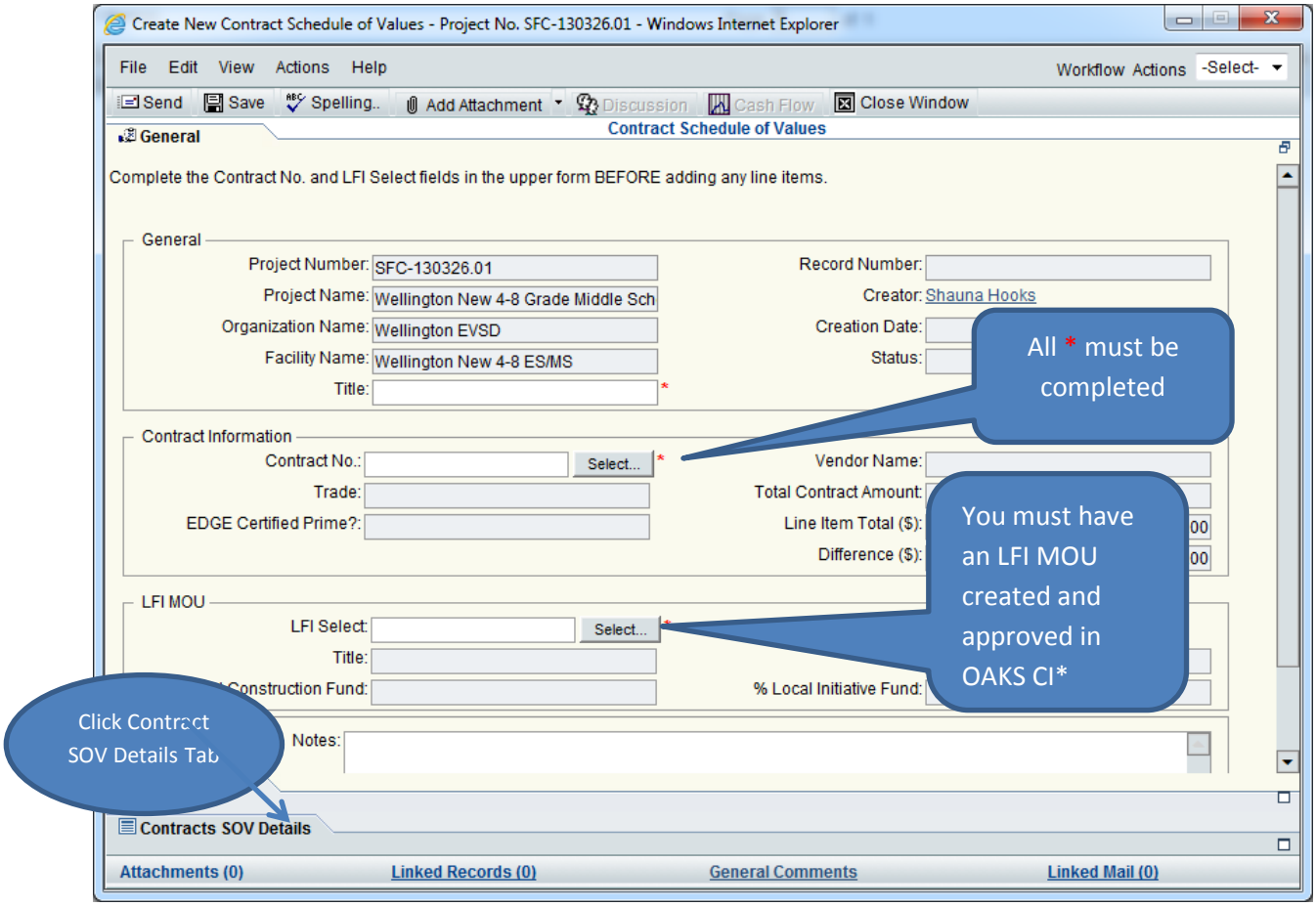
Contract SOV

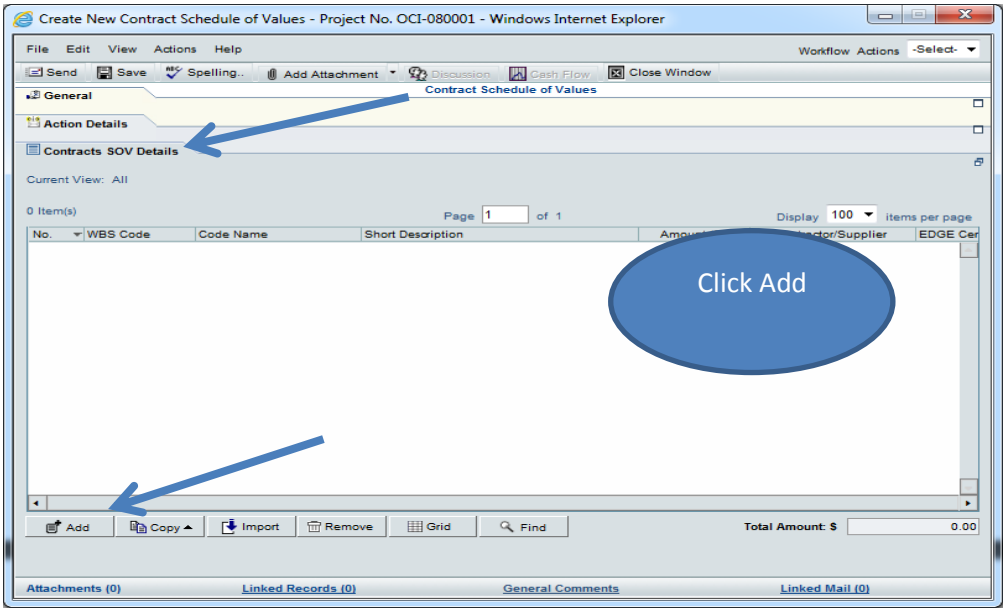
Once the Contract has been approved in OAKS CI, the Contract SOV will be created. The SOV will consist of Preconstruction line items.

Created by:
CMR/DB --**Agency/Higher Ed.**
Project Coordinator ---**School District projects**

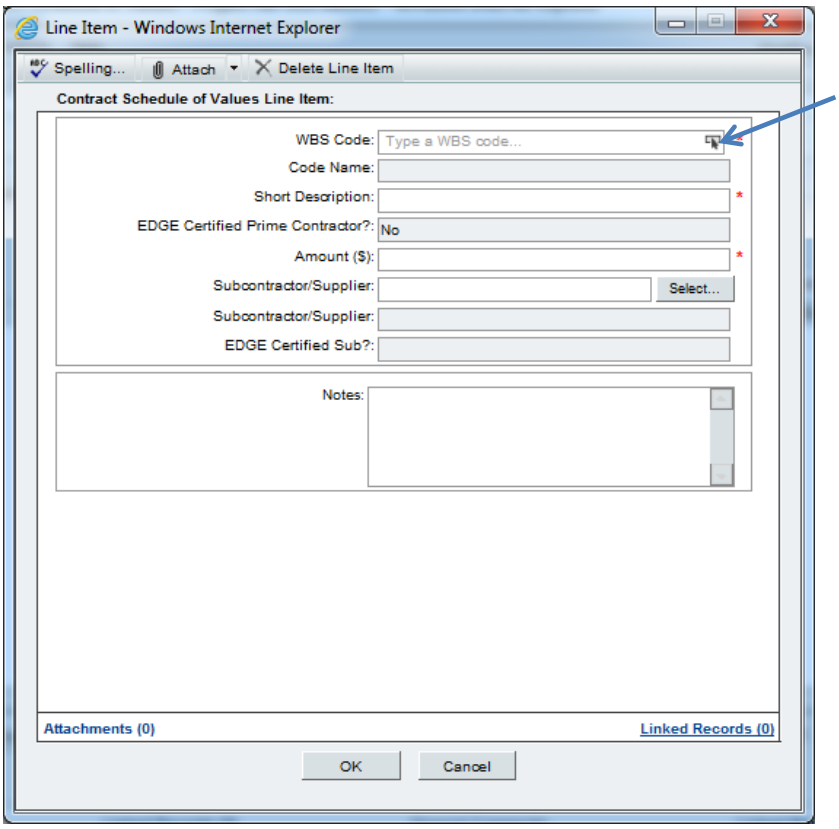
Note: If you have any pre con work provided by an Edge provider the Subcontractor Supplier declaration must be approved in OAKS CI prior to the SOV submission
Note: An LFI MOU record must be created and approved in OAKS CI prior to Submission of Contract SOV

