OAKS
Capital Improvements

Cost Proposal Creation

K-12 Cloud

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

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 or via this link: http://ofcc.ohio.gov/Resources/OAKSCI/K-12Training.aspx

*Note on Deduct Change Orders

- If you are taking money away (deducting) from the contract, this proposal will **LOCK** the Contract Schedule of Values (SOV) and no Applications for Payment can be created until this Change Order is Approved or Withdrawn
  - **A new workflow- The Expedited Deduct Change Order can be activated for your project and can help you avoid locking the SOV. Please contact your OFCC project manager to enable this.**

- Also, if you have an Application for Payment in your drafts it can be corrupted when a deduct Change Order is created.
  - The fix for this is to create your Application for Payment and send it forward to the A/E, then have the A/E return it to you for clarification. This changes the status of your Application for Payment record and keeps the Change Order from corrupting it.

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.

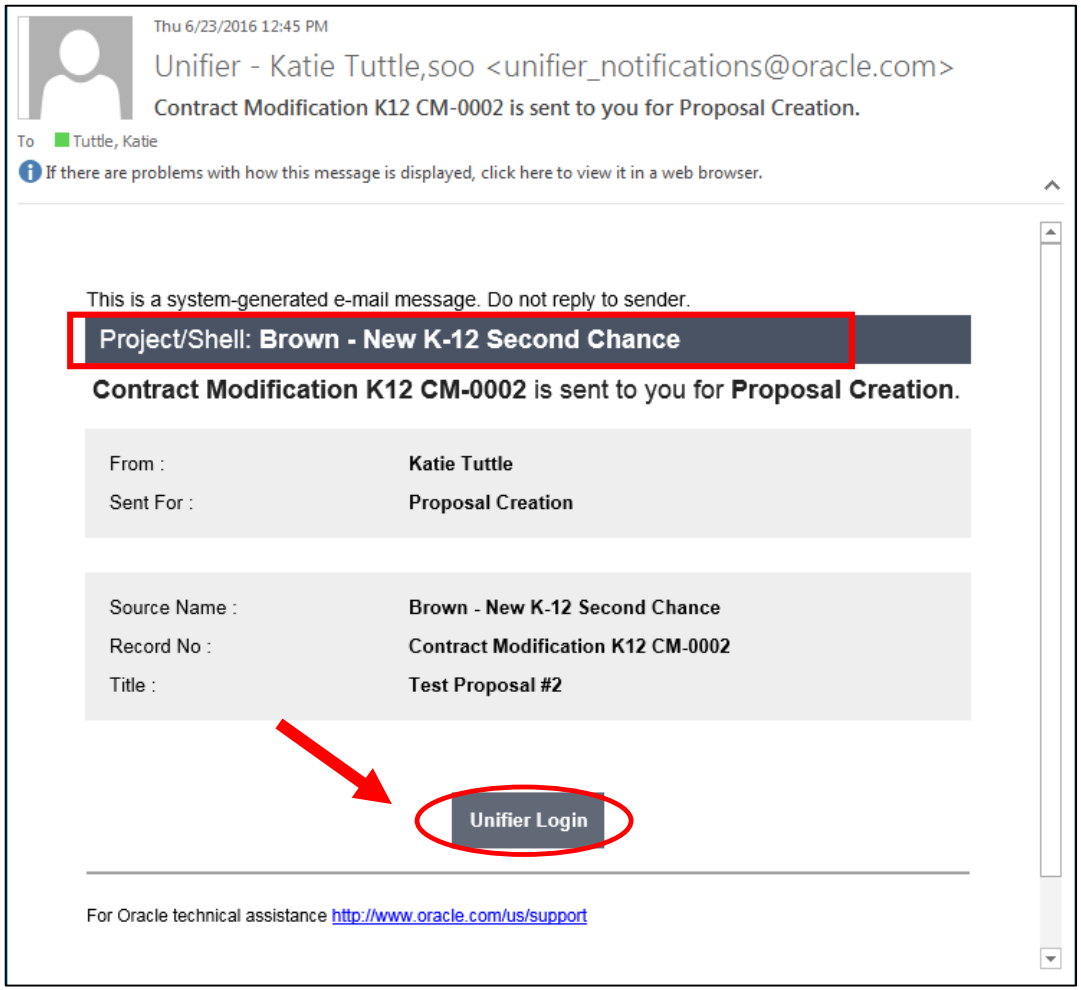
- Proposal Requests are labeled in OAKS CI as Contract Modifications.

- **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: Vendor signature via DocuSign

Create Cost Proposal

- The Contractor will receive an email notification from OAKS CI that they have a Contract Modification Task for Proposal Creation
- Click the Link to access your Task


Thu 6/23/2016 12:45 PM

Unifier - Katie Tuttle,soo <unifier_notifications@oracle.com>

Contract Modification K12 CM-0002 is sent to you for Proposal Creation.

To Tuttle, Katie

If there are problems with how this message is displayed, click here to view it in a web browser.

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

Project/Shell: **Brown - New K-12 Second Chance**

Contract Modification K12 CM-0002 is sent to you for **Proposal Creation**.

From :	**Katie Tuttle**
Sent For :	**Proposal Creation**

Source Name :	**Brown - New K-12 Second Chance**
Record No :	**Contract Modification K12 CM-0002**
Title :	**Test Proposal #2**

Unifier Login

For Oracle technical assistance http://www.oracle.com/us/support

Cost Proposal

- Note information in Task Details
- Click Accept Task to begin work on the record

Contract Modification K12 - Test Proposal Request - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=159386&parent_id=0&viewOnly=0&project_

File Edit View Actions Help

Accept Task | Decline Task | SOV | Close Window

General | Contract Modification K12

General

Project Number:	SFC-080001.01	Record Number:	CM-0004
Project Name:	Oak Hills Local Building Project	Creator:	Katie Tuttle
Organization Name:		Creation Date:	05/10/2016 05:40 AM (UTC-8)
Facility Name:		Status:	Pending

Task Details

From: Katie Tuttle; Task Due Date: Task Notes (0)

To: Contractor:Katie Tuttle; Task Status: Not Started

Cc:

Sent For: **Proposal Creation**

Line Item List

Current View: All | Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor

Grid | Find | Total Amount: $0.00

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

Cost and Time Impact

- Click the General Tab to expand
- Scroll down to the Change Order Cost and Time Impact section
- Enter Contract Days Changed and/or Total Dollar Amount

