



# GMP Amendment & Subcontract Distribution

# **GMP Amendment**

# DocuSign Enabled BP

- ▶ The Contract Modification 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 Contract Modification 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/K-12Training.aspx>

# Purpose & Process

- ▶ 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: **Project Coordinator** → Sent to: **PM Review** → Sent to: **PC Update (if necessary)** → Sent to: **PC for Validation and Document Prep** → Sent to: **Vendor signature via DocuSign**

# **GMP Subcontract Distribution**

# 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 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

**OFCC**  
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Standard Forms

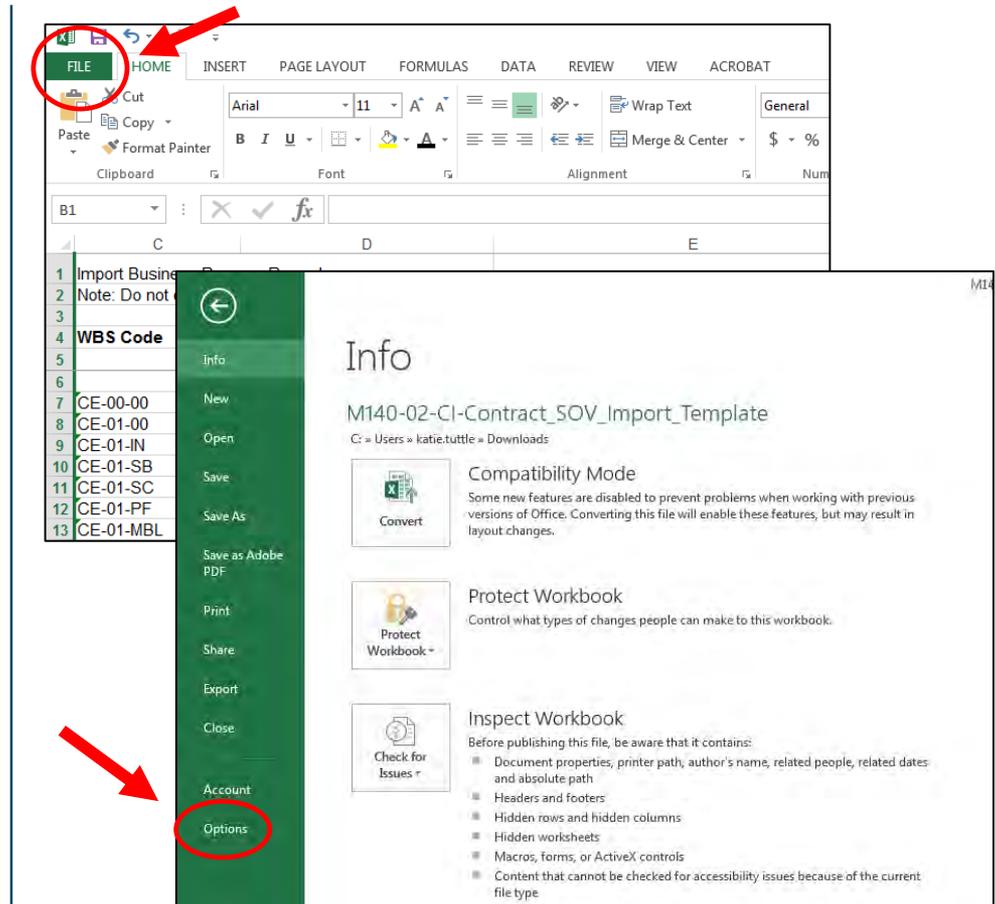
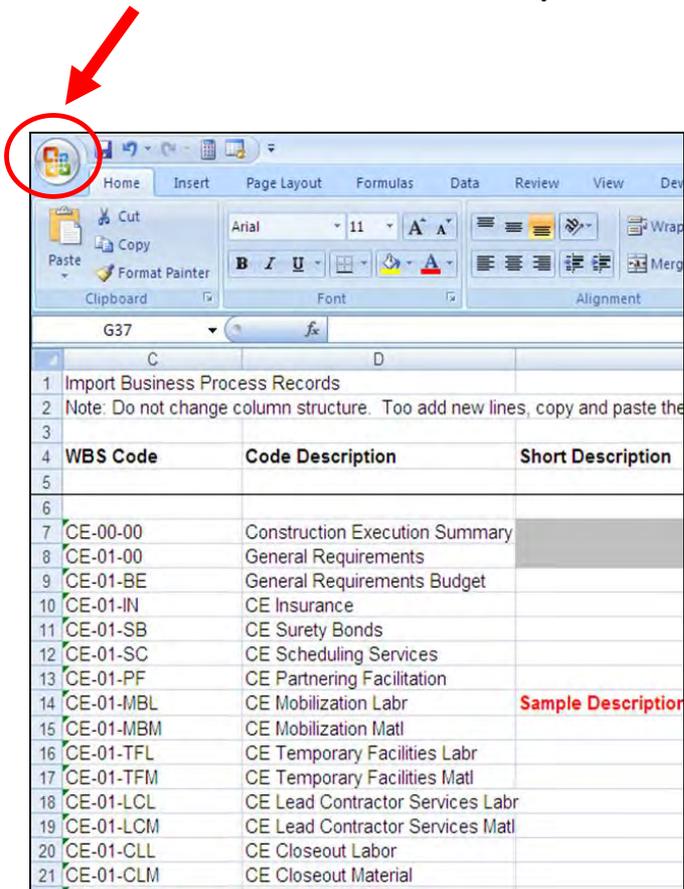
Concept Development Procurement Design Construction Post-Construction Misc

