Minnesota State Colleges and Universities

Proposal Request (PR)

For more information contact System Office e-Builder Support

Cherie Coughlin
Cherie.coughlin@minnstate.edu
(651) 201-1586

Mailor Moua
Mailor.moua@minnstate.edu
(651)-201-1782

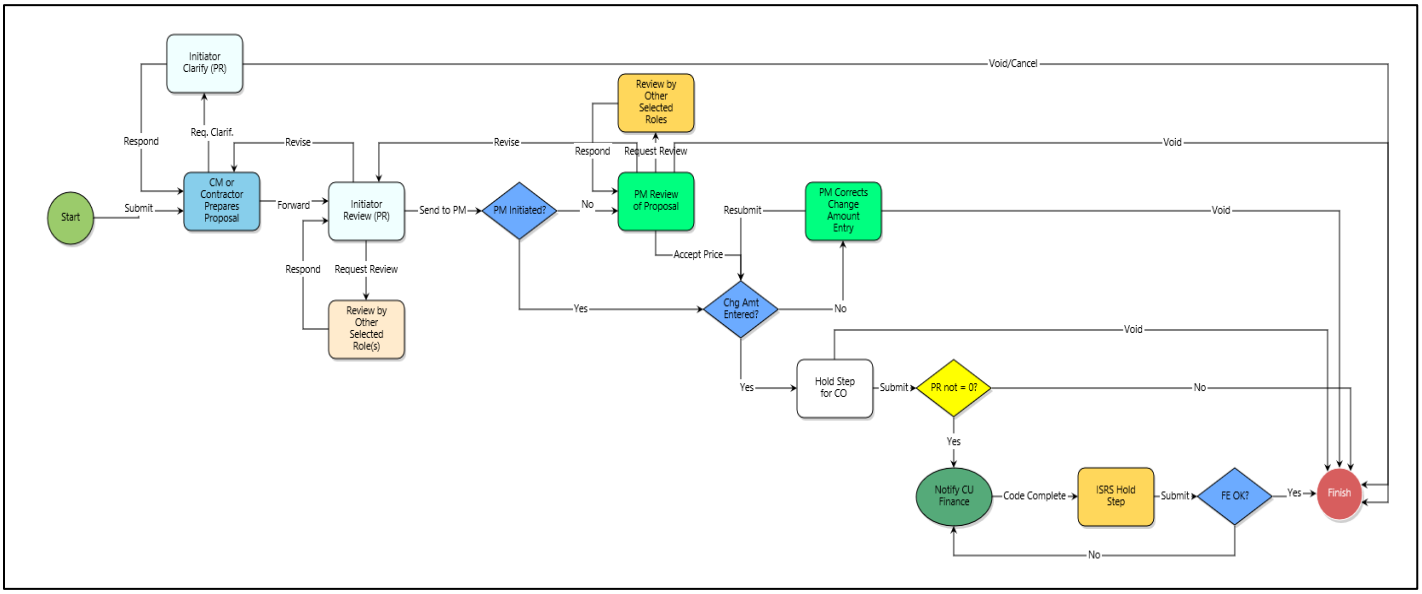
Website:
http://www.minnstate.edu/system/finance/facilities/design-construction/index.html

Table of Contents

Proposal Request (PR) Process 3
Initiator starts the PR process (Actor: A/E, PM, or Consultant Hazmat) 3
Contractor Prepares Proposal (Actor: Contractor-Prime) 7
Initiator Review (PR) (Actor: AE, PM, or Consultant-Hazmat) 10
PM Review of Proposal (Actor: PM) 11
Hold Step for CO (Actor: None) 12

Proposal Request (PR) Process

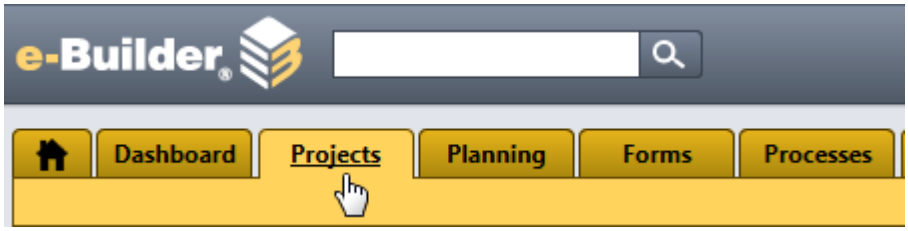
A/E, PM, and Haz Mat Consultant initiate Proposal Request (PR) to Contractor for Changed Work. Upon acceptance of the Contractor's Proposal, PR is placed in a "Hold for CO" step where it becomes available for selection in to a Change Order (CO2) process.



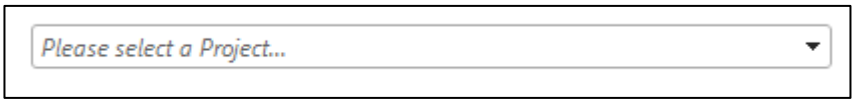
Initiator starts the PR process (Actor: A/E, PM, or Consultant Hazmat)

A/E, PM or Consultant Hazmat starts the PR process.

