

# OAKS CI - Using the Contract SOV Import Template

## State of Ohio Standard Forms and Documents

---

This job aid describes how to use the OAKS CI Contract SOV Template to create and upload a complete schedule of values. Using the template will simplify the creation of most project SOVs as compared to entering the SOV directly into the OAKS CI user interface.

Before beginning, it should be understood that using the template will require execution of a provided macro on the contractor's computer. If your company's security rules will not permit this then you cannot use the OAKS CI Contract SOV Template.

To use the template follow these steps

### 1) Create the SOV in the template

Note: OAKS CI WBS Codes use the CSI MasterFormat Division number to classify work. We encourage project teams to include the full CSI MasterFormat specification section number as the first element in the short description as this provides an effective means of sorting the line items when preparing pay requests.

- Locate the appropriate WBS Code and add a short description (50 character limit) of the work item, and the \$\$ amount. If this item is performed by an EDGE sub or supplier enter the sub/supplier name exactly as it was entered on the OAKS CI subcontractor/supplier declaration record.
- In most SOVs, you will need to duplicate some WBS Codes to enter many line items against the same code. Copy entire lines, not just cells!!!
- Just leave unused rows empty
- Remember the Short description carries forward to your pay request.
- Any Notes will simply be copied to the Notes field.

### 2) Review/Modify/Agree to the SOV in the template

Using the Excel template, the Contractor, A/E, and Project Manager should review, modify, and eventually agree to the SOV. The SOV can be changed after it is loaded to OAKS CI but it is easier to view and change in Excel.

### 3) Contractor click "Prepare Interface File" button

Open the completed template, enable Excel macros if necessary and click the Prepare Interface File button.

The macro creates a new file in same director with the .csv extension.

Read any error messages and make corrections as instructed.

### 4) In Unifier, create a new Contract SOV record and import the csv file.

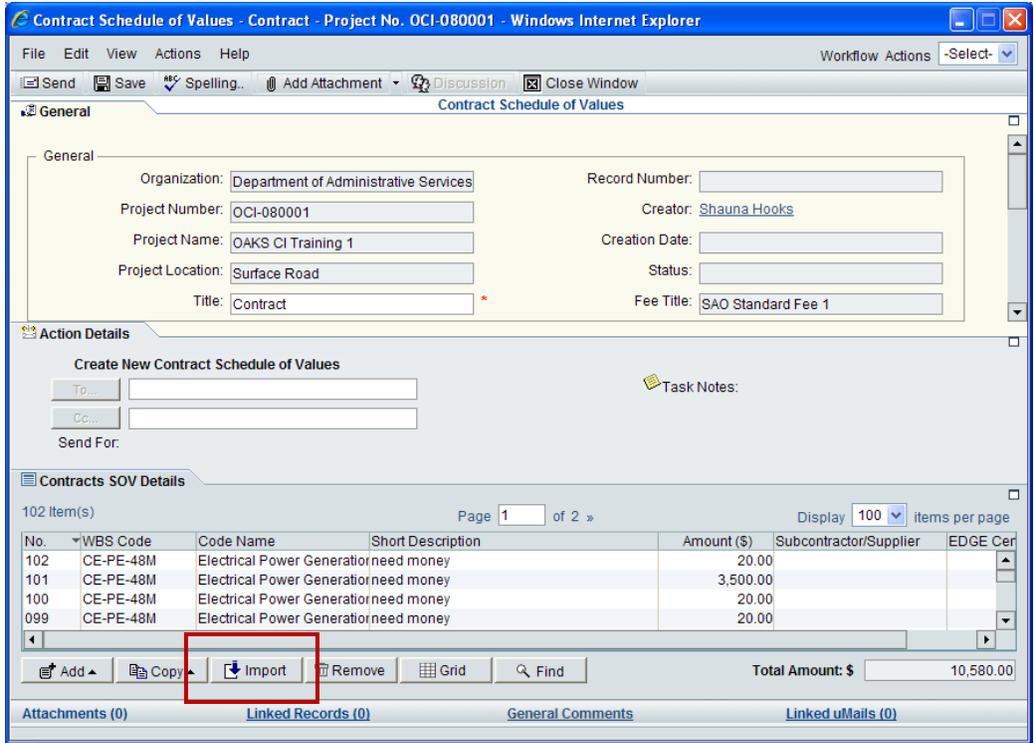
Collaboration → New → Contract Schedule of Values

Select the appropriate work flow if required

Select your Contract and enter the Title

Click 'Import' on the lower portion of the form.

# OAKS CI - Using the Contract SOV Import Template



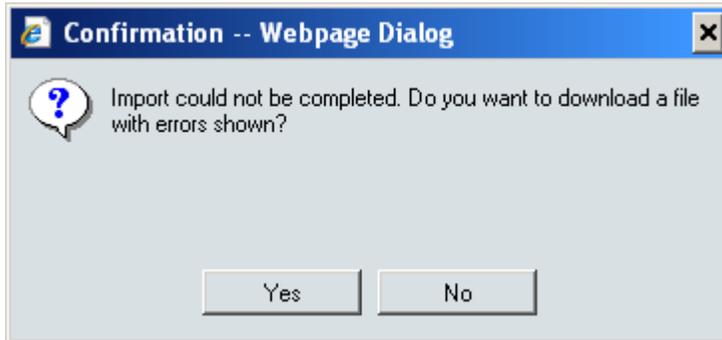
Click 'Browse' in the upper right corner of the next window

Locate your csv file in the Choose File window, highlight it, and click Open

Click OK to initiate uploading of the csv file.

If all is well, your SOV line items will appear under the Contracts SOV Details tab.

If your import file failed you may get this error:



Select Yes, open the file, read any error messages and make corrections. If any errors occur, nothing is imported. Correct the Excel template and recreate the csv.

## 5) Send the SOV to the A/E for approval.

If the line item total to the same amount as the Contract, you may select a workflow action and Submit the SOV for approval by the other participants.