



# 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](https://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

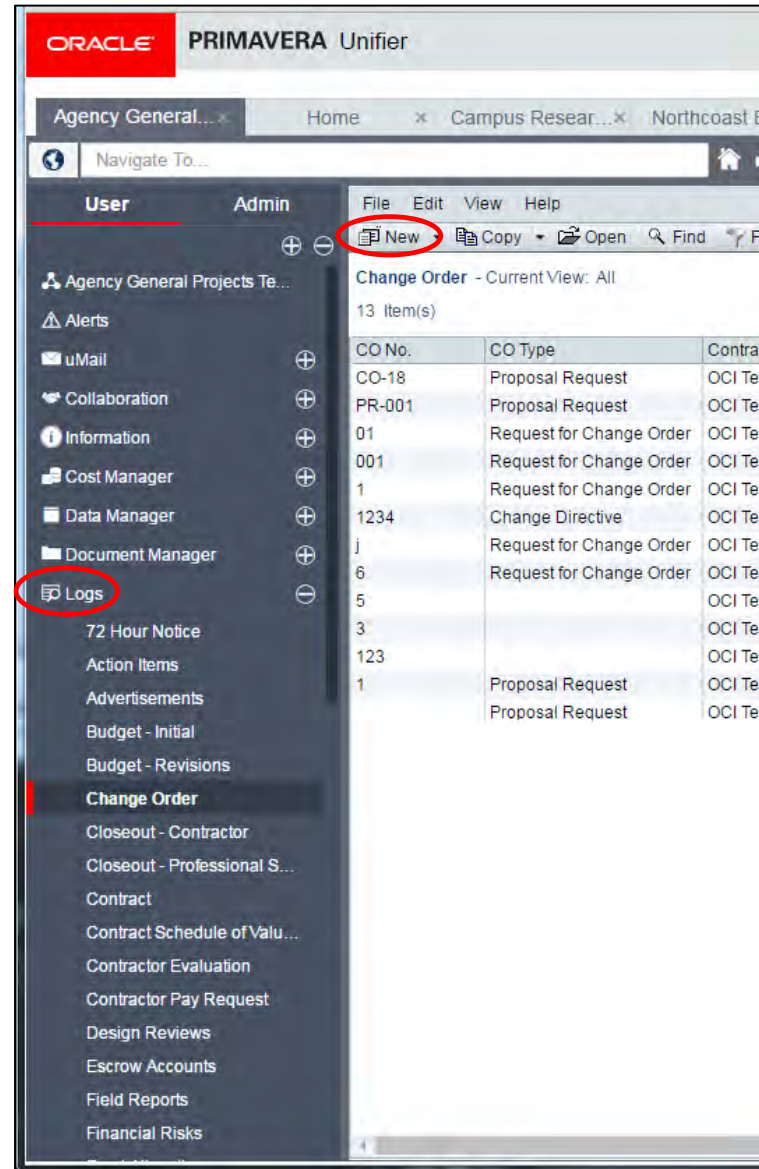
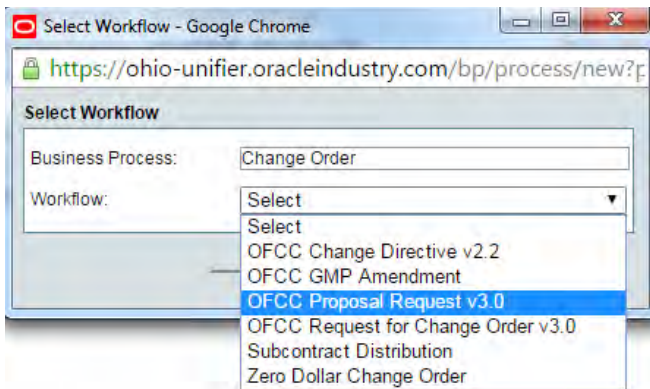
# Proposal Request Creation

▶ In Oaks CI navigate to:

▶ Logs -> Change Order

▶ Click New

▶ Select Workflow



# Complete General Block

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

Organization: Department of Administrative Services

Project Number: OCI-080001

Project Name: Agency General Projects Test

Project Location: OAKS CI Administration

Title: Test Proposal Request \*

Contract Reference: OCI-090002-002 Select.. \*

Change Order Type: Proposal Request

Change Order No.: CO-18 \*

Record Number:

Creator: Katie Tuttle

Creation Date:

Status:

Trade: General Trades

Vendor Name: OCI Test General

EDGE Certified Prime?: No

Fee Title: SAO Standard Fee 1

Change Order Details

Description of Work: Please propose the change \*

Justification: This is my justification \*

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

The screenshot shows a web browser window titled "Create New Change Order - Project No. OCI-080001 - Google Chrome". The URL is [https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=106007&module\\_name=uco&csvimport=false&...](https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=106007&module_name=uco&csvimport=false&...). The browser menu includes File, Edit, View, Actions, and Help. The page title is "Change Order".

