



# Expedited Deduct Change Order

# Purpose and Process

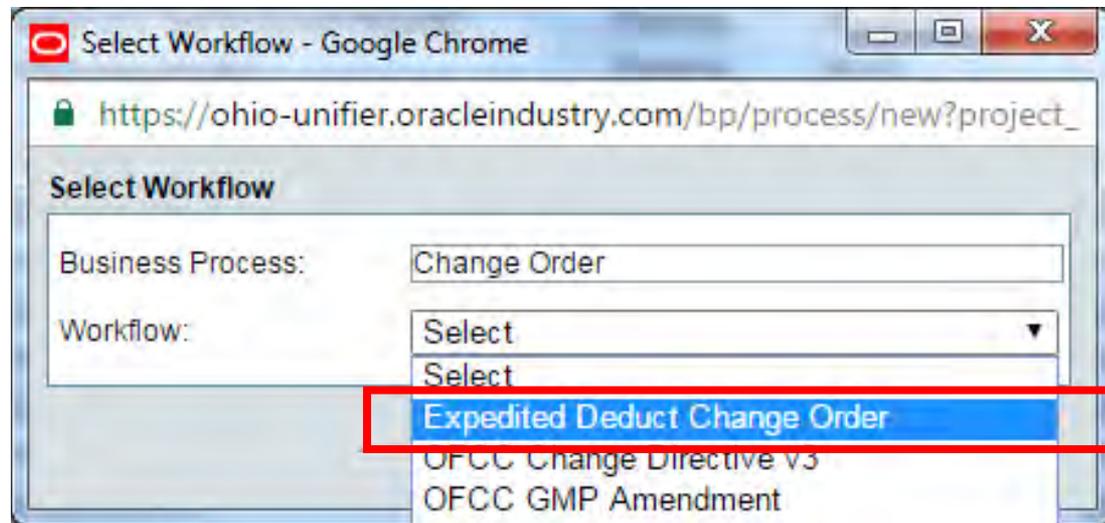
- ▶ Used when there is a change order that will contain deduct lines.
- ▶ Using this process **will not** lock the schedule of values.

- ▶ **Workflow:**

Created by: A/E → Sent to: Contractor for Proposal Creation (add lower lines) → Sent to: PC for DocuSign → PC then creates the DocuSign document. Once DocuSign process is complete, PC will attach DocuSign document and End the record.

# A/E Selects Workflow

- ▶ A/E will select the **Expedited Deduct Change Order** workflow



Select Workflow - Google Chrome

[https://ohio-unifier.oracleindustry.com/bp/process/new?project\\_](https://ohio-unifier.oracleindustry.com/bp/process/new?project_)

Select Workflow

Business Process: Change Order

Workflow: Select

Expedited Deduct Change Order

OFCC Change Directive v3

OFCC GMP Amendment

# A/E Creates Record

- ▶ A/E will complete the General section including:
  - ▶ Title, Contract Reference, Change order type, Change order number

EXPEDITED DEDUCT CHANGE ORDER - Use this work flow only for change orders with deduct line items. Do NOT use this work flow for Subcontractor Distributions of GMP Amendments or Contingency Consumption request. Using this work flow will prevent the schedule of values from being locked during processing. On submission the Proposal Request will go to ONE contractor representative and ONE Project Coordinator to process.

**General**

Organization:	Department of Administrative Services	Record Number:	
Project Number:	OCI-080001	Creator:	Katie Tuttle
Project Name:	Agency General Projects Test	Creation Date:	
Project Location:	OAKS CI Administration	Status:	
Title:	Expedited CO 1	Trade:	General Trades
Contract Reference:	OCI-090002-002	Contractor Name:	OCI Test General
Change Order Type:	Proposal Request	EDGE Certified Prime?:	No
Change Order No.:	CO-0159	Fee Title:	SAO Standard Fee 1

**Action Details**

**Line Item List**

Attachments (0)    [Linked Records \(0\)](#)    [General Comments](#)    [Linked Mail \(0\)](#)

# A/E Creates Record

- ▶ A/E will complete the Change Order Details section including:
  - ▶ Description of Work and Justification

Create New Change Order - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate\_id=135811&module\_name=uco&csvimport=false&project\_id=1003

