



# Miscellaneous Commits

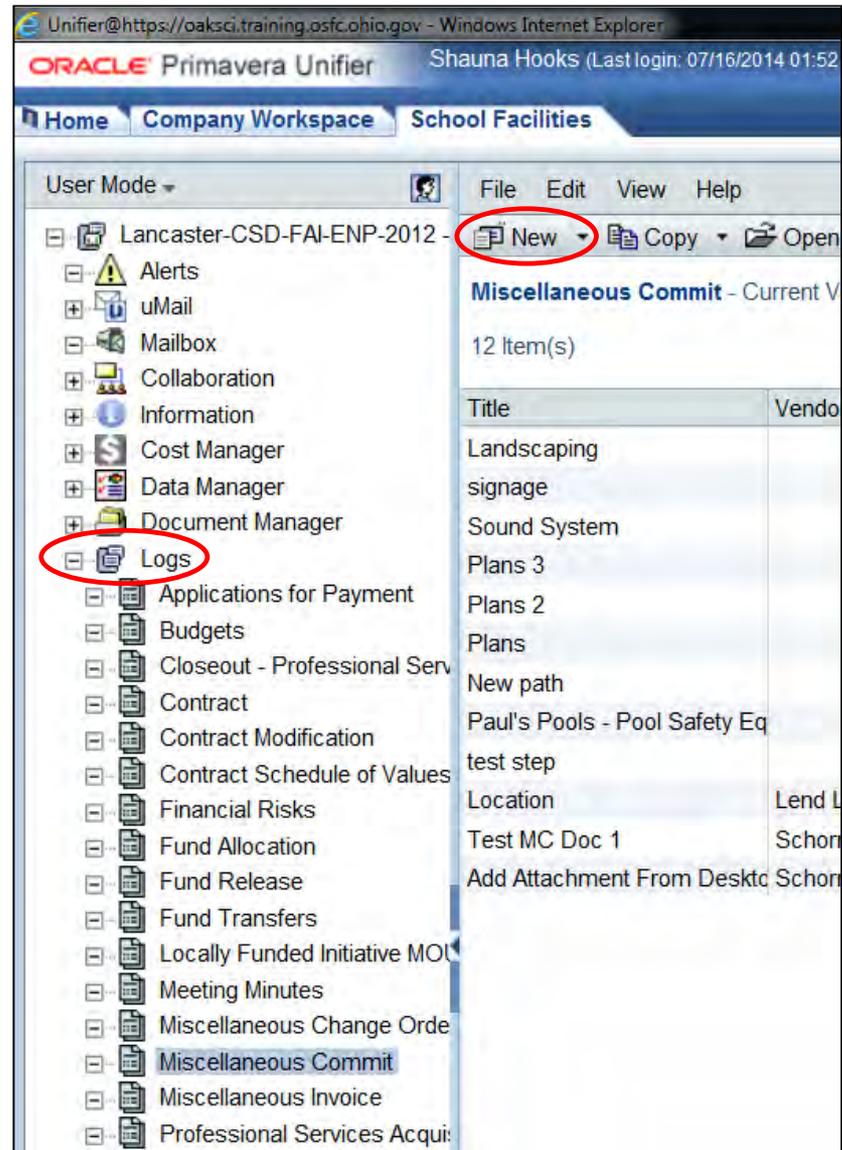
## K-12 Legacy

# 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 record your Purchase Order in Oaks CI navigate to:
  - ▶ Logs -> Miscellaneous Commit
  - ▶ Click New



# Add Information

- ▶ Click the General tab to expand the upper form

General

Project Number:	SFC-130322	Record Number:	
Project Name:	Lancaster-CSD-FAI-ENP-2012	Creator:	Shauna Hooks
Organization Name:	Lancaster City School District	Creation Date:	
Facility Name:	North Elementary School	Status:	
Title:	25 Chuckies Chairs *	EDGE Certified Prime?:	No
Vendor:	Select...		
Vendor Name:	Chuckies Chairs Inc.		
Prevailing Wage:	N/A *		

