



Professional Services Agreement Create



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 - 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 shows the user's email address "uuuu600419530". The page content includes a search bar with the text "DPS-" and a dropdown menu displaying a list of projects. The projects are listed in a table with columns for Name, Number, and Location. A red box highlights the search bar, and a red arrow points to the search results.

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 Agreement Create (A/E)

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

The screenshot displays the Oracle Primavera Unifier (Development) interface. The left-hand navigation menu is open, with the 'Logs' option circled in red. Below 'Logs', the 'Professional Services Agreements' option is highlighted with a red bar and a red arrow pointing to it. The main content area on the right shows the 'Professional Services Agreement' page, with the '+ Create' button circled in red. The page title is 'Professional Services Agreement' and the breadcrumb trail is 'Agency > OAKS CI Training > OAKS CI Training'. A table below the title shows one entry: 'Test Agreement #1'. The bottom right corner of the page indicates 'Total: 1'.

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

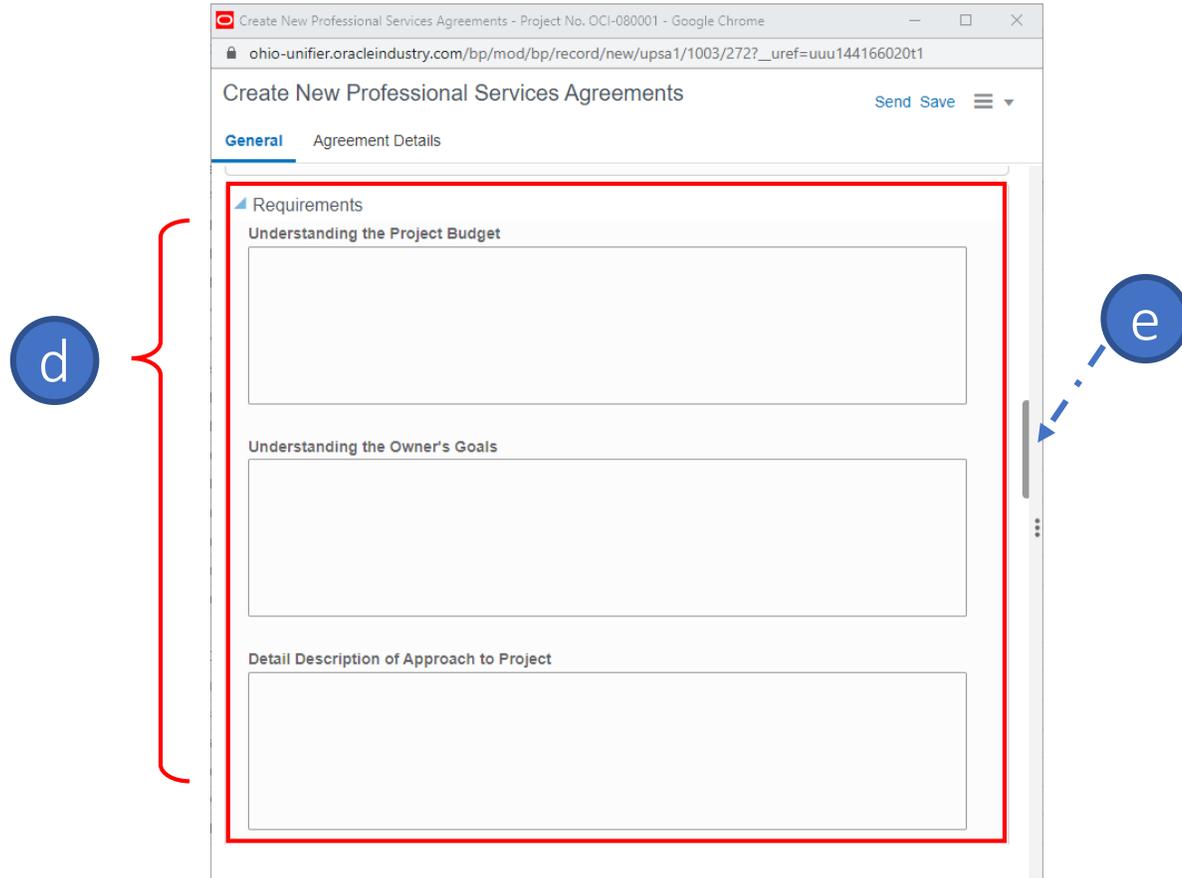
Vendor Information

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



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

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

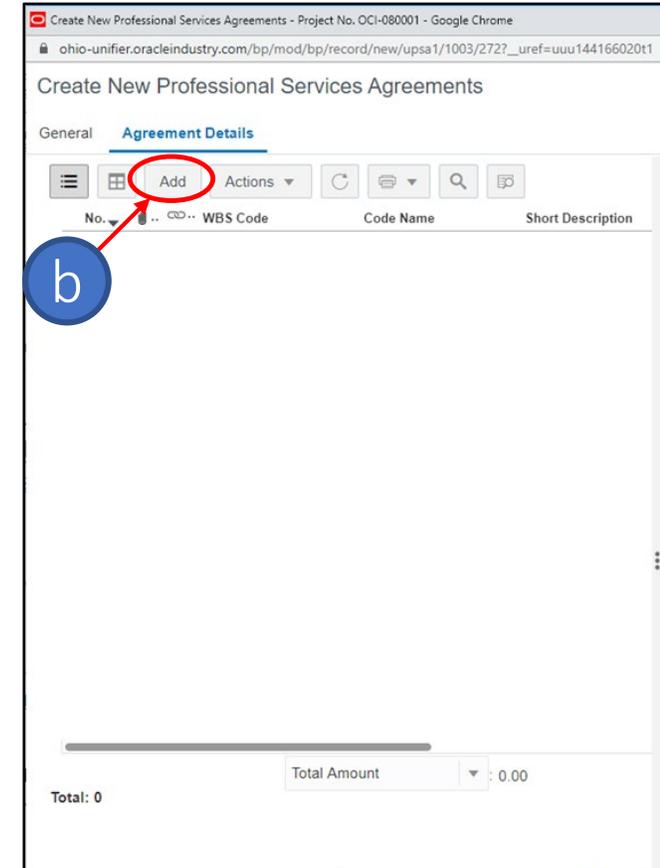
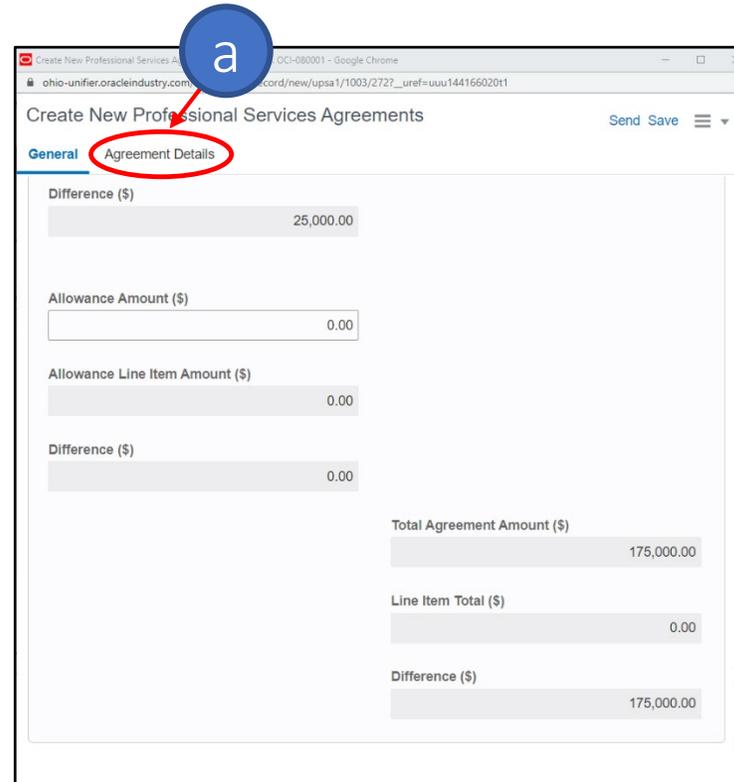
Line Item Total (\$) 0.00

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 'Line Item Details' section is expanded. Under the 'General' tab, the 'WBS Code' field is highlighted with a blue circle labeled 'c'. A red arrow points from this circle to a small downward-pointing arrow next to the 'WBS Code' input field, indicating that it is a dropdown menu.

