



Proposal Request

K12



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.
- ▶ OFCC PM or PC must specify one PC user and one Contractor user that will act on this record.
- ▶ The record will go the PC and Contractor simultaneously. **The Contractor MUST act first.**
- ▶ Use caution before returning the record for clarification.

- ▶ **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

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier (Development)', and user information 'Katie Tuttle'. The breadcrumb trail shows 'Agency > OAKS CI Training > OAKS CI Training 4'. The left sidebar contains a navigation menu with 'Change Order' highlighted. A dropdown menu is open over the 'Change Order' menu item, listing various workflow options. The 'Expedited Deduct Change Order' option is highlighted with a red box and a red arrow. The main content area shows a table of Change Orders with columns for 'CO No.', 'Title', and 'Status'. The table contains 22 rows of data, with the total count displayed as 'Total: 22'.

CO No.	Title	Status
002	Agency Change Directive	Approved
001	Agency Proposal Request	Terminated
12345	Agency Request for CO	Approved
1	Contingency Consumption	Terminated
2	GMP Amendment v3.0	Approved
PR-001	GMP Subcontract Distribution	Terminated
1	OFCC Change Directive 3.0	Terminated
PR-001	OFCC GMP Amendment	Terminated
PR-001	OFCC Proposal Request v3.0	Terminated
PR-001	Request for Change Order v3.0	Terminated
001	SAO Field Work Order	Terminated
00009	V2 - OFCC Change Directive	Terminated
PR-001	Zero Dollar Change Order	Terminated



A/E Creates Record

- ▶ A/E will complete the **General** tab including:
 - ▶ **Title, Contract Reference, Change Order Type, Change Order Number**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uco/1006/3643?__uref=uuu365558775t2

Create New Change Order Send Save

General Line Item List

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 Matthew Weber
Project Name OAKS CI Training 1	Creation Date
Project Location Surface Road	Status
Title * dps-080004-01-01	Trade General Contractor
Contract Reference * DRC-12001	Contractor Name Sands Decker Ltd.
Change Order Type * Proposal Request	EDGE Certified Prime? No
Change Order No. * 00124	Fee Title SAO Standard Fee 1

Attachments Comments

Information
No Attachments.



A/E Creates Record

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

00124 SAO Standard Fee 1

Change Order Details

Description of Work *

This is the work to be completed

Justification *

Owner Change

Current Completion Date Total Amount (\$)

Attachments C >

Information
No Attachments.



A/E Creates Record

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

The screenshot shows a web browser window titled "Create New Change Order - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uco/1006/3643?__uref=uuu365558775t2". The page title is "Create New Change Order". There are tabs for "General" and "Line Item List".

Key fields and values:

- Contract Days Changed This CO: 0
- Line Item Total (\$): 0.00
- Revised Completion Date: 03/06/2013 09:00 AM (UTC-8)
- Difference (\$): 0.00

The "Change Order Basis" field is a dropdown menu with the following options:

- Select
- CMR/DB Contingency Transfer
- Error/Omission
- Owner Request
- Value Engineering
- Differing Site Conditions
- Field Resolution
- Other
- Return of Savings to Owner

The "Other Description" field is empty. The "Attachments" section shows "No Attachments".



A/E Sends Record

- ▶ When the record is ready to move forward, click **Send**
- ▶ Verify Workflow Action:
Expedite Change Order
 - ▶ In Action Details the “To” box will populate with recipients
- ▶ Click **Send**

The screenshot shows the 'Create New Change Order' workflow action details dialog box. The 'Workflow Actions' dropdown is set to 'Expedite Change Order'. The 'To' field is populated with a list of recipients including Archana Atrey, Brett Gundlach, Cindy Pizzuto, Matthew Weber, Moenique Morris, and Purna Irukulapati. The 'CC' field contains a grid of 18 'Consultant Student' entries. The 'Send' button at the bottom right is circled in red.



