

# OAKS CI News Archive

Ohio Facilities Construction Commission  
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## January 2013 OAKS CI Notes

### Need help with OAKS CI? | Contact our new Help Desk

OAKS CI has established a new help desk, which will allow you to reach the OAKS CI staff directly. Whether it's a password reset or a new project you can call: 614-644-2211 or e-mail: [oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov) for assistance. Effective immediately this contact information should be used in place of the OAKS help desk you have contacted in the past.

### Update for Submittals Business Process

The Submittals Business Process has been modified to allow Associates (A/Es) to add, delete and modify line items at the Associate Review Step. In addition, Associates will be able to remove and add attachments.

Thank You,

The OAKS CI Team

## October 2012 Update Release Notes

OAKS CI has scheduled two significant updates for Monday October 8th Included in the release are updates to Change Order and Project Information.

A brief description of each enhancement follows:

### Change Order

1. The signature blocks for Change Directive and Change Orders have been modified to populate automatically based on the workflow actions taken. Each time the A/E, CM, PM, Contractor, Owner, or Director takes a workflow action accepting, approving, or signing the change order three fields in the signature block will be automatically populated with the user's name, the action taken, and the date and time. Records returned for clarification will not be updated. If an individual approves the record twice due to a return for clarification executed later in the workflow, the second approval will overwrite the first approval. Both approvals may be viewed in the workflow progress display or in the audit log.
2. The Description of Work and Justification fields under the Change Order Detail block are now modifiable by the Project Manager in the PM Review step.
3. References to Field Work Order in step names and workflow actions have been updated to use the new term Change Directive.

### Project Information

1. The Project Information form has been reorganized.
2. The Project Cost and EDGE information blocks are moved to the upper portion of the form.

The Internal Project Team block has been reorganized to better support a range of project circumstances including locally administered, OFCC administered, and university administered projects.

## February 2012: Several universities begin using OAKS CI

The roll-out of the OAKS Capital Improvement (OAKS CI) system to state colleges and universities has been gaining momentum.

OAKS CI is a web-based construction management system which makes data on construction projects readily available to the entire project team, including the Owner, Architect/Engineer and Contractor(s). It contains electronic document approval and tracking through workflow, budget control and cost tracking mechanisms and powerful reporting and information query tools.

Since fully implemented in 2009, OAKS CI now contains more than 300 projects and 1,600 users. The State Architect's Office, Kent State University and several state agencies are currently using the system for all bid projects.

In recent months, there has been an increased interest from the higher education community to implement the web-based system for their capital construction projects. Cleveland State University has begun their fourth project in OAKS CI, Miami University is beginning their first project, Wright State University is in the process of testing their workflows and The Ohio State University is working on testing OAKS CI as a whole. Several more universities have expressed interest in using OAKS CI with discussions, demonstrations and implementation planning ongoing.

Institutions of higher education interested in learning more about implementing OAKS CI should contact OAKS CI Program Manager Steve Mayo at [steve.mayo@das.state.oh.us](mailto:steve.mayo@das.state.oh.us). For more information about OAKS CI, please visit the OAKS CI website at <http://ci.oaks.ohio.gov>.

### **November 2011: Managing projects the OAKS CI way**

Do you find yourself doing twice the amount of work to get project information into the OAKS Capital Improvements (OAKS CI) system? If so, why not let OAKS CI do the work for you?

OAKS CI is a workflow system. This means that your work, whether it's a payment request or approval, can take place in OAKS CI, replacing the paper forms.

Do it the OAKS CI way! Allow the system to handle the calculations, approval routings and project information and only do the process once!

### **November 2011: Internet Explorer 9.0 now supported by OAKS CI**

The OAKS Capital Improvements (OAKS CI) Unifier system has been upgraded from version 9.4 to the recently released version 9.6. The most notable enhancement in this release is Unifier's support of Internet Explorer 9.0 (IE9), which was released in March.

Users who are currently running IE9 no longer need to use the compatibility mode in OAKS CI and any previous issues that may have been experienced are now resolved.

### **August 2011: OAKS CI browser compatibility update**

The OAKS CI team has noticed that many users are in the process of updating their Internet Explorer browsers to the newest version of Internet Explorer 9.0 (IE9), which was released in March. However, OAKS CI does not yet support IE9.

OAKS CI users who have already upgraded to IE9 can resolve this issue by either using the "compatibility mode" in IE9 or by simply uninstalling IE9 and re-installing a previous version of Internet Explorer.

To use the compatibility mode in IE9, select Tools - Compatibility Mode. Then, users must re-configure their computer to use the OAKS CI application. Click here to view the 15-minute webinar training session or visit the OAKS CI website at <http://ci.oaks.ohio.gov> and click on Training and Webinar Opportunities, then OAKS CI Pre-recorded Sessions. For written instructions on how to re-configure your computer to use the OAKS CI application, [click here](#).

### **July 2011: Double the Trouble?**

Do you feel like you are going through the change order process twice? Are you using paper forms and then entering the information in OAKS Capital Improvements (OAKS CI)? Most of the time you can enter your change order directly in OAKS CI which will cut the process time in half and allow you to benefit from the workflows in the system.

To learn more about creating a change order, field work order and proposal request, please view the OAKS CI pre-recorded training sessions via the OAKS CI website at <http://ci.oaks.ohio.gov> and click on "Training and Webinar Opportunities."

### **June 2011: Training opportunities for OAKS CI users**

Ongoing training is key to the success of any project management system. The OAKS Capital Improvements (OAKS CI) staff understands the need to not only train new users, but keep existing users up-to-date on new processes or modifications as they are developed. It is important to us that all project team members and stakeholders have access to all the information that

is required to complete their project responsibilities in a timely and effective manner. That's why a variety of training opportunities are offered for OAKS CI users.

As mentioned in the May SAO eNews, the OAKS CI team now provides live online training sessions on a wide range of topics, such as creating payment requests and requesting change orders. These trainings are usually one hour in length and provide users with hands-on training which can be accessed anywhere there is an Internet connection. A link is provided for each topic which connects users directly to the class. Registrations and passwords are not required.

In addition, the OAKS CI team has established a growing library of pre-recorded OAKS CI trainings which can be viewed at any time via the OAKS CI website.

Traditional classroom training opportunities will continue to be provided on a regular basis. Classroom training is scheduled through the project manager or project coordinator assigned to each project.

To access OAKS CI training opportunities, go to <http://ci.oaks.ohio.gov> and click on "Training and Webinar Opportunities."

### **May 2011: OAKS CI offers live online training classes**

The OAKS Capital Improvements (OAKS CI) team has begun offering live training sessions online. These sessions are one hour in length and cover specific topics for select users of the OAKS CI system, including, but not limited to, agency representatives, professional design firms, contractors, project managers, project coordinators and fiscal staff.

