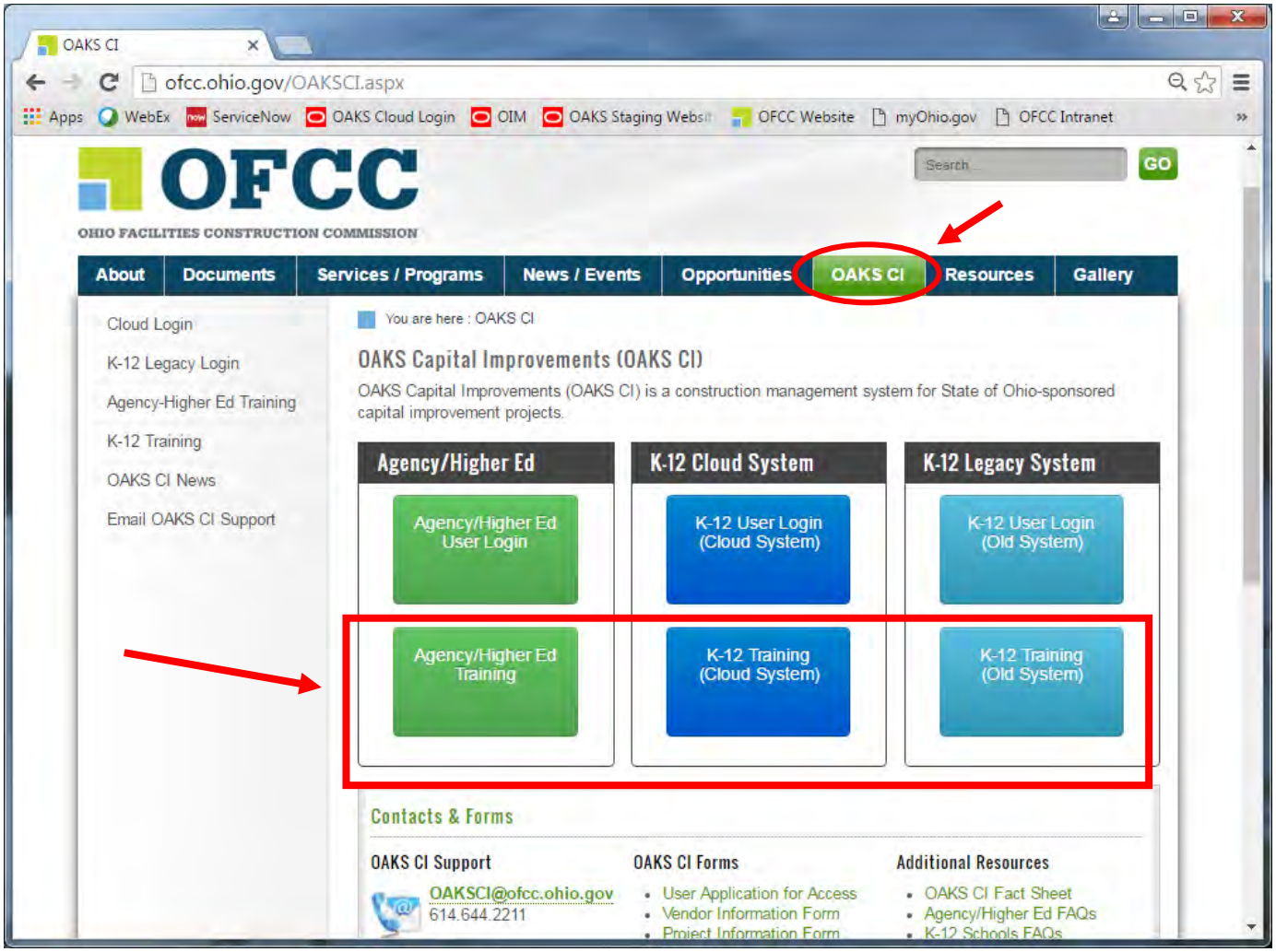
OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

# K-12 Intro to OAKS CI, Legacy

# Job Aids

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



# What does OAKS CI do for you?

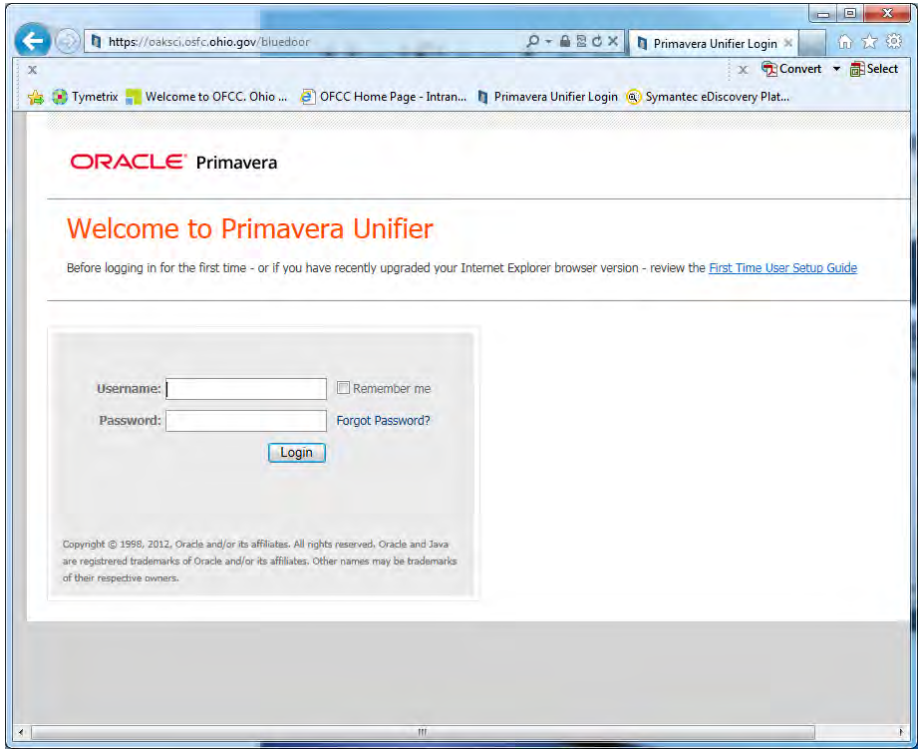
- Tracks your project progress
- Automates workflows (based on Ohio Facilities Construction Commission forms and procedures)
- Allows for improved project communication and collaboration
- Housed in the Cloud so you can utilize any browsing tool to access
- Now includes DocuSign which minimizes time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

# Navigating OAKS CI

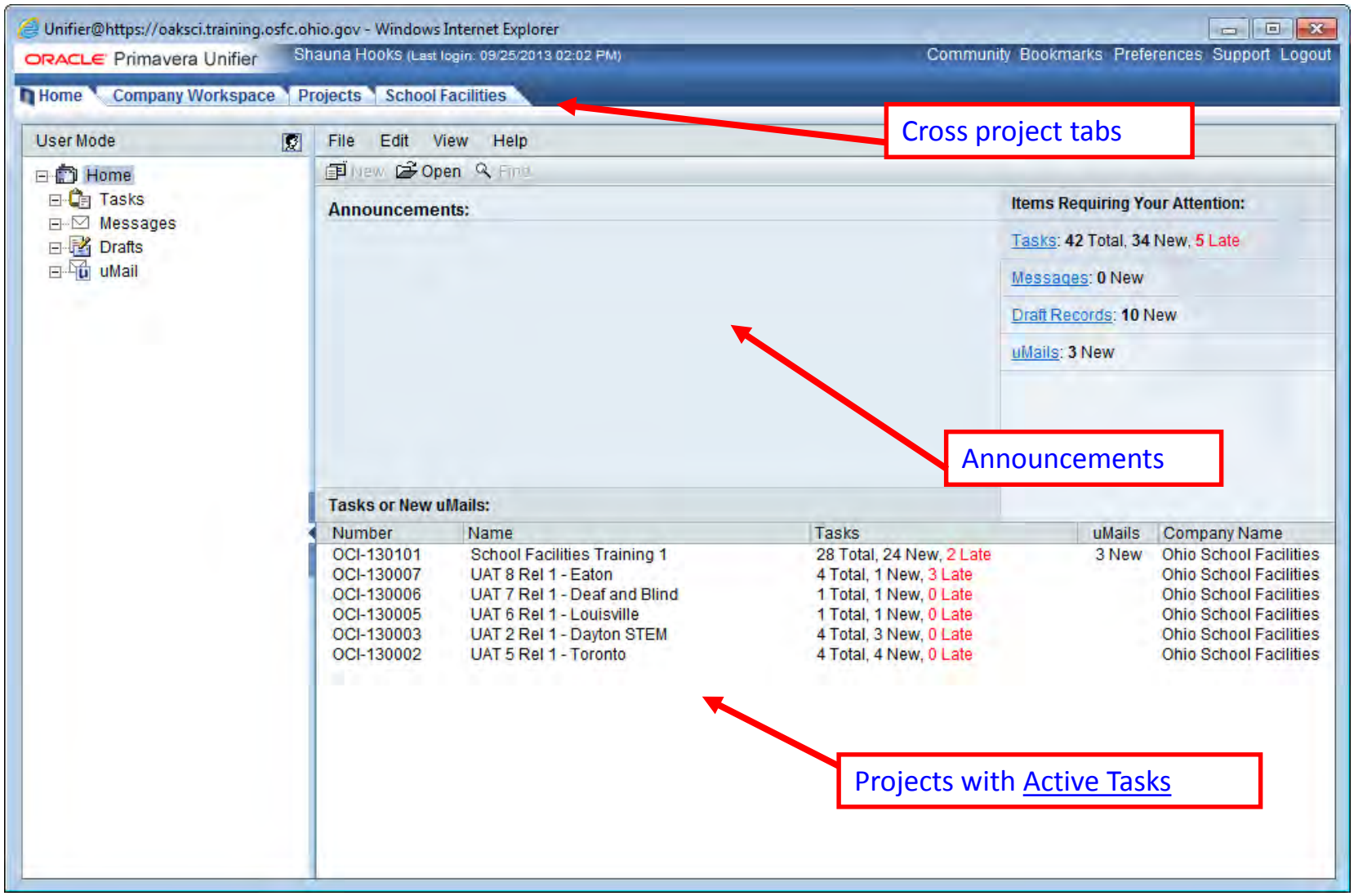
# Navigate to OAKS CI

- Open Internet Explorer **(Must use Version 9 or earlier)**
- Navigate to: https://oaksci.osfc.ohio.gov
- Enter your assigned Username and Password
- Click “Login”

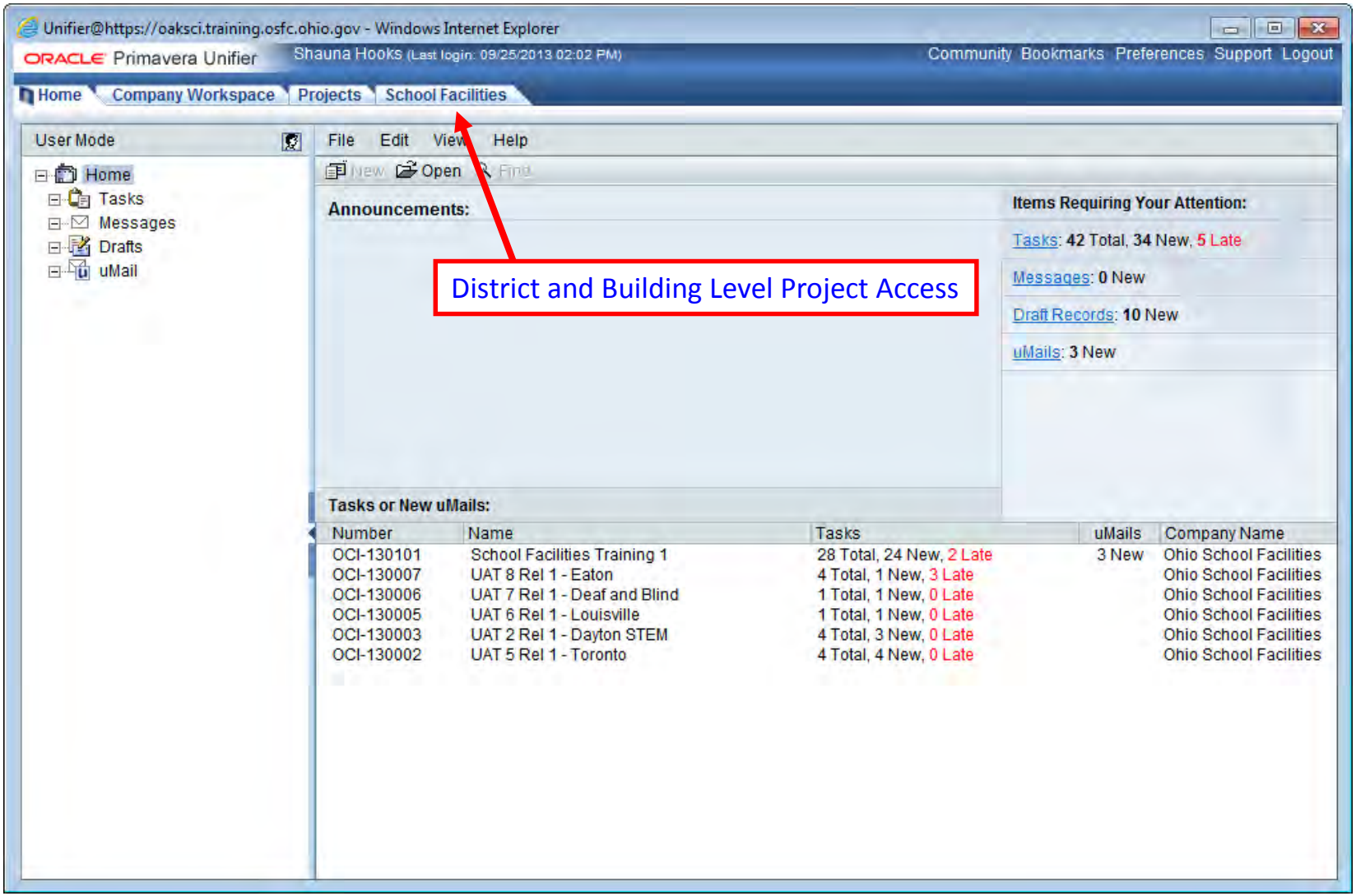
Note: Please ensure that your pop-up blocker is disabled for this site



