



MINNESOTA STATE

Minnesota State Colleges and Universities

Proposal Request (PR)

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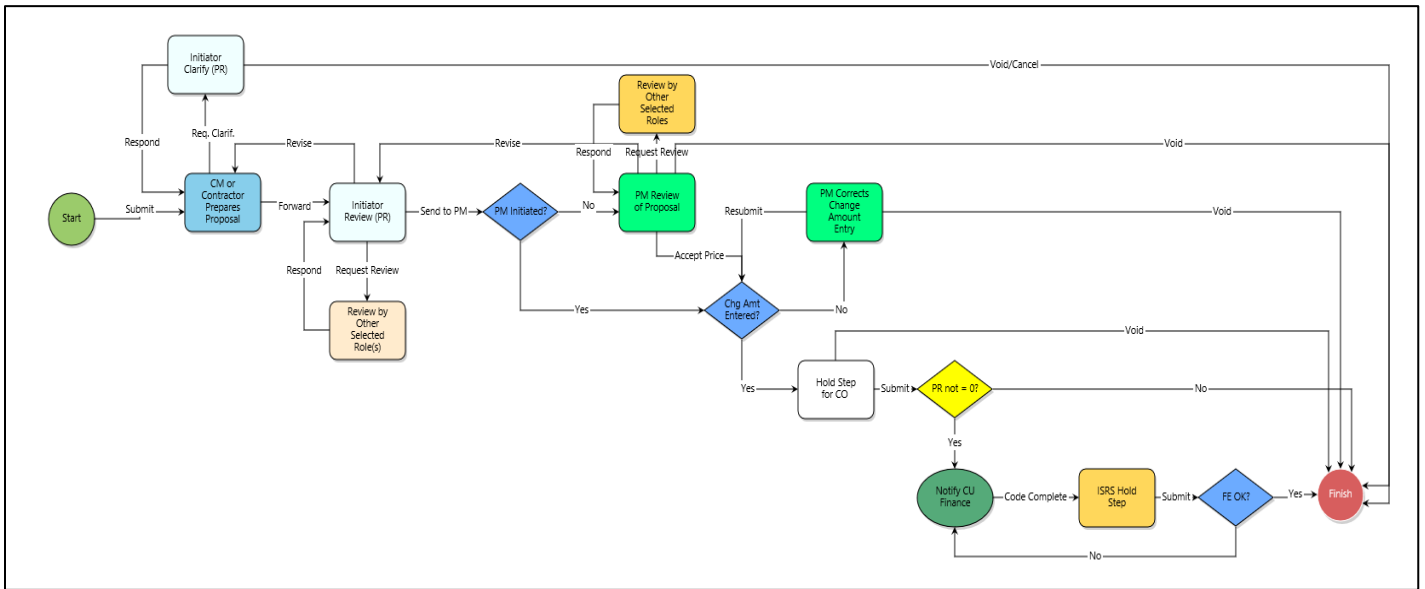
<http://www.minnstate.edu/system/finance/facilities/design-construction/index.html>

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Proposal Request (PR) Process

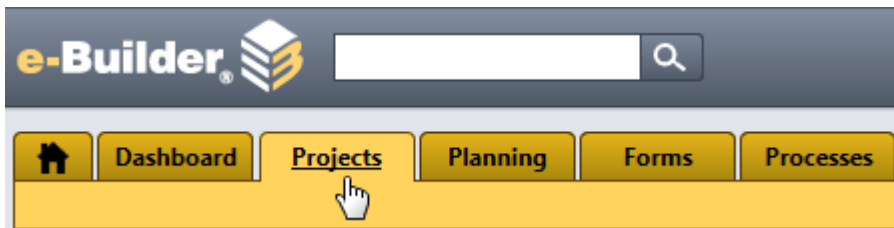
A/E, PM, and Haz Mat Consultant initiate Proposal Request (PR) to Contractor for Changed Work. Upon acceptance of the Contractor's Proposal, PR is placed in a "Hold for CO" step where it becomes available for selection in to a Change Order (CO2) process.