**Procurement Forms**  
*(Note: The Procurement Agreements have moved to the Agreements and Standard Requirements block below).*  
*Page last updated: November 4, 2015*

Form Title	Date	Number
Using the Contract SOV Import Template (PDF)	v1012	M140-03-CI
Running the Contract SOV Macro (PDF)	v1012	M140-04-CI
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

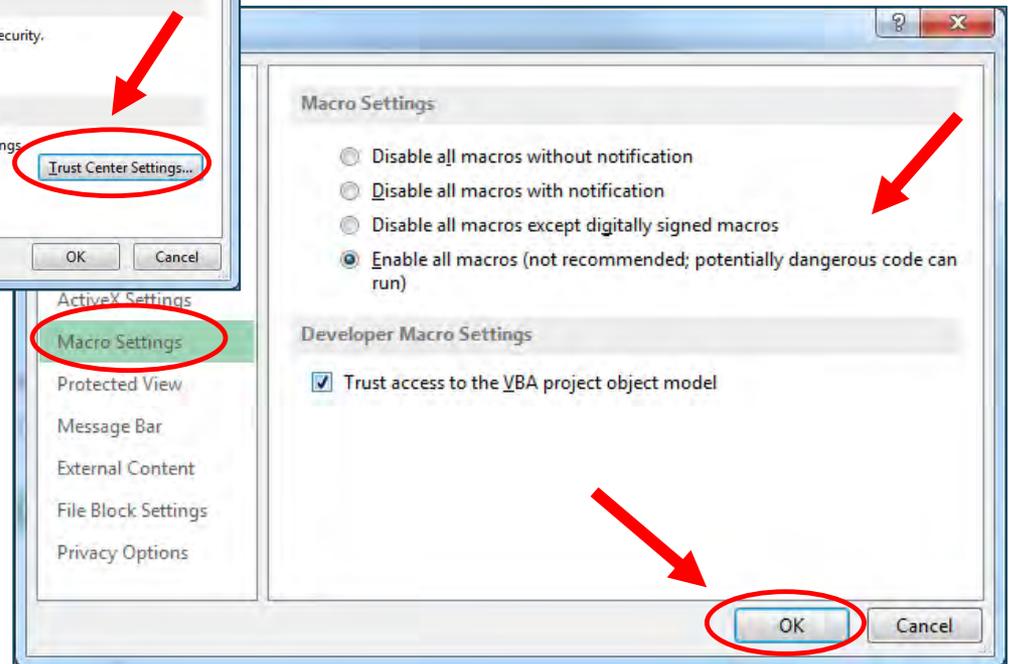
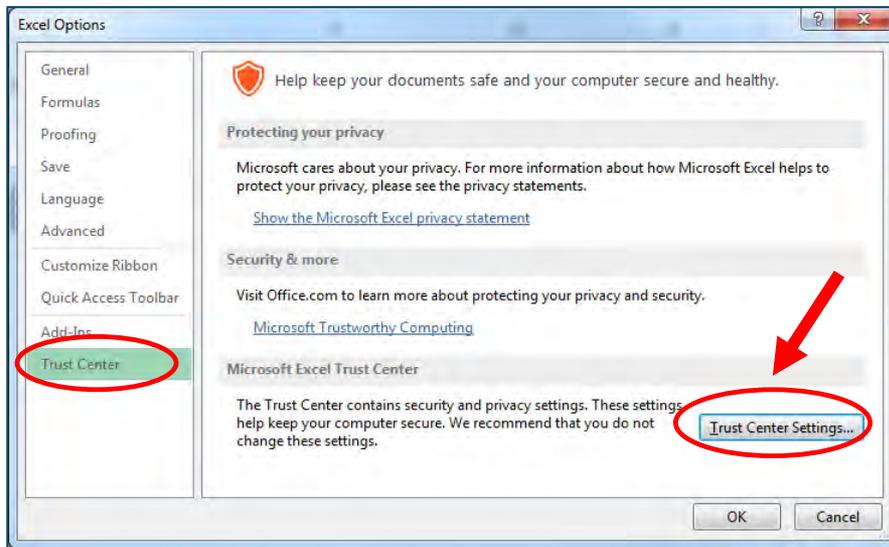
# Enable Macros

- ▶ 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	<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 4: 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. The spreadsheet has columns C through J. Row 19 is highlighted, and a right-click 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. 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				
CE-FC-08M	Openings Matl				

