



Proposal Request

Agency/Higher-Ed

DocuSign Enabled Record

- ▶ The Contract Modification Record workflows now utilize DocuSign, which enables electronic signature of change orders.
 - ▶ GMP Amendment
 - ▶ **Proposal Request**
 - ▶ Request for Change Order
 - ▶ Change Directive
- ▶ Users who are sent a Contract Modification 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
- ▶ For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website.

Purpose and Process

- ▶ Used when the revision to the Contract Schedule of Values will not adversely impact the construction schedule or the finished product if not implemented.
- ▶ The A/E initiates the proposal request and the Contractor provides pricing and time impact.
- ▶ Proposal Requests are initiated in OAKS CI as Contract Modifications.

- ▶ **Workflow:**

Created by: A/E → Sent to: Contractor Proposal Creation → Sent to: A/E Review → Sent to: Proposal Update (if necessary) → Sent to: PM Review → Sent to: Project Coordinator for Change Order Validation → Sent to: Vendor signature via DocuSign

Proposal Request Creation

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

The screenshot displays the Oracle Primavera Unifier (Development) interface. The breadcrumb navigation shows the path: Agency > OAKS CI Training > OAKS CI Training 4. The left sidebar contains a navigation menu with the following items: OAKS CI Training 4 - Home, XAM Patients, Alerts, Tasks, Notifications, Drafts, uMail, Information, Cost Manager, Data Manager, Document Manager, Logs (circled in red), 72 Hour Notice, Action Items, Advertisements, Budget - Initial, Budget - Revisions, Change Order (highlighted in red), Closeout - Contractor, Closeout - Profession..., Contract, and Contract Schedule of V. A red arrow points from the 'Change Order' item in the sidebar to the right-hand pane. The right-hand pane shows a 'Change Order' list with a 'Create' button and a dropdown menu. The dropdown menu is open, showing a list of workflows, with 'OFCC Proposal Request v3.0' selected and highlighted in blue. The list of workflows includes: Agency Change Directive, Agency Proposal Request, Agency Request for CO, Contingency Consumption, Expedited Deduct Change Order, GMP Amendment v3.0, GMP Subcontract Distribution, OFCC Change Directive 3.0, OFCC GMP Amendment, OFCC Proposal Request v3.0, Request for Change Order v3.0, SAO Field Work Order, V2 - OFCC Change Directive, Zero Dollar Change Order, and v3.0 GMP Subcontractor Distribution. The table below the dropdown menu shows a list of Change Orders with columns for CO No, Description, and Requester. The total number of Change Orders is 22.

CO No	Description	Requester
002	Agency Change Directive	
001	Agency Proposal Request	
12345	Agency Request for CO	
	Contingency Consumption	
	Expedited Deduct Change Order	
	GMP Amendment v3.0	
	GMP Subcontract Distribution	
1	OFCC Change Directive 3.0	
2	OFCC GMP Amendment	
PR-00	OFCC Proposal Request v3.0	
1	Request for Change Order v3.0	
PR-00	SAO Field Work Order	
PR-00	V2 - OFCC Change Directive	
001	Zero Dollar Change Order	
00009	v3.0 GMP Subcontractor Distribution	

Complete General Block

- ▶ All fields marked with a red * are required
- ▶ Click Select to choose the Contract Reference
- ▶ Fill out any additional information

Create New Change Order - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3107&module_name=uco&project_id=10

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Change Order

General


Organization: Department of Administrative Services Record Number:

Project Number: OCI-090004 Creator: [Katie Tuttle](#)

Project Name: OAKS CI Training 4 Creation Date:

Project Location: 4200 Surface Road Status:

Title: Sample Proposal Request * Trade: HVAC

Contract Reference: dps-090004-01-01 *  Contractor Name: R. W. Setterlin Building Company

Change Order Type: Proposal Request EDGE Certified Prime?: Yes

Change Order No.: 005 * Fee Title:

Action Details

Line Item List

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

Change Order Details

- ▶ Scroll down to the Change Order Details section
- ▶ Fill out the Description of Work and Justification fields

Create New Change Order - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3107&module_name=uco&project_id=10

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Add Attachment Discussion SOV Close Window

General **Change Order**

Change Order Details

Description of Work: This is the work to be completed *

Justification: This is the justification *

Change Order Cost and Time Impact

Current Completion Date: Total Amount (\$): \$0.00

Action Details

Line Item List

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

Select Recipients

- ▶ Click the “To” button to choose users or a group to receive the task

The screenshot displays a web application interface for creating a change order. The main window is titled "Create New Change Order - Project No. OCI-090004 - Mozilla Firefox". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3107&module_name=uco&project_id=10. The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with various workflow actions like Submit, Send, Save, Spelling, Add Attachment, Discussion, SOV, and Close Window.