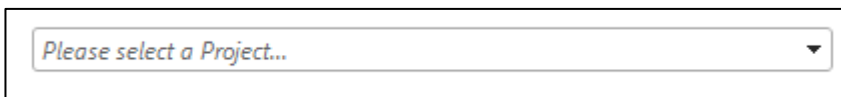
Initiator starts the PR process (Actor: A/E, PM, or Consultant Hazmat)

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

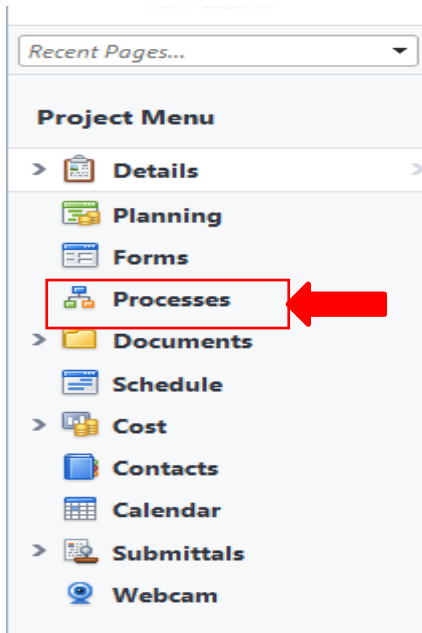
1. Click **Projects** from the Top Navigation tabs.



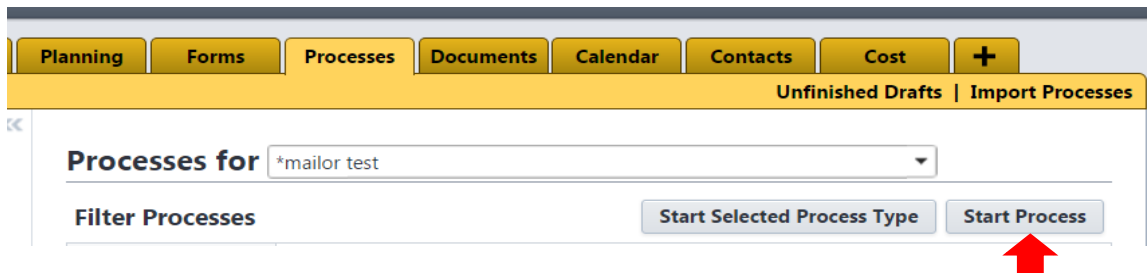
2. Select a project from the drop-down list.



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**.

Proposal Requests (PR)

Instructions

Start Process

Print Check Spelling Submit Save Draft Cancel

Project:	*mailor test
Project Number:	
Process:	Proposal Requests
* Subject:	<input type="text"/>

Details Attached Documents (0) Attached Processes (0) Attached Forms (0)

INSTRUCTIONS FOR INITIATING THIS PROPOSAL REQUEST

1. Select the appropriate Contract under the below "**Commitment**" drop-down
2. Select the appropriate "**Reason Code**" for the Change being proposed
3. Please DO NOT Add Line Items or Amounts at this time (Price is currently unknown)
4. Complete the remaining Fields with all known information
5. All fields with an "*" are REQUIRED
6. When done, press "**Submit**" and you will be REQUIRED to **Select** the appropriate **Contractor/CM User** to receive this Proposal Request

Commitment Change Details

* Commitment:	<input type="text" value="Please select a commitment..."/>	Company:	
Status:	Draft		
* Date Of Change:	<input type="text" value="02.07.2017"/>	* Reason Code:	<input type="text" value="Select One.."/>

Commitment Change Custom Fields

PO Number:	<input type="text"/>
Transaction ID:	<input type="text"/>
Transaction Date:	<input type="text"/>

Commitment Change Items

Manage Funding Add All Existing Items Add Existing Item

There are no Commitment Change Items

Proposal Request Number:	<input type="text"/>
Time for Response (calendar days):	<input type="text"/>
* Detailed Description:	<input type="text"/>
* Schedule Impact (calendar days):	<input type="text" value="0"/>

