



# Miscellaneous Commits

## K-12 Cloud

# Purpose and Procedure

- ▶ A Miscellaneous Commit acts as a contract in OAKS CI for vendors whom will not hold a contract in OAKS CI (e.g. utility supplier).
- ▶ The commit must have a supporting Purchase Order recorded in OAKS CI
- ▶ The record can be created by the following people:  
A/E, District Treasurer, Project Coordinator (PC), Project Manager (PM), District Rep, Owner's Agent (OA), Owner Financial
- ▶ Workflow:  
Creation → Sent to: **PM Approval** → Sent to: **District Treasurer for Funding Certification** → Sent to: **Update (if necessary)**

# Creating a Miscellaneous Commit

- ▶ To create your Miscellaneous Commit in Oaks CI navigate to:
  - ▶ Logs -> Miscellaneous Commit K-12
  - ▶ Click New

The screenshot shows the Oracle Primavera Unifier web application interface. The browser tabs include 'Home', 'Talawanda-CSD...', and 'Brown-LSD-CAR...'. The 'User' menu is open, showing a list of navigation options. The 'Logs' option is circled in red. A red arrow points from the 'Logs' option to the 'Miscellaneous Commit K...' item in the list. The 'File' menu is also open, showing 'New', 'Copy', and 'Open' options, with 'New' circled in red. The main content area displays a table of 'Miscellaneous Commit K12' items, including 'Tap Fees', 'National Road Utility Supply Inv.', 'Code Enforcement Inspection Fee', 'AEP Permanent Power Invoice', 'AEP Invoice', 'PMC PO', 'Fire Hydrant Flow Test', 'Pole Relocation', 'Carroll County Engineer's Office', 'Builders Risk Coverage', 'Coral Road Gas Line Relocation', 'OH-EPA Expense', 'PO-PMC-Inv2599331', 'PO-PMC-Inv2599331 - XXX', 'Furniture Purchased', 'Tap Fees - XXX', 'National Road Utility Supply Inv. - XXX', 'Code Enforcement Inspection Fee - XXX', 'AEP Permanent Power Invoice - XXX', 'AEP Invoice - XXX', 'PMC PO - XXX', 'Fire Hydrant Flow Test - XXX', 'Pole Relocation - XXX', 'Carroll County Engineer's Office - XXX', 'Builders Risk Coverage - XXX', 'Coral Road Gas Line Relocation - XXX', 'OH-EPA Expense - XXX', and 'PO-PMC-Inv2599331 - XXX'.

# Add Information

- ▶ Click the General tab to expand the upper form

The screenshot shows a web browser window titled "Create New Miscellaneous Commit K12 - Project No. SFC-080001 - Google Chrome". The URL is [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=2961&module\\_name=umck&csvimport=fa](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2961&module_name=umck&csvimport=fa). The browser menu includes File, Edit, View, Actions, and Help. The page title is "Miscellaneous Commit K12".

The "General" tab is selected and highlighted with a red circle and arrow. The form contains the following fields:

- Project Number: SFC-080001
- Project Name: OAKS CI District Training Project 1
- Organization Name: OAKS CI District Training Project - 1
- Facility Name: [Empty]
- Record Number: [Empty]
- Creator: Katie Tuttle
- Creation Date: [Empty]
- Status: [Empty]

Below the form are sections for "Action Details" and "Line Item List".

**Action Details**

Create New Miscellaneous Commit K12

To... [Empty]

Cc... [Empty]

Send For: [Empty]

Task Notes: [Empty]

