



# Proposal Request

## K-12 Cloud

# 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](http://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>

# Purpose and Process

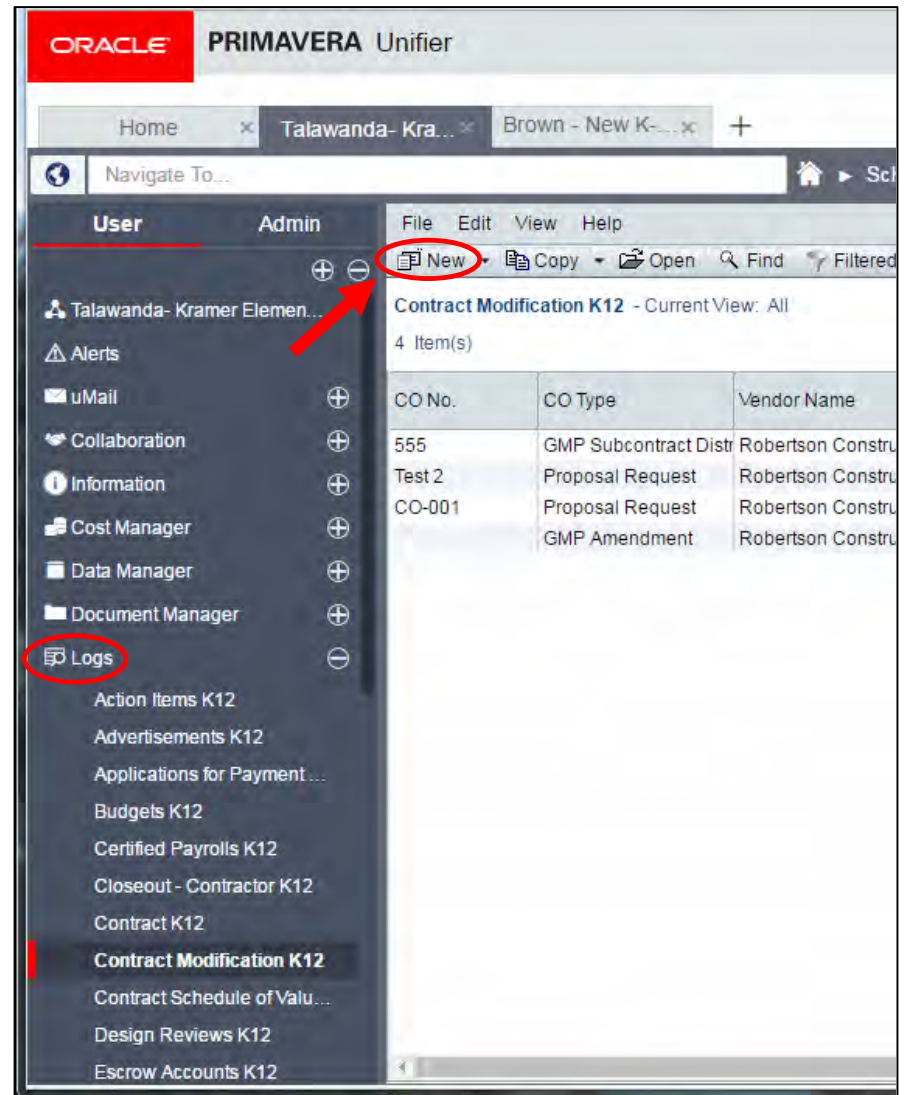
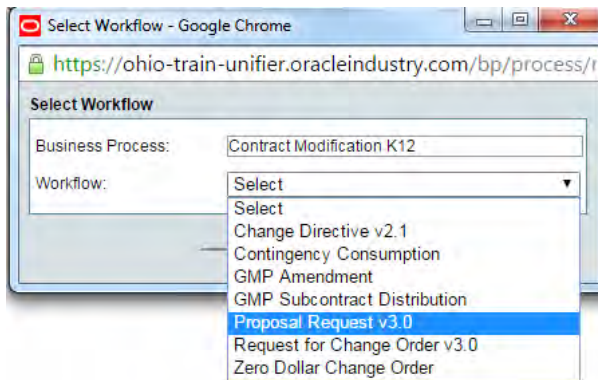
- ▶ Used when the revision to the Contract Schedule of Values will not adversely impact the construction schedule or the finished product if not implemented.
- ▶ The A/E initiates the proposal request and the Contractor provides pricing and time impact.
- ▶ Proposal Requests are initiated in OAKS CI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

