OAKS
Capital Improvements

Record Purchase Order

K12

Record Purchase Order

Recording the Purchase Order

Create the Purchase Order in your own financial system of record. Follow the instructions in these slides to record the Purchase Order in OAKS CI.

When do I create my PO in OAKS CI?

For Miscellaneous Commits:

When the Miscellaneous Commit reaches the “Funding Certification” step and you receive a task, you will create your Purchase Order in your financial system then record it in OAKS CI

For Contracts and Change Orders:

When the contract or change order reaches the DocuSign step in OAKS CI, you will receive a notification that you have been copied on the record.

When you receive that notification, you will create your Purchase Order in your own financial system, then log into OAKS CI and record the Purchase Order

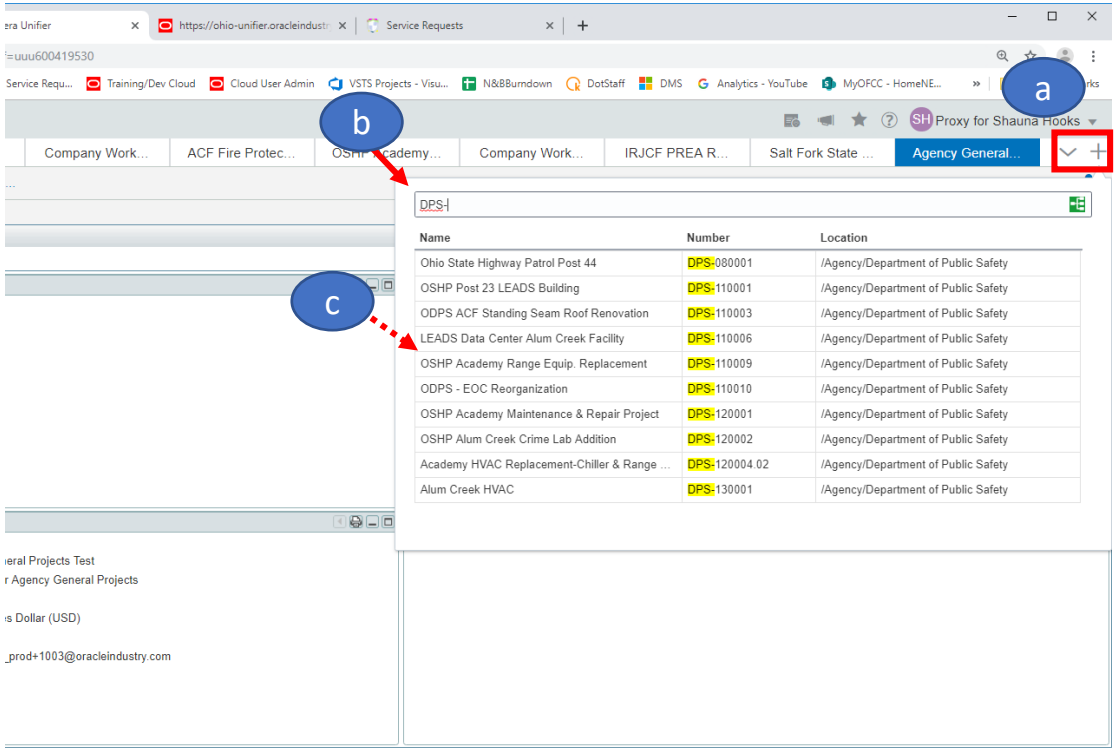
Recording the Purchase Order (Owner Financial)

