OAKS
Capital Improvements

Introduction to OAKS CI

March, 2020

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

Topics

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Click the Home button from any slide to return to this page

What does OAKS CI do for you?

- Tracks your project progress
- Automates workflows (based on Ohio Facilities Construction Commission forms and procedures)
- Allows for improved project communication and collaboration
- Housed in the Cloud so you can utilize any browsing tool to access (Chrome recommended)

System Navigation

Browser Information

- When using the OAKS CI system, we recommend using **Google Chrome** or **Mozilla Firefox**. These browsers will give you the best user experience in the system.

Navigate to OAKS CI

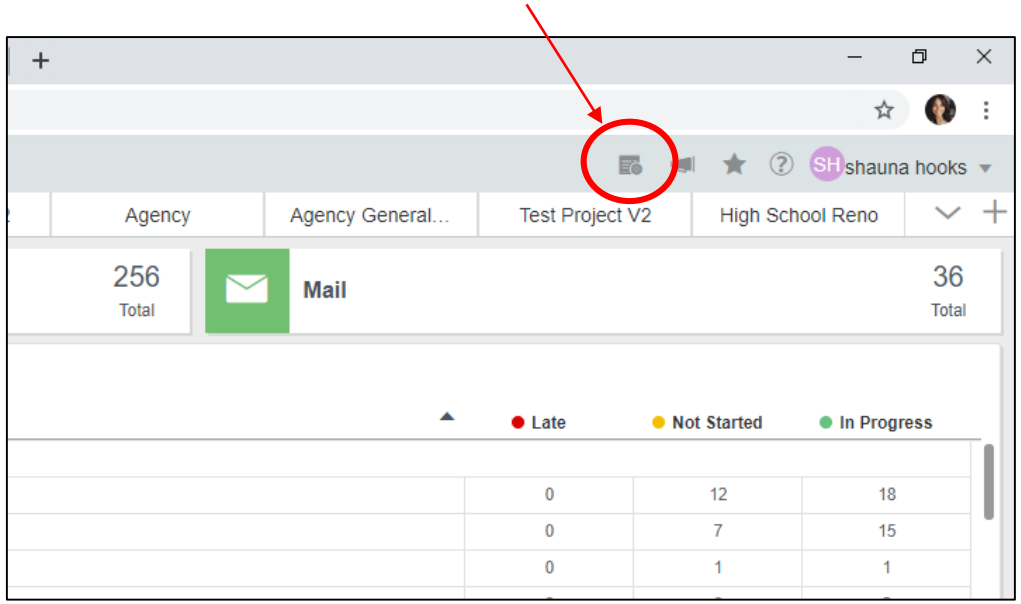
- Navigate to this URL: https://ohio-unifier.oracleindustry.com/bluedoor
- Enter your assigned Username and Password
- Click “Sign In”

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

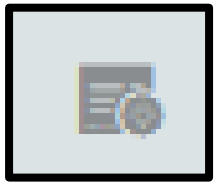
Important Notice – View Changes

OAKS CI currently has the ability to switch between two different views. Once this functionality is removed, only the New UI View will available (see next slide).

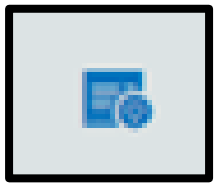
Currently you can switch between views with the button near the top right of your OAKS CI screen. When clicked, your view will toggle between the **Standard View** and **New UI View**.



Not every page will look different when you change views. Look at the color of the button to determine which view you are currently in:



If the button is gray, the **Standard View** is being displayed



If the button is blue, the **New UI View** is being displayed

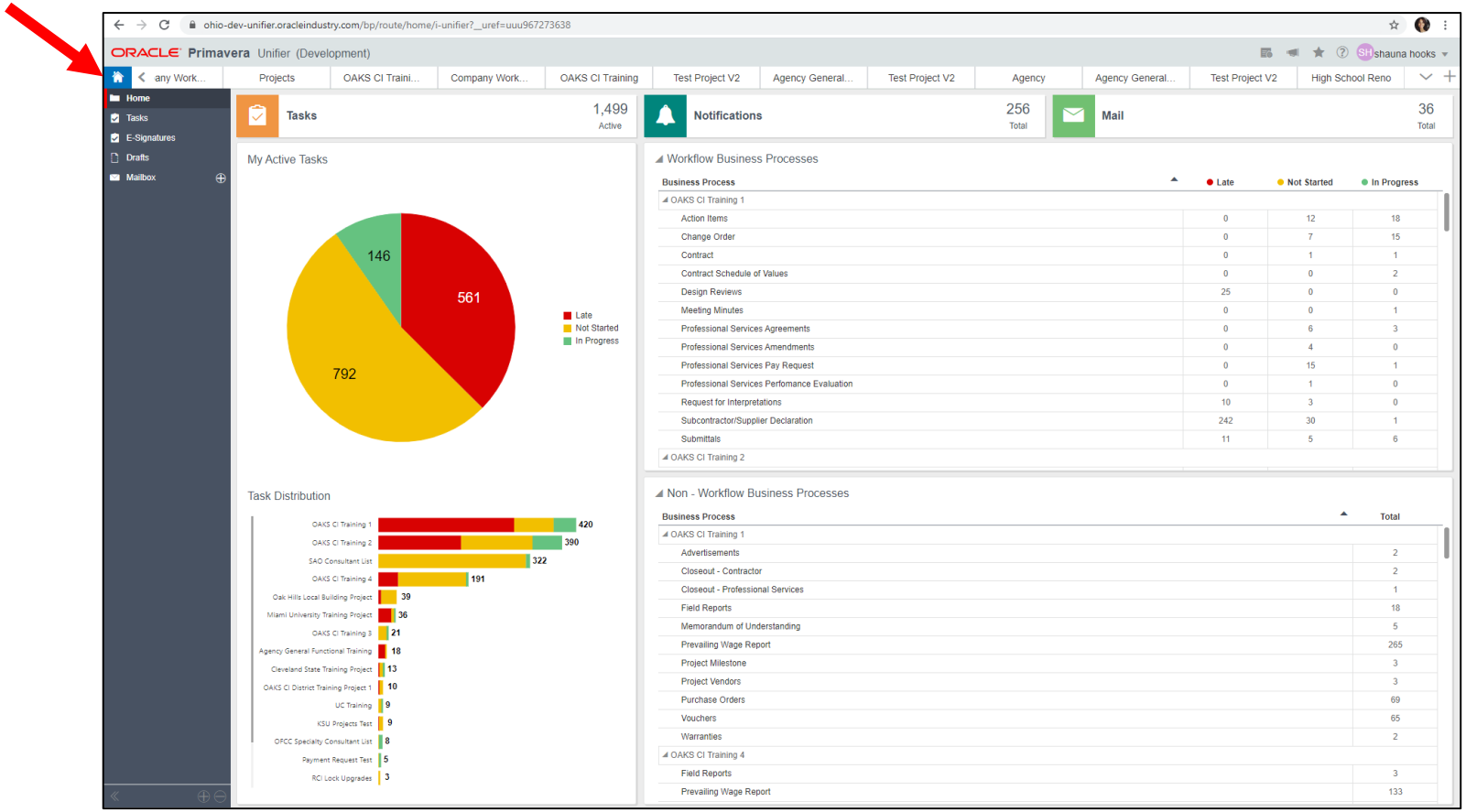
New User Interface (UI) View

OAKS CI will soon be changing from the Standard View to the New UI View permanently

- After this change occurs, you will no longer be able to toggle between views
- Some steps and screen images will be different depending on the view
- When different, the following slides will show screenshots and steps for the **Current View** and **New View**

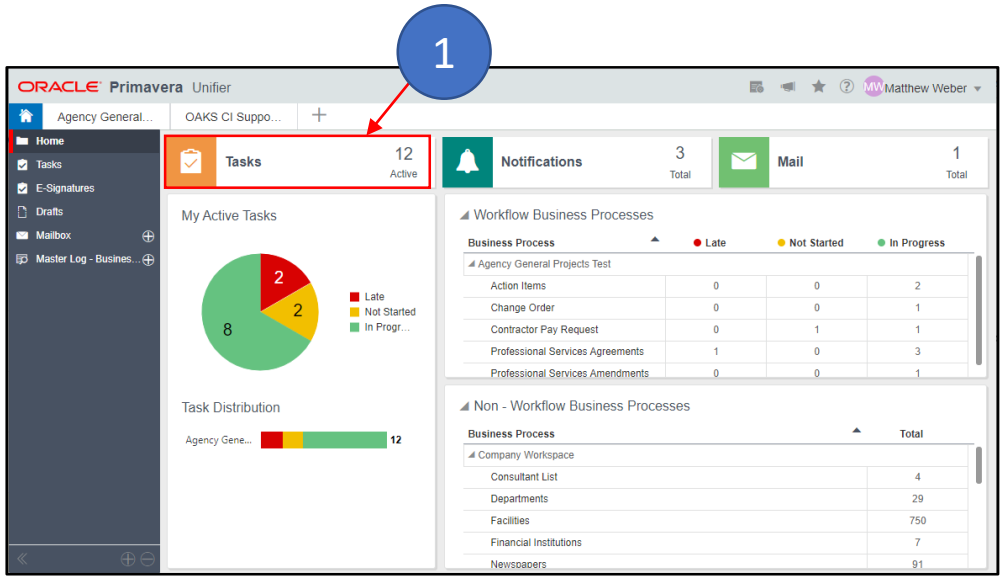
Home Page

- The Home button is located on the left-hand side of screen
- Your Home Page allows you to see all tasks for any of your projects

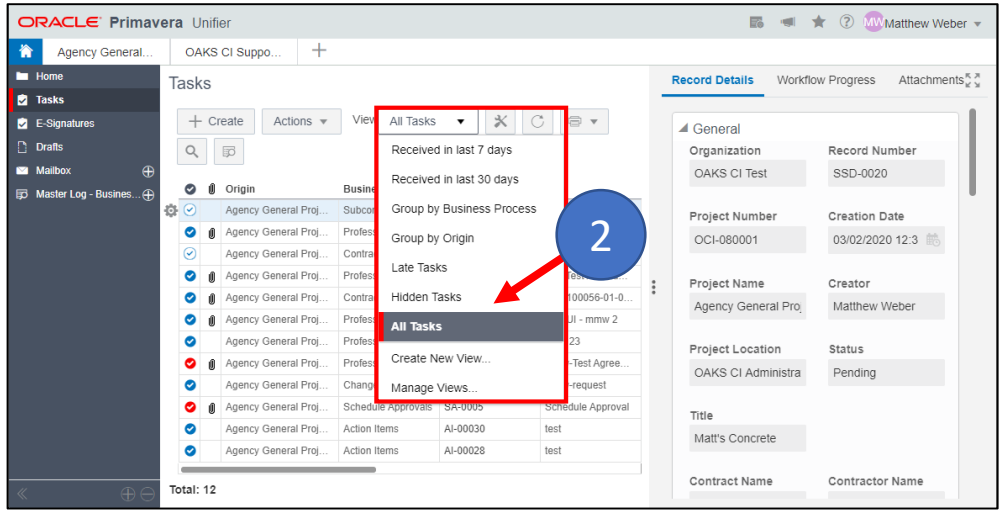


Home Page – Tasks

1. From the Home Page, you can click on Tasks to view tasks for all projects

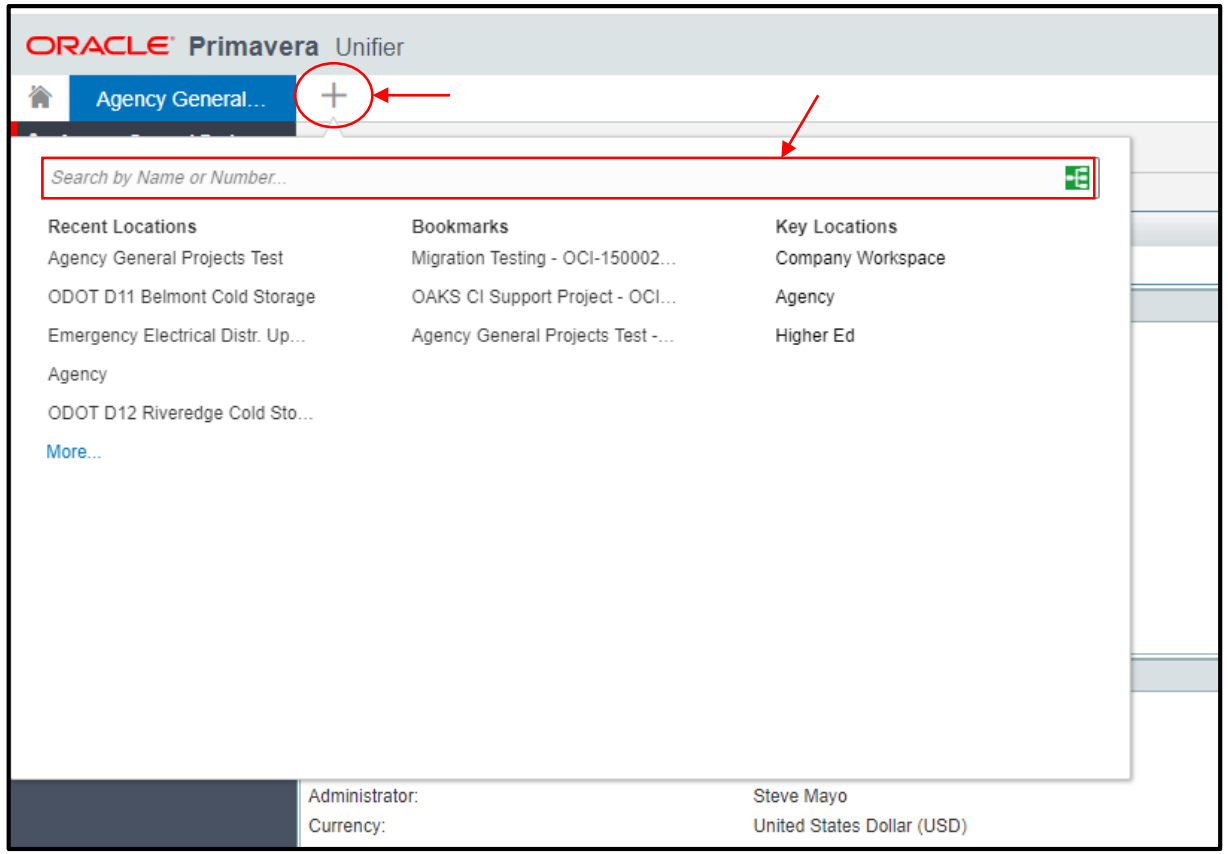


2. Note: Your default view shows "Received in the last 7 days". Change this view to **"All Tasks"** and that will remain your default for all projects.