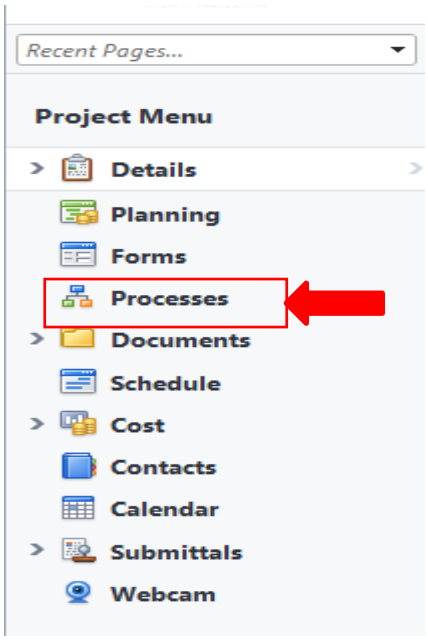
1. Click **Projects** from the Top Navigation tabs.



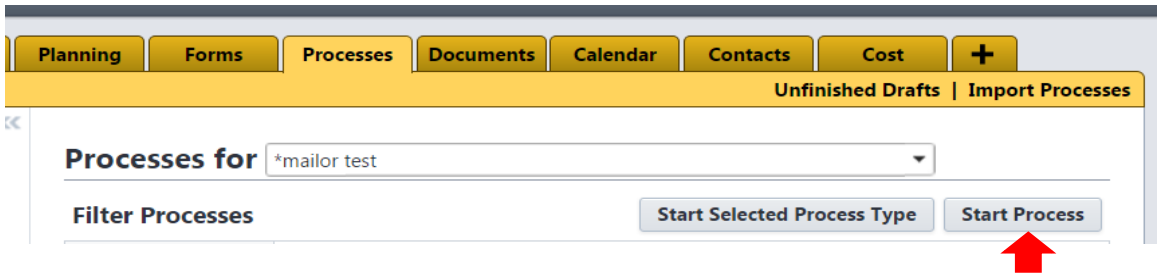
2. Select a project from the drop-down list.



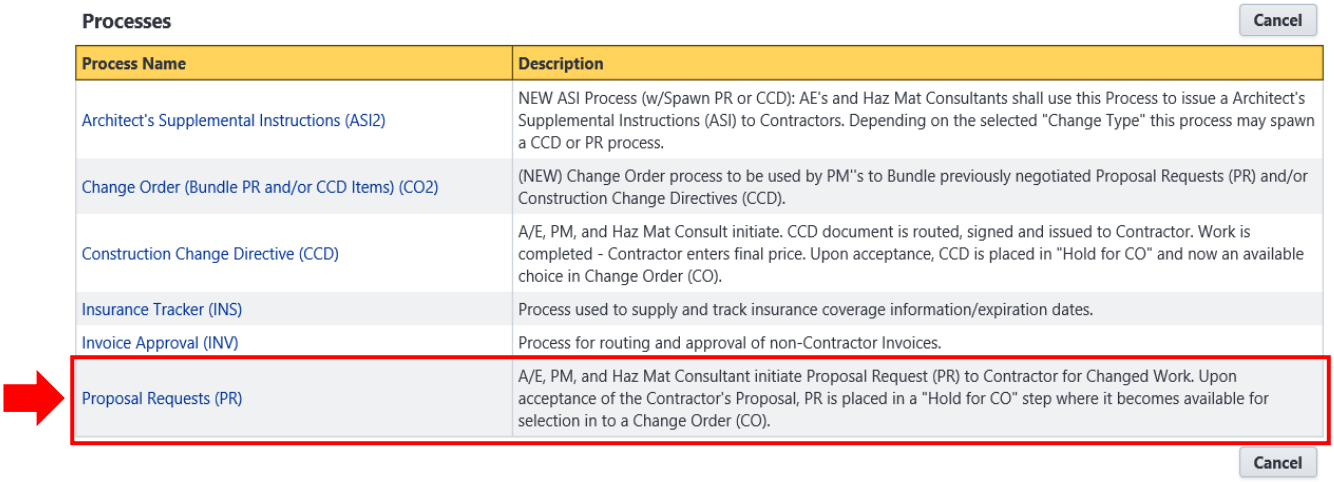
3. Select **Processes** from the Project Menu on the left hand side.



