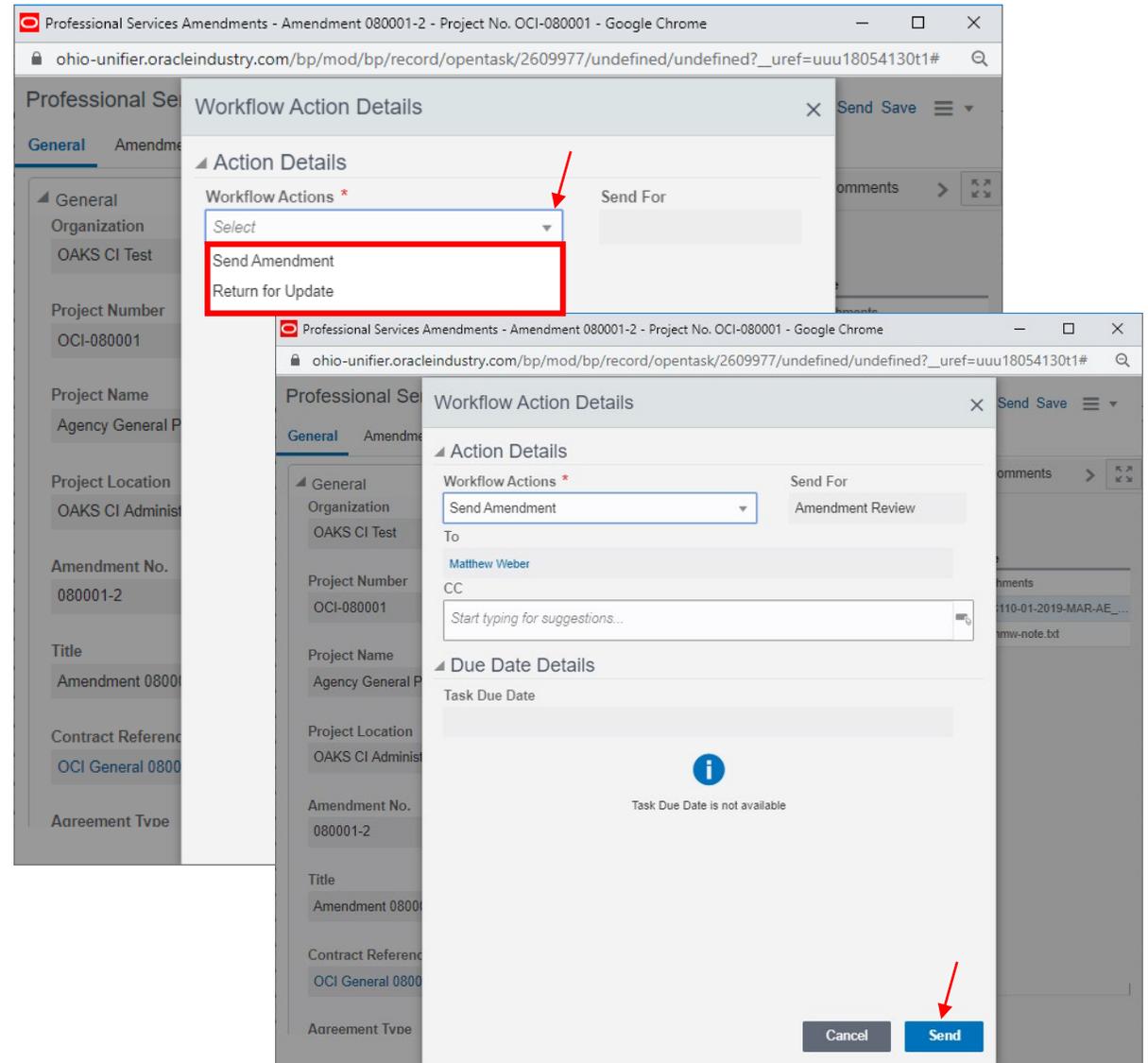
The screen will close:

- ▶ Your attachment will display under the Attachments tab
- ▶ When the record is ready to move forward, click the **Send** button



PM Document Creation

- ▶ If record is ready to move forward to A/E for Contract Review
 - ▶ Choose **Send Amendment**
 - ▶ Click **Send**
- ▶ If record must be returned for Update :
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Professional Services Amendment Contract Review (A/E)



Professional Services Amendment Contract Review (A/E)

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

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

Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0022 is sent to you for Contract Review.

From : Matthew Weber
Sent For : Contract Review

Source Name : Agency General Projects Test
Record No : Professional Services Amendments Amend-0007
Title : OCI Test Amendment

[Unifier Login](#)

Contract Review (A/E)

- ▶ Click Accept Task

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

- Browser Tab:** Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome
- URL:** ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610036?task_id=2610036&parent_id=0&viewOnl...
- Page Title:** Professional Services Amendments
- Navigation:** General (selected), Amendment Details, Purchase Order
- Task Details:**
 - From:** Matthew Weber
 - To:** Matthew Weber
 - Sent For:** Amendment Review
- General Information:**

| | |
|------------------------------|---------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC) |
- Attachments:**
 - Published Attachments table:

| Name |
|-------------------------|
| C110-01-2019-MAR-AE_... |
| mrv-note.txt |
 - Total: 2



Contract Review (A/E)

- ▶ Review information in the General tab
- ▶ Scroll down to review all fields
- ▶ Review attachments

The screenshot displays the 'Professional Services Amendments' web application. The browser title is 'Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610036/undefined/undefined?_uref=uuu180541...'. The page title is 'Professional Services Amendments' with 'Send Save' and a menu icon. The 'General' tab is selected and circled in red. The 'Attachments' tab is also circled in red. The 'General' tab contains the following fields:

| | |
|------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |

The 'Attachments' section shows a table of published attachments:

| Name |
|---|
| Published Attachments |
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... |
| <input checked="" type="checkbox"/> mmw-note.txt |

Total: 2



Contract Review (A/E)

- ▶ Once all information has been reviewed and the record is ready to move forward, click **Send**

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610036/undefined/undefined?_uref=uuu180541...

Professional Services Amendments

[General](#) [Amendment Details](#) [Purchase Order](#)

[Send](#) [Save](#) ☰

| | |
|---------------------------------------|--------------------------------|
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |
| Design | No |
| Other Description | Amount (\$) |
| | 5,000.00 |
| Selection Method | Line Item Total (\$) |
| Competitive Selection | 5,000.00 |
| | Difference (\$) |
| | 0.00 |

Attachments

Comments Linked >

Published Attachments

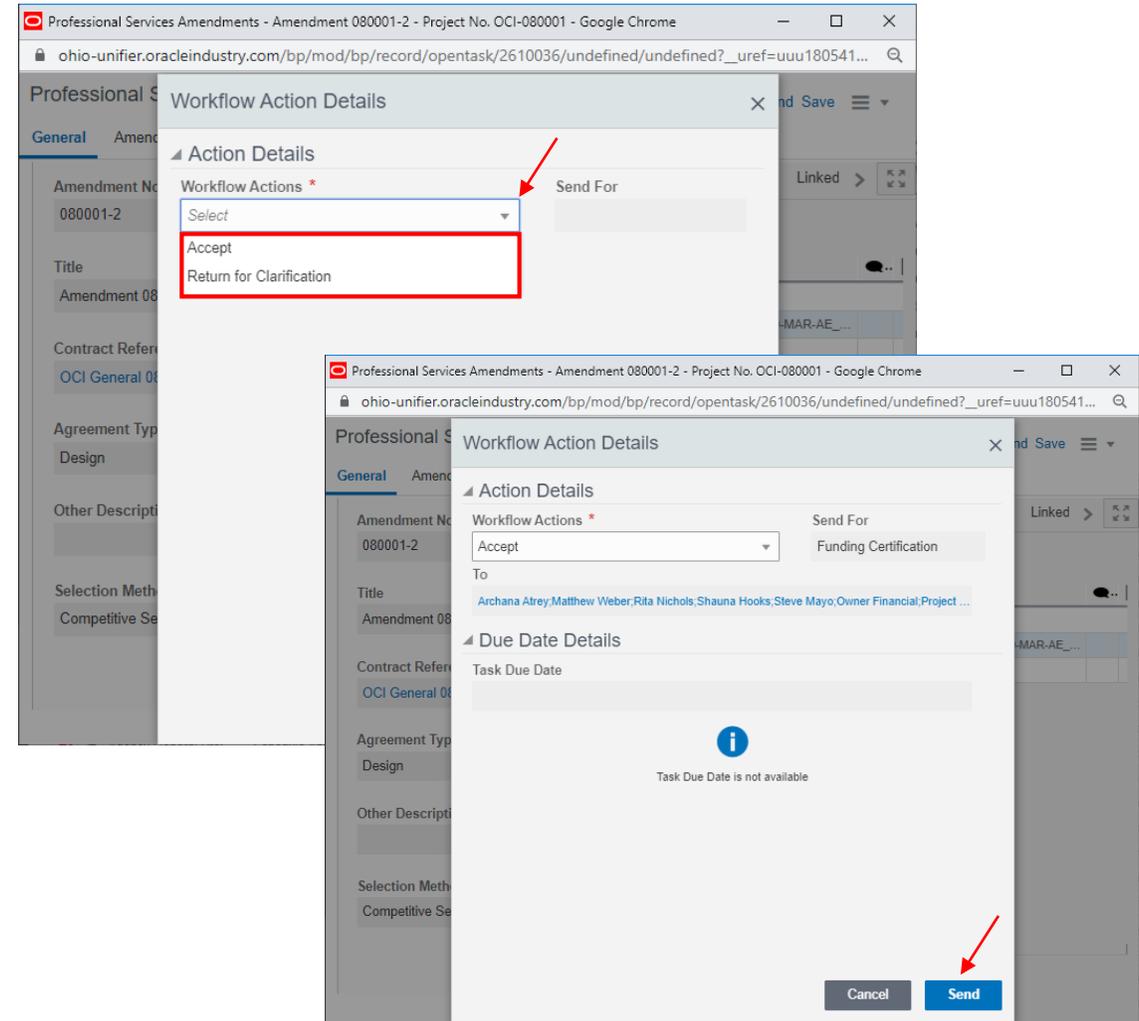
| | Name |
|-------------------------------------|-------------------------|
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... |
| <input checked="" type="checkbox"/> | mmw-note.txt |

Total: 2



Contract Review (A/E)

- ▶ If the record is ready to move forward to the PM for Funding Certification
 - ▶ Choose **Accept**
 - ▶ Click **Send**
- ▶ If record must be returned to the PM for Update:
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Professional Services Amendments Funding Certification (Owner Financial)



Professional Services Amendments Funding Certification (Owner Financial)

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



Professional Services Amendments Funding Certification (Owner Financial)

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

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

Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for Funding Certification.

From : **Matthew Weber**
Sent For : **Funding Certification**

Source Name : **Agency General Projects Test**
Record No : **Professional Services Amendments Amend-0007**
Title : **OCI Test Amendment**

[Unifier Login](#)



Funding Certification (Owner Financial)

- ▶ Click: Accept Task

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610110?task_id=2610110&parent_id=0&viewOnly=0&project_id=10...

Professional Services Amendments → [Accept](#) [Decline](#) ☰

[General](#) [Amendment Details](#) [Purchase Order](#) **Professional Services Amendments**

Task Details

From: Matthew Weber

To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Owner ...

Sent For: Funding Certification

General

| | |
|--|--|
| Organization: OAKS CI Test | Record Number: Amend-0008 |
| Project Number: OCI-080001 | Creator: Matthew Weber |
| Project Name: Agency General Projects Test | Creation Date: 04/28/2020 12:20 PM (UTC-5) |

Attachments [Comments](#) [Linked Records](#) ☰

Published Attachments

| | Name | | Title |
|-------------------------------------|-------------------------|--|-------|
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... | | |
| <input checked="" type="checkbox"/> | mmw-note.txt | | |

Total: 2



Funding Certification (Owner Financial)

- ▶ Review record
- ▶ **Create the Purchase Order in OAKS FIN or your financial system of record**
- ▶ Open the **Purchase Order** tab

The screenshot displays a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610110/undefined/undefined?_uref=uuu18054130t1`. The page title is "Professional Services Amendments" and it features a navigation menu with tabs for "General", "Amendment Details", and "Purchase Order". The "Purchase Order" tab is highlighted with a red circle and a red arrow. A red bracket on the left side of the "General" tab area encompasses the following fields:

| General | |
|------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Accepted |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |

On the right side of the screen, the "Attachments" section is visible, showing a list of published attachments:

| Name | Title |
|-------------------------|-------|
| C110-01-2019-MAR-AE_... | |
| mmw-note.txt | |

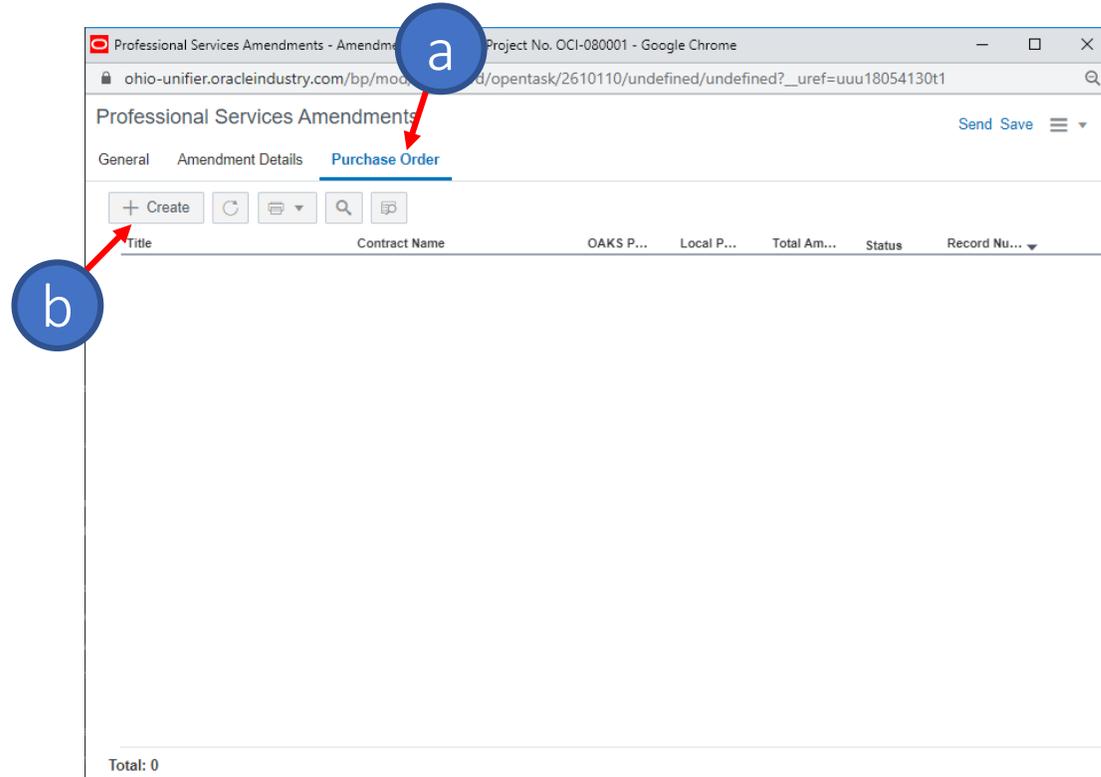
The total number of attachments is indicated as "Total: 2".



Funding Certification (Owner Financial)

Record the Purchase Order information in this record:

- a) Click the **Purchase Order** tab
- b) Click **Create**



Funding Certification (Owner Financial)

c) Complete the General block

- ▶ Add an appropriate Title
- ▶ Choose the Status, PO Purpose, and Financial System of Record

d) Choose the Vendor with the Select button

e) Highlight Vendor name

f) Click Select

Keep OAKS PO Amount block empty

The screenshot shows the 'Create New Purchase Orders' web application. The 'General' block is visible, with the following fields:

- Organization: OAKS CI Test
- Record Number: [Empty]
- Project Number: OCI-080001
- Creator: Matthew Weber
- Project Name: Agency General Projects Te
- Creation Date: [Empty]
- Project Location: OAKS CI Administration
- Status: Approved
- Title: Matt's Consulting OCI-0008
- PO Purpose: Amendments
- Vendor: Zenith System...
- Financial System of Record: OAKS FIN

The 'Project Vendors' modal window is open, showing a table of vendors:

| OAKS Business Unit | Vendor Name | OAKS Ven... | Local Ven... | City | Status |
|--------------------|-------------------------------------|-------------|--------------|-----------------|--------|
| SFC01 | ENC Type Encumbrances | ENC | | Columbus | Active |
| SOC01 | Fanning/Hovey Associations, Inc. | | | Dublin | Active |
| OCI01 | OCI Migration Inc | | | Columbus | Active |
| OCI01 | OCI Test General | 0000079990 | 12 | Columbus | Active |
| SFC01 | Ohio Facilities Construction Com... | SFC01 | | Columbus | Active |
| YSU01 | Zenith Systems, LLC | 009999 | 09008080 | Bedford Heights | Active |

Red circles and arrows labeled c, d, e, and f indicate the steps for completing the form and selecting a vendor:

- c: A red circle labeled 'c' is positioned to the left of the 'General' block, with a red line pointing to the 'Title' field.
- d: A red circle labeled 'd' is positioned over the 'Vendor' dropdown menu, with a red arrow pointing to the 'Zenith System...' option.
- e: A red circle labeled 'e' is positioned over the 'Zenith Systems, LLC' row in the 'Project Vendors' table, with a red arrow pointing to the row.
- f: A red circle labeled 'f' is positioned over the 'Select' button at the bottom right of the 'Project Vendors' modal, with a red arrow pointing to the button.



Funding Certification (Owner Financial)

***Record the Purchase Order
in this record:***

- g) Open **PO Distribution Lines Tab**
- h) Click **Add**

Create New Purchase Orders

General **PO Distribution Lines**

Add Actions

No. Fund Code

Total Amount : 0.00
Total: 0

Line Item Details

General

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

Fund Name
OCI Test Money

Short Description *
OCI Test Money Funds

Amount (\$) *
5,000.00

Financial System of Record
OAKS FIN

Cancel Save



Funding Certification (Owner Financial)

Record the Purchase Order in this record:

- i) Click button to select **Fund Code**
- j) Highlight Fund
- k) Click **Select**
- l) Complete all required fields
- m) Click **Save**

The screenshot shows the 'Create New Purchase Orders' application. The main window is titled 'Create New Purchase Orders - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1003/0/1/gen_ps_amen...'. The page has tabs for 'General' and 'PO Distribution Lines'. The 'PO Distribution Lines' tab is active, showing a table with columns 'No.', 'Fund Code', and 'Amount'. Below the table is a 'Total Amount' field showing '0.00' and a 'Total: 0' label. A 'Fund Picker' window is open, showing a table with columns 'Fund Code', 'Fund Name', and 'Agenc'. The table contains two rows: 'OCI-Other-TestFund-0-OCI-1' with 'OCI Test Money' and 'OCI', and 'OCI-Other-TestFund-0-OCI-Wave4' with 'OCI Wave 4 Test Fund' and 'OCI'. Below the table is a 'Total: 2' label and 'Cancel' and 'Select' buttons. The 'Line Item Details' window is also open, showing the 'General' tab with fields for 'Fund Code *', 'Fund Name', 'Short Description *', 'Amount (\$) *', and 'Financial System of Record'. The 'Fund Code' field contains 'OCI-Other-TestFund-0-OCI-1', 'Fund Name' is 'OCI Test Money', 'Short Description' is 'OCI Test Money Funds', 'Amount' is '5,000.00', and 'Financial System of Record' is 'OAKS FIN'. Below the fields are 'Cancel' and 'Save' buttons. Red arrows and blue circles labeled i through m point to specific UI elements: i) 'Add' button, j) 'OCI-Other-TestFund-0-OCI-Wave4' row, k) 'Select' button, l) 'Fund Code' field, m) 'Save' button.



