OAKS
Capital Improvements

Create Work Assignments

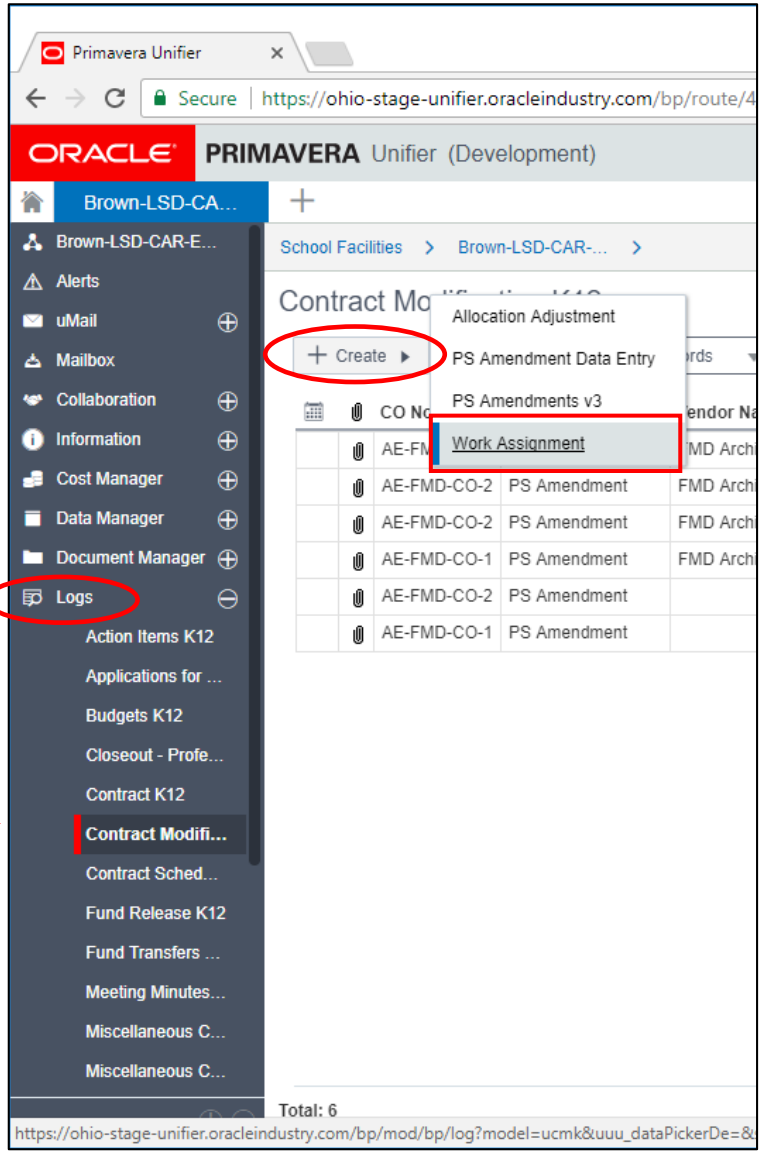
(Contract Modification or PS Amendment)

When Using Neutral Facilitators

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

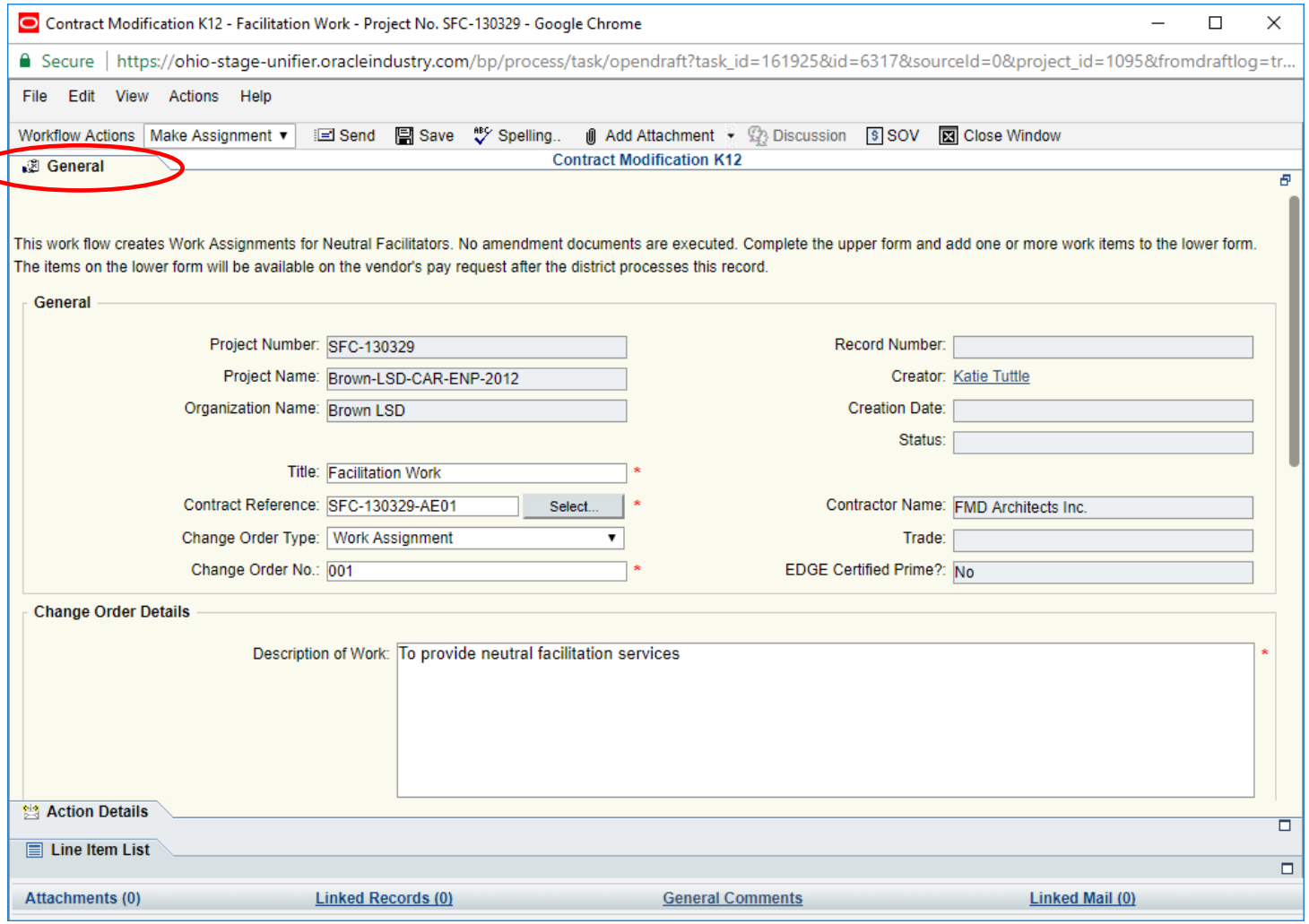
Creating a Work Assignment

- In Oaks CI navigate to:
  - Logs -> Contract Modifications or Change Order
  - Click Create
  - Choose “Work Assignment” workflow



