



# Purchase Orders

## K-12 Legacy

# Purchase Orders

- ▶ Purchase Orders

- ▶ Used to Support:

- ▶ Contract

- ▶ Contract Modification

- ▶ Miscellaneous Commit: Acts as a contract in OAKS CI for vendors whom will not hold a contract in OAKS CI.

# **Contract and Purchase Order**

# Contracting

## – Workflow Process Overview

Created by: **Project Coordinator** → Submitted to: **Vendor** → Sent to: **PM Review** →  
Sent to: **PM Supervisor Review** → **SCHOOL DISTRICT**

- ▶ **School District Treasurer**

1. Print and Sign the attached Contract
2. Also attain School Board President Signature
3. Attach signed contract to Contract Record in OAKS CI
4. Add Board Resolution number and date to Contract Record
5. Create a **Purchase Order** in district's financial system of record
6. Record PO in OAKS CI
7. Attach PO to Contract Record in OAKS CI
8. Submit Contract Record to OFCC Director

# Contracting

- ▶ The District Treasurer will receive a Task notification via email indicating that a Contract or Miscellaneous Commit is awaiting review.
  - ▶ **For this training we will discuss the Contract record**

# District and Building Level Access

The screenshot shows the Primavera Unifier web interface. The user is logged in as Shauna Hooks. The navigation tabs include Home, Company Workspace, Projects, and School Facilities. The 'View' menu is highlighted with a red arrow. A red box contains the text 'District and Building Level Project Access'. The main content area displays a table of tasks and uMails for various projects.

**Announcements:**

**Items Requiring Your Attention:**

- Tasks: 42 Total, 34 New, 5 Late
- Messages: 0 New
- Draft Records: 10 New
- uMails: 3 New

**Tasks or New uMails:**

Number	Name	Tasks	uMails	Company Name
OCI-130101	School Facilities Training 1	28 Total, 24 New, 2 Late	3 New	Ohio School Facilities
OCI-130007	UAT 8 Rel 1 - Eaton	4 Total, 1 New, 3 Late		Ohio School Facilities
OCI-130006	UAT 7 Rel 1 - Deaf and Blind	1 Total, 1 New, 0 Late		Ohio School Facilities
OCI-130005	UAT 6 Rel 1 - Louisville	1 Total, 1 New, 0 Late		Ohio School Facilities
OCI-130003	UAT 2 Rel 1 - Dayton STEM	4 Total, 3 New, 0 Late		Ohio School Facilities
OCI-130002	UAT 5 Rel 1 - Toronto	4 Total, 4 New, 0 Late		Ohio School Facilities

# District Level Access

The screenshot shows the Primavera Unifier interface for School Facilities. The browser address bar indicates the user is logged in as Shauna Hooks. The interface includes a navigation menu with 'Home', 'Company Workspace', 'Projects', and 'School Facilities'. The main content area displays a 'District Project' view with a table of 5 items. A red callout box points to the 'View: District Project' dropdown, stating: 'District view will allow you to view all School Districts you may access'. Another red callout box points to a row in the table, stating: 'Double Clicking the District will take you to the district homepage'.

District Project Identifier	District	OAKS Code	Setup Date	Status
Brookfield-LSD-TRU-CFAP-2007	Brookfield Local SD	SFC-	09/25/2013	Active
Lancaster-CSD-FAI-ENP-2012	Lancaster City SD	SFC-130322	09/16/2013	Active
Napoleon-CSD-	Napoleon Area City SD	SFC-120306	09/16/2013	Active
National Trail-LSD-1990 Lookback-1-20	National Trail Local SD	SFC-130316	09/16/2013	Active
South-Western-CSD-FRA-CFAP-2012	South-Western City SD	SFC-130315	09/16/2013	Active

