



GMP Amendment & Subcontract Distribution

GMP Amendment

DocuSign Enabled BP

- ▶ The Change Order Business Process now has three workflows that utilize DocuSign, which enables electronic signature of change orders.
 - ▶ **GMP Amendment**
 - ▶ Proposal Request
 - ▶ Request for Change Order
- ▶ Users who are sent a Change Order for signature via DocuSign do not need a separate account to sign the document.
- ▶ For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website or via this link:
<http://ofcc.ohio.gov/Resources/OAKSCI/AgencyHigherEdTraining.aspx#132599-agencyhigher-ed-all-users>

GMP Amendment Purpose

- ▶ GMP Amendment represents the total maximum amount to be paid by the owner. It includes the cost of all the work, general conditions, contingency, and the fee payable to the CM at Risk or Design Build team.

- ▶ Workflow

Created by: **CMR/DB** → Sent to: **PM Review** → Sent to: **CMR/DB Update (if necessary)** → Sent to: **PC Validation and Document Prep** → Sent to: **Vendor Signature via DocuSign**

GMP Amendment Creation

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Change Order
 - ▶ Click New
 - ▶ Select GMP Amendment Workflow and Click OK

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page title is "ORACLE PRIMAVERA UNIFIER" with a last login time of "09/29/2015 07:04 AM". The navigation pane on the left shows a tree structure with "Logs" selected and circled in red. A red arrow points from the "Logs" folder to the "Change Order" folder, which is also circled in red. The main content area displays a table of Change Order items.

CO No.	CO Type
01	Request for Change O
001	Request for Change O
1	Request for Change O
1234	Change Directive
j	Request for Change O
6	Request for Change O
5	
3	
123	
1	Proposal Request
	Proposal Request

The screenshot shows a "Select Workflow" dialog box in a Windows Internet Explorer window. The "Business Process" field is set to "Change Order". The "Workflow" dropdown menu is open, showing a list of options: "Select", "Select", "GMP Amendment SAO" (highlighted in blue), "GMP Subcontract Distribution", and "SAO Change Directive". A red arrow from the text "Click OK" in the previous slide points to this dialog box.

GMP Amendment

- ▶ Select the Contract Reference
- ▶ Once the contract is selected, many fields will auto populate.
- ▶ Complete all open fields, fields marked with a red * are mandatory

The screenshot displays a web application window for creating a new change order. The title bar reads "Create New Change Order - Project No. SAT-120002 - Windows Internet Explorer". The application has a menu bar (File, Edit, View, Actions, Help) and a toolbar with options like Send, Save, Spelling, Add Attachment, Discussion, SOV, and Close Window. The main content area is titled "Change Order" and is divided into several sections:

- General:** Contains fields for Organization (Department of Administrative Services), Project Number (SAT-120002), Project Name (SAT 7 CM-R Test Project), Project Location (GSD Surface Rd), Title (GMP Amendment), Contract Reference (SAT-120002-01-01), Change Order Type (GMP Amendment), Change Order No., Record Number, Creator (Shauna Hooks), Creation Date, Status, Trade (General Trades), Contractor Name (DM Construction Services), EDGE Certified Prime? (No), and Fee Title (SAO Standard Fee 1). A red arrow points to a "Select..." button next to the Contract Reference field, which is circled in red.
- GMP Amendment Contract Sum:** Contains fields for General Conditions Cost % Cap (3.3), Contingency % Cap (1.5), Construction Design Services Fee % Cap, and CM/DB Fee % Cap (3). It also shows "Cost of the Work (\$)" as 0.00.
- Action Details:** Contains fields for Construction Stage, Construction Personnel Costs (\$), General Conditions Costs (\$), Subcontracted Work, Construction Personnel Cost Cap (\$) (329,363.00), and General Conditions Costs Cap (\$) (0.00). Fields marked with a red asterisk (*) are mandatory.

At the bottom of the window, there are tabs for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

GMP Amendment

- ▶ Click on the 'Line Item List' Tab

Change Order - GMP #1 - Project No. SAT-120002 - Windows Internet Explorer

File Edit View Actions Help

Accept Task: Decline Task: [S] [GO] Close Window

General **Change Order**

GMP Amendment Contract Sum

General Conditions Cost % Cap:	3.3	Contingency % Cap:	1.5
Construction Design Services Fee % Cap:	0	CM/DB Fee % Cap:	3

Cost of the Work (\$):	7,394,231.50	Construction Stage Personnel Costs (\$):	329,363.00	Construction Personnel Cost Cap (\$):	329,363.00
		General Conditions Costs (\$):	243,831.00	General Conditions Costs Cap (\$):	244,009.64
		Subcontracted Work (\$):	6,450,000.00		
		Self-Performed Work (\$):	371,037.50		

Contingency (\$):	110,913.47	Contingency Cap (\$):	110,913.47
Construction Design Services Fee (\$):	0.00	Construction Design Services Fee Cap (\$):	0.00
CM/DB Fee (\$):	217,200.00	CM/DB Fee Cap (\$):	221,826.95

Contract Sum (\$):	7,722,344.97	Total Amount (\$):	7,722,344.97
		Line Item Total (\$):	7,722,344.97
		Difference (\$):	0.00