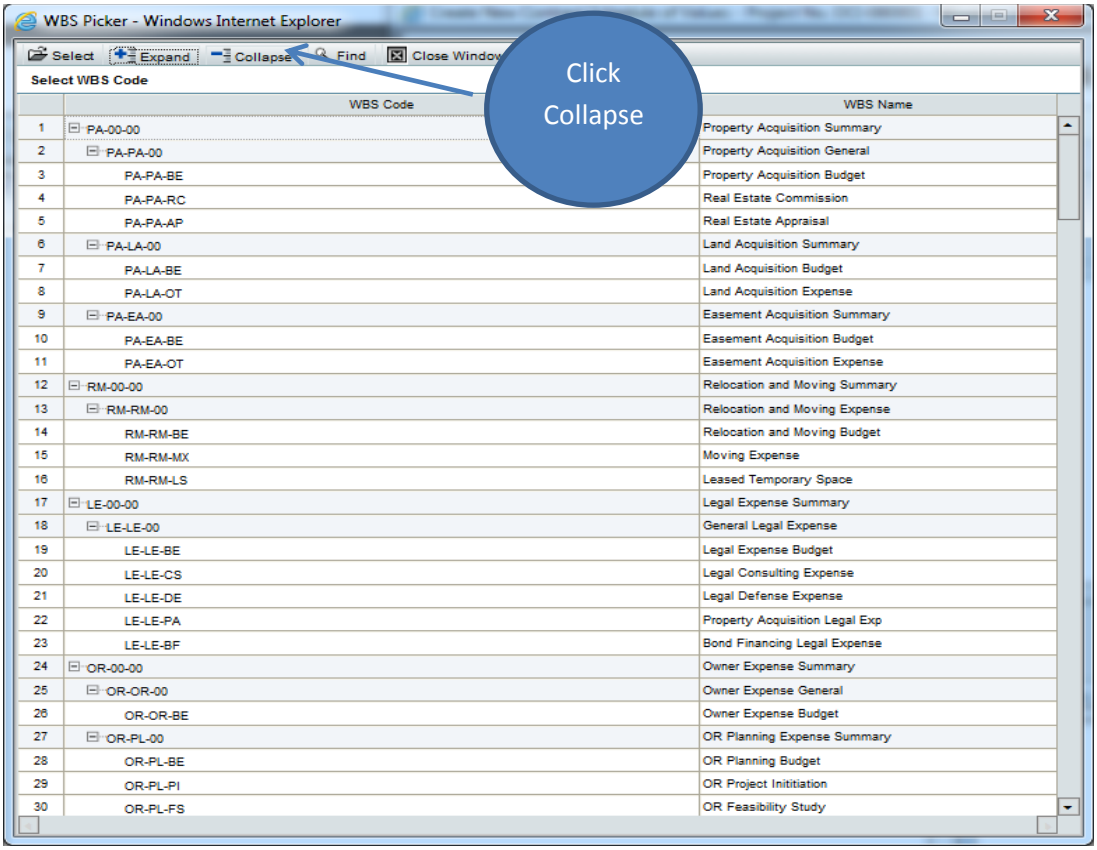
Complete all of the necessary information in the upper form.

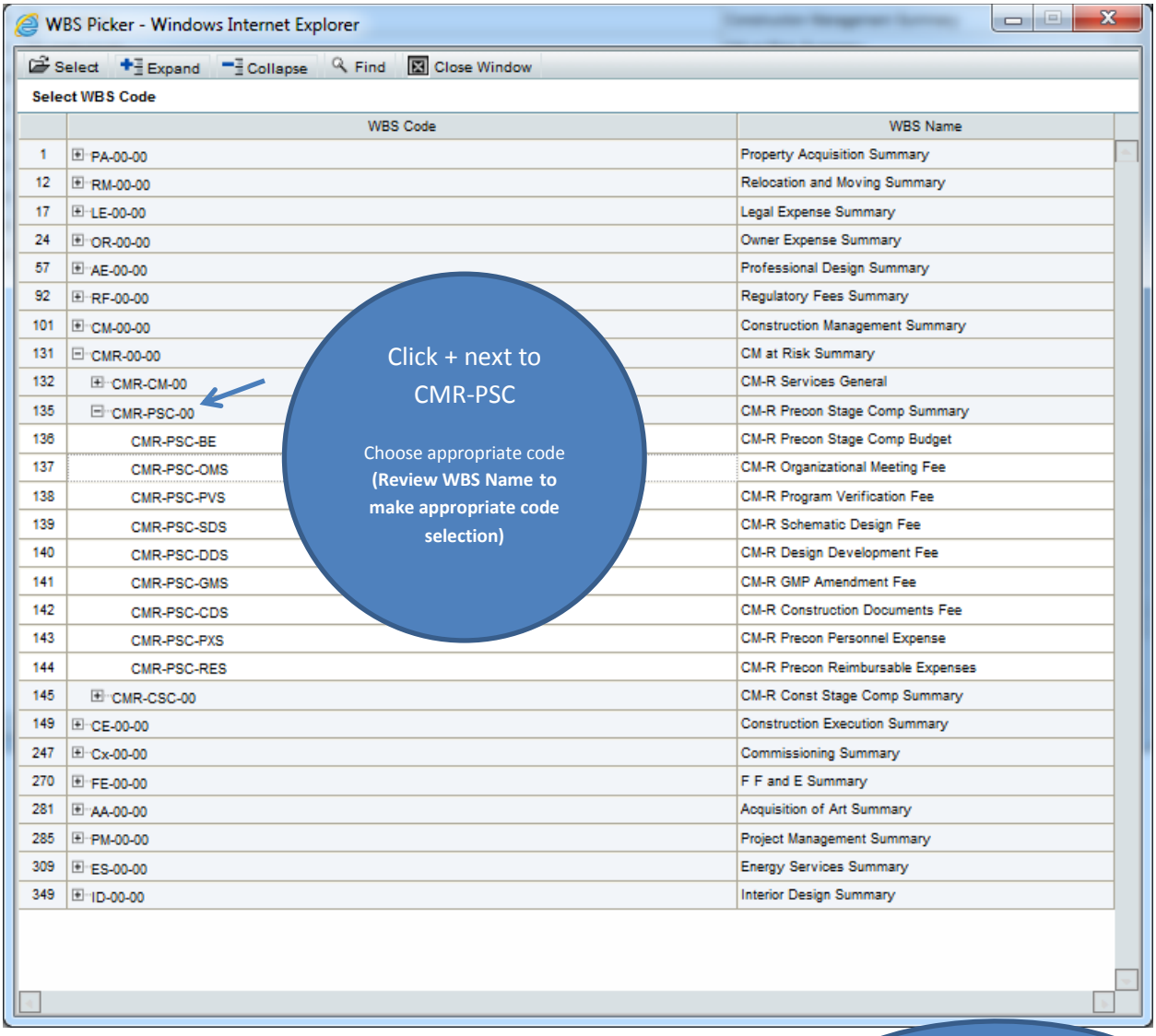


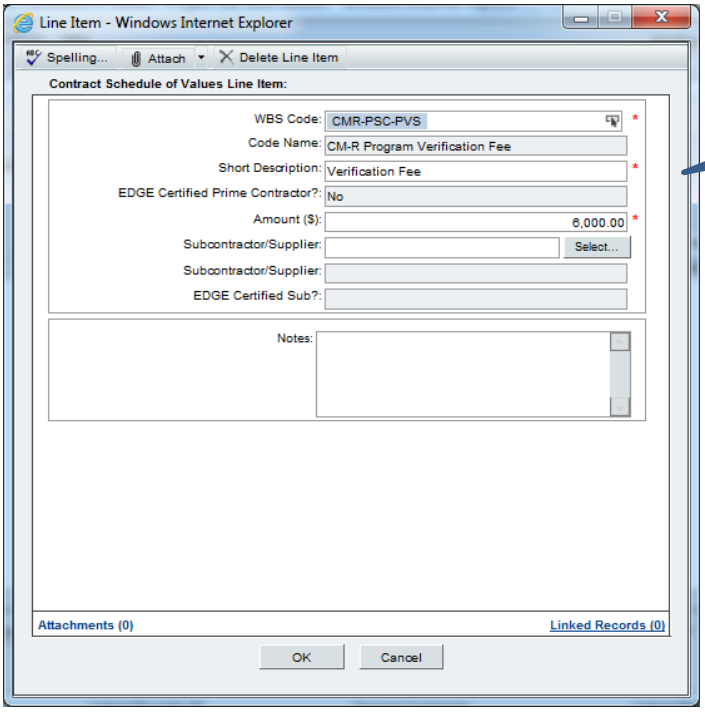


Click the arrow next to WBS Code:




WBS Picker - Windows Internet Explorer
Select
Expand
Collapse
Find
Close Window
Click Collapse
Select WBS Code
WBS Code
WBS Name
1 PA-00-00 Property Acquisition Summary
2 PA-PA-00 Property Acquisition General
3 PA-PA-BE Property Acquisition Budget
4 PA-PA-RC Real Estate Commission
5 PA-PA-AP Real Estate Appraisal
6 PA-LA-00 Land Acquisition Summary
7 PA-LA-BE Land Acquisition Budget
8 PA-LA-OT Land Acquisition Expense
9 PA-EA-00 Easement Acquisition Summary
10 PA-EA-BE Easement Acquisition Budget
11 PA-EA-OT Easement Acquisition Expense
12 RM-00-00 Relocation and Moving Summary
13 RM-RM-00 Relocation and Moving Expense
14 RM-RM-BE Relocation and Moving Budget
15 RM-RM-MX Moving Expense
16 RM-RM-LS Leased Temporary Space
17 LE-00-00 Legal Expense Summary
18 LE-LE-00 General Legal Expense
19 LE-LE-BE Legal Expense Budget
20 LE-LE-CS Legal Consulting Expense
21 LE-LE-DE Legal Defense Expense
22 LE-LE-PA Property Acquisition Legal Exp
23 LE-LE-BF Bond Financing Legal Expense
24 OR-00-00 Owner Expense Summary
25 OR-OR-00 Owner Expense General
26 OR-OR-BE Owner Expense Budget
27 OR-PL-00 OR Planning Expense Summary
28 OR-PL-BE OR Planning Budget
29 OR-PL-PI OR Project Inititiation
30 OR-PL-FS OR Feasibility Study





