



Record and Apply Purchase Order



Record Purchase Order



Purchase Order Purpose

- ▶ Purchase Orders

- ▶ **Used to Support the following types of records in OAKS CI:**

- ▶ Contract
 - ▶ Professional Services Agreement
 - ▶ Change Order
 - ▶ Professional Services Amendment
 - ▶ Miscellaneous Commit: Acts as a contract in OAKS CI for vendors who will not hold a contract in OAKS CI



When do I record my PO in OAKS CI?

- ▶ There are two possible ways that you will be notified to create a Purchase Order:
 - ▶ Upon receipt of a Contract or Change Order in DocuSign
 - ▶ Or Upon notification via email from in OAKS CI that you have a PS Agreement or Amendment awaiting Funding, you will then:
 1. Create your Purchase Order in your own financial system of record
 2. Record your Purchase Order information in OAKS CI
 3. Apply the Purchase Order to the Contract, Agreement, Amendment, Change Order or Msc. Commit



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.



Recording the Purchase Order

- Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar contains the ID "uuu600419530". The page header includes several tabs: "Company Work...", "ACF Fire Protec...", "OSHP Academy...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the page header, labeled with a blue circle "a". Below the header, a search bar contains the text "DPS:". A red arrow labeled with a blue circle "b" points to the search bar. Below the search bar, a table displays search results for projects. A red arrow labeled with a blue circle "c" points to the first row of the table. The table has three columns: "Name", "Number", and "Location".

Name	Number	Location
Ohio State Highway Patrol Post 44	DPS:080001	/Agency/Department of Public Safety
OSHP Post 23 LEADS Building	DPS:110001	/Agency/Department of Public Safety
ODPS ACF Standing Seam Roof Renovation	DPS:110003	/Agency/Department of Public Safety
LEADS Data Center Alum Creek Facility	DPS:110006	/Agency/Department of Public Safety
OSHP Academy Range Equip. Replacement	DPS:110009	/Agency/Department of Public Safety
ODPS - EOC Reorganization	DPS:110010	/Agency/Department of Public Safety
OSHP Academy Maintenance & Repair Project	DPS:120001	/Agency/Department of Public Safety
OSHP Alum Creek Crime Lab Addition	DPS:120002	/Agency/Department of Public Safety
Academy HVAC Replacement-Chiller & Range ...	DPS:120004.02	/Agency/Department of Public Safety
Alum Creek HVAC	DPS:130001	/Agency/Department of Public Safety



Record a Purchase Order

▶ To record your Purchase Order in OAKS CI navigate to:

- ▶ Logs -> Purchase Orders
- ▶ Click Create or New

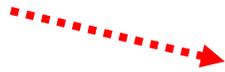
The screenshot displays the Oracle Primavera Unifier (Development) interface. The left-hand navigation menu is open, showing a list of modules. The 'Logs' module is circled in red, and a red arrow points to the 'Purchase Orders' module. The main content area shows the 'Purchase Orders' page with a '+ Create' button also circled in red. Below the button is a table of purchase orders.

Title	Contract
Professional Services TEJ	test edit f
CMR Purchase Order	test edit f
title	Wednesd
Pallets	
Highway 06 Revisited	Katie's Co
CADC Boiler Project #1	jim
DMR123	Training
Franklin Project1	Test Agre
17504	Test Agre
PO 1	test edit f
PO #1	123Test A
3617	Test Agre
PO #1	Training
Po #1	marie cas
PO-001	RW Sette
Greenleaf	Test Agre
CSU	Test Agre
purchase order 1	Test Agre
PO 0018723792	Test Agre
Purchase Order 1	Test Agre
Monday testing	Test Agre
PO for Test #1	Test Agre
sample	



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)
- ▶ Select: Financial System of Record



Create New Purchase Orders - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1006?_uref=uuu387999349t2

Create New Purchase Orders

Submit Save

General PO Distribution Lines

General

Organization: Department of Administrative Services

Project Number: OCI-080001

Project Name: OAKS CI Training 1

Record Number

Creator: Matthew Weber

Creation Date

Project Location: Surface Road

Title *: PO #123

Vendor *: Sands Decker Ltd.

Status *: Dispatched

PO Purpose *: Contract

Financial System of Record *: OAKS FIN

Change Status: Select

Attachments: No Attachments.