Contract Modification K12 - Test Proposal Request - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=159386&model=ucmk&project_id=1086&in

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification K12

Change Order Cost and Time Impact

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:		Total Amount ($):	$5,000.00 *
Contract Days Changed This CO:	45	Line Item Total ($):	$0.00
Revised Completion Date:		Difference ($):	$5,000.00

Basis of Change Order

Change Order Basis: Other Description:

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path: Contracts - Modifications/CM at Risk/ Test Proposal Request

Action Details

Line Item List

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

Add Line Items

- Enter the Cost Proposal Amounts by adding line items to the record
- Click Line Item List tab

Contract Modification K12 - Test Proposal Request - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=159386&model=ucmk&project_id=1086&in

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification K12

Change Order Cost and Time Impact

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:		Total Amount ($):	$5,000.00 *
Contract Days Changed This CO:	45	Line Item Total ($):	$0.00
Revised Completion Date:		Difference ($):	$5,000.00

Basis of Change Order

Change Order Basis: Other Description:

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path: Contracts - Modifications/CM at Risk/ Test Proposal Request

Action Details

Line Item List

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

Add Line Items

- Click Add

Contract Modification K12 - Test Proposal Request - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=159386&model=ucmk&project_id=1086&in

File Edit View Actions Help Workflow Actions Submit

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General

Contract Modification K12

Action Details

Line Item List

Current View: All Show Currency in: Transaction Currency

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

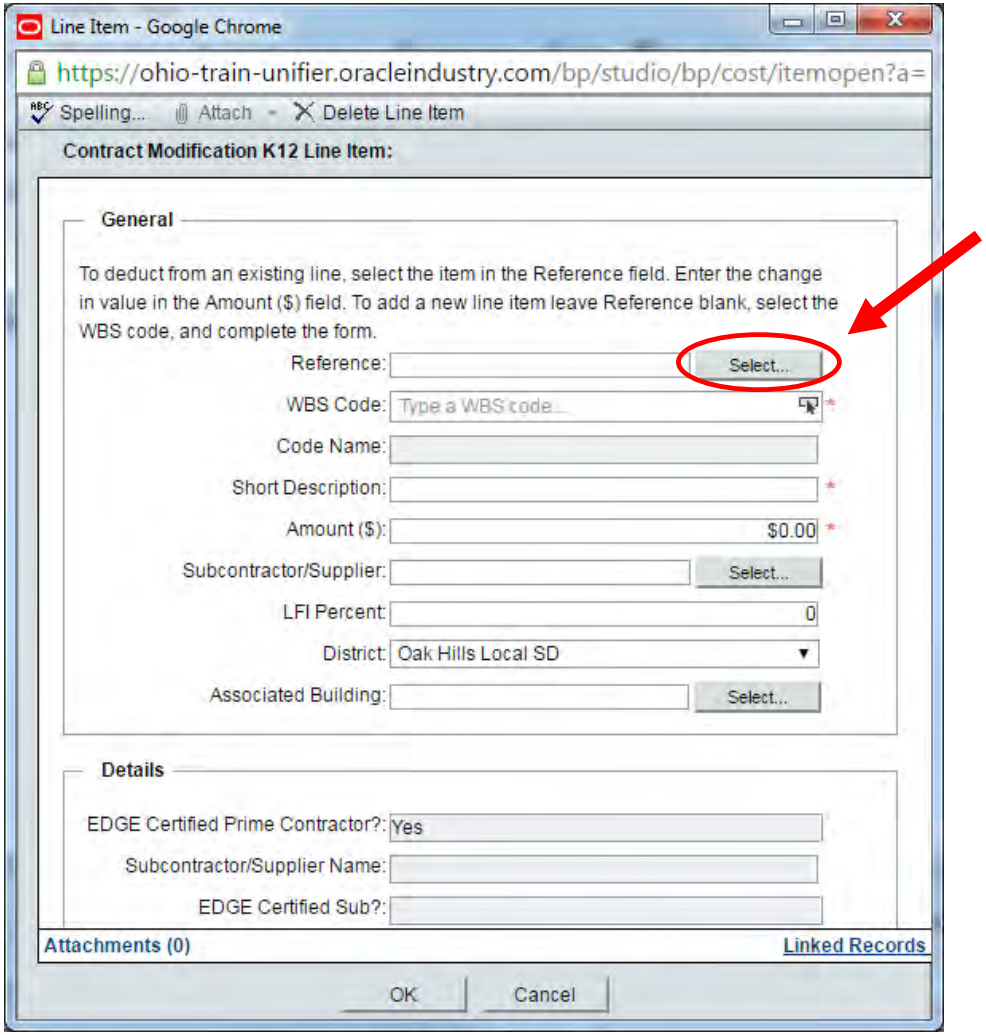
No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/