4. Click on **Start Process**



5. Select the **Proposal Request (PR)** process from the list



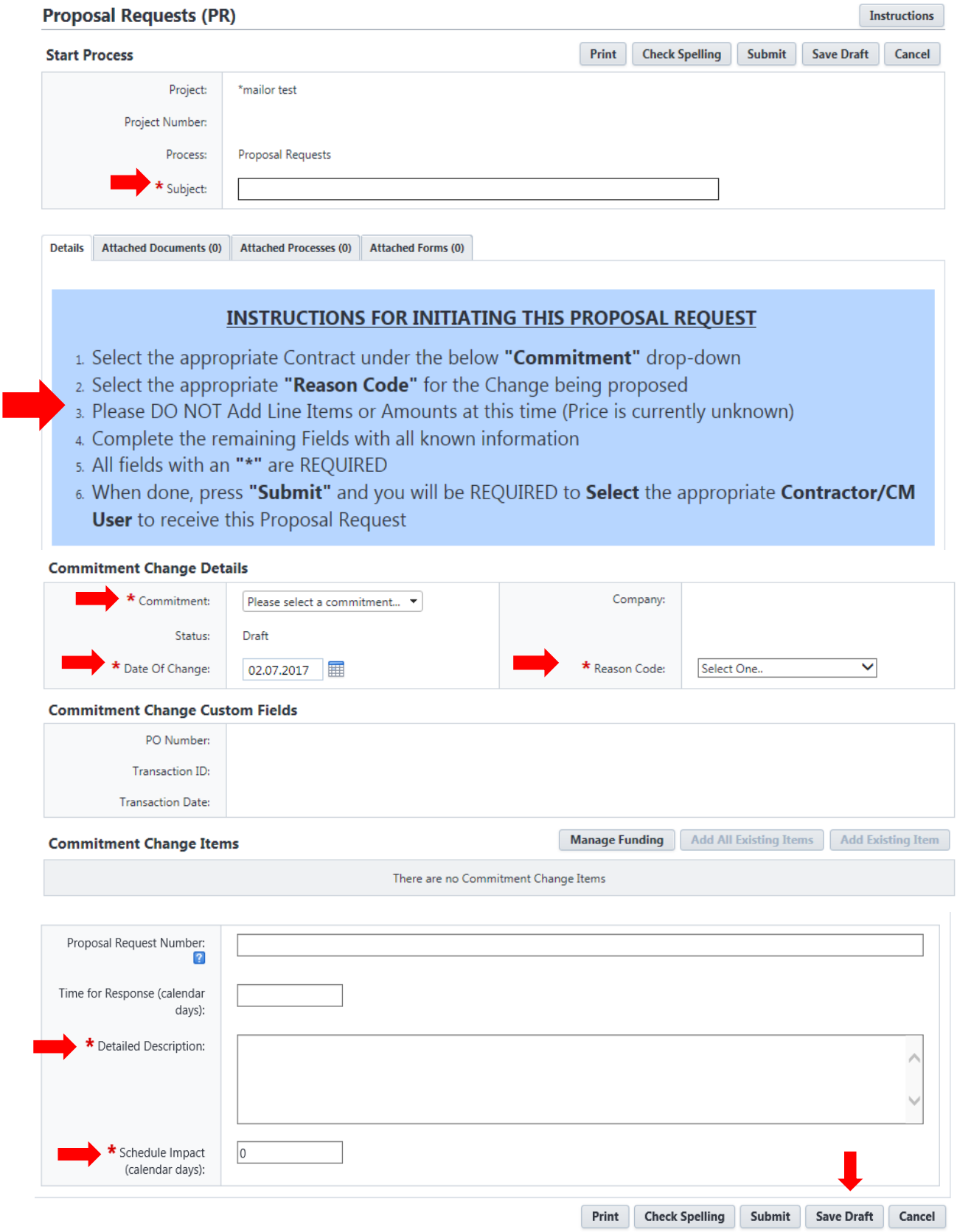
Processes

Cancel

Process Name	Description
Architect's Supplemental Instructions (ASI2)	NEW ASI Process (w/Spawn PR or CCD): AE's and Haz Mat Consultants shall use this Process to issue a Architect's Supplemental Instructions (ASI) to Contractors. Depending on the selected "Change Type" this process may spawn a CCD or PR process.
Change Order (Bundle PR and/or CCD Items) (CO2)	(NEW) Change Order process to be used by PM''s to Bundle previously negotiated Proposal Requests (PR) and/or Construction Change Directives (CCD).
Construction Change Directive (CCD)	A/E, PM, and Haz Mat Consult initiate. CCD document is routed, signed and issued to Contractor. Work is completed - Contractor enters final price. Upon acceptance, CCD is placed in "Hold for CO" and now an available choice in Change Order (CO).
Insurance Tracker (INS)	Process used to supply and track insurance coverage information/expiration dates.
Invoice Approval (INV)	Process for routing and approval of non-Contractor Invoices.
Proposal Requests (PR)	A/E, PM, and Haz Mat Consultant initiate Proposal Request (PR) to Contractor for Changed Work. Upon acceptance of the Contractor's Proposal, PR is placed in a "Hold for CO" step where it becomes available for selection in to a Change Order (CO).

