



# CMR Process

## Agency/Higher Ed

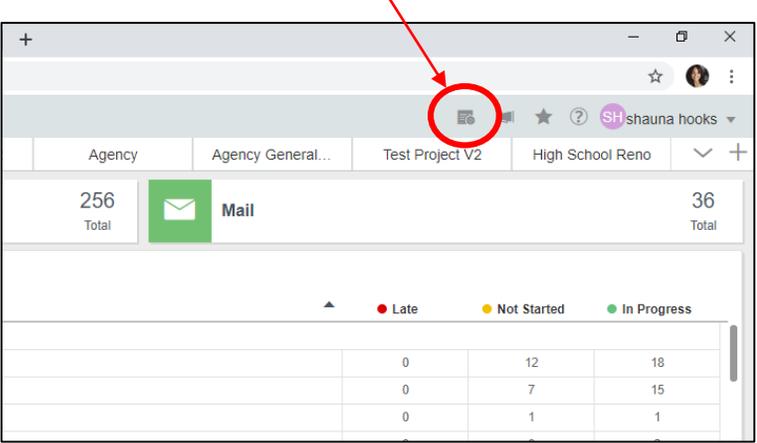


# Important Notice – Standard View Document

This document contains screenshots of OAKS CI in Standard View. By default, OAKS CI will open in the New UI View. In order to properly follow the instructions in this document, please ensure the environment is set to Standard View.

Currently you can switch between views with the button near the top right of your OAKS CI screen. When clicked, your view will toggle between the **Standard View** and **New UI View**.

Not every page will look different when you change views. Look at the color of the button to determine which view you are currently in:



If the button is gray, the **Standard View** is being displayed



If the button is blue, the **New UI View** is being displayed



# OAKS CI Training and Support

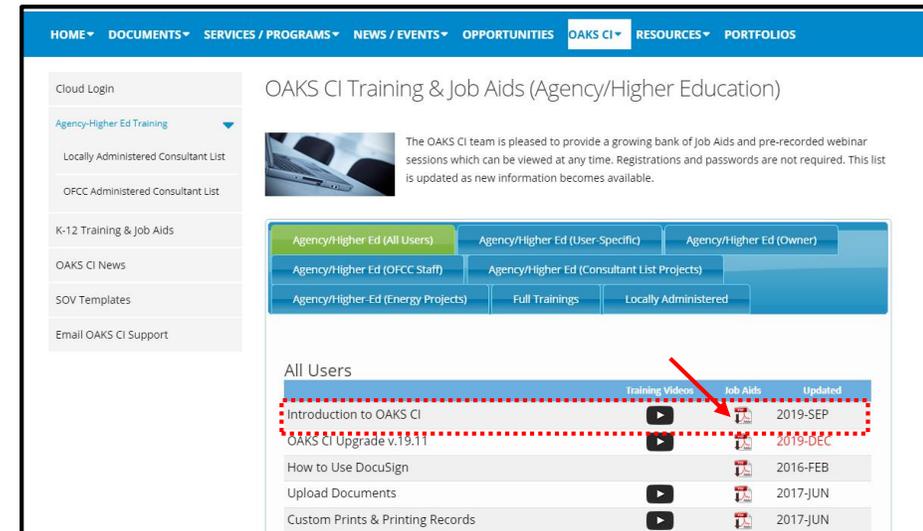
To view additional job aids and training materials for OAKS CI:

1. Navigate to [ofcc.ohio.gov](http://ofcc.ohio.gov)
2. Mouse over the OAKS CI tab
3. Click Agency/Higher Ed Training



Before proceeding through this training document, it is recommended you view the [Introduction to OAKS CI](#) job aid.

For additional help, please contact the OAKS CI Support Desk - [oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)



# Navigation

At the bottom-right of each slide is a text link that lists the section and subsection of your location in the document. The example to the right is taken from the Create step of the Professional Services Agreement. Clicking the link will take you to the beginning of the Professional Services Agreement section.



The Home icon will always take you directly back to the table of contents.

Some slides describe a workflow with boxes representing each step. On these slides you can click the boxes to navigate directly to that step in the job aid.



You will also see text links that will either take you to another slide, or directly to another document. The [Topics](#) slide contains links to each major section.



# Topics

## Slide

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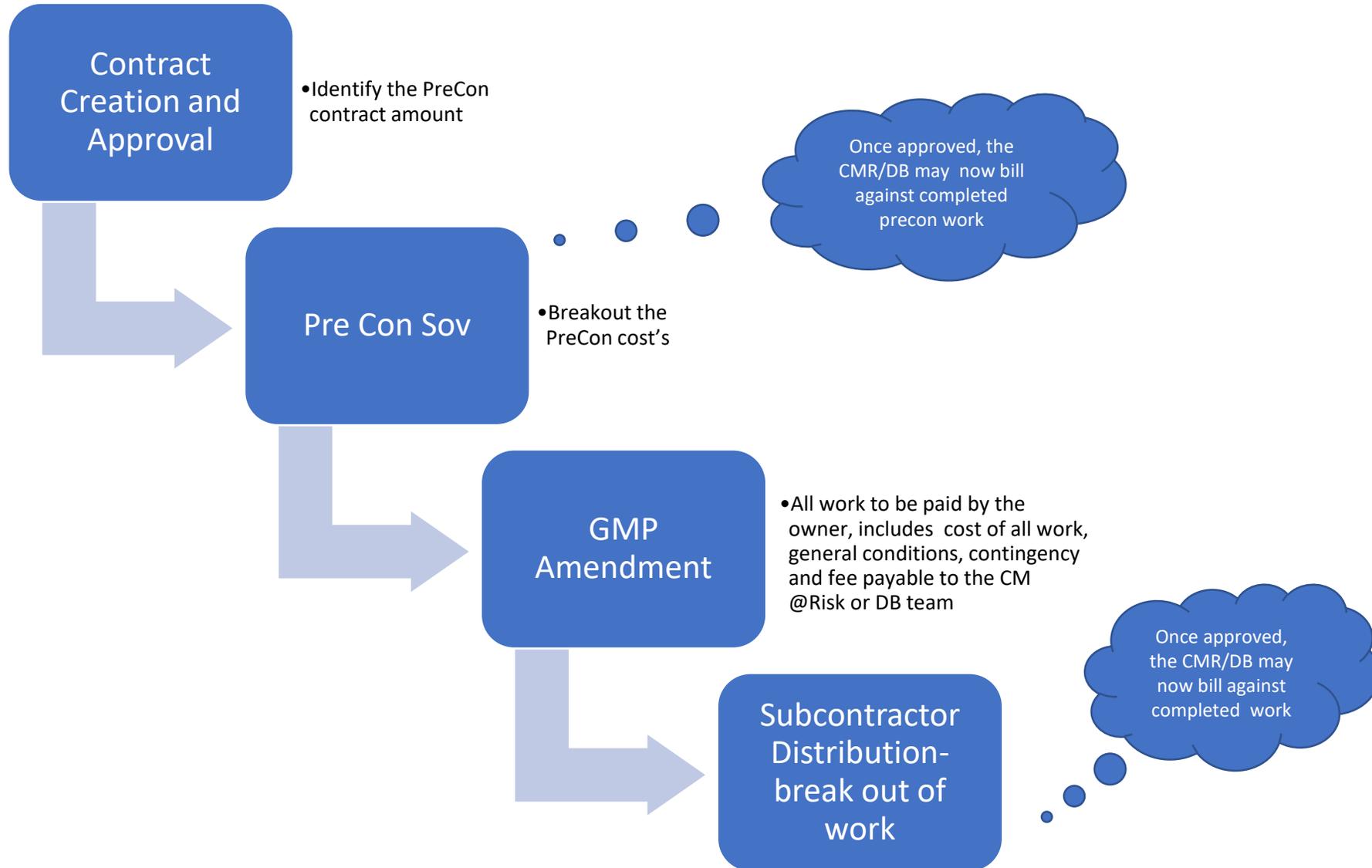
80

Questions/Contact

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# CMR Contract Process flow



# Create the Pre Con Contract SOV

- The purpose of the Pre-Con Sov is to identify Pre Con services. If an EDGE Certified Subcontractor/Consultant is providing any of your Pre Con services, a Subcontractor Supplier Declaration must be created and approved prior to the creation of the SOV.



# Subcontractor/Supplier Declarations



# Purpose & Procedure

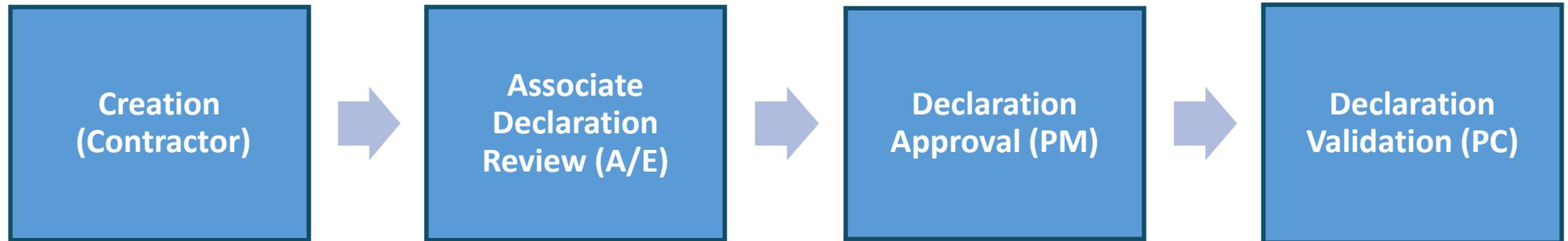
- ▶ The Subcontractor Supplier Declaration Business Process (BP):
  - ▶ Provides for the submittal, review, and approval of contractor's subcontractors and material suppliers
  - ▶ Tracks important EDGE and subcontractor information once a subcontractor/supplier is approved



# Subcontractor/Supplier Declarations

## Workflow Steps:

*Click the boxes to navigate  
directly to each section*



# Create SMSD



# SMSD Initiation (Contractor)

## ▶ Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar shows the user ID "uuuu600419530". The page has a navigation bar with several tabs, including "Agency General...". A search bar is visible with the text "DPS-1" entered. Below the search bar is a table of search results with the following columns: Name, Number, and Location.

Name	Number	Location
Ohio State Highway Patrol Post 44	DPS:080001	/Agency/Department of Public Safety
OSHP Post 23 LEADS Building	DPS:110001	/Agency/Department of Public Safety
DPS ACF Standing Seam Roof Renovation	DPS:110003	/Agency/Department of Public Safety
LEADS Data Center Alum Creek Facility	DPS:110006	/Agency/Department of Public Safety
OSHP Academy Range Equip. Replacement	DPS:110009	/Agency/Department of Public Safety
ODPS - EOC Reorganization	DPS:110010	/Agency/Department of Public Safety
OSHP Academy Maintenance & Repair Project	DPS:120001	/Agency/Department of Public Safety
OSHP Alum Creek Crime Lab Addition	DPS:120002	/Agency/Department of Public Safety
Academy HVAC Replacement-Chiller & Range ...	DPS:120004.02	/Agency/Department of Public Safety
Alum Creek HVAC	DPS:130001	/Agency/Department of Public Safety



# SMSD Initiation (Contractor)

- ▶ To create the Contract record in OAKS CI navigate to:
  - ▶ Logs -> Subcontractor/Supplier Declaration
  - ▶ Click Create or New

The screenshot displays the Oracle Primavera Unifier (Test) interface. The top navigation bar includes 'Company Work...', 'OAKS CI Traini...', 'OAKS CI Distric...', and 'Oak'. The left sidebar menu lists various document types, with 'Subcontractor/Supplier Declaration' highlighted in red and a red arrow pointing to it. The main content area shows the 'Subcontractor/Supplier Declaration' screen for 'Agency > OAKS CI Training > OAKS'. A red circle highlights the '+ Create' button. Below the button is a table with columns for 'Subcontractor/Supplier' and a list of entries including 'aadv', 'ABC', 'ABC Consulting', 'ABC Mechanical', 'ABC Tool Company', 'Acme Supply', 'aec', 'Ben & Jerry', 'Ben & Jerry Acme', 'Ben & Jerry Concrete', 'Ben & Jerry Concrete Co', 'BEN & JERRY CONCRETE C', 'Ben & Jerry Concrete Co.', 'Ben & Jerry Concrete Co.', 'Ben & Jerry's', 'Ben & Jerry's', 'Ben & Jerry's ACME', 'Ben & Jerry's ACME', and 'Ben & Jerr's Concrete'. The bottom right corner of the table area shows 'Total: 373'.



# Create SMSD (Contractor)

## a) Complete the General section

- ▶ The fields marked with a red \* are required
- ▶ The **Title** should house the name of the company utilized

## b) Click the Select button next to Contract Name

## c) Choose the appropriate contract from the list

## d) Click Select

Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1006/3100?\_uref=uuu963646774t2

### Create New Subcontractor/Supplier Declaration

Send Save

**General**

NOTE: Only select either Contract Name or Professional Services Agreement Name.  
Tier1 Subcontractor Documentation must be attached as soon as it is available.

Organization: Department of Administrative Services

Project Number: OCI-080001

Project Name: OAKS CI Training 1

Project Location: Surface Road

Record Number

Creation Date

Creator: Matthew Weber

Status

Title \*  
OAKS Plumbing 0012

Contract Name \*  
mmw-contract test

Contract

No.	Contractor Name	Original Contract Completion
12001	Sands Decker Ltd.	Class-0001 09/14/2013 10:00...
DAS-0006	Random Roofing and Repair	Class-0001 03/04/2013 08:00...
Contractor Test A	Sands Decker Ltd.	07/03/2015 05:00...
412361	OAKS Plumbing	Stored Mat Test 1 10/03/2020 05:00...
22-22222	Sands Decker Ltd.	Franklin Peet 03/20/2020 05:00...
15	OAKS Plumbing	mmw-contract test 03/20/2020 05:00...
070916	Sands Decker Ltd.	Contract v1.3 Test

Total: 24

Cancel Select



# Create SMSD (Contractor)

- e) Scroll down the form to complete the Declaration Information block

e

Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1006/3100?\_uref=uuu963646774t2

### Create New Subcontractor/Supplier Declaration

Send Save

General

**Declaration Information**

Type \*  
Consultant

Tier 1 \*  
Yes

Subcontractor/Supplier \*  
OAKS Plumbing

Subcontracted by:

Federal Tax ID \*  
99-9999999

Primary Officer 1 \*  
Matt Weber

Address Line 1 \*  
30 W Spring St

Address Line 2

City \*  
Columbus

State \*  
Ohio

ZIP \*  
43215

Contact Person \*  
Matt Weber

Phone No. \*  
614-555-5555

Fax No. \*  
N/A

E-mail Address \*  
matthew.weber@ofcc.ohio.gov

Attachments Comments

Information  
No Attachments.

# Create SMSD (Contractor)

- f) Scroll down the record and fill out the required and applicable fields in the Additional Details block
- ▶ If EDGE Certified Sub is YES, the EDGE Certification Number must be filled in
- g) When the record is ready to move forward, click **Send**





# A/E Declaration Approval



# A/E Receives an Email

- ▶ Click on the “Unifier Login” button to access the task

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: OAKS CI Training 1**

**Subcontractor/Supplier Declaration SSD-0372 is sent to you for Declaration Approval.**

From : Matthew Weber  
Sent For : Declaration Approval

Source Name : OAKS CI Training 1  
Record No : Subcontractor/Supplier Declaration SSD-0372  
Title : Matt's Subcontractor

**Unifier Login**

For Oracle technical assistance <http://www.oracle.com/us/support>



# A/E Declaration Approval

- ▶ Click Accept Task

The screenshot shows a web browser window with the URL: `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214186?task_id=214186&parent_id=0&viewOnly=0&project_id=1006&model=u...`. The page title is "Subcontractor/Supplier Declaration".

At the top right, there are two buttons: "Accept" and "Decline". The "Accept" button is circled in red, and a red arrow points to it from the right.

The page is divided into two main sections:

- Task Details:**
  - From: Matthew Weber
  - To: Archana Atrey;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consultant Stud...
  - Sent For: Declaration Approval
- General:**

Organization	Department of Administrative Services	Record Number	SSD-0374
Project Number	OCI-080001	Creation Date	07/28/2020 02:37 PM (UTC-8)
Project Name	OAKS CI Training 1	Creator	Matthew Weber
Project Location	Surface Road	Status	Pending
Title	SMSD Matt's Contractor		

On the right side, there is a tabbed interface with "Attachments" selected. Below the tabs, there is an information icon and the text "Information No Attachments."



