



Contract SOV (Schedule of Values)- OA K12 Cloud

Contract SOV Process Overview

- ▶ After the Contract is approved in OAKS CI, the Contract SOV record will be created by the Project Coordinator (PC).
- ▶ The Professional Services Provider will:
 - ▶ Locate and Complete the SOV Spreadsheet
 - ▶ Email the Spreadsheet to the PC
 - ▶ Receive and Review the Contract SOV record in OAKS CI

Navigate to SOV 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

The screenshot shows the OFCC (Ohio Facilities Construction Commission) website. The 'Documents' tab is selected in the navigation menu. Under 'Standard Forms', the 'Procurement' sub-tab is active. A table lists various templates, with the following row highlighted by a red box and pointed to by a red arrow:

Template Name	Version	File Name
OAKS CI Contract SOV Import Template - A/E (K-12 Cloud) [XLSM]	2015-NOV	M140-05-CI
OAKS CI Contract SOV Import Template - A/E (K-12) [XLSM]	2016-APR	M140-05-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (Cloud) [XLSM]	2015-NOV	M140-06-CI
OAKS CI Contract SOV Import Template - Commissioning Agent (K-12) [XLSM]	2015-NOV	M140-06-CI
OAKS CI Contract SOV Import Template - Contractor (Cloud) [XLS]	2015-NOV	M140-02-CI
OAKS CI Contract SOV Import Template - Contractor (K-12) [XLSM]	v0314	M140-07-CI
OAKS CI Contract SOV Import Template - Contractor (K-12 Cloud) [XLSM]	2016-APR	
OAKS CI Contract SOV Import Template - Owner Agent (Cloud) [XLSM]	2015-NOV	M140-08-CI
OAKS CI Contract SOV Import Template - Owner Agent (K-12) [XLSM]	2015-NOV	M140-08-CI
OAKS CI Contract SOV Import Template - Renovation Work (K-12) [XLSM]	v0314	M140-09-CI
OAKS CI Subcontractor Distribution Import Template - Contractor (K-12 Cloud) [XLSM]	2016-APR	

Enter Contract SOV Line Items

- ▶ Step 2:
 - ▶ Enter Contract SOV Line Items
 - ▶ Include **ONLY** EDGE Consultants
 - ▶ Make sure to spell the name of the Consultant **EXACTLY** the way you spelled it on the Subcontractor/Supplier Declaration

Prepare interface file

Code	Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent	EDGE Certified Prime Contractor?	Associated Building
			\$8,000.00				
	CM Adviser Services Summary						
	CM Adviser Services General	Owner's Agent Expenses	\$8,000.00	My Consultants	15	Yes	High School Renovation
	CM Adviser Services Budget						
	CM Contract Awarded SOV Pending						
	CM Basic Services						
	CM Program Verification Services						
	CM Schematic Design Services						
	CM Design Development Services						
	CM Construction Docs Services						
	CM Bid and Award Services						
	CM Construction Admin Services						
	CM Closeout Services						
	CM Direct Personnel Expense						
	CM Additional Services						
	CM Constructability Review						
	CM Scheduling Services						
	CM Temporary Facilities						
	CM Partnering Facilitation						
	CM Site Surveying Services						
	CM Geotechnical Investigation						
	CM Environmental Survey						
	CM Hazardous Materials Survey						
	CM Measurement and Verification						
	CM Warranty Services						

Adding Additional Lines

- ▶ Step 3: 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 titled "M140-08-CI-Contract_SOV_Template-OwnerAgent-K12_V2-01 (4) CLOUD - Excel". The spreadsheet has columns C through H and rows 1 through 31. Row 15 is highlighted, and a context menu is open over it. The menu options are: Cut, Copy (circled in red), Paste Options, Paste Special..., Insert, Delete, Clear Contents, Format Cells..., Row Height..., Hide, Unhide. A red arrow points to row 13, which contains "Verification Services".

