



# Contract SOV (Schedule of Values)- CxA

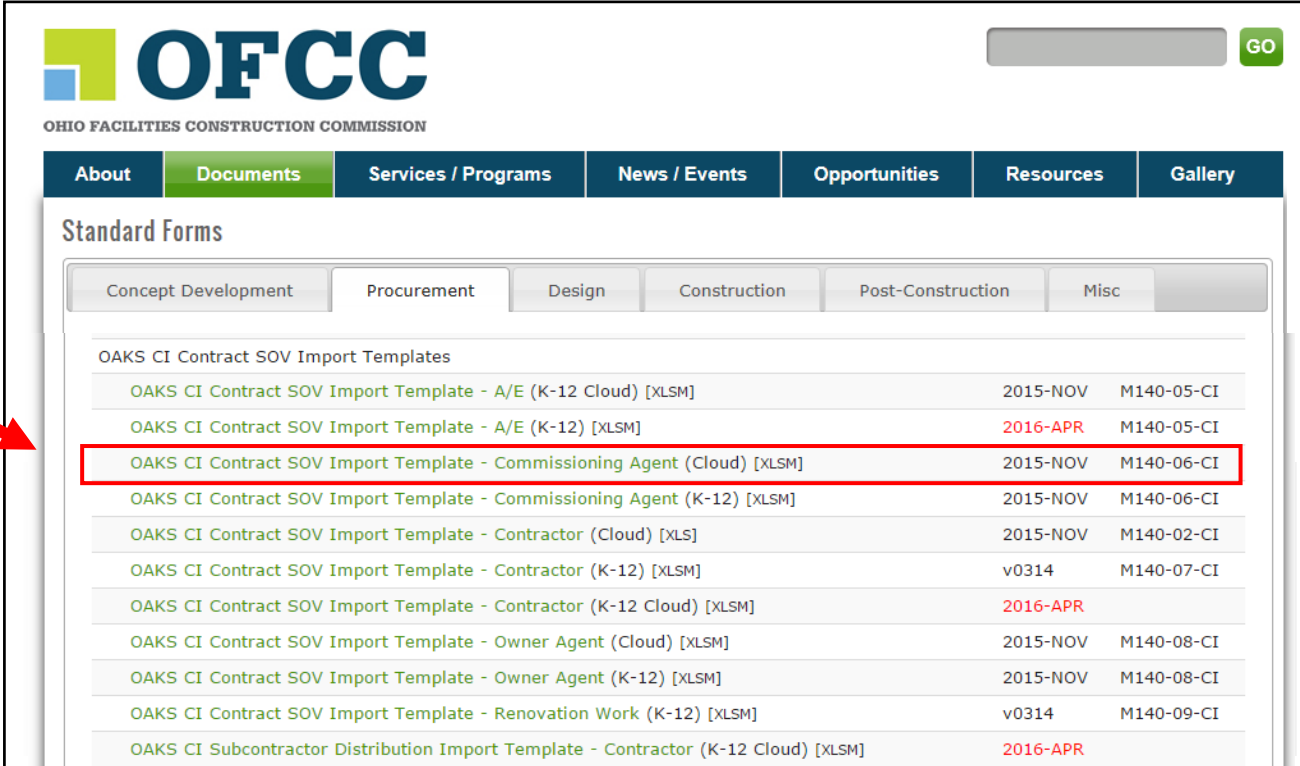
## K12 Cloud

# 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 Commissioning Agent 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



The screenshot shows the OFCC (Ohio Facilities Construction Commission) website. The navigation menu includes 'About', 'Documents', 'Services / Programs', 'News / Events', 'Opportunities', 'Resources', and 'Gallery'. The 'Documents' tab is active, and the 'Standard Forms' section is displayed. Under the 'Standard Forms' section, the 'Procurement' tab is selected. A table lists various templates, with the following row highlighted in red:

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]					
OAKS CI Contract SOV Import Template - A/E (K-12) [XLSM]					
OAKS CI Contract SOV Import Template - Commissioning Agent (Cloud) [XLSM]					
OAKS CI Contract SOV Import Template - Commissioning Agent (K-12) [XLSM]					
OAKS CI Contract SOV Import Template - Contractor (Cloud) [XLS]					
OAKS CI Contract SOV Import Template - Contractor (K-12) [XLSM]					
OAKS CI Contract SOV Import Template - Contractor (K-12 Cloud) [XLSM]					
OAKS CI Contract SOV Import Template - Owner Agent (Cloud) [XLSM]					
OAKS CI Contract SOV Import Template - Owner Agent (K-12) [XLSM]					
OAKS CI Contract SOV Import Template - Renovation Work (K-12) [XLSM]					
OAKS CI Subcontractor Distribution Import Template - Contractor (K-12 Cloud) [XLSM]					