The main content area is titled "Change Order" and contains a "Change Order Details" section with a "Description of Work" field. Below this is the "Action Details" section, which includes a "Submit" button and a "To..." button. A red arrow points from the "To..." button to a "User/Group Picker" dialog box that is open over the main window.

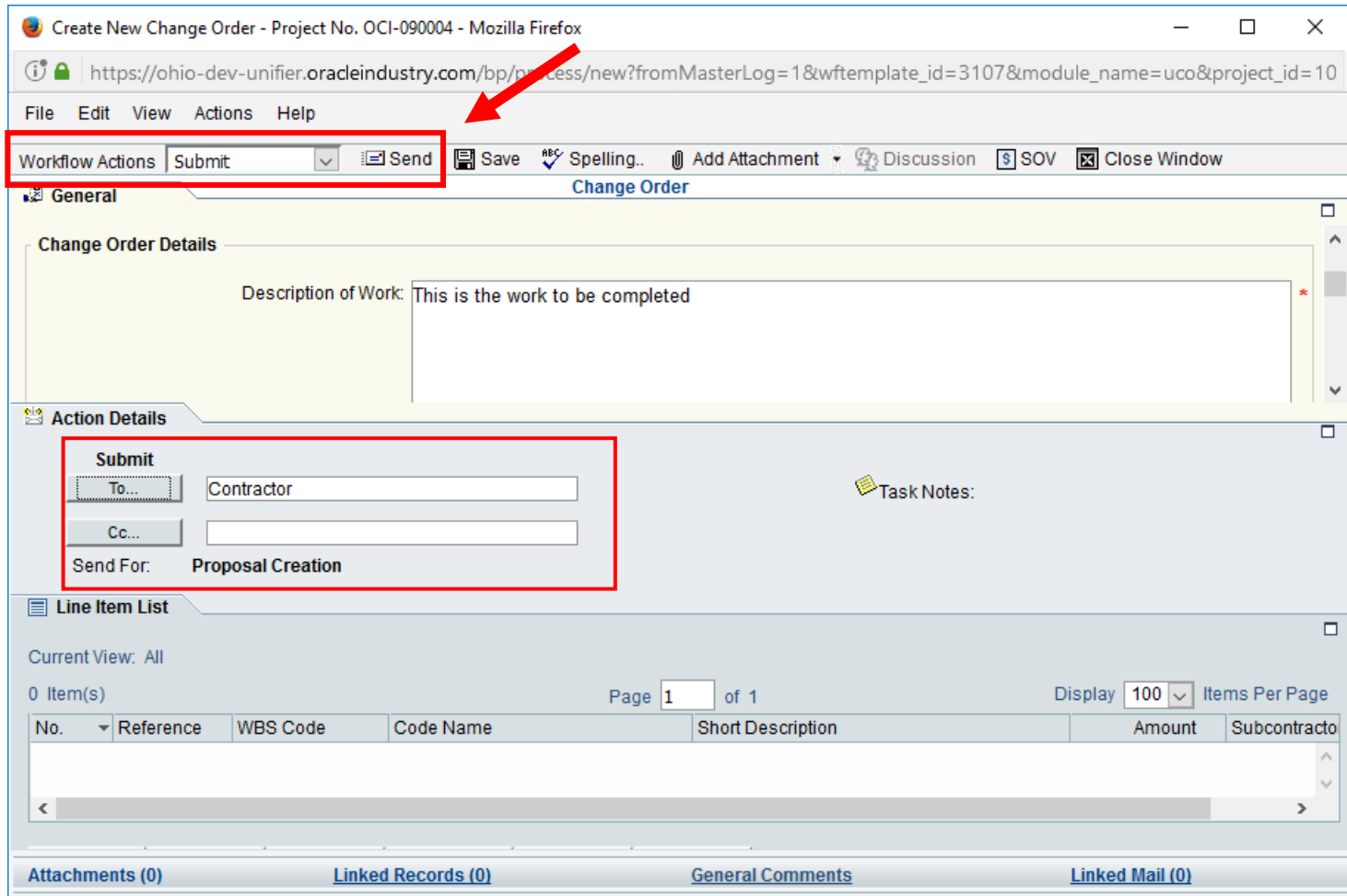
The "User/Group Picker" dialog box is titled "User/Group Picker - Mozilla Firefox" and has the URL https://ohio-dev-unifier.oracleindustry.com/bp/share/project/picker_usergroup?UserGroupPickerId. It features a search bar with "Find" and "List Names from: OAKS CI Trainina 4" and a "Show By: Users/Groups" dropdown. Below the search bar is a table of users and groups:

Name	Company
Archana Atrey	State of Ohio
Barbara Taylor	State of Ohio
Bill Schwertfager	State of Ohio
CMR or DB	
Contractor	
Katie Tuttle	State of Ohio
Moenique Morris	State of Ohio
Oaks Instructor	State of Ohio
Purna Irukulapati	State of Ohio

At the bottom of the dialog box, there are buttons for "Add", "View Profile", "Members", "OK", "Remove", and "Cancel".

Send the Record

- ▶ Verify Workflow Action
- ▶ Click Send



Browser Title: Create New Change Order - Project No. OCI-090004 - Mozilla Firefox

URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3107&module_name=uco&project_id=10

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Change Order

Change Order Details

Description of Work: This is the work to be completed

Action Details

Submit

To... Contractor

Cc...

Send For: Proposal Creation

Task Notes:

Line Item List

Current View: All

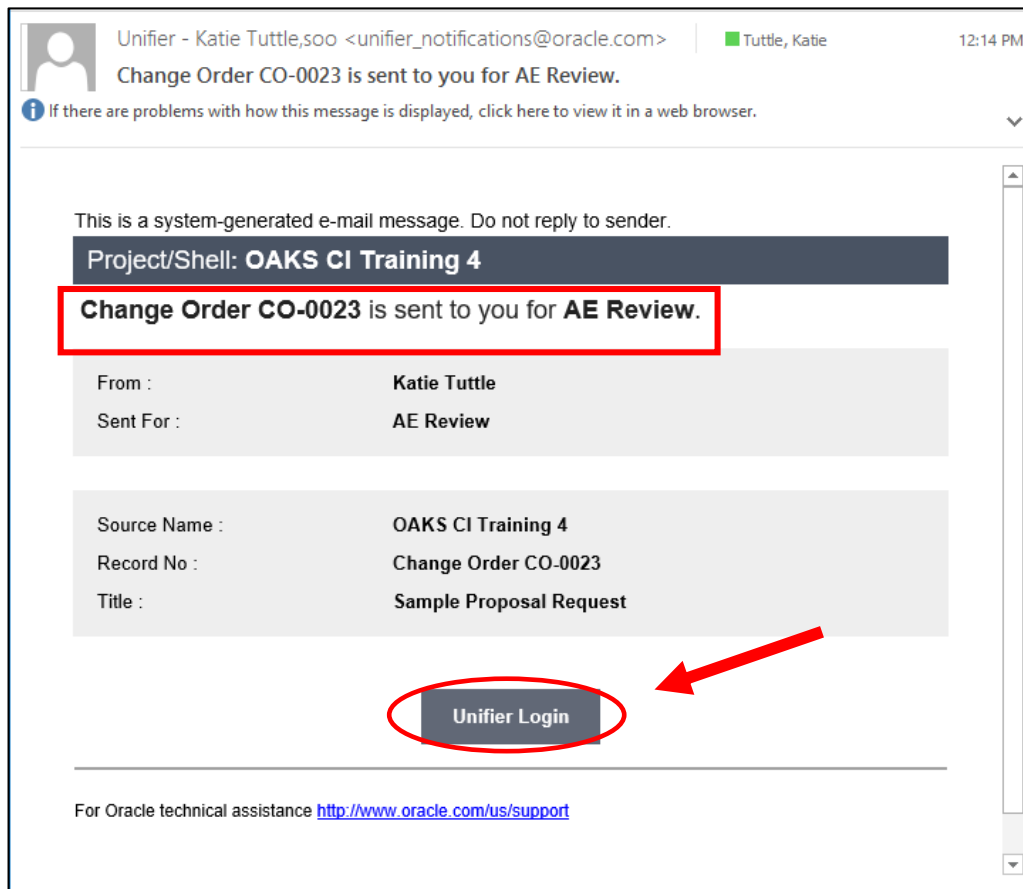
0 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor
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Attachments (0) Linked Records (0) General Comments Linked Mail (0)

