



**Fund a Work Assignment
(Contract Modification or PS Amendment)**
District Treasurer or Owner Financial

Purchase Order

- ▶ Prior to funding the Work Assignment, you must complete the following steps:

Step 1: Create the Purchase Order in your own financial system of record.

Step 2: Record the PO in OAKS CI by following the “Record Purchase Order” job aid located here:

<http://ofcc.ohio.gov/OAKSCI/K-12Training.aspx#1328103-k-12-district-staff>

Then proceed to the “Email Task Notification” slide.

Email Task Notification

- ▶ You will receive an email notification that you have a **Contract Modification** or **PS Amendment** task awaiting “**PO Creation**”
- ▶ Click the “Unifier Login” button to access your task

Mon 8/28/2017 10:31 AM

Unifier - Katie Tuttle,soo <unifier_notifications@oracle.com>
Contract Modification K12 CM-0003 is sent to you for PO Creation.

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-LSD-CAR-ENP-2012**

Contract Modification K12 CM-0003 is sent to you for PO Creation.

From : Katie Tuttle
Sent For : PO Creation

Source Name : Brown-LSD-CAR-ENP-2012
Record No : Contract Modification K12 CM-0003
Title : Facilitation Work

Unifier Login

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

Task Action

- ▶ Click Accept Task to begin work on your Task

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161955&parent_id=0&viewOnly=0&project_id=1095&_uref=uuu5:navigator-4

File Edit View Actions Help

Accept Task Decline Task SOV Review Close Window

Contract Modification K12

General

Project Number: SFC-130329 Record Number: CM-0004
Project Name: Brown-LSD-CAR-ENP-2012 Creator: [Katie Tuttle](#)
Organization Name: Brown LSD Creation Date: 08/28/2017 08:00 AM (UTC-8)
Status: Accepted
Title: Facilitation Work

Task Details

From: [Katie Tuttle](#) Task Due Date: Task Notes (0)
To: [District Treasurer: Floyd Clapgood](#) Task Status: Not Started Workflow Progress
Cc: More..
Sent For: PO Creation

Line Item List

Current View: All Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Sup
001	0	OR-OT-PF	OR Partnering Facilitation	Document Review	\$2,000.00	0	

Grid Find Show Filtered Total Amount Total Amount: \$2,000.00

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

Add the PO

- ▶ Click the General Tab to expand
- ▶ Scroll down to the Purchase Order Details section

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161937&model=ucmk&project_id=1095&initiateBP=&bulkautoaccept=&fromRe...

File Edit View Actions Help

Workflow Actions PO Issued Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

General Contract Modification K12

Contract Amount After Amendment(\$):

Change Order Cost and Time Impact

Total Amount (\$):
Line Item Total (\$):
Difference (\$):

Purchase Order Details

PO 1 Number: *
PO 2 Number:
PO 3 Number:

PO 1 Amount (\$):
PO 2 Amount (\$):
PO 3 Amount (\$):
Total Amount (\$):

Document Publishing

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

Publish Path:

Action Details

Line Item List

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

Add the PO

- ▶ Click the Select button to choose the appropriate Purchase Order

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161937&model=ucmk&project_id=1095&initiateBP=&bulkautoaccept=&fromRe...

File Edit View Actions Help

Workflow Actions PO Issued Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

General Contract Modification K12

Contract Amount After Amendment(\$):

Change Order Cost and Time Impact

Total Amount (\$):
Line Item Total (\$):
Difference (\$):

Purchase Order Details

PO 1 Number: *
PO 2 Number:
PO 3 Number:

Document Publishing

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

Publish Path:

Action Details

Line Item List

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

Purchase Orders K12 - Google Chrome

<https://ohio-stage-unifier.oracleindustry.com/bp/studio/bp/picker?model=...>

File View Help

Open Clear Find Close

Purchase Orders K12 - Current View: All Project Records

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

Title	PO Number	Total Amount (\$)	Contract Name
PO #1	987654	0.00	

Add the PO

- ▶ Purchase Order will populate in purchase order details

Contract Modification K12 - Facilitation Work - Project No. SFC-130329 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161937&model=ucmk&project_id=1095&initiateBP=&bulkautoaccept=&fromRe...

File Edit View Actions Help

Workflow Actions PO Issued Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

Contract Modification K12

General

Contract Amount After Amendment(\$):

Change Order Cost and Time Impact

Total Amount (\$):	<input type="text" value="\$0.00"/>
Line Item Total (\$):	<input type="text" value="\$0.00"/>
Difference (\$):	<input type="text" value="\$0.00"/>

Purchase Order Details

PO 1 Number: <input type="text" value="100"/>	<input type="button" value="Select..."/>	<input type="text" value="\$14,115.31"/>
PO 2 Number: <input type="text"/>	<input type="button" value="Select..."/>	<input type="text" value="\$0.00"/>
PO 3 Number: <input type="text"/>	<input type="button" value="Select..."/>	<input type="text" value="\$0.00"/>
		Total Amount (\$): <input type="text" value="\$0.00"/>

Document Publishing

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

Publish Path:

Action Details

Line Item List

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

End the Record

- ▶ Once the PO is added, you will end the record
- ▶ Verify Workflow Action
- ▶ Click Send

Contract Modification K12 - Facilitation Work - Project No. SFC-130029 - Google Chrome

Secure | https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=161937&model=ucmk&project_id=1095&initiateBP=&bulkautoaccept=&fromRe...

File Edit View Actions Help

Workflow Actions PO Issued Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

Contract Modification K12

General

Action Details

PO Issued (Click here to view latest content)

To...

Cc...

Send For: End

Task Notes:

Workflow Progress

Line Item List

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

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211