# A/E Declaration Approval

- ▶ Review the Subcontractor/Supplier Declaration record for completeness and compliance with contract documents
  - ▶ Review the **General** section, then scroll down to review the **Declaration Information** and **Additional Details** sections
  - ▶ Check the record for **Attachments** and **Comments**

Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/216616/undefined/undefined?\_ure

### Subcontractor/Supplier Declaration

General

**General**

Department of Administrative Services	Record Number SSD-0375
Project Number OCI-080001	Creation Date 09/10/2020 09:26 PM (UTC-8)
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Location Surface Road	Status Pending
Title OAKS Plumbing 0012	
Contract Name mmw-contract test	Contractor Name OAKS Plumbing
Professional Services Agreement Name	

Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/216616/undefined/undefined?\_ur

### Subcontractor/Supplier Declaration

General

**Declaration Information**

Type Consultant	Tier 1 Yes
Subcontractor/Supplier OAKS Plumbing	Subcontracted by:
Federal Tax ID 99-99999999	
Primary Officer 1 Matt Weber	
Address Line 1 30 W Spring St	
Address Line 2	
City Columbus	
State Ohio	
ZIP 43215	
Contact Person	

Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/216616/undefined/undefined?\_uref=uuu963646774t2

### Subcontractor/Supplier Declaration

General

Phone No.  
614-555-5555

Fax No.  
N/A

E-mail Address  
matthew.weber@ofcc.ohio.gov

**Attachments** **Comments**

**Additional Details**

Subcontractor/P.O. Date 09/11/2020 05:00 PM (UTC-8)	DFSP Enrolled Yes
Subcontractor/P.O. Amount \$ 43,000.00	EDGE Certified? Yes
Services/Material Brands	EDGE Certification Number 123456789
Services	MBE No
Skilled Trade License No.	

Information  
No Attachments.



# A/E Declaration Approval

- ▶ When the record is ready to move forward, click **Send**

Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/216616/undefined/undefined?\_ref=uuu963646774t2

### Subcontractor/Supplier Declaration

**Send** Save

#### General

Phone No.  
614-555-5555

Fax No.  
N/A

E-mail Address  
matthew.weber@ofcc.ohio.gov

#### Additional Details

Subcontractor/P.O. Date 09/11/2020 05:00 PM (UTC-8)	DFSP Enrolled Yes
Subcontractor/P.O. Amount \$ 43,000.00	EDGE Certified? Yes
Services/Material Brands Services	EDGE Certification Number 123456789
Skilled Trade License No.	MBE No

**Attachments** Comments

No Attachments.



# Send Record (A/E)

- ▶ Select the appropriate Workflow Action

If the record is ready to move forward to the PM for Declaration Approval:

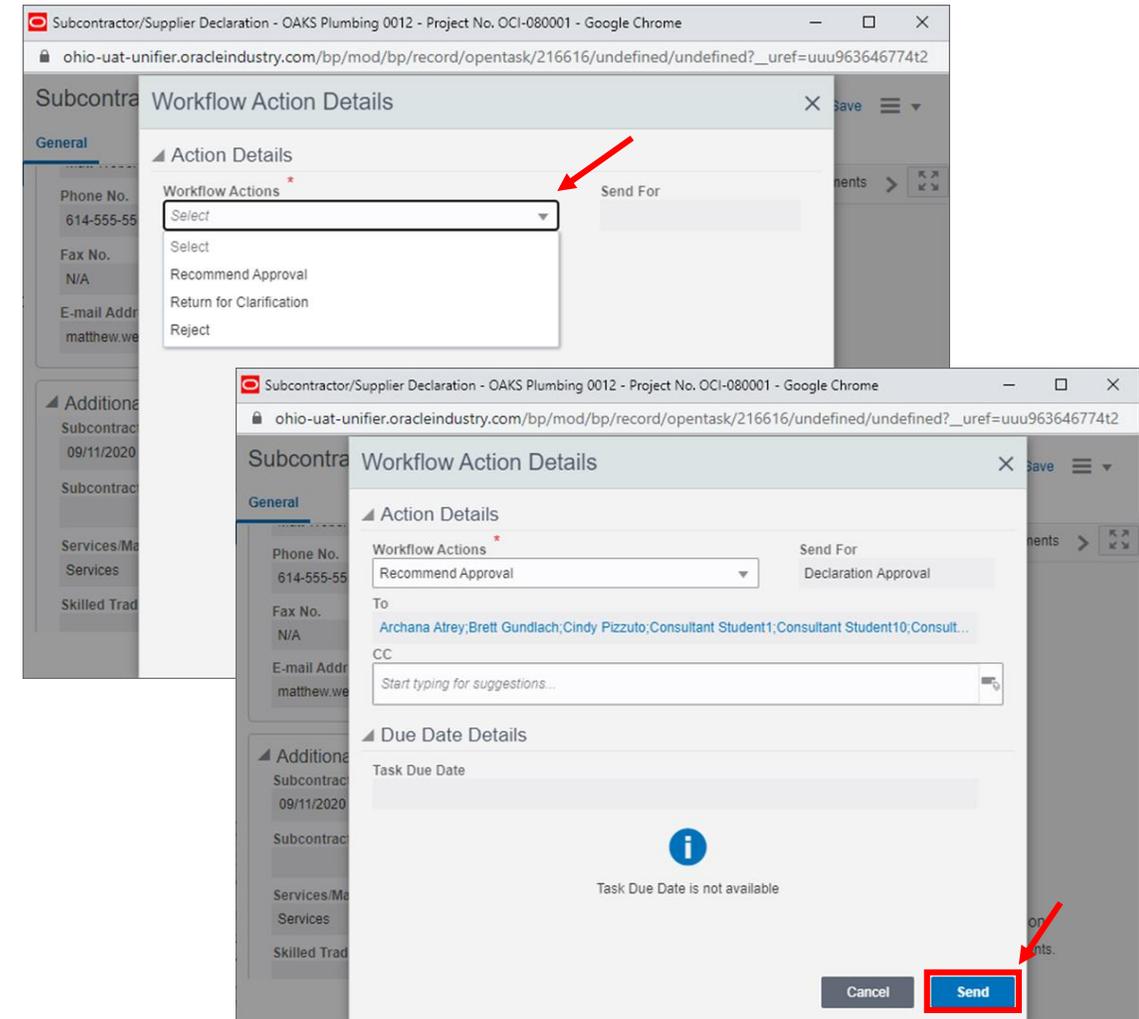
- ▶ Choose **Recommend Approval**
- ▶ Click **Send**

If record must be returned to the Contractor for update:

- ▶ Choose **Return for Clarification**
- ▶ Click **Send**

If record should be terminated and sent to End step:

- ▶ Choose **Reject**
- ▶ Click **Send**



# PM Declaration Approval



# PM Receives an Email

- ▶ Click on the “Unifier Login” button to access the task

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: OAKS CI Training 1**

**Subcontractor/Supplier Declaration SSD-0372 is sent to you for Declaration Approval.**

From : Matthew Weber  
Sent For : Declaration Approval

Source Name : OAKS CI Training 1  
Record No : Subcontractor/Supplier Declaration SSD-0372  
Title : Matt's Subcontractor

**Unifier Login**

For Oracle technical assistance <http://www.oracle.com/us/support>



# PM Declaration Approval

- ▶ Click Accept Task

Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/216659?task\_id=216659&parent\_id=0&viewOnly=0&project\_id=1...

### Subcontractor/Supplier Declaration

[Accept](#) [Decline](#) ☰

**General**

**Task Details**

From: Matthew Weber

To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student 1; Consultant St...

Sent For: Declaration Approval

**General**

Organization	Department of Administrative Services	Record Number	SSD-0375
Project Number	OCI-080001	Creation Date	09/10/2020 09:26 PM (UTC-8) 📅
Project Name	OAKS CI Training 1	Creator	Matthew Weber
Project Location	Surface Road	Status	Pending

**Attachments** | Comments | Linked Records > ⌵

**i**  
Information  
No Attachments.



# PM Declaration Approval

- ▶ Review the Subcontractor/Supplier Declaration record
- ▶ When the record is ready to move forward, click **Send**

Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/216659/undefined/undefined?\_unif=uuu333498495t2

### Subcontractor/Supplier Declaration

[Send](#) [Save](#)

#### General

<b>General</b>	
Organization Department of Administrative Services	Record Number SSD-0375
Project Number OCI-080001	Creation Date 09/10/2020 09:26 PM (UTC-8)
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Location Surface Road	Status Pending
Title OAKS Plumbing 0012	
Contract Name mmw-contract test	Contractor Name OAKS Plumbing
Professional Services Agreement Name	

#### Attachments

Information  
No Attachments.



# PM Declaration Approval

- ▶ Select the appropriate Workflow Action

If the record is ready to move forward to the PC for Declaration Validation:

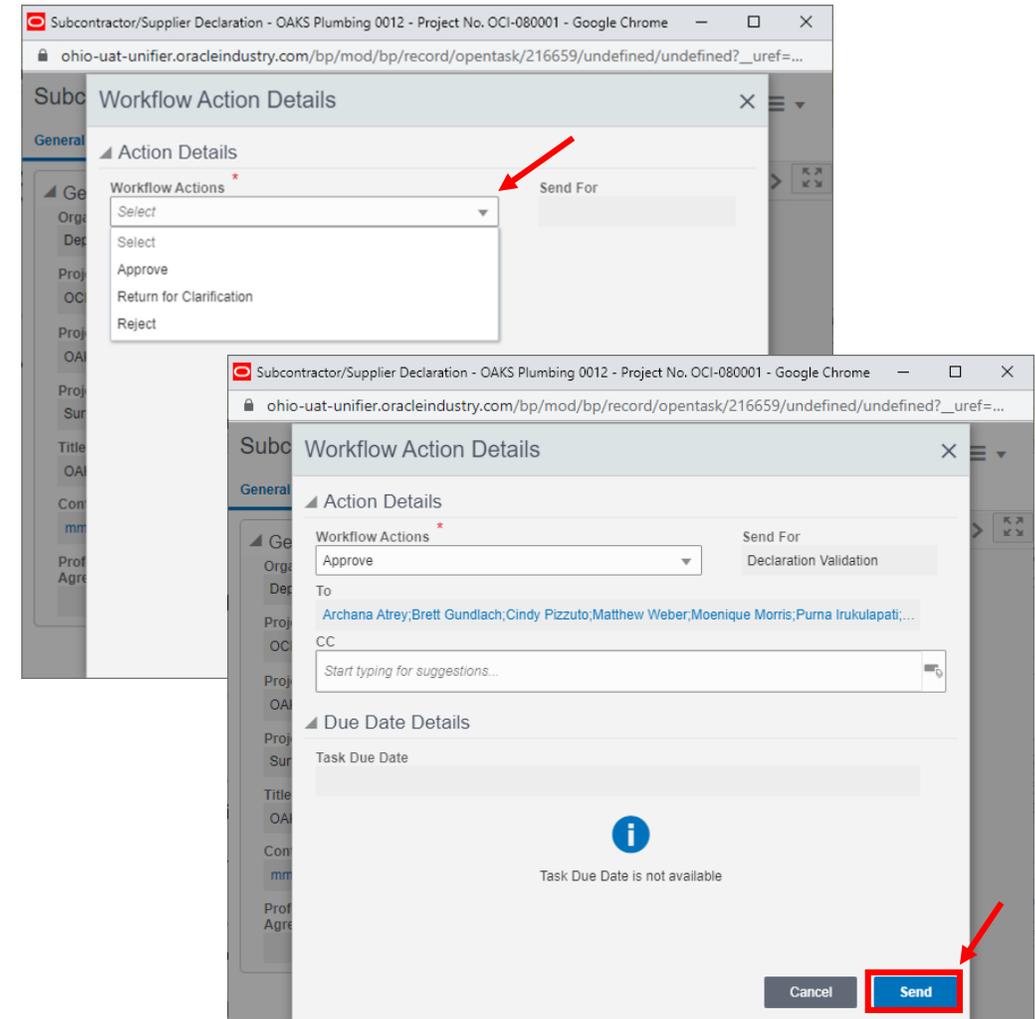
- ▶ Choose **Approve**
- ▶ Click **Send**

If record must be returned to the A/E for update:

- ▶ Choose **Return for Clarification**
- ▶ Click **Send**

If record should be terminated and sent to End step:

- ▶ Choose **Reject**
- ▶ Click **Send**



# PC Validation



# PC Validation Step

- ▶ PC receives an Email
- ▶ Click on the “Unifier Login” button to access the task

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: Agency General Projects Test**

**Contractor Pay Request CPR-0029 is sent to you for PC Review and Validation.**

From : Shauna Hooks  
Sent For : PC Review and Validation

Source Name : Agency General Projects Test  
Record No : Contractor Pay Request CPR-0029  
Title : testshauna

[Unifier Login](#)



# PC Validation Step

- ▶ Click Accept Task

The screenshot shows a web browser window with the following details:

- Browser: Google Chrome
- Page Title: Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001
- URL: ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/216668?task\_id=216668&parent\_id=0&viewOnly=0&projec...
- Page Content: Subcontractor/Supplier Declaration
- Buttons: Accept (circled in red), Decline, and a menu icon.
- Section: General
- Task Details:
  - From: Matthew Weber
  - To: Archana Atrey; Brett Gundlach; Cindy Pizzuto; Matthew Weber; Moenique Morris; Purna Iruku...
  - Sent For: Declaration Validation
- General Information:

Organization	Department of Administrative Services	Record Number	SSD-0375
Project Number	OCI-080001	Creation Date	09/10/2020 09:26 PM (UTC-8)
Project Name	OAKS CI Training 1	Creator	Matthew Weber
Project Location	Surface Road	Status	Pending
Title	OAKS Plumbing 0012		
- Attachments: No Attachments.



# PC Validation Step

- ▶ If this is a Tier 1 Subcontractor attach the subcontractor agreement or return to Contractor for attachment

Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_\_uref=uuu745200052t2

### Subcontractor/Supplier Declaration

Send Save

**General**

Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.

▶ General

▲ Declaration Information

Type	Tier 1
Material Supplier	Yes
Subcontractor/Supplier	Subcontracted by.
Matt's Consultant	
Federal Tax ID	
1234567890	
Primary Officer 1	
Matt's Officer	
Address Line 1	
30 W Spring St	

**Attachments** Comm

Information  
No Attachments.



# PC Validation Step

- ▶ Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.

Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_\_uref=uuu745200052t2

### Subcontractor/Supplier Declaration

Send Save

General

Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.

Attachments

General

Declaration Information

Type	Tier 1
Material Supplier	Yes
Subcontractor/Supplier	Subcontracted by:
Matt's Consultant	
<b>Federal Tax ID</b>	
1234567890	
Primary Officer	
Matt's Officer	
Address Line 1	
30 W Spring St	

Information  
No Attachments.

Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_\_uref=uuu745200052t2

### Subcontractor/Supplier Declaration

Send Save

General

Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier.

Attachments

General

Declaration Information

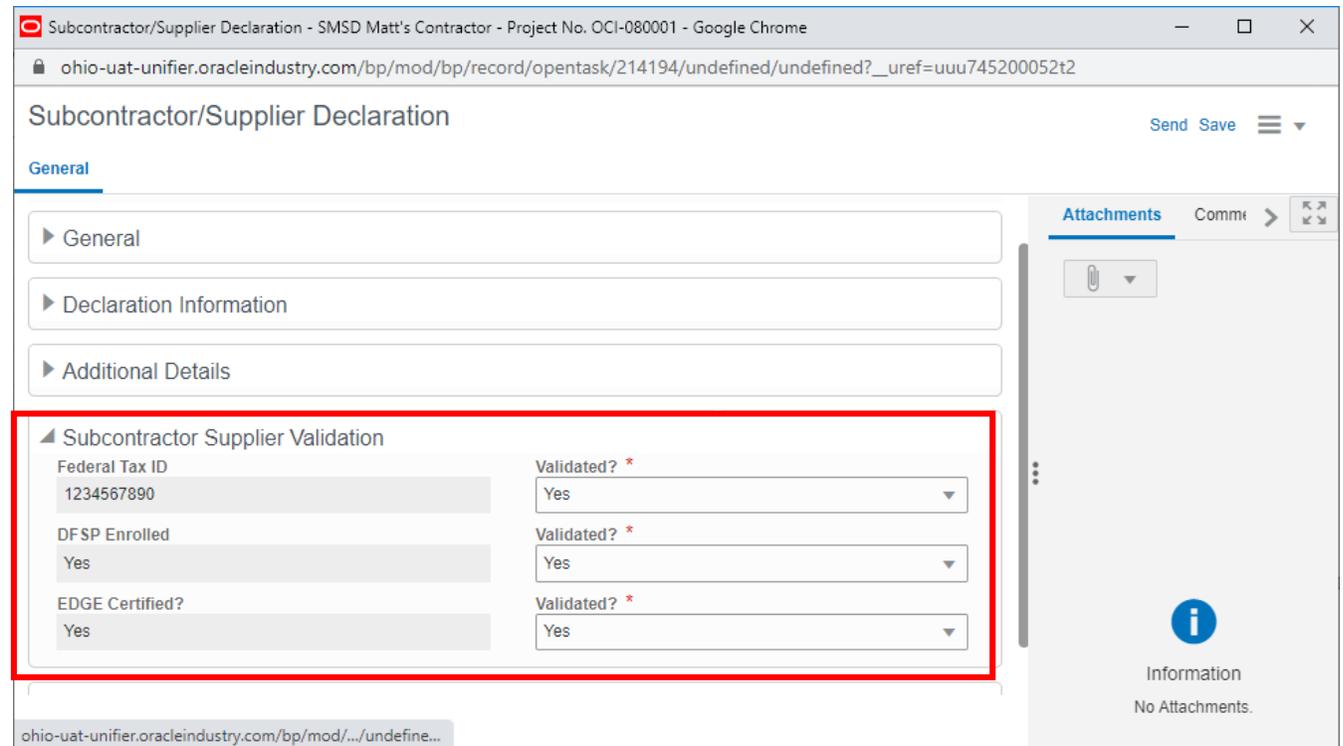
**Additional Details**

Subcontractor/P.O. Date	DFSP Enrolled
	Yes
Subcontractor/P.O. Amount \$	EDGE Certified?
1,000,000.00	Yes
Services/Material Brands	EDGE Certification Number
Concrete	1234567890
Skilled Trade License No.	MBE

Information  
No Attachments.

