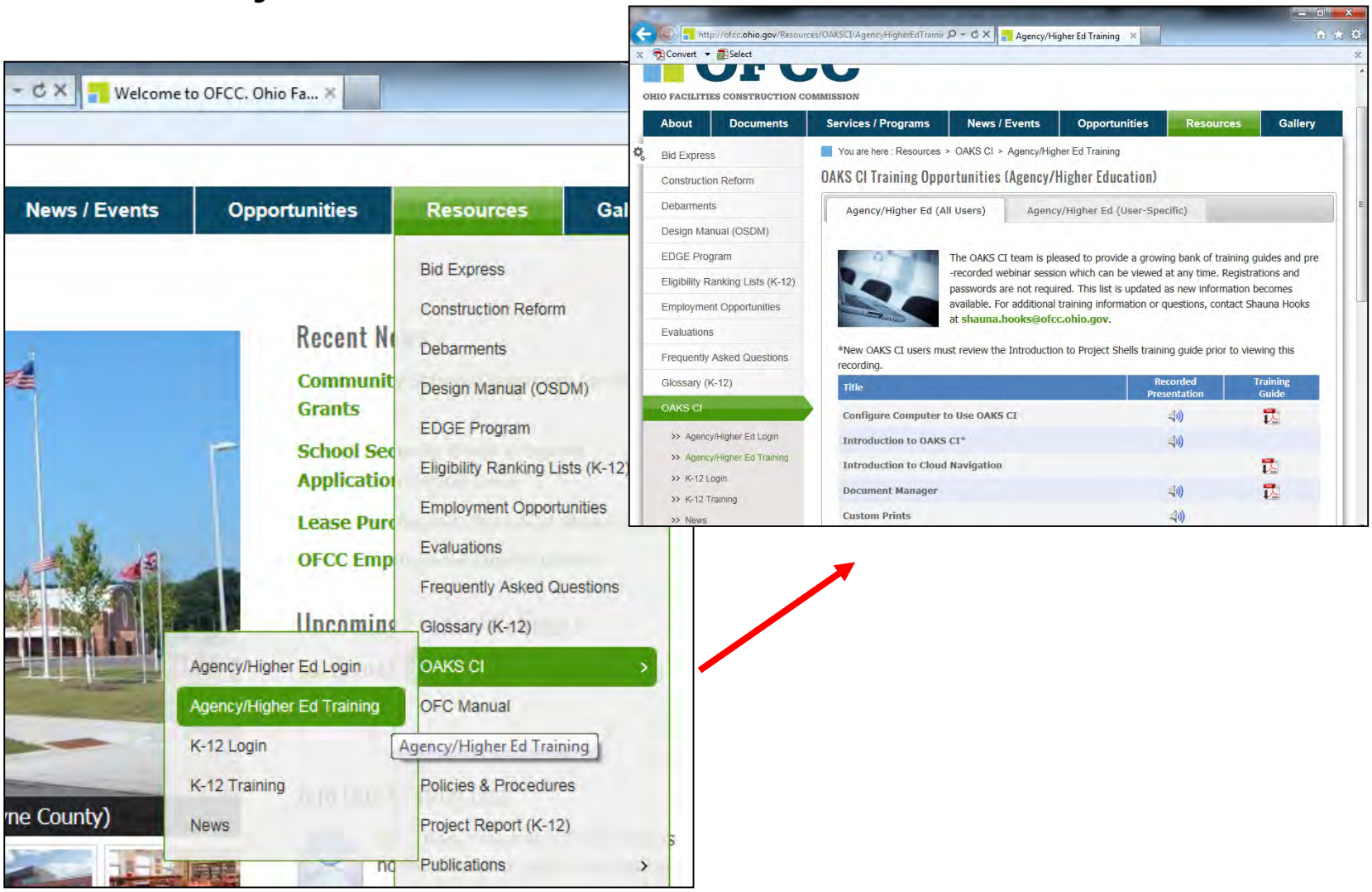
OAKS
Capital Improvements

Introduction to OAKS CI

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

Job Aids

- For additional reference materials visit our website ofcc.ohio.gov
  - Click: Resources -> OAKS CI -> Choose Higher Ed or K-12 Training-> Choose Job Aid



Using OAKS CI in the Cloud

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

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

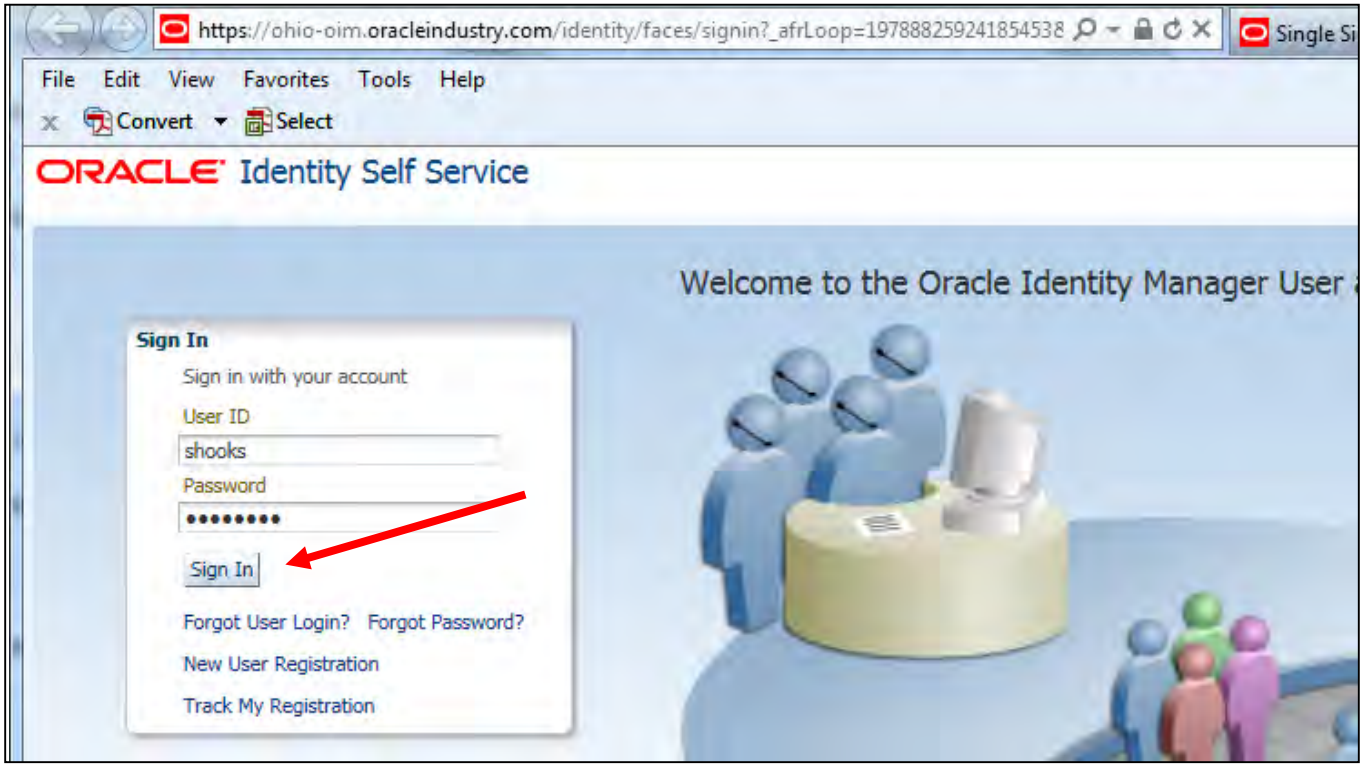
Agenda

In the following presentation we will discuss:

- Using OIM to manage your OAKS CI password (Pages 5-6)
- Navigating OAKS CI (Page 7-18)
  - Navigating to Your Project (7-11)
  - Collaboration: Tasks, Messages, Drafts (12-17)
  - Logs: Business Processes (18)
- Records (19)
- Document Manager (33)

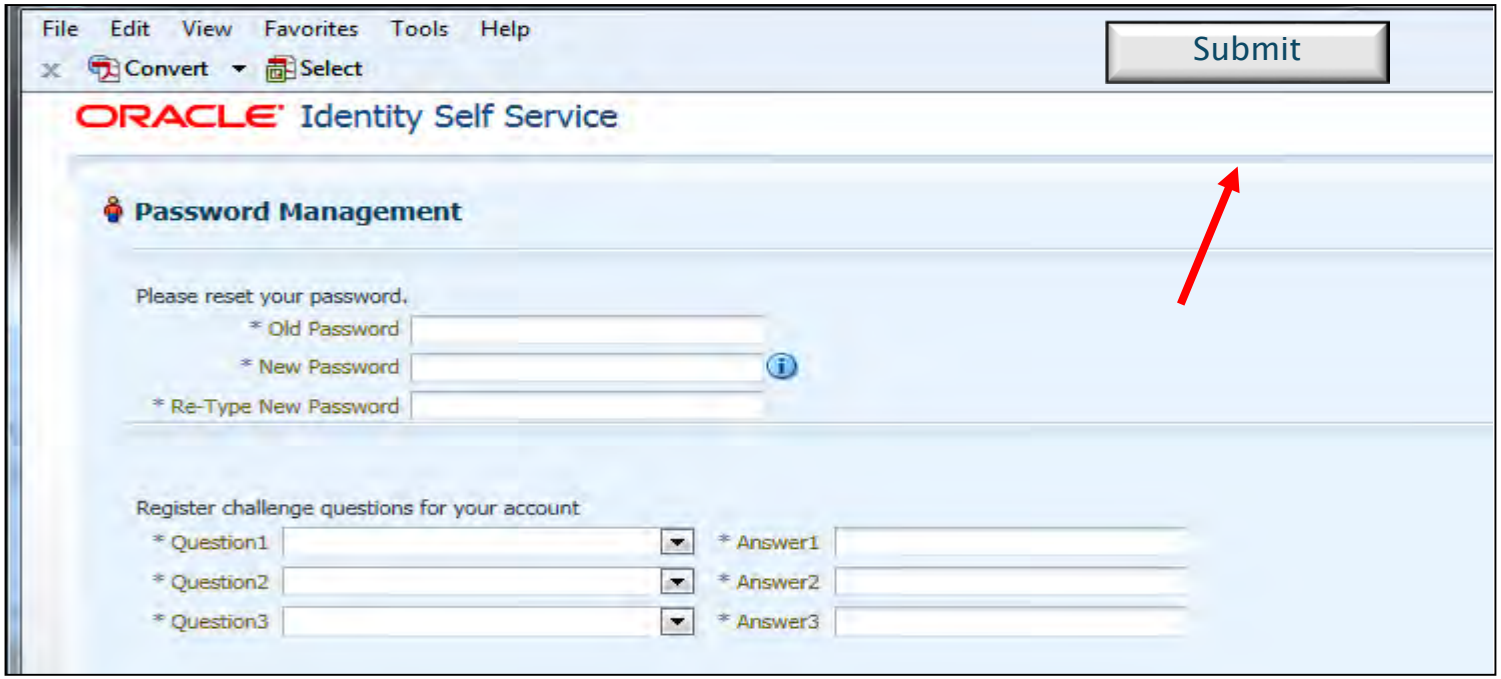
Oracle Identity Manager (OIM)

- To reset your password or to set your security questions, login to the OIM website: https://ohio-oim.oracleindustry.com/oim
- Type in your Username and Password. This is the same as the login information you use for accessing OAKS CI.
- Click “Sign In”



Oracle Identity Manager (OIM)

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



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

Navigating OAKS CI in the Cloud

Navigate to OAKS CI

- Open any web browser

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

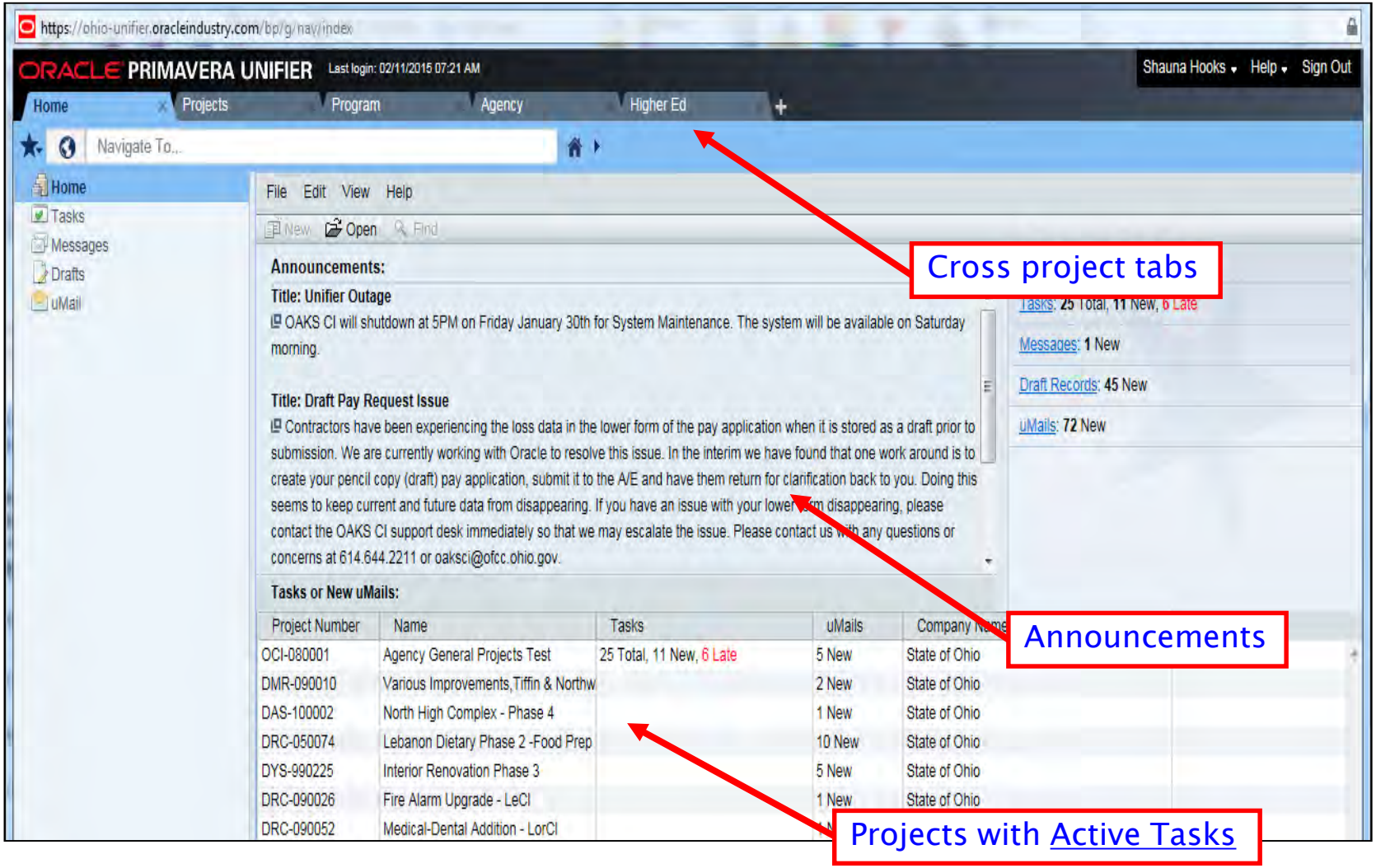
- Navigate to: https://ohio-unifier.oracleindustry.com

- Enter your assigned Username and Password

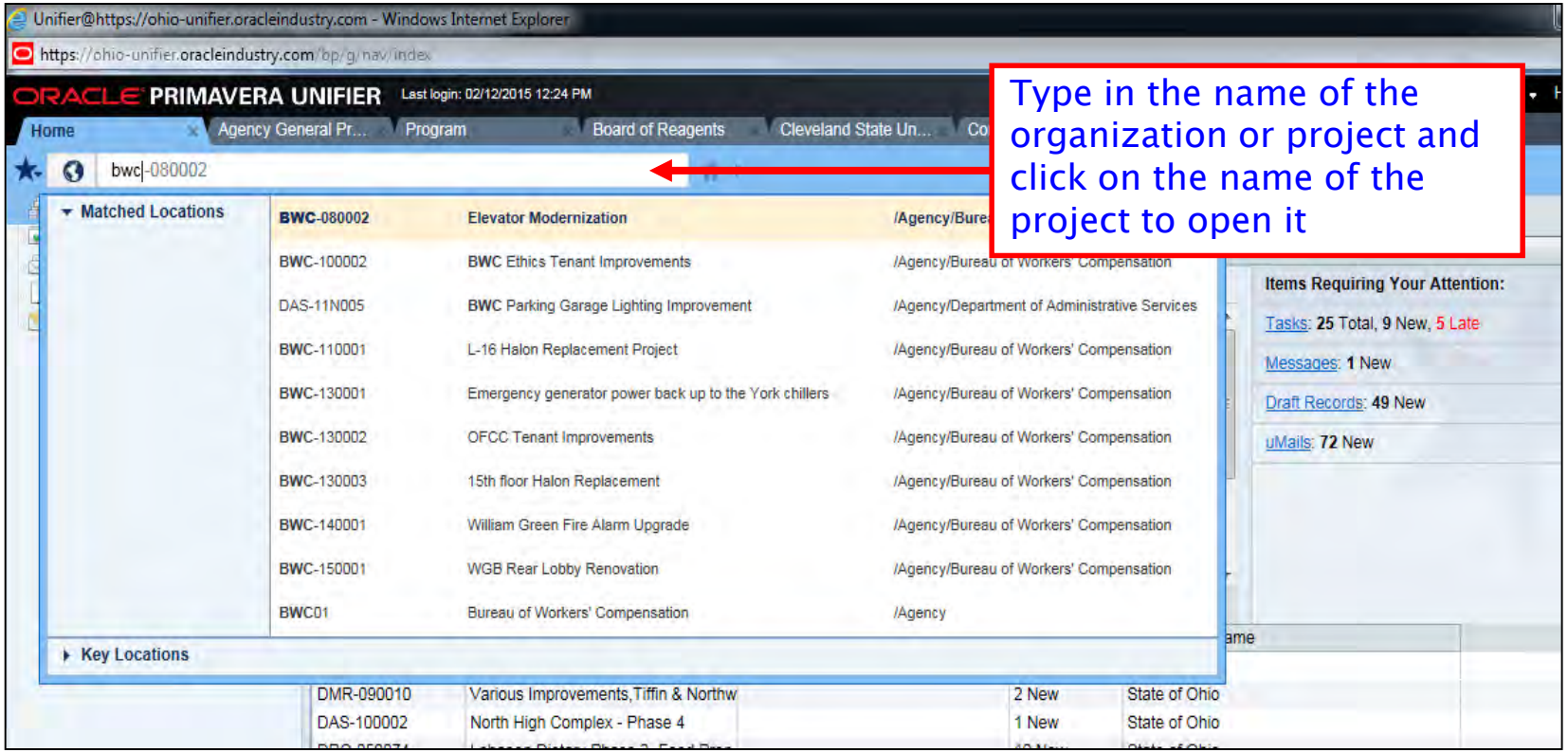
- Click "Login"

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

Cross Project Home Page



Locating your Organization or Project



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

Project Home Page

Unifier@https://ohio-unifier.oracleindustry.com - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/g/nav/index

ORACLE PRIMAVERA UNIFIER Last login: 07/22/2015 11:21 AM

Proxy for Kayli

Company Workspace | Lock-Door Upgrade

Navigate To... | Agency | Department of... | Lock-Door Up...

Lock-Door Upgrade - Home

- Alerts
- uMail
- Collaboration
- Information
- Cost Manager
- Data Manager
- Document Manager
- Logs
- Reports

File Edit View Help

Lock-Door Upgrade - Home

Summary

Image

Details

Project Number:	DRC-16L006
Project Name:	Lock-Door Upgrade
Description:	This project will replace the locking system in the segr housing unit (ranges C, D, E, and F) approx. 72 cell fro doors at Chillicothe Correctional Institution.
Administrator:	Moenique Morris
Currency:	United States Dollar (USD)
Status:	Active
Email Address:	2105-test@oracle.com

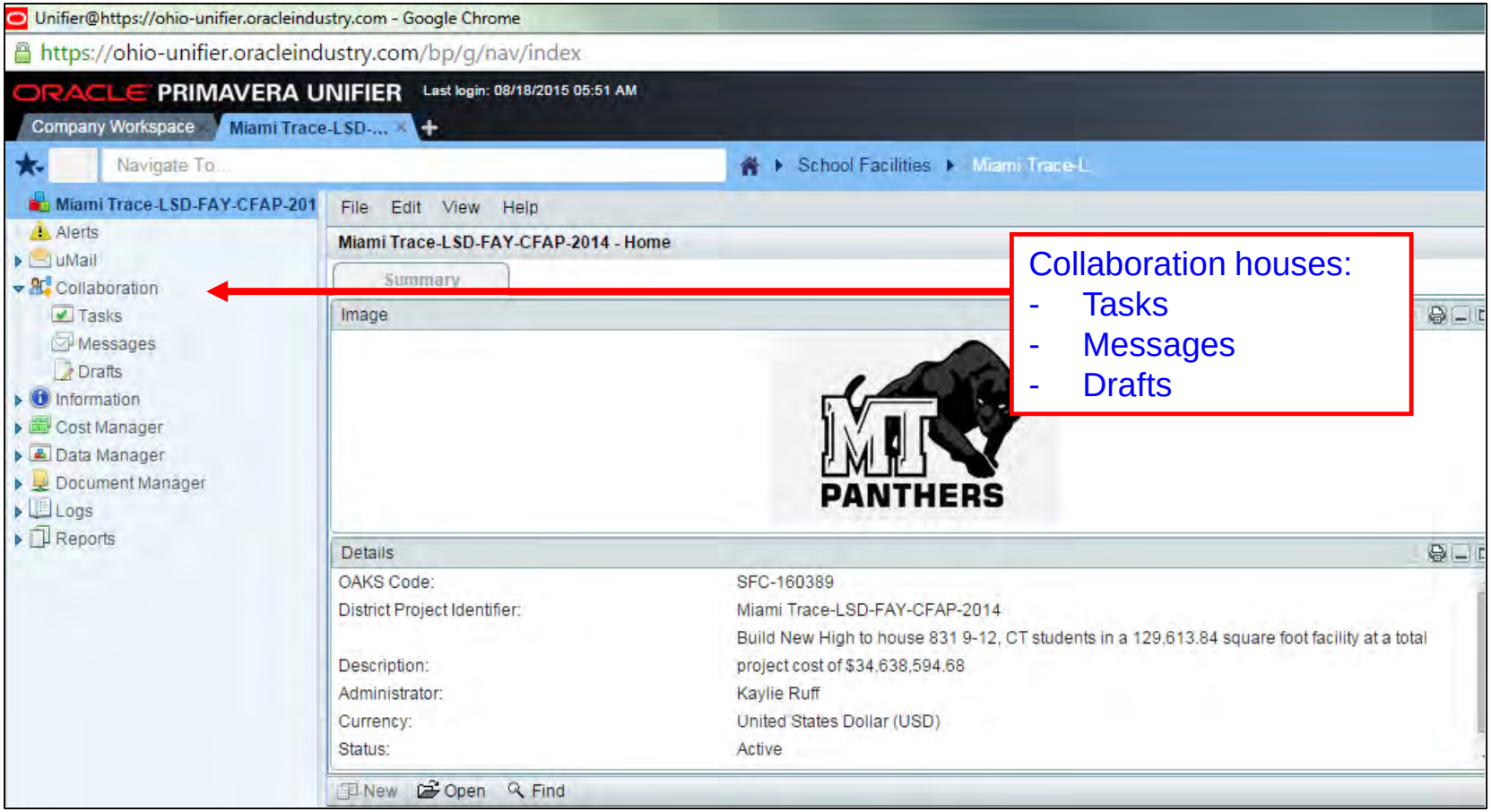
Most work is completed in 3 areas:

Collaboration– Your Work

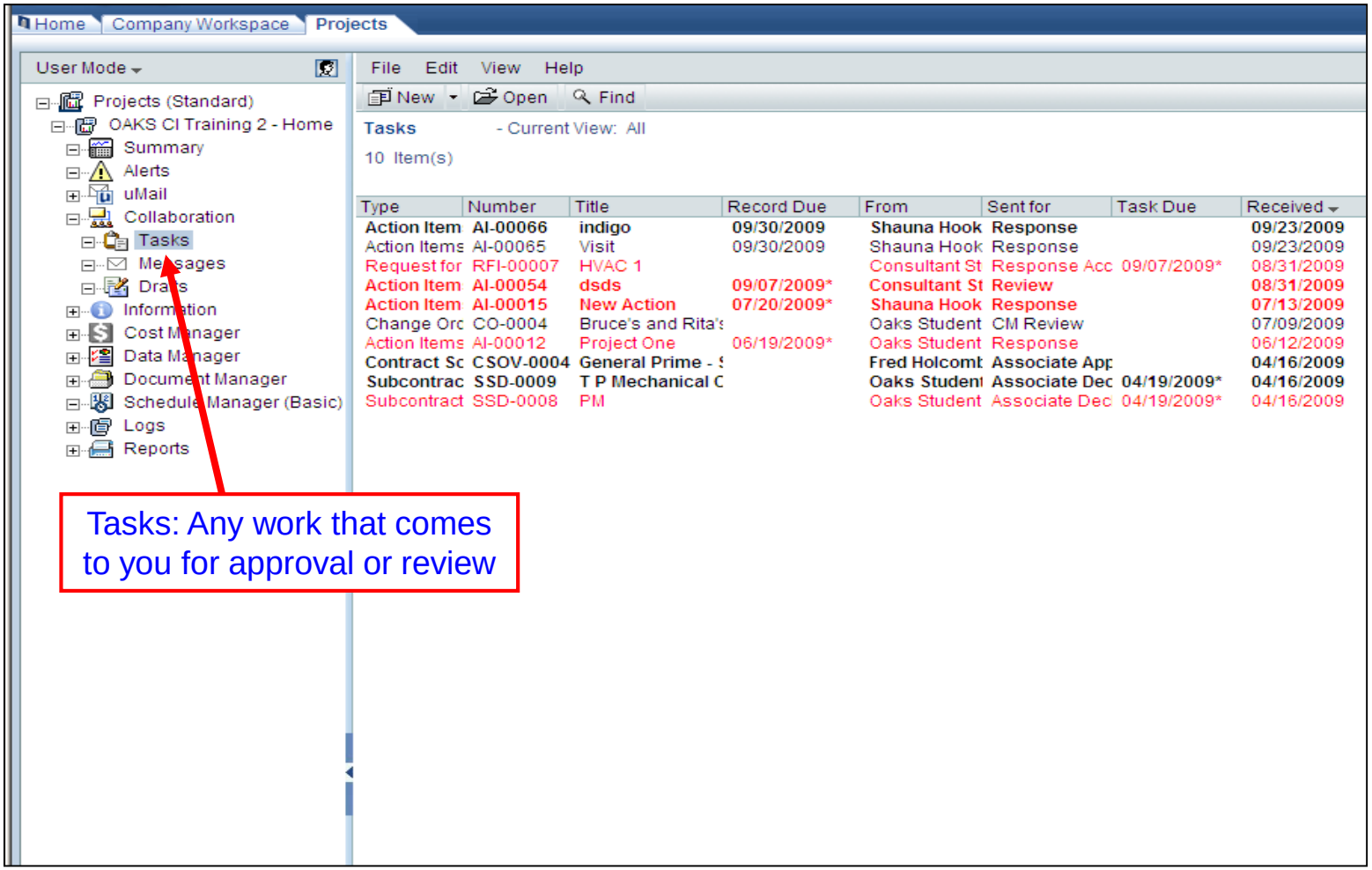
Document Manager– Your supporting documentation

Logs– Where records are housed and created

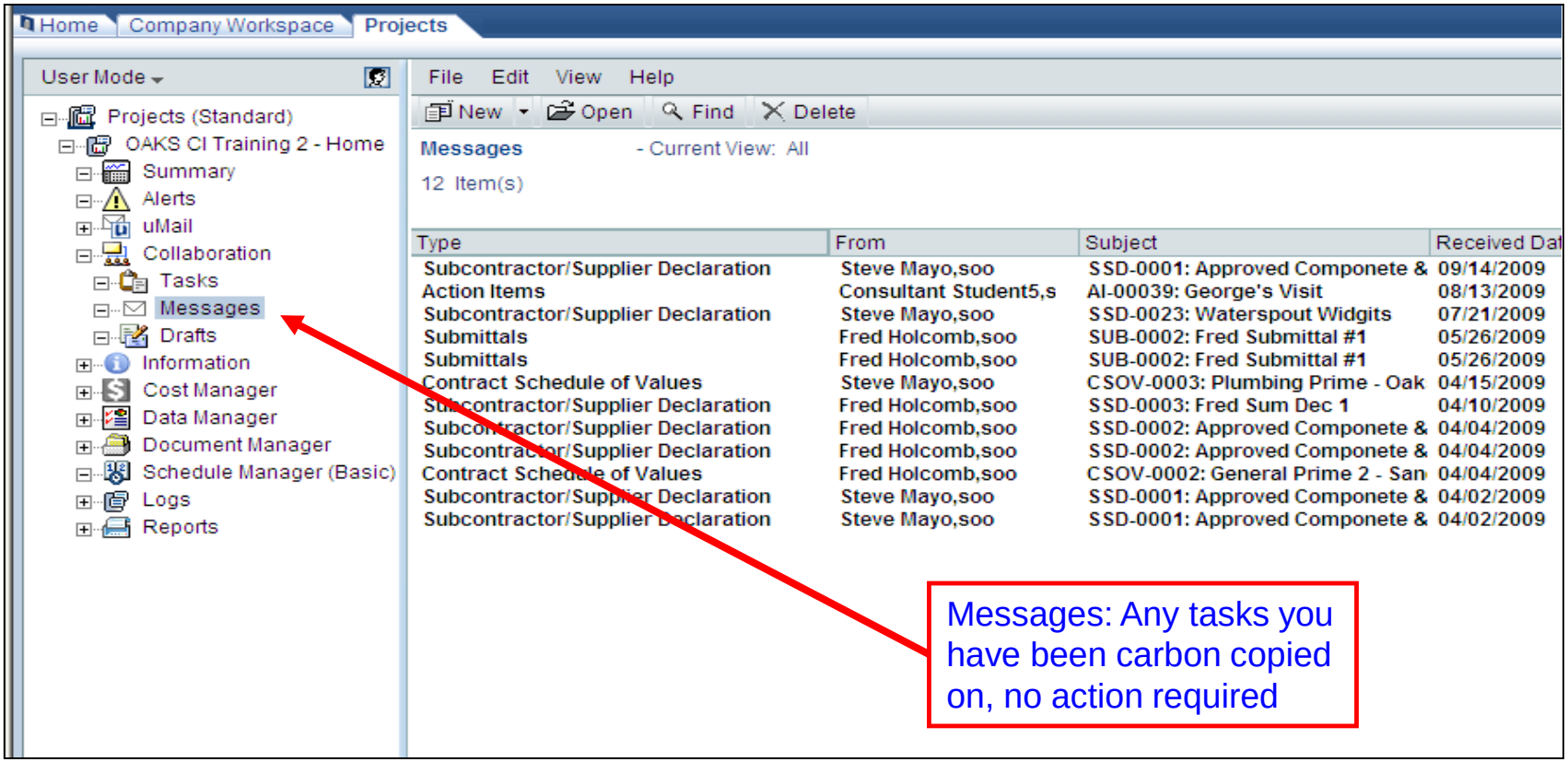
Collaboration– All About You!



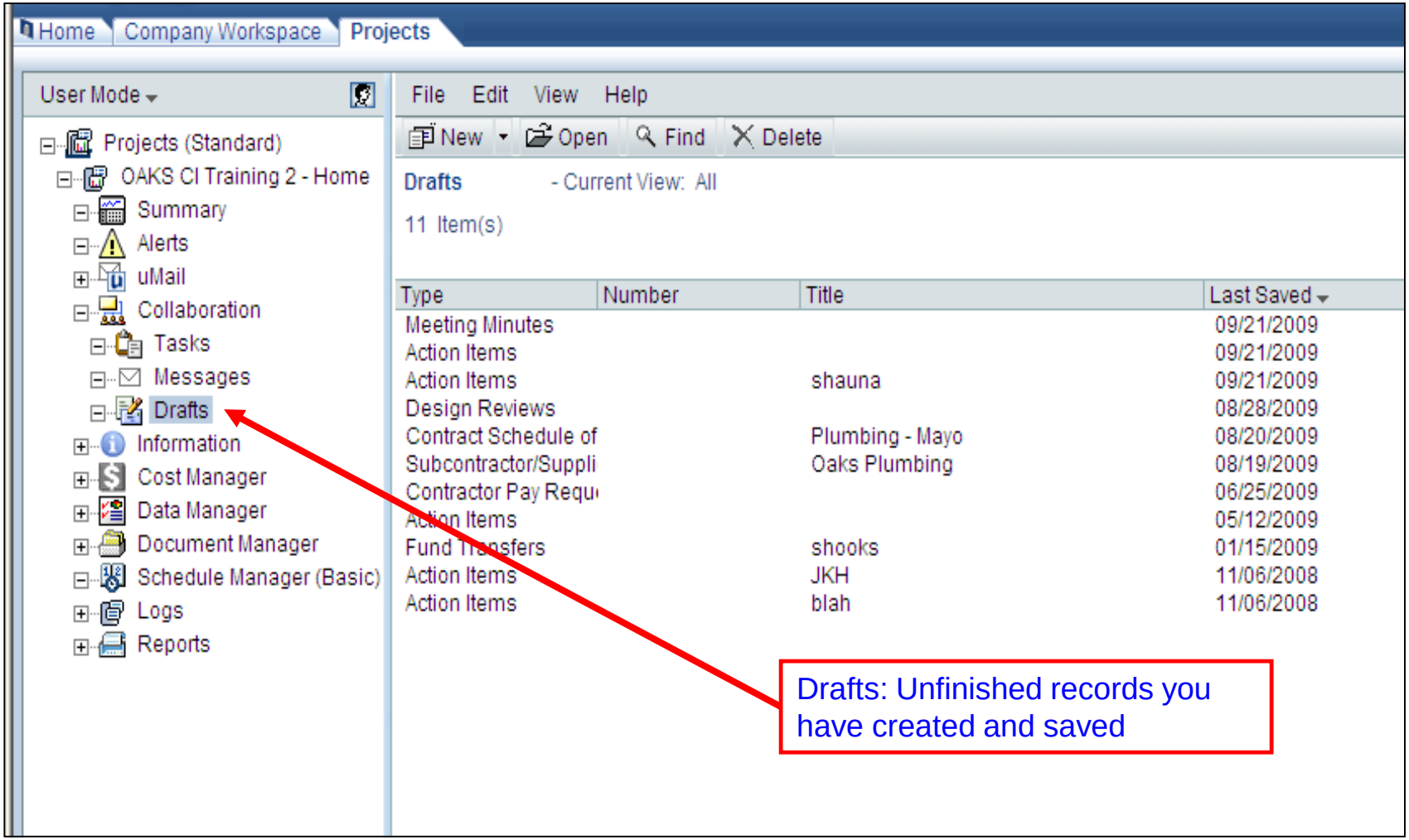
Tasks (Your Records)



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

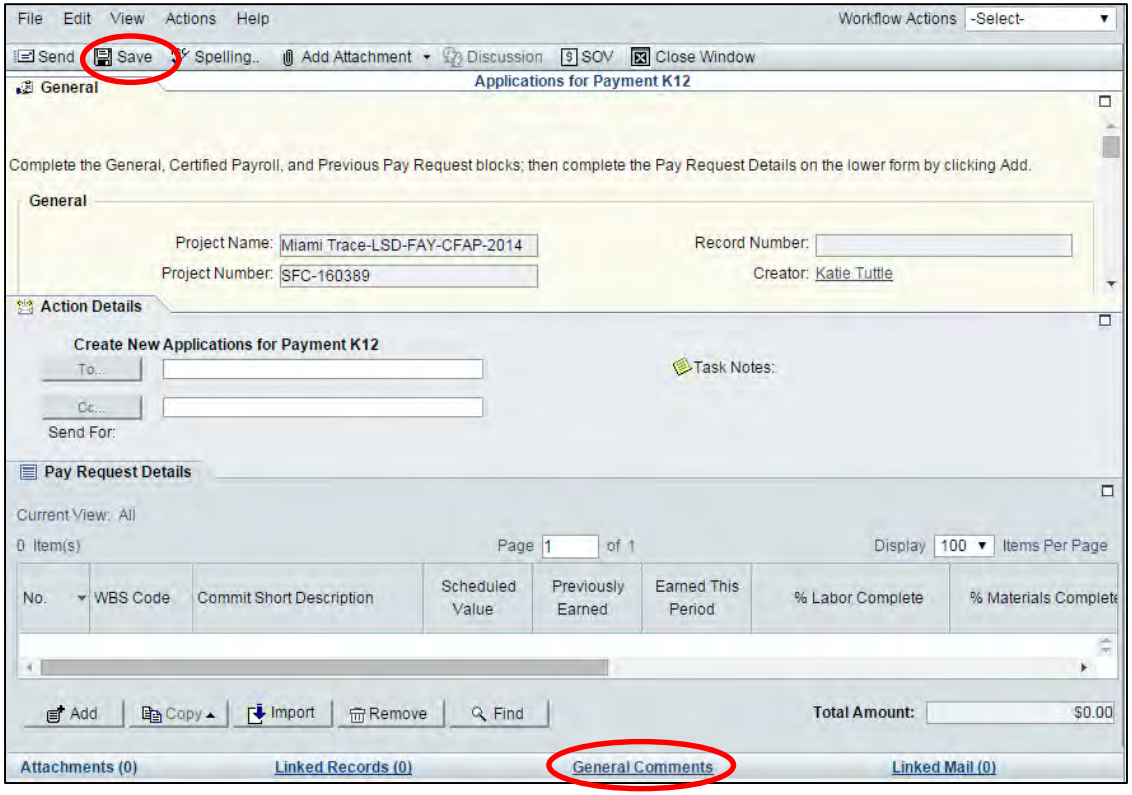

Home
Company Workspace
Projects
User Mode
File
Edit
View
Help
New
Open
Find
Delete
Projects (Standard)
OAKS CI Training 2 - Home
Summary
Alerts
uMail
Collaboration
Tasks
Messages
Drafts
Information
Cost Manager
Data Manager
Document Manager
Schedule Manager (Basic)
Logs
Reports
Drafts
- Current View: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



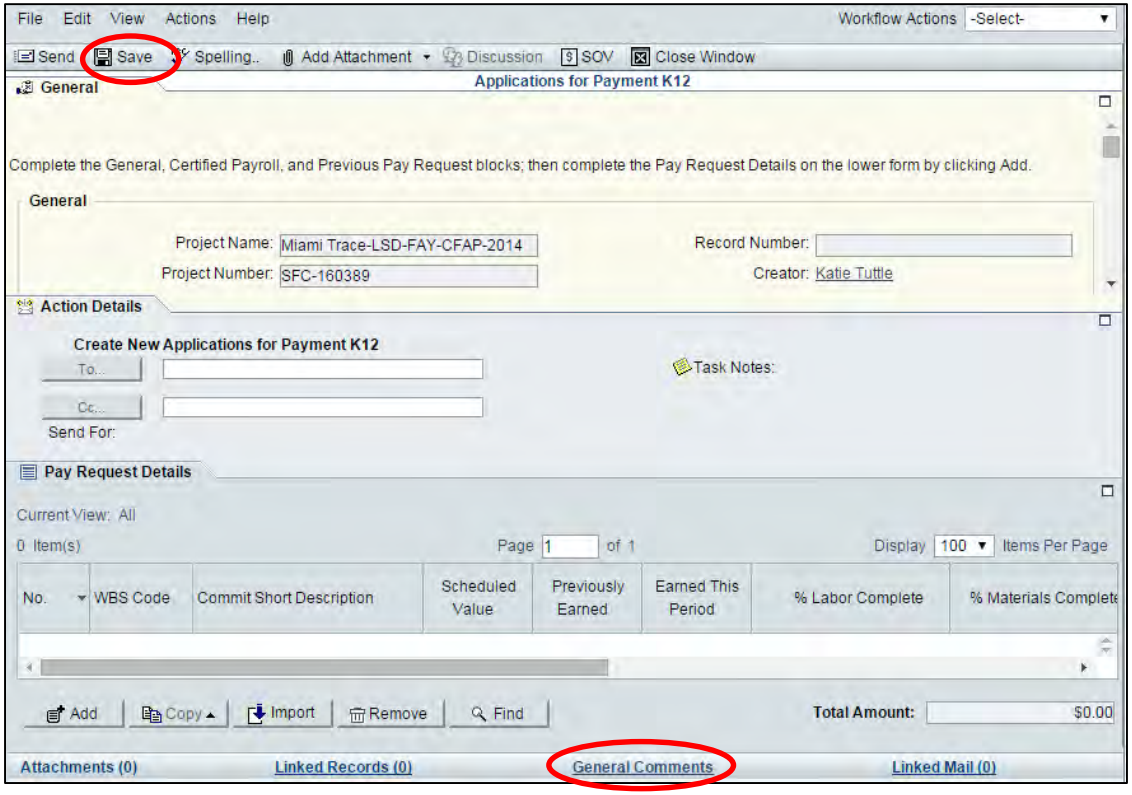
Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you're typing extensive notes, first type them in a Word doc then copy and paste into General Comments

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

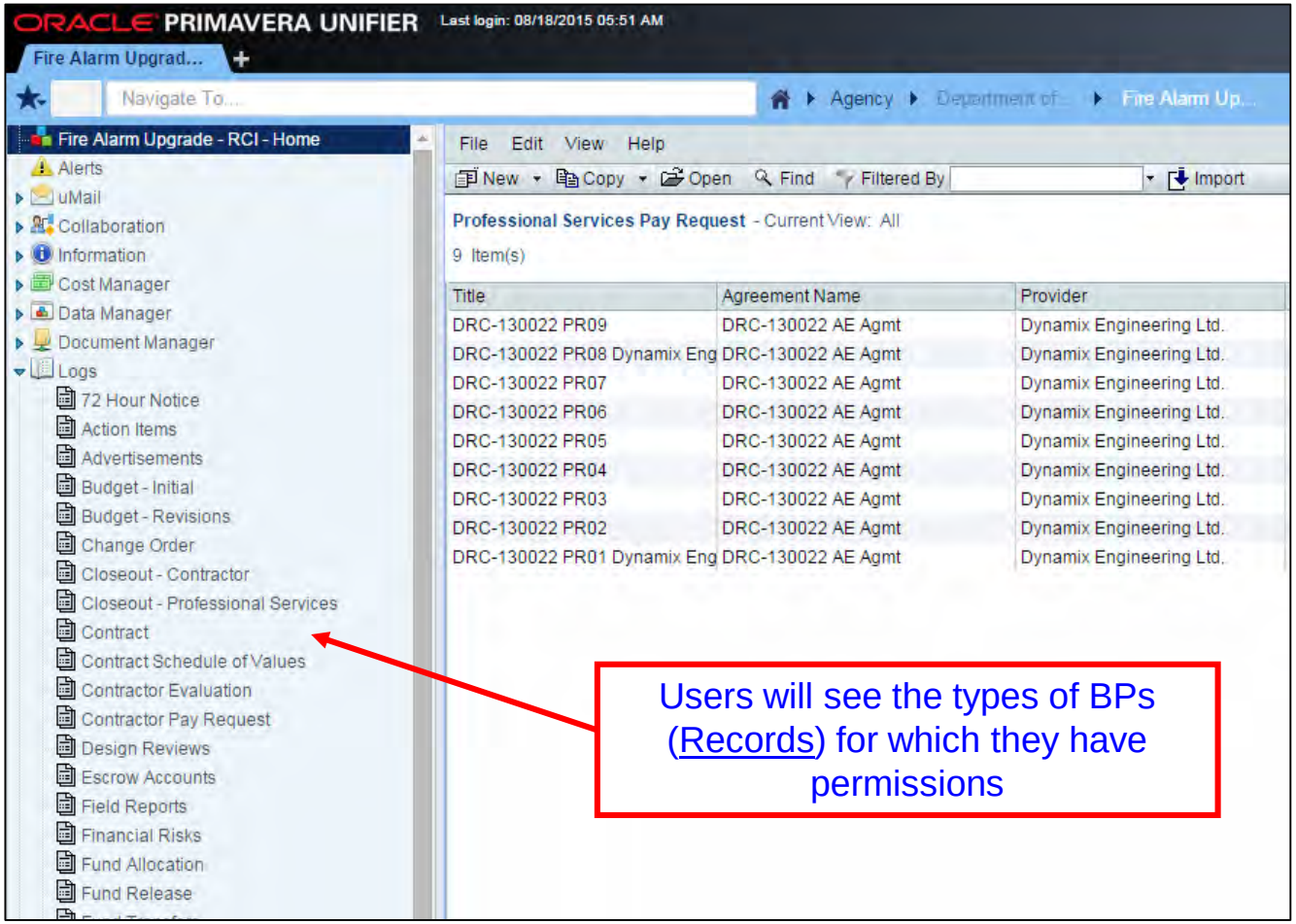


Note: Typing General Comments is not recognized as accessing the system and the system will time out after 60 minutes. If you're typing extensive notes, first type them in a Word doc then copy and paste into General Comments

Logs

Logs house Business Processes or "BPs" (Records)