# Building Level Access

The screenshot shows the Primavera Unifier web application interface. The browser address bar displays the URL `Unifier@https://oaksci.training.osfc.ohio.gov`. The user is logged in as Shauna Hooks. The application has a navigation menu with 'Home', 'Company Workspace', 'Projects', and 'School Facilities'. The 'School Facilities' section is active, showing a 'School Facilities - Home' page. A red box highlights the text: 'Building Project view will allow you to view all School Districts you may access'. Below this, the 'View: Building Project' dropdown is visible. The main content area shows a table of building projects with the following data:

Number	Name	Setup Date	Status
SFC-130322.02	Central Elementary	09/23/2013	Active
SFC-130315.17	Prairie Norton Elementary	09/20/2013	Active
SFC-120306.6	Napoleon Area City School District	09/19/2013	Active
SFC-???????.01	Brookfield K-12	09/25/2013	Active

A red box highlights the text: 'Double Clicking the Building project will take you to the Building project's homepage', with an arrow pointing to the first row of the table.

# Building Project Home Page

Unifier@https://oaksci.training.osfc.ohio.gov - Windows Internet Explorer

ORACLE Primavera Unifier Shauna Hooks (Last login: 10/08/2013 09:21 AM) Community Bookmarks Preferences Support Logout

Home Company Workspace Projects School Facilities

School Facilities > Lancaster-CSD-FAI-ENP-2012 > Central Elementary

User Mode

File Edit View Help

Central Elementary - Home View Dashboard My Dashboard

Summary

Image

Details

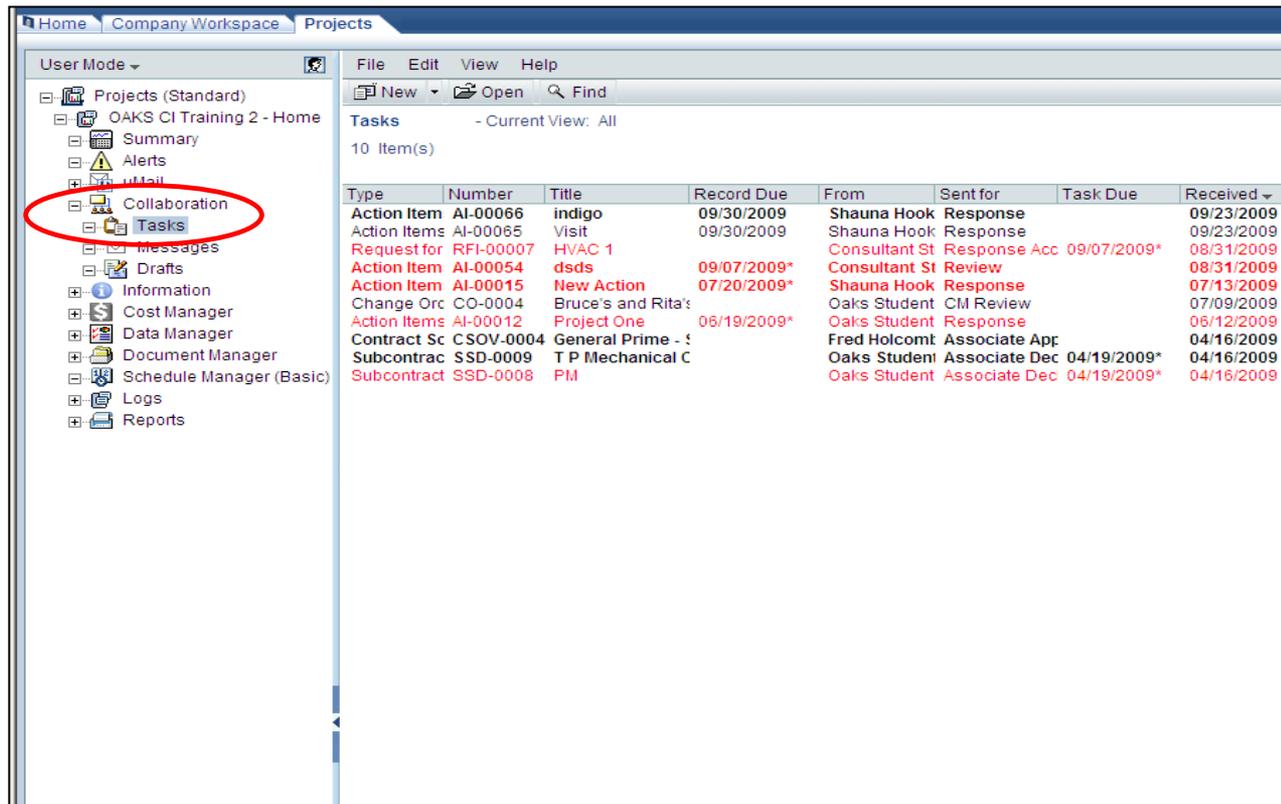
Number:	SFC-130322.02
Name:	Central Elementary
Description:	New Elementary School
Administrat	Steve Mayo
or:	
Currency:	United States Dollar (USD)
Status:	Active
Email	1015-
Address:	oaksci@socccemsntp.em.ohio.gov