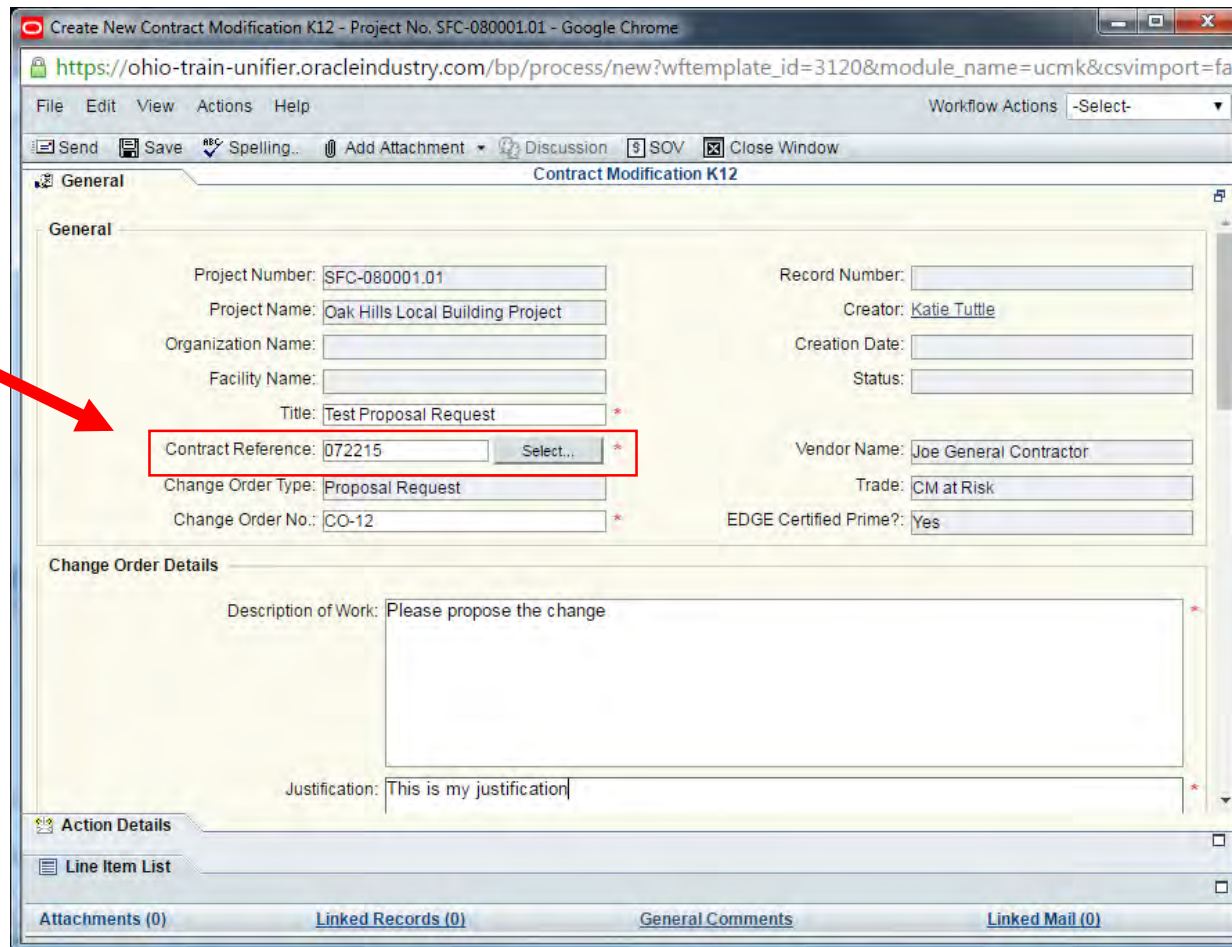
# Proposal Request Creation

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Contract Modifications K12
  - ▶ 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



