



Locally Funded Initiative MOU

K-12 Cloud

Purpose & Procedure

- ▶ The Project Manager or Owner's Agent is responsible for the LFI MOU and for ensuring the LFI is correctly reflected on Contract SOV records.

- ▶ Workflow

Created by: PM or PC → Sent to: District Treasurer for Funding Plan → Sent to: PC for DocuSign

Create LFI MOU

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> LFI MOU K12
 - ▶ Click New
 - ▶ Select Workflow



Select Workflow - Google Chrome

Secure | <https://ohio-dev-unifier.oracleindustry.com/bp/process>

Select Workflow

Business Process:

Workflow:

ORACLE PRIMAVERA Unifier

Katie Tuttle | Sign Out

Home x Talawanda-CSD... x Brown - New K-12

Navigate To...

User Admin File Edit View Help

New Copy Open Find Filtered By

LFI MOU K12 - Current View: All

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

Stage	% Project Construction Fund	% Local Initiative Fund	Total LFI Estimate (\$)
Design Developme	85	15	\$7,500.00

Logs

- Action Items K12
- Advertisements K12
- Applications for Payment ...
- Budgets K12
- Certified Payrolls K12
- Closeout - Contractor K12
- Contract K12
- Contract Modification K12
- Contract Schedule of Valu...
- Design Reviews K12
- Escrow Accounts K12
- Field Reports K12
- Fund Release K12
- Fund Transfers K12
- LFI MOU K12
- Liens K12
- Locally Funded Initiative ...
- Meeting Minutes K12

LFI MOU

- ▶ Complete all open fields
 - ▶ Fields marked with a red * are mandatory
- ▶ Scroll down to continue entering information

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3033&module_name=ulfim&csvimport=f

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add Attachment Discussion Close Window

LFI MOU

Locally Funded Initiative MOU

Use the LFI MOU Breakdown Spreadsheet to calculate the amounts. Complete the data fields and save the record as a draft, create a custom print for signatures, upload the spreadsheet and custom print to the document manager and attach to this record.

General

Project Number:	<input type="text" value="SFC-080001.01"/>	Record Number:	<input type="text"/>
Project Name:	<input type="text" value="Oak Hills Local Building Project"/>	Creator:	<input type="text" value="Katie Tuttle"/>
Organization Name:	<input type="text"/>	Creation Date:	<input type="text"/>
Facility Name:	<input type="text"/>	Status:	<input type="text"/>
County:	<input type="text"/>	Stage:	<input type="text" value="Design Development"/>
Title:	<input type="text" value="LFI MOU #1"/>		

OSFC Scope of Work

Include values from LFI Worksheet Lines A, M, S, and T

OSFC Scope of Work:

Action Details

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

LFI MOU

- ▶ Continue entering information into open fields

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3033&module_name=ulfim&csvimport=f

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add Attachment Discussion Close Window

LFI MOU

Locally Funded Initiative MOU

Local Initiative Scope of Work

Local Initiative Scope of Work:

Local Initiative Budget

Include values from LFI Worksheet Lines F, N, Y and Z

Construction Costs (\$):	5,000.00
Contingency (\$):	4,000.00
Non-Construction Costs (\$):	2,000.00
Total LFI Estimate (\$):	11,000.00

Additional SqFt or Renovation Project Improvement

Include values from LFI Worksheet Lines N and Y

Additional SqFt Description:

Additional SqFt Total Amount (\$): 0.00

Action Details

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

LFI MOU

- ▶ Finish adding information
- ▶ **% Project Construction Fund and % Local Initiative Fund are Required and must = 100**

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3033&module_name=ulfim&csvimport=f

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add Attachment Discussion Close Window

LFI MOU Locally Funded Initiative MOU

Material or Scope Upgrade LFIs

Include values from LFI Worksheet Lines K and Z

Material or Scope Upgrade Description:

Material or Scope Upgrade Total Amount (\$): 0.00

AE and CM Amendment Budget and Deadline

Values within Line BB of LFI Worksheet

A/E and CM Amendment Budget and Deadline:

Proportional Sharing Percentages

Check these values! The sum of all construction contracts times the LFI % should equal the Construction Cost LFI Budget shown above.

