



Training Descriptions

Training Session	Length	Audience	Topics Covered
Introduction to OAKS CI	1 hour	Any system user	<ul style="list-style-type: none"> – Basic navigation of OAKS CI – Working with tasks, notifications and drafts – Creating records in Logs – Working with Tasks – Using document manager (K12 Legacy and Agency)
Design Phase Training	3 hours	A/E	<ul style="list-style-type: none"> – Introduction to OAKS CI – Subcontractor/Supplier Declarations – Professional Service Amendments – Professional Services Pay Request – Design Reviews – Meeting Minutes
Construction Phase GC Training	3 hours	Contractor, A/E	<ul style="list-style-type: none"> – Introduction to OAKS CI – Subcontractor/Supplier Declarations – Contract SOV – Change Orders – Contractor Pay Request, including Certified Payroll – RFI – Submittals – Meeting Minutes
DB Training	3 hours	Design Build Team	<ul style="list-style-type: none"> – Introduction to OAKS CI – Subcontractor/Supplier Declarations – Contract SOV – GMP Amendment – GMP Subcontract Distribution – Change Orders – Contractor Pay Request, including Certified Payroll – Design Reviews – Submittals – RFI – Meeting Minutes
CMR Training	3 hours	CMR Team	<ul style="list-style-type: none"> – Introduction to OAKS CI – Subcontractor/Supplier Declarations – Contract SOV – GMP Amendment – GMP Subcontract Distribution – Change Orders – Contractor Pay Request, including Certified Payroll – Submittals – RFI – Meeting Minutes



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Training Session	Length	Audience	Topics Covered
School District Staff Training	2-3 hours	School District Staff	<ul style="list-style-type: none"> – School District Roles in OAKS CI – Introduction to OAKS CI – Recording Purchase Orders – Approving Pay Applications – Recording Vouchers and Applying to Application for Payment
Agency Owner Training	3 hours	Agency Owners and Owner Financial	<ul style="list-style-type: none"> – Introduction to OAKS CI – Recording Purchase Orders – Approving Pay Requests – Recording Vouchers and Applying to Pay Request
Consultant List Training	2-3 hours	Professional Service Providers on the Consultant List	<ul style="list-style-type: none"> – Introduction to OAKS CI – Info about Consultant List Projects – Professional Services Pay Requests