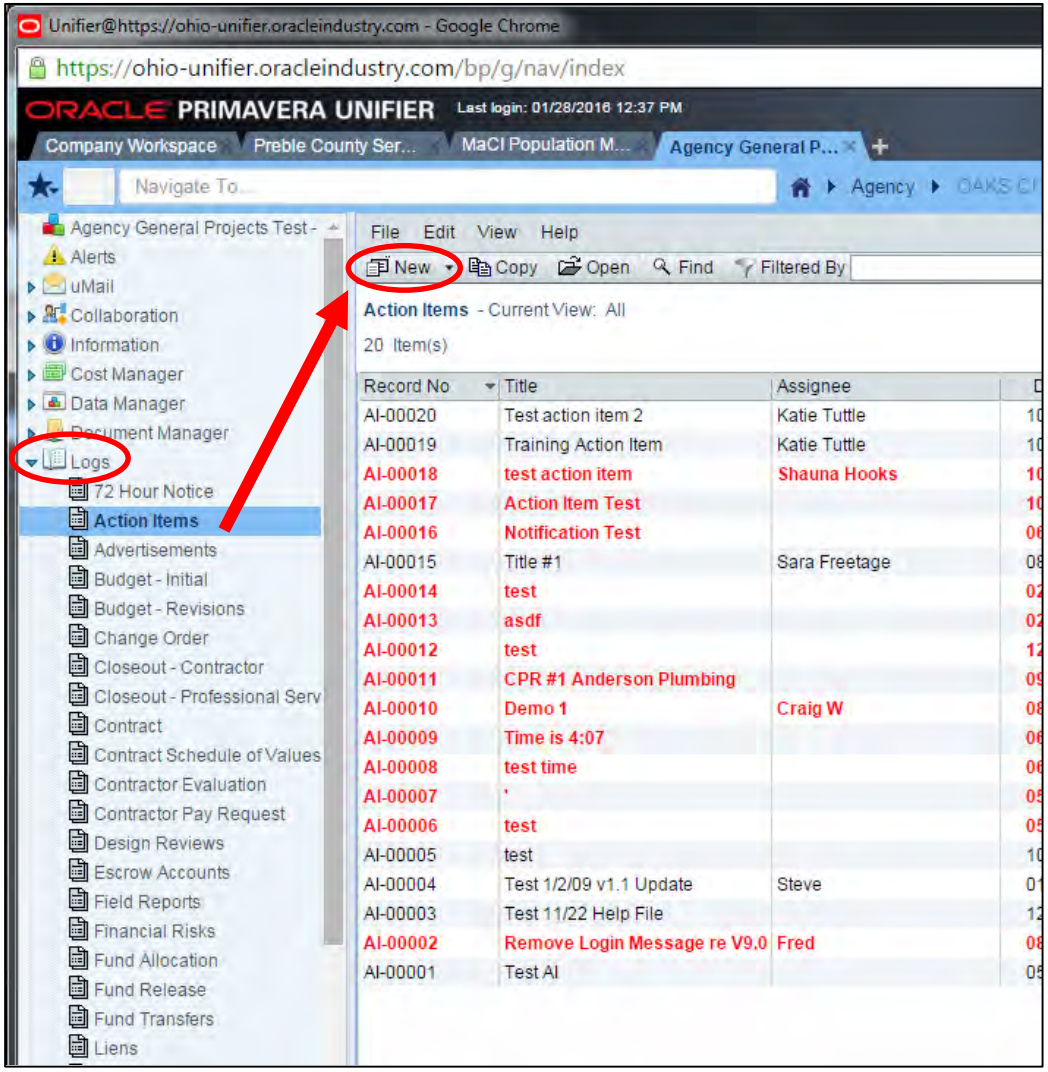
- A BP is any Record that has been created (i.e. Pay Requests, Submittals, etc.) and submitted through a workflow for review or approval.



How do Records Work?

Create a Record

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



Create a Record

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

Create New Action Items - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=uai&csvimport=false

File Edit View Actions Help Workflow Actions -Select-

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

Action Items

Action Items

General

Organization: Department of Administrative Services
Project Number: OCI-080001
Project Name: Agency General Projects Test
Project Location: OAKS CI Administration
Title: Test Action Item *
Assignee: Bob Smith
Meeting Minute: Select...

Record Number:
Creator: Katie Tuttle
Creation Date:
Status:
Priority: High
Due Date: 11/10/2015 05:27 AM (UTC-8) *

Action

Action Requested: Please review the attached documents *

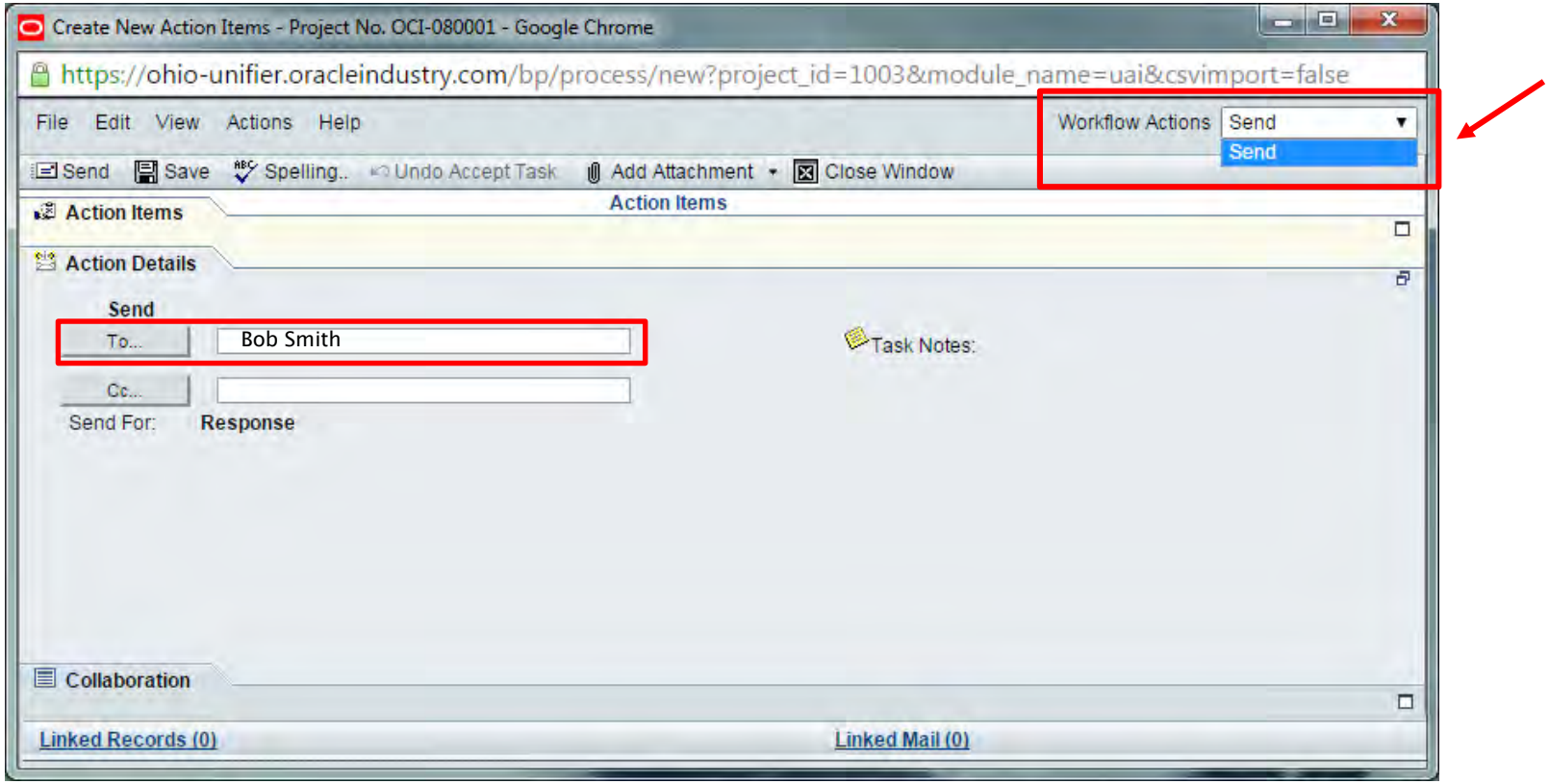
Action Details

Collaboration

Linked Records (0) Linked Mail (0)

Create a Record

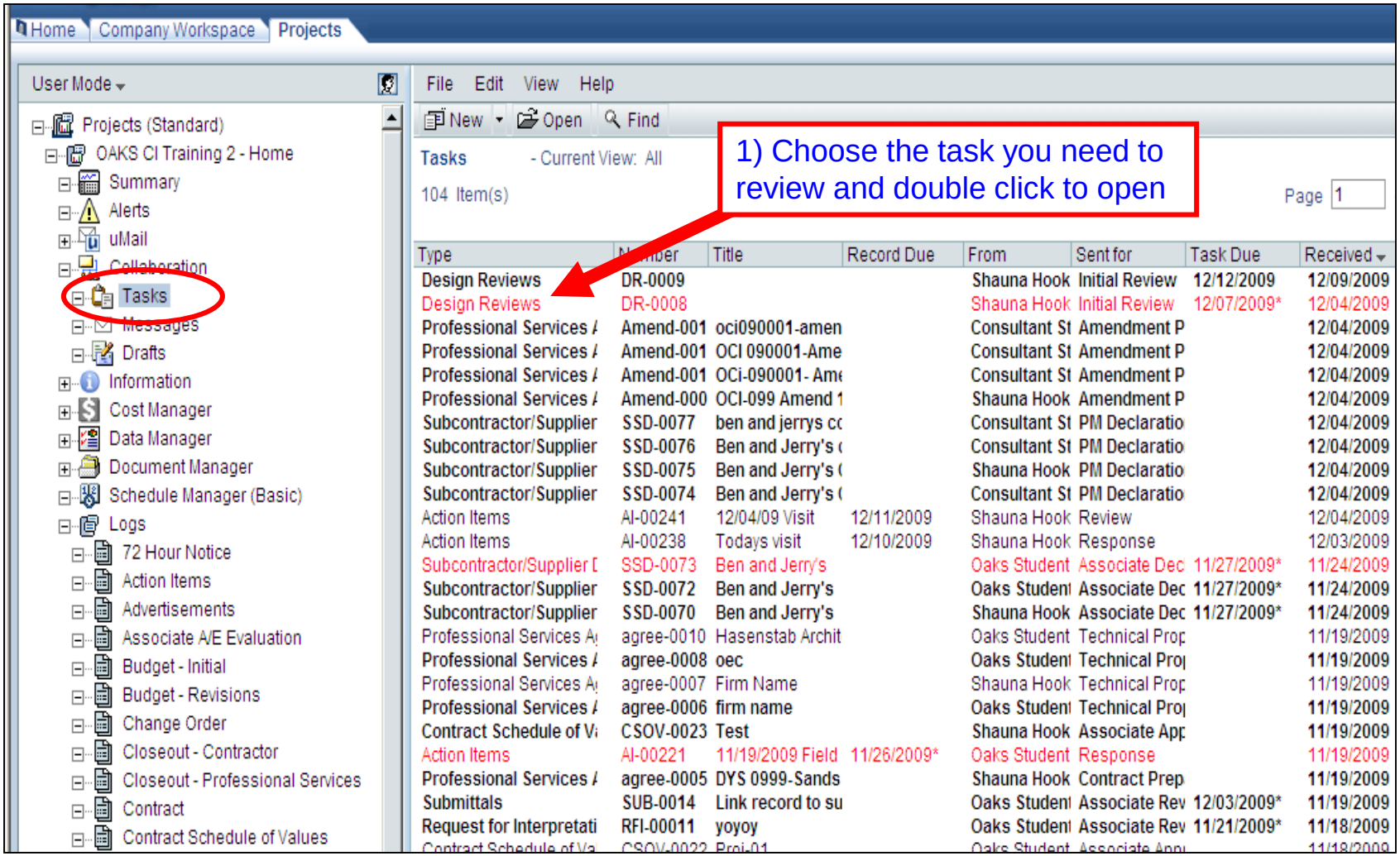
- Choose a Workflow Action
- Click Send



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

Working with Tasks

Reviewing a Task



Reviewing a Task

https://oaksci.training.ohio.gov/?task_id=29561&parent_id=0&viewOnly=0&project_id=1009 - Design - Windows Internet Explorer