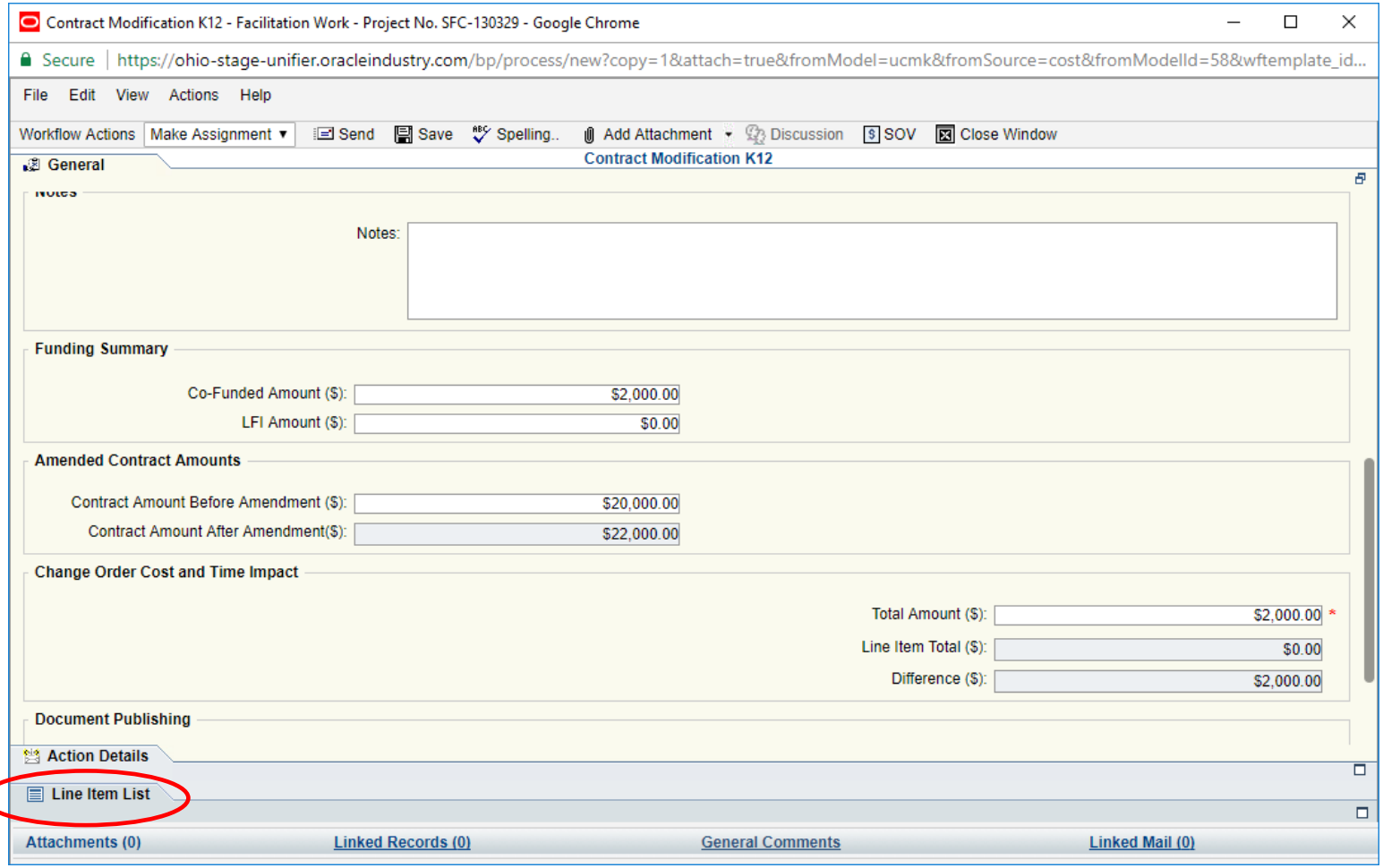
Form Completion

- Enter all relevant information into the general form
- Items with a red * are required



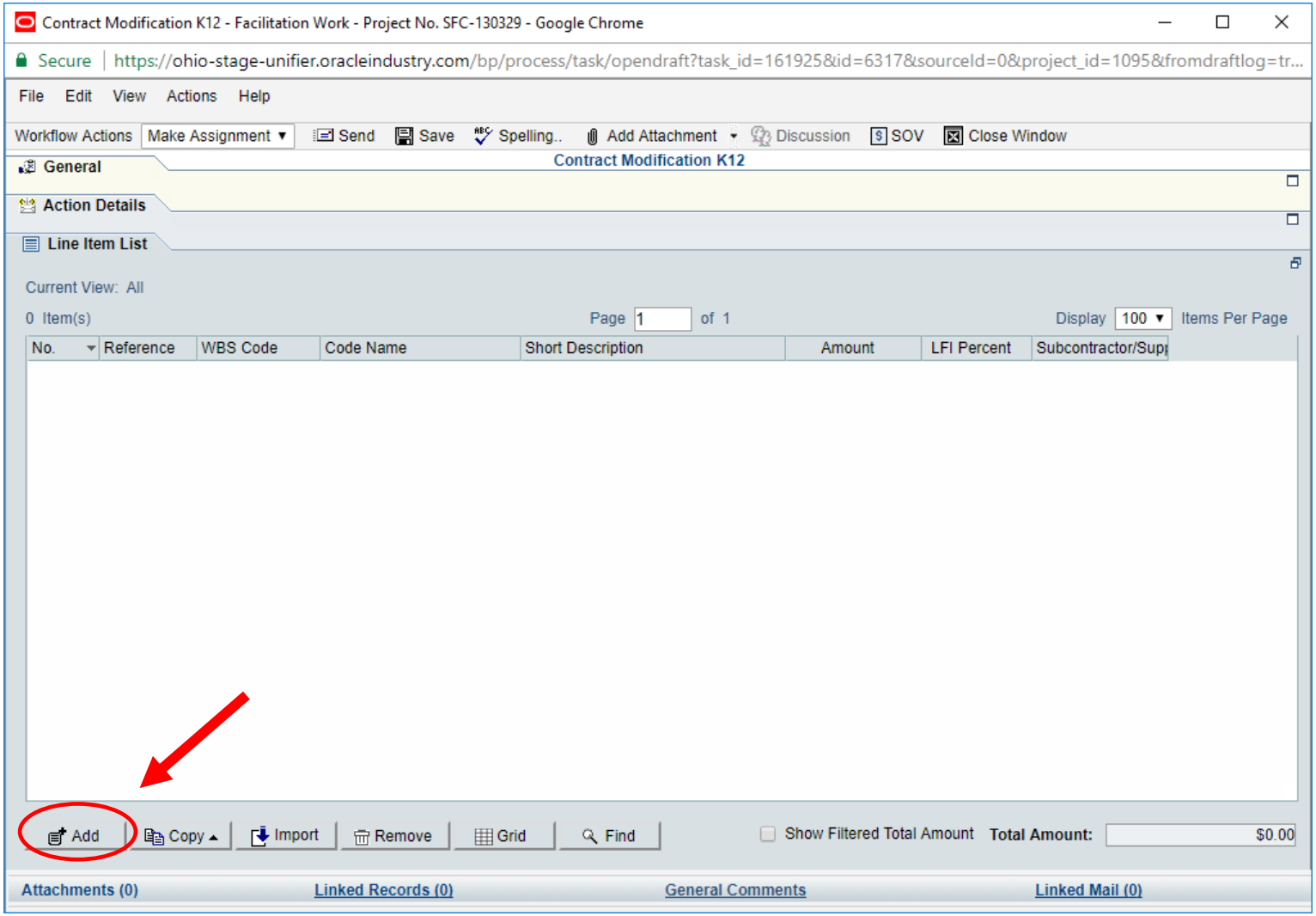
Form Completion

- Scroll down to complete the remainder of the general form
- Then click the Line Item List tab to identify the work to be assigned