On May 4 and 11 respectively state agency representatives and contractors learned about the proper processing of payment requests. Below is an upcoming session for professional design professionals on the submittals business process. Submittals include product data, cost estimates, schematics, diagrams, schedules, shop drawings and other documents important for the successful completion of a construction project.

May 18, at 9:30 to 10:30 a.m. - Architect/Engineer Submittal Review

To log on to a session, go to the SAO website at <http://ohio.gov/sao> and click on Training and Outreach Calendar. A link is provided for each session. Pre-registration is not required and there is no cost associated with these classes.

Additional live training sessions will be announced periodically and posted to the website listed above.

The OAKS CI group continues to offer classroom instruction and pre-recorded WebEx training opportunities for all users of the OAKS CI system. Classroom training is scheduled through the project manager or project coordinator assigned to each project. Pre-recorded WebEx trainings are available at the above website.

For more information about OAKS CI, go to <http://ci.oaks.ohio.gov>.

### **April 2011: OAKS CI releases enhanced change order process**

OAKS Capital Improvements (OAKS CI) has released several important enhancements into production. Included in the release is a major rebuild of the change order business process and a defect correction in the meeting minutes business process.

The change order business process now includes separate workflows for field work orders, proposal requests and request for change order. Field work orders and proposal requests can only be initiated by the Architect/Engineer (A/E). The request for change order is initiated by the Contractor.

Below is a list of the enhancements that were made:

- Contractors are now able to complete both the upper and lower form on the create step which eliminates the need for an additional step in the workflow.
- Contractors may use the "add additional assignees" feature to transfer the change order to another OAKS CI user in their company.
- A new project manager review step has been created which involves the project manager before the change order is routed for approvals.
- The basis of change order is now available for the A/E to complete and is required at the project manager review stage.
- All approvals and recommendations are now required fields.

- A validation has been added when the change order is written to the schedule of values business process to prevent individual line items from being changed to a negative amount. If a line item is a negative amount, the contracting authority (typically the project manager) will not be allowed to approve the record and must return for clarification to the contractor for correction. Contractors, project coordinators and project managers are encouraged to manually look for negative amount line items early in the review process.

The change order help files located within the OAKS CI project management system have been updated and a question-answer document has been posted to the OAKS Capital Improvements website at <http://ci.oaks.ohio.gov>. The meeting minutes business process was updated to correct a defect in the title field on the automatic e-mail notifications. Any previous title fields remain available in read-only format for reference and both titles are displayed on the business process log.

For more information about OAKS CI, go to <http://ci.oaks.ohio.gov>.

### **February 2011: OAKS CI required for locally administered agency projects**

Since July 2010, all state agencies locally administering capital improvement projects have been required to use OAKS CI as their project management system for all new projects. In addition, agencies were required to transition any existing projects in either the design or construction phase to OAKS CI by the end of 2010.

Classroom instruction and WebEx training is continuously offered for all users of the OAKS CI system, including, but not limited to agency representatives, Architects/Engineers, contractors, project managers and fiscal staff. The OAKS CI program team has developed specific training programs based on the need of the project team. Example topics include project initiation, contracts, payment requests, construction phase activities and change orders.

Training opportunities and WebEx recordings can be found at the OAKS CI website at <http://ci.oaks.ohio.gov> or via the State Architect's Office website at <http://ohio.gov/sao>. Agency representatives should contact their SAO project manager or project coordinator in order to be trained with their project team.

OAKS CI is a cradle-to-grave construction management system for State of Ohio-sponsored capital improvement projects. It is available to all state-funded agencies and institutions of higher education.

Currently there are approximately 200 active projects with more than 1,250 users in OAKS CI. The State Architect's Office and Kent State University are currently using the system for all bid projects. In addition, Miami University is piloting selected projects. Discussions, demonstrations and implementation planning with other institutions of higher education interested in using the system are ongoing.

### **January 2011: OAKS CI upgrades to Skire Unifier version 9.2.4**

OAKS Capital Improvements (OAKS CI) released several important enhancements to the Unifier project management system in December. Included in this release is an upgrade to Skire Unifier version 9.2.4 and the initial release of three new business processes. A partial list of enhancements provided by the upgrade to Unifier 9.2.4 follows:

The user/group "picker" now includes a search function you can use to filter the user/group list and locate specific users or groups.

Ability to search for specific WBS (work breakdown structure) codes in a "tree" structure

Users can now change the display of their tasks logs by adjusting column widths and sorting column data. The system will remember these preferences and display them whenever the user opens the tasks log.

When data has been added or modified on a business process form and the user has not saved the changes before attempting to close the form window, the system will now prompt the user to save the form.

Audit logs now display the time stamp of the event. Audit details also display the time zone used for the date/time stamp. This enhancement applies to all audit logs available within the system.

The "search by content" defect in the document manager was corrected.

Further information on these and other Unifier 9.2.4 enhancements can be found by selecting "Unifier Help" from the help menu at the top of the OAKS CI screen and then viewing the topic "What's new in this release."

### **January 2011: Three new business processes added to the OAKS CI system**

Three new business processes were added to the OAKS Capital Improvements (OAKS CI) system in December: contractor evaluation, professional services evaluation and project milestone.

A new contractor evaluation business process has been provided which now matches the current SAO contractor evaluation form (SAO-F140-99). A contractor evaluation can be initiated by anyone on the project team including sponsoring agency users, the contracting authority and their staff, the architect/engineer, consultants and contractors. The business process can be used to evaluate contractors, subcontractors and material suppliers. All evaluations will be reviewed by the project's project management supervisor (PM Supervisor). In addition, two new user-defined reports have been provided to retrieve contractor evaluation data. These reports will be available to individuals working in the contracting authority role on both SAO and locally administered construction projects.

Similar to the new contractor evaluation business process mentioned above, a new professional services evaluation business process has been provided which now matches the current SAO professional services evaluation form (SAO-F110-99). A professional services evaluation can be initiated by anyone on the project team including sponsoring agency users, the contracting authority and their staff, the architect/engineer, consultants and contractors. The business process can be used to evaluate architects, engineers, consultants and construction managers. All evaluations will be reviewed by the project's PM Supervisor. In addition, two new user-defined reports have been provided to retrieve professional services evaluation data. These reports will be available to individuals working in the contracting authority role on both SAO and locally administered construction projects.

