



OFFICE OF THE UNIVERSITY ARCHITECT

GMP SUBCONTRACT DISTRIBUTION CHANGE ORDER IN OAKSCI

This is a workflow that is restricted to changes with no monetary or time impact and no scope of work changes. It is designed to only redistribute funds on the Schedule of Values. No actual change order has to be printed or signed as this is just a redistribution of funds.

Note: Construction Manager should have all of their needed Subcontractor/Suppliers approved under the Subcontractor/Supplier Declaration. **These must be approved before the change order can be started.**

Step One: Construction Manager will upload all documentation needed for the GMP Amendment Distribution.

- Accepted backup paperwork: Bid tab, Purchase Order with Subcontractor/Supplier, AIA Document, or some paperwork that shows the dollar amount and that it is agreed upon by both parties.
- This documentation should be uploaded to Document Manager – Construction – Change Orders. New folders may need to be set up to differentiate documentation for each Subcontract Distribution. They will all be listed under the Change Order folder.

Step Two: Construction Manager will go to Logs – Change Orders and then will choose GMP Subcontract Distribution.

- A title for this change order will be entered. It should be the a clear description of what the change order entails. (Example: Electrical Work)
- At Contract Reference, they will use the drop-down Select button to add the Construction Manager's contract.
- All lines with an asterisk will need to be filled in.

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Change Order

General

Organization: Kent State University Record Number:

Project Number: KSU-130001 Creator: KSU Student1

Project Name: Kent State University Training 2 Expiration Date:

Project Location: KSU Status:

Title: **GMP Distribution - List Trade** * Trade:

Contract Reference: **Select...** * Contractor Name:

Change Order Type: GMP Subcontract Distribution EDGE Certified Prime?:

Change Order No.: Fee Title:

Change Order Details

Description of Work: Explain what trade is being discussed. *

Justification: **To add subcontractors of (state work being performed) to Schedule of Values** *

Action Details

Line Item List

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

Hit the Select button and click on your contract.

Explain the work that is being done on this distribution

- A DETAILED Description and Justification must be entered. Basically explaining the trade that is being added to the Schedule of Values.
- Fill in the Contract Days Changed and also Total Amount. They should both be ZERO!
- Construction Manager will go to Line Item List and click on Add. A new box will appear.

Line Item List

Current View: All

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

No.	Reference	WBS Code	Code Name	Short Description	Amount

Click on Add, then click on Detail Line Item

Total Amount: \$ 0.00

Change Order Line Item:

General

Reference:

WBS Code: *

Code Name:

Short Description: *

Amount (\$): *

EDGE Certified Prime Contractor?:

Subcontractor/Supplier:

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

Click on the Reference line to enter the negative amount, and skip Reference and go straight to the WBS code for the positive amount. Be sure to put in a short description and the Subcontractor/Supplier name if used.

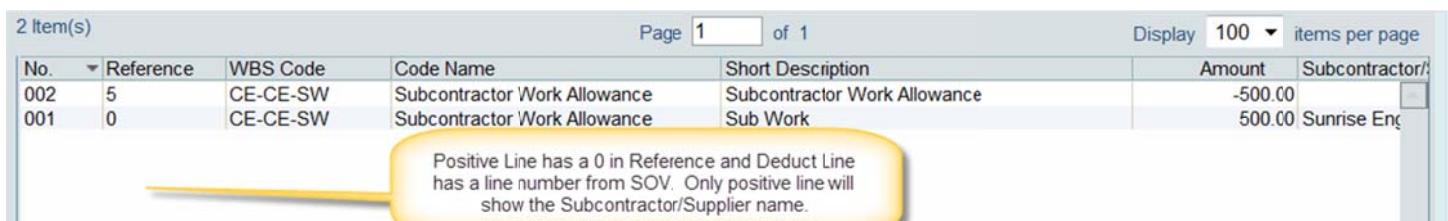
Attachments (0) [Linked Records \(0\)](#)

- If doing a **deduct** change line, pick **REFERENCE**, choose the line on your existing SOV that you are reducing (this will be the Subcontractor Work Allowance line, put in the dollar amount as negative. Add a short description. **While a change order with a deduct line is in process, the system will prevent you from preparing a pay request.**
- When adding the subcontractor's work lines, **SKIP** Reference and go straight to **WBS Code**. When the WBS Code screen comes up, click on the Collapse button to make it easier to view. Highlight the correct code, and hit Select. Add a short description and put in the amount.
- If the work is being performed by an EDGE subcontractor/supplier, select them onto the form.
- Click OK.
- Attach the documents that were uploaded to Document Manager.
- Workflow Actions is Submit and Send.

