



STATE OF NEW JERSEY

**SCHOOLS DEVELOPMENT AUTHORITY**

## **Section 28**

# **Contractor Proposal (CP)**

**ORACLE** Primavera

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## I. CHANGE MANAGEMENT

Going forward, General Contractors (GC) and Architects (A/E) will be contractually required to use the SDA Contract Management system. In the meantime, it is the responsibility of the PMF/CM to use the system. This may require direct data entry of GC and A/E related information. This may also be delegated to the GCs and A/Es if possible.

Change documents in Contract Management will include:

1. Request for Information (RFI)
2. Contract Change Request/Authority (CCR/A)
3. Contractor Proposal (CP)
4. Authority Agent Recommendation (AAR)
5. Change Order (CO)
6. Construction Change Directive (CCD) (Covered in Section 31)
7. Contractor Claim Notice (CCN) (Covered in Section 8)

Any of the phases of change management as they have been defined can be skipped if they are inappropriate considering the circumstances around the change.

As the person who certifies that all necessary procedures have been followed and signatures obtained, the Project Manager (PM) will also be the person best able to determine whether all phases of the change management process will need to be utilized in any given case.

### SPECIAL NOTES:

- a. All Change Orders for E-Rate contracts should be entered into Contract Management. They will be automatically updated in the SIMS (Schools Information Management System) Accounts Payable system.
- b. Change Orders, Task Orders and Amendments that are not related to Design/Construction/E-Rate/CM Contracts will be updated automatically in Contract Management on a daily basis. This includes Real Estate and other types of contracts that are not directly managed in Contract Management.
- c. All documents default to a status of **New Item** when they are created. As they flow through the Change Management process, their status will automatically change to **Closed**. However, a status of **Cancelled** is available to be selected manually. A Cancelled status indicates that the document is no longer required, but should be retained for historical purposes. A cancelled document cannot be reopened for processing.
- d. There are two items in the **Review Status** section that we are currently not using. The first is a check box labeled **Do not check or this document will need to be deleted**. Do not check this box. The second is **Document Owner**, relating to functionality we are currently not using.

## II. INITIATING A CHANGE MANAGEMENT DOCUMENT FROM ANOTHER DOCUMENT

**Note:** This document assumes that the A/E is online and has a login to Contract Management. If necessary the PMF/CM can follow the steps listed, attaching documentation and setting document status for tracking purposes.

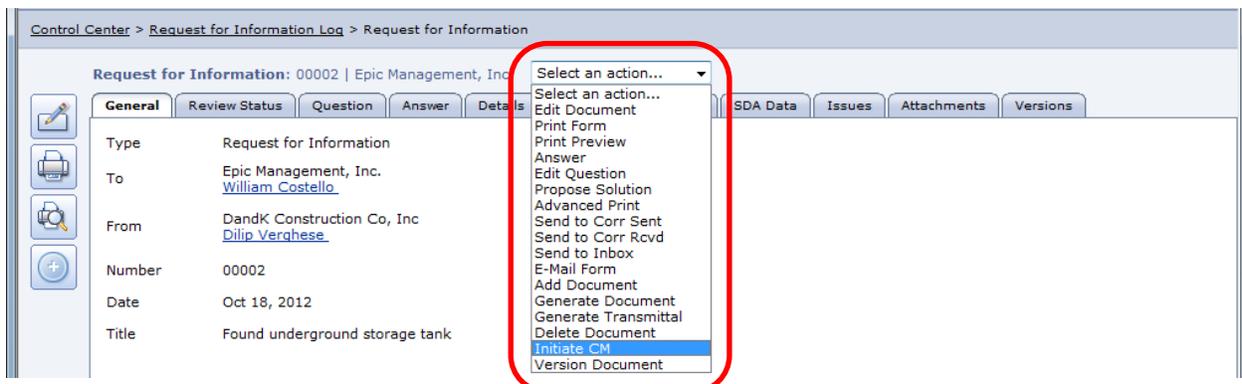
All details regarding the change can be viewed from the master **Change Management** document. Each phase of change management going forward is initiated from the master Change Management document. As each of the supporting documents (Contract Change Request/Authority, Contractor Proposal, Authority Agent Recommendation, Change Order, Construction Change Directive) is completed, it is closed to editing and a link to it is created on the master Change Management record.

**IMPORTANT:** Never change the status of the master Change Management document. A change to the status on this main document will flow down to all linked documents, resulting in status changes to documents potentially still in review.

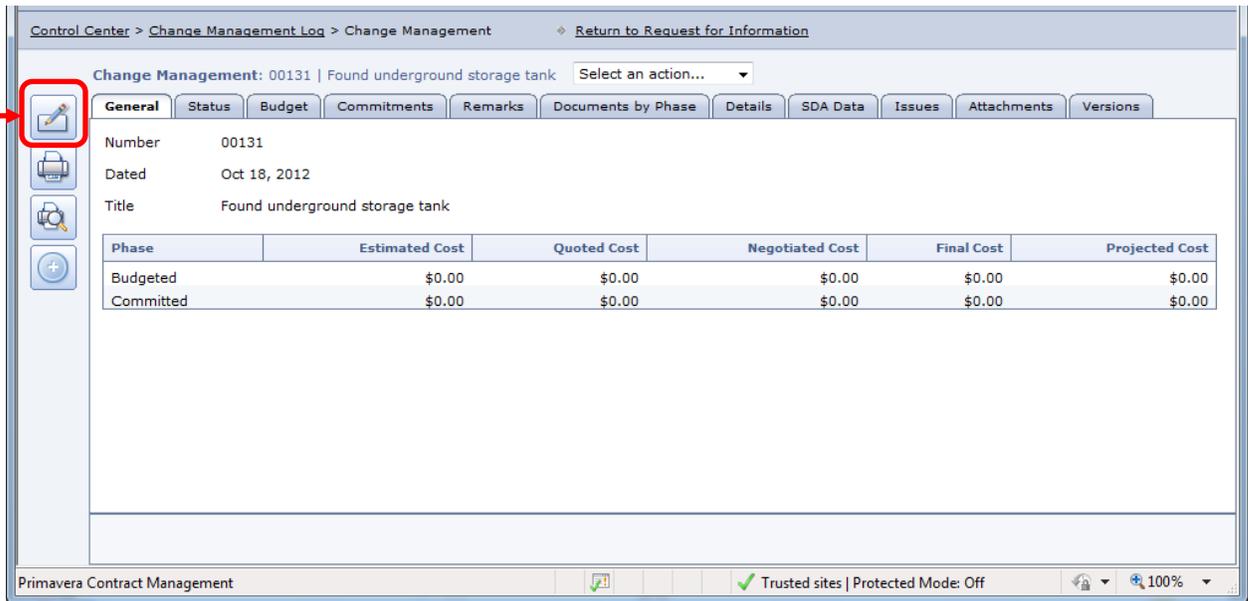
**NOTE:** This example shows initiating Change Management from an RFI. If you are beginning from this point, perform the following steps to open the RFI:

