



• Today • Tomorrow • Together •

Contractor Step--Proposal Request from the Associate

DISTRICT AND BUILDING LEVEL ACCESS

The screenshot shows the Primavera Unifier web interface. The browser address bar indicates the user is logged in as Shauna Hooks. The navigation tabs include Home, Company Workspace, Projects, and School Facilities. The 'School Facilities' tab is active, and a red arrow points to it. A red box highlights the text 'District and Building Level Project Access' in the center of the page. Below this, there is a table titled 'Tasks or New uMails:' with columns for Number, Name, Tasks, uMails, and Company Name. The table lists several projects with their respective task and uMail counts.

Number	Name	Tasks	uMails	Company Name
OCI-130101	School Facilities Training 1	28 Total, 24 New, 2 Late	3 New	Ohio School Facilities
OCI-130007	UAT 8 Rel 1 - Eaton	4 Total, 1 New, 3 Late		Ohio School Facilities
OCI-130006	UAT 7 Rel 1 - Deaf and Blind	1 Total, 1 New, 0 Late		Ohio School Facilities
OCI-130005	UAT 6 Rel 1 - Louisville	1 Total, 1 New, 0 Late		Ohio School Facilities
OCI-130003	UAT 2 Rel 1 - Dayton STEM	4 Total, 3 New, 0 Late		Ohio School Facilities
OCI-130002	UAT 5 Rel 1 - Toronto	4 Total, 4 New, 0 Late		Ohio School Facilities

BUILDING ACCESS

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

ORACLE Primavera Unifier Shauna Hooks (Last login: 10/08/2013 09:21 AM) Community Bookmarks Preferences Support Logout

Home Company Workspace Projects School Facilities

User Mode ▾

School Facilities - Home

School Facilities - Home View Dashboard My Dashboard ▾

File Edit View Help

Details

New Open Find View: Building Project ▾

Building Project - Current View: All

4 Item(s) Page 1 of 1 Display 100 items per page

Number	Name	Setup Date	Status
SFC-130322.02	Central Elementary	09/23/2013	Active
SFC-130315.17	Prairie Norton Elementary	09/20/2013	Active
SFC-120306.6	Napoleon Area City School District	09/19/2013	Active
SFC-???????.01	Brookfield K-12	09/25/2013	Active

Building Project View will allow you building Level Access

Clicking on the Building Project will take you to its home page



BUILDING PROJECT HOME PAGE

Click Collaboration to access the Task

Double Click on Task to Open

Type	Number	Title	Record Due	From	Sent for			
Contract Mod	SOV-2-010	Plumbing re work		Shauna Hooks	Proposal			
Contract	CON-003	CM-R ShookTouch		Shauna Hooks	School District C	08/13/2014		Best Value Selectio
Contract Mod	SOV-2-009	pr t		Rita Nichols,os	Funding Certific	05/23/2014		V2.1 - OFCC Propo
Contract Mod	SOV-2-006	CD2.1 T-R-1		Rita Nichols,os	Change Directiv	05/09/2014		V2.1 - OFCC Chan
Contract Mod	SOV-1-003	A&A Architecture		Kaylie Ruff,osf	PM Review	05/09/2014		V2.1 - OFCC Propo
Contract Mod	SOV-1-002	Subcontractor Bu		Kaylie Ruff,osf	PM Review	05/09/2014		V2.1 - OFCC Reque
Contract Mod	SOV-2-005	Turner Constructi		Kaylie Ruff,osf	Change Directiv	05/09/2014		V2.1 - OFCC Chang
Contract Sch	SOV-3	SOV		Kaylie Ruff,osf	Vendor Approva	05/09/2014		Contracts SOV Im
Contract Mod	SOV-2-004	RCO Mystery		Steve Mayo,os	PM Review	04/04/2014		V2.0 - OFCC Reque
Contract Mod	SOV-2-003	CO Test Cons		Rita Nichols,os	PM Review	03/31/2014		V2.0 - OFCC Reque
Schedule Ap	SA-001	Schedule Approva		Shauna Hooks	AE Review	01/31/2014		CM-R or DB Sched
Submittals	SUB-0017	Cabinet Hardware		Shauna Hooks	Distribution	01/09/2014		Imported CM-R Init
Submittals	SUB-0016	Door Hardware 5		Shauna Hooks	Distribution	01/09/2014		Imported CM-R Init
Submittals	SUB-0015	Cabinet Hardware		Shauna Hooks	Distribution	01/09/2014		Imported CM-R Init
Submittals	SUB-0014	Door Hardware 4		Shauna Hooks	Distribution	01/09/2014		Imported CM-R Init
Submittals	SUB-0010	Door Hardware 3		Shauna Hooks	Fulfillment	01/09/2014		Imported CM-R Init
Submittals	SUB-0011	Cabinet Hardware		Shauna Hooks	Fulfillment	01/09/2014		Imported CM-R Init
Submittals	SUB-0012	Door Locks 3		Shauna Hooks	Fulfillment	01/09/2014		Imported CM-R Init
Submittals	SUB-0013	Garage Threshhol		Shauna Hooks	Fulfillment	01/09/2014		Imported CM-R Init

COMPLETE THE PROPOSAL CREATION STEP

Open the record and Accept the Task.