Add Copy Import Remove Grid Find Total Amount: $0.00

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

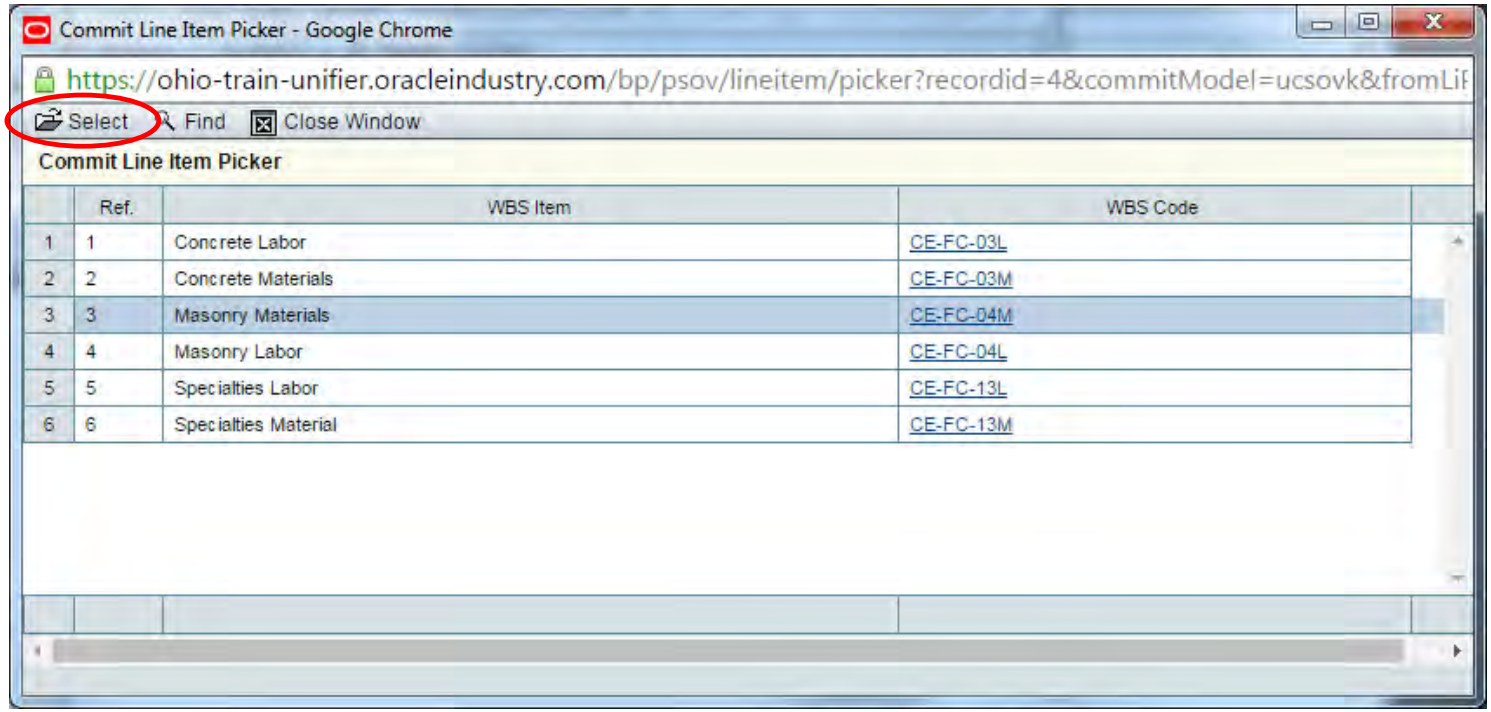
Change a Current Line on the SOV

- To change a current line on the Contract Schedule of Values (SOV), click the Select button next to Reference