**Line Item List**

Current View: All

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

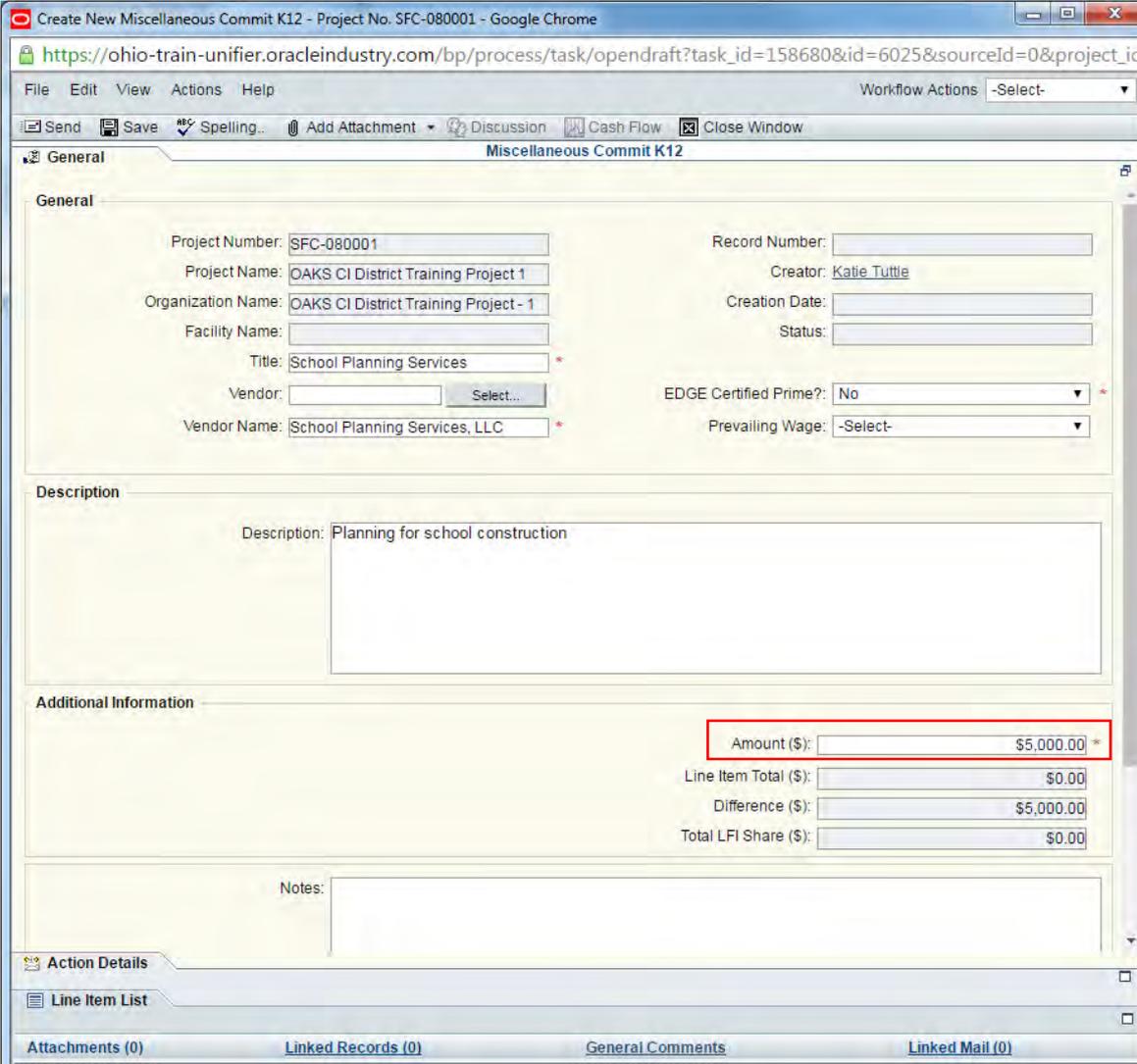
No.	WBS Code	Code Name	Short Description	Amount	LFI Percent	LFI Share (\$)	Associated Building
[Empty]							

Total Amount: \$0.00

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Add Information

- ▶ Complete information in the upper form
  - ▶ Required information is marked with a red \*
- ▶ Enter Amount in Additional Information



Create New Miscellaneous Commit K12 - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task\_id=158680&id=6025&sourceId=0&project\_ic

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

General Miscellaneous Commit K12

General

Project Number: SFC-080001 Record Number:

Project Name: OAKS CI District Training Project 1 Creator: Katie Tuttle

Organization Name: OAKS CI District Training Project - 1 Creation Date:

Facility Name:  Status:

Title: School Planning Services \*

Vendor:  Select... EDGE Certified Prime?: No \*

Vendor Name: School Planning Services, LLC \* Prevailing Wage: -Select-

Description

Description: Planning for school construction

Additional Information

Amount (\$):	<input type="text" value="\$5,000.00"/> *
Line Item Total (\$):	<input type="text" value="\$0.00"/>
Difference (\$):	<input type="text" value="\$5,000.00"/>
Total LFI Share (\$):	<input type="text" value="\$0.00"/>

Notes:

Action Details

Line Item List

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

# Add Line Items

- ▶ Click the “Line Item List” tab to add line items

Project Number: SFC-080001

Record Number:

Project Name: OAKS CI District Training Project 1

Creator: Katie Tuttle

Organization Name: OAKS CI District Training Project - 1

Creation Date:

Facility Name:

Status:

Title: School Planning Services \*

Vendor: Select...