Review Attachments and Comments.

General Block:

- Enter Title
- Enter the proposed change order amount ,
- Enter Contract Days Changed (if applicable)

Contract Modification - Plumbing re work - Project No. SFC-130322.02 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification

Organization Name: _____ Creation Date: 09/10/2014 03:08 PM Local (GMT-5)

Facility Name: _____

Title: Plumbing re work

Contract Reference: 002

Change Order Type: Proposal Request

Change Order No.: 1

Change Order Cost and Time Impact

Current Completion Date: _____	Total Amount (\$): 0.00 *
Contract Days Changed: 0	Line Item Total (\$): 0.00
Revised Completion Date: _____	Difference (\$): 0.00

Basis of Change Order

Change Order Basis: Error/Omission Other Description: _____

Notes

Notes: _____

Action Details

Line Item List

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

Scroll down page



COMPLETE THE PROPOSAL CREATION STEP

To enter the cost proposal amounts:

- Click Add
- Note: If you are taking money away (deducting) from the contract, this proposal will **LOCK** the contract SOV and no application for payment can be created until this change order is approved or withdrawn.

Change Order - test - Project No. OCI-080001 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

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

General Change Order

General

Organization: Department of Administrative Services Record Number: CO-0002

Project Number: OCI-080001 Creator: Shauna Hooks

Project Name: Agency General Projects Test Creation Date: 02/04/2011 09:27 AM Local (GMT-5)

Project Location: OAKS CI Administration Status: Pending

Action Details

(Click here to view latest content)

To... Cc... Send For:

Task Notes:

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
-----	-----------	----------	-----------	-------------------	--------

Add Copy Import Remove Grid Find Total Amount: \$ 0.00

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



ADD LINE ITEMS

Secondary screen will open

- Click the Select Button next to WBS code.
OR
- Click Select next to Reference
ONLY If you are taking money away
(deducting) from a current line in your
Contract SOV

The screenshot shows a web browser window titled "Line Item - Windows Internet Explorer". The browser's address bar shows "Spelling...", "Attach", and "Delete Line Item". The main content area is titled "Change Order Line Item:" and contains a "General" section. This section includes several input fields and buttons: "Reference:" with a "Select..." button; "WBS Code:" with a "Select..." button (highlighted with a red box and a black arrow pointing to it); "Code Name:"; "Short Description:" (highlighted with a red box); "EDGE Certified Prime Contractor?: Yes"; "Amount (\$):" (highlighted with a red box); "Subcontractor/Supplier:" with a "Select..." button; another "Subcontractor/Supplier:" field; and "EDGE Certified Sub?". Below these fields is a "Notes:" text area. At the bottom of the window, there is an "Attachments (0)" section and "OK" and "Cancel" buttons.

HOW TO SELECT WBS CODE

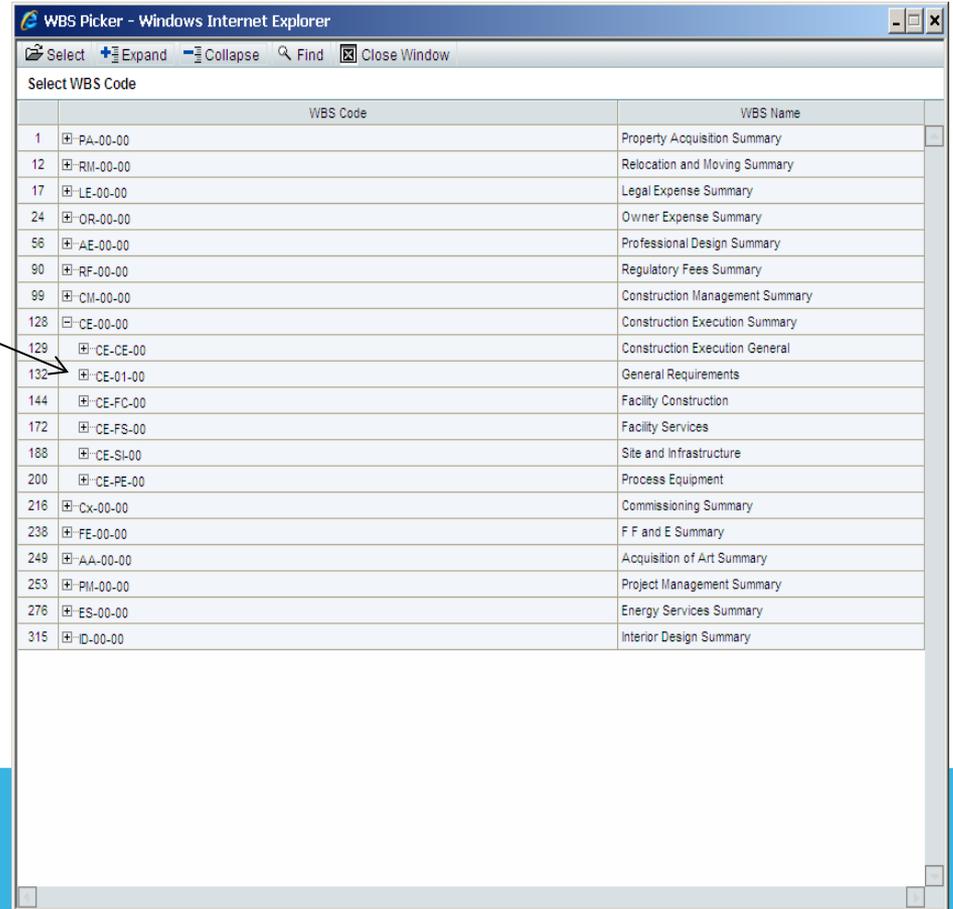
Click the collapse button to minimize the line item list