- Log into OAKS CI

  a. Click + sign

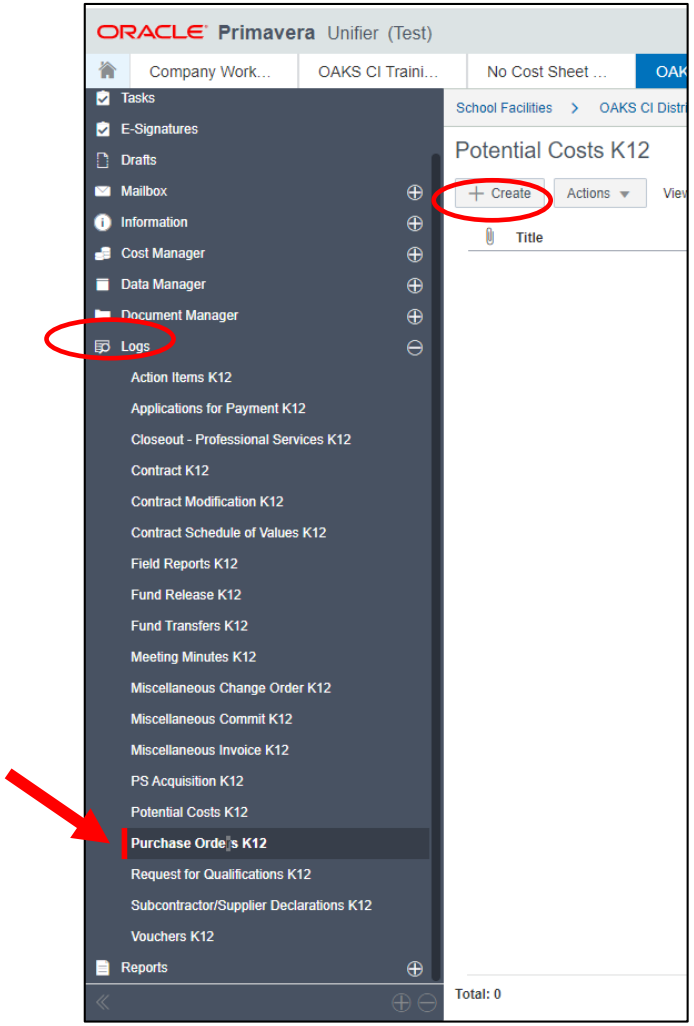
  b. Type project name or number in search bar