- *Log in to Contract Management*
- *Locate your project from the project list*
- *Choose the Communication folder*
- *Locate your desired RFI from the log and open in edit mode*

1. With the RFI open, click the **Select an Action** menu on the top of the screen and click **Initiate CM**.

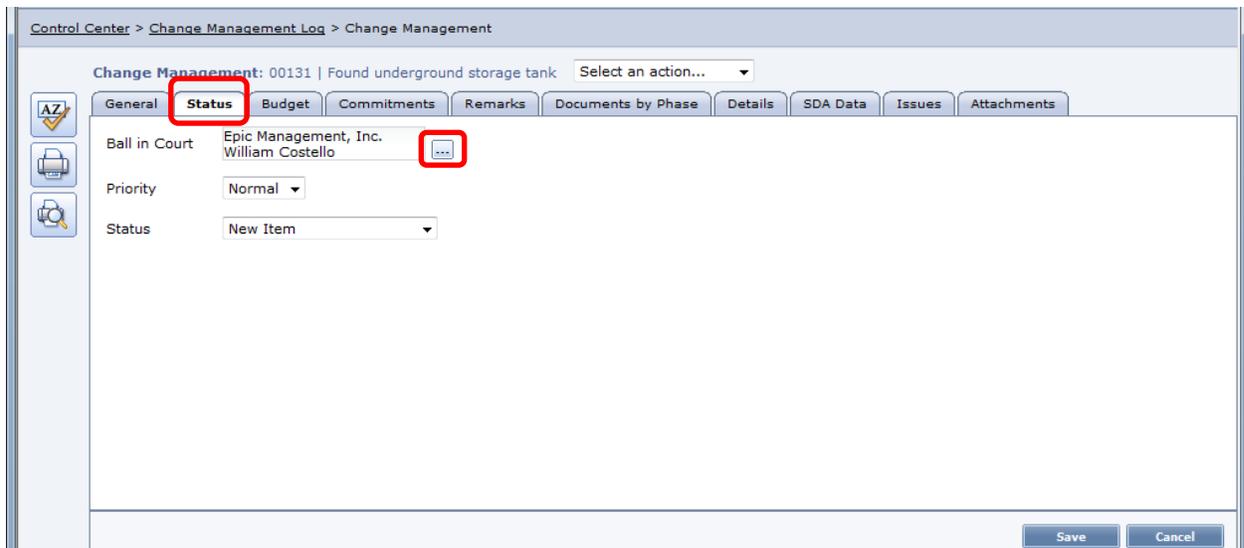


2. The master **Change Management** document displays. If necessary, click the **Edit document** icon to begin editing this document.



**Important:** Contract Management will provide the next available Change Management number for this document during the creation process. **Do not** change this assigned number.

3. Click the **Status** tab. Although the **Ball in Court** field has been automatically populated from the RFI, it is important to change it as this document will not be forwarded for review. Only the documents it holds will be forwarded for review. Click the **select** link next to the field and choose **To Be Determined** from the contact list.



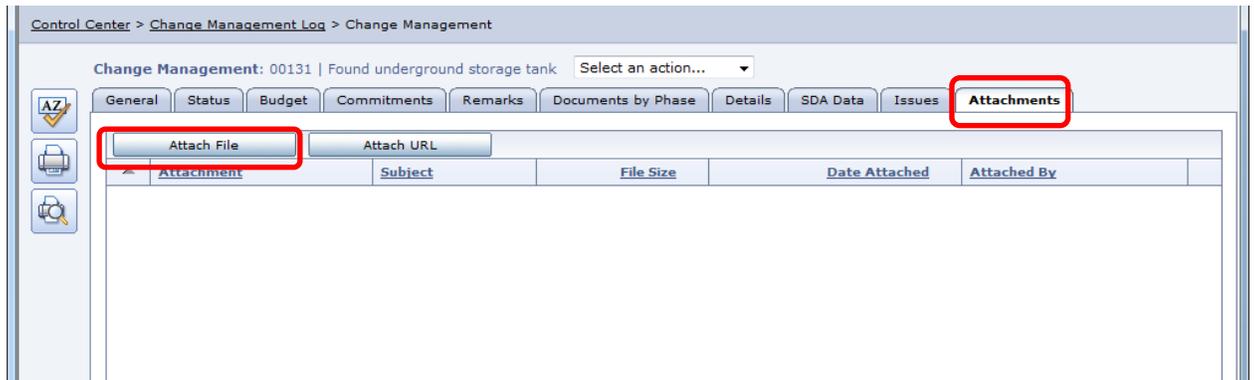
- Click the **Details** tab and select the **Reason for Change** from the drop down list.

The screenshot shows the 'Change Management' interface for item 00131, 'Found underground storage tank'. The 'Details' tab is selected and highlighted with a red box. A dropdown menu for 'Reason for Change' is open, showing the following options: Owner-Initiated Change, Diff. Site Conditions, Delay - CLAIMS ONLY, Design Consult E/O(COs), and GC Error (Amendments). A red arrow points to the dropdown menu. The interface includes tabs for General, Status, Budget, Commitments, Remarks, Documents by Phase, Details, SDA Data, Issues, and Attachments. A 'Save' button and a 'Cancel' button are visible at the bottom right.

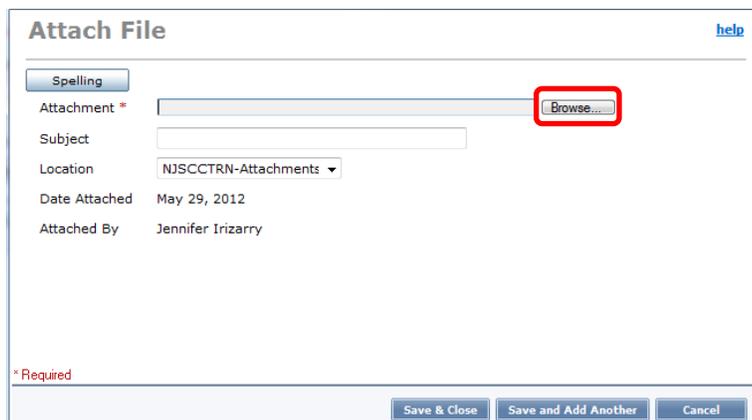
- Click the **SDA Data** tab and complete the **Justification** field. Please note that this field must be updated any time the justification is modified.