Funding Certification (Owner Financial)

Complete Record:

- n) Click: **General** tab
- o) Type the OAKS PO Amount
- p) Fill out the rest of the OAKS PO No., OAKS PO Date, and other fields in the PO details tab as appropriate

The screenshot shows a web browser window titled 'Create New Purchase Orders - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1003/0/1/gen_ps_amen...'. The page title is 'Create New Purchase Orders' with 'Submit Save' and a menu icon. There are two tabs: 'General' (circled in red) and 'PO Distribution Lines'. A blue circle with the letter 'n' has a red arrow pointing to the 'General' tab. Below the tabs is the 'PO Details' section with a note: 'The OAKS PO No. should be a 10 digit number ex. 0000007825'. The form fields are as follows:

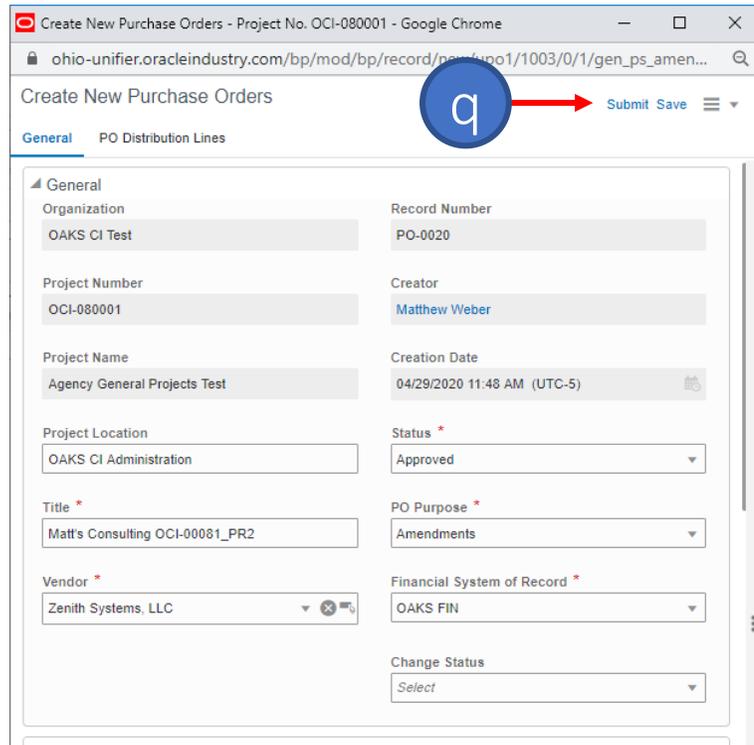
| | | | |
|------------------------|-----------------------------|----------------------|----------|
| OAKS PO No. | 01234567 | OAKS PO Amount (\$) | 5,000.00 |
| OAKS PO Date | 04/29/2020 05:00 PM (UTC-5) | | |
| Date Dispatched | 04/29/2020 05:00 PM (UTC-5) | | |
| Created by Integration | N/A | | |
| Local PO No. | | Local PO Amount (\$) | 0.00 |
| Local PO Date | MM/DD/YYYY HH:MM AM | | |
| Date Dispatched | MM/DD/YYYY HH:MM AM | | |
| | | Total Amount (\$) | 5,000.00 |
| | | Line Item Total (\$) | 5,000.00 |
| | | Difference (\$) | 0.00 |

A blue circle with the letter 'o' is positioned to the right of the 'OAKS PO Amount (\$)' field. A blue circle with the letter 'p' is positioned to the left of the 'Local PO No.' field. A red bracket on the left side of the form groups the 'Local PO No.', 'Local PO Date', and 'Date Dispatched' fields.



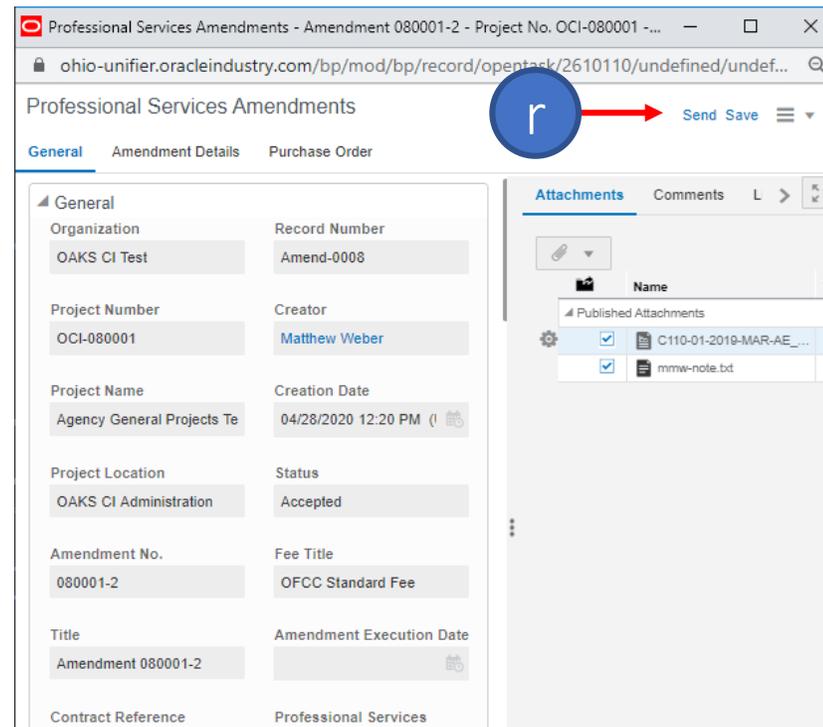
Funding Certification (Owner Financial)

- q. Click **Submit**, the PO window will close and take you back to the Amendment
- r. When the record is ready to move forward, click **Send**



The screenshot shows a web browser window titled "Create New Purchase Orders - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1003/0/1/gen_ps_amen...". The page title is "Create New Purchase Orders". There are two tabs: "General" and "PO Distribution Lines". A red circle with the letter "q" is around the "Submit" button, with a red arrow pointing to it. The form fields are as follows:

| | |
|---------------------------------|------------------------------|
| Organization | Record Number |
| OAKS CI Test | PO-0020 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/29/2020 11:48 AM (UTC-5) |
| Project Location | Status * |
| OAKS CI Administration | Approved |
| Title * | PO Purpose * |
| Matt's Consulting OCI-00081_PR2 | Amendments |
| Vendor * | Financial System of Record * |
| Zenith Systems, LLC | OAKS FIN |
| | Change Status |
| | Select |



The screenshot shows a web browser window titled "Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - ...". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610110/undefined/undef...". The page title is "Professional Services Amendments". There are three tabs: "General", "Amendment Details", and "Purchase Order". A red circle with the letter "r" is around the "Send" button, with a red arrow pointing to it. The form fields are as follows:

| | |
|----------------------------|--------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Te | 04/28/2020 12:20 PM (l) |
| Project Location | Status |
| OAKS CI Administration | Accepted |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services |

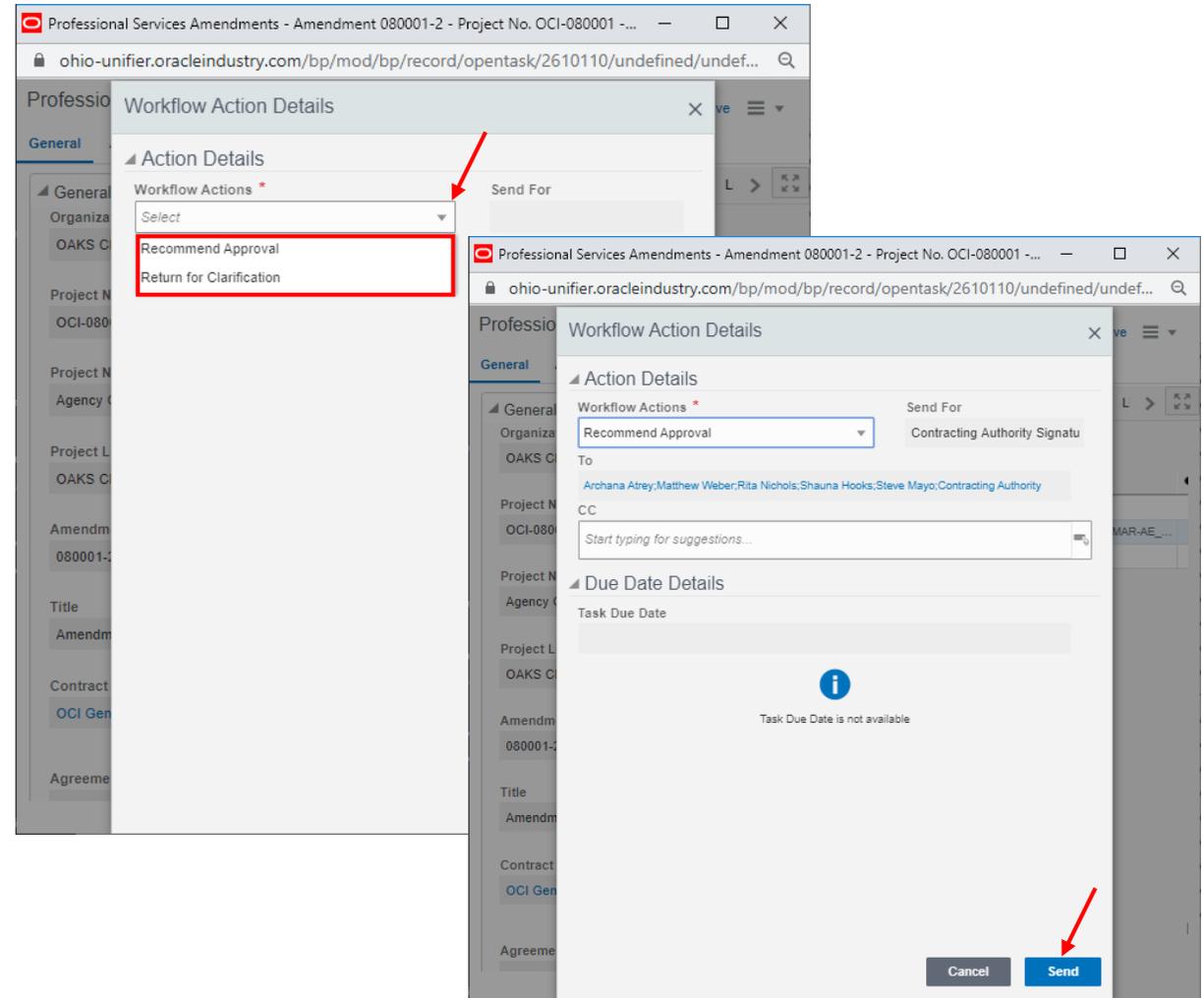
On the right side, there is an "Attachments" section with a table of published attachments:

| Published Attachments | Name |
|-------------------------------------|-------------------------|
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... |
| <input checked="" type="checkbox"/> | mwa-note.txt |



Funding Certification (Owner Financial)

- ▶ If record is ready to move forward to Contracting Authority for Signature
 - ▶ Choose **Recommend Approval**
 - ▶ Click **Send**
- ▶ If record must be returned for Update
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**



Professional Services Amendments Contracting Authority Signature



Professional Services Amendments Contracting Authority Signature

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

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

Project/Shell: Agency General Projects Test

Professional Services Agreements Agree-0019 is sent to you for Contracting Authority Signature.

From : Matthew Weber
Sent For : Contracting Authority Signature

Source Name : Agency General Projects Test
Record No : Professional Services Amendments Amend-0007
Title : OCI Test Amendment

[Unifier Login](#)



Contracting Authority Signature

- ▶ Click: Accept Task

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

- Browser Tab:** Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome
- URL:** ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610206?task_id=2610206&parent_id=0&viewO...
- Page Title:** Professional Services Amendments
- Navigation:** General (selected), Amendment Details, Purchase Order
- Task Details:**
 - From:** Matthew Weber
 - To:** Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Co...
 - Sent For:** Contracting Authority Signature
- General Information:**

| | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Accepted |
- Attachments:** Published Attachments table with 2 items:

| Name | | | |
|-------------------------|-------------------------------------|--|--|
| C110-01-2019-MAR-AE_... | <input checked="" type="checkbox"/> | | |
| mww-note.bt | <input checked="" type="checkbox"/> | | |



Contracting Authority Signature

- ▶ View the attached documents
- ▶ Print and sign the amendment, scan copy to your computer
- ▶ Attach signed amendment to record

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610206/undefined/undefined?__uref=uuu18054...

Professional Services Amendments Send Save

General Amendment Details Purchase Order

General

| | |
|------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Accepted |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |

Attachments Comments Linked Reco

| | Name | | | |
|-------------------------------------|-------------------------|--|--|--|
| Published Attachments | | | | |
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... | | | |
| <input checked="" type="checkbox"/> | mmw-note.txt | | | |

Total: 2



Contracting Authority Signature

Upload all documents to [Document Manager](#) prior to attaching to the record.
Once documents are uploaded, follow these steps:

- Click the attachment button under Attachments
- Choose Document Manger
- Navigate Document Manager to find your file
- Highlight the appropriate file
- Click Select

The screenshots illustrate the process of attaching a document to a record. The first screenshot shows the 'Professional Services Amendments' record page with the 'Attachments' button highlighted. The second screenshot shows the 'Document Manager' dialog box. The third screenshot shows the 'Select Files' dialog box with a file highlighted. The fourth screenshot shows the 'Select Files' dialog box with a file highlighted. The fifth screenshot shows the 'Select' button in the 'Select Files' dialog box.

Step a: Click the attachment button under Attachments.

Step b: Choose Document Manger.

Step c: Navigate Document Manager to find your file.

Step d: Highlight the appropriate file.

Step e: Click Select.



Contracting Authority Signature

The screen will close:

- ▶ The attached document will display under the **Attachments** tab
- ▶ When the record is ready to move forward, click **Send**

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610206/undefined/undefined?__uref=uuu18054...

Professional Services Amendments → Send Save

General Amendment Details Purchase Order

General

| | |
|------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Accepted |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |

Attachments Comments Linked Reco

| Name |
|---|
| Published Attachments |
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... |
| <input checked="" type="checkbox"/> mmw-note.txt |

Total: 2



Contracting Authority Signature

- ▶ If record is ready to move forward to Notice to Commence Services
 - ▶ Choose **Approve**
 - ▶ Click **Send**
- ▶ If record must be returned for Update
 - ▶ Choose **Return for Clarification**
 - ▶ Click **Send**

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610206/undefined/undefined?__uref=uuu18054...

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

Workflow Action Details

Send Save

General Amendment D

Action Details

Workflow Actions *

Select

Approve

Return for Clarification

Send For

Linked Reco

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610206/undefined/undefined?__uref=uuu18054...

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

Workflow Action Details

Send Save

General Amendment D

Action Details

Workflow Actions *

Approve

Send For

Notice to Commence Service

To

Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Manager

CC

Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel

Send



Professional Services Amendment Notice to Commence Services (PM)



Professional Services Amendment Notice to Commence Services (PM)

- ▶ Project Manager Receives Email
- ▶ Click on the “Unifier Login” button to access the task

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

Project/Shell: Agency General Projects Test

Professional Services Amendments Amend-0007 sent to you for Notice to Commence Services.

From : **Matthew Weber**
Sent For : **Notice to Commence Services**

Source Name : **Agency General Projects Test**
Record No : **Professional Services Amendments Amend-0007**
Title : **OCI Test Amendment**

[Unifier Login](#)



Notice to Commence Services (PM)

- ▶ Click Accept Task

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610218?task_id=2610218&parent_id=0&viewOnly=0&pr...`. The page title is "Professional Services Amendments". A red arrow points to the "Accept" button in the top right corner. The page is divided into several sections:

- Task Details:**
 - From: Matthew Weber
 - To: Arohana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Manager
 - Sent For: Notice to Commence Services
- General:**
 - Organization: OAKS CI Test
 - Record Number: Amend-0008
 - Project Number: OCI-080001
 - Creator: Matthew Weber
 - Project Name: Agency General Projects Test
 - Creation Date: 04/28/2020 12:20 PM (UTC-5)
 - Project Location: OAKS CI Administration
 - Status: Approved
- Attachments:** A table showing published attachments:

| | Name | Title |
|-------------------------------------|-------------------------|-------|
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... | |
| <input checked="" type="checkbox"/> | mmw-note.txt | |



Notice to Commence Services (PM)

- ▶ Review attached documents, ensure that all signatures have been acquired

The screenshot displays a web application interface for 'Professional Services Amendments'. The browser title is 'Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610218/undefined/undefined?__uref=uuu18054130t1'. The page title is 'Professional Services Amendments' with 'Send Save' and a menu icon. The main content is divided into two sections: 'General' and 'Attachments'.

