

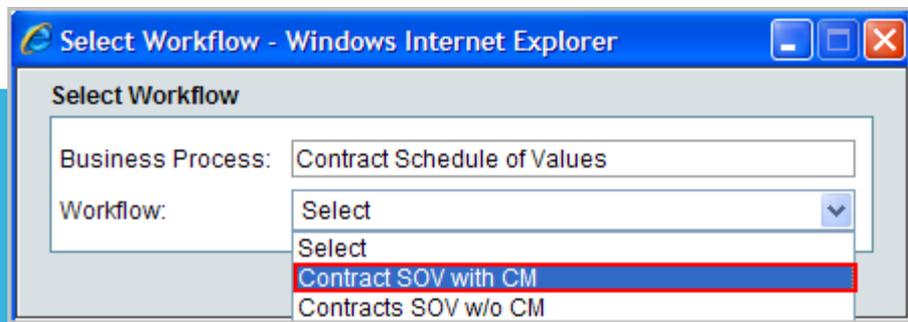
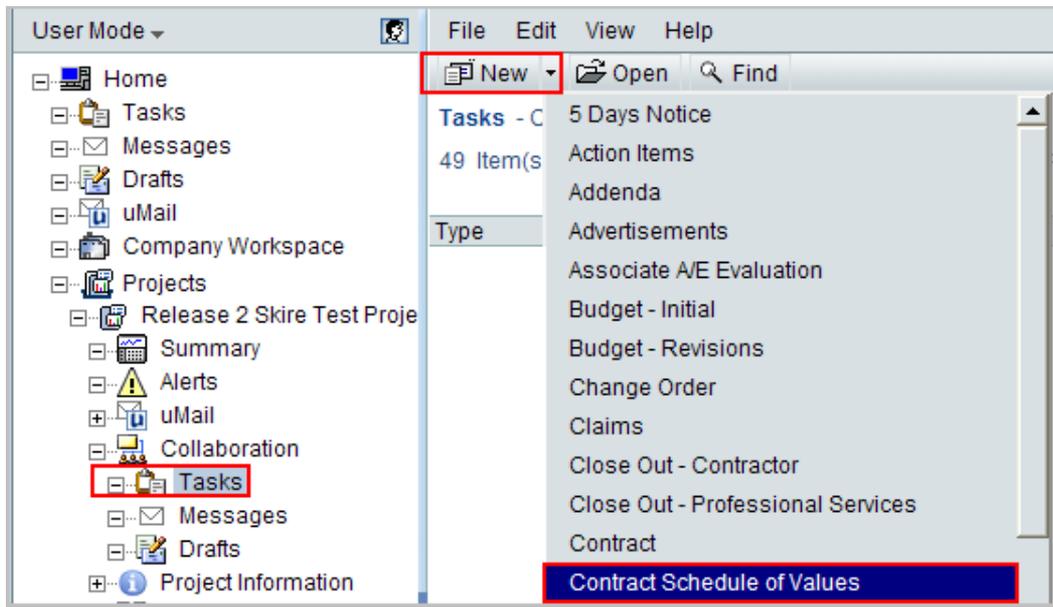
# Contract Schedule of Values

# CREATE NEW CONTRACT SOV RECORD

Open a new Contract SOV record.

Select the appropriate work flow if asked

Click OK.



# ENTER INFORMATION INTO THE RECORD

Each section of the record requires entry of relevant information.

- Upper form
  - General
  - Contract Information
  - Notes
- Contracts SOV Details
  - Line Items
- Add Attachment(s), if applicable

The screenshot shows a web browser window with the title 'Contract Schedule of Values - Contract SOV with CM 1 - Project No. TEST-00000001 - Windows Internet Explorer'. The browser's menu bar includes 'File', 'Edit', 'View', 'Actions', and 'Help'. A toolbar contains icons for 'Send', 'Save', 'Spelling...', 'Add LI', 'Import LI', 'Remove LI', 'Copy LI', 'Add Attachment', and 'Discussion'. The main content area is titled 'Contract Schedule of Values' and is divided into several sections:

- General**: Fields for Organization (Central Ohio Technical College), Project Number (TEST-00000001), Project Name (Release 2 Skire Test Project), Project Location (Columbus Campus), Title (Contract SOV with CM 1), Record Number, Creator (Ohio Admin), Creation Date, Status, and Fee Title (SATUAT Release 2).
- Contract Information**: Fields for Contract No. (7894512), Trade (Other), EDGE Certified Sub? (Yes), Contractor Name (EDGE Certified Vendor), Total Contract Amount (100,000.00), Line Item Total (\$) (100,000.00), and Difference (\$) (0.00).
- Notes**: A large text area for entering notes.

