OAKS
Capital Improvements

Introduction to OAKS CI

K-12 Cloud

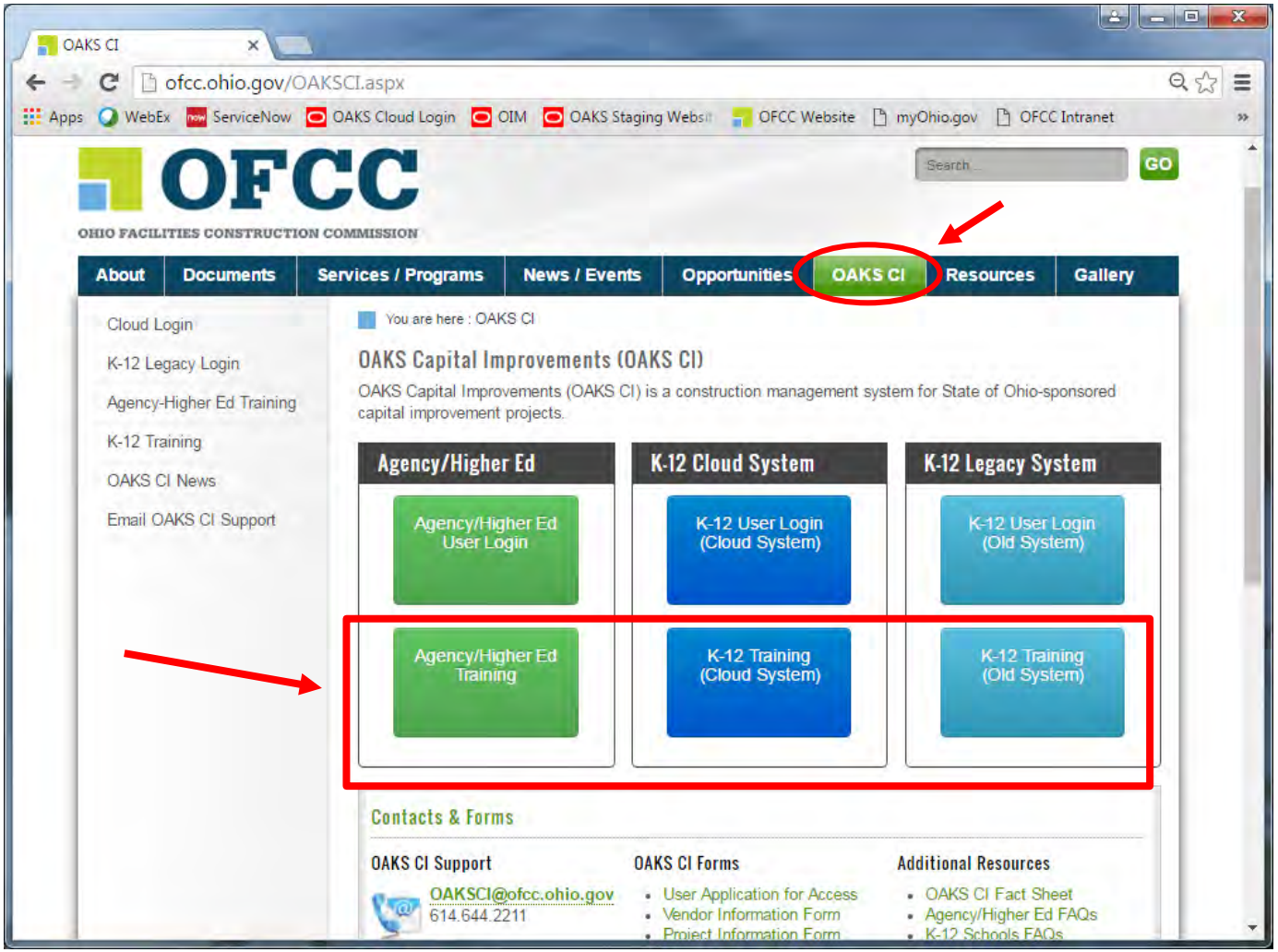
OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

Browser Information

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

Job Aids

- For additional reference materials visit our website ofcc.ohio.gov
  - Click: OAKS CI –> Choose an Appropriate training



What does OAKS CI do for you?

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

Using OAKS CI in the Cloud – Important Links

- OAKS CI is now housed in a cloud-based system at the following URL:
  - https://ohio-unifier.oracleindustry.com/bluedoor

- Passwords for OAKS CI are now housed in a separate system called Oracle Identity Manager (OIM) which can be accessed here:
  - https://ohio-primavera-idm.oracleindustry.com/oim

Oracle Identity Manager (OIM)

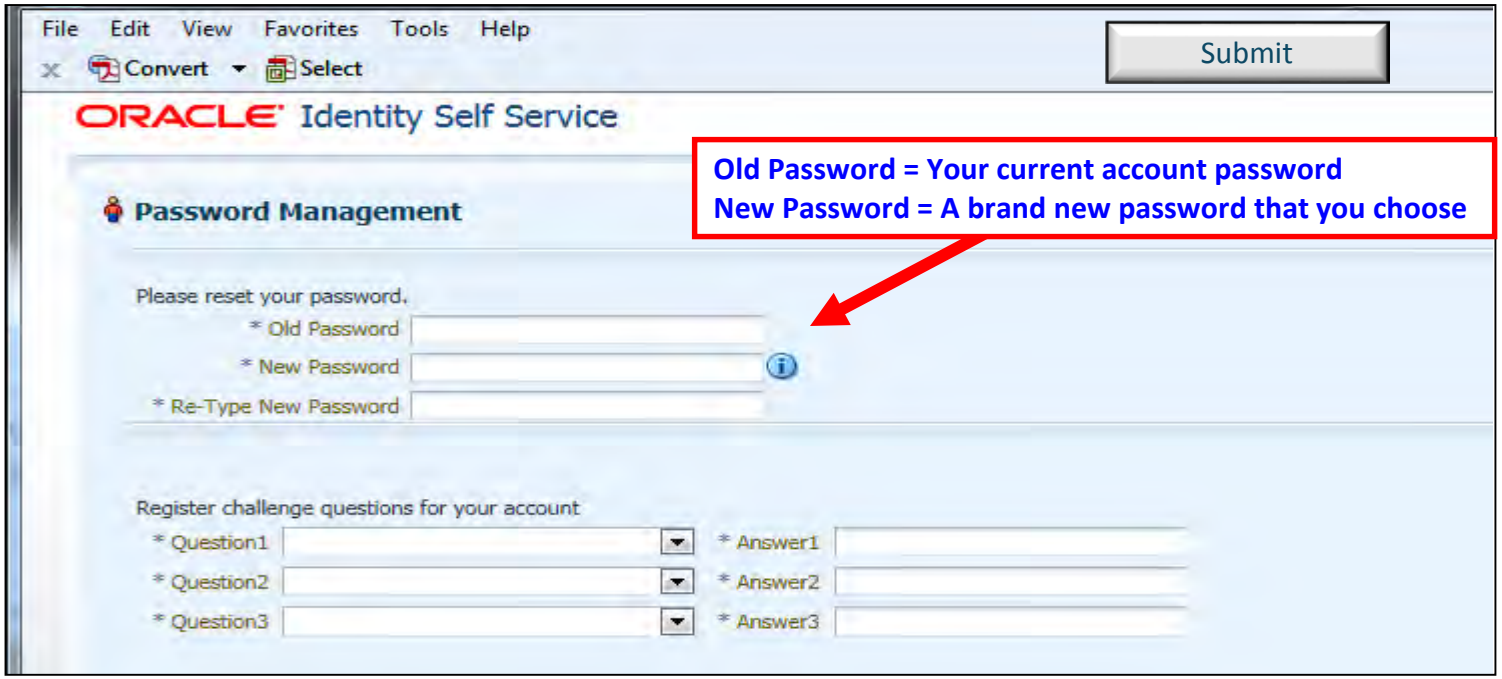
- To reset your password or to set your security questions, login to the OIM website: https://ohio-primavera-idm.oracleindustry.com/oim

- Type in your User ID and Password. This is the same as the login information you use for accessing OAKS CI.

- Click “Sign In”

Oracle Identity Manager (OIM)

- Once logged in, the system will prompt you to reset your password (if this is your first log in) and set your security questions
- Please be aware that your password will expire **every 60 days** and the system **will not** send you a reminder.
- Type in requested information and Click "Submit". Then Click "Sign Out" to log out of OIM



Note: You will only utilize this site to change your password.
No other OAKS CI functions will take place here.

Navigating OAKS CI in the Cloud

Navigate to OAKS CI

- Open any web browser

  Note: While testing we found that Google Chrome works best for us

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

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

Cross Project Home Page

ORACLE PRIMAVERA Unifier

Katie Tuttle ★ ? Sign Out

Home | Company Works... | School Facilities | Talawanda-CSD... | Brown - New K-...

Navigate To...

User | Admin

File Edit View Help

New Open Find

- Home
- Tasks
- Messages
- Drafts
- uMail
- Master Log - Business Proces...

Announcements:

Title: Welcome

Welcome to the OAKS CI Training Environment.

Title: Security Notification

OAKS-CI is a State of Ohio computer system, which may be accessed and used only for official state business by authorized persons. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action

Items Requiring Your Attention:

Tasks: **12** Total, **4** New, 0 Late

Messages: **1** New

Draft Records: **19** New

uMails: **0** New

Tasks or New uMails:

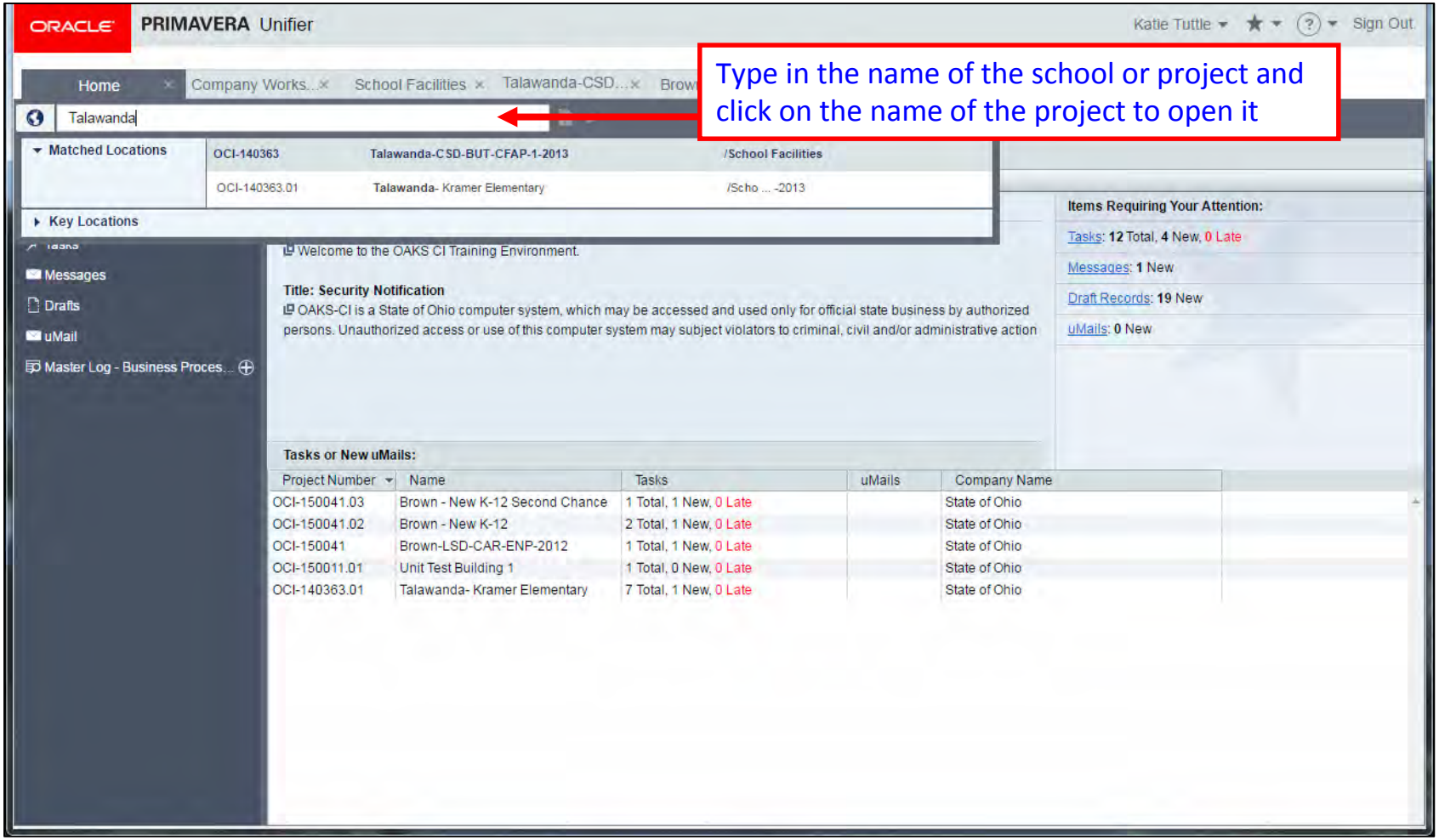
Project Number	Name	Tasks	uMails	Company
OCI-150041.03	Brown - New K-12 Second Chance	1 Total, 1 New, 0 Late		State of Ohio
OCI-150041.02	Brown - New K-12	2 Total, 1 New, 0 Late		State of Ohio
OCI-150041	Brown-LSD-CAR-ENP-2012	1 Total, 1 New, 0 Late		State of Ohio
OCI-150011.01	Unit Test Building 1	1 Total, 0 New, 0 Late		State of Ohio
OCI-140363.01	Talawanda- Kramer Elementary	7 Total, 1 New, 0 Late		State of Ohio

Cross project tabs

Announcements

Projects with Active Tasks

Locating your Project



Type in the name of the school or project and click on the name of the project to open it

District Level Project and Building Level Project(s)

ORACLE PRIMAVERA Unifier

Katie Tuttle | Sign Out

Home | Company Works... | School Facilities | Talawanda-CSD... | Brown - New K-...

