



# **Proposal Request**

## Agency/Higher Ed



# 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](https://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 displays the Oracle Primavera Unifier (Development) interface. The user is logged in as Katie Tuttle. The breadcrumb trail shows the path: School Facilities > OAKS CI District T... > Oak Hills Local B... The left-hand navigation menu is open, and the 'Logs' option is circled in red. A red arrow points from the 'Logs' option to the 'Contract Modification K12' option in the menu. The main content area shows a 'Contract Mod' dropdown menu with the 'Create' button circled in red. A red arrow points from the 'Create' button to the 'Proposal Request v3.0' option in the dropdown menu. Below the dropdown menu, a table of contract modifications is visible, with a red arrow pointing to the 'CO-0002' row.

CO No.			
1			
CO-0002			
CO-0001			
GMP1			
GMP1	GMP Amendment	Joe General Cont...	072
CO-12	Proposal Request	Joe General Cont...	072
12345	Proposal Request	Joe General Cont...	072
CO-02	GMP Subcontract ...	Joe General Cont...	072
CO-001	GMP Subcontract ...	Joe General Cont...	072



# 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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucmk/1086/3120?\_uref=uuu47229...

### Create New Contract Modification K12

General Line Item List

**General**

Project Number  
SFC-080001.01

Project Name  
Oak Hills Local Building Project

Organization Name

Facility Name

Title \*  
Proposal Request 001a

Contract Reference \*  
71220-1

Change Order Type  
Proposal Request

Change Order No. \*  
00124

Joe General Contractor

Trade  
CM at Risk

EDGE Certified Prime?  
Yes

Information  
No Attachments.

Title	Contractor Name	Contract No.	Revised Completior Date
K-12 Archana test SOV	Joe General Contractor	71220-1	
71220-1- test	Joe General Contractor	71220-1	
Test Pre-con SOV	Joe General Contractor	072215	
Jill's Contracting	Joe General Contractor	072215	
Joe Contractor SOV	Joe General Contractor	072215	
Katie's Contracting	Joe General Contractor	072215	
Test 2 SOV	Joe General Contractor	072215	
Test SOV	Joe General Contractor	072215	

Total: 8

Cancel Select



# Change Order Details

- ▶ Scroll down to the **Change Order Details** section
- ▶ Fill out the **Description of Work** and **Justification** fields

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucmk/1086/3120?\_\_uref=uuu472297501t5

## Create New Contract Modification K12

Send Save

General Line Item List

Change Order Type: Proposal Request

Change Order No. \*: 00124

Trade: CM at Risk

EDGE Certified Prime?: Yes

**Change Order Details**

Description of Work \*: This is the work that will be completed

Justification \*: This is the reason the work must be completed

Attachments: No Attachments.