The screenshot shows the 'Change Management' interface for item 00131, 'Found underground storage tank'. The 'SDA Data' tab is selected and highlighted with a red box. The 'Justification' field is filled with the text: 'To provide approval for removing the underground storage tank that was discovered during construction'. Below the field are input fields for 'CCD Justification' and 'DCD Justification'. A section titled 'FOR CMD USE ONLY' contains a checkbox and input fields for 'Program Operations Team', 'Contract Number', 'Change Order Type', and 'Change Order / Amendment Number'. The 'Program Operations Team' and 'Change Order Type' fields have red 'X' icons next to them. A 'Save' button and a 'Cancel' button are visible at the bottom right.

- To attach additional information, click the **Attachments** To attach supporting documentation, click the **Attach File** button.



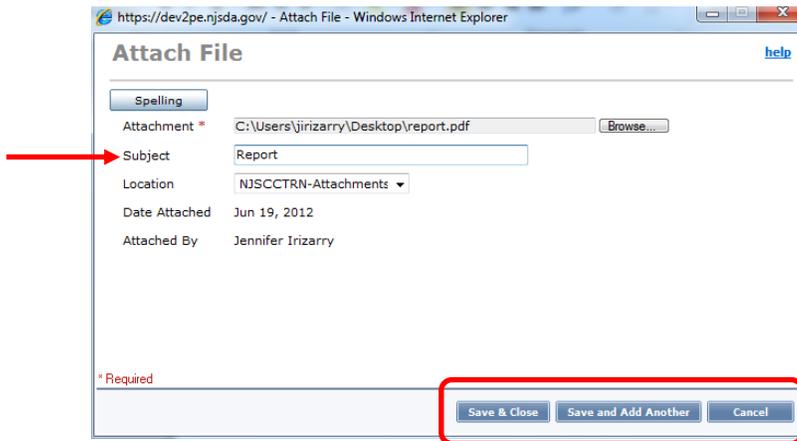
- Click the **Browse** button to navigate to the document you wish to attach.



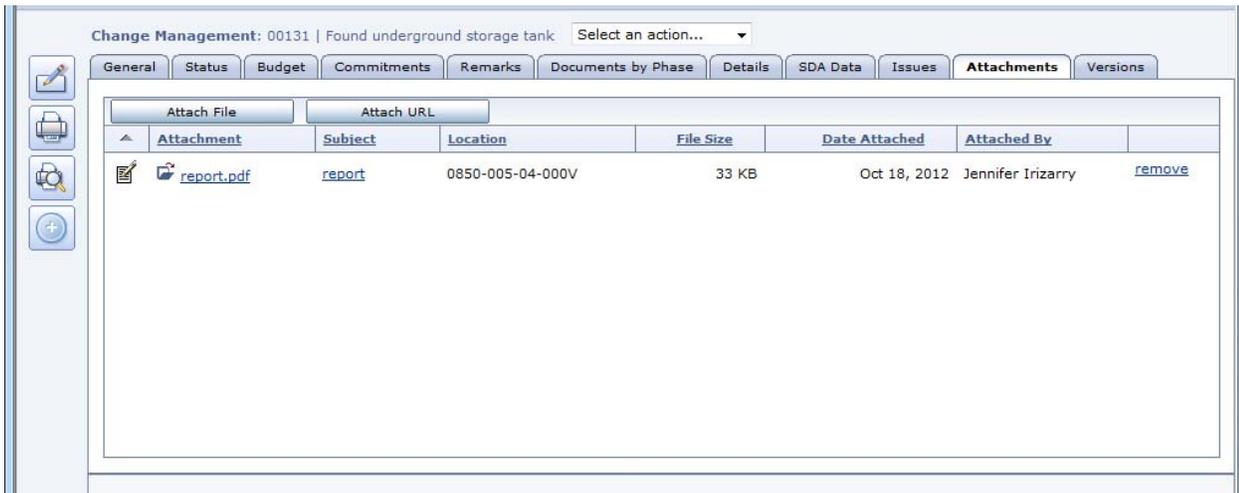
- The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



9. Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



10. The attached file displays in the **Attachments** section.



**Note:** All documents attached to the master **Change Management** document will be copied to the subsequently created supporting documents.

11. When all fields on the document are completed, click the **Save** button at the bottom of the document window.

Control Center > Change Management Log > Change Management

Change Management: 00131 | Found underground storage tank | Select an action...

**General** | Status | Budget | Commitments | Remarks | Documents by Phase | Details | SDA Data | Issues | Attachments

Number \* 00131

Dated Oct 18, 2012

Title Found underground storage tank

Phase	Estimated Cost	Quoted Cost	Negotiated Cost	Final Cost	Projected Cost
Budgeted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

\* Required

Save Cancel

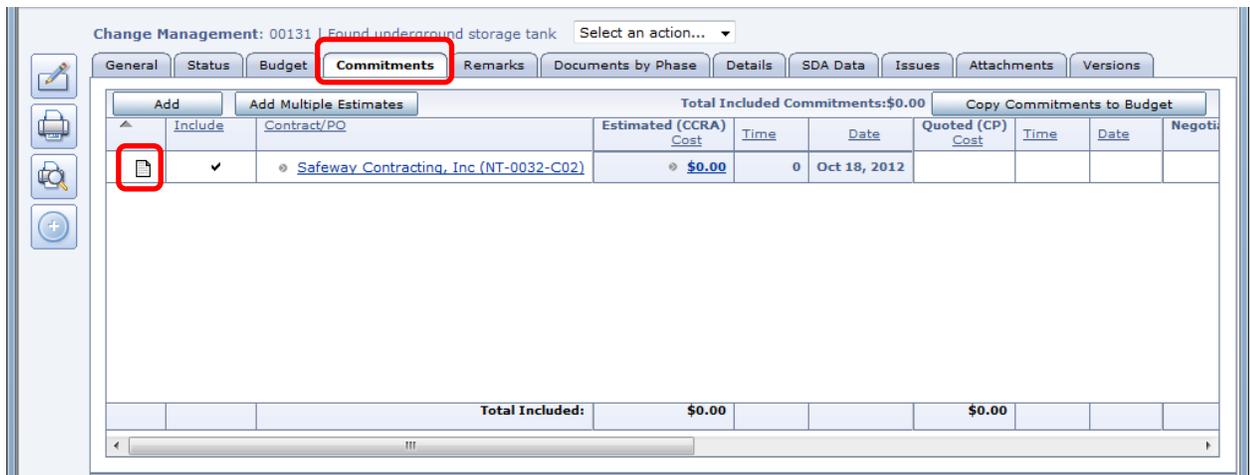
### III. CREATING THE CONTRACTOR PROPOSAL (CP)

After reviewing the documentation the GC will provide his estimate and forward to the PMF/CM for entry in Contract Management.