Navigate To... ▸ School Facilities ▸ Talawanda-CS... ▸

User | Admin

- Talawanda-CSD-BUT-CFAP-1...
- Alerts
- uMail
- Mailbox
- Collaboration
- Information
- Cost Manager
- Data Manager
- Document Manager
- Logs
- Reports

File Edit View Help | Details | Map View

Talawanda-CSD-BUT-CFAP-1-2013 - Home | View Dashboard: My Dashboard

Summary

Image

Items Requiring Your Attention

Tasks:	0, New 0, Late 0
Messages:	0 New
Draft Records:	0 New
uMails:	0 New

Details

OAKS Code:	OCI-140363
District Project Identifier:	Talawanda-CSD-BUT-CFAP-1-2013
Description:	Build new Kramer Elementary School
Administrator:	Katie Tuttle
Currency:	United States Dollar (USD)
Status:	Active
Email Address:	ohio_unifier_stage+1106@oracleindustry.com

Links

- Ohio Facilities Construction Commission
- Ohio School Facilities Commission

New | Open | Find | View: Building Project

Building Project - Current View: All

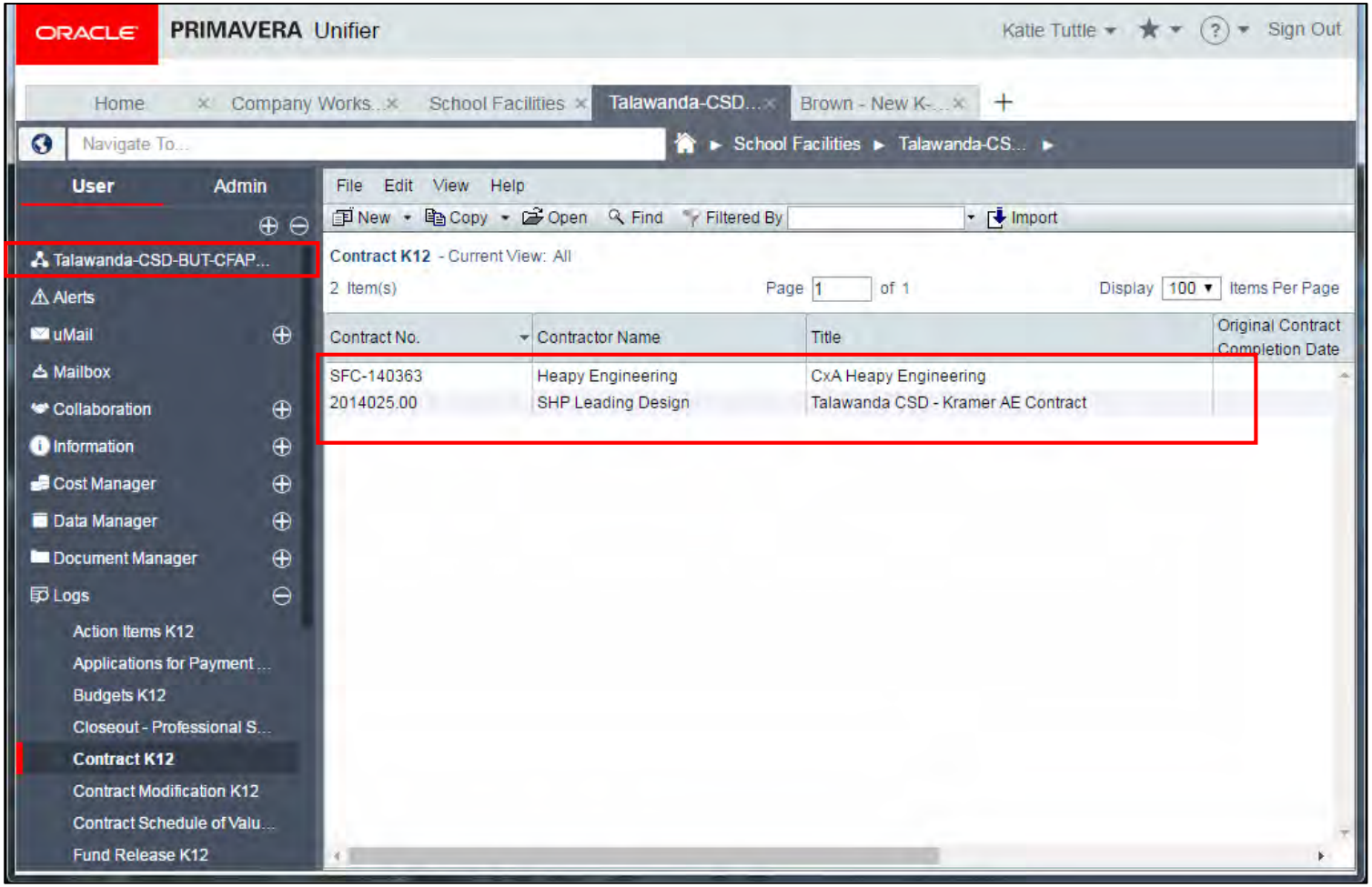
1 Item(s) | Page 1 of 1 | Display 100 Items Per Page

Number	Name	Setup Date	Setup Template	Status
OCI-140363.01	Talawanda- Kramer Elementary	08/31/2015	OSFC Building CMR Template	Active

Within your District Project, you will be able to locate your Building Project(s).

District Level Project

- The District Level Project houses all records related to your Professional Service Providers
- Such as: A/E, Commissioning Agent, Owner's Agent



Building Level Project

- The Building Level Project houses all records related to your CMR/Contractor

ORACLE PRIMAVERA Unifier

Katie Tuttle | Sign Out

Home | Company Works... | School Facilities | Talawanda- Kra... | Brown - New K-...

Navigate To... ▸ School Facilities ▸ Talawanda-CS... ▸ Talawanda- Kra...

User | Admin

File Edit View Help

New | Copy | Open | Find | Filtered By | Import

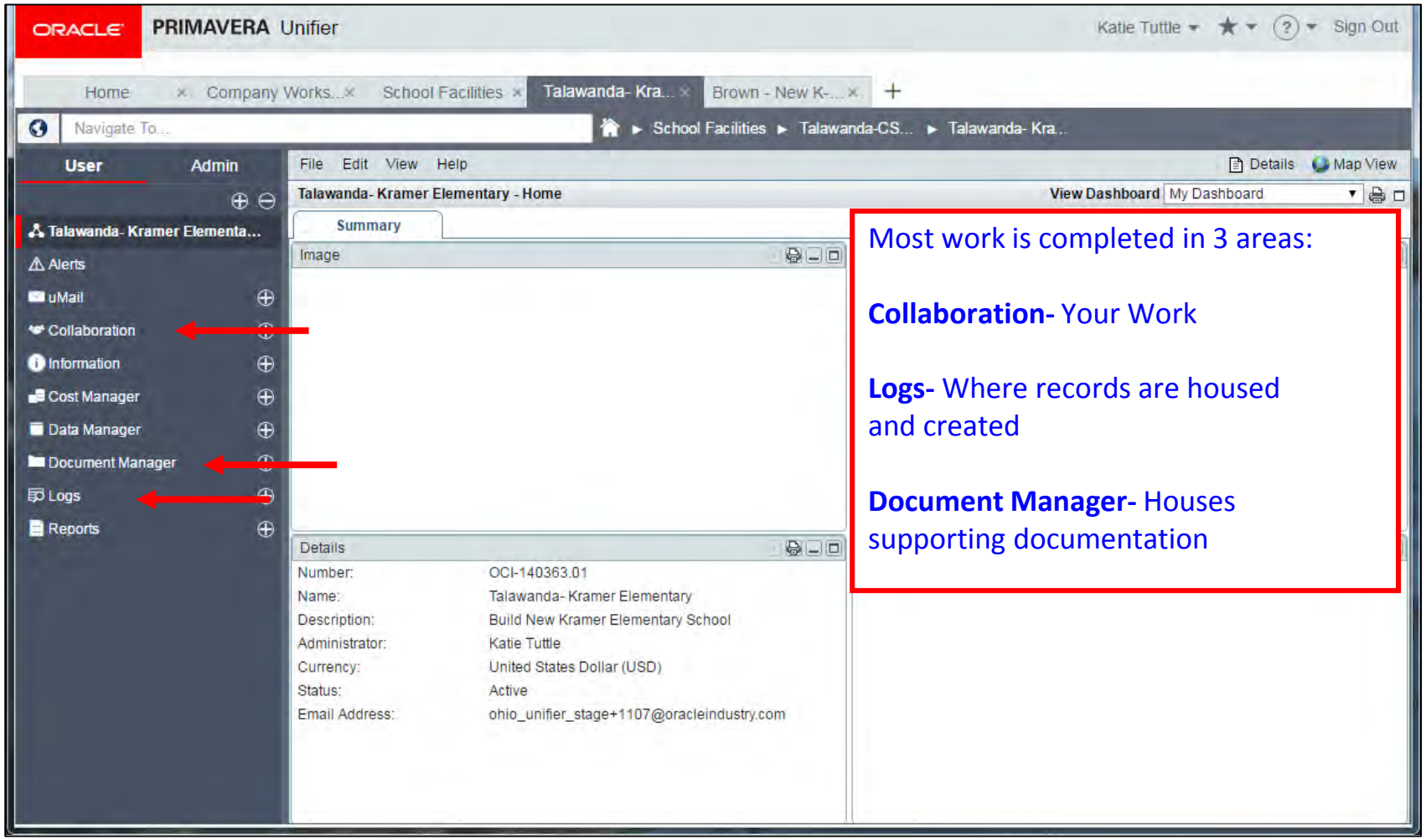
- Talawanda- Kramer Elemen...
- Alerts
- uMail
- Collaboration
- Information
- Cost Manager
- Data Manager
- Document Manager
- Logs
  - Action Items K12
  - Advertisements K12
  - Applications for Payment ...
  - Budgets K12
  - Certified Payrolls K12
  - Closeout - Contractor K12
  - Contract K12
  - Contract Modification K12
  - Contract Schedule of Valu...

Contract K12 - Current View: All

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

Contract No.	Contractor Name	Title	Original Contract Completion Date
SFC-140363.01-CMR	Robertson Construction Services, Inc	Robertson Construction - CMR	01/22/2015
65555555	Robertson Construction Services, Inc	Katie's Contracting	

Project Home Page



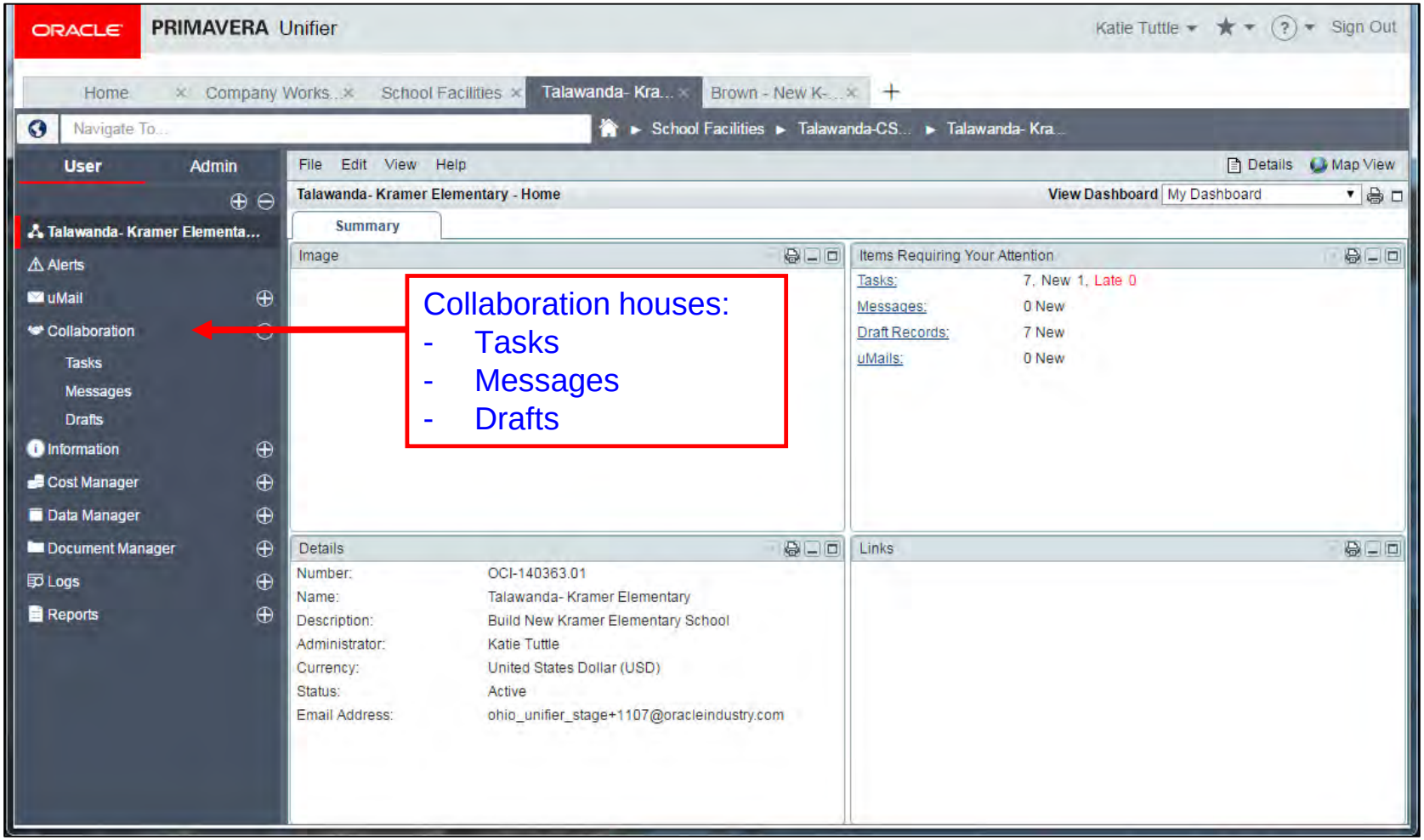
Most work is completed in 3 areas:

Collaboration- Your Work

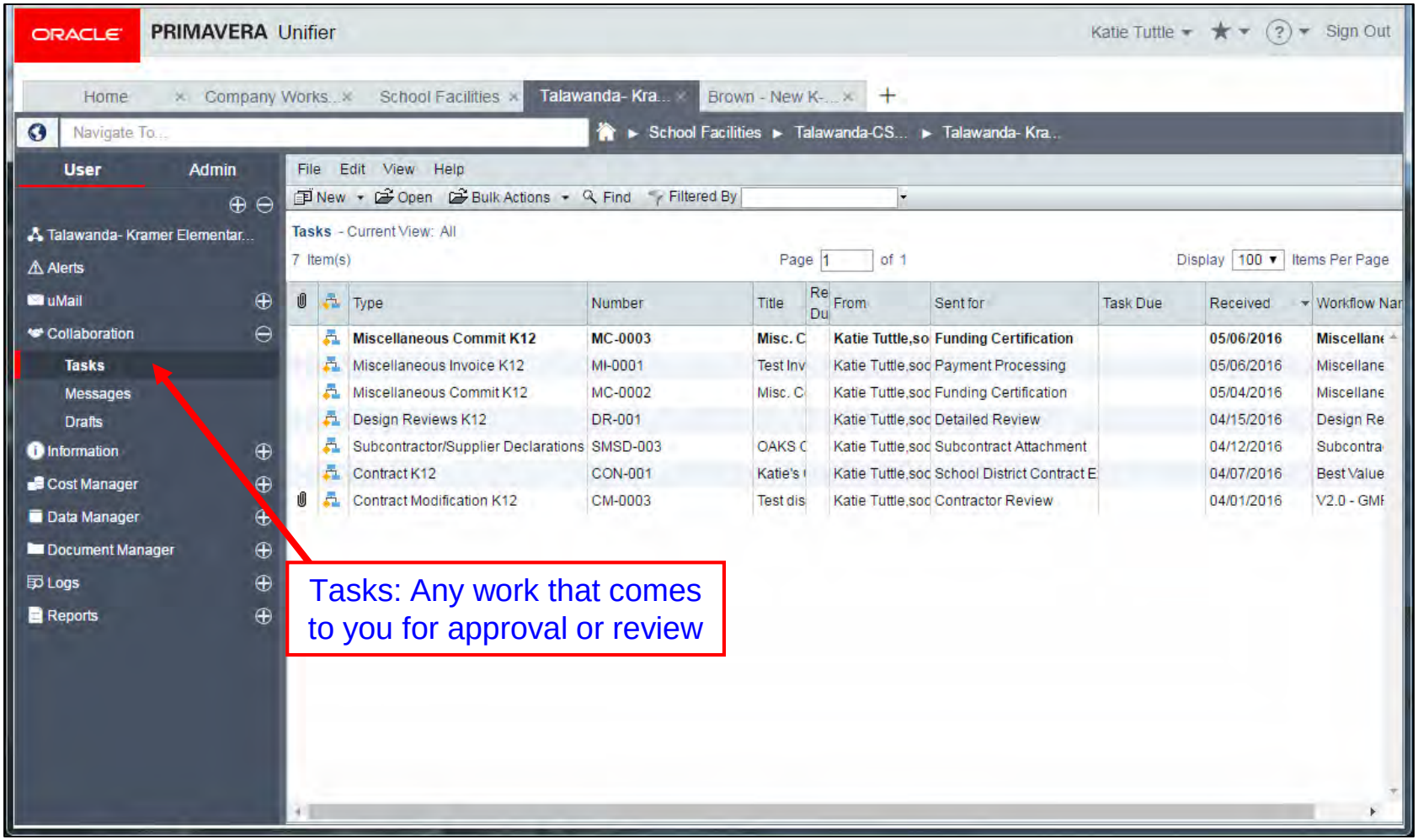
Logs- Where records are housed and created

Document Manager- Houses supporting documentation

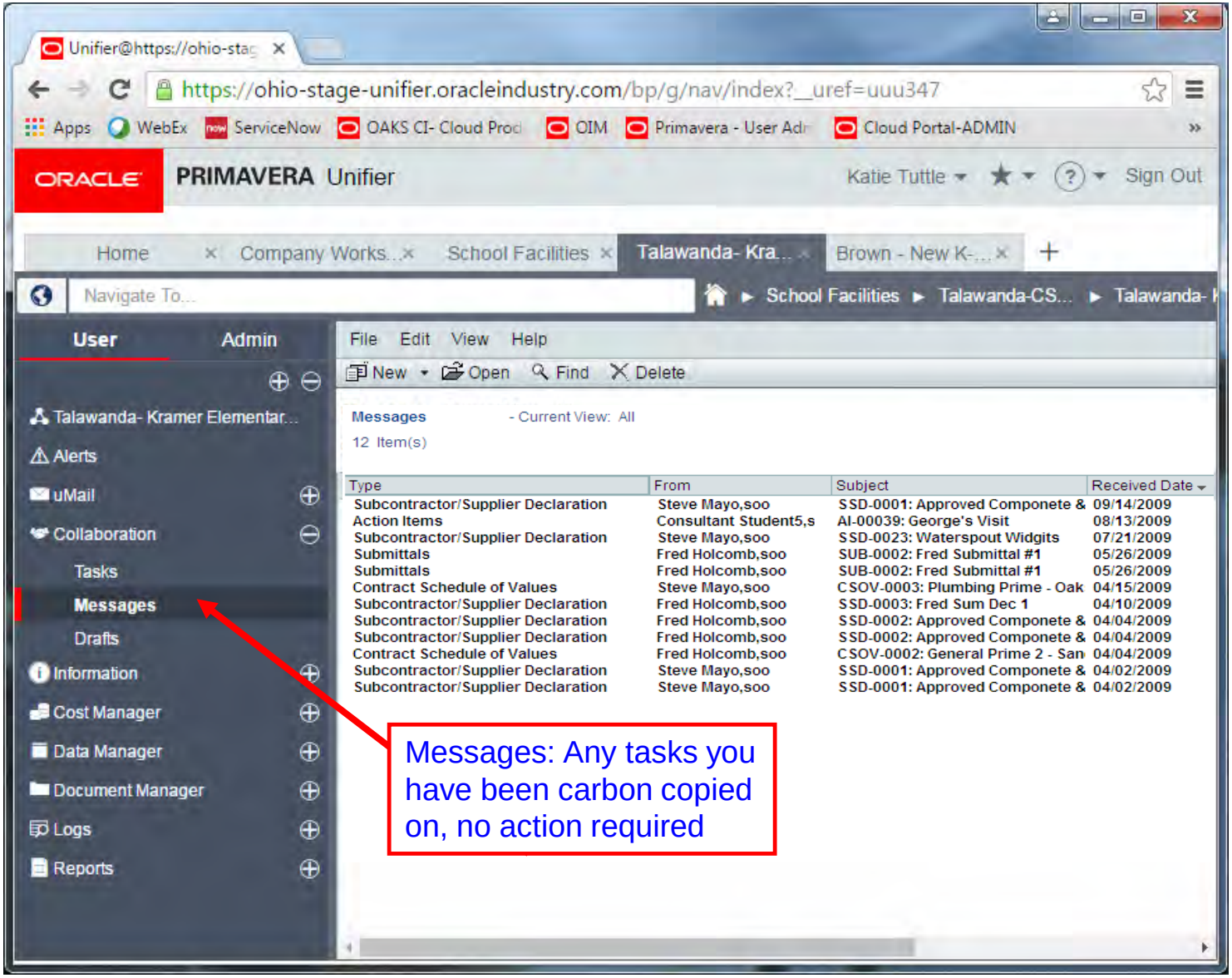
Collaboration– All About You!



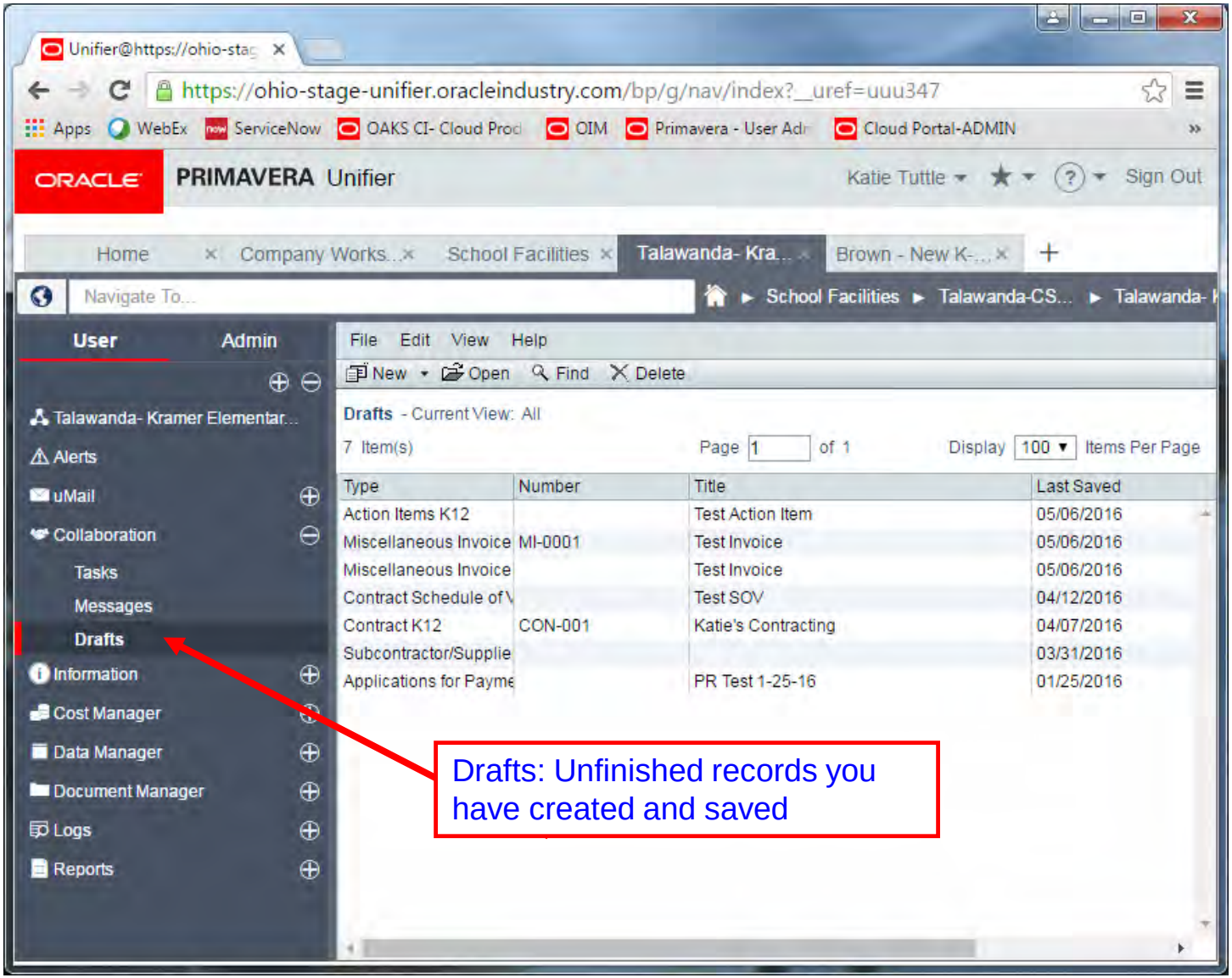
Tasks (Your Records)