Finally, a new project milestone business process has been provided to track key dates through the life of the construction project. Original plan, current plan and actual dates from design and construction milestones are collected in this business process. The project team can add additional milestones for collection as needed. The project milestone business process is maintained by the project manager, project coordinator or PM Supervisor roles and is viewable by sponsoring agency and administration user roles. Data collected by this business process is used to calculate SAO metrics and is available for project administration reports.

#### **November 2010: OAKS CI looks to the future**

The OAKS Capital Improvements (OAKS CI) change management committee held a meeting in early November to discuss high-level enhancements and future modifications to the statewide capital improvements project management system.

Formed nearly two years ago, the committee meets regularly to introduce and formally discuss and approve project management changes to the OAKS CI system. They work hard to ensure that significant changes are implemented in an orderly, controlled and systematic fashion with minimum disruption to users.

The OAKS CI change management committee includes David Chovan, business manager for the General Services Division; Lane Beougher, program services manager for the State Architect's Office; and Mary Richards, fiscal officer for Kent State University; and is convened and facilitated by Steve Mayo, project manager for OAKS CI.

Representatives of Kent State University and the State Architect's Office were instrumental in the design and development of OAKS CI from its inception and have been using the system since 2008 with more than 150 capital improvements projects combined.

Major topics of discussion during the November meeting included the need for professional services and contractor evaluation business processes, improvements to the change order and field work order process, revisions to the submittals business process and adding additional reporting capabilities.

#### **October 2010: OAKS CI rolls out several new enhancements**

Over the past several months, the OAKS Capital Improvements (OAKS CI) team has been working hard to implement several important improvements to the OAKS CI project management system. Many of these improvements were suggested by current users of the system. Users are encouraged to continue to provide feedback and suggestions to the OAKS CI system as we continue to manage and implement new projects.

Some of the major improvements include:

- The Professional Services Agreement business process now references up to five purchase orders allowing Owners to identify how the professional services payment request will be distributed between multiple purchase orders. Purchase orders can now be entered either at the time the agreement is initially funded by the Owner or at the end of the process.
- The Contractor Payment Request business process now populates the material and labor values from the Schedule of Values business process reducing extra data entry time for contractors.

- Unifier 9.2.3 was released providing improvements to the uMail system (the messaging system used within OAKS CI). The upgrade also enhanced printing capabilities and many other miscellaneous functions.
- The OAKS CI training schedule was added to the State Architect's Office online calendar and is updated regularly. Users or vendors wishing to schedule a live- or web-based training class can now simply check the SAO website at [www.ohio.gov/sao](http://www.ohio.gov/sao) and click on "SAO Training Calendar."
- In addition, certain pre-recorded OAKS CI training classes are now available via WebEx. Links to the WebEx trainings are located on SAO training calendar page at the website mentioned above.

For those not familiar with it, OAKS CI is a web-based project management system for capital construction projects and is available to all state agencies and state-supported colleges and universities as well as the State Architect's Office. OAKS CI houses all of the data on each project and provides access for members of each project team to drawings, meeting minutes, requests for information and change orders as well as contract documents, payments requests and EDGE information. Documents process through the system for approval via electronic workflow, which allows the members of the project team to track the status of each document.

For more information about OAKS CI, go to the OAKS CI website at <http://ci.oaks.ohio.gov>. Users needing assistance with the OAKS CI system may contact the OAKS help desk at 614.644.6625 or at [oaks.helpdesk@oaks.state.oh.us](mailto:oaks.helpdesk@oaks.state.oh.us) for assistance.

### April 2010: OAKS CI upgraded and enhanced

OAKS Capital Improvements (OAKS CI) was recently upgraded and several enhancements were made.

The Skire Unifier version 9.2.2 has been included in this update. Unifier 9.2.2. provides full support for Internet Explorer 8.0 without the use of compatibility view mode. Unifier will continue to work with currently supported versions of Internet Explorer 6.0 and Internet Explorer 7.0. Unifier 9.2.2 also provides several usability enhancements to the "find" function.

In addition, three enhancements to OAKS CI also will be introduced. First, the EDGE data collection process has changed. The "Additional EDGE Information" and "Additional Subcontractor Information" blocks were moved from the Subcontractor Material Supplier Declaration business process to the Prevailing Wage business process. These blocks collect information about EDGE participation by material suppliers and subcontractors that was previously collected on the contractor payment request form prior to the implementation of OAKS CI. By moving these blocks to the Prevailing Wage business process, which is submitted with each pay request, collection of the information is returned to a more logical point in the work process.

Next, two new business processes were added to OAKS CI: the Contractor Evaluation business process and the Architect/Engineer Evaluation business process. These business processes support the existing SAO contractor and professional design forms and processes.

Finally, a project template has been created to support SAO energy capital projects.

If a user encounters any issues related to these upgrades, please contact the OAKS help desk at 614.644.6625 or at [oaks.helpdesk@oaks.state.oh.us](mailto:oaks.helpdesk@oaks.state.oh.us) for assistance.

### December 2009: Utilizing the help desk for OAKS CI projects

When OAKS Capital Improvements (OAKS CI) users encounter issues using the OAKS CI application, the correct protocol is to call the OAKS help desk (Tier 1) to log a ticket. To contact the OAKS helpdesk, call 614.644.6625, 1.888.644.6625 or send an e-mail to [oaks.helpdesk@oaks.state.oh.us](mailto:oaks.helpdesk@oaks.state.oh.us).

To ensure you receive the quickest possible response, be prepared to provide the following information to the help desk agent:

- State that you are reporting an issue with OAKS CI. (Note OAKS has five modules so the key is to state your issue is with OAKS CI.)
- Provide contact information where we can reach you to discuss your problem.
- Provide your OAKS CI username.
- Provide a brief description of the problem or issue.
- If you have screen prints or other documentation, provide them using the e-mail address above.
- The initial person you talk to is a gatekeeper who will route your problem to the correct group of experts, in this case the OAKS CI level 2 helpdesk.

All tickets are reviewed on receipt and assigned to the best available person for follow up and resolution. Typically the assigned person will contact you within a few hours to begin resolving the issue.

**December 2009: OAKS CI user agreement reminders**

Recently, the OAKS Capital Improvements (OAKS CI) help desk has encountered several users logging into OAKS CI using a co-worker's credentials. This is a violation of the OAKS CI user agreement.

Each user needing access to OAKS CI must complete Form F010-01 Application for OAKS CI Access. When completing this form the potential user agrees to "not allow others to share my access and will report any security concerns related to my access to the OAKS helpdesk." Failure to abide by this policy may result in loss of access to OAKS CI.

Please contact your project manager to obtain the Application for OAKS CI Access or go to the State Architect's Web site at <http://ohio.gov/sao> and click on Forms. The form should be e-mailed to the appropriate SAO project manager for completion of the sponsorship section and approval. The project manager then forwards the application to the OAKS CI Project Administrator who will provide your username and temporary password via e-mail.