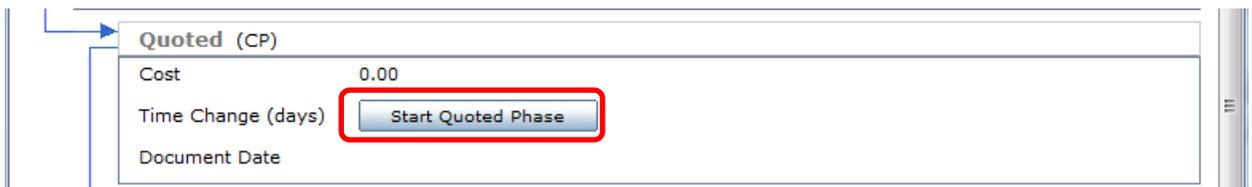
**NOTE:** *If you are beginning from this point, perform the following steps to open the Change Management document:*

- **Log in to Contract Management**
- **Locate your project from the project list**
- **Choose the Change Order Management folder, then choose Change Management**
- **Locate your desired Change Management document from the log and open in edit mode**

1. In the master **Change Management** document, click the **Commitments** tab, then click on the **Edit document** icon next to the existing line item to initiate the next phase of change management. Note: If this is a new Change Management record with no existing line item, click the **Add** button.



2. Click on the **Start Quoted Phase** button (which is the Contractor Proposal).



3. A **Contractor Proposal (CP)** displays. Complete the information in the following tabs:

### A. General Tab

The **To** and **From** fields on the General tab will need to be edited in order to display the proper contact information. The CP should be sent *To* the PMF/CM *From* the GC. Click the **Select** button next to the field to select the names from the contact list.

Control Center > Proposals Log > Contractor Proposal    Return to Change Management

Contractor Proposal: 00001 | New Jersey Schools Development Auth    Select an action...

General    Status    Summary    Line Items    Details    Schedule    SDA Data    Issues    Attachments

Type \*    Contractor Proposal

Contract \*    Construction (NT-0032-C02)

To \*    New Jersey Schools Development Auth  
Kimberli Banegas

From \*    Safeway Contracting, Inc  
Cara Greeley

Number \*    00001

Title    Found underground storage tank

Date    Oct 19, 2012

Total Cost    \$0.00

Time Change (days)    0

\* Required

Save    Cancel

**IMPORTANT:** *This is the only opportunity you will have to select the To/From company. Once you save the document, you will not be able to edit the company, only the contact names.*

### B. Status Tab

Click the **Status** tab and check the name in the **Ball in Court** field. This name should be the same as the To field. If necessary, click the **select** button next to the field to select the correct name from the contact list.

Control Center > Proposals Log > Contractor Proposal    Return to Change Management

Contractor Proposal: 00001 | New Jersey Schools Development Auth    Select an action...

General    Status    Summary    Line Items    Details    Schedule    SDA Data    Issues    Attachments

Ball in Court    Epic Management, Inc.  
William Costello

Priority    Normal

Status    New Item

Acknowledged by

Company    Epic Management, Inc.

Contact    William Costello

Approved Date

Acknowledged by

Company    DandK Construction Co, Inc

Contact    Dilip Verghese

Save    Cancel

## C. Details Tab

Click the **Details** tab and enter instructions/comments from the GC in the **Description** field (either delete the information which is included from previous phases, or insert your instructions above it).

The screenshot shows the 'Contractor Proposal' details for proposal 00001. The 'Details' tab is selected and highlighted with a red box. The 'Description' field contains the text: 'Estimate from GC attached' and 'Your estimate for this change is requested'. A red arrow points to the 'Description' field. Other fields include 'Spec Section', 'Cost Category' (Commitment), 'Cost Type' (Pending), 'Required Date' (Oct 26, 2012), 'Acknowledged Date', 'Previous Change Management Phase' (Found underground storage tank (00001)), and 'Change Management Number' (Found underground storage tank (00131)).

## D. Line Items Tab

1. Click the **Line Items** tab and choose the edit icon next to the line item.

The screenshot shows the 'Contractor Proposal' line items for proposal 00001. The 'Line Items' tab is selected and highlighted with a red box. The table below shows one line item with an edit icon (a pencil) next to it, also highlighted with a red box.

Line Item No.	Quantity	Units of Measure	Description	Unit Price	Net Amount	Tax Rate	Sales Tax	Line Item Total
00001					\$0.00	0.00000	\$0.00	\$0.00
<b>Grid Totals:</b>	<b>0.00</b>				<b>\$0.00</b>		<b>\$0.00</b>	<b>\$0.00</b>

2. Enter the GC's estimate in the **Lump Amount** field. When you click off of the field, notice that the dollar value is automatically populated in the cost code field.

**Lump Sum** [ << Previous ] [ Next >> ] [help](#)

Spelling

**Change Proposal Unit**

Type Lump Sum

Line Item No. \* 00001

Description

Lump Amount (\$) 240,000.00

Tax Rate 0.00000

Sales Tax (\$) 0.00

Line Item Total (\$) 240,000.00

Material Name ... X

Material Title

Activity ID ... X

Costing [top of page](#)

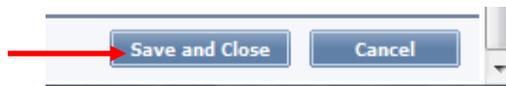
Cost Code	Title	Distributed
030	Construction	240,000.00 add balance <a href="#">remove</a>

Issues [top of page](#)

Attachments [top of page](#)

\* Required

3. When completed, scroll to the bottom of the **Lump Sum** window and click **Save and Close**.



## E. SDA Data Tab

Contractor Proposal: 00001 | Epic Management, Inc. Select an action...

General Status Summary Line Items Details Schedule **SDA Data** Issues Attachments

Construction Change Directive

Is this Document an Amendment?  ... X

Is this Request > 75,000?  ... X

Save Cancel

- **Construction Change Directive** – click the checkbox if this CP relates to a Construction Change Directive document
- **Is this Document an Amendment?** – if this CP is part of an amendment, click the select button next to the field and choose the **Yes** option to indicate that this information must be e-mailed to the Contract Management Division (CMD)
- **Is this Request >75,000?** – if the value of this document is greater than \$75,000, click the select button next to the field and choose the **Yes** option to indicate that this information must be e-mail to the Contract Management Division (CMD)

## F. Attachments Tab

To attach additional supporting documentation, click the **Attach File** button. Note that any documents that were attached to the Change Management record have carried forward to this phase of change management.

Control Center > Proposals Log > Contractor Proposal [Return to Change Management](#)

Contractor Proposal: 00001 | Epic Management, Inc. Select an action...