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent
CM-00-00	CM Adviser Services Summary		\$0.00		
CM-CM-00	CM Adviser Services General				
CM-CM-BE	CM Adviser Services Budget				
CM-CM-SV	CM Contract Awarded SOV Pending				
CM-BS-00	CM Basic Services				
CM-BS-00	Verification Services				
CM-BS-00	Design Services				
CM-BS-DD	CM Design Development Services				
CM-BS-DD	CM Construction Docs Services				
CM-BS-DD	CM Bid and Award Services				
CM-BS-DD	CM Construction Admin Services				
CM-BS-DD	CM Closeout Services				
CM-BS-DD	CM Direct Personnel Expense				
CM-AS-00	CM Additional Services				
CM-AS-00	CM Constructability Review				
CM-AS-00	CM Scheduling Services				
CM-AS-00	CM Temporary Facilities				
CM-AS-00	CM Partnering Facilitation				
CM-AS-00	CM Site Surveying Services				
CM-AS-00	CM Geotechnical Investigation				
CM-AS-00	CM Environmental Survey				
CM-AS-00	CM Hazardous Materials Survey				
CM-AS-00	CM Measurement and Verification				
CM-AS-00	CM Warranty Services				
CM-AS-OT	CM Other Additional Services				

Adding Additional Lines

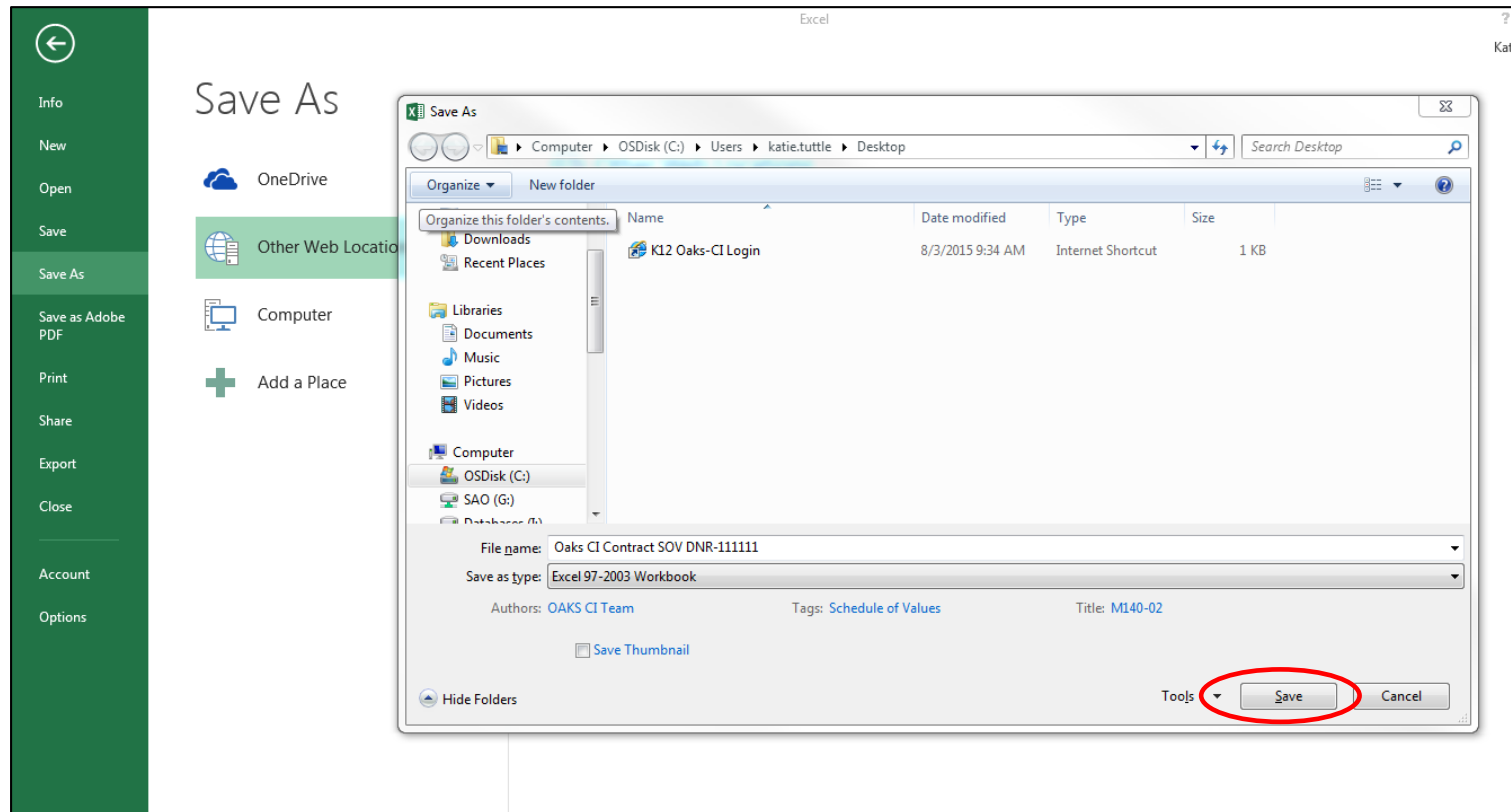
- ▶ Step 3 (cont.):
 - ▶ Right click on the line you want to be **below** the line you are inserting
 - ▶ Choose insert copied cells
 - ▶ Your line will show up above the selected line. You can edit the text in the line as necessary