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

Change Order

General

Description of Work: This is my description of work

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

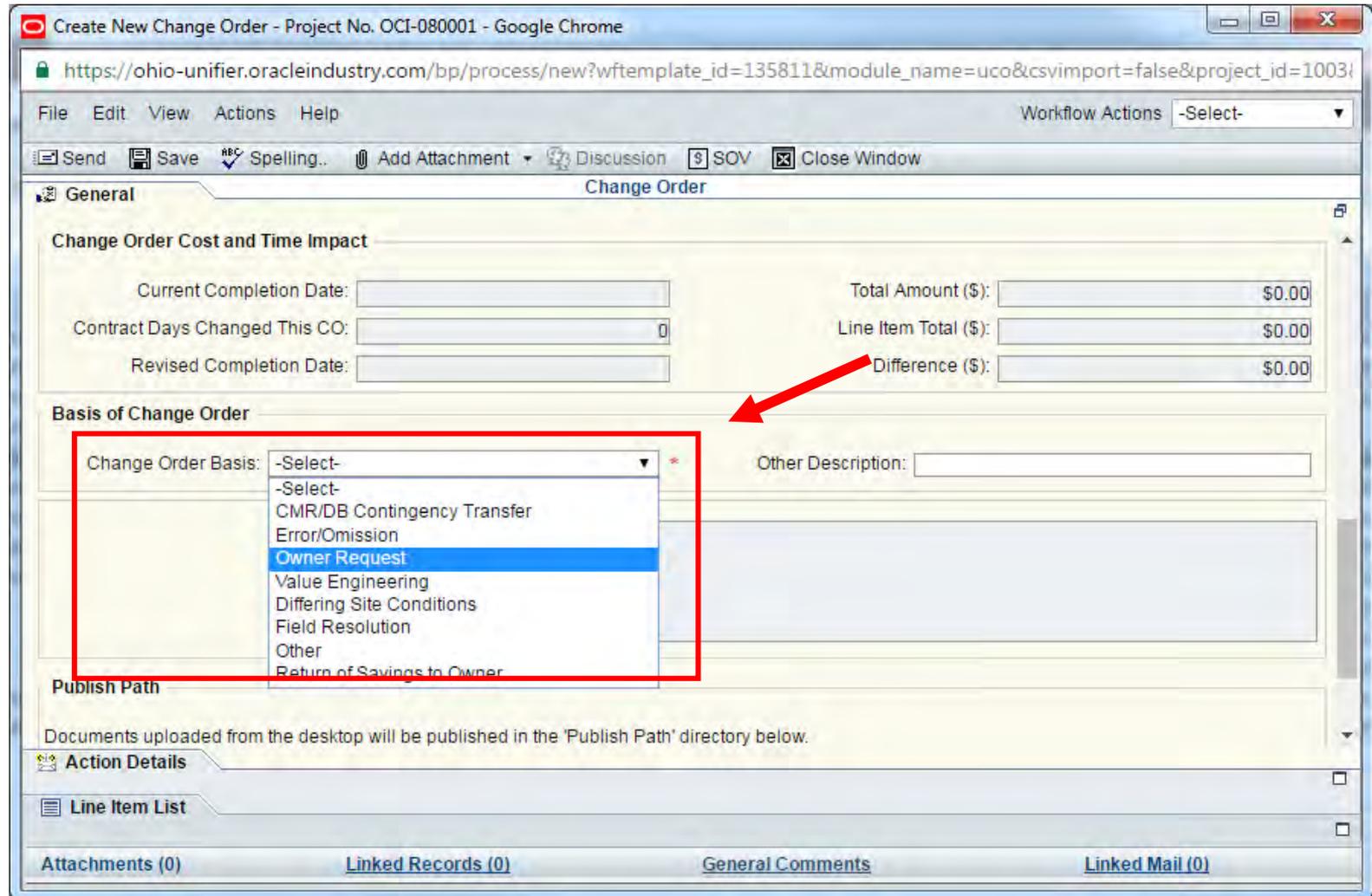
Action Details

Line Item List

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# A/E Creates Record

- ▶ A/E will also now complete the Change Order Basis field



The screenshot displays 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=135811&module\\_name=uco&csvimport=false&project\\_id=1003](https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=135811&module_name=uco&csvimport=false&project_id=1003). The page shows a "Change Order" form with the following sections:

- Change Order Cost and Time Impact:**
  - Current Completion Date:
  - Contract Days Changed This CO:
  - Revised Completion Date:
  - Total Amount (\$):
  - Line Item Total (\$):
  - Difference (\$):
- Basis of Change Order:**
  - Change Order Basis:  (dropdown menu is open, showing options: -Select-, CMR/DB Contingency Transfer, Error/Omission, **Owner Request**, Value Engineering, Differing Site Conditions, Field Resolution, Other, Return of Savings to Owner)
  - Other Description:
- Publish Path:**

Documents uploaded from the desktop will be published in the 'Publish Path' directory below.
- Action Details:**
- Line Item List:**

At the bottom of the form, there are links for [Attachments \(0\)](#), [Linked Records \(0\)](#), [General Comments](#), and [Linked Mail \(0\)](#).

