



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 New

The screenshot shows the Oracle Primavera Unifier web application interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier'. Below this, there are several browser tabs: 'Agency General...', 'Campus Resear...', 'Northcoast Beha...', and 'New Exhibition...'. The main interface is divided into a left-hand navigation menu and a right-hand content area. The navigation menu is a dark grey sidebar with a list of items. The 'BP Logs' item is circled in red. At the bottom of this menu, the 'Purchase Orders' item is highlighted in red, with a red arrow pointing to it from the left. The right-hand content area shows a table titled 'Purchase Orders - Current View: All' with 10 items. The table has two columns: 'Title' and 'Contract Name'. The items listed are: PO #1 (Test - General), PO Test 2 (Test - General), PO Test 1 (C Testtest#2), My Company PO1 (Migration 2), Testing (Test Agreement), Agreement 5 (Louis and Clark Arch) (SAO Agency), Purchase order test, Test (CustPrint Test-001), Test Add Line Item (Test - General), and Hema Patel.

Title	Contract Name
PO #1	Test - General
PO Test 2	Test - General
PO Test 1	C Testtest#2
My Company PO1	Migration 2
Testing	Test Agreement
Agreement 5 (Louis and Clark Arch)	SAO Agency
Purchase order test	
Test	CustPrint Test-001
Test Add Line Item	Test - General
Hema Patel	

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 Google Chrome. The 'General' section includes the following fields:

- 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: (empty)
- Creator: Katie Tuttle
- Creation Date: (empty)
- Status: Dispatched
- PO Purpose: Contract
- Financial System of Record: OAKS-FIN
- Change Status: (empty)

The 'PO Type' section includes a note: "NOTE: Only pick one PO TYPE per record." and the following options:

- Professional Services Agreement: (empty)
- Professional Services Amendment: (empty)
- Contract Name: Test - General
- Change Order Name: (empty)
- Miscellaneous Commit Name: (empty)

The 'PO Details' section shows a table of contract records:

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 interface. The left screenshot shows the 'PO Details' tab with a red circle around the 'PO Distribution Lines' tab. A red arrow points from this circle to the text 'Click Add'. The right screenshot shows the 'PO Distribution Lines' tab with a red circle around the 'Add' button in the bottom toolbar.

PO Details

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

OAKS PO No.:

OAKS PO Date:

Date Dispatched:

Created by Integration:

Local PO No.:

Local PO Date:

Date Dispatched:

PO Distribution Lines

Current View: All

Page 1 of 1

Display 100 Items Per Page

No.	Fund Code	Fund Name	System of Record
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Add Copy Import Remove Grid Find Total Amount: \$0.00

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: Select... *

Fund Name:

Short Description: *

Amount (\$): \$0.00 *

Financial System of Record: -Select-

Notes:

Distribution Line

Location (Ship To ID):

Account: -Select-

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 options like "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 active. Below the tabs, it indicates "Current View: All" and "1 Item(s)" on "Page 1 of 1". A table displays the distribution line details:

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 "Add", "Copy", "Import", "Remove", "Grid", and "Find" buttons. A "Total Amount:" field shows "\$30,000.00". Below the toolbar 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' window in Google Chrome. The browser address bar shows the URL: <https://ohio-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=upo1&a=form.0&b=uj>. The window title is 'Create New Purchase Orders - Project No. OCI-080001 - Google Chrome'. The application menu includes 'File', 'Edit', 'View', and 'Help'. The toolbar contains 'Finish Editing', 'Save', 'Spelling...', 'Add Attachment', and 'Close Window'. The 'General' tab is selected, showing the 'Purchase Orders' form. The 'PO Details' section includes the following fields:

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

The 'OFCC Consultant List Only' section includes 'Selection Method:' and 'Reimbursement' fields. The 'PO Distribution Lines' section is visible at the bottom. The footer contains 'Attachments (0)', 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'. Red annotations highlight the 'Finish Editing' and 'Add Attachment' buttons, the 'OAKS PO Amount (\$)' field, and the 'Difference (\$)' field.

Questions?

Please contact OAKS CI Support Desk:

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