Create New Contract Modification K12 - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\_id=3120&module\_name=ucmk&csvimport=fa

File Edit View Actions Help Workflow Actions -Select-

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

Contract Modification K12

General

General

Project Number: SFC-080001.01 Record Number:

Project Name: Oak Hills Local Building Project Creator: Katie Tuttle

Organization Name:  Creation Date:

Facility Name:  Status:

Title: Test Proposal Request \*

Contract Reference: 072215 Select... \*

Change Order Type: Proposal Request Vendor Name: Joe General Contractor

Change Order No.: CO-12 \* Trade: CM at Risk

EDGE Certified Prime?: Yes

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 Contract Modification K12 - Project No. SFC-080001.01 - Google Chrome". The URL is [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=3120&module\\_name=ucmk&csvimport=fa](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3120&module_name=ucmk&csvimport=fa). The page title is "Contract Modification K12".

The "General" tab is active, and the "Change Order Details" section is highlighted with a red border. It contains two text areas:

- Description of Work:** Please propose the change
- Justification:** This is my justification

Below the "Change Order Details" section is the "Change Order Cost and Time Impact" section, which includes the following fields:

Current Completion Date:	<input type="text"/>	Total Amount (\$):	<input type="text" value="\$0.00"/>
Contract Days Changed This CO:	<input type="text" value="0"/>	Line Item Total (\$):	<input type="text" value="\$0.00"/>
Revised Completion Date:	<input type="text"/>	Difference (\$):	<input type="text" value="\$0.00"/>

Below the "Change Order Cost and Time Impact" section is the "Basis of Change Order" section, which includes the following fields:

- Change Order Basis:
- Other Description:

At the bottom of the page, there are four tabs: "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 'Create New Contract Modification K12' form in Google Chrome. The browser address bar displays the URL: [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=3120&module\\_name=ucmk&csvimport=fa](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3120&module_name=ucmk&csvimport=fa). The form is titled 'Contract Modification K12' and is in the 'General' tab. The 'General' section contains the following fields:

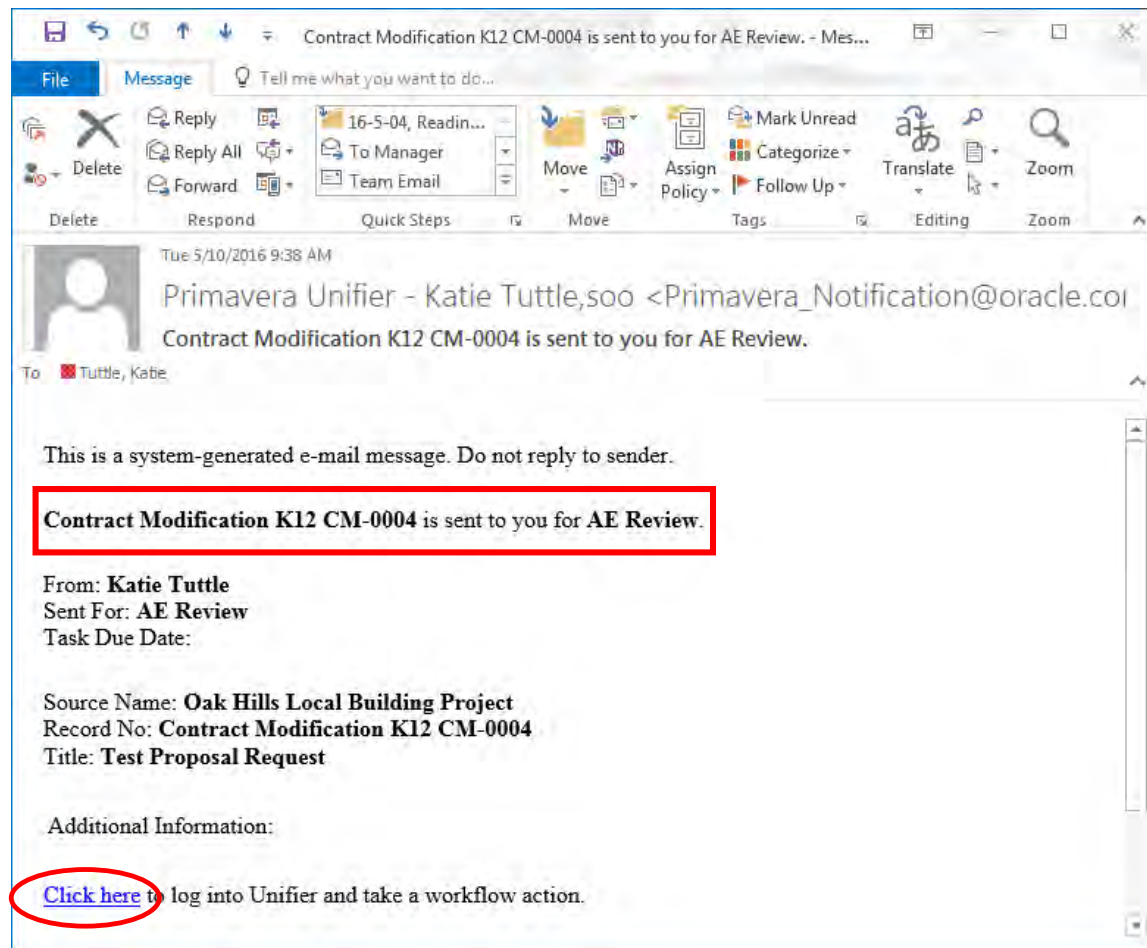
- Project Number: SFC-080001.01
- Project Name: Oak Hills Local Building Project
- Organization Name: [Empty]
- Facility Name: [Empty]
- Title: Test Proposal Request \*
- Record Number: [Empty]
- Creator: Katie Tuttle
- Creation Date: [Empty]
- Status: [Empty]

