



GMP Amendment & Subcontract Distribution

Agency/Higher-Ed

GMP Amendment

DocuSign Enabled Record

- ▶ The Contract Modification Record workflows now utilize DocuSign, which enables electronic signature of change orders.
 - ▶ GMP Amendment
 - ▶ Proposal Request
 - ▶ Request for Change Order
 - ▶ Change Directive
- ▶ Users who are sent a Contract Modification for signature via DocuSign do not need a separate account to sign the document. However, it is recommended. You can sign up for a free DocuSign account at docusign.net
- ▶ For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website.

GMP Amendment Purpose

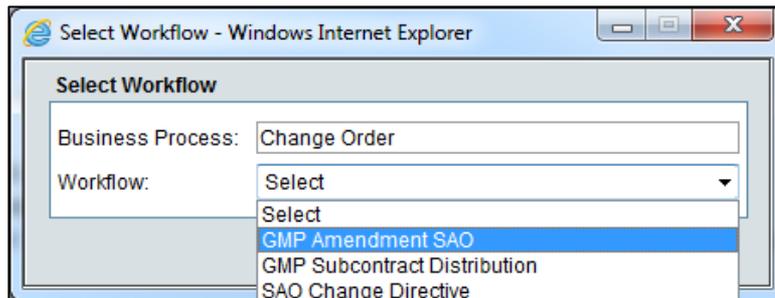
- ▶ GMP Amendment represents the total maximum amount to be paid by the owner. It includes the cost of all the work, general conditions, contingency, and the fee payable to the CM at Risk or Design Build team.

- ▶ Workflow

Created by: **CMR/DB** → Sent to: **PM Review** → Sent to: **CMR/DB Update (if necessary)** → Sent to: **PC Validation and Document Prep** → Sent to: **Vendor Signature via DocuSign**

GMP Amendment Creation

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Change Order
 - ▶ Click New
 - ▶ Select GMP Amendment Workflow and Click OK



ORACLE PRIMAVERA Unifier

Agency General... Home Campus Resear... Northcoast

Navigate To...

User Admin

File Edit View Help

New Copy Open Find

Change Order - Current View: All

13 Item(s)

CO No.	CO Type	Contract
CO-18	Proposal Request	OCI Te
PR-001	Proposal Request	OCI Te
01	Request for Change Order	OCI Te
001	Request for Change Order	OCI Te
1	Request for Change Order	OCI Te
1234	Change Directive	OCI Te
j	Request for Change Order	OCI Te
6	Request for Change Order	OCI Te
5		OCI Te
3		OCI Te
123		OCI Te
1	Proposal Request	OCI Te
	Proposal Request	OCI Te

72 Hour Notice

Action Items

Advertisements

Budget - Initial

Budget - Revisions

Change Order

Closeout - Contractor

Closeout - Professional S...

Contract

Contract Schedule of Valu...

GMP Amendment

- ▶ Select the Contract Reference
- ▶ Once the contract is selected, many fields will auto populate.
- ▶ Complete all open fields, fields marked with a red * are mandatory

The screenshot displays a web application window for creating a new change order. The window title is "Create New Change Order - Project No. SAT-120002 - Windows Internet Explorer". The application has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with icons for "Send", "Save", "Spelling..", "Add Attachment", "Discussion", "SOV", and "Close Window". The main content area is titled "Change Order" and is divided into several sections:

- General:** This section contains various fields for project information. A red arrow points to a "Select..." dropdown menu next to the "Contract Reference" field, which is circled in red. Other fields include "Organization" (Department of Administrative Services), "Project Number" (SAT-120002), "Project Name" (SAT 7 CM-R Test Project), "Project Location" (GSD Surface Rd), "Title" (GMP Amendment), "Record Number", "Creator" (Shauna Hooks), "Creation Date", "Status", "Trade" (General Trades), "Contractor Name" (DM Construction Services), "EDGE Certified Prime?" (No), "Change Order Type" (GMP Amendment), and "Fee Title" (SAO Standard Fee 1).
- GMP Amendment Contract Sum:** This section contains fields for cost and contingency. Fields include "General Conditions Cost % Cap" (3.3), "Contingency % Cap" (1.5), "Construction Design Services Fee % Cap", "CM/DB Fee % Cap" (3), "Cost of the Work (\$)" (0.00), "Construction Personnel Costs (\$)", "Construction Personnel Cost Cap (\$)" (329,363.00), "General Conditions Costs (\$)", "General Conditions Costs Cap (\$)" (0.00), and "Subcontracted Work".
- Action Details:** This section is currently empty.
- Line Item List:** This section is currently empty.

At the bottom of the window, there are four tabs: "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

GMP Amendment

- ▶ Click on the 'Line Item List' Tab

Change Order - GMP #1 - Project No. SAT-120002 - Windows Internet Explorer

File Edit View Actions Help

Accept Task Decline Task SOV Close Window

General Change Order

GMP Amendment Contract Sum

General Conditions Cost % Cap:	3.3	Contingency % Cap:	1.5
Construction Design Services Fee % Cap:	0	CM/DB Fee % Cap:	3

Cost of the Work (\$):	7,394,231.50	Construction Stage Personnel Costs (\$):	329,363.00	Construction Personnel Cost Cap (\$):	329,363.00
		General Conditions Costs (\$):	243,831.00	General Conditions Costs Cap (\$):	244,009.64
		Subcontracted Work (\$):	6,450,000.00		
		Self-Performed Work (\$):	371,037.50		

Contingency (\$):	110,913.47	Contingency Cap (\$):	110,913.47
Construction Design Services Fee (\$):	0.00	Construction Design Services Fee Cap (\$):	0.00
CM/DB Fee (\$):	217,200.00	CM/DB Fee Cap (\$):	221,826.95

Contract Sum (\$):	7,722,344.97	Total Amount (\$):	7,722,344.97
		Line Item Total (\$):	7,722,344.97
		Difference (\$):	0.00

Task Details

Line Item List

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

GMP Amendment

- ▶ Click Add

Windows Internet Explorer window: Create New Change Order - Project No. SAT-120002

Workflow Actions: -Select-

File Edit View Actions Help

Send Save Spelling.. Add Attachment Discussion SOV Close Window

Change Order

General

Action Details

Line Item List

Current View: All

0 Item(s) Page 1 of 1 Display 100 items per page

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/
-----	-----------	----------	-----------	-------------------	--------	----------------

Bottom toolbar: Add (circled in red), Copy, Import, Remove, Grid, Find

Total Amount: \$ 0.00

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

GMP Amendment

- ▶ Click the arrow next to WBS code
- ▶ Choose the appropriate WBS code from the list and click Select

Line Item - Windows Internet Explorer

Spelling... Attach Delete Line Item

Change Order Line Item:

General

Reference: **Select**

WBS Code: **Select**

Code Name:

Short Description:

Amount (\$):

EDGE Certified Prime Contractor?:

Subcontractor/Supplier: **Select...**

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

Attachments (0) [Linked Records \(0\)](#)

OK Cancel

WBS Picker - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_code?

