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Introduction to Project Controls

The Unifier Project Controls base product provides a platform to create, monitor, and manage your projects. Two preconfigured project templates (Owner and Contractor) provided with Project Controls allows you to manage owner-controlled and contractor-controlled projects. The Contractor template is useful if you are a general contractor working with sub-contractors, vendors, and the owner to manage, monitor, and track projects. While the Owner template is useful if you are in charge of all transactions conducted with contractors and vendors.

A suite of preconfigured business processes (BPs), custom reports, user-defined reports, and dashboards are also available. These BPs are designed and configured for your use. Depending on your permission status, you can access all available BPs using the left-pane User Mode Navigator.

> **Note**: The project administrator can set up the structure of the items in the User Mode Navigator.

Within our documentation, some content might be specific for cloud deployments while other content is relevant for on-premises deployments. Any content that applies to only one of these deployments is labeled accordingly.

> **Note**: The instructions and information presented in the Unifier documentation is based on an out-of-the-box setup and before being customized by the user.

Downloading and Configuring Project Controls

You will find the configuration packages in **My Oracle Support**:

1) Go to http://support.oracle.com and sign in.
2) Select the **Patches & Updates** tab.
3) In the **Patch Search** block select the **Product or Family (Advanced)** tab, on the left hand side.
4) In the **Product** field enter **Primavera Unifier** .
5) From the **Release** field select the relevant configuration package (Primavera Unifier Configuration Packages x.x) and click **Search**. If the configuration package require a minimum version of Unifier, then it will appear under a general release number, for example, 18.x, 19.x.
6) Under the list that the system returns, select the appropriate configuration package, based on your current version of Unifier.
7) Once you have downloaded the configuration package, you can proceed with importing it to Unifier. Refer to the *Unifier Administration Guide* for more details on how to import the configuration package.

Configuring Project Controls Base Product

Access to Unifier functionality is granted through permissions. The ability to utilize a specific function in Unifier depends on permissions settings. Refer to the *Unifier Administration Guide* (Importing Configuration Packages) for information about the Business Processes permission settings necessary for the users and groups.

Components of Project Controls

With the Project Controls base product, you receive the following components:

- Two preconfigured templates (Owner and Contractor)
- Selected platform structure to support the included business processes and shells: See the ***Administrator Mode Navigator Structure*** (on page 23) section in this guide.
- A suite of business processes that work together to accomplish the tasks: Preset company-level and project-level groups to which you will assign users.
- A suite of reports to keep you abreast of project status: See the ***Administrator Mode Navigator Structure*** (on page 23) section in this guide.

Notes:

- The instructions in this guide are only applicable if you have prepared and configured the necessary data that you need for using the Project Controls base product.
- Before using the Project Controls base product, check with your Administrator to ensure that your Administrator has created a "Projects" shell using the PROJECT TEMPLATE (**Templates** > **Shells** > **Projects** > **Owner Template** or **Contractor template**).
- Before you continue, set your preferences in Unifier. Refer to the *Unifier User Guide* for details.

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About the Owner Template

Business Processes

The Owner template has the following predefined BPs:

- Areas
- Specification Sections
- Estimates
- Fund Appropriations
- