



Purchase Orders Agency/Higher-Ed

How will I use a Purchase Order?

Purchase Order Purpose

- ▶ Purchase Orders
 - ▶ Used to Support:
 - ▶ Contract
 - ▶ Change Order
 - ▶ Miscellaneous Commit: Acts as a contract in OAKS CI for vendors whom will not hold a contract in OAKS CI.

When do I create my PO in OAKS CI?

- ▶ Once you sign the Contract or Change Order in DocuSign, you will then:
 1. Create your Purchase Order in your own financial system of record then:
 2. Record your Purchase Order information in OAKS CI

Recording a Purchase Order

▶ To record your Purchase Order in Oaks CI navigate to:

- ▶ Logs -> Purchase Orders
- ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. The breadcrumb navigation path is Agency > OAKS CI Training > OAKS CI Training. The left-hand navigation menu has 'Logs' circled in red. The 'Purchase Orders' section is selected in the menu, and the 'Create' button is also circled in red. A red arrow points from the 'Purchase Orders' menu item to the 'Create' button. The main content area displays a table of Purchase Orders with columns for Title and Contract.

Title	Contract
Professional Services TEJ	test edit f
CMR Purchase Order	test edit f
title	Wednesd
Pallets	
Highway 66 Revisited	Katie's Co
CADC Boiler Project #1	jim
DMR123	Training
Franklin Project1	Test Agre
17504	Test Agre
PO 1	test edit f
PO #1	123Test A
3817	Test Agre
PO #1	Training
Po #1	marie cas
PO-001	RW Settle
Greenleaf	Test Agre
CSU	Test Agre
purchase order 1	Test Agre
PO 0018723792	Test Agre
Purchase Order 1	Test Agre
Monday testing	Test Agre
PO for Test #1	Test Agre
sample	

Record a Purchase Order

- ▶ Complete the General block
- ▶ All required fields are marked with a **Red ***
- ▶ The PO must be in “Dispatched” status
- ▶ Select PO Purpose
- ▶ Select Financial System of Record
- ▶ Under PO Type select the appropriate record type (**only pick one**) then click select to choose your record

The screenshot shows the 'Create New Purchase Orders' form in a web browser. The form is divided into several sections: General, PO Type, and PO Details. Red boxes and arrows highlight specific fields and actions:

- General Section:** Fields for Organization (Department of Administrative Service), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Title (PO #1), Vendor (Zenith Systems, LLC), Record Number, Creator (Katie Tuttle), Creation Date, Status (Dispatched), PO Purpose (Contract), and Financial System of Record (OAKS-FIN) are highlighted with red boxes. Red arrows point to the Status and PO Purpose dropdowns.
- PO Type Section:** A note states 'NOTE: Only pick one PO TYPE per record.' Below this are several options: Professional Services Agreement, Professional Services Amendment, Contract Name (Test - General), Change Order Name, and Miscellaneous Commit Name. The 'Contract Name' dropdown is highlighted with a red box, and a red arrow points to its 'Select...' button.
- PO Details Section:** A table lists contract records. A red arrow points to the 'Contract' window below.

Contract - Google Chrome

Contract - Current View: All Project Records

3 Item(s) Page 1 of 1 Display 100 Items Per Page

Contract No.	Contractor Name	Title
OCI-2	OCI Test General	C Test
OCI-090002-002	OCI Test General	Test - General
001	OCI Test General	Testing

Record a Purchase Order

- ▶ In the PO Details section- Ensure you plug in the Purchase Order number into the Record.
- ▶ Do **NOT** plug in the PO amount until adding Distribution Lines (see next slides)

Create New Purchase Orders - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=upo1&a=form.0&b=upo1&bpcsvimport=

File Edit View Help

Finish Editing Save Spelling.. Add Attachment Close Window

General Purchase Orders

PO Details

The OAKS PO No.should be a 10 digit number ex. 0000007825

OAKS PO No.: 12345

OAKS PO Amount (\$): ~~0.00~~ **Not Yet!**

OAKS PO Date: []

Date Dispatched: []

Created by Integration: -Select-

Local PO No.: []

Local PO Amount (\$): 0.00

Local PO Date: []

Date Dispatched: []

Total Amount (\$): 0.00

Line Item Total (\$): 0.00

Difference (\$): 0.00

OFCC Consultant List Only

Selection Method: [] Reimbursement Required?: []

Notes: []

PO Distribution Lines

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Fund the PO

- ▶ Click the PO Distribution Lines Tab

The image displays two screenshots of the Oracle Purchasing web interface. The left screenshot shows the 'PO Details' tab, where the 'PO Distribution Lines' tab is highlighted with a red circle. A red arrow points from this tab to the text 'Click Add'. The right screenshot shows the 'PO Distribution Lines' tab, which contains an empty table with the following columns: No., Fund Code, Fund Name, and System of Record. The 'Add' button in the bottom toolbar is also highlighted with a red circle.

