

OAKS CI

Capital Improvements (Management System)

Locally Funded Initiative MOU

Roles and Responsibilities

- Creation– Project Manager, will utilize information provided to them to create the record
- Funding Plan – District Treasurer will sign and process the record
- District Signature– District Superintendent will sign and process the record
- OSFC Signature– Project Manager will sign and process the record
- Funding Approval– OFCC Fiscal will approve and process record

Create the LFI MOU

In this step, the PM creates a new LFI MOU record, saves it , creates a custom print for signatures. The PM then submits to the District Treasurer.

Create the LFI MOU

- Log into OAKS CI
- Choose your Project
- Click Logs > Locally Funded Initiative
- Click New
- Choose the appropriate workflow—if there is no LFI for the contract choose zero LFI

The screenshot displays the OAKS CI web application interface. On the left is a navigation tree with 'Logs' expanded and 'Locally Funded Initiative' selected. The main content area shows a table with one row of data. A blue arrow points to the 'New' button in the top toolbar. An inset dialog box titled 'Select Workflow - Windows Internet Explorer' is open, showing a dropdown menu with 'LFI MOU' selected.

Stage	Project Construction Fund	% Local Initiative Fund	Total LFI Estimate	Status	Record Number
POR	94	6	287,000.00	Pending	LFI-1

Select Workflow - Windows Internet Explorer

Select Workflow

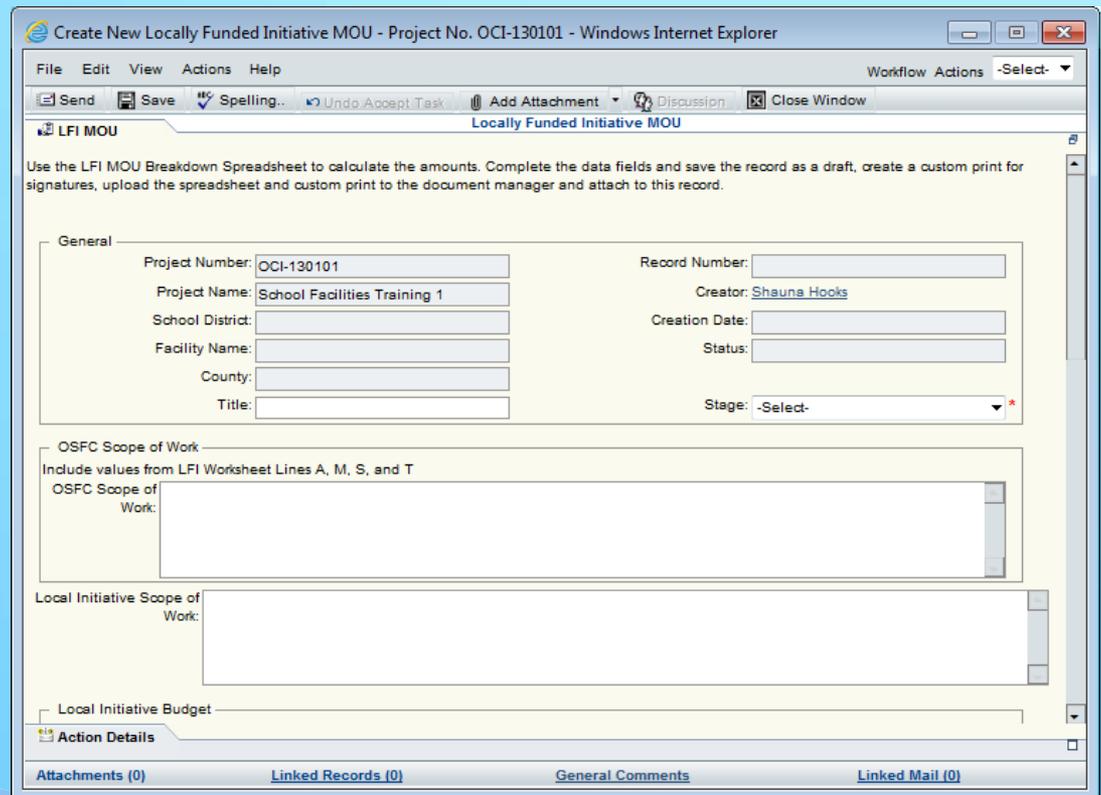
Business Process: Locally Funded Initiative MOU

Workflow: Select

- Select
- LFI MOU
- Zero LFI

Create the LFI MOU

- Complete all open fields



Create New Locally Funded Initiative MOU - Project No. OCI-130101 - Windows Internet Explorer