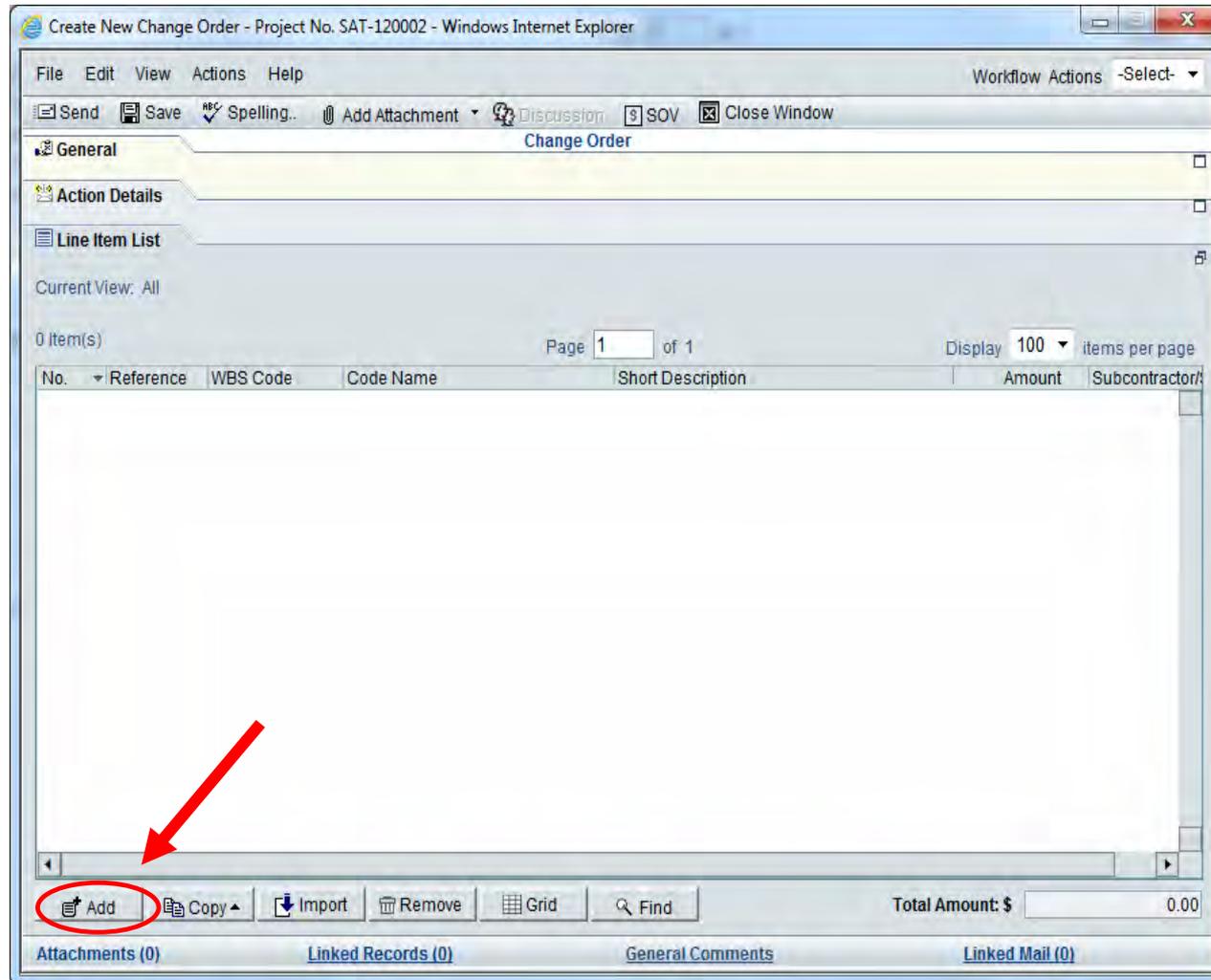
Task Details

Line Item List

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

GMP Amendment

- ▶ Click Add



GMP Amendment

- ▶ Click the arrow next to WBS code
- ▶ Choose the appropriate WBS code from the list and click Select

Line Item - Windows Internet Explorer

Spelling... | Attach | Delete Line Item

Change Order Line Item:

General

Reference:

WBS Code:

Code Name:

Short Description:

Amount (\$):

EDGE Certified Prime Contractor?:

Subcontractor/Supplier:

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

Attachments (0) [Linked Records \(0\)](#)

WBS Picker - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_code?

Select Expand Collapse Find Close Window

Select WBS Code

	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
56	AE-00-00	Professional Design Summary
89	RF-00-00	Regulatory Fees Summary
98	CM-00-00	Construction Management Summary
126	CE-00-00	Construction Execution Summary
214	Cx-00-00	Commissioning Summary
236	FE-00-00	F F and E Summary
247	AA-00-00	Acquisition of Art Summary
251	PM-00-00	Project Management Summary
274	ES-00-00	Energy Services Summary
313	ID-00-00	Interior Design Summary
340	CMR-00-00	CM at Risk Summary
358	DB-00-00	Design Build Summary
359	DB-DB-00	DB Services Generay
362	DB-PSC-00	DB Precon Stage Comp Summary
363	DB-PSC-BE	DB Precon Stage Comp Budget
364	DB-PSC-OMS	DB Organizational Meeting Fee
365	DB-PSC-PVS	DB Program Verification Fee
366	DB-PSC-SDS	DB Schematic Design Fee
367	DB-PSC-DDS	DB Design Development Fee
368	DB-PSC-GMS	DB GMP Amendment Fee
369	DB-PSC-CDS	DB Construction Documents Fee
370	DB-PSC-PXS	DB Precon Personnel Expense
371	DB-PSC-RES	DB Precon Reimbursable Expenses
372	DB-PDF-00	DB Precon Design Fee Summary
380	DB-PSC-00	DB Const Stage Comp Summary