General Section:

| | | | |
|--------------------|------------------------------|--------------------------------|-----------------------------|
| Organization | OAKS CI Test | Record Number | Amend-0008 |
| Project Number | OCI-080001 | Creator | Matthew Weber |
| Project Name | Agency General Projects Test | Creation Date | 04/28/2020 12:20 PM (UTC-5) |
| Project Location | OAKS CI Administration | Status | Approved |
| Amendment No. | 080001-2 | Fee Title | OFCC Standard Fee |
| Title | Amendment 080001-2 | Amendment Execution Date * | MM/DD/YYYY HH:MM AM |
| Contract Reference | OCI General 080001-02 | Professional Services Provider | OCI Test General |
| Amendment Type | | EDGE Certified? | |

Attachments Section:

| | Name | Title |
|-------------------------------------|-------------------------|-------|
| Published Attachments | | |
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... | |
| <input checked="" type="checkbox"/> | mww-note.txt | |

Total: 2



Notice to Commence Services (PM)

Once record is complete:

- a) Click **Save**
- b) Click the menu button
- c) **Print --> Custom**

The screenshot shows the Oracle Professional Services Amendments interface. The browser title is "Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2609977/undefined/undefined?_uref=uu1805413...". The page title is "Professional Services Amendments". The tabs are "General", "Amendment Details", and "Purchase Order". The "General" tab is selected. The "Save" button is circled in red and labeled 'a'. The menu button (three horizontal lines) is circled in red and labeled 'b'. The "Print" option in the dropdown menu is highlighted, and the "Custom ..." option is also highlighted, with a red arrow pointing to it labeled 'c'. The form fields are as follows:

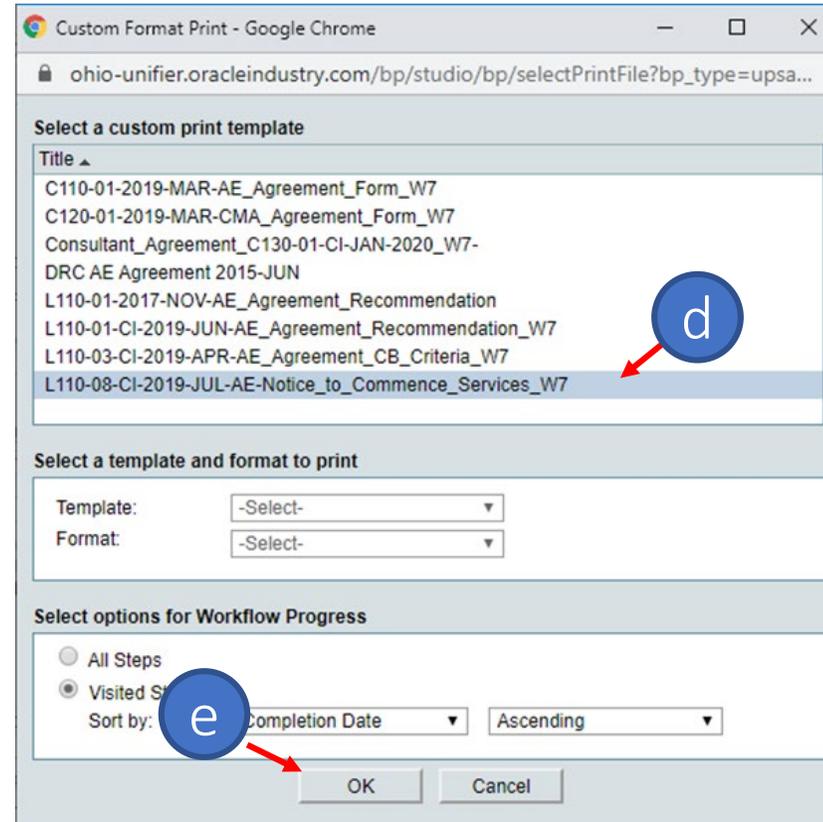
| | |
|------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |
| Design | No |

Total: 1



Notice to Commence Services (PM)

- d) Select: AE Notice to Commence Services
- e) Click : **OK**



Notice to Commence Services (PM)

- f) Double click on the document
- g) Click Enable Editing and update any necessary fields

***Once complete
Save the document
to your computer***

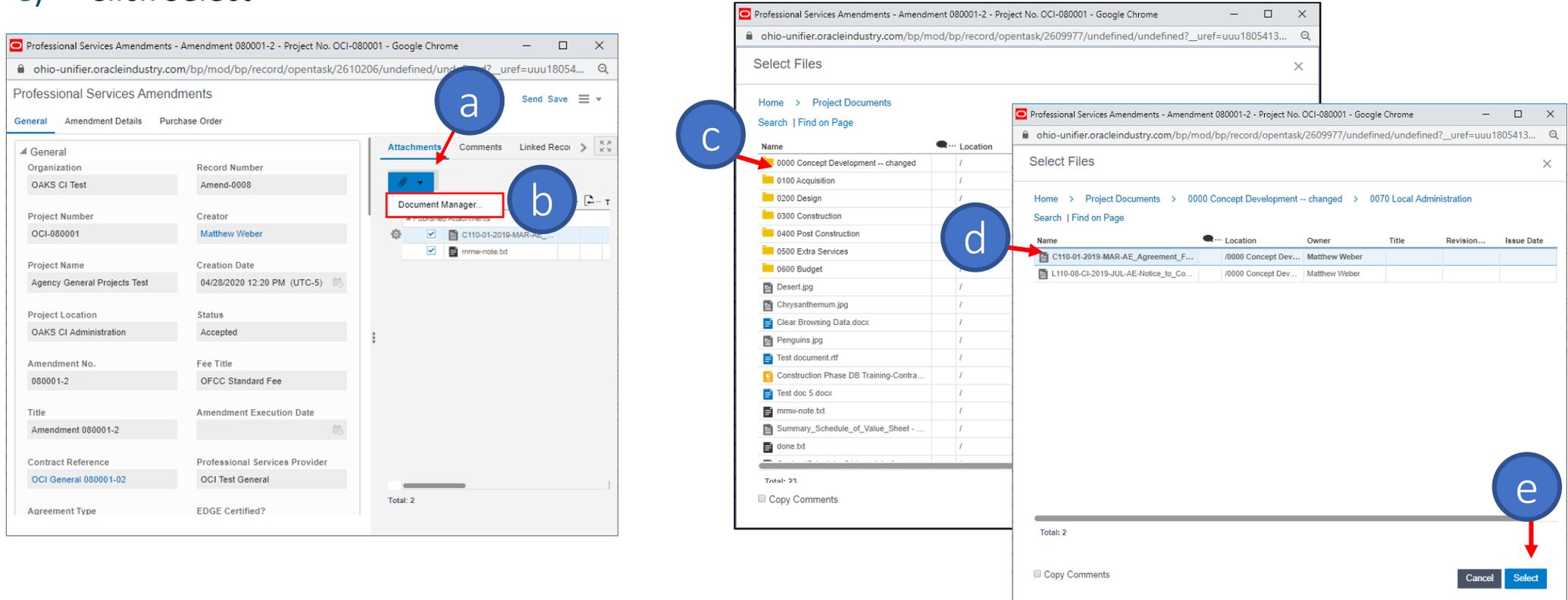
The image shows two overlapping screenshots. The top screenshot is a web browser window displaying a 'Professional Services Amendments' form. The form has tabs for 'General', 'Amendment Details', and 'Purchase Order'. The 'General' tab is active, showing fields for Organization (OAKS CI Test), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Amendment No. (080001-2), Title (Amendment 080001-2), and Contract Reference (OCI Gener...). A red arrow points to a file icon in the bottom left corner of the form. The bottom screenshot is a Microsoft Word document titled 'AE+Amendment+2016-JAN - Protected... - Saved'. The document is in 'PROTECTED VIEW' and contains the text of an 'Architect/Engineer Amendment Form' for the State of Ohio. The form includes an 'Amendment #' section with fields for Project Number (OCI-080001), Project Name (Agency General Projects Test), and Site Address. A red arrow points to the 'Enable Editing' button in the top right corner of the Word window. A blue circle with a white 'f' is overlaid on the top right of the Word window, and another blue circle with a white 'g' is overlaid on the top right of the browser window.



Notice to Commence Services (PM)

Upload all documents to [Document Manager](#) prior to attaching to the record. Once documents are uploaded, follow these steps:

- a) Click the attachment button under Attachments
- b) Choose Document Manger
- c) Navigate Document Manager to find your file
- d) Highlight the appropriate file
- e) Click Select



Notice to Commence Services (PM)

The screen will close:

- ▶ The attached document will display under the **Attachments** tab
- ▶ When the record is ready to move forward, click **Send**

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610206/undefined/undefined?__uref=uuu18054...

Professional Services Amendments Send Save

General Amendment Details Purchase Order

General

| | |
|------------------------------|--------------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Accepted |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | |
| Contract Reference | Professional Services Provider |
| OCI General 080001-02 | OCI Test General |
| Agreement Type | EDGE Certified? |

Attachments Comments Linked Reco

| | Name | | |
|-------------------------------------|-------------------------|--|--|
| Published Attachments | | | |
| <input checked="" type="checkbox"/> | C110-01-2019-MAR-AE_... | | |
| <input checked="" type="checkbox"/> | mmw-note.txt | | |

Total: 2



Notice to Commence Services (PM)

- ▶ Verify Workflow: **Distribute**
- ▶ Click **CC** to carbon copy other users in the project
- ▶ Click **Send** to Distribute
- ▶ *The record will now go to the A/E for Acknowledgement*

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610218/undefined/undefined?__uref=uuu18054130t1

Professional Services Amendments Workflow Action Details

General Amendment Details Project Details

General

Organization
OAKS CI Test

Project Number
OCI-080001

Project Name
Agency General Projects Test

Project Location
OAKS CI Administration

Amendment No.
080001-2

Title
Amendment 080001-2

Contract Reference
OCI General 080001-02

Amendment Type

Workflow Action Details

Action Details

Workflow Actions *
Distribute

Send For
Acknowledgement

To
Matthew Weber

CC
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send



Professional Services Amendment Acknowledgement (A/E)



Professional Services Amendment Acknowledgement (A/E)

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

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

Project/Shell: Agency General Projects Test

Professional Services Amendments Amend-0007 is sent to you for Acknowledgement.

From : **Matthew Weber**
Sent For : **Acknowledgement**
Task Due Date : **02/18/2020 07:12 AM (UTC-8)**

Source Name : **Agency General Projects Test**
Record No : **Professional Services Amendments Amend-0007**
Title : **OCI Test Amendment**

[Unifier Login](#)



Acknowledgement (A/E)

- ▶ Click: Accept Task

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610233?task_id=2610233&parent_id=0&viewOnly=0&project_id=1003&model=upsa2&_uref=u...

Professional Services Amendments

[Accept](#) [Decline](#) ☰

[General](#) [Amendment Details](#) [Purchase Order](#)

Task Details

From: Matthew Weber

To: Matthew Weber

Sent For: Acknowledgement

General

| | |
|--|--|
| Organization: OAKS CI Test | Record Number: Amend-0008 |
| Project Number: OCI-080001 | Creator: Matthew Weber |
| Project Name: Agency General Projects Test | Creation Date: 04/28/2020 12:20 PM (UTC-5) |
| Project Location: OAKS CI Administration | Status: Approved |
| Amendment No.: 080001-2 | Fee Title: OFCC Standard Fee |

Attachments

| Name | Title | Pu |
|---|-------|----|
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... | | 1 |
| <input checked="" type="checkbox"/> mmw-note.bt | | 1 |

Total: 2

Acknowledgement (A/E)

- ▶ Click: Accept Task

Professional Services Amendments - Amendment 080001-2 - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610233?task_id=2610233&parent_id=0&viewOnly=0&project_id=1003&model=upsa2&_uref=u...

Professional Services Amendments

[Accept](#) [Decline](#) ☰

[General](#) [Amendment Details](#) [Purchase Order](#)

Task Details

From: Matthew Weber

To: Matthew Weber

Sent For: Acknowledgement

General

| | |
|--|--|
| Organization: OAKS CI Test | Record Number: Amend-0008 |
| Project Number: OCI-080001 | Creator: Matthew Weber |
| Project Name: Agency General Projects Test | Creation Date: 04/28/2020 12:20 PM (UTC-5) |
| Project Location: OAKS CI Administration | Status: Approved |
| Amendment No.: 080001-2 | Fee Title: OFCC Standard Fee |

Attachments

| Name | Title | Pu |
|---|-------|----|
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... | | 1 |
| <input checked="" type="checkbox"/> mmw-note.bt | | 1 |

Total: 2

Acknowledgement (A/E)

- a) Review record details
- b) Review attachments
- c) When the record is ready to move forward, click **Send**

The screenshot shows a web browser window displaying the 'Professional Services Amendments' record for 'Amendment 080001-2'. The interface includes a navigation bar with 'General', 'Amendment Details', and 'Purchase Order' tabs. The 'General' tab is active, showing a form with the following details:

| | |
|------------------------------|---------------------------|
| Organization | Record Number |
| OAKS CI Test | Amend-0008 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 04/28/2020 12:20 PM (UTC) |
| Project Location | Status |
| OAKS CI Administration | Approved |
| Amendment No. | Fee Title |
| 080001-2 | OFCC Standard Fee |
| Title | Amendment Execution Date |
| Amendment 080001-2 | 04/29/2020 05:00 PM (UTC) |

On the right side, there is an 'Attachments' section with a table of published attachments:

| Name |
|---|
| Published Attachments |
| <input checked="" type="checkbox"/> C110-01-2019-MAR-AE_... |
| <input checked="" type="checkbox"/> mmw-note.txt |

Annotations on the screenshot:

- a**: A red bracket on the left side of the 'General' tab points to the record details form.
- b**: A red arrow points from a blue circle 'b' to the 'Attachments' tab.
- c**: A red arrow points from a blue circle 'c' to the 'Send' button in the top right corner.



Acknowledgement (A/E)

- ▶ Verify Workflow Action: **Acknowledge**
- ▶ Click **CC** to carbon copy other users in the project
- ▶ Click **Send** to Acknowledge
- *The record will now be at the End of the Professional Services Amendment Process*

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2610233/undefined/undefined?__uref=uuu18054130t1`. A modal dialog titled "Workflow Action Details" is open. It has a "General" tab selected. Under "Action Details", the "Workflow Actions" dropdown is set to "Acknowledge" and the "Send For" dropdown is set to "End". The "CC" field contains the name "Matthew Weber" with a close button (X) and a search icon. A red dashed arrow points to the "CC" field. At the bottom right of the dialog, there are two buttons: "Cancel" and "Send". A red solid arrow points to the "Send" button.





Design Reviews



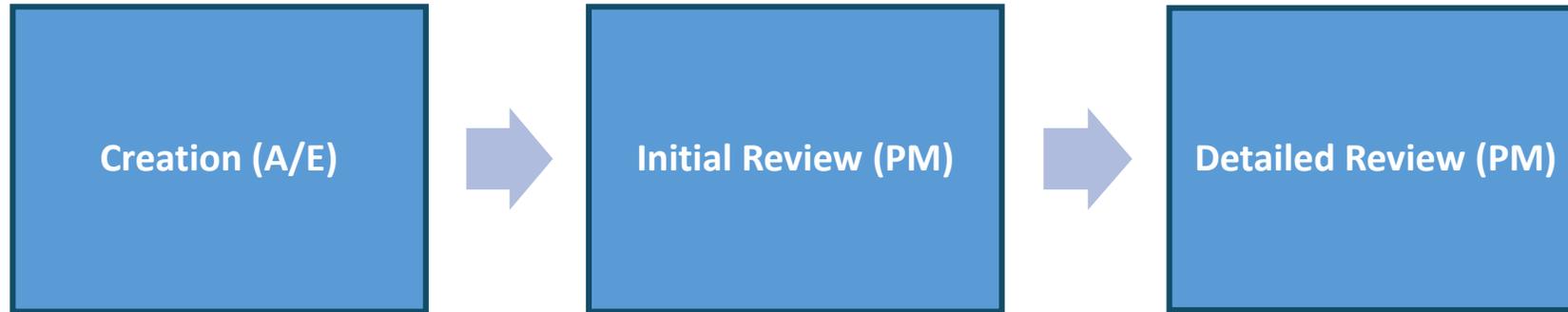
Purpose & Procedure

- ▶ The Design Review business process provides for the electronic submission, review and approval of the program verification, schematic design, design development and construction documents.
- ▶ The business process must be submitted at specific stages of the design process as defined in the Associate's (A/E) contract.
- ▶ Using this process, the Associate submits drawings and specifications electronically. The Project Manager (PM) coordinates review of the submittal. Automated workflow guides the process and records the results to the project record.



Design Review

Workflow Steps:



Click the boxes to navigate directly to each section

Uploading to Document Manager

- * *If you are a School District Project user, skip ahead to [Create Design Review Record](#)*

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



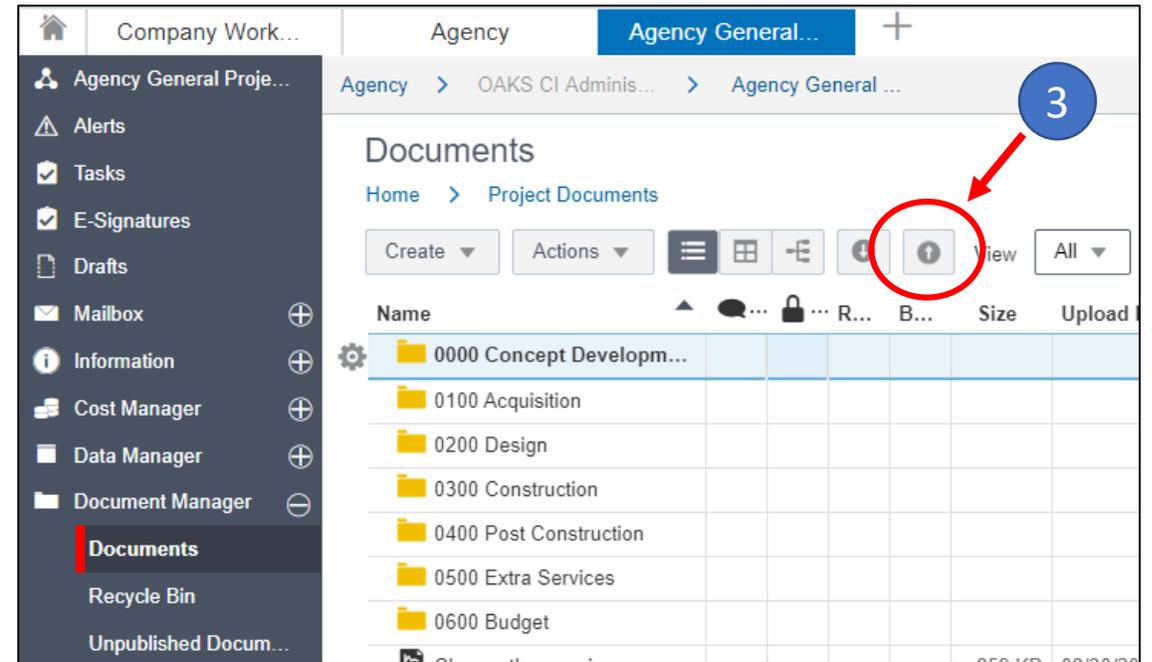
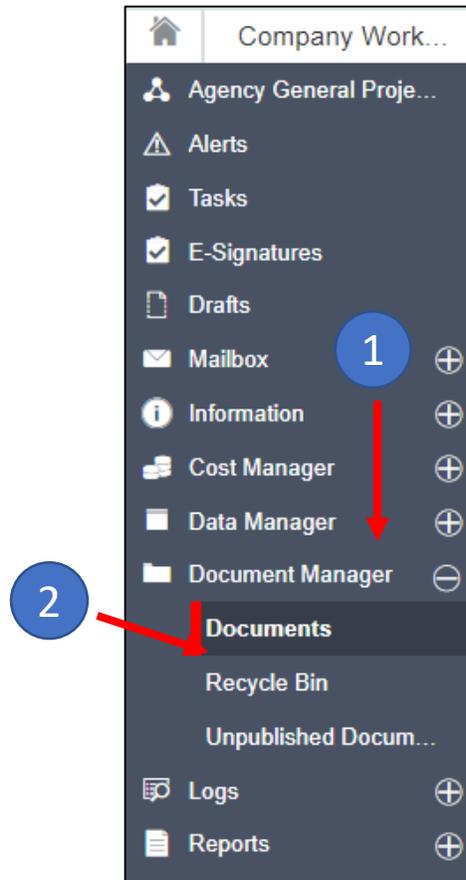
About Document Manager