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. The text box contains the text 'New line will appear above here'.

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
			\$94.00		
CE-00-00	Construction Execution Summary				
CE-01-00	General Requirements				
CE-01-IN	CE Insurance				
CE-01-SB	CE Surety Bonds	surety bonds	\$25.00	bill's concrete	
CE-01-SC	CE Scheduling Services				
CE-01-PF	CE Partnering Facilitation				
CE-01-MBL	CE Mobilization Labr				
CE-01-MBM	CE Mobilization Matl	Trucks Mtl	\$35.00		
CE-01-TFL	CE Temporary Facilities Labr				
CE-01-TFM	CE Temporary Facilities Matl				
CE-01-LCL	CE Lead Contractor Services Labr				
CE-01-LCM	CE Lead Contractor Services Matl				
CE-01-CLL	CE Closeout Labr				
CE-01-CLM	CE Closeout Matl				
CE-01-OTL	CE General Conditions Labr				
CE-01-OTM	CE General Conditions Matl				
CE-FC-00	Facility Construction				
CE-FC-02L	Existing Conditions Labr				
CE-FC-02M	Existing Conditions Matl				
CE-FC-03L	Concrete Labr				
CE-FC-03M	Concrete Matl				
CE-FC-04L	Masonry Labr				
CE-FC-04M	Masonry Matl				
CE-FC-05L	Metals Labr				
CE-FC-05M	Metals Matl				
CE-FC-06L	Wood Plastic and Composite Labr				
CE-FC-06M	Wood Plastic and Composite Matl				
CE-FC-07L	Thermal and Moisture Protn Labr				
CE-FC-07M	Thermal and Moisture Protn Matl				
CE-FC-08L	Openings Labr				
			\$34.00		