When entering OAKS CI for the first time, users must change the temporary password to a password that is more familiar. Go to Preferences > Tools > Security to change the password. Users also should set up and answer the three security questions to allow password recovery.

**July 2009: Deployment of Wave 6 completes original OAKS CI scope**

The OAKS Capital Improvements (OAKS CI) team successfully deployed the final six business processes contained in the original scope of work on June 29. OAKS CI now provides full functionality for all phases of a construction project beginning with budgeting and preparation of a program of requirements and continuing through design, construction and project closeout. New business processes include Liens, Escrow Accounts, Punch Lists, Warranties, Contractor Closeout and Professional Services Closeout.

The Liens business process records, tracks and reports project related liens. This business process records the liens by project and contractor, identifies when and by whom liens are filed and released and records the original lien amount, amounts of releases and the lien balance.

The Escrow Accounts business process records and reports any funds deposited in escrow on a project. This can include retainage, liens and statutory delay forfeiture (liquidated damages) and other miscellaneous escrows. The financial institution holding the escrow and account balances are maintained.

The Punch List business process provides a structured process for the submission, evaluation and final approval of the contractor's work. The process is initiated by the contractor and includes evaluation of the contractor's work, creation of a punch list, corrections, a final inspection and acceptance of the completed work requirements.

The Warranties business process records specific warranty information from service providers and material suppliers for each construction project. This assists the owner in organizing the warranties associated with a facility.

Contract completion is not fully realized until all work is correctly completed and accepted. A major element of contract completion is the complete and acceptable submittal of all closeout requirements. The Contractor Closeout business process documents the receipt and approval of the contractors' closeout requirements. Similarly the Professional Services Closeout business process provides an accounting of the required closeout documentation for the professional services provider.

For more information about OAKS CI, go to <http://ci.oaks.ohio.gov> or contact either Steve Mayo at 614.728.4310 or Fred Holcomb at 614.466.0830.

**February 19, 2009: OAKS CI Wave 4 went live**

The OAKS CI team deployed six additional business processes Feb. 2, collectively called Wave 4. This deployment supports activities typically performed prior to or during the contracting phase of a construction project.

Wave 4 contained four business processes associated with acquiring construction contractors. The bid planning calendar business process supports project managers and other team members in the planning of bid openings by allowing them to view any conflicts with other planned bid openings throughout the state and to run reports on all upcoming bid openings. The advertisement business process tracks the status of public improvement legal advertisements for competitive bidding by recording the publication source and dates as well as allowing the attachment of scanned copies of the legal advertisement and proof of publication. In addition, OAKS CI released the contract business process for acquiring a contractor and the contract schedule of values which begins the process for billing and payments.

The two additional business processes in Wave 4 included miscellaneous commitments and miscellaneous invoices. The miscellaneous commitments business process provides a means to record miscellaneous project-related commitments including permits, printing, fixed furniture and equipment, percent for art and other commitments not recorded as a part of agreements, amendments, contracts and change orders. The miscellaneous invoices business process provides a means to record miscellaneous expenditures to pay invoices related to miscellaneous commitments.

Wave 4 is the fourth of six releases planned for OAKS CI with full functionality expected at the end of April.

#### **December 8, 2008: OAKS CI Wave 3 scheduled to go live Dec. 12**

The OAKS Capital Improvements (OAKS CI) team has scheduled Dec. 12 for the deployment of 11 additional business processes, collectively called Wave 3. This deployment will support activities typically performed prior to or during the design phase. With the addition of the Wave 3 business processes OAKS CI can now support all activities associated with concept development, professional services acquisition and design.

This release contains five business processes associated with managing project funds. The fund allocation, fund release and fund transfer business processes provide for identifying funding sources available to the project. The purchase orders and vouchers business processes track the encumbrance and payment of funds to the project team. A project fund sheet is maintained by OAKS CI to provide current view of all project funding.

All project-related purchase orders and vouchers are still created and processed in OAKS Financials (OAKS FIN). However, OAKS CI will provide integration into OAKS FIN so that contracts and payment requests initiated in OAKS CI can be transmitted to OAKS FIN for processing without reentry of data.

This release also adds three business processes related to the professional services providers on the project. The professional services agreements and professional services amendments business processes provide for the creation, review and approval of agreements and amendments. Information entered in these two business processes is used to set up the professional services pay request, which provides for timely submission and processing of pay requests.

Memo of understanding, SAO billings and sub/supplier declaration are the remaining business processes available in this release. Wave 3 is the third of six releases planned for OAKS CI with full functionality expected at the end of April 2009.

For more information about OAKS CI, go to <http://ci.oaks.ohio.gov> or contact either Steve Mayo at 614.728.4310 or Fred Holcomb at 614.466.0830.

#### **November 5, 2008: Roll-out schedule for remaining OAKS CI business processes announced**

The OAKS Capital Improvements (OAKS CI) team has implemented 21 of their 61 business processes. These business processes are now being piloted in two projects at the State Architect's Office, one project at the Ohio Department of Mental Health and another at Kent State University. Of the 21 processes that have been released, 17 are in use and the other four are available but not currently being used on pilot projects.

The OAKS CI team will release the remaining 40 business processes into the production environment over the next six months. To facilitate testing, configuration and delivery of training, the release has been divided into five waves, each containing eight to 12 business processes. The first of these, Wave 2, includes four new business processes and updates to six existing business processes that were placed into production on Oct. 24. The remaining four waves will be implemented every six to eight weeks, with each wave implementing approximately 10 business processes. Waves will introduce functionality in the chronological sequence of a construction project and broaden the operation of OAKS CI.

Below is a brief description of each wave with key business processes and their anticipated rollout date:

Wave 2 (already in production) supports the acquisition of professional services (Architect/Engineers, construction managers and consultants) through the completion of the selection process. Key business processes include Local Administration Authorization Request, Professional Services Acquisition and Program of Requirements.

Wave 3 will support activities included in the design phase. Key business processes include Professional Services Agreements, Professional Services Amendments and Professional Services Pay Requests. The anticipated rollout date for Wave 3 is Dec. 5.

Wave 4 will support activities included in the contractor acquisition phase. Key business processes include Advertisements, Contractor Acquisition and Contractor Schedule of Values. The anticipated rollout date for Wave 4 is Jan. 30.

Wave 5 will support activities included during the construction phase. Key business processes include Change Orders, Contractor Pay Requests and Escrow Accounts. The anticipated rollout date for Wave 5 is March 27.

Wave 6 will support activities included in the closeout/warranty phase. Key business processes include Punch Lists, Warranties, Contractor Closeout and Professional Services Closeout. The anticipated rollout date for Wave 6 is April 25.