Print Check Spelling Submit Save Draft Cancel

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

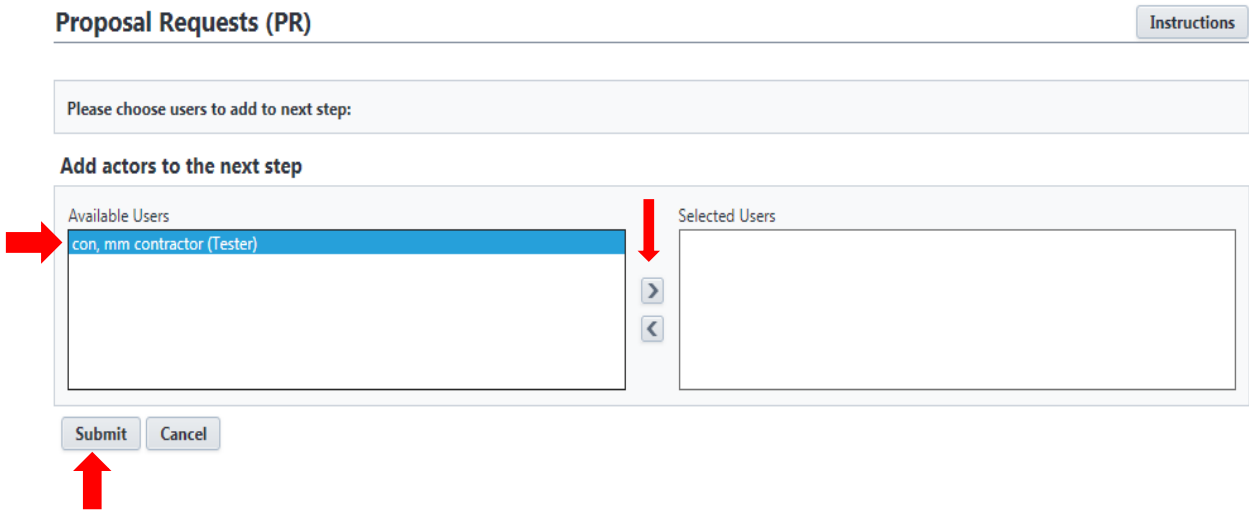
- a. Click on the name of the contractor in the Add actors to the next step box. The name will be highlighted
- b. Click on the arrow to move it to the Selected users box
- c. Click on Submit to move it to the next step.

Proposal Requests (PR) Instructions

Please choose users to add to next step:

Add actors to the next step

Available Users		Selected Users
con, mm contractor (Tester)	➤ ➤	



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,

Proposal Requests (PR) - 22 Instructions

Accept -- Please select an action -- Take Action Check Spelling Print Save Cancel

Project:	*mailor 8-27	Project Number:	
Process Document:	PR - 22 Show History Current Actors	Overall Due Date:	
Current Workflow Step:	CM or Contractor Prepares Proposal Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="training guide"/>		
Status:	Submitted		




Details **Comments (0)** **Attached Documents (0)** Attached Processes (0) Attached Forms (0) Attached To (0)

INSTRUCTIONS FOR UPLOADING CHANGE PROPOSAL

1. Click on the **"Attached Documents"** Tab, then Click **"Attach Documents"** to UPLOAD your Change Proposal
2. If you wish to Comment on the Proposal Request, click on the **"Comments"** Tab, then Click **"Comment"**, enter your Comment then click **"Add Comment"**
3. 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"**

2. Click Attach.

Details **Attached Documents (0)** Attached Processes (0) Attached Forms (0)

 **Attach**

<input type="checkbox"/> File Name	Attached By
↑ Drag and drop files here to upload, or browse .	

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.)*

Attach Documents from *mailor 8-27

Project:	*mailor 8-27
Step:	CM or Contractor Prepares Proposal

1) Select Attachment Method

Upload and attach file(s) from your computer
 Attach files from the e-Builder Document module for the *mailor 8-27 project

2) Select Files to Upload from Your Computer [Switch to Individual File Upload Tool.](#)

Tip: You can drag and drop multiple files into the white box on this page. Only checked files will be uploaded.

Browse For Files...

<input checked="" type="checkbox"/> Xref Search Option	Number of Items : 0	Approx. Upload Time
<input type="checkbox"/> Compress for Transfer	Total Upload Size: 0B	T1 = 0 min 56K = 0 min

Description of Files:

3) Select an e-Builder Destination Folder

* Destination Folder:	<input type="text"/>	<input type="button" value="Browse"/>
-----------------------	----------------------	---------------------------------------

- 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.

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

Proposal Requests (PR) - 22 Instructions

Accept -- Please select an action -- Take Action Check Spelling Print Save Cancel

Project:	*mailor 8-27	Project Number:	
Process Document:	PR - 22 Show History Current Actors	Overall Due Date:	
Current Workflow Step:	CM or Contractor Prepares Proposal Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="training guide"/>		
Status:	Submitted		

Details **Comments (0)** Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

Comment ▾

There are no comments for this process.