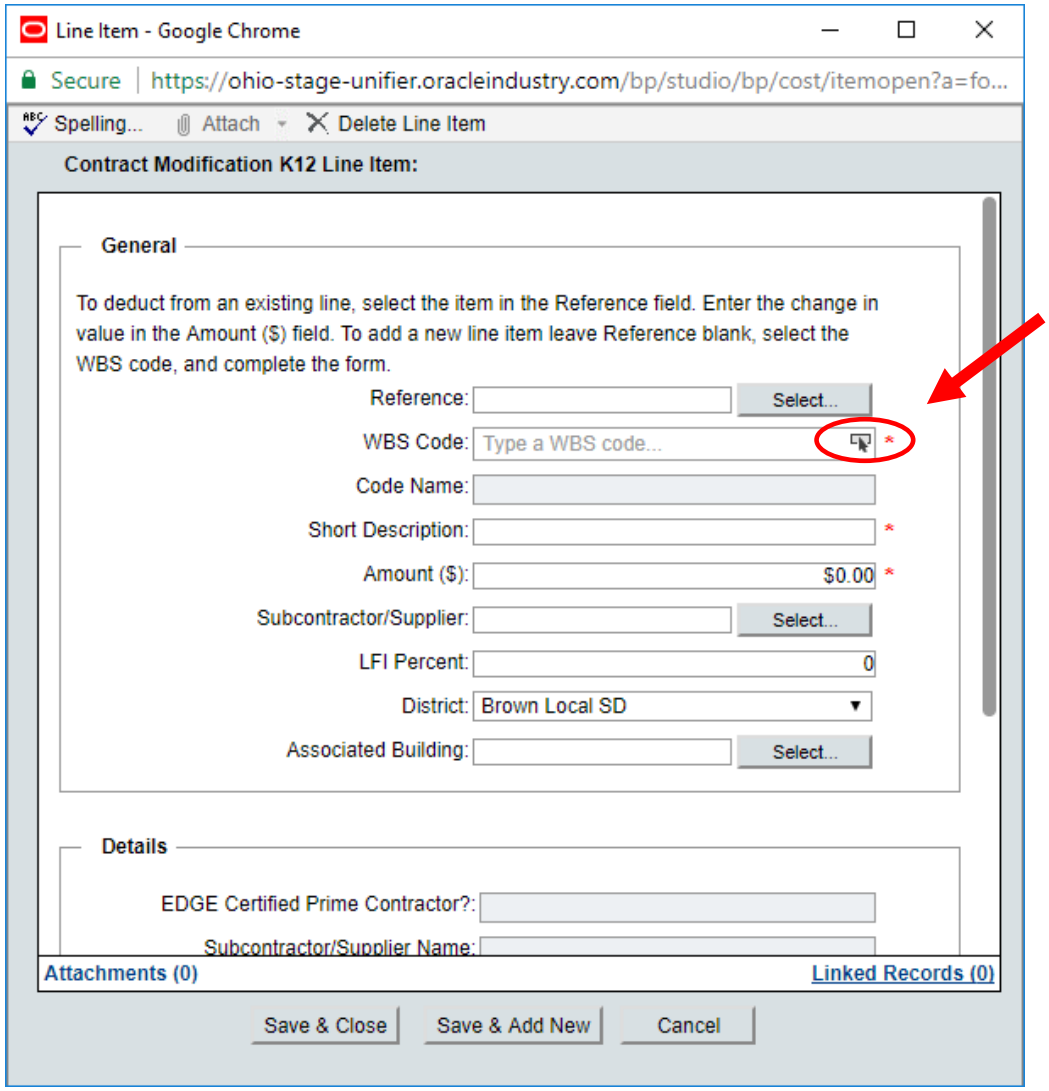
Add Line Items

- In the Line Item List tab, click the Add Button



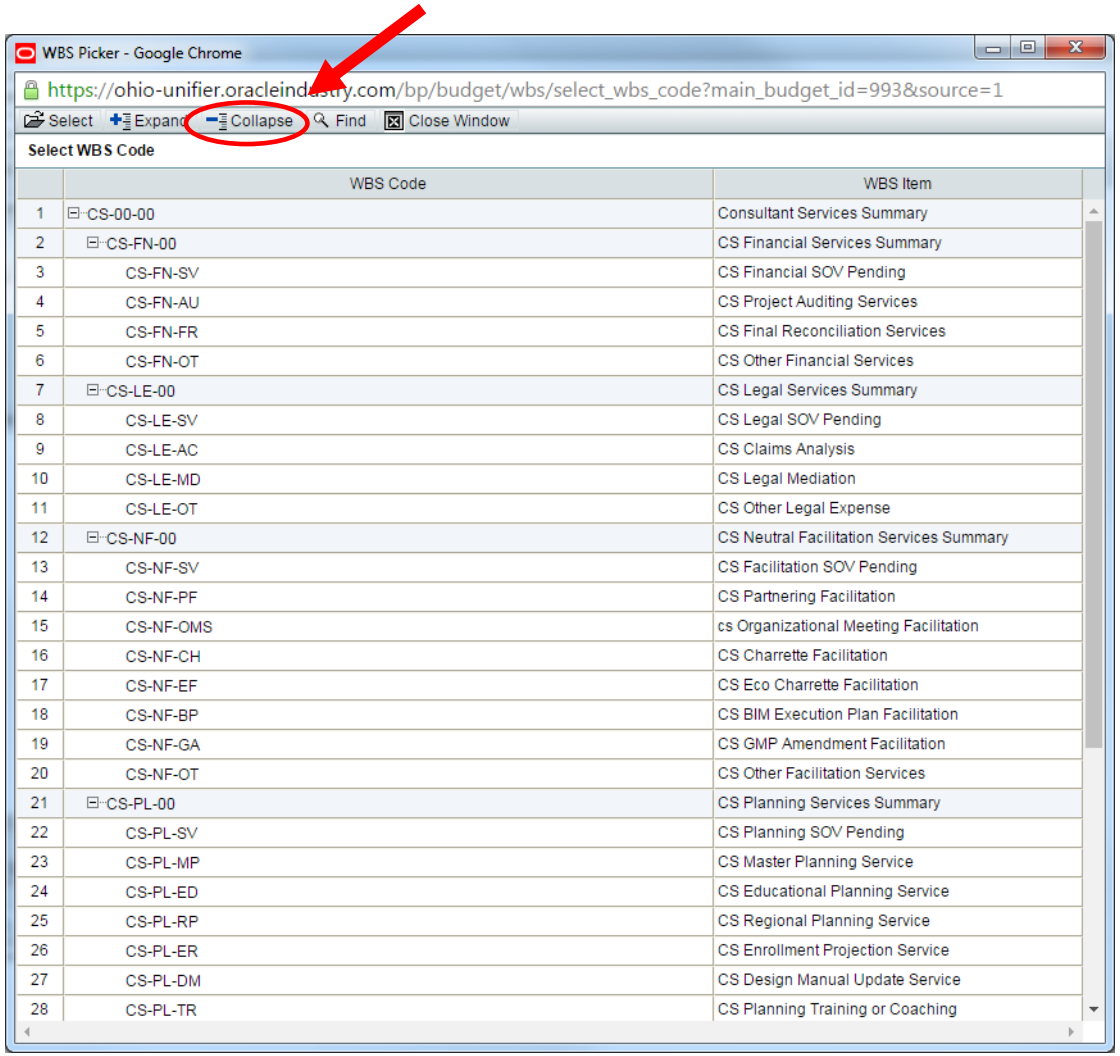
Add Line Items

- Click the arrow next to WBS code



Add Line Items

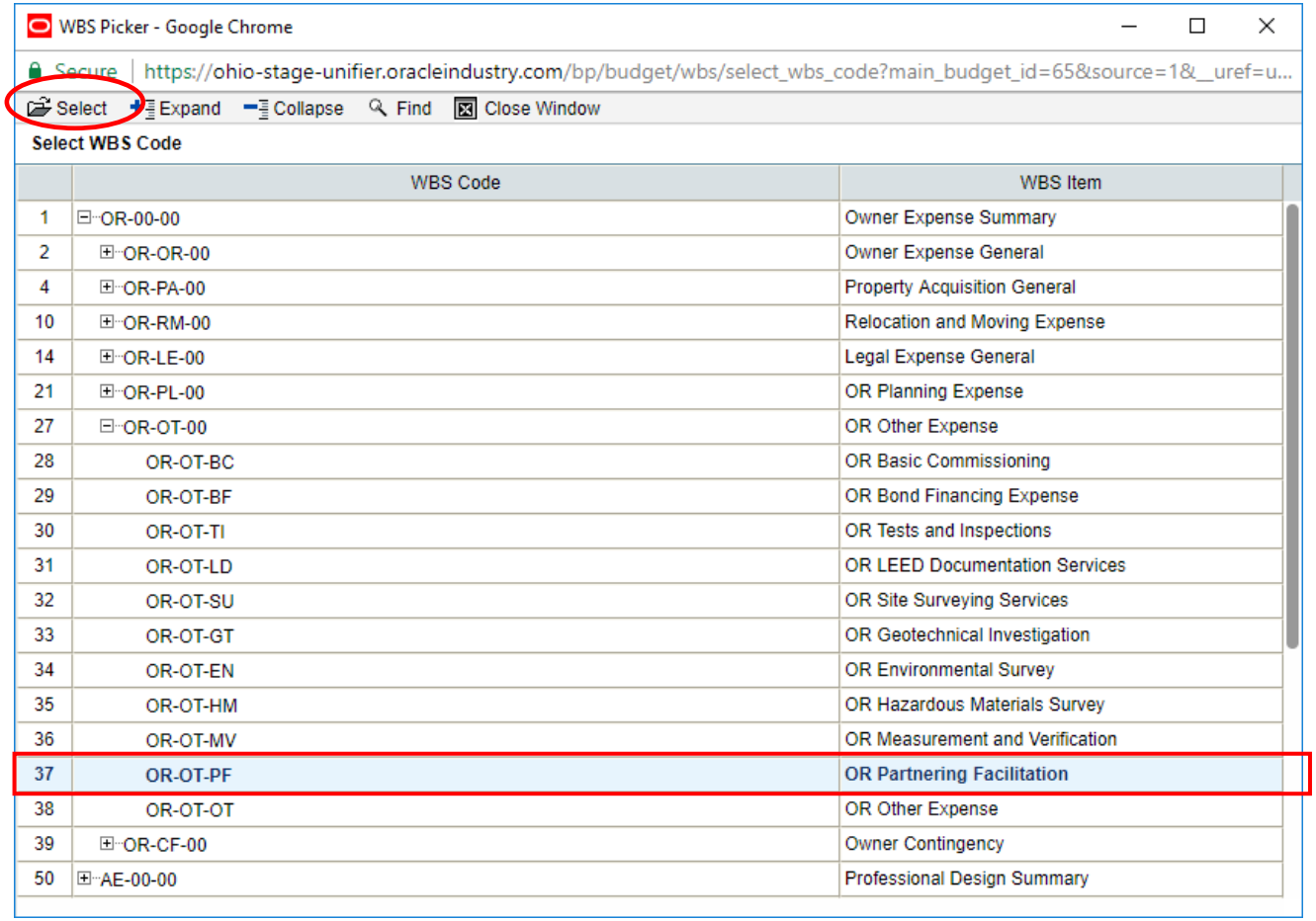
- You will see a large list of WBS codes
- To simplify, click Collapse



	WBS Code	WBS Item
1	CS-00-00	Consultant Services Summary
2	CS-FN-00	CS Financial Services Summary
3	CS-FN-SV	CS Financial SOV Pending
4	CS-FN-AU	CS Project Auditing Services
5	CS-FN-FR	CS Final Reconciliation Services
6	CS-FN-OT	CS Other Financial Services
7	CS-LE-00	CS Legal Services Summary
8	CS-LE-SV	CS Legal SOV Pending
9	CS-LE-AC	CS Claims Analysis
10	CS-LE-MD	CS Legal Mediation
11	CS-LE-OT	CS Other Legal Expense
12	CS-NF-00	CS Neutral Facilitation Services Summary
13	CS-NF-SV	CS Facilitation SOV Pending