Ensure that all * areas are completed

Repeat steps from pages 1-3 until all necessary lines have been added

Sample of completed lower form

Contract Schedule of Values - CMR-Ozanne-SOV-PreCon - Project No. SFC-130326.01 - Windows Internet Explorer

File Edit View Actions Help

Save | Spelling.. | Add Attachment | SOV | Cash Flow | Close Window

General — Contract Schedule of Values

Task Details

Contracts SOV Details

Current View: All — Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount ($)	Subcontractor Supplier	EDGE Certified?	LFI Percent
004	CMR-PSC-RES	CM-R Precon Reimbursable Expense	Reproduction	1,600.00			22.79
003	CMR-PSC-RES	CM-R Precon Reimbursable Expense	Bond	480.00			22.79
002	CMR-PSC-PXS	CM-R Precon Personnel Expense	DPE-PreCon-EDGE	11,096.00	McGuinnes Unlim	Yes	22.79
001	CMR-PSC-PXS	CM-R Precon Personnel Expense	DPE-PreCon	42,208.00			22.79

Grid | Find — Total Amount: $ 55,384.00

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

Once all lines have been added:

Choose the Workflow action **Submit** in the upper right hand corner of the record)
Click **Send** in the upper left hand corner of the record.

A

B

Create New Contract Schedule of Values - Project No. SOC-120001 - Windows Internet Explorer

File Edit View Actions Help — Workflow Actions -Select- (-Select- / Submit)

Send | Save | Spelling.. | Add Attachment | Discussion | Cash Flow | Close Window

General — Contract Schedule of Values

General

Organization: Southern State Community College
Project Number: SOC-120001
Project Name: Brown County Campus
Project Location: Southern State Community College
Title:

Record Number:
Creator: Nathan Minnich-Weber
Creation Date:
Status:
Fee Title: SAO Standard Fee 1

Action Details

Create New Contract Schedule of Values

To...

Task Notes:

<u>GMP Amendment</u> (usually created during design documentation by the Construction Manager)

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.

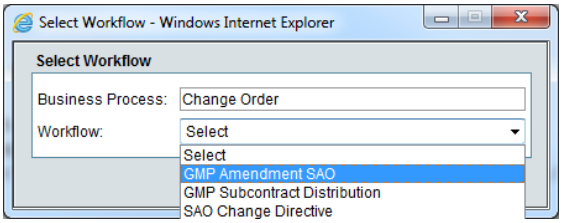
Created by:
CMR/DB Agency projects
Project Coordinator School District projects

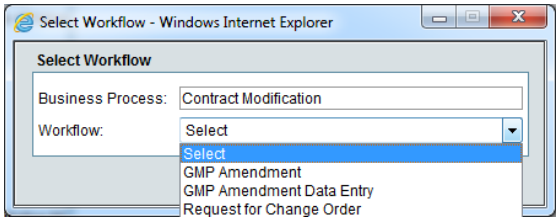
Go to Logs

Click Change Order or Contract Modification

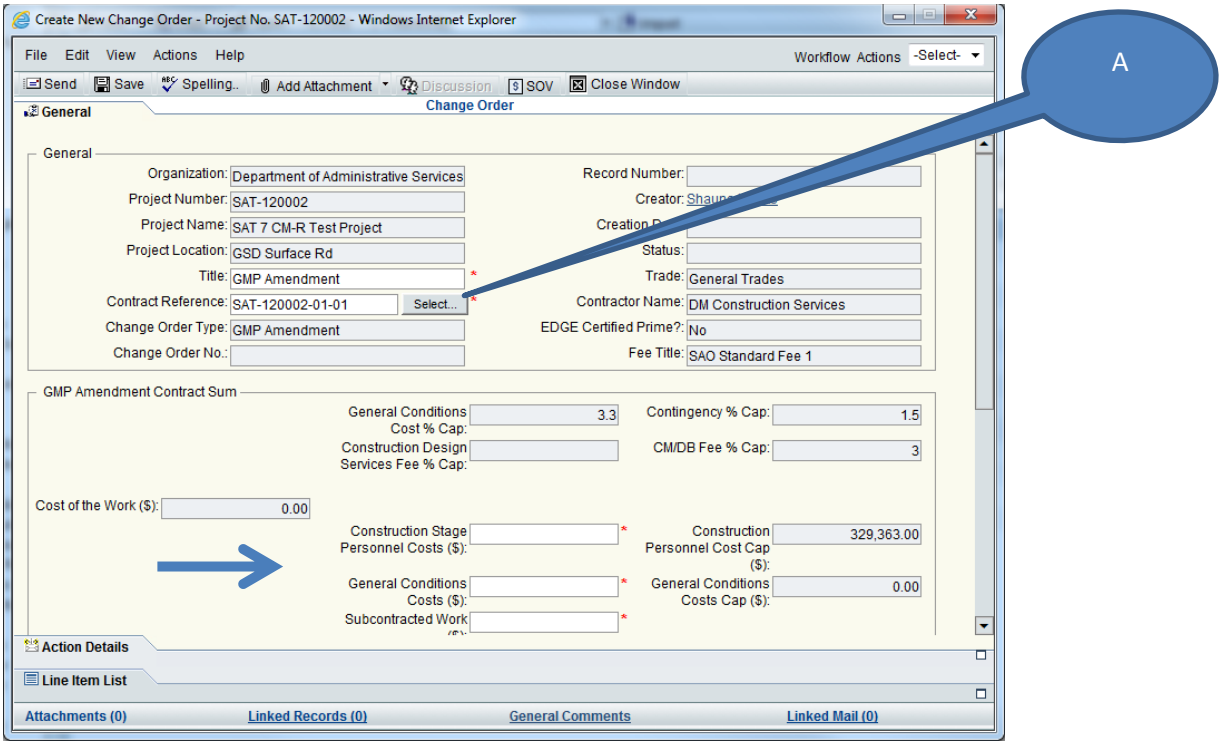
Click New at the top of your screen.