GMP Amendment

- ▶ Complete all fields marked with a red * then click OK

The screenshot shows a web browser window titled "Line Item - Google Chrome" with the URL <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=forr>. The page content is titled "Change Order Line Item:" and contains a "General" section with the following fields:

- Reference:
- WBS Code: *
- Code Name:
- Short Description: *
- Amount (\$): *
- EDGE Certified Prime Contractor?:
- Subcontractor/Supplier:
- Subcontractor/Supplier:
- EDGE Certified Sub?:

Below these fields is a "Notes:" section with a text area. At the bottom of the form, there are two buttons: "OK" (circled in red) and "Cancel".

GMP Amendment

▶ Sample of Completed Lower Form

Change Order - Thomas & Marker GMP Amendment - Project No. DOT-130006 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=8835&model=uco&fromcostlog=1&project_id=15

File Edit View Actions Help

Save Spelling.. Add Attachment SOV Close Window

Change Order

General

Task Details

Line Item List

Current View: All Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontr
024	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 22.0 - Plumbing	\$665,000.00	
023	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 21.0 - Fire Suppression	\$71,980.00	
022	0	CE-CE-SW	Subcontractor Work Allowance	Pre-Engineered Buildings / Structures	\$913,225.00	
021	0	CE-CE-SW	Subcontractor Work Allowance	Window Treatments	\$1,975.00	
020	0	CE-CE-SW	Subcontractor Work Allowance	Specialty Equipment	\$192,350.00	
019	0	CE-CE-SW	Subcontractor Work Allowance	Division 10 Specialties	\$41,650.00	
018	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 9.2 - Painting	\$48,750.00	
017	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 9.1 - Flooring	\$13,329.00	
016	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 9.0 Drywall Framing	\$142,587.00	
015	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 8.0 Overhead Doors	\$83,900.00	
014	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 6.0 - Openings	\$124,323.00	
013	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 7.0 - Thermal & Moisture Protecti	\$37,366.00	
012	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 6.0 - Rough Carpentry	\$55,526.00	
011	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 5.0 - Misc Steel	\$1,900.00	
010	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 4.0 - Masonry	\$52,224.00	
009	0	CE-CE-SW	Subcontractor Work Allowance	Bid Package 3.0 - Concrete	\$1,246,479.00	
008	0	DB-CSC-CFS	DB Construction Stage Fee	Constructon Stage Fee	\$247,975.00	
007	0	DB-CSC-CDF	DB Construction Stage Design Fee	Construction Stage Design Fee	\$19,370.00	Sands
006	0	DB-CSC-CDF	DB Construction Stage Design Fee	Construction Stage Design Fee	\$72,508.00	
005	0	DB-CSC-PXS	DB Const Stage Personnel Expense	Construction State Personnel Expense	\$186,800.00	
004	0	CE-CE-SW	Subcontractor Work Allowance	Soils Allowance	\$30,000.00	
002	0	CE-01-BE	General Conditions Budget	General Conditons	\$218,800.00	
001	0	OR-CF-DB	Design-Build Contingency	Contingency	\$150,546.00	

Grid Find

Total Amount: \$7,336,404.00

Attachments (7) Linked Records (0) General Comments (0) Linked Mail (0)

GMP Amendment

- ▶ Once the record is complete, go to the upper right hand corner of your form and click the arrow next to Workflow Action, choose Submit
- ▶ Click Send

Workflow Actions: Submit

Submit

Send

Save

Spelling..

Add Attachment

Discussion

SOV

Close Window

Change Order

General

Organization: Department of Administrative Services

Record Number:

Project Number: OCI-080001

Creator: Katie Tuttle

Project Name: OAKS CI Training 1

Creation Date:

Project Location: Surface Road

Status:

Action Details

Submit

To...: Barbara Taylor, Consultant Student1, Consultant

Cc...

Send For: Associate Review

Task Notes:

Line Item List

Current View: All

1 Item(s)

Page 1 of 1

Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontr
001	0	DB-PSC-OMS	DB Organizational Meeting Fee	Organizational Meeting Fee	\$500.00	

Total Amount: \$500.00

Attachments (0)

Linked Records (0)

General Comments

Linked Mail (0)

GMP Subcontract Distribution

GMP Subcontractor Distribution

- ▶ 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.