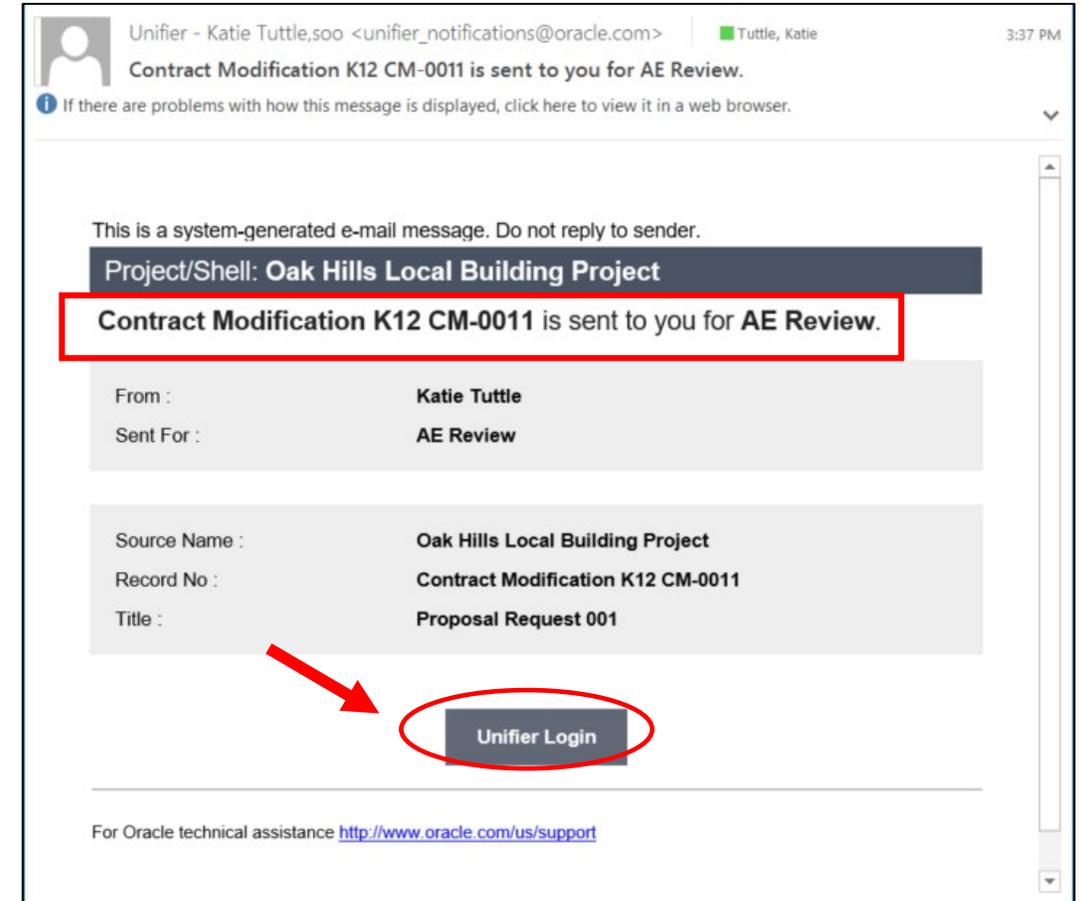
# Send the Record

- ▶ When the record is ready to move forward, click the **Send** button at the top of the record
- ▶ Verify Workflow Action: **Submit**
- ▶ Click **Send**

The image displays two screenshots from a web application. The top screenshot shows the 'Create New Contract Modification K12' page. The 'Send' button is circled in red, and a red arrow points to it. The bottom screenshot shows the 'Workflow Action Details' dialog. The 'Submit' option is selected in the 'Workflow Actions' dropdown, circled in red. The 'Send' button at the bottom right of the dialog is also circled in red, with a red arrow pointing to it. The dialog also shows the 'To' field with 'Matthew Weber' and the 'Send For' field with 'Proposal Creation'.

# 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** to begin work on the record

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/open/ucmk/25/0/0?srcid=25&model=ucmk&fromcostlog...&project\_id=1086&nfl=0&\_u...

## Contract Modification K12

General Line Item List

**Task Details**

From  
Matthew Weber

To  
Archana Atrey;Jordan Zamary;Lance Witcher;Matthew Weber;Purna Irukulapati;Rita Nichols;Shauna Hoo...

Sent For  
AE Review

**General**

Project Number SFC-080001.01	Record Number CM-0017
Project Name Oak Hills Local Building Project	Creator Matthew Weber
Organization Name	Creation Date 10/13/2020 02:19 AM (UTC-8)
Facility Name	Status Pending
Title Proposal Request 001a	

Attachments Comments Links

Information  
No Attachments.



# A/E Review

- ▶ Review the information in the **General** tab

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217777/undefined/undefined?\_\_uref=uuu47229750115

### Contract Modification K12

Send Save

**General** Line Item List

**General**

Project Number SFC-080001.01	Record Number CM-0017
Project Name Oak Hills Local Building Project	Creator Matthew Weber
Organization Name	Creation Date 10/13/2020 02:19 AM (UTC-8)
Facility Name	Status Pending
Title * Proposal Request 001a	
Contract Reference 71220-1	Contractor Name Joe General Contractor
Change Order Type Proposal Request	Trade CM at Risk
Change Order No. * 00124	EDGE Certified Prime? Yes