At the bottom, there are tabs for 'Action Details', 'Contracts SOV Details', 'Attachments (0)', 'Linked Records (0)', 'General Comments', and 'Linked uMails (0)'.

# COMPLETE THE CONTRACT INFORMATION BLOCK

- Select a Contract Number
  - Balance of the information will be auto-populated
    - Note: the recommended Total Contract Amount is provided
  - Line Item Total field and the Difference (\$) field assist in confirming the Schedule of Values matching the Total Contract Amount field
  - Difference (\$) must equal 0.00 to advance to next step

Contract Information	
Contract No.: 7894512	Contractor Name: EDGE Certified Vendor
Trade: Other	Total Contract Amount: 100,000.00
EDGE Certified Sub?: Yes	Line Item Total (\$): 0.00
	Difference (\$): 100,000.00

# ADD LINE ITEMS

## Method Two: Spreadsheet

- Utilizes an externally produced excel spreadsheet that is imported into the SOV record
- Recommended for larger projects with numerous work requirements and SOV line items

## METHOD TWO: SPREADSHEET

Step 1: Open Excel spreadsheet, located on the OFCC Web Site in the Documents

Step 2: **Check your Excel Macro security settings and ensure they are set to LOW**

# ENTER CONTRACT SOV LINE ITEMS

## Step 3: Enter Contract SOV line items.

	C	D	E	F	G	H
1	Import Business Process Records					
2	Note: Do not change column structure. To 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				



# ENTER CONTRACT SOV LINE ITEMS

## Step 3: Name and save the spreadsheet :

	C	D	E	F	G	H
1	Import Business Process Records					
2	Note: Do not change column structure. Top add new lines, copy and paste the entire line to be repeated					
3						
4	<b>WBS Code</b>	<b>Code Description</b>			<b>contractor/Supplier</b>	<b>Notes</b>
5						
6						
7	CE-00-00	Construction Execut				
8	CE-01-00	General Requiremer				
9	CE-01-BE	General Requiremer				
10	CE-01-IN	CE Insurance				
11	CE-01-SB	CE Surety Bonds				
12	CE-01-SC	CE Scheduling Serv				
13	CE-01-PF	CE Partnering Facili				
14	CE-01-MBL	CE Mobilization Lab				
15	CE-01-MBM	CE Mobilization Matl				
16	CE-01-TFL	CE Temporary Facil				
17	CE-01-TFM	CE Temporary Facil				
18	CE-01-LCL	CE Lead Contractor				
19	CE-01-LCM	CE Lead Contractor				
20	CE-01-CLL	CE Closeout Labor				
21	CE-01-CLM	CE Closeout Materie				
22	CE-01-OTL	CE General Conditio				
23	CE-01-OTM	CE General Conditio				
24	CE-FC-00	Facility Construction				
25	CE-FC-BE	Facility Construction				
26	CE-FC-02L	Existing Conditions				

Prepare interface file

My Documents

- 20090811-Oaks CI Training(736610222)
- 20090921-WebEx Consultant Training(733850798)
- 20090930-Test(733117923)
- 20091015-OWNERS FINANCIAL(732240233)
- 20091019-2nd half of 10\_19(733071831)
- 20091203-Introduction to OAKS CI(734869839)
- HKOVT51B
- My Documents
- My Music
- My Pictures
- My Shapes
- My Videos
- Outlook
- WebEx
- HOOKS - ELM OAKS Security Request Form.xlsx

File name: OAKS CI Contract SOV Indian river1.15.xls

Save as type: Excel Workbook (\*.xlsx)