The form is divided into several sections:

- General:** Change Order type: Proposal Request; Change Order No.: CO-18; Fee Title: SAO Standard Fee 1.
- Change Order Details (highlighted with a red box):**
  - Description of Work: Please propose the change
  - Justification: This is my justification
- Change Order Cost and Time Impact:**

|                                |   |                       |        |
|--------------------------------|---|-----------------------|--------|
| Current Completion Date:       |   | Total Amount (\$):    | \$0.00 |
| Contract Days Changed This CO: | 0 | Line Item Total (\$): | \$0.00 |
| Revised Completion Date:       |   | Difference (\$):      | \$0.00 |
- Basis of Change Order:**
- Action Details:**
- Line Item List:**

At the bottom, there are links for Attachments (0), Linked Records (0), General Comments, and Linked Mail (0).

# Send the Record

- ▶ Send the record to the Contractor for Proposal Creation
- ▶ Select Workflow Action: Submit
- ▶ Click Send

The screenshot shows the Oracle Project System interface for creating a new change order. The browser title is "Create New Change Order - Project No. OCI-080001 - Google Chrome". The URL is [https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=106007&module\\_name=ucb&svimport=false&...](https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=106007&module_name=ucb&svimport=false&...). The form is titled "Change Order" and includes the following sections:

- General:** Change Order type: Proposal Request; Change Order No.: CO-18; Fee Title: SAO Standard Fee 1.
- Change Order Details:** Description of Work: Please propose the change.
- Action Details:** Submit button; To...: Contractor; Cc...: ; Send For: Proposal Creation.
- Line Item List:** Current View: All; Page 1 of 1; Display 100 Items Per Page.

The "Send" button in the top toolbar is circled in red. The "Workflow Actions" dropdown menu is open, showing "Submit" selected. The "Submit" button in the "Action Details" section is also circled in red. A red arrow points to the "Submit" option in the dropdown menu.

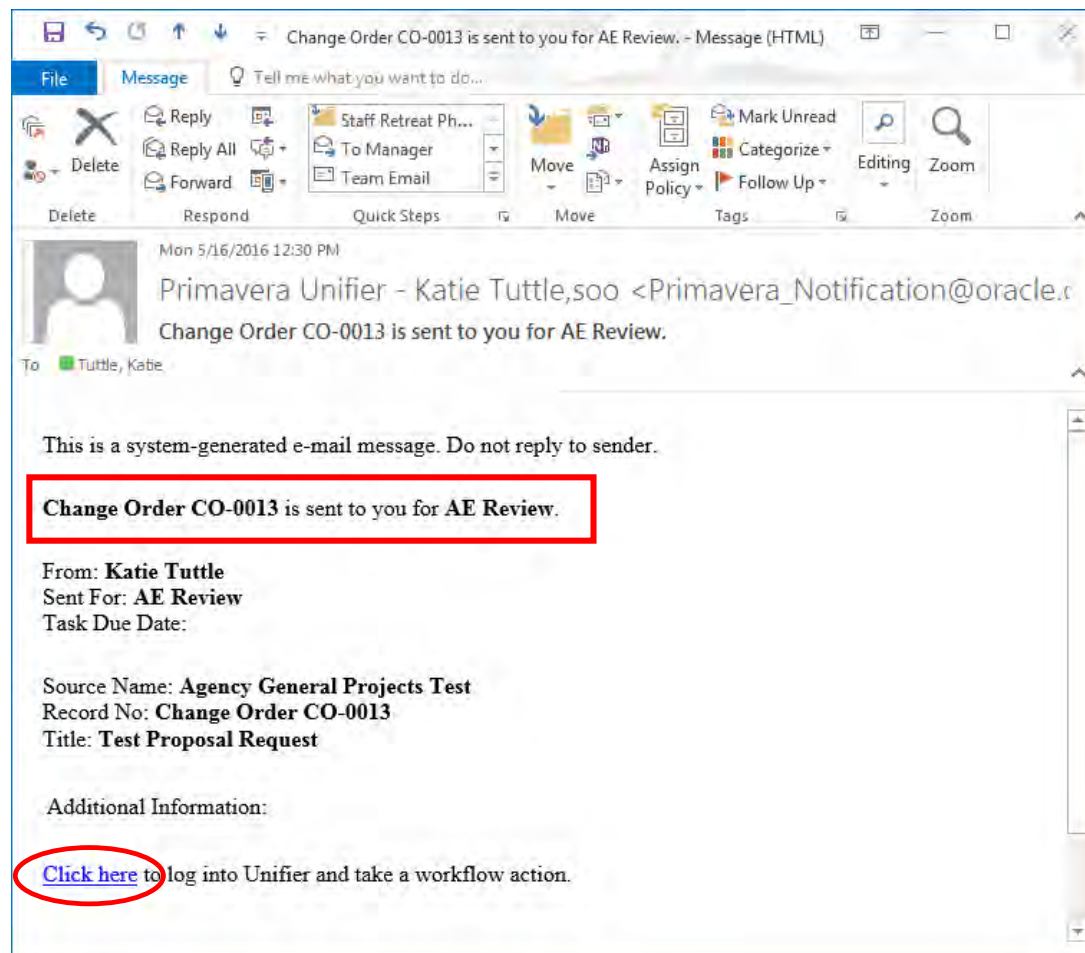
| No. | Reference | WBS Code | Code Name | Short Description | Amount | Subcontr |
|-----|-----------|----------|-----------|-------------------|--------|----------|
| 1   |           |          |           |                   |        |          |