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: OCI-130101 Record Number:

Project Name: School Facilities Training 1 Creator: [Shauna Hooks](#)

School District: Creation Date:

Facility Name: Status:

County: Stage: -Select-*

Title:

OSFC Scope of Work

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

OSFC Scope of Work:

Local Initiative Scope of Work:

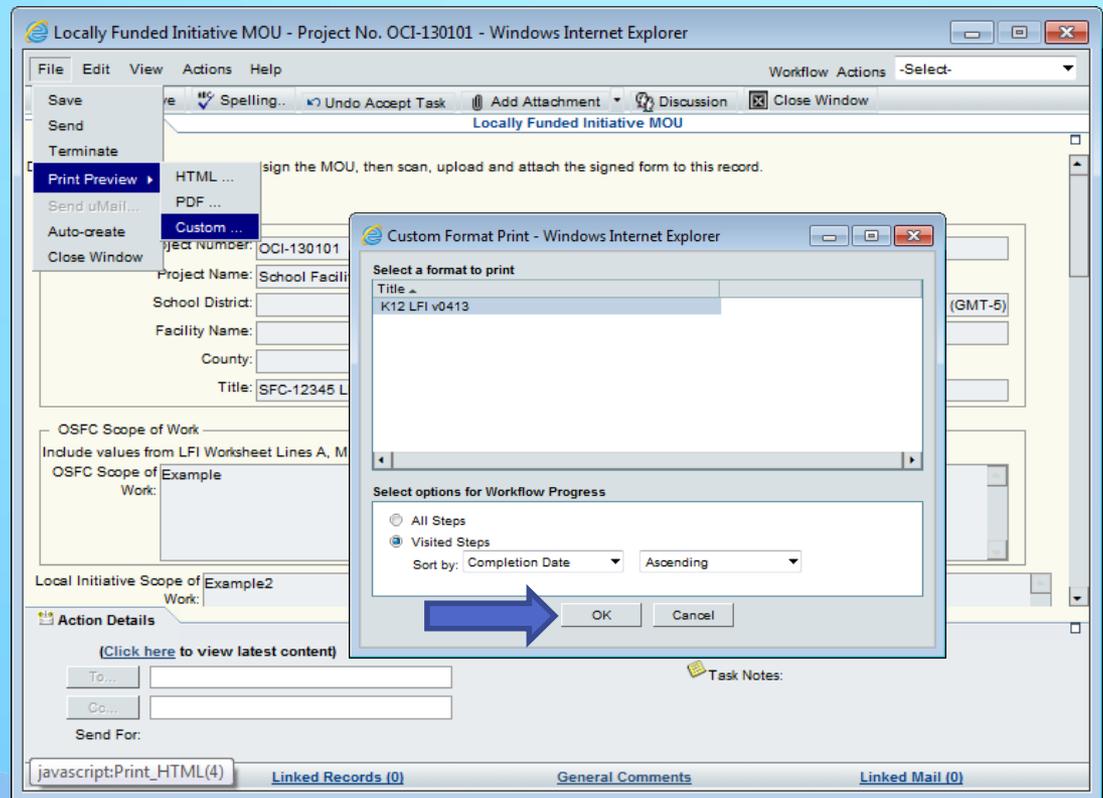
Local Initiative Budget

Action Details

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

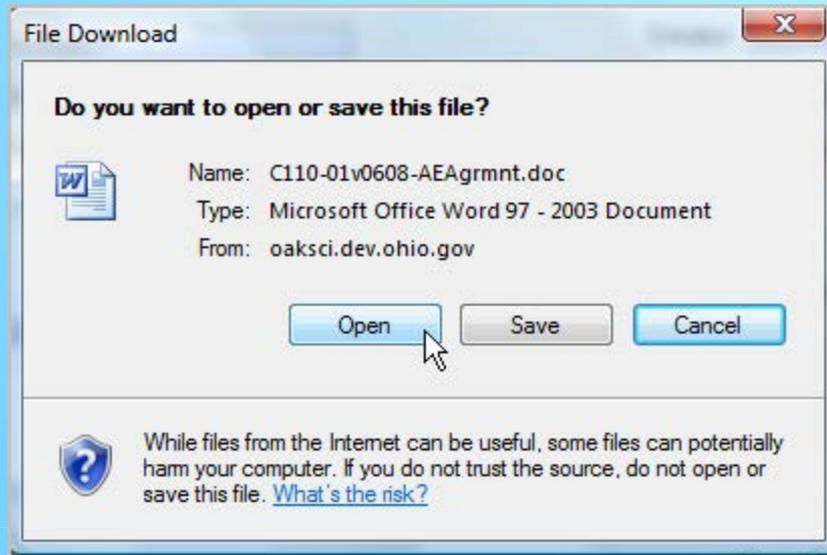
Custom Print

- ▶ Once record is complete
- ▶ Click > File > Print Preview > Custom Print
- ▶ Highlight Title, Click > OK



Custom Format Printing

- ▶ Click Open in the File Download window to open the Word document.
- ▶ Save the document(s) to your computer.