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 of the dialog box. The dialog box displays a list of CBS Codes and their corresponding CBS Names. The list is as follows:

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

At the bottom of the dialog box, there is a 'Total: 343' label and two buttons: 'Cancel' and 'Select'.



Professional Services Agreement – Create (A/E)

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

Screenshot of the 'CBS Picker' dialog box. The table lists various CBS codes and names. The 'AE-00-00' row is highlighted with a red circle, and a blue circle with the letter 'e' has a red arrow pointing to it. A blue circle with the letter 'f' is positioned to the right of the dialog box.

CBS Code	CBS Name
▶ PA-00-00	Property Acquisition Summary
▶ RM-00-00	Relocation and Moving Summary
▶ LE-00-00	Legal Expense Summary
▶ OR-00-00	Owner Expense Summary
▶ AE-00-00	Professional Design Summary
▶ RF-00-00	Regulatory Fees Summary
▶ CM-00-00	Construction Management Summary
▶ CE-00-00	Construction Execution Summary
▶ Cx-00-00	Commissioning Summary
▶ FE-00-00	F F and E Summary
▶ AA-00-00	Acquisition of Art Summary
▶ PM-00-00	Project Management Summary
▶ ES-00-00	Energy Services Summary
▶ ID-00-00	Interior Design Summary

Total: 343

Cancel Select

Screenshot of the 'CBS Picker' dialog box showing a detailed view of the 'AE-BS-CD' category. The 'AE-BS-CD' row is highlighted in blue. A red circle highlights the 'Select' button at the bottom right, with a blue circle containing the letter 'g' and a red arrow pointing to it. A blue circle with the letter 'f' is positioned to the left of the dialog box.

CBS Code	CBS Name
▶ PA-00-00	Property Acquisition Summary
▶ RM-00-00	Relocation and Moving Summary
▶ LE-00-00	Legal Expense Summary
▶ OR-00-00	Owner Expense Summary
▶ AE-00-00	Professional Design Summary
▶ AE-AE-00	Professional Design General
▶ AE-BS-00	AE Basic Services
▶ AE-BS-BA	AE Bid and Award Services
▶ AE-BS-BE	AE Basic Services Budget
▶ AE-BS-CA	AE Construction Admin Services
▶ AE-BS-CD	AE Construction Docs Services
▶ AE-BS-CL	AE Closeout Services
▶ AE-BS-CN	AE Conformed Docs Services
▶ AE-BS-DD	AE Design Development Services
▶ AE-BS-PD	AE Pre Design Services
▶ AE-BS-SD	AE Schematic Design Services
▶ AE-AS-00	AE Additional Services
▶ AE-RE-00	AE Reimbursable Expense

Total: 343

Cancel 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 details:

- 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?:
- Fee Category (Enter all \$ to 1 category):
 - Basic Services Amount (\$): 100,000.00
 - Basic Services (%): 100
 - Reimbursable Cost Amount (\$): 0.00
 - Additional Services Amount (\$): 0.00
 - Allowance Amount (\$): 0.00

Example 2

Example 2 screenshot details:

- WBS Code: AE-AS-TI
- Code Name: AE Tests and Inspections
- Short Description: Tests and Inspections
- Professional Services EDGE Certified?: No
- Subcontractor/Supplier: Type a Subcontractor/Supplier...
- EDGE Certified?:
- Fee Category (Enter all \$ to 1 category):
 - Basic Services Amount (\$): 0.00
 - Basic Services (%): 0
 - Reimbursable Cost Amount (\$): 50,000.00
 - Additional Services Amount (\$): 0.00
 - Allowance Amount (\$): 0.00



Professional Services Agreement – Create (A/E)

- ▶ Line Items will populate under Agreement Details

The screenshot displays the 'Create New Professional Services Agreements' interface. The main table lists three line items, with the first row (001) highlighted in red. The right sidebar shows the 'Line Item Details' for the selected row, including fields for WBS Code, Code Name, Short Description, and other details.