# PC Validation Step

- ▶ Fill out Subcontractor Supplier Validation required fields



Subcontractor/Supplier Declaration - SMSD Matt's Contractor - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/214194/undefined/undefined?\_uref=uuu745200052t2

### Subcontractor/Supplier Declaration

Send Save

General

▶ General

▶ Declaration Information

▶ Additional Details

▶ Subcontractor Supplier Validation

Federal Tax ID	Validated? *
1234567890	Yes
DFSP Enrolled	Validated? *
Yes	Yes
EDGE Certified?	Validated? *
Yes	Yes

Attachments

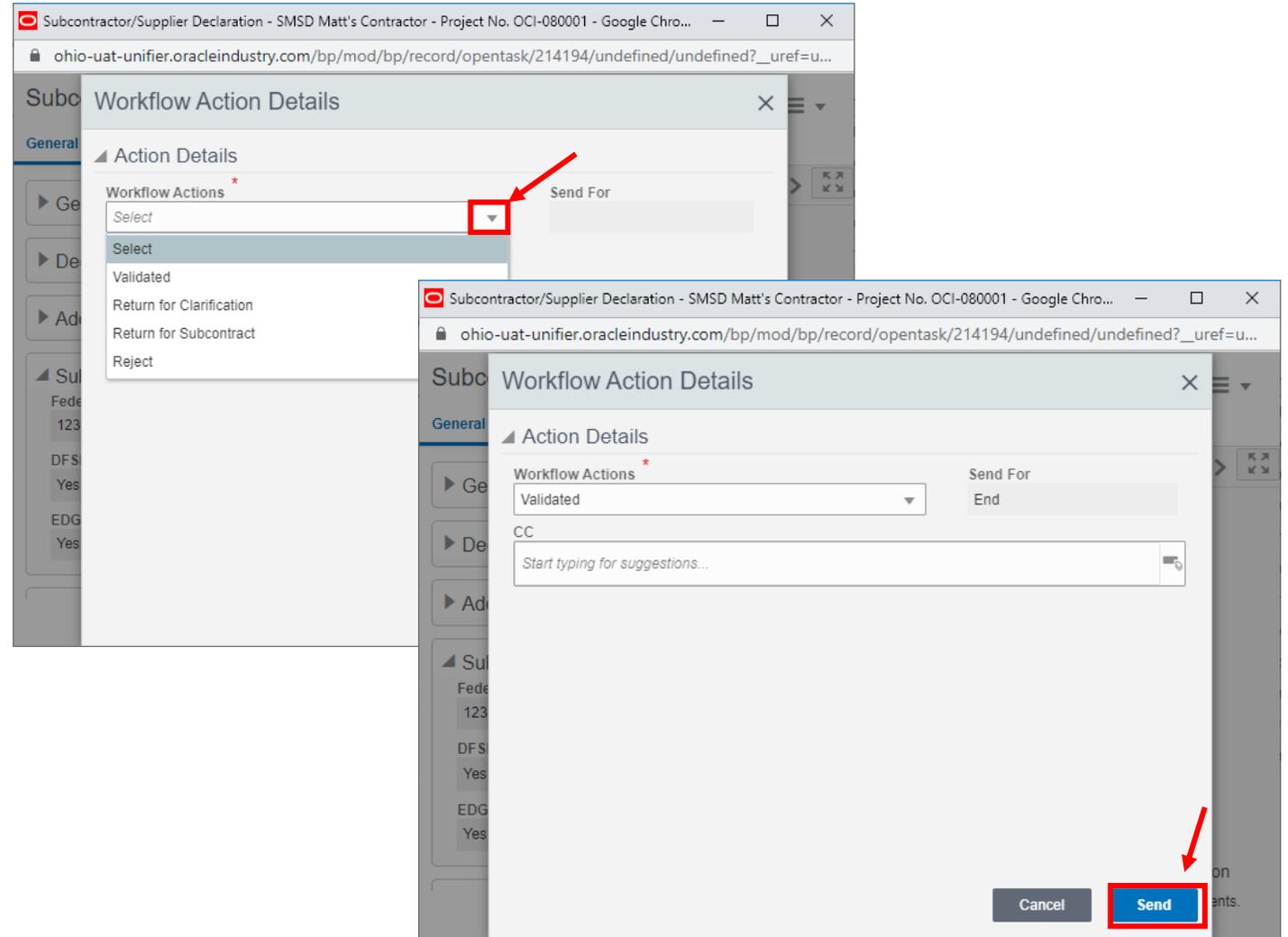
Information

No Attachments.



# PC Validation Step

- ▶ Choose the appropriate Workflow Action and click **Send**



# PM Declaration Approval

- ▶ Select the appropriate Workflow Action

If the record is ready to move to the End:

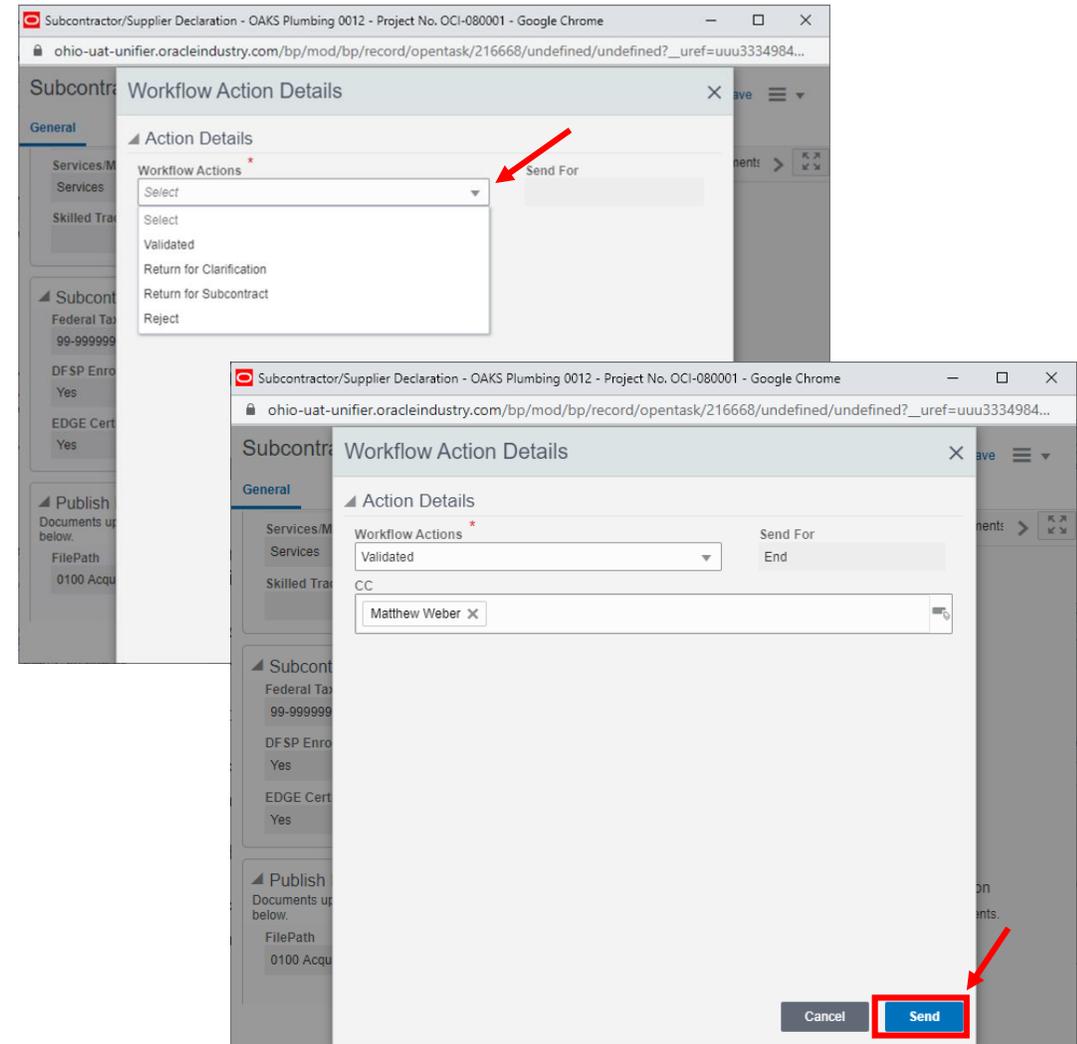
- ▶ Choose **Validated**
- ▶ Click **Send**

If record must be returned for update:

- ▶ Choose **Return for Clarification**
- ▶ Click **Send**

If record should be terminated and sent to End step:

- ▶ Choose **Reject**
- ▶ Click **Send**



# PM Declaration Approval

- ▶ Select the appropriate Workflow Action

If the record is ready to move forward to the PC for Declaration Validation:

- ▶ Choose **Approve**
- ▶ Click **Send**

If record must be returned to the A/E for update:

- ▶ Choose **Return for Clarification**
- ▶ Click **Send**

If record should be terminated and sent to End step:

- ▶ Choose **Reject**
- ▶ Click **Send**

A screenshot of the Oracle Workflow Action Details window. The window title is "Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/216668/undefined/undefined?\_\_uref=uuu3334984...". The window is titled "Subcontractor/Supplier Declaration - OAKS Plumbing 0012 - Project No. OCI-080001 - Google Chrome". The main content area is titled "Workflow Action Details". Under "Action Details", the "Workflow Actions" dropdown is set to "Return for Subcontract". The "Send For" field is "Subcontract Attachment". The "To" field is "Matthew Weber". Under "Due Date Details", the "Task Due Date" field is empty. A message icon (i) is displayed with the text "Task Due Date is not available". At the bottom right, there are "Cancel" and "Send" buttons. The left sidebar shows a list of fields: "General", "Services/M", "Services", "Skilled Tra", "Subcont", "Federal Tax", "99-999999", "DFSP Enro", "Yes", "EDGE Cert", "Yes", "Publish", "Documents up", "below.", "FilePath", "0100 Acqu".

# Validation Links

- Use this link to validate Drug Free Safety Workplace for subcontractors:
  - <https://www.bwc.ohio.gov/employer/services/StateContract/nlbwc/StateContract1.aspx>
- Use this link to validate EDGE for subcontractors and material suppliers:
  - <https://eodreporting.oit.ohio.gov/edge-certification>



# Contract Schedule of Values (SOV)



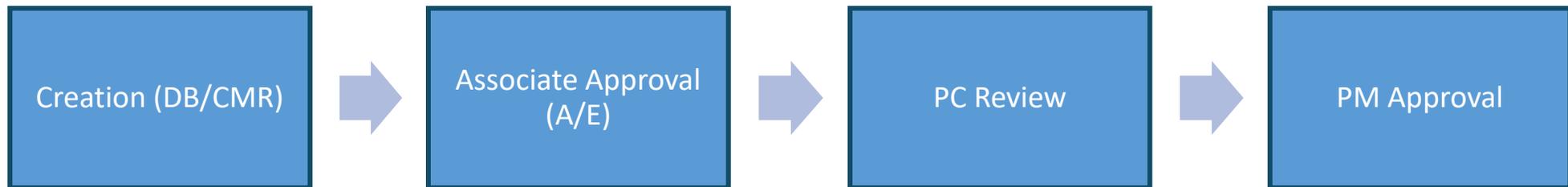
# Purpose & Procedure

- ▶ Provides for the submission, review, and approval of the Contractor's Schedule of Values.
- ▶ The Submitted and approved SOV becomes the basis for all future Contractor Pay Requests.



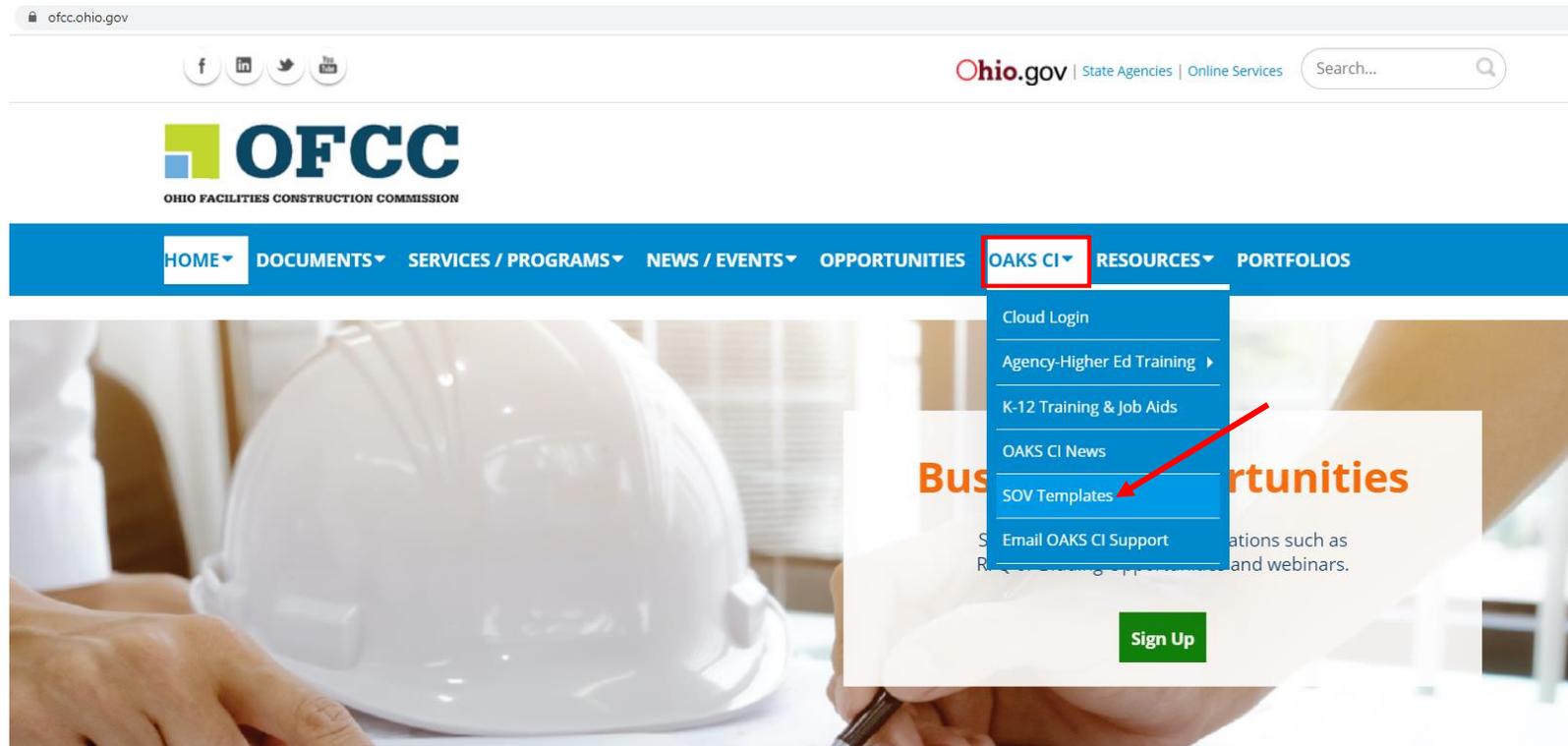
# Contract Schedule of Values (SOV)

- ▶ Workflow Steps



# Locate the Spreadsheet (Contractor)

- ▶ Step 1: Download Excel spreadsheet from website: <http://ofcc.ohio.gov>
  - ▶ Hover your mouse over the OAKS CI tab
    - ▶ Click- SOV Templates