Custom Format Printing

- ▶ Many OAKS CI custom format documents contain “[]” to identify values that could not be populated from the selected record.
- ▶ These must be edited by hand prior to distributing the document.
- ▶ Review the entire document, editing as necessary.
- ▶ Save the completed document to your computer.
- ▶ Repeat for each of the needed documents.

Custom Format Printing

Form Agreement – Local Funded Initiatives Ohio School Facilities Commission Forms and Documents

LFI Stage	SD
School District:	Toronto City School District
County Name:	Jefferson
Building Name:	High School-Toronto
OSFC Scope of Work: <i>-Include values from LFI Worksheet Lines A, M, S, and T</i>	District purchased additional square footage in media center and 10 classrooms.
Local Initiative Scope of Work and Project Name:	UAT 5 <u>Rel 1</u> - Toronto

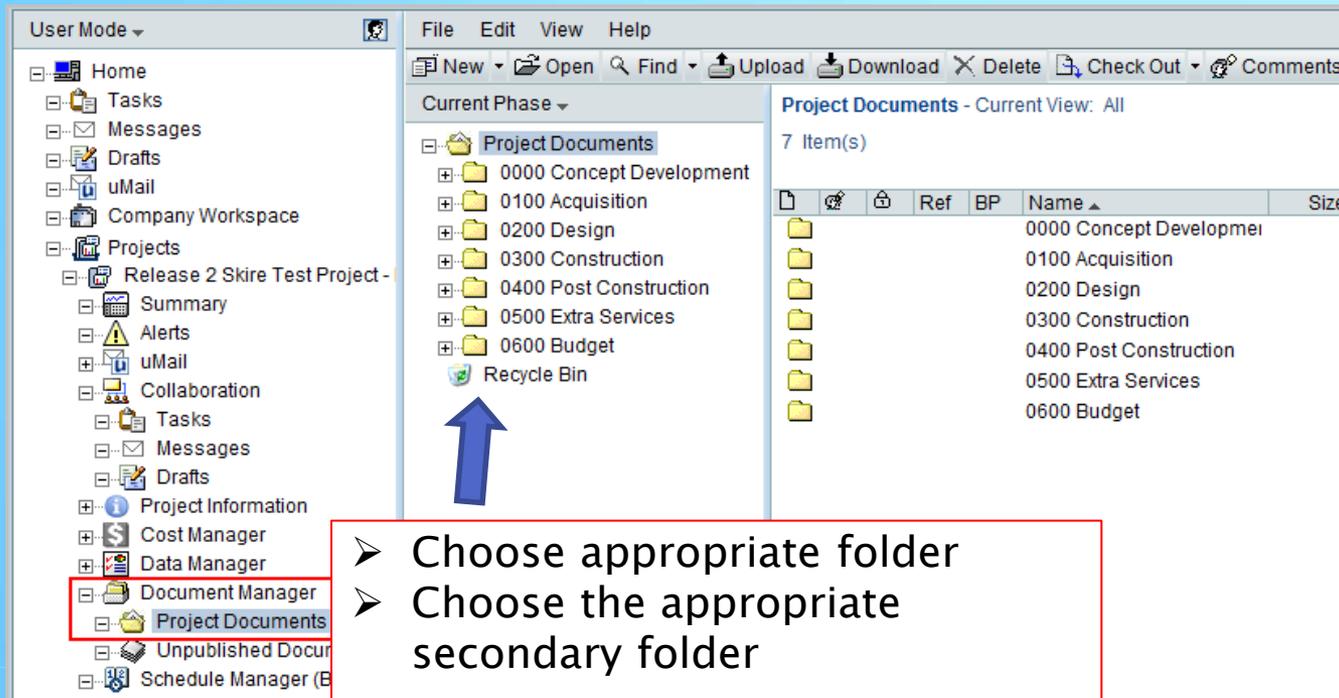
Edit where necessary

Document Saving Instructions

- ▶ Print the LFI MOU document
- ▶ Sign
- ▶ Scan into your computer
- ▶ Upload the document to the Contract's Document Manager.