Select Expand Collapse Find Close Window

Select WBS Code

	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
56	AE-00-00	Professional Design Summary
89	RF-00-00	Regulatory Fees Summary
98	CM-00-00	Construction Management Summary
126	CE-00-00	Construction Execution Summary
214	Cx-00-00	Commissioning Summary
236	FE-00-00	F F and E Summary
247	AA-00-00	Acquisition of Art Summary
251	PM-00-00	Project Management Summary
274	ES-00-00	Energy Services Summary
313	ID-00-00	Interior Design Summary
340	CMR-00-00	CM at Risk Summary
358	DB-00-00	Design Build Summary
359	DB-DB-00	DB Services Generay
362	DB-PSC-00	DB Precon Stage Comp Summary
363	DB-PSC-BE	DB Precon Stage Comp Budget
364	DB-PSC-OMS	DB Organizational Meeting Fee
365	DB-PSC-PVS	DB Program Verification Fee
366	DB-PSC-SDS	DB Schematic Design Fee
367	DB-PSC-DDS	DB Design Development Fee
368	DB-PSC-GMS	DB GMP Amendment Fee
369	DB-PSC-CDS	DB Construction Documents Fee
370	DB-PSC-PXS	DB Precon Personnel Expense
371	DB-PSC-RES	DB Precon Reimbursable Expenses
372	DB-PDF-00	DB Precon Design Fee Summary
380	DB-CSC-00	DB Const Stage Comp Summary

GMP Amendment

- ▶ Complete all fields marked with a red * then click OK

The screenshot shows a web browser window titled "Line Item - Google Chrome" with the URL <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=forr>. The browser's address bar shows the URL. Below the address bar, there are navigation buttons: "Spelling...", "Attach", and "Delete Line Item".

The main content area is titled "Change Order Line Item:" and contains a "General" section. The fields in this section are:

- Reference: Select...
- WBS Code: *
- Code Name:
- Short Description: *
- Amount (\$): *
- EDGE Certified Prime Contractor?:
- Subcontractor/Supplier: Select...
- Subcontractor/Supplier:
- EDGE Certified Sub?:

Below the "General" section is a "Notes:" field with a text area.

At the bottom of the form, there are two buttons: "OK" and "Cancel". The "OK" button is circled in red.

At the bottom left of the form, there is a link for "Attachments (0)" and at the bottom right, a link for "Linked Records (0)".

GMP Amendment

▶ Sample of Completed Lower Form

Change Order - Thomas & Marker GMP Amendment - Project No. DOT-130006 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=8835&model=uco&fromcostlog=1&project_id=15

File Edit View Actions Help

Save Spelling.. Add Attachment SOV Close Window

Change Order

General

Task Details

Line Item List

Current View: All Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontr
024	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 22.0 - Plumbing	\$665,000.00	
023	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 21.0 - Fire Suppression	\$71,980.00	
022	0	CE-CE-SW	Subcontractor Work Allowance	Pre-Engineered Buildings / Structures	\$913,225.00	
021	0	CE-CE-SW	Subcontractor Work Allowance	Window Treatments	\$1,975.00	
020	0	CE-CE-SW	Subcontractor Work Allowance	Specialty Equipment	\$192,350.00	
019	0	CE-CE-SW	Subcontractor Work Allowance	Division 10 Specialties	\$41,650.00	
018	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 9.2 - Painting	\$48,750.00	
017	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 9.1 - Flooring	\$13,329.00	
016	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 9.0 Drywall Framing	\$142,587.00	
015	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 8.0 Overhead Doors	\$83,900.00	
014	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 6.0 - Openings	\$124,323.00	
013	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 7.0 - Thermal & Moisture Protecti	\$37,366.00	
012	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 6.0 - Rough Carpentry	\$55,526.00	
011	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 5.0 - Misc Steel	\$1,900.00	
010	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 4.0 - Masonry	\$52,224.00	
009	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 3.0 - Concrete	\$1,246,479.00	
008	0	DB-CSC-CFS	DB Construction Stage Fee	Constructon Stage Fee	\$247,975.00	
007	0	DB-CSC-CDF	DB Construction Stage Design Fee	Construction Stage Design Fee	\$19,370.00	Sands
006	0	DB-CSC-CDF	DB Construction Stage Design Fee	Construction Stage Design Fee	\$72,508.00	
005	0	DB-CSC-PXS	DB Const Stage Personnel Expense	Construction State Personnel Expense	\$186,800.00	
004	0	CE-CE-SW	Subcontractor Work Allowance	Soils Allowance	\$30,000.00	
002	0	CE-01-BE	General Conditions Budget	General Conditons	\$218,800.00	
001	0	OR-CF-DB	Design-Build Contingency	Contingency	\$150,546.00	

Grid Find

Total Amount: \$7,336,404.00

Attachments (7) Linked Records (0) General Comments (0) Linked Mail (0)

GMP Amendment

- ▶ Once the record is complete, go to the upper right hand corner of your form and click the arrow next to Workflow Action, choose Submit
- ▶ Click Send

Workflow Actions: Submit

Submit

Send

Submit

General

Organization: Department of Administrative Services
Project Number: OCI-080001
Project Name: OAKS CI Training 1
Project Location: Surface Road

Record Number:
Creator: Katie Tuttle
Creation Date:
Status:

Action Details

Submit

To...: Barbara Taylor, Consultant Student1, Consultar

Cc...:

Send For: Associate Review

Task Notes:

Line Item List

Current View: All

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontr
001	0	DB-PSC-OMS	DB Organizational Meeting Fee	Organizational Meeting Fee	\$500.00	

Total Amount: \$500.00

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

GMP Subcontract Distribution

GMP Subcontractor Distribution

- ▶ GMP Subcontractor Distribution allows the CMR/DB the opportunity to identify how the contract amount will be distributed. This record functions much like the Contract SOV and will automatically update the Contract SOV upon approval.

- ▶ Workflow

Created by: **CMR/DB** → Sent to: **PC Validation** → Sent to:
PM Approval

Navigate to Spreadsheet

- ▶ Step 1: Open Excel spreadsheet from website:
<http://ofcc.ohio.gov>
 - ▶ Click- Documents Tab
 - ▶ Click- Standard Forms
 - ▶ Click- Procurement Tab
 - ▶ Click- Oaks CI Contract SOV Import Template- Contractor (Cloud)(Excel)

The screenshot shows the OFCC website interface. At the top left is the OFCC logo (OHIO FACILITIES CONSTRUCTION COMMISSION). A navigation menu includes 'About', 'Documents' (highlighted), 'Services / Programs', 'News / Events', 'Opportunities', 'Resources', and 'Gallery'. Under 'Documents', there is a sub-menu for 'Standard Forms' with tabs for 'Concept Development', 'Procurement' (selected), 'Design', 'Construction', 'Post-Construction', and 'Misc'. Below the 'Procurement' tab, a note states: '(Note: The Procurement Agreements have moved to the Agreements and Standard Requirements block below). Page last updated: December 24, 2015'. A table lists various forms, with the row 'OAKS CI Contract SOV Import Template - Contractor (Cloud) (Excel)' highlighted in red.