File Edit View Actions Help

Accept Task | Decline Task

General | Design Reviews

2) Click Accept Task

General

Project Name: OAKS CI Training 2

Project Location: Surface Road

Est. Construction Cost ($): 0.00

Record Number: DR-0009

Creation Date: 12/0

Status: Pen

Owner Name: North Central State College

Note: Click to add a temporary note that will go only to the next person in the workflow

Task Details

From: Shauna Hooks;

To: Project Manager;Becky Bessell; More..

Cc:

Sent For: Initial Review

Task Due Date: 12/12/2009

Task Status: Not Started

Task Notes (0)

Design Reviews

Attachment Index : (3)

Display Attachments with Comments by: All

New Rename Move Delete

Attachments

3 Item(s)

Page 1 of 1

Display 100 items per page

File Name	Type	Status
Design	Drawings	Submitted
Design	Shop Drawing	Submitted
Design	Informational	Accepted

Comments | Download | Find

Linked Records (0) | General Comments | Linked uMails (0)

Responding to a Task

https://oaksci.training.ohio.gov/?srcid=26&model=udr&fromcostlog=1&project_id=1009 - Design Rev - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

-Select-
Return For Clarification
Send For Detailed Review

1) Select Appropriate Workflow Action

Send Save Spelling... Discussion

General

General

Organization: North Central State College
Project Number: OCI-080002
Project Name: OAKS CI Training 2
Project Location: Surface Road
Est. Construction Cost ($): 0.00

Record Number: DR-0008
Creator: Shauna Hooks
Creation Date: 12/04/2009 01:40 PM Local (GMT-5)
Status: Pending
Owner Name: North Central State College

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:

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

Design Reviews

Attachment Index : (3)

New Rename Move Delete

Attachments

3 Item(s)

Display Attachments with Comments by: All

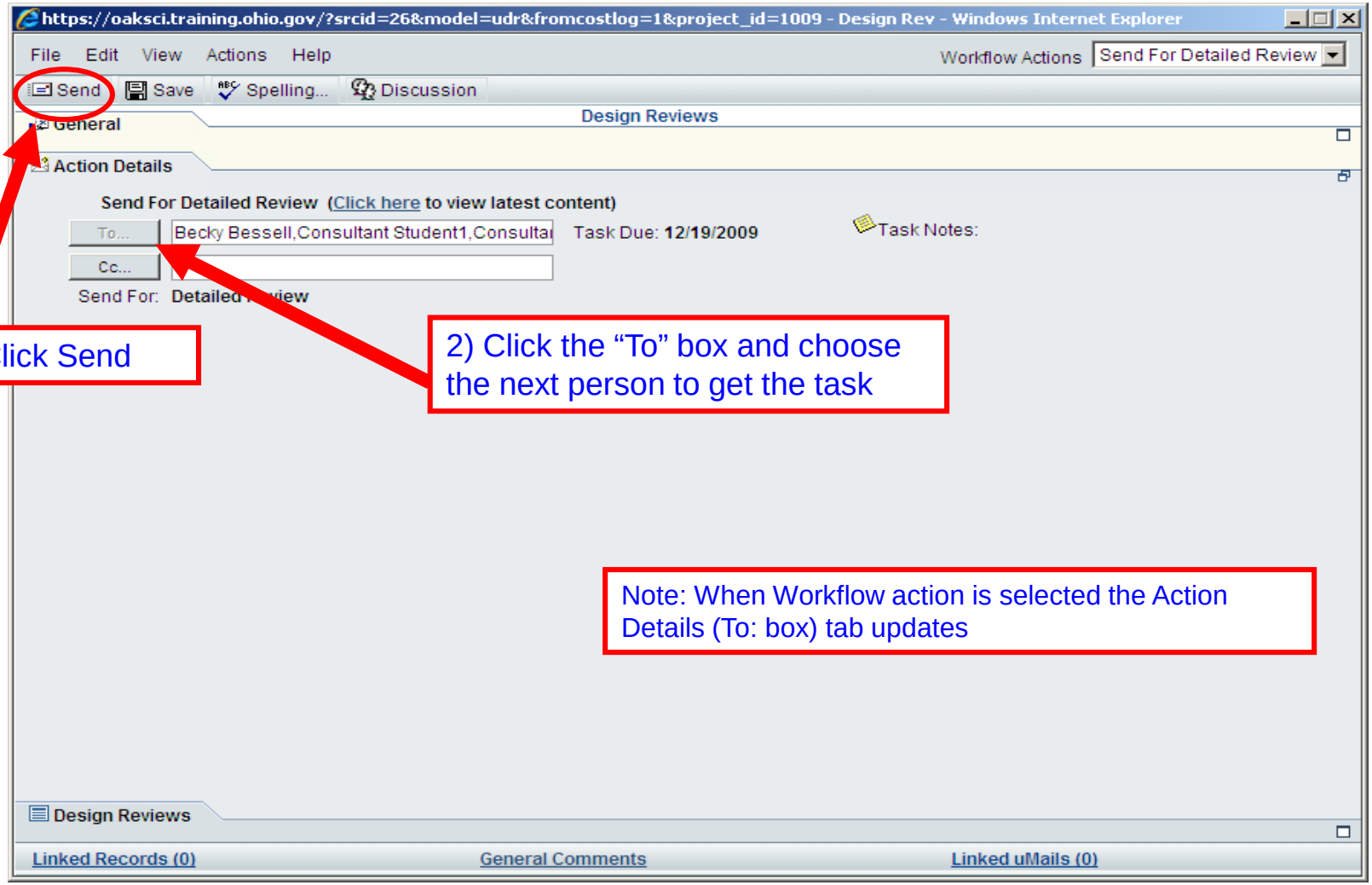
Page 1 of 1 Display 100 items per page

		File Name	Type	Status
		done.txt	Energy Analysis	Submitted
		done.txt	Energy Analysis	Submitted
		ell.sdr	Drawings	Submitted

Add Import Remove Comments Download Find

Linked Records (0) General Comments Linked uMails (0)

Responding to a Task



3) Click Send

2) Click the "To" box and choose the next person to get the task

Note: When Workflow action is selected the Action Details (To: box) tab updates

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

Finding the Record Status

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
      - 72 Hour Notice
      - Action Items
      - Advertisements
      - Associate A/E Evaluation
      - Budget - Initial
      - Budget - Revisions
      - Change Order
      - Closeout - Contractor
      - Closeout - Professional Services
      - Contract
      - Contract Schedule of Values
      - Contractor Evaluations
      - Contractor Pay Request
      - Design Reviews
      - Escrow Accounts
      - Field Reports
      - Financial Risks
      - Fund Allocation
      - Fund Release
      - Fund Transfers
      - Liens
      - Local Administration Authorization R
      - Meeting Minutes
      - Memorandum of Understanding
      - Miscellaneous Commit
      - Miscellaneous Invoice
      - Prevailing Wage Report
      - Professional Services Acquisition
      - Professional Services Agreements
      - Professional Services Amendments
      - Professional Services Fee Allowanc
      - Professional Services Pay Request
      - Program of Requirements
      - Punch Lists
      - Purchase Orders

File Edit View Help

New | Copy | Open | Find | Import | Export Template

Professional Services Pay Request - Current View: All

2 Item(s)

Page 1 of 1

Title	Agreement Name	Provider	Amount	Final Payment?	Status	Record Number
Garys Arch. PR#1	Star Consultants	Star Consultants, Inc.	7,500.00	No	Pending	PSPR--0002
PR 1	Star Consultants	Star Consultants, Inc.	16,000.00	No	Pending	PSPR--0001

Finding the Record Status

https://oaksci.training.ohio.gov/?srcid=500&model=upspr&fromcostlog=1&project_id=1009 - Profess - Windows Internet Explorer

File Edit View Actions Help

Accept Task | Decline Task | SOV | Close Window

General — Professional Services Pay Request

General

Organization:	North Central State College	Record Number:	PSPR--0002
Project Number:	OCI-080002	Creator:	Shauna Hooks
Project Name:	OAKS CI Training 2	Creation Date:	12/09/2009 11:34 AM Local (GMT-5)
Project Location:	Surface Road	Status:	Approved
Title:	Garys Arch. PR#1	Internal Ref. Number:	