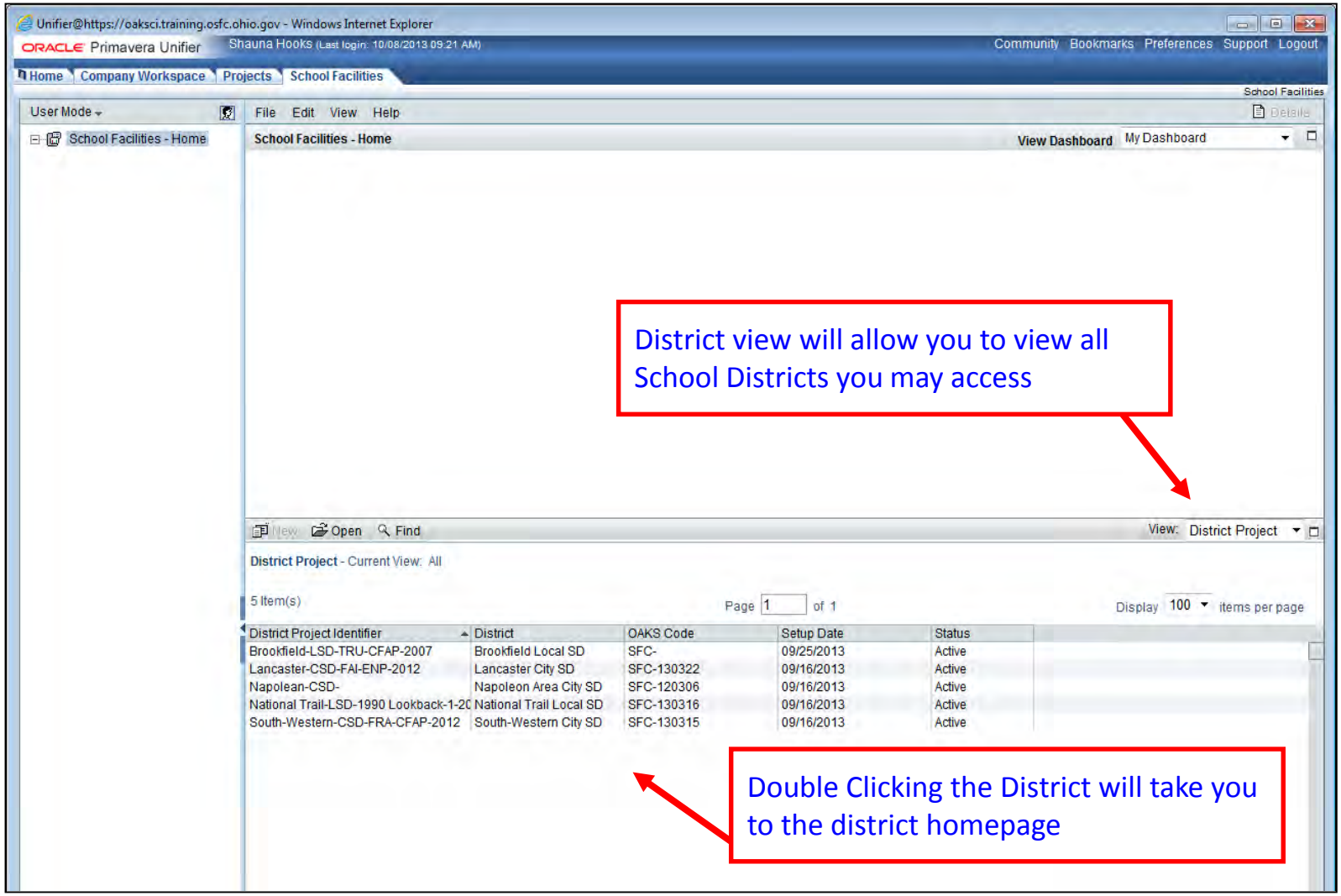
# Cross Project Home Page



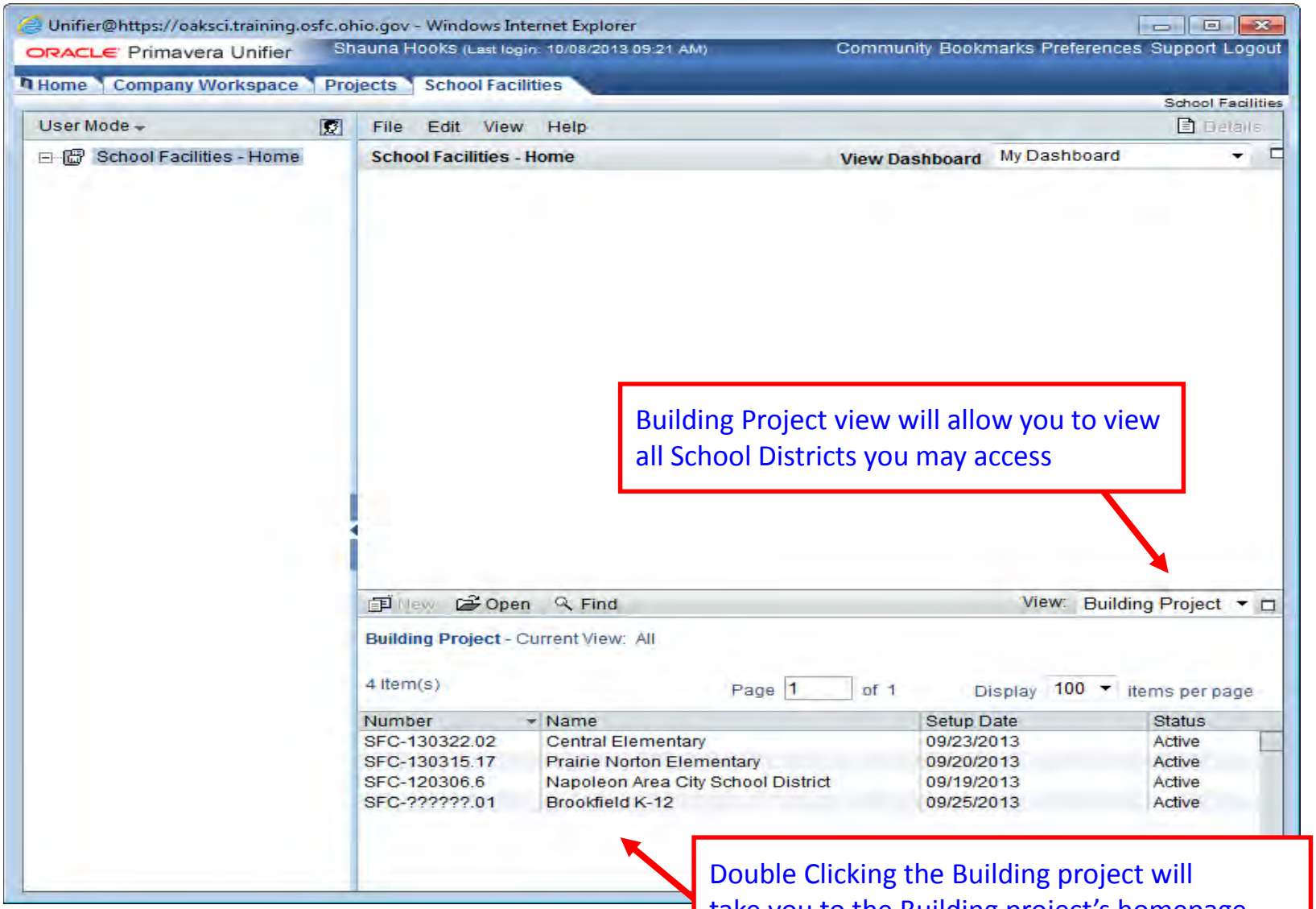
# District and Building Level Access



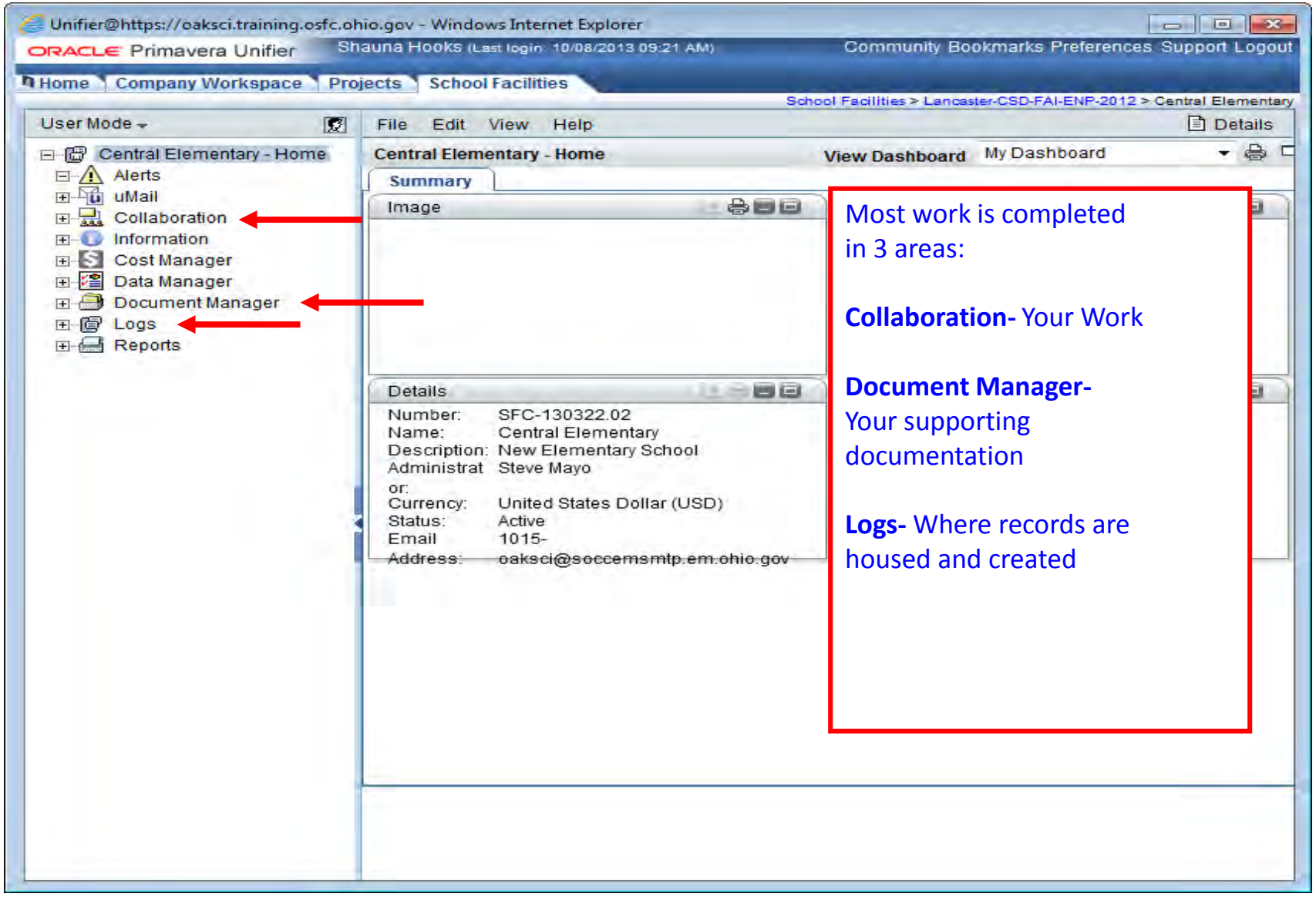
# District Level Access



# Building Level Access



# Building Project Home Page



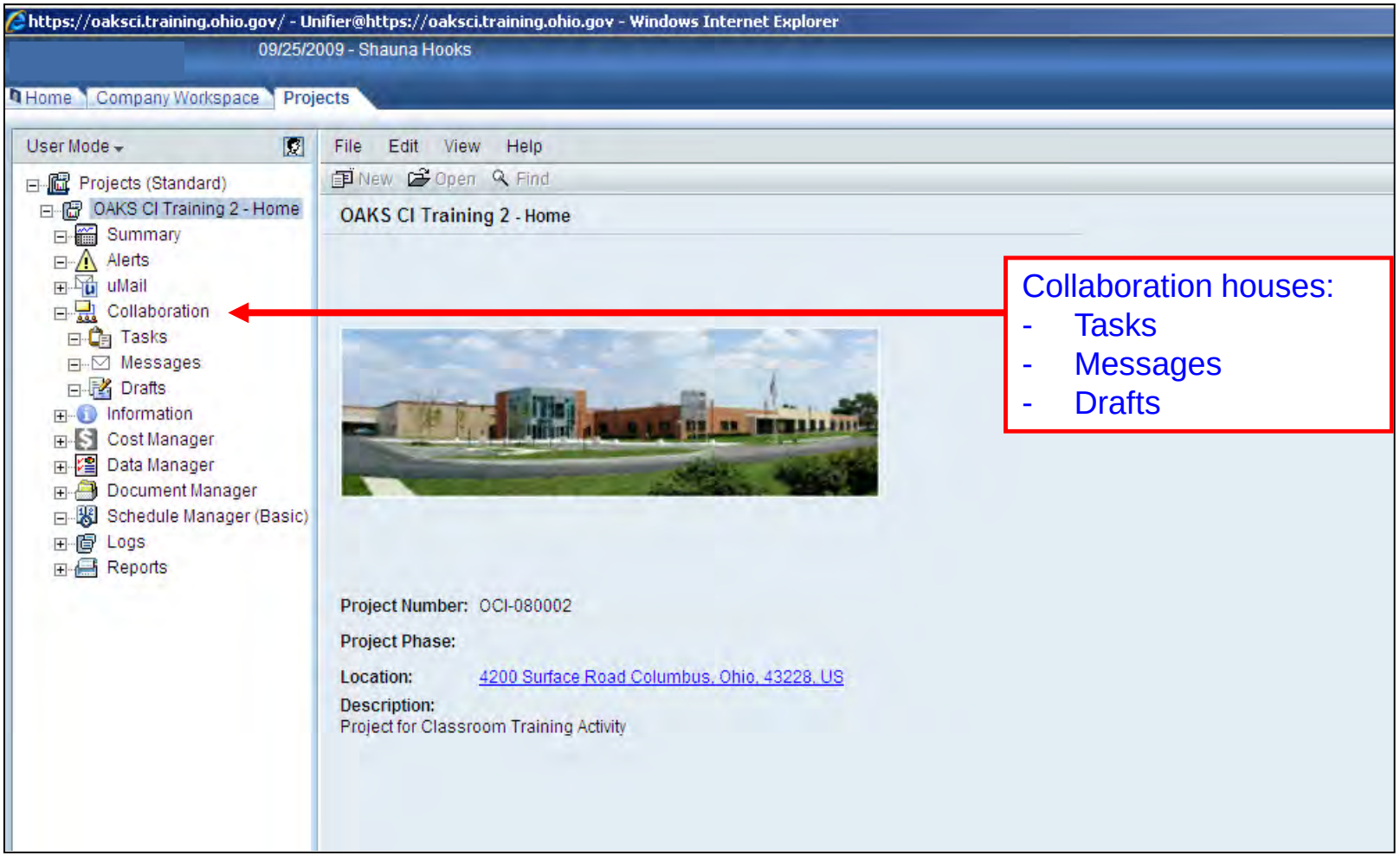

Most work is completed in 3 areas:

**Collaboration-** Your Work

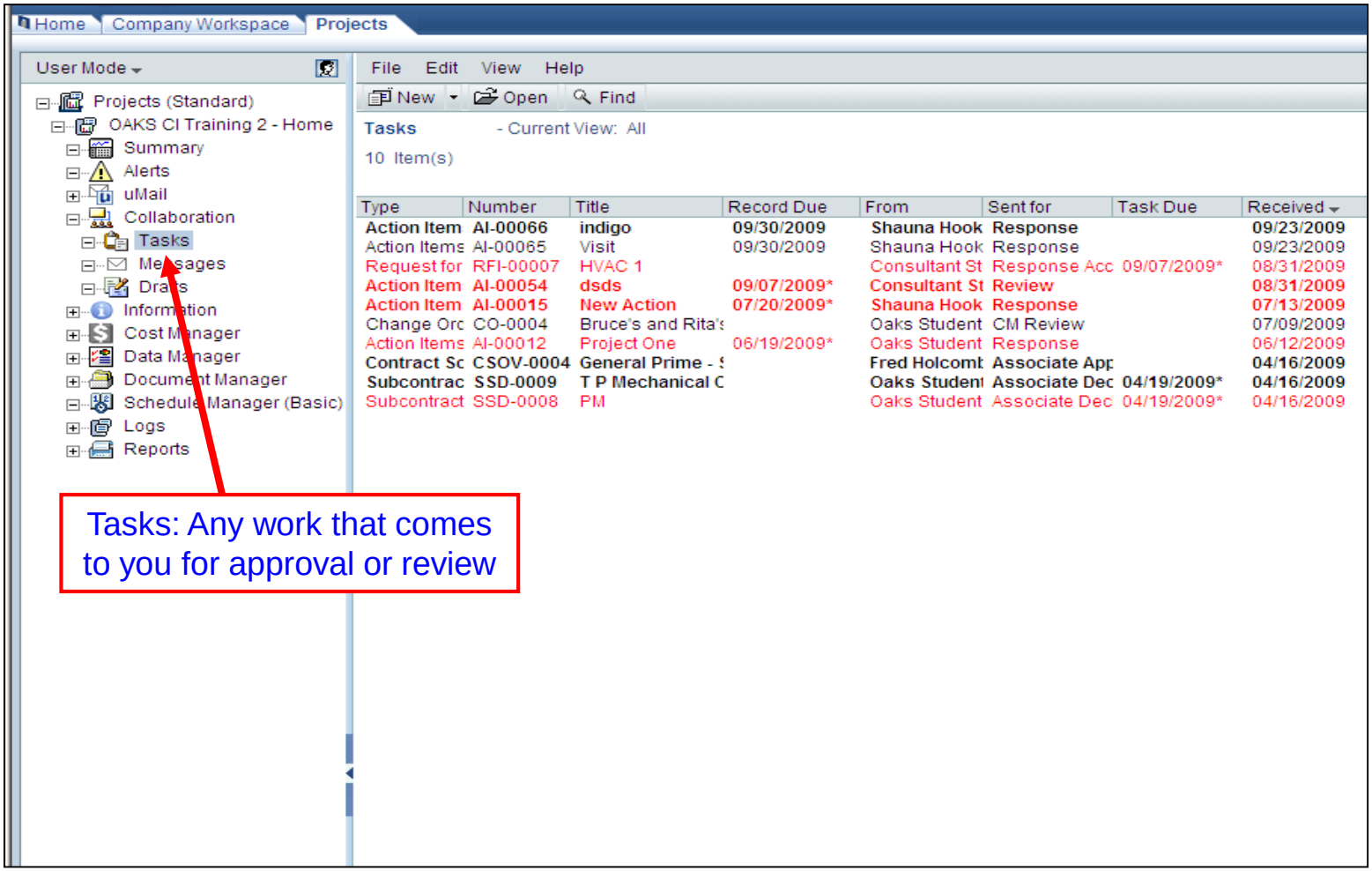
**Document Manager-** Your supporting documentation

**Logs-** Where records are housed and created

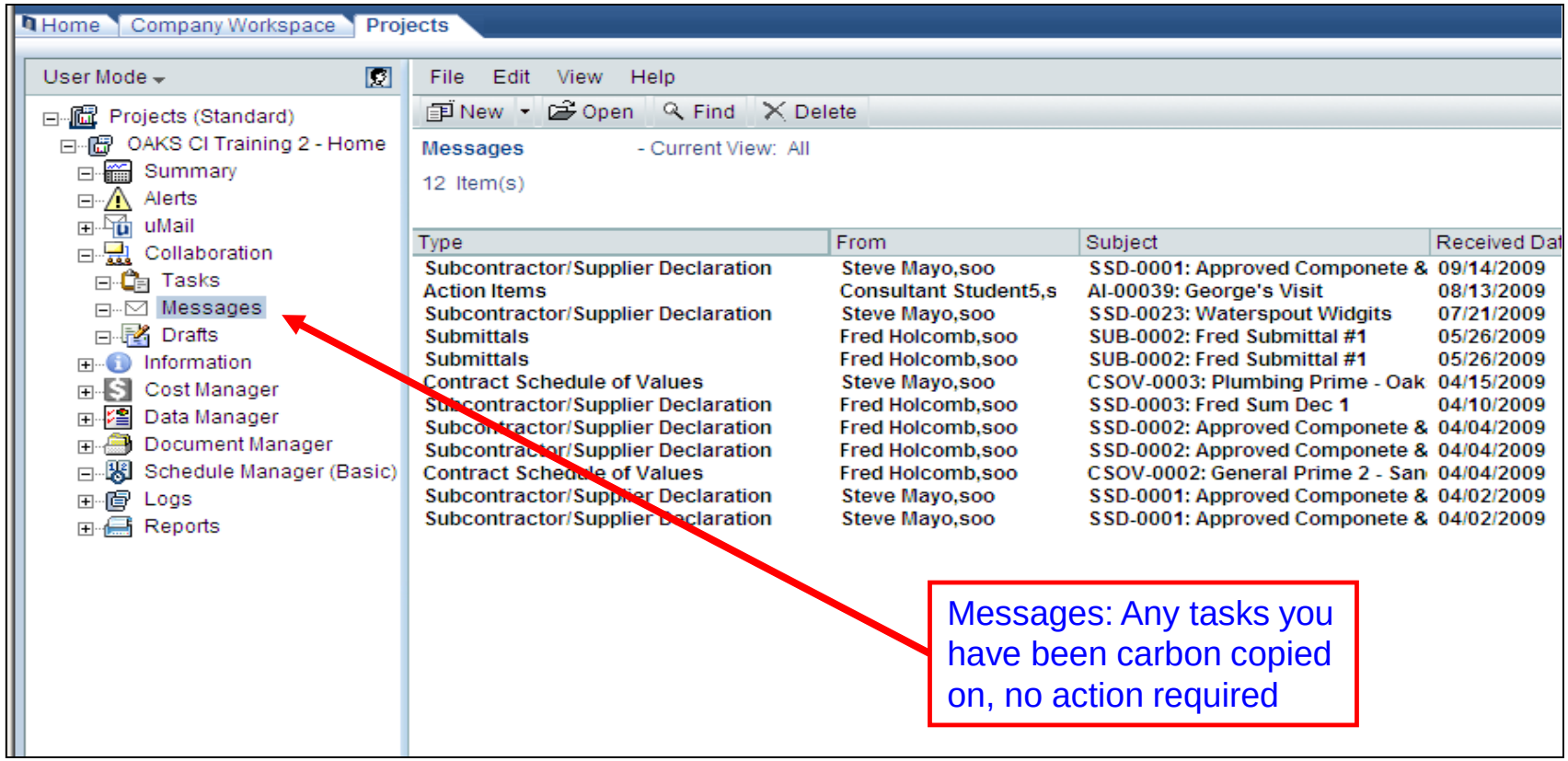
# Collaboration– All About You!



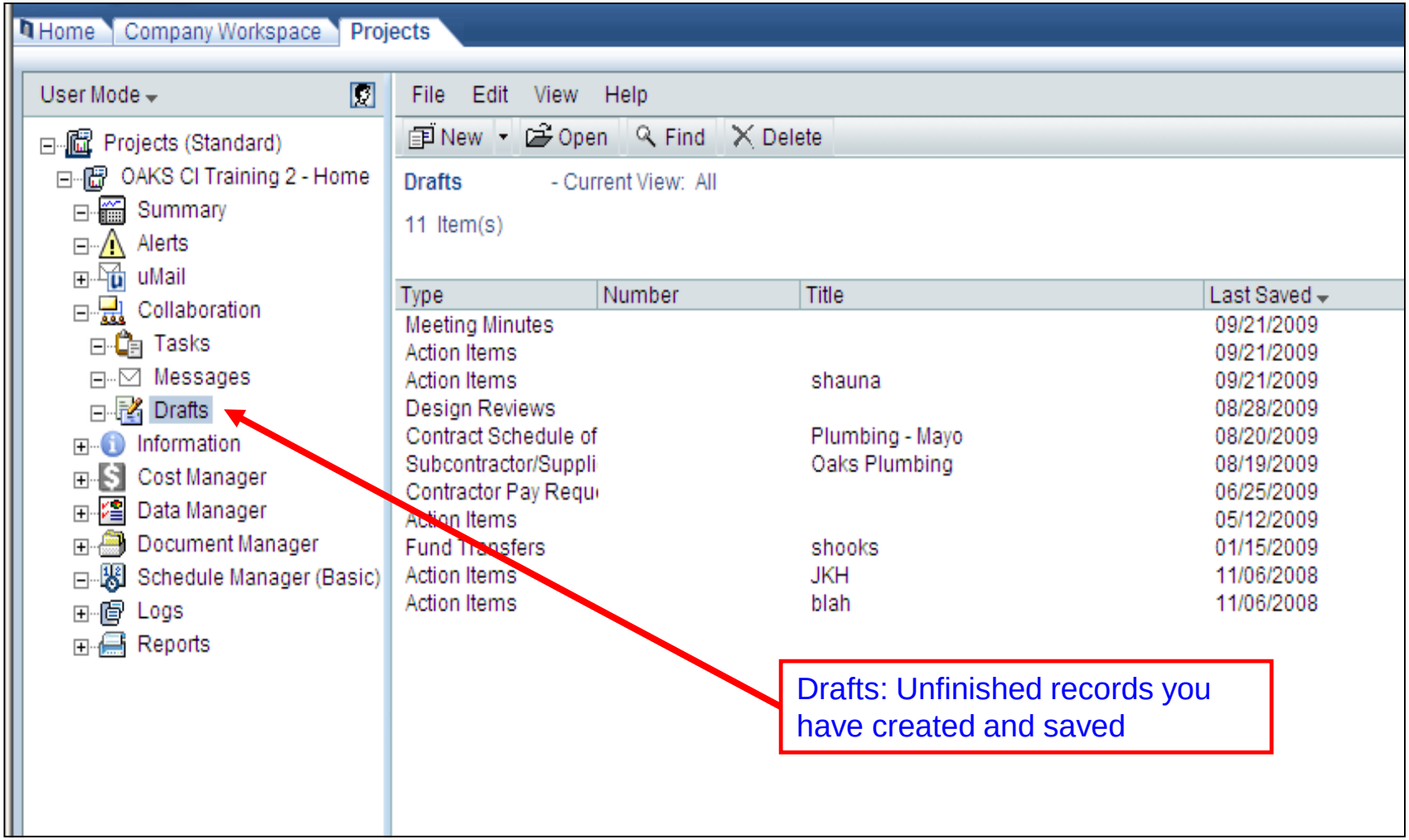
# Tasks (Your Records)



# Messages


Home
Company Workspace
Projects
User Mode
Projects (Standard)
OAKS CI Training 2 - Home
Summary
Alerts
uMail
Collaboration
Tasks
Messages
Drafts
Information
Cost Manager
Data Manager
Document Manager
Schedule Manager (Basic)
Logs
Reports
File Edit View Help
New Open Find Delete
Messages - Current View: All
12 Item(s)
Type | From | Subject | Received Dat
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

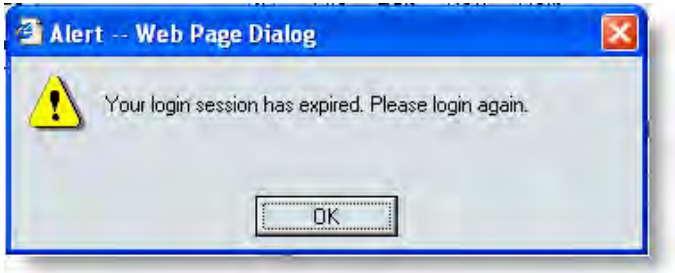
# Drafts


Home
Company Workspace
Projects
User Mode
File Edit View Help
New Open Find Delete
Projects (Standard)
OAKS CI Training 2 - Home
Summary
Alerts
uMail
Collaboration
Tasks
Messages
Drafts
Information
Cost Manager
Data Manager
Document Manager
Schedule Manager (Basic)
Logs
Reports
Drafts - Current View: All
11 Item(s)
Type | Number | Title | Last Saved
Meeting Minutes | | | 09/21/2009
Action Items | | | 09/21/2009
Action Items | | shauna | 09/21/2009
Design Reviews | | | 08/28/2009
Contract Schedule of | | Plumbing - Mayo | 08/20/2009
Subcontractor/Suppli | | Oaks Plumbing | 08/19/2009
Contractor Pay Requ | | | 06/25/2009
Action Items | | | 05/12/2009
Fund Transfers | | shooks | 01/15/2009
Action Items | | JKH | 11/06/2008
Action Items | | blah | 11/06/2008
Drafts: Unfinished records you have created and saved