▶ Click Add

Fund the PO

- ▶ Click Select to choose the appropriate fund code
 - ▶ **Note: If you do not see any funds to choose from, call OAKS CI**
- ▶ Enter a Short Description and Dollar Amount
- ▶ When finished entering information, click OK

Line Item - Google Chrome
https://ohio-unifier.oracleindustry.com/bp/studio/bp/database/itemopen?

Purchase Orders Line Item:

General

Fund Code: *

Fund Name:

Short Description: *

Amount (\$): *

Financial System of Record:

Notes:

Distribution Line

Location (Ship To ID):

Account:

Appropriation Line Item:

Fund Code:

Department:

Project Number: OCI 080001

Attachments (0) [Linked Records \(0\)](#)

Fund Code - Google Chrome
https://ohio-unifier.oracleindustry.com/bp/fsm/company/funding

Fund Code - Current View: All
2 Item(s) Page 1 of 1 Display 100 Items Per Page

Fund Code	Fund Name	Agency
OCI-Other-TestFund-0-OCI-1	OCI Test Money	OCI
OCI-Other-TestFund-0-OCI-Wave4	OCI Wave 4 Test Fund	OCI

Fund the PO

- ▶ When all lines are added, your lines will show up in the PO Distribution Lines tab

The screenshot shows a web browser window titled "Create New Purchase Orders - Project No. OCI-080001 - Google Chrome". The address bar shows the URL: <https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=upo1&a=form.0&b=u>. The application interface includes a menu bar (File, Edit, View, Help) and a toolbar with buttons for "Finish Editing", "Save", "Spelling..", "Add Attachment", and "Close Window". The main content area is divided into two tabs: "General" and "PO Distribution Lines", with the latter being the active tab. Below the tabs, it says "Current View: All" and "1 Item(s)". A table displays the following data:

No.	Fund Code	Fund Name	System of Record
001	OCI-Other-TestFund-0-OCI-Wave4	OCI Wave 4 Test Fund	OAKS-FIN

At the bottom of the window, there is a toolbar with buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". A "Total Amount:" field shows "\$30,000.00". Below the toolbar, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Finish the PO

- ▶ Go back to the upper form by clicking the General tab
- ▶ **Now**, type in the dollar amount of your PO that you entered into the Line Item
- ▶ The difference should be \$0
- ▶ Add any necessary Attachments
- ▶ Click Finish Editing

The screenshot shows the 'Create New Purchase Orders' form in a Google Chrome browser. The browser address bar shows the URL: <https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=upo1&a=form.0&b=uj>. The browser menu bar includes 'File', 'Edit', 'View', and 'Help'. The application menu bar includes 'Finish Editing', 'Save', 'Spelling', 'Add Attachment', and 'Close Window'. The 'General' tab is selected, showing the 'Purchase Orders' form. The 'PO Details' section contains the following fields:

OAKS PO No.:	12345	OAKS PO Amount (\$):	\$30,000.00
OAKS PO Date:		Local PO Amount (\$):	\$0.00
Date Dispatched:		Total Amount (\$):	\$30,000.00
Created by Integration:	-Select-	Line Item Total (\$):	\$30,000.00
Local PO No.:		Difference (\$):	\$0.00
Local PO Date:			
Date Dispatched:			

The 'OFCC Consultant List Only' section includes 'Selection Method:' and 'Reimbursement' fields. The 'PO Distribution Lines' section is currently empty. At the bottom, there are links for 'Attachments (0)', 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'. Red annotations highlight the 'Finish Editing' and 'Add Attachment' buttons in the browser menu, the 'OAKS PO Amount (\$)' field, and the 'Difference (\$)' field.

Questions?

Please contact OAKS CI Support Desk:

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