



Proposal Request

K-12 Legacy

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>

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 Modification

▶ Click New

▶ Select Workflow



Select Workflow

Business Process: Select

Workflow: Change Directive v2.1
Proposal Request v3.0
Zero Dollar Change Order

OK Cancel

Unifier@https://oaksci.osfc.ohio.gov - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/nav/main/user#t:us_sf,m:user,p:1038,lc:ucm

ORACLE Primavera Unifier Katie Tuttle on behalf of Gary Plas (Last login: 05/09/2016 09:39 AM)Community Book

Home Company Workspace School Facilities

School Facilities > Lancaster-CSD-FAI-E

User Mode

File Edit View Help

New Copy Open Find Filtered By

Contract Modification - Current View: All

3 Item(s)

| CO No. | CO Type | Vendor Name | Contract SO |
|--------|-----------------------|-----------------------|-------------|
| 12345 | Proposal Request | Joe General Contracto | 072215 |
| CO-02 | GMP Subcontract Distr | Joe General Contracto | 072215 |
| CO-001 | GMP Subcontract Distr | Joe General Contracto | 072215 |

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 - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate_id=8483&module_name=ucm&csvimport=false&project_id=1038&attach=\${attach}&fromDm=&p

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:

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 - Project No. SFC-130322.01 - Internet Explorer". The address bar shows the URL: [https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate_id=8483&module_name=ucm&csvimport=false&project_id=1038&attach=\\${attach}&fromDm=&p](https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate_id=8483&module_name=ucm&csvimport=false&project_id=1038&attach=${attach}&fromDm=&p). The browser menu includes File, Edit, View, Actions, and Help. The page title is "Contract Modification K12".

The main content area is titled "General" and contains the "Change Order Details" section, which is highlighted with a red border. This section includes two text input fields:

- 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 contains several input fields:

- Current Completion Date:
- Contract Days Changed This CO:
- Revised Completion Date:
- Total Amount (\$):
- Line Item Total (\$):
- Difference (\$):

Below the "Change Order Cost and Time Impact" section is the "Basis of Change Order" section, which contains a dropdown menu for "Change Order Basis" (set to "-Select-") and an "Other Description" text input field.

At the bottom of the page, there are several tabs and links:

- Action Details
- Line Item List
- Attachments (0)
- [Linked Records \(0\)](#)
- [General Comments](#)
- [Linked Mail \(0\)](#)

Send the Record

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

Workflow Actions: Submit

Submit

Send

Save

Spelling...

Add Attachment

Discussion

SOV

Close Window

Contract Modification K12

General

Project Number: SFC-080001.01

Project Name: Oak Hills Local Building Project

Organization Name:

Facility Name:

Title: Test Proposal Request

Record Number:

Creator: Katie Tuttle

Creation Date:

Status:

Submit

To... Contractor

Cc...

Send For: Proposal Crtion

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 | LFI Percent | Subcontractor |
|-----|-----------|----------|-----------|-------------------|--------|-------------|---------------|
|-----|-----------|----------|-----------|-------------------|--------|-------------|---------------|

Total Amount: \$0.00

Attachments (0)

