



# 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 Create
  - ▶ Select Proposal Request Workflow

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'ORACLE', 'PRIMAVERA Unifier (Development)', and the user 'Katie Tuttle'. The main navigation menu on the left is expanded to show 'Logs', which is circled in red. A red arrow points from 'Logs' to 'Contract Modification K12' in the sub-menu. The 'Contract Modification K12' sub-menu is also highlighted with a red bar. The main content area shows a 'Contract Mod' table with a '+ Create' button circled in red. A dropdown menu is open from the '+ Create' button, listing various contract modification types. A red arrow points to 'Proposal Request v3.0' in the dropdown menu. The table below the dropdown menu shows a list of contract modifications with columns for CO No., Description, and other details.

| CO No.  | Description                   | Other                  |
|---------|-------------------------------|------------------------|
| 1       |                               |                        |
| CO-0003 | Proposal Request v3.0         | nt... 07               |
| CO-0002 | Request for Change Order v3.0 | nt... 07               |
| CO-0001 | Zero Dollar Change Order      | nt... 07               |
| GMP1    | GMP Amendment                 | Joe General Cont... 07 |
| CO-12   | Proposal Request              | Joe General Cont... 07 |
| 12345   | Proposal Request              | Joe General Cont... 07 |
| CO-02   | GMP Subcontract ...           | Joe General Cont... 07 |
| CO-001  | GMP Subcontract ...           | Joe General Cont... 07 |

# 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

Secure | [https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate\\_id=3120&module\\_name=ucmk&project](https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3120&module_name=ucmk&project)

File Edit View Actions Help

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

**General** Contract Modification K12

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: Proposal Request 001 \*

Contract Reference: 072215 Select... \*

Change Order Type: Proposal Request

Contractor Name: Joe General Contractor

Change Order No.: 001 \*

Trade: CM at Risk

EDGE Certified Prime?: Yes

Change Order Details

Description of Work:  \*

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-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate\_id=3120&module\_name=ucmk&projec". The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". The application's workflow actions include "Submit", "Send", "Save", "Spelling..", "Add Attachment", "Discussion", "SOV", and "Close Window".

The main form is titled "Contract Modification K12" and is in the "General" section. It contains the following fields:

- Change Order type:
- Change Order No.:  \*
- EDGE Certified Prime?:
- Change Order Details section (highlighted with a red box):
  - Description of Work:  \*
  - Justification:  \*
- Change Order Cost and Time Impact section:
  - Current Completion Date:
  - Contract Days Changed This CO:
  - Total Amount (\$):
  - Line Item Total (\$):

At the bottom of the form, there are sections for "Action Details", "Line Item List", "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# Send the Record

- ▶ Verify Workflow Action
- ▶ “To” box in Action Details will populate with recipient
- ▶ Click Send

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

URL: [https://ohio-dev-unifier.oracleindustry.com/.../process/new?fromMasterLog=1&wftemplate\\_id=3120&module\\_name=ucmk&projec](https://ohio-dev-unifier.oracleindustry.com/...)

Menu: File Edit View Actions Help

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

Section: General Contract Modification K12

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:

Section: Action Details

Submit

To... CM-R, Contractor

Cc...

Send For: Proposal Creation

Section: Line Item List

Current View: All

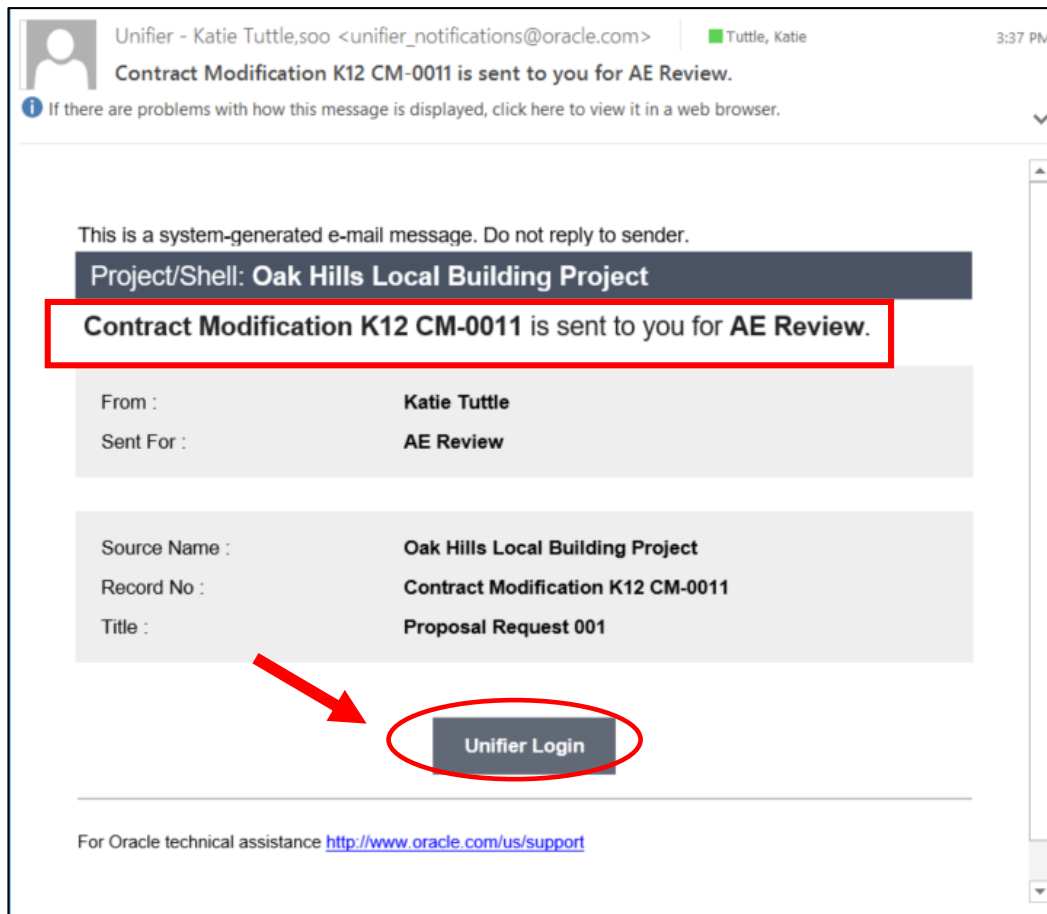
0 Item(s) Page 1 of 1 Display 100 Items Per Page