# Locate the Spreadsheet (Contractor)

- ▶ Click - “OAKS CI Contract SOV Import Template – Contractor”

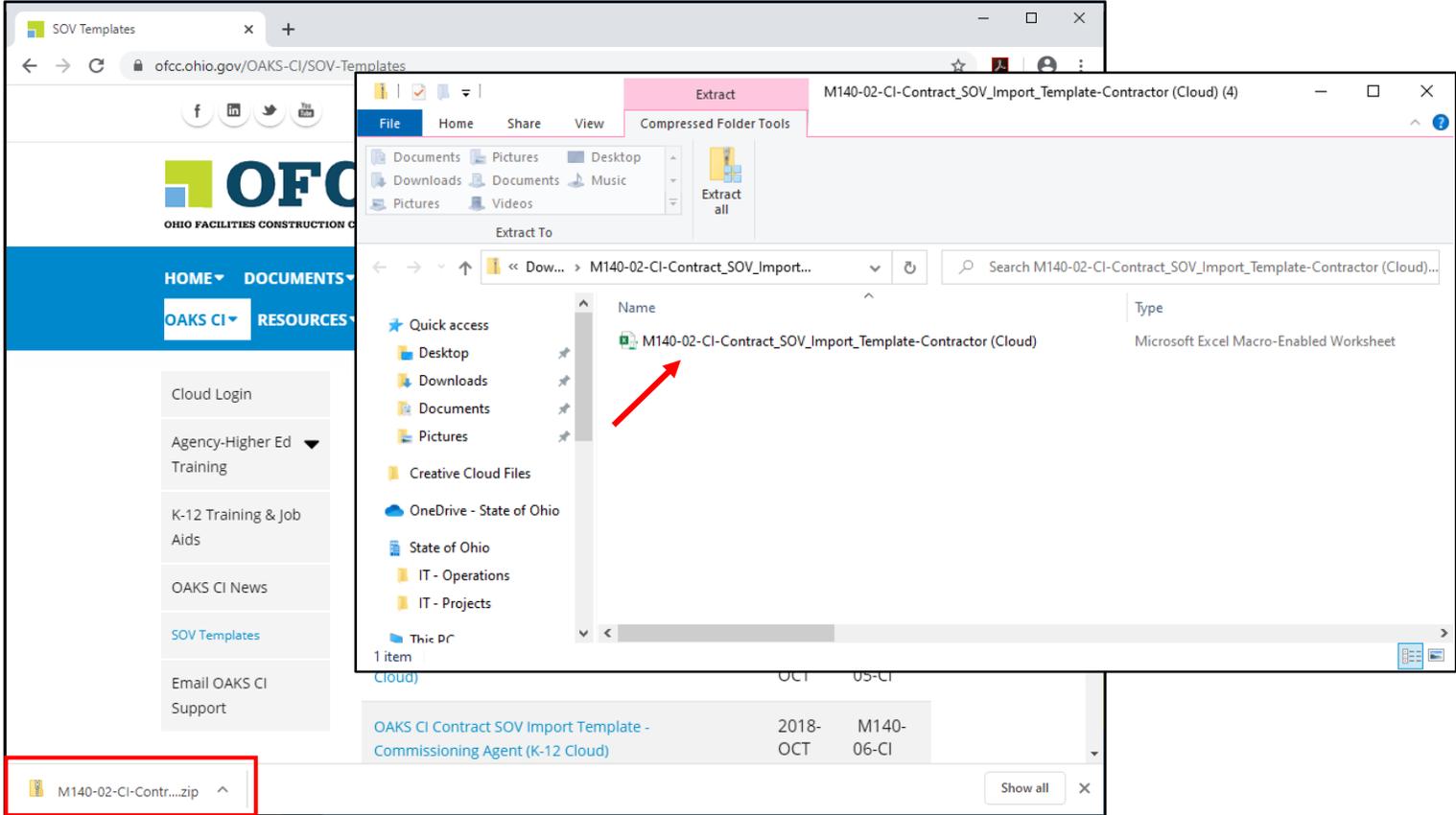
The screenshot shows the OFCC website interface. The header includes the OFCC logo and navigation tabs: HOME, DOCUMENTS, SERVICES / PROGRAMS, NEWS / EVENTS, OPPORTUNITIES, OAKS CI, RESOURCES, and PORTFOLIOS. The 'OAKS CI' tab is selected. On the left, a sidebar menu lists various services, with 'SOV Templates' highlighted. The main content area is titled 'SOV Templates' and contains a table of documents. The first row of the table is highlighted with a red border.

OAKS CI Contract SOV Import Templates Documents below included in this ZIP file		
OAKS CI Contract SOV Import Template - Contractor (Agency/Higher Ed. Cloud)	2018-OCT	M140-02-CI
OAKS CI Contract SOV Import Template - A/E (K-12 Cloud)	2018-OCT	M140-05-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (K-12 Cloud)	2018-OCT	M140-06-CI
OAKS CI Contract SOV Import Template - Contractor (K-12 Cloud)	2019-APR	M140-02-CI
OAKS CI Contract SOV Import Template - Owner Agent (K-12 Cloud)	2018-OCT	M140-08-CI
OAKS CI Contract SOV Import Template - Energy	2019-JAN	
OAKS CI Subcontractor Distribution Import Template - Contractor (K-12 Cloud)	2019-MAY	



# Open the Spreadsheet (Contractor)

- ▶ Step 2: Open downloaded Excel spreadsheet



# Enter Contract SOV Line Items (Contractor)

## ▶ Step 3:

- ▶ Include **ONLY** EDGE Subcontractors/Suppliers

**Note:** If the Subcontractor/Supplier is **EDGE**, type (EDGE) next to your short description

- ▶ Make sure to spell the name of the Subcontractor/Supplier **EXACTLY** the way it is reflected on the Subcontractor/Supplier Declaration record in OAKS CI

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				
CE-01-SC	CE Scheduling Services				
CE-01-PF	CE Partnering Facilitation				
CE-01-MBL	CE Mobilization Labor	Mobilization Labor (EDGE)	\$8,000.00	Mac's Mobiles	
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 Matl				
CE-01-OTL	CE General Conditions Labor				
CE-01-OTM	CE General Conditions Matl				
CE-FC-00	Facility Construction				
CE-FC-02L	Existing Conditions Labor				
CE-FC-02M	Existing Conditions Matl				
CE-FC-03L	Concrete Labor	Concrete Labor	\$5,000.00	Joe's Concrete	
CE-FC-03M	Concrete Matl				



# Adding Additional Lines (Contractor)

- ▶ 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 an Excel spreadsheet with the following data:

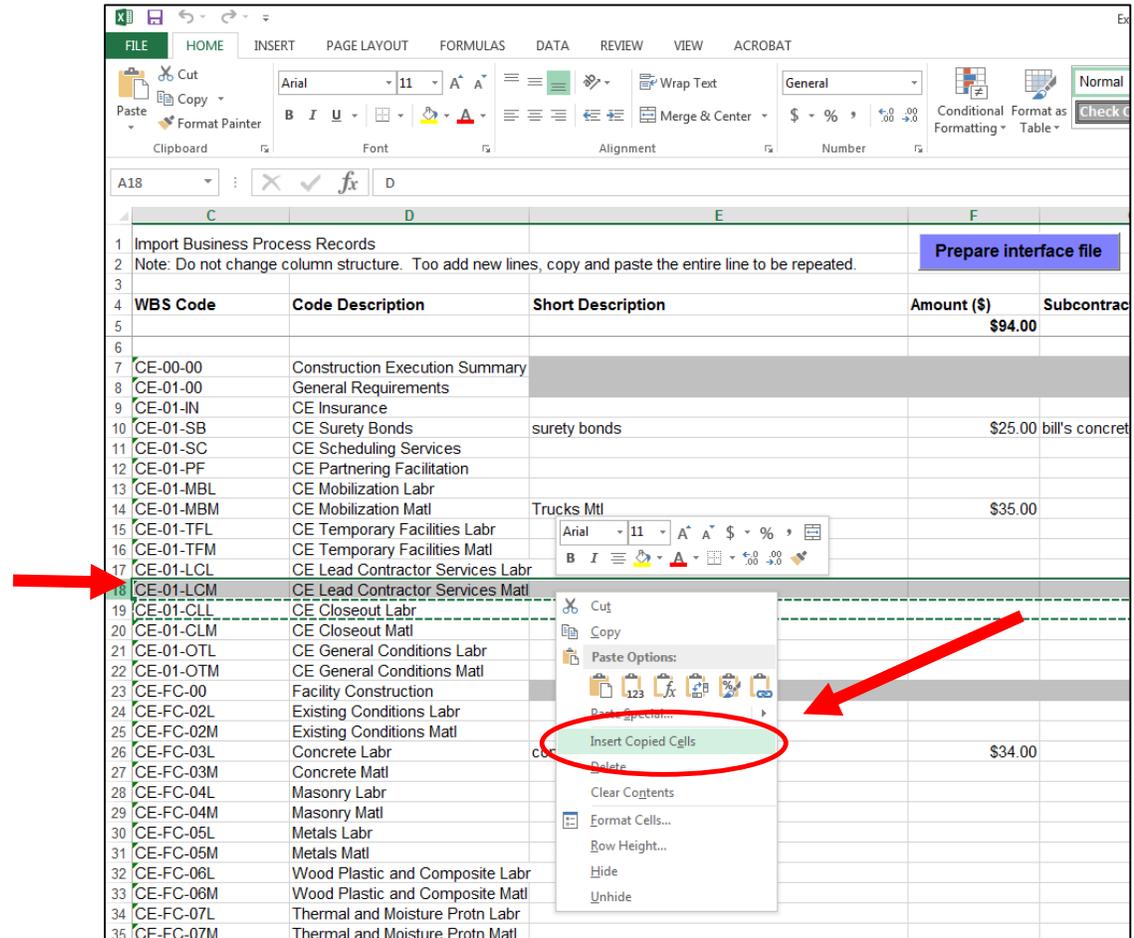
WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
			\$94.00		
CE-00-00	Construction Execution Summary				
CE-01-00	General Requirements				
CE-01-IN	CE Insurance				
CE-01-SB	CE Surety Bonds	surety bonds	\$25.00	bill's concrete	
CE-01-SC	CE Scheduling Services				
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 Lab				
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 (Contractor)

- ▶ Step 4 (cont.):

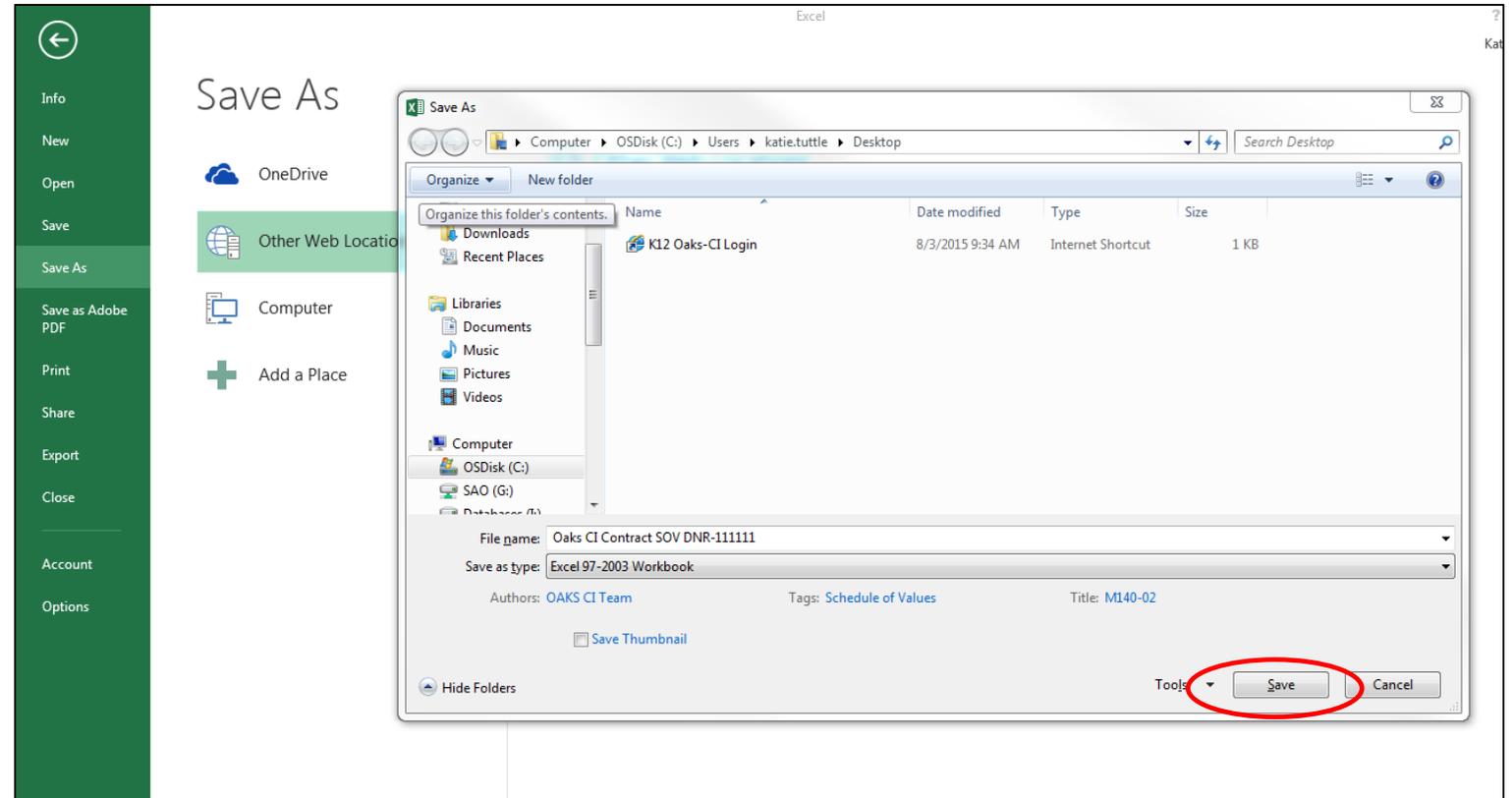
- ▶ Right click on the line you want to be **below** the line you are inserting
- ▶ Choose insert copied cells
- ▶ Your line will show up above the selected line. You can edit the text in the line as necessary



# Save the Spreadsheet (Contractor)

## ▶ Step 5:

- ▶ **Name and Save the Spreadsheet - Very Important!**

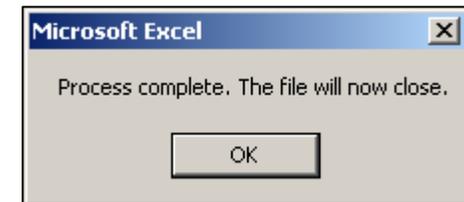


# Prepare Spreadsheet (Contractor)

- ▶ Step 6:
  - ▶ Make sure you have reviewed your spreadsheet with the A/E and PM
  - ▶ Click “Prepare Interface File”

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Sup
			\$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-TFI	CE Temporary Facilities Labor			

This box will appear indicating the file preparation is complete.



# Create Contract SOV



# Create New Contract SOV Record (Contractor)

- Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...>. The page displays a search bar with the text 'DPS' and a table of search results. The table has three columns: Name, Number, and Location. The search results are as follows:

Name	Number	Location
Ohio State Highway Patrol Post 44	DPS:080001	/Agency/Department of Public Safety
OSHP Post 23 LEADS Building	DPS:110001	/Agency/Department of Public Safety
ODPS ACF Standing Seam Roof Renovation	DPS:110003	/Agency/Department of Public Safety
LEADS Data Center Alum Creek Facility	DPS:110006	/Agency/Department of Public Safety
OSHP Academy Range Equip. Replacement	DPS:110009	/Agency/Department of Public Safety
ODPS - EOC Reorganization	DPS:110010	/Agency/Department of Public Safety
OSHP Academy Maintenance & Repair Project	DPS:120001	/Agency/Department of Public Safety
OSHP Alum Creek Crime Lab Addition	DPS:120002	/Agency/Department of Public Safety
Academy HVAC Replacement-Chiller & Range ...	DPS:120004.02	/Agency/Department of Public Safety
Alum Creek HVAC	DPS:130001	/Agency/Department of Public Safety

Annotations in the image include:

- a**: A red box around the '+ sign' button in the top right of the search bar area.
- b**: A red arrow pointing to the search bar containing the text 'DPS'.
- c**: A red arrow pointing to the first row of the search results table.