Choose the GMP Amendment Workflow and click OK

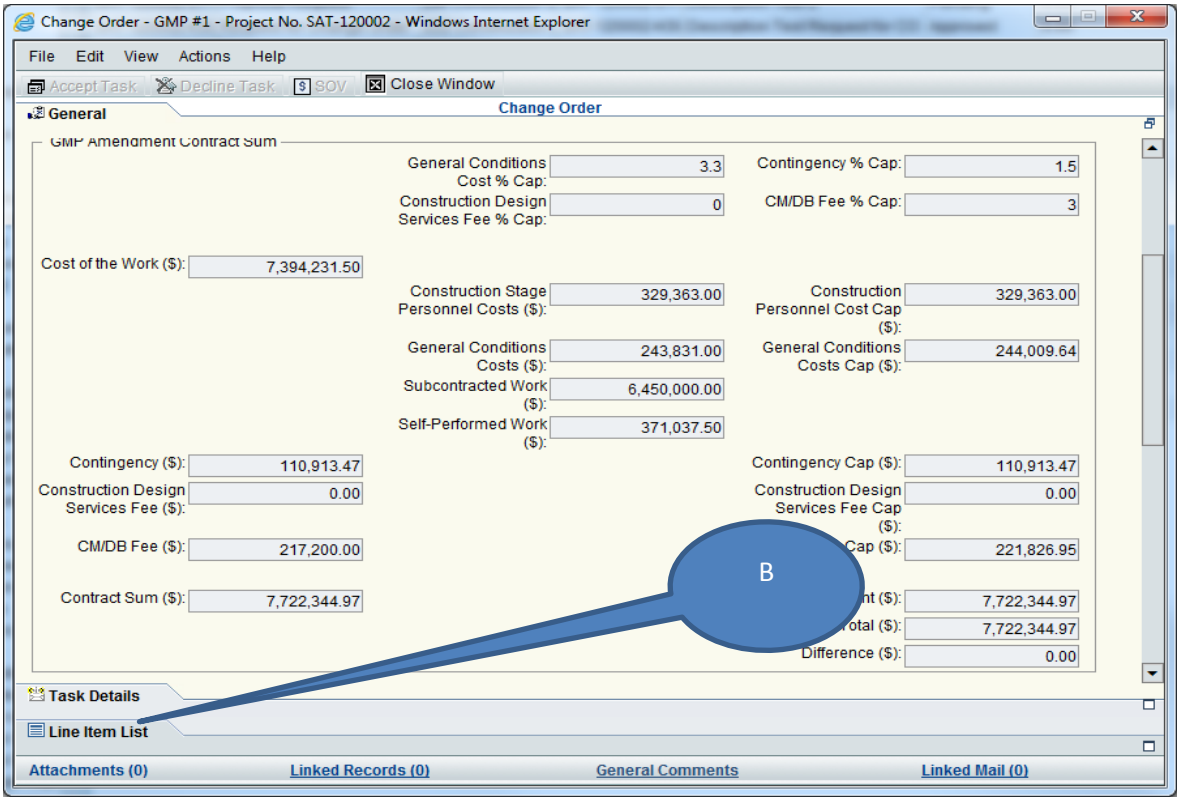


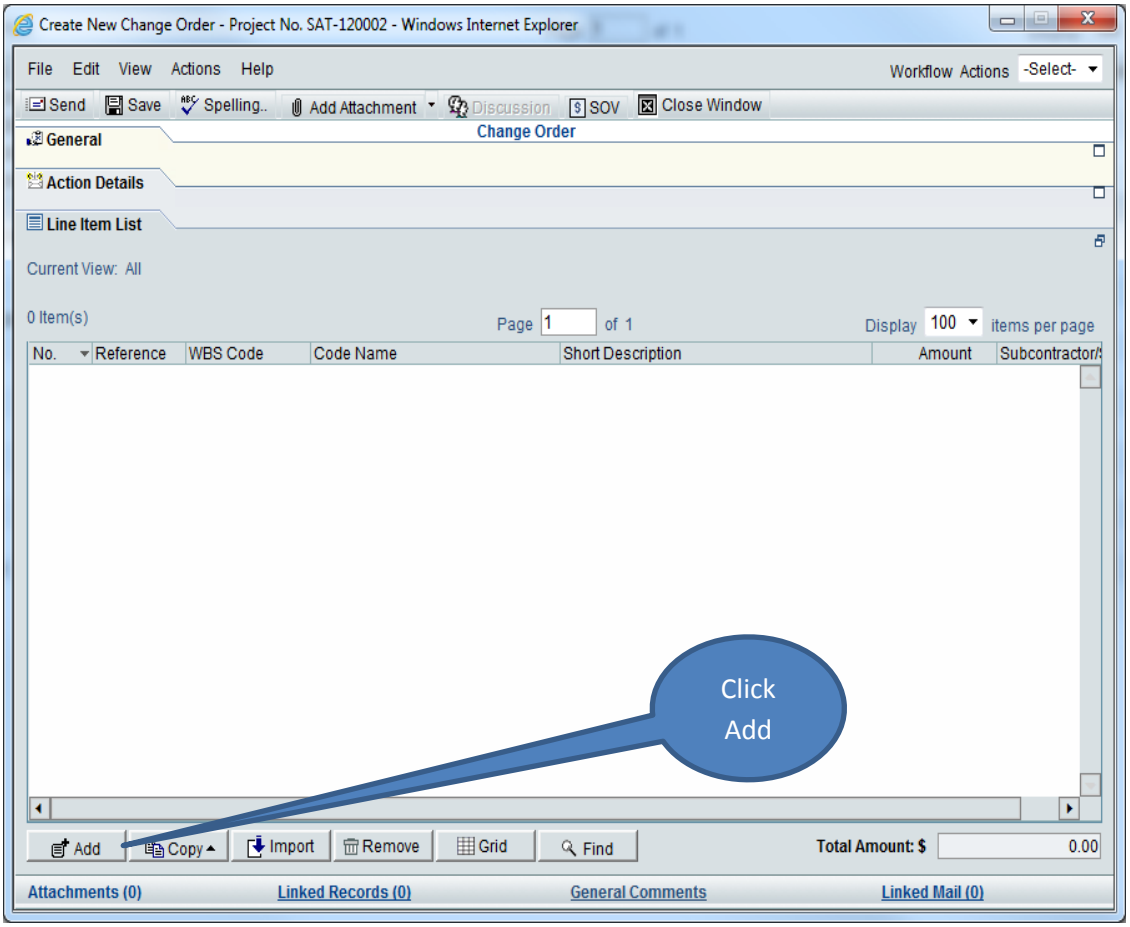


A. Select the Contract. Once Contract is selected, many fields will auto populate. Complete all open fields, * are mandatory.