  c. Click appropriate project to open



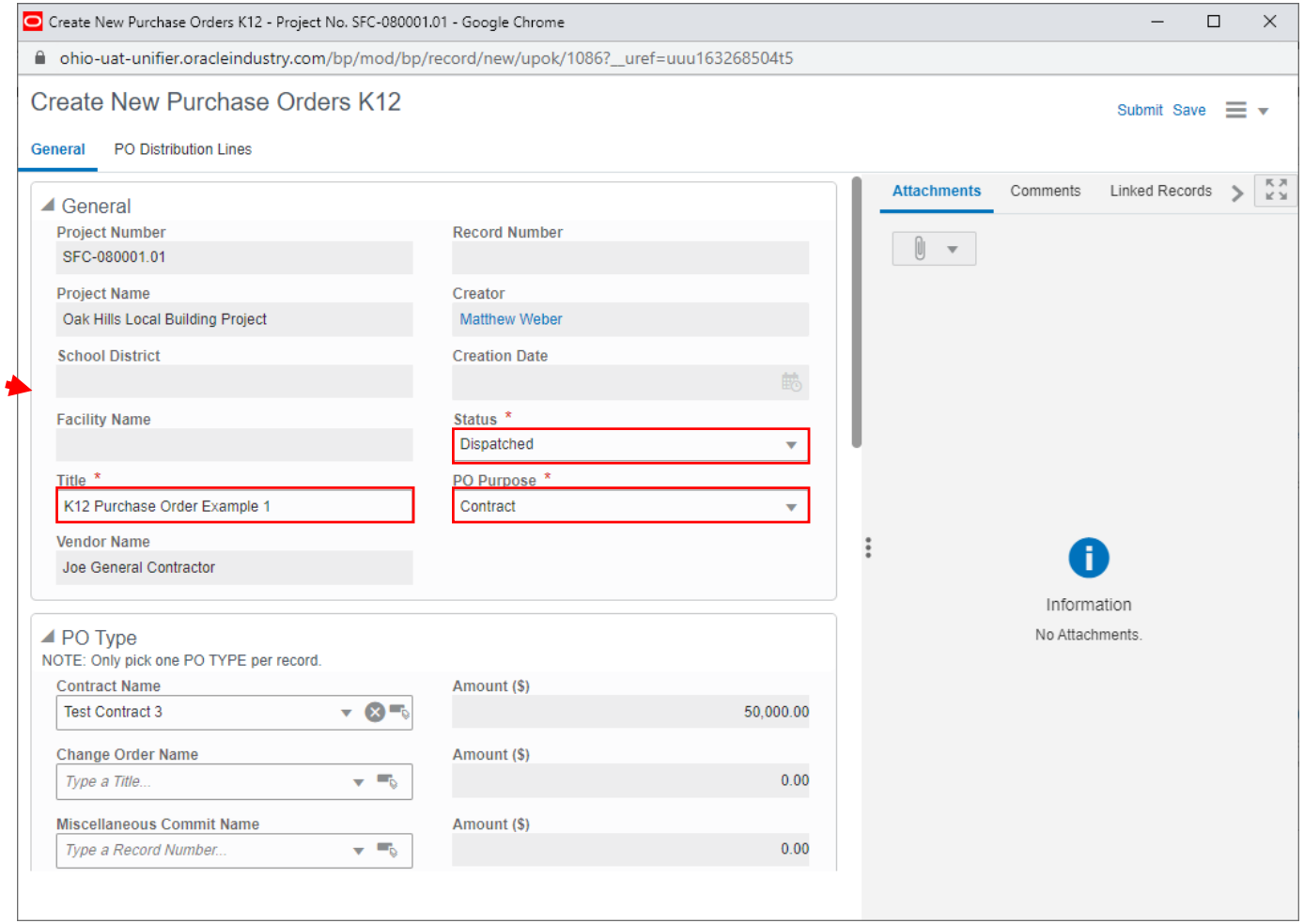
Record a Purchase Order

- To record your Purchase Order in OAKS CI navigate to:
  - Logs -> Purchase Orders K12
  - Click Create



Record a Purchase Order

- Enter the Title and select the Vendor for the Purchase Order
- Status: “Dispatched”
- Select: PO Purpose
  - (Agreement, Amendment, Contract, Change Order or Msc. Commit)