Task Status

- ▶ The task now sits with both the Project Coordinator and the Contractor users.
- ▶ **The Contractor user must act first by adding lines to the change order.**

Workflow Progress - Google Chrome

Secure | https://ohio-unifier.oracleindustry.com/bp/studio/workflow/show/progress?processId=151556&selected_node_id=1039247

Workflow Progress
Title: test Record No.: CO-0023 BP Setup used: Expedited Deduct ...

Filter By: All Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Katie Tuttle	State of Ohio	Completed	Expedite Change Order	06/19/2017 03:...
Proposal Creation and DocuSign Wait	Rita Nichols	State of Ohio	View Only		
Proposal Creation and DocuSign Wait	Shauna Hooks	State of Ohio	View Only		
Proposal Creation and DocuSign Wait	VAMSHIDHAR RACHAKON	State of Ohio	Not Started		
Proposal Creation and DocuSign Wait	Katie Tuttle	State of Ohio	Not Started		
Proposal Creation and DocuSign Wait	Brett Gundlach	State of Ohio	View Only		
Proposal Creation and DocuSign Wait	Steve Mayo	State of Ohio	View Only		
Proposal Creation and DocuSign Wait	Sara Freetage	State of Ohio	View Only		
Update					
End					

Flowchart:

```
graph TD; A[Expedite Change Order] --> B[Proposal Creation and DocuSign]; B --> C[Update]; C -- Resubmit --> B; C -- Return for Clarification --> B; B --> D[Tasks Completed];
```

Print Graphic Close



Contractor Enters Amount

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

Change Order - dps-080004-01-01 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217786/undefined/undefined?_uref=uuu365558775t2

Change Order

Send Save

Attachments Comments

General

Organization Department of Administrative Services	Record Number CO-0067
Project Number OCI-080001	Creator Matthew Weber
Project Name OAKS CI Training 1	Creation Date 10/13/2020 04:46 AM (UTC-8)
Project Location Surface Road	Status Pending
Title * dps-080004-01-01	Trade Plumbing
Contract Reference OCI-080001-03	Contractor Name OAKS Plumbing
Change Order Type Proposal Request	EDGE Certified Prime? Yes
Change Order No. 00124	Fee Title SAO Standard Fee 1

Change Order Details

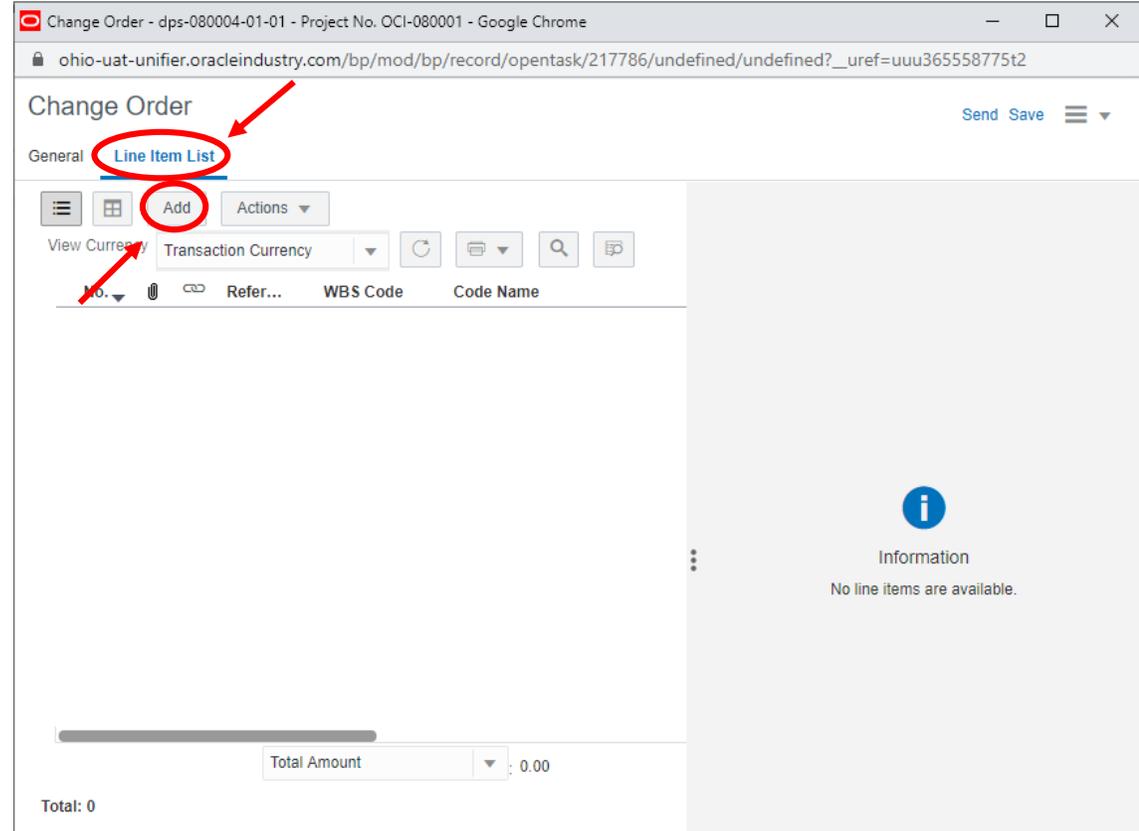
Current Completion Date MM/DD/YYYY HH:MM AM	Total Amount (\$) -5,000.00
Contract Days Changed This CO 30	Line Item Total (\$) 0.00
Revised Completion Date	Difference (\$) -5,000.00