# Create New Contract SOV Record (Contractor)

- ▶ In OAKS CI navigate to:
  - ▶ Logs -> Contract Schedule of Values
  - ▶ Click **Create**

The screenshot displays the Oracle Primavera Unifier (Test) interface. The top navigation bar includes 'Company Work...', 'OAKS CI Traini...', and 'OAKS CI Distric...'. The left sidebar menu is expanded to show 'Logs', with 'Subcontractor/Supplier Declaration' highlighted by a red arrow. The right pane shows the 'Subcontractor/Supplier Declaration' page, where a '+ Create' button is circled in red. Below the button is a table listing various subcontractors and suppliers, including 'Tom and Jerrys ACME', 'aadv', 'ABC', 'ABC Consulting', 'ABC Mechanical', 'ABC Tool Company', 'Acme Supply', 'aec', 'Ben & Jerry', 'Ben & Jerry Acme', 'Ben & Jerry Concrete', 'Ben & Jerry Concrete Co', 'BEN & JERRY CONCRETE', 'Ben & Jerry Concrete Co.', 'Ben & Jerry Concrete Co.', 'Ben & Jerry's', 'Ben & Jerry's', 'Ben & Jerry's ACME', and 'Ben & Jerry's ACME'. The total count at the bottom right is 'Total: 374'.

# Enter Information Into the Record (Contractor)

- Complete the Upper Form (General Tab)
- Everything with a Red \* is required

The screenshot shows a web browser window titled "Create New Contract Schedule of Values - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucsov/1006/253?\_uref=uuu745200052t2". The page title is "Create New Contract Schedule of Values". The "General" tab is selected and circled in red. The form contains the following fields:

General	
Organization	Record Number
Department of Administrative Services	
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	
Project Location	Status
Surface Road	
Title *	Fee Title
Fred 20091009 OAKS Plumbing	SAO Standard Fee 1

Contract Information	
Contract No. *	Contractor Name
DRC-12001	Sands Decker Ltd.
Trade	Total Contract Amount
General Contractor	350,000.00
EDGE Certified Prime?	Line Item Total (\$)
No	350,000.00
	Difference (\$)
	0.00

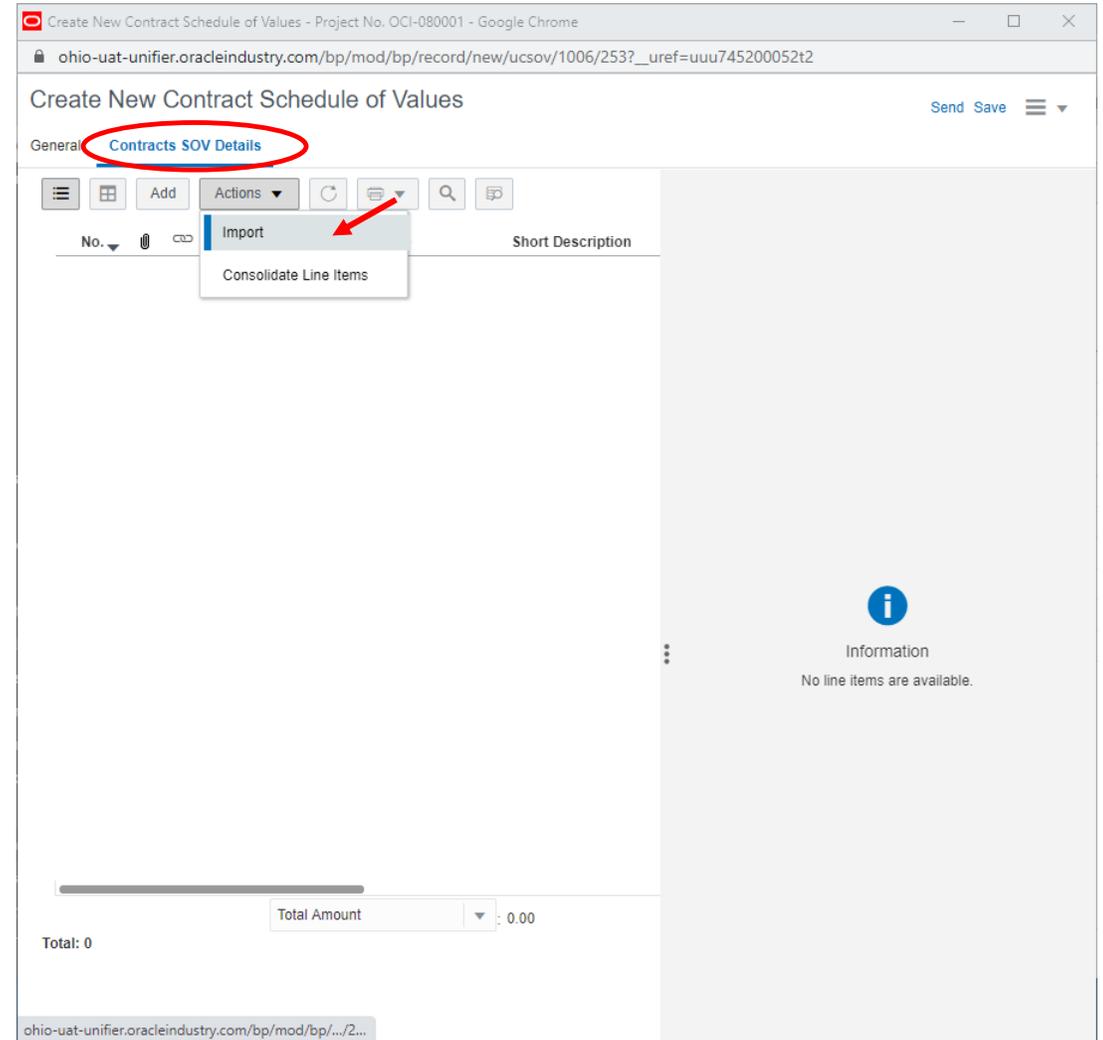
Notes

Attachments

Information  
No Attachments.

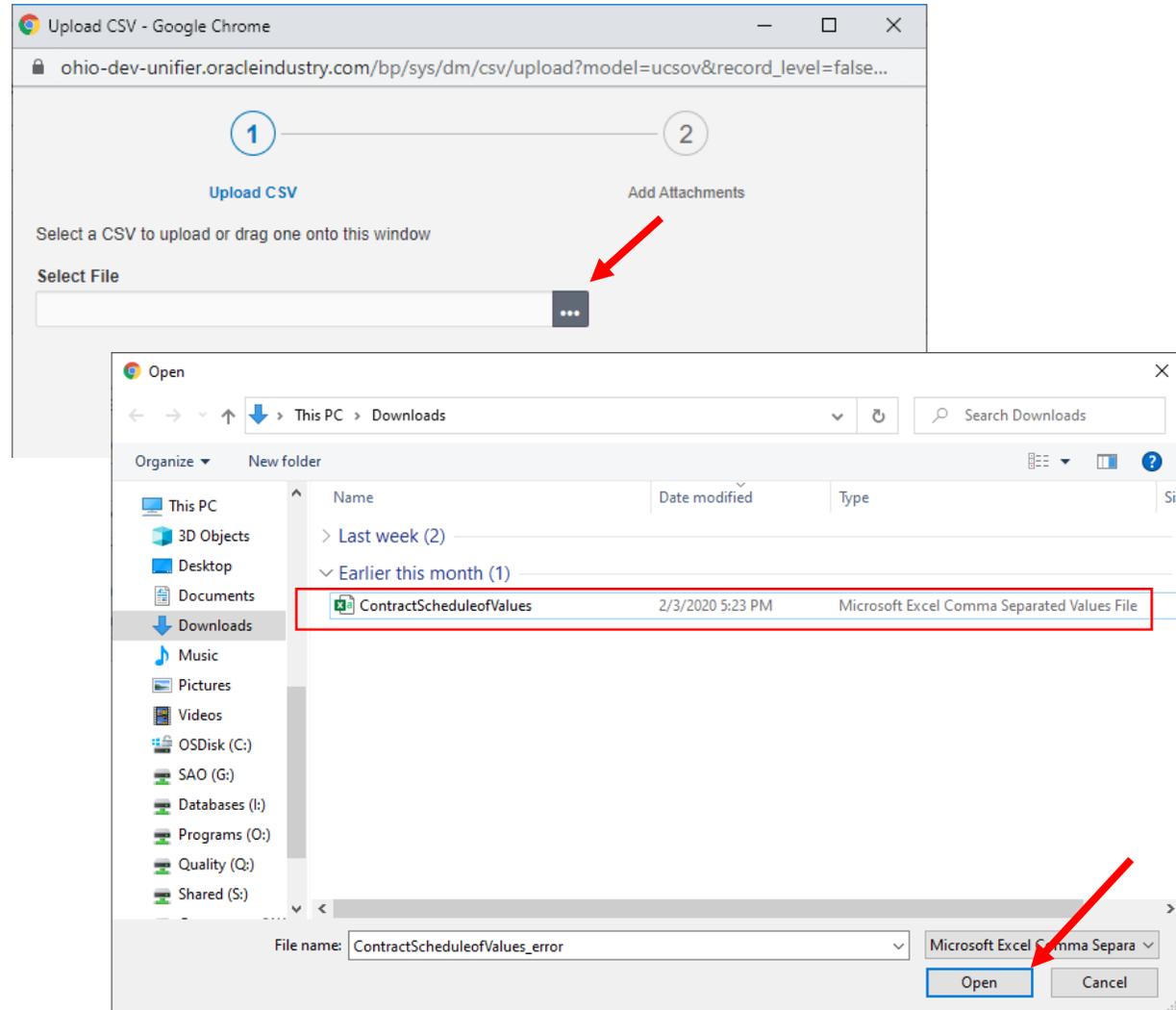
# Import Spreadsheet (Contractor)

- ▶ Click on the Contract SOV Details Tab
- ▶ Click Actions -> Import



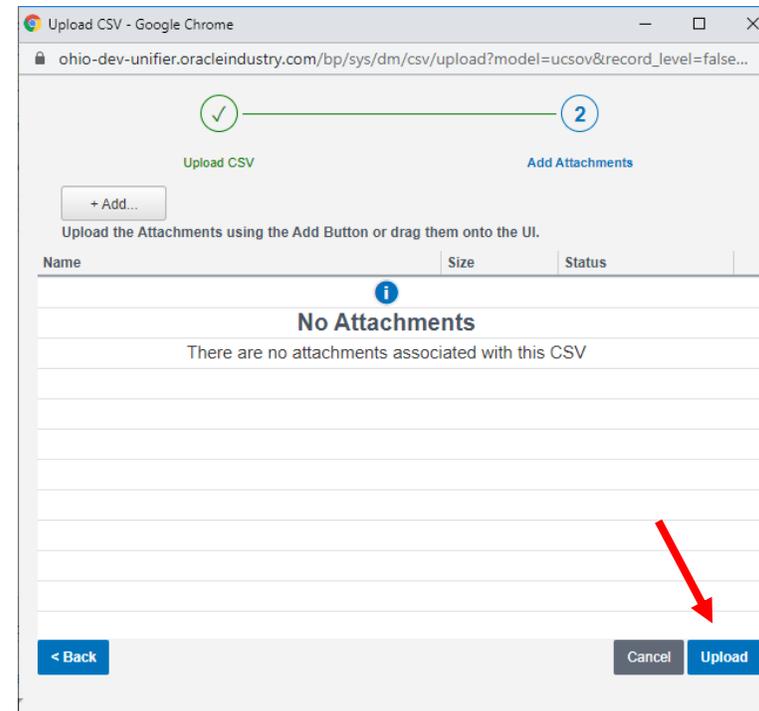
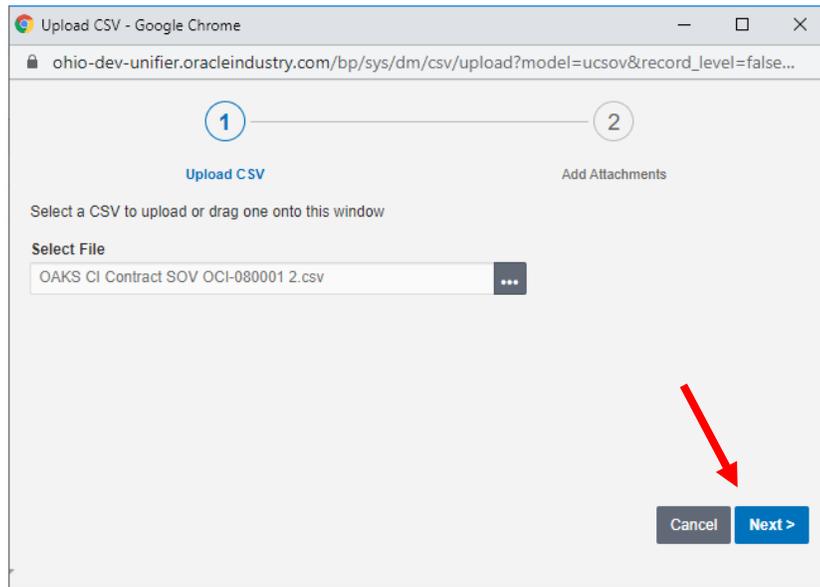
# Import Spreadsheet (Contractor)

- ▶ Click the menu button next to Select File
- ▶ Navigate to and select the “Comma Separated Values (CSV File)” of your spreadsheet
- ▶ Click **Open**



# Import Spreadsheet (Contractor)

- ▶ Click the **Next** button
- ▶ Click the **Upload** button
  - ▶ If successful, the upload window will close, and the line items will be added
  - ▶ If you receive an error, see [Contract SOV Error](#) section



# Review Imported Line Items (Contractor)

- ▶ When all SOV Line Item entries are imported:
  - ▶ Review the 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)

The screenshot displays the 'Create New Contract Schedule of Values' interface. The main table lists line items with columns for No., WBS Code, Code Name, Short Description, Amount (\$), and Subcode. The total amount is shown as 350,000.00. A summary pane on the right shows the Contractor Name as 'Sands Decker Ltd.', Total Contract Amount as 350,000.00, Line Item Total (\$) as 350,000.00, and Difference (\$) as 0.00. A red box highlights the 'Difference (\$)' field in the summary pane, and another red box highlights the 'Total Amount' field in the table footer.

No.	WBS Code	Code Name	Short Description	Amount (\$)	Subcode
005	CE-01-IN	CE Insurance	insurance	40,000.00	
004	CE-FC-03L	Concrete Labr	concrete labor 3	70,000.00	
003	CE-FC-03L	Concrete Labr	concrete,labor 2	70,000.00	
002	CE-FC-03M	Concrete Mall	material - concrete	100,000.00	
001	CE-FC-03L	Concrete Labr	labor - concrete	70,000.00	

Total: 5  
Total Amount: 350,000.00

Contractor Name: Sands Decker Ltd.  
Total Contract Amount: 350,000.00  
Line Item Total (\$): 350,000.00  
Difference (\$): 0.00

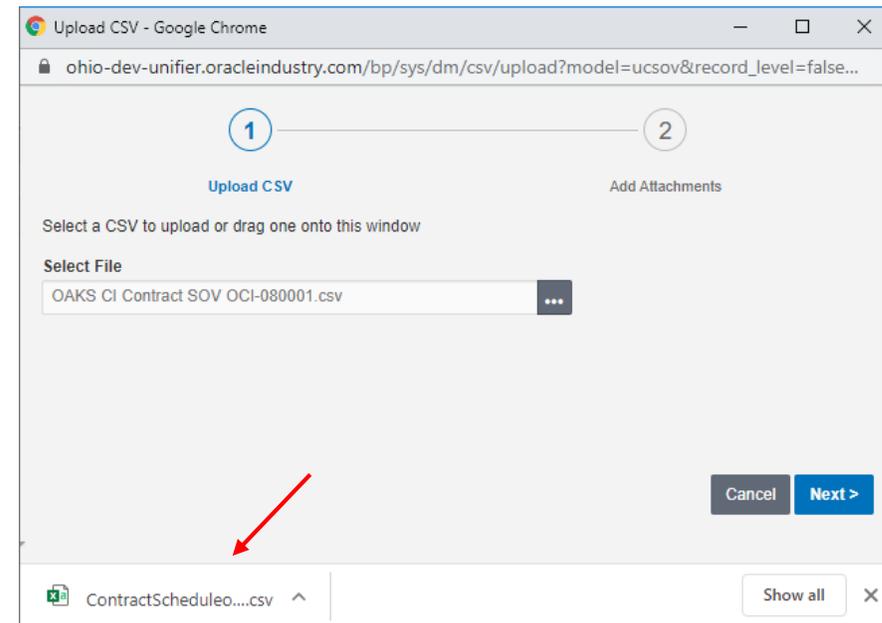
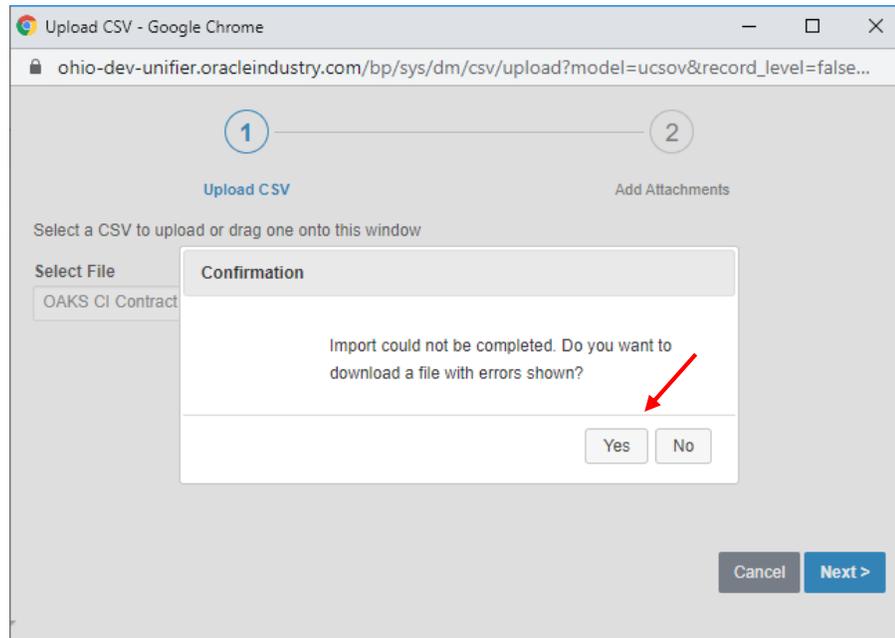
# Complete Contract SOV (Contractor)

- ▶ When the record is ready to move forward, click **Send**
- ▶ Verify Workflow Action: **Submit**
- ▶ Click **Send**

The image displays two screenshots from a web browser showing the 'Create New Contract Schedule of Values' process. The top screenshot shows the 'Create New Contract Schedule of Values' page with the 'Send' button highlighted by a red box and a red arrow. The bottom screenshot shows the 'Workflow Action Details' dialog box with the 'Submit' option selected in the 'Workflow Actions' dropdown menu, and the 'Send' button highlighted by a red arrow. The dialog also shows the 'Task Due Date' field as 'Task Due Date is not available'.