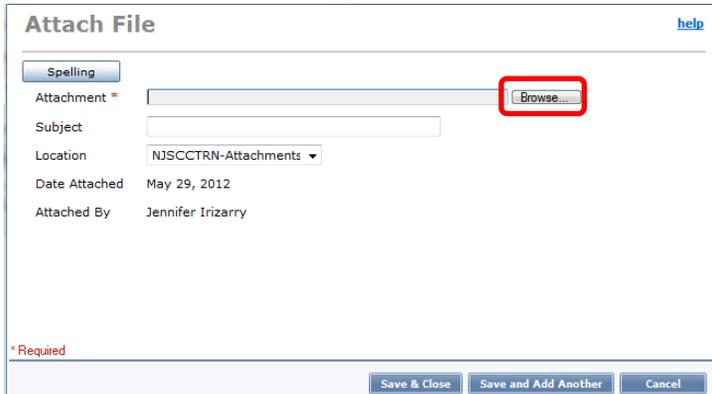
General Status Summary Line Items Details Schedule SDA Data Issues **Attachments**

**Attach File** Attach URL

Attachment	Subject	Location	File Size	Date Attached	Attached By	
report.pdf	report	0850-005-04-000V	33 KB	Oct 19, 2012	Jennifer Irizarry	<a href="#">remove</a>

Save Cancel

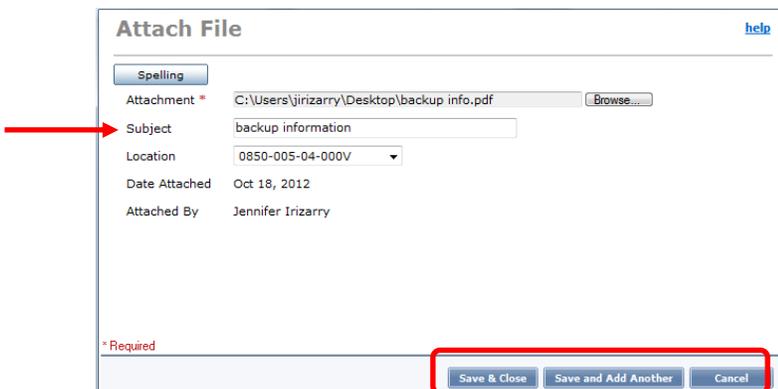
Click the **Browse** button to navigate to the document you wish to attach.



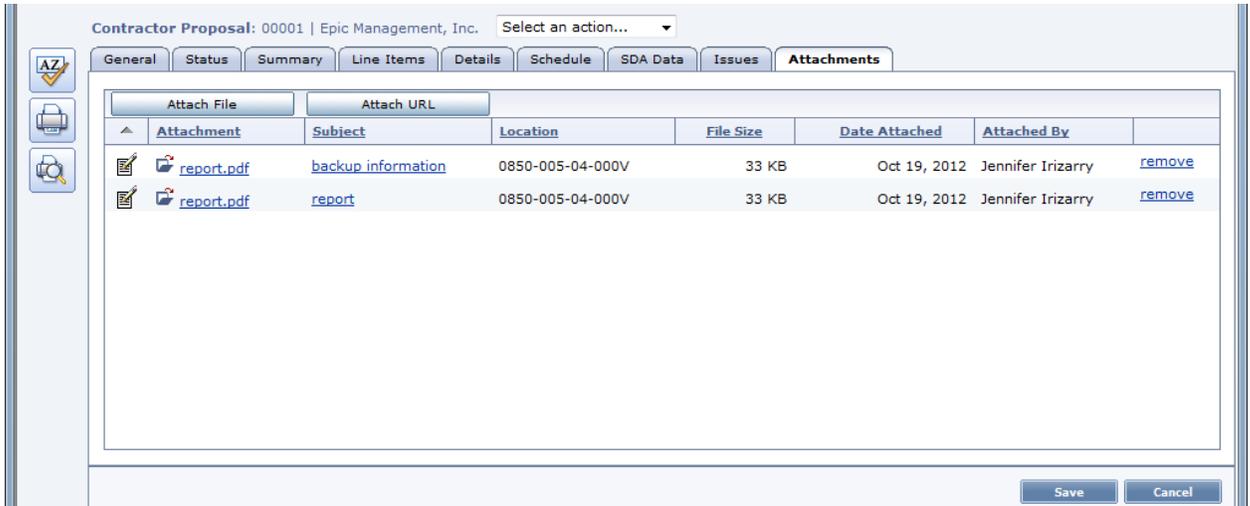
The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



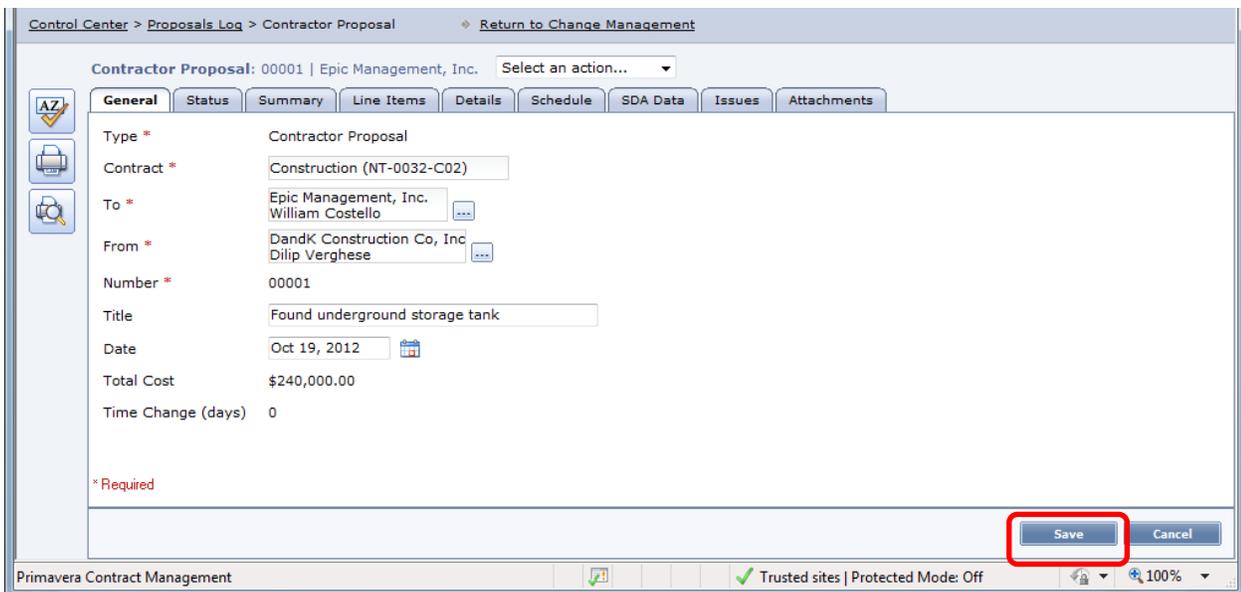
Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



The attached file displays in the **Attachments** section.