Upload to Document Manager

- ▶ Navigate to Document Manager > Project Documents.



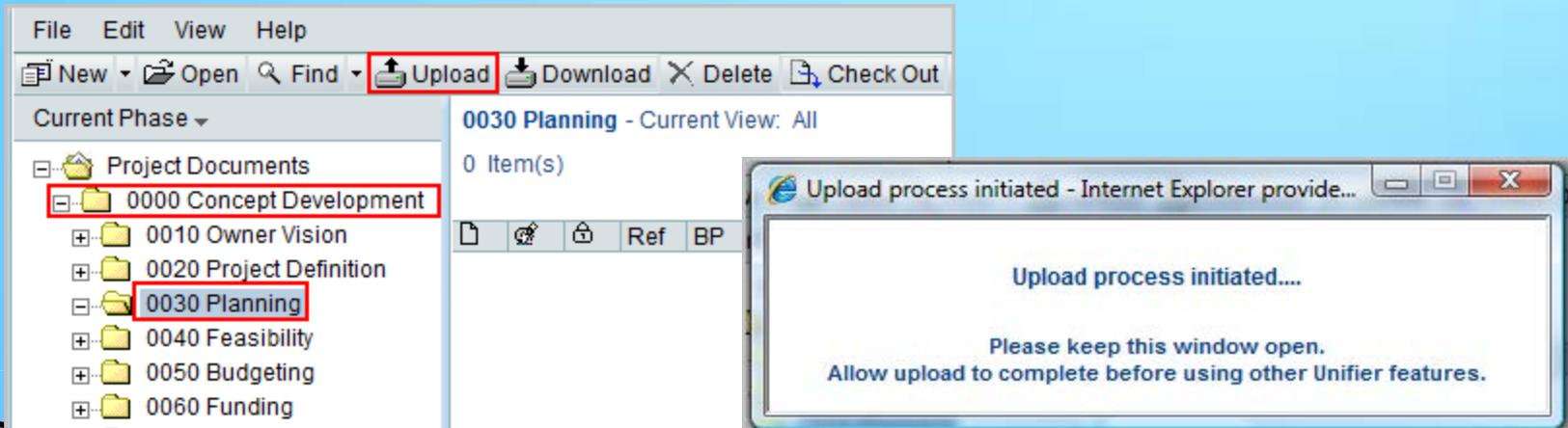
The screenshot shows a software interface with a navigation tree on the left and a main content area on the right. The navigation tree includes 'Home', 'Tasks', 'Messages', 'Drafts', 'uMail', 'Company Workspace', 'Projects', and 'Document Manager'. The 'Document Manager' folder is highlighted with a red box. The main content area shows a 'Project Documents' folder selected, with a list of sub-folders: '0000 Concept Development', '0100 Acquisition', '0200 Design', '0300 Construction', '0400 Post Construction', '0500 Extra Services', '0600 Budget', and 'Recycle Bin'. A blue arrow points to the 'Recycle Bin' folder. A red box highlights the 'Document Manager' folder in the navigation tree and the 'Project Documents' folder in the main content area.

➤ Choose appropriate folder

➤ Choose the appropriate secondary folder

Uploading to Document Manager

- ▶ Select the desired file location to place documents.
- ▶ Click Upload at the top of the taskbar.
 - A window opens up and informs that the upload process has begun