Messages


Unifier@https://ohio-stag
https://ohio-stage-unifier.oracleindustry.com/bp/g/nav/index?_uref=uuu347
Apps WebEx ServiceNow OAKS CI- Cloud Proc OIM Primavera - User Adr Cloud Portal-ADMIN
ORACLE PRIMAVERA Unifier
Katie Tuttle Sign Out
Home Company Works... School Facilities Talawanda- Kra... Brown - New K-...
Navigate To...
School Facilities ▸ Talawanda-CS... ▸ Talawanda-
User Admin
File Edit View Help
New Open Find Delete
Talawanda- Kramer Elementar...
Alerts
uMail
Collaboration
Tasks
Messages
Drafts
Information
Cost Manager
Data Manager
Document Manager
Logs
Reports
Messages - Current View: All
12 Item(s)
Type From Subject Received Date
Subcontractor/Supplier Declaration Steve Mayo,soo SSD-0001: Approved Componete & 09/14/2009
Action Items Consultant Student5,s AI-00039: George's Visit 08/13/2009
Subcontractor/Supplier Declaration Steve Mayo,soo SSD-0023: Waterspout Widgits 07/21/2009
Submittals Fred Holcomb,soo SUB-0002: Fred Submittal #1 05/26/2009
Submittals Fred Holcomb,soo SUB-0002: Fred Submittal #1 05/26/2009
Contract Schedule of Values Steve Mayo,soo CSOV-0003: Plumbing Prime - Oak 04/15/2009
Subcontractor/Supplier Declaration Fred Holcomb,soo SSD-0003: Fred Sum Dec 1 04/10/2009
Subcontractor/Supplier Declaration Fred Holcomb,soo SSD-0002: Approved Componete & 04/04/2009
Subcontractor/Supplier Declaration Fred Holcomb,soo SSD-0002: Approved Componete & 04/04/2009
Contract Schedule of Values Fred Holcomb,soo CSOV-0002: General Prime 2 - San 04/04/2009
Subcontractor/Supplier Declaration Steve Mayo,soo SSD-0001: Approved Componete & 04/02/2009
Subcontractor/Supplier Declaration Steve Mayo,soo SSD-0001: Approved Componete & 04/02/2009
Messages: Any tasks you have been carbon copied on, no action required

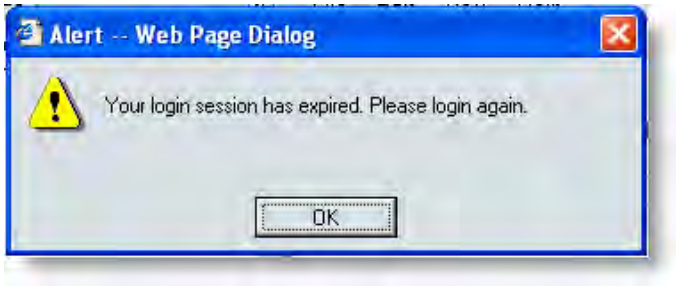
Drafts


Unifier@https://ohio-stag
https://ohio-stage-unifier.oracleindustry.com/bp/g/nav/index?_uref=uuu347
Apps WebEx ServiceNow OAKS CI- Cloud Proc OIM Primavera - User Adr Cloud Portal-ADMIN
ORACLE PRIMAVERA Unifier
Katie Tuttle Sign Out
Home Company Works... School Facilities Talawanda- Kra... Brown - New K-...
Navigate To...
School Facilities ▸ Talawanda-CS... ▸ Talawanda-
User Admin
File Edit View Help
New Open Find Delete
Talawanda- Kramer Elementar...
Alerts
uMail
Collaboration
Tasks
Messages
Drafts
Information
Cost Manager
Data Manager
Document Manager
Logs
Reports
Drafts - Current View: All
7 Item(s) Page 1 of 1 Display 100 Items Per Page
Type Number Title Last Saved
Action Items K12 Test Action Item 05/06/2016
Miscellaneous Invoice MI-0001 Test Invoice 05/06/2016
Miscellaneous Invoice Test Invoice 05/06/2016
Contract Schedule of V Test SOV 04/12/2016
Contract K12 CON-001 Katie's Contracting 04/07/2016
Subcontractor/Supplie 03/31/2016
Applications for Payme PR Test 1-25-16 01/25/2016
Drafts: Unfinished records you have created and saved

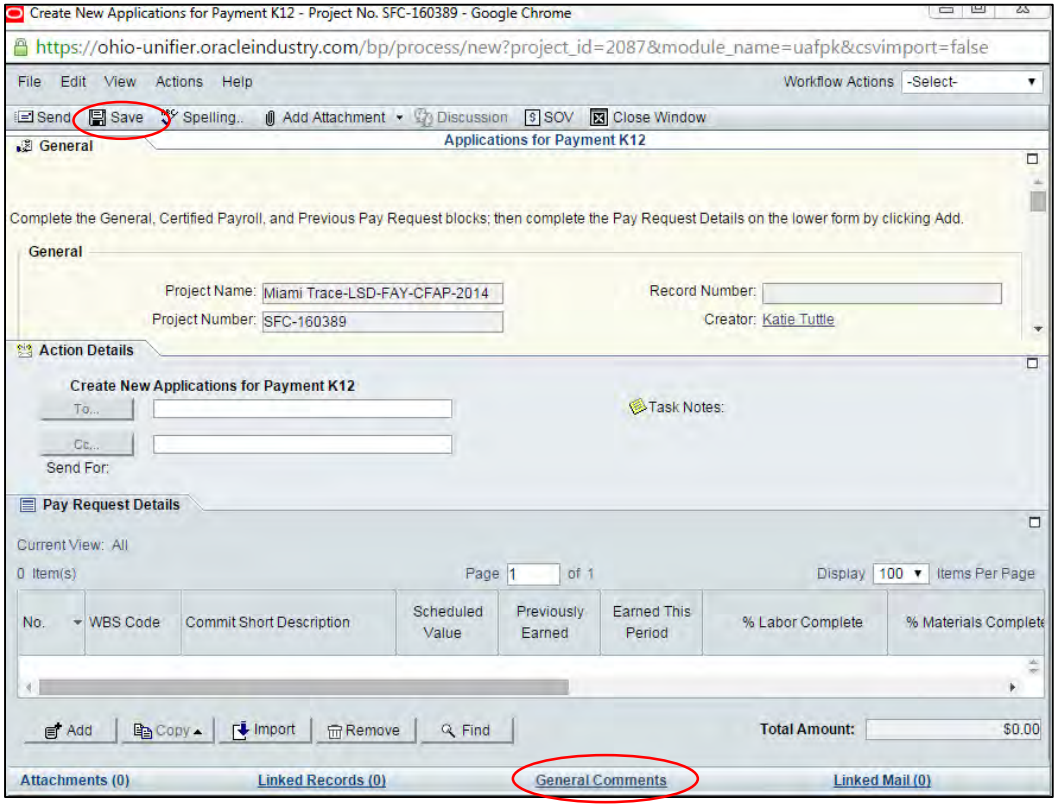
Drafts and Timeout

OAKS CI times out after 60 Minutes of Inactivity

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



Use "Save" if needed to save work as a draft



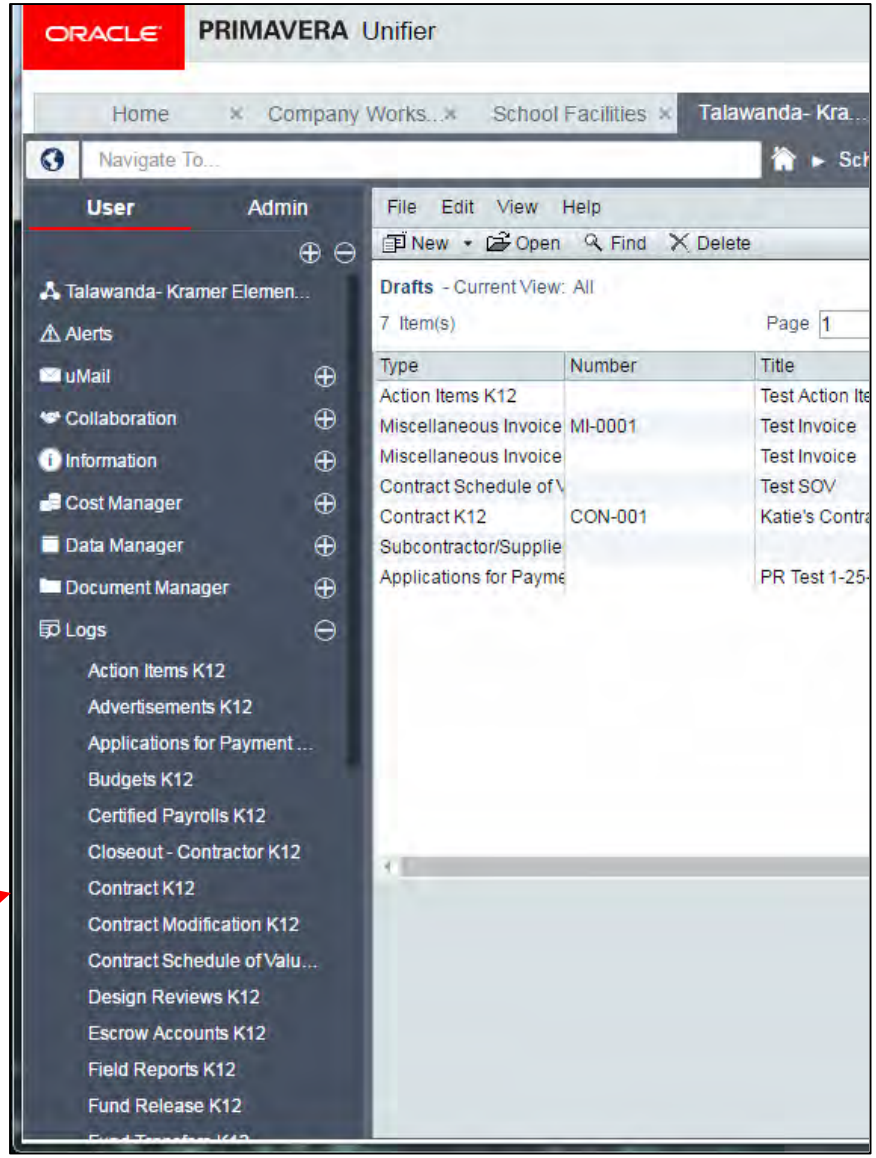
Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you're typing extensive notes, first type them in a Word doc then copy and paste into General Comments

Logs

Logs house Business Processes or "BPs" (Records)

- A BP is any Record that has been created (i.e. Pay Requests, Submittals, etc.) and submitted through a workflow for review or approval.

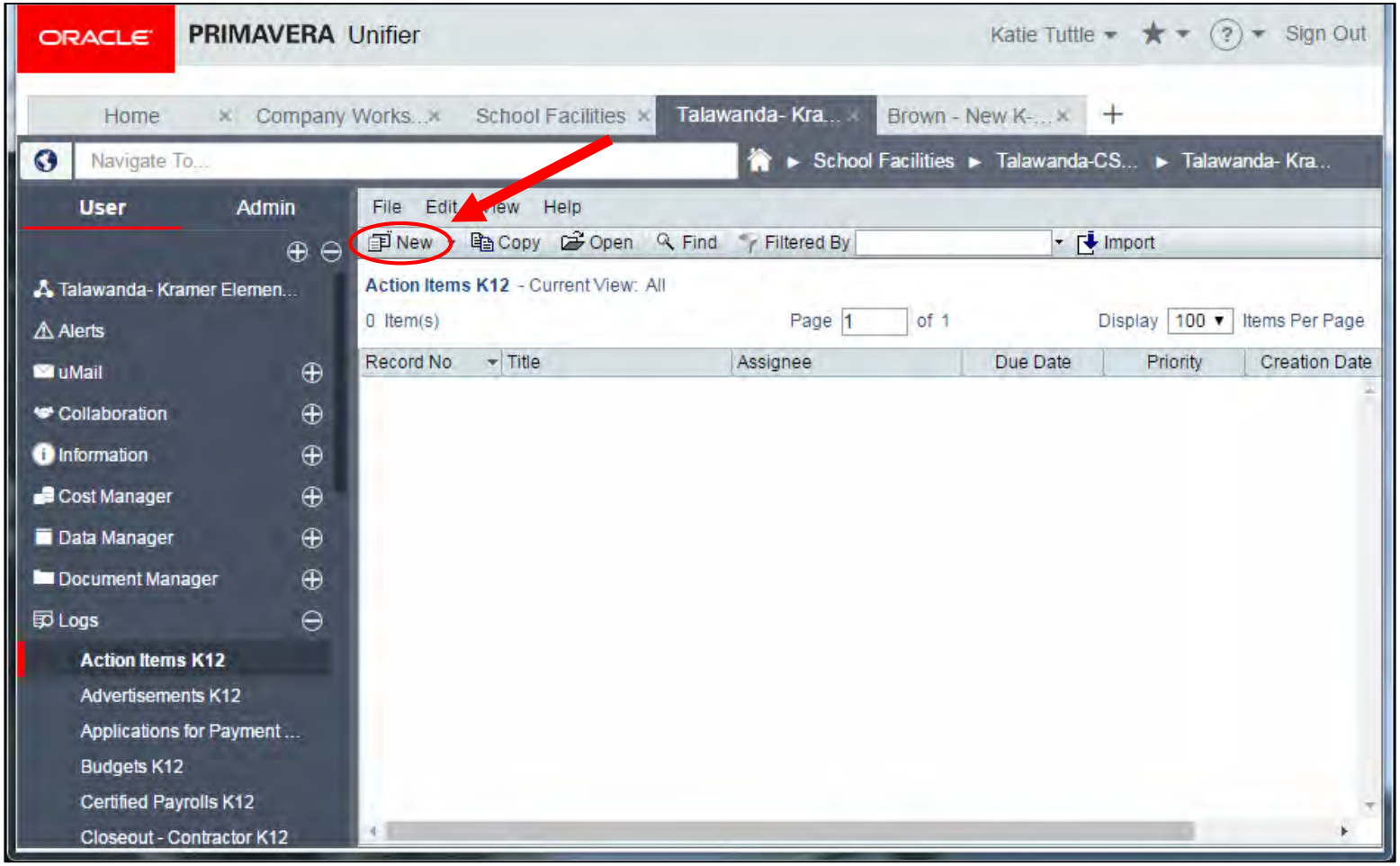
Users will see the types of BPs (Records) for which they have permissions



How do Records Work?