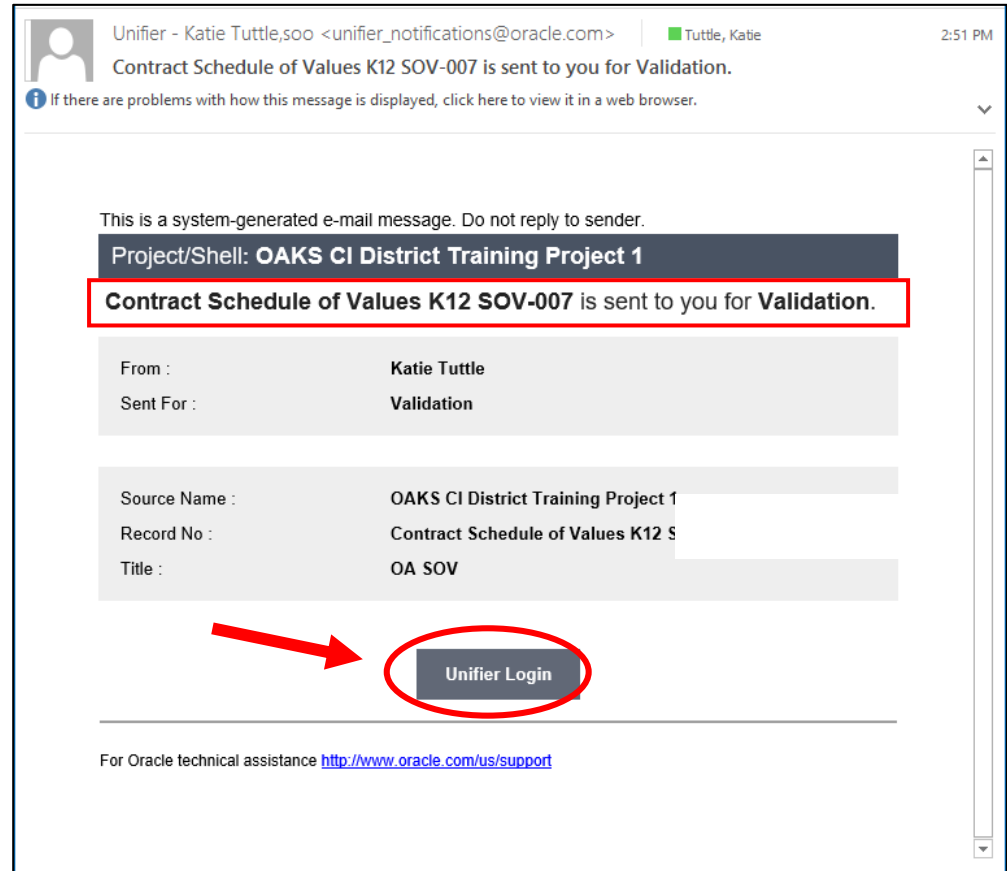
Save and Email your Spreadsheet

- ▶ Step 4:
 - ▶ Name and Save the Spreadsheet
 - ▶ Email the Spreadsheet to your Project Manager and Project Coordinator for review



Contract SOV Record

- ▶ The Contract SOV record will be created by the Project Coordinator and will be sent to you for review
- ▶ You will receive an email notification that you have a Task Pending that needs your attention
- ▶ Click on the link to access your Task



Accept the Task

- ▶ Click Accept Task to begin reviewing the record

Contract Schedule of Values K12 - OA SOV - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=19&model=ucsovk&fromcostlog=1&project_id=1084&nfi=0&__uref=uuu211:navi 110%

File Edit View Actions Help

Accept Task Decline Task Cash Flow Review Close Window

Contract Schedule of Values K12

General

General

Project Number: SFC-080001 Record Number: SOV-007
Project Name: OAKS CI District Training Project 1 Creator: Katie Tuttle
Organization Name: OAKS CI District Training Project - 1 Creation Date: 06/23/2017 11:50 AM (UTC-8)
Facility Name: Status: Pending

Task Details

From: Katie Tuttle Task Due Date:
To: Owner's Agent Task Status: Not Started
Cc:
Sent For: Validation

Task Notes (0)
Workflow Progress

Contracts SOV Details

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI Percent	Subcontractor Supplier	EDGE Certified?
005	CM-BS-BA	CM Bid and Award Services	pre design	\$175,000.00	0		
004	CM-AS-BE	CM Additional Services Budg	closeout services	\$100,000.00	0		
003	CM-BS-BA	CM Bid and Award Services	pre design	\$150,000.00	0		

Grid Find Show Filtered Total Amount **Total Amount:** \$575,000.00

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

Review the Task

- ▶ Review the SOV record to ensure all information is correct
- ▶ Choose Workflow Action: Accept or Return for Clarification
- ▶ Click Send

Contract Schedule of Values K12 - OA SOV - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187050&model=ucsov&project_id=1084&initiateBP=&bulkautoaccept=&fromR 110%

File Edit View Actions Help

Workflow Actions Validated Send Save Spelling.. Add Attachment Discussion Cash Flow Review Close Window

General Validated Return for Clarification

Contract Schedule of Values K12

Validate the EDGE and LFI information submitted in this schedule of values.

General

Project Number: SFC-080001 Record Number: SOV-007

Project Name: OAKS CI District Training Project 1 Creator: Katie Tuttle

Action Details

Validated (Click here to view latest content)

To... Archana Atrey, Barbara Taylor, Bill Schwertfager,

Cc...

Send For: PM Approval

Task Notes:

Workflow Progress

Contracts SOV Details

Current View: All Show Currency in: Transaction Currency

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

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI Percent	Subcontractor Supplier	EDGE Certified?
005	CM-BS-BA	CM Bid and Award Services	pre design	\$175,000.00	0		
004	CM-AS-BE	CM Additional Services Budget	closeout services	\$100,000.00	0		

Add Copy Import Remove Grid Find Show Filtered Total Amount Total Amount: 0

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

Requesting Payment

- ▶ Once the Contract SOV has been approved in OAKS CI, you will have the ability to create an Application for Payment
- ▶ For more information please see the [Application for Payment Job Aid](#)

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211