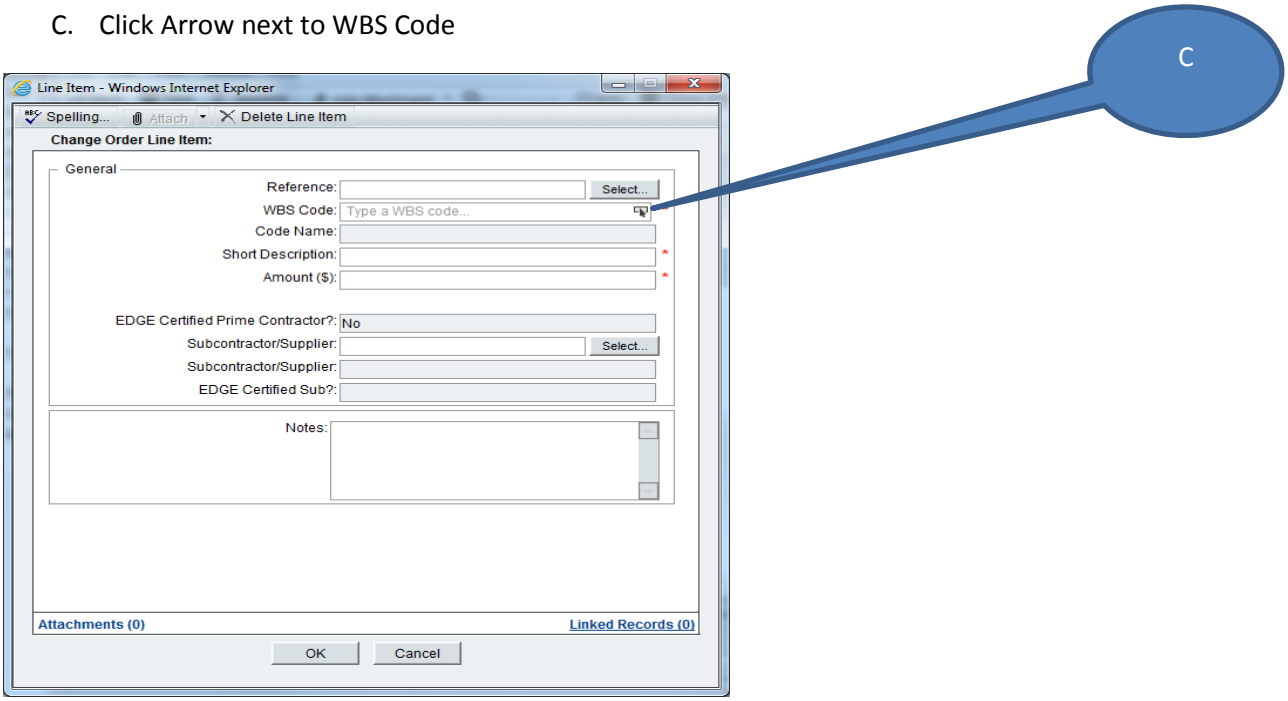


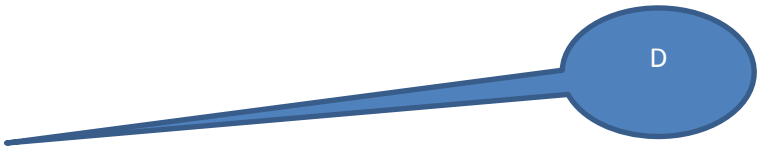
B. Click the Line Item List tab



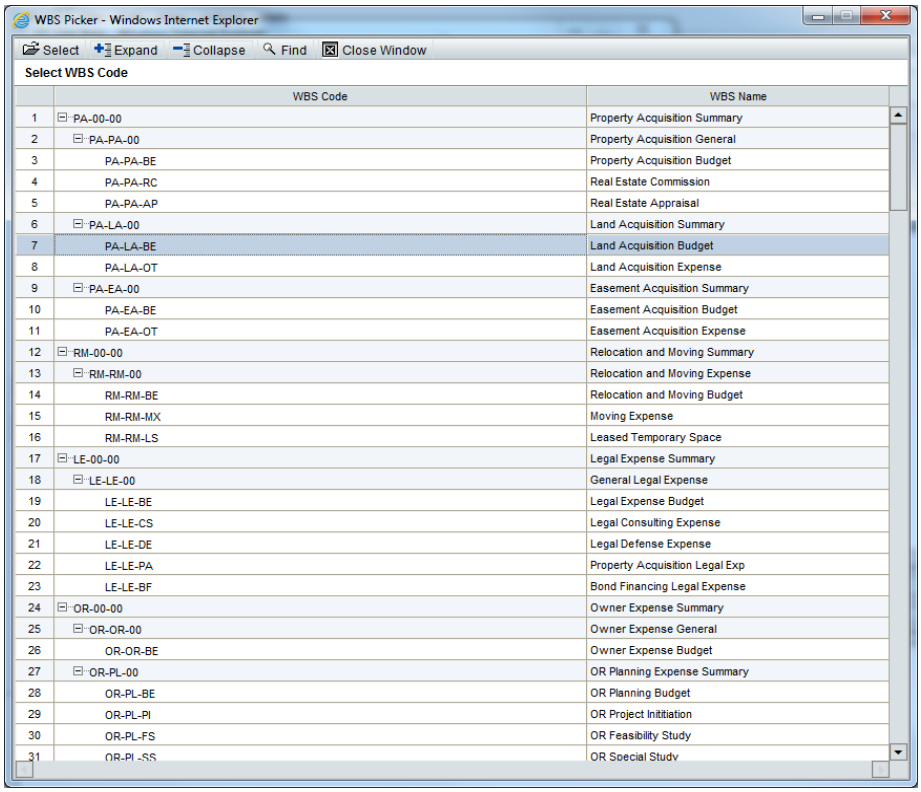


C. Click Arrow next to WBS Code



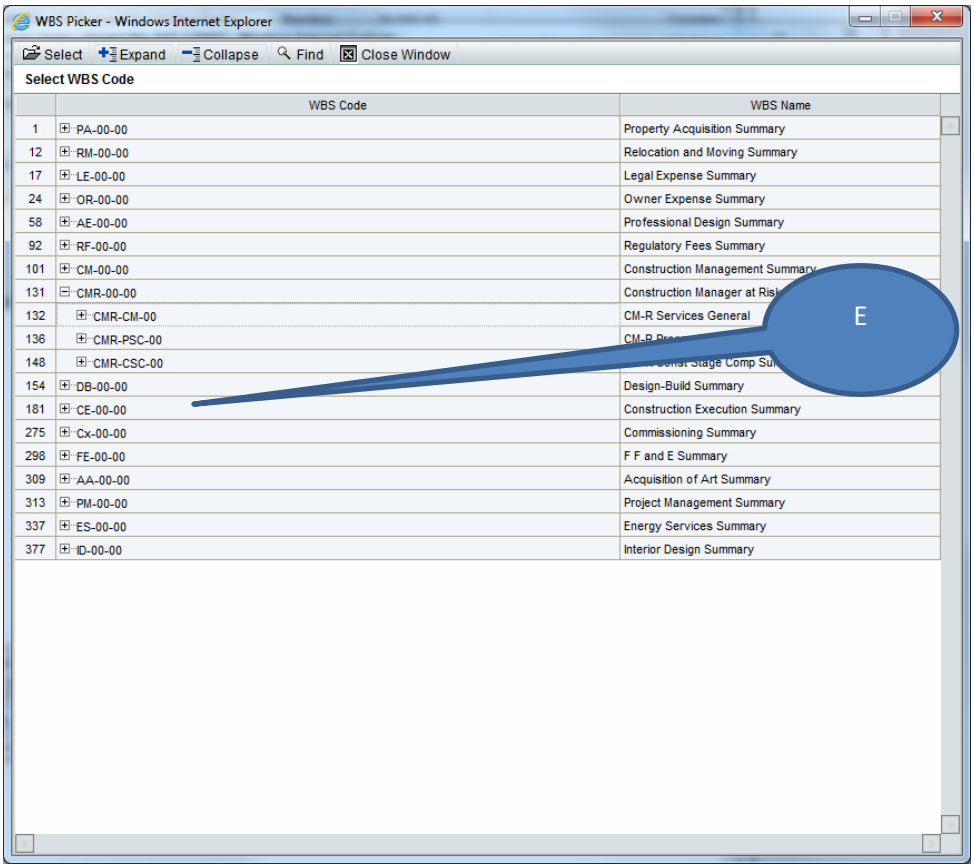


D. **Collapse** Screen

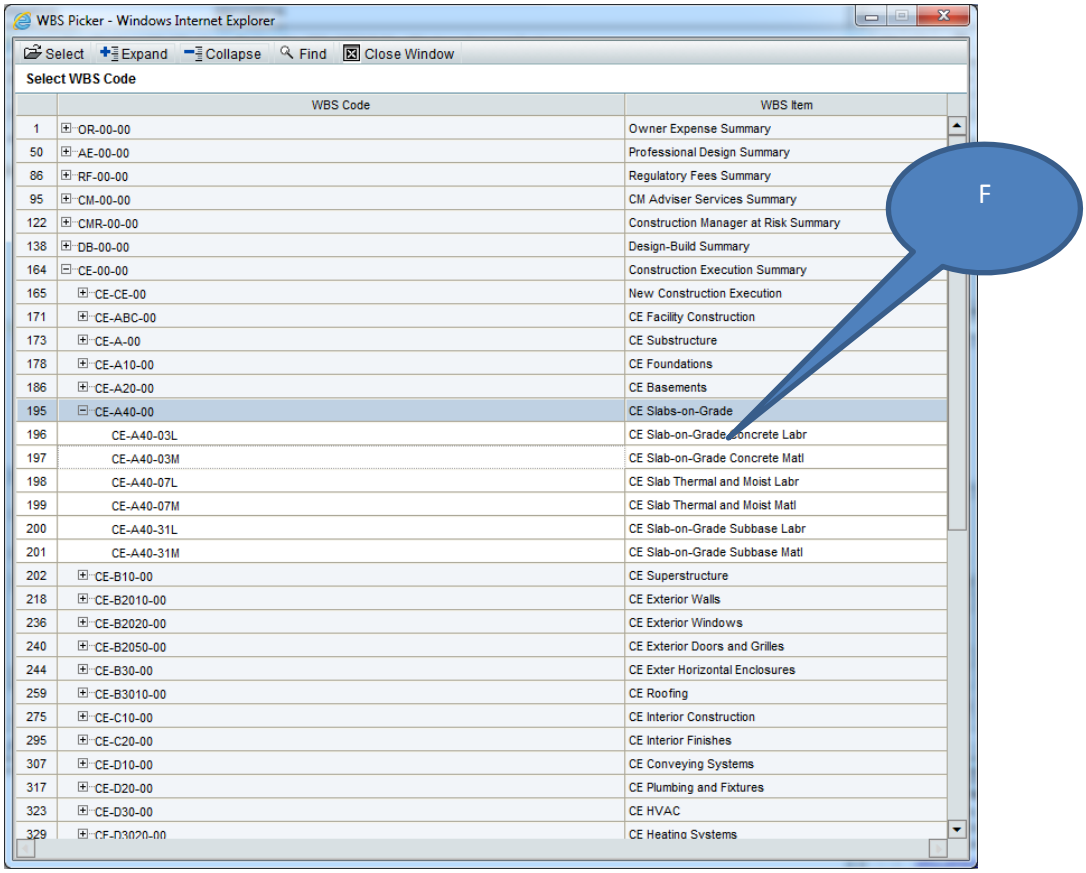


	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
2	PA-PA-00	Property Acquisition General
3	PA-PA-BE	Property Acquisition Budget
4	PA-PA-RC	Real Estate Commission
5	PA-PA-AP	Real Estate Appraisal
6	PA-LA-00	Land Acquisition Summary
7	PA-LA-BE	Land Acquisition Budget
8	PA-LA-OT	Land Acquisition Expense
9	PA-EA-00	Easement Acquisition Summary
10	PA-EA-BE	Easement Acquisition Budget
11	PA-EA-OT	Easement Acquisition Expense
12	RM-00-00	Relocation and Moving Summary
13	RM-RM-00	Relocation and Moving Expense
14	RM-RM-BE	Relocation and Moving Budget
15	RM-RM-MX	Moving Expense
16	RM-RM-LS	Leased Temporary Space
17	LE-00-00	Legal Expense Summary
18	LE-LE-00	General Legal Expense
19	LE-LE-BE	Legal Expense Budget
20	LE-LE-CS	Legal Consulting Expense
21	LE-LE-DE	Legal Defense Expense
22	LE-LE-PA	Property Acquisition Legal Exp
23	LE-LE-BF	Bond Financing Legal Expense
24	OR-00-00	Owner Expense Summary
25	OR-OR-00	Owner Expense General
26	OR-OR-BE	Owner Expense Budget
27	OR-PL-00	OR Planning Expense Summary
28	OR-PL-BE	OR Planning Budget
29	OR-PL-PI	OR Project Initiation
30	OR-PL-FS	OR Feasibility Study
31	OR-PL-SS	OR Special Study