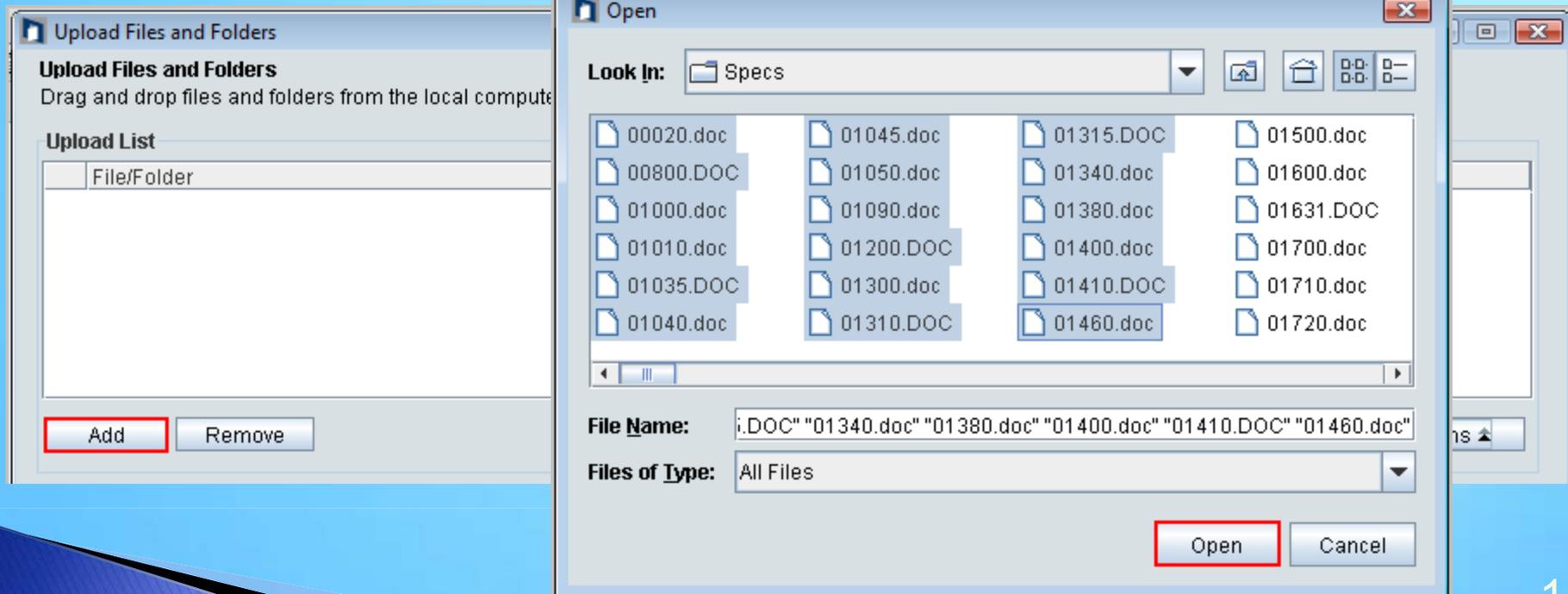
Uploading to Document Manager

- ▶ The Upload Files and Folders window opens.