Description

Description: classroom chairs

Additional Information

Amount (\$):	2,500.00 *
Line Item Total (\$):	0.00
Difference (\$):	2,500.00
Total I FI Share (\$):	0.00

Action Details

Line Item List

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 - Project No. SFC-130322 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

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

**General** Miscellaneous Commit

General

Project Number: SFC-130322 Record Number:

Project Name: Lancaster-CSD-FAI-ENP-2012 Creator: Shauna Hooks

Organization Name: Lancaster City School District Creation Date:

Facility Name: North Elementary School Status:

Title: 25 Chuckies Chairs \*

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

Vendor Name: Chuckies Chairs Inc.

Prevailing Wage: N/A \*

Description

Description: classroom chairs

Additional Information

Amount (\$):	2,500.00 *
Line Item Total (\$):	0.00
Difference (\$):	2,500.00
Total I FI Share (\$):	0.00

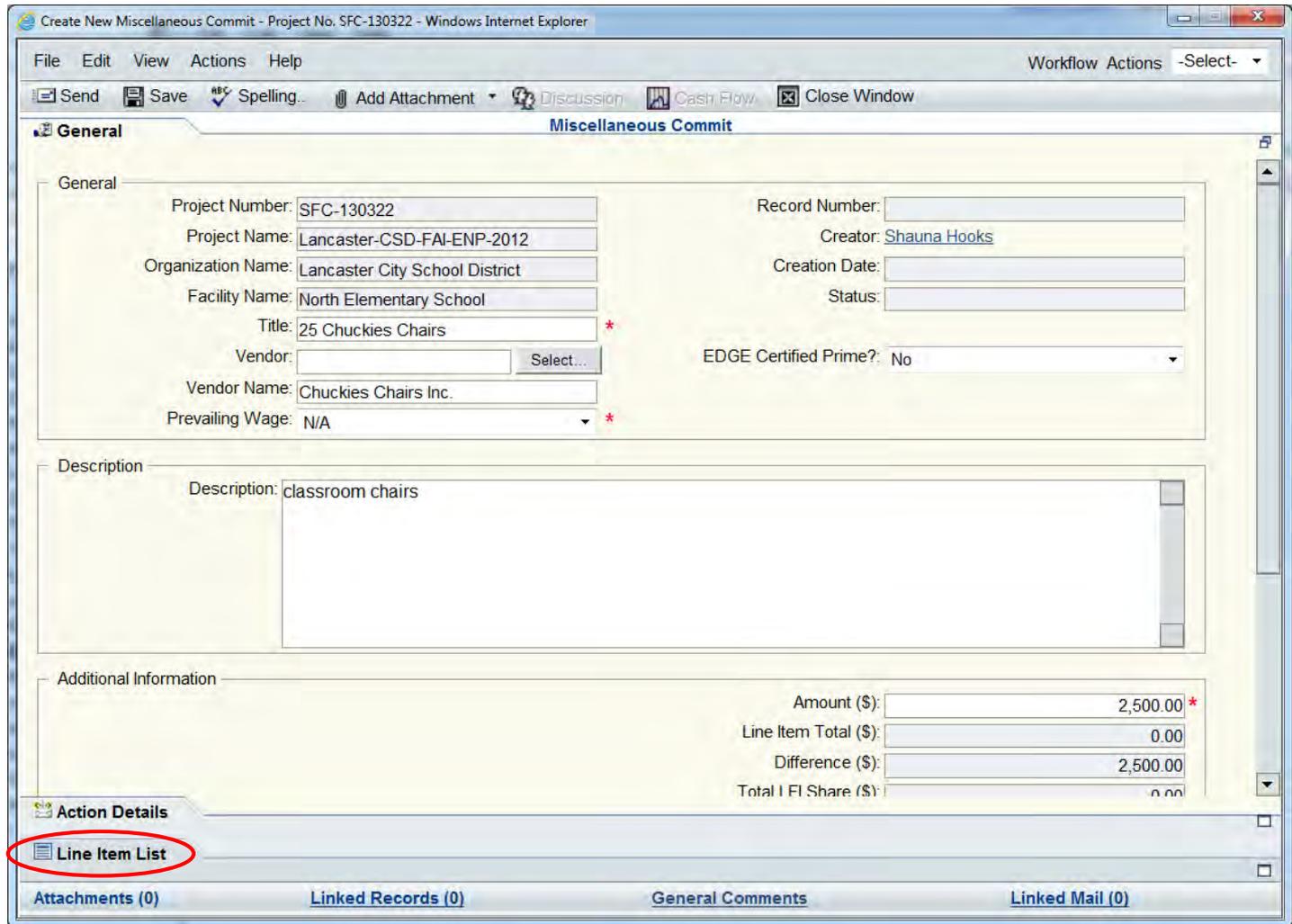
Action Details

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



Windows Internet Explorer

Create New Miscellaneous Commit - Project No. SFC-130322

File Edit View Actions Help

Workflow Actions -Select-

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

**Miscellaneous Commit**

**General**

General

Project Number: SFC-130322 Record Number:

Project Name: Lancaster-CSD-FAI-ENP-2012 Creator: Shauna Hooks

Organization Name: Lancaster City School District Creation Date:

Facility Name: North Elementary School Status:

Title: 25 Chuckies Chairs \*

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

Vendor Name: Chuckies Chairs Inc.