Create a Record

- In Logs, navigate to the record type you wish to create
- Click New



Create a Record

- Fill out all required information in the General Tab
  - Required information is marked with a red *

Create New Action Items K12 - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?project_id=1084&module_name=uaik&csvimport=false

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Undo Accept Task Add Attachment Close Window

Action Items | Action Items K12

General

Project Number: SFC-080001
Project Name: OAKS CI District Training Project 1
Organization Name: OAKS CI District Training Project - 1
Facility Name:
Title: Test Action Item *
Assignee: Katie Tuttle
Meeting Minute: Select...

Record Number:
Creator: Katie Tuttle
Creation Date:
Status:
Priority: Medium
Due Date:

Action

Action Requested: *

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

FilePath: Action Items
FilePath Suffix: Test Action Item
Publish Path: Action Items/ Test Action Item

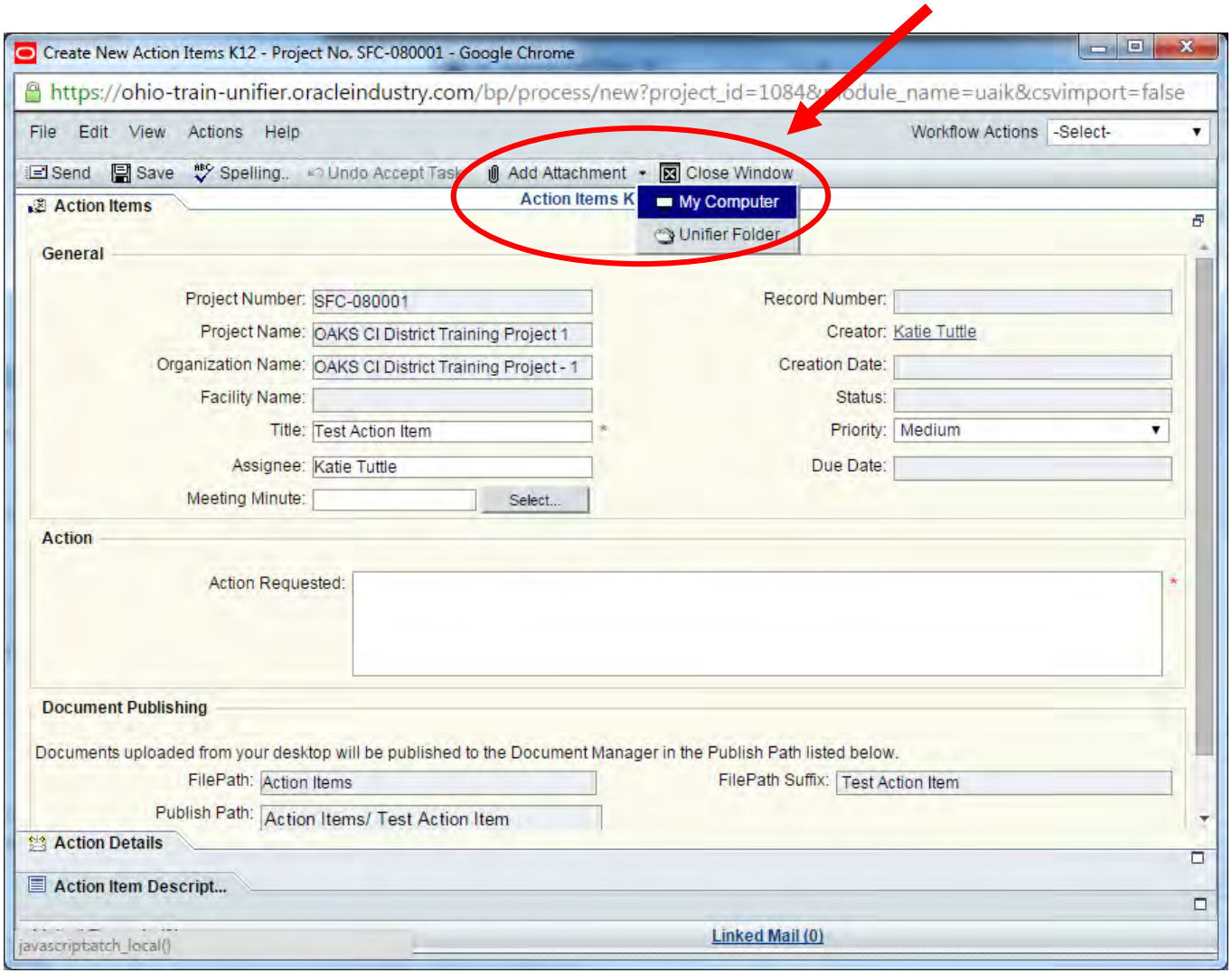
Action Details

Action Item Descript...

Linked Records (0) Linked Mail (0)

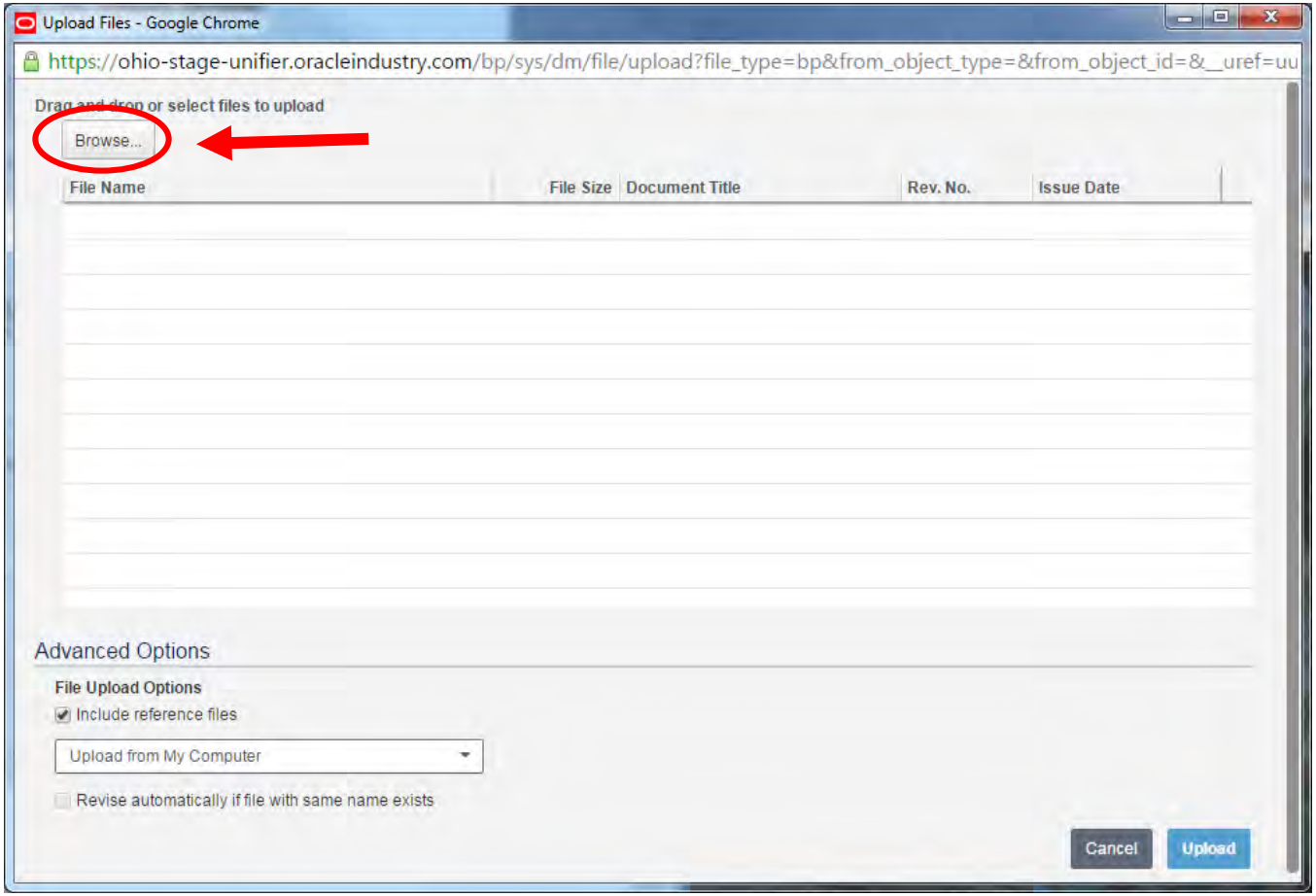
Attach Documents to your Record

- To attach documents to your record, click Add Attachment and choose **My Computer**



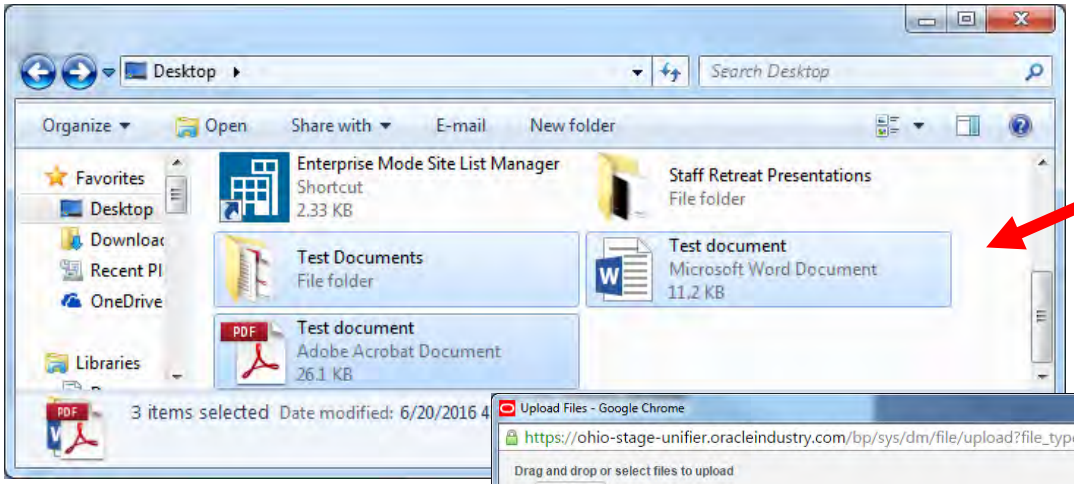
File Upload Window

- A new window will appear for you to add files
- Click Browse to choose files for upload



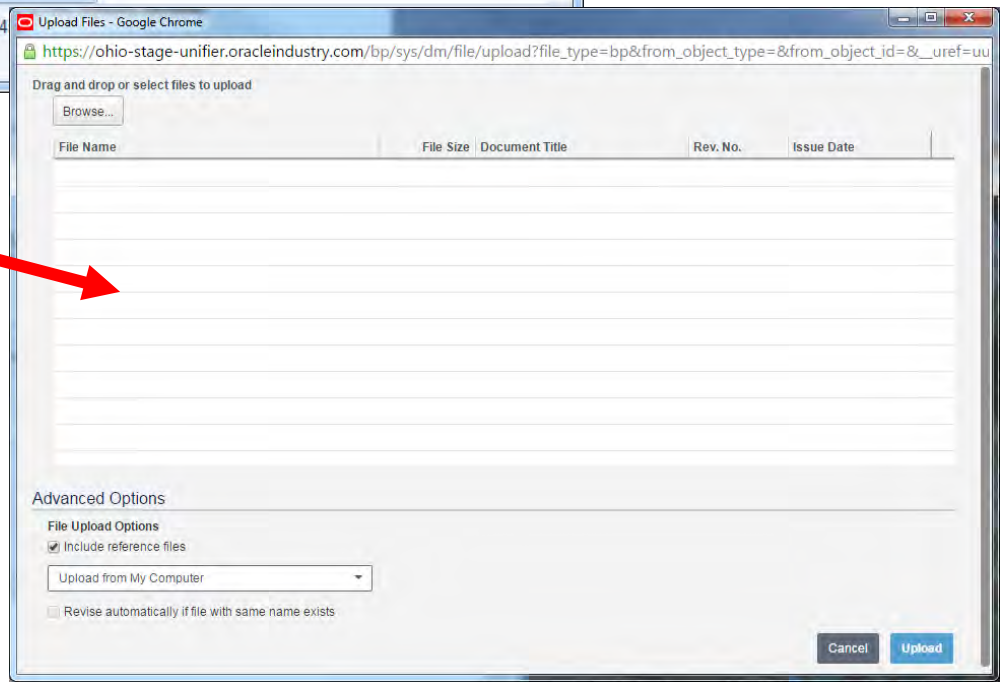
Drag and Drop files

- Find the folders and/or files your computer you want to upload
- Drag and Drop the documents into the Upload Files window