The 'Action Details' section is expanded, showing the 'Submit' action. The 'To...' field is set to 'Contractor' and the 'Send For' field is set to 'Proposal Creation'. The 'Workflow Actions' dropdown menu is open, showing 'Submit' selected. A red arrow points to the 'Submit' button in the workflow actions menu.

The 'Line Item List' section is currently empty, showing 0 item(s) on page 1 of 1. The 'Total Amount' is \$0.00.

# 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

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=159414&parent\\_id=0&viewOnly=0&project...](https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=159414&parent_id=0&viewOnly=0&project...)

File Edit View Actions Help

**Accept Task** Decline Task SOV Close Window

### 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: [A. E. Barbara Taylor](#) 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	LFI Percent	Subcontractor
002	0	CE-FC-04L	Masonry Labr	Masonry Labor	\$2,500.00	0	Joe Genera
001	3	CE-FC-04M	Masonry Matl	Masonry Materials	\$2,500.00	0	Joe Genera

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

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=159414&model=ucmk&project\\_id=1086&in](https://ohio-train-unifier.oracleindustry.com/bp/process/task/open?task_id=159414&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

**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

Title: Test Proposal Request \*

Contract Reference: 872245 Vendor Name: ...

(Click here to view latest content)

To: Cc: Send For: 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	LFI Percent	Subcontractor
002	0	CE-FC-04L	Masonry Labr	Masonry Labor	\$2,500.00	0	Joe Genera
001	3	CE-FC-04M	Masonry Matl	Masonry Materials	\$2,500.00	0	Joe Genera

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

The screenshot displays the 'Contract Modification K12' interface. The top toolbar contains a 'Send' button, which is highlighted by a red arrow. The 'Workflow Actions' dropdown menu is open, showing 'Accept' as the selected action. The 'Action Details' section is highlighted with a red box, showing the 'To:' field with the email address 'Barbara Taylor,Katie Tuttle,Kaylie Ruf,Moeniq' and the 'Send For:' field set to 'PM Review'. The 'Line Item List' section shows a table with 2 items, including 'Masonry Labor' and 'Masonry Materi'.

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor
002	0	CE-FC-04L	Masonry Labr	Masonry Labor	\$2,500.00	0	Joe Gener
001	3	CE-FC-04M	Masonry Mati	Masonry Materials	\$2,500.00	0	Joe Gener

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211