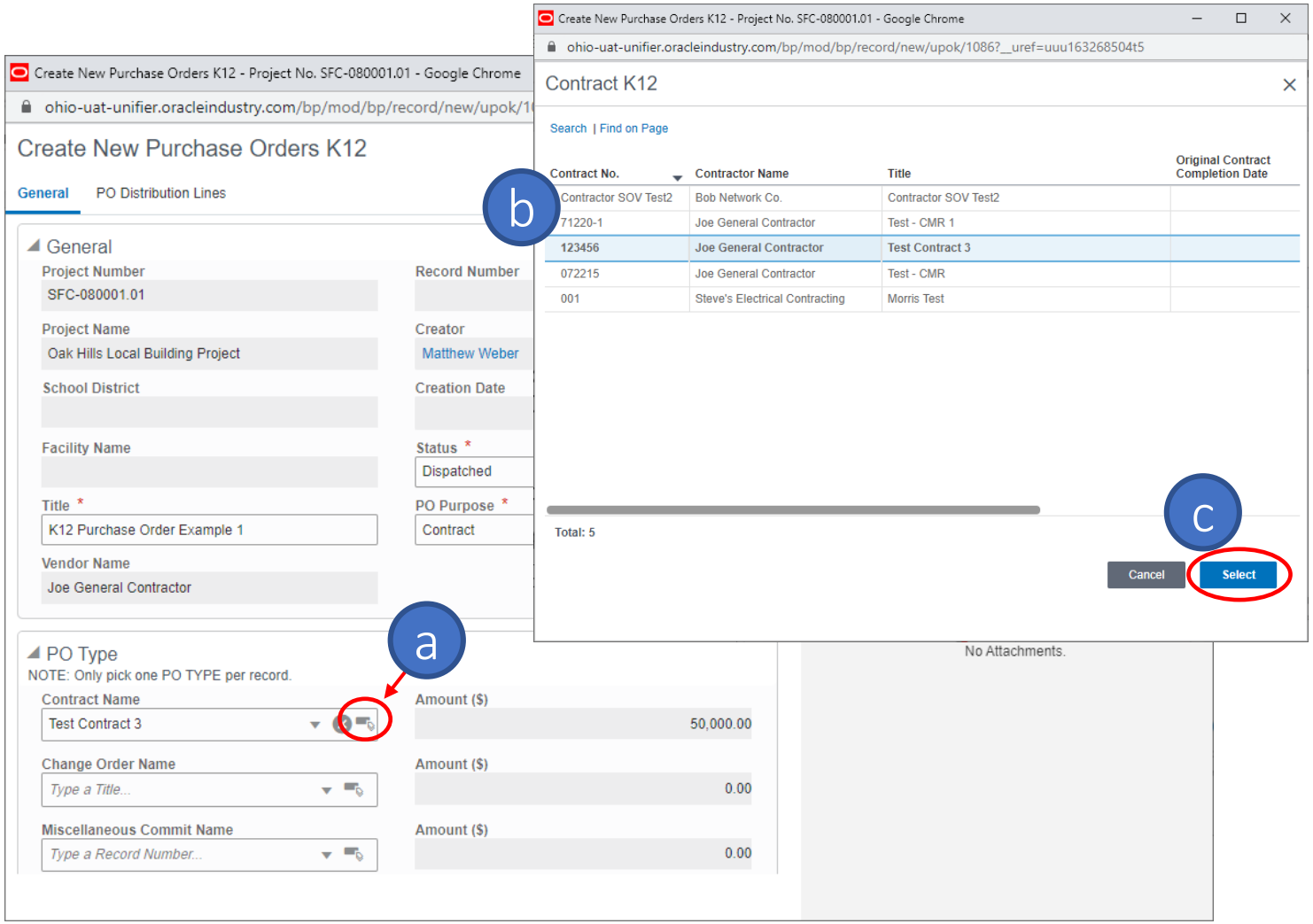


Record a Purchase Order

a) Click the selection button next to Contract Name

b) Choose Contract

c) Click Select



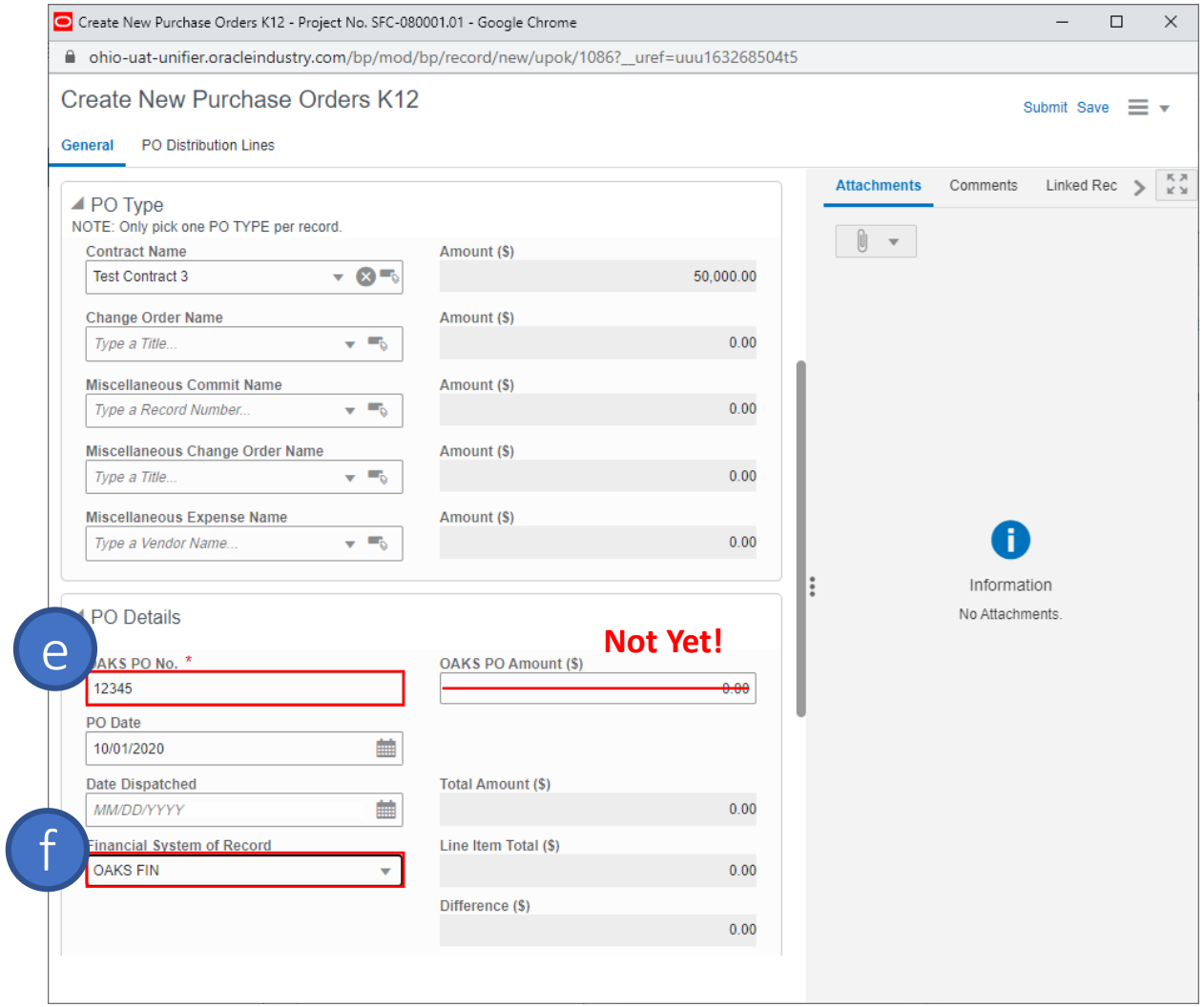
