



# **Contract SOV**

## **K-12**



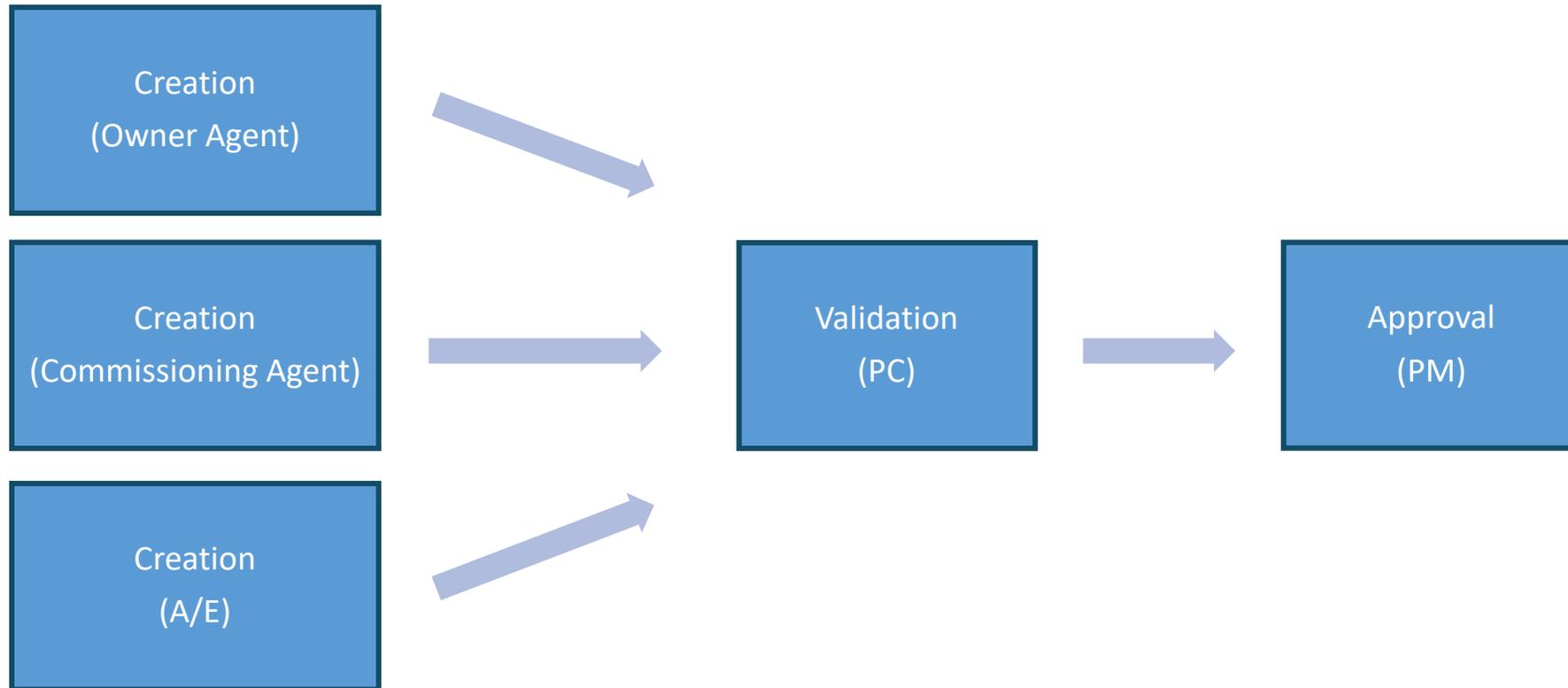
# Contract Schedule of Values



# Contract SOV

*Click the boxes to navigate directly to any section*

## ▶ Workflow Steps



# **Contract Schedule of Values (Owner Agent)**



# Contract SOV Process Overview (OA)

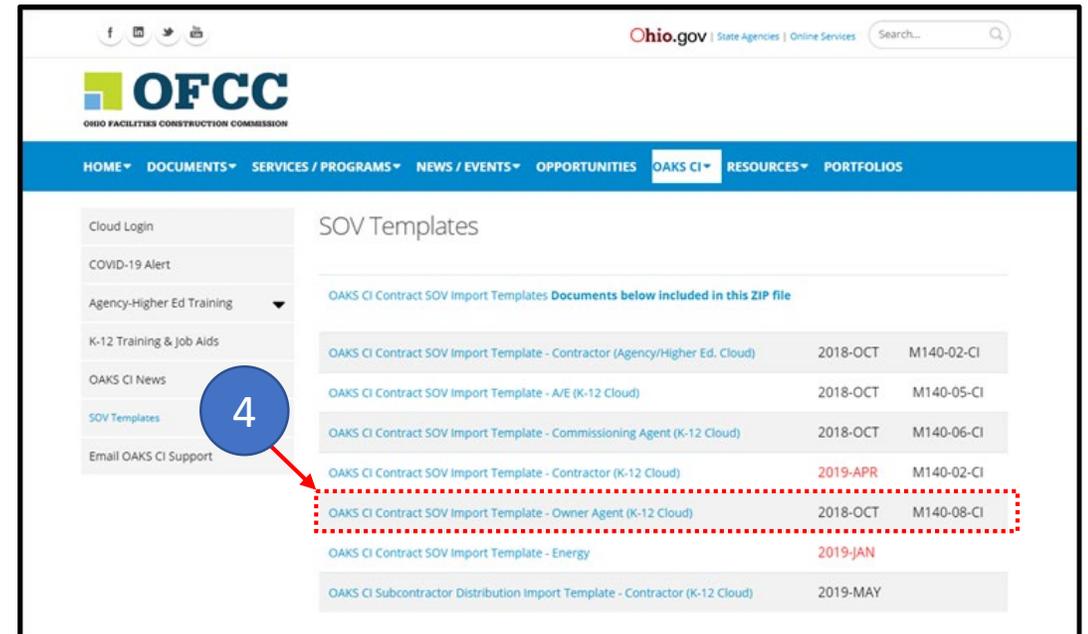
- ▶ The Owner Agent will:
  - ▶ Locate and Complete the SOV Spreadsheet
  - ▶ Email the Spreadsheet to the PC
  - ▶ Receive and Review the Contract SOV record in OAKS CI



# Navigate to SOV Spreadsheet Template

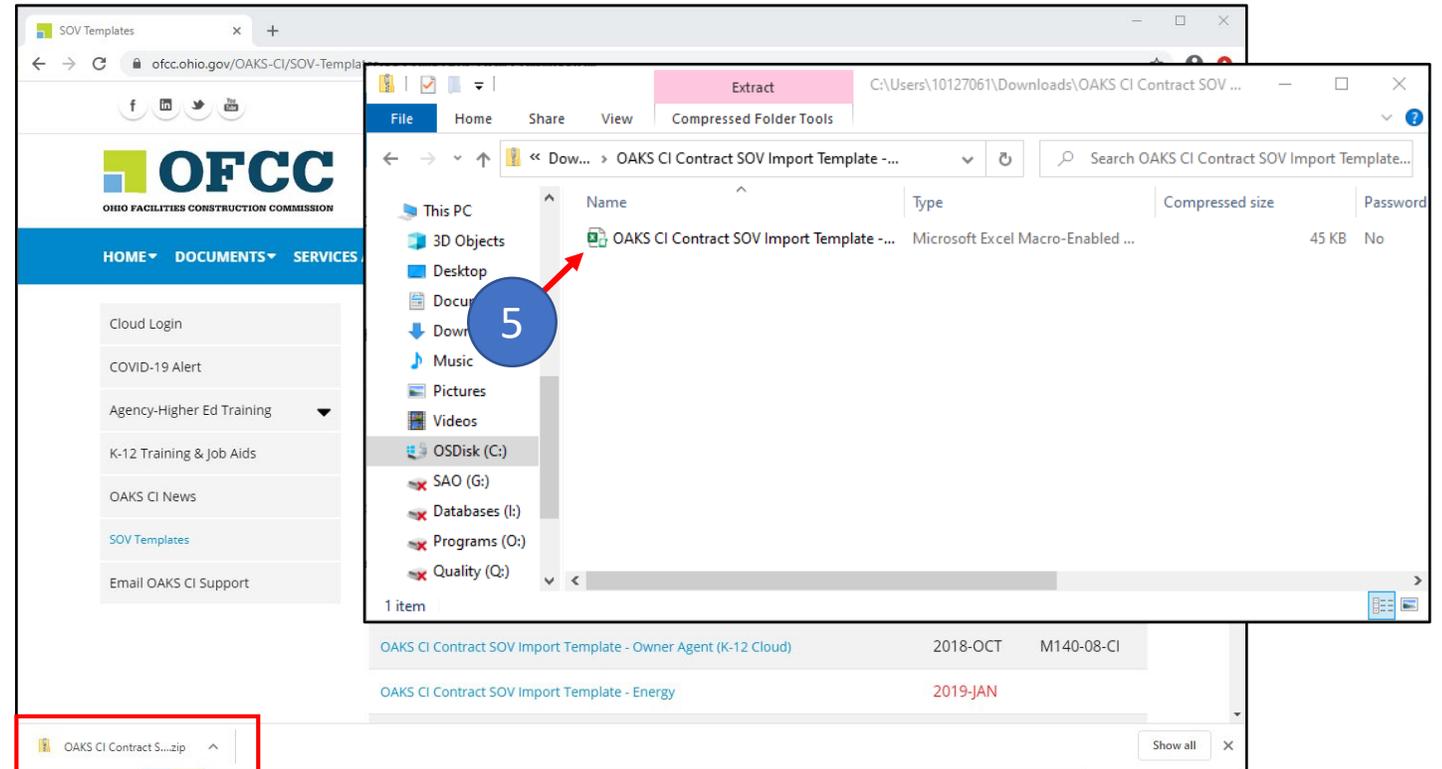
To view additional job aids and training materials for OAKS CI:

1. Navigate to [ofcc.ohio.gov](http://ofcc.ohio.gov)
2. Mouse over the OAKS CI tab
3. Click **SOV Templates**
4. Click the appropriate template to download the Excel Spreadsheet



# Open SOV Spreadsheet Template

5. Open the downloaded Excel spreadsheet



# Enter Contract SOV Line Items

- ▶ Enter Contract SOV Line Items
- ▶ 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

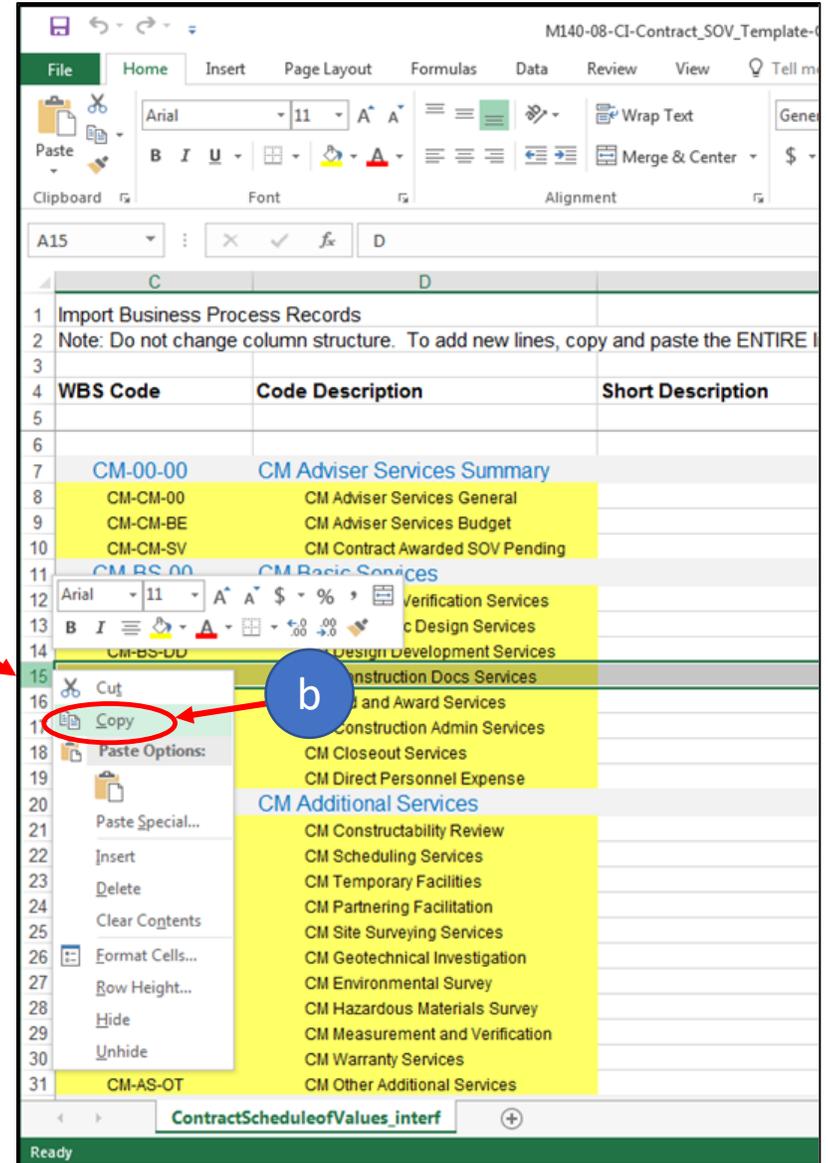
The screenshot shows an Excel spreadsheet with the following table structure:

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 Monthly Services						



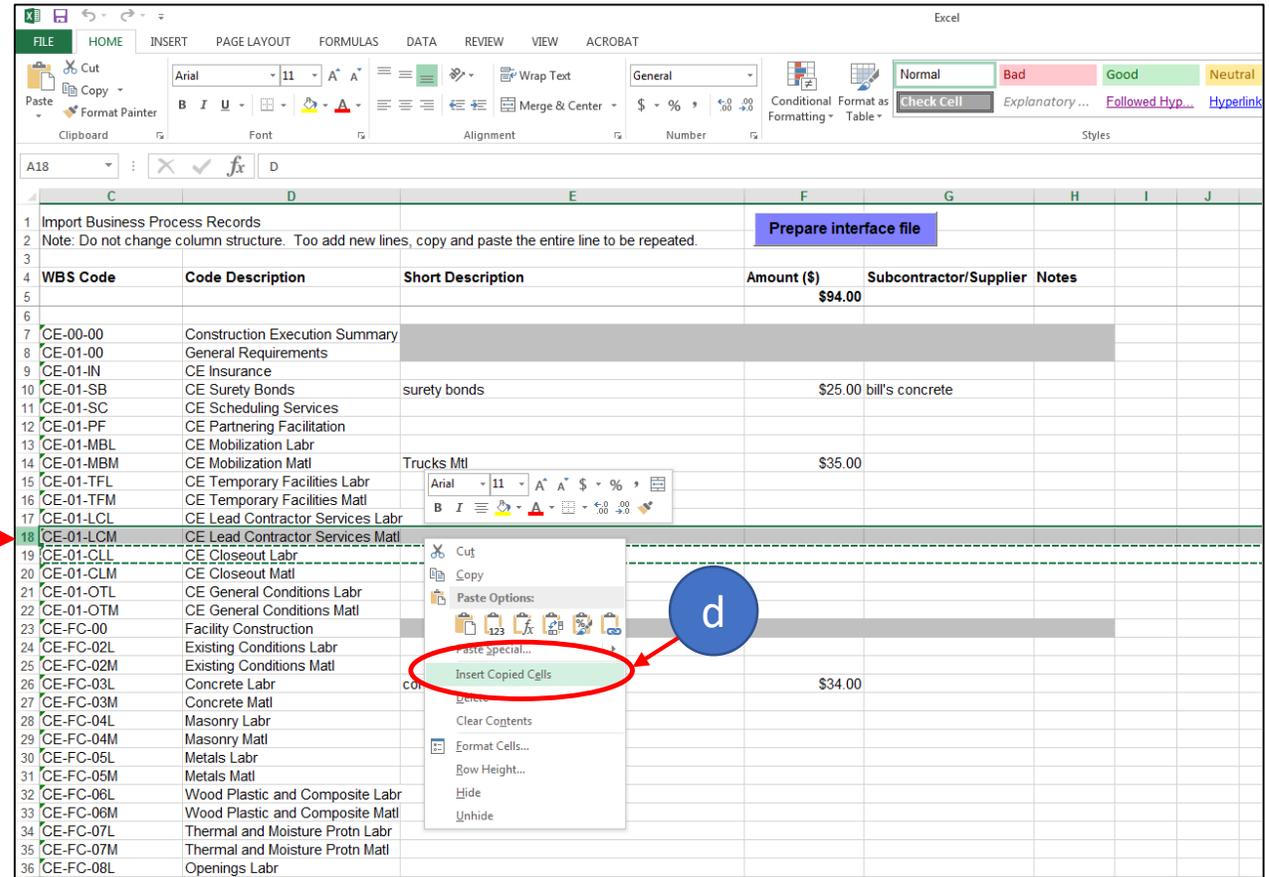
# Adding Additional Lines

- ▶ If necessary, add additional lines to the SOV spreadsheet
  - a) Left click on the number of the line to highlight it
  - b) Right click and choose copy