EDGE Certified Prime?: No \*

Vendor Name: School Planning Services, LLC \*

Prevailing Wage: -Select-

Description: Planning for school construction

Amount (\$):	\$5,000.00 *
Line Item Total (\$):	\$0.00
Difference (\$):	\$5,000.00
Total LFI Share (\$):	\$0.00

Notes:

**Line Item List**

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

# Add Line Items

- ▶ Click Add to begin adding line item information
- ▶ Click the arrow next to WBS Code to select an appropriate code

The screenshot displays the Oracle Primavera software interface. The main window is titled "Create New Miscellaneous Commit K12 - Project No. SFC-080001 - Google Chrome". The URL is [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=2961&module\\_name=umck&csvimport=false&prc](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2961&module_name=umck&csvimport=false&prc). The interface shows a "Line Item List" table with columns "No.", "WBS Code", and "Code Name". The "Add" button is circled in red. A red arrow points from the "Add" button to the "Line Item" form. The "Line Item" form is titled "Miscellaneous Commit K12 Line Item:" and has a "General" section with fields for "WBS Code", "Code Name", "Short Description", "Amount (\$)", "LFI Percent", "Subcontractor/Supplier", and "Description". The "WBS Code" field has a dropdown arrow circled in red. A red arrow points from the dropdown arrow to the "WBS Code" field. The "Details" section has fields for "EDGE Certified Prime Contractor?" and "EDGE Certified Sub?". The "OK" and "Cancel" buttons are at the bottom.

# Choose WBS Code

- ▶ Click Collapse to simplify the list

The image shows two overlapping browser windows from the 'WBS Picker' application. The left window displays a list of WBS codes with expand/collapse icons. A red circle highlights the 'Collapse' button, and a red arrow points to it. The right window shows a detailed view of a selected WBS code, displaying a table of WBS items.

WBS Code	WBS Item
1 PA-00-00	Property Acquisition Summary
5 RM-00-00	Relocation and Moving Summary
10 OR-00-00	Owner Expense Summary
30 AE-00-00	Professional Design Summary
62 CM-00-00	Construction Management Summary
90 CMR-00-00	Construction Manager at Risk Summary
109 DB-00-00	Design-Build Summary
136 CE-00-00	Construction Execution Summary
225 Cx-00-00	Commissioning Summary
247 FE-00-00	F F and E Summary
258 ES-00-00	Energy Services Summary

17	OR-OT-BE	OR Other Expense Budget
18	OR-OT-BC	OR Basic Commissioning
19	OR-OT-TI	OR Tests and Inspections
20	OR-OT-SU	OR Site Surveying Services
21	OR-OT-GT	OR Geotechnical Investigation
22	OR-OT-EN	OR Environmental Survey
23	OR-OT-PF	OR Partnering Facilitation
24	OR-OT-OT	OR Other Expense
25	OR-CF-00	Owner Contingency Fund
26	OR-CF-BE	Owner Contingency Fund Budget
27	OR-CF-OC	Owner Contingency Fund
28	OR-CF-AE	AE Change Order Allowance

# Choose WBS Code

- ▶ Choose a WBS code by clicking the plus sign then highlighting the appropriate WBS code
- ▶ Click Select

The image shows two overlapping browser windows from the 'WBS Picker' application. The left window displays a table of WBS codes with the following data:

	WBS Code	
1	PA-00-00	Property Ac
5	RM-00-00	Relocation
10	OR-00-00	Owner Exp
30	AE-00-00	Professiona
62	CM-00-00	Construction
90	CMR-00-00	Construction
109	DB-00-00	Design-Buil
136	CE-00-00	Construction
225	Cx-00-00	Commission
247	FE-00-00	F F and E S
258	ES-00-00	Energy Ser

The right window shows a detailed view of the 'OR-PL-PL' code, with the following data:

	WBS Code	WBS Item
1	PA-00-00	Property Acquisition Summary
5	RM-00-00	Relocation and Moving Summary
10	OR-00-00	Owner Expense Summary
11	OR-OR-00	Owner Expense General
13	OR-PL-00	OR Planning Expense Summary
	OR-PL-BE	OR Planning Budget
15	OR-PL-PL	OR Planning
16	OR-OT-00	OR Other Expense General
25	OR-CF-00	Owner Contingency Fund
30	AE-00-00	Professional Design Summary
62	CM-00-00	Construction Management Summary
90	CMR-00-00	Construction Manager at Risk Summary
109	DB-00-00	Design-Build Summary
136	CE-00-00	Construction Execution Summary
225	Cx-00-00	Commissioning Summary
247	FE-00-00	F F and E Summary
258	ES-00-00	Energy Services Summary

A red circle highlights the plus sign next to 'OR-00-00' in the left window, and a red arrow points from this circle to the 'OR-PL-PL' code in the right window. The 'Select' button in the right window is also circled in red.

# Add Line Items

- ▶ WBS Code will populate
- ▶ Add a short description, Amount, LFI Percent (if necessary)
- ▶ Add any additional information
- ▶ Click OK

The screenshot shows a web browser window titled "Line Item - Google Chrome" with the URL <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=forr>. The page displays a form for a "Miscellaneous Commit K12 Line Item".

