



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, PC or OA → 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 Create
- ▶ Select Workflow

The screenshot shows the Primavera Unifier web application. The browser address bar displays <https://ohio-dev-unifier.oracleindustry.com/bp/ro/>. The page title is "PRIMAVERA Unifier (Development)". The user is logged in as "Katie Tuttle". The navigation menu on the left is open, and the "Logs" option is circled in red. A red arrow points from the "Locally Funded Initiative MOU" option in the menu to the right. On the right side, the "Locally Funded Initiative MOU" page is displayed. The "Create" button is highlighted with a red box, and a dropdown menu is open showing the "LFI MOU V3 DocuSign" workflow selected. Below the dropdown, a table is visible with columns: "Stage", "% Project Co...", "% Local Initia...", "Total LFI Estimate", and "St". The table contains one row with the value "Design Develo..." under "Stage", "50" under "% Project Co...", "50" under "% Local Initia...", and "0.00" under "Total LFI Estimate". The status "Pe" is visible at the end of the row. The total count at the bottom of the table is "Total: 1".

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 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=ulfim&fromSource=simple&fromModelId=1&wftel=110%

File Edit View Actions Help

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

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,Bill Schwertfager, Task Notes:

Cc... [Workflow Progress](#)

Send For: **Funding Plan**

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
- ▶ Verify Workflow Action
- ▶ “To” box will populate with recipient of record
- ▶ Click Send

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=ulfim&fromSource=simple&fromModelId=1&wftel 110%

File Edit View Actions Help

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

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,Bill Schwertfager,

Cc...

Send For: Funding Plan

Task Notes:

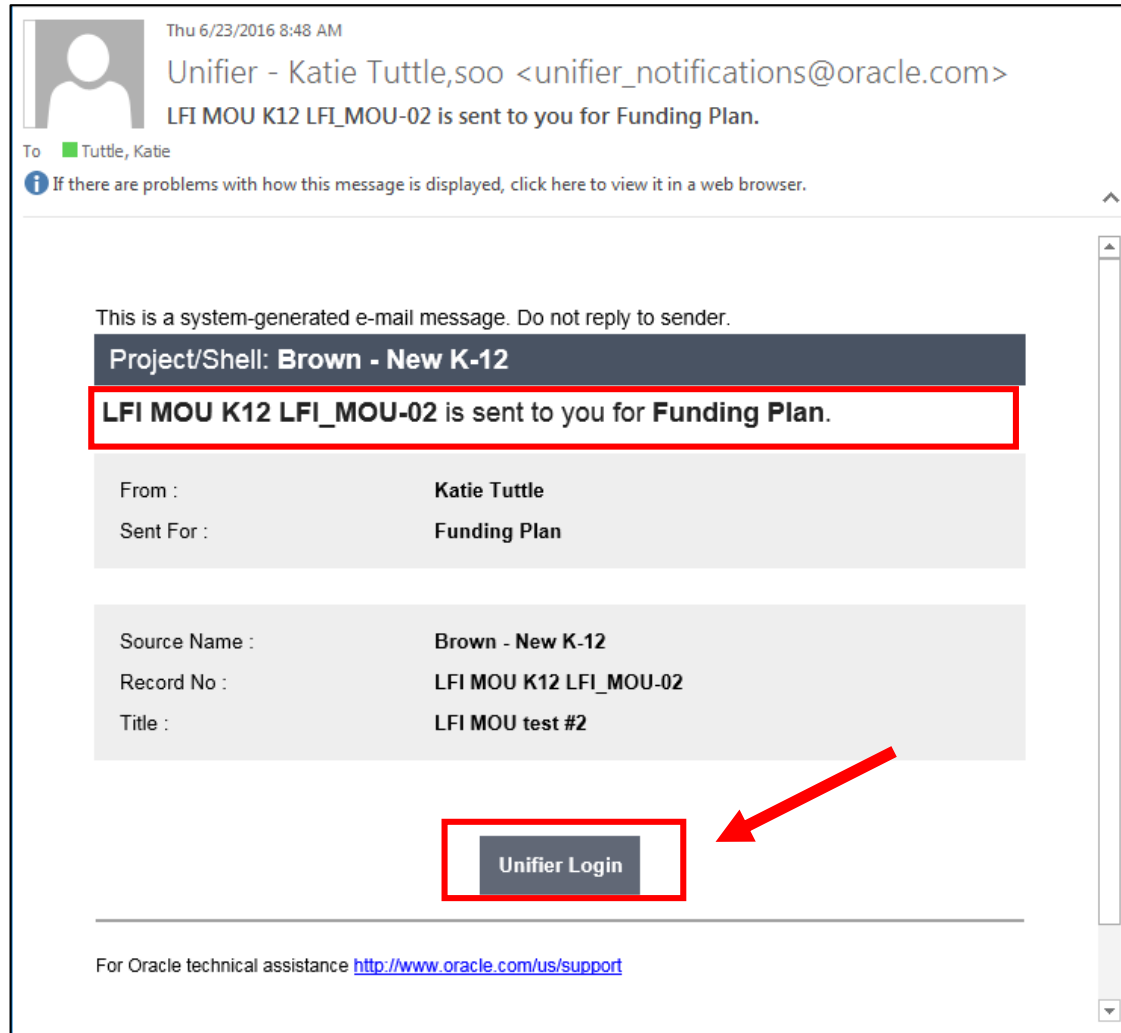
[Workflow Progress](#)

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

Funding Plan Step- District Treasurer

Receive an Email

- ▶ Click the “Unifier Login” button to access your Task



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 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 a form with the following fields:

General	
Project Number:	SFC-080001.01
Record Number:	LFI-01
Project Name:	Oak Hills Local Building Project
Creator:	Katie Tuttle
Organization Name:	
Creation Date:	02/22/2017 08:36 AM (UTC-8)
Facility Name:	
Status:	Pending
County:	
Title:	LFI MOU #1
Stage:	Design Development

Below the General section is the "OSFC Scope of Work" section, which includes a text area for "OSFC Scope of Work" containing the text "Scope of work here".

Below the OSFC section is the "Local Initiative Scope of Work" section, which is currently empty.

At the bottom of the form is the "Task Details" section, which includes the following information:

From:	Katie Tuttle;	Task Due Date:		Task Notes (0)
To:	District Treasurer, Archana Atrey; More..	Task Status:	Not Started	Workflow Progress
Cc:				
Sent For:	Funding Plan			

At the bottom of the browser 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)

Locally Funded Initiative MOU - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186955&model=ulfim&project_id=1086&initiateBP=&bulkautoaccept=&fromRefLog=& 110%

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Undo Accept Task Add Attachment Discussion Review Close Window

Locally Funded Initiative MOU

Non-Construction Costs (\$): 0.00

Total LFI Estimate (\$): 0.00

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: 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	

Proportional Sharing Percentages

% Project Construction Fund: 50

% Local Initiative Fund: 50

Proportion Check (Must = 100): 100

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

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:
Workflow Progress

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

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 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186955&model=ufim&project_id=1086&initiateBP=&bulkautoaccept=&fromRefLog=& 110%

File Edit View Actions Help

Workflow Actions Submit Funding Plan Send Save Spelling.. Undo Accept Task Add Attachment Discussion Review Close Window

LFI MOU Submit Funding Plan Return for Clarification

Locally Funded Initiative MOU

Costs (\$): 0.00

Total LFI Estimate (\$): 0.00

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:	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

Proportional Sharing Percentages

Action Details

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

To... Archana Atrey, Barbara Taylor, Bill Schwertfager,

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