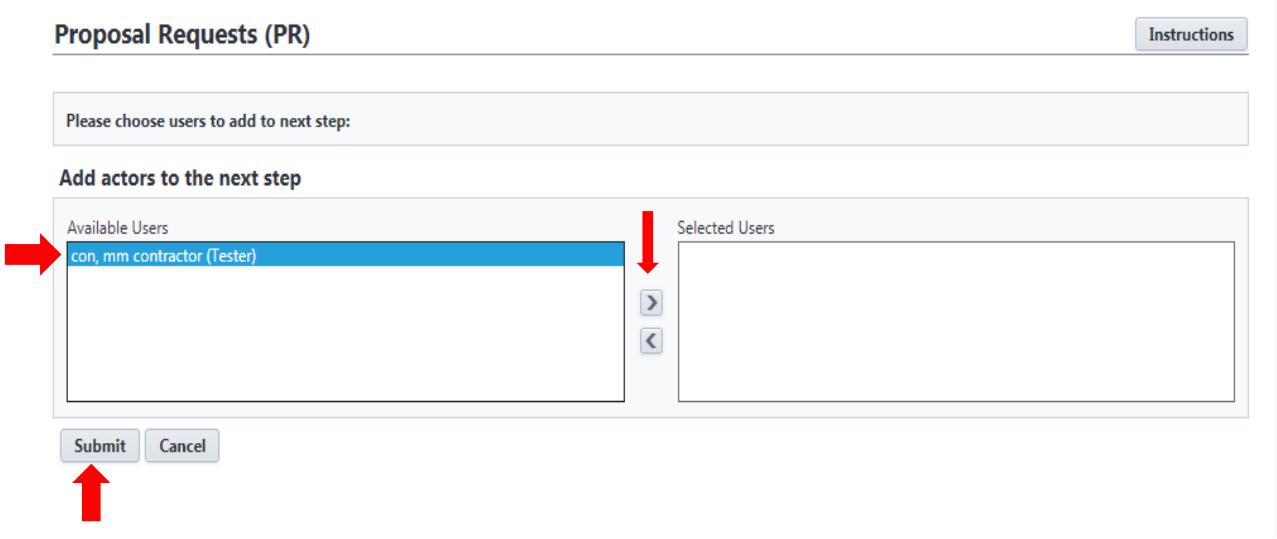
Cancel

6. Fill out the information in the Proposal Request page. Follow the instruction in the **Blue section**.



7. Click “Submit” to move to the next step.
8. Choose a Contractor to add to the next step

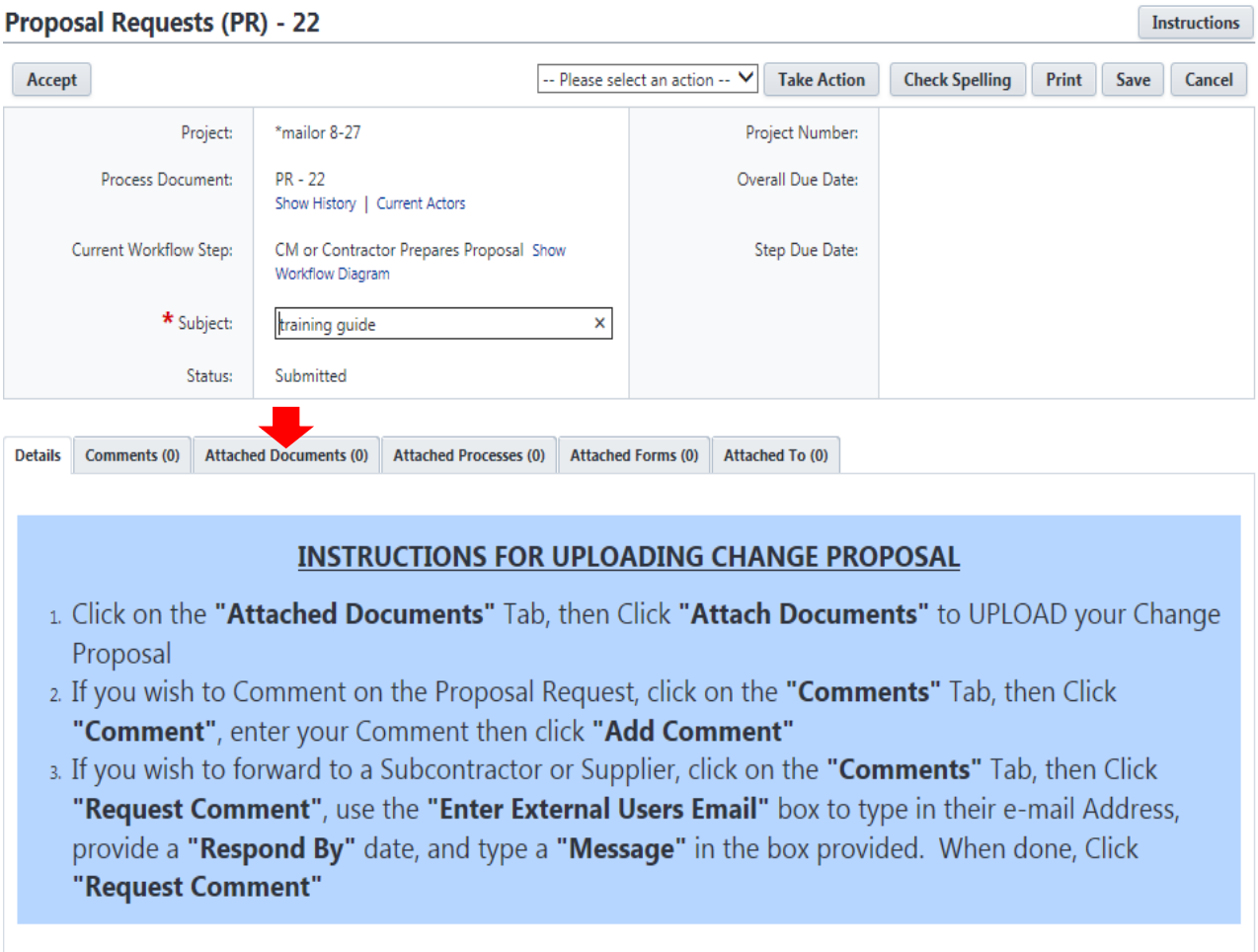
a. Click on the name of the contractor in the Add actors to the next step box. The name will be highlighted
b. Click on the arrow to move it to the Selected users box
c. Click on Submit to move it to the next step.



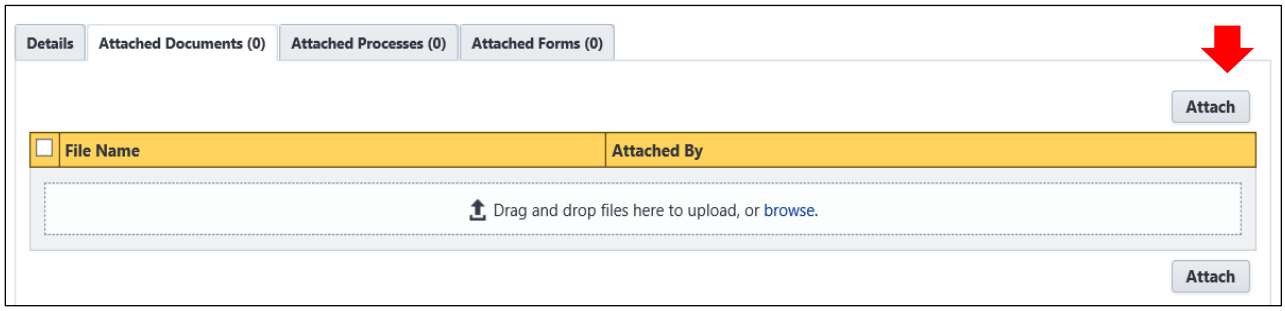
Contractor Prepares Proposal (Actor: Contractor-Prime)

Contractor upload change proposal document and add comment. Follow the instruction in the **blue area** for uploading Change Proposal.