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



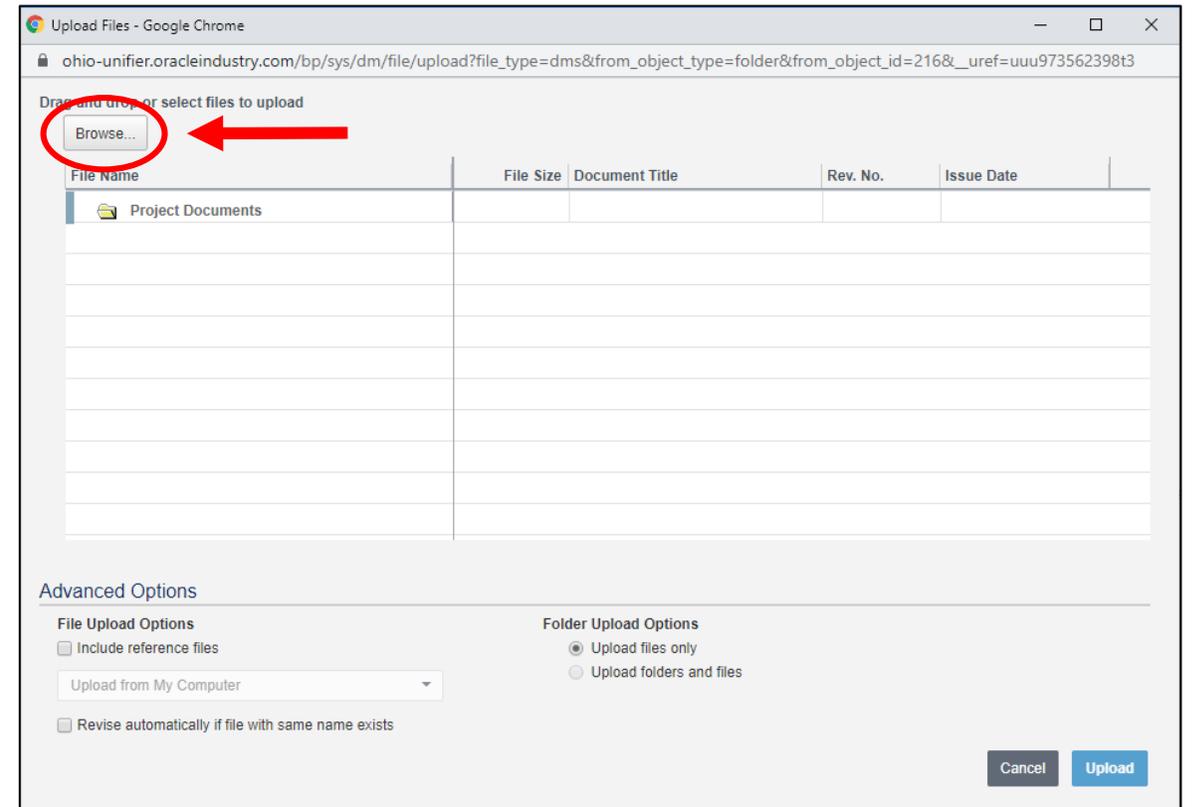
Document Upload

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



File Upload Window

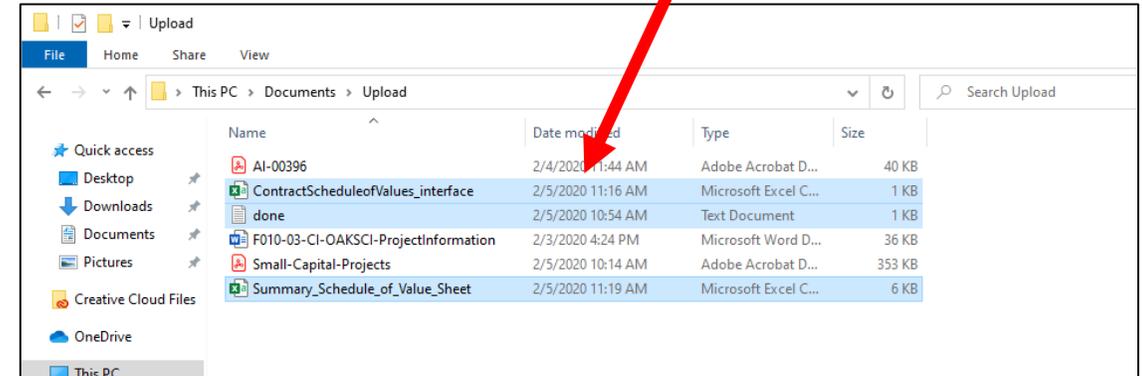
- ▶ A new window will appear for you to add files
- ▶ Click **Browse** to choose files for upload



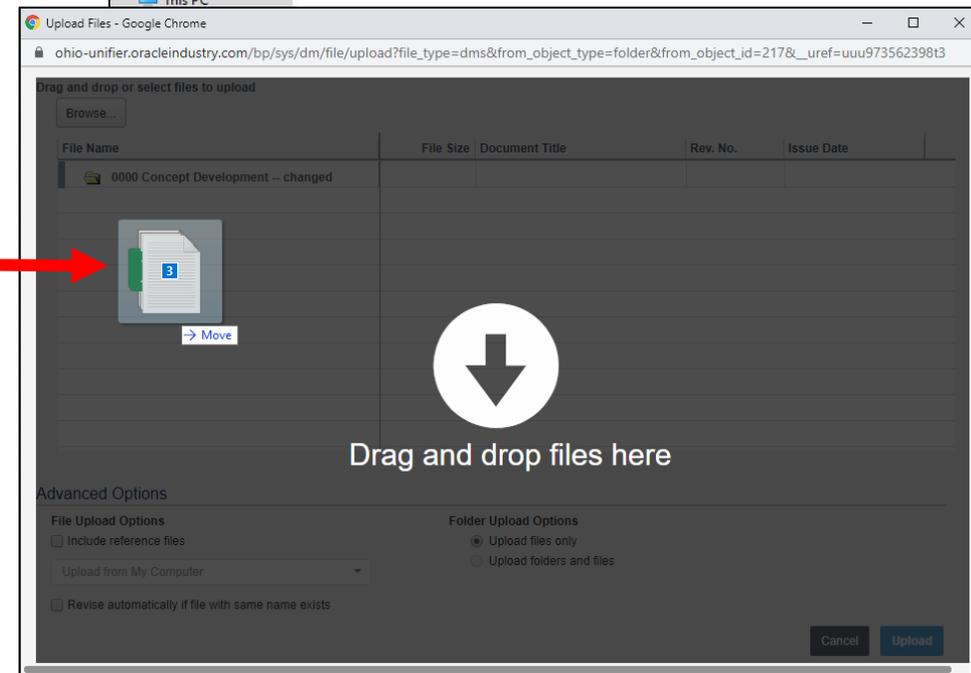
Drag and Drop files

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

Choose your folder of Documents or Select Multiple Documents

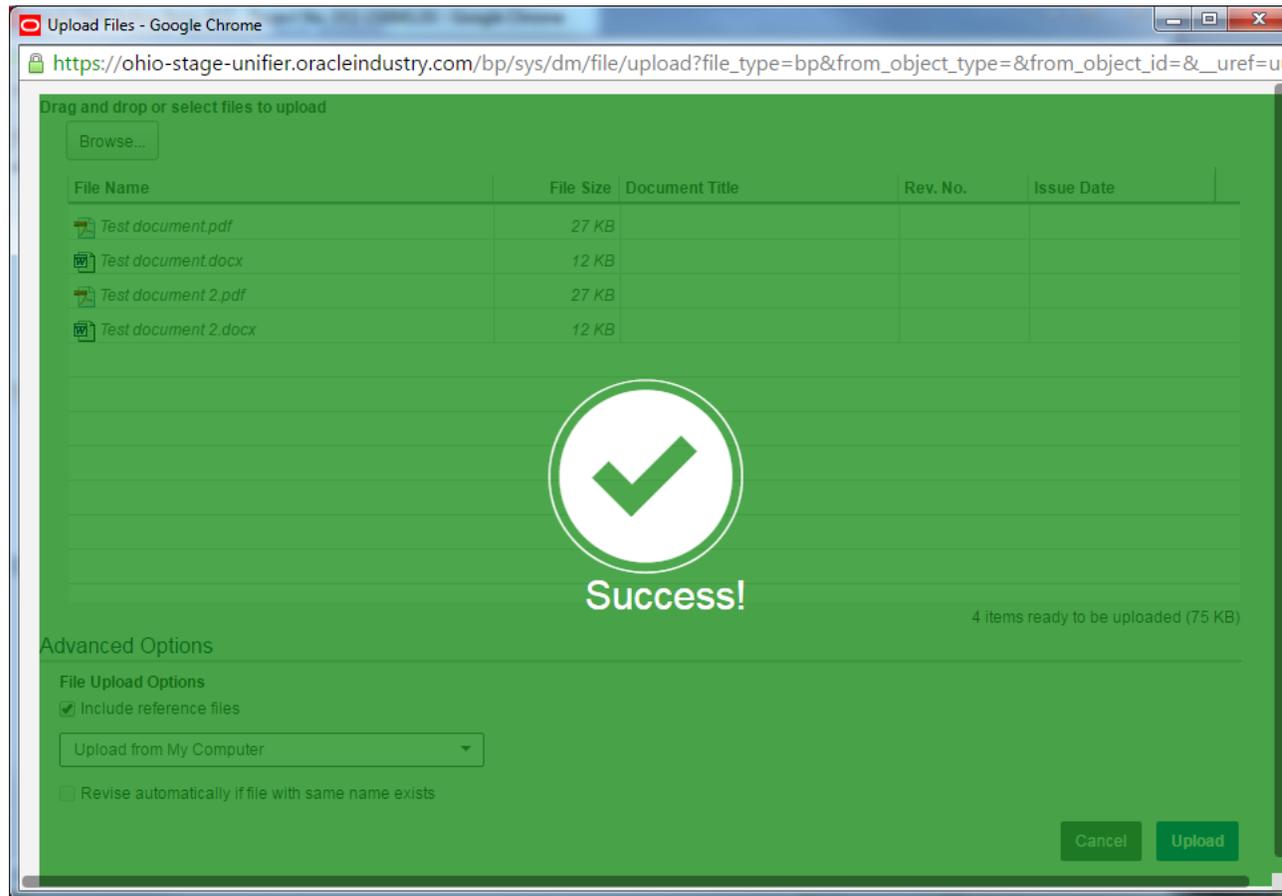


Drag and Drop the documents into the Upload Files window



Adding Documents

- ▶ If all folders and files have been added, you will see a green “Success!” screen



Upload Documents

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

Upload Files - Google Chrome

ohio-unifier.oracleindustry.com/bp/sys/dm/file/upload?file_type=dms&from_object_type=folder&from_object_id=216&_uref=uuu973562398t3

Drag and drop or select files to upload

Browse...

| File Name | File Size | Document Title | Rev. No. | Issue Date |
|--|-----------|----------------|----------|------------|
| Project Documents | | | | |
| ContractScheduleofValues_interface.csv | 1 KB | | | |
| done.txt | 1 KB | | | |
| Summary_Schedule_of_Value_Sheet - Copy.csv | 6 KB | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

3 items ready to be uploaded (7 KB)

Advanced Options

File Upload Options

Include reference files

Upload from My Computer

Revise automatically if file with same name exists

Folder Upload Options

Upload files only

Upload folders and files

Cancel Upload



View Documents

- ▶ The window will close, and you will receive a message that your files have been uploaded
- ▶ Click the **Refresh** button to see the new files

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'ORACLE Primavera Unifier' and breadcrumb navigation: 'Company Work...' > 'Agency' > 'Agency General...'. A left sidebar contains navigation options like Alerts, Tasks, E-Signatures, Drafts, Mailbox, Information, Cost Manager, Data Manager, Document Manager, Documents (highlighted), Recycle Bin, Unpublished Docum..., Logs, and Reports. The main area is titled 'Documents' and shows a list of folders and files. A red box highlights a message box that says: 'Files or folders have been successfully uploaded to the currently open Document Manager. To see the changes, click Refresh'. The message box is positioned over the 'Refresh' button in the toolbar. The toolbar also includes buttons for 'Create', 'Actions', 'View', 'All', 'Refresh', 'Star', 'Search', and 'Print'. The document list table has columns for Name, Issue Date, and Issue Date.

| Name | Issue Date | Issue Date |
|-----------------------------|------------|------------------|
| 0000 Concept Developme... | | |
| 0100 Acquisition | | |
| 0200 Design | | |
| 0300 Construction | | |
| 0400 Post Construction | | |
| 0500 Extra Services | | |
| 0600 Budget | | |
| Chrysanthemum.jpg | 859 KB | 08/30/2016 12... |
| Clear Browsing Data.docx | 886 KB | 09/01/2016 12... |
| Construction Phase DB Tr... | 26 MB | 02/09/2017 06... |
| Desert.jpg | 827 KB | 08/30/2016 12... |
| Penguins.jpg | 760 KB | 09/02/2016 11... |



Create Design Review (A/E)



Create a Design Review Record (A/E)

1. Click **Logs** to expand
2. Select the **Design Reviews** BP
3. Click **Create**

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with various options. The 'Logs' option is highlighted with a red box and a blue circle containing the number 1. The 'Design Reviews' option is also highlighted with a red box and a blue circle containing the number 2. The 'Create' button in the top right of the Design Reviews section is highlighted with a red box and a blue circle containing the number 3. The main content area displays a table of Design Review records.

| Record No | Stage | Completi... | Creation... | Est. Construction ... | St |
|-----------|----------------------|----------------|----------------|-----------------------|----|
| DR-0007 | Criteria Documents | 50% (CD O... | 04/05/2017 ... | 0.00 | Ac |
| DR-0006 | Program Verification | 85 - 95% (C... | 12/28/2016 ... | 0.00 | Pe |
| DR-0005 | Criteria Documents | 50% (CD O... | 09/16/2015 ... | 0.00 | Pe |
| DR-0004 | Program Verification | 50% (CD O... | 02/16/2015 ... | 8,450.00 | Ac |
| DR-0003 | Schematic Design | 50% (CD O... | 09/19/2012 ... | 25,000.00 | Pe |
| DR-0002 | Program Verification | 50% (CD O... | 04/10/2012 ... | 0.00 | Pe |
| DR-0001 | Construction Doc... | 50% (CD O... | 10/08/2009 ... | 0.00 | Pe |



Complete General Tab – Create (A/E)

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

Create New Design Reviews - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/udr/1003/46?__uref=uuu87962965t1#

Create New Design Reviews

Send Save

General Design Reviews

General

Organization: OAKS CI Test

Record Number: [Empty]

Project Number: OCI-080001

Creator: Matthew Weber

Project Name: Agency General Projects Test

Creation Date: [Empty]

Project Location: OAKS CI Administration

Status: [Empty]

Est. Construction Cost (\$): 50,000.00

Owner Name: OAKS CI Test

Stage *: Program Verification

Completion Status *: 50% (CD Only)

Comments: No Comments are available.



Add Attachments to Design Review – Create (A/E)

- ▶ Click the **Design Reviews** tab
 - ▶ Here you will add attachments to the record

Create New Design Reviews - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/udr/1003/46?_uref=uuu87962965t1

Create New Design Reviews

General **Design Reviews**

Add Actions View Comments by: All

| Name | Type | Status |
|-------------|------|--------|
| Attachments | | |

Total: 1

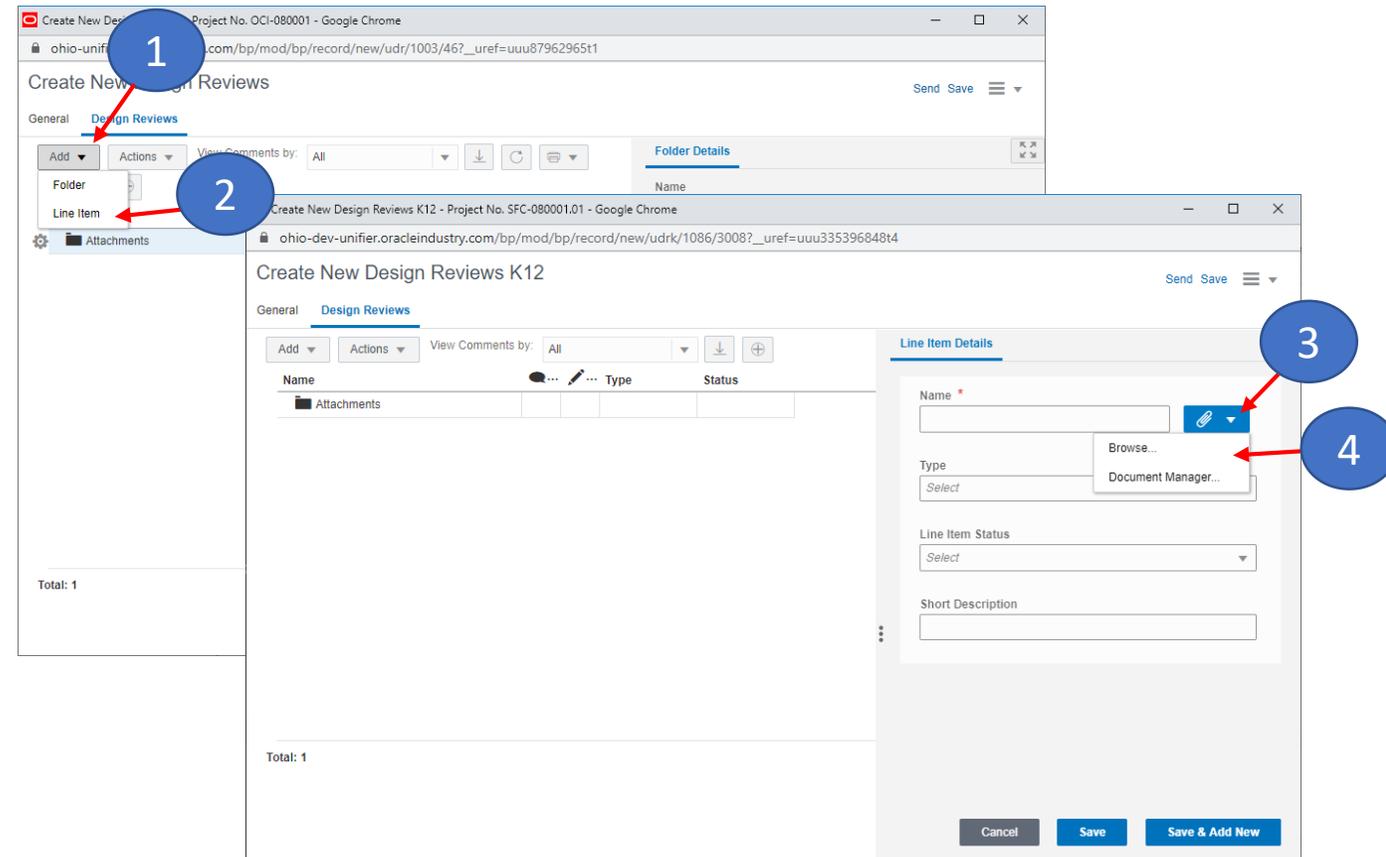
Folder Details

Name: Attachments

Folder Path:

Add Attachments – Create (A/E)

1. Click **Add**
2. Select **Line Item**
3. Click the attachment  button
4. Select **Browse** to attach documents from your computer, or select **Document Manager**

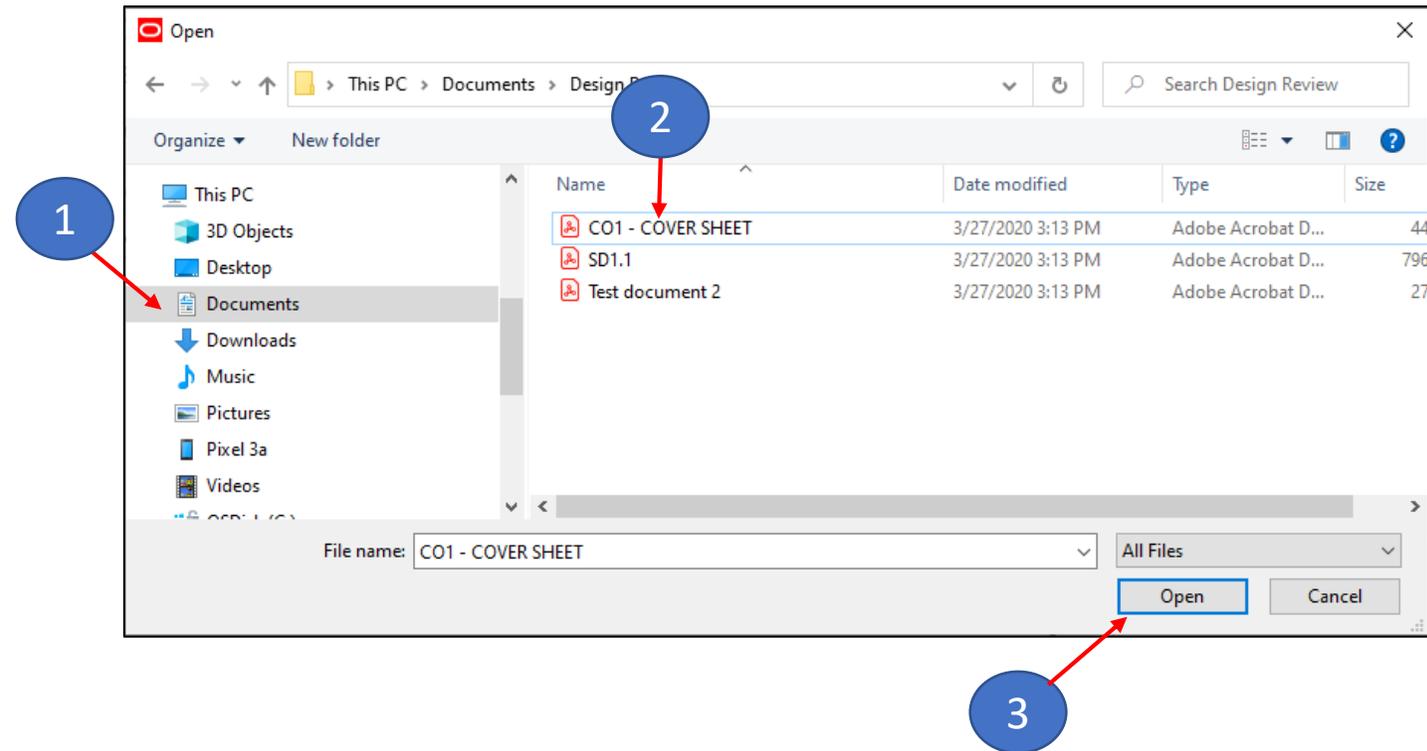


Add Attachments From Browse – Create (A/E)

* *If you uploaded the attachments with **Document Manager**, skip this slide*

▶ If you selected **Browse**, you will upload documents directly from your computer

1. Navigate to the folder where your documents are stored
2. Select the attachment you want to upload
3. Click **Open**



Add Attachments from Document Manager – Create (A/E)

* *If you uploaded the attachments from your computer with **Browse**, skip this slide*

▶ If you selected **Document Manager**, you will attach documents that are already uploaded

1. Navigate to the attachment by double clicking folders where the document is stored
2. Click the document you wish to attach
3. Click **Select**

The screenshot illustrates the steps for selecting files from the Document Manager. It shows two browser windows. The top window displays a 'Select Files' dialog with a table of folders. A blue circle with the number '1' points to the '0230 Design Development' folder. The bottom window displays a 'Select Files' dialog with a table of files. A blue circle with the number '2' points to the 'Test document.pdf' file. A blue circle with the number '3' points to the 'Select' button at the bottom right of the second window.

| Name | Location | Owner | Title | Revision... | Issue Date | Size |
|-----------------------------|----------|-------|-------|-------------|------------|------|
| 0210 Program Verification | /0200 | | | | | |
| 0215 Design Notes | /0200 | | | | | |
| 0220 Schematic Design | /0200 | | | | | |
| 0230 Design Development | /0200 | | | | | |
| 0240 Construction Documents | /0200 | | | | | |
| 0250 Bid & Award | /0200 | | | | | |
| 0299 Miscellaneous | /0200 | | | | | |

| Name | Location | Owner | Title | Revision... | Issue Date | Size |
|----------------------|-----------------------|--------------|-------|-------------|------------|-------|
| Test document.pdf | /0200 Design/0230 ... | Katie Tuttle | | | | 27 KB |
| Test document.docx | /0200 Design/0230 ... | Katie Tuttle | | | | 12 KB |
| Test document 2.pdf | /0200 Design/0230 ... | Katie Tuttle | | | | 27 KB |
| Test document 2.docx | /0200 Design/0230 ... | Katie Tuttle | | | | 12 KB |



Add Attachments – Create (A/E)

- ▶ The selected document will appear under the **Name** field
- ▶ Complete **Type**, and **Short Description** fields
- ▶ Click **Save** or **Save & Add New**

Create New Design Reviews K12 - Project No. SFC-080001.01 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udrk/1086/3008?_uref=uuu183972507t4

Create New Design Reviews K12

Send Save

General **Design Reviews**

Add Actions View Comments by: All

| Name | Type | Status |
|-------------|------|--------|
| Attachments | | |

Total: 1

Line Item Details

Name *
Test document 2.pdf

Type
Drawings

Line Item Status
Select

Short Description
Design Drawings

Cancel **Save** Save & Add New

Add Attachments – Create (A/E)

- ▶ Your document will show on the left-hand side
- ▶ Continue adding any necessary attachments until you are ready to move the record forward
- ▶ When the record is ready to move forward, Click **Send**

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udrk/1086/3008?_uref=uuu183972507t4

Create New Design Reviews K12

General **Design Reviews**

Add Actions View Comments by: All

| Name | Type | Status |
|---------------------|----------|--------|
| Attachments | | |
| Test document 2.pdf | Drawings | |

Total: 2

Line Item Details Attachments Linked Records

Name *
Test document 2.pdf

Type
Drawings

Line Item Status
Select

Short Description
Design Drawings

Cancel Save Save & Add New



Submit for Initial Review – Create (A/E)

- ▶ Verify Workflow Action (Submit)
 - ▶ The recipients of the task will automatically populate
- ▶ Click Send
 - ▶ The record will be sent to the PM for Initial Review

The screenshot shows the 'Create New Design Review' form in Oracle Primavera. The 'Workflow Action Details' modal is open, showing the 'Submit' workflow action selected. The 'Send For' field is set to 'Initial Review'. The 'To' field is populated with the email addresses of the project team members. The 'Task Due Date' is set to 03/28/2020 01:55 PM. The 'Send' button is highlighted with a red circle and arrow.

| Name | Company Name | Task Due Date |
|--------------------|---------------|---------------------|
| Archana Atrey | State of Ohio | 03/28/2020 01:55 PM |
| Brett Gundlach | State of Ohio | 03/28/2020 01:55 PM |
| Matthew Weber | State of Ohio | 03/28/2020 01:55 PM |
| OHIO Administrator | State of Ohio | 03/28/2020 01:55 PM |



Initial Review (PM)



Receive Task – Initial Review (PM)

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

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

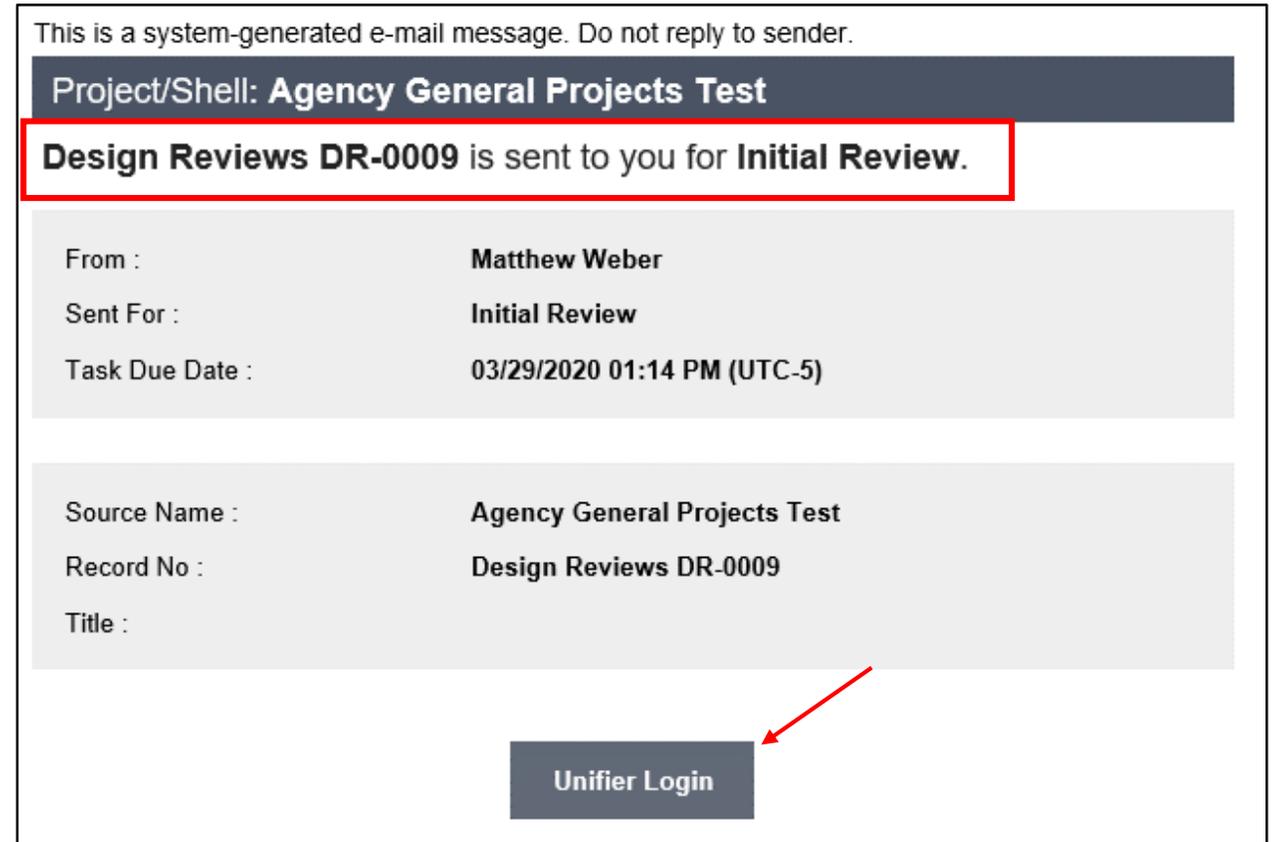
Project/Shell: Agency General Projects Test

Design Reviews DR-0009 is sent to you for Initial Review.

From : **Matthew Weber**
Sent For : **Initial Review**
Task Due Date : **03/29/2020 01:14 PM (UTC-5)**

Source Name : **Agency General Projects Test**
Record No : **Design Reviews DR-0009**
Title :

[Unifier Login](#)



Open Task – Initial Review (PM)

- ▶ After logging into the system, the PM will find the **Task** corresponding to the email
- ▶ Double click the **Task** to open

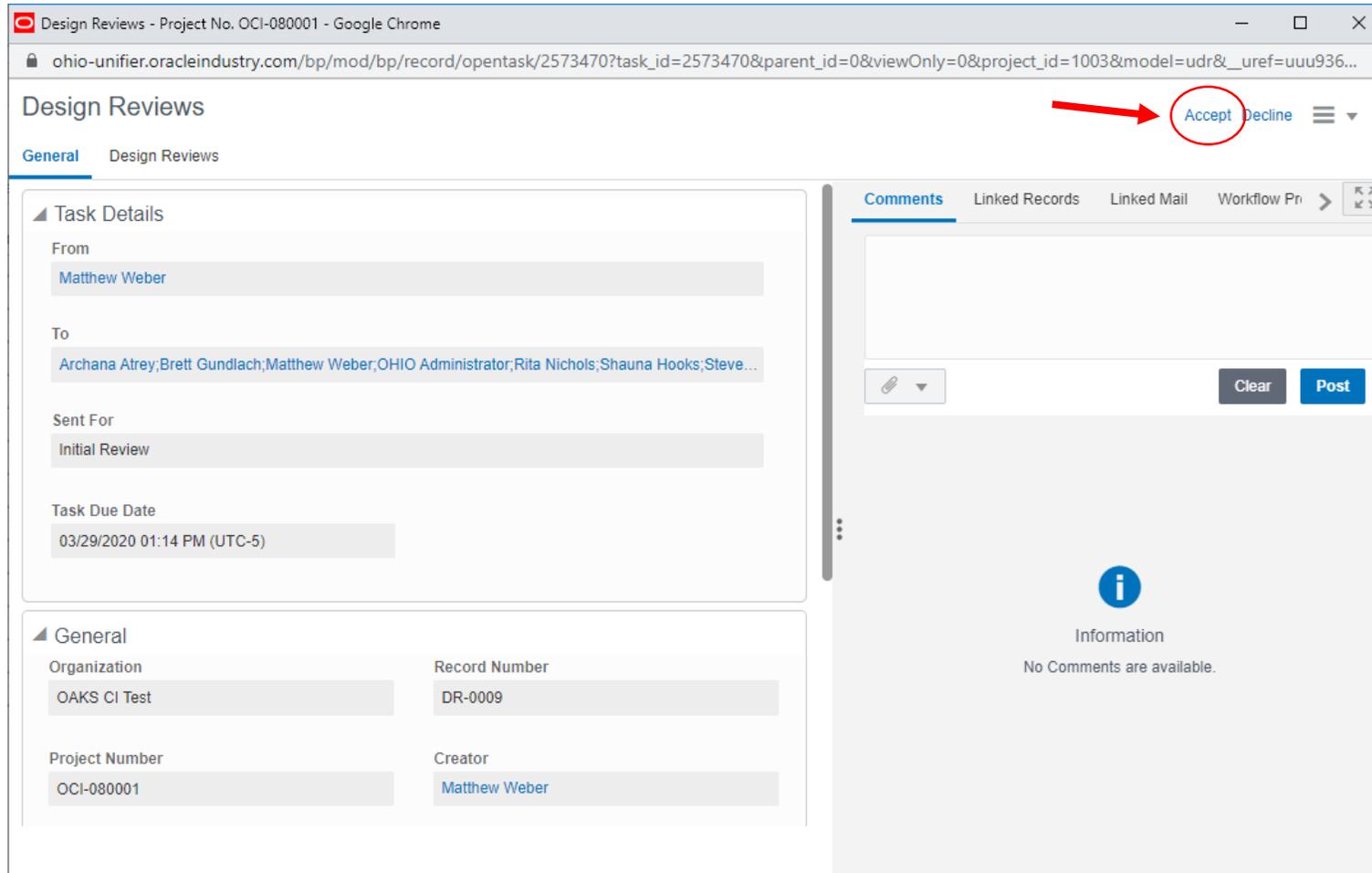
The screenshot shows the Primavera Unifier web interface. The browser address bar displays the URL: ohio-unifier.oracleindustry.com/bp/route/1/i-project_tasks?_u. The page header includes the Oracle Primavera Unifier logo and navigation tabs for 'Agency General...' and 'OAKS CI Suppo...'. A left-hand navigation menu lists various system components, with 'Tasks' highlighted. The main content area, titled 'Tasks', features a table of task entries. The first entry, 'Agency General Proj... Design Reviews', is highlighted with a red box and a red arrow. Below the table, it indicates 'Total: 13' tasks.

| Origin | Task Name |
|------------------------|-----------------------|
| Agency General Proj... | Design Reviews |
| Agency General Proj... | Subcontractor/Su... |
| Agency General Proj... | Professional Servi... |
| Agency General Proj... | Contractor Pay R... |
| Agency General Proj... | Professional Servi... |
| Agency General Proj... | Contractor Pay R... |
| Agency General Proj... | Professional Servi... |
| Agency General Proj... | Change Order |
| Agency General Proj... | Schedule Approvals |
| Agency General Proj... | Action Items |
| Agency General Proj... | Action Items |



Accept Task – Initial Review (PM)

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



The screenshot displays a web interface for "Design Reviews" in Oracle Industry Cloud. The browser title is "Design Reviews - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2573470?task_id=2573470&parent_id=0&viewOnly=0&project_id=1003&model=udr&_uref=uuu936...".

The page header shows "Design Reviews" with a red arrow pointing to the "Accept" button, which is circled in red. Next to it is a "Decline" button and a menu icon.

The main content area is divided into two sections:

- Task Details:**
 - From: Matthew Weber
 - To: Archana Atrey; Brett Gundlach; Matthew Weber; OHIO Administrator; Rita Nichols; Shauna Hooks; Steve...
 - Sent For: Initial Review
 - Task Due Date: 03/29/2020 01:14 PM (UTC-5)
- General:**

| | |
|----------------------------|------------------------|
| Organization: OAKS CI Test | Record Number: DR-0009 |
| Project Number: OCI-080001 | Creator: Matthew Weber |

The right sidebar contains a "Comments" section with a "Post" button and a "Clear" button. Below the comments section is an information icon and the text "Information: No Comments are available."