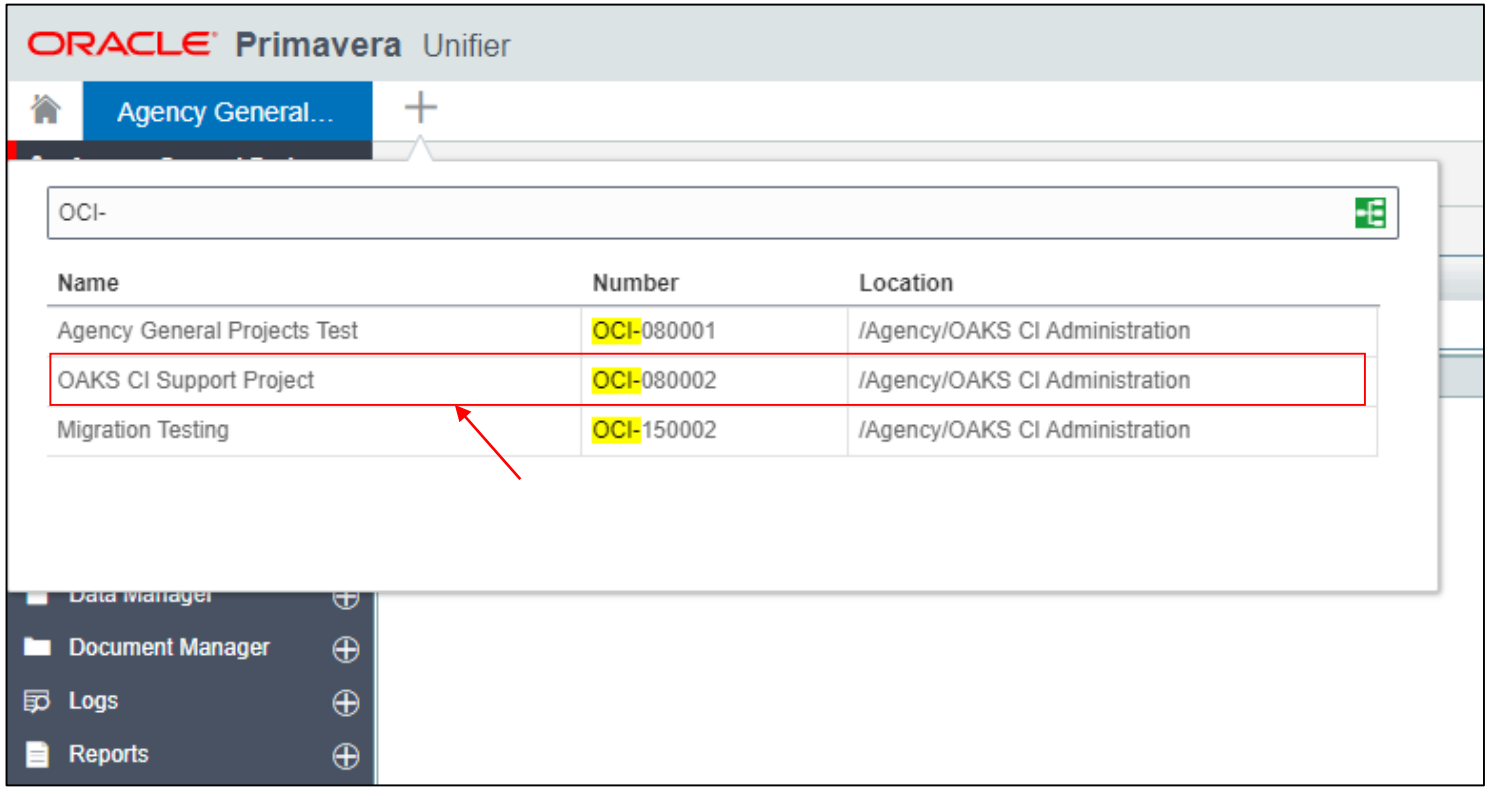
Find your Project

- To locate your project, click on the + sign to the right of the home or project tabs
- In the secondary screen you will see a search box, a list of Recent Locations, Bookmarks, and Key Locations
- Click inside the search box



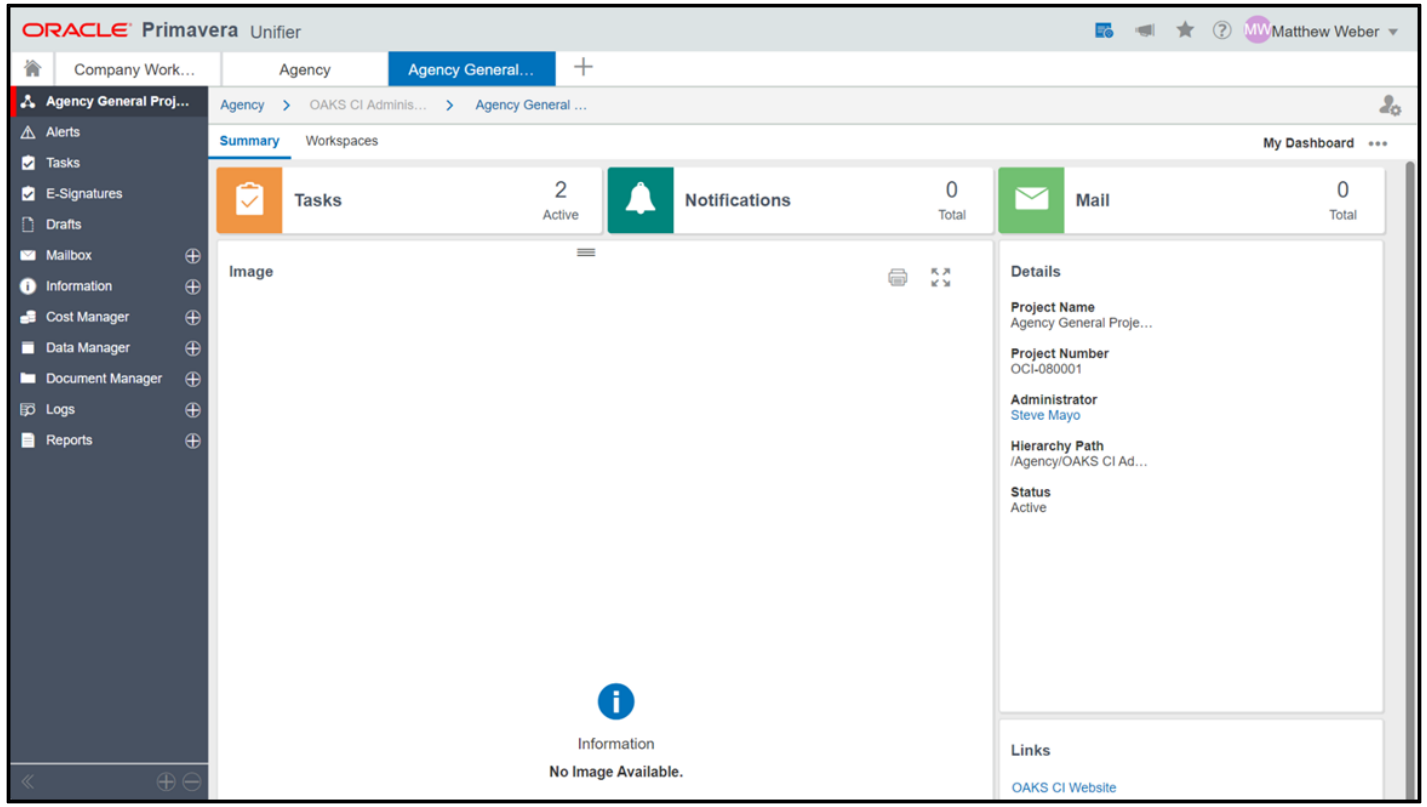
Find your Project

- Type the name or number of the project you are searching for
- The results will begin to auto-populate as you type
- Click on your project from the list to open it



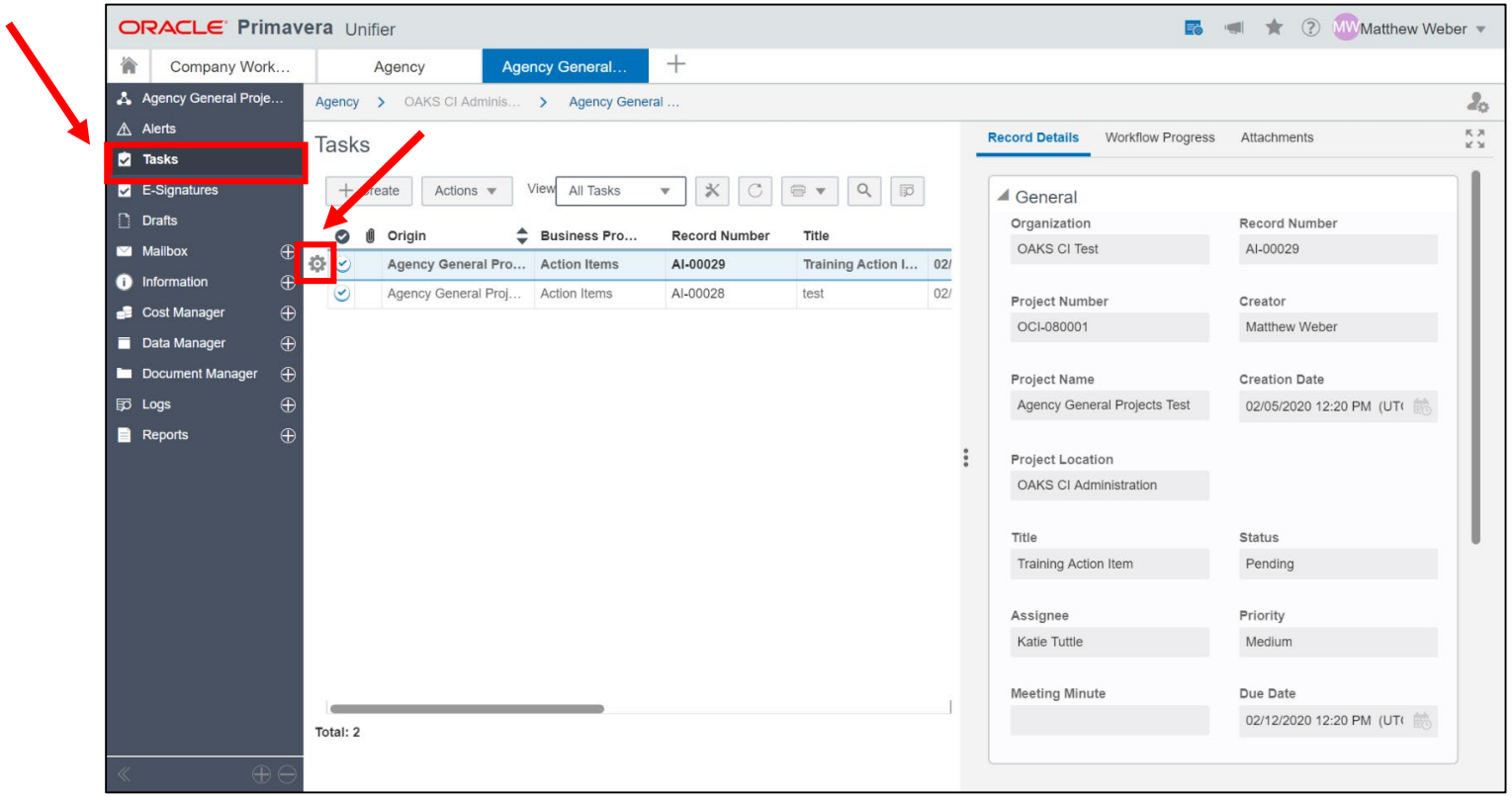
Project Home Page

- From your Project Home Page, you can navigate to your work and information
- In the Main Menu, you will see: **Tasks, Mailbox, Drafts, Document Manager, and Logs** (most of your work will be completed in **Tasks** and **Logs**)



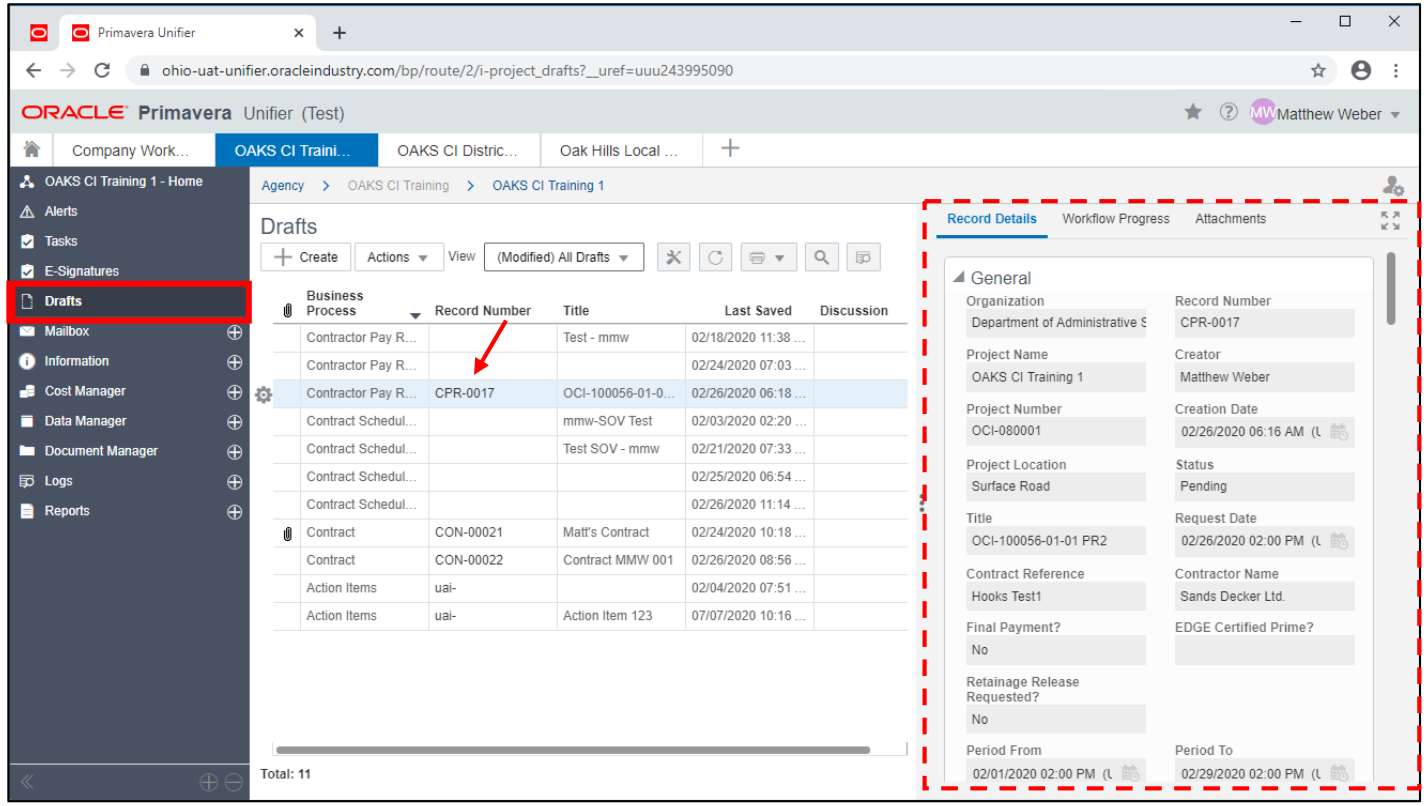
Tasks (Your Work)