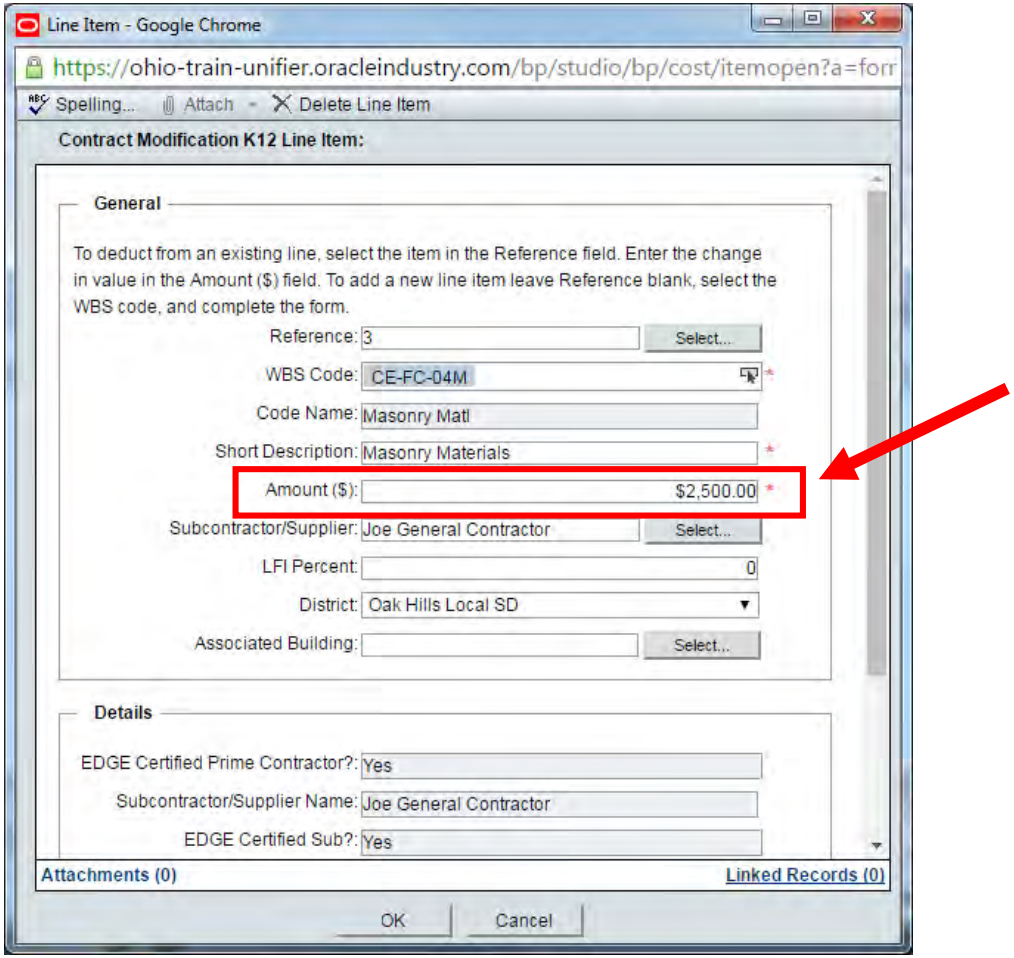
Change a Current Line on the SOV

- Highlight the SOV line you wish to modify
- Click Select



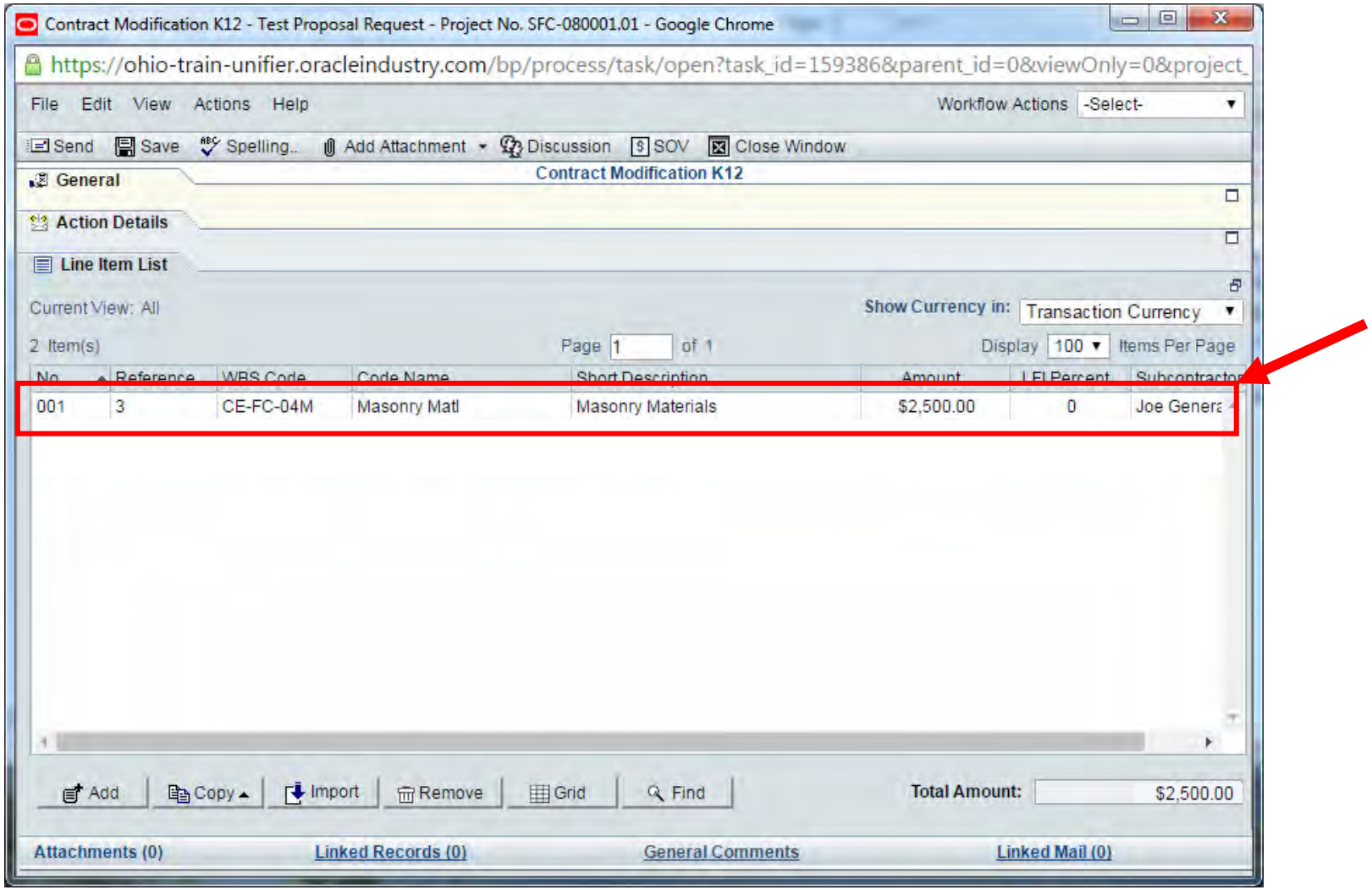
Change a Current Line on the SOV

- Information is populated into the form
- Enter the Amount of the change order
- Enter any other necessary information
- Click OK