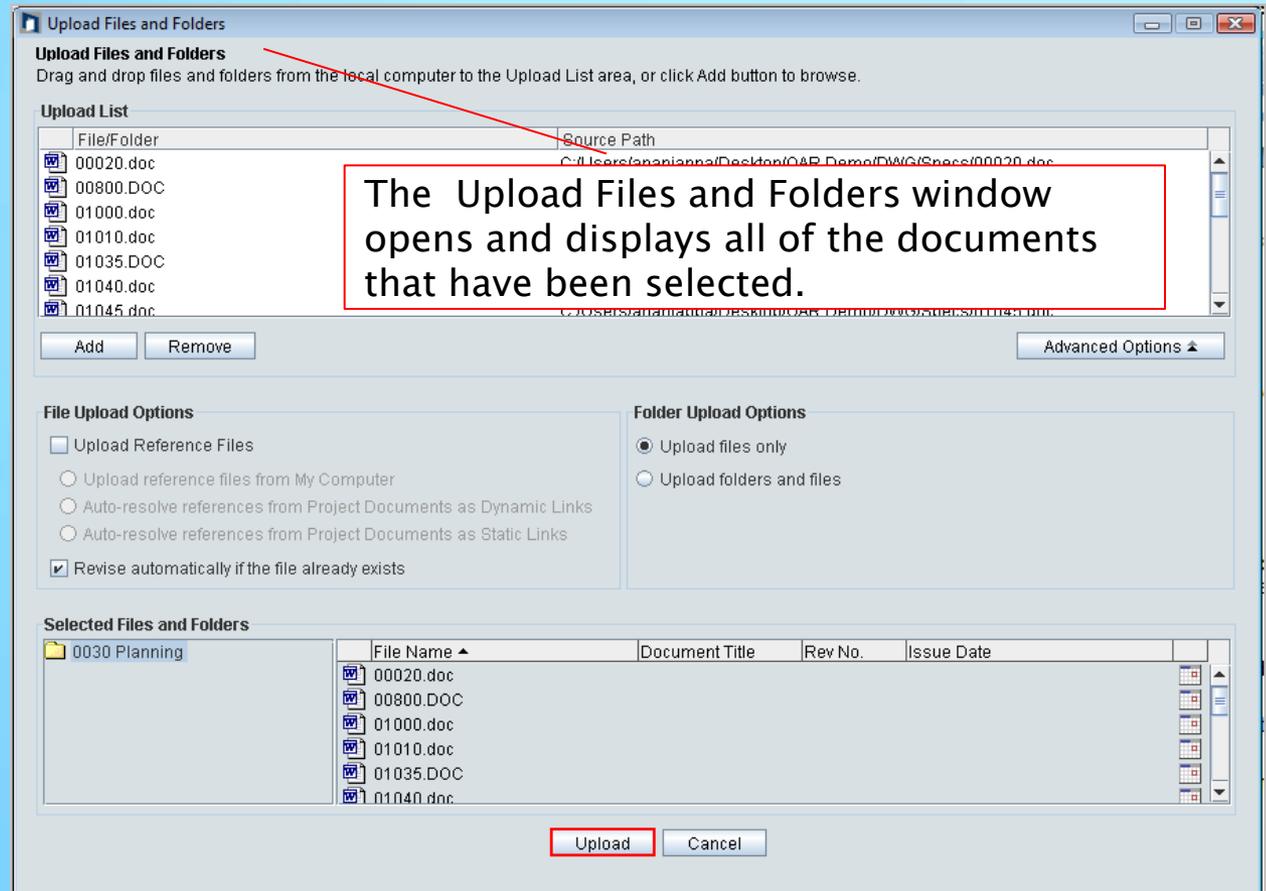
Upload to Document Manager

- ▶ Click Add to select the document(s).
- ▶ Browse for the files on your local system and click Open.



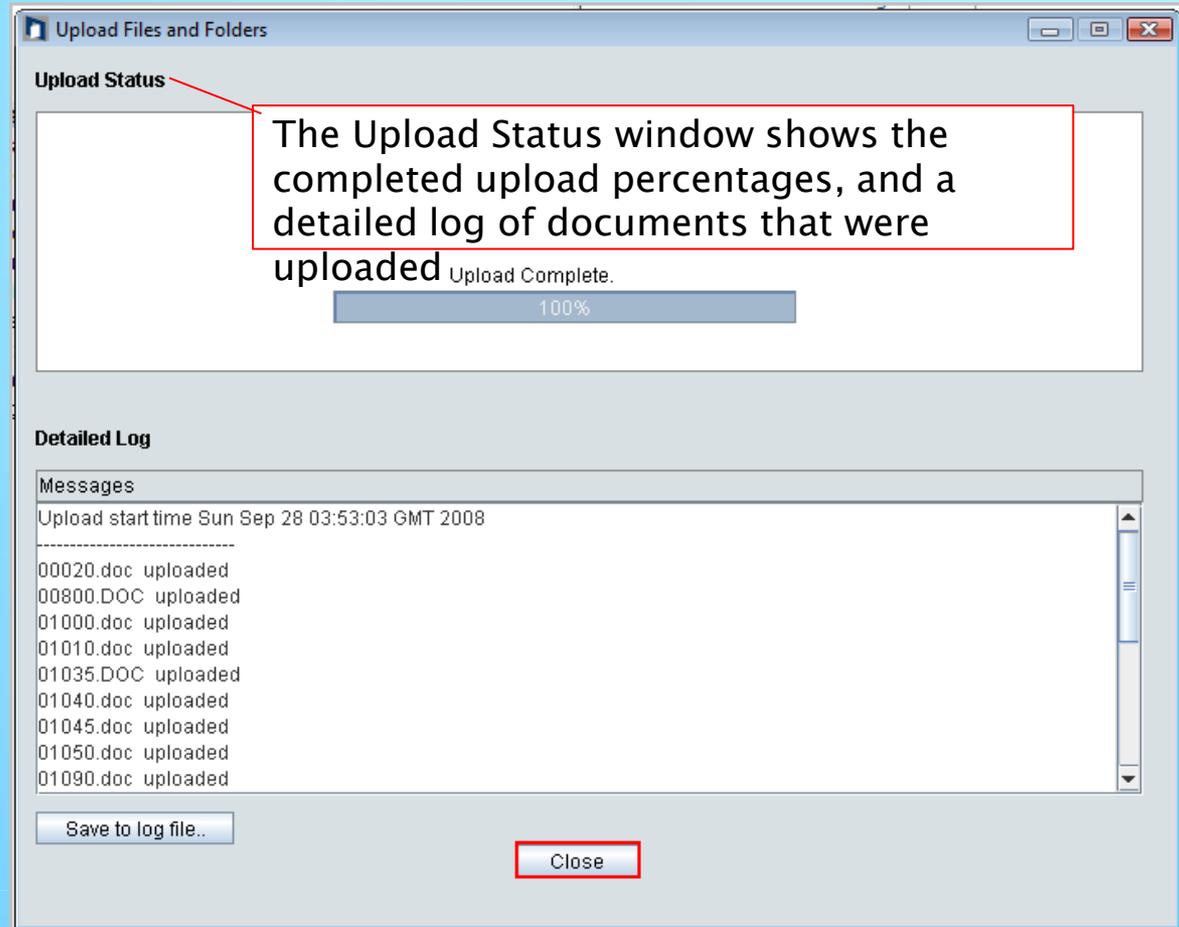
Upload to Document Manager

- ▶ Click Upload.