Click the (+) symbol next to line 128

	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
56	AE-00-00	Professional Design Summary
90	RF-00-00	Regulatory Fees Summary
99	CM-00-00	Construction Management Summary
128	CE-00-00	Construction Execution Summary
216	Cx-00-00	Commissioning Summary
238	FE-00-00	F F and E Summary
249	AA-00-00	Acquisition of Art Summary
253	PM-00-00	Project Management Summary
276	ES-00-00	Energy Services Summary
315	D-00-00	Interior Design Summary

SELECT WBS CODE

Click the plus (+) symbol next to the line that corresponds with the line item you wish to add



WBS Picker - Windows Internet Explorer

Select WBS Code

	WBS Code	WBS Name
1	<input type="checkbox"/> PA-00-00	Property Acquisition Summary
12	<input type="checkbox"/> RM-00-00	Relocation and Moving Summary
17	<input type="checkbox"/> LE-00-00	Legal Expense Summary
24	<input type="checkbox"/> OR-00-00	Owner Expense Summary
56	<input type="checkbox"/> AE-00-00	Professional Design Summary
90	<input type="checkbox"/> RF-00-00	Regulatory Fees Summary
99	<input type="checkbox"/> CM-00-00	Construction Management Summary
128	<input type="checkbox"/> CE-00-00	Construction Execution Summary
129	<input type="checkbox"/> CE-CE-00	Construction Execution General
132	<input checked="" type="checkbox"/> CE-01-00	General Requirements
144	<input type="checkbox"/> CE-FC-00	Facility Construction
172	<input type="checkbox"/> CE-FS-00	Facility Services
188	<input type="checkbox"/> CE-SI-00	Site and Infrastructure
200	<input type="checkbox"/> CE-PE-00	Process Equipment
216	<input type="checkbox"/> Cx-00-00	Commissioning Summary
238	<input type="checkbox"/> FE-00-00	F F and E Summary
249	<input type="checkbox"/> AA-00-00	Acquisition of Art Summary
253	<input type="checkbox"/> PM-00-00	Project Management Summary
276	<input type="checkbox"/> ES-00-00	Energy Services Summary
315	<input type="checkbox"/> ID-00-00	Interior Design Summary

SELECT WBS CODE

The field will expand.

Choose the specific line item.

Click Select

	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
56	AE-00-00	Professional Design Summary
90	RF-00-00	Regulatory Fees Summary
99	CM-00-00	Construction Management Summary
128	CE-00-00	Construction Execution Summary
129	CE-CE-00	Construction Execution General
132	CE-01-00	General Requirements
144	CE-FC-00	Facility Construction
145	CE-FC-BE	Facility Construction Budget
146	CE-FC-02L	Existing Conditions Labr
147	CE-FC-02M	Existing Conditions Matl
148	CE-FC-03L	Concrete Labr
149	CE-FC-03M	Concrete Matl
150	CE-FC-04L	Masonry Labr
151	CE-FC-04M	Masonry Matl
152	CE-FC-05L	Metals Labr
153	CE-FC-05M	Metals Matl
154	CE-FC-06L	Wood Plastic and Composite Labr
155	CE-FC-06M	Wood Plastic and Composite Matl
156	CE-FC-07L	Thermal and Moisture Protn Labr
157	CE-FC-07M	Thermal and Moisture Protn Matl
158	CE-FC-08L	Openings Labr
159	CE-FC-08M	Openings Matl
160	CE-FC-09L	Finishes Labr
161	CE-FC-09M	Finishes Matl
162	CE-FC-10L	Specialties Labr



SELECT WBS CODE

Complete highlighted boxes

If an **EDGE certified** subcontractor or supplier will be utilized for this part of the change order, select and plug them into the line item

Once line item is complete, click OK.