% Project Construction Fund: 68 * % Local Initiative Fund: 32 *

Proportion Check (Must = 100): 100

LFI Fund(s) and Cost Center(s):

Action Details

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

Submit LFI MOU

- ▶ Attach any supporting documentation
- ▶ Send the record forward by choosing the Workflow Action: Submit
- ▶ “To” box will populate with recipient of record
- ▶ Click Send

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3658&module_name=ulfim&csvimport=false&pro

File Edit View Actions Help

Send Save Spelling.. Undo Accept Task Add Attachment Discussion Close Window

Workflow Actions Submit

Submit

LFI MOU

Locally Funded Initiative MOU

LFI MOUs are now processed in DocuSign. Use the LFI MOU Breakdown Spreadsheet or other aids to calculate the amounts. Complete the data fields. Take the workflow action submit to forward this record to the District Treasurer to obtain the funding information.

General

Project Number: SFC-080001.01 Record Number:

Project Name: Oak Hills Local Building Project Creator: Katie Tuttle

Organization Name: Creation Date:

Facility Name: Status:

County:

Title: LFI MOU #1 Stage: Design Development

OSFC Scope of Work

Include values from LFI Worksheet Lines A, M, S, and T

OSFC Scope of Work: Scope of work here

Action Details

Submit

To... Archana Atrey, Barbara Taylor, Katie Tuttle, Purn

Cc...

Send For: Funding Plan

Task Notes:

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

Funding Plan Step- District Treasurer

Receive an Email

Thu 6/23/2016 8:48 AM

Unifier - Katie Tuttle,soo <unifier_notifications@oracle.com>
LFI MOU K12 LFI_MOU-02 is sent to you for Funding Plan.

To Tuttle, Katie

If there are problems with how this message is displayed, click here to view it in a web browser.

This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: Brown - New K-12

LFI MOU K12 LFI_MOU-02 is sent to you for Funding Plan.

From :	Katie Tuttle
Sent For :	Funding Plan

Source Name :	Brown - New K-12
Record No :	LFI MOU K12 LFI_MOU-02
Title :	LFI MOU test #2

Unifier Login

For Oracle technical assistance <http://www.oracle.com/us/support>

Task Action

- ▶ To take action on your Task navigate to:
 - ▶ Collaboration
 - ▶ Tasks
- ▶ Double-click the LFI MOU record to open

The screenshot shows the Oracle Primavera Unifier web interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle' with a star icon, a help icon, and a 'Sign Out' link. Below the navigation bar, there are browser tabs for 'Home', 'Talawanda-Kra...', and 'Brown - New K-12'. The main content area is titled 'Tasks - Current View: All' and shows a table with 3 items. The first item, 'LFI MOU K12', is highlighted with a red box and a red arrow. The table columns are: Type, Number, Title, Re Du, From, and Sent for. The 'Collaboration' menu item in the left sidebar is circled in red.

Type	Number	Title	Re Du	From	Sent for
LFI MOU K12	LFI_MOU-02	LFI MOU		Katie Tuttle,so	Funding Plan
LFI MOU K12	LFI_MOU-01	Test LF		Katie Tuttle,so	Funding Plan
Request for Interpretation K12	RFI-0001	Reques		Katie Tuttle,so	Change Order Request

Task Action

- ▶ Click Accept Task to begin work on your Task

The screenshot shows a web browser window titled "Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=177406&parent_id=0&viewOnly=0&project_id=108. The browser's menu bar includes File, Edit, View, Actions, and Help. Below the menu bar, there is a toolbar with buttons for "Accept Task", "Decline Task", "Review", and "Close Window". The "Accept Task" button is circled in red. The main content area is titled "Locally Funded Initiative MOU" and contains several sections:

- General**: A form with fields for Project Number (SFC-080001.01), Record Number (LFI-01), Project Name (Oak Hills Local Building Project), Organization Name, Facility Name, County, Title (LFI MOU #1), Creator (Katie Tuttle), Creation Date (02/22/2017 08:36 AM (UTC-8)), Status (Pending), and Stage (Design Development).
- OSFC Scope of Work**: A section with a text area containing "Scope of work here".
- Local Initiative Scope of Work**: A section with a text area.
- Task Details**: A section with fields for From (Katie Tuttle), Task Due Date, To (District Treasurer, Archana Atrey), Task Status (Not Started), Cc, and Sent For (Funding Plan). It also includes links for "Task Notes (0)" and "Workflow Progress".