Record a Purchase Order

- In the PO Details section:

e) Enter the Purchase Order number into the Record

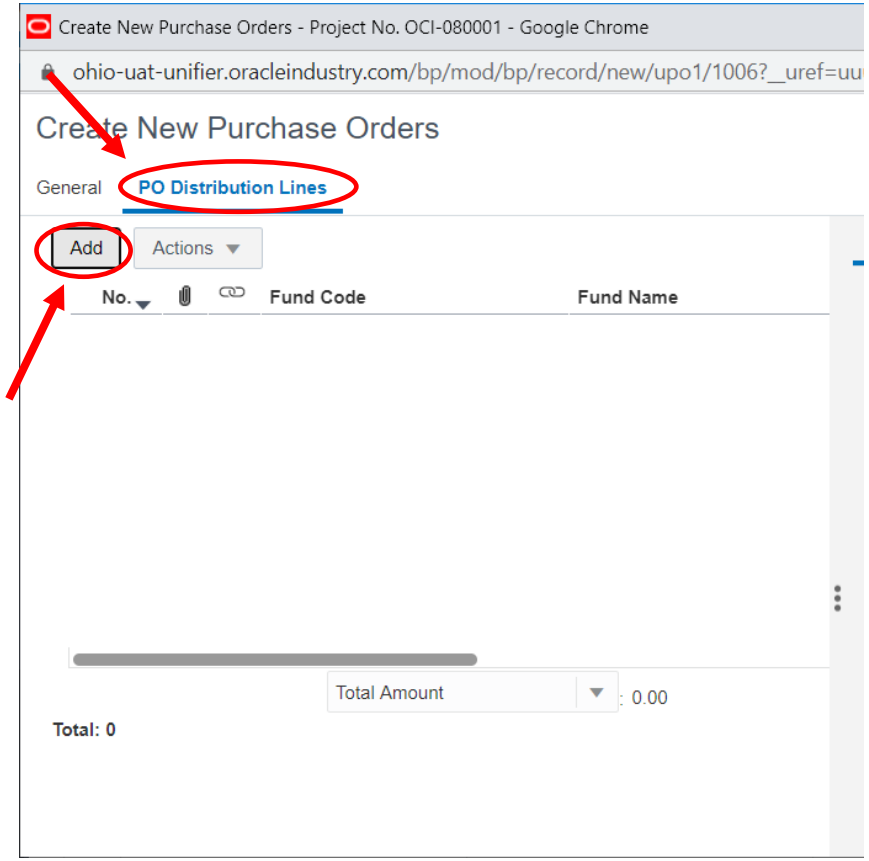
f) Choose the Financial System of Record