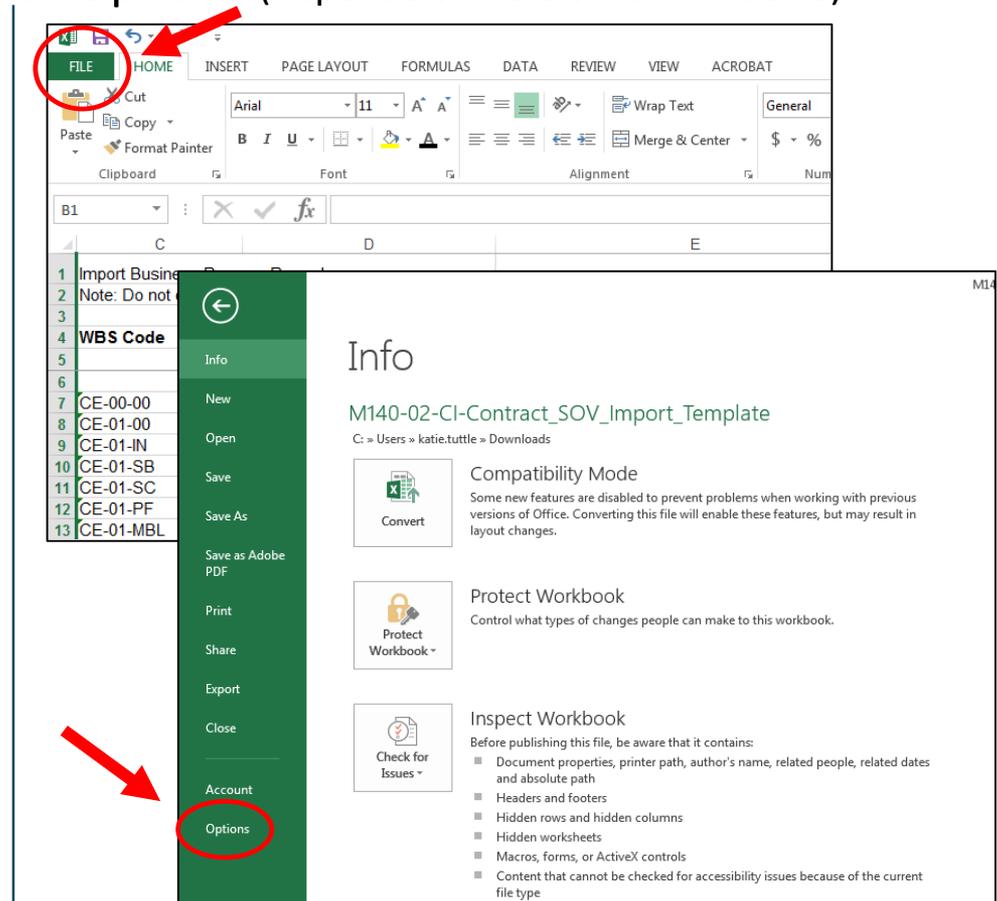
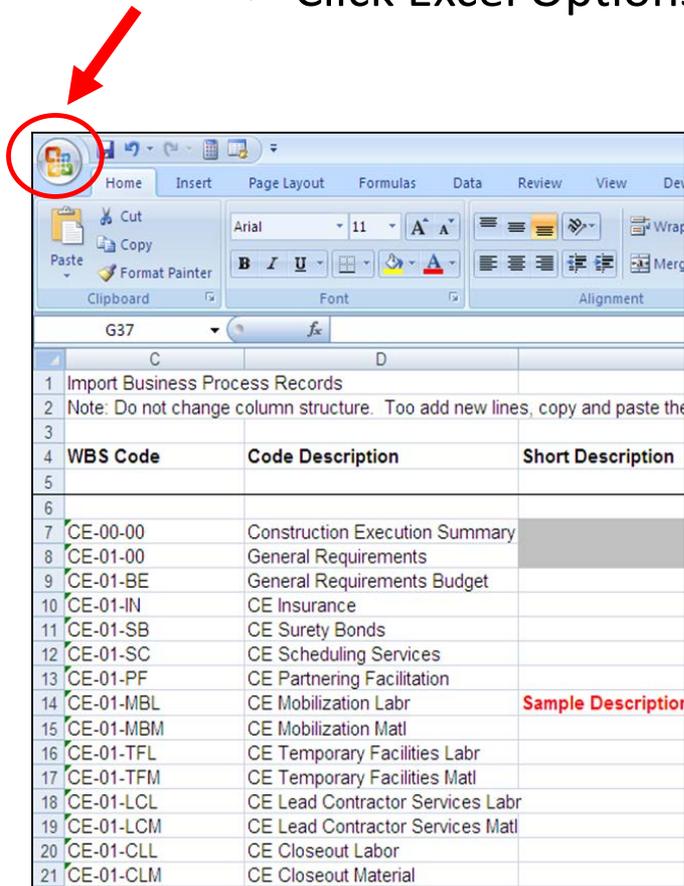
Form Title	Date	Number
OAKS CI Contract SOV Import Template - A/E (Cloud) (Excel)	2015-NOV	M140-05-CI
OAKS CI Contract SOV Import Template - A/E (K-12) (Excel)	2015-NOV	M140-05-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (Cloud) (Excel)	2015-NOV	M140-06-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (K-12) (Excel)	2015-NOV	M140-06-CI
OAKS CI Contract SOV Import Template - Contractor (Cloud) (Excel)	2015-NOV	M140-02-CI
OAKS CI Contract SOV Import Template - Contractor (K-12) (Excel)	v0314	M140-07-CI
OAKS CI Contract SOV Import Template - Owner Agent (Cloud) (Excel)	2015-NOV	M140-08-CI
OAKS CI Contract SOV Import Template - Owner Agent (K-12) (Excel)	2015-NOV	M140-08-CI
OAKS CI Contract SOV Import Template - Renovation Work (K-12) (Excel)	v0314	M140-09-CI

Enable Macros

▶ Step 2: Your Macros must be enabled to be able to prepare this file.

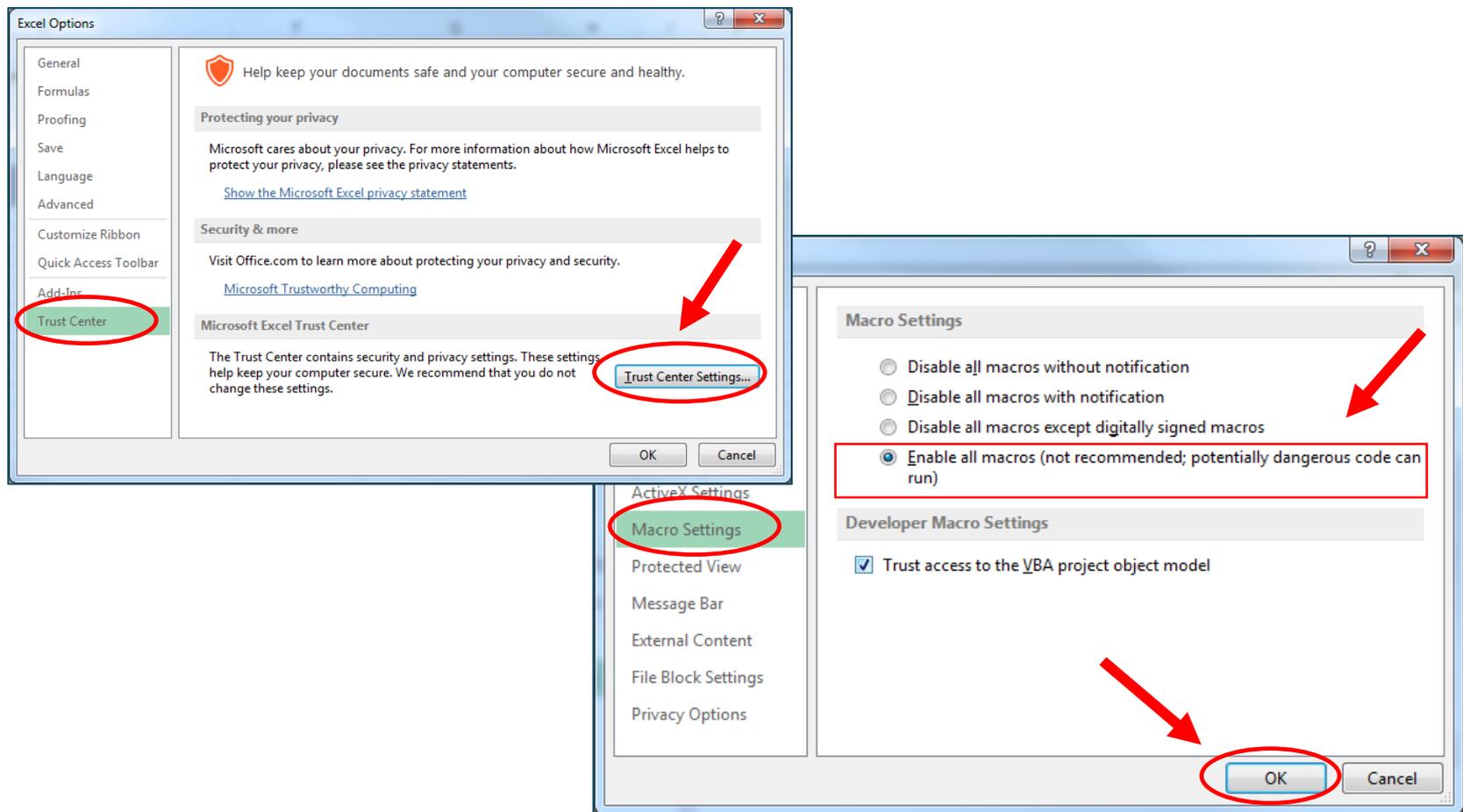
▶ To check that your macros are enabled:

- ▶ Click the Windows Circle or File (depends on version of Windows)
- ▶ Click Excel Options or Options (depends on version of Windows)



Enable Macros

- ▶ Click Trust Center -> Trust Center Settings
- ▶ Click Macro Settings
 - ▶ Choose “Enable all macros”
 - ▶ Check the “Trust access to the VBA project object model” box



Enter Line Items

▶ Step 3: Enter Line Items

	C	D	E	F	G	H
1	Import Business Process Records					
2	Note: Do not change column structure. Too add new lines, copy and paste the entire line to be repeated.			Prepare interface file		
3						
4	WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
5				\$9,500.00		
6						
7	CE-00-00	Construction Execution Summary				
8	CE-01-00	General Requirements				
9	CE-01-BE	General Requirements Budget				
10	CE-01-IN	CE Insurance				
11	CE-01-SB	CE Surety Bonds				
12	CE-01-SC	CE Scheduling Services				
13	CE-01-PF	CE Partnering Facilitation				
14	CE-01-MBL	CE Mobilization Labr	Sample Description	\$3,000.00		
15	CE-01-MBM	CE Mobilization Matl				
16	CE-01-TFL	CE Temporary Facilities Labr				
17	CE-01-TFM	CE Temporary Facilities Matl				
18	CE-01-LCL	CE Lead Contractor Services Labr				
19	CE-01-LCM	CE Lead Contractor Services Matl				
20	CE-01-CLL	CE Closeout Labor				
21	CE-01-CLM	CE Closeout Material				
22	CE-01-OTL	CE General Conditions Labor				
23	CE-01-OTM	CE General Conditions Material				
24	CE-FC-00	Facility Construction				
25	CE-FC-BE	Facility Construction Budget	Sample Description	\$1,000.00	Sample Subcontractor	
26	CE-FC-02L	Existing Conditions Labr				

Adding Additional Lines

- ▶ Step 4: If necessary, add additional lines to the spreadsheet
 - ▶ Left click on the number of the line to highlight it
 - ▶ Right click and choose copy

The screenshot shows the Microsoft Excel interface with the following data:

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
			\$94.00		
CE-00-00	Construction Execution Summary				
CE-01-00	General Requirements				
CE-01-IN	CE Insurance				
CE-01-SB	CE Surety Bonds	surety bonds	\$25.00	bill's concrete	
CE-01-SC	CE Scheduling Services				
CE-01-PF	CE Partnering Facilitation				
CE-01-MBL	CE Mobilization Labr				
CE-01-MBM	CE Mobilization Matl	Trucks Mtl	\$35.00		
CE-01-TFL	CE Temporary Facilities Labr				
CE-01-TFM	CE Temporary Facilities Matl				
CE-01-LCL	CE Lead Contractor Services Labr				
CE-01-LCM	CE Lead Contractor Services Matl				
CE-01-CLL	CE Closeout Labr				
CE-01-CLM	CE Closeout Matl				
CE-01-OTL	CE General Conditions Labr				
CE-01-OTM	CE General Conditions Matl				
CE-FC-00	Facility Construction				
CE-FC-02L	Existing Conditions Labr				
CE-FC-02M	Existing Conditions Matl				
CE-FC-03L	Concrete Labr		\$34.00		
CE-FC-03M	Concrete Matl				
CE-FC-04L	Masonry Labr				
CE-FC-04M	Masonry Matl				
CE-FC-05L	Metals Labr				
CE-FC-05M	Metals Matl				
CE-FC-06L	Wood Plastic and Composite Labr				
CE-FC-06M	Wood Plastic and Composite Matl				
CE-FC-07L	Thermal and Moisture Protn Labr				
CE-FC-07M	Thermal and Moisture Protn Matl				

Adding Additional Lines

- ▶ Step 4 (cont.):
 - ▶ Right click on the line you want to be **below** the line you are inserting
 - ▶ Choose insert copied cells
 - ▶ Your line will show up above the selected line. You can edit the text in the line as necessary

The screenshot shows an Excel spreadsheet with a table containing construction-related data. The table has the following columns: WBS Code, Code Description, Short Description, Amount (\$), Subcontractor/Supplier, and Notes. Row 18 is selected, and a context menu is open over it. The 'Insert Copied Cells' option is highlighted in the menu. A red arrow points from a text box on the left to the 'Insert Copied Cells' option.

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
CE-00-00	Construction Execution Summary				
CE-01-00	General Requirements				
CE-01-IN	CE Insurance				
CE-01-SB	CE Surety Bonds	surety bonds	\$25.00	bill's concrete	
CE-01-SC	CE Scheduling Services				
CE-01-PF	CE Partnering Facilitation				
CE-01-MBL	CE Mobilization Labr				
CE-01-MBM	CE Mobilization Matl	Trucks Mtl	\$35.00		
CE-01-TFL	CE Temporary Facilities Labr				
CE-01-TFM	CE Temporary Facilities Matl				
CE-01-LCL	CE Lead Contractor Services Labr				
CE-01-LCM	CE Lead Contractor Services Matl				
CE-01-CLL	CE Closeout Labr				
CE-01-CLM	CE Closeout Matl				
CE-01-OTL	CE General Conditions Labr				
CE-01-OTM	CE General Conditions Matl				
CE-FC-00	Facility Construction				
CE-FC-02L	Existing Conditions Labr				
CE-FC-02M	Existing Conditions Matl				
CE-FC-03L	Concrete Labr				
CE-FC-03M	Concrete Matl				
CE-FC-04L	Masonry Labr				
CE-FC-04M	Masonry Matl				
CE-FC-05L	Metals Labr				
CE-FC-05M	Metals Matl				
CE-FC-06L	Wood Plastic and Composite Labr				
CE-FC-06M	Wood Plastic and Composite Matl				
CE-FC-07L	Thermal and Moisture Protn Labr				
CE-FC-07M	Thermal and Moisture Protn Matl				
CE-FC-08L	Openings Labr				