# SOV Import Error (Contractor)

- ▶ If the CSV file had an error while importing, you will see the confirmation message below
- ▶ Click **Yes**
- ▶ An Excel file called **ContractScheduleofValues\_error** will be downloaded
- ▶ Open the Excel File



# SOV Import Error (Contractor)

- ▶ The error will be described in the bottom row of the file
  - ▶ If there is an error that states “**(Your Subcontractor Name) is invalid value for gen\_subcont\_supplier\_bp**”, then the name of the subcontractor was likely entered differently than how it exists in OAKS CI.
  - ▶ If there is any other type of error, contact the [OAKS CI Help Desk](#) for assistance

	A	B	C	D	E	F	G
1	Import Business Process detail items						
2							
3	Note: Do not change column structure						
4							
5	Do not enter symbols, such as currency or digit grouping, in the numeric fields.						
6							
7	Enter a negative numeric value using these formats only: -123456.99 or -123456,99.						
8							
9	Please enter the attachment names separated by ':' in the next available column after the last data element present for Record or Line Item respectively.						
10							
11	D	Group Name	WBS Code	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
12							
13	D		CE-00-00~CE-01-00~CE-01-MBL	Mobilization Labor (EDGE)	8000	Matts Subcontractor	Imported 2/25/2020
14	Matts Subcontractor is invalid value for gen_subcont_supplier_bp.						
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							

# SOV Import Error (Contractor)

- ▶ Open the Excel file you saved in the [previous section](#) prior to clicking the Prepare Interface File button
- ▶ Find the Subcontractor/Supplier name referenced in the error file

The screenshot shows an Excel spreadsheet with the following data:

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
13	CE-01-IN	CE Insurance			
14	CE-01-SB	CE Surety Bonds			
15	CE-01-SC	CE Scheduling Services			
16	CE-01-PF	CE Partnering Facilitation			
17	CE-01-MBL	CE Mobilization Labr	\$8,000.00	Matts Subcontractor	
18	CE-01-MBM	CE Mobilization Matl			
19	CE-01-TFL	CE Temporary Facilities Labr			
20	CE-01-TFM	CE Temporary Facilities Matl			
21	CE-01-LCL	CE Lead Contractor Services Labr			
22	CE-01-LCM	CE Lead Contractor Services Matl			
23	CE-01-CLL	CE Closeout Labr			

A red arrow points to the 'Subcontractor/Supplier' field in row 17, which contains the text 'Matts Subcontractor'.

# SOV Import Error (Contractor)

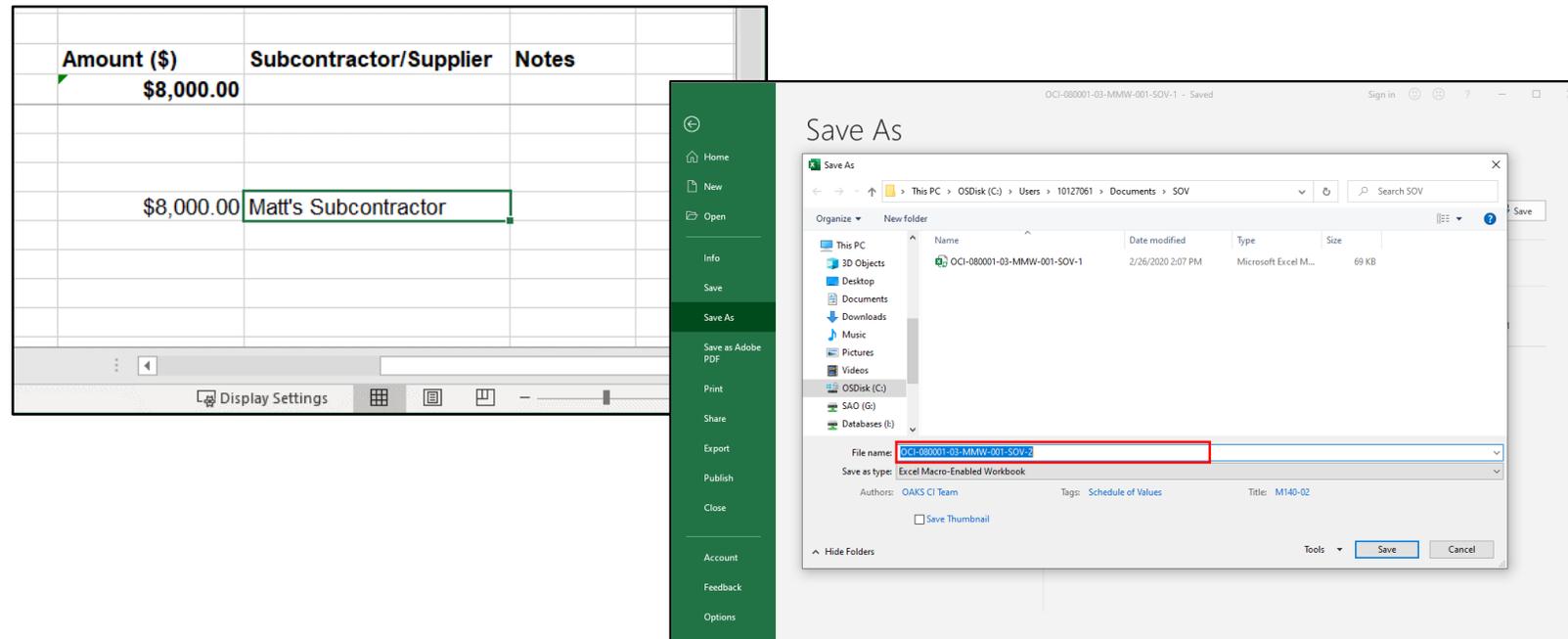
- ▶ Find the Subcontractor/Supplier name in OAKS CI
  - ▶ Navigate to: Logs -> Subcontractor/Supplier Declaration
- ▶ Find the record that had an error
- ▶ Take note of the exact spelling of the Subcontractor/Supplier name

The screenshot displays the Oracle Primavera Unifier (Development) interface. On the left, a navigation menu is shown with 'Logs' highlighted in red. A red arrow points from 'Logs' to a search dropdown menu on the right, where 'Subcontractor/Supplier Declaration' is selected and highlighted in red. The main area shows a table titled 'Subcontractor/Supplier Declaration' with columns for 'Subcontractor/Supplier' and 'Type'. The table contains 14 rows of data, including entries like 'Matt's Subcontractor 2', 'MBA Electric', and 'Oaks Plumbing'. A 'Total: 373' label is visible at the bottom right of the table area.

Subcontractor/Supplier	Type
Matt's Subcontractor 2	Subcontractor
MBA Electric	Subcontractor
Melissa B.	Subcontractor
Michael S	Subcontractor
Mickey Mouse Concrete	Subcontractor
Mike And Sue	Material Supplier
Mike's Mud supply	Material Supplier
MJS Engineering	Consultant
My Friend	Material Supplier
Nelson Stark Company	Subcontractor
oaks plumbig	Material Supplier
Oaks Plumbing	Material Supplier

# SOV Import Error (Contractor)

- ▶ Change the spelling of the Subcontractor/Supplier name to match the record exactly
- ▶ **Save the Excel file with a new name**
  - **Do not** use the same name as the file you saved during the [previous section](#)
  - ▶ If you choose the same name, the next step will not work properly



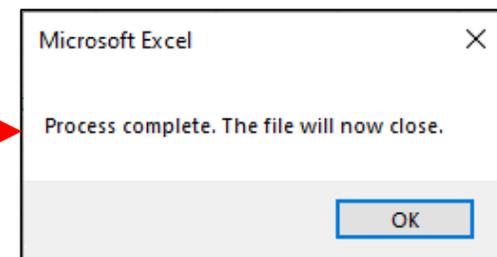
# SOV Import Error (Contractor)

- ▶ Click “Prepare Interface File”
- ▶ Import the new CSV file into the Contract SOV Details Tab (follow the instructions again beginning with the [Import Spreadsheet](#) slide)

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Sup
			\$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 Labr	Sample Description	\$3,000.00	
CE-01-MBM	CE Mobilization Matl			
CE-01-TFL	CE Temporary Facilities Labr			

Prepare interface file

This box will appear indicating the file preparation is complete.



# Associate Approval Step

- ▶ Associate

- ▶ Reviews the record and performs one of the following Workflow Actions:

- ▶ **Recommend Approval:** Approves the SOV submittal from the Contractor

- ▶ **Return for Clarification:** Returns the SOV to the Contractor for revisions or corrections

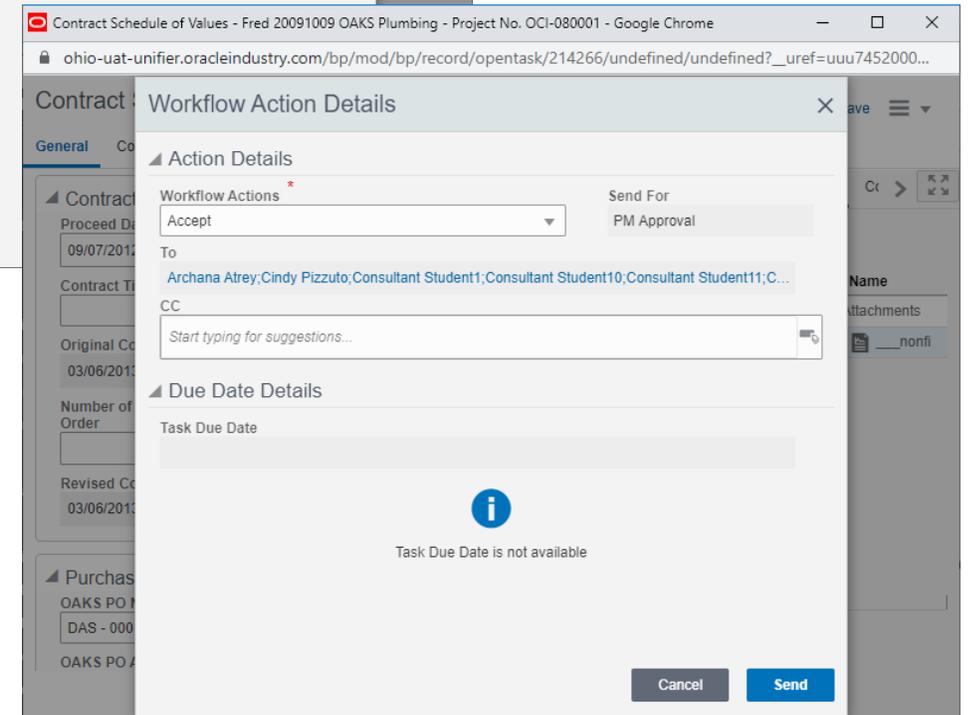
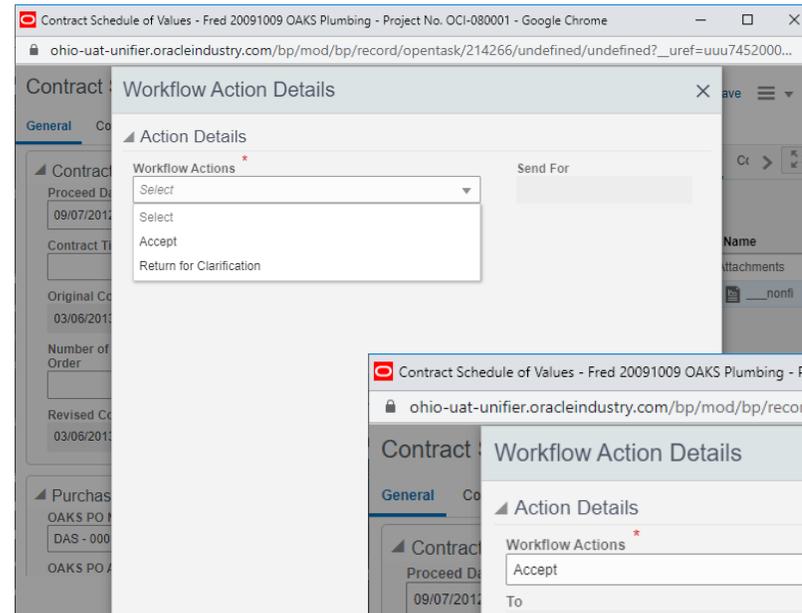


# PC Review Step

- ▶ Project Coordinator

- ▶ Performs one of the following Workflow Actions:

- ▶ **Accept:** Forwards the SOV to the PM for Approval
    - ▶ **Return for Clarification:** Returns the SOV to the Contractor for revisions



# PM Approval Step

- ▶ Project Manager
  - ▶ Performs one of the following Workflow Actions:
    - ▶ **Approve:** Approves the record
    - ▶ **Return for Clarification:** Returns the record for clarification, the submittal review and approval process is repeated
  - ▶ **Once PM approves SOV, the PC will approve the Contract record**



# SOV Approval Completion (PC)

- ▶ Upon SOV final approval, the Contract Record will be opened by the Project Coordinator and moved to the End step
- ▶ Once the SOV is Approved, pay requests can be created.



# GMP Amendment



# DocuSign Enabled Record

- ▶ The Change Order record workflows now utilize DocuSign, which enables electronic signature of change orders. These include:
  - ▶ GMP Amendment
  - ▶ Proposal Request
  - ▶ Request for Change Order
  - ▶ Change Directive
- ▶ Users who are sent a Change Order for signature via DocuSign do not need a separate account to sign the document. However, it is recommended. You can sign up for a free DocuSign account at [docusign.net](https://docusign.net)
- ▶ For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website



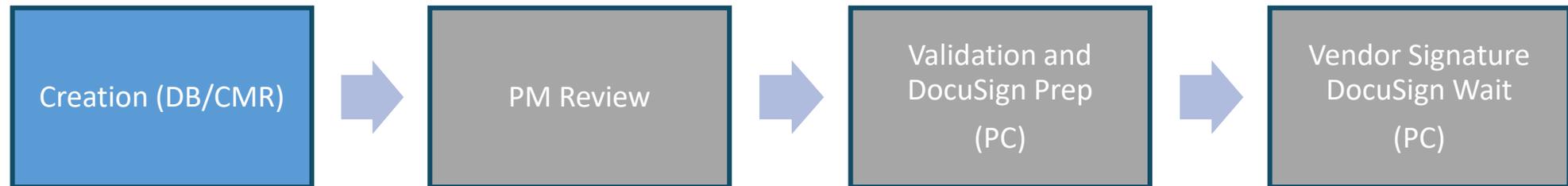
# Purpose & Procedure

- ▶ 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.



# GMP Amendment (SOV)

- ▶ Workflow Steps



# GMP Amendment Creation

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



The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with 'Logs' circled in red. A red arrow points from the text instructions to this 'Logs' item. The main content area shows a 'Change Order' dropdown menu with 'GMP Amendment v3.0' selected. Below the menu is a table of Change Orders.

