



# Cost Proposal Creation

K-12 Cloud

# 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](http://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>

# \*Note on Deduct Change Orders

- ▶ If you are taking money away (deducting) from the contract, this proposal will **LOCK** the Contract Schedule of Values (SOV) and no Applications for Payment can be created until this Change Order is Approved or Withdrawn
  - ▶ **A new workflow- The Expedited Deduct Change Order can be activated for your project and can help you avoid locking the SOV. Please contact your OFCC project manager to enable this.**
- ▶ Also, if you have an Application for Payment in your drafts it can be corrupted when a deduct Change Order is created.
  - ▶ The fix for this is to create your Application for Payment and send it forward to the A/E, then have the A/E return it to you for clarification. This changes the status of your Application for Payment record and keeps the Change Order from corrupting it.

# Purpose and Process

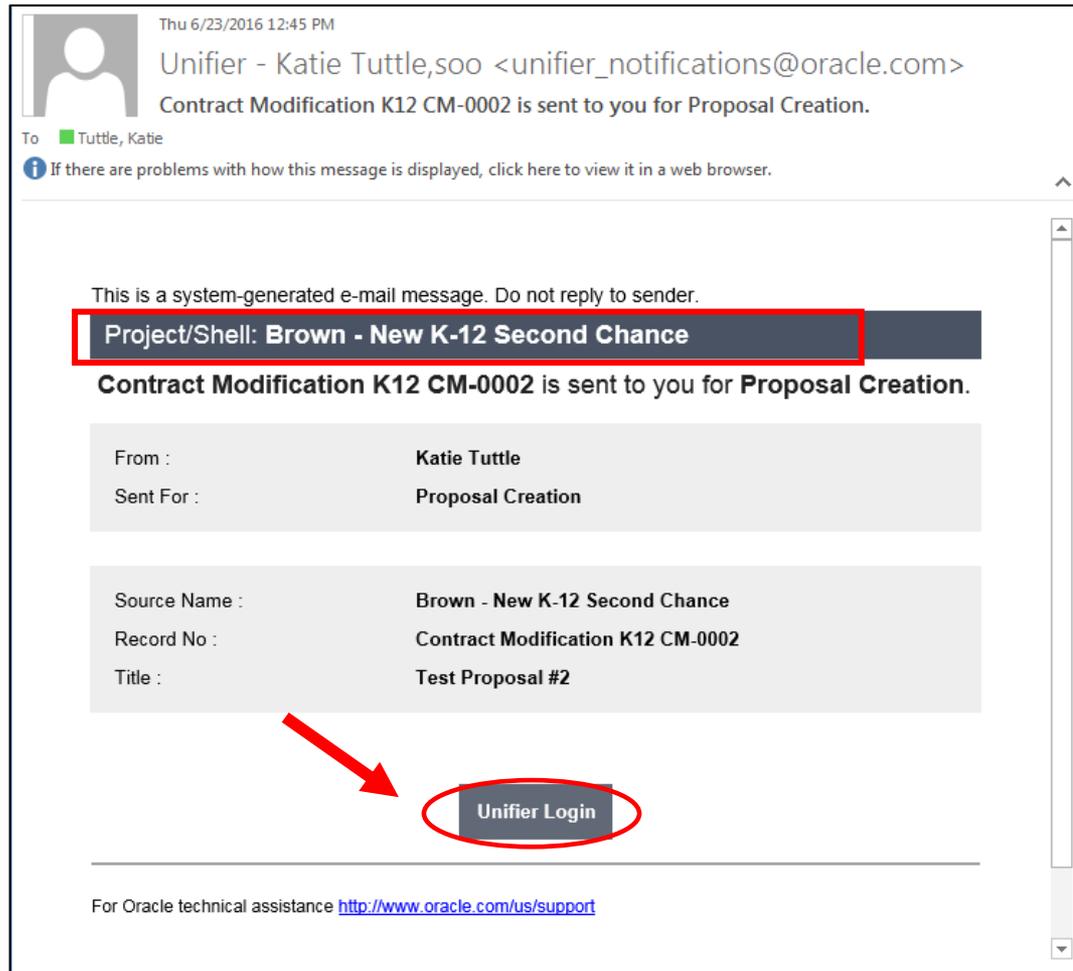
- ▶ Used when the revision to the Contract Schedule of Values will not adversely impact the construction schedule or the finished product if not implemented.
- ▶ The A/E initiates the proposal request and the Contractor provides pricing and time impact.
- ▶ Proposal Requests are labeled in OAKS CI as 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