For more information about OAKS CI, go to <http://ci.oaks.ohio.gov> or contact either Steve Mayo at 614.728.4310 or Fred Holcomb at 614.466.0830.

### **September 10, 2008: OAKS CI begins Phase 2 user acceptance test**

The OAKS Capital Improvements (OAKS CI) core team has initiated user acceptance testing of the final 42 business processes collectively known as Phase 2. The core team is conducting testing with some assistance from subject-matter experts who participated in design and the DAS OAKS help desk staff.

Phase 2 user acceptance testing will demonstrate that various common work activities can be successfully conducted using OAKS CI as a tool in the process. Testing looks beyond the OAKS CI application to ensure help files and operating procedures are complete, documents created by OAKS CI are accurate and permissions and security are properly configured.

Phase 2 of OAKS CI will automate many of the financial processes associated with capital improvements projects including acquisition of architects, engineers, construction managers and contractors. It also includes the creation of agreements, amendments, contracts and change orders and processing of payment requests. In addition, Phase 2 provides tracking of project budgets and funding including the ability to track split funding by state universities using local and state money. User acceptance testing for Phase 2 is expected to take three to five months. For more information about OAKS CI, go to <http://ci.oaks.ohio.gov> or contact Fred Holcomb at 614.466.0830.

### **July 9, 2008: OAKS CI team launches two additional pilot projects**

Kent State University and Columbus State Community College are the sites of the two most recent OAKS Capital Improvements (OAKS CI) pilots.

The project team for the library emergency stone repairs project at Kent State University will be using the project communication business processes to facilitate and track communications between the Kent State project representatives, the project's architect and the contractor. This pilot project is expected to be completed this summer and will provide useful feedback on the benefits and usability of the OAKS CI application, support and training.

The project team for the Delaware Hall renovation project at Columbus State Community College also will utilize the OAKS CI project communication business processes. This project is led by SAO Deputy State Architect Ned Thiell and involves a project manager, project coordinator, an architect and five contractors.

The project communication business processes consist of action items, meeting minutes, schedule updates, submittals, transmittals, field reports and requests for interpretation. In addition, the project teams will make use of the OAKS CI document manager to share documents and the OAKS CI "uMail" facility, which attaches electronic mail exchanged within the project team to the project records. Collectively these processes document much of the day-to-day, non-fiscal related communication between contractors, the architect/engineer and the contracting authority. Automated workflow guides the process and documents the results in the project record. OAKS CI provides useful search and reporting capabilities to facilitate timely retrieval of information.

The addition of these two pilots brings the total number of OAKS CI pilot projects to four involving nearly 50 end users. OAKS CI will continue to add additional pilots of the design review and project communication business processes in the near future.

For more information about OAKS CI, go to <http://ci.oaks.ohio.gov> or contact Fred Holcomb at 614.466.0830.

### **June 13, 2008: OAKS CI team launches design review pilots**

The OAKS Capital Improvements (OAKS CI) team is pleased to announce that two pilots of the design review business process have been launched representing the first projects to go live in the OAKS CI production environment. The Ohio Department of Transportation Clinton County maintenance facility project became the first project to go live in early April. Ten project team members attended a half-day training session prior to the project kick-off. The expected completion date of this pilot project, administered by the State Architect's Office, is early summer. SAO Project Manager Bruce Ratekin said, "I am pleased to be one of the first users of OAKS CI. The ability to distribute, share and organize files electronically will be of great benefit to our project."

The Ohio Department of Mental Health initiated the second design review pilot on an HVAC system improvement project at their Athens facility. This locally administered project, led by Robin Cox from the Ohio Department of Mental Health, also is expected to be completed this summer.

The design review business process provides for electronic submission, review and approval of the program verification, schematic design, design development and construction documents. Using this process, the Architect/Engineer submits drawings and specifications electronically. The project manager coordinates review of the submittal using a "discussion group." Automated workflow guides the process and documents the results in the project record.

OAKS CI will continue to add additional pilot projects to test the design review and project communication business processes. For more information about OAKS CI, go to <http://ci.oaks.ohio.gov>.

**April 1, 2008: RFQ notifications update**

In November 2007, the OAKS Capital Improvements team announced the new request for qualifications (RFQ) process and subscription service to receive e-mail notifications when an RFQ is posted to the site. Over the last few months, the team has noticed several bounced e-mail notifications. Notifications are sent as a bulk e-mail which may be interrupted by your company's spam blocker.

If you signed up for notifications but are not receiving them, please contact your company's IT department for more information to allow these notifications. Also, please continue to check the OAKS Capital Improvements Web site at <http://ci.oaks.ohio.gov> regularly so that you are not missing new RFQs or important updates and/or deadline changes to the RFQs.

**February 15, 2008: SF330 form reminder and update**

Reminder: State agencies or institutions with projects advertised for professional design services on or after March 1 will require firms to respond using the State of Ohio version of the Federal Standard Form 330 (SF330) no later than the response deadline indicated on the announcement.

We've now included more detailed information in the instruction pages of the Microsoft Word version of the SF330 form that pertains to State of Ohio projects only. Please pay close attention to these instructions since they are somewhat different from the federal version. Note: The Microsoft Word version of the SF330 form is intended to be a totally flexible document to allow for photos, charts and varying lengths of text. It is not intended to resemble the PDF version of the federal form. We hope to have a "fillable" PDF version of the State of Ohio form available on our Web site soon.

Professional design firms are required to provide a copy of Part II of the SF330 form to be considered for state work. Part II of the SF330 should be submitted directly to the State Architect's Office, 4200 Surface Road, Columbus, Ohio 43228-1395, no later than Oct. 1, 2008. Firms who have previously submitted an ADM-0254 form within the past year do not need to update their qualifications until Oct. 1.

To access the State of Ohio version of the SF330 form online, go to the SAO Web site at <http://www.ohio.gov/sao> and click on "Forms/Documents."

The OAKS Capital Improvements (CI) team is proud to announce its new Web site located at <http://ci.oaks.ohio.gov>. Please visit this Web site to obtain news about the CI project, Requests for Qualifications and other valuable information. Information is updated to this site regularly so please check it often.

The CI module, formerly referred to as CIMS, will replace SAO's current software system and is the fifth module of OAKS. OAKS stands for Ohio Administrative Knowledge System, a statewide ERP (Enterprise Resource Planning) application.

This module is a Web-based project management system that will be available to all state agencies and state supported colleges and universities as well as the State Architect's Office. It is estimated that when fully implemented in mid-2008, this system will save the state approximately \$2.4 million annually.