# 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 Lf	Percent	EDGE Certified Prime Contractor?	Associated Building	Notes
			\$0.00					
Cx-BS-00	Cx Basic Services							
Cx-BS-PV	Cx Program Verification Services	<Building Name> Schematic	\$0.00		0			Building Fee
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Eco Charrette	\$0.00		0			\$ -
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Design Drawing	\$0.00		0			6
Cx-BS-DD	Cx Design Development Services	<Building Name> Owners Design Intent Narrative	\$0.00		0			2
Cx-BS-DD	Cx Design Development Services	<Building Name> A/E Basis of Design Review	\$0.00		0			6
Cx-BS-DD	Cx Design Development Services	<Building Name> Energy Modeling Review	\$0.00		0			1
Cx-BS-CD	Cx Construction Docs Services	<Building Name> Construction Drawing	\$0.00		0			1
Cx-BS-CD	Cx Construction Docs Services	<Building Name> Cx Plan	\$0.00		0			2
Cx-BS-CD	Cx Construction Docs Services	<Building Name> LEED Documentation	\$0.00		0			5
Cx-BS-BA	Cx Bid and Award Services							1
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Pre-Functional Testing	\$0.00		0			2
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Functional Testing	\$0.00		0			5
Cx-BS-CA	Cx Construction Admin Services	<Building Name> 1st Report Delivery	\$0.00		0			7
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Seasonal Testing	\$0.00		0			5
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Construction Phase Final Cx Rep	\$0.00		0			5
Cx-BS-CE	Cx Construction Execution							7
Cx-BS-CL	Cx Closeout Services	<Building Name> Re-Cx Plan	\$0.00		0			1
Cx-BS-CL	Cx Closeout Services	<Building Name> Owners Systems Manual	\$0.00		0			5
Cx-BS-CL	Cx Closeout Services	<Building Name> Final Commissioning Report	\$0.00		0			2
Cx-AS-PO	Cx Post Occupancy Evaluation	<Building Name> Trend Report	\$0.00		0			1
Cx-AS-WS	Cx Warranty Services	<Building Name> Correction Period Inspection	\$0.00		0			8
Cx-AS-00	Cx Additional Services							
Cx-AS-DT	Cx Demonstration and Training							
Cx-AS-WS	Cx Warranty Services							
Cx-AS-PO	Cx Post Occupancy Evaluation							
Cx-AS-DT	Cx Other Additional Services							
Cx-RE-00	Cx Reimbursable Expense							
Cx-RE-DT	Cx Other Reimbursable Expense							

# 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 the Microsoft Excel interface with a spreadsheet open. The spreadsheet has columns labeled C through N and rows numbered 1 through 37. The data in the spreadsheet is as follows:

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent	EDGE Certified Prime Contractor?	Associated Building	Notes
Cx-BS-00	Cx Basic Services		\$0.00					
Cx-BS-PV	Cx Program Verification Services	<Building Name> Schematic	\$0.00		0			6
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Eco Charrette	\$0.00		0			2
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Design Drawing	\$0.00		0			6
		<Building Name> Owners Design Intent Narrative	\$0.00		0			1
		<Building Name> A/E Basis of Design Review	\$0.00		0			1
		<Building Name> Energy Modeling Review	\$0.00		0			2
		<Building Name> Construction Drawing	\$0.00		0			5
		<Building Name> Cx Plan	\$0.00		0			1
		<Building Name> LEED Documentation	\$0.00		0			2
		<Building Name> Pre-Functional Testing	\$0.00		0			15
		<Building Name> Functional Testing	\$0.00		0			25
		<Building Name> 1st Report Delivery	\$0.00		0			5
		<Building Name> Seasonal Testing	\$0.00		0			5
		<Building Name> Construction Phase Final Cx Rep	\$0.00		0			7
		<Building Name> Re-Cx Plan	\$0.00		0			1
		<Building Name> Owners Systems Manual	\$0.00		0			5
		<Building Name> Final Commissioning Report	\$0.00		0			2
		<Building Name> Trend Report	\$0.00		0			1
		<Building Name> Correction Period Inspection	\$0.00		0			8
Cx-RE-00	Cx Reimbursable Expense							

The context menu is open over row 11, and the 'Copy' option is highlighted. A red arrow points to the 'Copy' option. The spreadsheet title bar is 'ContractScheduleofValues\_inter'.