A/E Review

- ▶ Once the Contractor creates the Proposal, it will come back to the A/E for Review
- ▶ The A/E will receive an email notification that they have a Task to complete in OAKS CI
- ▶ Click on the “Unifier Login” link to access the Task



A/E Review

- ▶ Click Accept Task to begin work on the record

Change Order - Sample Proposal Request - Project No. OCI-090004 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187687&parent_id=0&viewOnly=0&project_id=102

File Edit View Actions Help

Accept Task Decline Task SOV Review Close Window Change Order

General

General

Organization: Department of Administrative Services Record Number: CO-0023
Project Number: OCI-090004 Creator: Katie Tuttle
Project Name: OAKS CI Training 4 Creation Date: 06/27/2017 08:22 AM (UTC-8)
Project Location: 4200 Surface Road Status: Pending

Task Details

From: [Katie Tuttle](#) Task Due Date:
To: [Associate Archana Atrey](#) Task Status: [Not Started](#)
Cc:
Sent For: AE Review

Task Notes (0)
[Workflow Progress](#)

Line Item List

Current View: All Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subco
002	0	CE-FC-02M	Existing Conditions Matl	Extra material	\$10,000.00	
001	1	LE-LE-CS	Legal Consulting Expense	legal	-\$5,000.00	

Grid Find Show Filtered Total Amount Total Amount: \$5,000.00

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

A/E Review

- Review the General tab and Line Item list tab

Change Order - Sample Proposal Request - Project No. OCI-090004 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187687&model=uco&project_id=1021&initiateBP=&bulkauto

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

General

Change Order

General

Organization: Department of Administrative Services Record Number: CO-0023

Project Number: OCI-090004 Creator: Katie Tuttle

Project Name: OAKS CI Training 4 Creation Date: 06/27/2017 08:22 AM (UTC-8)

Project Location: 4200 Surface Road Status: Pending

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:
Workflow Progress

Line Item List

Current View: All Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/Sup
002	0	CE-FC-02M	Existing Conditions Matl	Extra material	\$10,000.00	
001	1	LE-LE-CS	Legal Consulting Expense	legal	-\$5,000.00	

Add Copy Import Remove Grid Find Show Filtered Total Amount Total Amount: \$5,000.00

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

Send the Record

- ▶ Once the review is complete, send the record to the PM for review or return to the Contractor for changes if necessary
- ▶ Select Workflow Action: Accept or Return for Clarification
- ▶ Click Send

Change Order - Sample Proposal Request - Project No. OCI-090004 - Google Chrome

Secure | <https://ohio-dev-unifier.oracleindustry.com/...>

File Edit View Actions Help

Workflow Actions: Accept (selected) | Send | Save | Spelling... | Add Attachment | Discussion | SOV | Review | Close Window

General: Accept (selected), Return for Clarification, Reject

Organization: Department of Administrative Services | Record Number: CO-0023

Project Number: OCI-090004 | Creator: Katie Tuttle

Project Name: OAKS CI Training 4 | Creation Date: 06/27/2017 08:22 AM (UTC-8)

Project Location: 4200 Surface Road | Status: Pending

Action Details

Accept (Click here to view latest content)

To...: Archana Atrey, Barbara Taylor, Bill Schwertfage

Cc...: [Empty]

Send For: PM Review

Task Notes:

Workflow Progress

Line Item List

Current View: All | Show Currency in: Transaction Currency

2 Item(s) | Page 1 of 1 | Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontractor/Sup
002	0	CE-FC-02M	Existing Conditions Matl	Extra material	\$10,000.00	
001	1	LE-LE-CS	Legal Consulting Expense	legal	-\$5,000.00	

Add | Copy | Import | Remove | Grid | Find | Show Filtered Total Amount | Total Amount: \$5,000.00

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

Questions?

Please contact OAKS CI Support Desk:

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