Information
No Attachments.



Contractor Adds Lines

- ▶ Next, add all necessary lines to the change order
- ▶ Open the **Line Item List** tab
- ▶ Click **Add**



The screenshot displays the Oracle Change Order interface in a web browser. The browser title is "Change Order - dps-080004-01-01 - Project No. OCI-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217786/undefined/undefined?_uref=uuu365558775t2". The page title is "Change Order". The "General" tab is selected, and the "Line Item List" sub-tab is active. The "Add" button is circled in red, and a red arrow points to it. Another red arrow points to the "Line Item List" tab. The interface includes a "Send Save" button, a "View Currency" dropdown, and a "Transaction Currency" dropdown. The main content area is empty, and a message box on the right states "Information: No line items are available." The bottom of the page shows a "Total Amount" of 0.00 and a "Total: 0" label.

Contractor Adds Lines

- ▶ **Note:** Make sure to use the **Reference** option for deduct lines
- ▶ Enter **Amount**
- ▶ Click **Save** or **Save & Add New**

Change Order - dps-080004-01-01 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217786/undefined/undefined?_uref=uuu365558775t2

Change Order

Send Save

General **Line Item List**

Add Actions

View Currency Transaction Currency

No.	Refer...	WBS Code	Code Name
-----	----------	----------	-----------

Line Item Details

General

Reference: 4

WBS Code: CE-FS-22M

Code Name: Plumbing Matl

Short Description: Plumbing Matl

Amount (\$): -2,000.00

EDGE Certified Prime Contractor? Yes

Subcontractor/Supplier: Type a Subcontractor/Supplier...

Subcontractor/Supplier:

EDGE Certified? :

Total Amount: 0.00

Total: 0

Cancel Save Save & Add New



Contractor Adds Lines

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

The screenshot shows a web application interface for a Change Order. The main table lists line items with columns for No., Refer..., WBS Code, Short Description, Amount, and Code Name. The 'Refer...' column for line 003 is highlighted with a red box and contains the value '0'. The 'Amount' for line 003 is 1,000.00. The total amount for the change order is -5,000.00.