Record a Purchase Order

- Under PO Type select the appropriate record type **(only pick one)** then click select to choose your record

Create New Purchase Orders - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1006?_uref=uuu387999349t2

Create New Purchase Orders

Submit Save

General PO Distribution Lines

PO Type

NOTE: Only pick one PO TYPE per record.

Professional Services Agreement Name	Amount (\$)	0.00
Professional Services Amendment Name	Amount (\$)	0.00
Contract Name *	Amount (\$)	200,000.00
Change Order Name	Amount (\$)	0.00
Miscellaneous Commit Name	Amount (\$)	0.00
Miscellaneous Expense Name	Amount (\$)	0.00

Type a Title...

Attachments

Contract

Search | Find on Page

Contract No.	Contractor Name	Title	Original Contract Completion	Status	Total Contract Amount
22-22222	Sands Decker Ltd.	Franklin Peet	03/20/2009 12:00 ...	Final_Approved	89.00
001	Random Roofing and Repair	TJ test for RN	08/24/2014 10:00 ...	Final_Approved	5,000.00
12333	Sands Decker Ltd.	hooks2		Accepted	42,000.00
TEST NUMBER	OAKS Plumbing	TEST		Pending	45,000.00
3445	Sands Decker Ltd.	hookstest		Accepted	45,000.00
DOT-050114-01	Sands Decker Ltd.	Bruce's Contract		Pending	143,123.00
DAS-0005	Random Roofing and Repair	Computer Class -0001	03/04/2013 08:00 ...	Final_Approved	150,000.00
DAS-01	Sands Decker Ltd.	Contract Test 1		Accepted	200,000.00
Contractor Test A	Sands Decker Ltd.	DAS 01	07/03/2015 05:00 ...	Final_Approved	200,000.00

Total: 23

Cancel Select



Record a Purchase Order

- ▶ In the PO Details section - Ensure you plug in the Purchase Order number into the Record.
- ▶ Do **NOT** plug in the PO amount until adding Distribution Lines (see next slides)

Create New Purchase Orders - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1006?_uref=uuu387999349t2

Create New Purchase Orders

Submit Save

General PO Distribution Lines

PO Details

The OAKS PO No. should be a 10 digit number ex. 0000007825

Not Yet!

OAKS PO No. 98765432100

OAKS PO Amount (\$) 0.00

OAKS PO Date MM/DD/YYYY HH:MM AM

Date Dispatched MM/DD/YYYY HH:MM AM

Created by Integration Select

Local PO No.

Local PO Amount (\$) 0.00

Local PO Date MM/DD/YYYY HH:MM AM

Attachments

Information
No Attachments.



Fund the PO

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

Create New Purchase Orders - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1006?_uref=uu

Create New Purchase Orders

General **PO Distribution Lines**

Add Actions

No.	Fund Code	Fund Name
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Total Amount : 0.00

Total: 0



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**

The screenshot shows the 'Create New Purchase Orders' form in a web browser. The 'PO Distribution Lines' tab is active. A 'Line Item Details' panel is open, showing the 'General' section. The 'Fund Code' dropdown is set to 'OCI-Other-TestFund-0-OCI-1'. The 'Fund Name' is 'OCI Test Fund'. The 'Short Description' field contains 'Test Fund Description'. The 'Amount (\$)' field is set to '200,000.00'. The 'Financial System of Record' is 'OAKS FIN'. The 'Notes' field is empty. The 'Save' button is highlighted with a blue circle 'd' and an arrow pointing to it. A blue circle 'a' is also present near the top right of the form.

The screenshot shows the 'Fund Picker' dialog box. It contains a table with columns for 'Fund Code', 'Fund Name', and 'Agency'. The row 'OCI-Other-TestFund-0-OCI-1' is selected and highlighted in blue. A blue circle 'b' is positioned above the table with an arrow pointing to the selected row. The 'Total: 6' is displayed at the bottom left of the dialog. 'Cancel' and 'Select' buttons are at the bottom right.