The CI module will house all of the data on each construction project, providing access for members of each project team to drawings, meeting minutes, requests for information and change orders as well as contract documents, payments requests and EDGE information. Documents will process through the system for approval via electronic workflow, which will allow the members of the project team to track the status of each document.

**February 15, 2008: OAKS CI completes phase one user acceptance test**

The OAKS Capital Improvements (OAKS CI) team is pleased to announce the successful completion of the Phase 1 user acceptance test. At this time, all critical defects have been addressed by Skire, Inc., the contractor for the project. As a result the OAKS CI team and the application is ready to deploy.

Phase 1 provides four functional components that do not require integration into the OAKS financial module or involve the cost or funding tables. These four components are project initiation, design review, project communication and evaluations.

The "project initiation" business processes consist of the local administration authorization request, the request for qualifications and the bid planning calendar. These business processes provide for electronic routing of documents while fully adhering to the existing work processes. Automated workflow guides the process and documents the results in the project record.

The "design review" business processes provide for electronic submission, review and approval of program verification, schematic design, design development and construction documents. Using this process, the architect/engineer (A/E) submits drawings and specifications electronically. The project manager coordinates review of the submittal using a "discussion group." Automated workflow guides the process and documents the results in the project record.

The "project communication" business processes consist of action items, meeting minutes, schedule updates, submittals, transmittals, field reports and requests for interpretation. Collectively these processes document much of the day-to-day, non-fiscal related communication between contractors, the A/E and the contracting authority. In addition, automated workflow guides the process and documents the results in the project record. OAKS CI provides useful search and reporting capabilities to facilitate timely retrieval of this data.

The "evaluation" business processes consist of the contractor evaluation and the A/E evaluation. These business processes provide an electronic version of the existing SAO evaluation forms, which are supported by automated workflow to guide the process and document the results in the project record. Reports provide the ability to retrieve data for a given vendor from across all projects maintained in the system.

The OAKS CI team will pilot these four functional components on a limited basis prior to general implementation. The OAKS CI team will begin initiating pilot implementation activities shortly.

### **January 11, 2008: OAKS Capital Improvements Update**

OAKS Capital Improvements (CI) will begin rolling out Phase 1 functionality starting in early February. Phase 1 is comprised of 21 business processes that are grouped into four functional components: project initiation, design services review and acceptance, project communication and vendor evaluations.

Project initiation is the first component scheduled for roll out. This component includes local administration requests, the RFQ process and bid planning. The local administration request will initially roll out to those state agencies involved in construction that are required by statute to request approval to administer their projects. Colleges and universities will follow at a later date. Training for the staff involved will take place prior to roll out. At about the same time, project communication, which includes action items, meeting minutes, schedule updates, submittals, transmittals, field reports and requests for interpretation, as well as vendor evaluations will be implemented on a few projects managed by individuals who have served as subject matter experts (SMEs) on the OAKS CI project and are therefore already familiar with the software.

Since SMEs will be involved at this time, the training and support requirements for these two functional components will be manageable; however, training for the project teams involved will take place prior to rollout for each component. Design review and acceptance will be rolled out after project communications and vendor evaluations in much the same manner. Each of these functional components will be evaluated along with their associated help files. Training and further roll-out will take place first within the OAKS CI partner universities and agencies, and then to other agencies and colleges and universities after they been trained and determined to be ready.

The OAKS CI project team believes that the incremental roll-out described above will allow for an orderly implementation that will allow fine tuning of the software, the training and the help files associated with each business process.

The OAKS CI Web-based project management system will be available to all state agencies and state-supported colleges and universities as well as SAO. It is estimated that, when fully implemented in mid-2008, this system will save the state approximately \$2.4 million annually. For more information about OAKS CI, contact SAO Fiscal Officer Fred Holcomb at 614.466.0830 or [fred.holcomb@das.state.oh.us](mailto:fred.holcomb@das.state.oh.us).

### **January 11, 2008: State to require SF330 form in March**

Beginning March 1, 2008, firms responding to all State of Ohio Requests for Qualifications must submit the Federal Standard Form 330 (SF330) no later than the response deadline indicated on the announcement.

The SF330 form, used to obtain information from architect-engineer firms about their professional qualifications, will officially replace both the ADM-0255 and ADM-0254 form. After March 1, the ADM-0255 and ADM-0254 forms will no longer be accepted.

SAO requests that supplemental material not be submitted with the SF330 form. The use of a computerized or SF330 form is preferred. Facsimile copies will not be accepted. Please place the appropriate project number in the space provided on the form. Due to limited storage space, we request that your submittals be stapled and refrain from submitting three-ring binders, spiral binders and booklets.

To access the Ohio version of the SF330 form online, go to the SAO Web site at <http://www.ohio.gov/sao> (click on "Forms/Documents").

#### **December 12, 2007: OAKS Capital Improvements Web site reminders**

In November, the OAKS Capital Improvements (CI) team began posting Requests for Qualifications (RFQs) to the OAKS CI Web site at <http://ci.oaks.ohio.gov>. Previously, the RFQs were posted on the SAO Web site in a document called the Ohio Register. The RFQs posted to this site include RFQs for projects administered by the State Architect's Office and locally administered projects. These RFQs are posted to the site on an ongoing basis throughout the month.

In addition, SAO moved the construction bid information to the OAKS Capital Improvements Web site under a page titled "Public Bid Advertisements." Currently, this page lists SAO-administered projects only. To view construction bid information for other agencies or higher education institutions, go to the construction bid database site at <http://apps.das.ohio.gov/ConstructionBids/construction.asp>.

OAKS CI will replace SAO's current software system and is the fifth module of OAKS. OAKS stands for Ohio Administrative Knowledge System, a statewide Enterprise Resource Planning application. When fully implemented, the CI module will house all of the data on each construction project, providing access for members of each project team to drawings, meeting minutes, requests for information and change orders as well as contract documents, payments requests and EDGE information. Documents will process through the system for approval via electronic workflow, which will allow the members of the project team to track the status of each document.

#### **December 12, 2007: OAKS Capital Improvements e-mail notifications**

Those wishing to subscribe to receive e-mail notifications when a Request for Qualification (RFQ) and/or SAO construction bid is posted to the OAKS Capital Improvements site may do so by going to the OAKS Capital Improvements Web site at <http://ci.oaks.ohio.gov> and clicking on "Register for RFQ Notifications" and/or "Register for Construction Bid Notifications."