# A/E Sends Record

- ▶ Choose workflow action “Expedite Change Order”
- ▶ In Action Details the “To” box will be populated with the people who the record should go to.
- ▶ Click Send

Create New Change Order - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate\_id=135811&module\_name=uco&csvimport=false&project\_id=10031

File Edit View Actions Help

Workflow Actions: Expedite Change Order

Expedite Change Order

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General

Change Order

Project Number: OCI-080001

Project Name: Agency General Projects Test

Project Location: OAKS CI Administration

Title: Test Deduct

Contract Reference: OCI-090002-002

Change Order Type: Proposal Request

Creation Date:

Status:

Trade: General Trades

Contractor Name: OCI Test General

EDGE Certified Prime?: No

Action Details

Expedite Change Order

To... Katie Tuttle,Shauna Hooks,Deduct\_CO\_Actors

Cc... Katie Tuttle,Rita Nichols,Sara Freetage,Shaun

Send For: Proposal Creation and DocuSign Wait

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	Subcont
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Add Copy Import Remove Grid Find

Total Amount: \$0.00

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

# Contractor enters Amount

- ▶ When the Contractor receives the task, enter the “Total Amount” in the General form.
- ▶ Add any necessary documentation

Change Order - Expedited CO 1 - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\_id=1177712&parent\_id=0&viewOnly=0&project\_id=1003&\_uref=uu

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling Add Attachment Discussion SOV Close Window

**General** Change Order

**Change Order Cost and Time Impact**

Current Completion Date:	<input type="text"/>	Total Amount (\$):	<input type="text" value="(\$5,000.00)"/>
Contract Days Changed This CO:	<input type="text"/>	Line Item Total (\$):	<input type="text" value="\$0.00"/>
Revised Completion Date:	<input type="text"/>	Difference (\$):	<input type="text" value="(\$5,000.00)"/>

**Basis of Change Order**

Change Order Basis:  Other Description:

Notes:

**DocuSign Change Order Approval**

DocuSign workflow actions will be entered by the Coordinator at the close of the DocuSign Process Wait step.

Contractor <input type="text"/>	<input type="button" value="Select..."/>	Contractor <input type="text"/>	Contractor <input type="text"/>
Signature by:		Email:	Date:
Owners <input type="text" value="Omar Rodriguez"/>		Owner's <input type="text" value="OR3@das.net"/>	Owner <input type="text"/>
Representative:		Email:	Date:
Project <input type="text" value="Steve Mayo"/>		PM Email: <input type="text" value="PM1@das.net"/>	PM Date: <input type="text"/>

**Action Details**

**Line Item List**

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Contractor adds Lines

- ▶ Next, add all necessary lines to the bottom of the change order.
  - ▶ **Note:** Make sure to use the **Reference** option for deduct lines
- ▶ Enter Amount

The screenshot displays a web application interface for managing change orders. The main window is titled "Change Order - Expedited CO 1 - Project No. OCI-080001 - Go" and shows a "Line Item List" table with columns for "No.", "Reference", "WBS Code", and "Code Name". The "Add" button in the bottom left corner of this window is circled in red. A secondary window, titled "Line Item - Google Chrome", is overlaid on top, showing the "Change Order Line Item:" form. This form has a "General" tab and several input fields. The "Reference" field is set to "2" and is highlighted with a red box. The "WBS Code" is "CE-FC-03L". The "Code Name" is "Concrete Labr". The "Short Description" is "labor-concrete". The "Amount (\$)" field is set to "\$2,000.00" and is also highlighted with a red box. The "EDGE Certified Prime Contractor?" is "No". There are two "Subcontractor/Supplier" fields and an "EDGE Certified Sub?" field. A "Notes" field is empty. The form has "Attachments (0)" and "Linked Records (0)" sections. The background window also shows "Attachments (0)" and "Linked Records (0)" sections.

# Contractor adds Lines

- ▶ All deduct lines should have a **Reference** number
- ▶ All add lines should have a **0**

The screenshot displays the 'Change Order - Expedited CO 1 - Project No. OCI-080001' interface. The 'Line Item List' section shows a table with the following data:

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcont
003	0	CE-FC-13L	Specialties Labr	Special Labor	\$1,000.00	
002	4	CE-FC-03M	Concrete Matl	material-concrete	(\$4,000.00)	
001	2	CE-FC-03L	Concrete Labr	labor -concrete	(\$2,000.00)	

The 'Reference' column is highlighted with a red box, and a red arrow points to the value '0' in the first row. The 'Total Amount' is shown as (\$5,000.00).