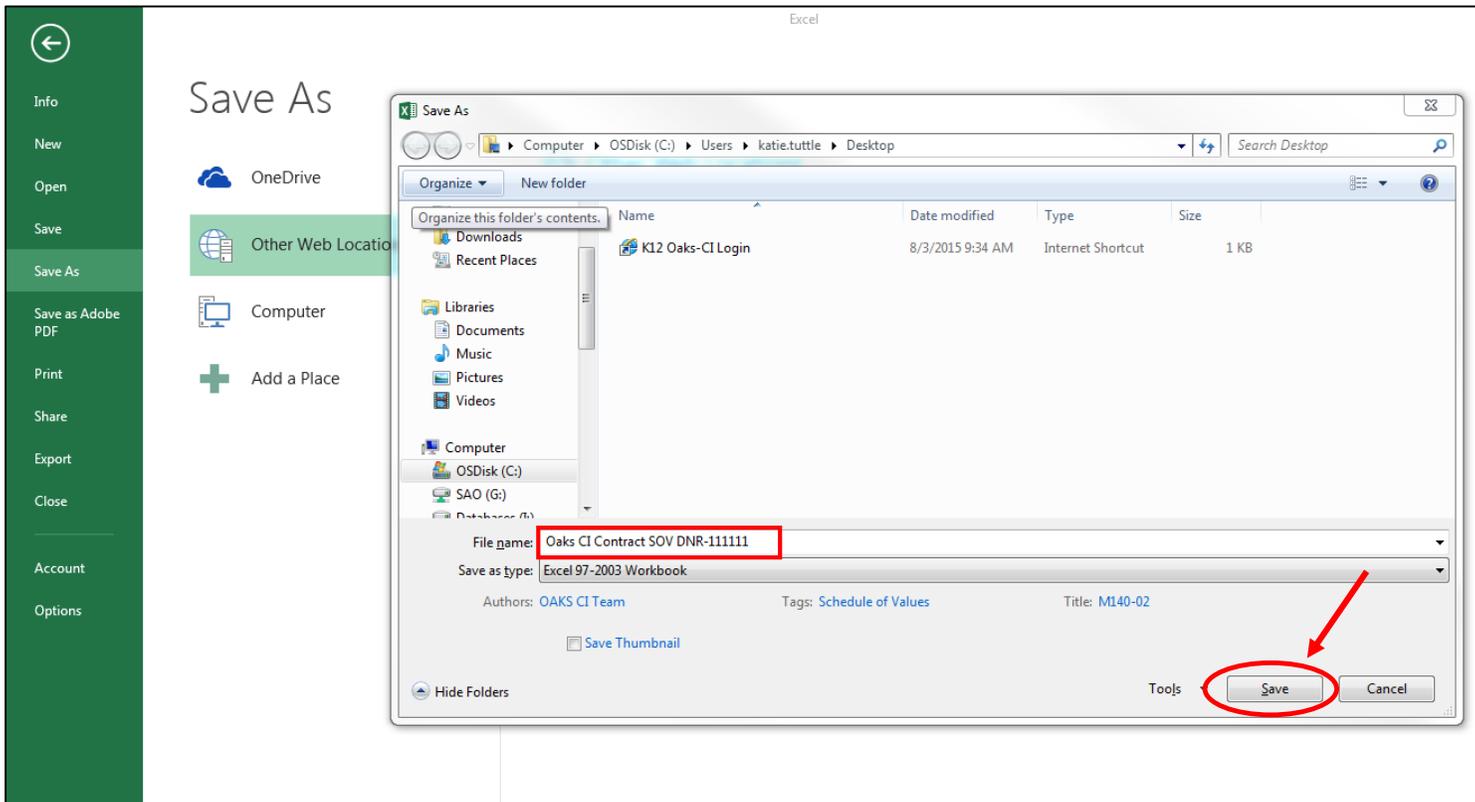
# Adding Additional Lines

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



# Save and Email your Spreadsheet

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

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

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

**Contract Schedule of Values K12 SOV-008 is sent to you for Validation.**

From : Matthew Weber  
Sent For : Validation

Source Name : OAKS CI District Training Project 1  
Record No : Contract Schedule of Values K12 SOV-008  
Title : SOV CTL Engineering

[Unifier Login](#)



# Accept the Task

- ▶ Click Accept to begin reviewing the record

Contract Schedule of Values K12 - OA SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207707?task\_id=207707&parent\_id=0&viewOnly=0&project\_id=1084&model=ucsovkn...

### Contract Schedule of Values K12

[Accept](#) [Decline](#) ☰

**General** Contracts SOV Details

**Task Details**

**From**  
Matthew Weber

**To**  
Matthew Weber

**Sent For**  
Validation

**General**

<b>Project Number</b> SFC-080001	<b>Record Number</b> SOV-009
<b>Project Name</b> OAKS CI District Training Project 1	<b>Creator</b> Matthew Weber

**Attachments** Comments Linked Records >

**i**  
Information  
No Attachments.



# Review the Task

- a) Review the General section of the SOV
- b) Review the Contract Information section of the SOV
- c) Review Notes
- d) Review any Attachments

Contract Schedule of Values K12 - OA SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/ucsovsk/21/0...=218&model=ucsovsk&fromcostlog...

Contract Schedule of Values K12

Send Save

General Contracts SOV Details

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

**Attachments**

**a**

**b**

**c**

**d**

**Information**  
No Attachments.

General	
Project Number	Record Number
SFC-080001	SOV-009
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project - 1	05/21/2020 03:26 AM (UTC-5)
Facility Name	Status
	Pending
Title *	
OA SOV - UI	

Contract Information	
Contract No.	Contractor Name
SFC-080001-02-01 Test	Dynamix Engineering
Trade	Total Contract Amount
	575,000.00
EDGE Certified Prime?	Line Item Total (\$)
	575,000.00
Selection Method	Difference (\$)
	0.00

Notes



# Review the Task

- e) Click the Contract SOV Details tab
- f) Review the line items

The screenshot shows a web browser window with the title 'Contract Schedule of Values K12 - OA SOV - UI - Project No. SFC-080001 - Google Chrome'. The URL is 'ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/ucsovkv/21/0/0?srcid=21&model=ucsovkv&fromcostlog=1&project\_id=1084&nfi=0&\_uref=uuu71...'. The page displays a 'Contract Schedule of Values K12' interface. A blue circle with the letter 'e' points to the 'Contracts SOV Details' tab. A blue circle with the letter 'f' points to the 'Line Item Details' tab. A red box highlights a table of line items. The table has columns: No., WBS Code, Code Name, Short Description, Amount (\$), and LFI P... The table contains five rows of data. Below the table, a 'Total Amount' is shown as 575,000.00. On the right side, the 'Line Item Details' form is visible, showing fields for WBS Code (CM-BS-BA), Code Name (CM Bid and Award Services), Short Description (pre design), Amount (\$) (175,000.00), Subcontractor/Supplier, LFI Percent (0), District (Oak Hills Local SD), Associated Building, and Facility Name. There are 'Cancel' and 'Save' buttons at the bottom right of the form.

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI P...
005	CM-BS-BA	CM Bid and Award Se...	pre design	175,000.00	0
004	CM-AS-BE	CM Additional Services ...	closeout services	100,000.00	0
003	CM-BS-CA	CM Construction Admin...	Construction execution	150,000.00	0
002	CM-BS-SD	CM Schematic Design ...	construction admin	50,000.00	0
001	CM-BS-CL	CM Closeout Services	Bid and Award	100,000.00	0



# Review the Task

- g) When the record is ready to move forward, click the **Send** button

The screenshot shows a web browser window with the title 'Contract Schedule of Values K12 - OA SOV - UI - Project No. SFC-080001 - Google Chrome'. The URL is 'ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/open/ucsov/21/0/0?srcid=21&model=ucsov&fromcostl...'. The page title is 'Contract Schedule of Values K12'. A blue circle with a white 'g' is positioned over the top right corner of the page content, with a red arrow pointing to a red circle around the 'Send' button in the top right navigation area. The 'Send' button is part of a 'Send Save' group. Below the navigation, there are tabs for 'General' and 'Contracts SOV Details'. The main content area has a heading 'Validate the EDGE and LFI information submitted in this schedule of values.' and a 'General' section with the following fields:

Project Number	SFC-080001	Record Number	SOV-009
Project Name	OAKS CI District Training Project 1	Creator	Matthew Weber
Organization Name	OAKS CI District Training Project - 1	Creation Date	05/21/2020 03:26 AM (UTC-5)
Facility Name		Status	Pending
Title *	OA SOV - UI		

On the right side, there is an 'Attachments' section with a plus icon and a minus icon. Below it, there is an information icon and the text 'Information No Attachments.'



# Review the Task

## h) Select the Workflow Action

- ▶ Choose **Validated** to move the record forward to the PM for Approval
- ▶ Choose **Return for Clarification** for update

## i) Click **Send**

The image displays two screenshots of a web application interface, specifically the 'Workflow Action Details' dialog box. The top screenshot shows the 'Workflow Actions' dropdown menu with 'Validated' and 'Return for Clarification' options highlighted by a red box. A blue circle with the letter 'h' and a red arrow points to the dropdown. The bottom screenshot shows the 'Validated' option selected in the dropdown, with the 'Send For' field set to 'PM Approval'. A blue circle with the letter 'i' and a red arrow points to the 'Send' button at the bottom right of the dialog box.