Review General Tab – Initial Review (PM)

- ▶ Review the information in the General Tab
- ▶ Check the right pane to see if there are any General Comments attached

Design Reviews - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2573470/undefined/undefined?_uref=uuu936962708t1

Design Reviews Send Save

General Design Reviews

General

| | |
|---|---|
| Organization OAKS CI Test | Record Number DR-0009 |
| Project Number OCI-080001 | Creator Matthew Weber |
| Project Name Agency General Projects Test | Creation Date 03/26/2020 01:15 PM (UTC-5) |
| Project Location OAKS CI Administration | Status Pending |
| Est. Construction Cost (\$) 50,000.00 | Owner Name OAKS CI Test |
| Stage Program Verification | Completion Status 50% (CD Only) |

Comments Linked Records Lint

Clear Post

i
Information
No Comments are available.



Design Reviews – Initial Review (PM)

- ▶ Click the **Design Reviews** tab to view attachments
- ▶ Single click an attachment to view **Line Item Details** in the right pane
- ▶ Double click attachment to view

The screenshot shows a web application interface for "Design Reviews K12". The "Design Reviews" tab is selected and circled in red. Below the tab is a table of attachments. A red arrow points to the "CO1 - COVER SHEET.pdf" attachment in the table. To the right of the table, the "Line Item Details" pane is open, showing the details for the selected attachment. The details include the name "CO1 - COVER SHEET.pdf", the type "Drawings", and the short description "Design Drawings". The "Line Item Status" field is empty. At the bottom of the details pane are buttons for "Cancel", "Save", and "Save & Add New".

| Name | Type | Status |
|-----------------------|----------|--------|
| Attachments | | |
| Test document 2.pdf | Drawings | |
| SD1.1.pdf | Drawings | |
| CO1 - COVER SHEET.pdf | Drawings | |

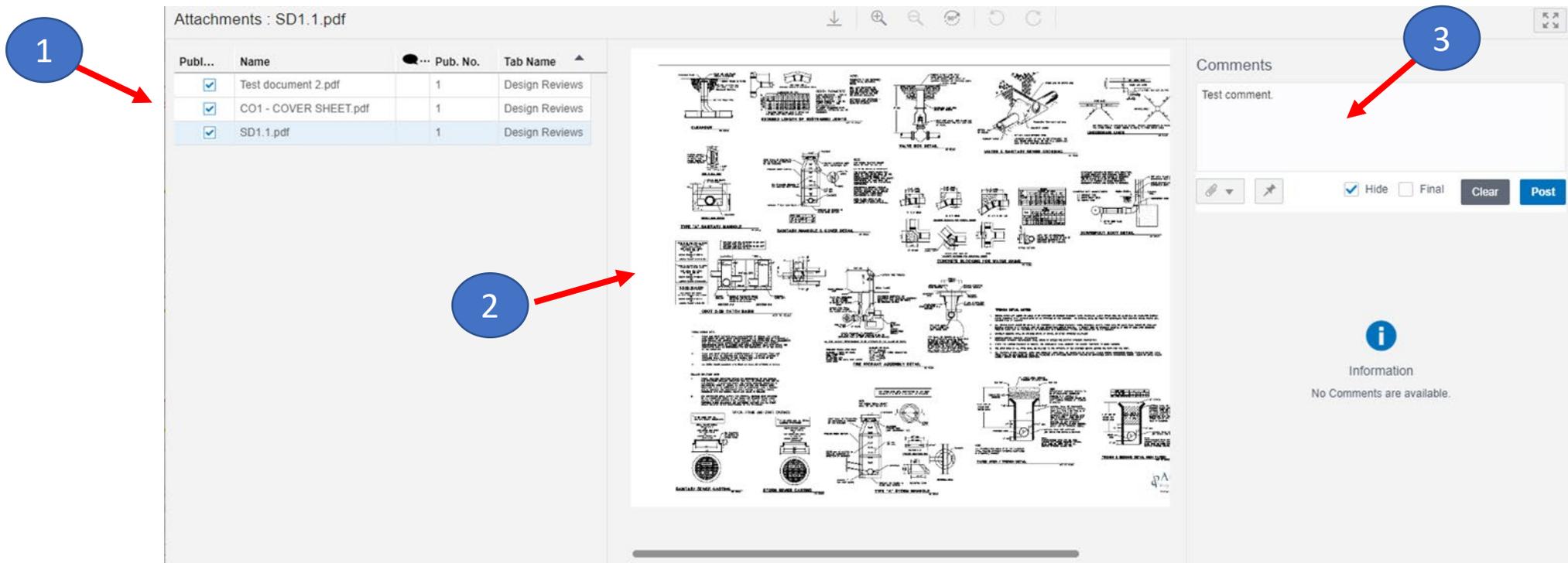
Total: 4



View Attachments – Initial Review (PM)

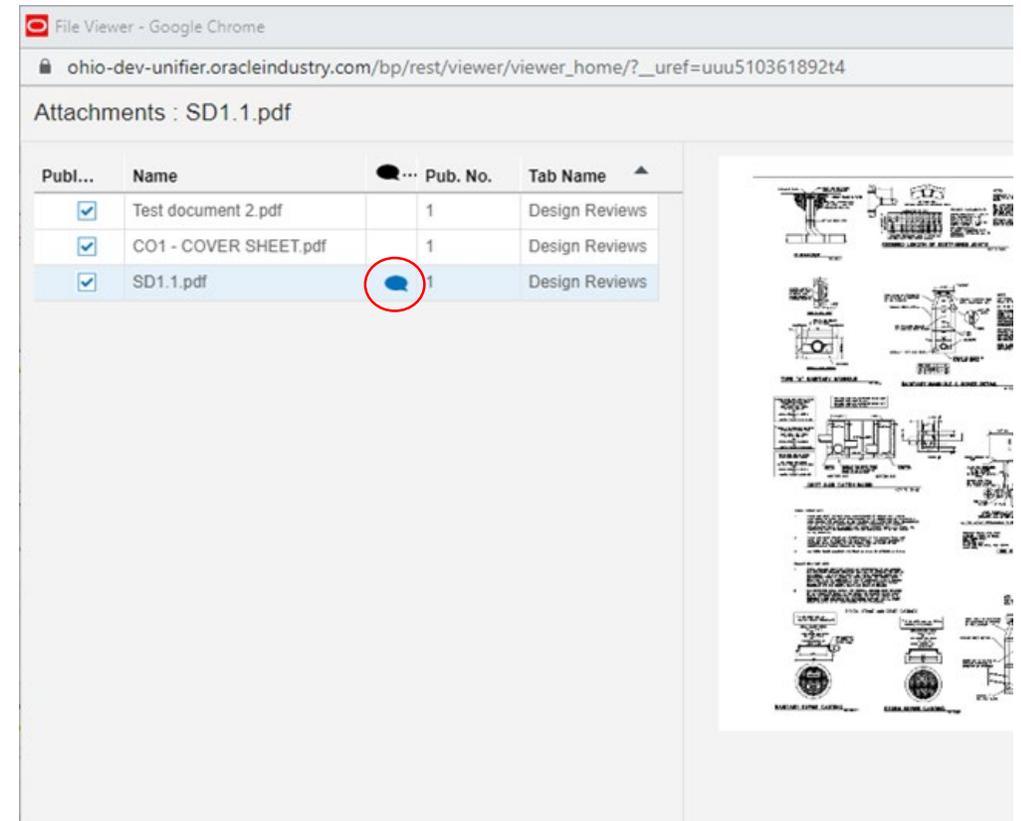
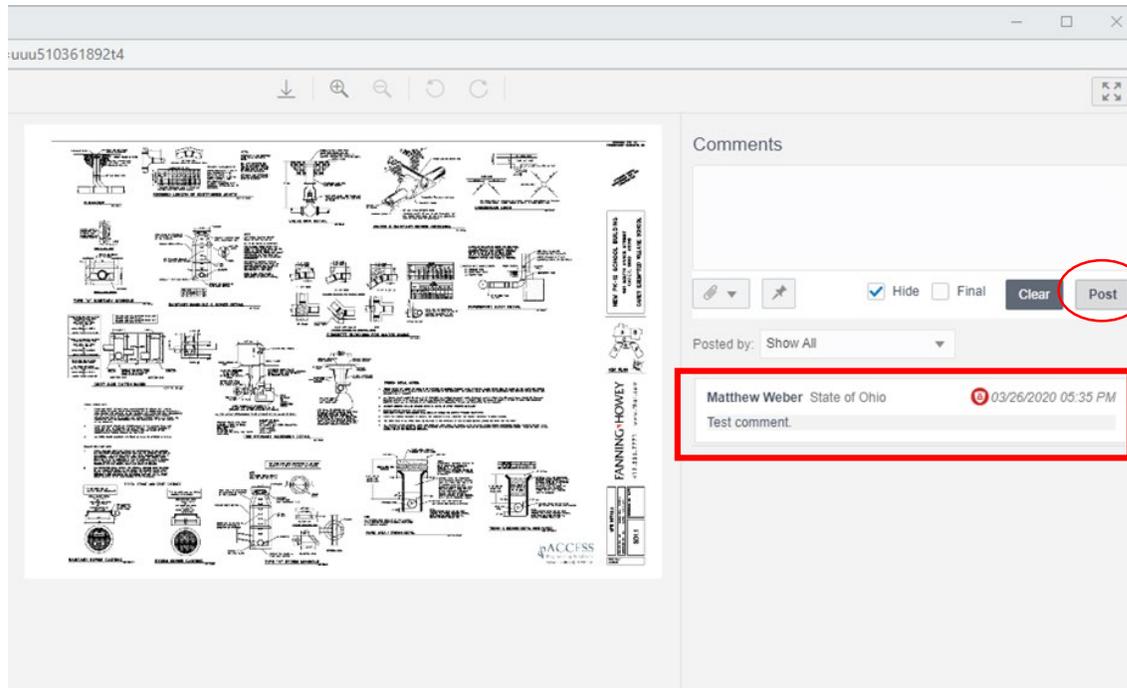
A new window will open to display the documents in three sections

1. The left section will display the attachments under the folder you've selected. Click each attachment to view details.
2. The middle section will display the document, this can be an image or text depending on the file
3. The right section will allow you to see and add comments to the selected document



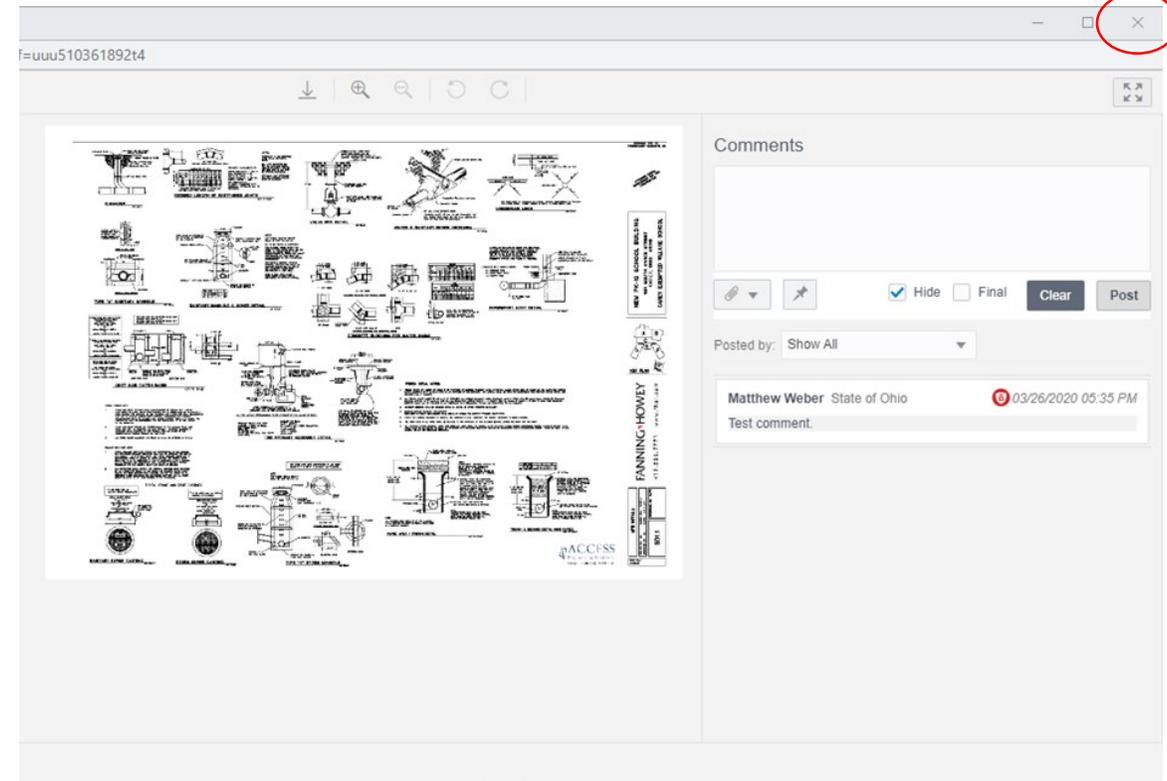
Add Comments – Initial Review (PM)

- ▶ After typing your comment, click the **Post** button
- ▶ The comment will display below and be linked to the attachment permanently
- ▶ Once any comment is added, a blue comment bubble will be visible next to the attachment



View Attachments – Initial Review (PM)

- ▶ When you are finished reviewing the attachments, close the window by clicking the **X** in the top right corner



Send Record – Initial Review (PM)

- ▶ When the Initial Review is complete, click the **Send** button at the top right corner of the record

The screenshot displays a web browser window titled "Design Reviews - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2573470/undefined/undefined?__uref=uuu936962708t1". The page header shows "Design Reviews" with a "Send" button circled in red and a red arrow pointing to it. Below the header, there are tabs for "General" and "Design Reviews". The "General" tab is active, showing a form with the following fields:

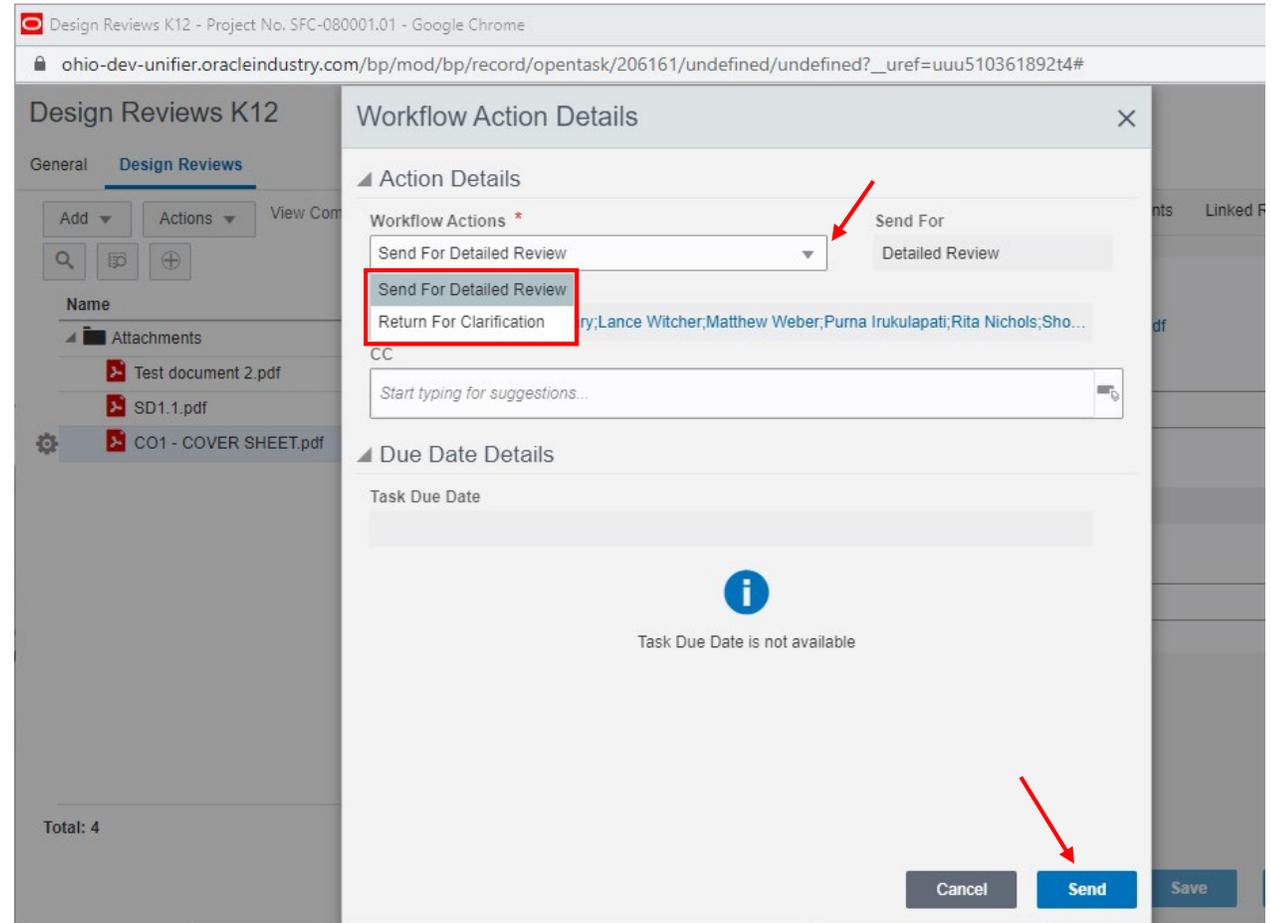
| | |
|---|---|
| Organization OAKS CI Test | Record Number DR-0009 |
| Project Number OCI-080001 | Creator Matthew Weber |
| Project Name Agency General Projects Test | Creation Date 03/26/2020 01:15 PM (UTC-5) |
| Project Location OAKS CI Administration | Status Pending |
| Est. Construction Cost (\$) 50,000.00 | Owner Name OAKS CI Test |
| Stage Program Verification | Completion Status 50% (CD Only) |

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



Send Record – Initial Review (PM)

- ▶ Select the **Workflow Action**
 - ▶ **Send for Detailed Review:** Sends the review to the PM for detailed review
 - ▶ **Return for Clarification:** Sends the review back to the A/E for update
- ▶ Click **Send**



Detailed Review (PM)



Receive Task – Detailed Review (PM)