When all fields on the document are completed, click the **Save** button at the bottom of the document window.



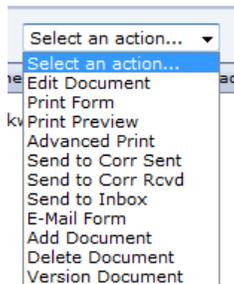
## IV. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

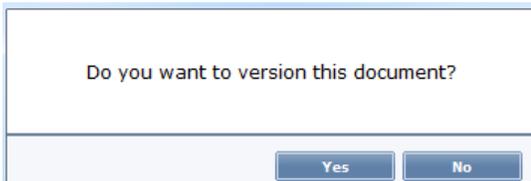
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

### A. Create a Document Version

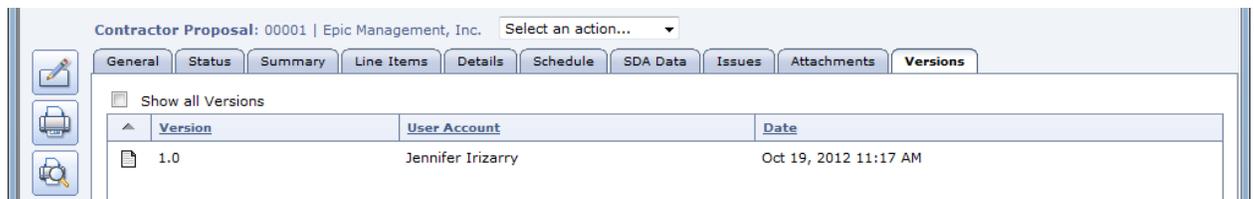
1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



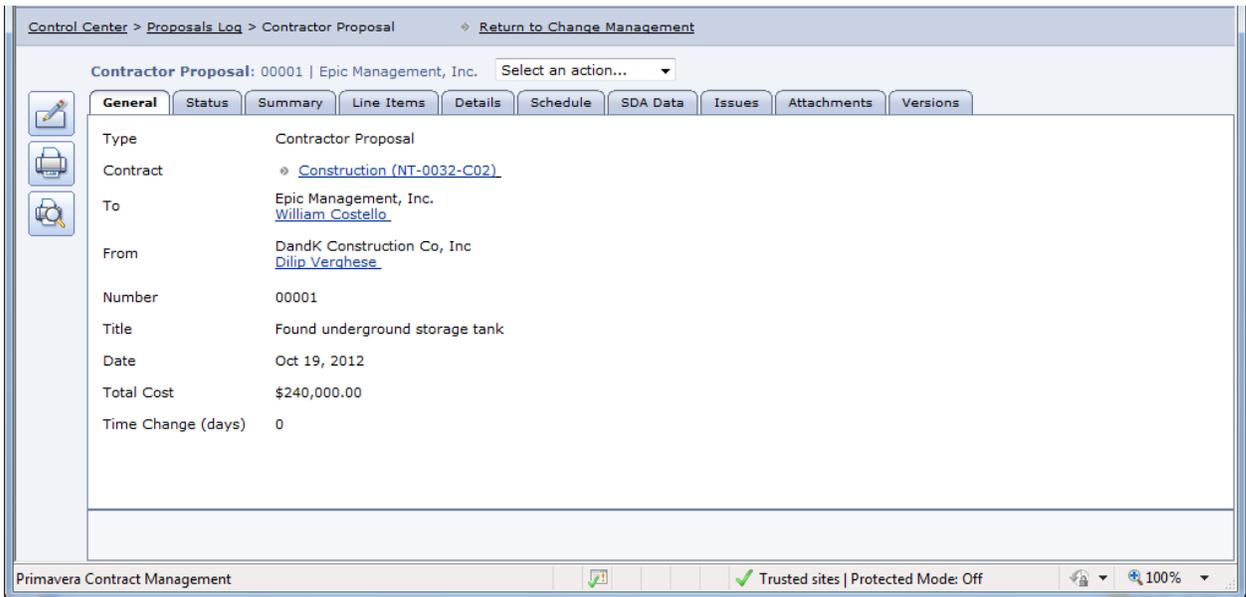
2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.



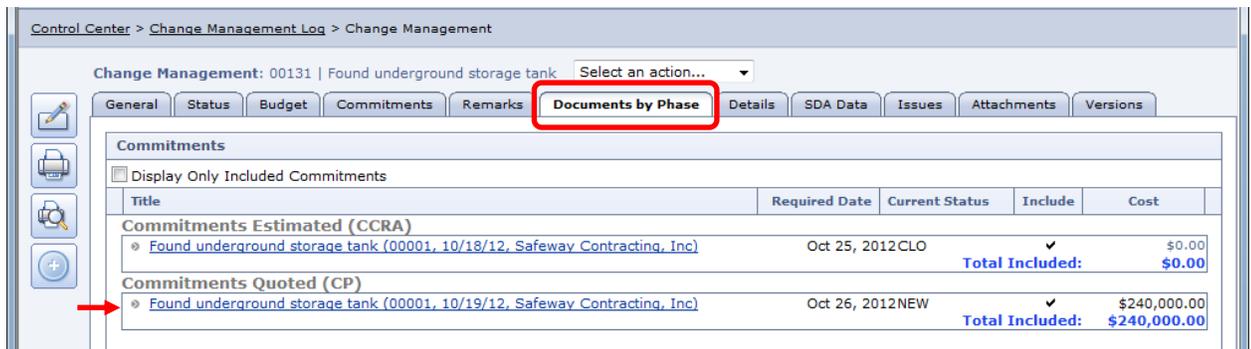
To return to the Change Management document, click the **Return to Change Management** link on the top of the screen.



The line item is now updated on the **Commitments** tab.



You can also click the **Documents by Phase** tab to see the line item updates.

