



# Training Request Reminder

- All training requests can be submitted to [katie.tuttle@ofcc.ohio.gov](mailto:katie.tuttle@ofcc.ohio.gov)
  
- When requesting training, please provide the following information:
  - Project name and number
  - Type of Project (GC, CMR/DB, etc.)
  - Design or Construction Phase (if applicable)
  - Training Attendees (A/E, Contractor, District Staff, Owner)
  - In Person (Surface Rd. training room, 3<sup>rd</sup> Floor BWC) or WebEx
  - Three date suggestions
  
- All project managers and coordinators are highly encouraged to attend trainings with the members of their project team. It is a great opportunity for team support and collaboration. It also gives the PM and PC the opportunity to discuss specifics of their project related to the OAKS CI system.



# Training Information

<b>Training Session</b>	<b>Length</b>	<b>Audience</b>	<b>Topics Covered</b>
Introduction to OAKS CI	1 hour	Any system user	<ul style="list-style-type: none"> <li>– Managing your password</li> <li>– Basic navigation of OAKS CI</li> <li>– Working with tasks, messages and drafts</li> <li>– Creating and finding records in logs</li> <li>– Using document manager (K12 Legacy and Agency)</li> </ul>
Design Phase Training	3 hours	A/E	<ul style="list-style-type: none"> <li>– Introduction to OAKS CI</li> <li>– Subcontractor/Supplier Declarations</li> <li>– Professional Service Amendments</li> <li>– Professional Services Pay Request</li> <li>– Design Reviews</li> <li>– Meeting Minutes</li> </ul>
Construction Phase GC Training	3 hours	Contractor, A/E	<ul style="list-style-type: none"> <li>– Introduction to OAKS CI</li> <li>– Subcontractor/Supplier Declarations</li> <li>– Contract SOV</li> <li>– Change Orders</li> <li>– Contractor Pay Request, including Certified Payroll</li> <li>– RFI</li> <li>– Submittals</li> <li>– Meeting Minutes</li> </ul>
DB/CMR Training	3 hours	Design Build Team or CMR Team	<ul style="list-style-type: none"> <li>– Introduction to OAKS CI</li> <li>– Subcontractor/Supplier Declarations</li> <li>– Contract SOV</li> <li>– GMP Amendment</li> <li>– GMP Subcontract Distribution</li> <li>– Change Orders</li> <li>– Contractor Pay Request, including Certified Payroll</li> <li>– Design Reviews</li> <li>– Submittals</li> <li>– Meeting Minutes</li> </ul>
School District Staff Training	2 hours	School District Staff	<ul style="list-style-type: none"> <li>– School District Roles in OAKS CI</li> <li>– Introduction to OAKS CI</li> <li>– Recording Purchase Orders</li> <li>– Approving Pay Applications</li> <li>– Recording Vouchers and Applying to Application for Payment</li> </ul>
Agency Owner Training	3 hours	Agency Owners and Owner Financial	<ul style="list-style-type: none"> <li>– Introduction to OAKS CI</li> <li>– Recording Purchase Orders</li> <li>– Approving Pay Requests</li> <li>– Recording Vouchers and Applying to Pay Request</li> </ul>