# Enter Line Items

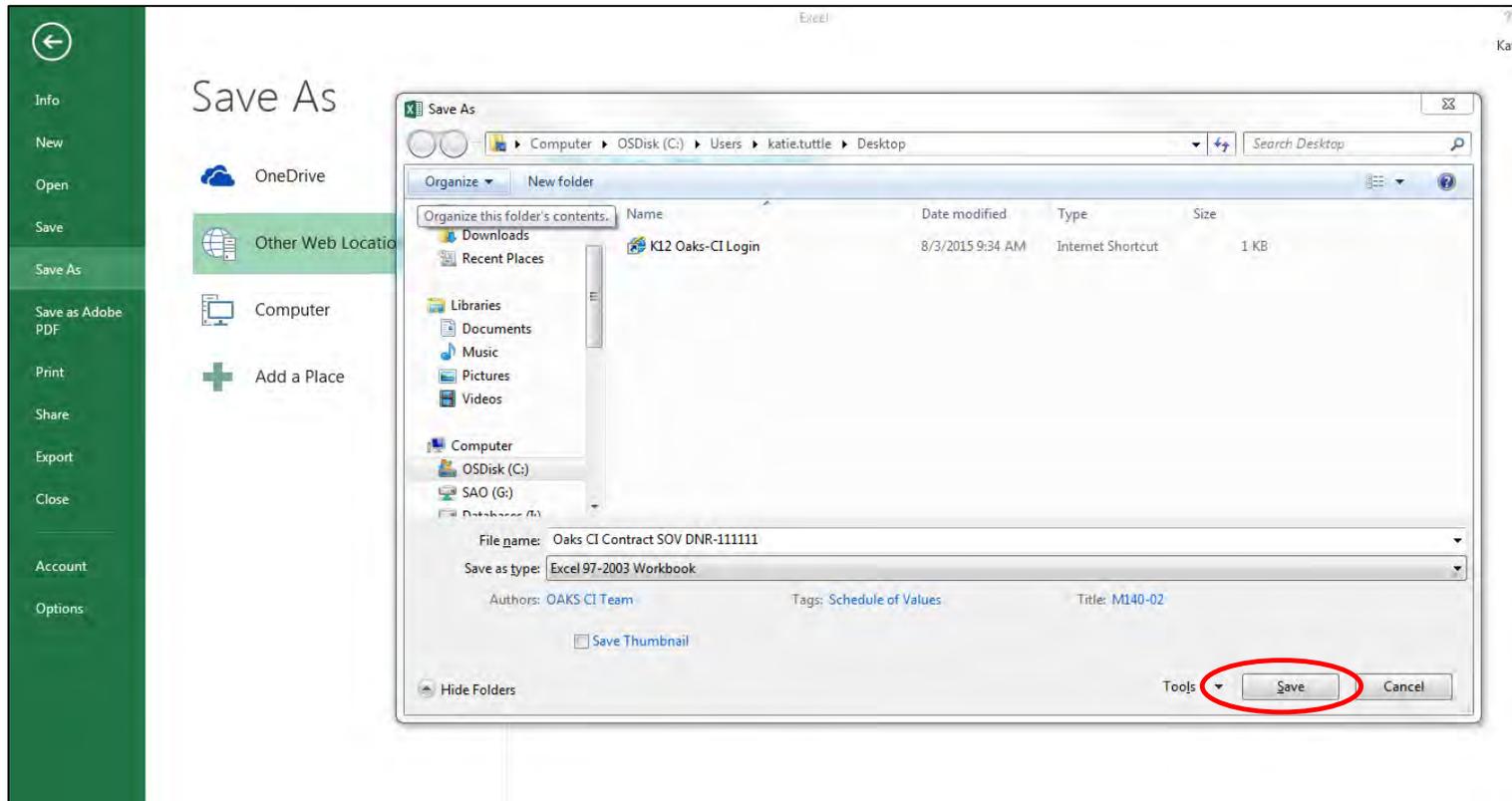
## ▶ Step 5:

- ▶ 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

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
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 Labr			
34	CE-FC-06M	Wood Plastic and Composite Matl			
35	CE-FC-07L	Thermal and Moisture Prottn Labr			
36	CE-FC-07M	Thermal and Moisture Prottn 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 6:
  - ▶ Name and Save the Spreadsheet
  - ▶ Email the Spreadsheet to you're A/E, Project Manager, and Project Coordinator for review



# Task Action

- ▶ Once the PC has created the GMP Subcontract Distribution record in OAKS CI you will receive it as a Task for review
- ▶ Log into your project
- ▶ Navigate to:
  - ▶ Collaboration -> Tasks
  - ▶ Double Click your Contract Modification Task to open

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL: <https://ohio-dev-unifier.oracleindustry.com>. The page title is "ORACLE PRIMAVERA UNIFIER" and the user is logged in as "Unifier@https://ohio-dev-unifier.oracleindustry.com". The navigation menu includes "Home", "Company Workspace", and "Oak Hills Local Bu...". The "Tasks" section is active, showing a list of 6 items. A red arrow points to the task "Contract Modification K12" with ID "CM-0002".