- **Do NOT plug in the PO amount until adding Distribution Lines (see next slides)**



Fund the PO

- Click the PO Distribution Lines Tab
- Click **Add**



Fund the PO

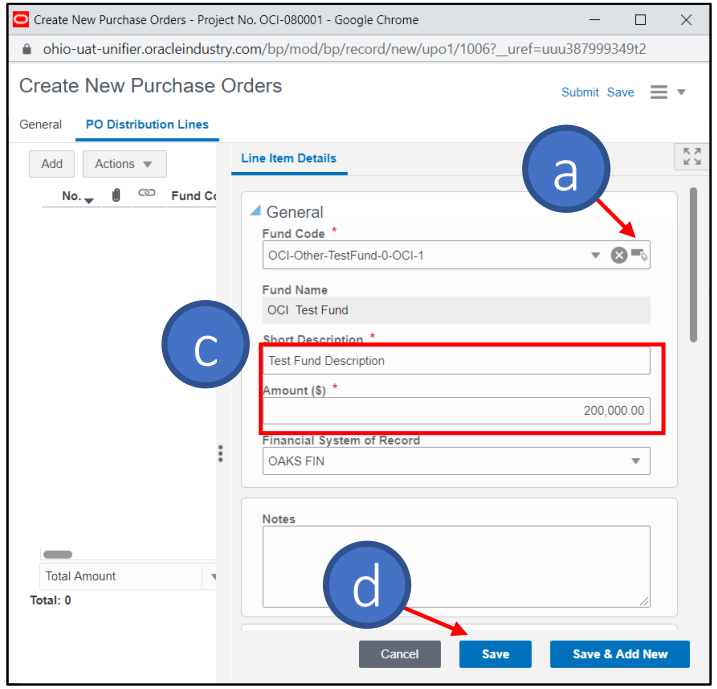
a) Click Select

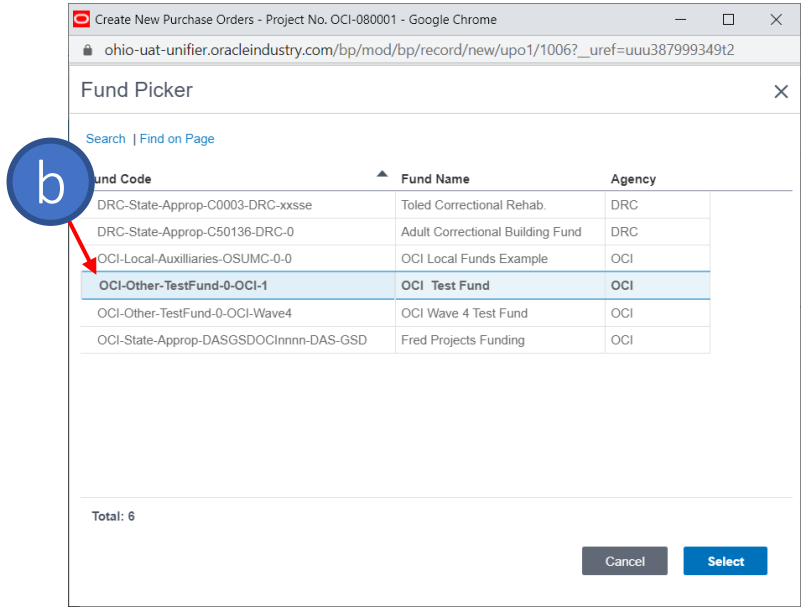