**Change Order Details**

Description of Work \*  
This is the work that will be completed

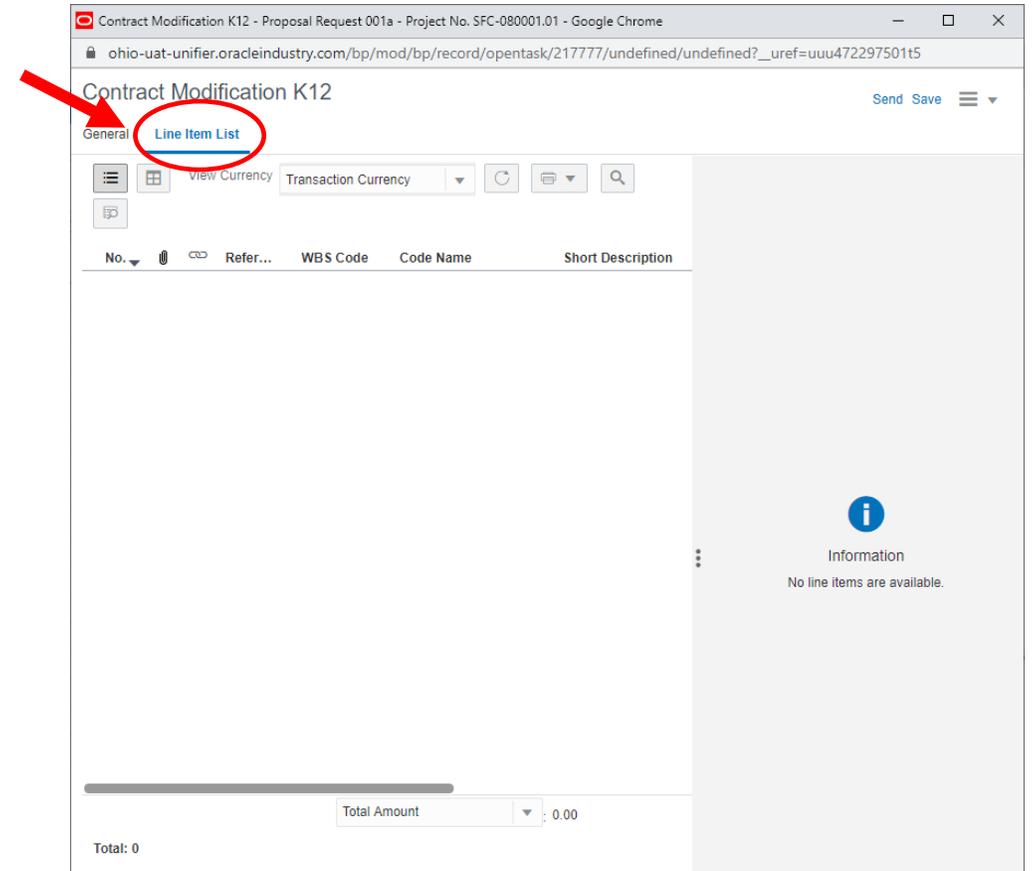
Justification \*  
This is the reason the work must be completed

**Attachments**  
No Attachments.



# A/E Review

- ▶ Click the **Line Item List** tab to review



# Send the Record

- ▶ Once the review is complete click **Send** at the top of the record
- ▶ Choose Workflow Action:
  - ▶ **Accept:** send the record to the PM for review
  - ▶ **Return for Clarification:** return to the Contractor for changes if necessary
- ▶ Click **Send**

The image consists of three overlapping screenshots of a web application interface, illustrating the steps to send a record.

The top screenshot shows the main record page for "Contract Modification K12". At the top right, there are buttons for "Send" and "Save". A red circle highlights the "Send" button, with a red arrow pointing to it.

The middle screenshot shows a "Workflow Action Details" dialog box. The "Workflow Actions" dropdown menu is open, showing options: "Select", "Accept", and "Return for Clarification". A red box highlights the "Accept" option, with a red arrow pointing to it.

The bottom screenshot shows the "Workflow Action Details" dialog box with "Accept" selected. The "Send For" field is populated with "PM Review". The "To" field contains a list of names: "Archana Atrey, Jordan Zamary, Lance Witcher, Matthew Weber, Purna Irukulapati, Rita Nichols, Sha...". The "CC" field is empty. At the bottom right, there are "Cancel" and "Send" buttons. A red circle highlights the "Send" button, with a red arrow pointing to it.



# Questions?

Please contact OAKS CI Support Desk:

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614.644.2211