# Requesting Payment

- ▶ Once the Contract SOV has been approved in OAKS CI, you will have the ability to create an Application for Payment



# **Contract Schedule of Values (Commissioning Agent)**



# Contract SOV Process Overview (Cx)

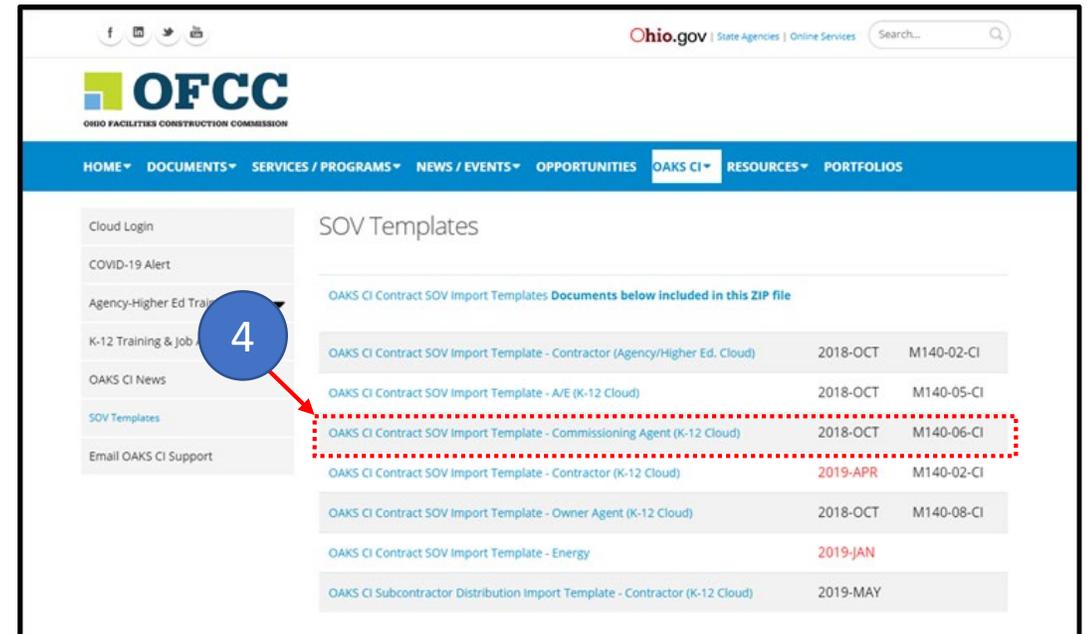
- ▶ The Commissioning Agent will:
  - ▶ Locate and Complete the SOV Spreadsheet
  - ▶ Email the Spreadsheet to the PC
  - ▶ Receive and Review the Contract SOV record in OAKS CI



# Navigate to SOV Spreadsheet Template

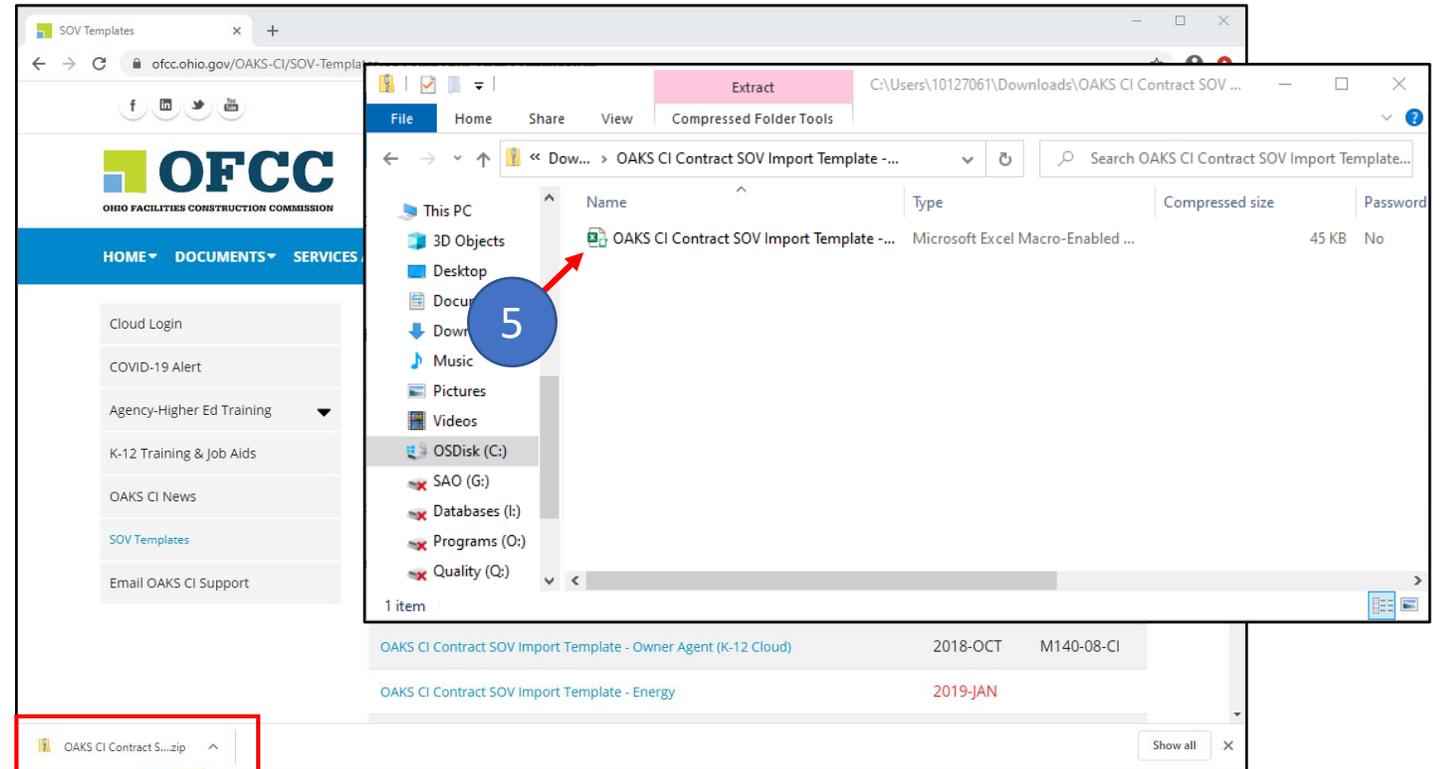
To view additional job aids and training materials for OAKS CI:

1. Navigate to [ofcc.ohio.gov](http://ofcc.ohio.gov)
2. Mouse over the OAKS CI tab
3. Click **SOV Templates**
4. Click the appropriate template to download the Excel Spreadsheet



# Open SOV Spreadsheet Template

5. Open the downloaded Excel spreadsheet



# Enter Contract SOV Line Items

- ▶ Enter Contract SOV Line Items
- ▶ 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 LP	Percent	EDGE Certified Prime Contractor?	Associated Building	Notes
			\$0.00					
<b>Cx Basic Services</b>								
Cx-BS-PV	Cx Program Verification Services	<Building Name> Schematic	\$0.00		0			Building Fee
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Eco Charrette	\$0.00		0			\$ -
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Design Drawing	\$0.00		0			
Cx-BS-DD	Cx Design Development Services	<Building Name> Owners Design Intent Narrative	\$0.00		0			
Cx-BS-DD	Cx Design Development Services	<Building Name> A/E Basis of Design Review	\$0.00		0			
Cx-BS-DD	Cx Design Development Services	<Building Name> Energy Modeling Review	\$0.00		0			
Cx-BS-CD	Cx Construction Docs Services	<Building Name> Construction Drawing	\$0.00		0			
Cx-BS-CD	Cx Construction Docs Services	<Building Name> Cx Plan	\$0.00		0			
Cx-BS-CD	Cx Construction Docs Services	<Building Name> LEED Documentation	\$0.00		0			
Cx-BS-BA	Cx Bid and Award Services							
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Pre-Functional Testing	\$0.00		0			15
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Functional Testing	\$0.00		0			25
Cx-BS-CA	Cx Construction Admin Services	<Building Name> 1st Report Delivery	\$0.00		0			5
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Seasonal Testing	\$0.00		0			5
Cx-BS-CA	Cx Construction Admin Services	<Building Name> Construction Phase Final Cx Rep	\$0.00		0			7
Cx-BS-CE	Cx Construction Execution							
Cx-BS-CL	Cx Closeout Services	<Building Name> Re-Cx Plan	\$0.00		0			1
Cx-BS-CL	Cx Closeout Services	<Building Name> Owners Systems Manual	\$0.00		0			5
Cx-BS-CL	Cx Closeout Services	<Building Name> Final Commissioning Report	\$0.00		0			2
Cx-AS-PD	Cx Post Occupancy Evaluation	<Building Name> Trend Report	\$0.00		0			1
Cx-AS-WS	Cx Warranty Services	<Building Name> Correction Period Inspection	\$0.00		0			8
<b>Cx Additional Services</b>								
Cx-AS-DT	Cx Demonstration and Training							
Cx-AS-WS	Cx Warranty Services							
Cx-AS-PD	Cx Post Occupancy Evaluation							
Cx-AS-DT	Cx Other Additional Services							
<b>Cx Reimbursable Expense</b>								
Cx-RE-OT	Cx Other Reimbursable Expense							



# Adding Additional Lines

- ▶ If necessary, add additional lines to the SOV spreadsheet
  - a) Left click on the number of the line to highlight it
  - b) Right click and choose copy