Note: Go to Page Five to see how to Import the SOV lines.

Step Three: Associate will Accept the task.

- Associate will check that the title, Description of Work and Justification of Work are clear and concise. If needed, they will add more information into any of these fields.
- Associate will number the change order (**see instructions for Change Order numbering.**)
- Associate will review that the proper WBS codes have been chosen by the Contractor.
- Associate will make sure that the Deduct line has a number under Reference and the Positive line has a 0 in the Reference section.



No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/
002	5	CE-CE-SW	Subcontractor Work Allowance	Subcontractor Work Allowance	-500.00	
001	0	CE-CE-SW	Subcontractor Work Allowance	Sub Work	500.00	Sunrise Eng

- Workflow Actions is Recommend Approval, then Send.

Step Four: Project Manager will Review.

- Project Manager will Accept the task.
- Project Manager will review the Title and Justification, and if needed, make changes.
- Workflow Actions will be Accept, then Send. It will go back to the Contractor.

Step Five: Contractor will **Accept** the Task.

- There is no need to print a change order as there is no monetary value to this change order as the monies are just being moved from one line to multiple lines.
- Workflow Actions is Sign Change Order, then Send. This goes to Project Coordinator (OUA Accounting).

Step Six: Project Coordinator will Accept the task.

- Checks Change Order details (SOV lines).
- Checks that the amount declared on the Subcontractor/Supplier Declaration matches the amounts listed on this distribution.
- Workflow Actions is Validated, then Send. Goes to Director.

Step Seven: Director will Accept the task.

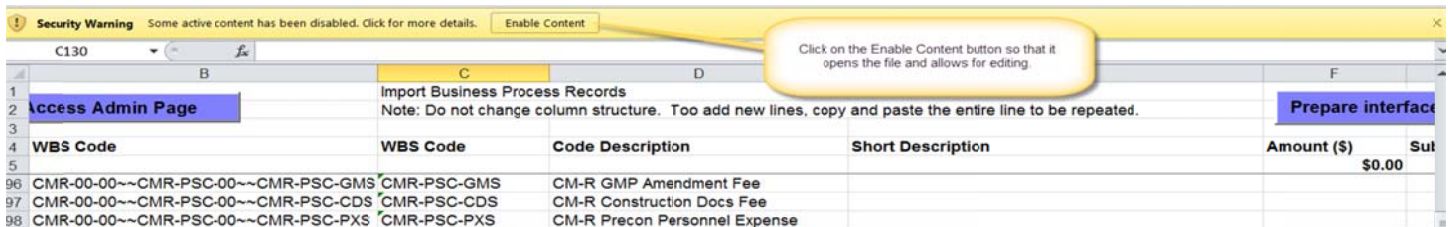
- Reviews the document – if he has questions, he will send back as a *Return for Clarification*.
- **Workflow Actions** is **Approve** then **Send**.

Note: The Construction Manager will now be able to bill for the items on this distribution.

To Add WBS Codes using the Import Feature:

Step One: Request the CMR WBS Code Template from the Office of the University Architect. Save this document in a location you will be able to find easily on your computer. My Documents is usually the best place.

- The document will be titled, OAKS CI Contract SOV Template for CM-R and D-B Preconstruction 20120719.



The screenshot shows an Excel spreadsheet with a yellow security warning bar at the top. The warning text reads: "Security Warning Some active content has been disabled. Click for more details. Enable Content". A callout box points to the "Enable Content" button with the text: "Click on the Enable Content button so that it opens the file and allows for editing". The spreadsheet content includes a header row with columns: "WBS Code", "WBS Code", "Code Description", "Short Description", "Amount (\$)", and "Subtotal". Below the header, there are three rows of data:

	WBS Code	WBS Code	Code Description	Short Description	Amount (\$)	Subtotal
96	CMR-00-00~~CMR-PSC-00~~CMR-PSC-GMS	CMR-PSC-GMS	CM-R GMP Amendment Fee			
97	CMR-00-00~~CMR-PSC-00~~CMR-PSC-CDS	CMR-PSC-CDS	CM-R Construction Docs Fee			
98	CMR-00-00~~CMR-PSC-00~~CMR-PSC-PXS	CMR-PSC-PXS	CM-R Precon Personnel Expense			

- Click the Enable Content button so that you can edit this document.