**General**

WBS Code:  \*

Code Name:

Short Description:  \*

Amount (\$):

LFI Percent:

Subcontractor/Supplier:

Description:

District:

Associated Building:

**Details**

EDGE Certified Prime Contractor?:

EDGE Certified Sub?:

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

# Miscellaneous Commit

- ▶ Line Item will be populated in the Line Item List
- ▶ Total Amount is reflected below

Current View: All  
1 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	WBS Code	Code Name	Short Description	Amount	LFI Percent	LFI Share (\$)	Associated Build
001	OR-PL-PL	OR Planning	Planning Expense	\$5,000.00	12	\$600.00	

Total Amount: \$5,000.00

# Miscellaneous Commit

- ▶ Line Item total populates in the upper form
- ▶ **Difference should always be \$0**

Create New Miscellaneous Commit K12 - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task\_id=158680&id=6025&sourceId=0&project

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

**General** Miscellaneous Commit K12

Vendor Name: School Planning Services, LLC \* Prevailing Wage: -Select-

**Description**

Description: Planning for school construction

**Additional Information**

Amount (\$):	\$5,000.00 *
Line Item Total (\$):	\$5,000.00
Difference (\$):	\$0.00
Total LFI Share (\$):	\$800.00

Notes:

**Action Details**

**Line Item List**

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Complete the Record

- ▶ Add attachments if necessary
- ▶ Then, click Action Details tab

Create New Miscellaneous Commit K12 - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task\_id=158680&id=6025&sourceId=0&project

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling Add Attachment Discussion Cash Flow Close Window

General Miscellaneous Commit K12

Vendor Name: School Planning Services, LLC \* Prevailing Wage: -Select-

Description

Description: Planning for school construction

Additional Information

Amount (\$):	\$5,000.00 *
Line Item Total (\$):	\$5,000.00
Difference (\$):	\$0.00
Total LFI Share (\$):	\$600.00

Notes:

Action Details

Line Item List

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

# Complete the Record

- ▶ Choose a Workflow Action
- ▶ Notice the Action details pane populates with recipient of the record

The screenshot displays the Oracle APEX interface for creating a new miscellaneous commit. The browser title is "Create New Miscellaneous Commit K12 - Project No. SFC-080001 - Google Chrome". The URL is [https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task\\_id=158680&id=6025&sourceid=00.project](https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=158680&id=6025&sourceid=00.project). The page title is "Miscellaneous Commit K12".

The "General" section contains the following fields:

- Vendor Name: School Planning Services, LLC
- Prevailing Wage: -Select-
- Description: Planning for school construction

The "Action Details" section is highlighted with a red box and contains the following information:

- Action: Submit
- To: Barbara Taylor, Katie Tuttle, Moenique Morris, R
- Cc: Barbara Taylor, Katie Tuttle, Moenique Morris, R
- Send For: Approval

The "Line Item List" section shows the following data:

No.	WBS Code	Code Name	Short Description	Amount	LFI Percent	LFI Share (\$)	Associated Building
001	OR-PL-PL	OR Planning	Planning Expense	\$5,000.00	12	\$600.00	

At the bottom of the page, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# Send the Record

- ▶ Click Send

The screenshot shows a web browser window titled "Create New Miscellaneous Commit K12 - Project No. SFC-080001 - Google Chrome". The URL is [https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task\\_id=158680&id=6025&sourceId=0&project](https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=158680&id=6025&sourceId=0&project). The browser's menu bar includes File, Edit, View, Actions, and Help. The application toolbar contains buttons for Send, Save, Spelling, Add Attachment, Discussion, Cash Flow, and Close Window. The "Send" button is circled in red, with a red arrow pointing to it from the left. Below the toolbar, the form is titled "Miscellaneous Commit K12" and has a "General" tab selected. The "Vendor Name" field contains "School Planning Services, LLC" and the "Prevailing Wage" dropdown is set to "-Select-". The "Description" field contains "Planning for school construction". The "Action Details" section shows a "Submit" button, a "To..." field with "Barbara Taylor,Katie Tuttle,Moenique Morris,R", a "Cc..." field with "Barbara Taylor,Katie Tuttle,Moenique Morris,R", and a "Send For:" dropdown set to "Approval". The "Line Item List" section shows "Current View: All", "Page 1 of 1", and "Display 100 Items Per Page". A table with one row is displayed:

No.	WBS Code	Code Name	Short Description	Amount	Percent	LFI	LFI Share (\$)	Associated Building
001	OR-PL-PL	OR Planning	Planning Expense	\$5,000.00	12		\$600.00	

At the bottom of the form, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# What's Next?

- ▶ A Purchase Order must now be created in your own financial system of record
- ▶ The Purchase Order must be recorded in OAKS CI to support the Miscellaneous Commit
- ▶ The Purchase Order will be added to the Miscellaneous Commit Record at the “Funding Certification” step
- ▶ For more information on creating Purchase Orders, please refer to the Job Aid on our website, [ofcc.ohio.gov](http://ofcc.ohio.gov)

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211