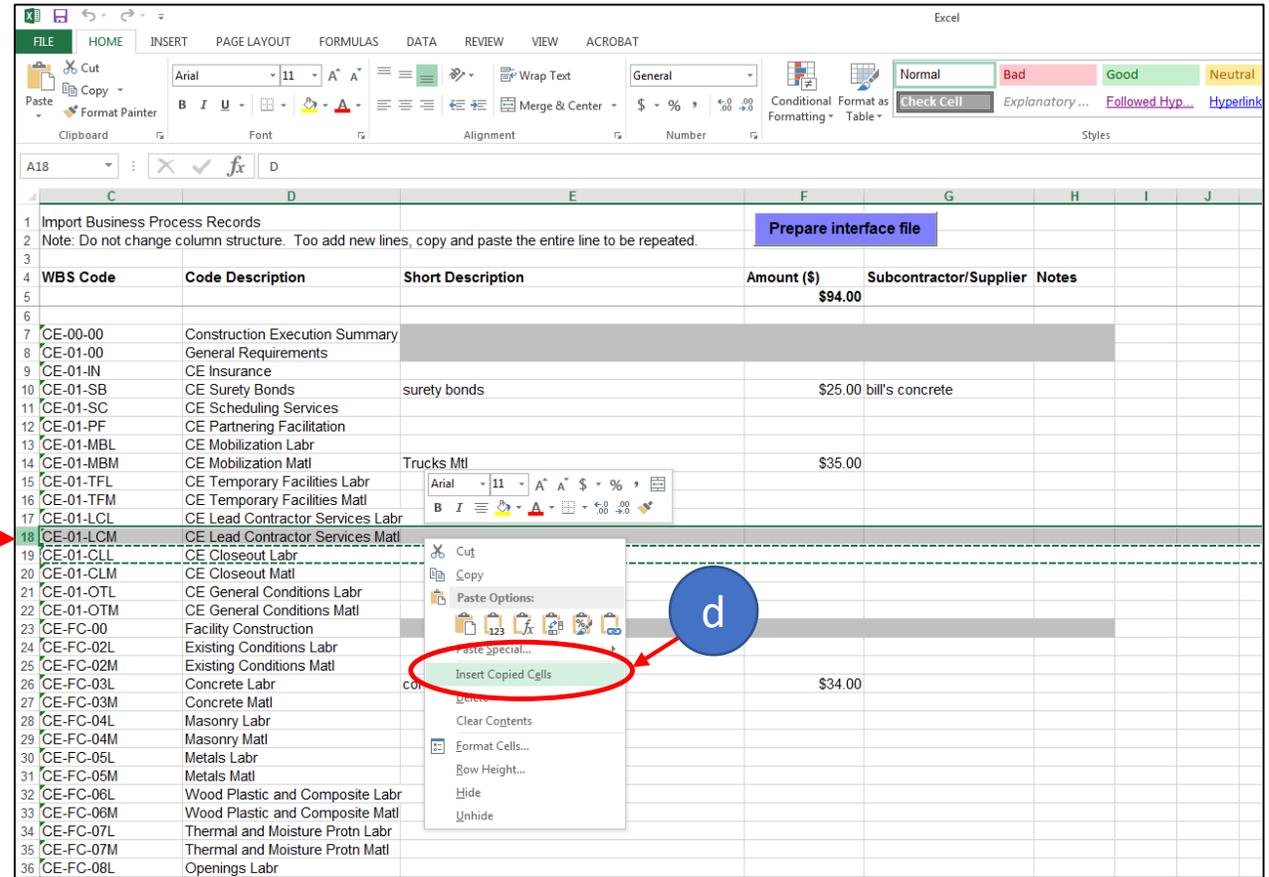
The screenshot shows an Excel spreadsheet titled "M140-06-CI-Contract". The spreadsheet contains a table with the following columns: "WBS Code", "Code Description", "Short Description", "Amount (\$)", and "Su". The table is divided into sections: "Cx Basic Services" (rows 9-15), "Cx Development Services" (rows 16-21), "Cx Construction Admin Services" (rows 22-28), "Cx Closeout Services" (rows 29-32), "Cx Additional Services" (rows 33-35), and "Cx Reimbursable Expense" (rows 36-37). A context menu is open over row 15, with the "Copy" option highlighted. Red circles and arrows labeled "a" and "b" indicate the steps: "a" points to the row number "15" and "b" points to the "Copy" option in the context menu.

WBS Code	Code Description	Short Description	Amount (\$)	Su
Cx-BS-00	Cx Basic Services		\$0.00	
Cx-BS-PV	Cx Program Verification Services	<Building Name> Schematic	\$0.00	
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Eco Charrette	\$0.00	
Cx-BS-SD	Cx Schematic Design Services	<Building Name> Design Drawing	\$0.00	
		<Building Name> Owners Design Intent Narrative	\$0.00	
		<Building Name> A/E Basis of Design Review	\$0.00	
		<Building Name> Energy Modeling Review	\$0.00	
		<Building Name> Construction Drawing	\$0.00	
		<Building Name> Cx Plan	\$0.00	
		<Building Name> LEED Documentation	\$0.00	
		<Building Name> Pre-Functional Testing	\$0.00	
		<Building Name> Functional Testing	\$0.00	
		<Building Name> 1st Report Delivery	\$0.00	
		<Building Name> Seasonal Testing	\$0.00	
		<Building Name> Construction Phase Final Cx Rep	\$0.00	
		<Building Name> Re-Cx Plan	\$0.00	
		<Building Name> Owners Systems Manual	\$0.00	
		<Building Name> Final Commissioning Report	\$0.00	
		<Building Name> Trend Report	\$0.00	
		<Building Name> Correction Period Inspection	\$0.00	
Cx-RE-00	Cx Reimbursable Expense			



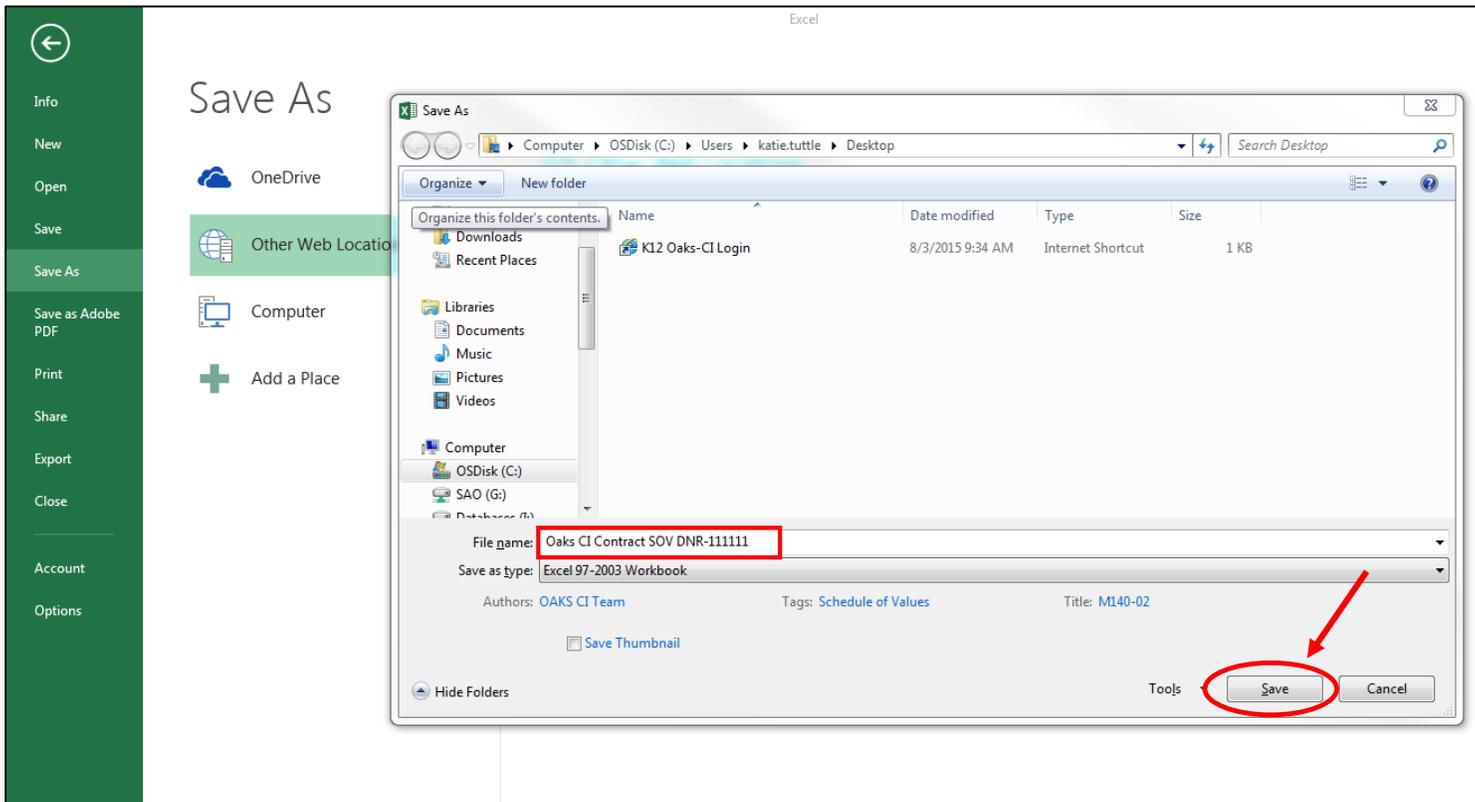
# Adding Additional Lines

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



# Save and Email your Spreadsheet

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

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

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

**Contract Schedule of Values K12 SOV-008 is sent to you for Validation.**

From : Matthew Weber  
Sent For : Validation

Source Name : OAKS CI District Training Project 1  
Record No : Contract Schedule of Values K12 SOV-008  
Title : SOV CTL Engineering

[Unifier Login](#)



# Accept the Task

- ▶ Click Accept to begin reviewing the record

Contract Schedule of Values K12 - CxA SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207713?task\_id=207713&parent\_id=0&viewOnly=0&project\_...