Task Details

From: Shauna Hooks;
To: Owner Financial;Becky Bessell; More
Cc:
Sent For: **Payment Process**

Task Due Date:
Task Status: Not Started

Task Notes (0)

Pay Request Details

Show Currency in: Transaction Currency

1 Item(s) Page 1 of 1 Display 100 items per page

No.	WBS Code	Code Name	Short Description	Amount
001	AE-BS-DD	AE Design Development Service	Redesign	7,500.00

Find

Total Amount: $ 7,500.00

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

Finding the Record Status

https://oaksci.training.ohio.gov/?processId=2010&selected_node_id=1544 - BP Progress - Windows Internet Explorer

Workflow Progress

Title:	Garys Arch. PR#1	Current Step:	Payment Process
Record No:	PSPR--0002	BP Setup used:	Professional Services Pay Request
Due Date:			

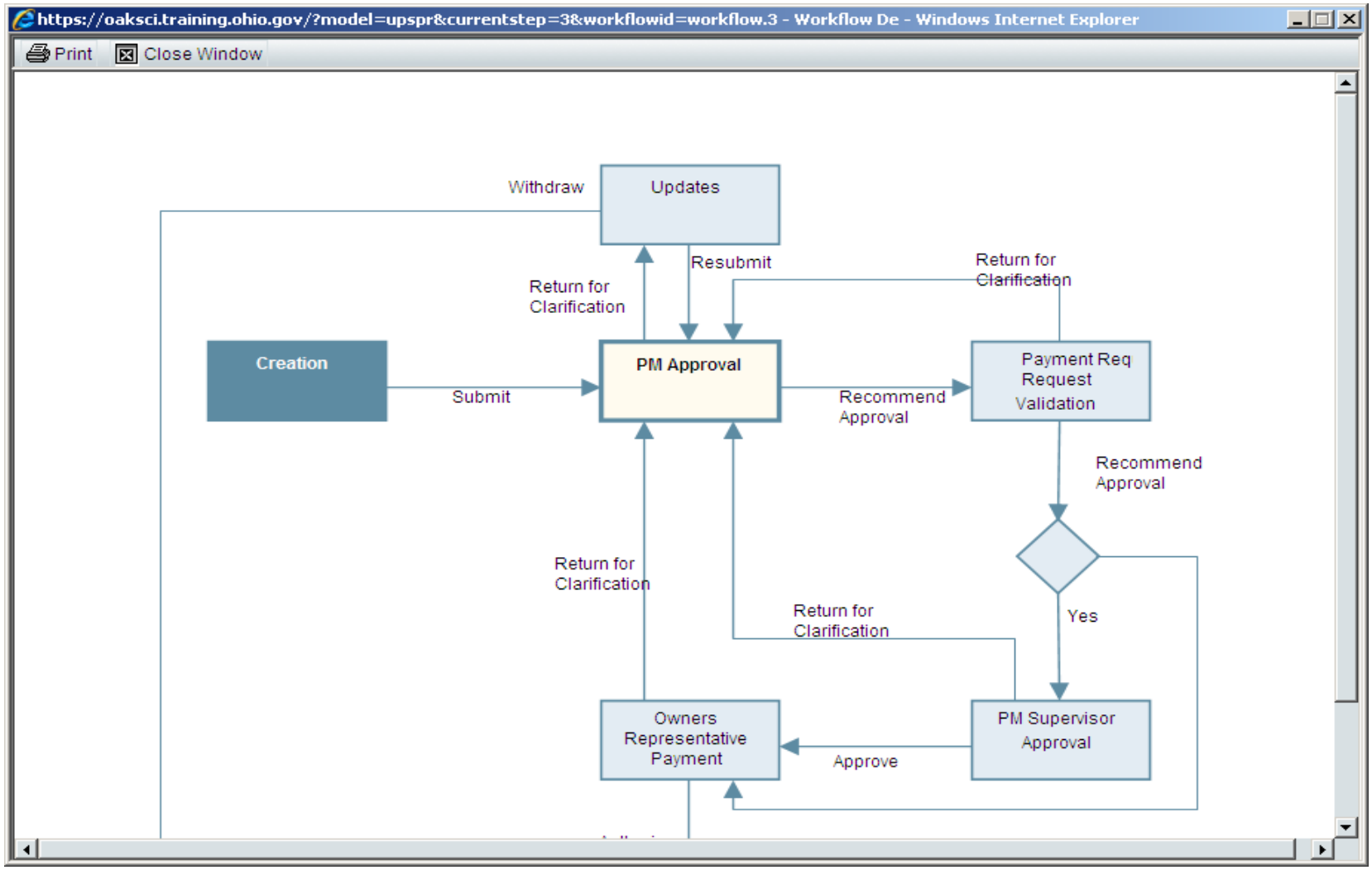
Step Name	Completion Rule	Status
Creation	Any User	Completed
PM Approval	Any User	Completed
Updates	Any User	Not Started
PM Supervisor Approval	Any User	Not Started
Owners Representative Payment Authorizat	Any User	Completed
Payment Request Validation	Any User	Completed
Payment Process	**Any User**	**Not Started**
End	Any User	Not Started

Tasks for the selected step:

Assignee	Company	Status	Action	Due Date	Completion Date
Shauna Hooks	soo	Completed	Recommend Approva		12/09/2009 11:38 AM I
Shauna Hooks	soo	Closed	Return for Clarificatio		12/09/2009 11:37 AM I

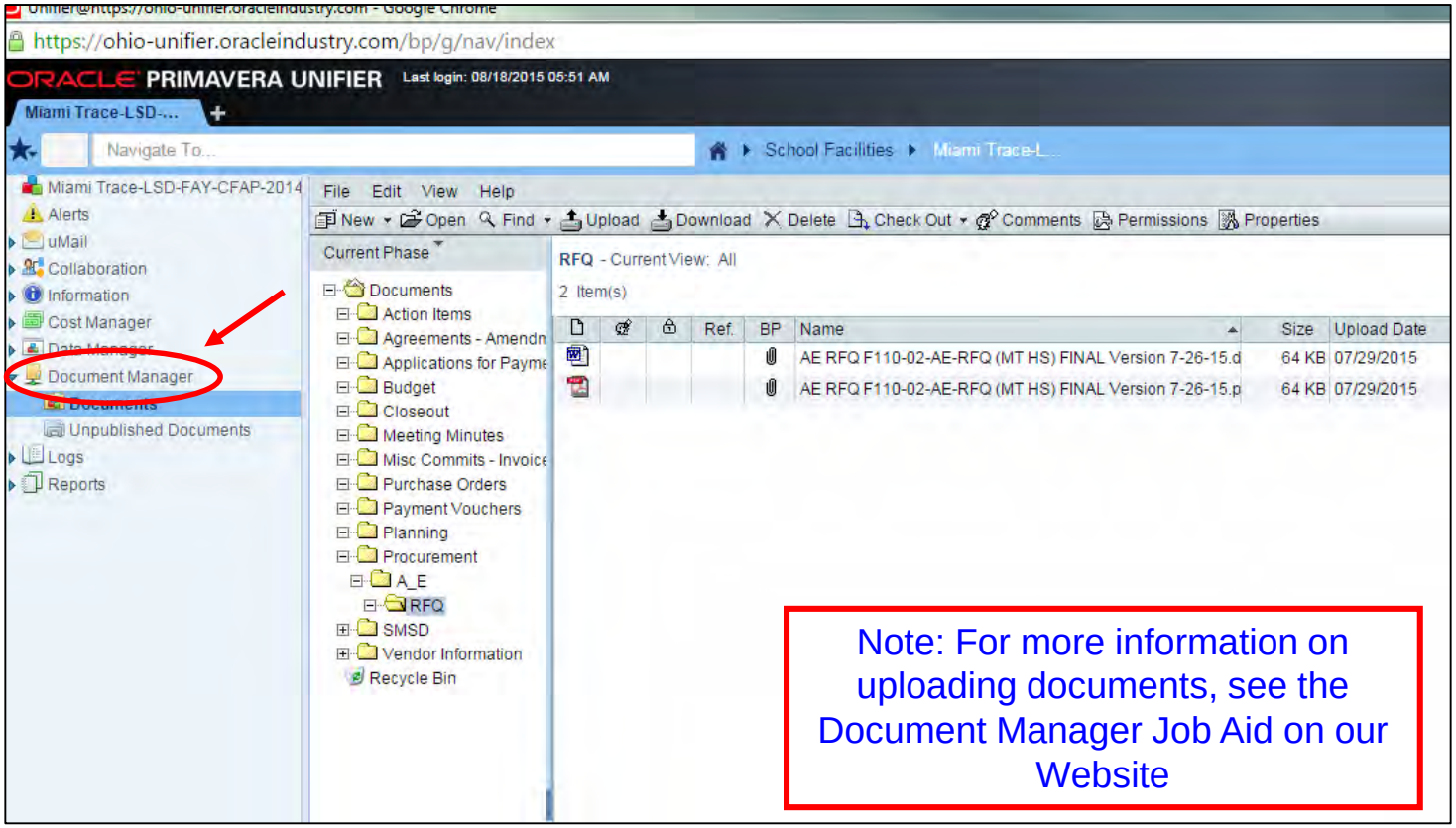
View Graphic... Close

Graphic View of Workflow



Document Manager

- Document manager houses all supporting documentation
- The utilization of Document Manager will differ based on your particular project
  - For more information on Document Manager please see the Job Aid located on our website: http://ofcc.ohio.gov/Resources/OAKSCI.aspx



Note: For more information on uploading documents, see the Document Manager Job Aid on our Website

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211