- Tasks are records that come to you for your review or approval
- Use the gear icon or **double-click** the Task to open it



Drafts

- Drafts are any unfinished records that you have created and saved for later
- Click any record to preview the details in the right pane
- You can delete any drafts you no longer need



Drafts and Timeout

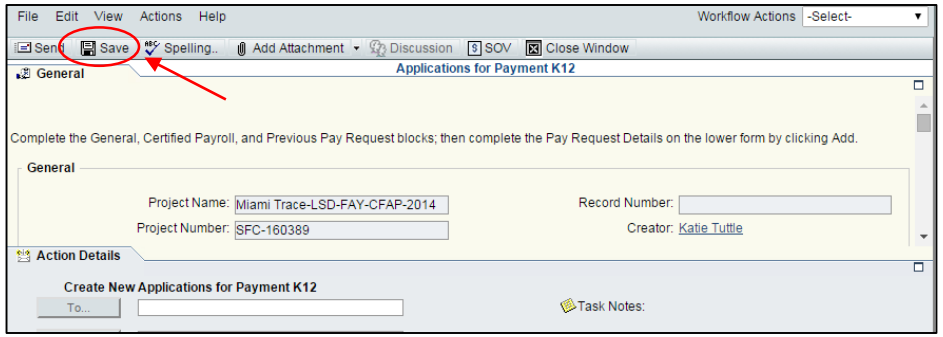
OAKS CI times out after 60 Minutes of Inactivity

- All unsaved work will be lost
- No warning will be given
- Use the **Save** button to save your 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.

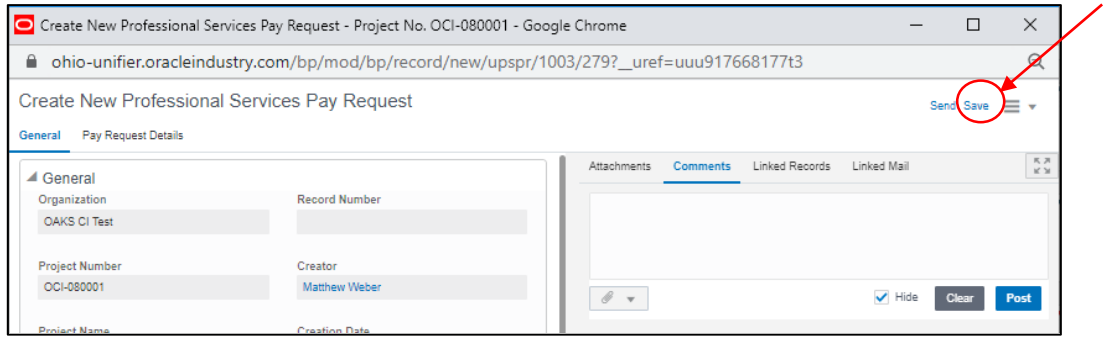
Old View:

Save is found at the top left of the record



New View:

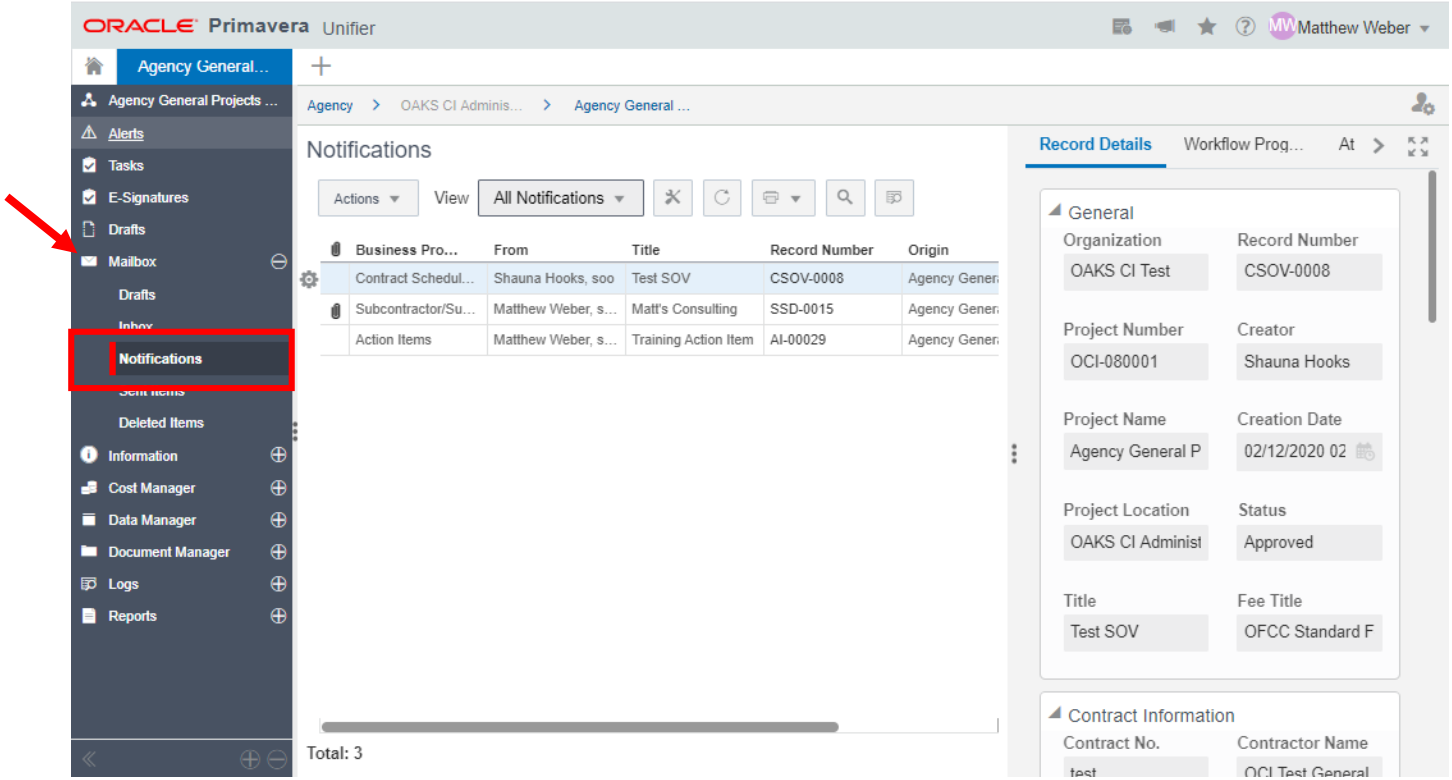
Save is found at the top right of the record



Mailbox – Notifications

Within your Mailbox you will find Notifications

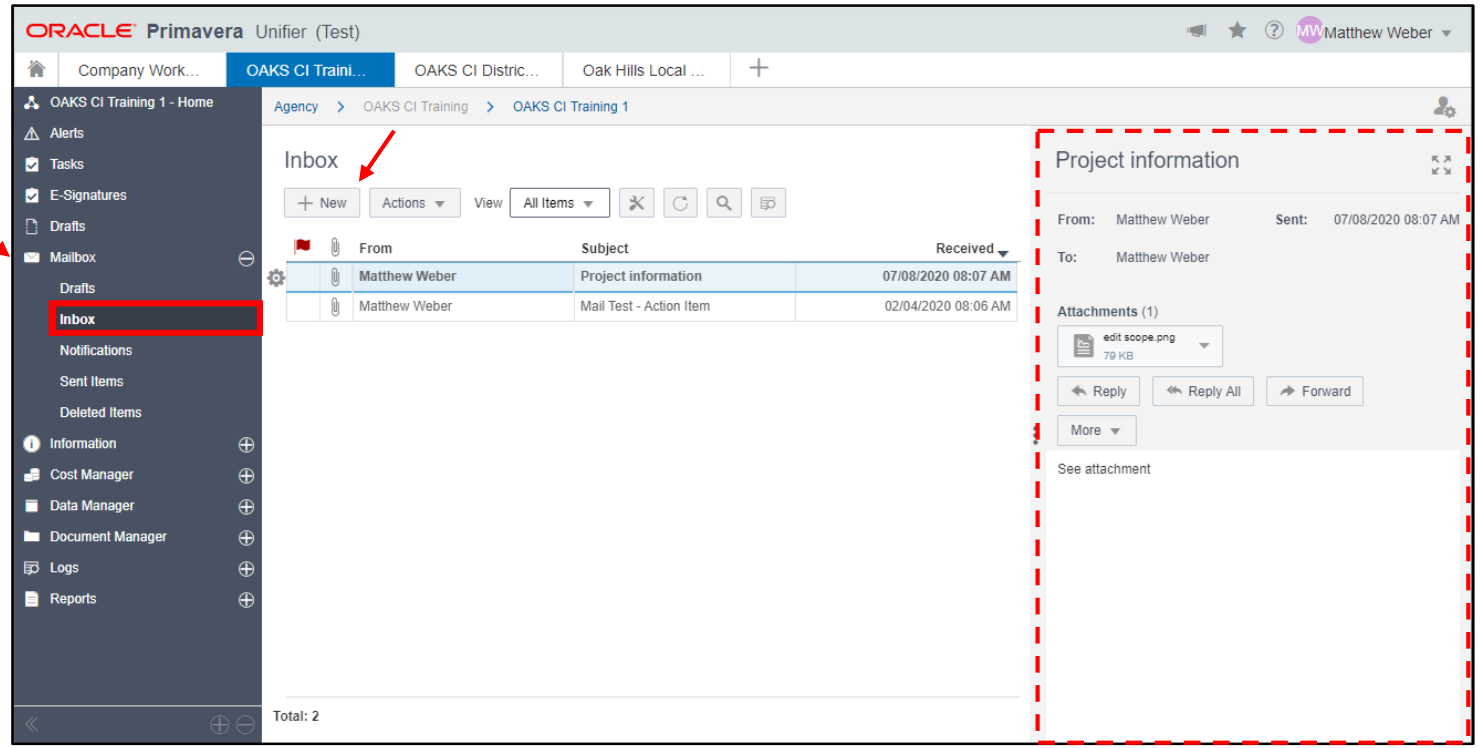
- Notifications are any records that you have been carbon copied on
- You can delete them if you choose
- **Meeting Minutes will always be a Notification**



Mailbox – Inbox

Within your Mailbox you will also find your Inbox

- You can create and send a new message from your Inbox
- You can view the full message by double clicking the record, or view the selected message in the right pane



Document Manager Uploading

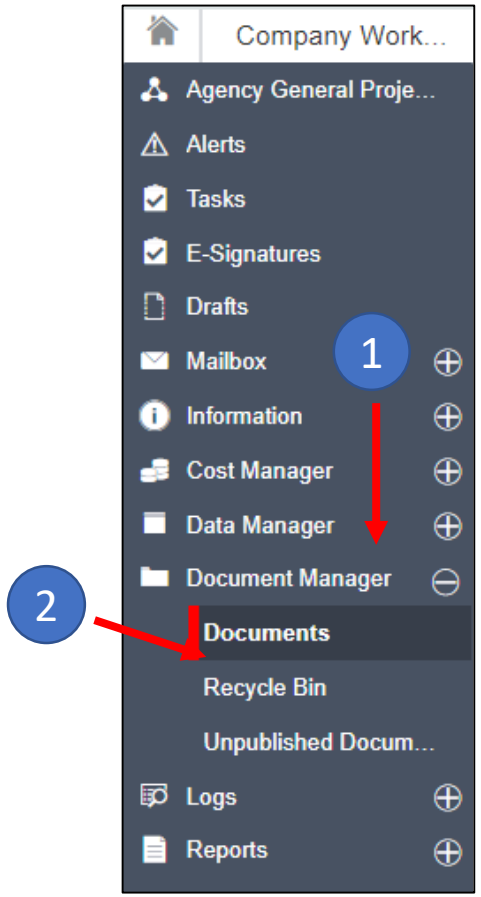
About Document Manager

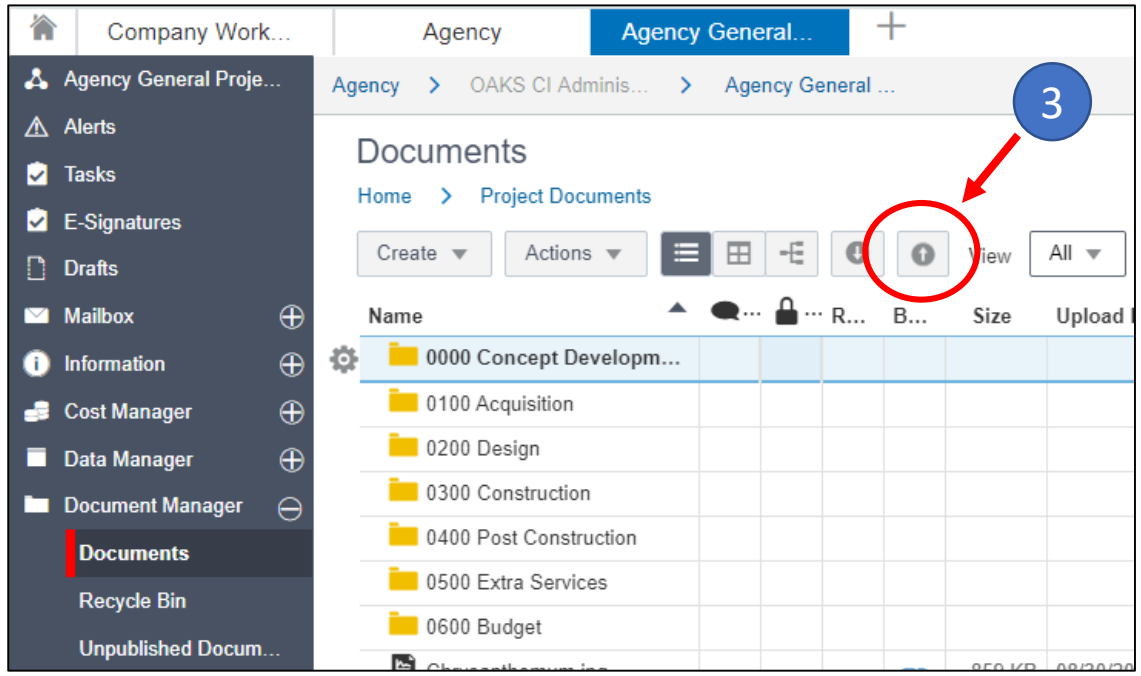
* ***If you are a School District Project user, you may or may not utilize Document Manager. Please follow up with your Project Manager for guidance.***

- Document Manager houses all your supporting documentation
- All documents must be uploaded into Document Manager **first** before they can be attached to a record
- Provides a platform for maintaining a wide variety of files and documents
- Ensures that project participants are always working on the most current versions
- Provides ready access to all documents from anywhere at any time

Document Upload

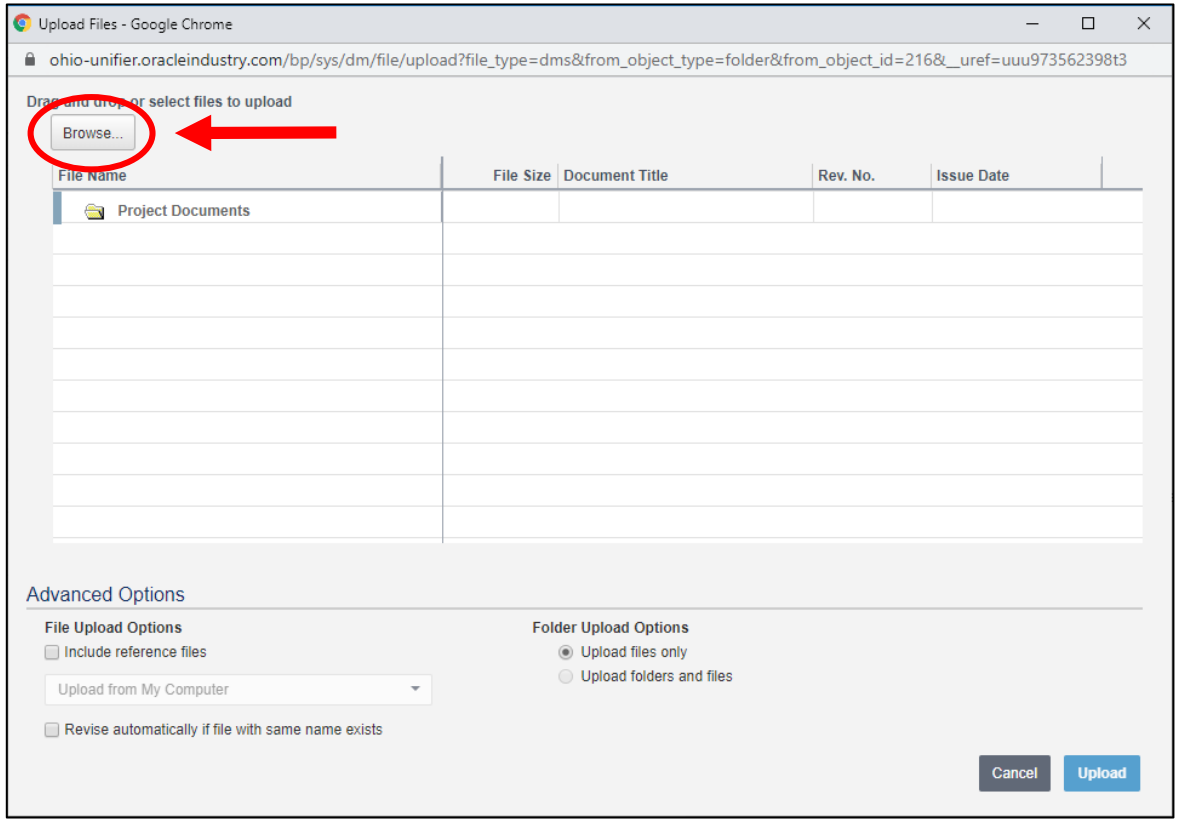
1. Navigate to Document Manager
2. Click on Documents
3. Click the **Upload Arrow button**





File Upload Window

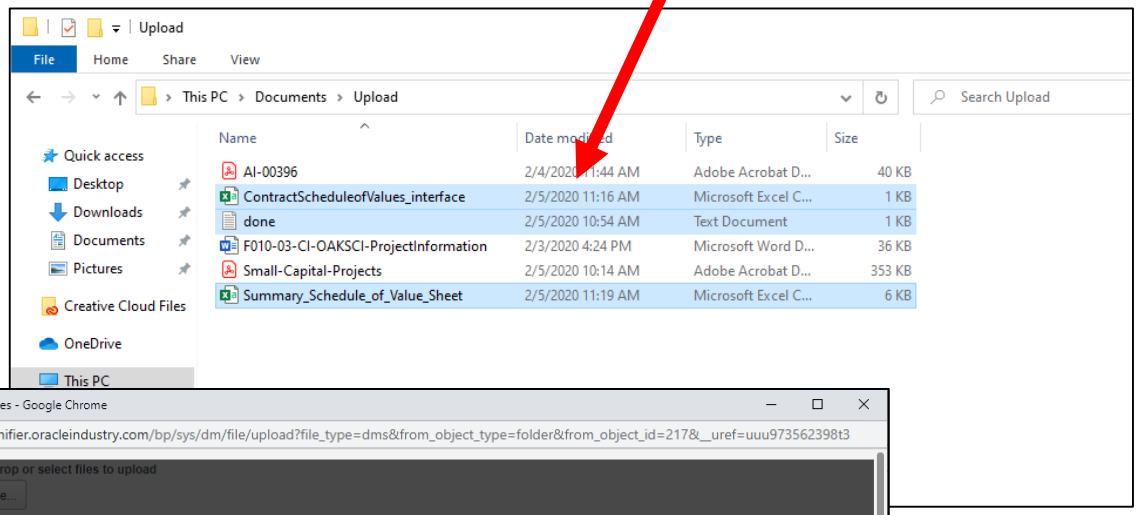
- A new window will appear for you to add files
- Click **Browse** to choose files for upload



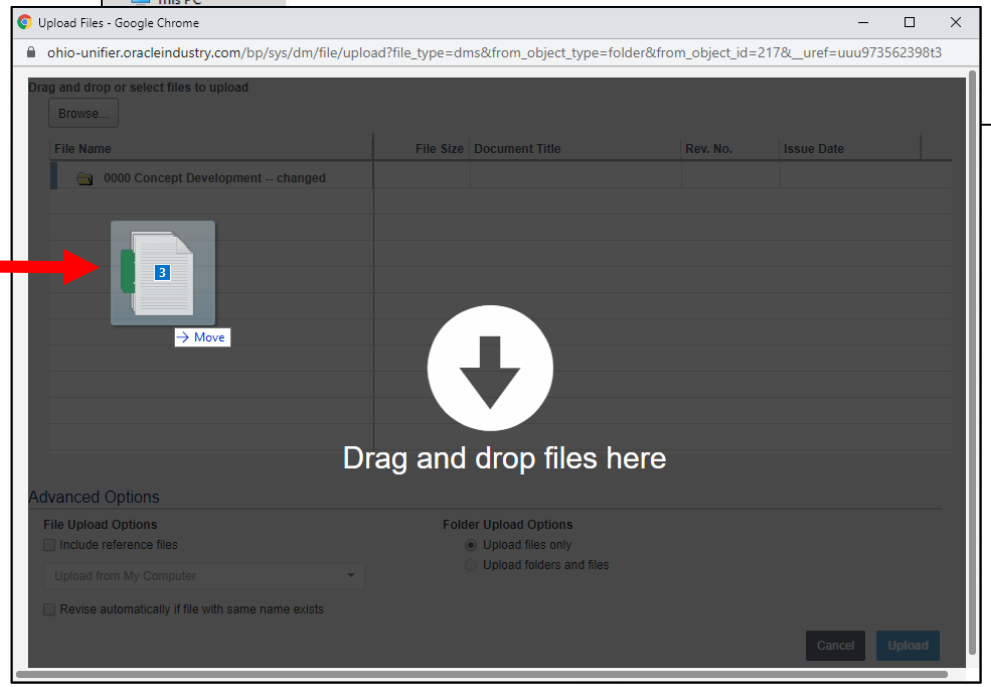
Drag and Drop files

- Find the document(s) your computer you want to upload
- Drag and Drop the documents into the Upload Files window

Choose your folder of Documents or Select Multiple Documents

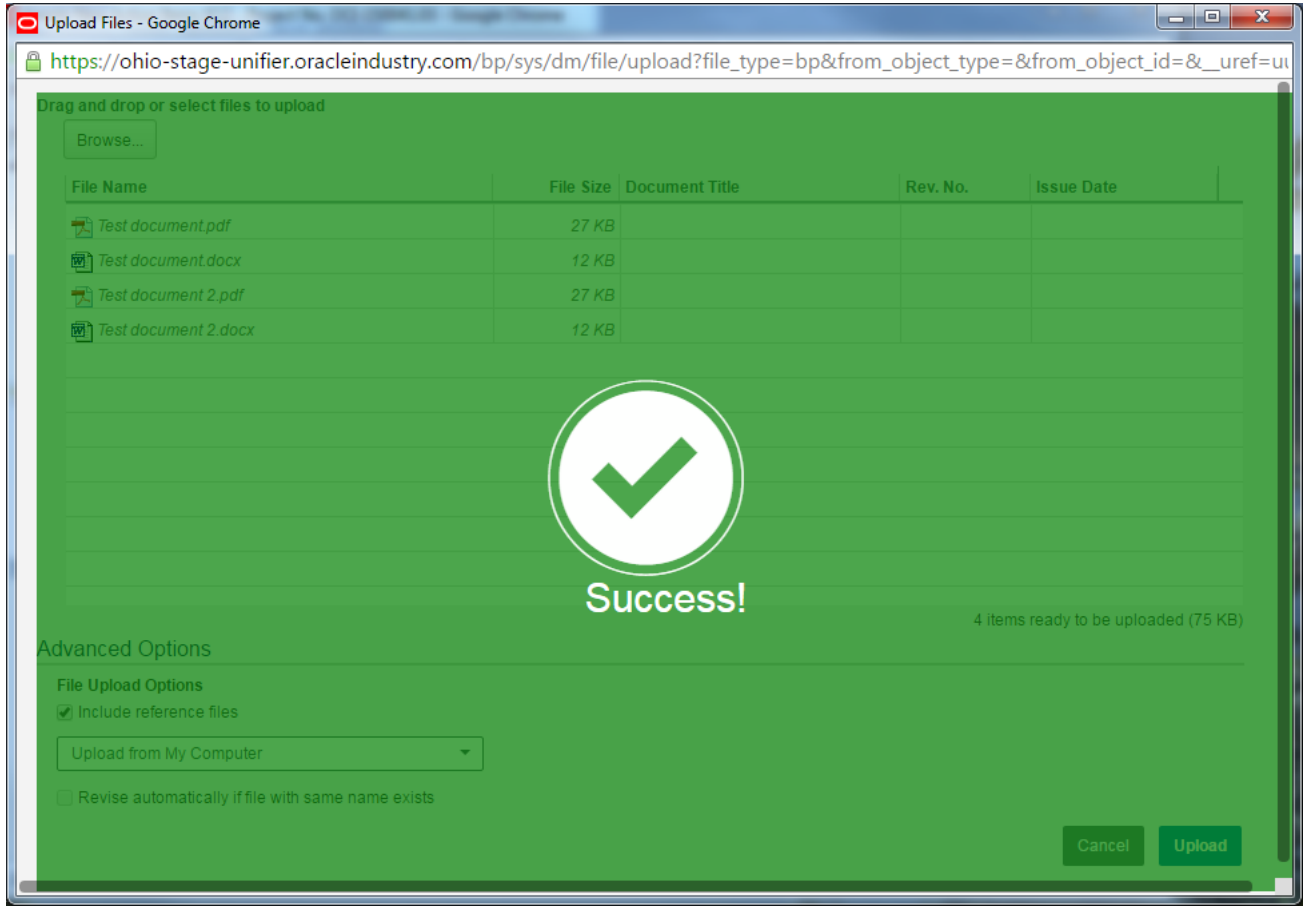


Drag and Drop the documents into the Upload Files window



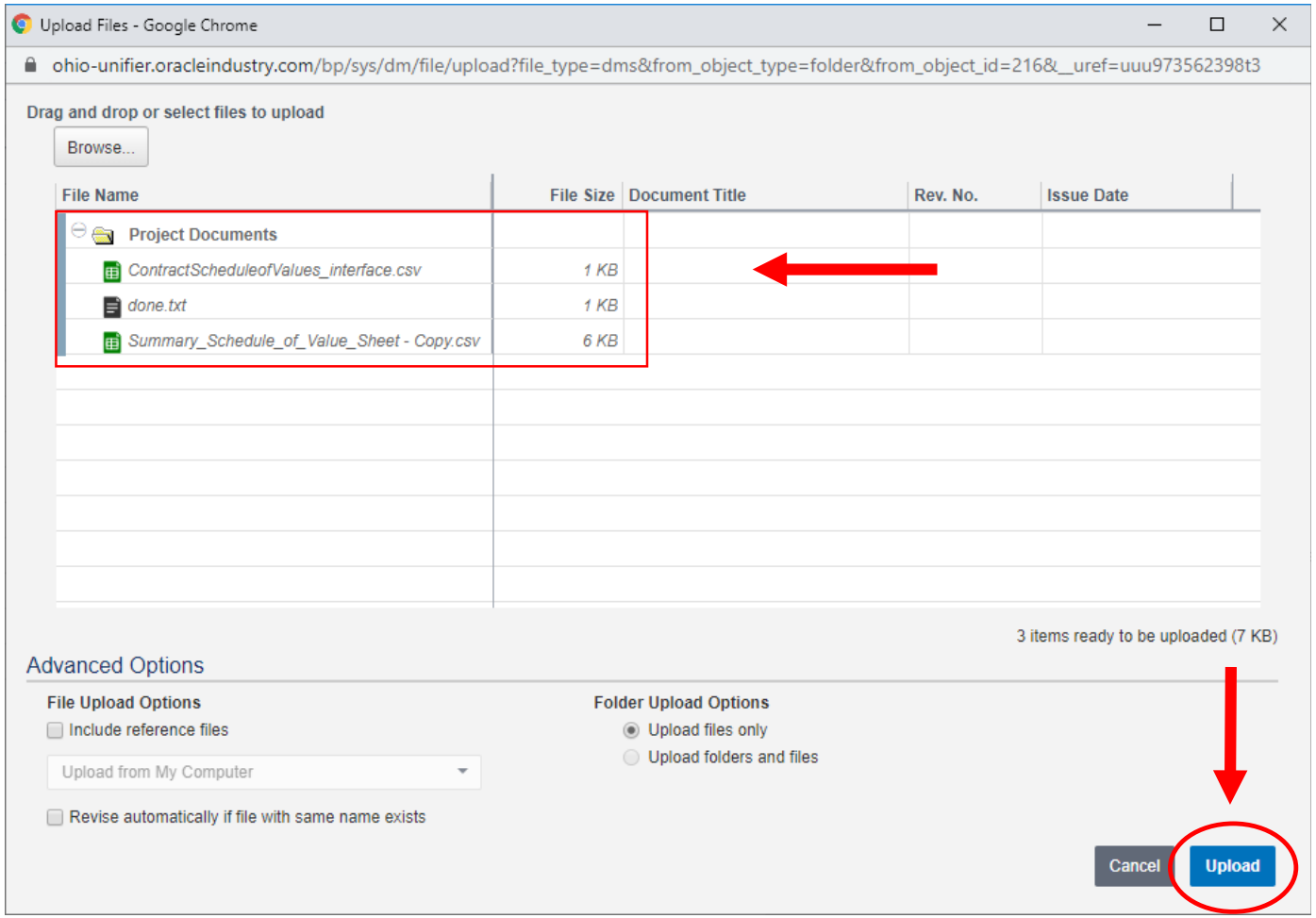
Adding Documents

- If all folders and files have been added, you will see a green “Success!” screen



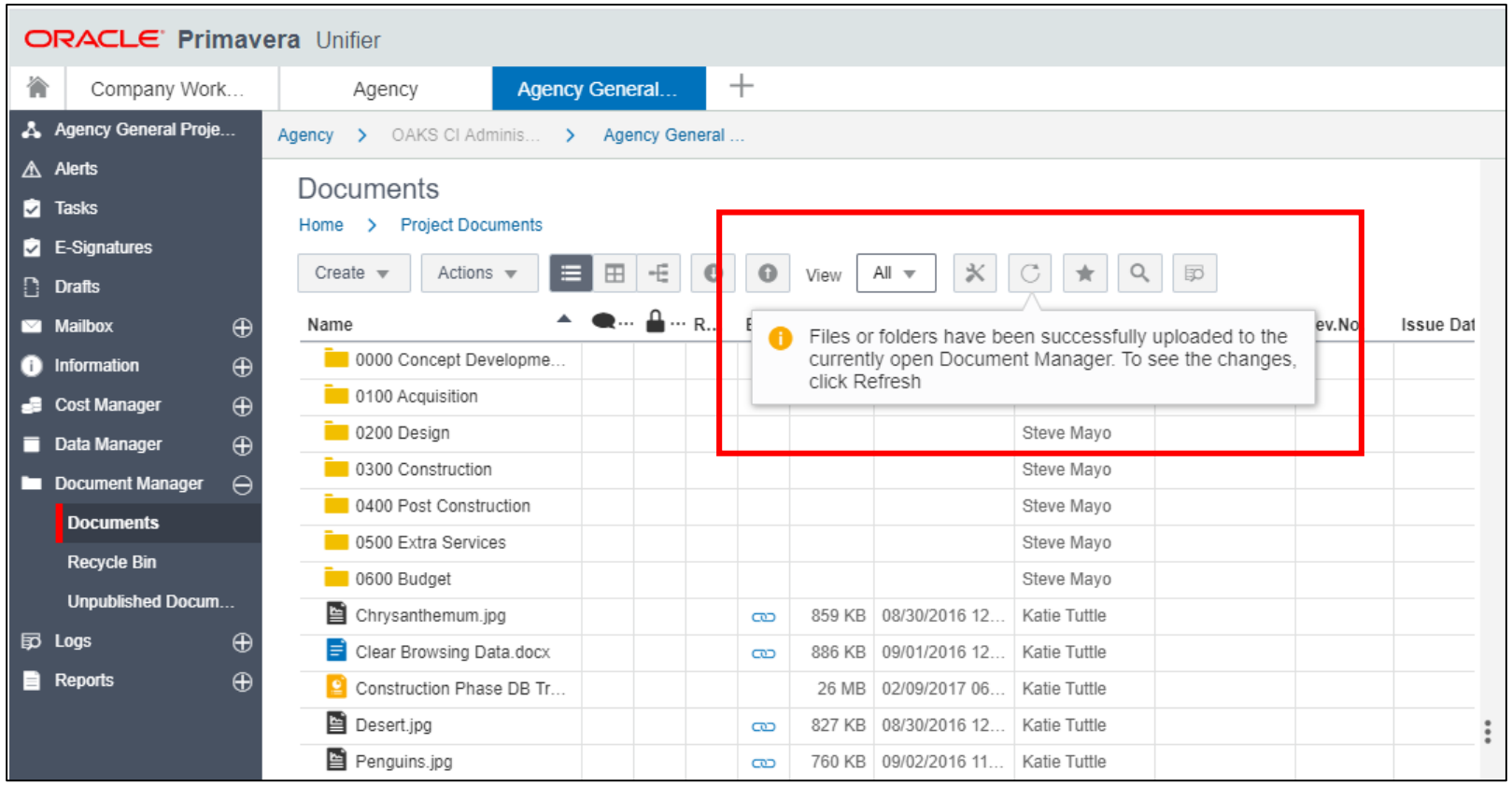
Upload Documents

- You should see all your documents in the Upload Files window
- Click **Upload** button



View Documents

- The window will close, and you will receive a message that your files have been uploaded
- Click the **Refresh** button to see the new files

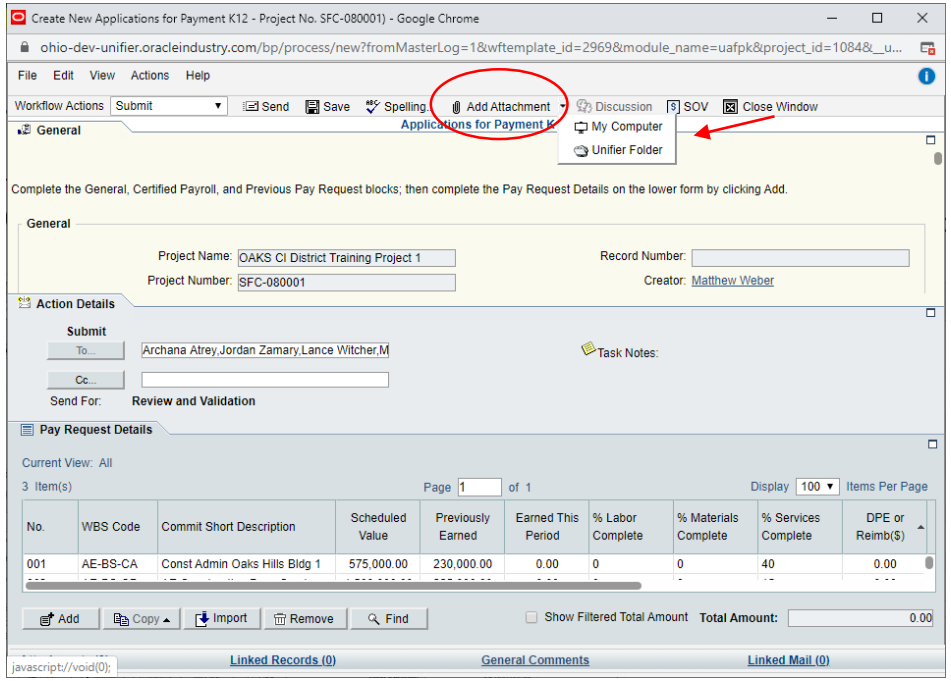


Attaching Documents to Records

Attach Documents to your Record

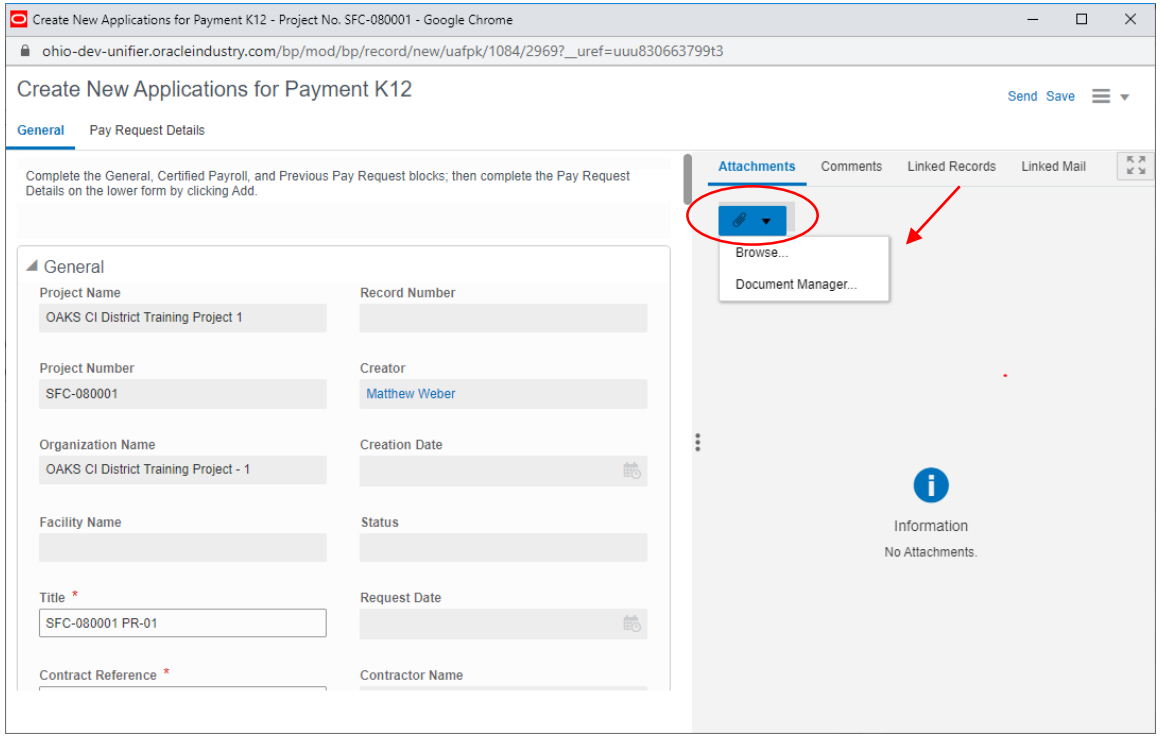
Current View:

- To attach documents to your record, click **Add Attachment** and choose either **My Computer** or **Unifier Folder**



New View:

- To attach documents to your record, click the attachment button and select either **Browse** to select a file from your computer or **Document Manager**

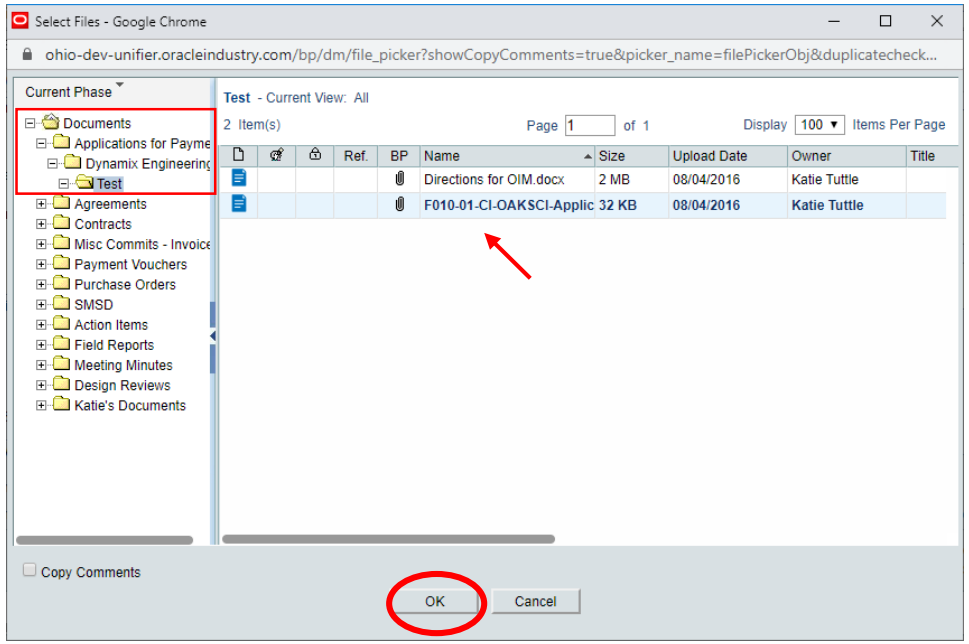


Attach Documents to your Record

- If you choose to attach a file from your computer, follow the directions starting from the File Upload section
- If you choose to attach a file from the Unifier Folder / Document Manager, follow these steps:

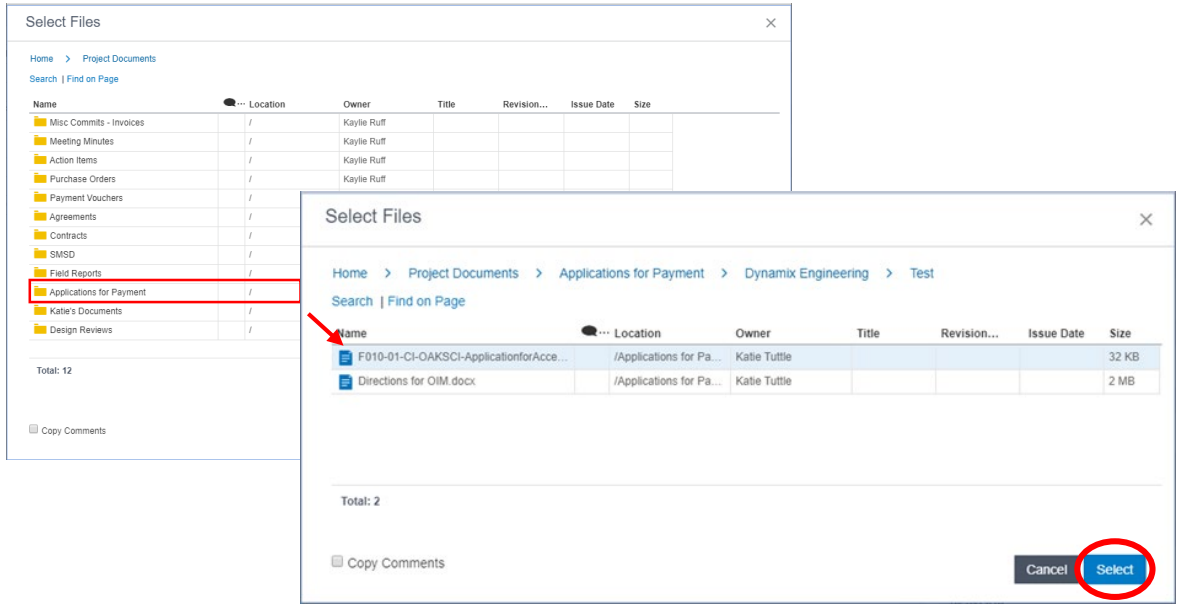
Current View:

- Choose the folder where your documents are saved
- Select your document on the right
- Click OK



New View:

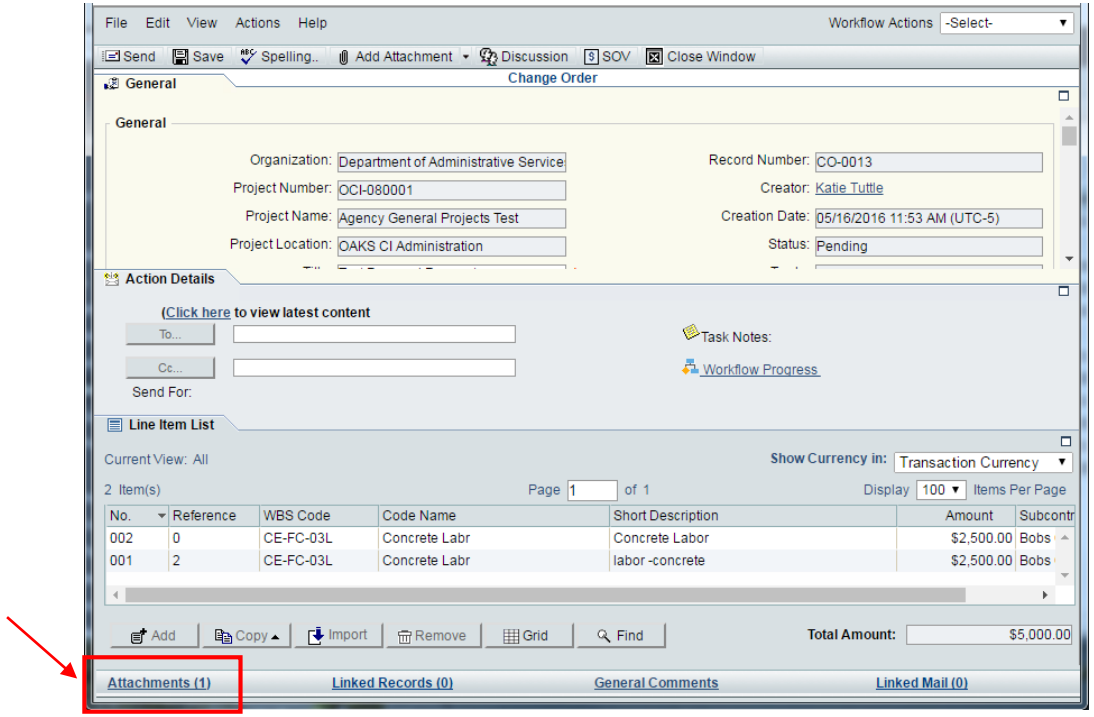
- Choose the folder (double click) where your documents are saved
- Select your document
- Click Select



View Attachments

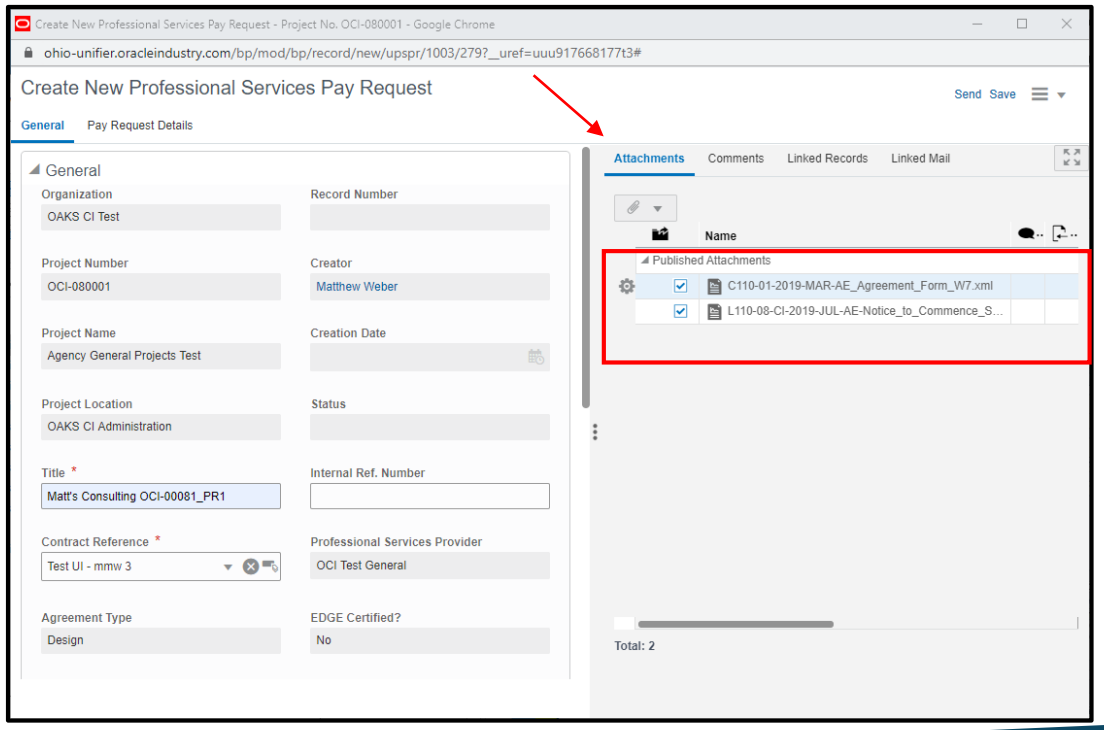
Current View:

- You can view the attachments at the bottom of your record



New View:

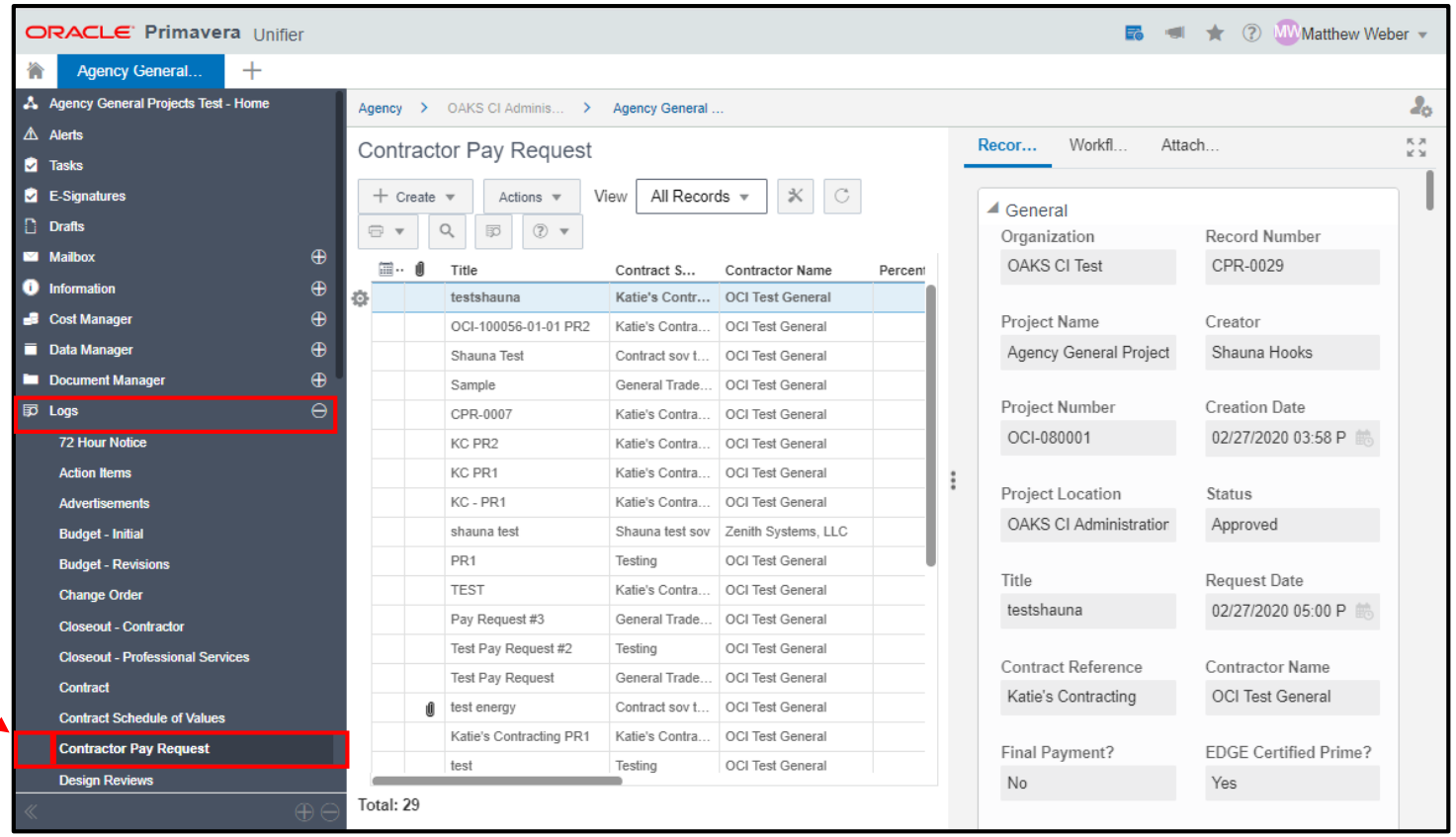
- Added attachments will now display in the right pane under the Attachments tab



Working in Logs

Logs

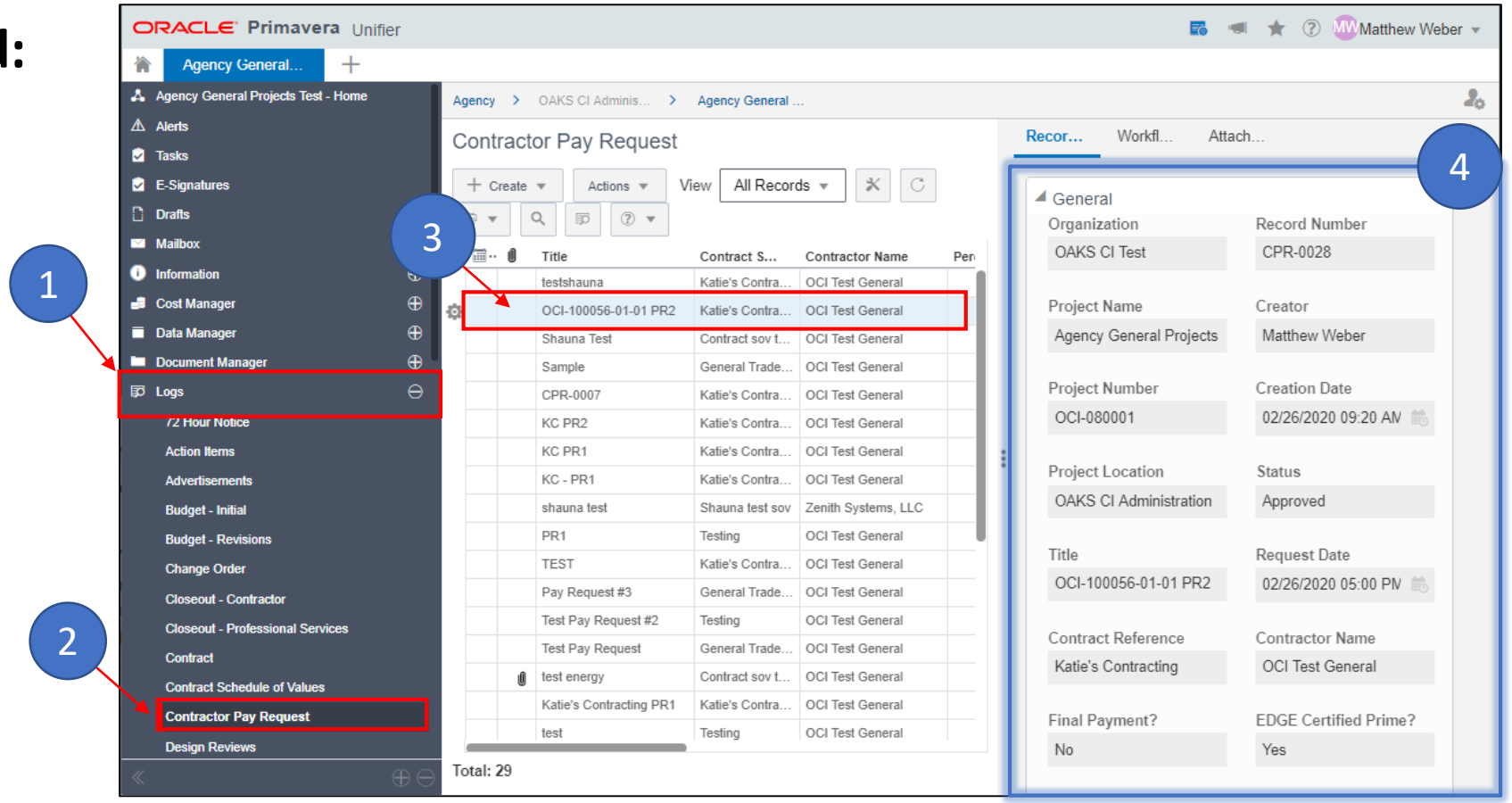
- **Logs** houses All Records for your project
- Click **Logs** in the dark gray menu to the left to show the different record types
- Select the record type you wish to view (ex: Contractor Pay Request)