# Create Cost Proposal

- ▶ The Contractor will receive an email notification from OAKS CI that they have a Contract Modification Task for Proposal Creation
- ▶ Click the Link to access your Task



# Cost Proposal

- ▶ Note information in Task Details
- ▶ Click Accept Task to begin work on the record

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

Secure | [https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=15&model=ucmk&fromcostlog=1&project\\_id=106](https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=15&model=ucmk&fromcostlog=1&project_id=106)

File Edit View Actions Help

**Accept Task** Decline Task SOV Review Close Window

Contract Modification K12

**General**

General

Project Number: SFC-080001.01 Record Number: CM-0011

Project Name: Oak Hills Local Building Project Creator: [Katie Tuttle](#)

Organization Name: Creation Date: 06/16/2017 11:26 AM (UTC-8)

Facility Name: Status: Pending

**Task Details**

From: [Katie Tuttle](#); Task Due Date: Task Notes (0)

To: [CM-R:Contractor](#); Task Status: [Not Started](#) Workflow Progress

Cc:

Sent For: Proposal Creation

**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	LFI Percent	Subcontra
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Grid Find Show Filtered Total Amount Total Amount: \$0.00

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

# Cost and Time Impact

- ▶ Click the General Tab to expand
- ▶ Scroll down to the Change Order Cost and Time Impact section
- ▶ Enter Contract Days Changed and/or Total Dollar Amount

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

Secure | [https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\\_id=186762&model=ucmk&project\\_id=1086&initiateF](https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186762&model=ucmk&project_id=1086&initiateF)

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Add Attachment Discussion SOV Review

Close Window Contract Modification K12

**General**

**Change Order Cost and Time Impact**

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:

Contract Days Changed This CO:

Revised Completion Date:

Total Amount (\$):

Line Item Total (\$):

Difference (\$):

**Basis of Change Order**

Change Order Basis:

Other Description:

**Document Publishing**

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path:

**Notes**

**Action Details**

Line Item List

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

# Add Line Items

- ▶ Enter the Cost Proposal Amounts by adding line items to the record
- ▶ Click Line Item List tab

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

Secure | [https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\\_id=186762&model=ucmk&project\\_id=1086&initiateBP=&bulkautoacce](https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186762&model=ucmk&project_id=1086&initiateBP=&bulkautoacce)

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

**General** Contract Modification K12

**Change Order Cost and Time Impact**

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:	<input type="text"/>	Total Amount (\$):	<input type="text" value="\$5,000.00"/>
Contract Days Changed This CO:	<input type="text" value="45"/>	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:

**Document Publishing**

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path:

**Notes**

Notes:

**Action Details**

**Line Item List**

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

# Add Line Items

- ▶ Click Add

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

Secure | [https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\\_id=186762&model=ucmk&project\\_id=1086&initiateBP=&bulkautoacce](https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186762&model=ucmk&project_id=1086&initiateBP=&bulkautoacce)