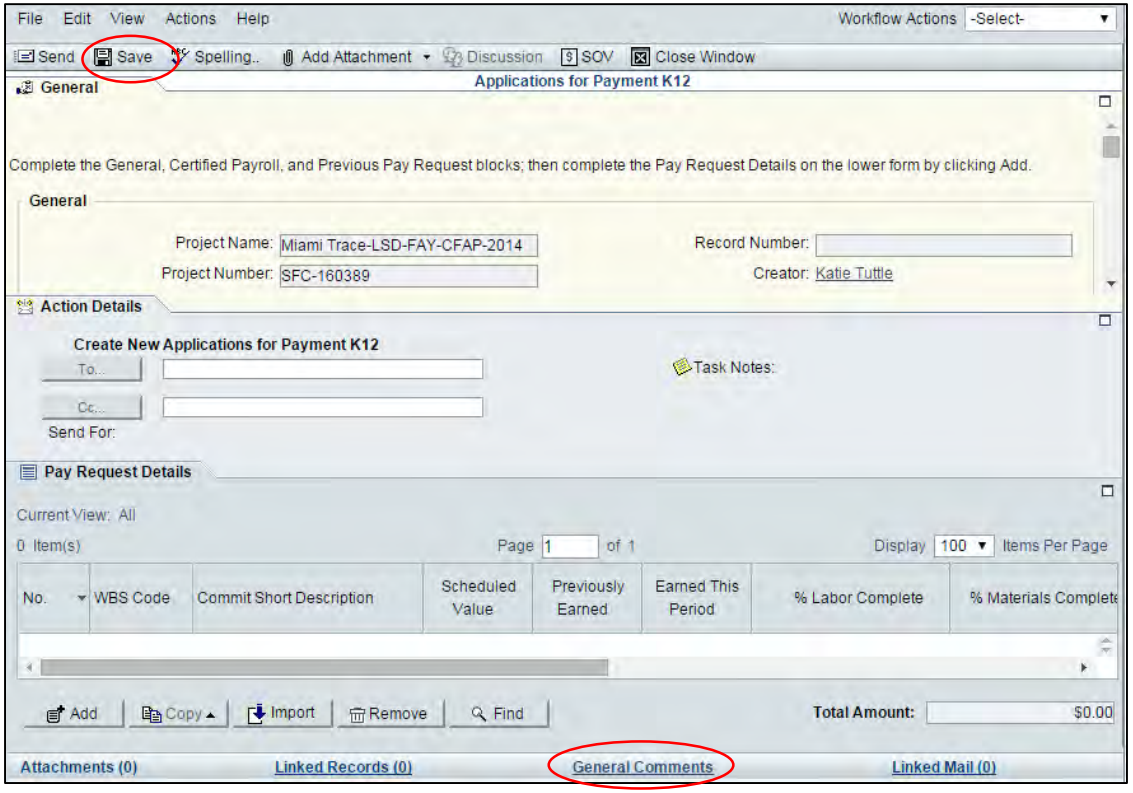
# Drafts and Timeout

## 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

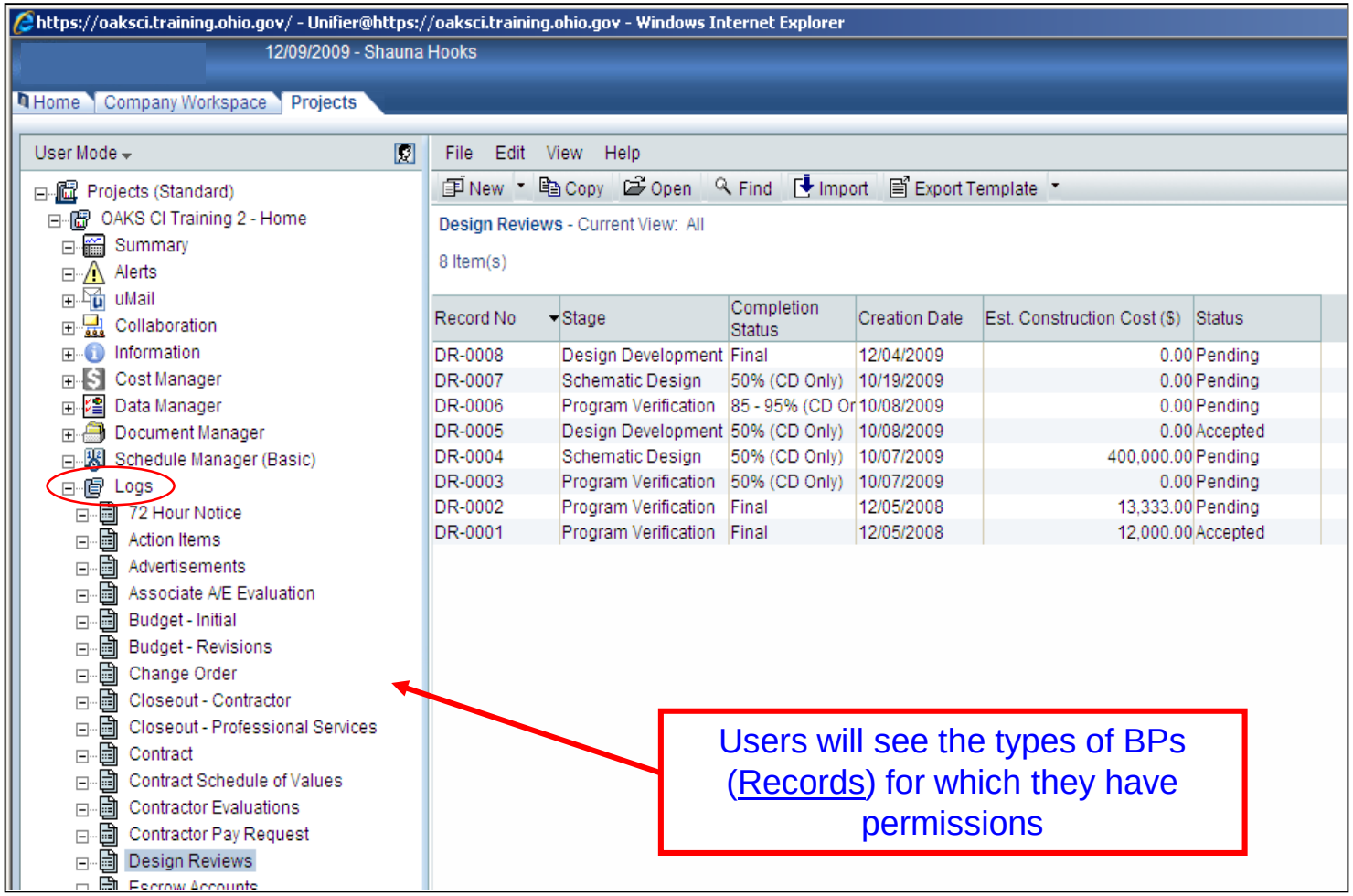



Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you’re typing extensive notes, first type them in a Word doc then copy and paste into General Comments

# Logs

## Logs house Business Processes or “BPs” (Records)

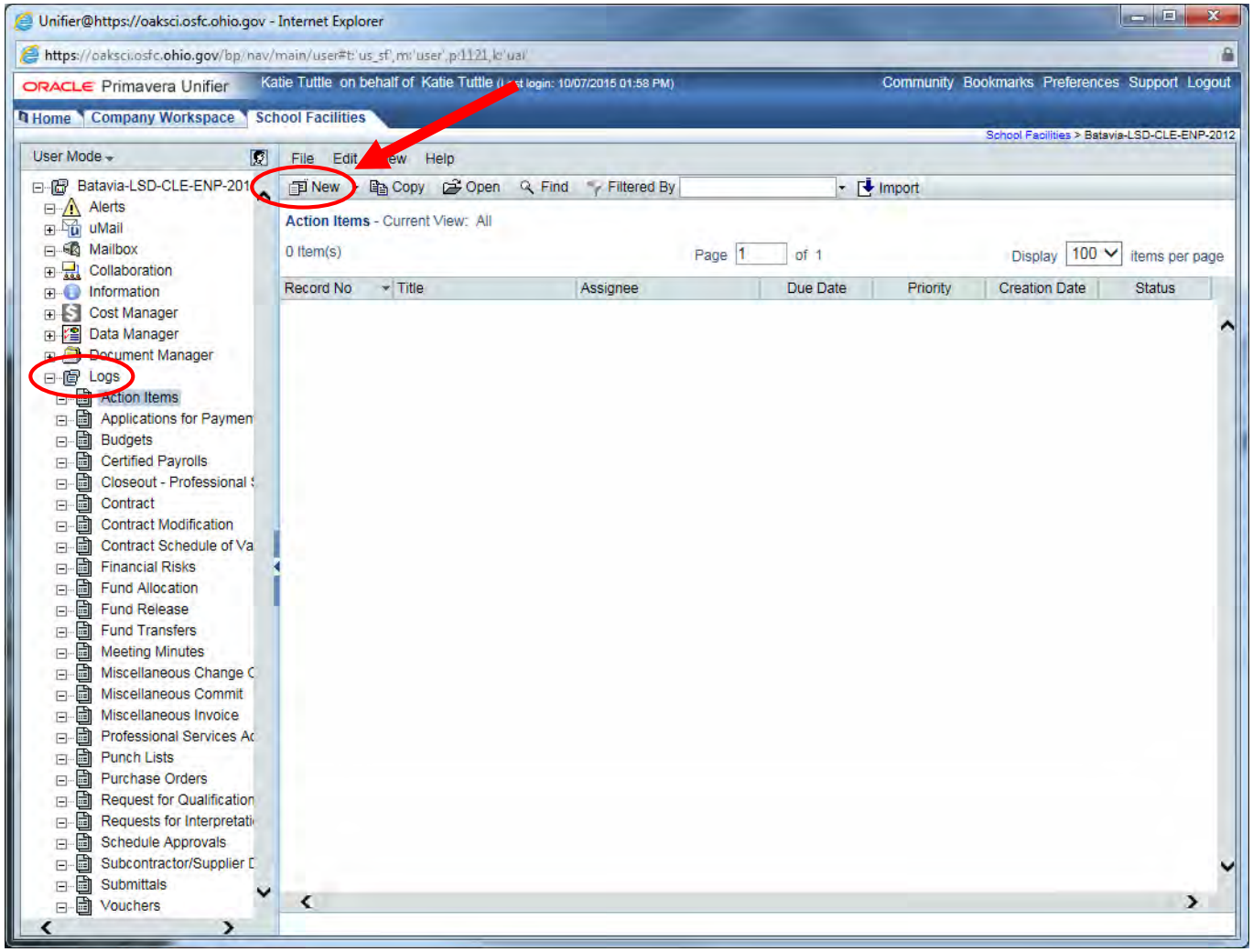
- A BP is any Record that has been created (i.e. Pay Requests, Submittals, etc.) and submitted through a workflow for review or approval.