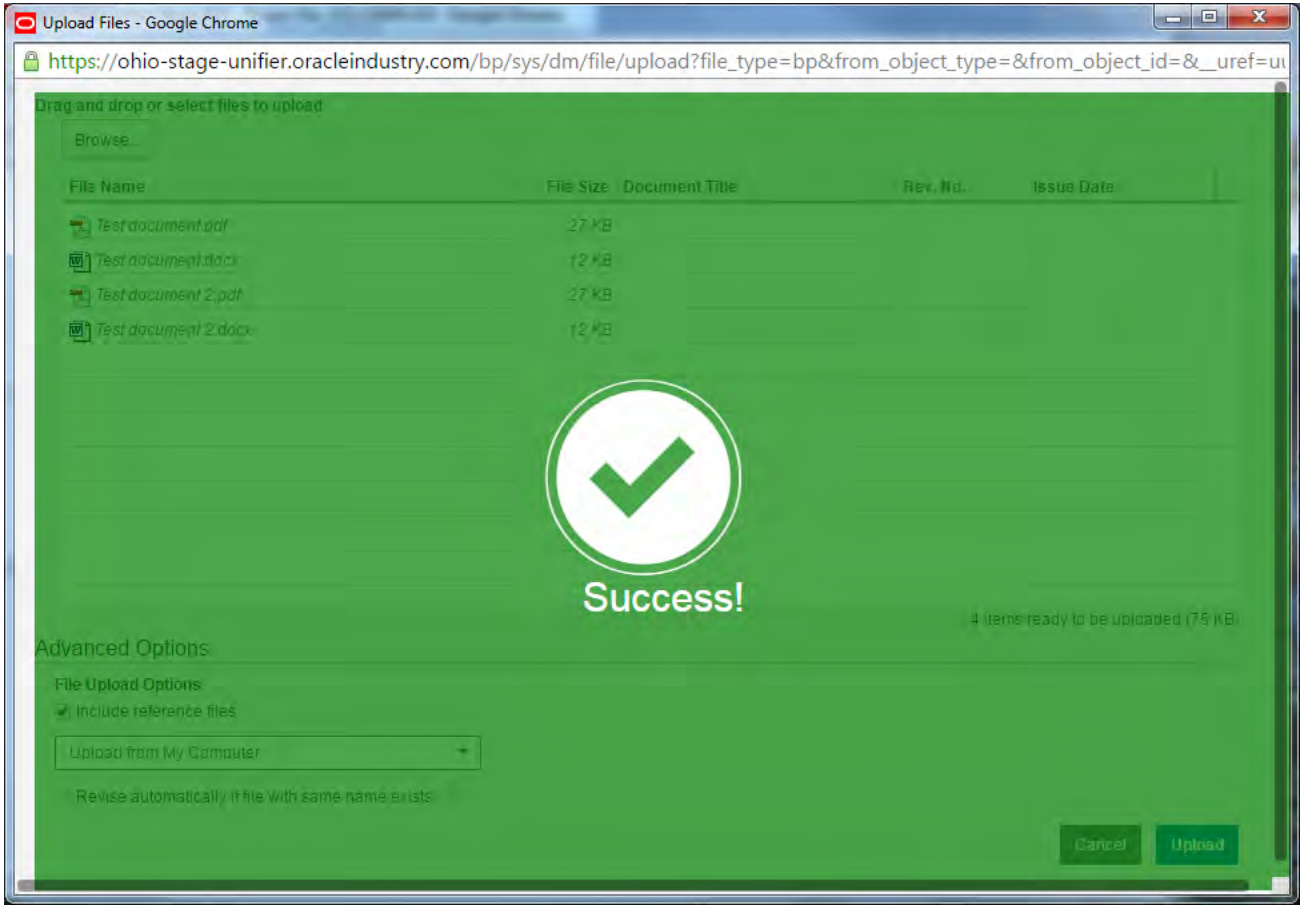
Choose your folder of Documents or Select Multiple Documents

Drag and Drop the documents into the Upload Files window



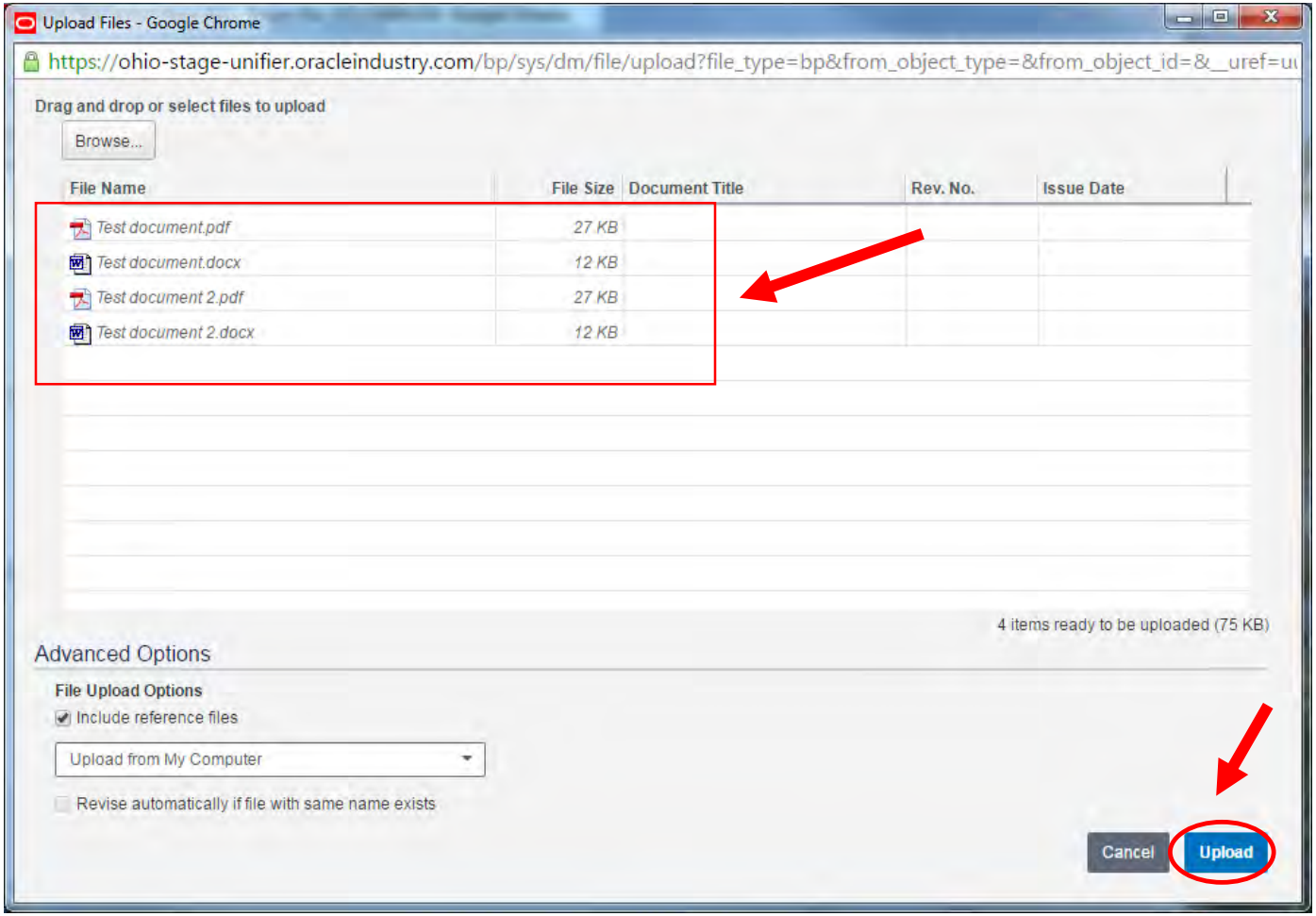
Adding Documents

- If all folders and files have been added, you will see a green “Success!” screen