14	CS-NF-PF	CS Partnering Facilitation
15	CS-NF-OMS	cs Organizational Meeting Facilitation
16	CS-NF-CH	CS Charrette Facilitation
17	CS-NF-EF	CS Eco Charrette Facilitation
18	CS-NF-BP	CS BIM Execution Plan Facilitation
19	CS-NF-GA	CS GMP Amendment Facilitation
20	CS-NF-OT	CS Other Facilitation Services
21	CS-PL-00	CS Planning Services Summary
22	CS-PL-SV	CS Planning SOV Pending
23	CS-PL-MP	CS Master Planning Service
24	CS-PL-ED	CS Educational Planning Service
25	CS-PL-RP	CS Regional Planning Service
26	CS-PL-ER	CS Enrollment Projection Service
27	CS-PL-DM	CS Design Manual Update Service
28	CS-PL-TR	CS Planning Training or Coaching

Add Line Items

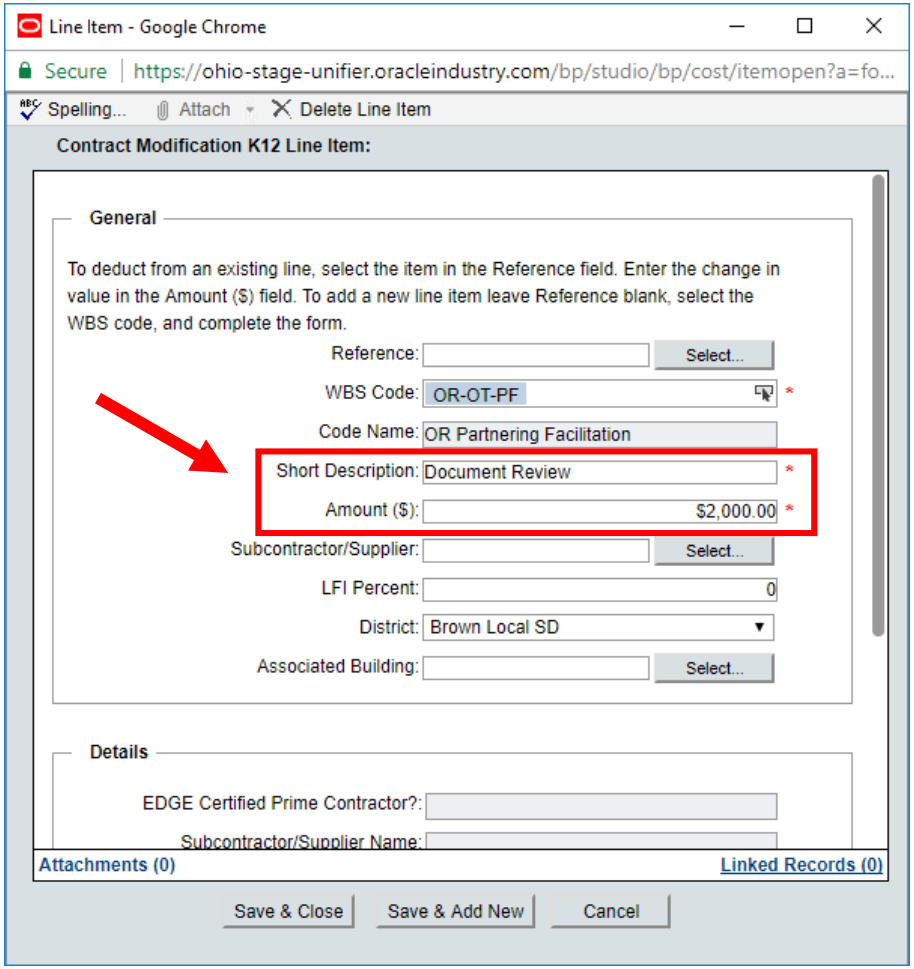
- Now use the (+) buttons to expand the codes
- Choose the appropriate WBS code for the work to be provided and click Select