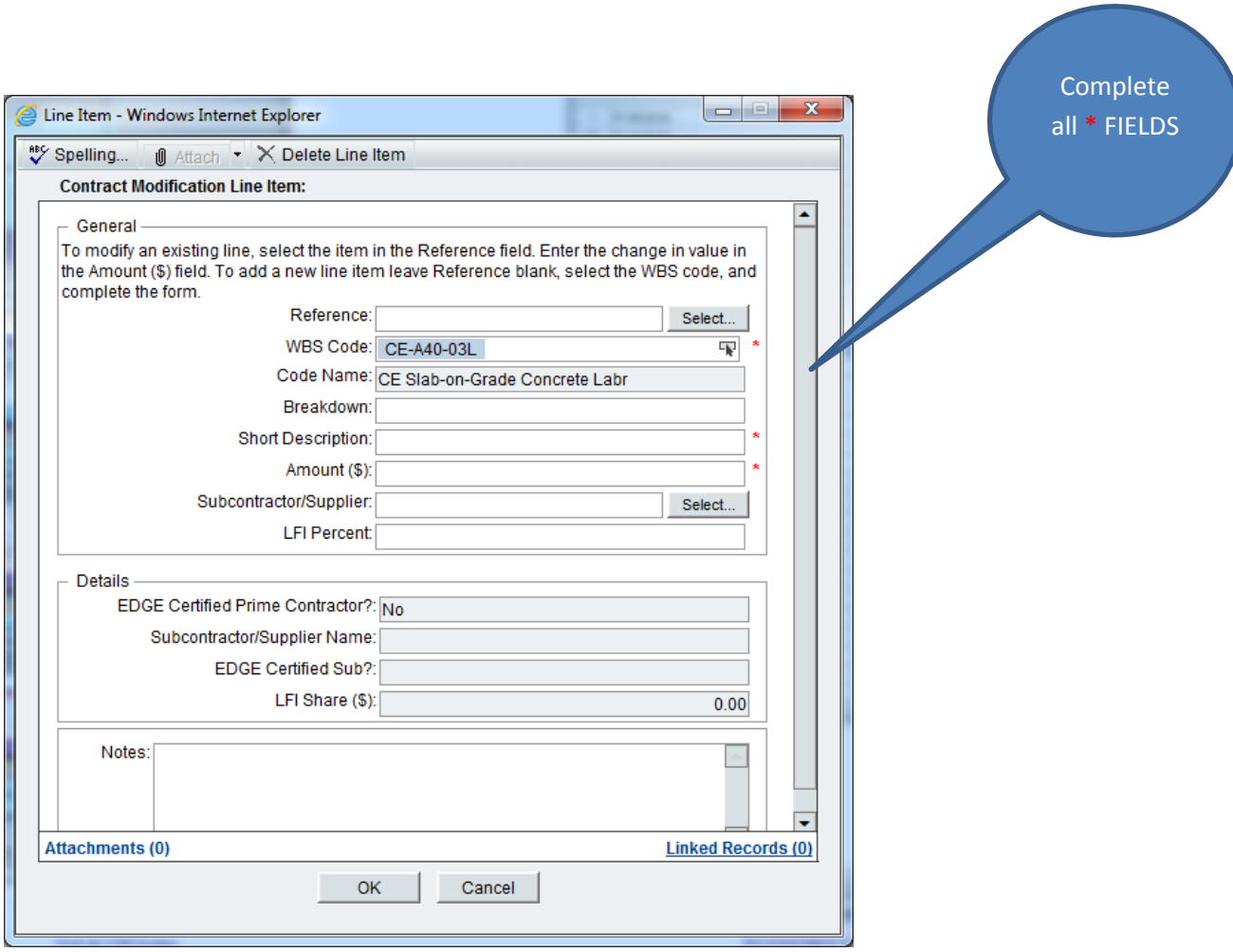
E. Choose the appropriate code (Review WBS codes to make appropriate code selection)



	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
58	AE-00-00	Professional Design Summary
92	RF-00-00	Regulatory Fees Summary
101	CM-00-00	Construction Management Summary
131	CMR-00-00	Construction Manager at Risk
132	CMR-CM-00	CM-R Services General
136	CMR-PSC-00	CM-R Pre-
148	CMR-CSC-00	Const Stage Comp Su
154	DB-00-00	Design-Build Summary
181	CE-00-00	Construction Execution Summary
275	Cx-00-00	Commissioning Summary
298	FE-00-00	F F and E Summary
309	AA-00-00	Acquisition of Art Summary
313	PM-00-00	Project Management Summary
337	ES-00-00	Energy Services Summary
377	ID-00-00	Interior Design Summary



	WBS Code	WBS Item
1	OR-00-00	Owner Expense Summary
50	AE-00-00	Professional Design Summary
86	RF-00-00	Regulatory Fees Summary
95	CM-00-00	CM Adviser Services Summary
122	CMR-00-00	Construction Manager at Risk Summary
138	DB-00-00	Design-Build Summary
164	CE-00-00	Construction Execution Summary
165	CE-CE-00	New Construction Execution
171	CE-ABC-00	CE Facility Construction
173	CE-A-00	CE Substructure
178	CE-A10-00	CE Foundations
186	CE-A20-00	CE Basements
195	CE-A40-00	CE Slabs-on-Grade
196	CE-A40-03L	CE Slab-on-Grade Concrete Labr
197	CE-A40-03M	CE Slab-on-Grade Concrete Matl
198	CE-A40-07L	CE Slab Thermal and Moist Labr
199	CE-A40-07M	CE Slab Thermal and Moist Matl
200	CE-A40-31L	CE Slab-on-Grade Subbase Labr
201	CE-A40-31M	CE Slab-on-Grade Subbase Matl
202	CE-B10-00	CE Superstructure
218	CE-B2010-00	CE Exterior Walls
236	CE-B2020-00	CE Exterior Windows
240	CE-B2050-00	CE Exterior Doors and Grilles
244	CE-B30-00	CE Exter Horizontal Enclosures
259	CE-B3010-00	CE Roofing
275	CE-C10-00	CE Interior Construction
295	CE-C20-00	CE Interior Finishes
307	CE-D10-00	CE Conveying Systems
317	CE-D20-00	CE Plumbing and Fixtures
323	CE-D30-00	CE HVAC
329	CE-D3020-00	CE Heating Systems


Complete all * FIELDS
Line Item - Windows Internet Explorer
Spelling...
Attach
Delete Line Item
Contract Modification Line Item:
General
To modify an existing line, select the item in the Reference field. Enter the change in value in the Amount ($) field. To add a new line item leave Reference blank, select the WBS code, and complete the form.
Reference:
Select...
WBS Code:
CE-A40-03L
Code Name:
CE Slab-on-Grade Concrete Labr
Breakdown:
Short Description:
Amount ($):
Subcontractor/Supplier:
Select...
LFI Percent:
Details
EDGE Certified Prime Contractor?:
No
Subcontractor/Supplier Name:
EDGE Certified Sub?:
LFI Share ($):
0.00
Notes:
Attachments (0)
Linked Records (0)
OK
Cancel

Sample of completed lower form.

Contract Modification - GMP Amendment - Project No. SFC-130319.01 - Windows Internet Explorer

File Edit View Actions Help

Save Spelling.. Add Attachment SOV Close Window

General

Contract Modification

Task Details

Line Item List

Current View: All

Show Currency in: Transaction Currency

28 Item(s)

Page 1 of 1

Display 100 items per page

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/S
003	0	OR-CF-CM	CM at Risk Contingency	CM's Contingency	266,017.00	
001	0	CMR-CSC-PXS	CM-R Const Personnel Expense	Construction Stage Personnel Cost	321,155.00	
004	0	CMR-CSC-CFS	CM-R Construction Stage Fee	CM's Fee	182,665.00	
023	0	CE-Z10-BE	CE General Conditions Budget	General Trades	497,047.00	
006	0	CE-G3010-BE	CE Water Utilities Budget	Waste Water Treatment Plant	256,582.00	
024	0	CE-G-BE	CE Sitework Budget	Sitework and Utilities	553,092.00	
005	0	CE-E2050-BE	CE Movable Furnishings Budget	Loose Furnishings	150,000.00	
014	0	CE-E2013-BE	CE Casework Budget	Casework	375,292.00	
013	0	CE-E1038-BE	CE Foodservice Equipment Budget	Kitchen Equipment	311,978.00	
007	0	CE-D60-BE	CE Technology Budget	Technology	763,376.00	
008	0	CE-D50-BE	CE Electrical Budget	Electrical	867,522.00	
027	0	CE-D50-BE	CE Electrical Budget	Temp Electric-Bill Spade Electric	34,992.00	
012	0	CE-D40-BE	CE Fire Protection Budget	Fire Protection	208,586.00	
009	0	CE-D30-BE	CE HVAC Budget	HVAC Controls	198,115.00	
010	0	CE-D30-BE	CE HVAC Budget	HVAC	1,208,034.00	
011	0	CE-D20-BE	CE Plumbing and Fixtures Budget	Plumbing	468,653.00	
002	0	CE-CE-GC	General Conditions Allowance	General Condition Costs	103,314.00	
026	0	CE-CE-BE	Construction Execution Budget	Selective Demolition	213,532.00	
028	0	CE-C10-BE	CE Interior Construction Budget	Ceiling Demolition-Alpha & Omega	17,867.00	