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):

- 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?:



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)

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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

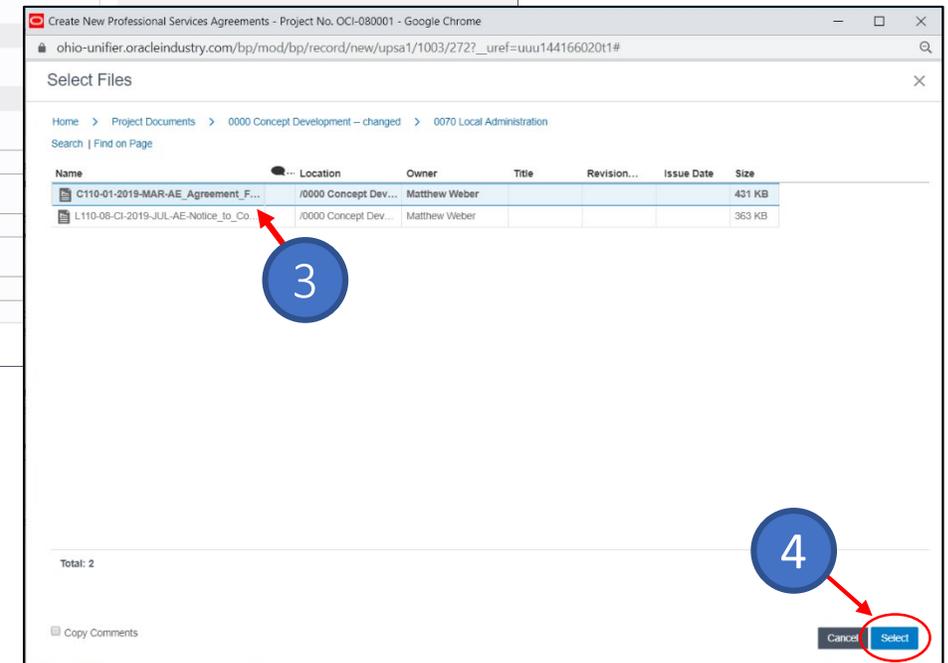
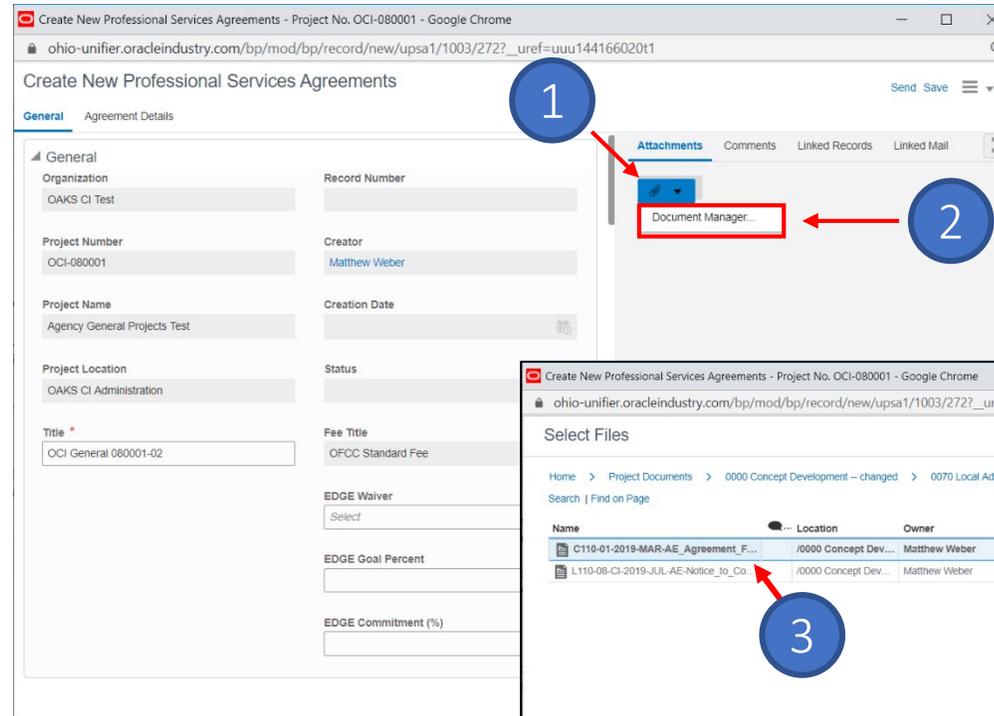
Difference (\$) 0.00



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**

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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

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Create New Professional Services Agreements - Workflow Action Details

General Agreement Details

Workflow Action Details

Workflow Actions *
Submit

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

Send For
Technical Proposal Review and

CC
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211