No.	Refer...	WBS Code	Short Description	Amount	Code Name
003	0	CE-FS-23L	Additional Unit	1,000.00	Heating Ventilating e
002	3	CE-FS-22L	Plumbing Labr	-4,000.00	Plumbing Labr
001	4	CE-FS-22M	Plumbing Matl	-2,000.00	Plumbing Matl

Line Item Details Panel (General):

- Reference: Type a Reference ...
- WBS Code: Type CBS Code or ...
- Code Name: [Empty]
- Short Description: [Empty]
- Amount (\$): 0.00
- EDGE Certified Prime Contractor? Yes
- Subcontractor/Supplier: Type a Subcontract...
- Subcontractor/Supplier: [Empty]
- EDGE Certified?: [Empty]

Total: 3 Total Amount: -5,000.00



Contractor Adds Lines

- ▶ Once complete, click **Send** at the top of the record

Change Order - dps-080004-01-01 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217786/undefined/undefined?_uref=uuu365558775t2

Change Order

General Line Item List

EXPEDITED DEDUCT CHANGE ORDER - Contractor Instructions: This work flow allows deduct line items without locking the schedule of values. Complete the upper and lower form as you would for any proposal request. Attach all required and optional backup documents. Take the workflow action 'Tasks Completed'. The Coordinator will then be able to route this change order for DocuSign signature.

EXPEDITED DEDUCT CHANGE ORDER - Coordinator Instructions: Wait until the contractor completes the lower form. Make a custom print and route in DocuSign for approvals. DO NOT ADVANCE THE RECORD. When the DocuSign approval process is complete, enter the contracting authority date, upload the signed document and take the workflow action 'Task Completed'. This will immediately approve the change order.

General

Organization	Record Number
Department of Administrative Services	CO-0067
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
OAKS CI Training 1	10/13/2020 04:46 AM (UTC-8)
Project Location	Status
Surface Road	Pending