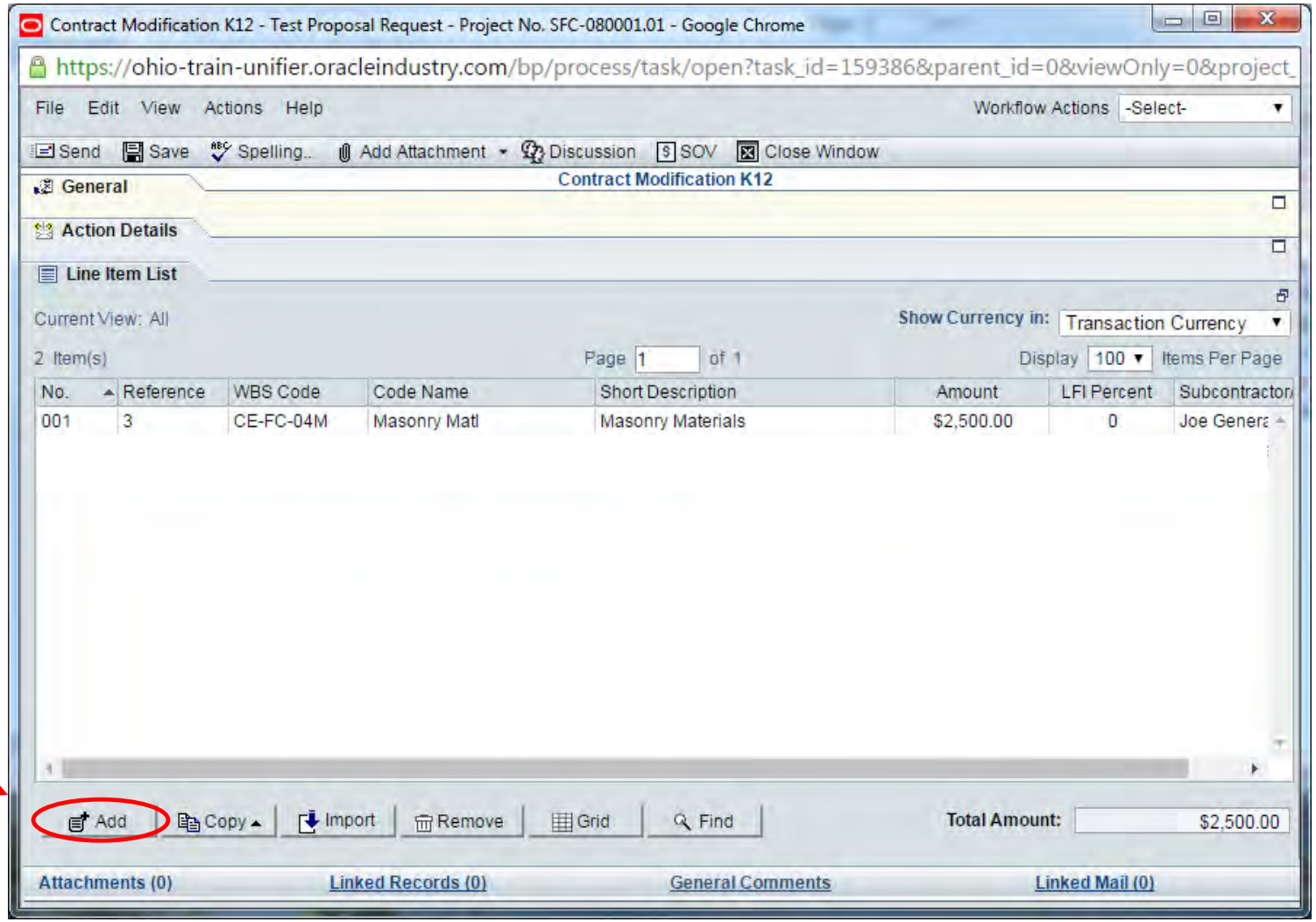
Change a Current Line on the SOV

- Line will populate into the lower form of the record



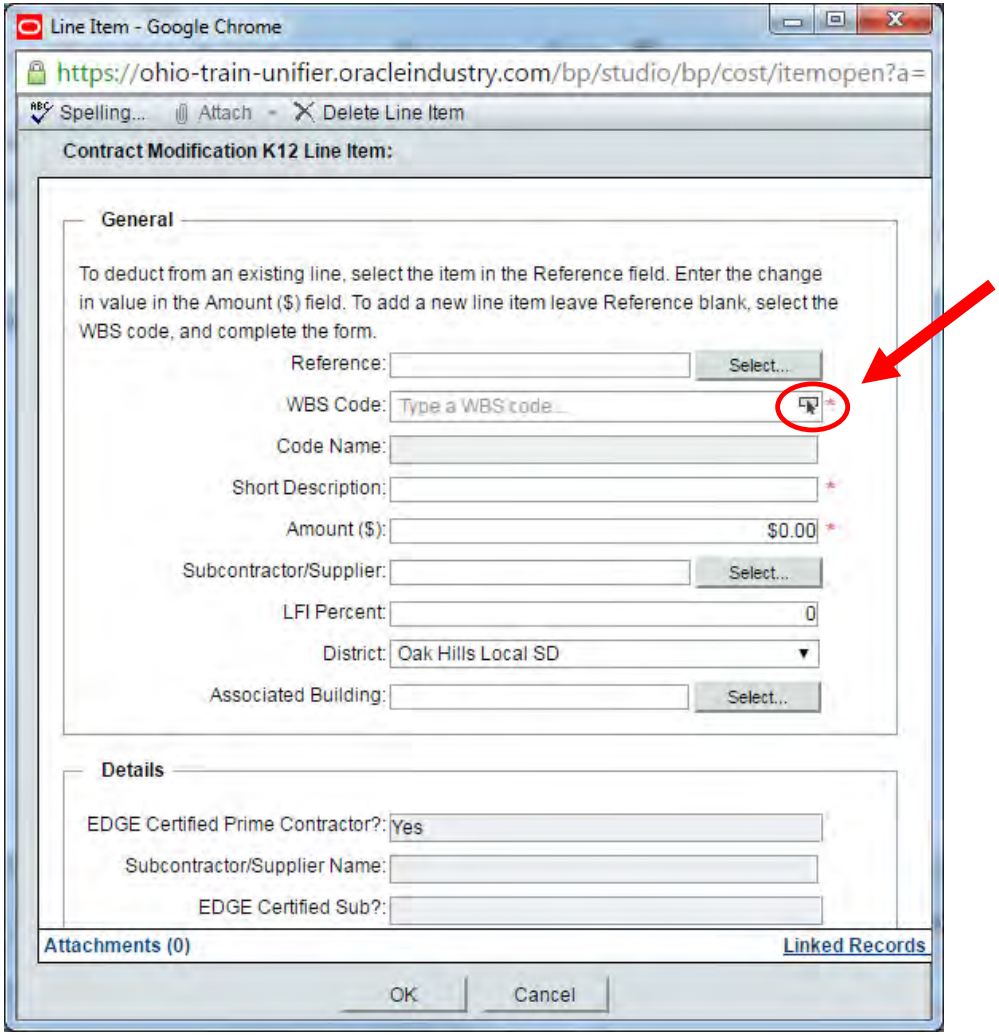
Add other Line Items