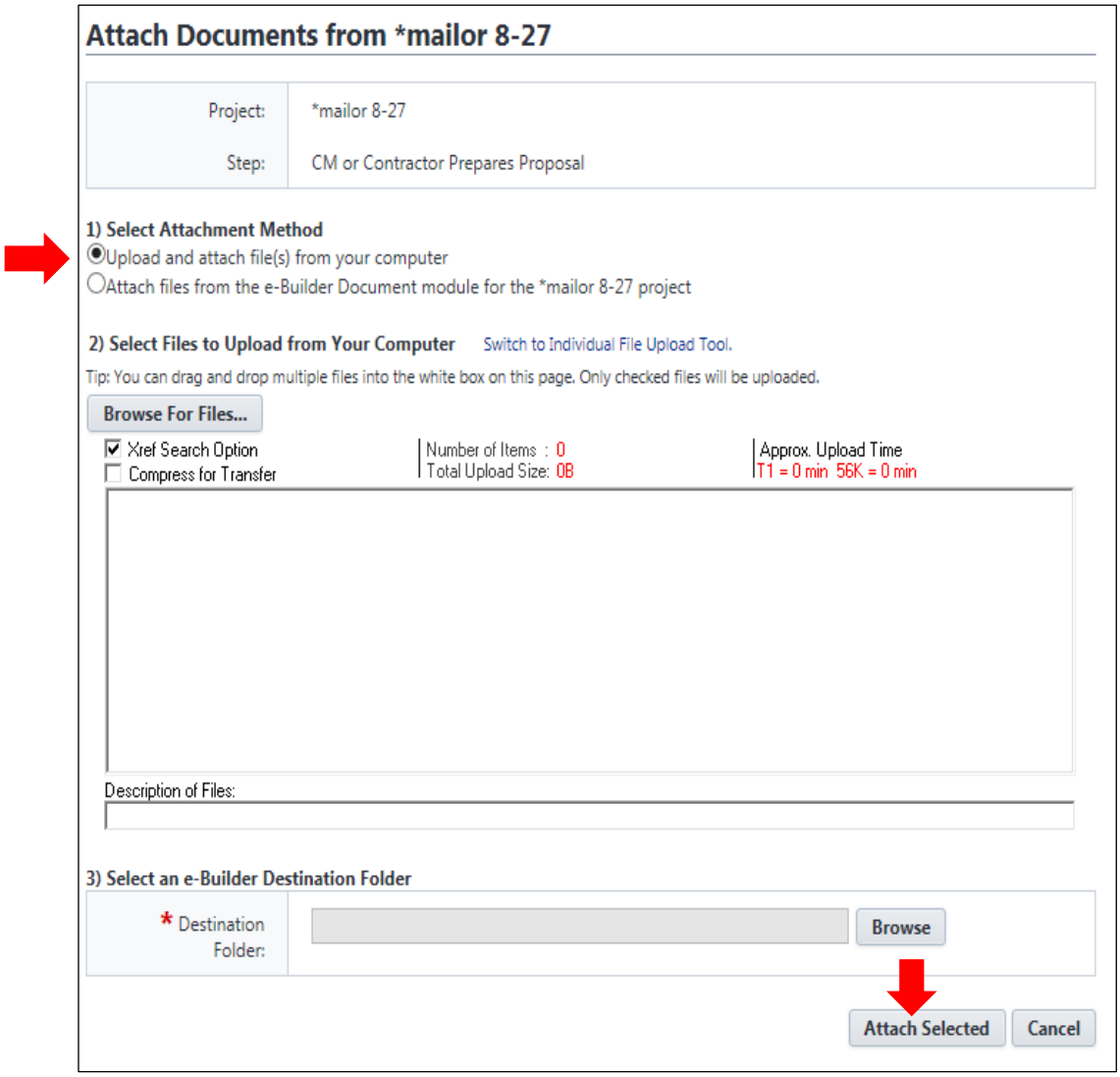
1. Click on the "Attached Documents" Tab,



