



Contract SOV (Schedule of Values)- A/E

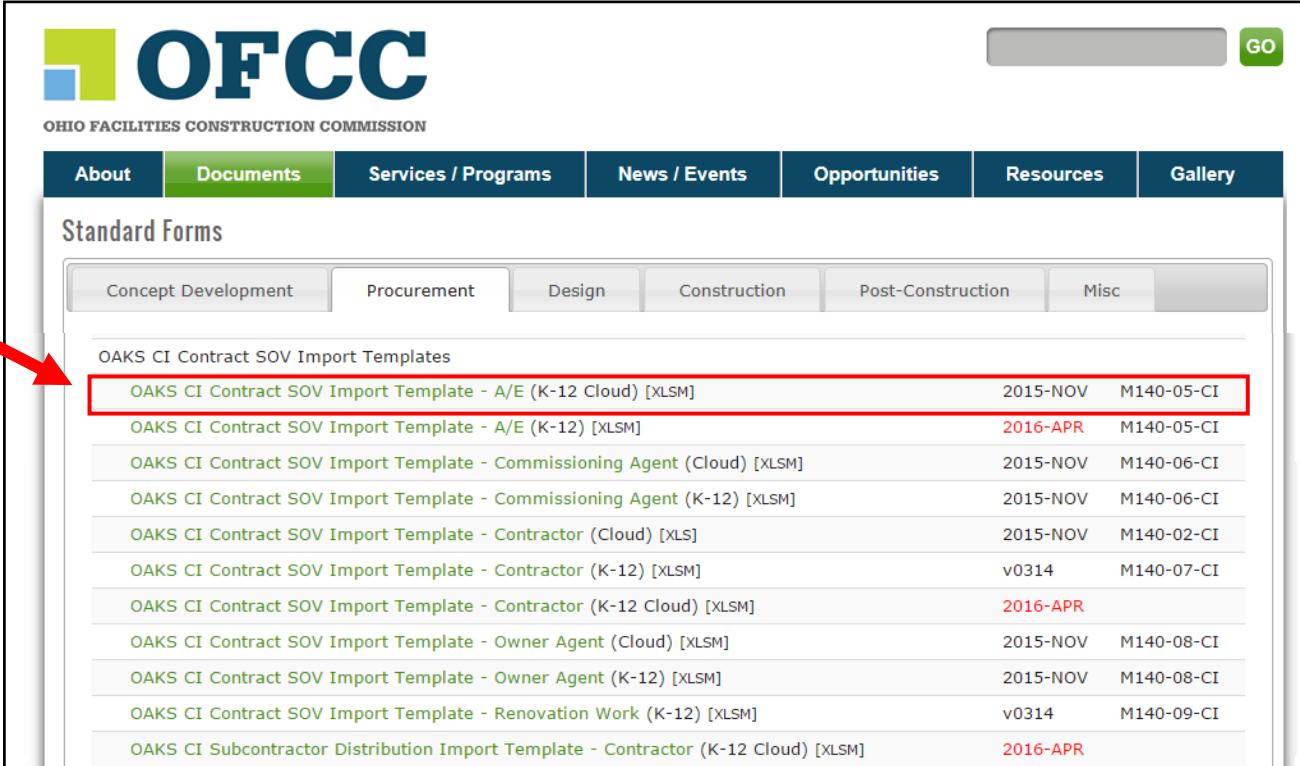
K12 Cloud

Contract SOV Process Overview

- ▶ After the Contract is approved in OAKS CI, the Contract SOV record will be created by the Project Coordinator (PC).
- ▶ The Professional Services Provider will:
 - ▶ Locate and Complete the SOV Spreadsheet
 - ▶ Email the Spreadsheet to the PC
 - ▶ Receive and Review the Contract SOV record in OAKS CI

Navigate to SOV Spreadsheet Template

- ▶ Step 1: Open Excel spreadsheet from website:
<http://ofcc.ohio.gov>
 - ▶ Click- Documents tab
 - ▶ Click- Standard Forms
 - ▶ Click- Procurement Tab
 - ▶ Click Appropriate (K12) Spreadsheet template



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Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

