



Contract SOV (Schedule of Values)- Contractor

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 Contractor 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

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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 Line Items

▶ Step 2: 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 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 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 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 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 in the 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		\$34.00		
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

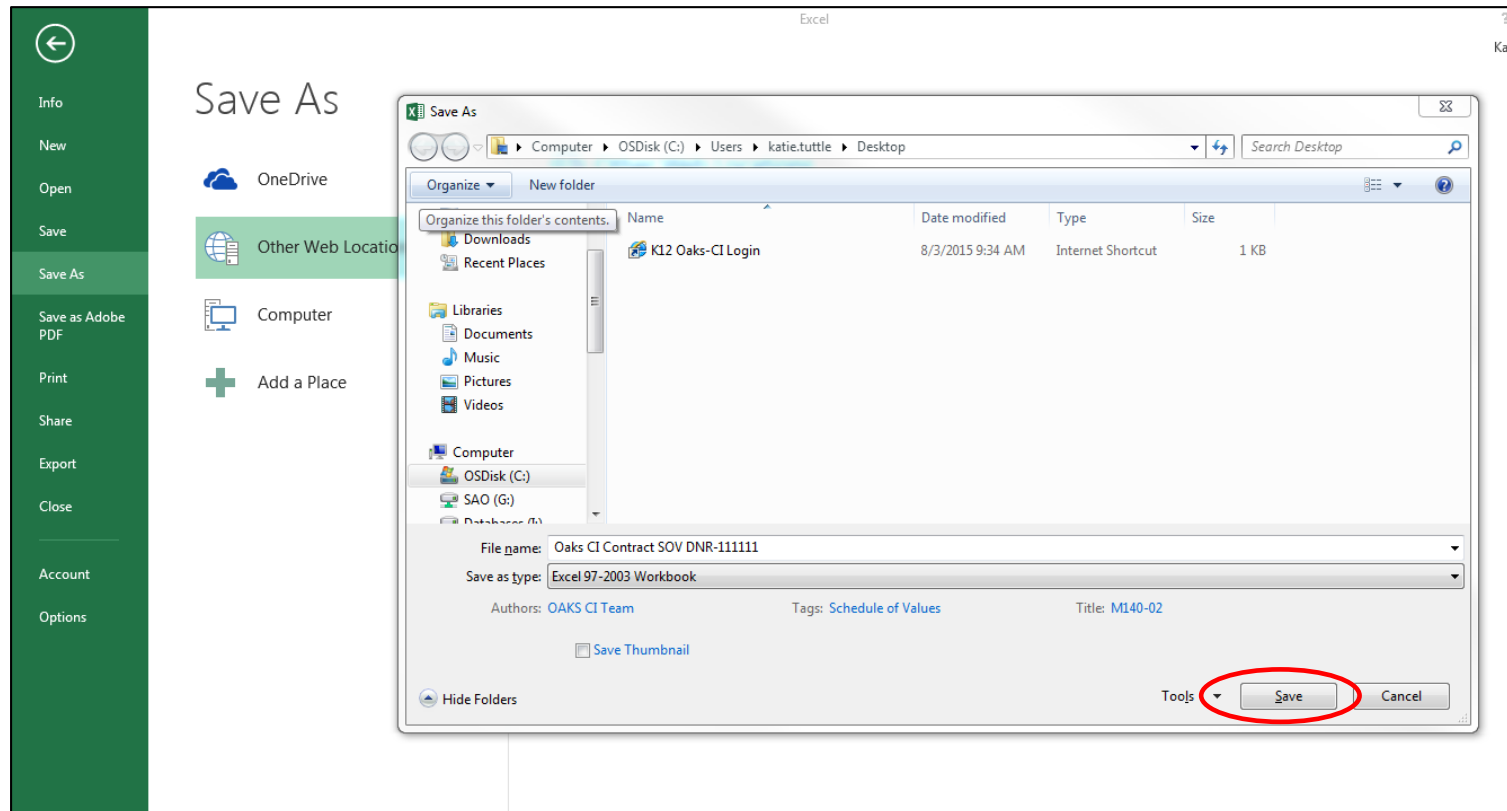
Enter Line Items

- ▶ Step 4:
 - ▶ Enter **all** Subcontractor/Suppliers (ensure they have an approved Subcontractor/Supplier Declaration in OAKS CI)
 - ▶ 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. Too 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 Matl				
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				
37	CE-FC-08L	Openings Labr				
38	CE-FC-08M	Openings Matl				
39	CE-FC-09L	Finishes Labr				
40	CE-FC-09M	Finishes Matl				
41	CE-FC-10L	Specialties Labr				
42	CE-FC-10M	Specialties Matl				
43	CE-FC-11L	Equipment Labr				
44	CE-FC-11M	Equipment Matl				