Prevailing Wage: N/A \*

Description

Description: classroom chairs

Additional Information

Amount (\$): 2,500.00 \*

Line Item Total (\$): 0.00

Difference (\$): 2,500.00

Total I FI Share (\$): 0.00

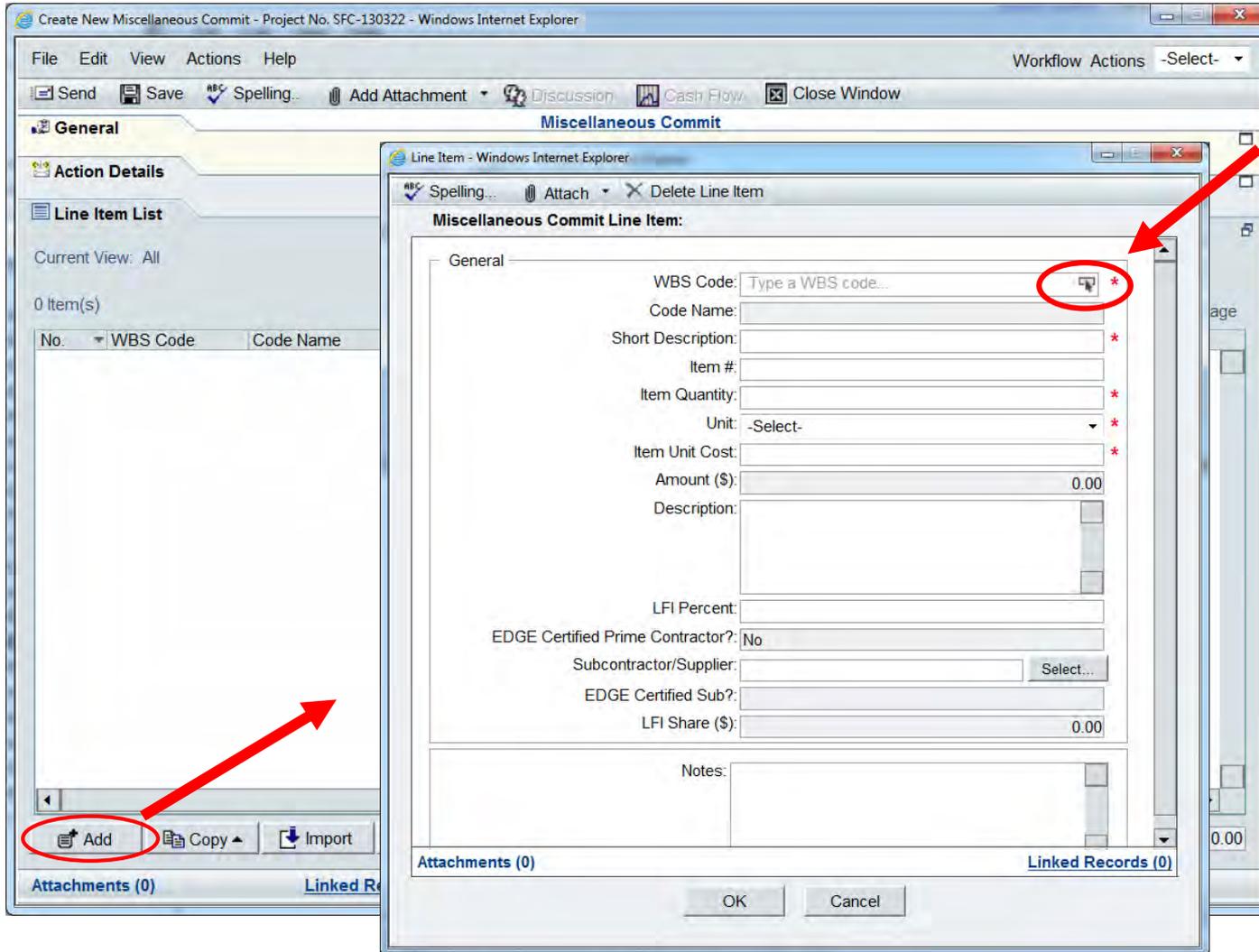
**Action Details**

**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



# Choose WBS Code

- ▶ Click Collapse to simplify the list

The screenshot shows a web browser window titled 'WBS Picker - Windows Internet Explorer' with the URL <https://ohio-train-unifier.oracleindustry.com/bp/>. The browser's toolbar includes buttons for 'Select', 'Expand', 'Collapse', 'Find', and 'Close Window'. The 'Collapse' button is circled in red, and a red arrow points to it. The application displays a table titled 'Select WBS Code' with columns for 'WBS Code' and 'WBS Item'. The table is partially collapsed, showing only the first few levels of the hierarchy. The 'Collapse' button is circled in red, and a red arrow points to it.

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 'ohio-train-unifier.oracleindustry.com'. The top window, titled 'WBS Picker', displays a table of WBS codes. The code 'OR-00-00' is circled in red. A red arrow points from this code to the 'OR-PL-PL' code in the bottom window. The bottom window, also titled 'WBS Picker', shows a detailed view of the 'OR-PL-PL' code, which is highlighted in blue. The 'Select' button in the bottom window is also circled in red.

	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

# Add Line Items

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

Line Item - Windows Internet Explorer

https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=forr

Spelling... Attach Delete Line Item

**Miscellaneous Commit K12 Line Item:**

**General**

WBS Code: OR-PL-PL

Code Name: OR Planning

Short Description: Planning Expense

Amount (\$): \$5,000.00

LFI Percent: 12

Subcontractor/Supplier: Select...

Description: Planning Expense

District: Oak Hills Local SD

Associated Building: Select...

**Details**

EDGE Certified Prime Contractor?:

EDGE Certified Sub?:

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

OK Cancel

# Create a Record

- ▶ 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

# Create a Record

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

Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer

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:

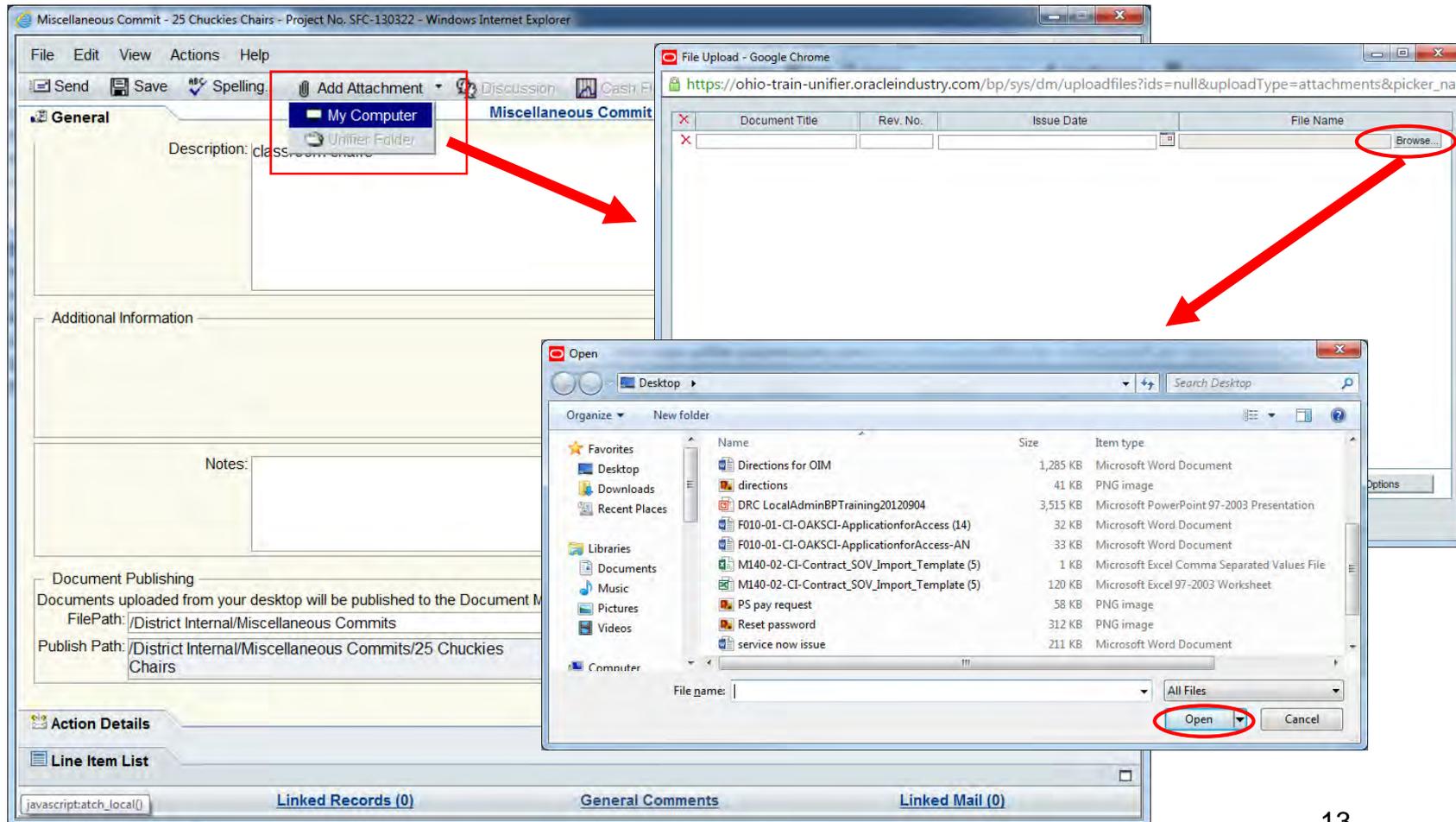
**Action Details**

**Line Item List**

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

# Add Attachments

- ▶ To add any additional documentation
  - ▶ Click Add Attachment
  - ▶ Choose My Computer and locate your documents
  - ▶ Click Open then Click OK