CO No			
005			
002			
001			
12345			
1			
2			
PR-00			
1			
PR-00			
PR-00			
001			
00009	Proposal Request	R. W. Setterli	
PR-01	Proposal Request	R. W. Setterli	
PR-001	Proposal Request	R. W. Setterli	
1	Proposal Request	R. W. Setterli	
1	Proposal Request	R. W. Setterli	
001	Proposal Request	R. W. Setterli	
001	Proposal Request	R. W. Setterli	
9-16-15	Proposal Request	R. W. Setterli	
6	Proposal Request	R. W. Setterli	

# Complete General Tab

- ▶ Fill out required fields
  - a) Add **Title**
  - b) Click the **Select** button for **Contract Reference**
  - c) Choose **Contract**
  - d) Click **Select**
- ▶ Once the contract is selected, many fields will auto populate.

The screenshot displays the 'Create New Change Order' interface. The 'General' tab is active, showing fields for Organization (Department of Administrative Services), Project Number (OCI-080001), Project Name (OAKS CI Training 1), Project Location (Surface Road), Title (GMP Amendment Example), Contract Reference (OCI-080001-03), Change Order Type (GMP Amendment), and Change Order No. A modal window titled 'Contract Schedule of Values' is open, showing a table of contracts. A red box highlights the 'Title' field in the main form (a). A red circle highlights the 'Select' button next to the Contract Reference field (b). A blue circle highlights the selected contract in the modal table (c). A blue circle highlights the 'Select' button at the bottom of the modal (d).

Title	Contract No.	Revised Complete... Date	Contractor Name	Status	Creation Date	Reco... No.
Stored Mat Test	15	03/15/2020	OAKS Plumbing	Approved	08/04/2020 06:20 AM	CSOV
Fred 20091009 OAKS Plumbing	DRG-12001	03/06/2013	Sands Decker Ltd	Approved	07/28/2020 04:46 PM	CSOV
Fred 20091008 OAKS Plumbing	OCI-080001-03		OAKS Plumbing	Approved	10/08/2009 07:02 AM	CSOV
Hooks Test1	22-22222		Sands Decker Ltd	Approved	07/24/2009 05:19 AM	CSOV

# Complete General Tab

- ▶ Scroll down the record
- ▶ Continue adding information in the required red \* fields

The screenshot shows a web browser window with the URL `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7513/1?_uref=uuu333498495t2`. The page title is "Create New Change Order - Project No. OCI-080001 - Google Chrome". The main heading is "Create New Change Order" with "Send Save" and a menu icon. Below the heading are tabs for "General" and "Line Item List".

The form is divided into several sections:

- Cost of the Work (\$)**: 800,000.00
- Contract Sum (\$)**: 890,000.00
- Construction Design Services Fee % Cap**: 0
- Contingency % Cap**: 0
- CM/DB Fee % Cap**: 0
- Construction Stage Personnel Costs (\$) \***: 200,000.00
- Construction Personnel Cost Cap (\$)**: 0.00
- General Conditions Costs (\$) \***: 200,000.00
- General Conditions Costs Cap (\$)**: 0.00
- Subcontracted Work (\$) \***: 200,000.00
- Self-Performed Work (\$) \***: 200,000.00
- Contingency (\$) \***: 30,000.00
- Contingency Cap (\$)**: 0.00
- Construction Design Services Fee (\$) \***: 30,000.00
- Construction Design Services Fee Cap (\$)**: 0.00
- CM/DB Fee (\$) \***: 30,000.00
- CM/DB Fee Cap (\$)**: 0.00
- Total Amount (\$)**: 890,000.00
- Line Item Total (\$)**: 0.00
- Difference (\$)**: 890,000.00

At the bottom, there is a section for "Enter the agreed to Contract Time. The Proceed Date will be entered at a later step." with a "Proceed Date" field and a "Contract Days - Final Acceptance \*" field containing the value 390. A "GMP Completion Date" field is also present.

On the right side, there is an "Attachments" section with a "Comments" tab and an "Information" icon. A blue dashed arrow points to the "Attachments" section.

# Add Line Items

- a) Click on the **Line Item List** Tab
- b) Click **Add**

The screenshot shows a web browser window titled "Create New Change Order - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7513/1?\_\_uref=uuu333498495t2". The page title is "Create New Change Order". There are "Send" and "Save" buttons in the top right corner. Below the title, there are two tabs: "General" and "Line Item List", with "Line Item List" being the active tab. Below the tabs, there is a toolbar with several icons, including a grid icon, an "Add" button, and an "Actions" dropdown menu. The "Add" button is circled in red. Below the toolbar, there is a table header with columns: "No.", "Refer...", "WBS Code", and "Code Name". The "Refer..." column has a small icon next to it. A blue circle with the letter "a" is positioned above the "Line Item List" tab, and a red arrow points from it to the "Line Item List" tab. Another blue circle with the letter "b" is positioned above the "Add" button, and a red arrow points from it to the "Add" button. The table body is empty. On the right side of the page, there is an information panel with a blue circle containing an "i" icon, the word "Information", and the text "No line items are available." At the bottom of the page, there is a "Total Amount" field with a dropdown arrow and the value "0.00". Below that, it says "Total: 0".

# Complete Line Item Info

- ▶ Complete all fields marked with a red \* then click “Save & Add New” to continue adding lines

- c) Complete all fields marked with a red \*
- d) Click **Save** to finish or **Save & Add New** to continue adding lines

The screenshot shows the 'Create New Change Order' interface. The 'Line Item Details' panel is open, displaying the 'General' section. A red bracket labeled 'c)' encompasses the following fields: Reference (with a placeholder 'Type a Reference No...'), WBS Code \* (containing 'CE-CE-BE'), Code Name (containing 'Construction Execution Budget'), Short Description \* (containing 'Bid Package #1'), and Amount (\$) \* (containing '80,000.00'). A red circle labeled 'd)' is positioned over the 'Save & Add New' button at the bottom right of the panel. The 'Save' button is also circled in red. The 'Total Amount' is shown as 0.00.



# Send GMP Amendment

- ▶ When the record is ready to move forward, click **Send**

Create New Change Order - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7513/1?\_uref=uuu333498495t2

Create New Change Order

General Line Item List

Send Save

Attachments Comments

Information  
No Attachments.

Contingency % Cap	0
Construction Design Services Fee % Cap	0
CM/DB Fee % Cap	0
Cost of the Work (\$)	800,000.00
Construction Stage Personnel Costs (\$) *	200,000.00
Construction Personnel Cost Cap (\$)	0.00
General Conditions Costs (\$) *	200,000.00
General Conditions Costs Cap (\$)	0.00
Subcontracted Work (\$) *	200,000.00
Self-Performed Work (\$) *	200,000.00
Contingency (\$) *	30,000.00
Contingency Cap (\$)	0.00
Construction Design Services Fee (\$) *	30,000.00
Construction Design Services Fee Cap (\$)	0.00
CM/DB Fee (\$) *	30,000.00
CM/DB Fee Cap (\$)	0.00
Contract Sum (\$)	890,000.00
Total Amount (\$)	890,000.00
Line Item Total (\$)	890,000.00
Difference (\$)	0.00



# Send GMP Amendment

- ▶ Verify Workflow Action: **Submit**
- ▶ Click **Send**

The screenshot shows a web browser window titled "Create New Change Order - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7513/1?\_\_uref=uuu333498495t2". The main content area is a "Create New Change Order" form. The "Workflow Action Details" section is expanded, showing "Submit" selected in the "Workflow Actions" dropdown menu. The "Send For" field is set to "PM Review". The "To" field contains the email addresses "Archana Atrey; Brett Gundlach; Cindy Pizzuto; Consultant Student1; Consultant Student10; Consult...". The "CC" field is empty with the placeholder text "Start typing for suggestions...". The "Due Date Details" section shows "Task Due Date" is not available. At the bottom right, there are "Cancel" and "Send" buttons. The "Send" button is circled in red, and a red arrow points to it.

# GMP Subcontract Distribution



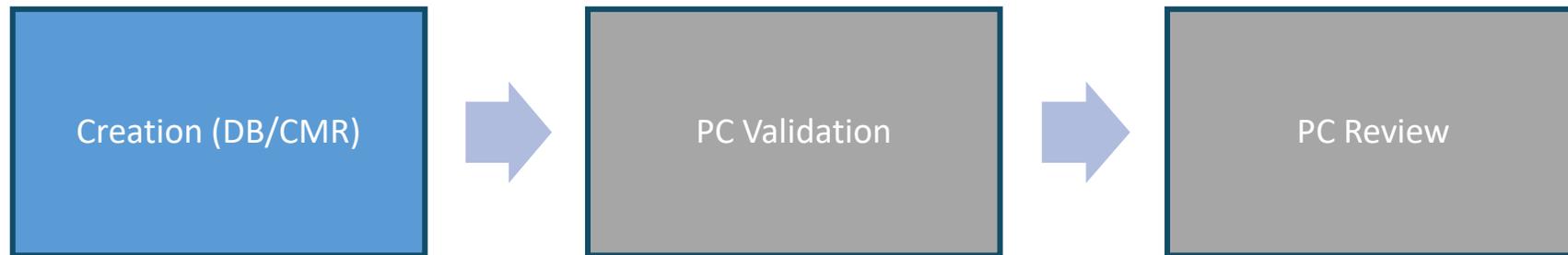
# Purpose & Procedure

- ▶ 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.
- ▶ Ensure that a [Subcontractor/ Supplier Declaration](#) has been completed for all work that will be performed by your Subcontractor (click the link above to return to the SMSD section).



# GMP Subcontractor Distribution

- ▶ Workflow Steps



# GMP Subcontractor Distribution Creation

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

The screenshot shows the Oracle Primavera Unifier (Development) interface. The breadcrumb navigation is Agency > OAKS CI Training > OAKS CI Training 4. The left sidebar menu has 'Logs' circled in red, with a red arrow pointing to the 'Change Order' menu item. A dropdown menu is open for 'Change Order', with 'GMP Subcontract Distribution' highlighted. Below the dropdown, a table lists various change orders.

CO No	Change Order	Setter
001	Agency Change Directive	Setter
001	Agency Proposal Request	Setter
001	Agency Request for CO	Setter
001	Contingency Consumption	Setter
005	Expedited Deduct Change Order	Setter
002	GMP Amendment v3.0	Setter
001	<b>GMP Subcontract Distribution</b>	Setter
12345	OFCC Change Directive 3.0	Setter
12345	OFCC GMP Amendment	Setter
1	OFCC Proposal Request v3.0	Setter
2	Request for Change Order v3.0	Setter
PR-00	SAO Field Work Order	Setter
1	V2 - OFCC Change Directive	Setter
PR-00	Zero Dollar Change Order	Setter
PR-00	v3.0 GMP Subcontractor Distribution	Setter

Total: 24

[https://ohio-dev-unifier.oracleindustry.com/bp/mod/bp/log?model=uco&uuu\\_dataPickerDe=&src\\_model=&bulk:](https://ohio-dev-unifier.oracleindustry.com/bp/mod/bp/log?model=uco&uuu_dataPickerDe=&src_model=&bulk:)



# GMP Subcontractor Distribution

## ▶ Fill out required fields

- a) Add **Title**
- b) Click the **Select** button for **Contract Reference**
- c) Choose **Contract**
- d) Click **Select**

## ▶ Once the contract is selected, many fields will auto populate

- e) Fill out required fields in the Change Order Details section

The screenshot shows the 'Create New Change Order' web application. The 'General' tab is active, and the 'Contract Reference' dropdown menu is open, showing a list of contracts. A red box highlights the 'Title' field in the main form, and another red box highlights the 'Contract Reference' dropdown menu. A third red box highlights the 'Select' button in the dialog box. A fourth red box highlights the 'Change Order Details' section in the main form. A fifth red box highlights the 'Select' button in the dialog box. The table in the dialog box has a 'C' circled in blue above the 'Contractor Name' column.

Title	Contract No.	Revised Completion Date	Contractor Name	Status	Creation Date	Record No.
Stored Mat Test	15	03/15/2020	OAKS Plumbing	Approved	08/04/2020 06:20 AM	CSOV
Fred 20091009 OAKS Plumbing	DRC-12001	03/06/2013	Sands Decker Ltd.	Approved	07/28/2020 04:46 PM	CSOV
Fred 20091008 OAKS Plumbing	OCI-080001-03		OAKS Plumbing	Approved	10/08/2009 07:02 AM	CSOV
Hooks Test1	22-22222		Sands Decker Ltd.	Approved	07/24/2009 05:19 AM	CSOV



# GMP Subcontractor Distribution

- ▶ Fill out required fields

- a) Add **Title**
- b) Click the **Select** button for **Contract Reference**
- c) Choose **Contract**
- d) Click **Select**

- ▶ Once the contract is selected, many fields will auto populate

- e) Fill out required fields in the Change Order Details section

- ▶ **Total Amount Field should remain \$0.00**

Create New Change Order - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucco/1006/3750?\_uref=uuu33349849512

### Create New Change Order

General Line Item List

**General**

Organization  
Department of Administrative Services

Project Number  
OCI-080001

Project Name  
OAKS CI Training 1

Project Location  
Surface Road

Title \*  
Subcontractor Distribution Example

Contract Reference \*  
OCI-080001-03

Change Order Type  
GMP Subcontract Distribution

Change Order No.

Record Number  
Creator  
Matthew M...

Creation Date  
Status  
Trade  
Plumbing

Contractor  
OAKS Plumbing

EDGE Cert  
Yes

Fee Title  
SAO Standard Fee 1

### Contract Schedule of Values

Search | Find on Page

Title	Contract No.	Revised Completion Date	Contractor Name	Status	Creation Date	Record No.
Stored Mat Test	15	03/15/2020	OAKS Plumbing	Approved	08/04/2020 06:20 AM	CSOV
Fred 20091009 OAKS Plumbing	DRC-12001	03/06/2013	Sands Decker Ltd.	Approved	07/28/2020 04:46 PM	CSOV
Fred 20091008 OAKS Plumbing	OCI-080001-03		OAKS Plumbing	Approved	10/08/2009 07:02 AM	CSOV
Hooks Test1	22-22222		Sands Decker Ltd.	Approved	07/24/2009 05:19 AM	CSOV

Total: 4

Cancel Select

### Change Order Details

Description of Work \*  
Construction Schedule of Values breakdown by Contractor

Justification \*  
Construction Schedule of Values breakdown by Contractor - justification

Current Completion Date  
Contract Days Changed This CO  
Revised Completion Date