2. Click Attach.

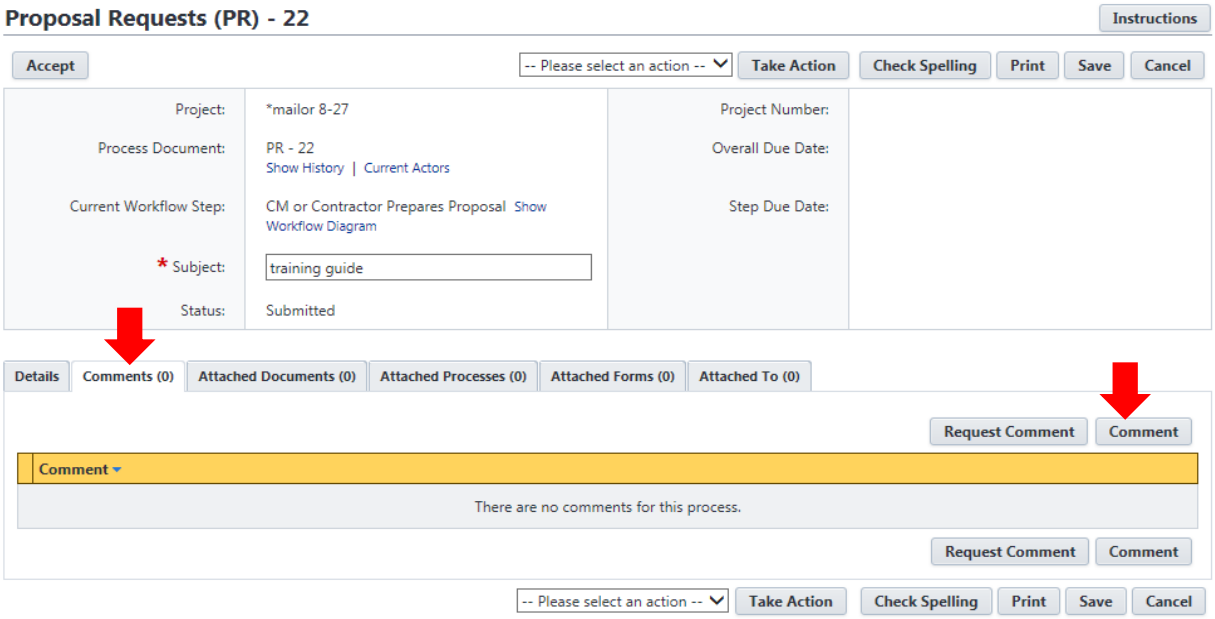


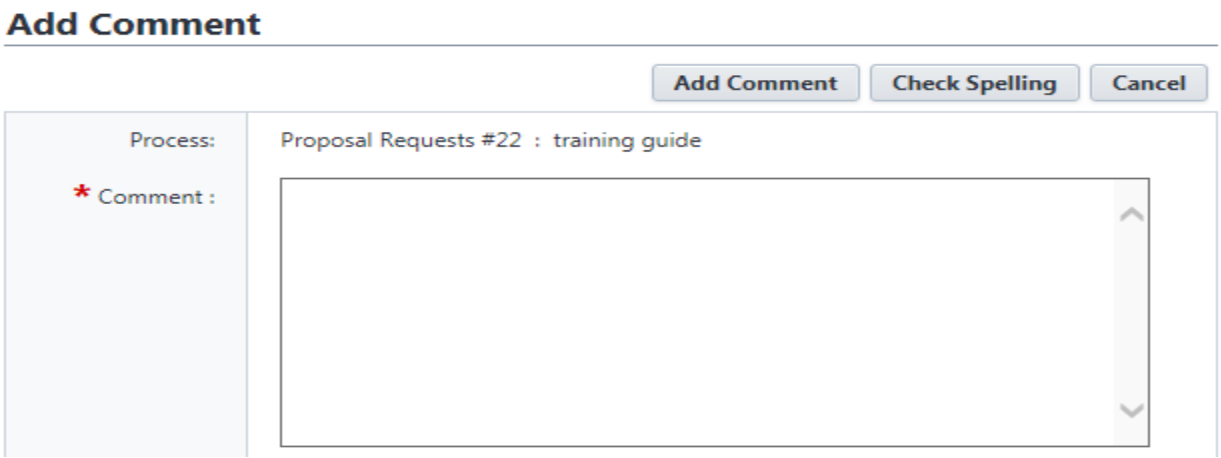
3. Select Attachment Methods.
   a) Upload and attach file(s) from your computer.
   b) Attach files from the e-Builder Document module. (*Select this option only if you already upload the document into the e-Builder Document structure.)*



   c. Select an e-Builder Destination Folder
   d. Click on Browse
   e. Click on the + sign to expand the folder
   f. Click on the link of the destination folder
   g. Click on Attach Selected to upload the document.

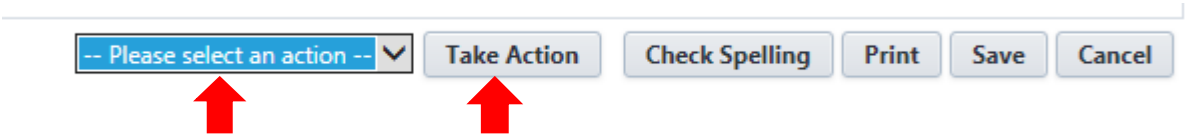
9. If you wish to Comment on the Proposal Request, click on the "Comments" Tab, then Click "Comment", enter your Comment then click "Add Comment"





10. If you wish to forward to a Subcontractor or Supplier, click on the "Comments" Tab, then Click "Request Comment", use the "Enter External Users Email" box to type in their e-mail Address, provide a "Respond By" date, and type a "Message" in the box provided. When done, Click "Request Comment"