At the bottom of the window, there are four tabs: "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Complete Information

- ▶ Scroll down to the Funding Plan section
- ▶ Enter Funding Sources and Amounts
- ▶ Next scroll down to the Proportional Sharing Percentages section
- ▶ Enter The LFI Fund(s) and Cost Center(s)

The screenshot shows a web browser window titled 'Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome'. The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=177406&model=ulfim&project_id=1086&initiateBP-. The page title is 'Locally Funded Initiative MOU'. The browser menu includes 'File', 'Edit', 'View', 'Actions', and 'Help'. The 'Workflow Actions' dropdown is set to '-Select-'. The browser toolbar shows 'Send', 'Save', 'Spelling...', 'Undo Accept Task', 'Add Attachment', 'Discussion', 'Review', and 'Close Window'. The main content area is titled 'LFI MOU' and contains two sections: 'Funding Plan' and 'Proportional Sharing Percentages'. The 'Funding Plan' section is circled in red and contains the text 'Enter the funding source(s) and amount(s) that are/will be reserved to fund the District's Locally Funded Initiatives.' Below this text is a table with 8 rows for 'Funding Source' and 'Amount'. The first row is filled with 'Fund 004' and '700,000.00'. The 'Total LFI Funds' row shows '700,000.00'. The 'Proportional Sharing Percentages' section is also circled in red and contains three input fields: '% Project Construction Fund:' with a value of '50', '% Local Initiative Fund:' with a value of '50', and 'Proportion Check (Must = 100):' with a value of '100'. Below these fields is a text input field for 'LFI Fund(s) and Cost Center(s):' containing 'Fund 004', which is also circled in red and has a red arrow pointing to it. At the bottom of the page, there is an 'Action Details' section with links for 'Attachments (0)', 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'.

Funding Source	Amount
Funding Source 1: Fund 004 *	Amount 1: 700,000.00 *
Funding Source 2:	Amount 2: 0.00
Funding Source 3:	Amount 3: 0.00
Funding Source 4:	Amount 4: 0.00
Funding Source 5:	Amount 5: 0.00
Funding Source 6:	Amount 6: 0.00
Funding Source 7:	Amount 7: 0.00
Funding Source 8:	Amount 8: 0.00
Total LFI Funds:	700,000.00

% Project Construction Fund: 50 % Local Initiative Fund: 50
Proportion Check (Must = 100): 100

LFI Fund(s) and Cost Center(s): Fund 004 *

Send the Record

- ▶ Attach any supporting documentation
- ▶ To send the record, choose Workflow Action: Submit Funding Plan
- ▶ Record will now go to OFCC for DocuSign initiation
- ▶ Click Send

Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=177406&model=ulfim&project_id=1086&initiateBP:

File Edit View Actions Help

Workflow Actions Submit Funding P

Send Save Spelling.. Undo Accept Task Add Attachment Discussion Review Close Window

Submit Funding Plan

Return for Clarification

LFI MOU

Locally Funded Initiative MOU

Funding Plan

Enter the funding source(s) and amount(s) that are/will be reserved to fund the District's Locally Funded Initiatives.

Funding Source 1:	<input type="text" value="Fund 004"/>	Amount 1:	<input type="text" value="700,000.00"/>
Funding Source 2:	<input type="text"/>	Amount 2:	<input type="text" value="0.00"/>
Funding Source 3:	<input type="text"/>	Amount 3:	<input type="text" value="0.00"/>
Funding Source 4:	<input type="text"/>	Amount 4:	<input type="text" value="0.00"/>
Funding Source 5:	<input type="text"/>	Amount 5:	<input type="text" value="0.00"/>
Funding Source 6:	<input type="text"/>	Amount 6:	<input type="text" value="0.00"/>
Funding Source 7:	<input type="text"/>	Amount 7:	<input type="text" value="0.00"/>
Funding Source 8:	<input type="text"/>	Amount 8:	<input type="text" value="0.00"/>
Total LFI Funds:			<input type="text" value="700,000.00"/>

Proportional Sharing Percentages

% Project Construction % Local Initiative Fund:

Action Details

Submit Funding Plan [\(Click here to view latest content\)](#)

To...

Cc...

Send For: DocuSign Initiation

Task Notes:

Workflow Progress

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

Next Step

- ▶ The OFCC Project Coordinator will now create the DocuSign document and circulate the document for signature

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211