Most work is completed in 3 areas:

- Collaboration- Your Work**
- Document Manager- Your supporting documentation**
- Logs- Where records are housed and created**

# Task Action

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



The screenshot shows a software interface with a left-hand navigation pane and a main content area. The navigation pane is titled 'Projects (Standard)' and contains several folders, including 'OAKS CI Training 2 - Home', 'Collaboration', and 'Tasks'. The 'Tasks' folder is circled in red. The main content area is titled 'Tasks' and displays a table of 10 items. The table has the following columns: Type, Number, Title, Record Due, From, Sent for, Task Due, and Received. The data in the table is as follows:

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Action Item	AI-00066	indigo	09/30/2009	Shauna Hook	Response		09/23/2009
Action Items	AI-00065	Visit	09/30/2009	Shauna Hook	Response		09/23/2009
Request for	RFI-00007	HVAC 1		Consultant St	Response Acc	09/07/2009*	08/31/2009
Action Item	AI-00054	dsds	09/07/2009*	Consultant St	Review		08/31/2009
Action Item	AI-00015	New Action	07/20/2009*	Shauna Hook	Response		07/13/2009
Change Orc	CO-0004	Bruce's and Rita's		Oaks Student	CM Review		07/09/2009
Action Items	AI-00012	Project One	06/19/2009*	Oaks Student	Response		06/12/2009
Contract Sc	CSOV-0004	General Prime - !		Fred Holcomt	Associate App		04/16/2009
Subcontrac	SSD-0009	T P Mechanical C		Oaks Student	Associate Dec	04/19/2009*	04/16/2009
Subcontract	SSD-0008	PM		Oaks Student	Associate Dec	04/19/2009*	04/16/2009

# Task Action

- ▶ Click Accept Task to begin work on your Task

Contract - HooksRimer Architects A/E - Project No. OCI-140001 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

**Accept Task** Decline Task Close Window

Contract K12

**General**

General

Project Number: OCI-140363.01 Record Number: CON-001  
Project Name: Talawanda- Kramer Elementary Creator: Katie Tuttle  
Organization Name: Talawanda CSD Creation Date: 04/07/2016 07:24 AM (UTC-8)  
Facility Name: Kramer Elementary (Talawanda) Status: Pending  
Title: Katie's Contracting Contract Type: CM at Risk

**Task Details**

From: [Katie Tuttle](#); Task Due Date: Task Notes (0)  
To: [District Treasurer:Ashwin Dasanahalli](#); Task Status: [Not Started](#)  
Cc: [More...](#)  
Sent For: School District Contract Execution

**WBS Detail**

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount
001	CMR-CM-SV	CM-R Contract Awarded SOV Pendin	Contract Amount	\$500,000.00

Total Amount: \$500,000.00

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

# Treasurer

- ▶ What happens at this step?
  - ▶ Review the Contract and Attachments
  - ▶ Sign the Contract and attain signature from the Board President
  - ▶ Attach the Signed Contract to the Contract Record in OAKS CI
  - ▶ Obtain funding and Board Resolution

# Print and Sign Attached Contract

- ▶ Review Instructions
- ▶ Print Attached Contract and sign, attain signature from Board President

Contract - HooksRimer Architects A/E - Project No. OCI-140001 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion Close Window

General Contract K12

Sign the contract, scan it, upload it to the document manager, and attach it to this record. The board resolution and PO information should be entered before forwarding this record to OFCC.