- ▶ Workflow

Created by: **CMR/DB** → Sent to: **PC Validation** → Sent to:
PM Approval

Navigate to Spreadsheet

- ▶ Step 1: Open Excel spreadsheet from website:
<http://ofcc.ohio.gov>
 - ▶ Click- Documents Tab
 - ▶ Click- Standard Forms
 - ▶ Click- Procurement Tab
 - ▶ Click- Oaks CI Contract SOV Import Template- Contractor (Cloud)(Excel)

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

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Standard Forms

Concept Development Procurement Design Construction Post-Construction Misc

Procurement Forms
(Note: The Procurement Agreements have moved to the Agreements and Standard Requirements block below).
Page last updated: December 24, 2015

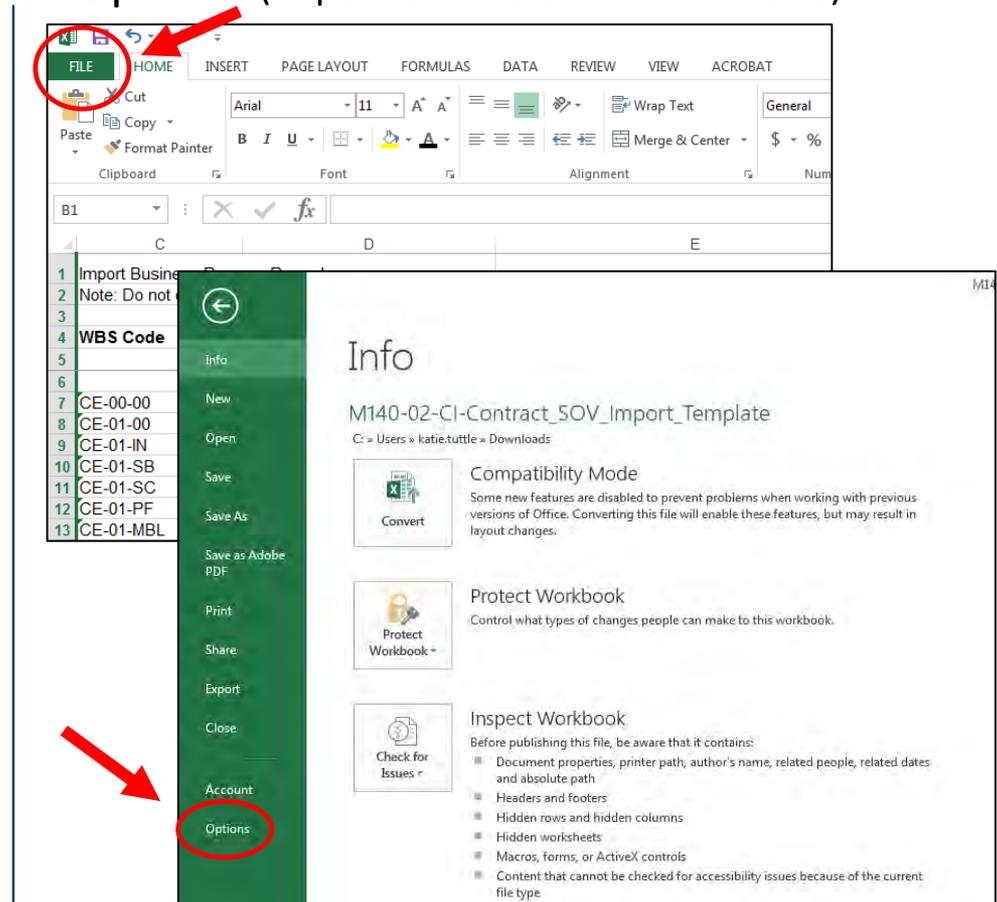
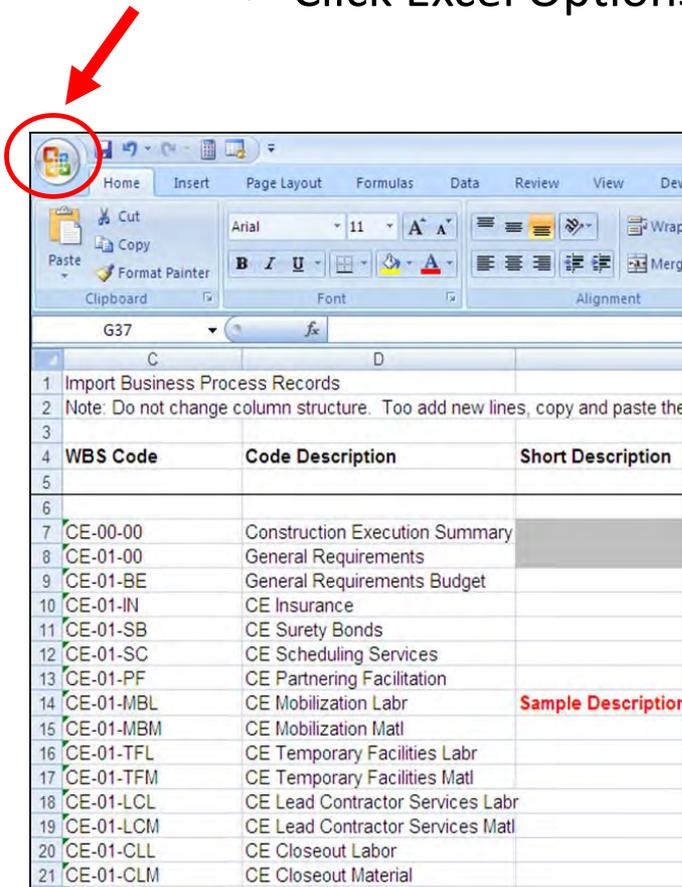
Form Title	Date	Number
OAKS CI Contract SOV Import Template - A/E (Cloud) (Excel)	2015-NOV	M140-05-CI
OAKS CI Contract SOV Import Template - A/E (K-12) (Excel)	2015-NOV	M140-05-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (Cloud) (Excel)	2015-NOV	M140-06-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (K-12) (Excel)	2015-NOV	M140-06-CI
OAKS CI Contract SOV Import Template - Contractor (Cloud) (Excel)	2015-NOV	M140-02-CI
OAKS CI Contract SOV Import Template - Contractor (K-12) (Excel)	v0314	M140-07-CI
OAKS CI Contract SOV Import Template - Owner Agent (Cloud) (Excel)	2015-NOV	M140-08-CI
OAKS CI Contract SOV Import Template - Owner Agent (K-12) (Excel)	2015-NOV	M140-08-CI
OAKS CI Contract SOV Import Template - Renovation Work (K-12) (Excel)	v0314	M140-09-CI