# 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

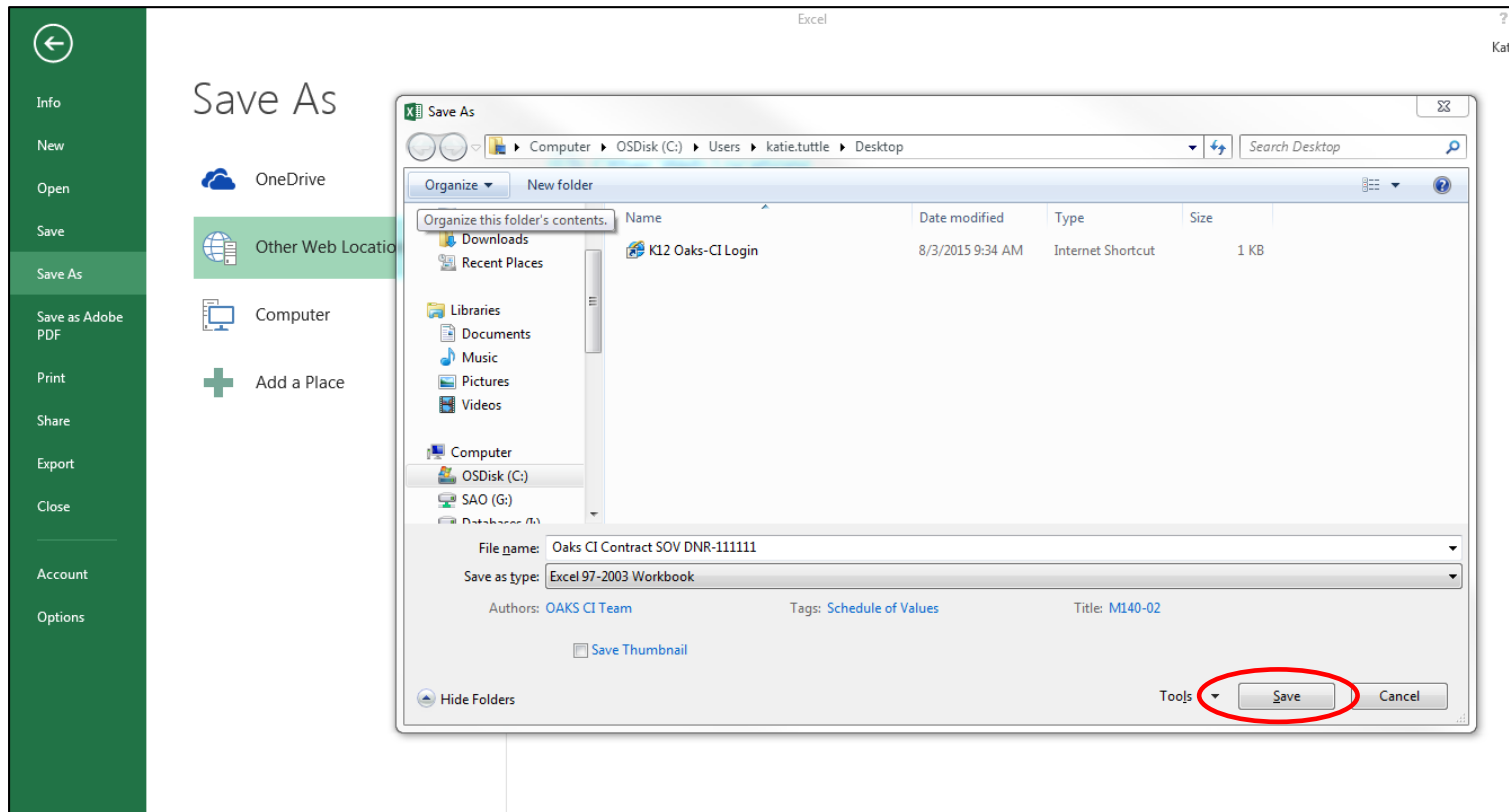
The screenshot shows an Excel spreadsheet with a table containing construction-related data. The table has the following columns: WBS Code, Code Description, Short Description, Amount (\$), Subcontractor/Supplier, and Notes. Row 18 is selected, and a context menu is open over it. The 'Insert Copied Cells'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