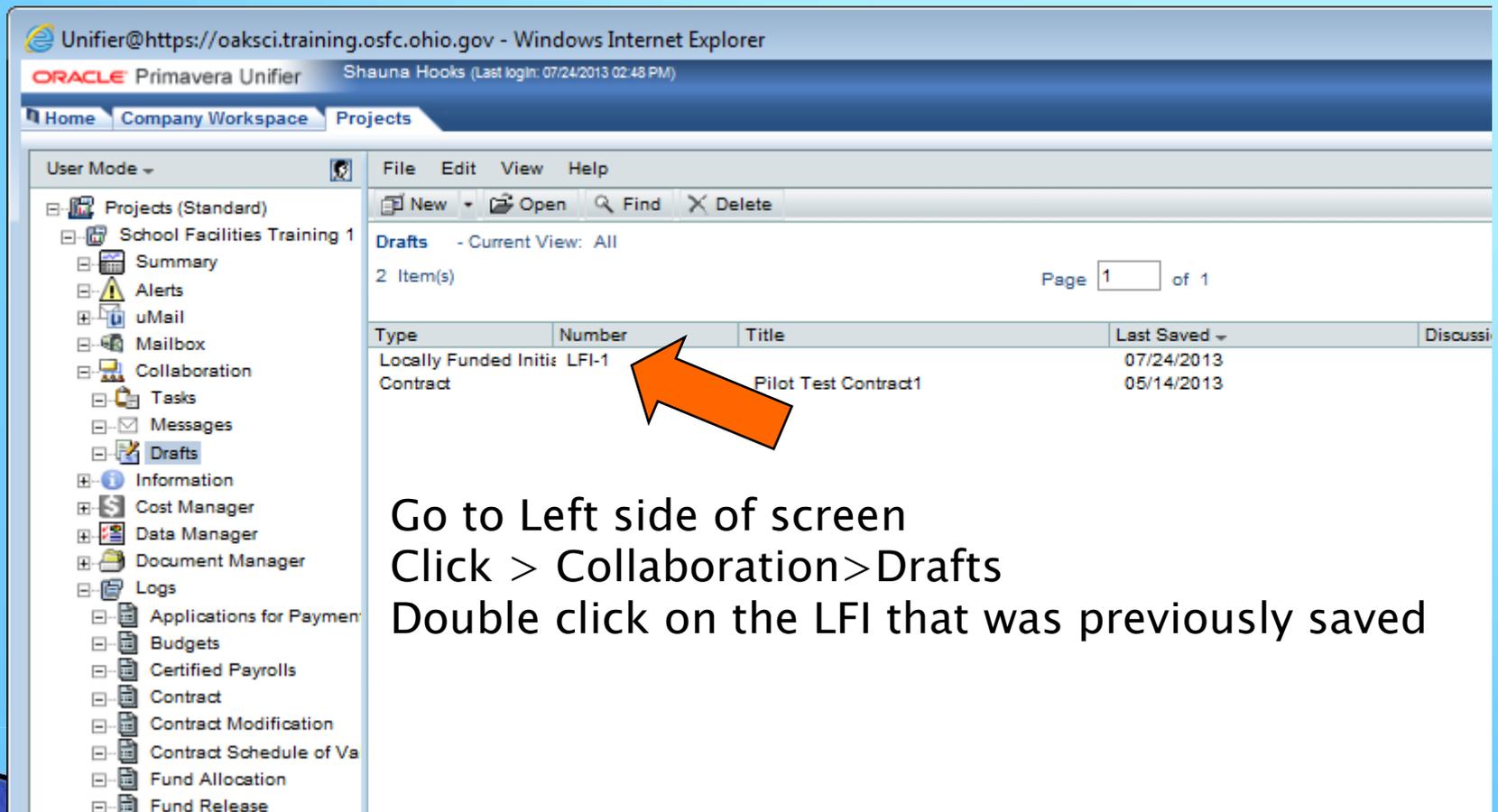


Upload to Document Manager

- ▶ Click Close to return to the project directory and the display of the documents.