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

General Contract Modification K12

Action Details

Line Item List

Current View: All Show Currency in: Transaction Currency

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

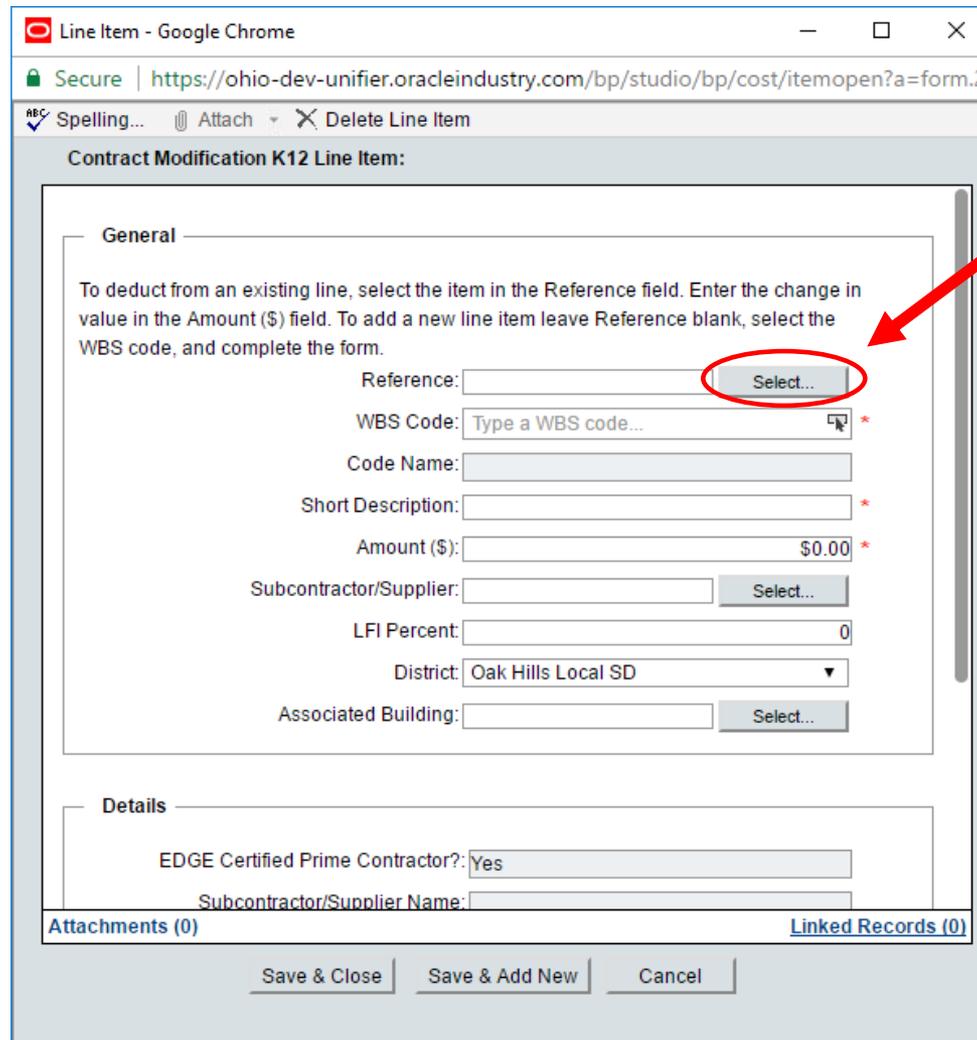
No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Sup
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Add Copy Import Remove Grid Find Show Filtered Total Amount Total Amount: \$0.00

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

# Deduct from a Current Line on the SOV

- ▶ To deduct money from a current line on the Contract Schedule of Values (SOV), click the Select button next to Reference



The screenshot shows a web browser window titled "Line Item - Google Chrome" with the URL <https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=form.2>. The page content is titled "Contract Modification K12 Line Item:" and contains a "General" section with the following instructions: "To deduct from an existing line, select the item in the Reference field. Enter the change in value in the Amount (\$) field. To add a new line item leave Reference blank, select the WBS code, and complete the form." The form fields include: Reference (with a "Select..." button circled in red and a red arrow pointing to it), WBS Code (with a placeholder "Type a WBS code..."), Code Name, Short Description, Amount (\$) (with a value of \$0.00), Subcontractor/Supplier (with a "Select..." button), LFI Percent (with a value of 0), District (with a dropdown menu showing "Oak Hills Local SD"), and Associated Building (with a "Select..." button). Below the "General" section is a "Details" section with "EDGE Certified Prime Contractor?" (with a value of "Yes") and "Subcontractor/Supplier Name:". At the bottom of the form are "Attachments (0)" and "Linked Records (0)" links, and three buttons: "Save & Close", "Save & Add New", and "Cancel".