	WBS Code	WBS Item
1	⊟ OR-00-00	Owner Expense Summary
2	⊞ OR-OR-00	Owner Expense General
4	⊞ OR-PA-00	Property Acquisition General
10	⊞ OR-RM-00	Relocation and Moving Expense
14	⊞ OR-LE-00	Legal Expense General
21	⊞ OR-PL-00	OR Planning Expense
27	⊟ OR-OT-00	OR Other Expense
28	OR-OT-BC	OR Basic Commissioning
29	OR-OT-BF	OR Bond Financing Expense
30	OR-OT-TI	OR Tests and Inspections
31	OR-OT-LD	OR LEED Documentation Services
32	OR-OT-SU	OR Site Surveying Services
33	OR-OT-GT	OR Geotechnical Investigation
34	OR-OT-EN	OR Environmental Survey
35	OR-OT-HM	OR Hazardous Materials Survey
36	OR-OT-MV	OR Measurement and Verification
37	OR-OT-PF	OR Partnering Facilitation
38	OR-OT-OT	OR Other Expense
39	⊞ OR-CF-00	Owner Contingency
50	⊞ AE-00-00	Professional Design Summary

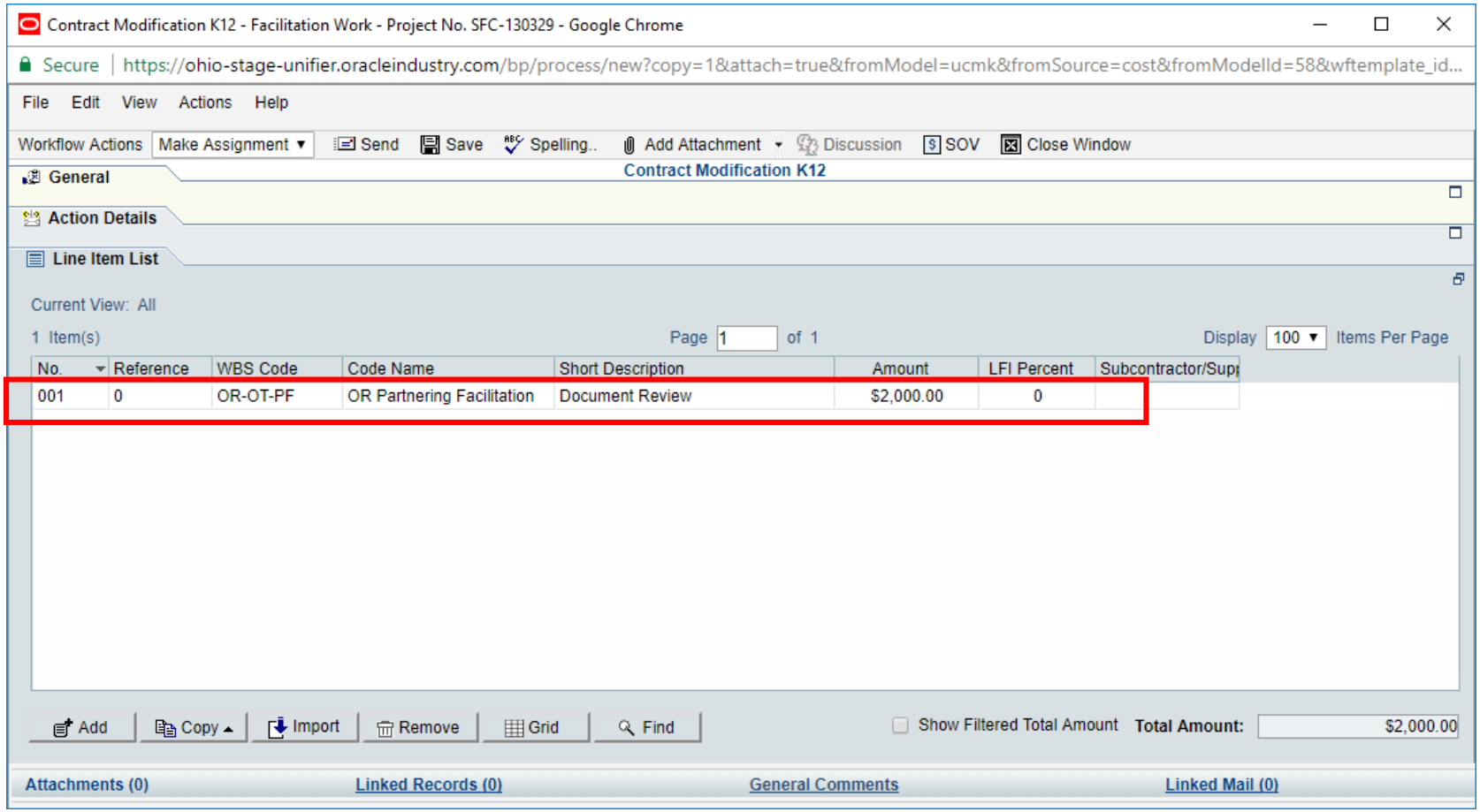
Add Line Items

- WBS Code information will populate into the form
- Enter a Short Description for the work to be provided
- Enter the amount of the Work Assignment
- Click “Save & Close” to finish