Logs – View Record Details

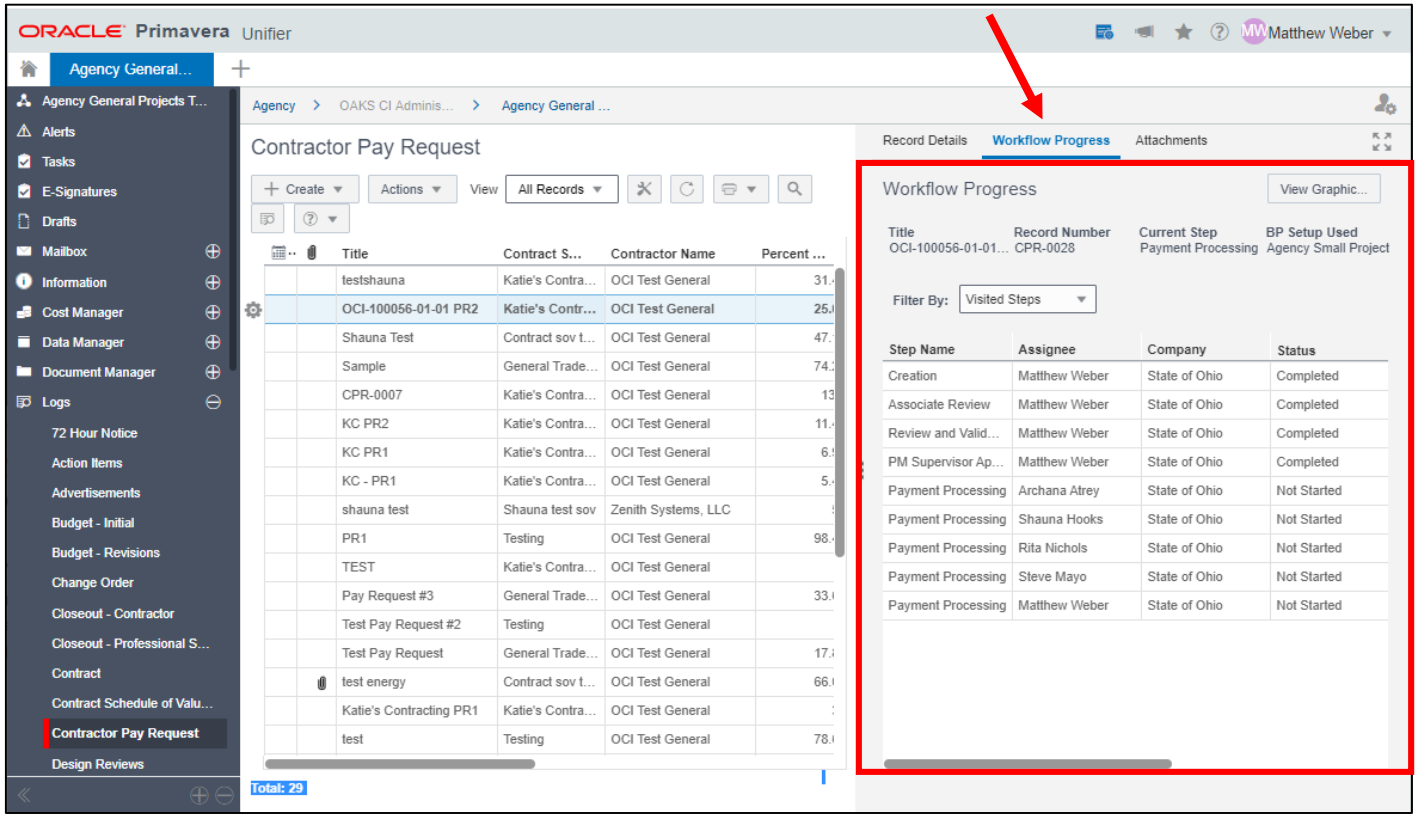
To view a specific record:

1. Click Logs to expand
2. Click the Record type that you wish to view
3. Click the specific Record you wish to view
4. The details of selected Record will populate to the right



Workflow Progress

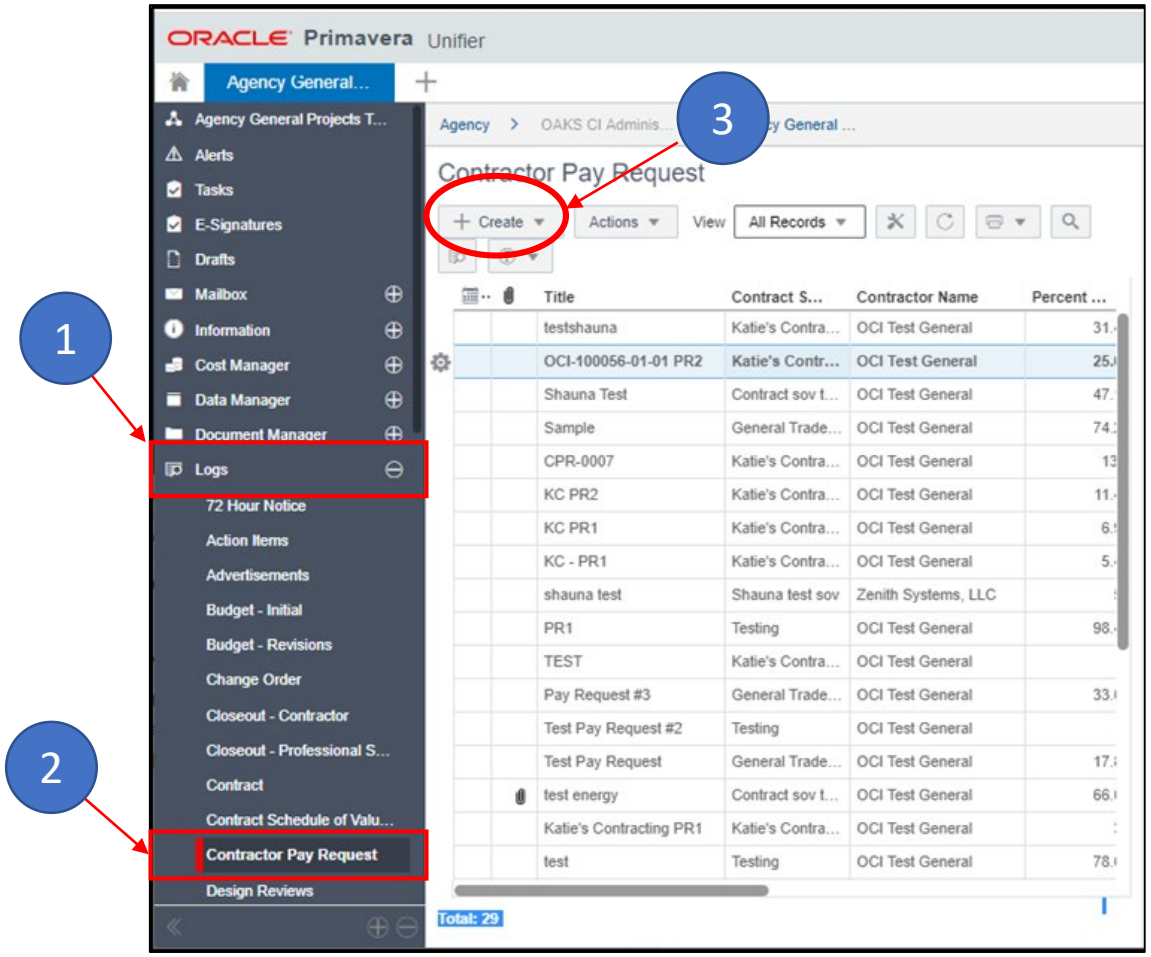
- Click “Workflow Progress” in the preview screen to view the step-by-step information about this record



Create a New Record In Logs

Create a New Record

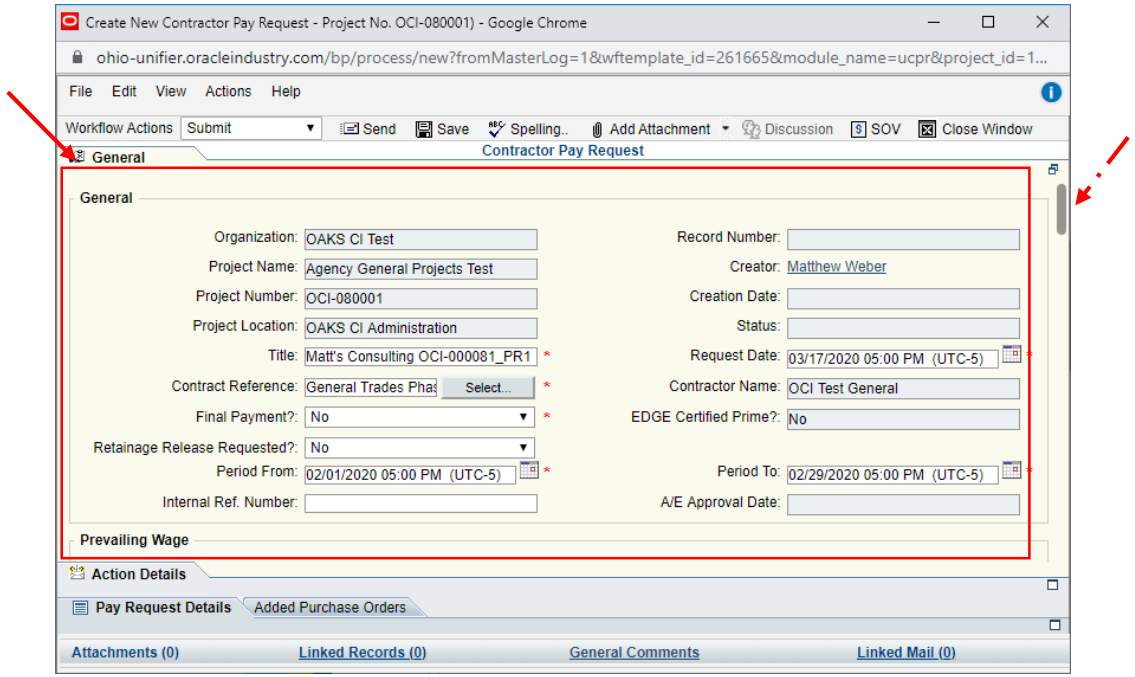
1. Click **Logs**
2. Select the appropriate **Record** type
3. Click the **Create** button



Add Information to the Record

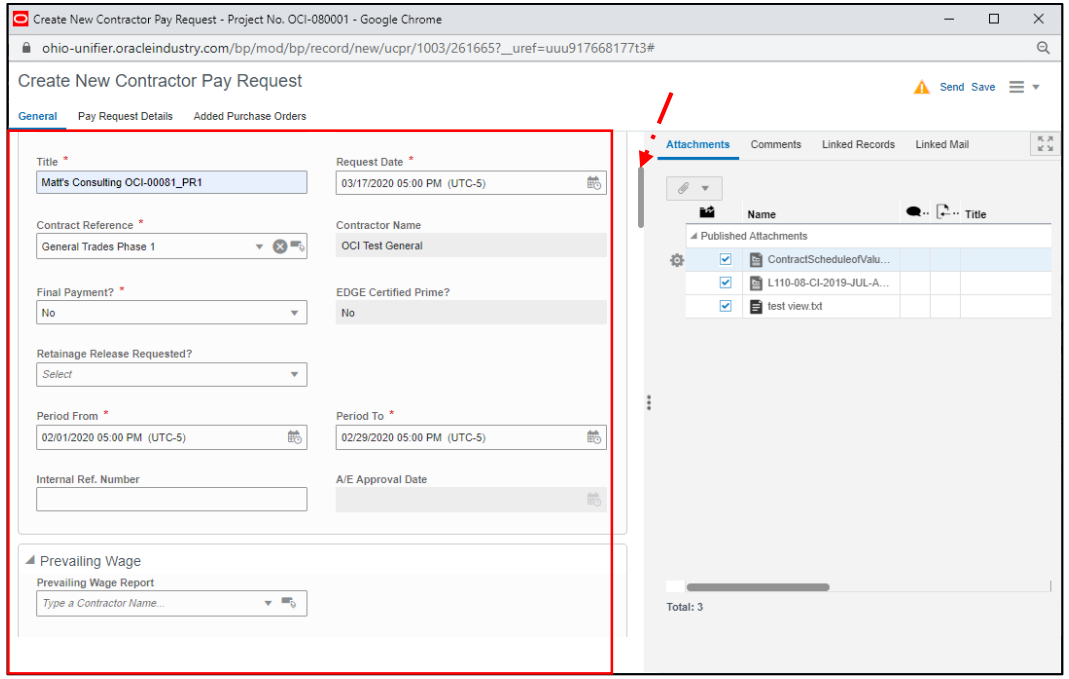
Current View:

- Fill out required information in the General Tab
- Scroll down to view the entire record
- Required information is marked with a red *



New View:

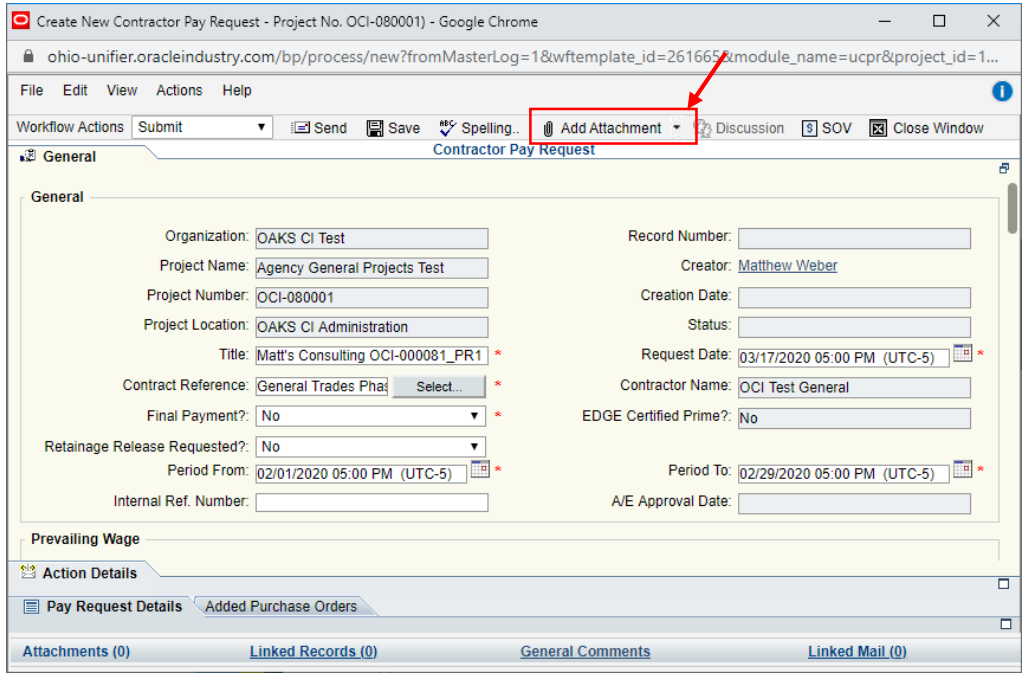
- Fill out all required information in the left pane
- Scroll down to view the entire record
- Required information is marked with a red *