b) Choose the appropriate fund code

- Note: If you do not see any funds to choose from, call OAKS CI

c) Enter a Short Description and Dollar Amount

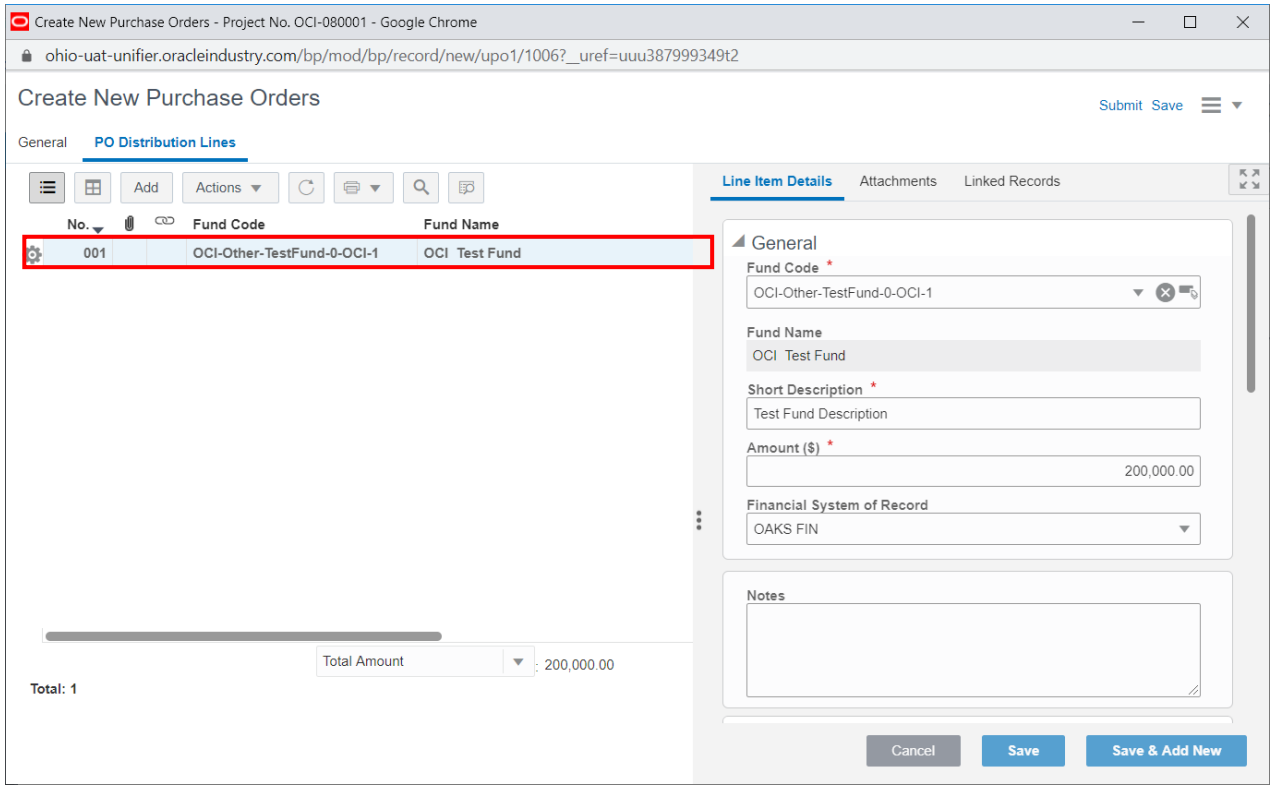
d) When finished entering information, click **Save**