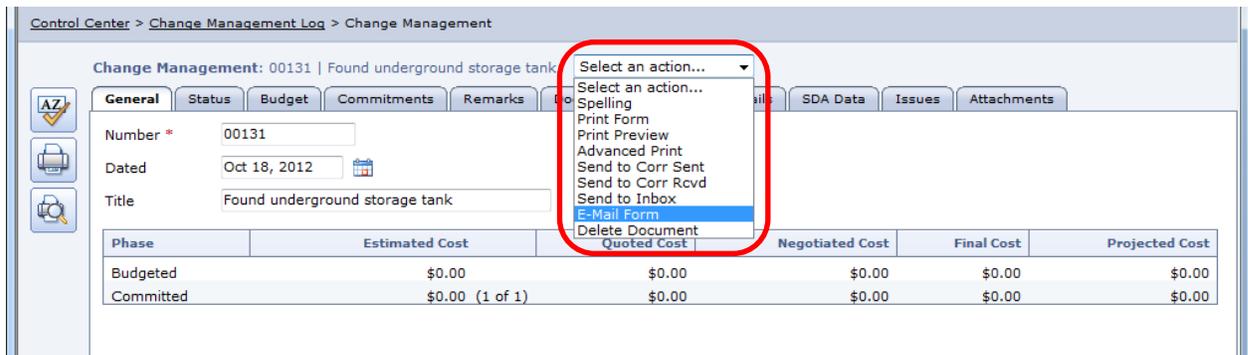


## V. E-MAILING THE SDA'S CONTRACT MANAGEMENT DIVISION (CMD)

If the PMF/CM's estimate of the change value is greater than \$75k, the PMF/CM solicits input from the SDA's Contract Management Division (CMD), forwarding a copy of the master Change Management document via email. Note that any e-mail sent from within Contract Management will automatically be logged in the Correspondence Sent module.

To email the prospective change to the SDA's Contract Management Division:

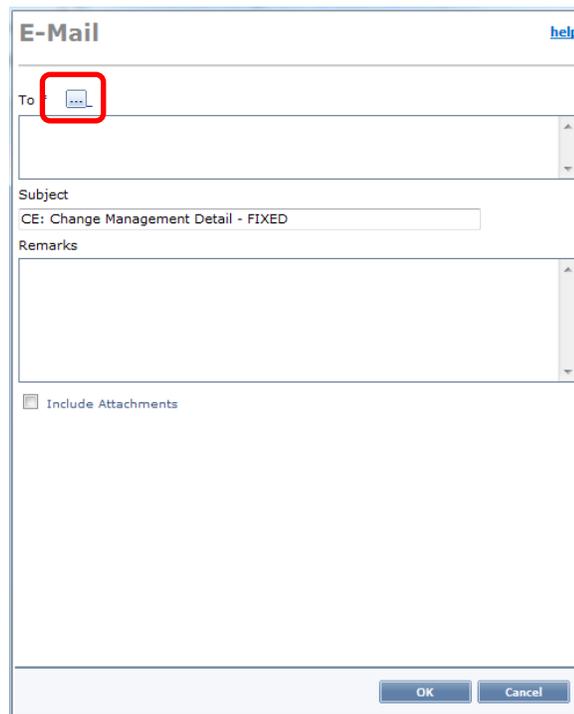
1. With the applicable Change Management document open, choose the **Select an Action** drop-down list on the top of the screen and click **E-Mail Form**.



The screenshot shows the 'Change Management' interface. The title bar reads 'Control Center > Change Management Log > Change Management'. The main content area is titled 'Change Management: 00131 | Found underground storage tank'. There are several tabs: 'General', 'Status', 'Budget', 'Commitments', 'Remarks', 'SDA Data', 'Issues', and 'Attachments'. The 'General' tab is active, showing fields for 'Number \*' (00131), 'Dated' (Oct 18, 2012), and 'Title' (Found underground storage tank). A dropdown menu is open over the 'Select an action...' button, listing options: 'Select an action...', 'Spelling', 'Print Form', 'Print Preview', 'Advanced Print', 'Send to Corr Sent', 'Send to Corr Rcvd', 'Send to Inbox', 'E-Mail Form' (highlighted in blue), and 'Delete Document'. Below the dropdown is a table with columns: 'Phase', 'Estimated Cost', 'Negotiated Cost', 'Final Cost', and 'Projected Cost'. The table has two rows: 'Budgeted' and 'Committed'. The 'Committed' row shows a value of '\$0.00 (1 of 1)' under 'Estimated Cost'.

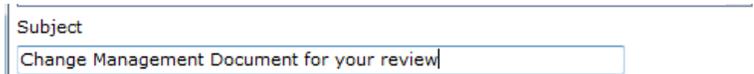
Phase	Estimated Cost	Negotiated Cost	Final Cost	Projected Cost
Budgeted	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00 (1 of 1)	\$0.00	\$0.00	\$0.00

2. Click the **select** button to select **SDA Estimating Unit** (under New Jersey Schools Development Authority) from the contact list. It is also recommend that the sender include their own name in the To field.



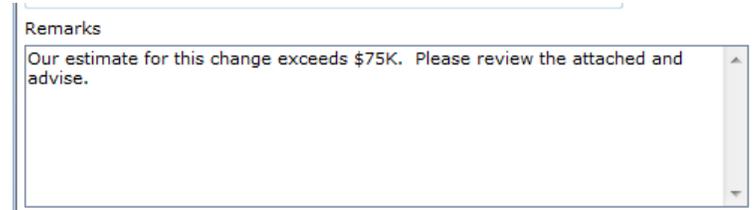
The screenshot shows the 'E-Mail' dialog box. The title bar reads 'E-Mail' with a 'help' link. The 'To' field is highlighted with a red box and contains a 'select' button. The 'Subject' field contains 'CE: Change Management Detail - FIXED'. The 'Remarks' field is empty. There is a checkbox for 'Include Attachments' which is unchecked. At the bottom are 'OK' and 'Cancel' buttons.

3. If desired, change the default **Subject** displayed in the field.



A screenshot of a web form showing a text input field labeled "Subject". The field contains the text "Change Management Document for your review".

4. Enter instructions for CMD in the **Remarks** section of the **E-mail** window.



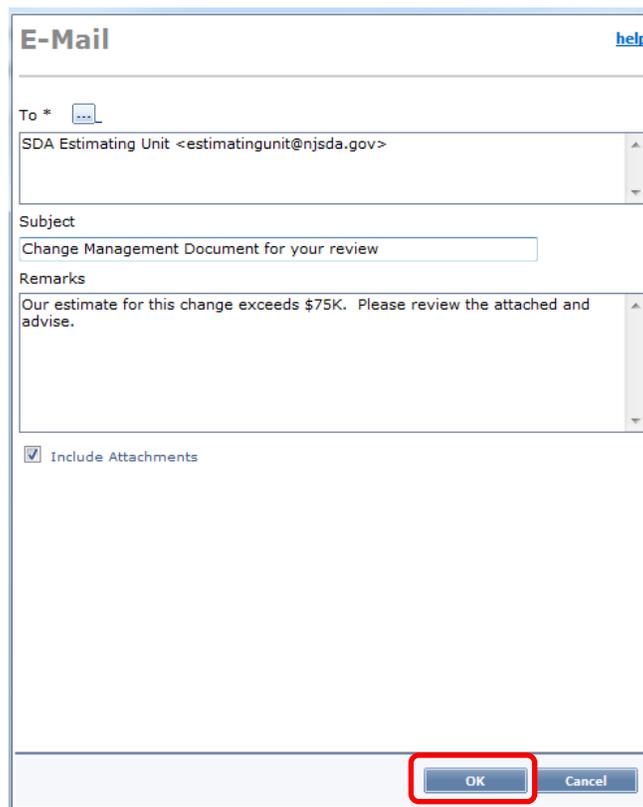
A screenshot of a web form showing a text area labeled "Remarks". The text area contains the text "Our estimate for this change exceeds \$75K. Please review the attached and advise.".