Request Comment Comment

-- Please select an action -- Take Action Check Spelling Print Save Cancel

Add Comment

Add Comment Check Spelling Cancel

Process:	Proposal Requests #22 : training guide
* Comment :	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

- 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"

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

-- Please select an action -- Take Action Check Spelling Print Save Cancel

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

Proposal Requests (PR) - 22 Instructions

Accept -- Please select an action -- Take Action Check Spelling Print Copy Save Cancel

Project:	*mailor 8-27	Project Number:	
Process Document:	PR - 22 Show History Current Actors	Overall Due Date:	
Current Workflow Step:	Initiator Review (PR) Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="training guide"/>		
Status:	Submitted		

- Details Comments (0) Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Commitment Change Details

Commitment:	CCA-3 - Vendor - Test Vendor Submit	Company:	Test Contractor
Status:	Draft		
Created:	02.07.2017 (mm ae ae)		
* Date Of Change:	<input type="text" value="02.07.2017"/>	* Reason Code:	<input type="text" value="Data Entry Revision (Original)"/>

2. Adding Commitment Change Items
 - a. Click on the “Add All Existing Items”

Commitment Change Items [Download Schedule of Values Template](#) Import Schedule of Values Manage Funding Add All Existing Items Add Existing Item

There are no Commitment Change Items

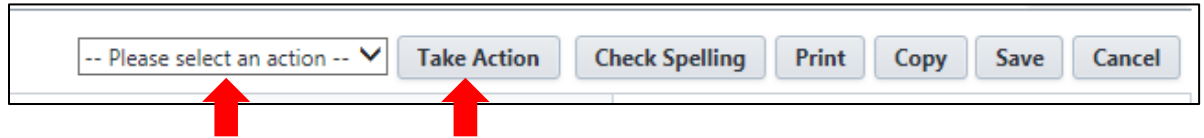
[Cost Summary](#) | [Commitment Details](#)

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

Commitment Change Items [Download Schedule of Values Template](#) Import Schedule of Values Manage Funding Add All Existing Items Add Existing Item

Description	Budget Line Item	Funding Rule	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount	Custom Field(s)
New Building Construction	05.5200	Custom	5.00	10,000.00	0.00	10,000.00	
				10,000.00	0.00	10,000.00	

- 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.

Proposal Requests (PR) - 15 Delete Instance Workflow Override All Fields View Instructions

-- Please select an action -- Take Action Check Spelling Print Copy Save Cancel

Project:	*mailor 8-27		
Process Document:	PR - 15 Show History Current Actors		
Current Workflow Step:	PM Review of Proposal Show Workflow Diagram		
* Subject:	test spawn 3		
Status:	Submitted		

- 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.

Details Comments (0) Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

REMINDER

SELECT THE "**ADD ALL EXISTING ITEMS**" BUTTON UNDER THE COMMITMENT CHANGE ITEMS SECTION. **THEN ENTER THE APPROPRIATE CONTRACT CHANGE AMOUNT IN THE GOLD COMMITMENT "CHANGE AMOUNT" COLUMN.**

THEN FROM THE "**TAKE ACTION**" DROP-DOWN, SELECT "**ACCEPT PRICE**"

Commitment Change Details

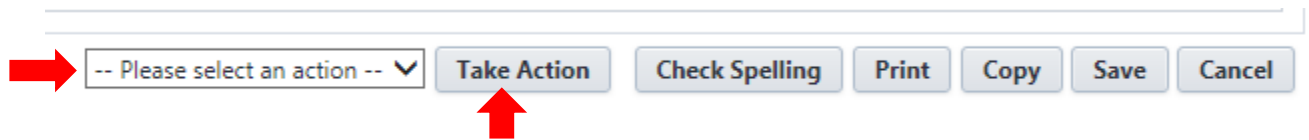
Commitment: CCA-10 - test for CCD process	Company: Test Contractor
Status: Draft	
Created: 09.26.2016 (mm ae ae)	
* Date Of Change: 09.26.2016 <input type="text"/>	* Reason Code: Data Entry Revision (Original) <input type="text"/>

Commitment Change Custom Fields

PO Number:	<input type="text"/>
Transaction ID:	<input type="text"/>
Transaction Date:	<input type="text"/>

Commitment Change Items
[Download Schedule of Values Template](#) [Import Schedule of Values](#) [Manage Funding](#) [Add All Existing Items](#) [Add Existing Item](#)

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.