Total Amount (\$) 0.00

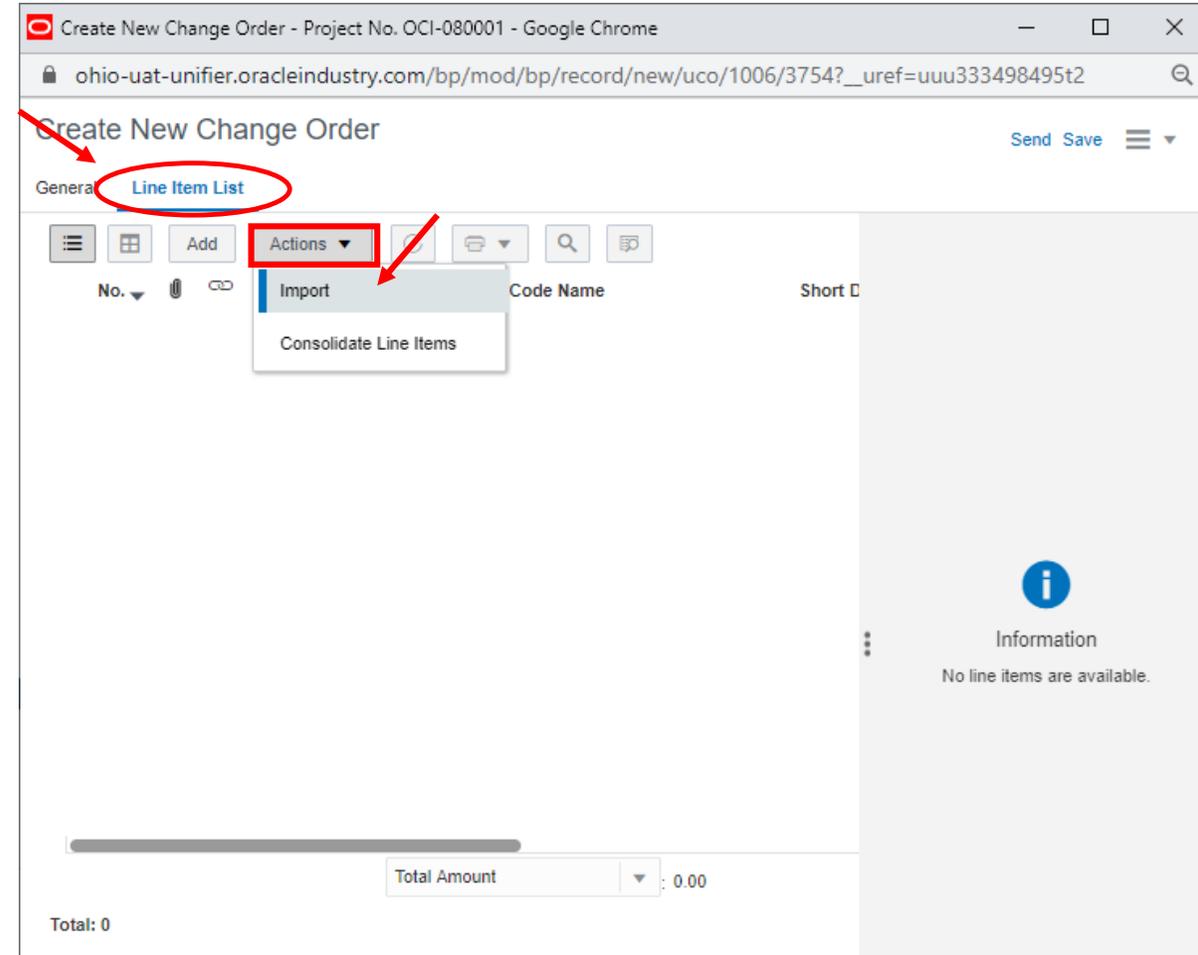
Line Item Total (\$) 0.00

Difference (\$) 0.00



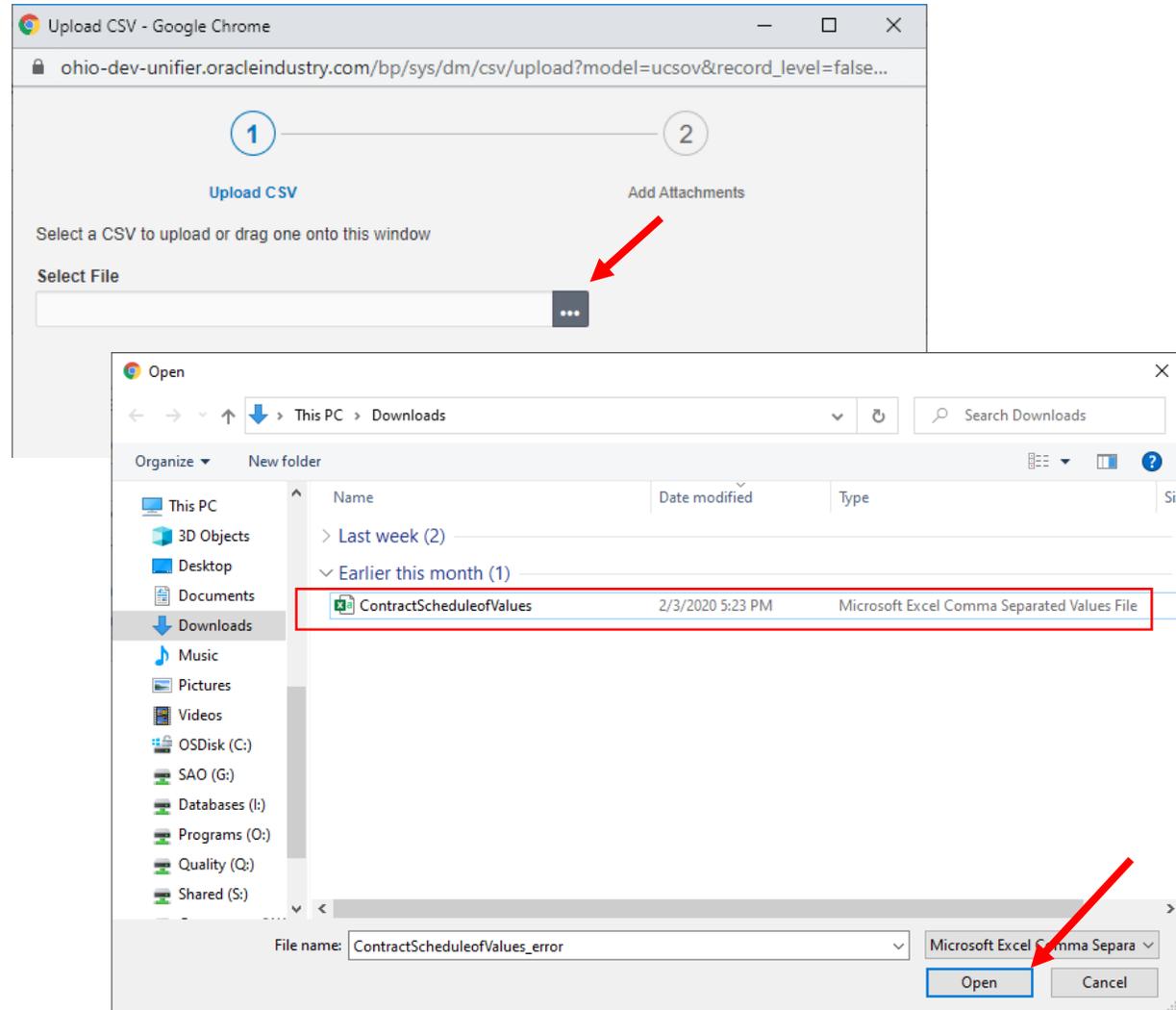
# Import Spreadsheet (Contractor)

- ▶ Click on the **Line Item List**
- ▶ Click **Actions** -> **Import**



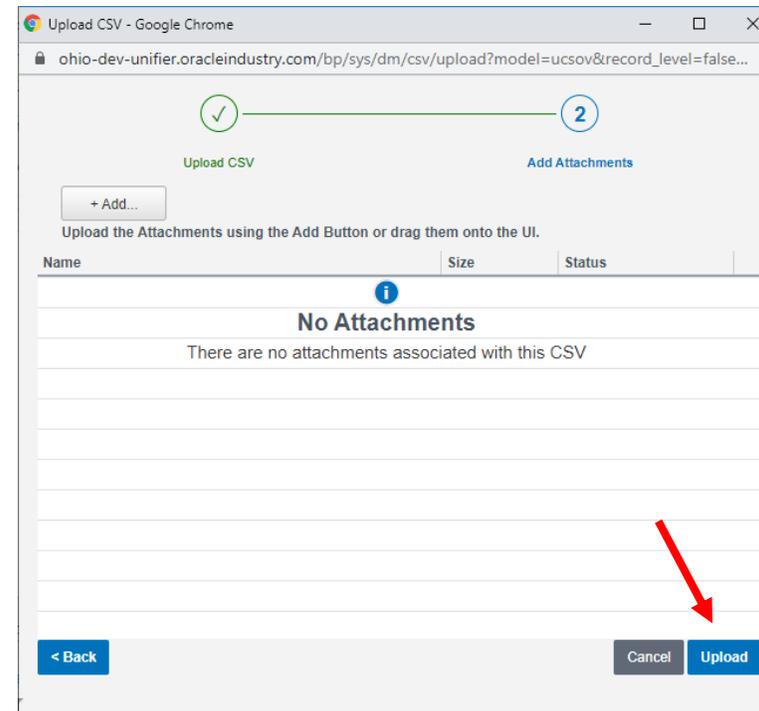
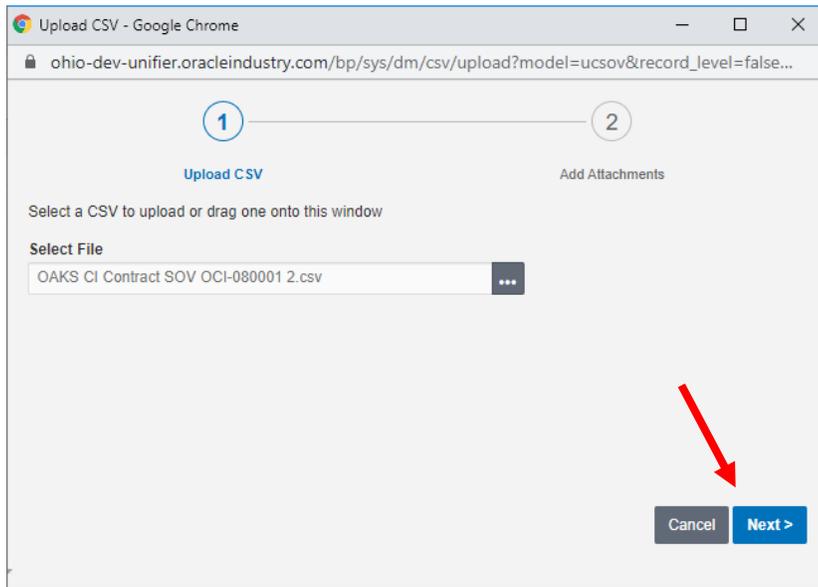
# Import Spreadsheet (Contractor)

- ▶ Click the menu button next to Select File
- ▶ Navigate to and select the “Comma Separated Values (CSV File)” of your spreadsheet
- ▶ Click **Open**



# Import Spreadsheet (Contractor)

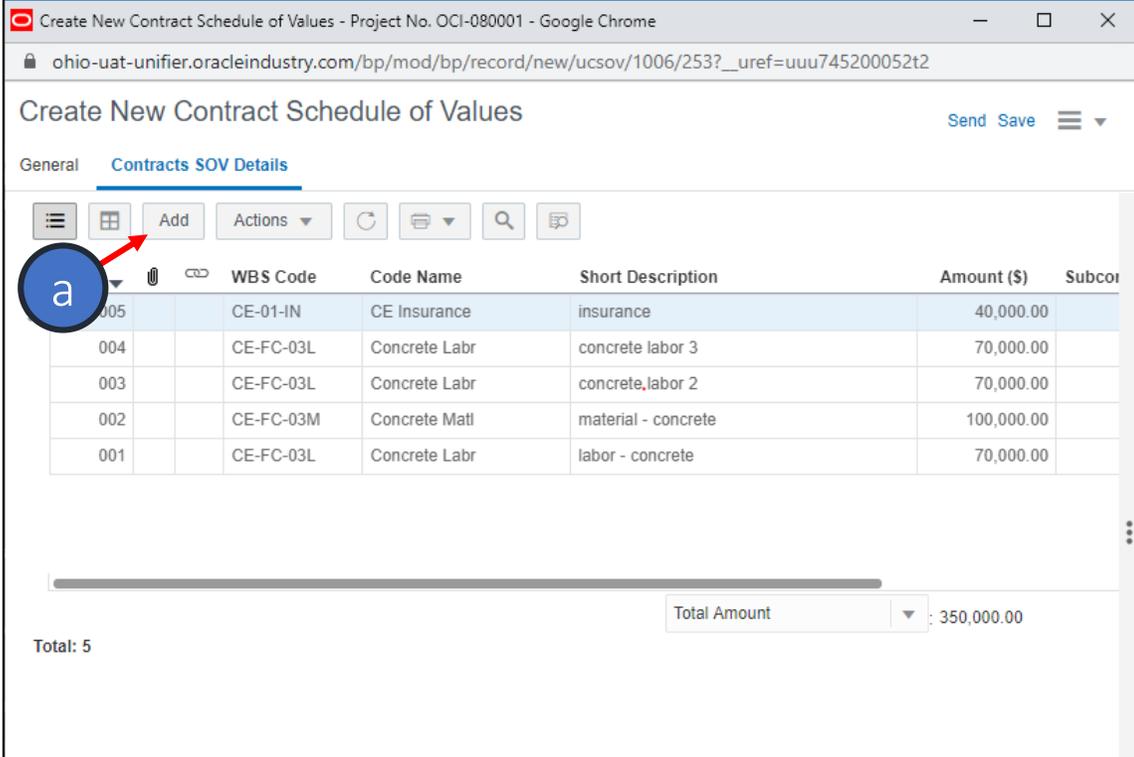
- ▶ Click the **Next** button
- ▶ Click the **Upload** button
  - ▶ If successful, the upload window will close, and the line items will be added
  - ▶ If you receive an error, see [Contract SOV Error](#) section



# Review Imported Line Items (Contractor)

- ▶ When all SOV Line Item entries are imported, you must now select the lines to deduct the amounts for the subcontracted work:

a) Click **Add**



Create New Contract Schedule of Values - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucsov/1006/253?\_\_uref=uuu745200052t2

### Create New Contract Schedule of Values

Send Save

General **Contracts SOV Details**

Add Actions

	WBS Code	Code Name	Short Description	Amount (\$)	Subcor
005	CE-01-IN	CE Insurance	insurance	40,000.00	
004	CE-FC-03L	Concrete Labr	concrete labor 3	70,000.00	
003	CE-FC-03L	Concrete Labr	concrete, labor 2	70,000.00	
002	CE-FC-03M	Concrete Matl	material - concrete	100,000.00	
001	CE-FC-03L	Concrete Labr	labor - concrete	70,000.00	

Total: 5

Total Amount : 350,000.00

# Review Imported Line Items (Contractor)

- b) Click the **Select Button** next to Reference
- c) Choose the Line Item from which to pull funds for distribution
- d) Click **Select**

The screenshot displays the 'Create New Change Order' application interface. The main window shows the 'Line Item List' with a table containing one item:

No.	Refer...	WBS Code	Code Name
001	0	CE-CE-BE	Construction Ex

The 'Line Item Details' panel is open, showing the following information:

- Reference: 1
- WBS Code: CE-01-IN
- Code Name: CE Insurance
- Short Description: CE Insurance
- Amount (\$): -100,000.00
- EDGE Certified Prime Contractor?: Yes
- Subcontractor/Supplier:

The 'Commit Line Item Picker' window is also visible, showing a table of items:

Item #	Ref.	WBS Item	CBS Code
000010	1	CE Insurance	CE-01-IN
000020	2	CE Surety Bonds	CE-01-SB
000030	3	Plumbing Labr	CE-FS-22L
000040	4	Plumbing Matl	CE-FS-22M
000050	5	Gas and Liquid Handling Labr	CE-PE-43L
000060	6	Gas and Liquid Handling Matl	CE-PE-43M
000070	7	Clean Job Site	CE-01-LCL

Callouts 'b', 'c', and 'd' indicate the steps: 'b' points to the 'Select' button in the 'Line Item Details' panel, 'c' points to the 'Select' button in the 'Commit Line Item Picker' window, and 'd' points to the 'Select' button in the 'Commit Line Item Picker' window.



# Review Imported Line Items (Contractor)

- d) Enter Short Description
- e) Add the **DEDUCT** Amount
- f) Click **Save & Add New** to continue adding deduct lines, or **Save** to finish

Create New Change Order - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uco/1006/3754?\_uref=uuu333498495t2

### Create New Change Order

Send Save

General **Line Item List**

Add Actions

No.	Refer...	WBS Code	Code Name
001	0	CE-CE-BE	Construction Ex

**Line Item Details**

General

Reference: 1

WBS Code \*: CE-01-IN

Code Name: CE Insurance

Short Description \*: CE Insurance

Amount (\$): -100,000.00

EDGE Certified Prime Contractor?: Yes

Subcontractor/Supplier:

Cancel Save **Save & Add New**

Total Amount: 100,000.00

Total: 1



# Completed Form

- ▶ Once complete, the total dollar amount should be **\$0.00**
- ▶ When the record is ready to move forward, click **Send**

The screenshot shows the 'Create New Change Order' form in Oracle Primavera Unifier. The browser title is 'Create New Change Order - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uco/1006/3754?\_uref=uuu333498495t2'. The form has tabs for 'General' and 'Line Item List'. The 'Line Item List' tab is active, showing a table with the following data:

No.	Refer...	WBS Code	Code Name	Shc
002	1	CE-01-IN	CE Insurance	CE
001	0	CE-CE-BE	Construction Execution Budget	Line

At the bottom of the form, the 'Total Amount' is displayed as '\$0.00', which is circled in red. The 'Send' button in the top right corner is also circled in red. The 'Line Item Details' panel on the right shows fields for 'EDGE Certified Prime Contractor?' (Yes), 'Subcontractor/Supplier' (Type a Subcontractor/Supplier...), and 'EDGE Certified?'. The 'Notes' field is empty. The 'Cancel', 'Save', and 'Save & Add New' buttons are at the bottom of the panel.



# Completed Form

- ▶ Verify the Workflow Action: **Submit**
- ▶ Click **Send**

Create New Change Order - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uco/1006/3754?\_\_uref=uuu3334...

### Create Workflow Action Details

**Action Details**

Workflow Actions \* **Submit** Send For AE Review

To Archana Atrey;Brett Gundlach;Cindy Pizzuto;Consultant Student1;Consultant Student10;Consult...

CC Start typing for suggestions...

**Due Date Details**

Task Due Date

Task Due Date is not available

Cancel **Send**



# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211