Step Two: Start entering in your Subcontractor/Supplier WBS Codes in this spreadsheet.

- Find the appropriate WBS Codes and add a short description (up to 50 characters). This description is very important, as whatever you insert here will show up on your pay request.
- **DO NOT ADD SUBCONTRACTOR OR SUPPLIER INFORMATION ON THIS SHEET.**
- Leave unused rows empty. **DO NOT DELETE LINES.**

Note: You may need to use the same WBS Code more than once. So, insert and copy the **ENTIRE LINE**.

Step Three: Click on the Prepare Interface File.

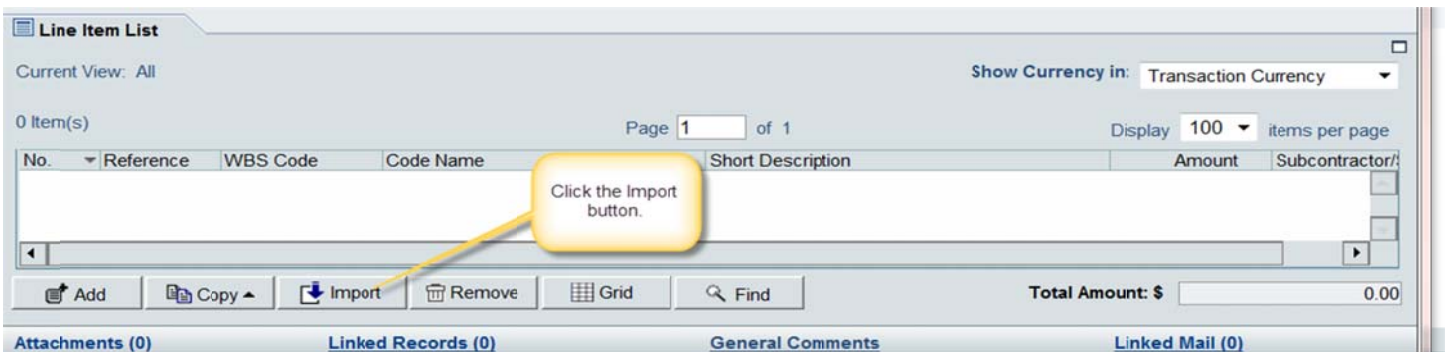
WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	Notes
CMR-PSC-GMS	CM-R GMP Amendment Fee		\$0.00		
CMR-PSC-CDS	CM-R Construction Docs Fee				
CMR-PSC-PXS	CM-R Precon Personnel Expense				
CMR-PSC-RES	CM-R Precon Reimbursable Expense				
CMR-CSC-00	CM-R Const Stage Corp Summary				
CMR-CSC-PXS	CM-R Const Personnel Expense				
CMR-CSC-CFS	CM-R Construction Stage Fee				

- The screen will flicker as the interface file is created. You should get a message saying the process is complete. Click Ok.
- A new file will be created titled OAKS CI Contract SOV Template for CM-R and D-B Preconstruction 20120719.CSV

Note: This file will automatically save to the location you have the original Excel spreadsheet.

Step Four: Go into OAKSCI. Click on your project.

- Go to Logs – Change Order.
- Start New.
- Click on the Line Item List words to enlarge this section.



- Click on the Import button. A box will appear like you see when you upload a document.
- Find the CSV Spreadsheet, highlight it and click OK. All of your WBS Codes will appear exactly as you entered them in the Excel spreadsheet.
- Click on specific lines and add the Subcontractor/Supplier information.
- Click on Add – Detail Line Item. Click on **Reference** and find the line you will be **DEDUCTING**. Hit Select, and enter the amount (**NEGATIVE**) that you will be deducting.
- The Total Amount when complete, should be ZERO.

GO BACK TO PAGE FOUR TO COMPLETE THE PROCESS.