Basic Project Process

Step 1

District/Building project created by OAKS CI based on notification from OFCC Project Manager

Step 2

- OAKS CI Team members meet with the PM and District staff (via phone) to discuss OAKS CI roles

- Funding information is submitted by the District Treasurer to OAKS CI

- Fund Release is recorded by OAKS CI

Step 3

- Vendor Forms are submitted to OAKS CI by OFCC PM or PC

- Vendors are created in the system by OAKS CI Team

Step 4

- OAKS CI User Application for Access is submitted to OAKS CI by the OFCC PM or PC

Step 5

- Contract is initiated by the Project Coordinator for GC, CMR, or DB

- Initiation by the OA, AE, CX for professional service contracts

Continued on Next Slide

Basic Project Process

Step 6

Upon receipt of Contract and/or Contract Modification in OAKS CI the **School District**:

- Inputs the Board resolution information into the Contract Record

- Signs the contract

- Creates the purchase order in their own Financial System of Record

- Records the PO in OAKS CI

Step 7

- Subcontractor/Supplier Declarations are created by the CMR/Contractor and Professional Service Providers

Step 8

- Contract SOV created on the OAKS CI spreadsheet by Vendor

- **Project Coordinator** inputs the Spreadsheet into OAKS CI and checks to see that EDGE can be verified and that LFI is identified on the spreadsheet

Step 9

- Application for Payment can be created by Vendors

- **Project Manager** will review and Approve

Step 10

Upon receipt of Application for Payment in OAKS CI the **School District**:

- Creates a Voucher (check) in their own financial system of record

- Records the Voucher in OAKS CI

- Pulls the Voucher into the Application for Payment record