# How do Records Work?

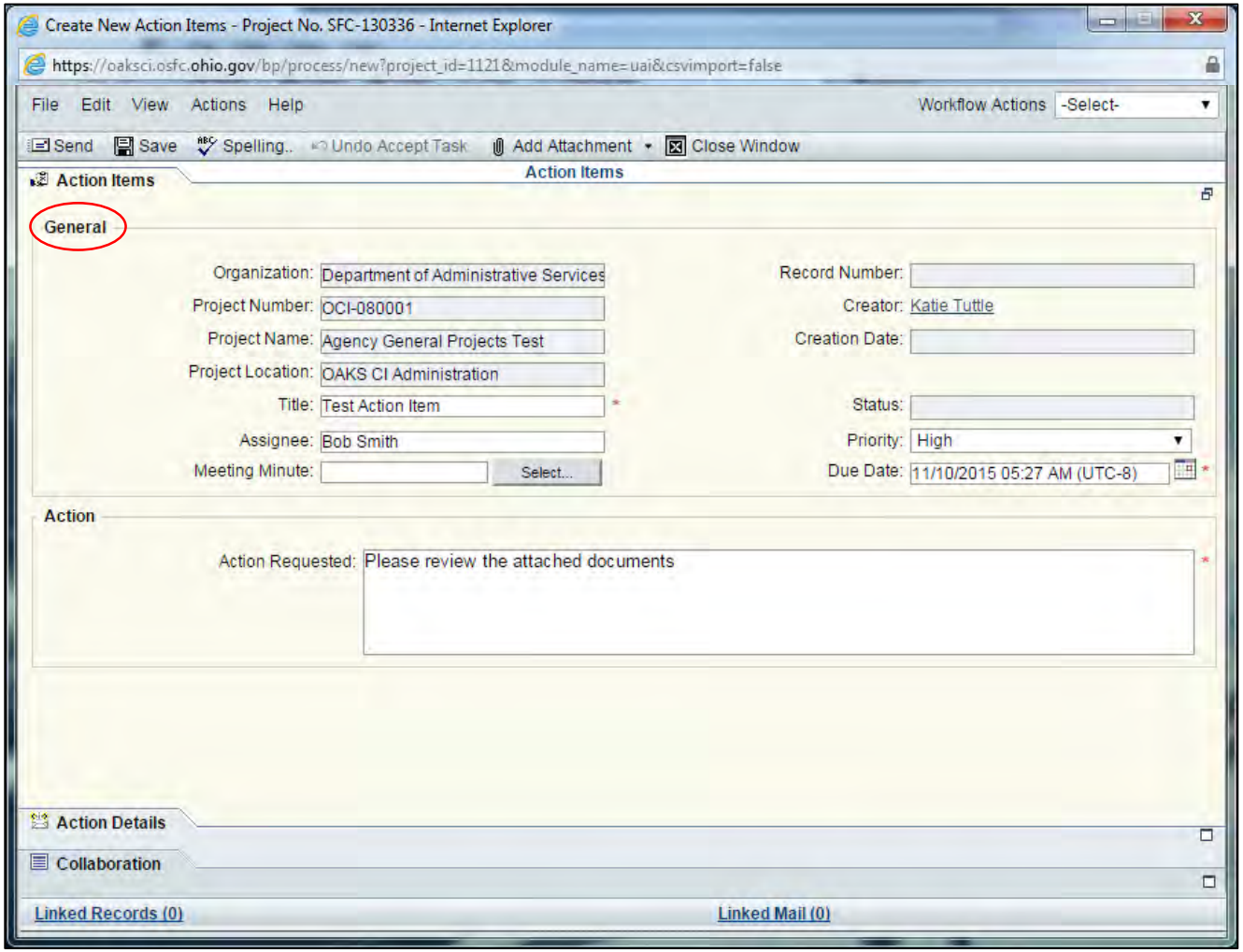
# Create a Record

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



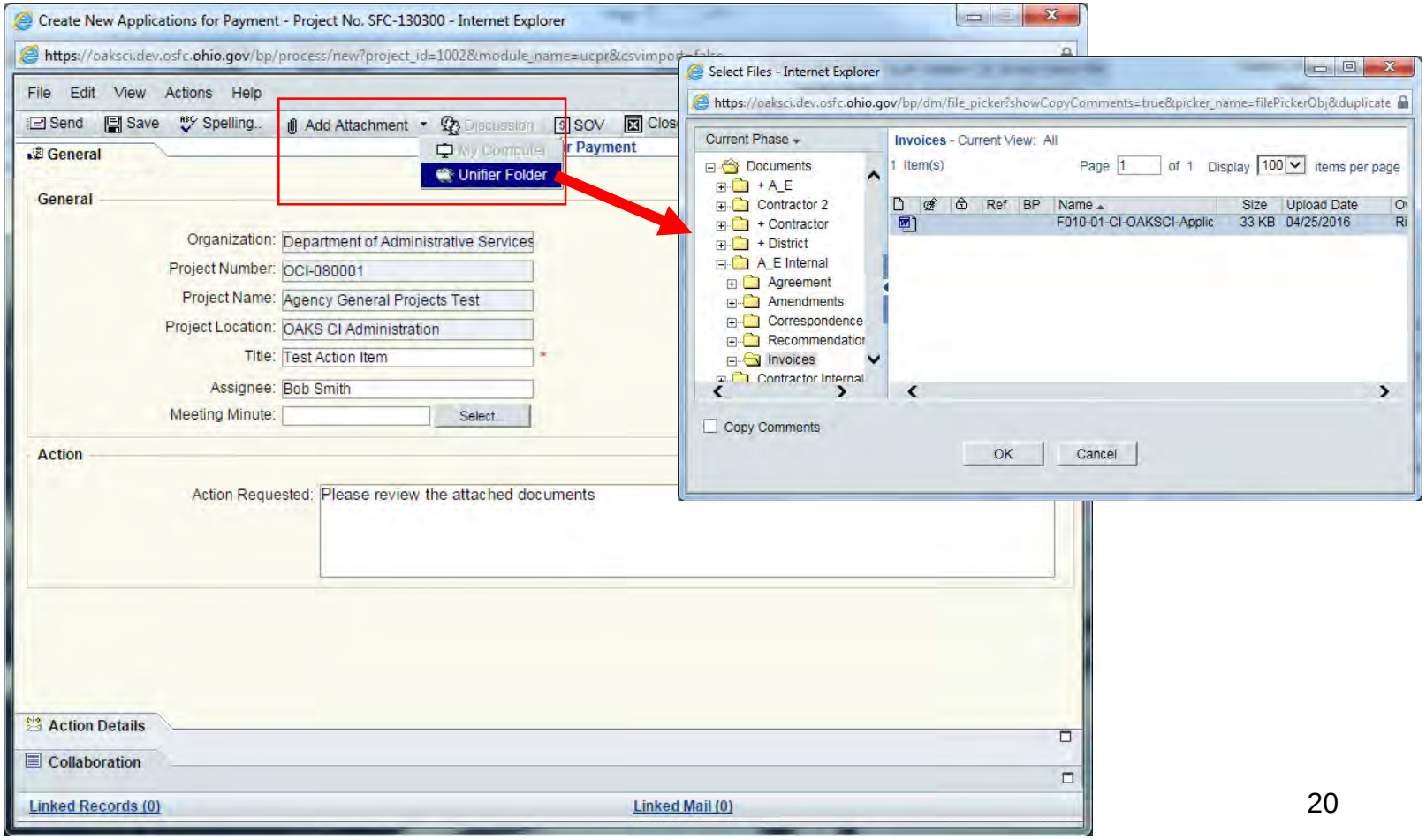
# Add Information

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



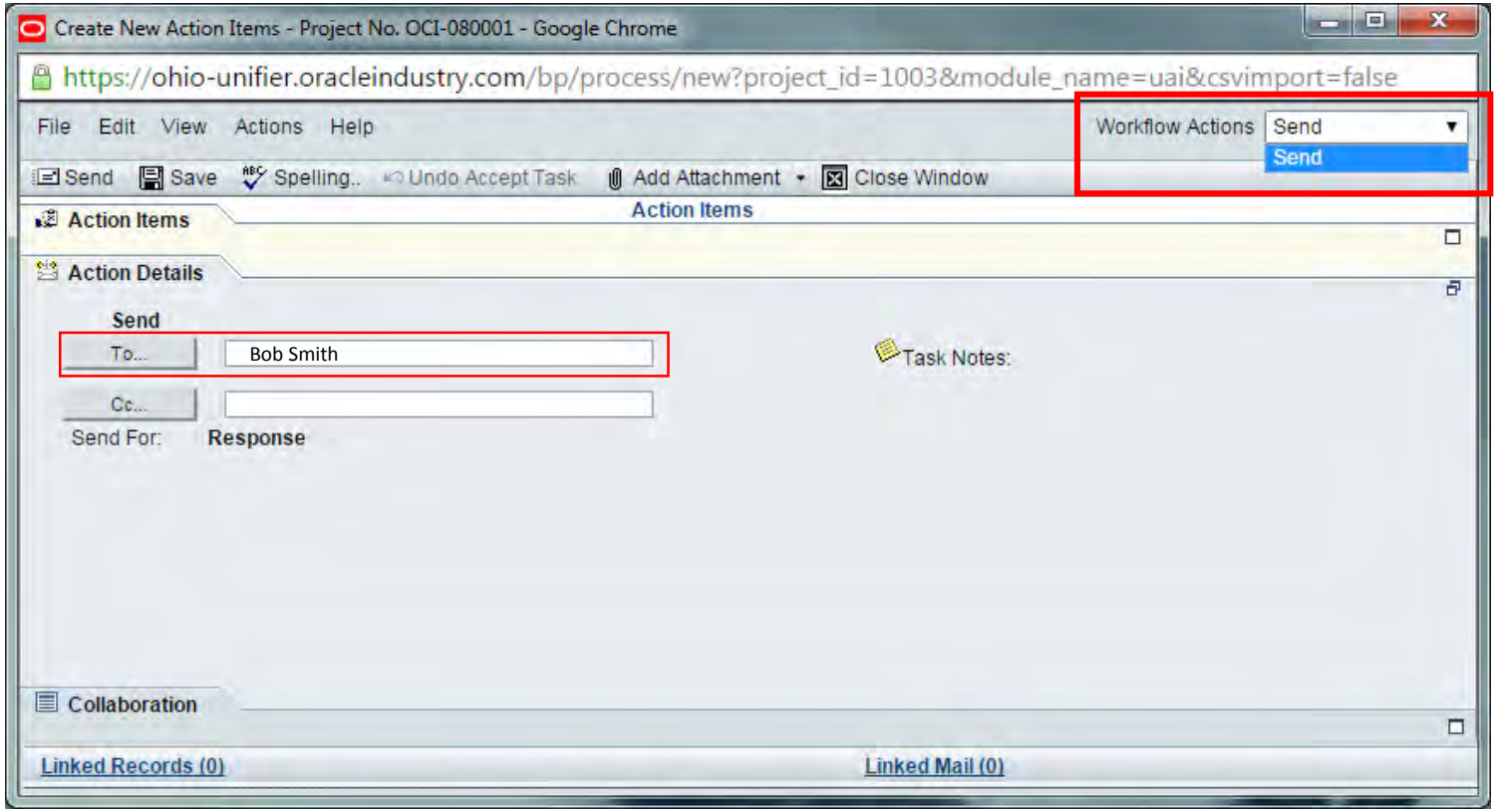
# Add Attachments

- **Note:** Documents must first be uploaded to Document Manager
- To add any additional documentation
  - Click Add Attachment
  - Choose Unifier Folder and locate your documents
  - Click Open then Click OK