# Contractor adds Lines

- ▶ Then select the workflow action “Tasks Completed” and the record will go to the PC for DocuSign
- ▶ Click send
- ▶ **Note:** Sending this change order will **NOT** lock the schedule of values

The screenshot displays the Oracle Primavera Change Order interface. The browser title is "Change Order - Expedited CO 1 - Project No. OCI-080001 - Google Chrome". The URL is [https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\\_id=1177712&parent\\_id=0&viewOnly=0&project\\_id=1003&\\_uref=uu](https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1177712&parent_id=0&viewOnly=0&project_id=1003&_uref=uu). The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". A "Send" button is circled in red. A "Workflow Actions" dropdown menu is also circled in red, with a red arrow pointing to it. The dropdown menu shows "Tasks Completed" selected. Below the menu, there are fields for "Change Order Cost and Time Impact", including "Current Completion Date", "Contract Days Changed This CO", "Revised Completion Date", "Total Amount (\$)", "Line Item Total (\$)", and "Difference (\$)". The "Action Details" section shows "Tasks Completed" with a "To..." field and "Send For: End". The "Line Item List" section shows a table with columns: No., Reference, WBS Code, Code Name, Short Description, Amount, and Subcont. The table contains 3 items. The "Total Amount" is (\$5,000.00). The interface also includes a footer with "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcont
1						
2						
3						

# PC Step

- ▶ When the PC receives the task in OAKS CI:
  - ▶ Ensure the Contractor has added the lines on the lower form
  - ▶ Create DocuSign document from custom print
  - ▶ Circulate change order via DocuSign

**Important Note: Once you Accept the task, do not Unaccept the task because it will erase the lines the contractor added to the form.**

The screenshot shows a web browser window titled "Change Order - Expedited CO 1 - Project No. OCI-080001 - Google Chrome". The URL is [https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\\_id=1177711&model=uco&project\\_id=1003&initiateBP=&bulkautoacc](https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1177711&model=uco&project_id=1003&initiateBP=&bulkautoacc). The page title is "Change Order". The "Print Preview" menu is open, showing options for "HTML ...", "PDF ...", and "Custom ...". A table of change order lines is visible, with three lines highlighted in red. A red arrow points to the "Print Preview" menu, and another red arrow points to the table.

Close Window	Code	Code Name	Short Description	Amount	Subcont
003	2	CE-FC-03L	Concrete Labr	labor-concrete	(\$2,000.00)
002	0	CE-FC-13L	Specialties Labr	Special Labor	\$1,000.00
001	4	CE-FC-03M	Concrete Matl	material-concrete	(\$4,000.00)

Total Amount: (\$5,000.00)

# PC Step

- ▶ Once the change order has been fully executed in DocuSign:
  - ▶ Upload fully executed DocuSign change order and attach to OAKS CI record
  - ▶ **Enter the Contracting Authority Date**
  - ▶ Choose Workflow Action “Tasks Completed” and click Send to end the record

Change Order - Expedited CO 1 - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\_id=1177711&model=uco&project\_id=1003&initiateBP=&bulkautoact...

File Edit View Actions Help

Send Save Spelling.. Add Attachment Discussion SOV Close Window

Workflow Actions: Tasks Completed (selected), Tasks Completed, Return for Clarification

**General** Change Order

Supervisor: Chief of: \_\_\_\_\_ Email: \_\_\_\_\_ CoP: \_\_\_\_\_

Manager: Date: \_\_\_\_\_ CoP Date: \_\_\_\_\_

Contracting Authority: \_\_\_\_\_ Select... Contracting Authority Date: 10/07/2016

Signature by: \_\_\_\_\_ Email: \_\_\_\_\_

**Action Details**

Tasks Completed (Click here to view latest content)

To: \_\_\_\_\_ Cc: \_\_\_\_\_ Send For: End

Task Notes: \_\_\_\_\_ Workflow Progress: \_\_\_\_\_

**Line Item List**

Current View: All Show Currency in: Transaction Currency

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

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcont
003	2	CE-FC-03L	Concrete Labr	labor-concrete	(\$2,000.00)	
002	0	CE-FC-13L	Specialties Labr	Special Labor	\$1,000.00	

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