Save and Email your Spreadsheet

- ▶ Step 5:
 - ▶ Name and Save the Spreadsheet
 - ▶ Email the Spreadsheet to you're A/E, Project Manager, and Project Coordinator for review



Contract SOV Task Notification

- ▶ 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

The screenshot shows an email notification from Unifier. The header includes the sender's name 'Unifier - Katie Tuttle,soo' and the email address 'unifier_notifications@oracle.com'. The subject line is 'Contract Schedule of Values K12 SOV-002 is sent to you for Vendor Approval.' The body of the email contains a system-generated message: 'This is a system-generated e-mail message. Do not reply to sender.' Below this, the project name 'Oak Hills Local Building Project' is displayed. The main message is 'Contract Schedule of Values K12 SOV-002 is sent to you for Vendor Approval.' The email also includes a 'From' field with 'Katie Tuttle' and a 'Sent For' field with 'Vendor Approval'. At the bottom, there is a 'Source Name' field with 'Oak Hills Local Building Project', a 'Record No' field with 'Contract Schedule of Values K12 SOV-002', and a 'Title' field with 'Test 2 SOV'. A red arrow points to a 'Unifier Login' button, which is circled in red. At the bottom of the email, there is a link for Oracle technical assistance: 'http://www.oracle.com/us/support'.

Fri 9/2/2016 2:20 PM

Unifier - Katie Tuttle,soo <unifier_notifications@oracle.com>
Contract Schedule of Values K12 SOV-002 is sent to you for Vendor Approval.

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: Oak Hills Local Building Project

Contract Schedule of Values K12 SOV-002 is sent to you for Vendor Approval.

From : Katie Tuttle
Sent For : Vendor Approval

Source Name : Oak Hills Local Building Project
Record No : Contract Schedule of Values K12 SOV-002
Title : Test 2 SOV

Unifier Login

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

Accept the Task

- ▶ Click Accept Task to begin work on the record

Contract Schedule of Values K12 - Katie's Contracting 2 - Project No. SFC-080001.01 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186732&viewOnly=0&project_id=0&_uref=uuu521:navigator-2

File Edit View Actions Help

Accept Task Decline Task Cash Flow Review Close Window

Contract Schedule of Values K12

General

General

Project Number: SFC-080001.01 Record Number: SOV-007

Project Name: Oak Hills Local Building Project Creator: Katie Tuttle

Organization Name: Creation Date: 06/16/2017 11:07 AM (UTC-8)

Facility Name: Status: Pending

Title: Katie's Contracting 2

Task Details

From: Katie Tuttle Task Due Date: Task Notes (0)

To: CM-R Task Status: Not Started Workflow Progress

Cc:

Sent For: Vendor Approval

Contracts SOV Details

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI Percent	Subcontractor Supplier	EDC Certify
001	CMR-PSC-PVS	CM-R Program Verification Fee	Program verification	\$100,000.00	0		
002	CMR-PSC-DDS	CM-R Design Development Fee	Design Development	\$100,000.00	0		
003	CMR-PSC-CDS	CM-R Construction Docs Fee	Construction Docs	\$100,000.00	0		
004	CMR-PSC-PXS	CM-R Precon Personnel Expense	Personnel	\$200,000.00	0		

Grid Find Show Filtered Total Amount Total Amount: \$500,000.00

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 to send back to the PC
- ▶ Click Send

Contract Schedule of Values K12 - Katie's Contracting 2 - Project No. SFC-080001.01 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustri.com/bp/process/task/open?task_id=186732&model=ucsov&project_id=1086&initiateBP=&bulkautoaccept:

File Edit View Actions Help

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

General: Approve Return For Clarification Cancel

Contract Schedule of Values K12

Review the SOV imported by the PC or OA. You may make modifications if needed or return to the creator for updates.

General

Project Number: SFC-080001.01 Record Number: SOV-007

Project Name: Oak Hills Local Building Project Creator: Katie Tuttle

Organization Name: Creation Date: 06/16/2017 11:07 AM (UTC-8)

Action Details

Approve (Click here to view latest content)

To... Archana Atrey, Barbara Taylor, Bill Schwerfage

Cc...

Send For: AE Review

Task Notes:

Workflow Progress

Contracts SOV Details

Current View: All Show Currency in: Transaction Currency

4 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?
004	CMR-PSC-PXS	CM-R Precon Personnel Ex	Personnel	\$200,000.00	0		
003	CMR-PSC-CDS	CM-R Construction Docs Fe	Construction Docs	\$100,000.00	0		
002	CMR-PSC-DDS	CM-R Design Development	Design Development	\$100,000.00	0		
001	CMR-PSC-PVS	CM-R Program Verification F	Program verification	\$100,000.00	0		

Add Copy Import Remove Grid Find Show Filtered Total Amount Total Amount: \$500,000.00

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