- Click Add



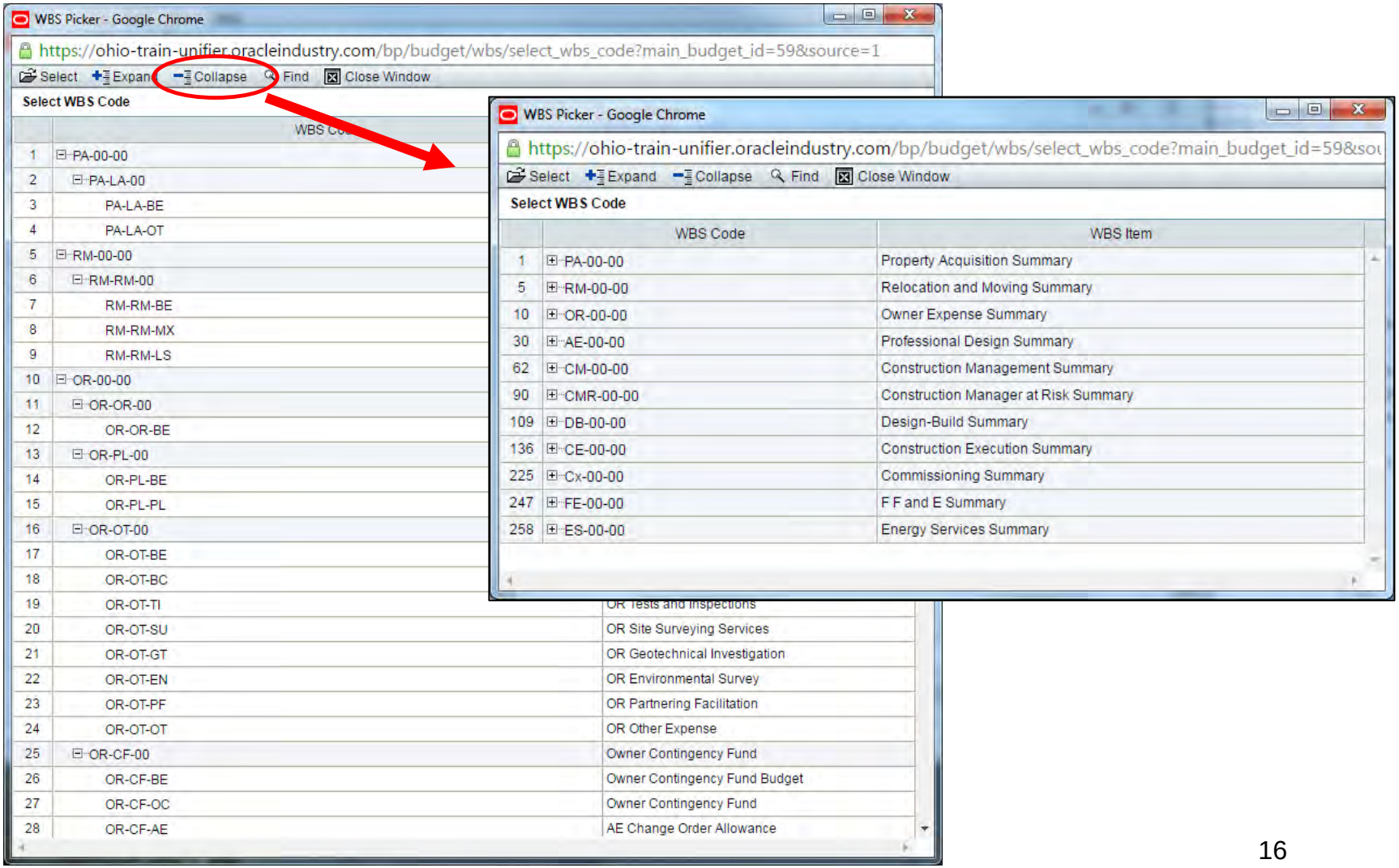
Add a New Line to the SOV

- To Add a New Line to the Contract Schedule of Values (SOV), click the arrow next to WBS Code