Fund the PO

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



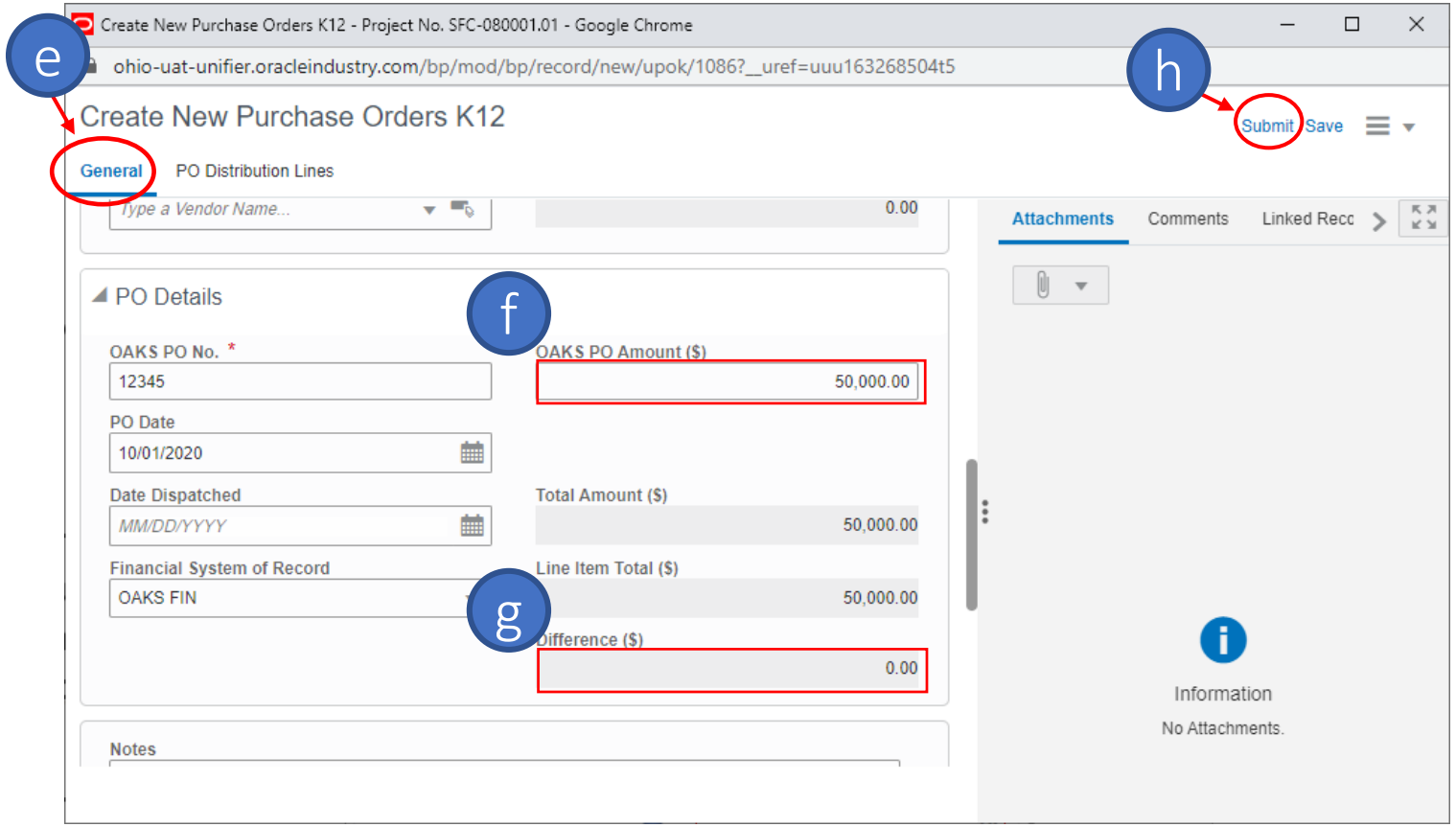
Finish the PO

e) Go back to the upper form by clicking the General tab

f) Type in the dollar amount of your PO that you entered for the Line Item

g) The difference should be $0

h) Click **Submit**



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211