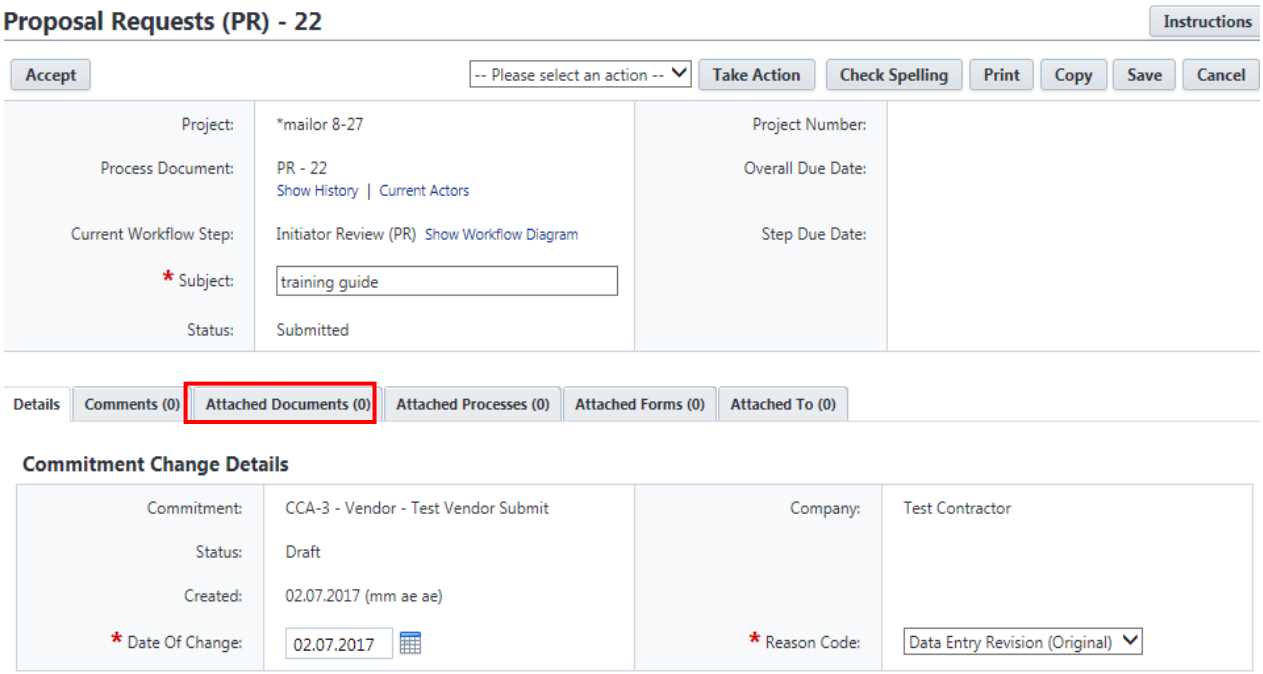
11. Select an action from the drop-down list and click on “Take Action” to move it to the next step.



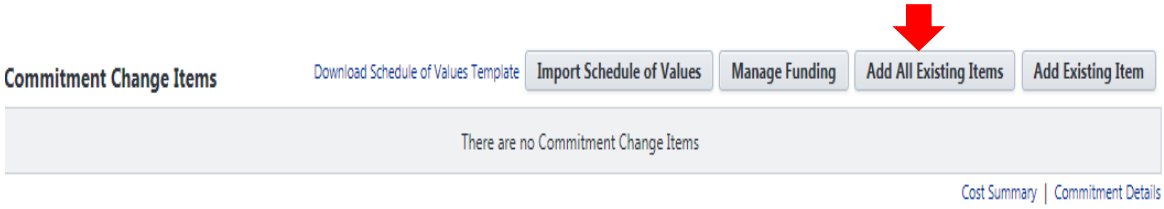
Initiator Review (PR) (Actor: AE, PM, or Consultant-Hazmat)

Initiator review pricing documentation from the Contractor and forward it to the Project Manager for acceptance.

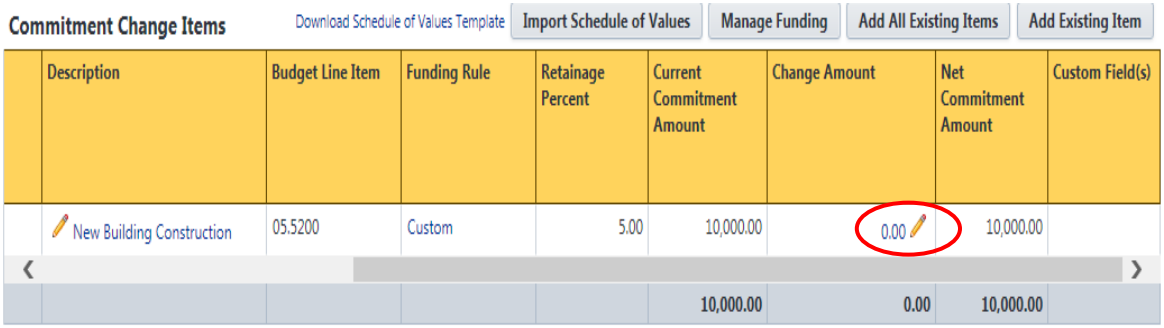
1. Review the information on the page. Download the document from the "Attached Documents" tab



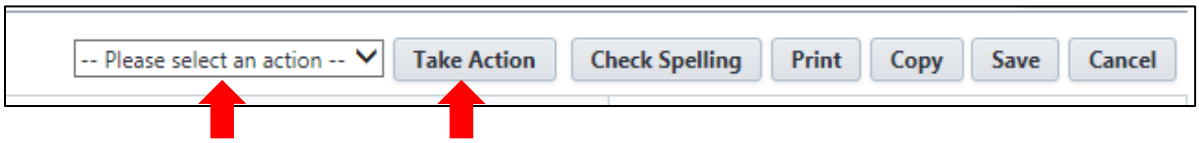
2. Adding Commitment Change Items
   a. Click on the "Add All Existing Items"



   b. The Commitment Change Items table will be displayed
      i. Click on the pencil in the "Change Amount" column to enter the amount.