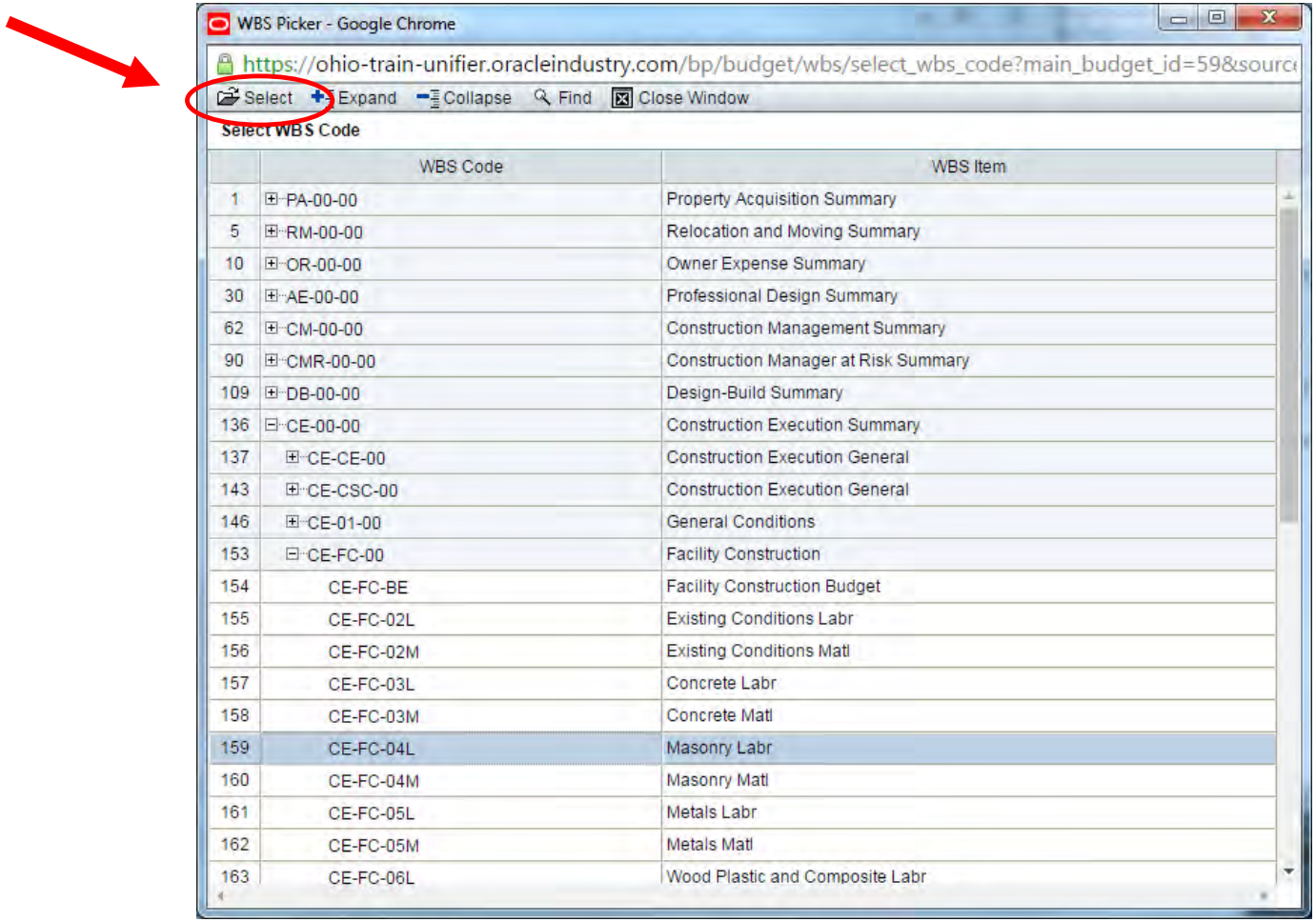
Add a New Line to the SOV

- Click Collapse to simplify the list



Add a New Line to the SOV

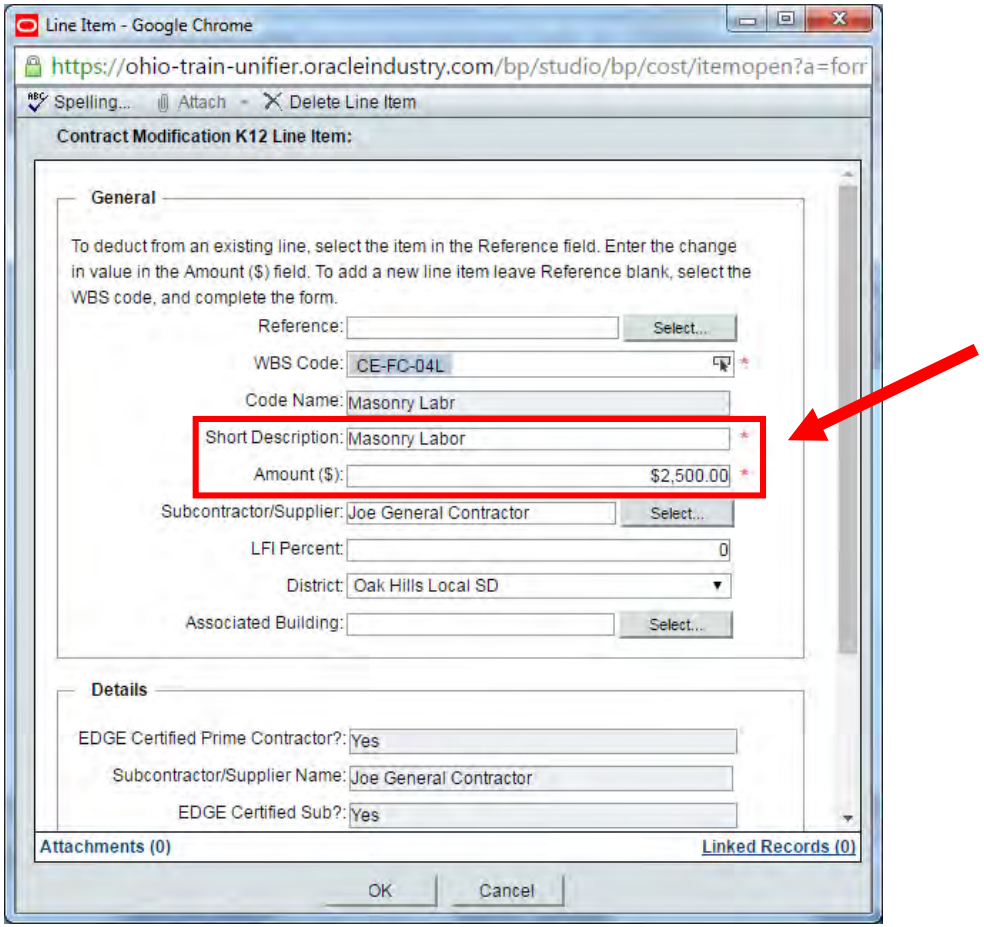
- Click the plus sign next to WBS codes to expand
- Highlight appropriate code and click select



	WBS Code	WBS Item
1	PA-00-00	Property Acquisition Summary
5	RM-00-00	Relocation and Moving Summary
10	OR-00-00	Owner Expense Summary
30	AE-00-00	Professional Design Summary
62	CM-00-00	Construction Management Summary
90	CMR-00-00	Construction Manager at Risk Summary
109	DB-00-00	Design-Build Summary
136	CE-00-00	Construction Execution Summary
137	CE-CE-00	Construction Execution General
143	CE-CSC-00	Construction Execution General
146	CE-01-00	General Conditions
153	CE-FC-00	Facility Construction
154	CE-FC-BE	Facility Construction Budget
155	CE-FC-02L	Existing Conditions Labr
156	CE-FC-02M	Existing Conditions Matl
157	CE-FC-03L	Concrete Labr
158	CE-FC-03M	Concrete Matl
159	CE-FC-04L	Masonry Labr
160	CE-FC-04M	Masonry Matl
161	CE-FC-05L	Metals Labr
162	CE-FC-05M	Metals Matl
163	CE-FC-06L	Wood Plastic and Composite Labr