Enable Macros

▶ Step 2: Your Macros must be enabled to be able to prepare this file.

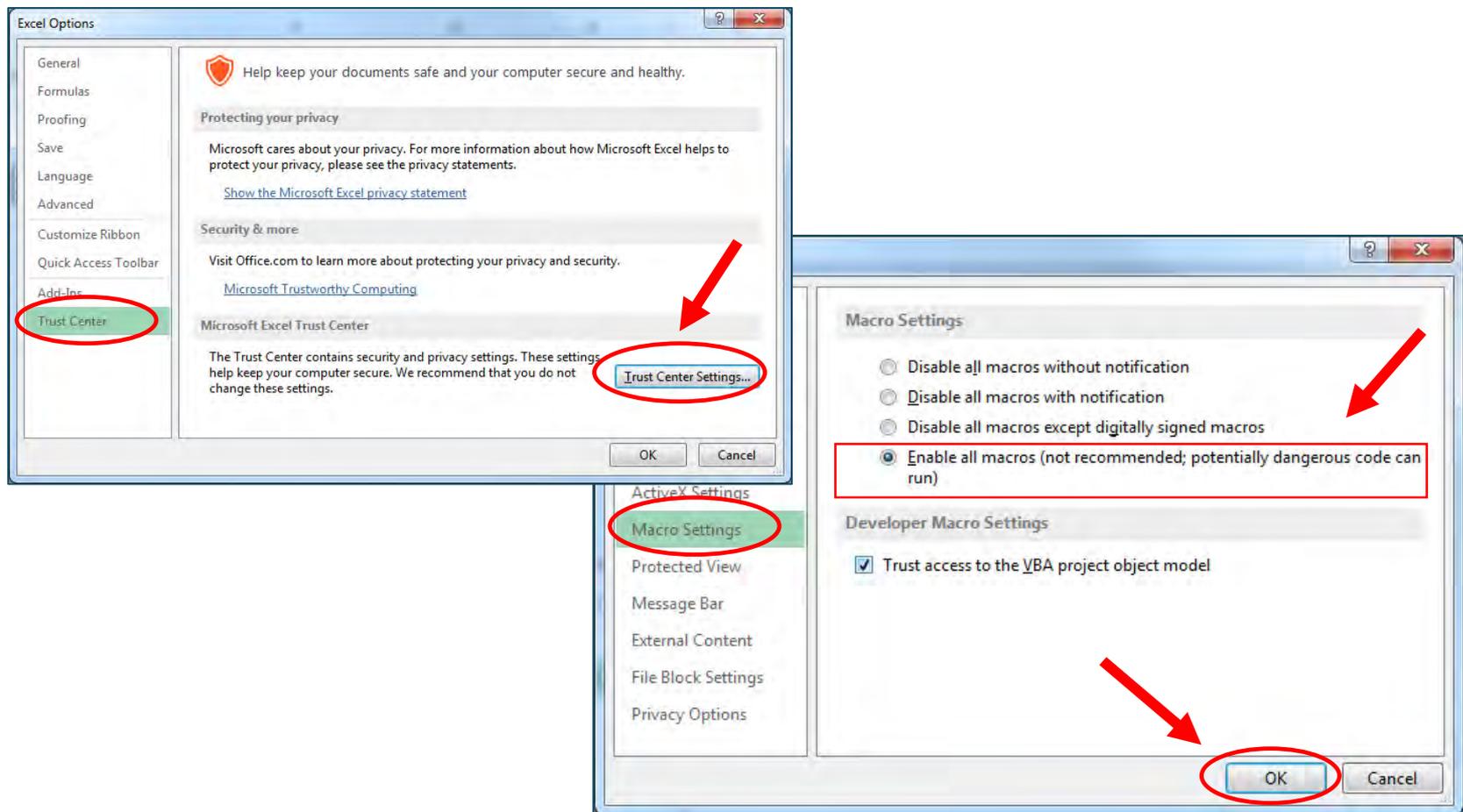
▶ To check that your macros are enabled:

- ▶ Click the Windows Circle or File (depends on version of Windows)
- ▶ Click Excel Options or Options (depends on version of Windows)



Enable Macros

- ▶ Click Trust Center -> Trust Center Settings
- ▶ Click Macro Settings
 - ▶ Choose “Enable all macros”
 - ▶ Check the “Trust access to the VBA project object model” box



Enter Line Items

▶ Step 3: 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 4: If necessary, add additional lines to the 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. The spreadsheet has columns C through J. Row 19 is highlighted, and a context menu is open over it. The menu options include Cut, Copy, Paste Options, Paste Special..., Insert, Delete, Clear Contents, Format Cells..., Row Height..., Hide, and Unhide. The 'Copy' option is circled in red. A red arrow points to the row number '19' in the left margin. The spreadsheet data includes a table with columns: WBS Code, Code Description, Short Description, Amount (\$), Subcontractor/Supplier, and Notes.