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

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

Contract Modification K12 - Proposal Request 001 - Project No. SFC-080001.01 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\_id=186791&viewOnly=0&project\_id=0&\_\_uref=uuu838:navi

File Edit View Actions Help

**Accept Task** Decline Task SOV Review Close Window

**Contract Modification K12**

**General**

General

Project Number: SFC-080001.01 Record Number: CM-0011

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

Organization Name: Creation Date: 06/16/2017 11:26 AM (UTC-8)

Facility Name: Status: Pending

**Task Details**

From: [Katie Tuttle](#) Task Due Date: Task Notes (0)

To: [A. E. Archana Atrey](#) [More..](#) Task Status: Not Started [Workflow Progress](#)

Cc:

Sent For: AE Review

**Line Item List**

Current View: All Show Currency in: Transaction Currency

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

| No. | Reference | WBS Code  | Code Name                | Short Description | Amount     | LFI Percent | Subcontractor/Sur |
|-----|-----------|-----------|--------------------------|-------------------|------------|-------------|-------------------|
| 004 | 0         | CE-FC-02L | Existing Conditions Labr | Existing Labor    | \$2,500.00 | 0           |                   |
| 003 | 0         | CE-FC-02M | Existing Conditions Matl | Existing Material | \$2,500.00 | 0           |                   |
| 002 | 0         | CE-FC-04L | Masonry Labr             | Masonry Labor     | \$500.00   | 0           |                   |

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

Contract Modification K12 - Proposal Request 001 - Project No. SFC-080001.01 - Google Chrome

Secure | [https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\\_id=186791&model=ucmk&project\\_id=1086&initiateBP=&bulkai](https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186791&model=ucmk&project_id=1086&initiateBP=&bulkai)

File Edit View Actions Help

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

**General** Contract Modification K12

**General**

Project Number: SFC-080001.01 Record Number: CM-0011  
Project Name: Oak Hills Local Building Project Creator: Katie Tuttle  
Organization Name: Creation Date: 06/16/2017 11:26 AM (UTC-8)  
Facility Name: Status: Pending  
Title: Proposal Request 001 \*

**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

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

| No. | Reference | WBS Code  | Code Name                | Short Description | Amount     | LFI Percent | Subcontractor/Sup |
|-----|-----------|-----------|--------------------------|-------------------|------------|-------------|-------------------|
| 004 | 0         | CE-FC-02L | Existing Conditions Labr | Existing Labor    | \$2,500.00 | 0           |                   |
| 003 | 0         | CE-FC-02M | Existing Conditions Matl | Existing Material | \$2,500.00 | 0           |                   |
| 002 | 0         | CE-FC-04L | Masonry Labr             | Masonry Labor     | \$500.00   | 0           |                   |
| 001 | 2         | CE-FC-03M | Concrete Matl            | Concrete Material | -\$500.00  | 0           |                   |

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

Contract Modification K12 - Proposal Request 001 - Project No. SFC-080001.01 - Google Chrome

Secure | [https://ohio-dev-unifier.oracleindustry.com/.../process/task/open?task\\_id=186791&model=ucmk&project\\_id=1086&initiateBP=&bulkautoaccept=&fromRefLog-](https://ohio-dev-unifier.oracleindustry.com/.../process/task/open?task_id=186791&model=ucmk&project_id=1086&initiateBP=&bulkautoaccept=&fromRefLog-)

File Edit View Actions Help

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

General: Accept (dropdown) | Return for Clarification

Contract Modification K12

General

Project Number: SFC-080001.01 | Record Number: CM-0011  
Project Name: Oak Hills Local Building Project | Creator: Katie Tuttle  
Organization Name: | Creation Date: 06/16/2017 11:26 AM (UTC-8)  
Facility Name: | Status: Pending  
Title: Proposal Request 001 \*

Action Details

Accept (Click here to view latest content)

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

Cc...:

Send For: PM Review

Task Notes:

Workflow Progress

Line Item List

Current View: All | Show Currency in: Transaction Currency

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

| No. | Reference | WBS Code  | Code Name                | Short Description | Amount     | LFI Percent | Subcontractor/Sup |
|-----|-----------|-----------|--------------------------|-------------------|------------|-------------|-------------------|
| 004 | 0         | CE-FC-02L | Existing Conditions Labr | Existing Labor    | \$2,500.00 | 0           |                   |
| 003 | 0         | CE-FC-02M | Existing Conditions Matl | Existing Material | \$2,500.00 | 0           |                   |
| 002 | 0         | CE-FC-04L | Masonry Labr             | Masonry Labor     | \$500.00   | 0           |                   |

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:

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

614.644.2211