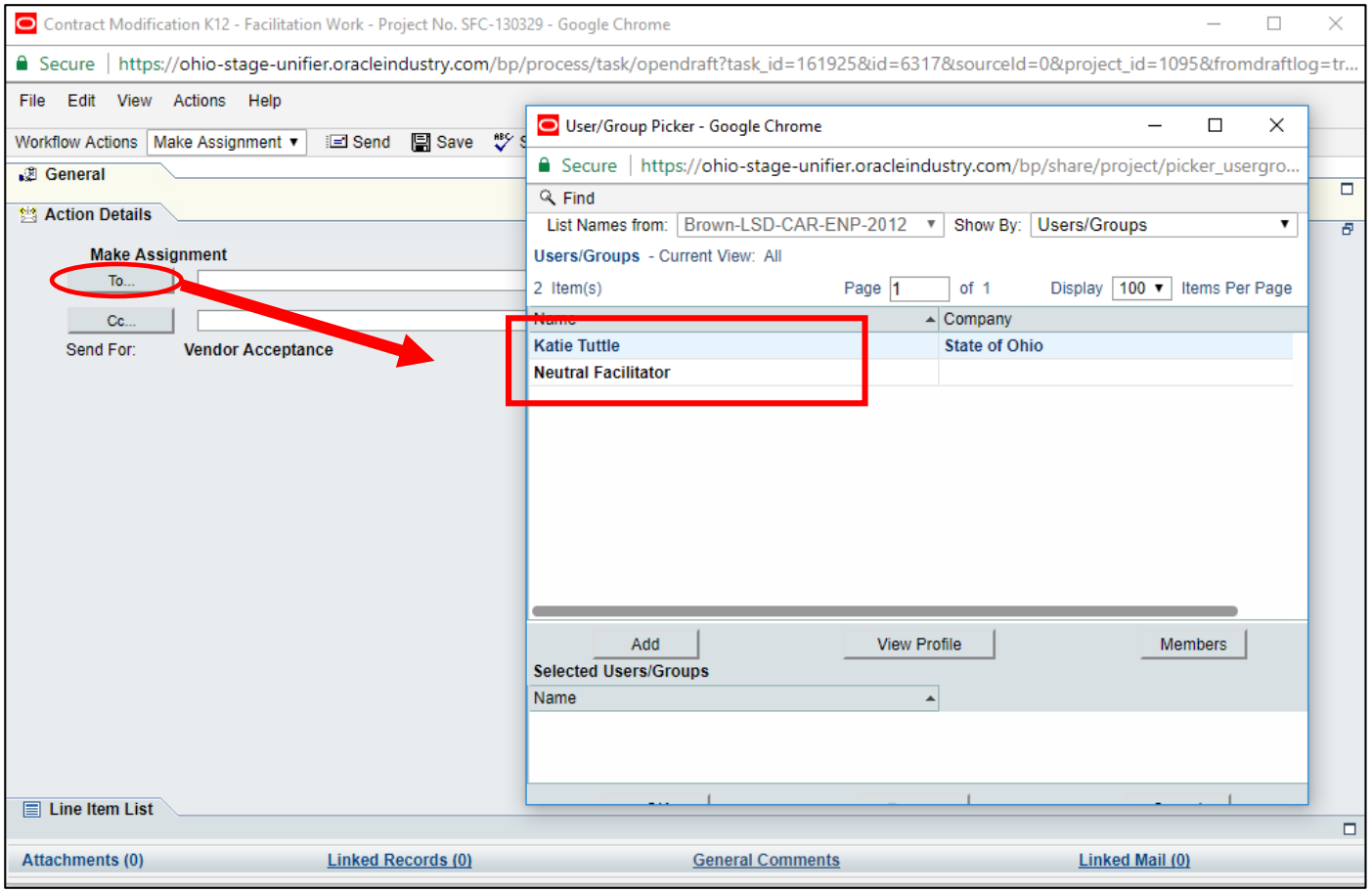
Add Line Items

- The work is now populated in the line item list



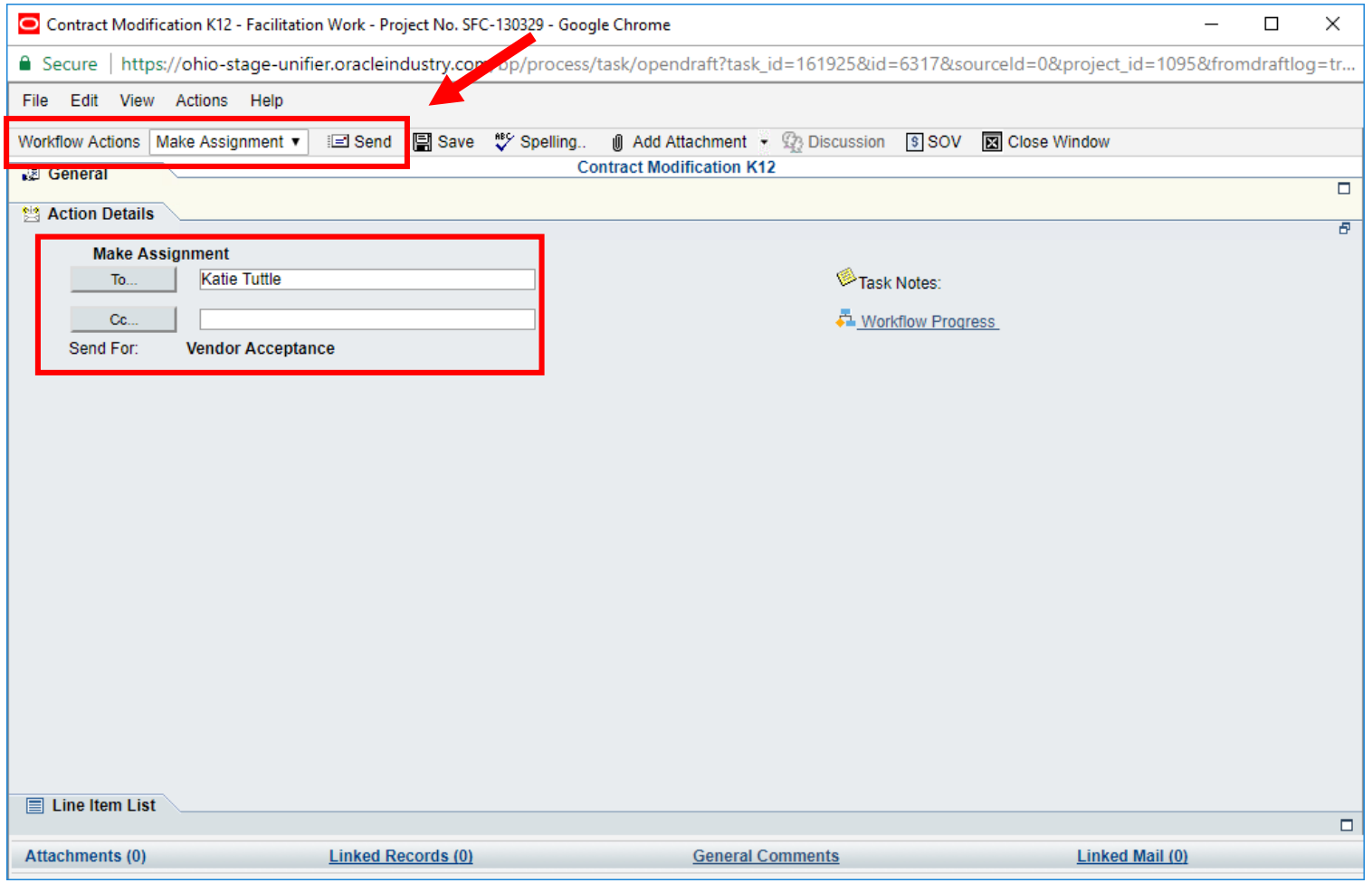
Submit Work Assignment

- You will now submit the Work Assignment to the Facilitator for their review and approval
- Verify Workflow Action
- Click the “To” button to choose the Facilitator you need to send to