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 4 (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. A right-click context menu is open over row 18, with the 'Insert Copied Cells' option highlighted. A red box on the left contains the text 'New line will appear above here' with an arrow pointing to the menu. Another red arrow points from the 'Insert Copied Cells' option to a blue button labeled 'Prepare interface file' in the spreadsheet.

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		

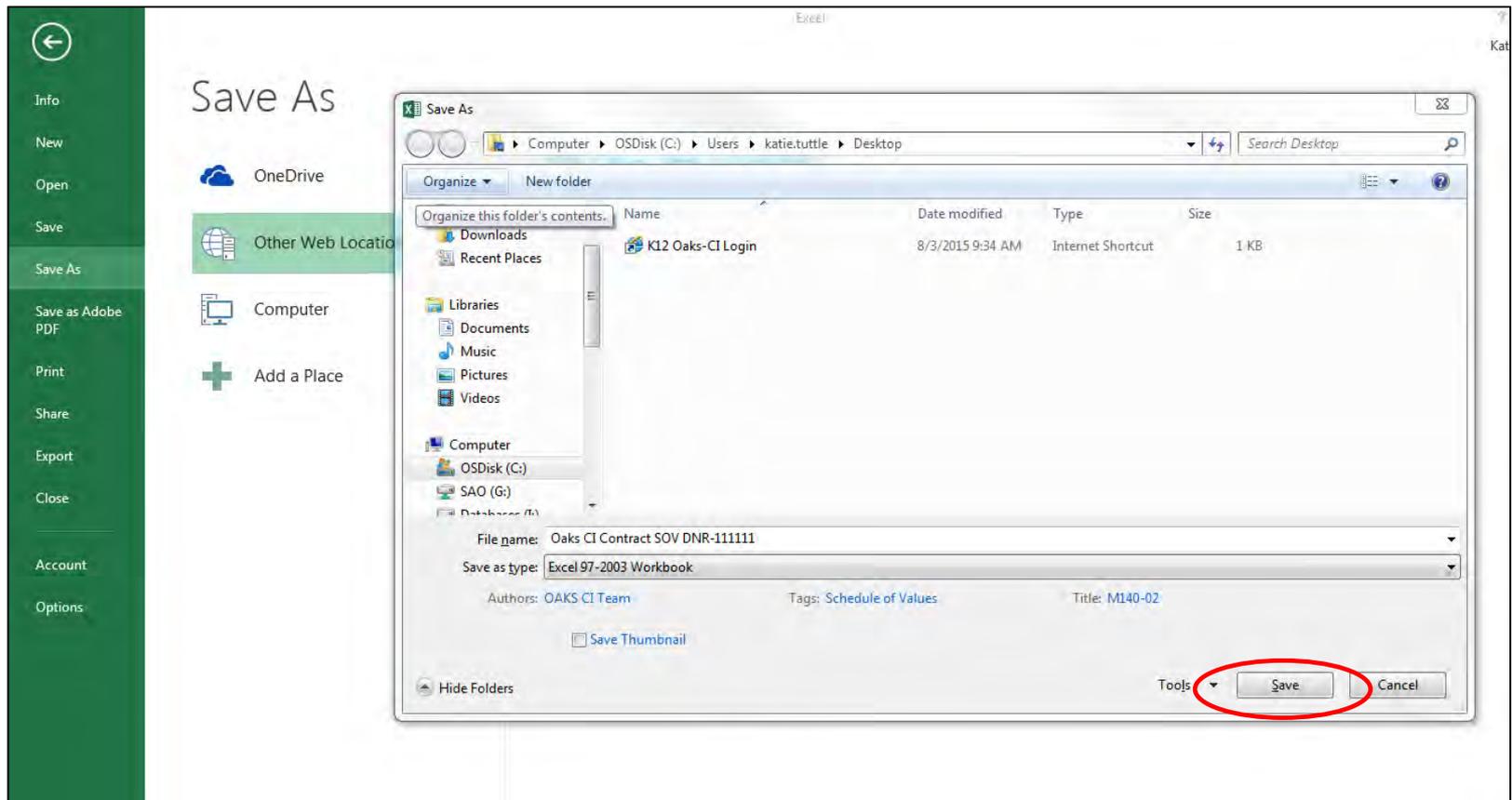
Enter Line Items

- ▶ Step 5:
 - ▶ Include **ONLY** EDGE Subcontractors/Suppliers
 - ▶ 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				

Enter Line Items

- ▶ Step 6:
 - ▶ Name and Save the Spreadsheet- Very Important!