OAKS CI Contract SOV Import Templates

OAKS CI Contract SOV Import Template - A/E (K-12 Cloud) [XLSM]	2015-NOV	M140-05-CI
OAKS CI Contract SOV Import Template - A/E (K-12) [XLSM]	2016-APR	M140-05-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (Cloud) [XLSM]	2015-NOV	M140-06-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (K-12) [XLSM]	2015-NOV	M140-06-CI
OAKS CI Contract SOV Import Template - Contractor (Cloud) [XLS]	2015-NOV	M140-02-CI
OAKS CI Contract SOV Import Template - Contractor (K-12) [XLSM]	v0314	M140-07-CI
OAKS CI Contract SOV Import Template - Contractor (K-12 Cloud) [XLSM]	2016-APR	
OAKS CI Contract SOV Import Template - Owner Agent (Cloud) [XLSM]	2015-NOV	M140-08-CI
OAKS CI Contract SOV Import Template - Owner Agent (K-12) [XLSM]	2015-NOV	M140-08-CI
OAKS CI Contract SOV Import Template - Renovation Work (K-12) [XLSM]	v0314	M140-09-CI
OAKS CI Subcontractor Distribution Import Template - Contractor (K-12 Cloud) [XLSM]	2016-APR	

Enter Contract SOV Line Items

- ▶ Step 2:
 - ▶ Enter Contract SOV Line Items
 - ▶ Include **ONLY** EDGE Consultants
 - ▶ Make sure to spell the name of the Consultant **EXACTLY** the way you spelled it on the Subcontractor/Supplier Declaration

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent	EDGE Certified Prime Contractor?	Associated Building
AE-BS-OM	AE Organizational Meeting Fee						
AE-BS-DS	AE Design Criteria Stage						
AE-BS-BV	AE Best Value Selection Fee						
AE-BS-PV	AE Program Verification Services						
AE-BS-SD	AE Schematic Design Services	Schematic Design	\$400.00	My Design Inc.		Yes	
AE-BS-DD	AE Design Development Services						
AE-SD-GA	AE GMP Negotiation Fee						
AE-BS-CD	AE Construction Docs Services						
AE-BS-BA	AE Bid and Award Services						
AE-BS-CN	AE Conformed Docs Services						
AE-BS-CA	AE Construction Admin Services						
AE-BS-CL	AE Closeout Services						
AE-AS-BC	AE Basic Commissioning						
AE-AS-TI	AE Tests and Inspections						
AE-AS-LD	AE LEED Documentation Services						
AE-AS-CH	AE Charrette Facilitation						
AE-AS-EF	AE Eco Charrette Facilitation						
AE-AS-PF	AE Partnering Facilitation						
AE-AS-SU	AE Site Surveying Services						
AE-AS-GT	AE Geotechnical Investigation						
AE-AS-EN	AE Environmental Survey						
AE-AS-HM	AE Hazardous Materials Survey						
AE-AS-MV	AE Measurement and Verification						
AE-AS-CO	AE Change Order Fees						

Adding Additional Lines

- ▶ Step 3: If necessary, add additional lines to the SOV spreadsheet
 - ▶ Left click on the number of the line to highlight it
 - ▶ Right click and choose copy

The screenshot shows an Excel spreadsheet titled "Legacy_M140-05-CI-Contract_SOV_Template-AE-K12_V2-01_rev1115 - Excel". The spreadsheet contains a table with the following columns: WBS Code, Code Description, Short Description, Amount (\$), Subcontractor/Supplier, LFI Percent, EDGE Certified Prime Contractor?, and Associated Building. The table is divided into sections: "AE Basic Services" (rows 8-13) and "AE Additional Services" (rows 14-21). A red arrow points to row 14, and a context menu is open over it with "Copy" highlighted. The context menu also includes options like "Paste Options", "Paste Special...", "Insert", "Delete", "Clear Contents", "Format Cells...", "Row Height...", "Hide", and "Unhide".