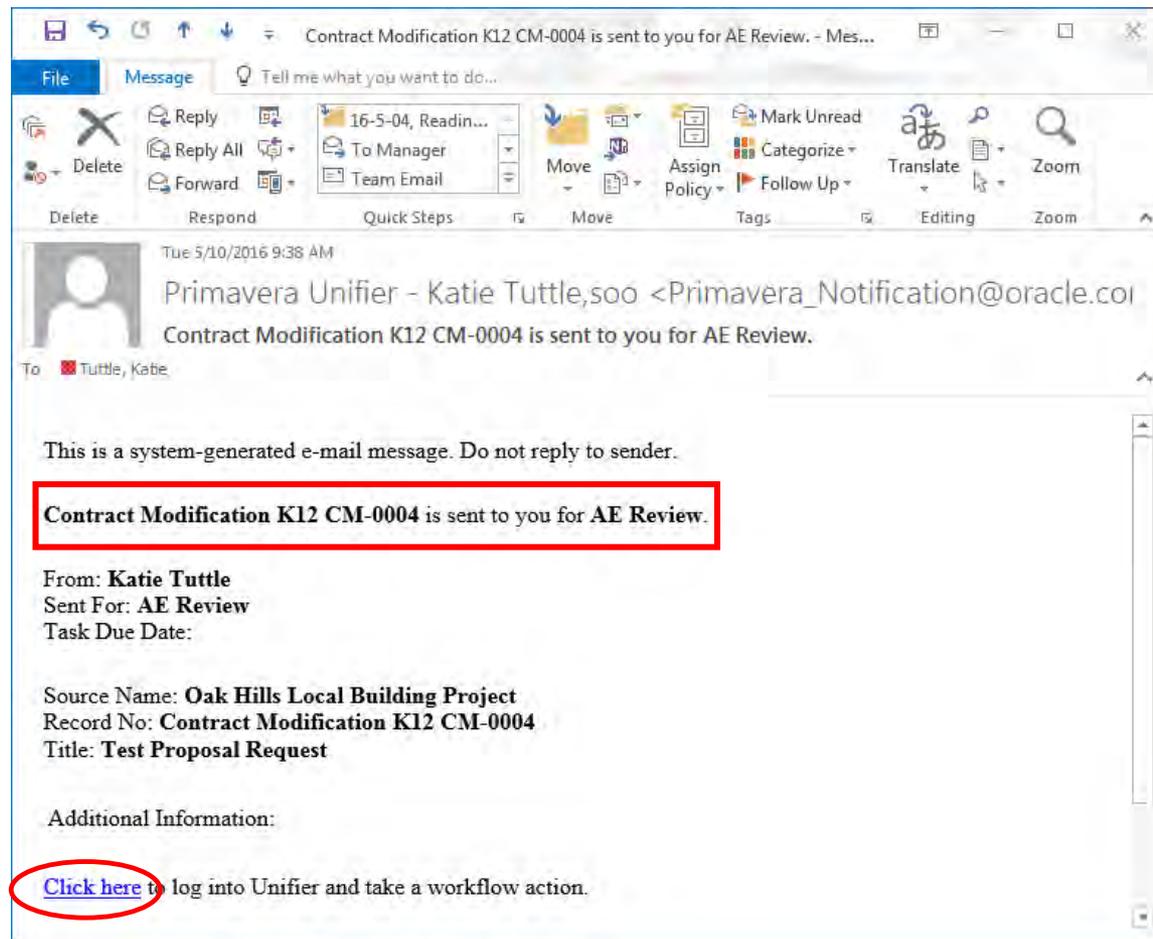
Linked Records (0)

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

Contract Modification - PR 111 - Project No. SFC-130325.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/process/task/open?task_id=457671&parent_id=0&viewOnly=0&project_id=1044

File Edit View Actions Help

Accept Task Decline Task SOV Close Window

Contract Modification K12

General

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

Grid Find 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 - PR 111 - Project No. SFC-130325.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/process/task/open?task_id=457671&parent_id=0&viewOnly=0&project_id=1044

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: 072245 Vendor Name: [Redacted]

(Click here to view latest content)

To: [Redacted]

Cc: [Redacted]

Send For: [Redacted]

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 a web application interface for a contract modification. The browser title is "Contract Modification - PR 111 - Project No. SFC-130325.01 - Internet Explorer". The URL is "https://oaksci.osfc.ohio.gov/bp/process/task/open?task_id=457671&parent_id=0&viewOnly=0&project_id=1044".

The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with buttons for "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The "Send" button is circled in red, and a red arrow points to it from the left.

The main content area is titled "Contract Modification K12" and contains a "General" section with the following fields:

- 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

Below the "General" section is the "Action Details" section, which is circled in red. It contains the following information:

- Action: Accept (Click here to view latest content)
- To: Barbara Taylor, Katie Tuttle, Kaylie Ruf, Moeniq
- Send For: PM Review

The "Line Item List" section is also visible, showing a table with 2 items:

| 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 Matl | Masonry Materials | \$2,500.00 | 0 | Joe Gener |

The bottom of the interface shows a "Total Amount" of \$5,000.00 and several utility buttons: "Add", "Copy", "Import", "Remove", "Grid", and "Find". There are also links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211