Fund Code	Fund Name	Agency
DRC-State-Approp-C0003-DRC-xxsse	Toled Correctional Rehab.	DRC
DRC-State-Approp-C50136-DRC-0	Adult Correctional Building Fund	DRC
OCI-Local-Auxiliaries-OSUMC-0-0	OCI Local Funds Example	OCI
OCI-Other-TestFund-0-OCI-1	OCI Test Fund	OCI
OCI-Other-TestFund-0-OCI-Wave4	OCI Wave 4 Test Fund	OCI
OCI-State-Approp-DASGSDOCInmn-DAS-GSD	Fred Projects Funding	OCI



Fund the PO

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

The screenshot shows the 'Create New Purchase Orders' interface in a web browser. The browser title is 'Create New Purchase Orders - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1006?_uref=uuu387999349t2'. The page title is 'Create New Purchase Orders'. There are 'Submit' and 'Save' buttons in the top right corner. The main content area is divided into two tabs: 'General' and 'PO Distribution Lines'. The 'PO Distribution Lines' tab is active and shows a table with the following data:

No.	Fund Code	Fund Name
001	OCI-Other-TestFund-0-OCI-1	OCI Test Fund

The first row of the table is highlighted with a red border. Below the table, there is a 'Total Amount' field showing '200,000.00'. To the right of the table is a 'Line Item Details' panel with the following fields:

- General**
- Fund Code ***: OCI-Other-TestFund-0-OCI-1
- Fund Name**: OCI Test Fund
- Short Description ***: Test Fund Description
- Amount (\$) ***: 200,000.00
- Financial System of Record**: OAKS FIN
- Notes**: (empty text area)

At the bottom of the panel are 'Cancel', 'Save', and 'Save & Add New' buttons.



Finish the PO

- a) Go back to the upper form by clicking the General tab
- b) Type in the dollar amount of your PO that you entered into the Line Item
- c) The difference should be \$0
- d) Click **Submit**

The screenshot shows the 'Create New Purchase Orders' web form. The browser title is 'Create New Purchase Orders - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/upo1/1006?_uref=uuu387999349t2'. The form has two tabs: 'General' and 'PO Distribution Lines'. The 'General' tab is active. The form contains several input fields and summary rows. Annotations are as follows:

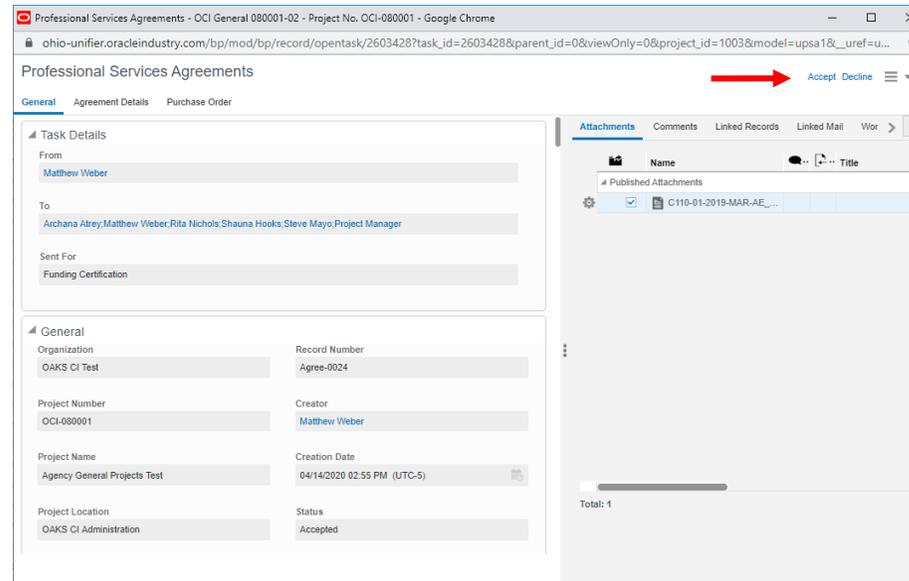
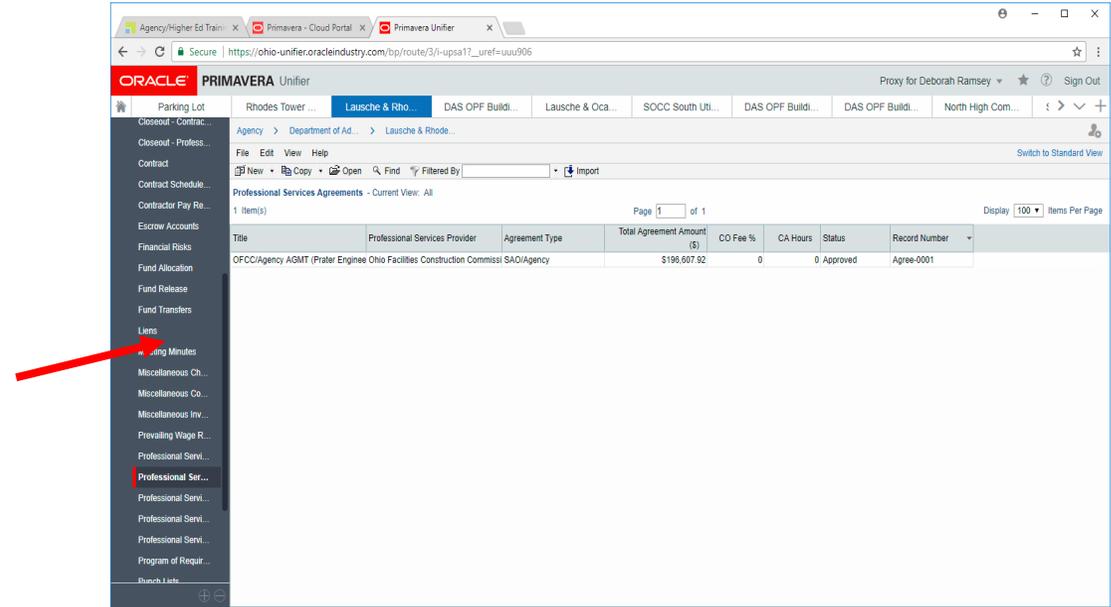
- a**: Points to the 'General' tab.
- b**: Points to the 'OAKS PO Amount (\$)' field, which contains '200,000.00'.
- c**: Points to the 'Difference (\$)' field, which contains '0.00'.
- d**: Points to the 'Submit' button in the top right corner.