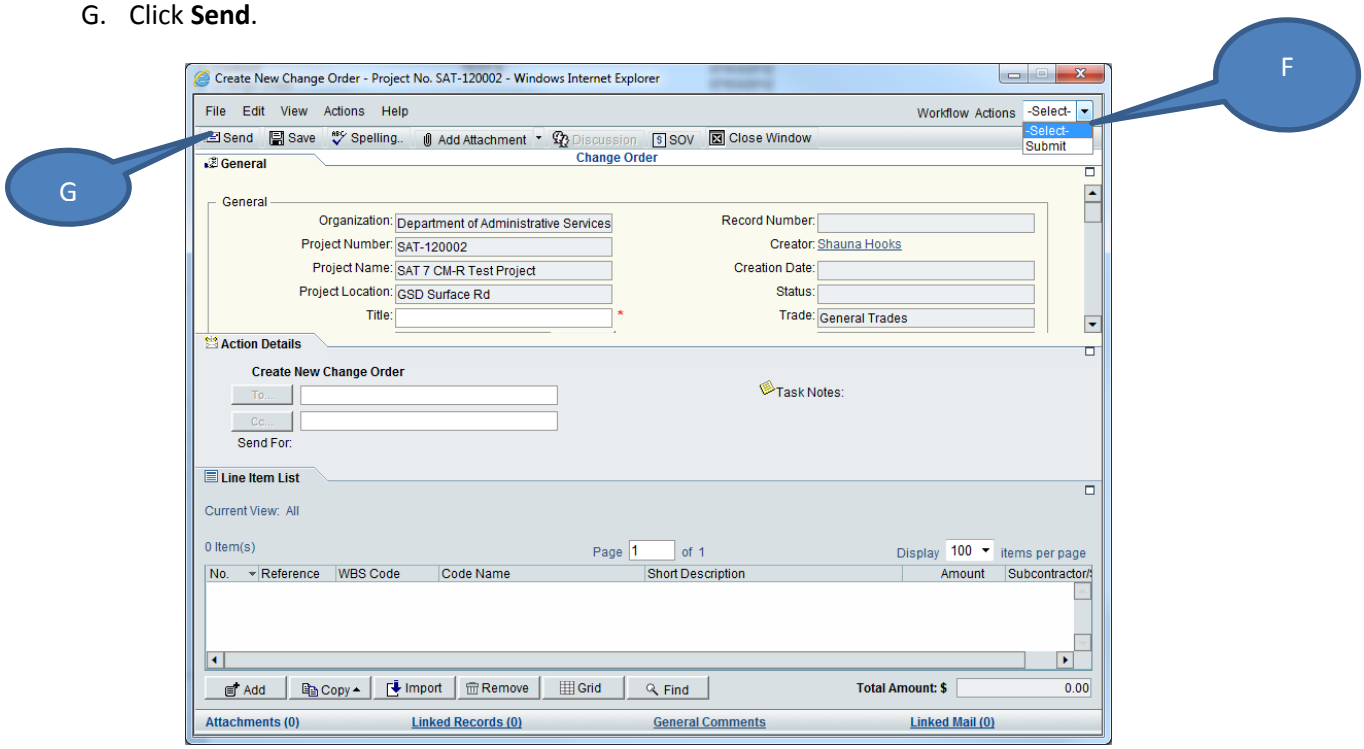
Grid Find

Total Amount: $ 9,315,929.00

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

F. 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**.

G. Click **Send**.



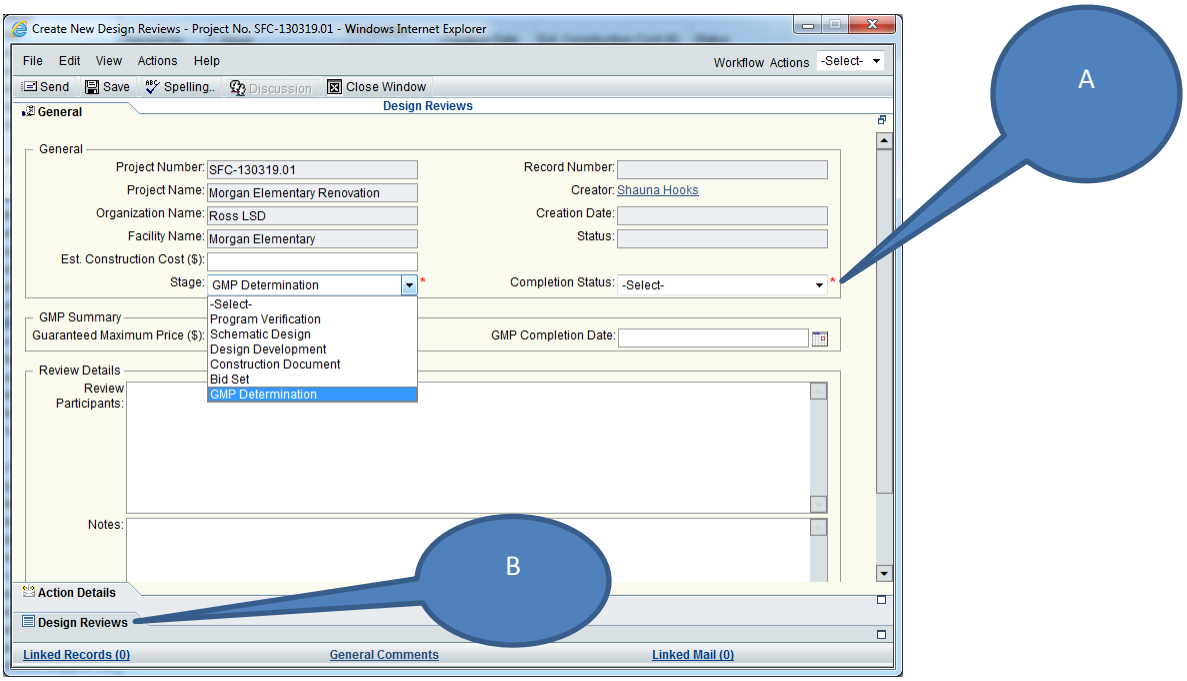
Along with a GMP Amendment the supporting documentation for the Subcontracted Work must be populated into a Design Review record.

Design Review:

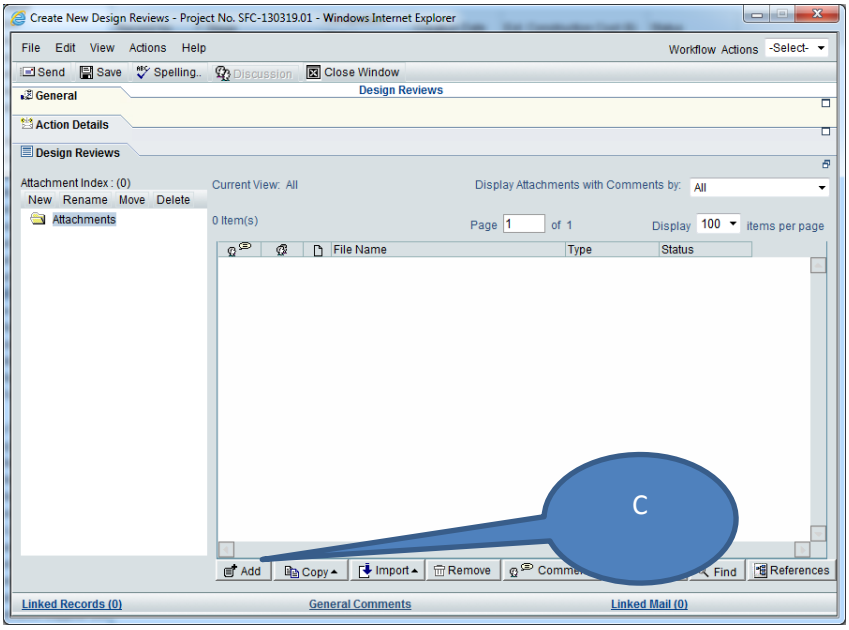
Note: Upload all supporting documentation into Document Manager, once upload is complete:

Go to Logs
Click Design Review
Click New at the top of your screen

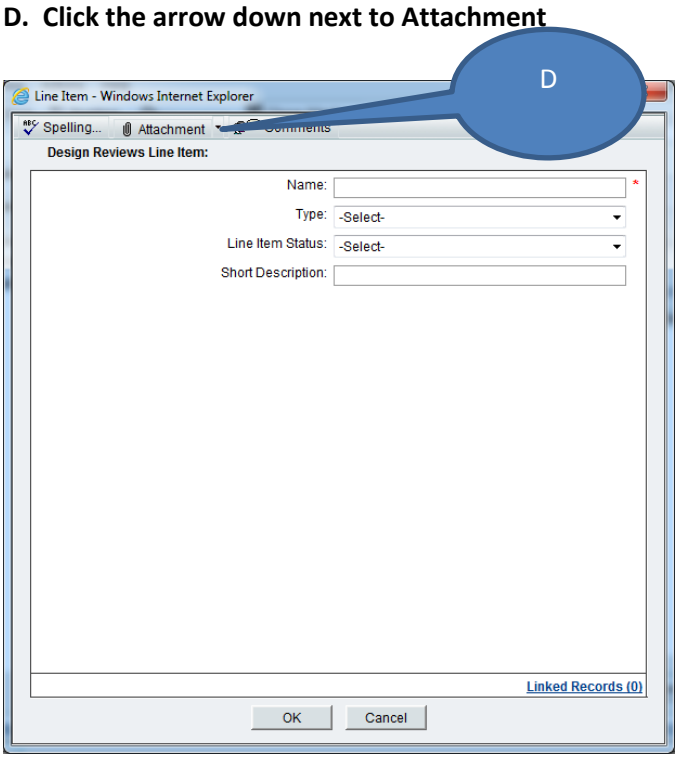
A. **Complete all open areas in the form, all * are mandatory fields.**
B. **To attach the supporting documents click the Design Reviews tab**