Contract Schedule of Values K12

Accept Decline

General Contracts SOV Details

Task Details

From  
Matthew Weber

To  
Matthew Weber

Sent For  
Validation

General

Project Number SFC-080001	Record Number SOV-011
Project Name OAKS CI District Training Project 1	Creator Matthew Weber

Attachments Comments Linked

Information  
No Attachments.



# Review the Task

- a) Review the General section of the SOV
- b) Review the Contract Information section of the SOV
- c) Review Notes
- d) Review any Attachments

The screenshot displays a web application interface for reviewing a Contract Schedule of Values (SOV). The page title is "Contract Schedule of Values K12" and the URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207713/undefined?\_uref=uuu714771907t3". The page is divided into several sections:

- General Section (Callout a):** Contains fields for Project Number (SFC-080001), Record Number (SOV-011), Project Name (OAKS CI District Training Project 1), Creator (Matthew Weber), Organization Name (OAKS CI District Training Project - 1), Creation Date (05/21/2020 04:08 AM (UTC-5)), Facility Name, Status (Pending), and Title (CxA SOV - UI).
- Contract Information Section (Callout b):** Contains fields for Contract No. (SFC-080001-02-01 Test), Contractor Name (Dynamix Engineering), Trade, Total Contract Amount (575,000.00), EDGE Certified Prime?, Line Item Total (\$) (575,000.00), Selection Method, and Difference (\$) (0.00).
- Notes Section (Callout c):** A text area for entering notes.
- Attachments Section (Callout d):** A sidebar on the right with an "Attachments" tab and an "Information" icon. The information icon shows "No Attachments".

Callouts are represented by blue circles with white text: 'a' and 'b' are on the left with red brackets; 'c' is at the bottom right with a red arrow; 'd' is at the top right with a red arrow pointing to the Attachments tab.



# Review the Task

- e) Click the Contract SOV Details tab
- f) Review the line items

The screenshot displays the 'Contract Schedule of Values K12' interface. The browser title is 'Contract Schedule of Values K12 - CxA SOV - UI - Project No. SFC-080001 - Google Chrome'. The URL is 'ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207713/undefined/undefined?\_uref=uuu714771907t3'. The page title is 'Contract Schedule of Values K12'. The 'General' tab is active, and the 'Contracts SOV Details' sub-tab is selected. The 'Line Item Details' sub-tab is also visible. A table of line items is shown, with the following data:

No.	WBS Code	Code Name	Short Description	Amount (\$)	LF
005	Cx-BS-PD	Cx Pre Design Services	pre design	175,000.00	
004	Cx-BS-CL	Cx Closeout Services	closeout services	100,000.00	
003	Cx-BS-CE	Cx Construction Execut...	Construction execution	150,000.00	
002	Cx-BS-CA	Cx Construction Admin ...	construction admin	50,000.00	
001	Cx-BS-BA	Cx Bid and Award Servi...	Bid and Award	100,000.00	

The total amount is 575,000.00. The details panel on the right shows the following information:

- WBS Code: Cx-BS-PD
- Code Name: Cx Pre Design Services
- Breakdown: [Empty]
- Short Description: pre design
- Amount (\$): 175,000.00
- Subcontractor/Supplier: [Empty]
- LFI Percent: 0
- District: Oak Hills Local SD
- Associated Building: [Empty]



# Review the Task

g) When the record is ready to move forward, click the **Send** button

Contract Schedule of Values K12 - CxA SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207713/undefined/undefined?\_\_uref=uuu714...

Contract Schedule of Values K12

General Contracts SOV Details

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

General

Project Number	Record Number
SFC-080001	SOV-011
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project - 1	05/21/2020 04:08 AM (UTC-5)
Facility Name	Status
	Pending

Title \*

CxA SOV - UI

Attachments

Information  
No Attachments.



# Review the Task

## h) Select the Workflow Action

- ▶ Choose **Validated** to move the record forward to the PM for Approval
- ▶ Choose **Return for Clarification** for update

## i) Click **Send**

The image displays two screenshots of a web application interface for a workflow action. The top screenshot shows the 'Workflow Action Details' dialog box with the 'Action Details' section expanded. The 'Workflow Actions' dropdown menu is open, showing 'Validated' and 'Return for Clarification' options. A red box highlights the 'Validated' option, and a blue circle labeled 'h' points to it. The bottom screenshot shows the same dialog box with 'Validated' selected in the dropdown. The 'Send For' field is populated with 'PM Approval'. The 'To' field contains a list of names: 'Archana Atrey; Jordan Zamy; Lance Witcher; Matthew Weber; Purna Irukulapati; Rita Nichols; Sho...'. The 'CC' field is empty. The 'Due Date Details' section shows 'Task Due Date' is not available. A blue circle labeled 'i' points to the 'Send' button at the bottom right of the dialog box.



# Requesting Payment

- ▶ Once the Contract SOV has been approved in OAKS CI, you will have the ability to create an Application for Payment



# **Contract Schedule of Values (A/E)**



# Contract SOV Process Overview (AE)

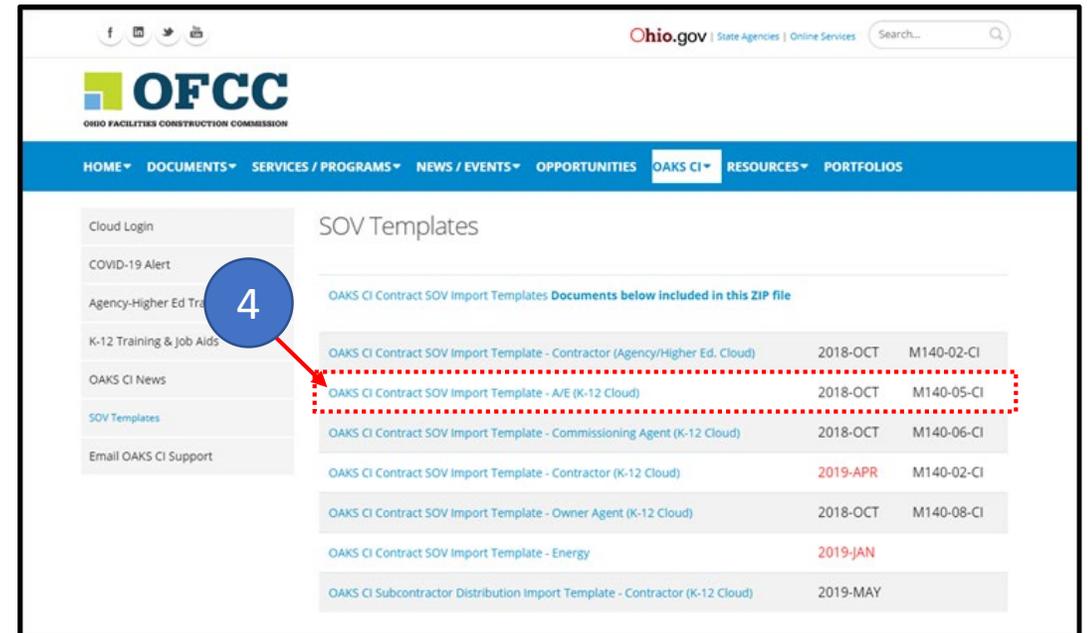
- ▶ After the Contract is approved in OAKS CI, the Contract SOV record will be created by the Project Coordinator (PC).
- ▶ The Professional Services Provider will:
  - ▶ Locate and Complete the SOV Spreadsheet
  - ▶ Email the Spreadsheet to the PC
  - ▶ Receive and Review the Contract SOV record in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