Add Information to the Record

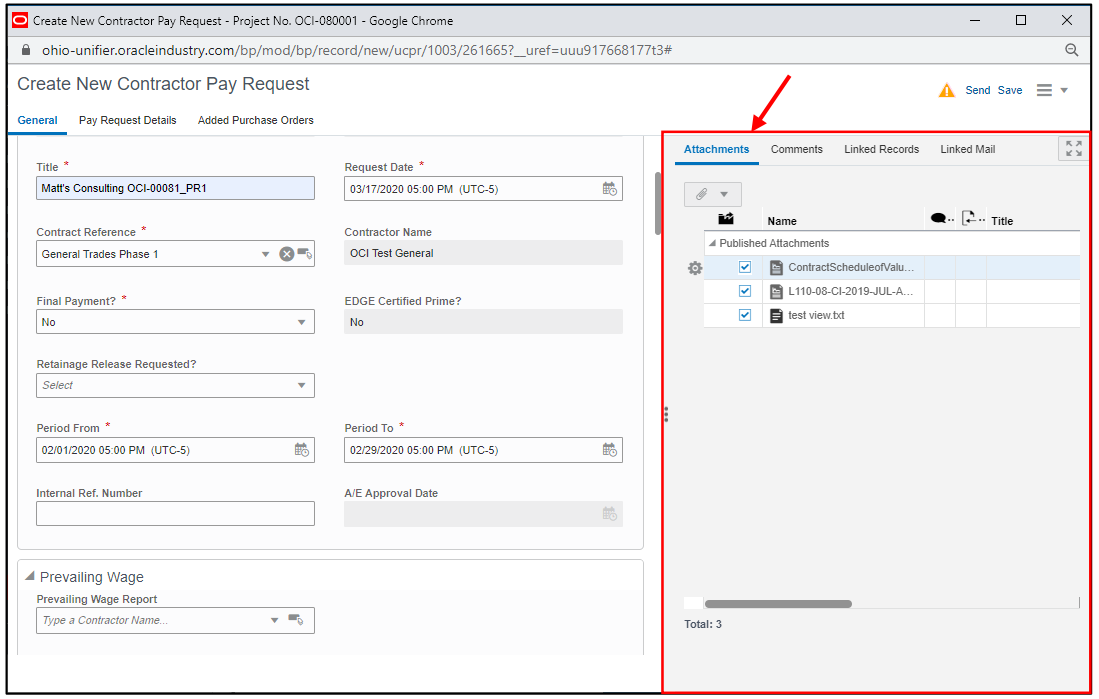
Current View:

- Add attachments by clicking **Add Attachment** near the top-center of the Record



New View:

- In the right pane, click **Attachments** to add any necessary documents to the record

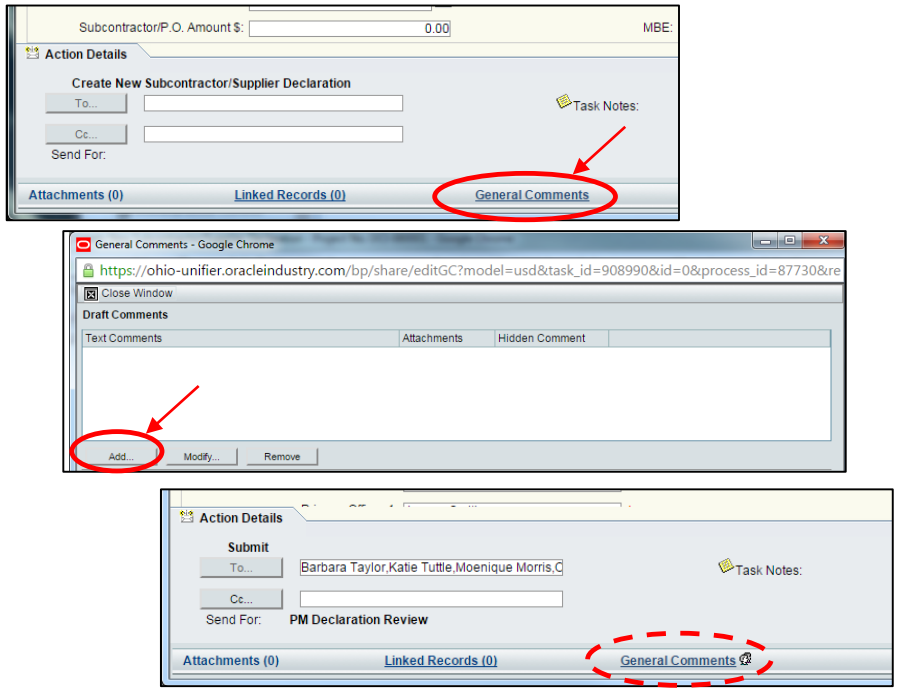


Add General Comments

- General Comments are a good way to communicate with team members about a specific record

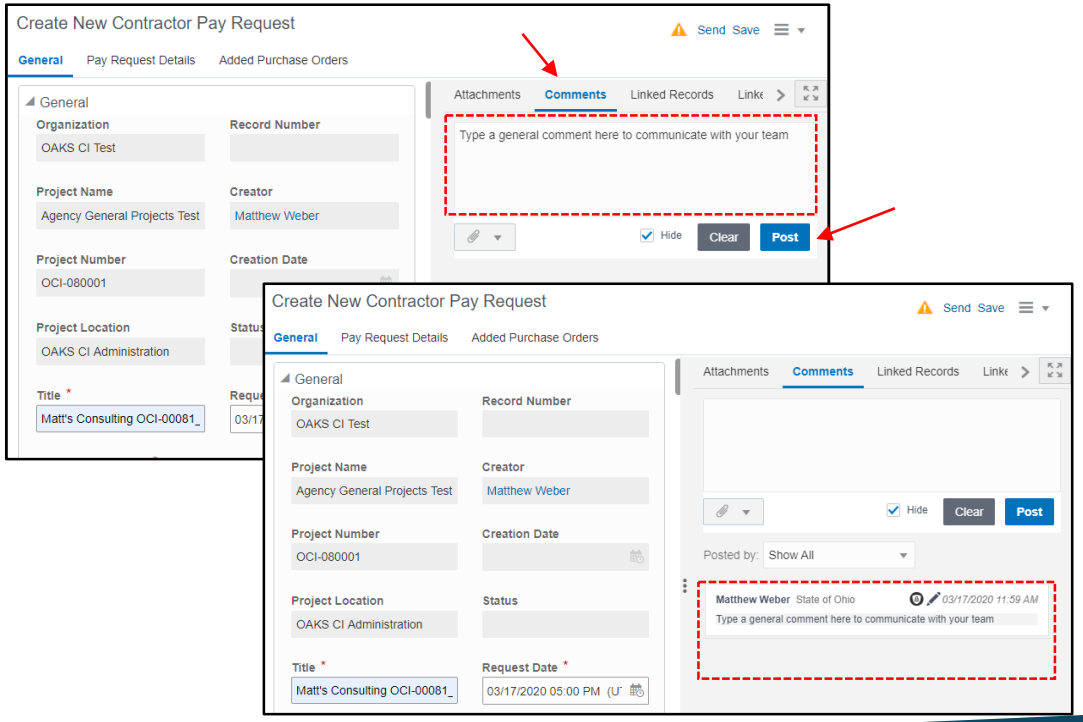
Old View:

- Click the General Comments at the bottom of the record
- Click Add
- Enter Comments and Click OK



New View:

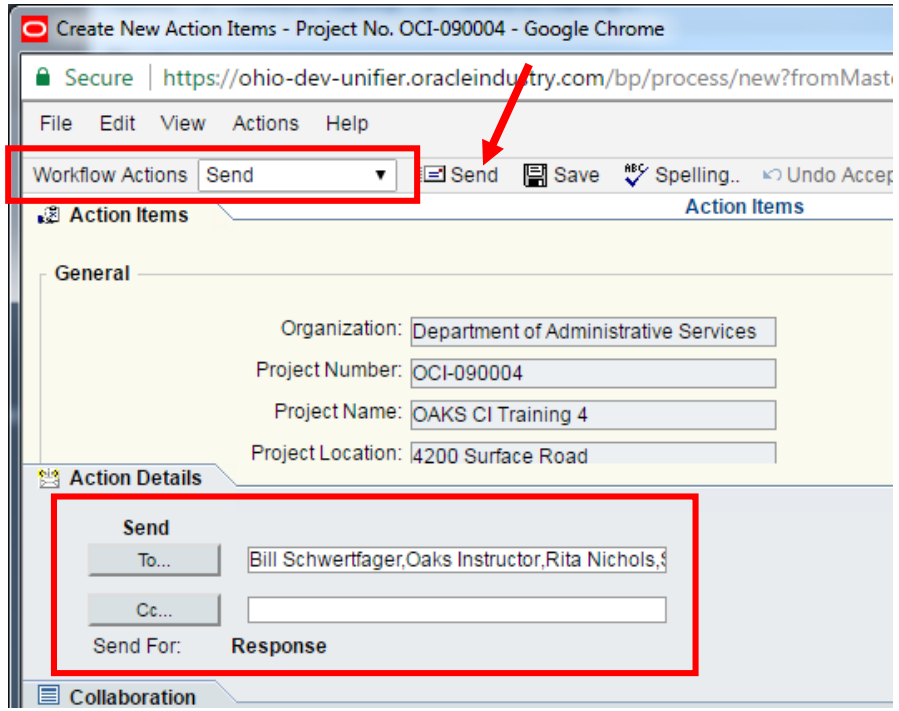
- Click the Comments tab located in the right pane of the record
- Type your comment in the text box
- Click Post (the comment will display below once posted)



Send the Record

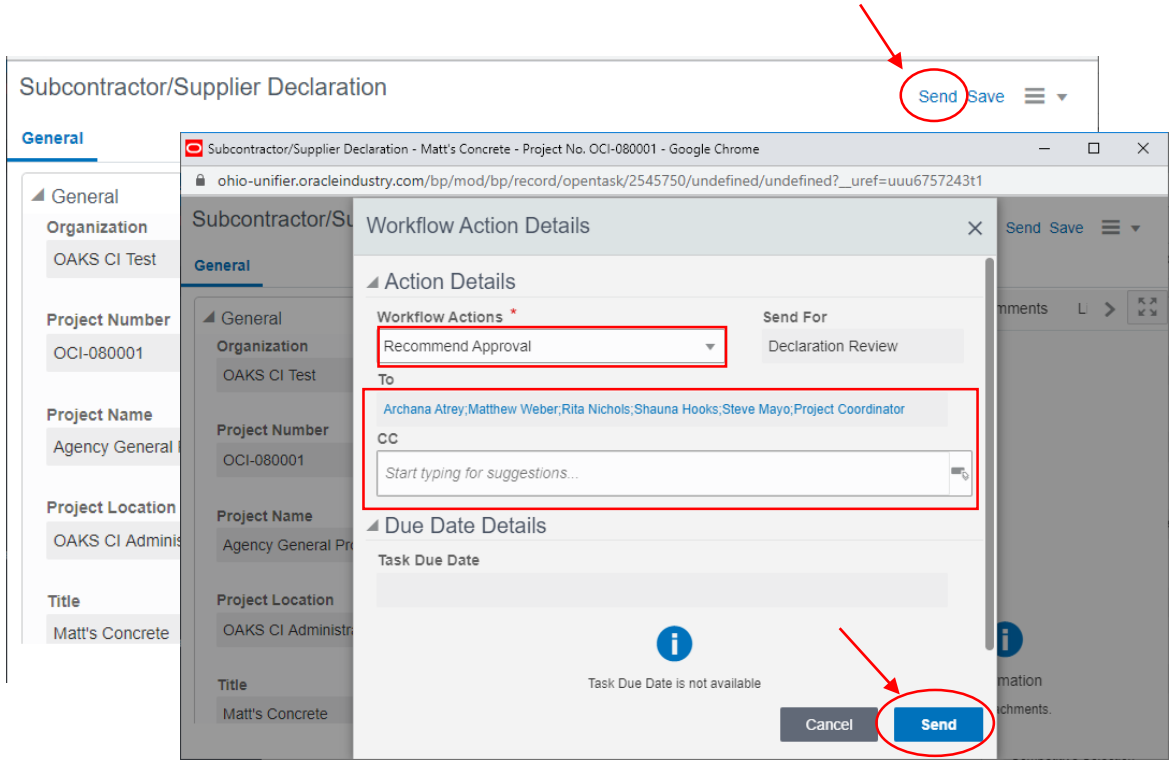
Old View:

- Choose or verify the correct Workflow Action is selected
- The Action Details section of the record will display the recipients of the next task
- Click **Send**



New View:

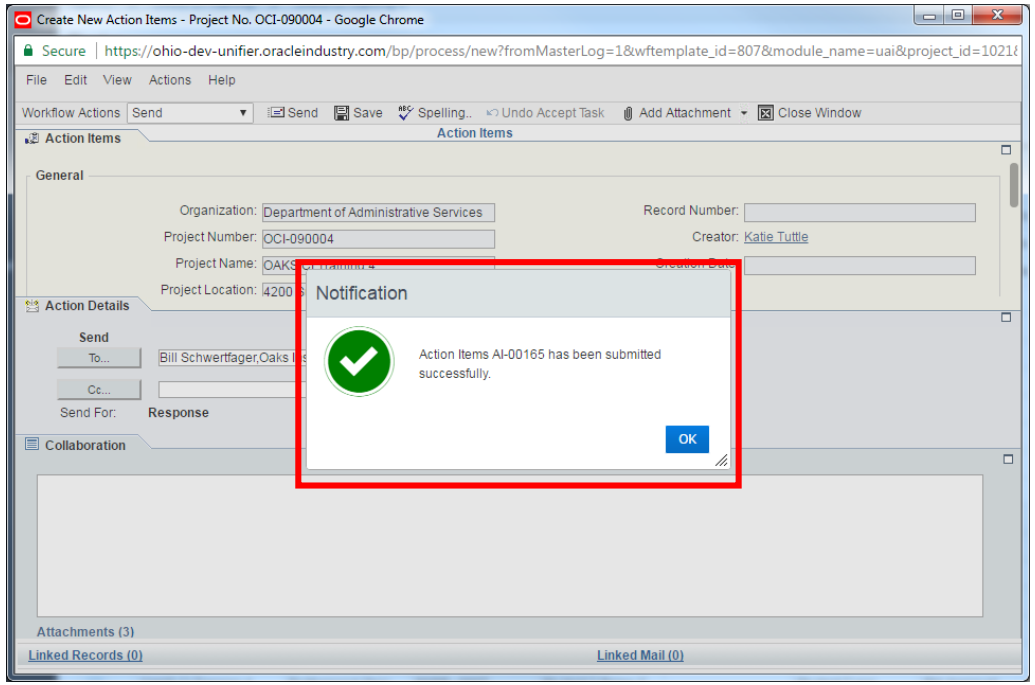
- Click the **Send** link (top right corner of the record)
- Choose or verify the correct Workflow Action is selected
- The recipients of the task are displayed below
- Click the **Send** button



Successful Submission

Old View:

- You should receive a notification that your record has been submitted successfully



New View:

- The record will close automatically once it has been submitted successfully

If you receive an error while sending and need assistance, please contact the OAKS CI Support Desk (oaksci@ofcc.ohio.gov)

Questions?

OAKS CI Support Desk Contact Info:

oaksci@ofcc.ohio.gov

614.644.2211