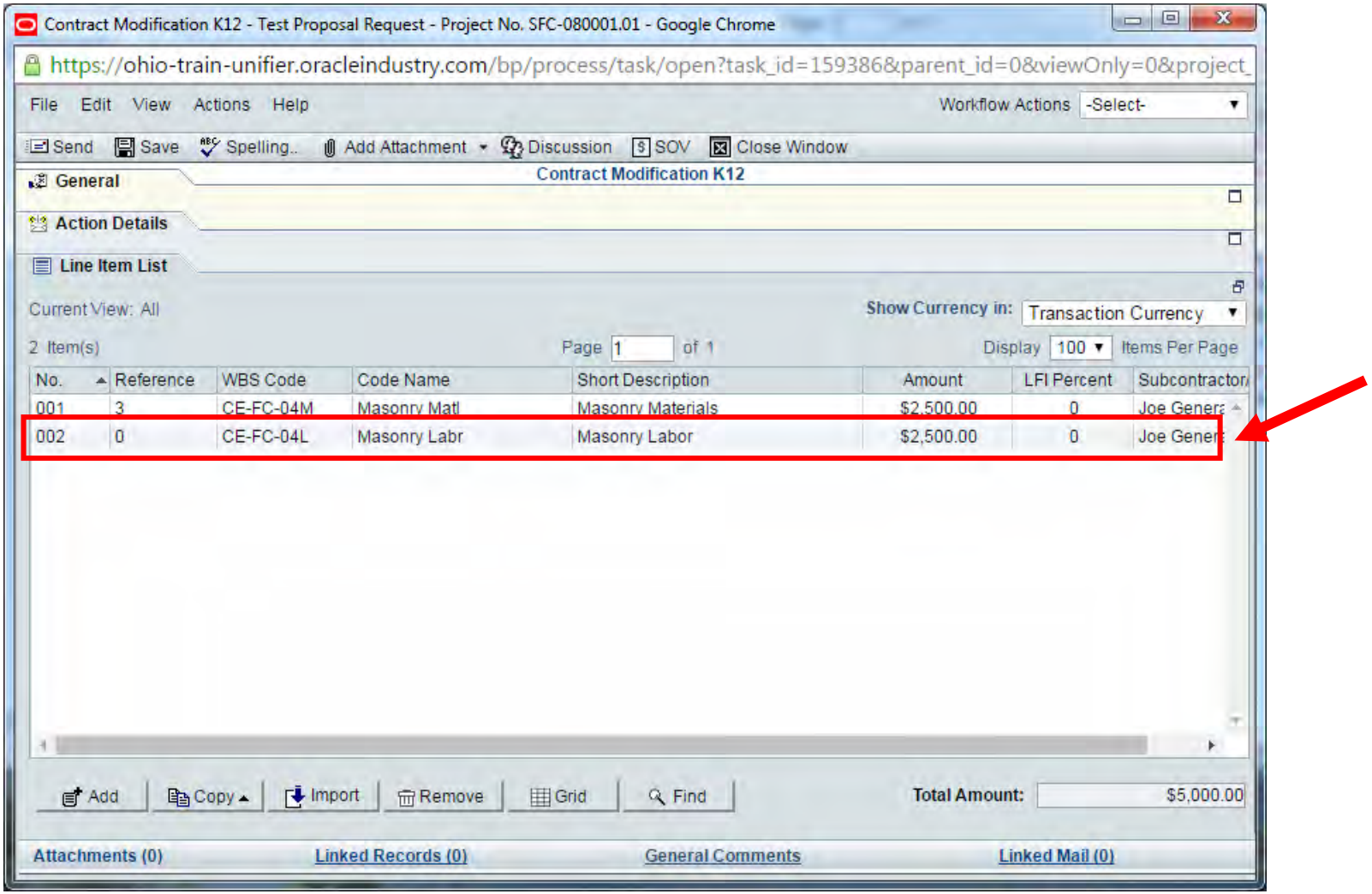
Add a New Line to the SOV

- Information is populated into the form
- Enter a Short Description and the Amount
- Enter any other necessary information
- Click OK



Add a New Line to the SOV

- Line will populate into the lower form of the record



Review Amounts

- Review Change Order Cost and Time Impact Section
- The Difference should always be **$0**

Contract Modification K12 - Test Proposal Request - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=159386&parent_id=0&viewOnly=0&project_

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification K12

Change Order Cost and Time Impact

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:		Total Amount ($):	$5,000.00 *
Contract Days Changed This CO:	45	Line Item Total ($):	$5,000.00
Revised Completion Date:		Difference ($):	$0.00

Basis of Change Order

Change Order Basis: Other Description:

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path: Contracts - Modifications/CM at Risk/ Test Proposal Request

Notes

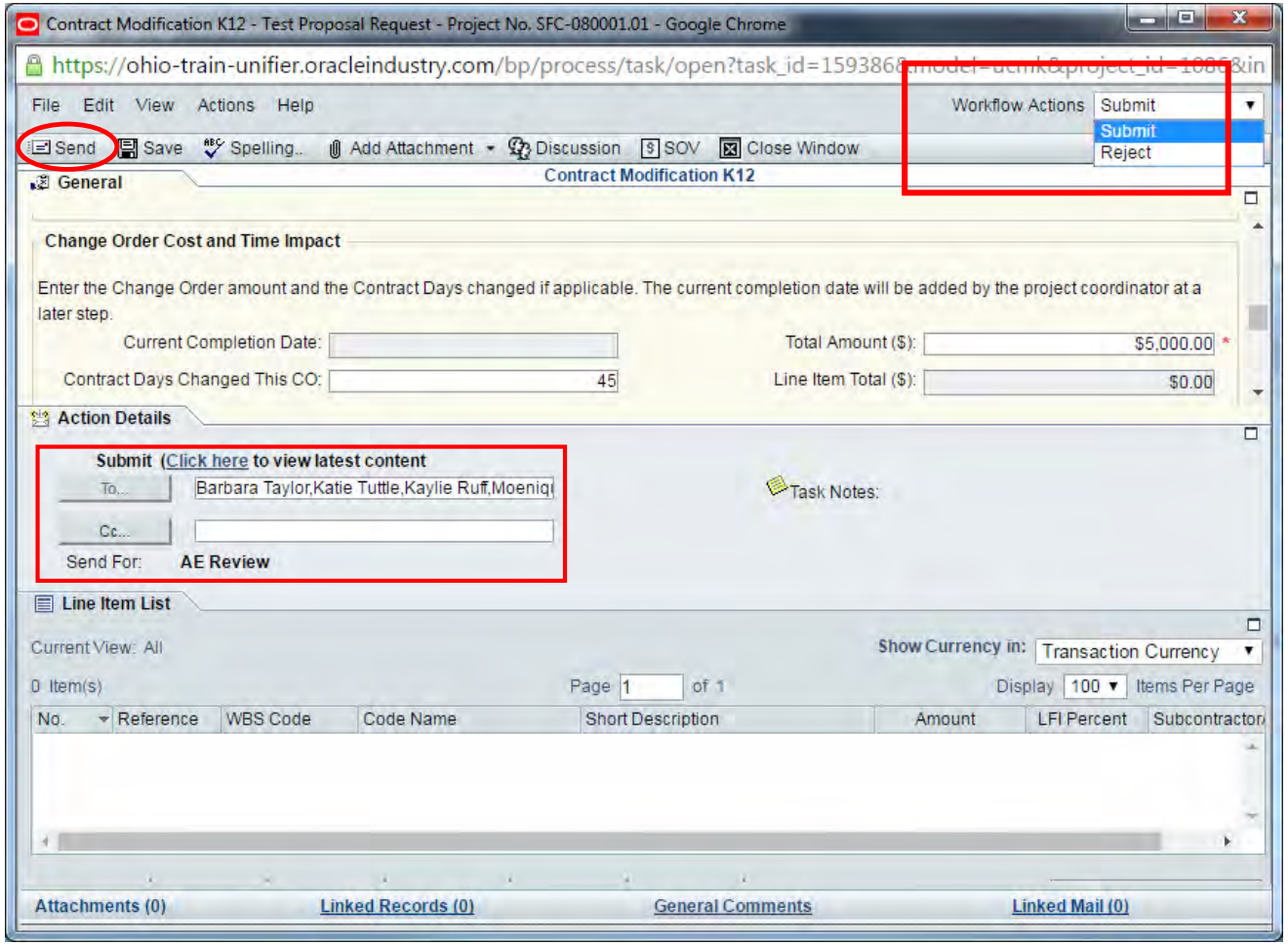
Action Details

Line Item List

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

Send the Record

- Send the record to the A/E for Review
- Select Workflow Action: Submit
- Click Send



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211