Total Amount: \$0.00

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 link to access the Task





# A/E Review

- ▶ Click Accept Task to begin work on the record

Change Order - Test Proposal Request - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\_id=1049638&parent\_id=0&viewOnly=0&project\_id=.

File Edit View Actions Help

**Accept Task** Decline Task SOV Close Window

**Change Order**

**General**

Organization: Department of Administrative Services Record Number: CO-0013  
Project Number: OCI-080001 Creator: Katie Tuttle  
Project Name: Agency General Projects Test Creation Date: 05/16/2016 11:53 AM (UTC-5)  
Project Location: OAKS CI Administration Status: Pending

**Task Details**

From: Katie Tuttle; Task Due Date: Task Notes (0)  
To: Associate:Katie Tuttle; More.. Task Status: Not Started  
Cc:  
Sent For: AE Review

**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     | Subcontr |
|-----|-----------|-----------|---------------|-------------------|------------|----------|
| 002 | 0         | CE-FC-03L | Concrete Labr | Concrete Labor    | \$2,500.00 | Bobs     |
| 001 | 2         | CE-FC-03L | Concrete Labr | labor -concrete   | \$2,500.00 | Bobs     |

Grid Find Total Amount: \$5,000.00

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

# A/E Review

- ▶ Review the upper and lower forms of the record
- ▶ Click the General or Line Item list tab to expand

Change Order - Test Proposal Request - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\_id=1049638&model=uco&project\_id=1003&initiateB

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

**General** Change Order

**General**

Organization: Department of Administrative Services Record Number: CO-0013  
Project Number: OCI-080001 Creator: Katie Tuttle  
Project Name: Agency General Projects Test Creation Date: 05/16/2016 11:53 AM (UTC-5)  
Project Location: OAKS CI Administration Status: Pending  
Title: Test Proposal Request Trade: General Trades

**Action Details**

(Click here to view latest content)

To...  
Cc...  
Send For:

**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     | Subcontr |
|-----|-----------|-----------|---------------|-------------------|------------|----------|
| 002 | 0         | CE-FC-03L | Concrete Labr | Concrete Labor    | \$2,500.00 | Bobs     |
| 001 | 2         | CE-FC-03L | Concrete Labr | labor -concrete   | \$2,500.00 | Bobs     |

Add Copy Import Remove Grid Find 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 - Test Proposal Request - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\_id=1049638&mod...&project\_id=10038&initiated...

File Edit View Actions Help

Send Save Spelling... Add Attachment Discussion SOV Close Window

Workflow Actions: Accept, Accept, Return for Clarification, Reject

General

Organization: Department of Administrative Services Record Number: CO-0013

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: Agency General Projects Test Creation Date: 05/16/2016 11:53 AM (UTC-5)

Project Location: OAKS CI Administration Status: Pending

Title: Test Proposal Request Trade: General Trades

Action Details

Accept (Click here to view latest content)

To... Katie Tuttle, Moenique Morris, Rita Nichols, Sara...

Cc...

Send For: PM Review

Task Notes:

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     | Subcontr |
|-----|-----------|-----------|---------------|-------------------|------------|----------|
| 002 | 0         | CE-FC-03L | Concrete Labr | Concrete Labor    | \$2,500.00 | Bobs     |
| 001 | 2         | CE-FC-03L | Concrete Labr | labor-concrete    | \$2,500.00 | Bobs     |

Total Amount: \$5,000.00

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

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211