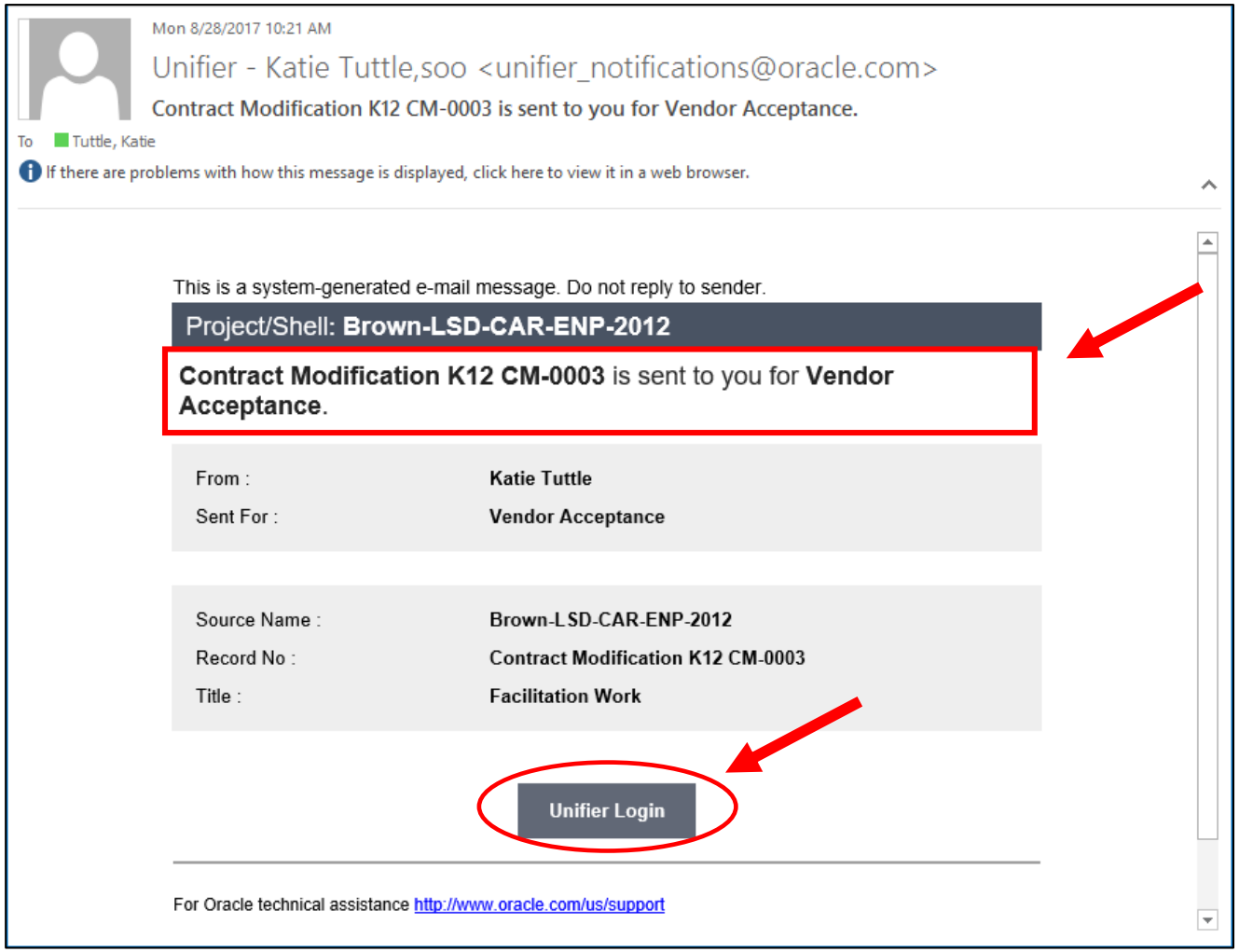
Submit Work Assignment

- Recipients name will now appear in the “to” field
- Click Send



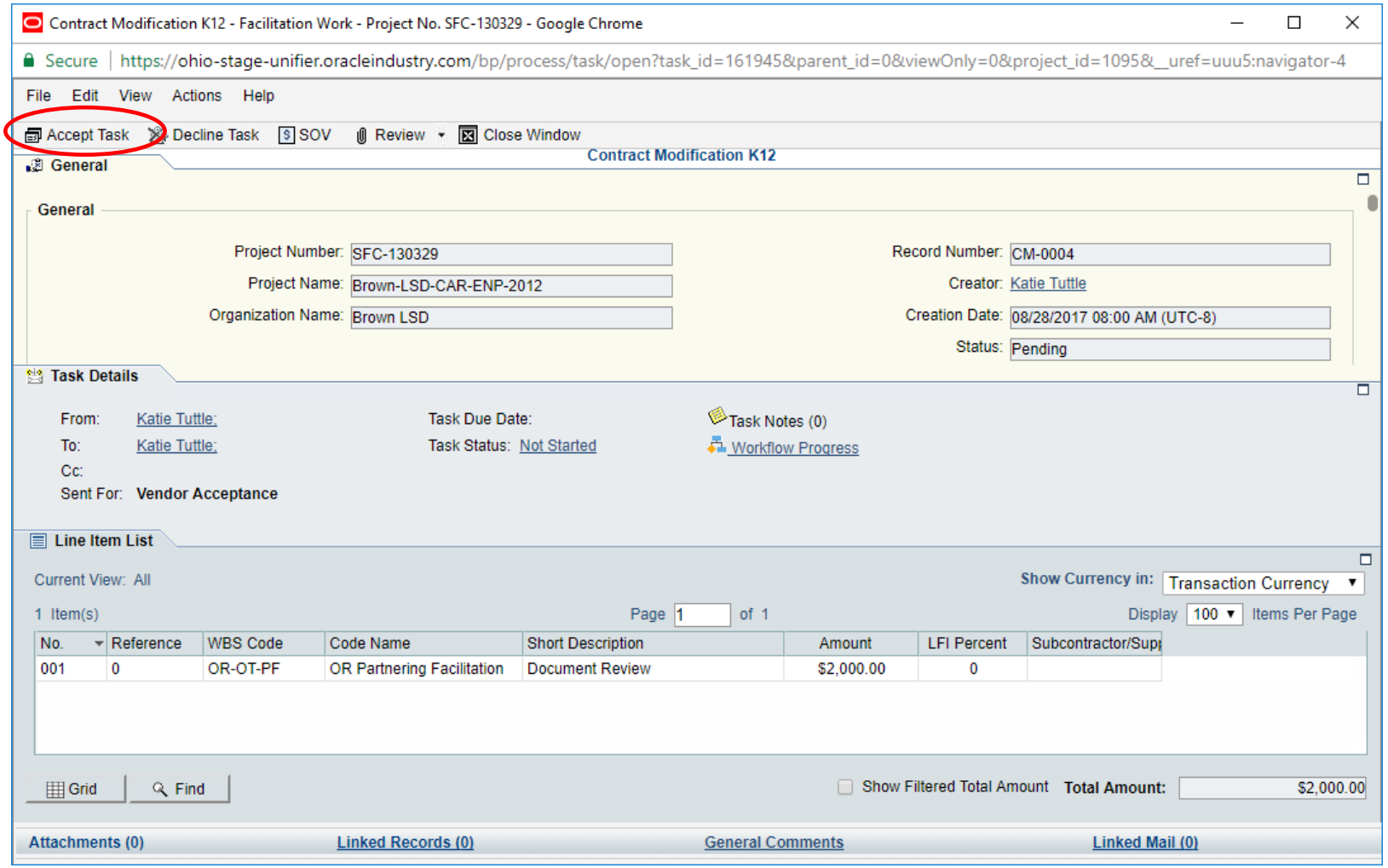
Facilitator Acceptance

- Facilitator will receive an email notifying them that they have a task to complete in OAKS CI
- Click the link provided to access your task