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent	EDGE Certified Prime Contractor?	Associated Building
			\$0.00				
AE Basic Services							
AE-BS-OM	AE Organizational Meeting Fee						
AE-BS-DS	AE Design Criteria Stage						
AE-BS-BV	AE Best Value Selection Fee						
AE-BS-PV	AE Program Verification Services						
AE-BS-SD	AE Schematic Design Services						
AE-BS-DD	AE Design Development Services						
	AE Negotiation Fee						
	AE Action Docs Services						
	AE Award Services						
	AE Conformed Docs Services						
	AE Construction Admin Services						
	AE Closeout Services						
AE Additional Services							
	AE Basic Commissioning						
	AE Tests and Inspections						
	AE LEED Documentation Services						
	AE Charrette Facilitation						
	AE Eco Charrette Facilitation						
	AE Partnering Facilitation						
	AE Site Surveying Services						
	AE Geotechnical Investigation						
	AE Environmental Survey						
	AE Hazardous Materials Survey						
	AE Measurement and Verification						
	AE Change Order Fees						

Adding Additional Lines

- ▶ Step 3 (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

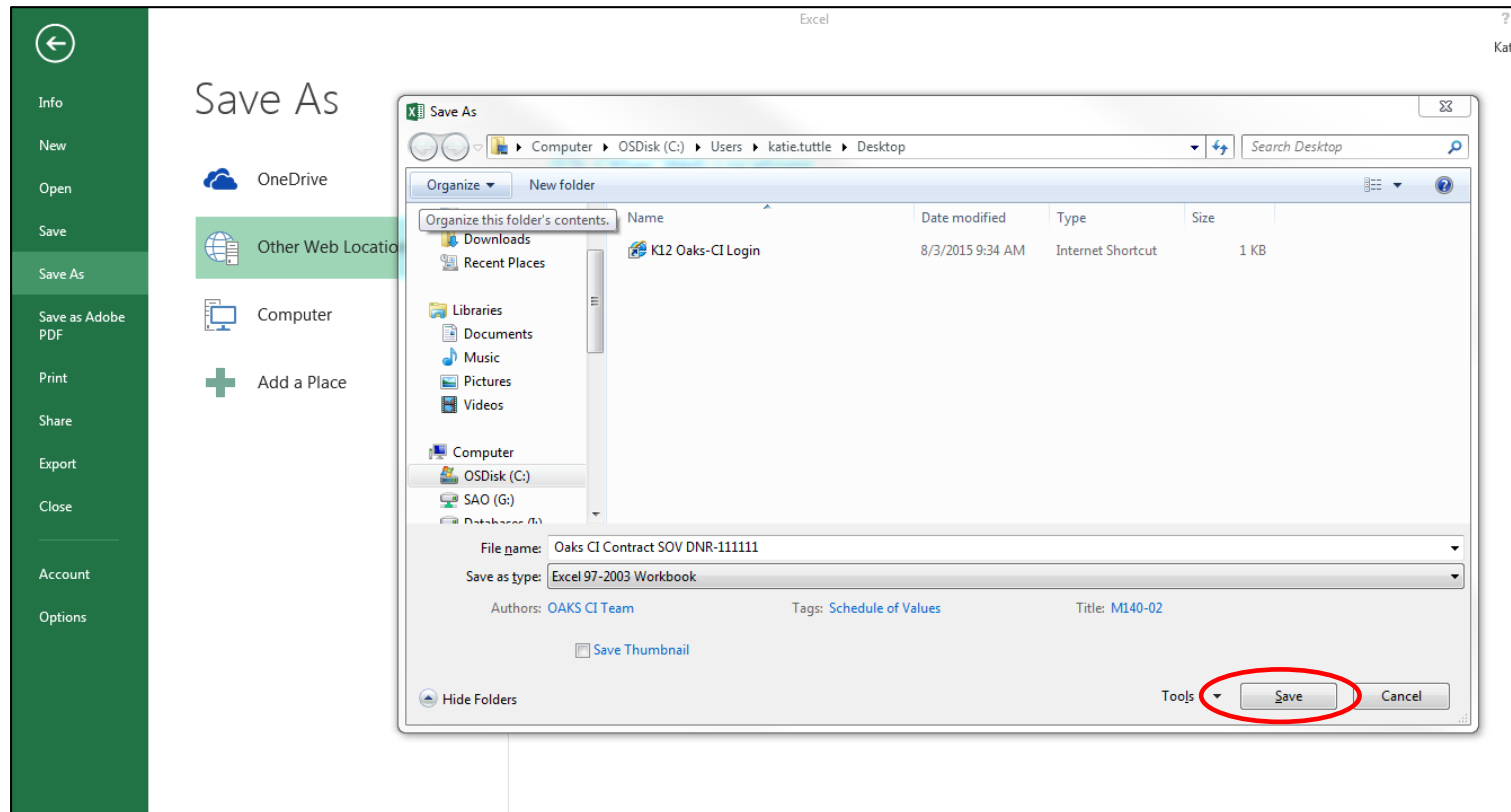
The screenshot shows an Excel spreadsheet with a table of construction items. The table has columns for WBS Code, Code Description, Short Description, Amount (\$), Subcontractor/Supplier, and Notes. Row 18 is selected, and a context menu is open over it. The 'Insert Copied Cells' option is highlighted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