5. Check the **Include Attachments** box at the bottom of the **E-mail** window.



A screenshot of a web form showing a checked checkbox labeled "Include Attachments".

6. Scroll to the bottom of the **E-mail** window and click the **OK** button to submit your e-mail.

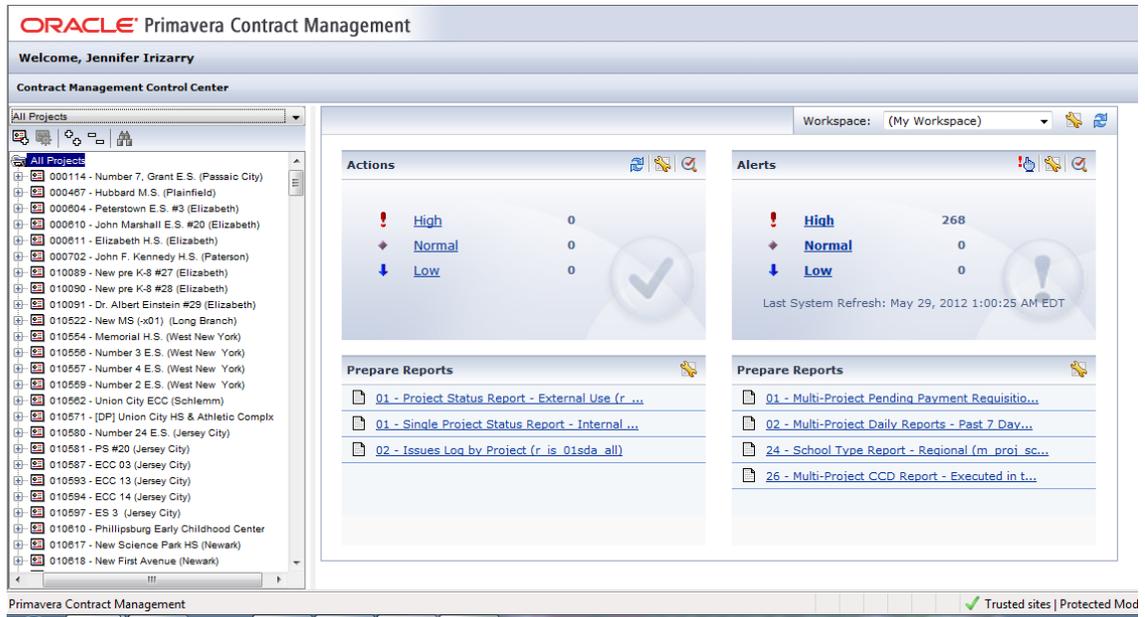


A screenshot of the "E-Mail" window. The window title is "E-Mail" with a "help" link. The "To \*" field contains "SDA Estimating Unit <estimatingunit@njsda.gov>". The "Subject" field contains "Change Management Document for your review". The "Remarks" text area contains "Our estimate for this change exceeds \$75K. Please review the attached and advise.". The "Include Attachments" checkbox is checked. At the bottom right, the "OK" button is highlighted with a red rectangle.

## VI. CREATING A NEW CHANGE MANAGEMENT DOCUMENT WITHOUT A REQUEST FOR INFORMATION

While it is desirable to capture all phases of change management beginning with a Request for Information (RFI), it is recognized that change management can be initiated without it. If you need to initiate change management without having an RFI, perform the following steps:

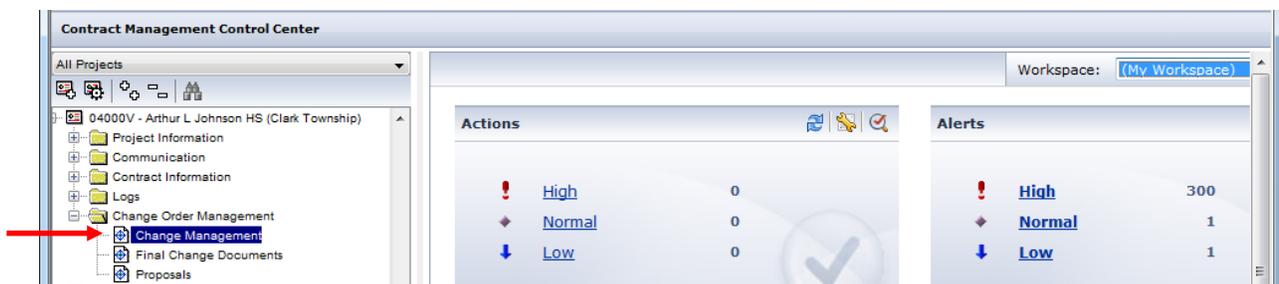
1. Once logged into Contract Management, the Contract Management Control Screen appears (as shown).



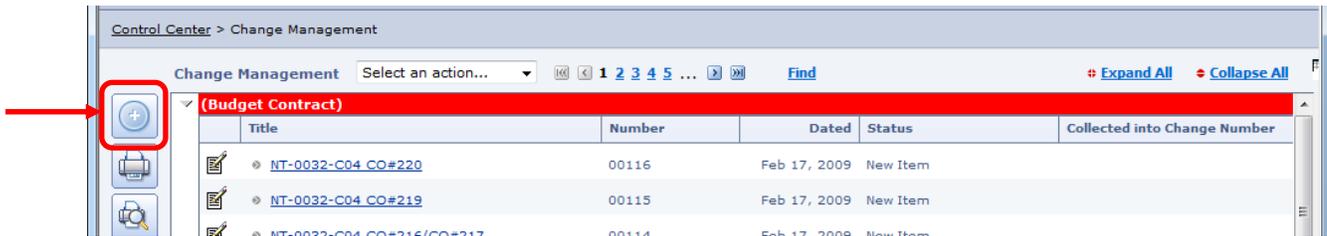
2. Select your desired project.



3. Select the **Change Order Management** folder, and then select **Change Management**.



- When the log view displays, select the **Add Document** button on the left side of the screen to create a new master change management document.



- The new document displays. Contract Management will provide the next available change management number for this document. **Do not change this assigned number.** Adjust the **date** as necessary and enter a **title**. Continue to follow the entry processes as described on page 5.