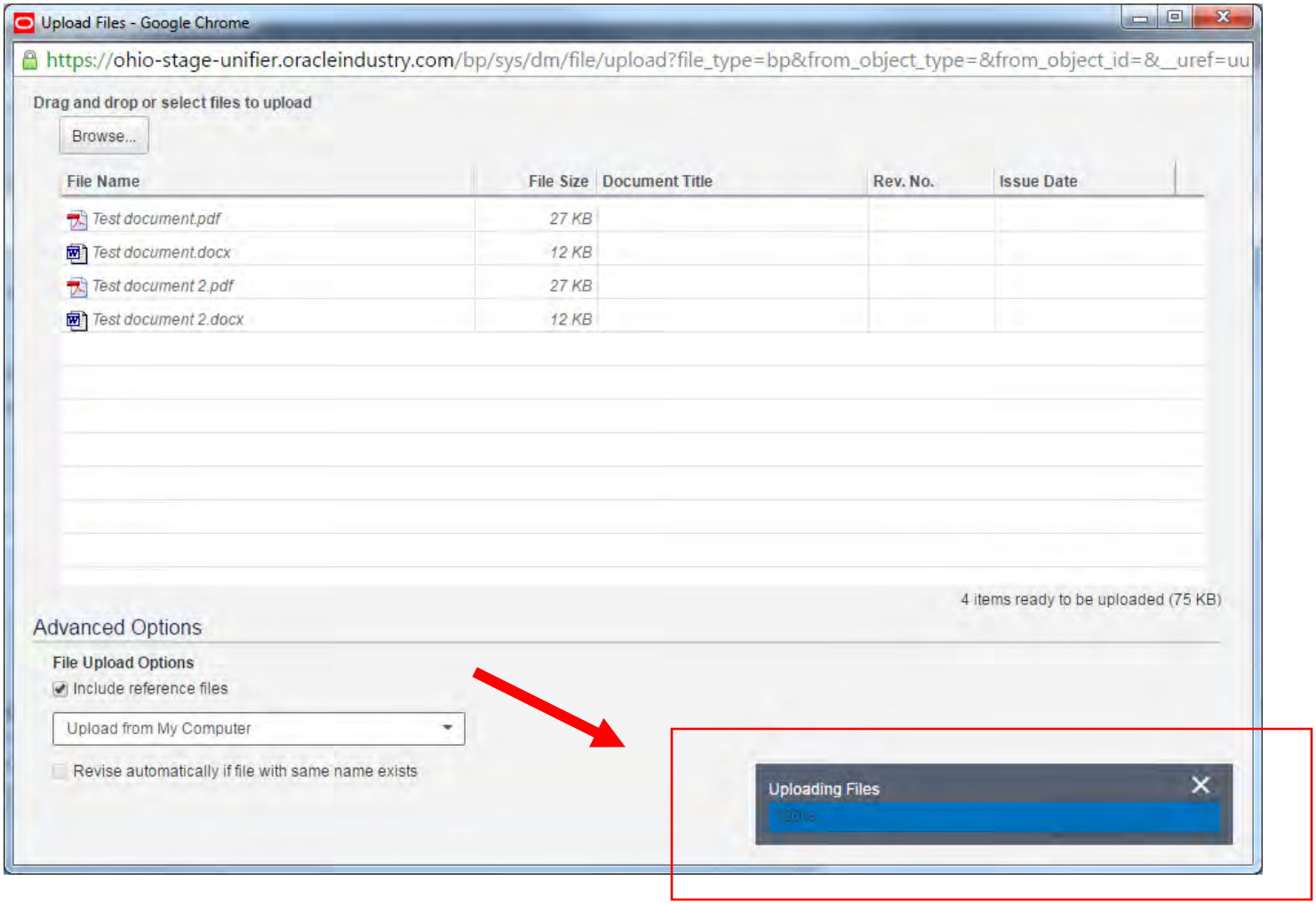
Upload Documents

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



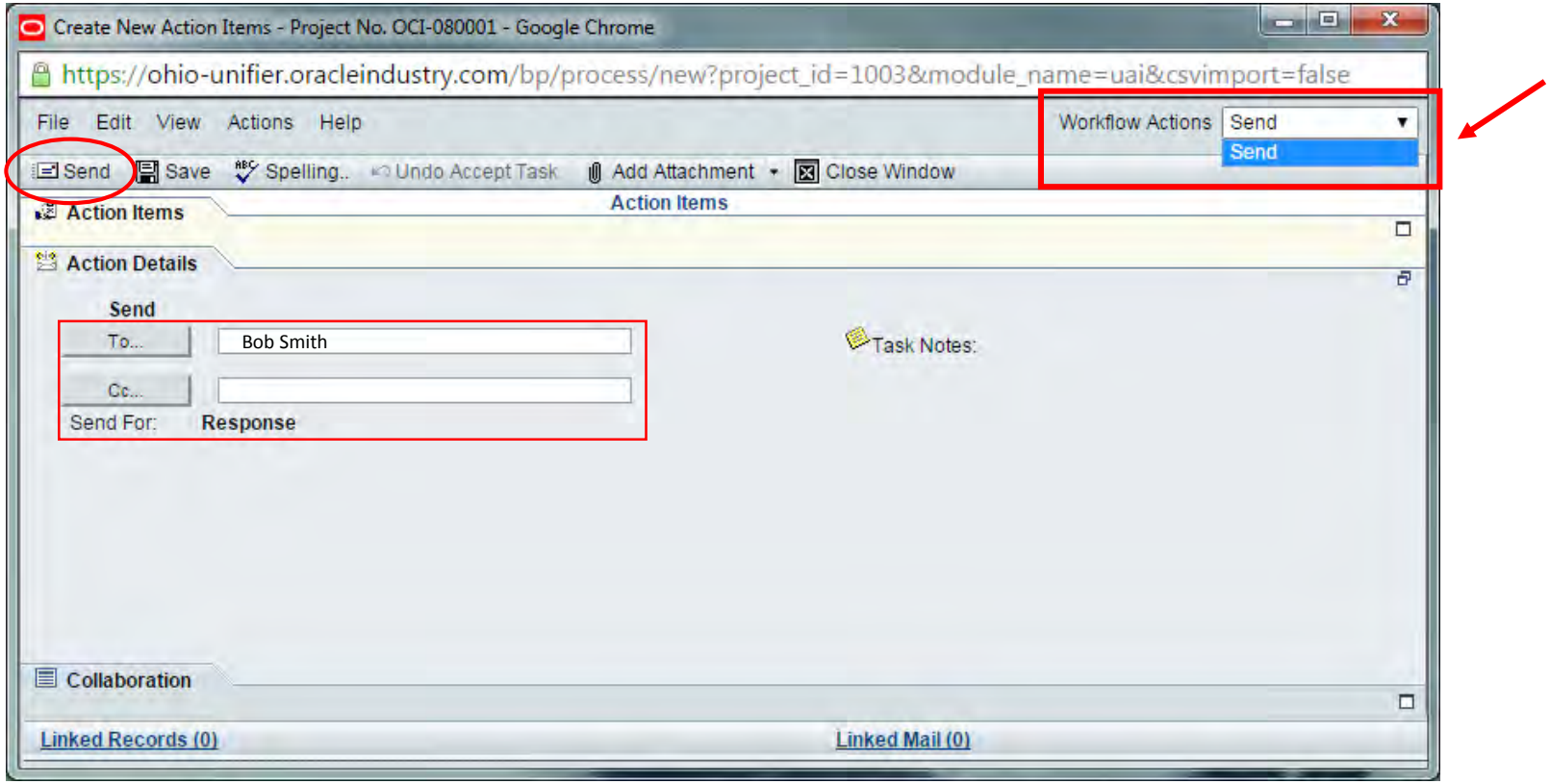
Upload Documents

- When all documents have finished uploading, you will see a 100% bar at the bottom of the screen



Send the Record

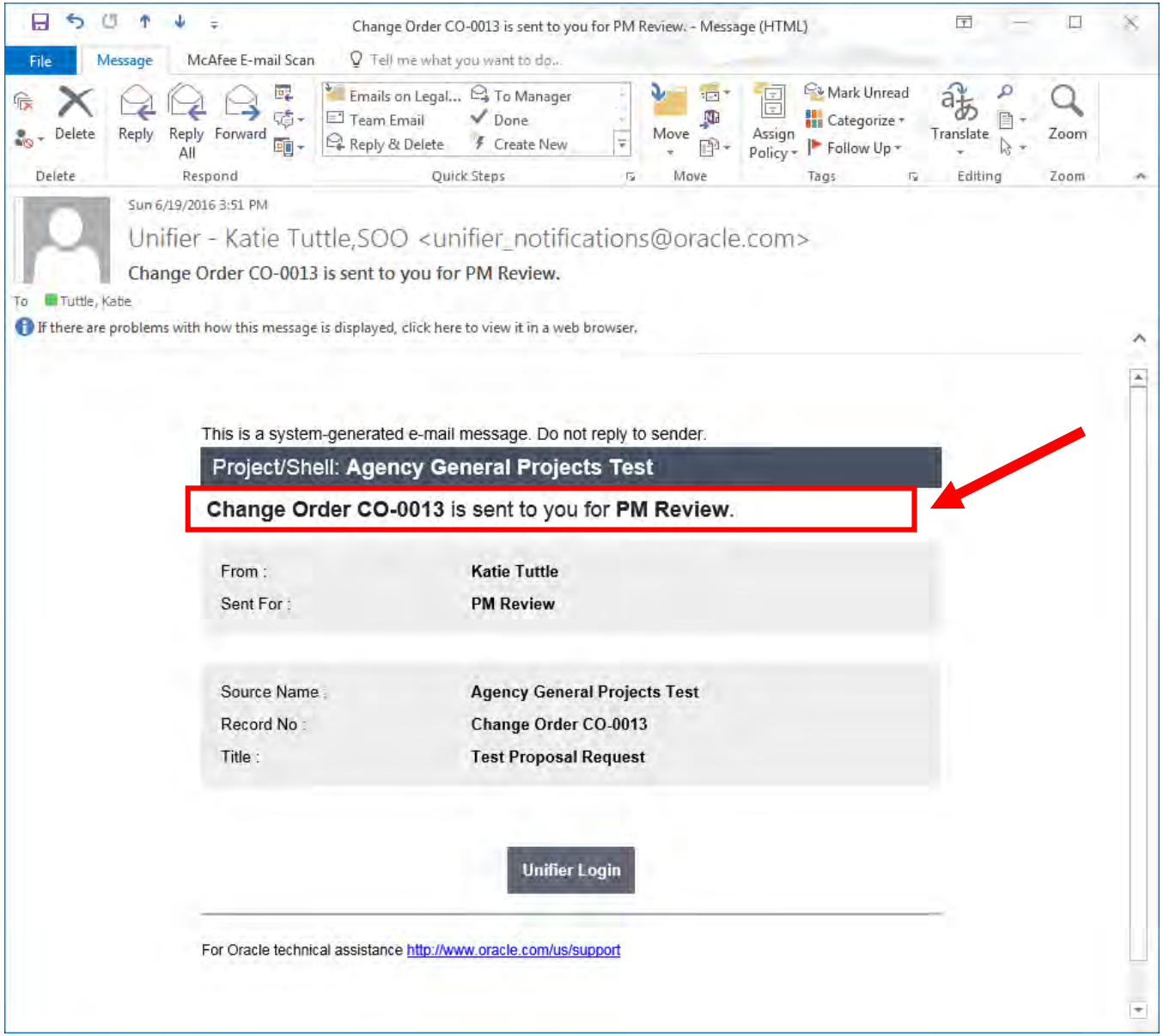
- Choose a Workflow Action
- Click Send



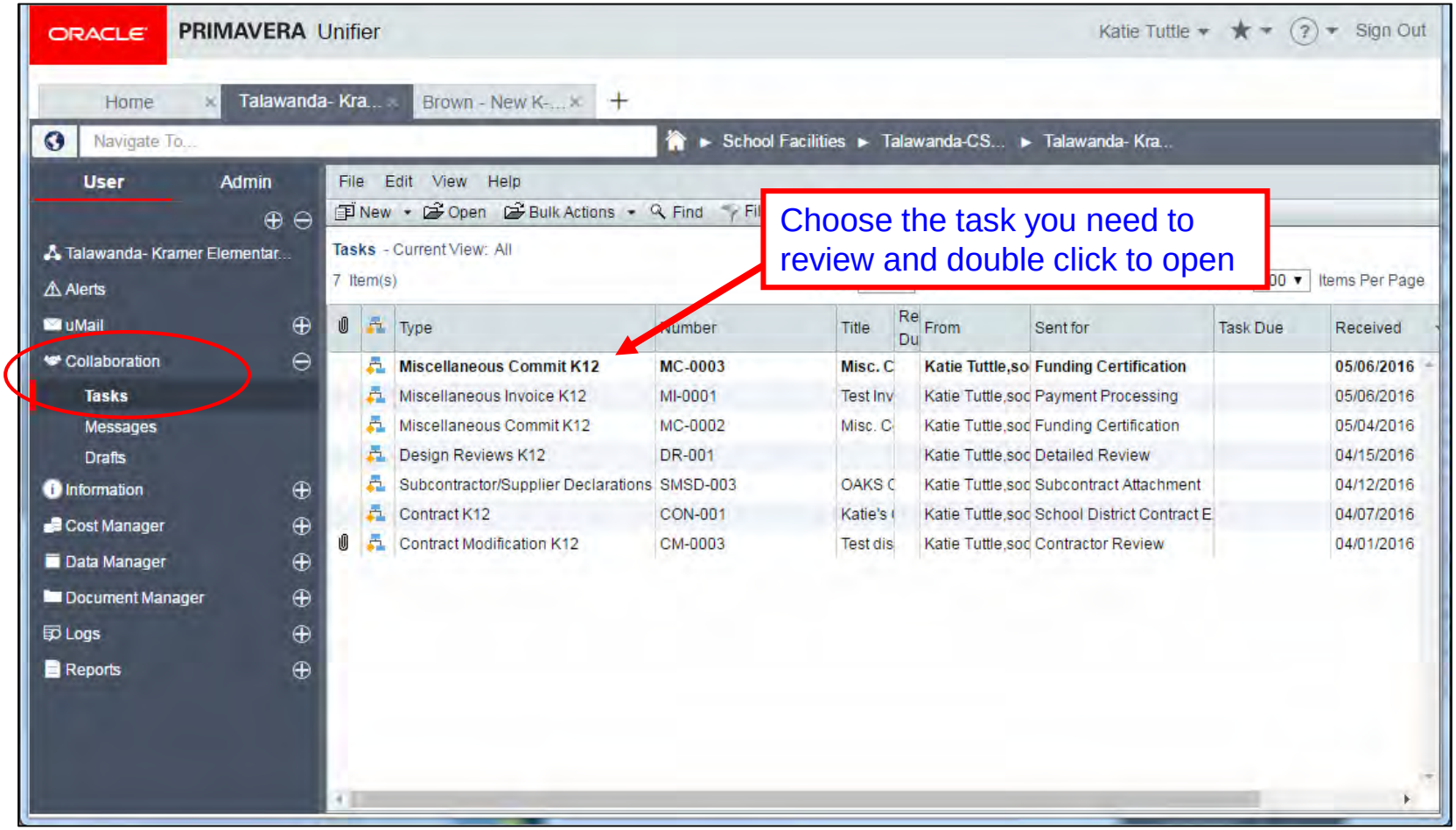
This record is now going to be Bob Smith's TASK.

Working with Tasks

Receive an Email



Reviewing a Task



Reviewing a Task

Applications for Payment K12 - Test - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=158732&parent_id=0&viewOnly=0&project_

File Edit View Actions Help

Accept Task | Decline Task | Line Item History | SOV | Close Window

Click Accept Task

Review any Task Notes

General

Applications for Payment K12

General

Project Name:	OAKS CI District Training Project 1	Record Number:	PR-0005
Project Number:	SFC-080001	Creator:	Kati
Organization Name:	OAKS CI District Training Project - 1	Creation Date:	02/16/2016 07:04 AM (UTC-5)
Facility Name:		Status:	Pending

Task Details

From: Katie Tuttle;
To: District Rep:Barbara Taylor; More..
Cc:
Sent For: **District Approval**

Task Due Date:
Task Status: Not Started

Task Notes (0)

Pay Request Details

Current View: All

Show Currency in: Transaction Currency

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

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	D Re
003	AE-BS-CA	Building 5	$115,000.00	$23,000.00	$34,500.00	0	0	50	

Find

Total Amount: $103,500.00

Attachments (2) | Linked Records (0) | General Comments | Linked Mail (0)

Responding to a Task

- Review the upper and lower forms of the record
- Enter any additional information as necessary

Applications for Payment K12 - Test - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=158732&model=uafpk&project_id=1084&in

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Applications for Payment K12

General

Project Name: OAKS CI District Training Project 1
Project Number: SFC-080001
Organization Name: OAKS CI District Training Project - 1
Record Number: PR-0005
Creator: Katie Tuttle
Creation Date: 02/16/2016 07:04 AM (UTC-8)

Action Details

Approve (Click here to view latest content

To... Barbara Taylor,Katie Tuttle,Moenique Morris,R

Task Notes:

Cc...

Send For: Payment Pro

Note: Click to add a general comment that will be permanent to the record

Pay Request Details

Current View: All

Show Currency in: Transaction Currency

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

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	Re
003	AE-BS-CA	Building 5	$115,000.00	$23,000.00	$34,500.00	0	0	50	

Add Copy Import Remove Find

Total Amount: $103,500.00

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

Responding to a Task

Applications for Payment K12 - Test - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/ 158732&model=uafpk&project_id=1084&in

File Edit View Actions Help

Send Save Spelling.. Add Attachment

Select Appropriate Workflow Action

Workflow Actions Approve

-Select-
Approve
Return for Clarification

General

Click Send

Project Name: OAKS CI District Training Project 1

Project Number: SFC-080001

Organization Name: OAKS CI District Training Project - 1

Record Number: PR-0005

Creator: Katie Tuttle

Creation Date: 02/16/2016 07:04 AM (UTC-8)

Action Details

Approve (Click here to view latest content

To... Barbara Taylor,Katie Tuttle,Moenique Morris,R

Cc...