Line Item - Windows Internet Explorer

Spelling... Attach Delete Line Item

Change Order Line Item:

General

Reference: Select...

WBS Code: CE-FC-03M Select... *

Code Name: Concrete Matl

Short Description: *

EDGE Certified Prime Contractor?: No

Amount (\$): *

Subcontractor/Supplier: Select...

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

Attachments (0) [Linked Records \(0\)](#)

OK Cancel

CONTINUE ADDING LINE ITEMS

Note: We have Referenced the SOV line number from which money is being removed (deducted) from.

Contract Modification - Plumbing re work - Project No. SFC-130322.02 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

Contract Modification

General

Action Details

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/Su
002	0	CE-A-31L	CE Substructure Earthwork	ADDTL Earth Work	500.00	12	
001	8	CE-B2020-08L	CE Exterior Windows Labr	CE Exterior Windows Labr	-500.00	12	

Add Copy Import Remove Grid Find Total Amount: \$ 0.00

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



CONTINUE ADDING LINE ITEMS

Line item information appears in the Line Item List block and in the General block(UPPER FORM).

Difference should equal 0.00 when all line items are entered.

Repeat this process to enter all of the detailed cost line items.

The screenshot displays a web application window titled "Change Order - test - Project No. OCI-080001 - Windows Internet Explorer". The interface is divided into several sections:

- General:** Contains fields for Contract Reference (OCI-090002-002), Contractor Name (OCI Test General), Change Order Type (Proposal Request), Change Order No., Fee Title (SAO Standard Fee 1), EDGE Certified Prime? (No), Total Amount (\$), Line Item Total (\$), and Difference (\$). A red arrow points to the Difference (\$) field, which is set to 0.00.
- Action Details:** Includes a link to view latest content, a "To:" field, a "Cc:" field, and a "Send For:" field.
- Line Item List:** Shows a table with one item. The table has columns for No., Reference, WBS Code, Code Name, Short Description, and Amount.

No.	Reference	WBS Code	Code Name	Short Description	Amount
001	0	CE-FC-03M	Concrete Matl	Concrete	100.00

At the bottom of the window, there are navigation buttons (Add, Copy, Import, Remove, Grid, Find) and a "Total Amount: \$ 100.00" display. The footer of the application shows "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".



COMPLETE THE PROPOSAL CREATION STEP

You must attach any supporting documentation, by first uploading it into document manager and attaching to the record. If you are unsure how to upload into document manager please see page of this packet.

The screenshot shows a web browser window displaying a 'Change Order' form for Project No. OCI-080001. The form includes sections for 'General' (with fields for recommendations, approval, and contractor concurrence), 'Change Order Cost and Time Impact' (with completion dates and funds), and 'Notes'. A 'Select Files' dialog box is overlaid on the right, showing a file tree with folders like '0000 Concept Dev', '0100 Acquisition', '0200 Design', and '0300 Construction'. A file named 'DAS FIN Training - Certific...' is selected. The dialog has 'OK' and 'Cancel' buttons, with an arrow pointing to the 'OK' button.

Ref	BP	Name	Size	Upload Date	Owner	Title
		0310 Pre-Construction Me			Steve Mayo	
		0315 RFI			Steve Mayo	
		0320 Partnering			Steve Mayo	
		0325 Field Reports			Steve Mayo	
		0330 Progress Meetings			Steve Mayo	
		0340 Progress Schedules			Steve Mayo	
		0350 Contract Modification			Steve Mayo	
		0360 Claims			Steve Mayo	
		0370 Close Out			Steve Mayo	
		0375 Record Documents			Steve Mayo	
		0380 Warranty			Steve Mayo	
		0390 Pictures			Steve Mayo	
		0399 Miscellaneous			Steve Mayo	
		DAS FIN Training - Certific	63 KB	05/29/2009	Becky Bessell	



COMPLETE THE PROPOSAL

Once you have completed your Proposal, Select Submit and Click Send

Contract Modification - Plumbing re work - Project No. SFC-130322.02 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Submit

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification

Action Details

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/Su
002	0	CE-A-31L	CE Substructure Earthwork	ADDTL Earth Work	500.00	12	
001	8	CE-B2020-08L	CE Exterior Windows Labr	CE Exterior Windows Labr	-500.00	12	

Add Copy Import Remove Grid Find Total Amount: \$ 0.00

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