# Send the Record

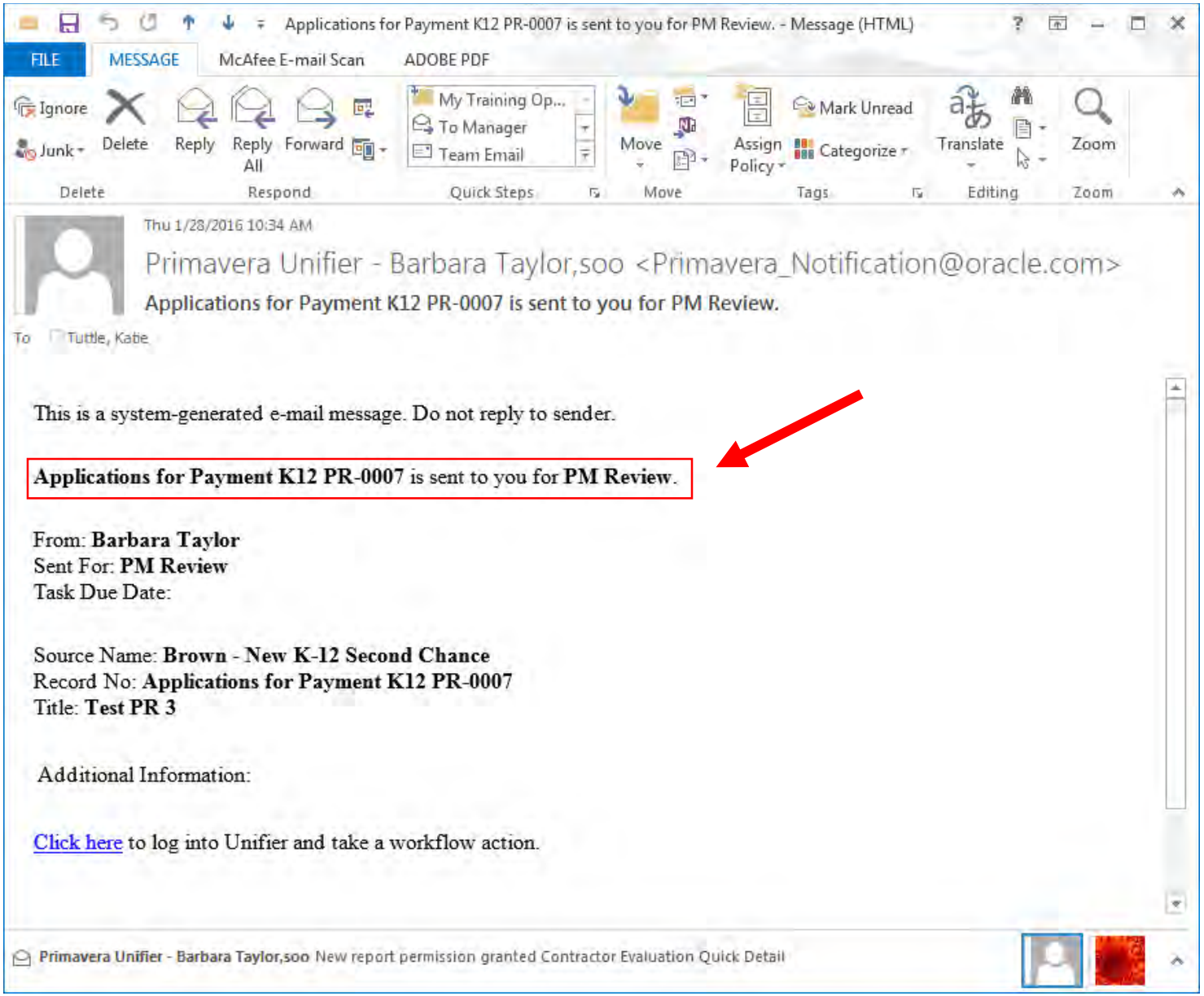
- Choose a Workflow Action
- Click Send



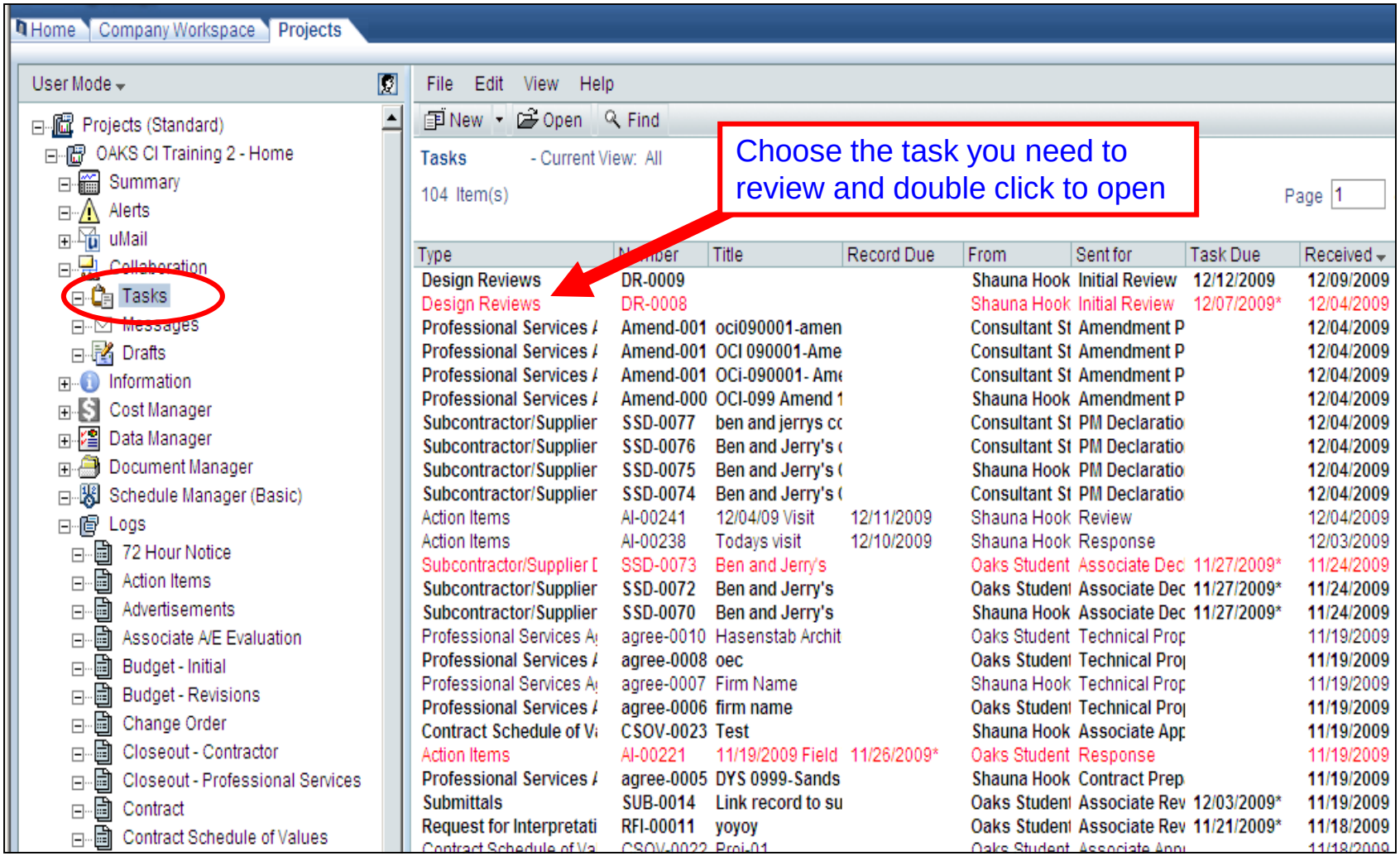

**This record is now going to be Bob Smith's TASK.**

# Working with Tasks

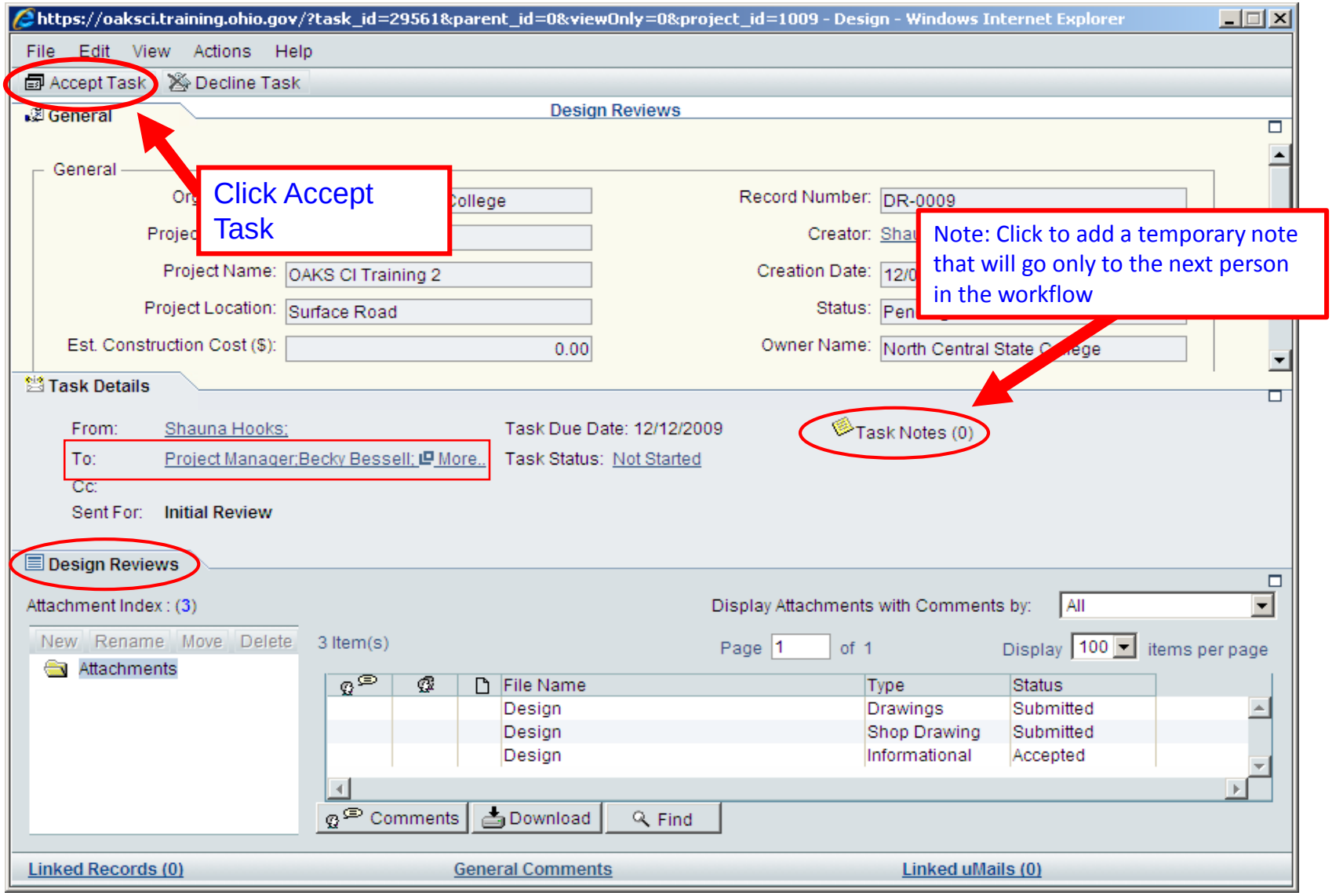
# Receive an Email



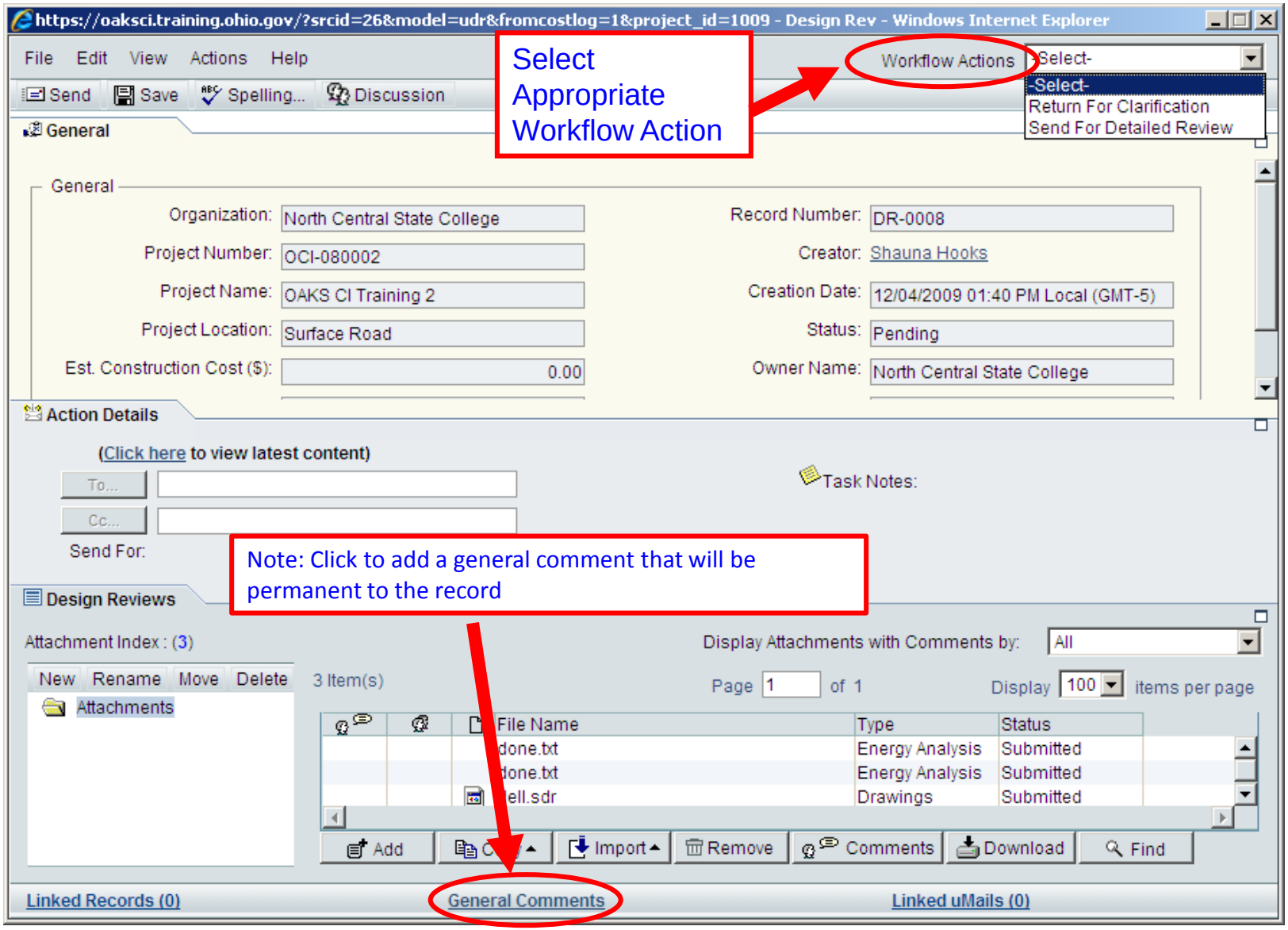
# Reviewing a Task



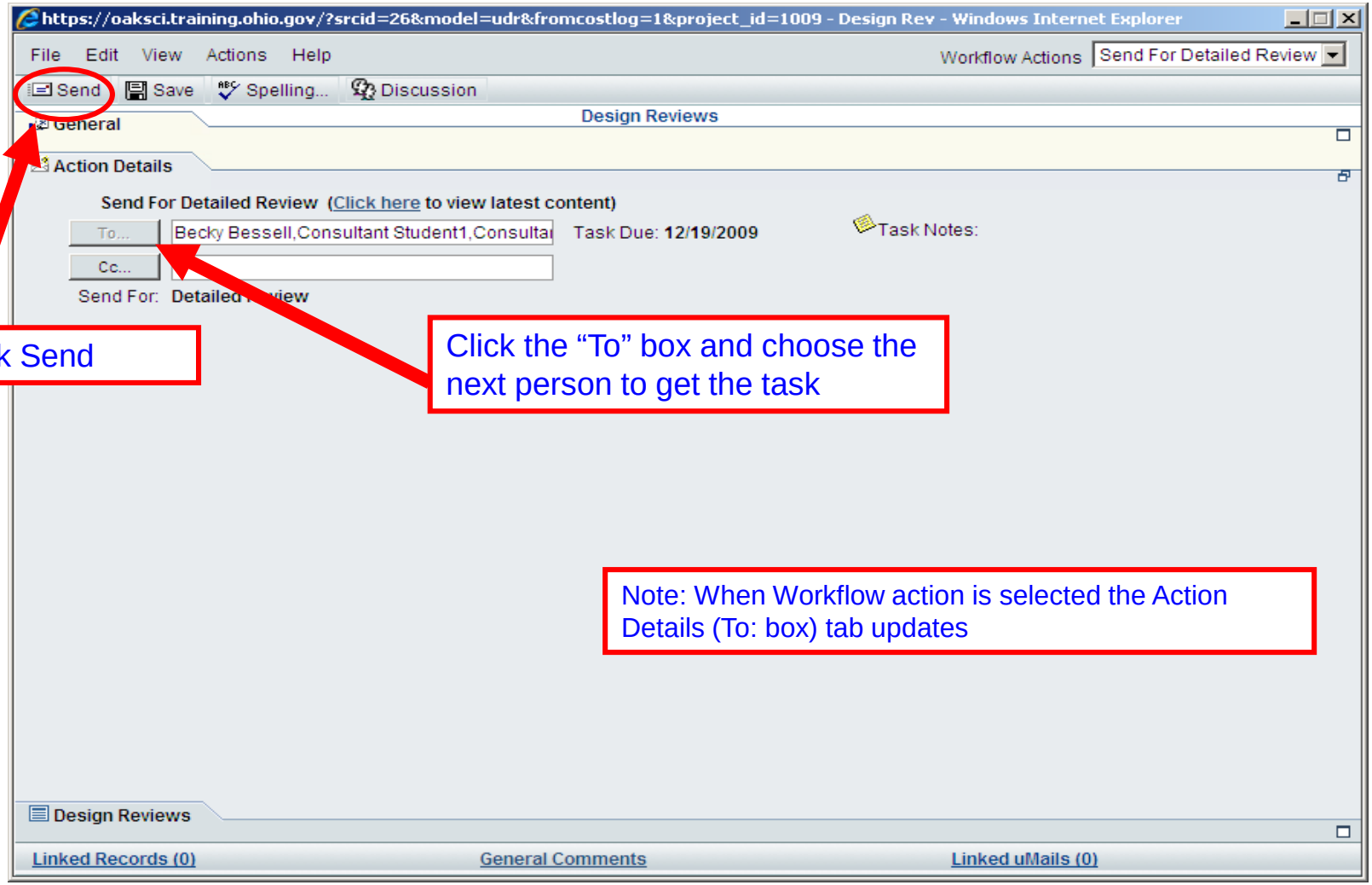
# Reviewing a Task



# Responding to a Task

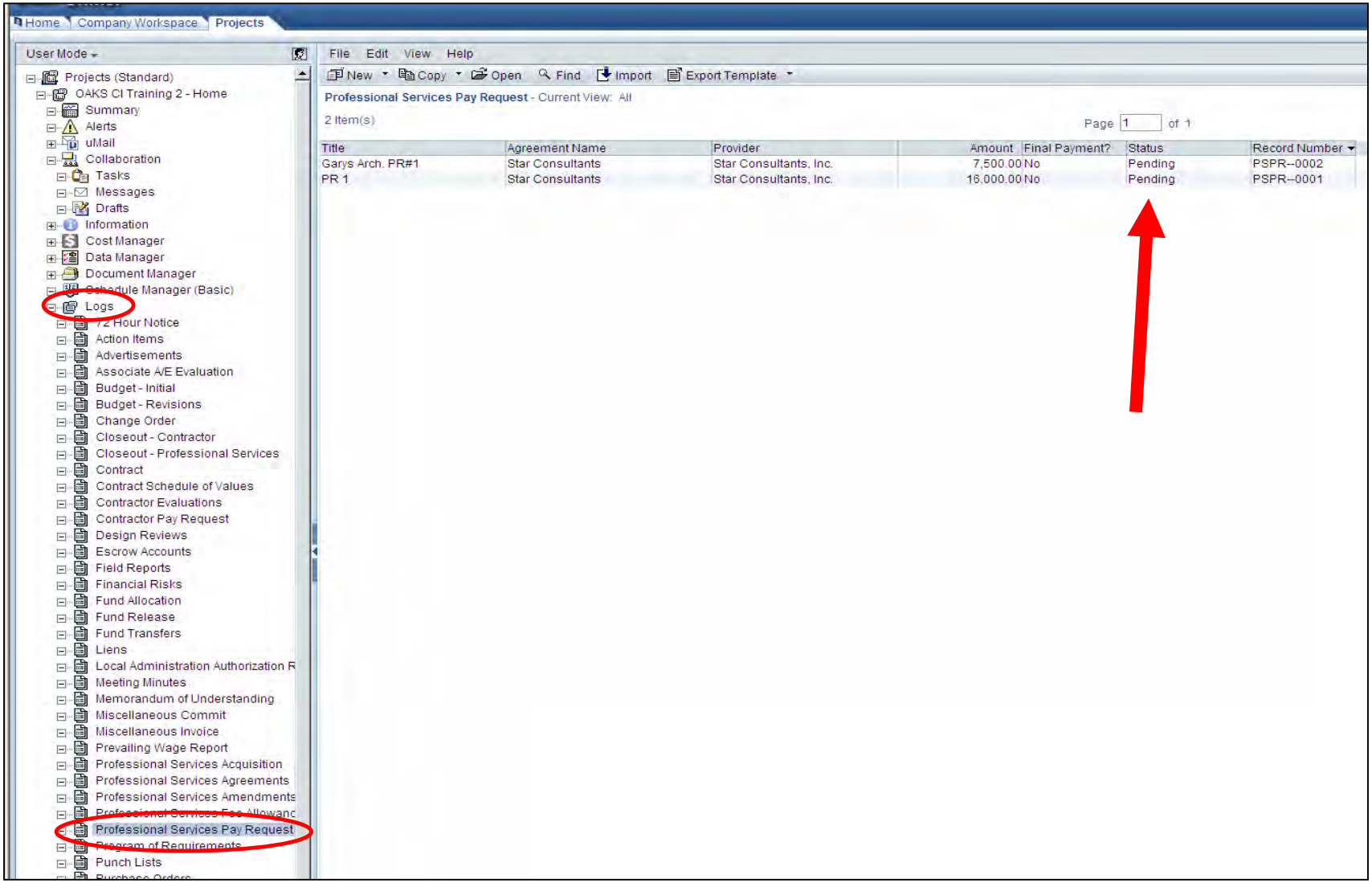


# Responding to a Task

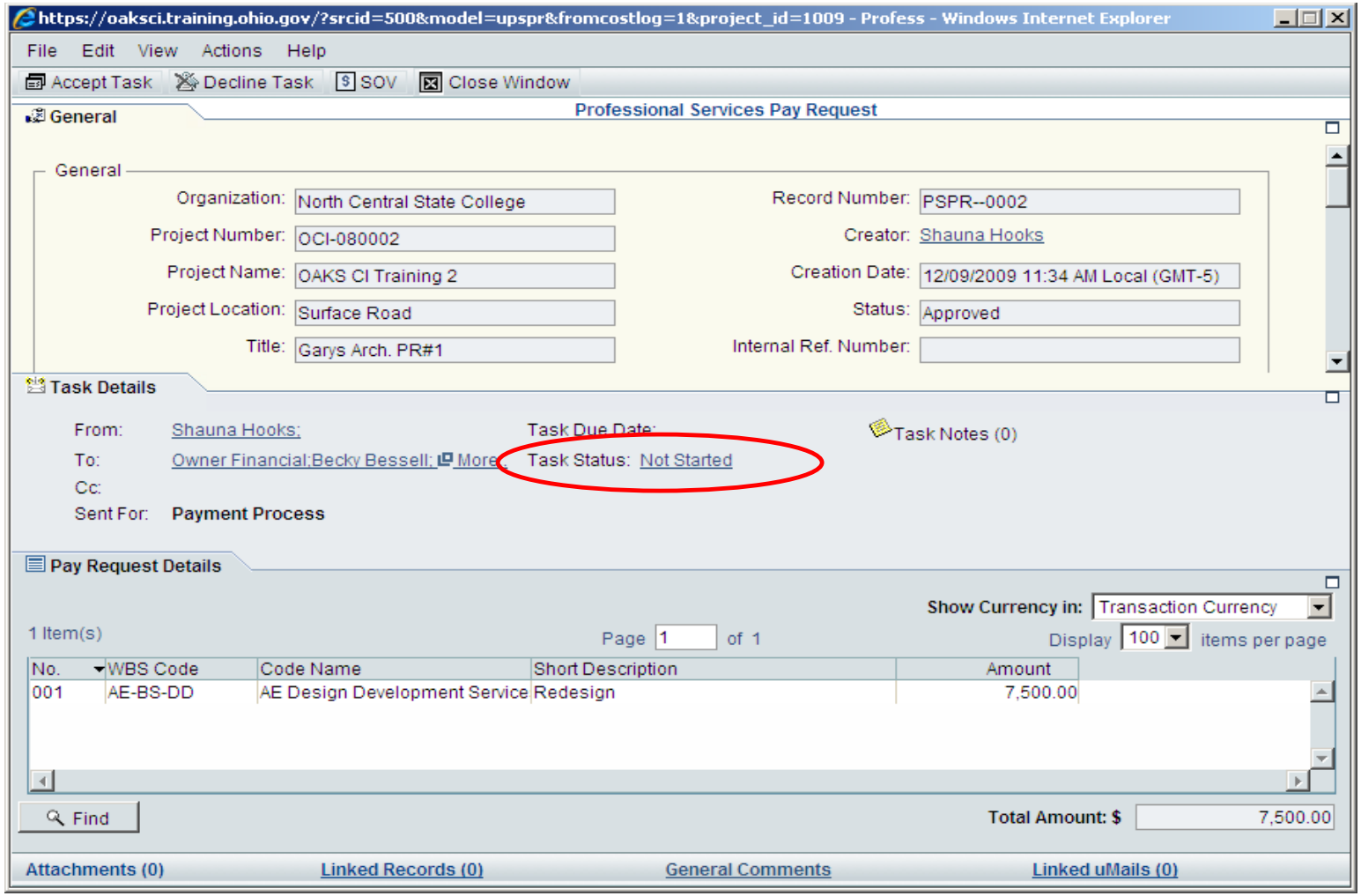


# What if I want to know the status of my Record?

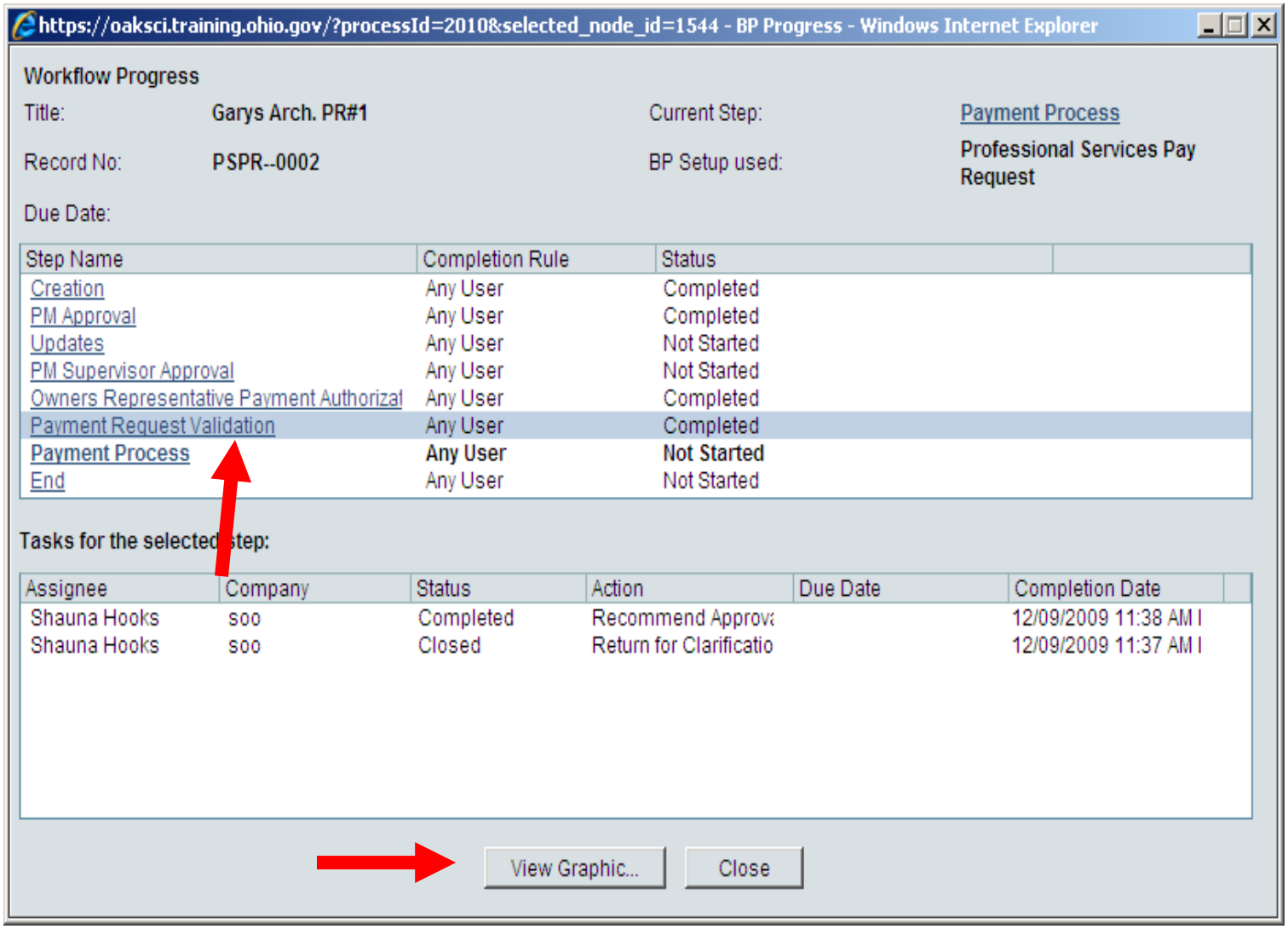
# Finding the Record Status



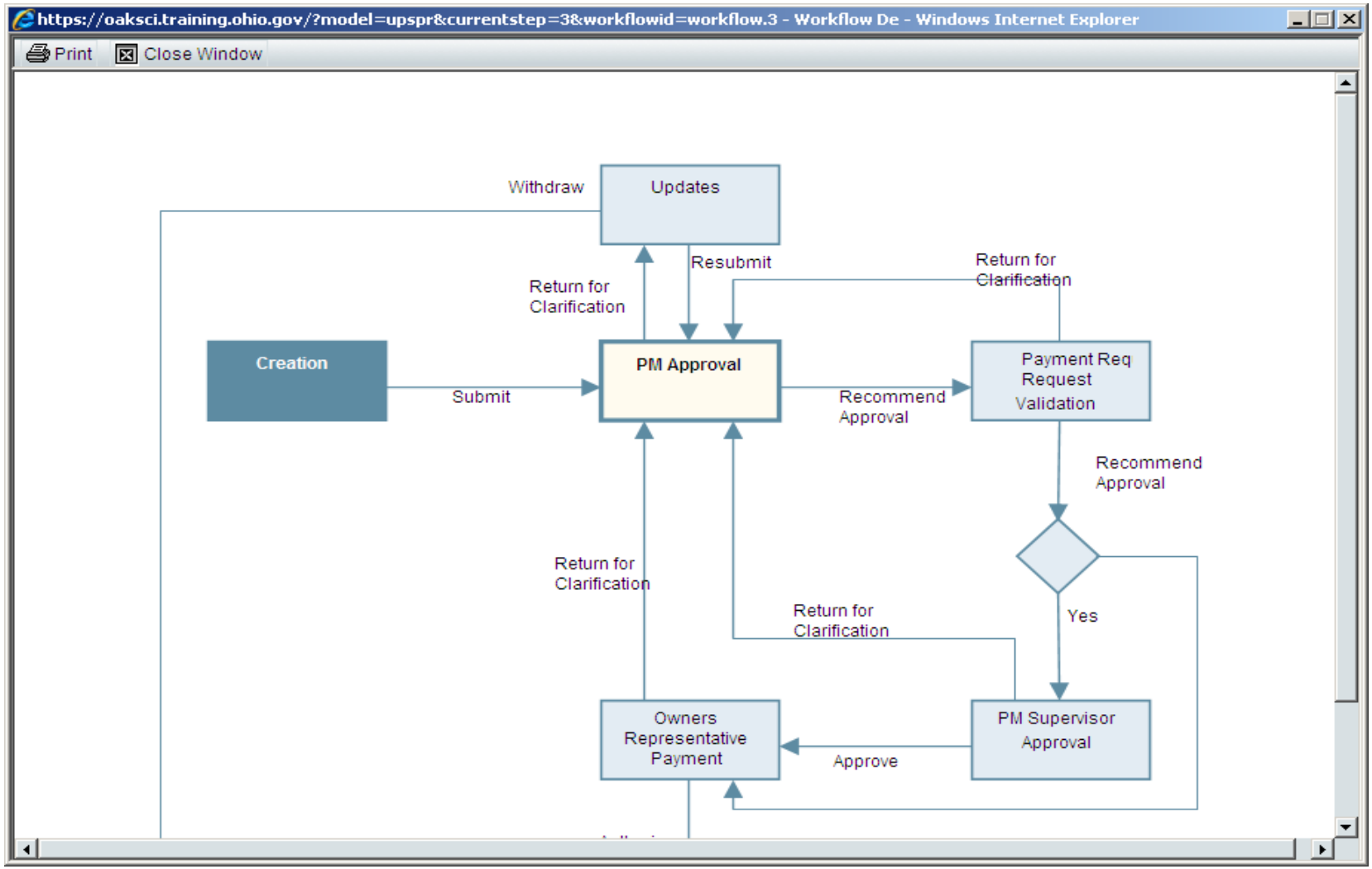