# Navigate to SOV Spreadsheet Template

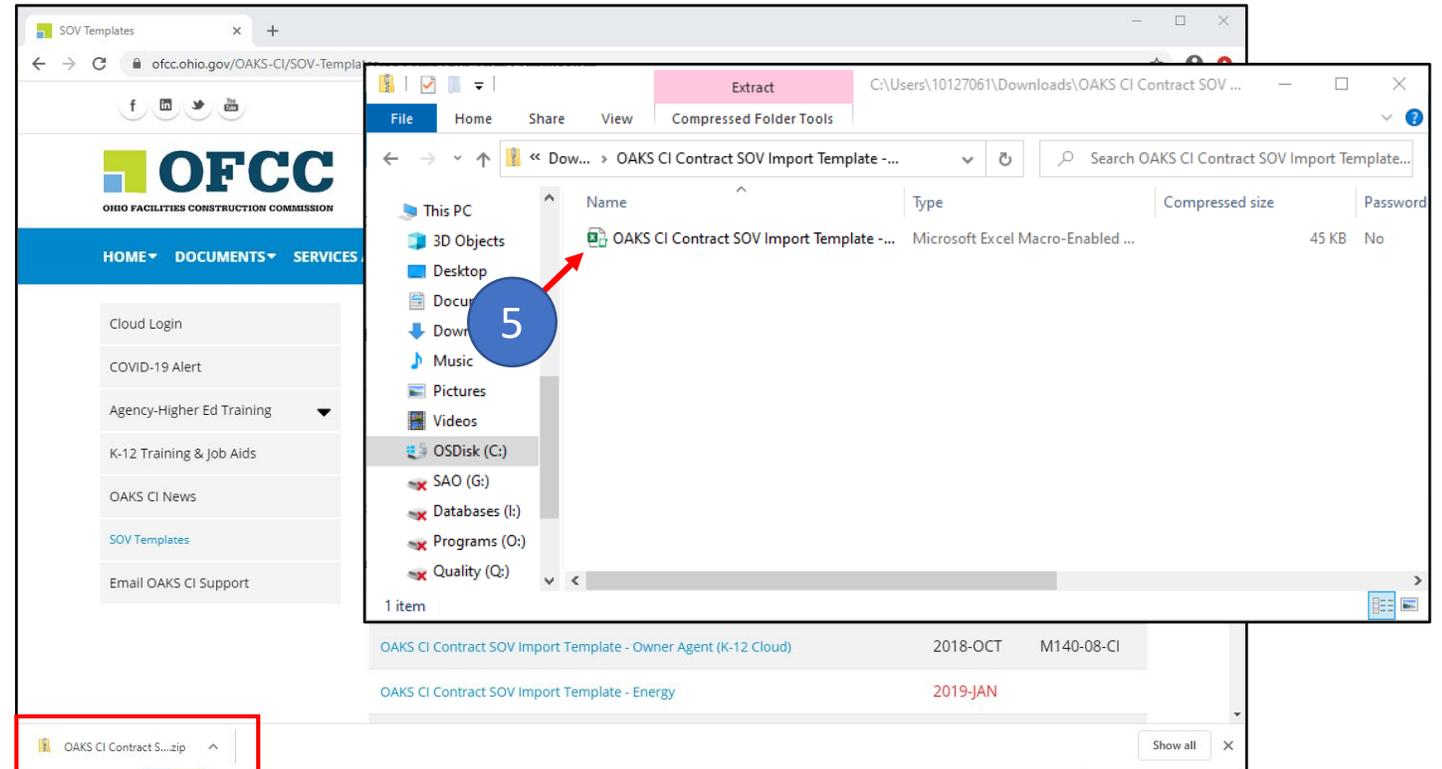
To view additional job aids and training materials for OAKS CI:

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4. Click the appropriate template to download the Excel Spreadsheet



# Open SOV Spreadsheet Template

5. Open the downloaded Excel spreadsheet



# Enter Contract SOV Line Items

- ▶ Enter Contract SOV Line Items
- ▶ 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	LFI Percent	EDGE Certified Prime Contractor?	Associated Building
			\$400.00				
<b>AE Basic Services</b>							
AE-BS-OM	AE Organizational Meeting Fee						
AE-BS-DS	AE Design Criteria Stage						
AE-BS-BV	AE Best Value Selection Fee						
AE-BS-PV	AE Program Verification Services						
12 AE-BS-SD	AE Schematic Design Services	Schematic Design	\$400.00	My Design Inc.		Yes	
AE-BS-DD	AE Design Development Services						
AE-SD-GA	AE GMP Negotiation Fee						
AE-BS-CD	AE Construction Docs Services						
AE-BS-BA	AE Bid and Award Services						
AE-BS-CN	AE Conformed Docs Services						
AE-BS-CA	AE Construction Admin Services						
AE-BS-CL	AE Closeout Services						
<b>AE Additional Services</b>							
AE-AS-BC	AE Basic Commissioning						
AE-AS-TI	AE Tests and Inspections						
AE-AS-LD	AE LEED Documentation Services						
AE-AS-CH	AE Charrette Facilitation						
AE-AS-EF	AE Eco Charrette Facilitation						
AE-AS-PF	AE Partnering Facilitation						
AE-AS-SU	AE Site Surveying Services						
AE-AS-GT	AE Geotechnical Investigation						
AE-AS-EN	AE Environmental Survey						
AE-AS-HM	AE Hazardous Materials Survey						
AE-AS-MV	AE Measurement and Verification						
AE-AS-CO	AE Change Order Fees						



# Adding Additional Lines

▶ If necessary, add additional lines to the SOV spreadsheet

- a) Left click on the number of the line to highlight it
- b) 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 Labr				
CE-01-LCM	CE Lead Contractor Services Matl				
CE-01-CLL	CE Closeout Labr				
CE-01-CLM	CE Closeout Matl				
CE-01-OTL	CE General Conditions Labr				
CE-01-OTM	CE General Conditions Matl				
CE-FC-00	Facility Construction				
CE-FC-02L	Existing Conditions Labr				
CE-FC-02M	Existing Conditions Matl				
CE-FC-03L	Concrete Labr		\$34.00		
CE-FC-03M	Concrete Matl				
CE-FC-04L	Masonry Labr				
CE-FC-04M	Masonry Matl				
CE-FC-05L	Metals Labr				
CE-FC-05M	Metals Matl				
CE-FC-06L	Wood Plastic and Composite Labr				
CE-FC-06M	Wood Plastic and Composite Matl				
CE-FC-07L	Thermal and Moisture Protn Labr				
CE-FC-07M	Thermal and Moisture Protn Matl				



# Adding Additional Lines

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

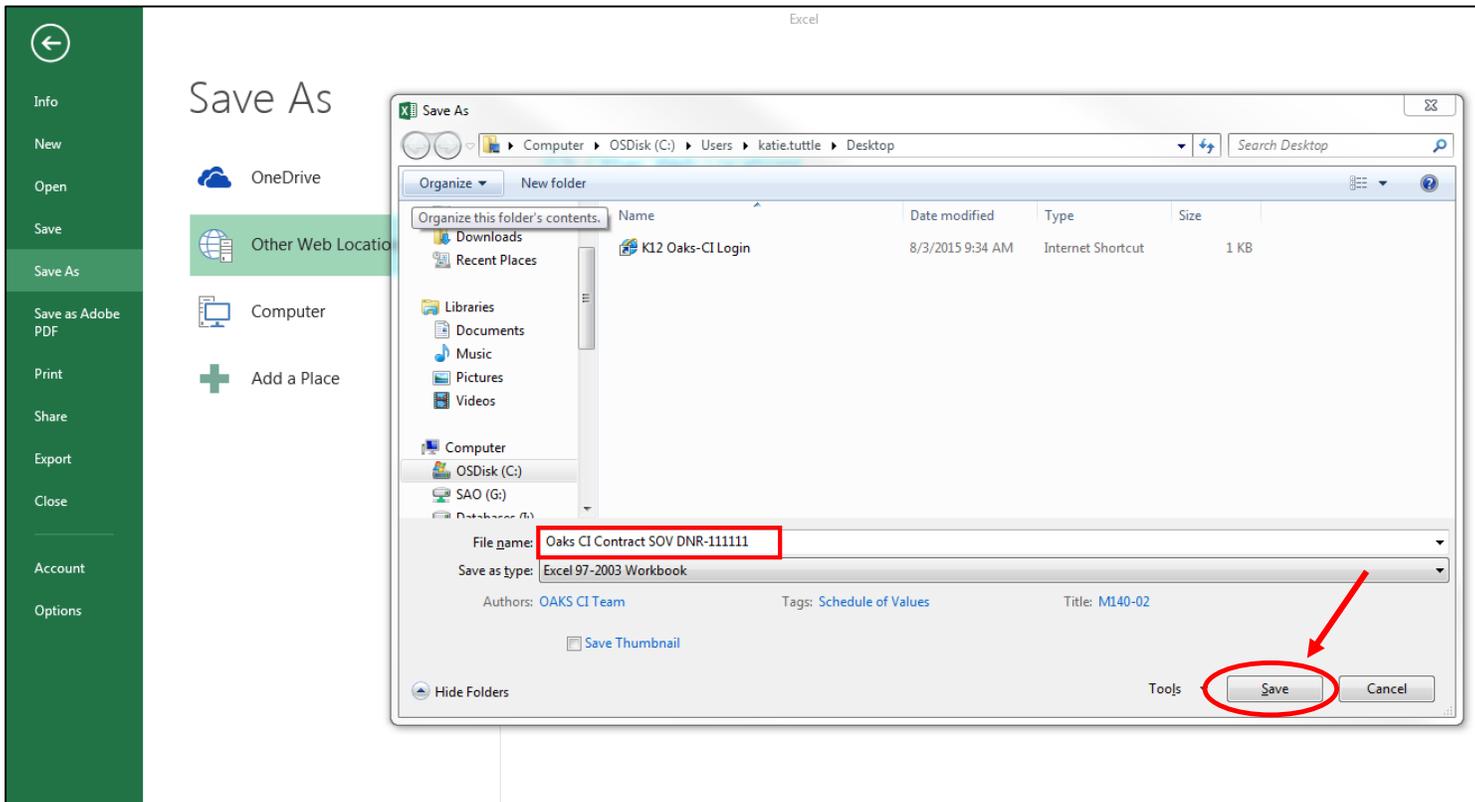
The screenshot shows the Microsoft Excel interface with a table of construction items. The table has columns for WBS Code, Code Description, Short Description, Amount (\$), and Subcontract. Row 18 is selected, and a context menu is open over it. The 'Insert Copied Cells' option is highlighted with a red circle and labeled 'd'. A blue circle labeled 'c' points to the right-click location on row 18.