Save Cancel

# ENTER CONTRACT SOV LINE ITEMS

## Step 4: Click “Prepare Interface File”

OAKS CI Contract SOV Template.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer

Clipboard Font Alignment Number Styles

Normal Bad Good Check Cell Explanatory ... Followed

G37

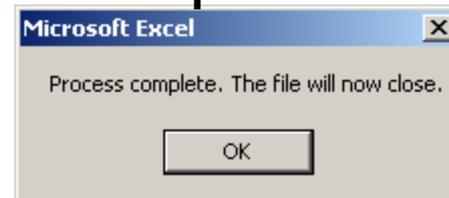
WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
			\$9,500.00		
CE-00-00	Construction Execution Summary				
CE-01-00	General Requirements				
CE-01-BE	General Requirements Budget				
CE-01-IN	CE Insurance				
CE-01-SB	CE Surety Bonds				
CE-01-SC	CE Scheduling Services				
CE-01-PF	CE Partnering Facilitation				
CE-01-MBL	CE Mobilization Labor				
CE-01-MBM	CE Mobilization Matl				
CE-01-TFL	CE Temporary Facilities Labor				
CE-01-TFM	CE Temporary Facilities Matl				
CE-01-LCL	CE Lead Contractor Services Labor				
CE-01-LCM	CE Lead Contractor Services Matl				
CE-01-CLL	CE Closeout Labor				
CE-01-CLM	CE Closeout Material				

**Click, Prepare Interface File**

**BEFORE THIS STEP MAKE SURE YOU HAVE REVIEWED THIS FORM WITH A/E AND YOUR SAO PM**

## ENTER CONTRACT SOV LINE ITEMS

Once you click the Prepare Interface button, a box will appear indicating that the process is complete, click OK. This portion is now complete



# IMPORT SPREADSHEET

Open Contract SOV record  
And complete General form  
area

The screenshot shows a web browser window with the URL [https://oaksci.training.ohio.gov/?wftemplate\\_id=253&module\\_name=ucsov&csvimport=false&project\\_i](https://oaksci.training.ohio.gov/?wftemplate_id=253&module_name=ucsov&csvimport=false&project_i). The browser's menu bar includes File, Edit, View, Actions, and Help. The page title is "Contract Schedule of Values". The "General" tab is selected and circled. The form contains the following fields:

General	
Organization:	<input type="text"/>
Project Number:	<input type="text" value="OCI-080001"/>
Project Name:	<input type="text" value="OAKS CI Training 1"/>
Project Location:	<input type="text" value="Surface Road"/>
Title:	<input type="text" value="Test"/> *
Record Number:	<input type="text"/>
Creator:	<a href="#">Shauna Hooks</a>
Creation Date:	<input type="text"/>
Status:	<input type="text"/>
Fee Title:	<input type="text" value="SAO Standard Fee 1"/>

Contract Information	
Contract No.:	<input type="text" value="OCI-080001-03"/> <input type="button" value="Select..."/> *
Contractor Name:	<input type="text" value="OAKS Plumbing"/>
Trade:	<input type="text" value="Plumbing"/>
EDGE Certified Prime?:	<input type="text" value="Yes"/>
Total Contract Amount:	<input type="text" value="750,000.00"/>
Line Item Total (\$):	<input type="text" value="0.00"/>
Difference (\$):	<input type="text" value="750,000.00"/>

Notes:

Action Details

Contracts SOV Details

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

# IMPORT SPREADSHEET

Click Contract SOV Details tab

Click Import LI

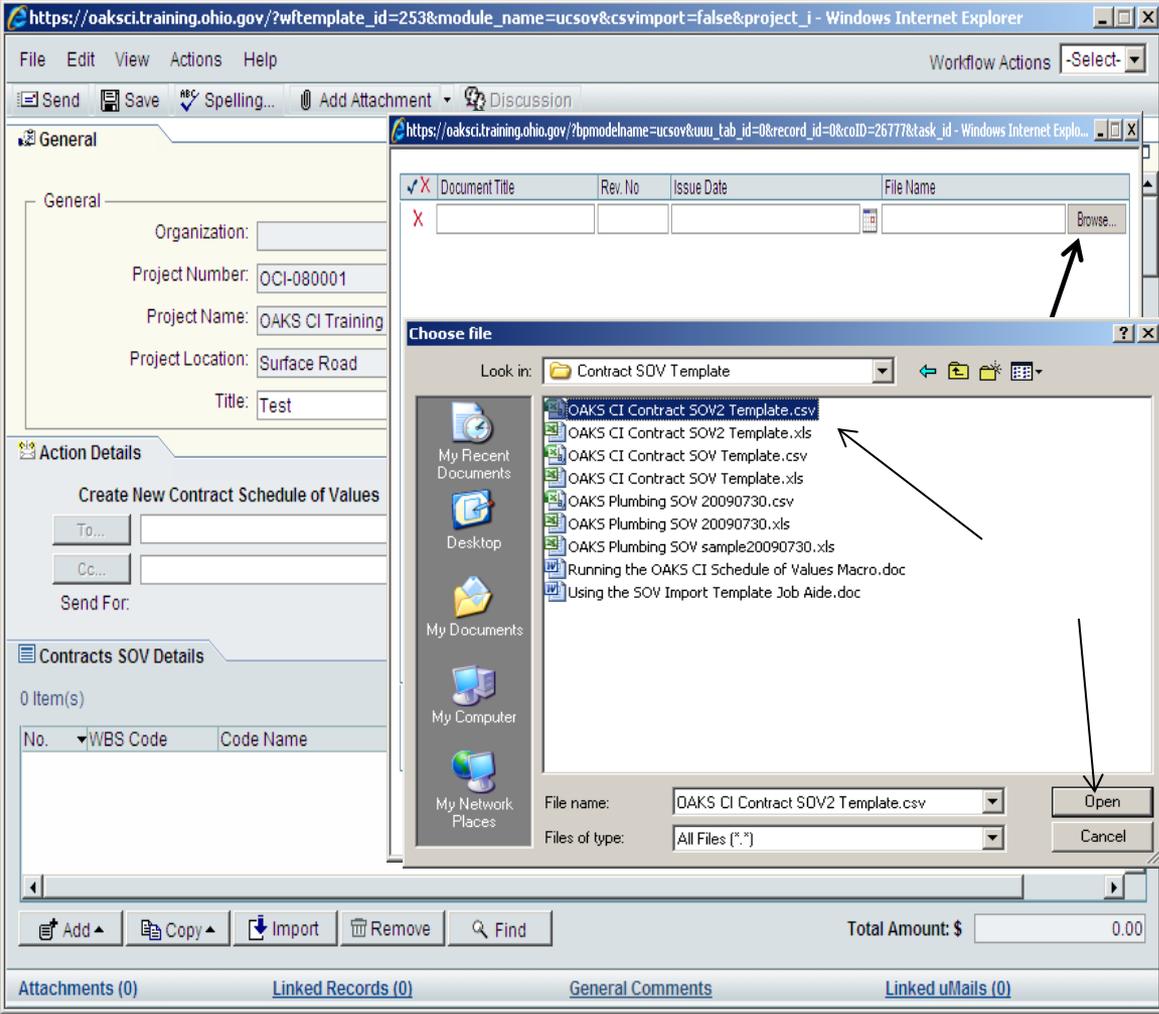


# IMPORT SPREADSHEET

Browse to .csv version of the xls file you previously saved

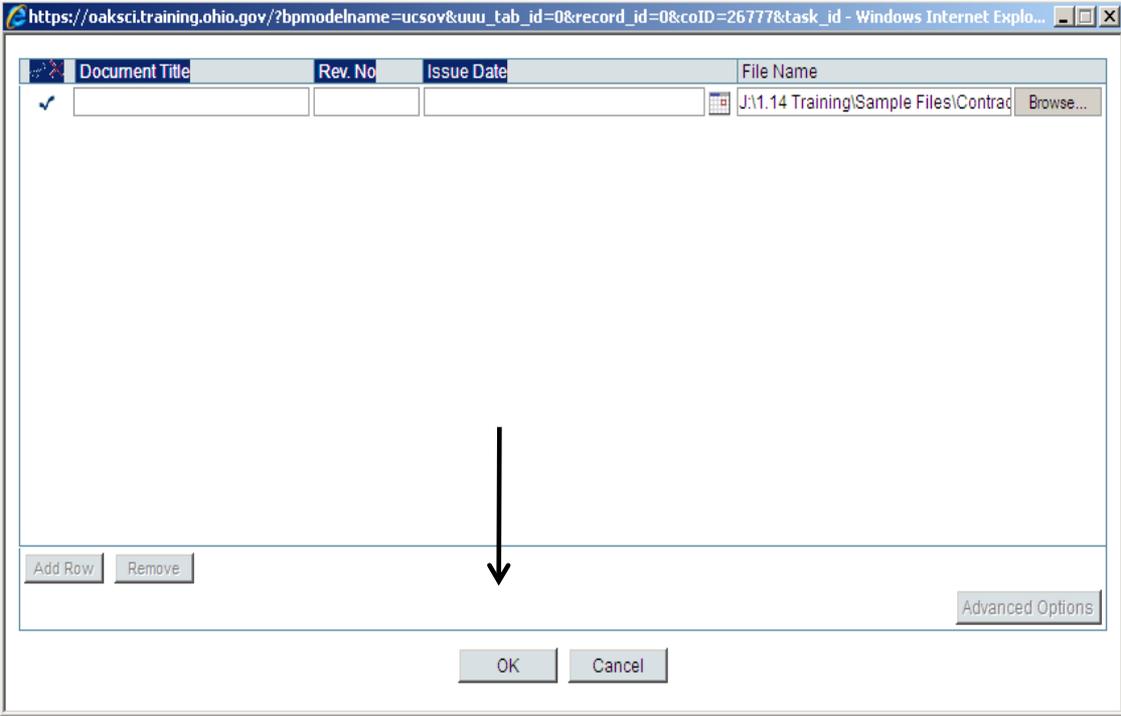
Highlight document

Click open



# IMPORT SPREADSHEET

Click Ok



# REVIEW IMPORTED LINE ITEMS

When all SOV Line Item entries are imported:

- Review the Schedule of Values (SOV) information summary in the Contracts SOV Detail pane
- Verify that the total value in the Contract Amount Detail Block and the total amount in the WBS Detail pane are equal and the Difference(\$)  
value is zero (0.00)

# REVIEW IMPORTED LINE ITEMS

Contract Schedule of Values

Record Number: CSOV-0002  
 Creator: Fred Holcomb  
 Creation Date: 04/04/2009 09:17 AM Local (GMT-5)  
 Status: Approved  
 Fee Title: SAO Standard Fee 1

Contractor Name: Sands Decker Ltd.

Total Contract Amount: 1,011,465.00  
 Line Item Total (\$): 1,011,465.00  
 Difference (\$): 0.00

No.	WBS Code	Code Name	Short Description	Amount (\$)	Subcontractor/Supplier	EDGE Cer
147	CE-FS-23M	Heating Ventilating and AC	EF-1	2,000.00	Approved Componente & Sy	Yes
146	CE-FS-26M	Electrical Matl	Electrical material	50,000.00		
145	CE-FS-26L	Electrical Labr	Electrical Labor	100,000.00		
144	CE-FS-23M	Heating Ventilating and AC	Air & Water Balance	1,000.00		
143	CE-FS-23M	Heating Ventilating and AC	Temperature Controls GYM	5,600.00		
142	CE-FS-23M	Heating Ventilating and AC	Temperature Controls HS	6,600.00		
141	CE-FS-23M	Heating Ventilating and AC	Temperature Controls ES	15,600.00		
140	CE-FS-23M	Heating Ventilating and AC	Temperature Controls Submittal	200.00		
<b>Total Amount: \$</b>				<b>1,011,465.00</b>		

# COMPLETE CONTRACT SOV

Click Workflow Actions

- Select Submit

Click Send

Click OK

The record will forward to the Associate



# Help Desk

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