# Finding the Record Status



# Finding the Record Status



# Graphic View of Workflow



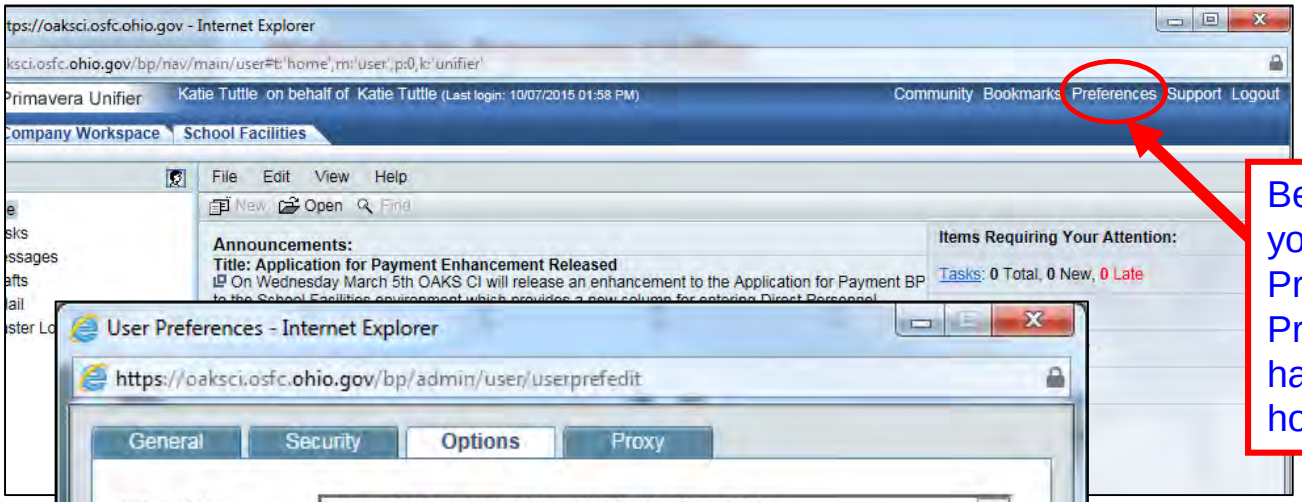
# Document Manager

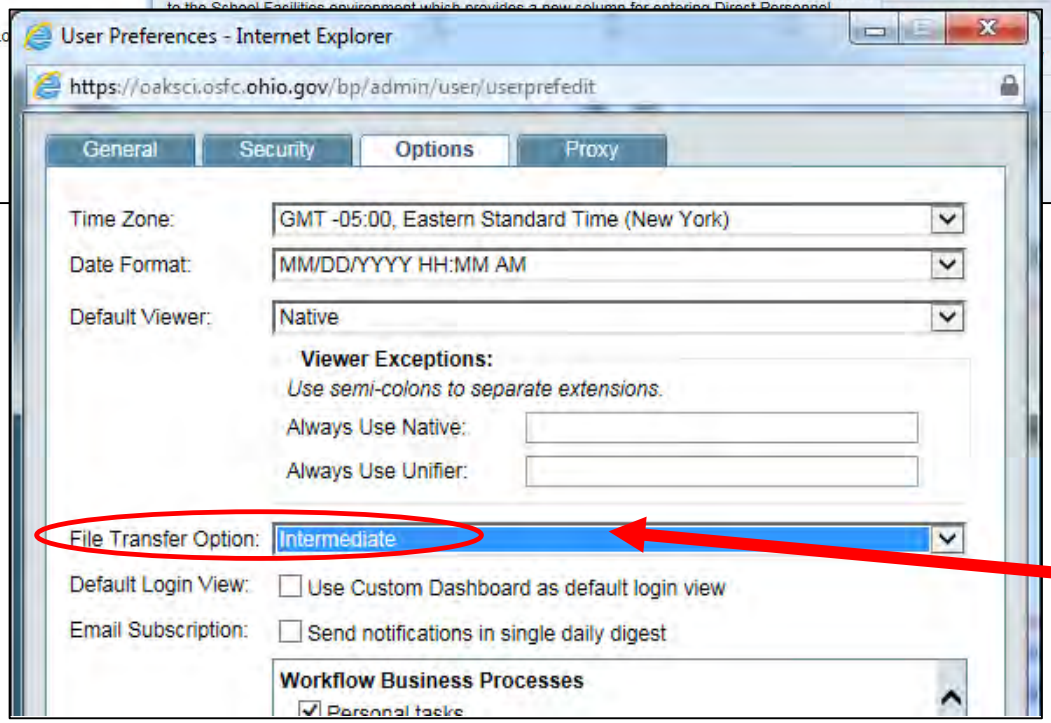
# About Document Manager

- Document Manager houses all of 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

# Preferences

**Note: Intermediate level does not appear to be compatible with IE or Chrome, however, Firefox appears to be successful.**

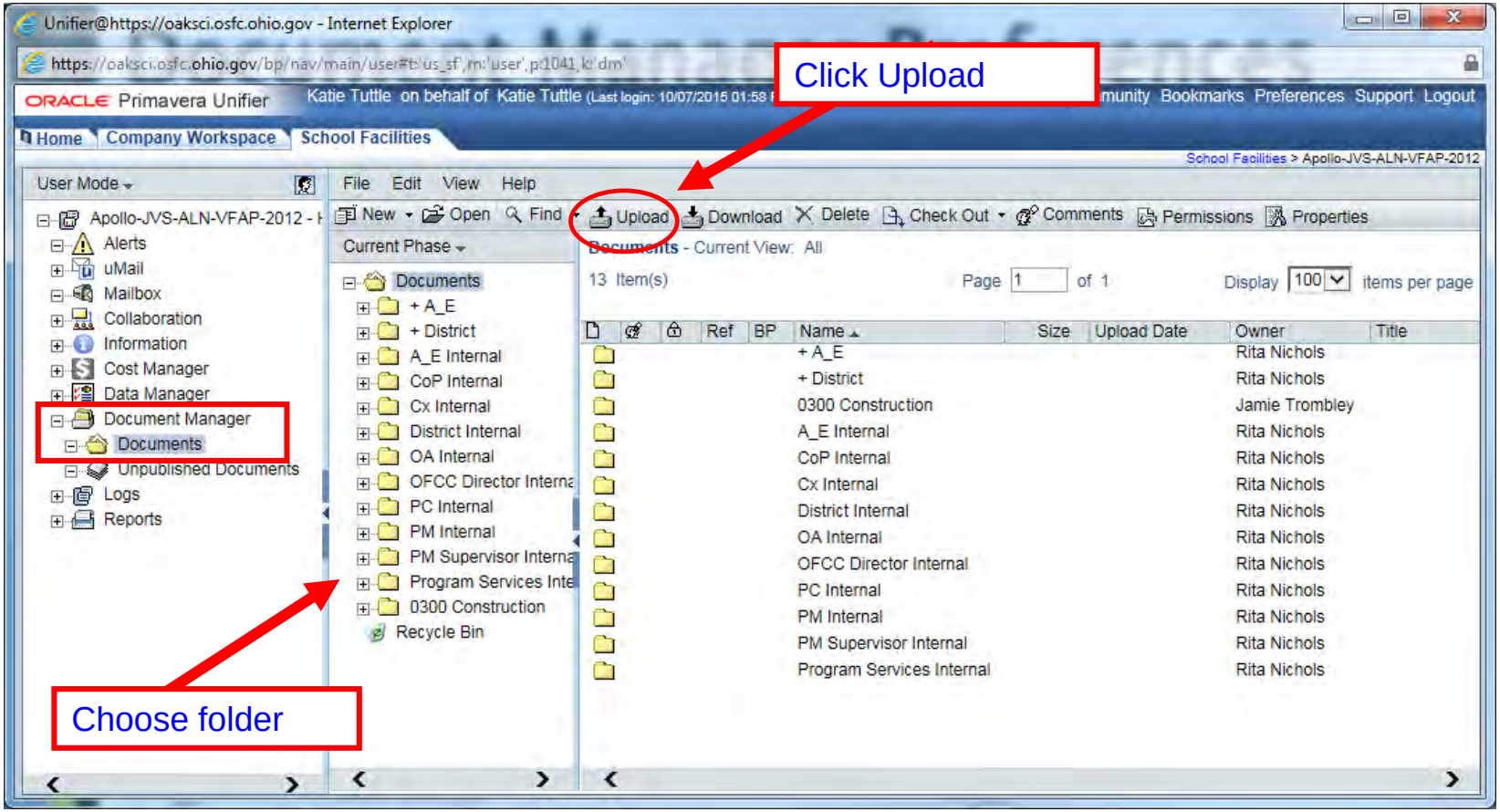


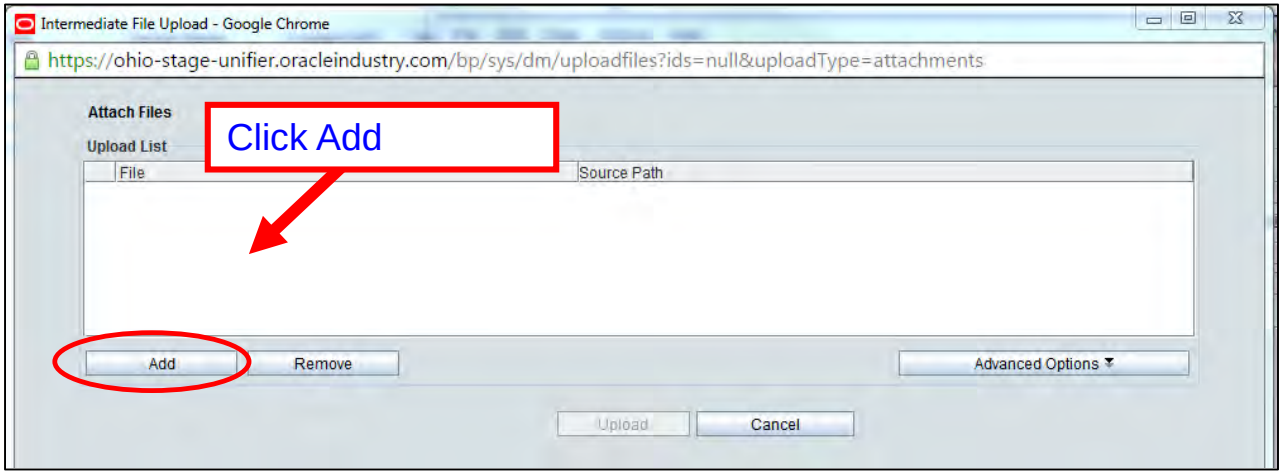

Before uploading, check your File Transfer Preferences by clicking Preferences at the right hand corner of your homepage