# Deduct Line

- ▶ Highlight the SOV line you wish to deduct money from by clicking the line in the **WBS Item** column
- ▶ Click Select

Commit Line Item Picker - Google Chrome

Secure | <https://ohio-dev-unifier.oracleindustry.com/bp/psov/lineitem/picker?recordid=7&commitModel=ucsovk&fromLiPic=true>

Select Find Close Window

Commit Line Item Picker

Item #	Ref.	WBS Item	WBS Code
000010	1	Concrete Labor	<a href="#">CE-FC-03L</a>
000020	2	Concrete Material	<a href="#">CE-FC-03M</a>
000030	3	Exterior Improvements Labor (EDGE)	<a href="#">CE-SI-32L</a>
000040	4	Exterior Improvements Material (EDGE)	<a href="#">CE-SI-32M</a>
000050	5	Subcontractor work	<a href="#">CE-01-IN</a>
000060	6	Subcontractor Work	<a href="#">CE-CE-SW</a>

# Deduct Line

- ▶ Information is populated into the form
- ▶ Enter the Deduct Amount
- ▶ Enter any other necessary information
  
- ▶ To continue adding lines, click “Save & Add New”
- ▶ To Finish, click “Save & Close”

Line Item - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/cost/itemop

Spelling... Attach Delete Line Item

Contract Modification K12 Line Item:

**General**

To deduct from an existing line, select the item in the Reference field. Enter the change in value in the Amount (\$) field. To add a new line item leave Reference blank, select the WBS code, and complete the form.

Reference: 2 Select...

WBS Code: CE-FC-03M \*

Code Name: Concrete Matl

Short Description: Concrete Material \*

Amount (\$): -\$500.00 \*

Subcontractor/Supplier: Select...

LFI Percent: 0

District: Oak Hills Local SD

Associated Building: Select...

**Details**

EDGE Certified Prime Contractor?: Yes

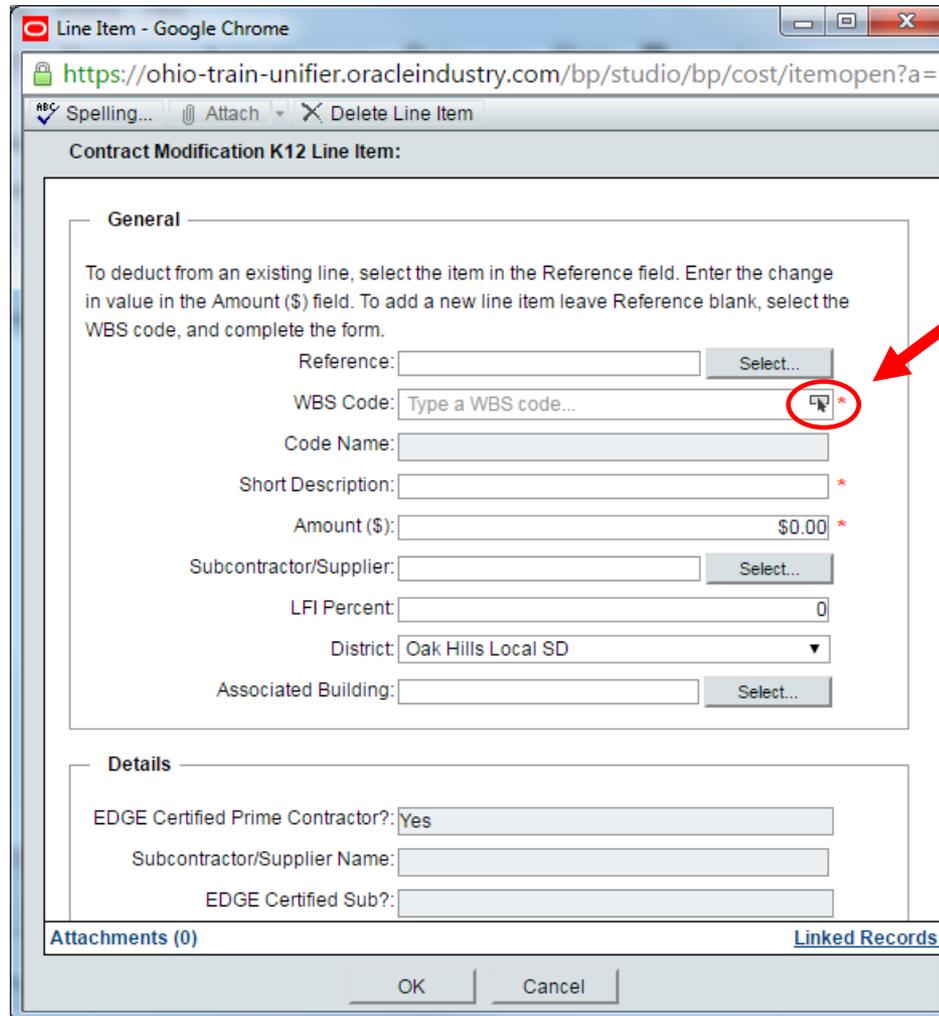
Subcontractor/Supplier Name:

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

Save & Close Save & Add New Cancel

# Add a New Line to the SOV

- ▶ To Add a New Line to the Contract Schedule of Values (SOV), click the arrow next to WBS Code



The screenshot shows a web browser window titled "Line Item - Google Chrome" with the URL <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=>. The page content is titled "Contract Modification K12 Line Item:" and contains a "General" section with the following fields and instructions:

To deduct from an existing line, select the item in the Reference field. Enter the change in value in the Amount (\$) field. To add a new line item leave Reference blank, select the WBS code, and complete the form.

Reference:

WBS Code:   \*

Code Name:

Short Description:  \*

Amount (\$):  \*

Subcontractor/Supplier:

LFI Percent:

District:

Associated Building:

The "↕" button next to the WBS Code field is circled in red, and a red arrow points to it from the right. Below the "General" section is a "Details" section with the following fields:

EDGE Certified Prime Contractor?:

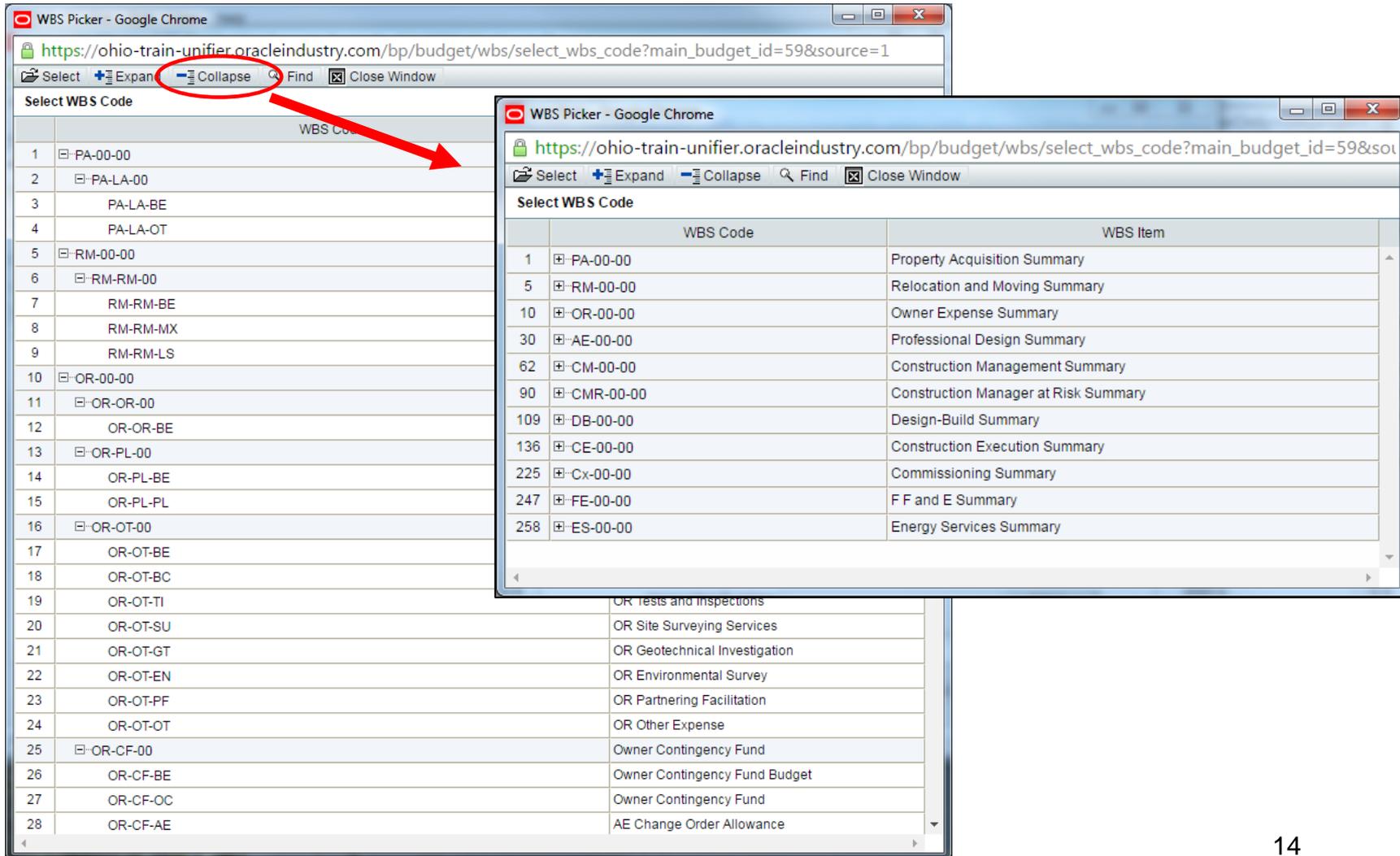
Subcontractor/Supplier Name:

EDGE Certified Sub?:

At the bottom of the form, there are "Attachments (0)" and "Linked Records" links, and "OK" and "Cancel" buttons.

# Add a New Line to the SOV

- ▶ Click Collapse to simplify the list



The screenshot shows the WBS Picker application in a Google Chrome browser window. The URL is [https://ohio-train-unifier.oracleindustry.com/bp/budget/wbs/select\\_wbs\\_code?main\\_budget\\_id=59&source=1](https://ohio-train-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_code?main_budget_id=59&source=1). The application displays a table titled "Select WBS Code" with columns for "WBS Code" and "WBS Item". A red circle highlights the "Collapse" button in the browser's toolbar, and a red arrow points to it. The table lists various WBS codes and their corresponding items, such as "PA-00-00" for "Property Acquisition Summary" and "RM-00-00" for "Relocation and Moving Summary".

	WBS Code	WBS Item
1	PA-00-00	Property Acquisition Summary
5	RM-00-00	Relocation and Moving Summary
10	OR-00-00	Owner Expense Summary
30	AE-00-00	Professional Design Summary
62	CM-00-00	Construction Management Summary
90	CMR-00-00	Construction Manager at Risk Summary
109	DB-00-00	Design-Build Summary
136	CE-00-00	Construction Execution Summary
225	Cx-00-00	Commissioning Summary
247	FE-00-00	F F and E Summary
258	ES-00-00	Energy Services Summary

	WBS Code	WBS Item
19	OR-OT-TI	OR tests and inspections
20	OR-OT-SU	OR Site Surveying Services
21	OR-OT-GT	OR Geotechnical Investigation
22	OR-OT-EN	OR Environmental Survey
23	OR-OT-PF	OR Partnering Facilitation
24	OR-OT-OT	OR Other Expense
25	OR-CF-00	Owner Contingency Fund
26	OR-CF-BE	Owner Contingency Fund Budget
27	OR-CF-OC	Owner Contingency Fund
28	OR-CF-AE	AE Change Order Allowance

# Add a New Line to the SOV

- ▶ Click the plus sign next to WBS codes to expand
- ▶ Highlight appropriate code and click select

WBS Picker - Google Chrome

[https://ohio-train-unifier.oracleindustry.com/bp/budget/wbs/select\\_wbs\\_code?main\\_budget\\_id=59&source](https://ohio-train-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_code?main_budget_id=59&source)

