



# **GMP Subcontract Distribution**

## **K-12 Cloud**

# Purpose & Process

- ▶ 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.
- ▶ **The Contractor will:**
  - ▶ Locate and Complete the Subcontractor Distribution Spreadsheet
  - ▶ Email the Spreadsheet to the PC
  - ▶ Receive and Review the GMP Subcontractor Distribution record in OAKS CI (as a contract modification)
- ▶ **Workflow**

OAKS CI Record Created by: **Project Coordinator** → Sent to: **Contractor Review** → Sent to: **PC Update (if necessary)** → Sent to: **A/E Review** → Sent to: **PM Approval**

# 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 (K-12 Cloud) [XLSM]	2016-JUL	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]	2016-MAY	M140-07-CI
OAKS CI Contract SOV Import Template - Contractor (K-12 Cloud) [XLSM]	2016-APR	M140-02-CI
OAKS CI Contract SOV Import Template - Owner Agent (K-12 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]	2016-MAY	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	<b>WBS Code</b>	<b>Code Description</b>	<b>Short Description</b>	<b>Amount (\$)</b>	<b>Subcontractor/Supplier</b>	<b>Notes</b>
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
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 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
			\$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				
			\$34.00		

New line  
will appear  
above here

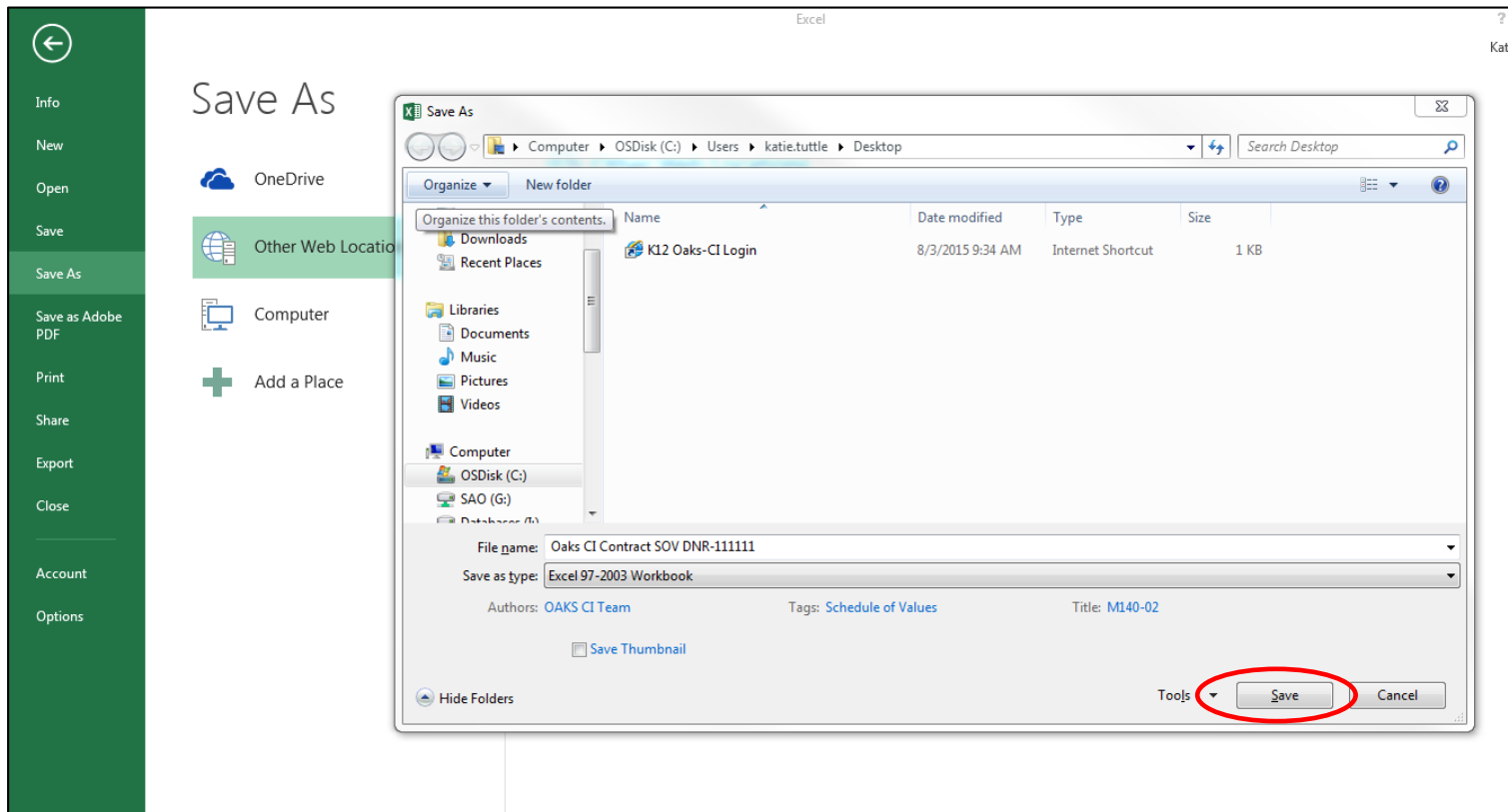
# Enter Line Items

- ▶ 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	<b>WBS Code</b>	<b>Code Description</b>	<b>Short Description</b>	<b>Amount (\$)</b>	<b>Subcontractor/Supplier</b>	<b>Notes</b>
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-05M	Metals Matl				
32	CE-FC-05L	Metals Labr				
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

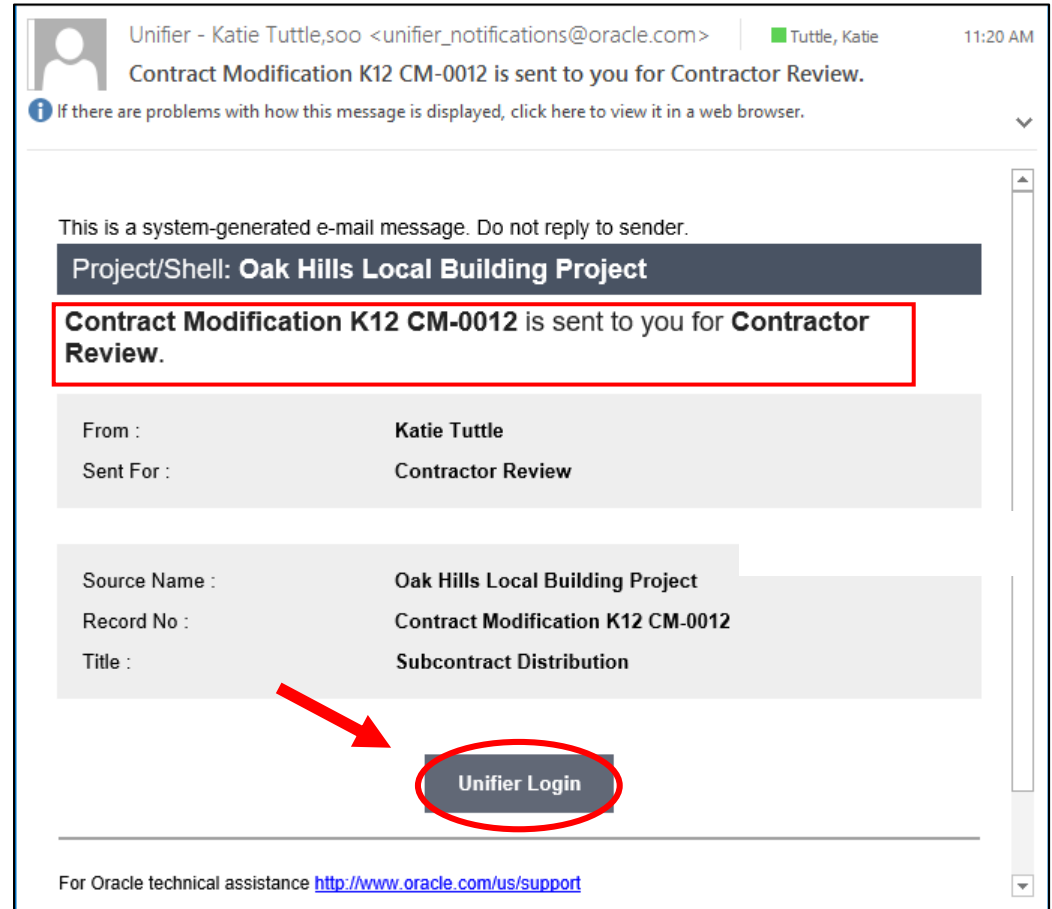
- ▶ Step 5:
  - ▶ Name and Save the Spreadsheet
  - ▶ Email the Spreadsheet to you're A/E, Project Manager, and Project Coordinator for review