Subscribing to these lists is voluntary and users may unsubscribe at any time. Please note: Notifications are sent as a "bulk e-mail" which may be interrupted by your company's spam blocker. If you signed up for notifications but are not receiving them, please contact your company's IT department for more information. Also, a few subscribers are having difficulty accessing the link to the OAKS Capital Improvements Web site from their e-mail notification message. These folks may need to copy and paste the address into their Web browser or bookmark the site. We apologize for this inconvenience and are researching ways to ensure the notifications work efficiently for everyone.

#### **December 12, 2007: December RFQs and Ohio Register archive**

At the end of each month, all RFQs that are published during that month are compiled into one "Ohio Register" document using the next issue number. For example, all RFQs published in December 2007 will be archived after the last day of December as "Ohio Register #172." RFQs will continue to be accessible individually on the "Current RFQs" page of the OAKS Capital Improvements Web site at <http://ci.oaks.ohio.gov> until the response deadline. The archived Ohio Register documents also are available via this site under the title of "Archived RFQs." For more information or questions about this process, please contact Angie Carder at 614.752.0448 or at [angie.carder@das.state.oh.us](mailto:angie.carder@das.state.oh.us).

#### **November 1, 2007: New RFQ Process Begins**

SAO has begun publishing Requests for Qualifications (RFQs) on an individual, ongoing basis, with varying deadlines for submissions rather than just once a month as we had done previously. Agencies and institutions of higher education will publish RFQs as-needed using their own project-specific deadline for responses.

RFQs are now posted to the OAKS Capital Improvements (CI) Web site at <http://ci.oaks.ohio.gov>. RFQs are listed in the order of when responses are due. At the end of each month, RFQs will be compiled into an "Ohio Register" document using the next issue number. For example, all RFQs published in November 2007 will be archived as "Ohio Register #171." The archived RFQs are accessible from the above Web site. In addition, the short list report is now published on this site.

Those wishing to subscribe to receive e-mail notifications of when an RFQ is posted to the site may do so by clicking the "Register for RFQ Notifications" link on the RFQ Web page or from the CI home page. Please note: Subscribing to this list is voluntary and you may unsubscribe at any time.

#### **November 6, 2007: Construction bid notifications now available**

The State Architect's Office now offers electronic e-mail notifications about new construction bids and addenda for SAO-administered projects. All construction bidding information for the State Architect's Office is now posted to the new OAKS Capital Improvements (CI) Web site at <http://ci.oaks.ohio.gov>.

To sign up for notifications, go to the CI Web site and click on "Register for Construction Bid Notifications" and enter your first name, last name and e-mail address. Once a bid has been added or updated on the site, you will be sent an e-mail notification. Subscribing to this list is voluntary and you may unsubscribe at any time. Please note: This notification process will eventually be replaced by a better system through the new CI module sometime in 2008. At that time, you may need to re-enter your data.

#### **October 9, 2007: New RFQ process begins in November**

Beginning in November, the Ohio Register will no longer be a monthly publication. Instead, Requests for Qualifications (RFQs) will be published on an individual, ongoing basis, with varying deadlines for submissions. Interested parties will still access the Ohio Register online from the SAO Web site at [www.ohio.gov/sao](http://www.ohio.gov/sao) (then click on "Ohio Register").

This change to the RFQ process is a precursor to additional enhancements that will be made as a result of the new Capital Improvements Management System (CIMS). CIMS is a Web-based project management system that will be available to all state agencies and state-supported colleges and universities as well as SAO. It is estimated that, when fully implemented in mid-2008, this system will save the state approximately \$2.4 million annually.

For more information about the Ohio Register and the new RFQ process, please contact Ohio Register Editor Angie Carder at 614.752.0448 or e-mail her at [angie.carder@das.state.oh.us](mailto:angie.carder@das.state.oh.us).

#### **August 9, 2007: CIMS update**

The first Capital Improvements Module System (CIMS) Business Owners Advisory Group (BOAG) meeting was held July 31. This group is comprised of representatives from each of the partner agencies and stake holders and serves as an advisory group to CIMS and the Ohio Department of Administrative Services. Discussions centered on CIMS roll-out planning, support planning, change management and security. BOAG members will meet every four to eight weeks as determined by the group.

CIMS is a Web-based project management system that will be available to all state agencies and state supported colleges and universities as well as SAO. It is estimated that, when fully implemented in mid-2008, this system will save the state approximately \$2.4 million annually. For more information about CIMS, contact SAO Fiscal Officer Fred Holcomb at 614.466.0830 or [fred.holcomb@das.state.oh.us](mailto:fred.holcomb@das.state.oh.us).

#### **July 6, 2007: CIMS update**

Core team members and subject matter experts for the Capital Improvements Management System (CIMS) received three days of training by representatives from Skire, Inc. on their Unifer™ software the week of June 11. In addition, Skire representatives, core team members and subject matter experts participated in sessions the week of June 25 to confirm design documents of the business processes that have been completed to date.

Requirements affirmation sessions will take place this month. The CIMS team will discuss a new group of business processes in each of these sessions which will result in design documents for the team to review and approve.

CIMS is a Web-based project management system that will be available to all state agencies and state supported colleges and universities as well as SAO. It is estimated that, when fully implemented in mid-2008, this system will save the state approximately \$2.4 million annually. For more information about CIMS, contact SAO Fiscal Officer Fred Holcomb at 614.466.0830 or [fred.holcomb@das.state.oh.us](mailto:fred.holcomb@das.state.oh.us).

**June 12, 2007: CIMS update**

Requirements affirmation sessions for the Capital Improvements Management System (CIMS) continue to be held with members from Skire, Inc., core team members and subject matter experts. Sessions also are being held to confirm the design documents of business processes that Skire has completed. It has been determined that CIMS will be delivered in two phases. A final decision has not yet been made as to which business processes will be delivered in the first phase.

Members of the Skire project team will provide hands-on training to core team members and subject matter experts on the Unifer software during the week of June 11.

**May 4, 2007: CIMS update**

The Capital Improvements Management System (CIMS) project team began kick-off meetings last month with Skire, Inc., the contractor for the project. State agency and state-supported college/university partners for the project also were in attendance. During these sessions the CIMS project team presented their vision of the project and Skire provided a short demonstration of the current version of their Unifier construction management software to the team. This was followed by high level discussions of the as-is state of current systems and processes, discussing related key functionality and features and beginning planning tasks for the project.

Requirements affirmation sessions will begin this month and will include core team members and subject matter experts from the state agencies and state-supported colleges/universities that are partners with SAO for the project.

Any state agency or state-supported college/university representative interested in being involved with the CIMS project may contact SAO Fiscal Officer Fred Holcomb at 614.466.0830 or [fred.holcomb@das.state.oh.us](mailto:fred.holcomb@das.state.oh.us).