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				
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				
CE-FC-08M	Openings Matl				

New line
will appear
above here

Save and Email your Spreadsheet

- ▶ Step 4:
 - ▶ Name and Save the Spreadsheet
 - ▶ Email the Spreadsheet to your Project Manager and Project Coordinator for review



Contract SOV Record

- ▶ The Contract SOV record will be created by the Project Coordinator and will be sent to you for review
- ▶ You will receive an email notification that you have a Task Pending that needs your attention
- ▶ Click on the link to access your Task

Wed 11/30/2016 11:03 AM

Unifier - Katie Tuttle,soo <unifier_notifications@...>
Contract Schedule of Values K12 SOV-004 is sent to you for Vali

To: Tuttle, Katie

If there are problems with how this message is displayed, click here to view it in a web browser.

This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: **OAKS CI District Training Project 1**

Contract Schedule of Values K12 SOV-004 is sent to you for Validation.

From :	Katie Tuttle
Sent For :	Validation

Source Name :	OAKS CI District Training Project 1
Record No :	Contract Schedule of Values K12 SOV-004
Title :	AE SOV

Unifier Login

For Oracle technical assistance <http://www.oracle.com/us/support>

Accept the Task

- ▶ Click Accept Task to begin reviewing the record

Contract Schedule of Values K12 - AE SOV - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186987&parent_id=0&viewOnly=0&project_id=1084&_uref=uuu146 110%

File Edit View Actions Help

Accept Task Decline Task Cash Flow Review Close Window

Contract Schedule of Values K12

General

General

Project Number: SFC-080001 Record Number: SOV-005
Project Name: OAKS CI District Training Project 1 Creator: Katie Tuttle
Organization Name: OAKS CI District Training Project - 1 Creation Date: 06/19/2017 01:19 PM (UTC-8)
Facility Name: Status: Pending

Task Details

From: Katie Tuttle Task Due Date: Task Notes (0)
To: A.E. Task Status: Not Started Workflow Progress
Cc:
Sent For: Validation

Contracts SOV Details

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI Percent	Subcontractor Supplier	EDC Certifie
006	AE-RE-DP	AE Document Printing	Document Printing	\$75,000.00	0		
005	AE-AS-SU	AE Site Surveying Services	Site Survey	\$100,000.00	0		

Grid Find Show Filtered Total Amount **Total Amount:** \$575,000.00

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

Review the Task

- ▶ Review the SOV record to ensure all information is correct
- ▶ Choose Workflow Action: Accept or Return for Clarification
- ▶ Click Send

Contract Schedule of Values K12 - AE SOV - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186987&model=ucsov&project_id=1084&initiateBP=&bulkautoaccept=&fromRefL 110%

File Edit View Actions Help

Workflow Actions Validated [Send] Save Spelling.. Add Attachment Discussion Cash Flow Review Close Window

General Validated Return for Clarification

Contract Schedule of Values K12

Validate the EDGE and LFI information submitted in this schedule of values.

General

Project Number: SFC-080001 Record Number: SOV-005
Project Name: OAKS CI District Training Project 1 Creator: Katie Tuttle

Action Details

Validated (Click here to view latest content)

To... Archana Atrey, Barbara Taylor, Bill Schwertfager, Task Notes:

Cc... Workflow Progress

Send For: PM Approval

Contracts SOV Details

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI Percent	Subcontractor Supplier	EDGE Certified?
006	AE-RE-DP	AE Document Printing	Document Printing	\$75,000.00	0		

Add Copy Import Remove Grid Find Show Filtered Total Amount Total Amount: \$575,000.00

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

Requesting Payment

- ▶ Once the Contract SOV has been approved in OAKS CI, you will have the ability to create an Application for Payment
- ▶ For more information please see the [Application for Payment Job Aid](#)

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211