Send For: Payment Processing

Note: When Workflow action is selected the Action Details (To: box) updates with the next person in the workflow

Pay Request Details

Current View: All

Show Currency in: Transaction Currency

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

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	Re
003	AE-BS-CA	Building 5	$115,000.00	$23,000.00	$34,500.00	0	0	50	

Add Copy Import Remove Find

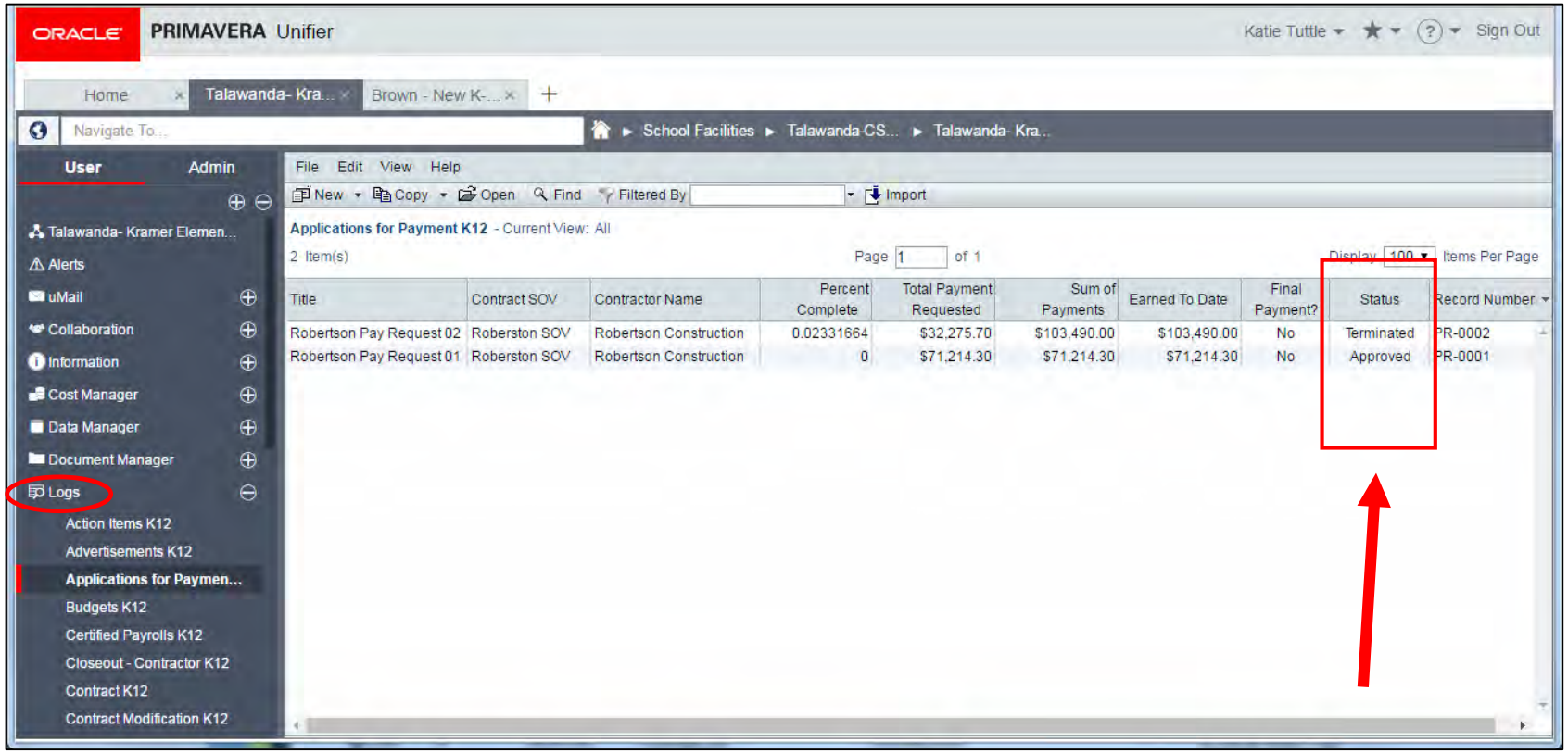
Total Amount: $103,500.00

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

What if I want to know the status of my Record?

Finding the Record Status

- Navigate to Logs, choose Record type, view Status column
- For more detail, double-click the record to open



Finding the Record Status

- Review Task Details
- Click Workflow Progress link to view status of the record

Applications for Payment K12 - Test PR 5 - Project No. OCI-150041.03 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=153976&parent_id=0&viewOnly=0&project

File Edit View Actions Help

Accept Task | Decline Task | Line Item History | SOV | Close Window

Applications for Payment K12

General

General

Project Name: Brown - New K-12 Second Chance
Project Number: OCI-150041.03
Organization Name: Brown LSD
Facility Name: Brown– New K-12

Record Number: PR-0008
Creator: Katie Tuttle
Creation Date: 06/24/2016 05:44 AM (UTC-8)
Status: Approved

Task Details

From: Katie Tuttle;
To: District Treasurer;Barbara Taylor; More..
Cc:
Sent For: **Payment Processing**

Task Due Date:
Task Status: Not Started

Task Notes (8)
Workflow Progress

Pay Request Details

Current View: All

Show Currency in: Transaction Currency

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

No.	WBS Code	Commit Short Description	Scheduled Value	Previously Earned	Earned This Period	% Labor Complete	% Materials Complete	% Services Complete	D Re
001	CE-CE-GC	General Conditions Costs	$33,181.00	$24,885.75	$8,295.25	100	0	0	

Find

Total Amount: $8,295.25

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

Finding the Record Status

Workflow Progress - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/studio/workflow/show/progress?processId=7796&selected_node_ic

Workflow Progress

Title: **Test PR 5** Record No.: **PR-0008** BP Setup used: **Contractor Pay Re...**

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Katie Tuttle	State of Ohio	Completed	Submit	06/24/2016 05:44 AM (UTC-8)
AE Review	Katie Tuttle	State of Ohio	Completed	Accept	06/24/2016 05:45 AM (UTC-8)
Update					
OA Review	Katie Tuttle	State of Ohio	Completed	Recommend Approv	06/24/2016 05:45 AM (UTC-8)
Review and Validation	Katie Tuttle	State of Ohio	Completed	Validated	06/24/2016 05:45 AM (UTC-8)
PM Review	Katie Tuttle	State of Ohio	Completed	Accept	06/24/2016 05:46 AM (UTC-8)
PM Supervisor Review					
District Approval	Katie Tuttle	State of Ohio	Completed	Approve	06/24/2016 05:56 AM (UTC-8)
Payment Processing	Supriya Gali	State of Ohio	Not Started		
Payment Processing	Lindsay Deering	State of Ohio	Not Started		
Payment Processing	Barbara Taylor	State of Ohio	Not Started		
Payment Processing	Shiva Gannerla	State of Ohio	Not Started		
Payment Processing	Purna Irukulapati	State of Ohio	Not Started		

View the workflow of the Record from Creation to End

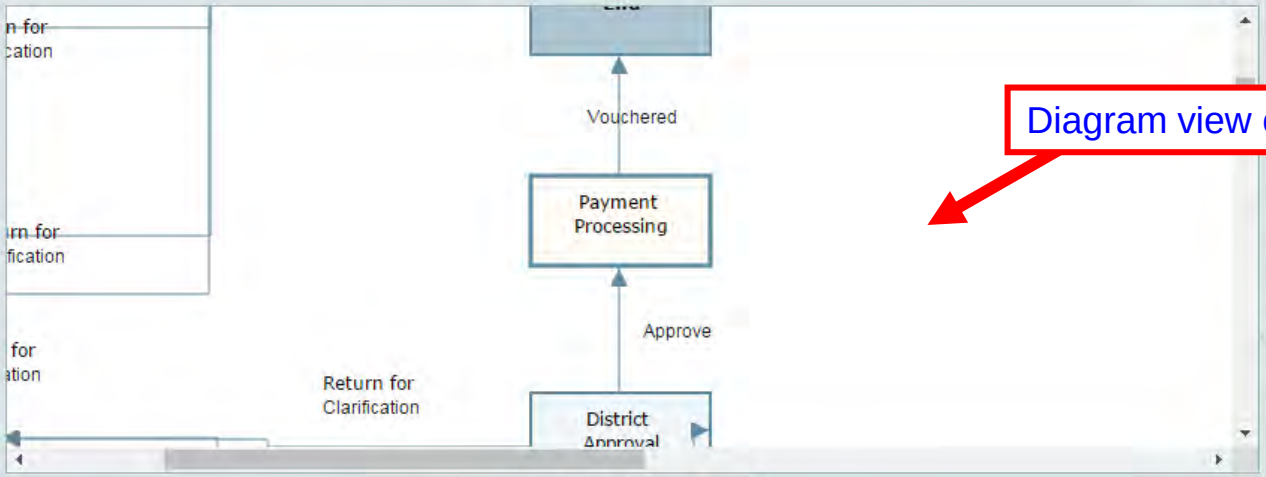
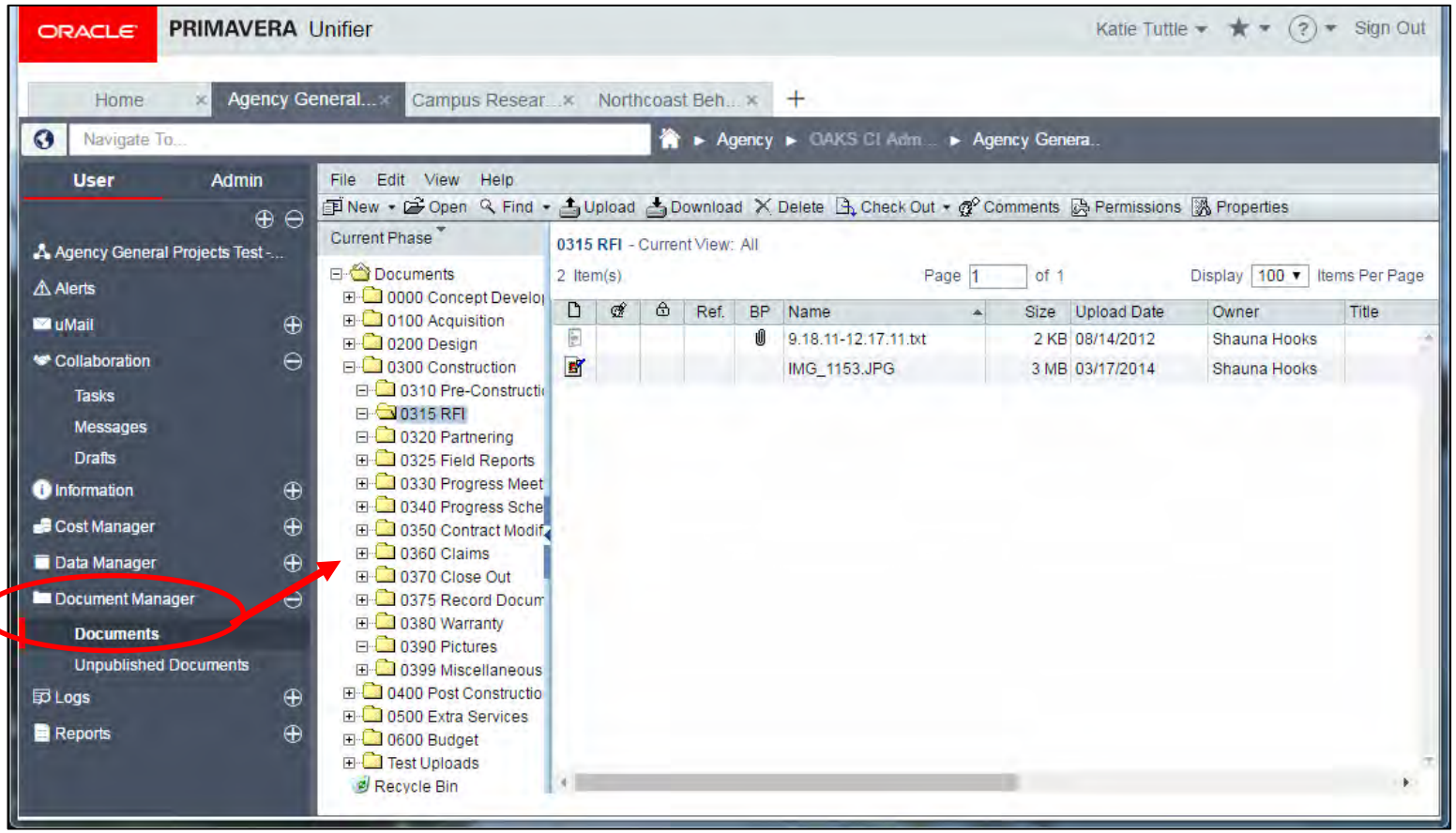


Diagram view of the workflow

Print Graphic Close

About Document Manager

- Document manager houses all supporting documentation
- The utilization of Document Manager will differ based on your particular project
- For more information on uploading and attaching documents, please refer to the Document Manager Job Aids on our website: ofcc.ohio.gov



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211