Type	Number	Title	Record Due	Fr
Contract Modification K12	CM-0002	Test 2		Ka
Contract Modification K12	CM-0001	Test		Ka
Contract Schedule of Values K12	SOV-002	Test 2 SOV		Ka
Request for Interpretation K12	RFI-01	Test RFI		Ka
Submittals K12	SUB-0001	Test Submittal		Ka
Contract K12	CON-003	Test Contract 3		Ka

# Accept the Task

- ▶ Click Accept Task to begin reviewing the record

Contract Modification K12 - Test 2 - Project No. SFC-080001.01 - Google Chrome

[https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task\\_id=156804&parent\\_id=0&viewOnly=0&project\\_](https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=156804&parent_id=0&viewOnly=0&project_)

File Edit View Actions Help

**Accept Task** Decline Task SOV Close Window

### Contract Modification K12

#### General

Project Number: SFC-080001.01 Record Number: CM-0002  
Project Name: Oak Hills Local Building Project Creator: Katie Tuttle  
Organization Name: Creation Date: 03/03/2016 12:16 PM (UTC-8)  
Facility Name: Status: Pending

#### Task Details

From: Katie Tuttle Task Due Date: Task Notes (0)  
To: A. E. Barbara Taylor More... Task Status: Not Started  
Cc:  
Sent For: AE Review

#### Line Item List

62 Item(s) Page 1 of 1 Display 100 items per page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	SubcontractorSu
064	14	OR-CF-CM	CM at Risk Contingency	Transfer Self Perform CMR Continge	3,188.00	0	
063	13	CE-CE-SP	Self-Performed Work	Transfer balance to Contingency	-3,188.00	0	
062	12	CE-CE-SW	Subcontractor Work Allowa	Subcontracted Work	149,077.00	0	
061	13	CE-CE-SP	Self-Performed Work	Move Funds to Cover Subcontract W	-149,077.00	0	
060	14	OR-CF-CM	CM at Risk Contingency	Sitework - Bid Overage	-52,124.00	0	
059	0	CE-G-BE	CE Sitework Budget	Sitework - Bid	827,000.00	0	
058	0	CE-D60-BE	CE Technology Budget	Alternate #45 - Data Communication	8,500.00	0	
057	0	CE-D60-BE	CE Technology Budget	Alternate #19 - Communications Co	46,500.00	0	
056	0	CE-D60-BE	CE Technology Budget	Alternate #45 - Data Communication	8,500.00	0	

Total Amount: \$ 0.00

Grid Find 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

Contract Modification K12 - Test 2 - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task\_id=156804&model=acmk&project\_id=1086&in

File Edit View Actions Help

Workflow Actions Accept

Accept

Return for Clarification

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification K12

General

Project Number: SFC-080001.01 Record Number: CM-0002

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

Organization Name: Creation Date: 03/03/2016 12:16 PM (UTC-8)

Action Details

Accept (Click here to view latest content)

To... Barbara Taylor,Katie Tuttle,Kaylie Ruff,Moenig

Cc...

Send For: PM Approval

Task Notes:

Line Item List

62 item(s) Page 1 of 1 Display 100 items per page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Su
064	14	OR-CF-CM	CM at Risk Contingency	Transfer Self Perform CMR Continge	3,188.00	0	
063	13	CE-CE-SP	Self-Performed Work	Transfer balance to Contingency	-3,188.00	0	
062	12	CE-CE-SW	Subcontractor Work Allowa	Subcontracted Work	149,077.00	0	
061	13	CE-CE-SP	Self-Performed Work	Move Funds to Cover Subcontract W	-149,077.00	0	
060	14	OR-CF-CM	CM at Risk Contingency	Sitework - Bid Overage	-52,124.00	0	
059	0	CE-G-BE	CE Sitework Budget	Sitework - Bid	827,000.00	0	
058	0	CE-D60-BE	CE Technology Budget	Alternate #45 - Data Communication	8,500.00	0	
057	0	CE-D60-BE	CE Technology Budget	Alternate #19 - Communications Co	46,500.00	0	
056	0	CE-D60-BE	CE Technology Budget	Alternate #16 - SST (Contract)	11,500.00	0	

Grid Find Total Amount: \$ 0.00

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

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211