**April 9, 2007: State of Ohio Selects Skire for Statewide Enterprise Agreement**

Skire Selected as Strategic Technology Provider for Software to be Utilized by All State Agencies

MENLO PARK, CA, April 9, 2007 – Skire, Inc. ([www.skire.com](http://www.skire.com)), the leading provider of capital program, integrated workplace, and project portfolio management software, today announced an enterprise agreement with the State of Ohio. The agreement provides the state with a license for widespread usage of Skire's flagship Unifier™ product across all state-funded and state-administered agencies, including schools and universities. It is the third, and largest, agreement that Skire has signed with a state government recently.

Skire Unifier delivers a standards-based platform that will integrate with the State of Ohio's existing PeopleSoft ERP system and provide all state agencies with advanced tracking, recording, monitoring, and management capabilities using a Web-based interface. State colleges and universities will also benefit from their ability to access Unifier applications.

"We are delighted that the State of Ohio has chosen the Skire platform and we are looking forward to a close working relationship that will enable the state to meet or exceed its objectives," said Massy Mehdipour, Skire's chief executive officer. "It is exciting to work with a team that can envision and execute a huge leap forward in improving capital program efficiency. The State of Ohio represents an extraordinary example of leadership and we are proud to work with the state's team moving forward."

The State of Ohio's decision to implement Unifier was based on numerous criteria, including Skire's extensive customer list that includes many blue-chip corporate customers; federal, state, and local government agencies; and leading educational institutions.

"An agreement of this magnitude is the result of many years of hard work and dedication by the Skire team, and reflects our ability to consistently deliver the most innovative, flexible and intuitive solutions in the marketplace, combined with a strong focus on service delivery and implementation success," said Mehdipour.

Skire Unifier is a powerful business process automation platform for managing programs, projects, resources, and assets. The platform centralizes comprehensive management capabilities and makes them available to everyone who needs them through a standard Web browser. With robust cost management and project controls capabilities, Skire's Unifier delivers the best combination of pre-defined workflows, best practices, ease-of-use, and adaptability.

**About Skire**

Skire, Inc. is the leading provider of capital program, integrated workplace, and project portfolio management software. The company's flagship Unifier platform leverages the company's deep industry experience, giving customers unprecedented visibility and control over major programs and projects. Skire's solutions are used by global Fortune 1000 companies,

government agencies, and educational institutions for managing billions of dollars in capital programs, real estate, and IT portfolios. The company is privately held and headquartered in Menlo Park, California. For more information, visit <http://www.skire.com>.

#### **April 2, 2007: CIMS update**

The Capital Improvements Management System (CIMS) project team continues to meet with potential state agency and state-supported college/university partners to assist with the implementation of CIMS. Most recently the team held meetings with representatives of the Ohio Department of Natural Resources and Ohio Department of Mental Retardation and Developmental Disabilities to assist with the implementation of CIMS. Presentations with other potential partners will be held in the near future.

The contractor for the project, Skire, Inc., will be here the week of April 9 to meet with project core team members to begin planning the tasks for the project. Requirements affirmation sessions will begin in May and will include core team members and subject matter experts from state agencies and state-supported colleges/universities that have partnered with SAO for the project.

Any state agency or state-supported college/university representative interested in being involved with the CIMS project may contact SAO Fiscal Officer Fred Holcomb at 614.466.0830 or [fred.holcomb@das.state.oh.us](mailto:fred.holcomb@das.state.oh.us).

#### **March 5, 2007: Capital Improvements Management System update**

The State of Ohio Office of Information Technology has awarded a contract on behalf of the State Architect's Office for a Capital Improvements Management System (CIMS), which will replace SAO's current software system and interface with OAKS (Ohio Administrative Knowledge System). The state awarded the CIMS contract to Skire, Inc. on Feb. 23 after releasing an RFP (Request for Proposal) in September 2006.

CIMS is a Web-based project management system that will be available to all state agencies and state supported colleges and universities as well as SAO. It is estimated that, when implemented in mid-2008, this system will save the state approximately \$2.4 million annually. The CIMS project team is meeting with potential state agency and state college or university partners to assist with the implementation of CIMS. They met with representatives from The Ohio State University last week and plan to meet with the representatives from the Ohio Department of Mental Health this week. SAO is planning meetings with other potential partners in the near future. Any state agency or state college/university representative interested in being involved with the CIMS project is asked to contact SAO Fiscal Officer Fred Holcomb at 614.466.0830 or [fred.holcomb@das.state.oh.us](mailto:fred.holcomb@das.state.oh.us).

#### **November 1, 2006: OAKS releases RFP for capital improvements project**

An RFP (Request for Proposal) for the acquisition of a construction management system for the Capital Improvements Management System (CIMS) project was released on Sept. 21 by the Ohio Office of Information Technology Acquisition Management Office on behalf of the State Architect's Office. This system will replace SAO's current software system and will be interfaced with OAKS (Ohio Administrative Knowledge System).

OAKS is a statewide system that will replace the state's current accounting system, human resources system, procurement system and fixed asset system as well as the capital improvements system via the interface with CIMS. When completed, CIMS will be available to all state agencies as well as all state-funded colleges and universities.

CIMS will house all of the data on each construction project, providing access for members of each project team to drawings, meeting minutes, requests for information and change orders as well as contract documents, payments requests, EDGE information and other related documents. Documents will process through the system for approval via workflow, which will allow the members of the project team to track the status of each document.

Stay tuned to "SAO eNews" for additional information about the CIMS project and its release date. For more information about OAKS, go to <http://oaks.ohio.gov/>.

The project team for the library emergency stone repairs project at Kent State University will be using the project communication business processes to facilitate and track communications between the Kent State project representatives, the project's architect and the contractor. This pilot project is expected to be completed this summer and will provide useful feedback on the benefits and usability of the OAKS CI application, support and training.

The project team for the Delaware Hall renovation project at Columbus State Community College also will utilize the OAKS CI project communication business processes. This project is led by SAO Deputy State Architect Ned Thiell and involves a project manager, project coordinator, an architect and five contractors.

The project communication business processes consist of action items, meeting minutes, schedule updates, submittals, transmittals, field reports and requests for interpretation. In addition, the project teams will make use of the OAKS CI document manager to share documents and the OAKS CI "uMail" facility, which attaches electronic mail exchanged within the project team to the project records. Collectively these processes document much of the day-to-day, non-fiscal related communication between contractors, the architect/engineer and the contracting authority. Automated workflow guides the process and documents the results in the project record. OAKS CI provides useful search and reporting capabilities to facilitate timely retrieval of information.

The addition of these two pilots brings the total number of OAKS CI pilot projects to four involving nearly 50 end users. OAKS CI will continue to add additional pilots of the design review and project communication business processes in the near future.

**END**