OAKS CI FAQs (Agencies & Higher Education)
State of Ohio Standard Forms and Documents

Q. Is there a quicker way to retrieve my user name and password?

A. Log into OAKS CI, Go to Preferences, click Security, set your security questions, this way if you forget your password it can be easily retrieved, be aware that after 5 unsuccessful attempts the system will lock your access and you will be required to contact the OAKS CI helpdesk at 1.614.644.2211.

Q. I am attempting to upload a document into document manager but I keep getting an error message, how do I fix it?

A. Insure that you have completed your 1st time user set up. If that has already been completed, Log into OAKS CI, go to Preferences, click Options and make sure that the File Transfer Option is set to Intermediate, if it is and you are still having issues change it to Basic.

Q. I am attempting to submit a record , but I keep getting the error message "No known users" what do I do?

A. This error message will usually happen when the work flow is attempting to send the record to the Lead Contractor or Construction Manager, in these instances you must contact your Project Manager or Project Coordinator or call the OAKS CI help desk.

Q. I am attempting to respond to a Submittal but don't know how?

A. When responding to a Submittal you must click the General Comments button at the bottom of the record, then click Add, once you do that you will have the ability to attach any documents or notes you wish to attach, keep in mind that any documents you attach must first be uploaded into document manager.

Q. I am creating my Prevailing Wage Report record, how many weeks should be included in each record?

A. Each Prevailing Wage report should include all weeks of the pay request, insure that all of your certified payrolls are uploaded into document manager and attached to your Prevailing Wage Report record. Once finished, put the Prevailing Wage Report record into the Pending status and click Finished Editing, this will allow you to come back to the record and update as necessary, once you have COMPLETELY finished with the record, change the status to Complete and click Finish Editing , be aware, once you change the status to Complete and click Finish Editing you will no longer have access to Edit the record.

Q. I am having a lot a problems with the system, how do get a refresher?

A. **Go to http://ofcc.ohio.gov/Resources/OAKSCI/AgencyHigherEdTraining.aspx**, here you will find links to prerecorded trainings and PDF walk thru's.

Q. A record came back to me for update, how do I fix line items?

A. Specifically for pay request's, highlight the line item to be fixed , click Remove, then click Add and re-add the line item, take note of the short description associated with the line item you removed. For all other records that need line item updates, highlight the line in need of fix, click Copy, on the copied line item make the changes, once done, click ok, then highlight the wrong line item and click remove.

Q. I submitted a record and need to know the status?

A. Log into your Project, click on Logs, click the record type you wish to see the status of, you will see a list of all records submitted, double click on the record and you will see who the record is with and the status of the record.

Q. **How do I create a Change Order?**

A. The CO is usually created by the A/E but can also be created by the Contractor. The process has been broken down into two steps:

Step 1   In the Creation step the A/E or Contractor completes the upper form describing the scope and justification for the change.

Step 2   The record is then submitted and sent to the Contractor to complete the lower form in the Proposal Creation step. If the Contractor is creating the Change Order, they must submit the record to themselves in order to complete the Proposal Step. The Lead Contractor has no role in the Change Order process.