New line
will appear
above here

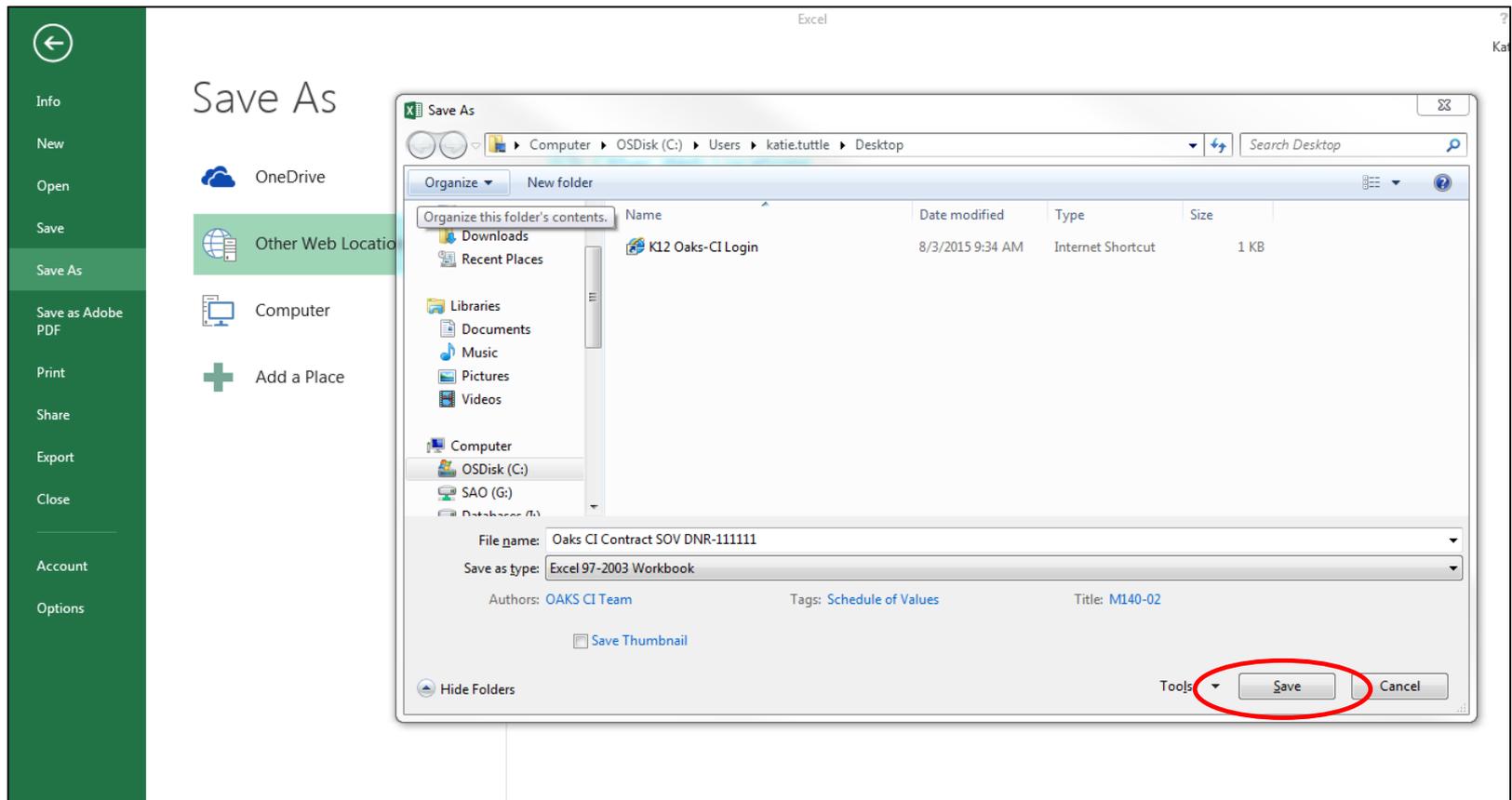
Enter Line Items

- ▶ Step 5:
 - ▶ Include **ONLY** EDGE Subcontractors/Suppliers
 - ▶ Make sure to spell the name of the Subcontractor/Supplier **EXACTLY** the way you spelled it on the Subcontractor/Supplier Declaration

	C	D	E	F	G	H
1	Import Business Process Records			Prepare interface file		
2	Note: Do not change column structure. To add new lines, copy and paste the entire line to be repeated.					
3						
4	WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
5				\$94.00		
21	CE-01-OTL	CE General Conditions Labr				
22	CE-01-OTM	CE General Conditions Matl				
23	CE-FC-00	Facility Construction				
24	CE-FC-02L	Existing Conditions Labr				
25	CE-FC-02M	Existing Conditions Matl				
26	CE-FC-03L	Concrete Labr	concrete labor	\$34.00	Bob's Concrete	
27	CE-FC-03M	Concrete Matl				
28	CE-FC-04L	Masonry Labr				
29	CE-FC-05L	Metals Labr				
30	CE-FC-04M	Masonry Matl				
31	CE-FC-05L	Metals Labr				
32	CE-FC-05M	Metals Matl				
33	CE-FC-06L	Metals Labr				
34	CE-FC-06M	Wood Plastic and Composite Matl				
35	CE-FC-07L	Thermal and Moisture Protn Labr				
36	CE-FC-07M	Thermal and Moisture Protn Matl				

Enter Line Items

- ▶ Step 6:
 - ▶ Name and Save the Spreadsheet- Very Important!

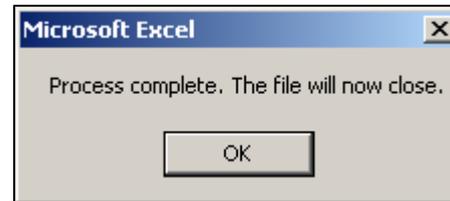


Name and Save Spreadsheet

- ▶ Step 7:
 - ▶ **Make sure you have reviewed your spreadsheet with the Project Manager**
 - ▶ **Click “Prepare Interface File”**

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Sup
			\$9,500.00	
CE-00-00	Construction Execution Summary			
CE-01-00	General Requirements			
CE-01-BE	General Requirements Budget			
CE-01-IN	CE Insurance			
CE-01-SB	CE Surety Bonds			
CE-01-SC	CE Scheduling Services			
CE-01-PF	CE Partnering Facilitation			
CE-01-MBL	CE Mobilization Labr	Sample Description	\$3,000.00	
CE-01-MBM	CE Mobilization Matl			
CE-01-TEI	CE Temporary Facilities Labr			

This box will appear indicating the file preparation is complete.



GMP Subcontract Distribution Creation

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Change Order
- ▶ Click New
- ▶ Select GMP Subcontract Distribution Workflow and Click OK

The screenshot shows the Oracle Primavera Unifier interface. The 'User' menu is open, and the 'Logs' option is highlighted with a red circle. The 'Change Order' menu item is also highlighted with a red circle. The 'New' button in the 'File' menu is circled in red. The main content area displays a table of Change Order items.

CO No.	CO Type	Contract
CO-18	Proposal Request	OCI Te
PR-001	Proposal Request	OCI Te
01	Request for Change Order	OCI Te
001	Request for Change Order	OCI Te
1	Request for Change Order	OCI Te
1234	Change Directive	OCI Te
j	Request for Change Order	OCI Te
6	Request for Change Order	OCI Te
5		OCI Te
3		OCI Te
123		OCI Te
1	Proposal Request	OCI Te
	Proposal Request	OCI Te

The screenshot shows the 'Select Workflow' dialog box in Internet Explorer. The 'Business Process' field is set to 'Change Order'. The 'Workflow' dropdown menu is open, and the 'GMP Subcontract Distribution' option is highlighted with a red circle.