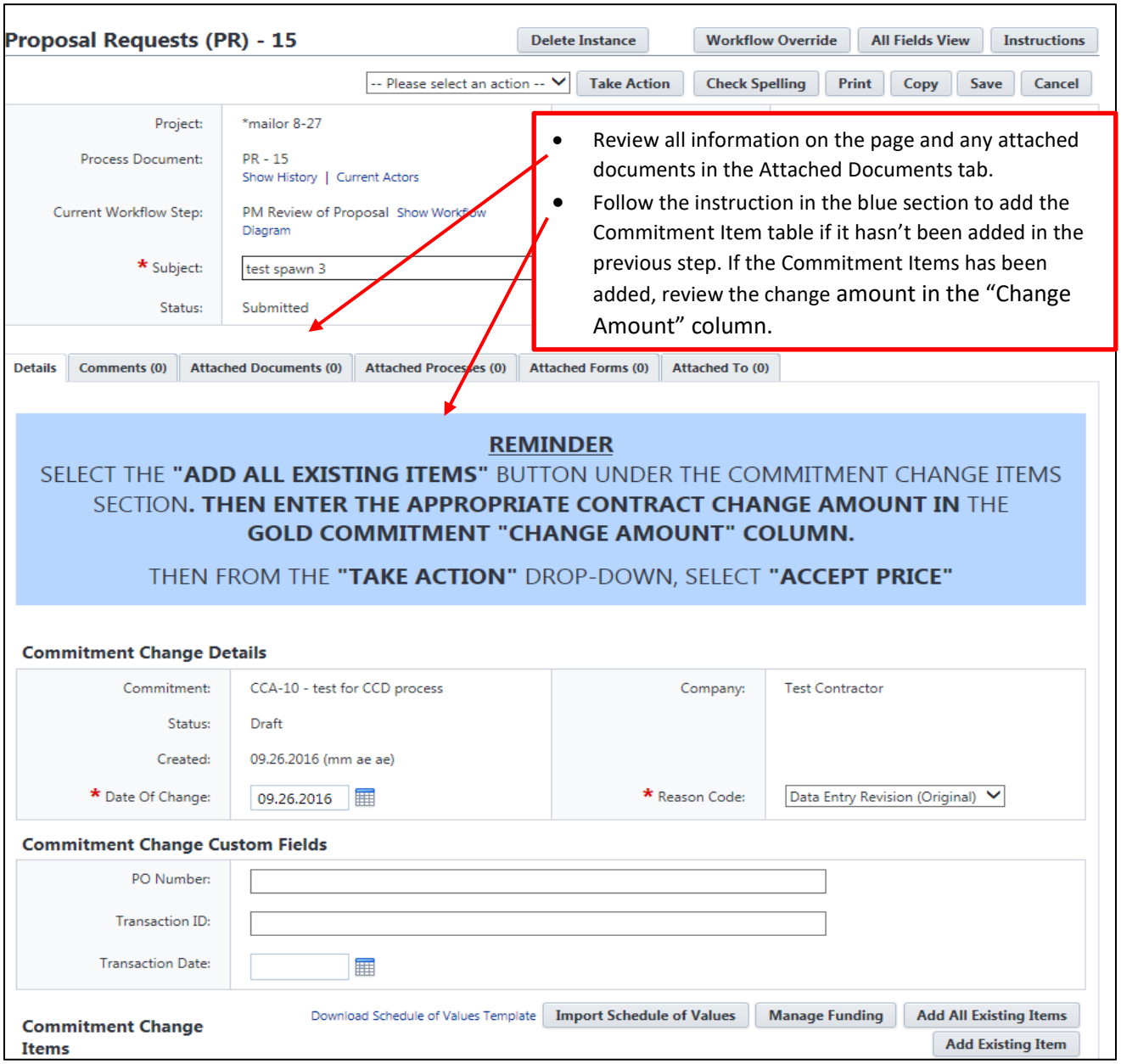


c. Review the rest of the information on the page and then select an action and click on "Take Action" to move it to the next step.



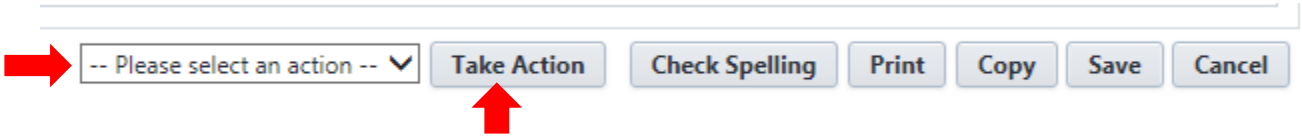
PM Review of Proposal (Actor: PM)

Project Manager review all information on the page. If the Commitment Change Items has not been added then add the Commitment Change Items table.



- Review all information on the page and any attached documents in the Attached Documents tab.
- Follow the instruction in the blue section to add the Commitment Item table if it hasn't been added in the previous step. If the Commitment Items has been added, review the change amount in the "Change Amount" column.

1. Select an action and Take Action to move it to the next step.



Hold Step for CO (Actor: None)

This is a temporary step that holds all pending PRs until it gets attached to a Change Order (CO) process. It will automatically pull out of this step to the Finish when the CO process has been approved.