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

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

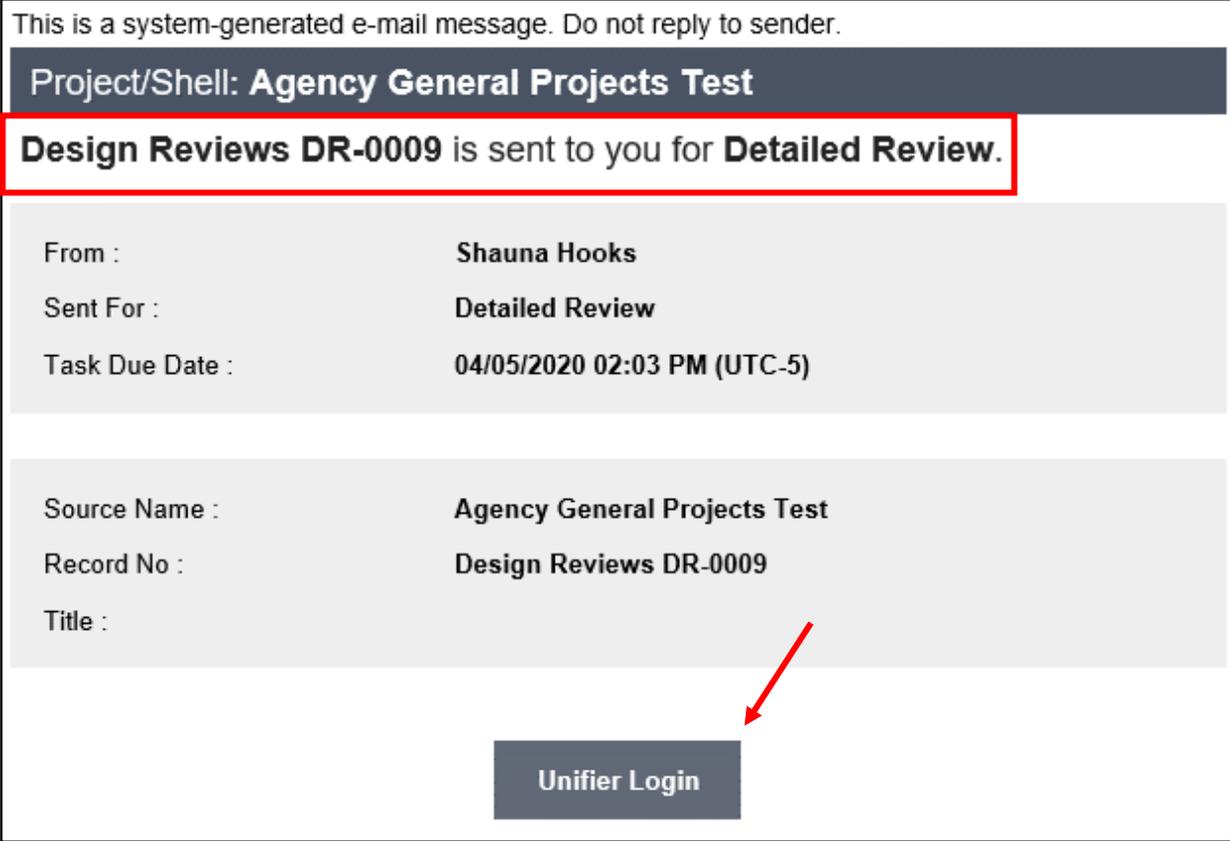
Project/Shell: Agency General Projects Test

Design Reviews DR-0009 is sent to you for Detailed Review.

From : Shauna Hooks
Sent For : Detailed Review
Task Due Date : 04/05/2020 02:03 PM (UTC-5)

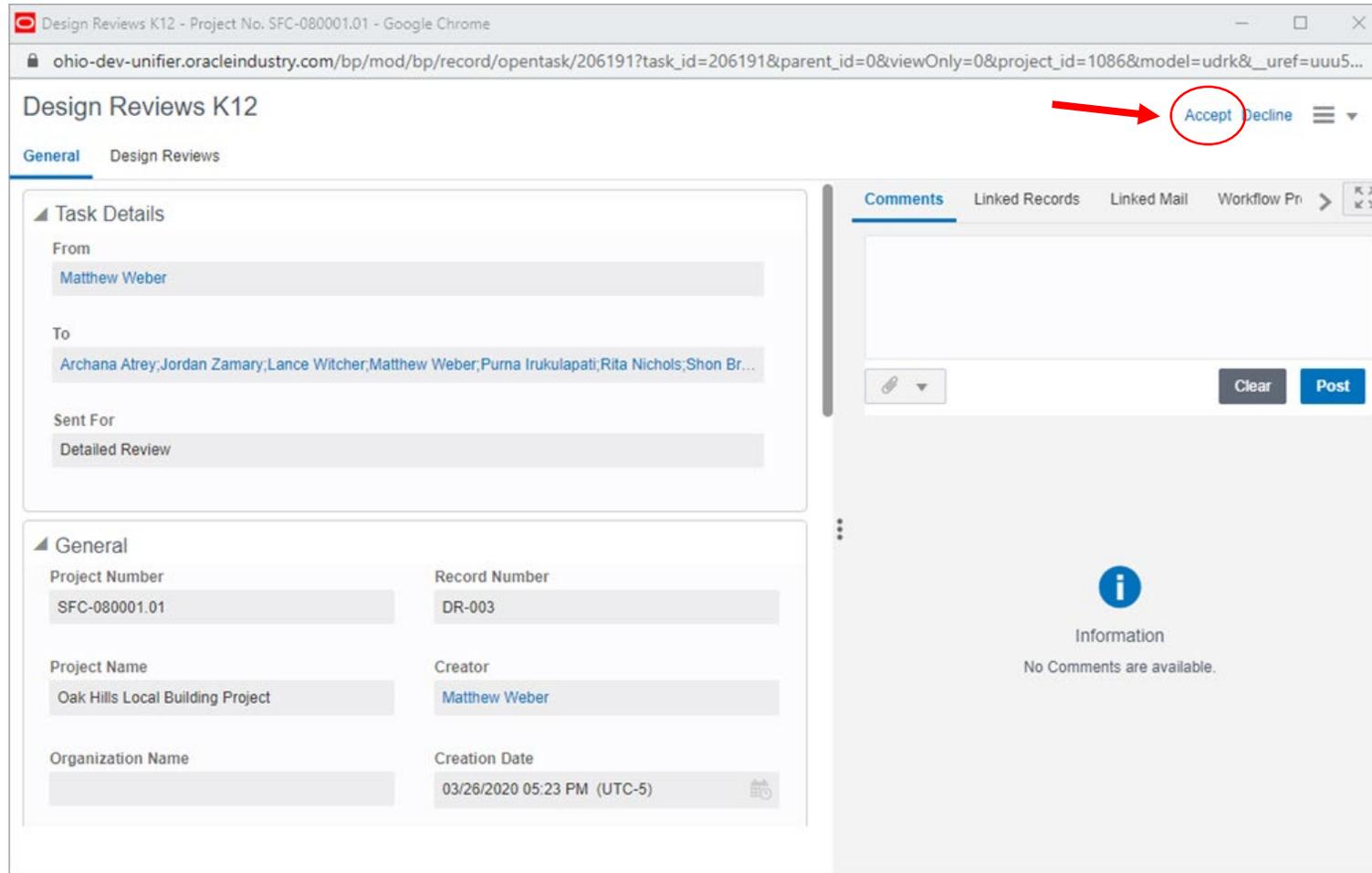
Source Name : Agency General Projects Test
Record No : Design Reviews DR-0009
Title :

[Unifier Login](#)



Accept Task – Initial Review (PM)

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



The screenshot displays a web application interface for 'Design Reviews K12'. The browser address bar shows the URL: `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/206191?task_id=206191&parent_id=0&viewOnly=0&project_id=1086&model=udrk&_uref=uuu5...`. The page title is 'Design Reviews K12'. In the top right corner, there are buttons for 'Accept' and 'Decline', with a red arrow pointing to the 'Accept' button. Below the title, there are tabs for 'General' and 'Design Reviews'. The main content area is divided into two columns. The left column contains 'Task Details' and 'General' sections. The 'Task Details' section shows 'From: Matthew Weber', 'To: Archana Atrey; Jordan Zamary; Lance Witcher; Matthew Weber; Purna Irukulapati; Rita Nichols; Shon Br...', and 'Sent For: Detailed Review'. The 'General' section shows 'Project Number: SFC-080001.01', 'Record Number: DR-003', 'Project Name: Oak Hills Local Building Project', 'Creator: Matthew Weber', 'Organization Name', and 'Creation Date: 03/26/2020 05:23 PM (UTC-5)'. The right column contains a 'Comments' section with a 'Post' button and a message: 'Information: No Comments are available.'



Review General Tab – Detailed Review (PM)

- ▶ Review the information in the General Tab
- ▶ Check the right pane to see if there are any General Comments attached

The screenshot displays a web browser window titled "Design Reviews - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2573470/undefined/undefined?_uref=uuu936962708t1". The page shows a "Design Reviews" header with "Send Save" and a menu icon. Below the header, the "General" tab is selected, and the "Comments" pane is visible on the right. A red arrow points to the "General" tab, and a red box highlights the "Comments" tab.

| General | |
|------------------------------|-----------------------------|
| Organization | Record Number |
| OAKS CI Test | DR-0009 |
| Project Number | Creator |
| OCI-080001 | Matthew Weber |
| Project Name | Creation Date |
| Agency General Projects Test | 03/26/2020 01:15 PM (UTC-5) |
| Project Location | Status |
| OAKS CI Administration | Pending |
| Est. Construction Cost (\$) | Owner Name |
| 50,000.00 | OAKS CI Test |
| Stage | Completion Status |
| Program Verification | 50% (CD Only) |

The right pane shows the "Comments" tab, which is currently empty. It includes a "Clear" button and a "Post" button. Below the input area, there is an information icon and the text "Information No Comments are available."



Design Reviews – Detailed Review (PM)

- ▶ Click the **Design Reviews** tab to view attachments
- ▶ Single click an attachment to view **Line Item Details** in the right pane.

Design Reviews K12 - Project No. SFC-080001.01 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/206191/undefined/undefined?_uref=uuu510361892t4

Design Reviews K12

General **Design Reviews**

Add Actions View Comments by: All

| Name | Type | Status |
|-----------------------|----------|--------|
| Attachments | | |
| Test document 2.pdf | Drawings | |
| SD1.1.pdf | Drawings | |
| CO1 - COVER SHEET.pdf | Drawings | |

Total: 4

Line Item Details Attachments Linked Records

Name * SD1.1.pdf

Type Drawings

Line Item Status Select

Short Description Design Drawings

Cancel Save Save & Add New



Change Line Item Status – Detailed Review (PM)

1. Click the arrow next to **Line Item Status**
2. Select a new status
3. Click **Save**
4. New status will display next to the attachment

Design Reviews K12 - Project No. SFC-080001.01 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/206191/undefined/undefined?__uref=uuu510361892t4

Design Reviews K12

General **Design Reviews**

Add Actions View Comments by: All

| Name | Type | Status |
|-----------------------|----------|--------|
| Attachments | | |
| Test document 2.pdf | Drawings | |
| SD1.1.pdf | Drawings | |
| CO1 - COVER SHEET.pdf | Drawings | |

Total: 4

Line Item Details Attachments Linked Records

Name * SD1.1.pdf

Type Drawings

Line Item Status

- Select
- Accepted
- Conforms
- Conforms as Noted
- Held
- No Action Required
- Received
- Revise & Resubmit

Cancel Save Save & Add New

Design Reviews K12 - Project No. SFC-080001.01 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207194/undefined/undefined?__uref=uuu612327467t4

Design Reviews K12

General **Design Reviews**

Add Actions View Comments by: All

| Name | Type | Status |
|-----------------------|----------|----------|
| Attachments | | |
| SD1.1.pdf | Drawings | Accepted |
| Test document 2.pdf | Drawings | Accepted |
| CO1 - COVER SHEET.pdf | Drawings | Accepted |

Total: 4

Line Item Details Attachments Linked Records

Name Test document 2.pdf

Type Drawings

Line Item Status Accepted

Short Description Design Drawings

Cancel Save



Send Record – Detailed Review (PM)

- ▶ When the Detailed Review is complete, click the **Send** button at the top right corner of the record

The screenshot displays a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/206191/undefined/undefined?__uref=uuu510361892t4#`. The page title is "Design Reviews K12". At the top right, there are buttons for "Send" (circled in red), "Save", and a menu icon. A red arrow points to the "Send" button. Below the header, there are tabs for "General" (selected) and "Design Reviews". The "General" tab contains a form with the following fields:

| | |
|----------------------------------|-----------------------------|
| Project Number | Record Number |
| SFC-080001.01 | DR-003 |
| Project Name | Creator |
| Oak Hills Local Building Project | Matthew Weber |
| Organization Name | Creation Date |
| | 03/26/2020 05:23 PM (UTC-5) |
| Facility Name | Status |
| | Pending |
| Est. Construction Cost (\$) | |
| 50,000.00 | |
| Stage | Completion Status |
| Program Verification | 50% (CD Only) |
| FilePath | |

On the right side, there are tabs for "Comments", "Linked Records", "Linked Mail", and "Workflow Pr". The "Comments" tab is active, showing a "Hide" checkbox (checked), "Clear", and "Post" buttons. Below the comments area, there is an information icon and the text "Information No Comments are available."

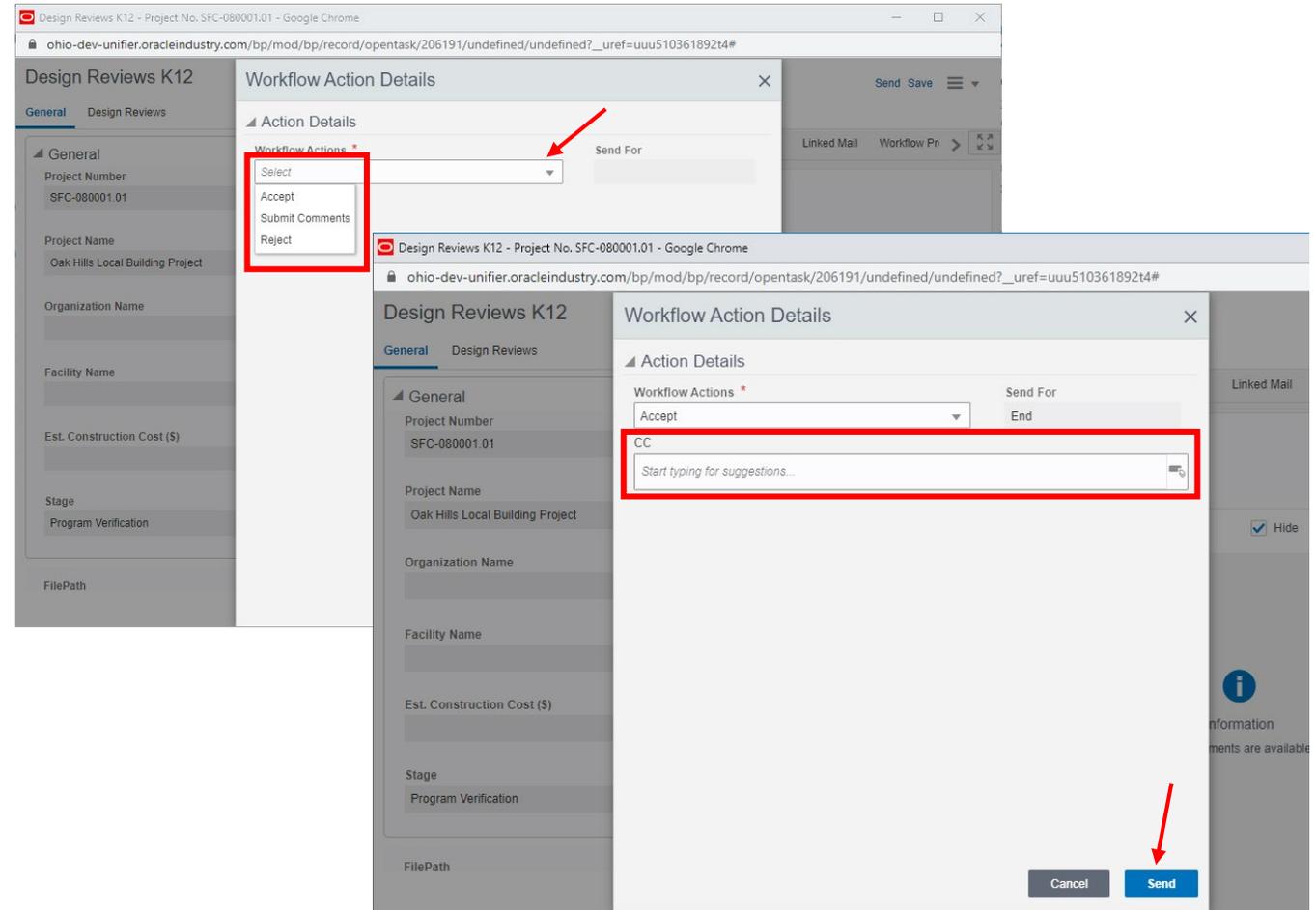


Send Record – Initial Review (PM)

- ▶ Select the **Workflow Action**

- ▶ **Accept:** Select to complete the Design Review Business Process. The **CC** field can be used to notify project members
- ▶ **Submit Comments:** Sends the review back to the A/E for Comment Response. **To** field will automatically populate.
- ▶ **Reject:** will end Record