Field	Value
OAKS PO No.	98765432100
OAKS PO Date	MM/DD/YYYY HH:MM AM
Date Dispatched	MM/DD/YYYY HH:MM AM
Created by Integration	Select
Local PO No.	
Local PO Date	MM/DD/YYYY HH:MM AM
Date Dispatched	MM/DD/YYYY HH:MM AM
OAKS PO Amount (\$)	200,000.00
Local PO Amount (\$)	0.00
Total Amount (\$)	200,000.00
Line Item Total (\$)	200,000.00
Difference (\$)	0.00



Apply PO to Record

- ▶ Go to Logs and find the appropriate record (for this example we are using the PS Agreement)
- ▶ Double click on the Record
- ▶ Click Accept Task, if the task has not already been Accepted



Apply PO to Record

- ▶ In the **General** tab, scroll down to the Purchase Order Details section:

- Click the Select button next to **PO Record**
- Choose the PO Record
- Click **Select**

The screenshot displays the Oracle Professional Services Agreements interface. The main window shows the 'Purchase Order Details - 1' section with a 'PO Record' field. A red circle 'a' highlights the 'Select' button next to the 'PO Record' field. Below this, there are input fields for OAKS PO No., OAKS PO Date, Local PO No., and Local PO Date, each with a corresponding amount field set to 0.00. A 'Total Amount (\$)' field is also present, set to 0.00. To the right, there is a 'Name' section with 'Unpublished Attachments' including 'C-1.pdf' and 'C-2.pdf'. A second screenshot, overlaid on the right, shows a 'Purchase Orders' list. A red circle 'b' highlights the 'Purchase Order Sample' row, which is selected. A red arrow points from this row to the 'Select' button in the main window. A third red circle 'c' highlights the 'Select' button in the main window.

Title	Contract Name	OAKS PO No.	Local PO No.
PO #123	Contract Test 1	98765432100	
OCI General 080001-05-F...	OCI General 080001-05-F...		
CMR-DB Test	DB Test		
Plumbing PO	McClellan Construction Agree...	0000010231	
JFS-116011 PR1	My Company		
AGO-100005	My Company		
AGO-090001 PR5	Agreement	00000252	
Sample Purchase Order	Bruce's Contract		
Test Purchase Order	BEN&JERRY'S BPS SANITATION	1234567890	
Purchase Order Sample	Agreement S4	1234567890	



Apply PO to Record

- ▶ Your task is complete! You have now funded your record
- ▶ You can now send the record forward to the next step



Questions?

Please contact OAKS CI Support Desk:

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614.644.2211