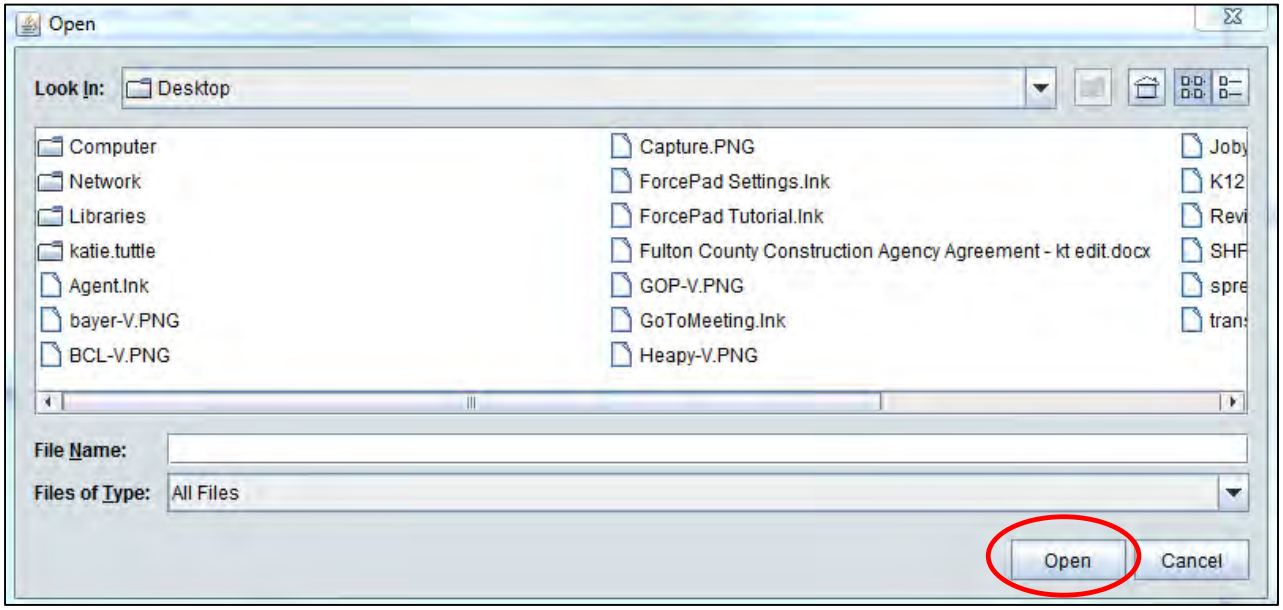
Under the Options Tab, select Intermediate for your File Transfer Option

# Document Upload



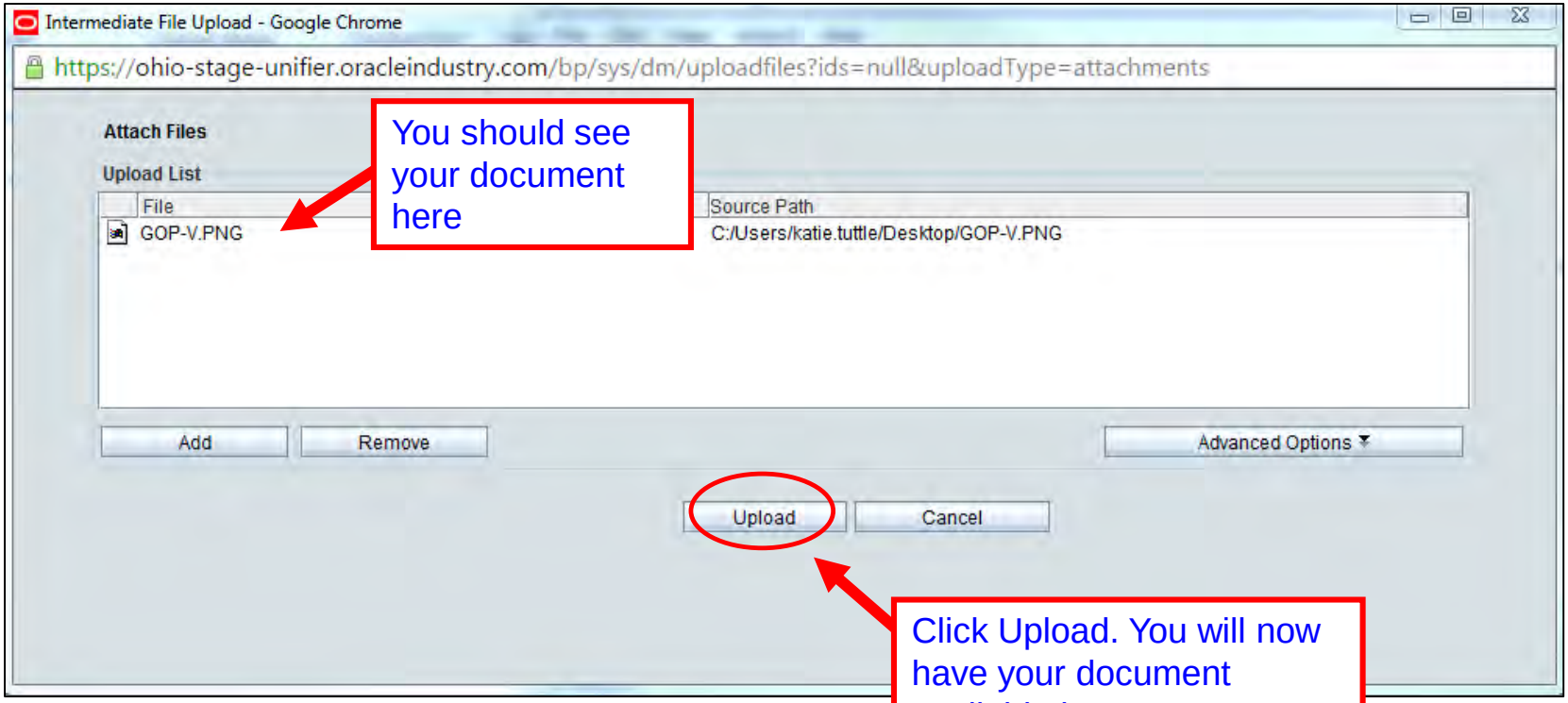
# Document Upload– Intermediate



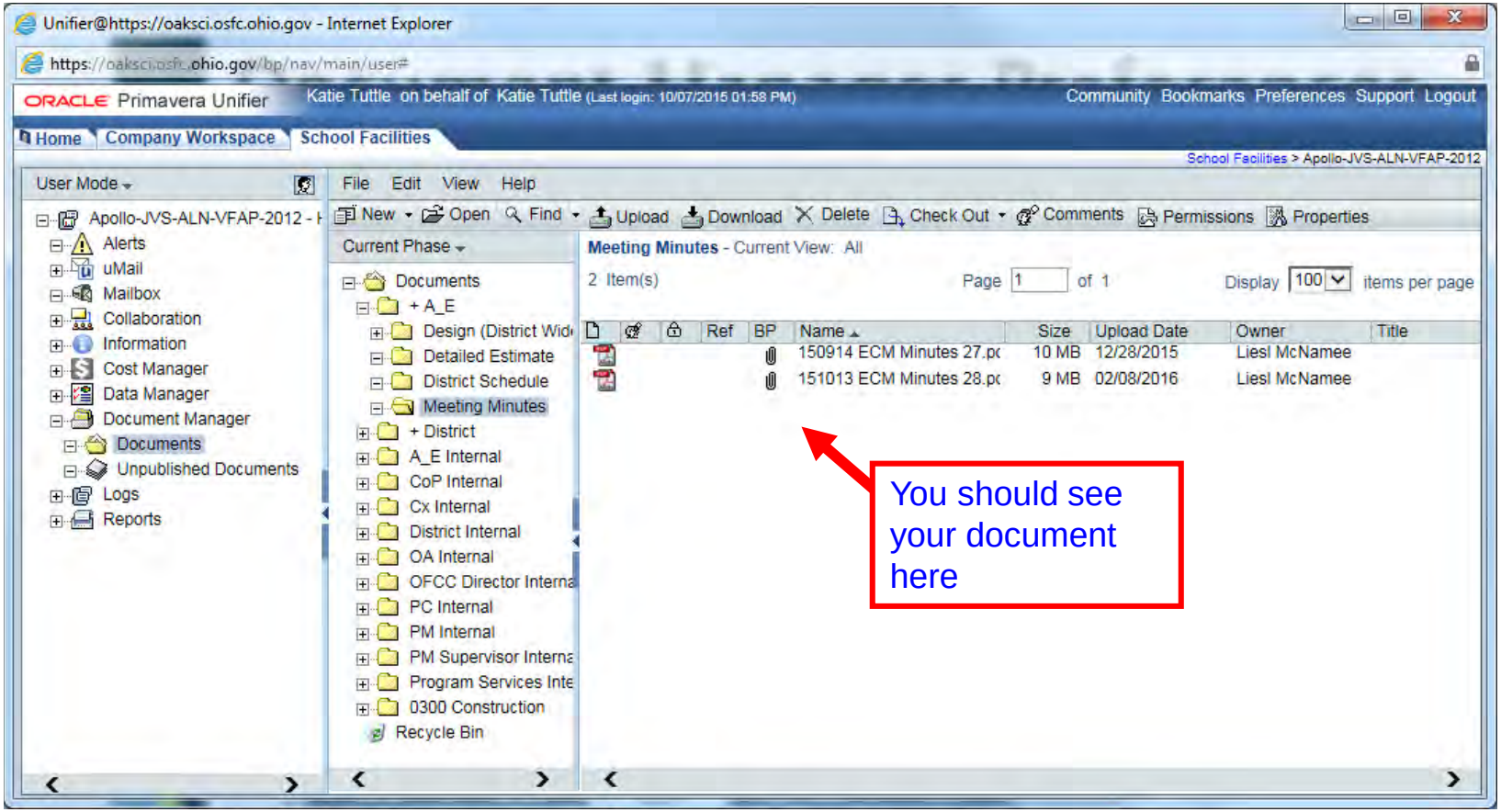




Choose your document and click Open

# Document Upload– Intermediate



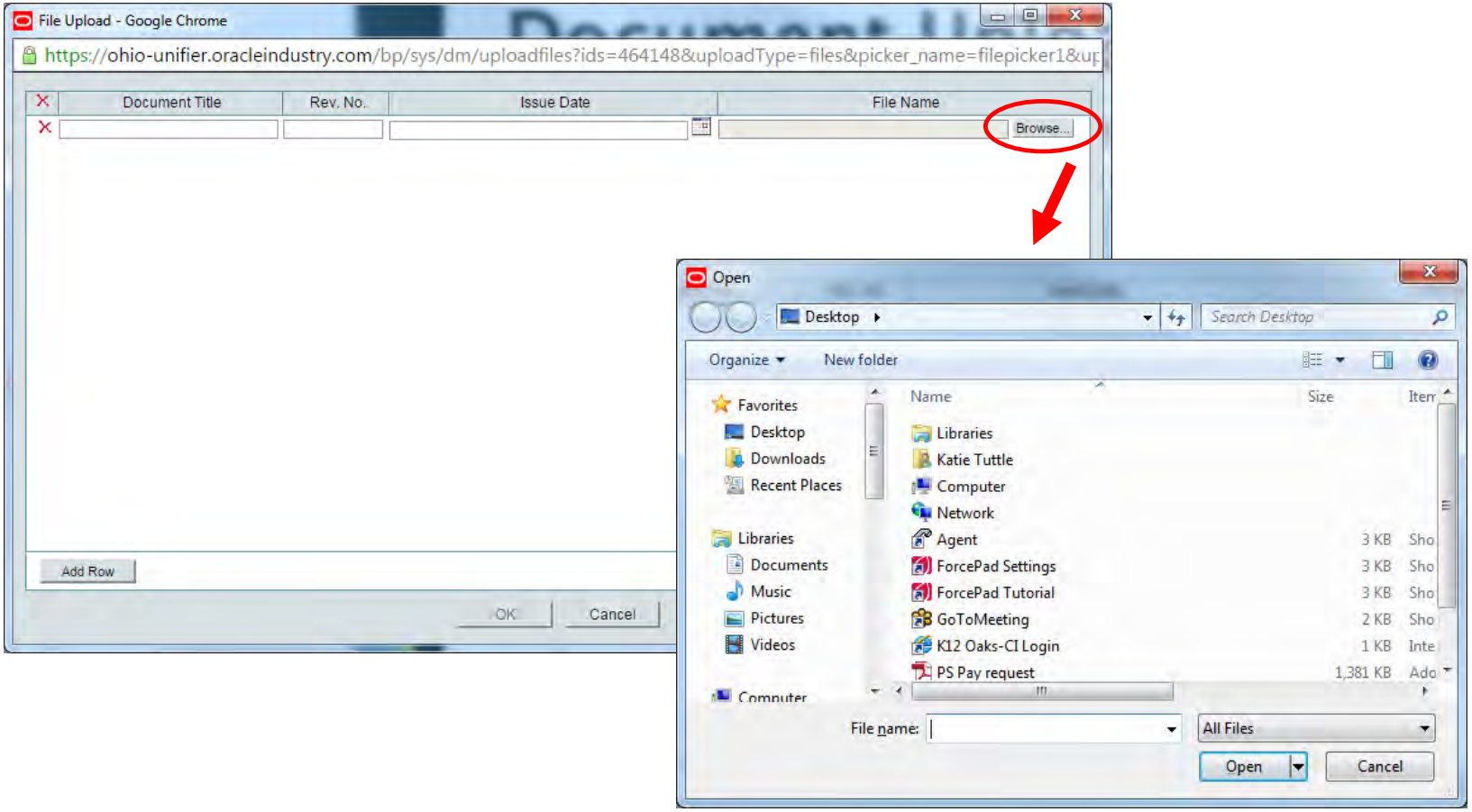
# Document Upload




- Now that your documents have been uploaded into Document Manager they can now be attached to Records

# Document Upload–Basic

- If you get an error message or a blank screen when attempting to upload your documents, you may need to change your File Transfer Option to Basic in your Preferences.
- With Basic upload,  you can only add one document at a time



# Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211