# Task Notification

- ▶ Once the Subcontract Distribution record is created by the Project Coordinator you will receive an email notification that you have a Task pending
- ▶ Click on the link to access your Task



# Accept the Task

- ▶ Click Accept Task to begin reviewing the record

Contract Modification K12 - Subcontract Distribution - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\_id=186881&parent\_id=0&viewOnly=0&project\_id=1086&\_\_uref=uul

File Edit View Actions Help

Accept Task Decline Task SOV Review Close Window

### Contract Modification K12

#### General

General

Project Number: SFC-080001.01 Record Number: CM-0012

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

Organization Name: Creation Date: 06/19/2017 08:19 AM (UTC-8)

Facility Name: Status: Pending

Title: Subcontract Distribution

#### Task Details

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

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

Cc: Sent For: Contractor Review

#### Line Item List

Current View: All Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Sup
007	0	CE-FC-03M	Concrete Matl	Concrete material	\$50,000.00	0	Bob's Concrete
006	0	CE-FC-03L	Concrete Labr	Concrete labor	\$50,000.00	0	Bob's Concrete
005	0	CE-FS-22M	Plumbing Matl	Plumbing material	\$50,000.00	0	Katie's Plumbing
004	0	CE-FS-22L	Plumbing Labr	Plumbing labor	\$50,000.00	0	Katie's Plumbing
003	0	CE-FS-22M	Manufacturing Equipment M	Manufacturing matl	\$50,000.00	0	Harco Manufactu

Grid Find Show Filtered Total Amount Total Amount: \$0.00

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

# Review the Task

- ▶ Review the GMP Subcontractor Distribution record to ensure all information is correct
- ▶ Choose Workflow Action
- ▶ Click Send



The screenshot displays a web application interface for reviewing a task. The browser window title is "Contract Modification K12 - Subcontract Distribution - Project No. SFC-080001.01 - Mozilla Firefox". The URL is "https://ohio-dev-unifier.oradeindustry.com/bp/process/task/open?task\_id=186881&model=ucmk&project\_id=1086&initiateBP=&bulkautoac".

The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar, there is a toolbar with various icons and labels: "Workflow Actions", "Accept" (selected), "Send", "Save", "Spelling..", "Add Attachment", "Discussion", "SOV", "Review", and "Close Window".

The main content area is titled "Contract Modification K12" and contains a "General" section with the following details:

- Project Number: SFC-080001.01
- Record Number: CM-0012
- Project Name: Oak Hills Local Building Project
- Creator: Katie Tuttle
- Organization Name: [Empty]
- Creation Date: 06/19/2017 08:19 AM (UTC-8)

Below the "General" section is the "Action Details" section, which includes a "Send For" field set to "AE Review" and a "Task Notes" section.

The "Line Item List" section shows a table with 7 items. The table has columns for "No.", "Reference", "WBS Code", "Code Name", "Short Description", "Amount", "LFI Percent", and "Subcontractor/Sup".

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Sup
007	0	CE-FC-03M	Concrete Matl	Concrete material	\$50,000.00	0	Bob's Concrete
006	0	CE-FC-03L	Concrete Labr	Concrete labor	\$50,000.00	0	Bob's Concrete
005	0	CE-FS-22M	Plumbing Matl	Plumbing material	\$50,000.00	0	Katie's Plumbing
004	0	CE-FS-22L	Plumbing Labr	Plumbing labor	\$50,000.00	0	Katie's Plumbing

At the bottom of the interface, there is a toolbar with icons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". There is also a "Show Filtered Total Amount" checkbox and a "Total Amount" field showing "\$0.00".

At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211