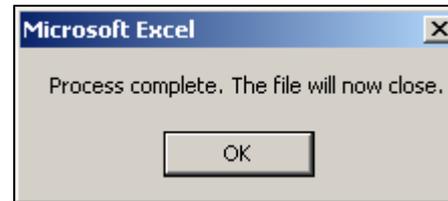


Enter Line Items

- ▶ Step 6:
 - ▶ **Make sure you have reviewed your spreadsheet with the Project Manager**
 - ▶ Click “Prepare Interface File”

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Sup
Import Business Process Records				
Note: Do not change column structure. To add new lines, copy and paste the entire line to be repeated.				
			\$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	Sample Description	\$3,000.00	
CE-01-MBM	CE Mobilization Matl			
CE-01-TEI	CE Temporary Facilities Labor			

This box will appear indicating the file preparation is complete.



GMP Subcontract Distribution Creation

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Change Order
 - ▶ Click New
 - ▶ Select GMP Subcontract Distribution Workflow and Click OK

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page title is "ORACLE PRIMAVERA UNIFIER" with a last login time of "09/29/2015 07:04 AM". The navigation pane on the left shows a tree structure with "Logs" selected and expanded. A red circle highlights the "Logs" folder, and a red arrow points from it to the "Change Order" menu item in the main content area. Another red circle highlights the "New" button in the "Change Order" menu, with a red arrow pointing to it. The main content area shows a table of Change Orders with columns "CO No." and "CO Type".

CO No.	CO Type
01	Request for Change O
001	Request for Change O
1	Request for Change O
1234	Change Directive
j	Request for Change O
6	Request for Change O
5	
3	
123	
1	Proposal Request
	Proposal Request

The screenshot shows the "Select Workflow" dialog box in a Windows Internet Explorer browser window. The "Business Process" field is set to "Change Order". The "Workflow" dropdown menu is open, showing several options. The option "GMP Subcontract Distribution" is highlighted with a red circle, and a red arrow points from the text in the instructions above to this option.

Business Process	Workflow
Change Order	Select
	Select
	GMP Amendment SAC
	GMP Subcontract Distribution
	SAC Change Directive

GMP Subcontractor Distribution

- ▶ In the OAKS CI Record, Complete mandatory fields highlighted with a red *

Change Order - Test - Project No. OCI-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=156105&id=5919&sourceId=0&project

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

Change Order

General

Organization: Department of Administrative Service Record Number:

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: OAKS CI Training 1 Creation Date:

Project Location: Surface Road Status:

Title: Test * Trade: Plumbing

Contract Reference: OCI-080001-03 Select... * Vendor Name: OAKS Plumbing

Change Order Type: GMP Amendment EDGE Certified Prime?: Yes

Change Order No.: Fee Title: SAO Standard Fee 1

GMP Amendment Contract Sum

Construction Design 0 Contingency % Cap: 0

Services Fee % Cap: CM/DB Fee % Cap: 0

Cost of the Work (\$): \$0.00

Construction Stage \$0.00 * Construction Personnel \$0.00

Personnel Costs (\$): Cost Cap (\$):

General Conditions \$0.00 * General Conditions \$0.00

Costs (\$): Costs Cap (\$):

Action Details

Line Item List

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

GMP Subcontractor Distribution

- ▶ Go to the 'Line Item List' Tab and Click 'Import'
- ▶ Click Browse and find the (.csv) version of the Excel file you previously saved
- ▶ Click Open, Click OK

The image shows a composite screenshot of a web application interface and two windows. The background window is titled 'Create New Change Order - Project No. SAT-120002 - Windows Internet Explorer'. It has a menu bar (File, Edit, View, Actions, Help) and a toolbar (Send, Save, Spelling, Add Attachment, Discussion). The 'General' section contains fields for Organization (Department of Administrative Services), Project Number (SAT-120002), Project Name (SAT 7 CM-R Test Project), Project Location (GSD Surface Rd), and Title. The 'Action Details' section has a 'Create New Change Order' button and a 'Send For:' field. The 'Line Item List' tab is selected and circled in red. Below it is a table with columns 'No.', 'Reference', 'WBS Code', and 'Code Name'. The 'Import' button is circled in red. A red arrow points from the 'Import' button to the 'Browse...' button in the 'File Upload' dialog.

The 'File Upload' dialog is titled 'File Upload - Google Chrome' and shows a table with columns 'Document Title', 'Rev. No.', 'Issue Date', and 'File Name'. The 'Browse...' button is circled in red. A red arrow points from the 'Browse...' button to the 'Open' dialog.

The 'Open' dialog is titled 'Open' and shows a file explorer view of the Desktop. The file list is as follows:

Name	Size	Item type
contracts	27 KB	PNG image
copying a record	670 KB	Microsoft Word Document
directions	41 KB	PNG image
DRC LocalAdminBPTTraining20120904	3,515 KB	Microsoft PowerPoint 97-2003 Presentation
F010-01-CI-OAKSCI-ApplicationforAccess	36 KB	Microsoft Word Document
M140-02-CI-Contract_SOV_Import_Template (5)	1 KB	Microsoft Excel Comma Separated Values File
M140-02-CI-Contract_SOV_Import_Template (5)	120 KB	Microsoft Excel 97-2003 Worksheet
service now issue	211 KB	Microsoft Word Document
Submittals	1,107 KB	Adobe Acrobat Document
Temporarily Run another version of IE and Compa...	719 KB	Microsoft Word Document

The file 'M140-02-CI-Contract_SOV_Import_Template (5)' is circled in red. The 'Open' button is also circled in red.