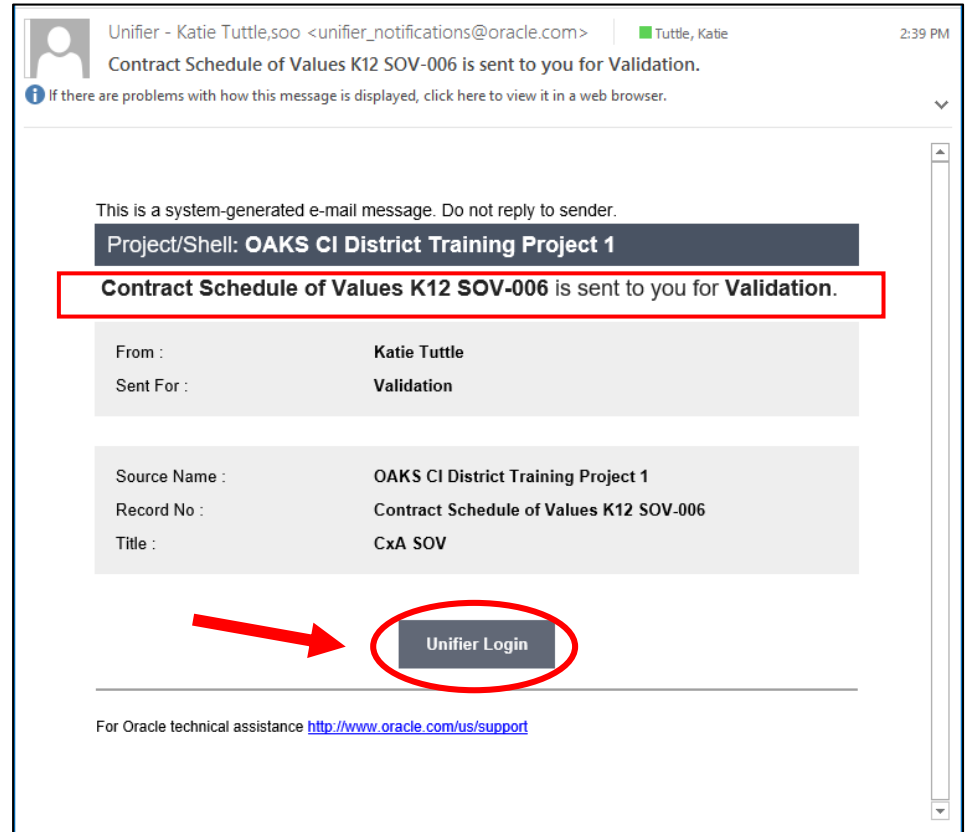
# Save and Email your Spreadsheet

- ▶ 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





# Accept the Task

- ▶ Click Accept Task to begin work on the record

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

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\_id=187019&model=ucsov&project\_id=1084&fromRefLog=&\_urel 110%

File Edit View Actions Help

**Accept Task** Decline Task Cash Flow Review Close Window

### Contract Schedule of Values K12

#### General

Project Number: SFC-080001 Record Number: SOV-006  
Project Name: OAKS CI District Training Project 1 Creator: Katie Tuttle  
Organization Name: OAKS CI District Training Project - 1 Creation Date: 06/23/2017 11:39 AM (UTC-8)  
Facility Name: Status: Pending

#### Task Details

From: [Katie Tuttle](#) Task Due Date: Task Notes (0)  
To: [Commissioning Agent](#) Task Status: Not Started [Workflow Progress](#)  
Cc:  
Sent For: Validation

#### Contracts SOV Details

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI Percent	Subcontractor Supplier
005	Cx-BS-PD	Cx Pre Design Services	pre design	\$175,000.00	0	
004	Cx-BS-CL	Cx Closeout Services	closeout services	\$100,000.00	0	
003	Cx-BS-CE	Cx Construction Equipment	Construction Equipment	\$150,000.00	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 - CxA SOV - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\_id=187019&model=ucsov&project\_id=1084&initiateBP=&bulkautoaccept=&fromRe 110%

File Edit View Actions Help

Workflow Actions Validated [v] [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-006  
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

5 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?
005	Cx-BS-PD	Cx Pre Design Services	pre design	\$175,000.00	0		
004	Cx-BS-CL	Cx Closeout Services	closeout services	\$100,000.00	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](mailto:oaksci@ofcc.ohio.gov)

614.644.2211