General

Project Number: SFC-080001.01 Record Number: CON-003

Action Details

(Click here to view latest content)

To...  
Cc...  
Send For:

Task Notes:

WBS Detail

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount
001	CE-FC-BE	Facility Construction Budget	Facility Construction	\$50,000.00

Add Copy Import Remove Grid Find Total Amount: \$50,000.00

Attachments (1) Linked Records (0) General Comments Linked Mail (0)

# School Board Resolution and Funding

- ▶ Click General Tab to expand upper form
- ▶ Scroll down to the School Board Resolution number and date and complete the fields

Contract - HooksRimer Architects A/E - Project No. OCI-140001 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Close Window

**General** Contract

Certificate of Insurance:  Certificate of Insurance: SKH

Proof of Licensing:  Proof of Licensing: SKH

EEO Requirement:  EEO Requirement: SKH

**School Board Resolution**

Attach a copy of the School Board Resolution to this record.

School Board Resolution Number: 78912345 School Board Resolution Date: 02/05/2016

These fields are autopopulated based on work flow actions taken.

Vendor Signature: Shauna Hooks	Vendor Action: Sign Agreement	Vendor Signature Date: 03/03/2014 10:14 AM Lg
Treasurer's Signature:	Treasurer's Action:	Treasurer Signature Date:
School District Signature:	School District Action:	School District Signature Date:
CoP Recommendation:	CoP Action:	CoP Recommendation Date:
OSFC Signature:	OSFC Action:	OSFC Signature Date:

Purchase Order Details

PO 1 Number: Select... PO 1 Amount (\$): 0.00

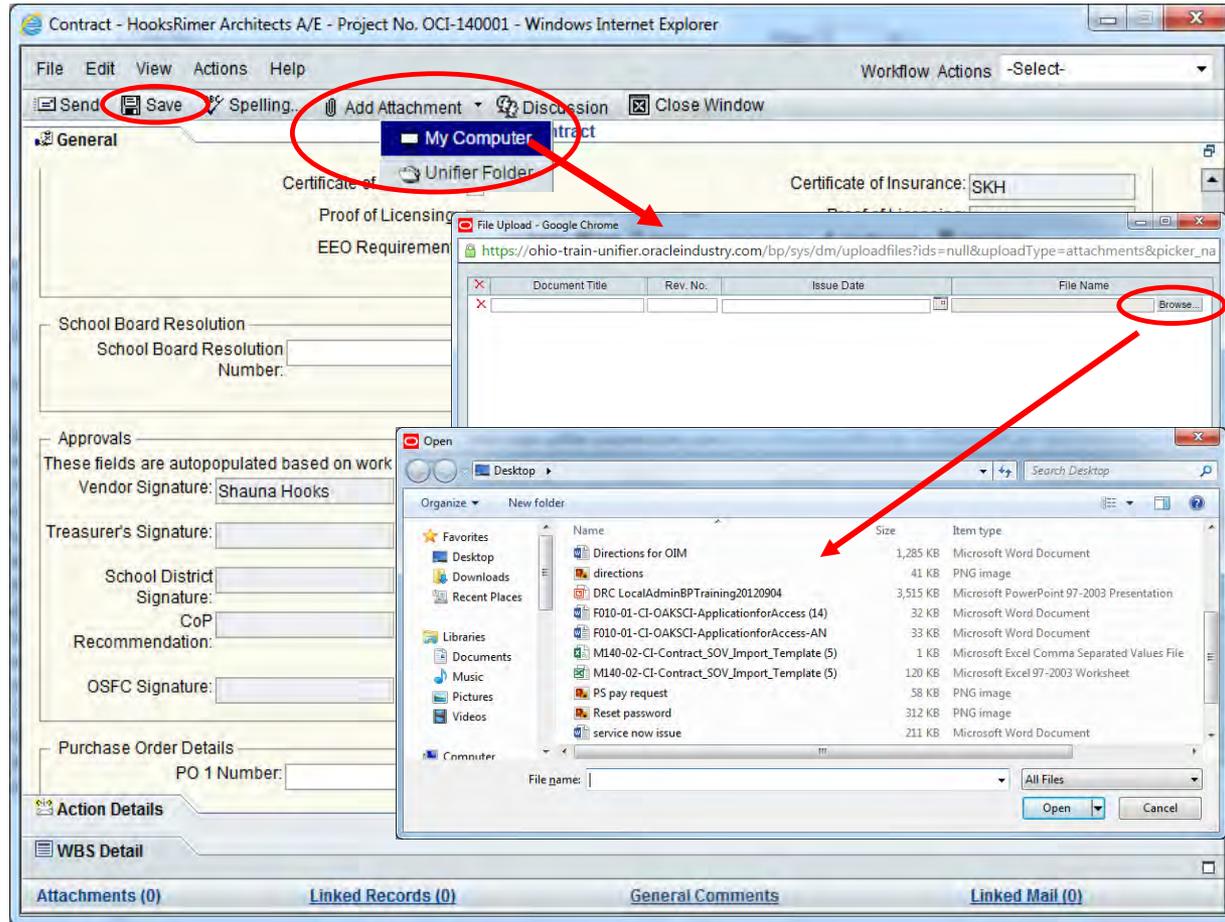
Action Details

WBS Detail

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

# Treasurer Board Resolution and Funding

- ▶ Click **Add Attachment** to attach the signed contract to the record.
- ▶ Click **Save** on this record and **Close Window**.
- ▶ **Now, you must create your Purchase Order in your own financial system of record.**



# Creating a New Purchase Order Record

- ▶ To record your Purchase Order in Oaks CI navigate to:

- ▶ Logs -> Purchase Orders K-12
- ▶ Click New

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL: [https://oaksci.osfc.ohio.gov/bp/nav/main/user#t:'us\\_sf,m:'user',p:1121,k:'upo'](https://oaksci.osfc.ohio.gov/bp/nav/main/user#t:'us_sf,m:'user',p:1121,k:'upo'). The user is identified as Katie Tuttle on behalf of Michael Ashmore, with a last login of 04/18/2016. The navigation tabs include Home, Company Workspace, and School Facilities. The left-hand navigation menu is expanded to show the 'Logs' folder, which is circled in red. A red arrow points from the text 'Click New' to the 'Purchase Orders' item in the menu. The 'New' button in the top menu bar is also circled in red. The main content area displays a table of purchase orders with the following data:

Title	PO Number
Four Seasons Environmental PO	61394
Batavia Elementary School	64713
Contract Amendment	



# Creating a New Purchase Order Record

- ▶ In the PO Details section- Ensure you plug in the Purchase Order number into the Record. Choose OAKS or District for financial system used.
- ▶ Do **NOT** plug in the PO amount until completing slides 58-60
- ▶ Under Notification you can choose to notify additional users
- ▶ Attach any necessary documentation

Create New Purchase Orders - Project No. OCI-140001 - Windows Internet Explorer

File Edit View Help

Finish Editing Save Spelling... Add Attachment Close Window

General Purchase Orders K12

PO Details

OAKS PO No.: 58475

PO Date:

Date Dispatched:

Financial System of Record: -Select-  
-Select-  
OAKS FIN  
Local

Notes:

OAKS PO Amount (\$):  **Not Yet!**  \$0.00

Total Amount (\$):  \$0.00

Line Item Total (\$):  \$0.00

Difference (\$):  \$0.00

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

FilePath:  Purchase Orders

Publish Path:  Purchase Orders/58475

Notification

Notify Additional Users/Groups:

PO Distribution Lines

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

User/Group Picker - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/share/project/picker\_usergroup?UserGroupPickerId=

List Names from: Batavia-LSD-CLE-ENP-2012 Show

Users/Groups - Current View: All

100 Item(s) Page 1 of 1 Display 100 items per page

Name	Company
A_E	
A_E Financial	
All Project Users	

# Fund the PO

- ▶ Click the PO Distribution Lines Tab

The image displays two screenshots of a web application interface for creating purchase orders. The left screenshot shows the 'Purchase Orders K12' window with the 'PO Distribution Lines' tab selected. The right screenshot shows the 'PO Distribution Lines' window with the 'Add' button in the toolbar highlighted with a red circle. A red arrow points from the 'PO Distribution Lines' tab in the left screenshot to the 'Add' button in the right screenshot.

▶ Click Add

# 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 - Internet Explorer  
https://oaksci.osfc.ohio.gov/bp/studio/bp/database/itemopen?a=form.0&id=0&model=upo&schemaid:

Purchase Orders K12 Line Item:

General

Fund Code: OCI-Other-TestFund-0-OCI-1

Fund Name: OCI Test Fund

Short Description: Supplies

Amount (\$): \$350,000.00

Notes:

Hidden

Tab Name:

Attachments (0) [Linked Record](#)

Fund Code - Internet Explorer  
https://oaksci.osfc.ohio.gov/bp/fsm/company/funding/listview/picker?allocated\_funds=true&projectId=1121

Open Find Close Window

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 Fund	OCI
SFC-State-Approp-C23014-SFC100000-8950B	Classroom FACilities Assistance Prog	SFC

# Fund the PO

- ▶ When all lines are added, your lines will show up in the PO Distribution Lines tab

The screenshot shows a web application window titled "Create New Purchase Orders - Project No. OCI-140001 - Windows Internet Explorer". The 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 the active tab. Below the tabs, it indicates "Current View: All" and "2 Item(s)" on "Page 1 of 1", with a "Display 100 Items Per Page" dropdown. A table lists the distribution lines:

No.	Fund Code	Fund Name	Amount
002	SFC-State-Approp-C23014-SFC100000-8950B	Classroom Facilities Assista	\$250,000.00
001	OCI-Other-TestFund-0-OCI-1	OCI Test Fund	\$250,000.00

At the bottom of the window, there is a toolbar with "Add", "Copy", "Import", "Remove", "Grid", and "Find" buttons. A "Total Amount:" field shows "\$500,000.00". 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**
- ▶ Click Finish Editing

Windows Internet Explorer window: Create New Purchase Orders - Project No. OCI-140001

Menu: File Edit View Help

Buttons: Finish Editing (circled), Save, Spelling..., Add Attachment, Close Window

Tab: General (selected)

Section: Purchase Orders K12

Section: PO Details

Fields:

- OAKS PO No.: 58475
- PO Date: [ ]
- Date Dispatched: [ ]
- Financial System of Record: OAKS FIN
- OAKS PO Amount (\$): \$500,000.00
- Total Amount (\$): \$500,000.00
- Line Item Total (\$): \$500,000.00
- Difference (\$): \$0.00

Section: Document Publishing

Text: Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Fields:

- FilePath: Purchase Orders
- Publish Path: Purchase Orders/58475

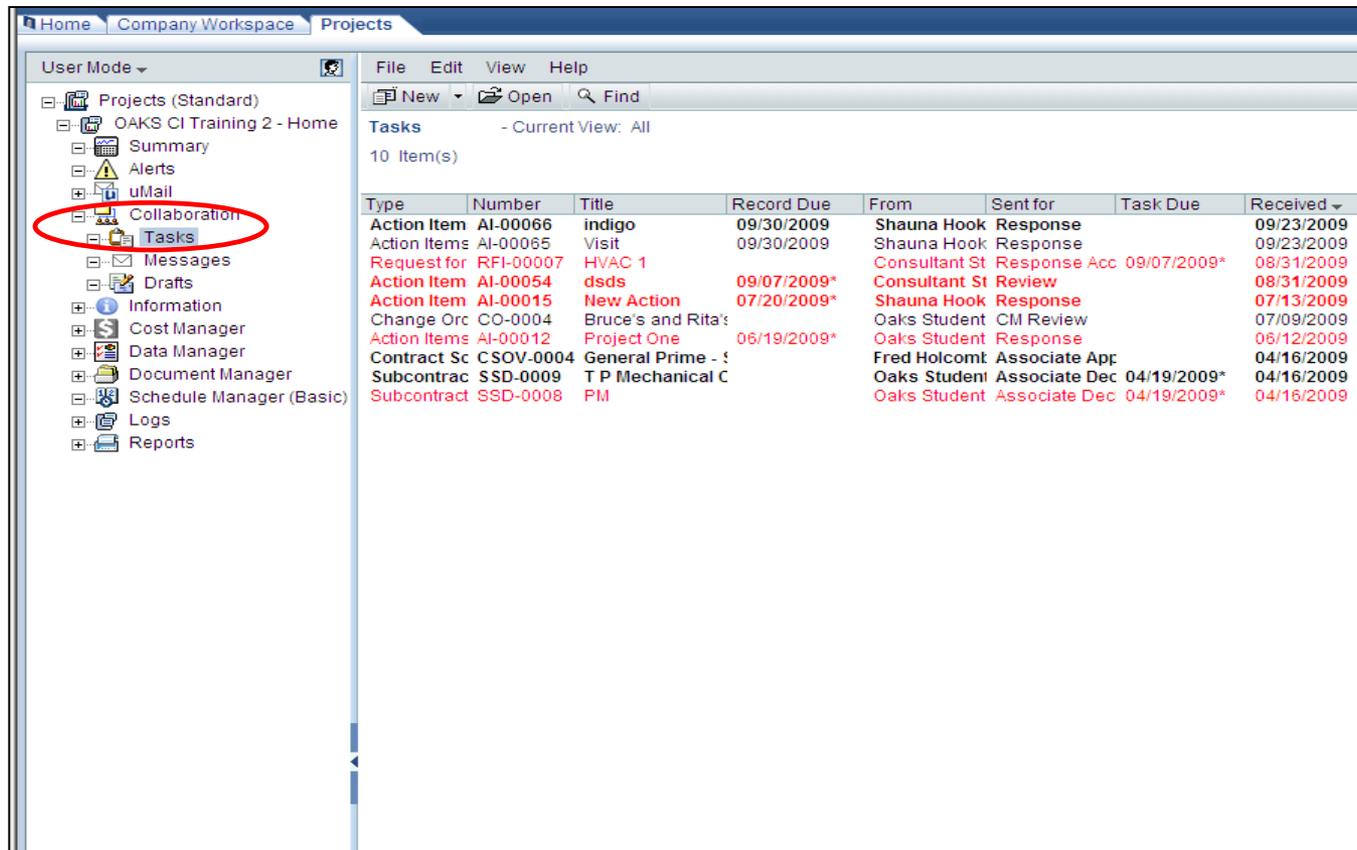
Section: Notification

Section: PO Distribution Lines

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

# Completing the Contract Record

- ▶ Now you are ready to complete your Contract Record.
- ▶ Go back to Collaboration, Click Tasks
- ▶ Double-click on your Contract to open



The screenshot shows a software application window titled 'Projects' with a 'Company Workspace' tab. The left sidebar contains a tree view of folders, with 'Collaboration' and its sub-folder 'Tasks' circled in red. The main area displays a 'Tasks' list with 10 items. The table below is a representation of the data shown in the screenshot.