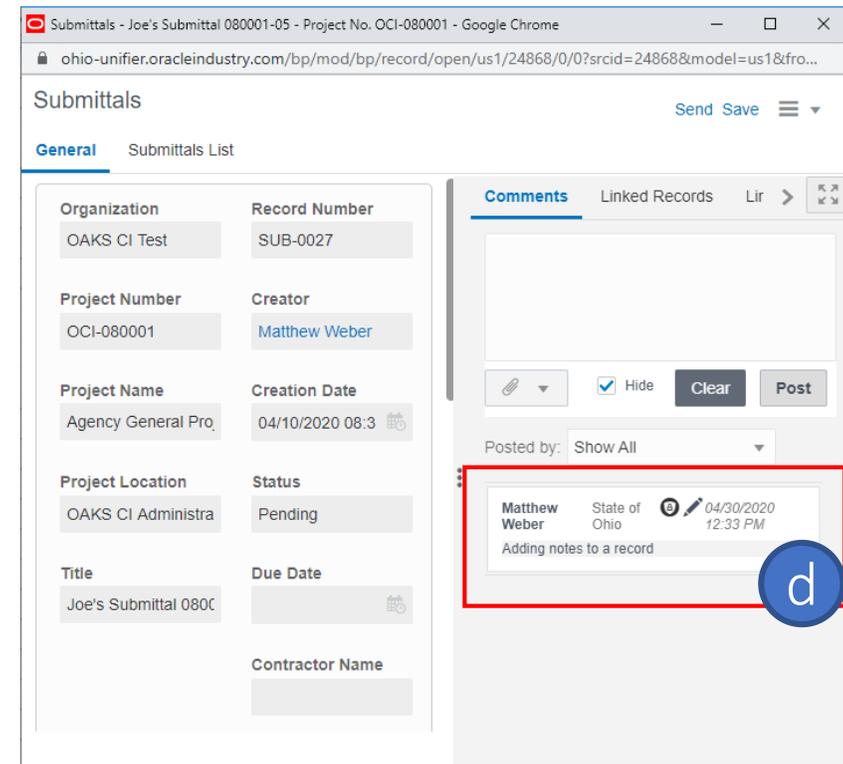
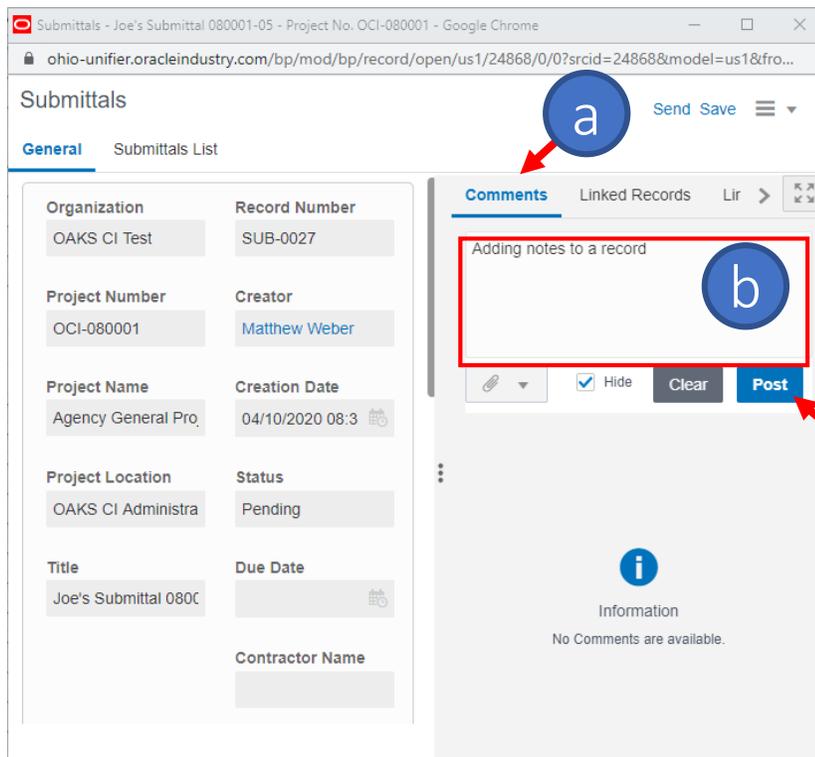
- ▶ Click **Send**



Add Comments to Records



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



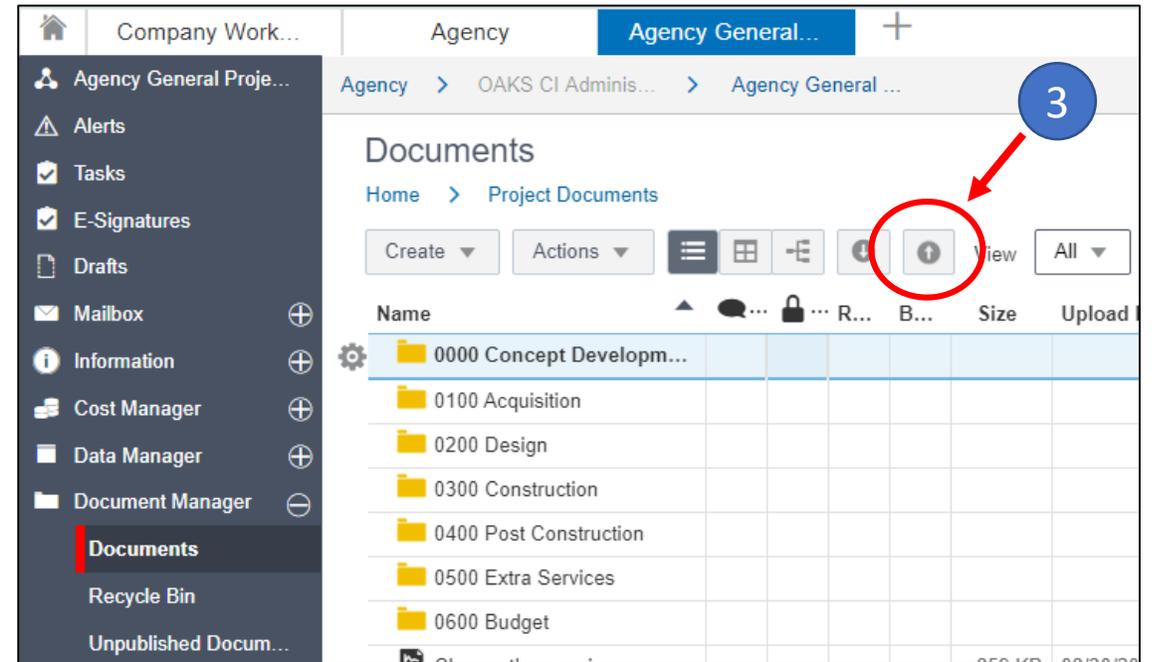
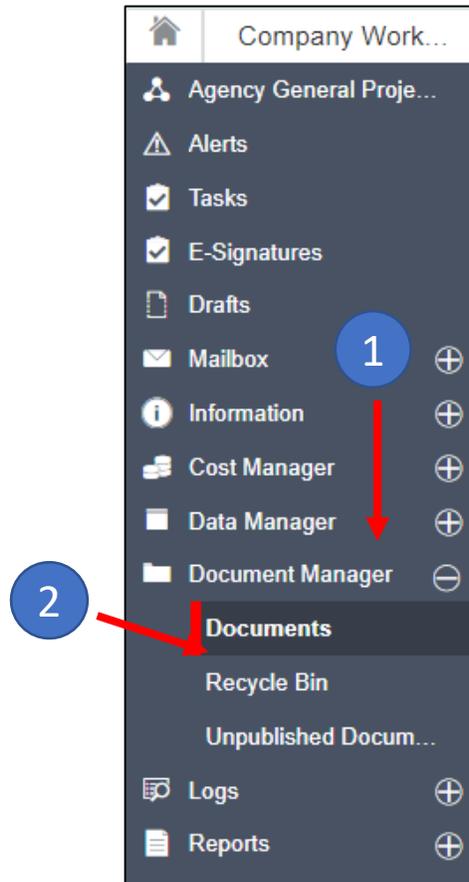
Document Manager Uploading

About Document Manager

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

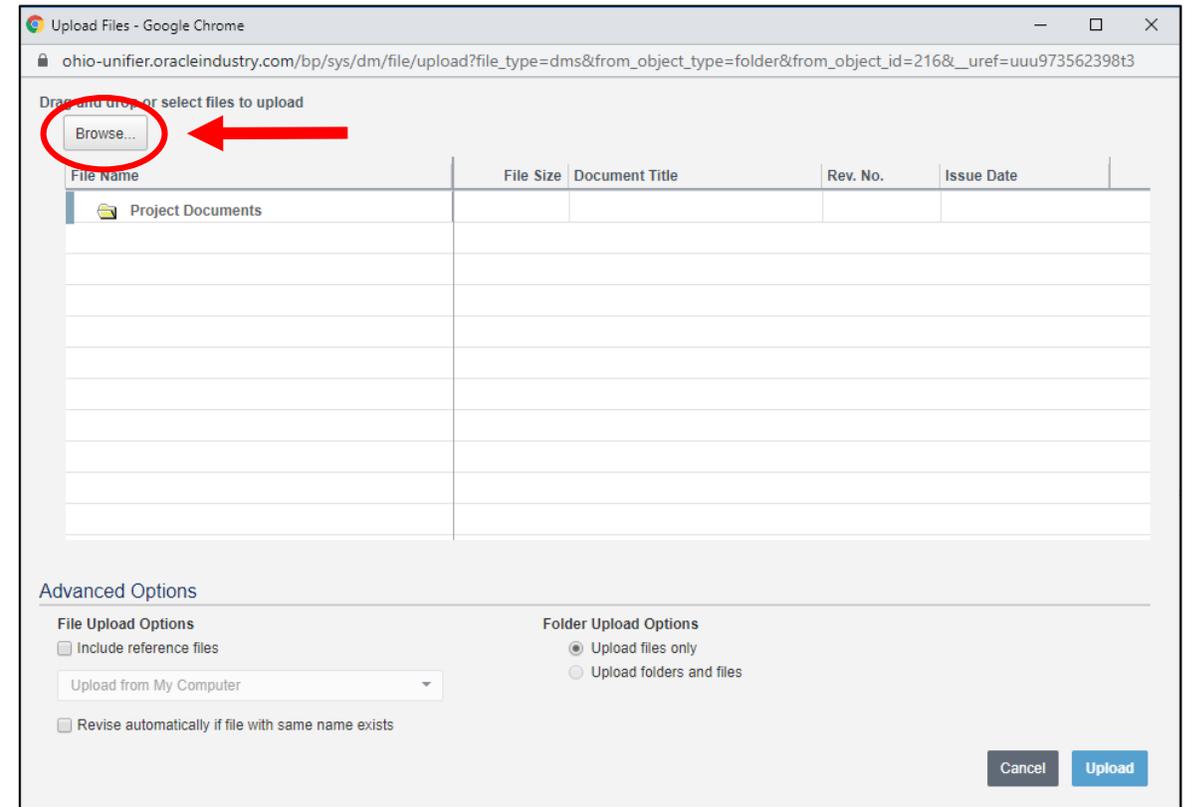
Document Upload

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



File Upload Window

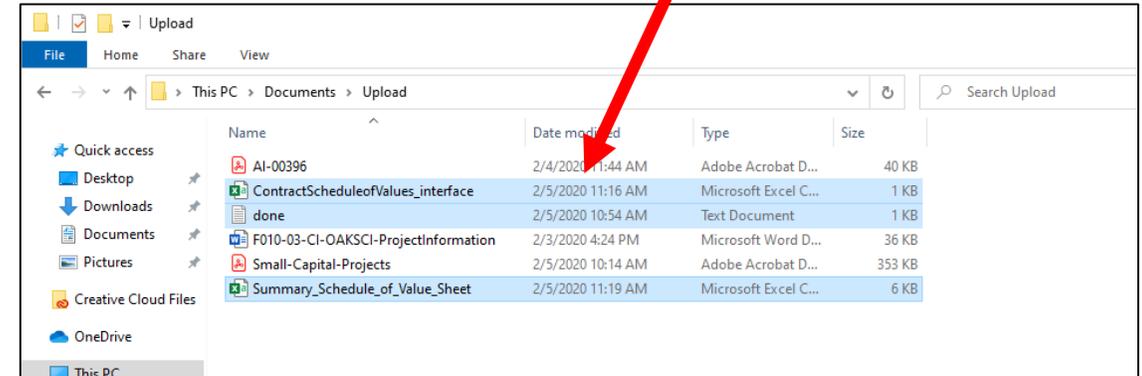
- ▶ A new window will appear for you to add files
- ▶ Click **Browse** to choose files for upload



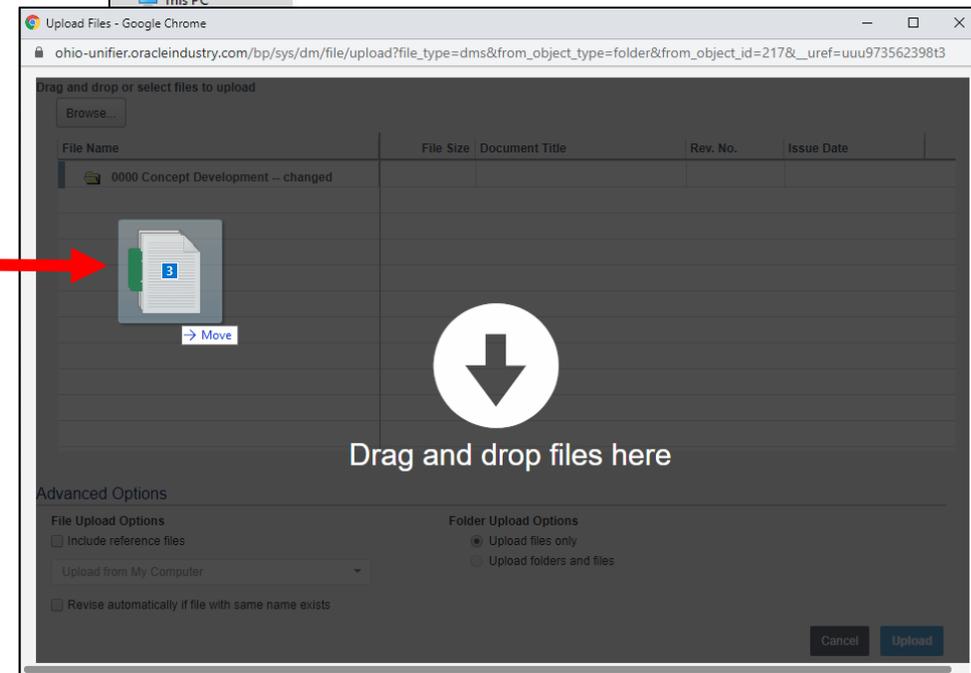
Drag and Drop files

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

Choose your folder of Documents or Select Multiple Documents

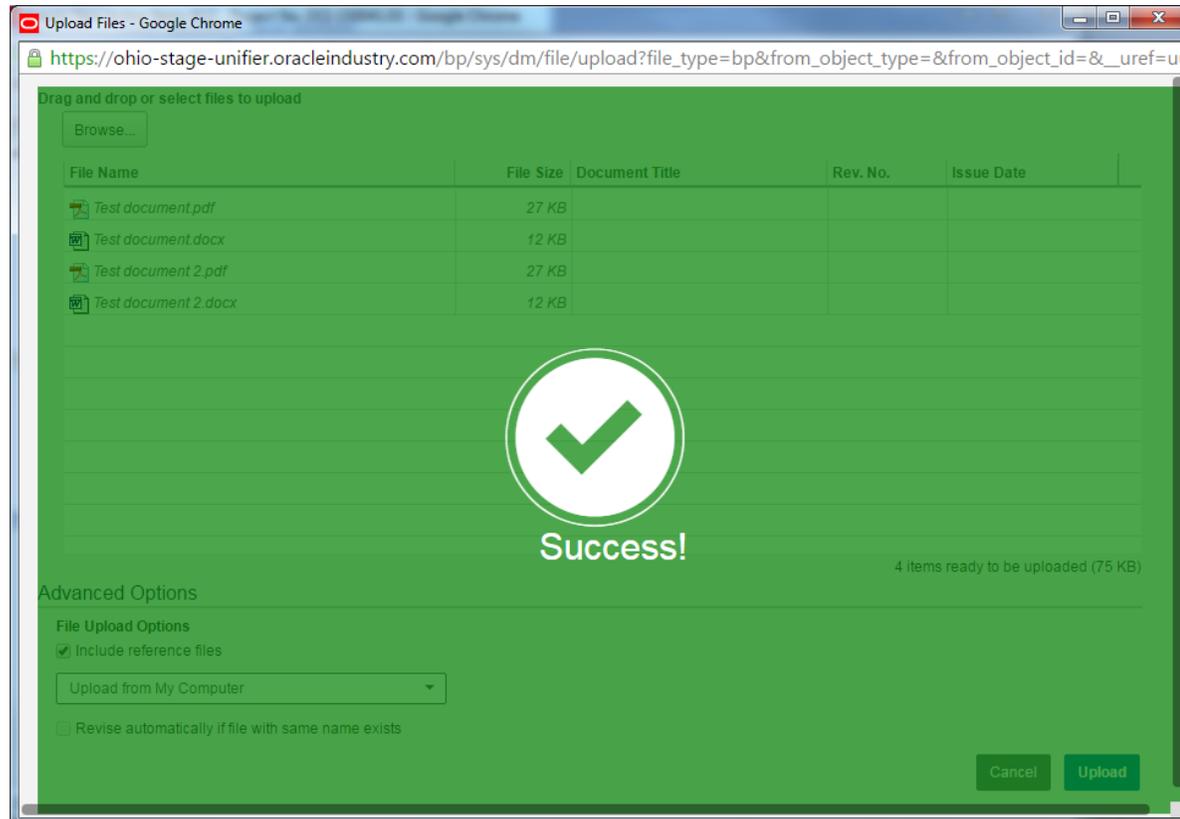


Drag and Drop the documents into the Upload Files window



Adding Documents

- ▶ If all folders and files have been added, you will see a green “Success!” screen



Upload Documents

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

Upload Files - Google Chrome

ohio-unifier.oracleindustry.com/bp/sys/dm/file/upload?file_type=dms&from_object_type=folder&from_object_id=216&_uref=uuu973562398t3

Drag and drop or select files to upload

Browse...

| File Name | File Size | Document Title | Rev. No. | Issue Date |
|--|-----------|----------------|----------|------------|
| Project Documents | | | | |
| ContractScheduleofValues_interface.csv | 1 KB | | | |
| done.txt | 1 KB | | | |
| Summary_Schedule_of_Value_Sheet - Copy.csv | 6 KB | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

3 items ready to be uploaded (7 KB)

Advanced Options

File Upload Options

Include reference files

Upload from My Computer

Revise automatically if file with same name exists

Folder Upload Options

Upload files only

Upload folders and files

Cancel Upload

View Documents

- ▶ The window will close, and you will receive a message that your files have been uploaded
- ▶ Click the **Refresh** button to see the new files

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'ORACLE Primavera Unifier' and breadcrumb navigation: 'Company Work...' > 'Agency' > 'Agency General...'. A left sidebar contains navigation options like Alerts, Tasks, E-Signatures, Drafts, Mailbox, Information, Cost Manager, Data Manager, Document Manager, Documents (highlighted), Recycle Bin, Unpublished Docum..., Logs, and Reports. The main area is titled 'Documents' and shows a list of folders and files. A red box highlights the toolbar area, which includes a 'View' dropdown set to 'All', a 'Refresh' button (circular arrow icon), and other icons. A tooltip message is displayed over the Refresh button, stating: 'Files or folders have been successfully uploaded to the currently open Document Manager. To see the changes, click Refresh'. Below the toolbar is a table with columns for Name, Issue Date, and other details.

| Name | Issue Date | Issue Date |
|-----------------------------|------------|------------------|
| 0000 Concept Developme... | | |
| 0100 Acquisition | | |
| 0200 Design | | |
| 0300 Construction | | |
| 0400 Post Construction | | |
| 0500 Extra Services | | |
| 0600 Budget | | |
| Chrysanthemum.jpg | 859 KB | 08/30/2016 12... |
| Clear Browsing Data.docx | 886 KB | 09/01/2016 12... |
| Construction Phase DB Tr... | 26 MB | 02/09/2017 06... |
| Desert.jpg | 827 KB | 08/30/2016 12... |
| Penguins.jpg | 760 KB | 09/02/2016 11... |

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211