GMP Subcontractor Distribution

- ▶ You must now select the line from your SOV that you will be deducting from. This line should be the Subcontracted work line if you have exhausted all of the money from this line then choose your Contingency or other applicable line to fund the imported line items.
- ▶ Once the form has been imported, click the Add button

Change Order - Remaining SOV Distribution - Project No. DOT-130006 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=10208&model=uco&fromcostlog=1&project_id=1

File Edit View Actions Help

Save Spelling... Add Attachment SOV Close Window

Change Order

General

Task Details

Line Item List

Current View: All Show Currency in: Transaction Currency

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

Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/Sup
17	OR-CF-DB	Design-Build Contingency	Contingency	\$24,495.40	
0	CE-FC-13M	Specialties Matl	Cold Storage 3 Coat Metal Panels	\$52,867.00	Carter Lumber,
195	CE-FC-13M	Specialties Matl	Cold Storage Building - Material	(\$22,679.00)	84 Lumber Co.
0	CE-FC-13M	Specialties Matl	Snow Guards	\$8,706.00	
0	CE-FC-13M	Specialties Matl	PEMB Insulation	\$24,748.00	Bay Insulation
0	CE-FC-11M	Equipment Matl	Welding Curtain	\$582.60	
0	CE-FC-11M	Equipment Matl	Metal Shelving	\$12,450.00	
0	CE-FC-11M	Equipment Matl	Appliances	\$830.00	
0	CE-FC-11M	Equipment Matl	Egress Signs	\$120.00	REM Graphics
0	CE-FC-05M	Metals Matl	Cold Storage Guard Rail	\$3,345.00	Paul Peterson
0	CE-FC-05L	Metals Labr	Cold Storage Guard Rail	\$650.00	Paul Peterson
0	CE-SI-32M	Exterior Improvements Matl	Paving - Top Coat	\$68,697.00	York Paving Co
0	CE-SI-32L	Exterior Improvements Labr	Paving - Top Coat	\$45,798.00	York Paving Co
0	CE-SI-32M	Exterior Improvements Matl	Paving - Intermediate	\$65,231.00	York Paving Co
0	CE-SI-32L	Exterior Improvements Labr	Paving - Intermediate	\$44,488.00	York Paving Co

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

Total Amount: \$ 0.00

GMP Subcontractor Distribution

- Once you have chosen the Subcontracted work line, add a short description and the amount to be deducted from the code. Ensure the amount you enter is a **negative dollar amount**.

The screenshot shows a web browser window titled "Line Item - Windows Internet Explorer" displaying a "Change Order Line Item" dialog. The dialog has a "General" tab selected. The fields are as follows:

- Reference: Specialties Mtl. (with a "Select..." button)
- WBS Code: CE-A40-03L (with a dropdown arrow and a red asterisk)
- Code Name: (empty field)
- Short Description: Cold Storage (with a red asterisk)
- Amount (\$): -5,000.00 (with a red asterisk and a red circle around the value)
- EDGE Certified Prime Contractor?: No
- Subcontractor/Supplier: (with a "Select..." button)
- Subcontractor/Supplier: (empty field)
- EDGE Certified Sub?: (empty field)

At the bottom of the dialog, there are "Attachments (0)" and "Linked Records (0)" labels, and "OK" and "Cancel" buttons.

GMP Subcontractor Distribution

- ▶ Once complete, your record should look similar to the one shown below
 - ▶ Note the total dollar amount is 0
- ▶ Choose your Workflow action in the upper right hand corner and click Send

The screenshot shows a web browser window titled "Create New Change Order - Project No. OCI-080001 - Google Chrome". The URL is https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=99792&module_name=uco&csvimport=false. The browser menu bar includes File, Edit, View, Actions, and Help. The application toolbar contains buttons for Send, Save, Spelling, Add Attachment, Discussion, SOV, and Close Window. The "Workflow Actions" dropdown menu is open, showing options: -Select-, -Select-, and Submit. The main content area is titled "Change Order" and includes sections for General, Task Details, and Line Item List. The Line Item List shows 41 items with columns for Reference, WBS Code, Code Name, Short Description, Amount, and Subcontractor/Supplier. The total amount is \$0.00. The interface also includes a "Grid" button, a "Find" search box, and links for Attachments (0), Linked Records (0), General Comments, and Linked Mail (0).

Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/Sup
17	OR-CF-DB	Design-Build Contingency	Contingency	\$24,495.40	
0	CE-FC-13M	Specialties Matl	Cold Storage 3 Coat Metal Panels	\$52,867.00	Carter Lumber,
195	CE-FC-13M	Specialties Matl	Cold Storage Building - Material	(\$22,679.00)	84 Lumber Co.
0	CE-FC-13M	Specialties Matl	Snow Guards	\$8,706.00	
0	CE-FC-13M	Specialties Matl	PEMB Insulation	\$24,748.00	Bay Insulation
0	CE-FC-11M	Equipment Matl	Welding Curtain	\$582.60	
0	CE-FC-11M	Equipment Matl	Metal Shelving	\$12,450.00	
0	CE-FC-11M	Equipment Matl	Appliances	\$830.00	
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0	CE-SI-32M	Exterior Improvements Matl	Paving - Intermediate	\$65,231.00	York Paving Co
0	CE-SI-32L	Exterior Improvements Labr	Paving - Intermediate	\$44,488.00	York Paving Co

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211