GMP Subcontractor Distribution

- ▶ In the OAKS CI Record, Complete mandatory fields highlighted with a red *

Change Order - Test - Project No. OCI-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=156105&id=5919&sourceId=0&project

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

Change Order

General

Organization: Department of Administrative Services Record Number:

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: OAKS CI Training 1 Creation Date:

Project Location: Surface Road Status:

Title: Test * Trade: Plumbing

Contract Reference: OCI-080001-03 Select... * Vendor Name: OAKS Plumbing

Change Order Type: GMP Amendment EDGE Certified Prime?: Yes

Change Order No.: Fee Title: SAO Standard Fee 1

GMP Amendment Contract Sum

Contingency % Cap: 0

Construction Design 0 CM/DB Fee % Cap: 0

Services Fee % Cap:

Cost of the Work (\$): \$0.00

Construction Stage \$0.00 * Construction Personnel \$0.00

Personnel Costs (\$): Cost Cap (\$):

General Conditions \$0.00 * General Conditions \$0.00

Costs (\$): Costs Cap (\$):

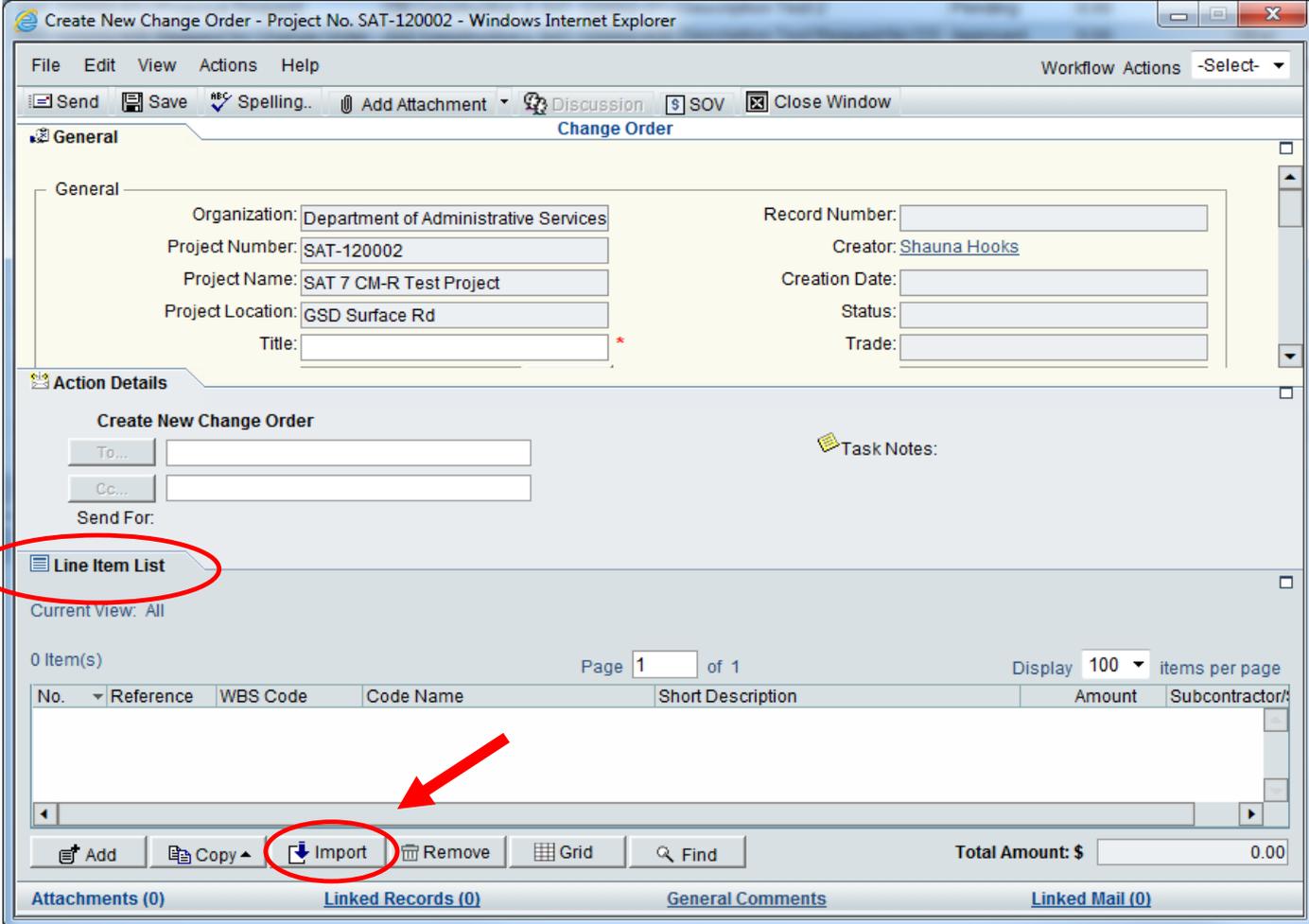
Action Details

Line Item List

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

GMP Subcontractor Distribution

- ▶ Go to the 'Line Item List' Tab and Click 'Import'



Create New Change Order - Project No. SAT-120002 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Change Order

General

Organization: Department of Administrative Services Record Number:

Project Number: SAT-120002 Creator: [Shauna Hooks](#)

Project Name: SAT 7 CM-R Test Project Creation Date:

Project Location: GSD Surface Rd Status:

Title: * Trade:

Action Details

Create New Change Order

To...

Cc...

Send For:

Task Notes:

Line Item List

Current View: All

0 Item(s) Page 1 of 1 Display 100 items per page

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/
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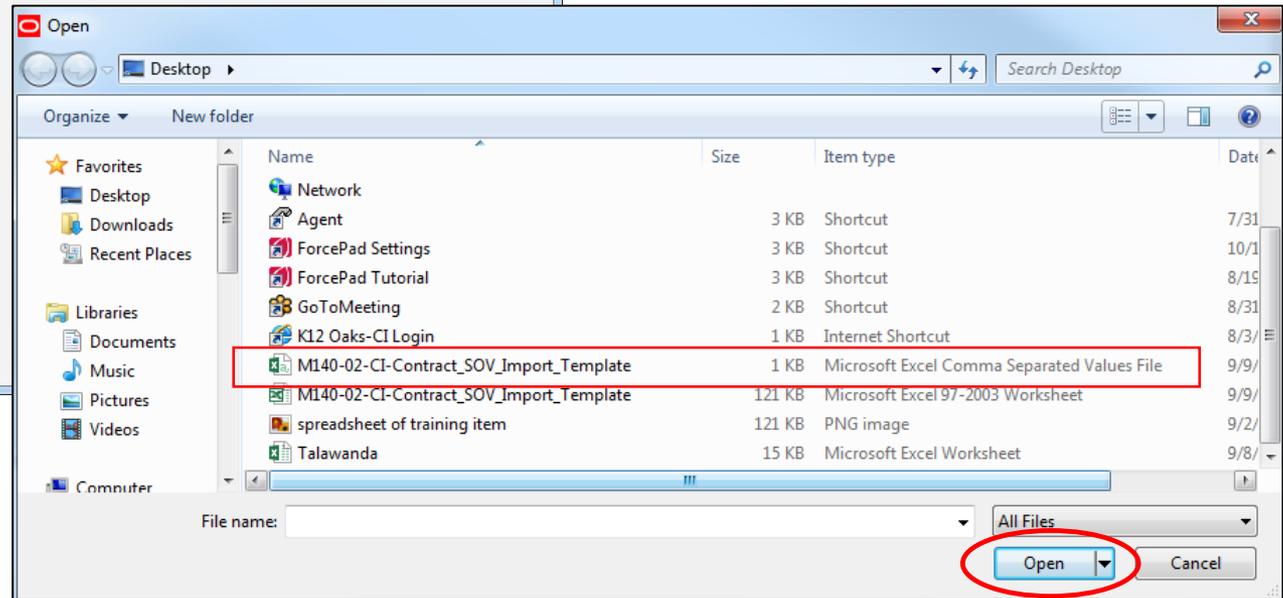
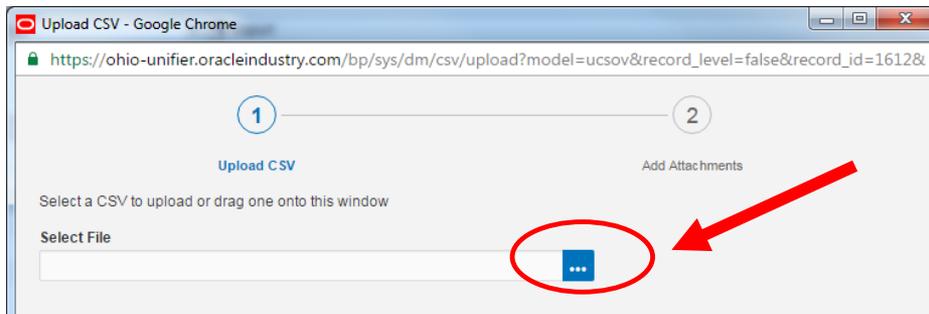
Add Copy Import Remove Grid Find