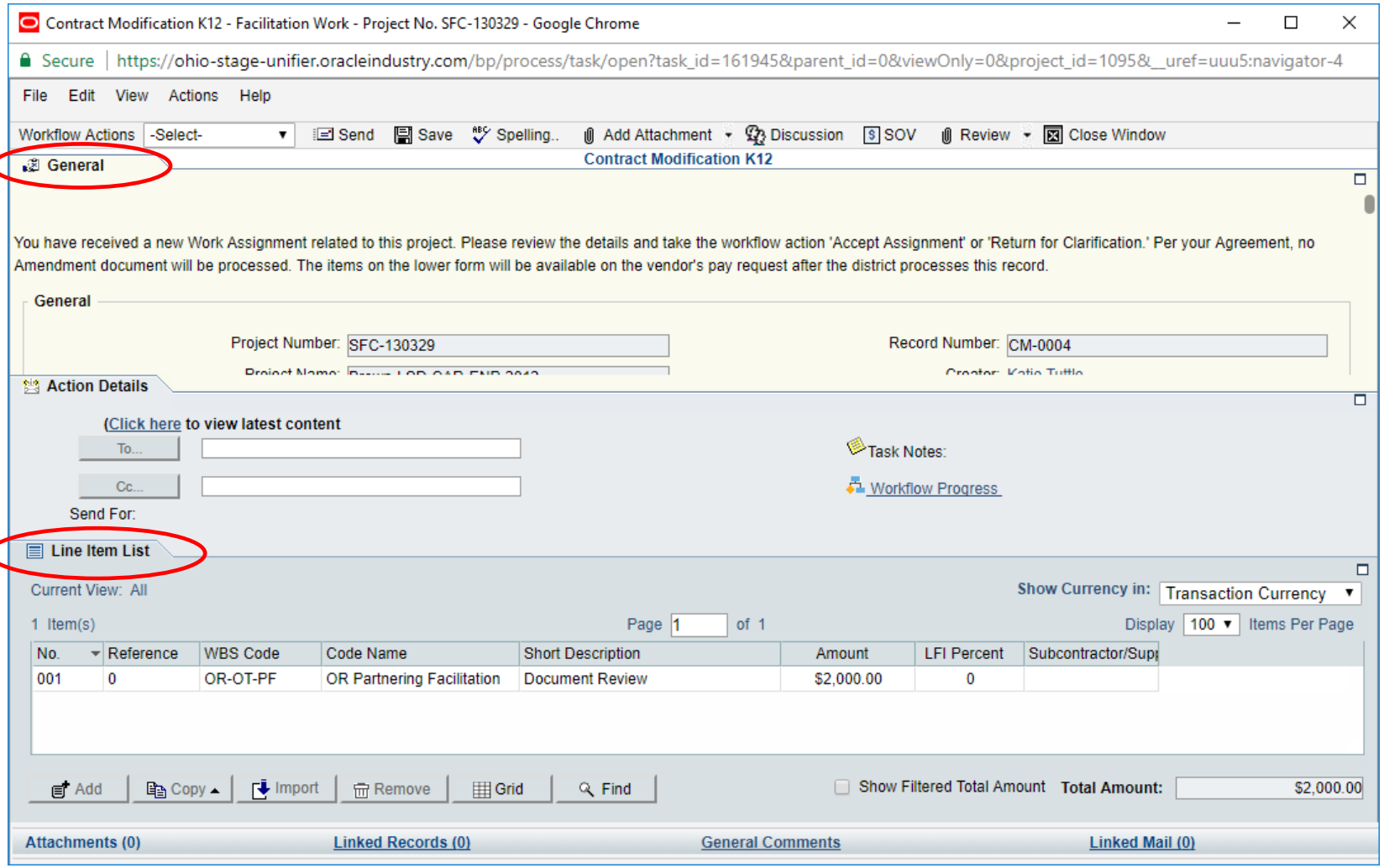
Facilitator Acceptance

- Click Accept Task to begin reviewing the Work Assignment



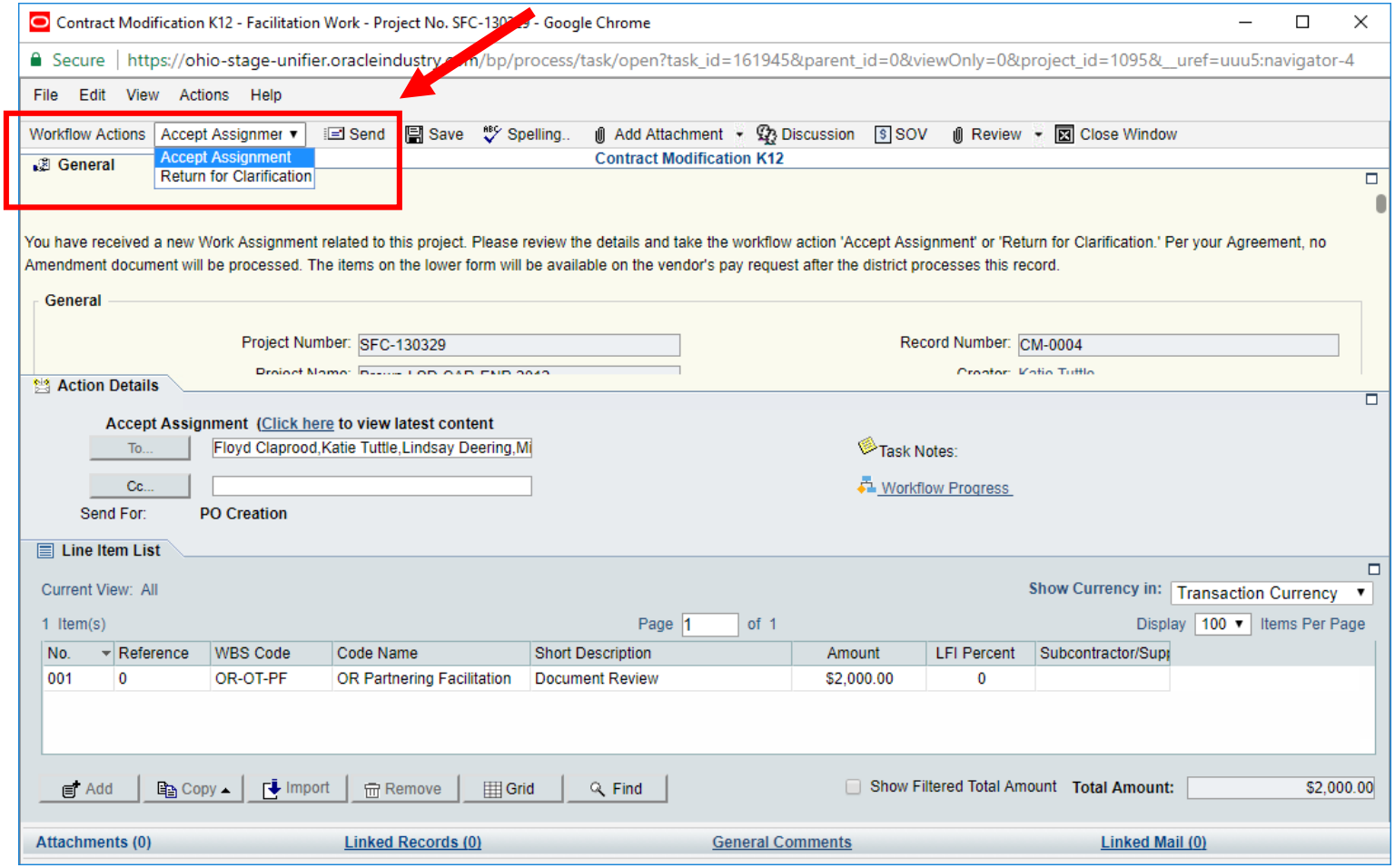
Facilitator Acceptance

- Review information in the General tab and Line Item List tab



Facilitator Acceptance

- Accept the record by choosing the Workflow Action: Accept Assignment. Record then goes to the District Treasurer for PO.
- Click Send



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211