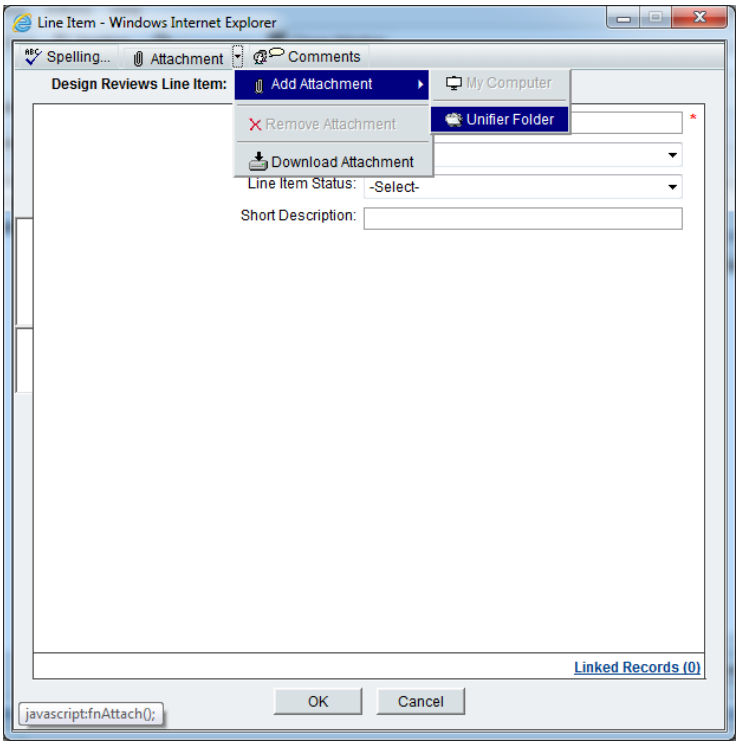
C. **Click Add**



D. Click the arrow down next to Attachment

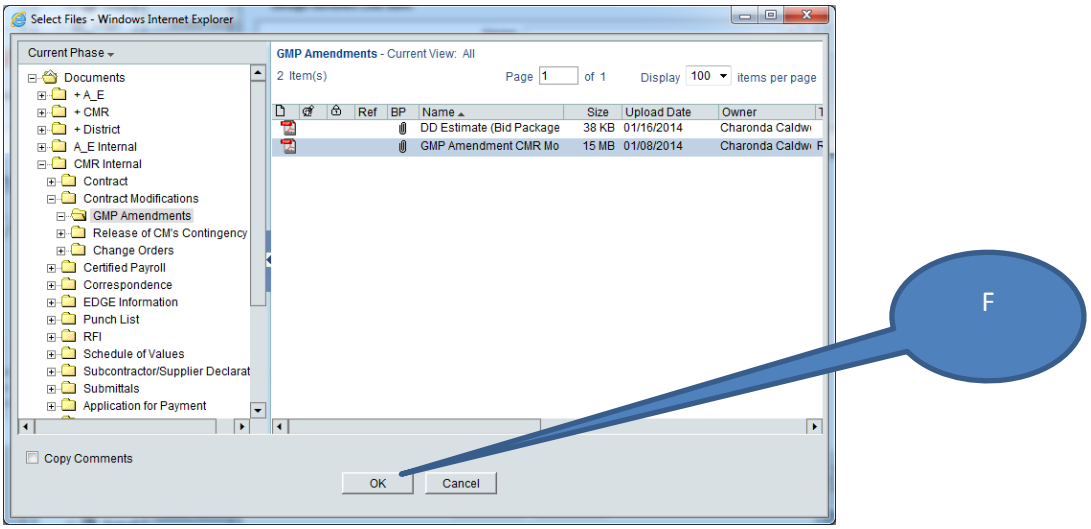


E. Hover your mouse over Add Attachment; click Unifier Folder. This will take you back to Document Manager; choose the folder where you housed your supporting documents.



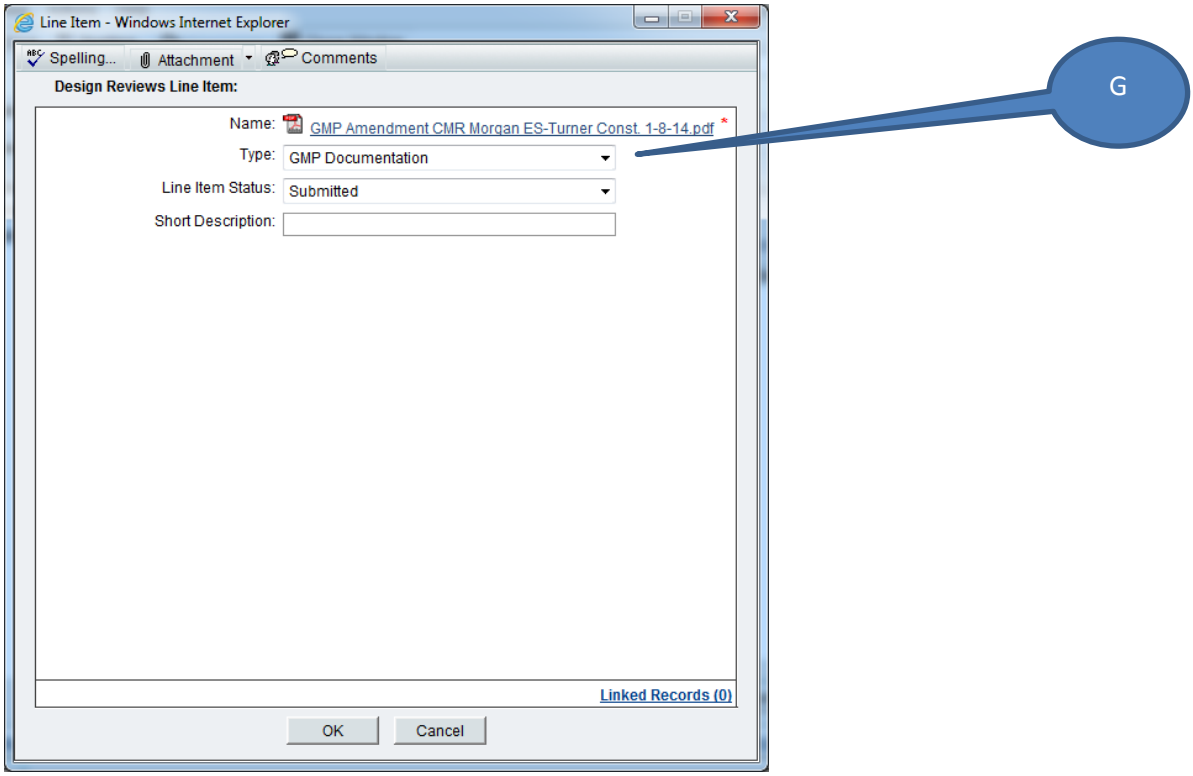
F. Highlight the document you wish to upload

- Click Ok

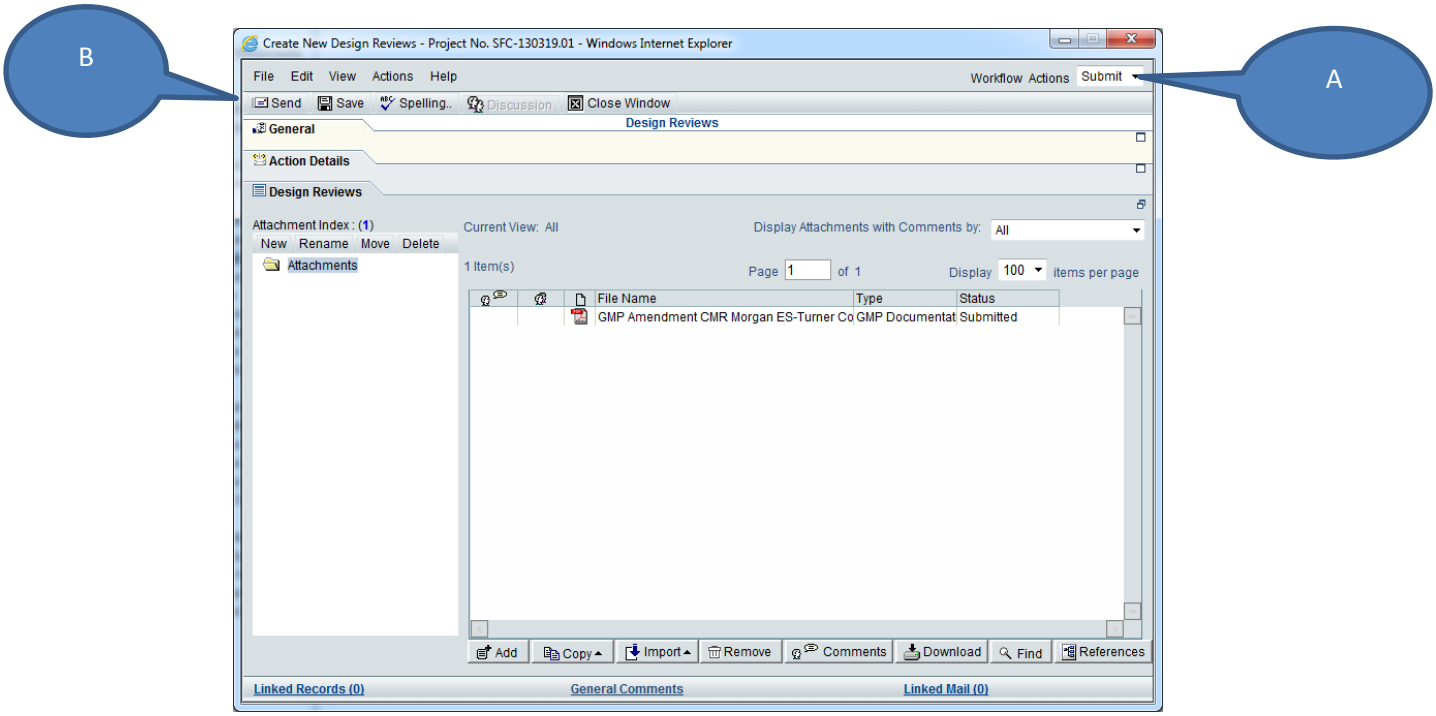


G. Complete the appropriate fields

-Click OK



Repeat until all lines have been added.

Choose the Workflow Action: **Submit**

Click **Send**