WBS Code	Code Description	Short Description	Amount (\$)	Subcontract
			\$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 concret
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 Matl	\$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			\$34.00
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			



# Save and Email your Spreadsheet

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

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

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

**Contract Schedule of Values K12 SOV-008 is sent to you for Validation.**

From :	Matthew Weber
Sent For :	Validation

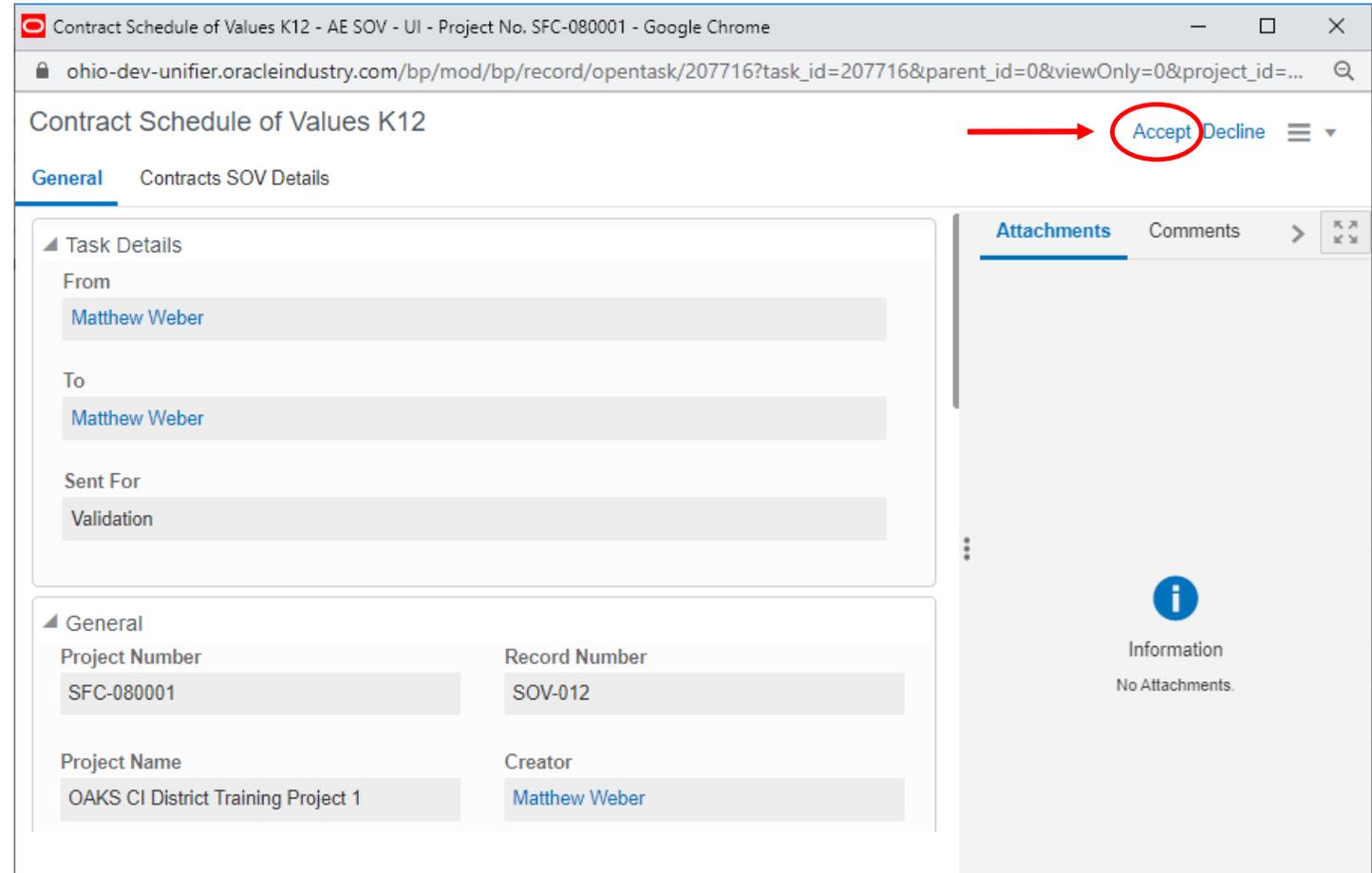
Source Name :	OAKS CI District Training Project 1
Record No :	Contract Schedule of Values K12 SOV-008
Title :	SOV CTL Engineering

[Unifier Login](#)



# Accept the Task

- ▶ Click Accept to begin reviewing the record



Contract Schedule of Values K12 - AE SOV - UI - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207716?task\_id=207716&parent\_id=0&viewOnly=0&project\_id=...

Contract Schedule of Values K12

Accept Decline

General Contracts SOV Details

Task Details

From  
Matthew Weber

To  
Matthew Weber

Sent For  
Validation

General

Project Number SFC-080001	Record Number SOV-012
Project Name OAKS CI District Training Project 1	Creator Matthew Weber

Attachments Comments

Information  
No Attachments.



# Review the Task

- a) Review the General section of the SOV
- b) Review the Contract Information section of the SOV
- c) Review Notes
- d) Review any Attachments

The screenshot displays a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207716/undefined?_uref=uuu714771907t3`. The page title is "Contract Schedule of Values K12" and the sub-section is "Contracts SOV Details". The page contains several sections:

- General Section (Annotation a):** Includes fields for Project Number (SFC-080001), Record Number (SOV-012), Project Name (OAKS CI District Training Project 1), Creator (Matthew Weber), Organization Name (OAKS CI District Training Project - 1), Creation Date (05/21/2020 04:17 AM (UTC-5)), Facility Name, Status (Pending), and Title (AE SOV - UI).
- Contract Information Section (Annotation b):** Includes fields for Contract No. (SFC-080001-02-01 Test), Contractor Name (Dynamix Engineering), Trade, Total Contract Amount (575,000.00), EDGE Certified Prime?, Line Item Total (\$) (575,000.00), Selection Method, and Difference (\$) (0.00).
- Notes Section (Annotation c):** A text area for entering notes.
- Attachments Section (Annotation d):** A sidebar on the right with an "Attachments" tab and an "Information" icon indicating "No Attachments".

Annotations are represented by blue circles with letters: 'a' is next to the General section, 'b' is next to the Contract Information section, 'c' is next to the Notes section, and 'd' is next to the Attachments section. Red arrows point from these circles to their respective sections in the screenshot.



# Review the Task

- e) Click the Contract SOV Details tab
- f) Review the line items

The screenshot shows a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207716/undefined/undefined?_uref=uuu71477190713`. The page title is "Contract Schedule of Values K12".

Annotation 'e' points to the "Contracts SOV Details" tab in the top navigation bar. Annotation 'f' points to the "Line Item Details" tab in the right-hand sidebar.

The main content area displays a table of line items:

No.	WBS Code	Code Name	Short Description	Amount (\$)	LFI F
006	AE-RE-DP	AE Document Printing	Document Printing	75,000.00	
005	AE-AS-SU	AE Site Surveying Serv...	Site Survey	100,000.00	
004	AE-AS-TI	AE Tests and Inspections	Tests and Inspections	100,000.00	
003	AE-BS-DD	AE Design Developme...	Design Development	100,000.00	
002	AE-BS-SD	AE Schematic Design ...	Schematic Design	100,000.00	
001	AE-BS-PD	AE Pre Design Services	Pre Design	100,000.00	

At the bottom of the table, it shows "Total: 6" and "Total Amount: 575,000.00".

The right-hand sidebar shows the "Line Item Details" form for the selected item (WBS Code: AE-RE-DP, Code Name: AE Document Printing, Amount: 75,000.00).



# Review the Task

- g) When the record is ready to move forward, click the **Send** button



# Review the Task

## h) Select the Workflow Action

- ▶ Choose **Validated** to move the record forward to the PM for Approval
- ▶ Choose **Return for Clarification** for update

## i) Click **Send**

The image displays two screenshots of a web application interface, specifically the 'Workflow Action Details' dialog box. The top screenshot shows the 'Workflow Actions' dropdown menu with 'Validated' and 'Return for Clarification' options highlighted by a red box. A red arrow points from a blue circle with the letter 'h' to the 'Validated' option. The bottom screenshot shows the 'Validated' option selected in the dropdown, with the 'Send For' field set to 'PM Approval'. A red arrow points from a blue circle with the letter 'i' to the 'Send' button at the bottom right of the dialog box.



# Requesting Payment

- ▶ Once the Contract SOV has been approved in OAKS CI, you will have the ability to create an Application for Payment



# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211