Select Expand Collapse Find Close Window

Select WBS Code

	WBS Code	WBS Item
1	PA-00-00	Property Acquisition Summary
5	RM-00-00	Relocation and Moving Summary
10	OR-00-00	Owner Expense Summary
30	AE-00-00	Professional Design Summary
62	CM-00-00	Construction Management Summary
90	CMR-00-00	Construction Manager at Risk Summary
109	DB-00-00	Design-Build Summary
136	CE-00-00	Construction Execution Summary
137	CE-CE-00	Construction Execution General
143	CE-CSC-00	Construction Execution General
146	CE-01-00	General Conditions
153	CE-FC-00	Facility Construction
154	CE-FC-BE	Facility Construction Budget
155	CE-FC-02L	Existing Conditions Labr
156	CE-FC-02M	Existing Conditions Matl
157	CE-FC-03L	Concrete Labr
158	CE-FC-03M	Concrete Matl
159	CE-FC-04L	Masonry Labr
160	CE-FC-04M	Masonry Matl
161	CE-FC-05L	Metals Labr
162	CE-FC-05M	Metals Matl
163	CE-FC-06L	Wood Plastic and Composite Labr

# Add a New Line to the SOV

- ▶ Information is populated into the form
  - ▶ Enter a Short Description
  - ▶ Enter the Amount
  - ▶ Enter any other necessary information
- 
- ▶ To continue adding lines, click “Save & Add New”
  - ▶ To Finish, click “Save & Close”

Line Item - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/cost/itemop

Spelling... Attach Delete Line Item

Contract Modification K12 Line Item:

General

To deduct from an existing line, select the item in the Reference field. Enter the change in value in the Amount (\$) field. To add a new line item leave Reference blank, select the WBS code, and complete the form.

Reference:  Select...

WBS Code:  \*

Code Name:

Short Description:  \*

Amount (\$):  \*

Subcontractor/Supplier:  Select...

LFI Percent:

District:

Associated Building:  Select...

Details

EDGE Certified Prime Contractor?:

Subcontractor/Supplier Name:

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

Save & Close Save & Add New Cancel

# Review Line Item List

- ▶ Line will populate into the lower form of the record
- ▶ **Note:** Deduct line should always reference a current line from the SOV and Add line should always have a reference of “0”

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

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\_id=186762&model=ucmk&project\_id=1086&initiateBP=&bulkautoacce

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

General Contract Modification K12

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/Sup
002	0	CE-FC-04L	Masonry Labr	Masonry Labor	\$500.00	0	
001	2	CE-FC-03M	Concrete Matl	Concrete Material	-\$500.00	0	

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

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

# Review Amounts

- ▶ Review Change Order Cost and Time Impact Section
- ▶ The Difference should always be \$0

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

Secure | [https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task\\_id=186762&model=ucmk&project\\_id=1086&initiateBP=&bulkautoacce](https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=186762&model=ucmk&project_id=1086&initiateBP=&bulkautoacce)

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Add Attachment Discussion SOV Review Close Window

### Contract Modification K12

#### General

Change Order Cost and Time Impact

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:	<input type="text"/>	Total Amount (\$):	<input type="text" value="\$5,000.00"/> *
Contract Days Changed This CO:	<input type="text" value="45"/>	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:	<input type="text"/>	Other Description:	<input type="text"/>
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Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path:

#### Action Details

#### Line Item List

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



# Send the Record

- ▶ Select Workflow Action: Submit
- ▶ “To” Box populates
- ▶ Click Send

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

Secure | [https://ohio-dev-unifier.oracleindustry.com/bpm/process/task/open?task\\_id=186762&model=ucmk&project\\_id=1086&initiateBP=&bulkautoacce](https://ohio-dev-unifier.oracleindustry.com/bpm/process/task/open?task_id=186762&model=ucmk&project_id=1086&initiateBP=&bulkautoacce)

File Edit View Actions Help

Workflow Actions: Submit (dropdown) Send (button)

General: Submit (dropdown), Reject (dropdown)

Change Order Cost and Time Impact

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:  Total Amount (\$):

Action Details

Submit (Click here to view latest content)

To...: Archana Atrey, Barbara Taylor, Bill Schwertfage

Cc...:

Send For: AE Review

Task Notes:

Workflow Progress

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/Sup
002	0	CE-FC-04L	Masonry Labr	Masonry Labor	\$500.00	0	

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

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