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Action Item	AI-00066	indigo	09/30/2009	Shauna Hook	Response		09/23/2009
Action Items	AI-00065	Visit	09/30/2009	Shauna Hook	Response		09/23/2009
Request for	RFI-00007	HVAC 1		Consultant St	Response Acc	09/07/2009*	08/31/2009
Action Item	AI-00054	dsds	09/07/2009*	Consultant St	Review		08/31/2009
Action Item	AI-00015	New Action	07/20/2009*	Shauna Hook	Response		07/13/2009
Change Orc	CO-0004	Bruce's and Rita's		Oaks Student	CM Review		07/09/2009
Action Items	AI-00012	Project One	06/19/2009*	Oaks Student	Response		06/12/2009
Contract Sc	C SOV-0004	General Prime - :		Fred Holcomt	Associate App		04/16/2009
Subcontract	SSD-0009	T P Mechanical C		Oaks Student	Associate Dec	04/19/2009*	04/16/2009
Subcontract	SSD-0008	PM		Oaks Student	Associate Dec	04/19/2009*	04/16/2009

# Link the PO to the Contract Record

- ▶ Navigate to the Purchase Order details section
- ▶ Click Select next to PO 1 Number and plug in the appropriate Purchase Order that was created in OAKS CI

The screenshot shows two overlapping browser windows. The top window, titled 'Contract - HooksRimer Architects A/E - Project No. OCI-140001 - Windows Internet Explorer', displays a 'Contract K12' record. The 'Purchase Order Details' section is highlighted with a red box and contains the following information:

PO Number	PO 1 Amount (\$)	PO 2 Amount (\$)	PO 3 Amount (\$)	PO 4 Amount (\$)	PO 5 Amount (\$)	Total Amount (\$)
58475	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

The bottom window, titled 'Purchase Orders - Batavia Elementary School - Project No. SFC-130336 - Internet Explorer', shows a list of purchase orders. A red arrow points from the 'Select...' button next to PO 1 Number (58475) in the top window to the 'Test PO' entry in the bottom window's table.

Title	PO Number	Total Amount (\$)	Contract Name	Status	Record Number
Test PO	58475	0.00		Dispatched	PO-003
Morris Test	Test 1	350,000.00		Dispatched	PO-002
Test - CMR	072215	500,000.00		Dispatched	PO-001

# Sign the Contract Record

- ▶ Make sure the final signed contract is attached and the School Board Resolution is attached
- ▶ To move the record forward:
  - ▶ Choose Workflow Action
  - ▶ Click Send

Contract - HooksRimer Architects A/E - Project No. OCI-140001 - Windows Internet Explorer

File Edit View Actions Help

Workflow Actions Sign Contract Sign Contract Return for Clarification

Send Save Spelling... Add Attachment Discussion Close Window

Contract K12

**General**

**Purchase Order Details**

PO 1 Number:	58475	Select...	PO 1 Amount (\$):		\$0.00
PO 2 Number:		Select...	PO 2 Amount (\$):		\$0.00
PO 3 Number:		Select...	PO 3 Amount (\$):		\$0.00
PO 4 Number:		Select...	PO 4 Amount (\$):		\$0.00
PO 5 Number:		Select...	PO 5 Amount (\$):		\$0.00
Total Amount (\$):					\$0.00

**Vendor Information**

Contractor Name:	Joe General Contractor	Vendor Legal Name:	
Federal Tax ID:		Vendor Address 1:	
Vendor Contact:	Student 1	Vendor Address 2:	
Vendor Contact Phone:		Vendor City:	
Vendor Contact Fax:		Vendor State:	Ohio
Vendor Contact Email:	oci1@das.state.oh.us	Vendor ZIP:	
Trade:	General Contractor	EDGE Certified Prime?:	Yes
Other Description:		Joint Venture:	

**Action Details**

**WBS Detail**

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

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211