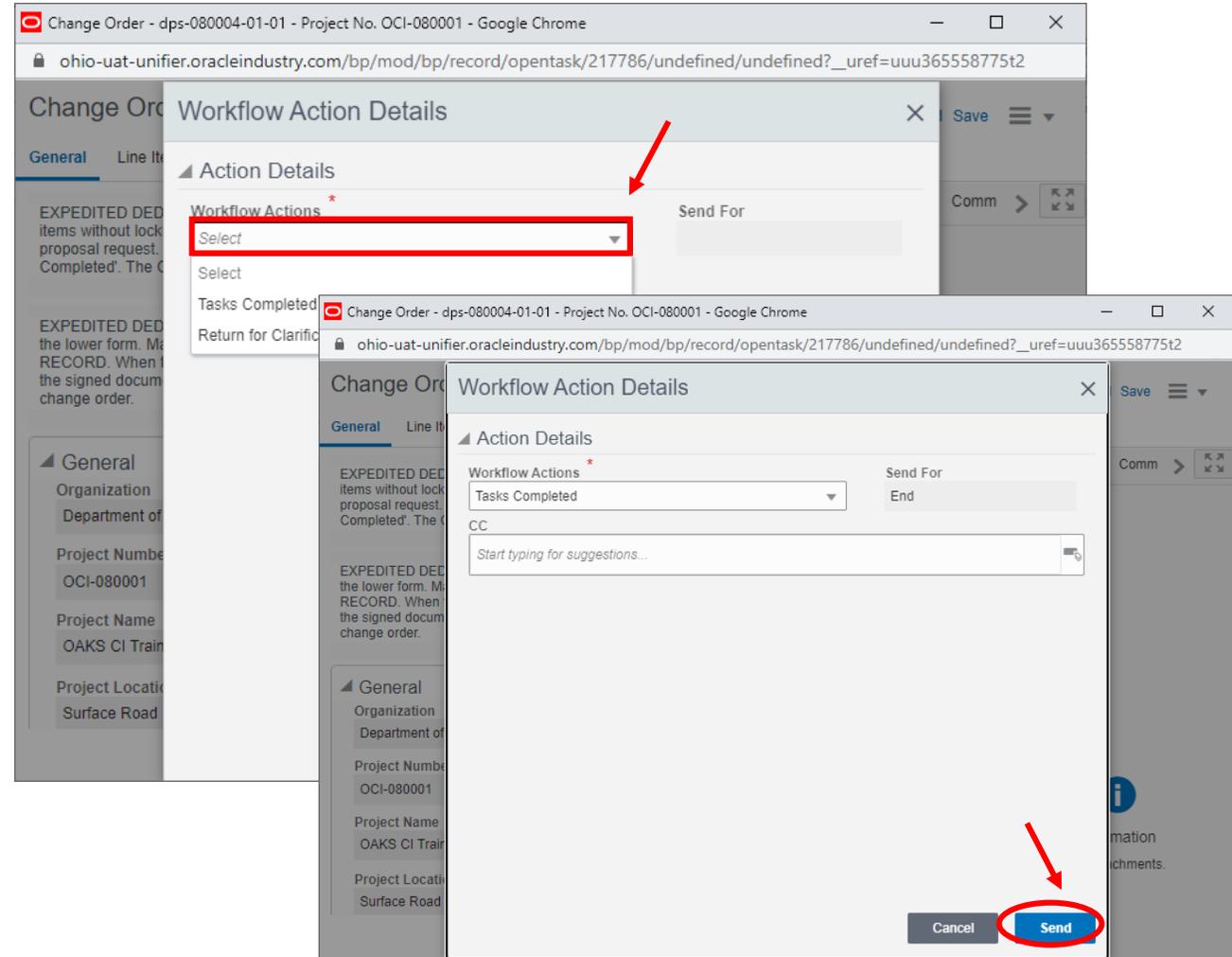
Attachments Comm >

No Attachments.



Contractor Adds Lines

- ▶ 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



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 the Oracle OAKS CI 'Change Order' interface. The browser title is 'Change Order - dps-080004-01-01 - Project No. OCI-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217786/undefined/undefined?_uref=uuu365558775t2'. The page title is 'Change Order'. The 'General' tab is selected, and the 'Line Item List' sub-tab is active. The interface includes a toolbar with 'Add', 'Actions', and 'View Currency' options. A table displays the line items:

No.	Refer...	WBS Code	Short Description	Amount
003	0	CE-FS-23L	Additional Unit	
002	3	CE-FS-22L	Plumbing Labr	-4,000.00
001	4	CE-FS-22M	Plumbing Matl	-2,000.00

The 'Total Amount' is displayed as -5,000.00. A dropdown menu is open, showing options: SOV, Export Line Item Template, Print (highlighted), Reload, Review, Terminate Record, Transfer Ownership..., Undo Accept Task, Help, and Close. The 'Print' option is highlighted with a red box, and the 'Custom ...' option is also highlighted with a red box. A red arrow points to the menu icon in the top right corner. The 'Amount (\$)' field is set to 1,000.00. The 'EDGE Certified Prime Contractor?' checkbox is checked. The 'Cancel' and 'Save' buttons are visible at the bottom right.



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**
 - ▶ Click **Send**

Change Order - dps-080004-01-01 - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217786/undefined/undefined?_ufef=uuu365558775t2

Change Order

General Line Item List

PM Supervisor	PM Supervisor Email	Program Manager Date MM/DD/YYYY
Chief of Projects	CoP Email	CoP Date MM/DD/YYYY
Contracting Authority Signature by Type a Last ...	Contracting Authority Email	Contracting Authority Date 10/13/2020

Publish Path

Attachments Comment

Unpublished Attachments

DocuSign Example

Total: 1

Send Save

Contractor Adds Lines

- ▶ Select the Workflow Action **Tasks Completed** and the record will go to the **PC for DocuSign**
- ▶ Click **Send** to end the record

The image displays two screenshots of a web application interface, specifically the 'Workflow Action Details' dialog box. The top screenshot shows the 'Workflow Actions' dropdown menu with 'Select' highlighted. A red arrow points to the dropdown menu. The bottom screenshot shows the 'Workflow Actions' dropdown menu with 'Tasks Completed' selected. A red arrow points to the 'Send' button at the bottom right of the dialog box.

Questions?

Please contact OAKS CI Support Desk:

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