# Complete the Record

- ▶ Click Action Details tab

Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer

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

Workflow Actions: Submit

Submit

Vendor Name: School Planning Services, LLC

Prevailing Wage: -Select-

Description: Planning for school construction

**Submit**

To... Barbara Taylor,Katie Tuttle,Moenique Morris,R

Cc... Barbara Taylor,Katie Tuttle,Moenique Morris,R

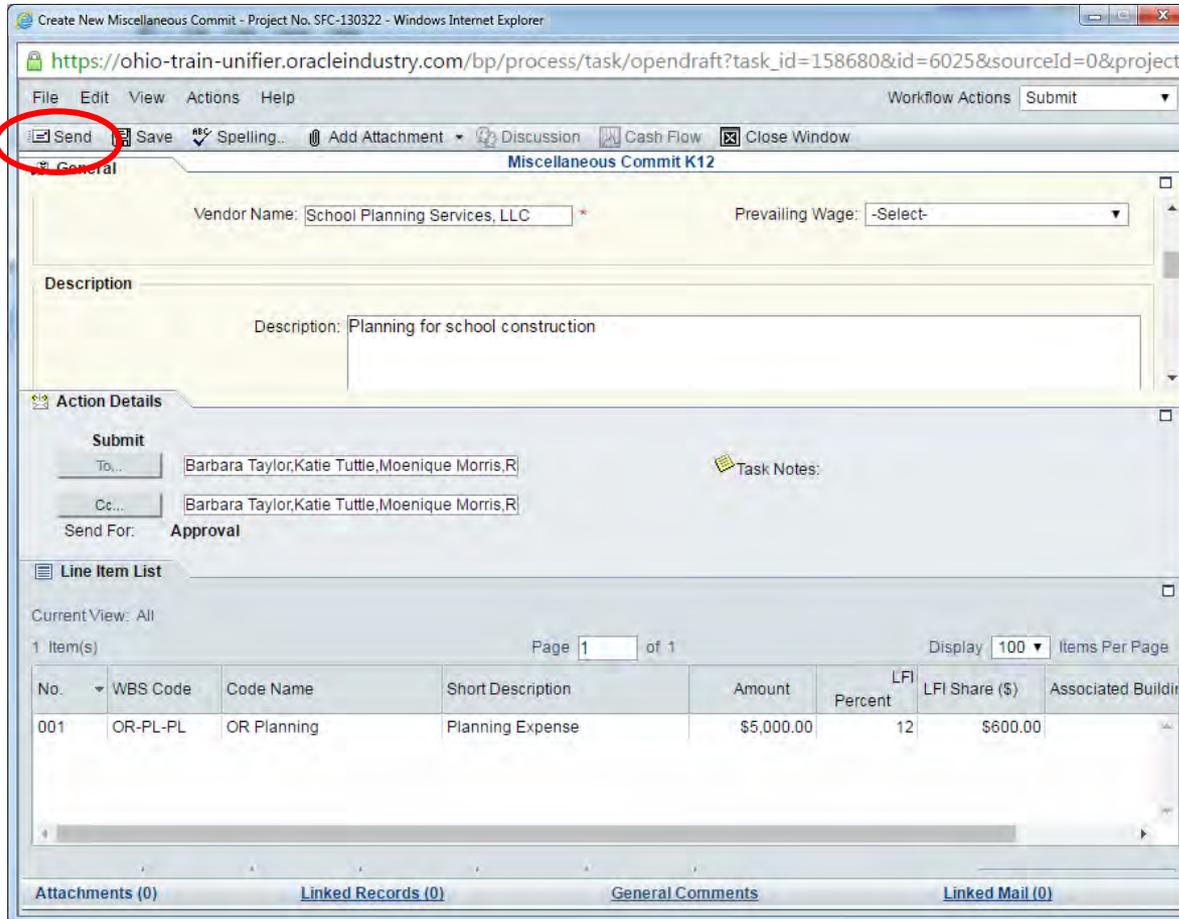
Send For: Approval

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	

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

# Send the Record

- ▶ Click Send



The screenshot shows a web browser window titled "Create New Miscellaneous Commit - Project No. SFC-130322 - Windows Internet Explorer". The address bar shows the URL: [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 toolbar contains buttons for Send, Save, Spelling, Add Attachment, Discussion, Cash Flow, and Close Window. A red arrow points to the "Send" button. The main content area is titled "Miscellaneous Commit K12" and includes a "General" tab with fields for Vendor Name (School Planning Services, LLC) and Prevailing Wage (-Select-). A Description field contains "Planning for school construction". Below this is an "Action Details" section with a "Submit" button, a "To:" field containing "Barbara Taylor,Katie Tuttle,Moenique Morris,R", a "Cc:" field with the same names, and a "Send For:" field set to "Approval". A "Task Notes:" icon is also present. At the bottom, there is a "Line Item List" section showing a table with one item.

No.	WBS Code	Code Name	Short Description	Amount	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)".

# 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