Attach to LFI Record



The screenshot shows the Primavera Unifier web interface. The left sidebar contains a tree view with the following items: Projects (Standard), School Facilities Training 1, Summary, Alerts, uMail, Mailbox, Collaboration, Tasks, Messages, Drafts, Information, Cost Manager, Data Manager, Document Manager, Logs, Applications for Payment, Budgets, Certified Payrolls, Contract, Contract Modification, Contract Schedule of Va, Fund Allocation, and Fund Release. The 'Drafts' folder is selected. The main content area shows a table of items:

Type	Number	Title	Last Saved	Discussi
Locally Funded Initia	LFI-1		07/24/2013	
Contract		Pilot Test Contract1	05/14/2013	

An orange arrow points to the 'LFI-1' entry in the 'Number' column.

Go to Left side of screen
Click > Collaboration>Drafts
Double click on the LFI that was previously saved

Attach to LFI Record

- Go to folder and subfolder previously uploaded into
- highlight document
- Click OK

The screenshot displays a web application interface for a Locally Funded Initiative (LFI) record. The main window is titled "Locally Funded Initiative MOU - Project No. OCI-130002 - Windows Internet Explorer". It features a menu bar with "File", "Edit", "View", "Actions", and "Help". A "Workflow Actions" dropdown menu is set to "-Select-".

In the foreground, a "Select Files - Windows Internet Explorer" dialog box is open, showing a file tree under "Current Phase". The tree includes folders such as "Contractor - General", "Contractor - HVAC", "Contractor - Plumbing", "Notices of Commencement", "Plan Approval Documents", "0315 RFI", "0320 Schedule", "0325 Field Reports", "0330 Contractor Payment", "0340 Interpretation & Modification", "0350 Meetings & Reports", "0355 Certified Payrolls", "0360 Notices & Correspondence", "0370 Submittals", "0375 Record Documents", "0380 Claims & Disputes", "0390 Contractor Closeout", "0399 Miscellaneous", "0400 Post Construction", "0500 Extra Services", and "0600 Budget". The "0375 Record Documents" folder is selected, and a blue arrow points to the "LFI1.xml" file in the list. The list shows 1 item(s) on page 1 of 1, with 100 items per page. The file details are: Name: LFI1.xml, Size: 271 KB, Upload Date: 07/23/2013, Owner: Shau. The dialog also has a "Copy Comments" checkbox and "OK" and "Cancel" buttons.

The background window shows a record detail page for "LFI-2". The "Record Number" is "LFI-2", the "Creator" is "UAT Project Manager", the "Creation Date" is "04/18/2013 03:33 PM Local (GMT-5)", the "Status" is "Accepted", and the "Stage" is "SD". There is a text area with the text "dia center and 10 classrooms." and a "Task Notes" section.

At the bottom of the page, there is a "Send For:" section with a "To..." field containing "javascript:fnAttach()", a "Cc..." field, and buttons for "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Attach to LFI Record

- Note the Attachments link updates to (1)

Locally Funded Initiative MOU - Project No. OCI-130002 - Windows Internet Explorer

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

Download the attached document, sign the Funding Plan then scan, upload and attach the signed form to this record.

General

Project Number: OCI-130002 Record Number: LFI-2

Project Name: UAT 5 Rel 1 - Toronto Creator: UAT Project Manager

School District: Toronto City School District Creation Date: 04/18/2013 03:33 PM Local (GMT-5)

Facility Name: High School-Toronto Status: Accepted

County: Jefferson

Title: Intregal Square Foot Stage: SD

OSFC Scope of Work

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

OSFC Scope of Work: District purchased additional square footage in the student dining, gym, media center and 10 classrooms.

Local Initiative Scope of Work:

Action Details

(Click here to view latest content)

To... [input field]

Cc... [input field]

Send For: [input field]

Task Notes:

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

Submit LFI MOU

- Choose the Workflow Action Submit
- Click Send

Locally Funded Initiative MOU - Project No. OCI-130002 - Windows Internet Explorer

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

Download attached document, sign the Funding Plan then scan, upload and attach the signed form to this record.

General

Project Number:	OCI-130002	Record Number:	LFI-2
Project Name:	UAT 5 Rel 1 - Toronto	Creator:	UAT Project Manager
School District:	Toronto City School District	Creation Date:	04/18/2013 03:33 PM Local (GMT-5)
Facility Name:	High School-Toronto	Status:	Accepted
County:	Jefferson	Stage:	SD
Title:	Intregal Square Foot		

OSFC Scope of Work

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

OSFC Scope of Work: District purchased additional square footage in the student dining, gym, media center and 10 classrooms.

Local Initiative Scope of Work:

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:

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

NEED ASSISTANCE

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OR

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