Total Amount: \$ 0.00

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

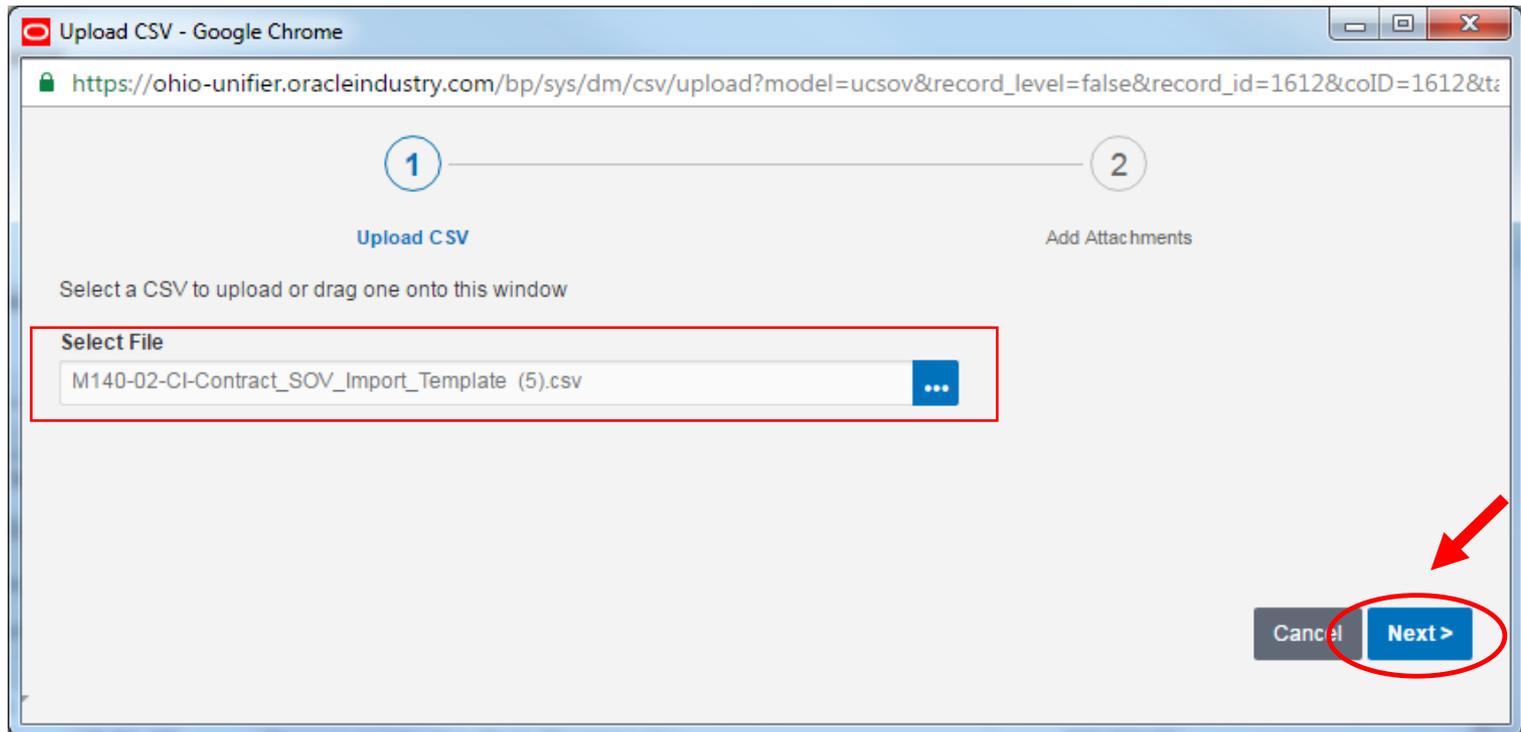
Import Spreadsheet

- ▶ Click the 3 dots next to the “Select File” field
- ▶ Navigate to the “Comma Separated Values (CSV File)” of your spreadsheet and select it
- ▶ Click Open



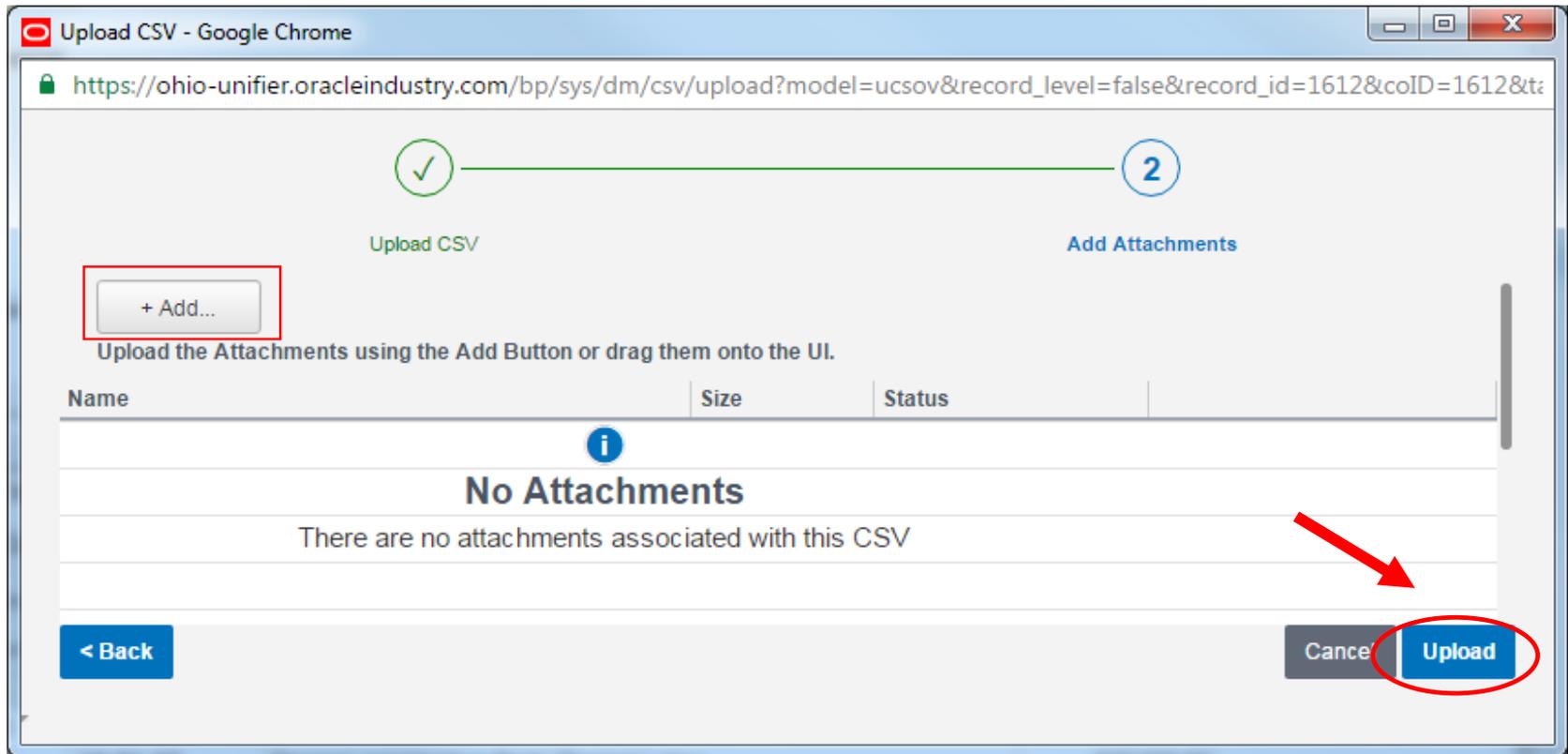
Import Spreadsheet

- ▶ File name should appear in “Select File” field
- ▶ Click Next



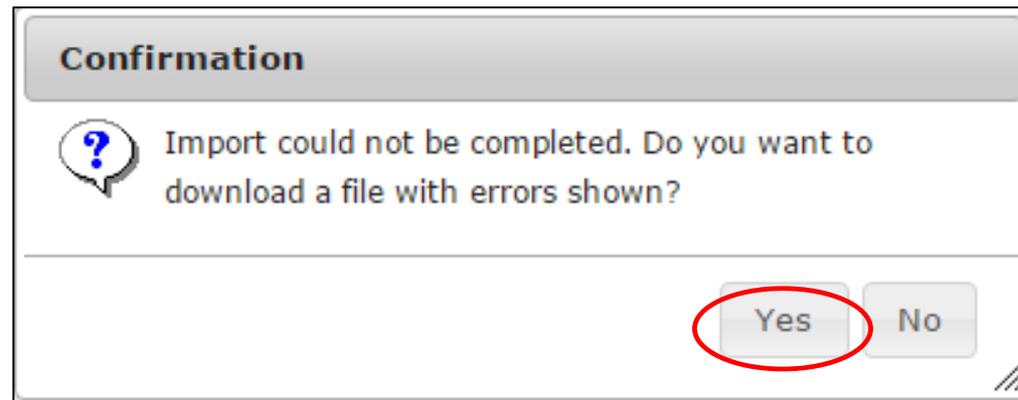
Import Spreadsheet

- ▶ Add any additional attachments if necessary
- ▶ Click Upload



Important Note: Error Message

- ▶ If you receive the following message, please say Yes and email the downloaded excel sheet to the OAKS CI Support Desk: oaksci@ofcc.ohio.gov
- ▶ We will be able to diagnose your error and assist you with your import



GMP Subcontractor Distribution

- ▶ You must now select the line from your SOV that you will be deducting from. This line should be the Subcontracted work line if you have exhausted all of the money from this line then choose your Contingency or other applicable line to fund the imported line items.
- ▶ Once the form has been imported, click the Add button

Change Order - Remaining SOV Distribution - Project No. DOT-130006 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=10208&model=uco&fromcostlog=1&project_id=1

File Edit View Actions Help

Save Spelling.. Add Attachment SOV Close Window

Change Order

General

Task Details

Line Item List

Current View: All Show Currency in: Transaction Currency

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

Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/Sup
17	OR-CF-DB	Design-Build Contingency	Contingency	\$24,495.40	
0	CE-FC-13M	Specialties Matl	Cold Storage 3 Coat Metal Panels	\$52,867.00	Carter Lumber,
195	CE-FC-13M	Specialties Matl	Cold Storage Building - Material	(\$22,679.00)	84 Lumber Co.
0	CE-FC-13M	Specialties Matl	Snow Guards	\$8,706.00	
0	CE-FC-13M	Specialties Matl	PEMB Insulation	\$24,748.00	Bay Insulation
0	CE-FC-11M	Equipment Matl	Welding Curtain	\$582.60	
0	CE-FC-11M	Equipment Matl	Metal Shelving	\$12,450.00	
0	CE-FC-11M	Equipment Matl	Appliances	\$830.00	
0	CE-FC-11M	Equipment Matl	Egress Signs	\$120.00	REM Graphics
0	CE-FC-05M	Metals Matl	Cold Storage Guard Rail	\$3,345.00	Paul Peterson
0	CE-FC-05L	Metals Labr	Cold Storage Guard Rail	\$650.00	Paul Peterson
0	CE-SI-32M	Exterior Improvements Matl	Paving - Top Coat	\$68,697.00	York Paving Cc
0	CE-SI-32L	Exterior Improvements Labr	Paving - Top Coat	\$45,798.00	York Paving Cc
0	CE-SI-32M	Exterior Improvements Matl	Paving - Intermediate	\$65,231.00	York Paving Cc
0	CE-SI-32L	Exterior Improvements Labr	Paving - Intermediate	\$44,488.00	York Paving Cc

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

Total Amount: \$ 0.00

GMP Subcontractor Distribution

- Once you have chosen the Subcontracted work line, add a short description and the amount to be deducted from the code. Ensure the amount you enter is a **negative dollar amount**.

The screenshot shows a web browser window titled "Line Item - Windows Internet Explorer". The main content area is a form titled "Change Order Line Item:". The form has a "General" tab selected. The fields are as follows:

- Reference: Specialties Mtl. (with a "Select..." button)
- WBS Code: CE-A40-03L (with a dropdown arrow and a red asterisk)
- Code Name: (empty field)
- Short Description: Cold Storage (with a red asterisk)
- Amount (\$): -5,000.00 (with a red asterisk and a red circle around the value)
- EDGE Certified Prime Contractor?: No
- Subcontractor/Supplier: (with a "Select..." button)
- Subcontractor/Supplier: (empty field)
- EDGE Certified Sub?: (empty field)

At the bottom of the form, there is a "Notes:" text area. Below the form, there are two buttons: "OK" and "Cancel". At the bottom left, it says "Attachments (0)" and at the bottom right, it says "Linked Records (0)".

GMP Subcontractor Distribution

- ▶ Once complete, your record should look similar to the one shown below
 - ▶ Note the total dollar amount is 0
- ▶ Choose your Workflow action in the upper right hand corner and click Send

Workflow Actions: -Select-, -Select-, Submit

Send Save Spelling.. Add Attachment Discussion SOV Close Window

Change Order

Task Details

Line Item List

Current View: All Show Currency in: Transaction Currency

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

Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/Sup
17	OR-CF-DB	Design-Build Contingency	Contingency	\$24,495.40	
0	CE-FC-13M	Specialties Matl	Cold Storage 3 Coat Metal Panels	\$52,867.00	Carter Lumber,
195	CE-FC-13M	Specialties Matl	Cold Storage Building - Material	(\$22,679.00)	84 Lumber Co.
0	CE-FC-13M	Specialties Matl	Snow Guards	\$8,706.00	
0	CE-FC-13M	Specialties Matl	PEMB Insulation	\$24,748.00	Bay Insulation
0	CE-FC-11M	Equipment Matl	Welding Curtain	\$582.60	
0	CE-FC-11M	Equipment Matl	Metal Shelving	\$12,450.00	
0	CE-FC-11M	Equipment Matl	Appliances	\$830.00	
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0	CE-FC-05M	Metals Matl	Cold Storage Guard Rail	\$3,345.00	Paul Peterson
0	CE-FC-05L	Metals Labr	Cold Storage Guard Rail	\$650.00	Paul Peterson
0	CE-SI-32M	Exterior Improvements Matl	Paving - Top Coat	\$68,697.00	York Paving Co
0	CE-SI-32L	Exterior Improvements Labr	Paving - Top Coat	\$45,798.00	York Paving Co
0	CE-SI-32M	Exterior Improvements Matl	Paving - Intermediate	\$65,231.00	York Paving Co
0	CE-SI-32L	Exterior Improvements Labr	Paving - Intermediate	\$44,488.00	York Paving Co

Grid Find Total Amount: \$0.00

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

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211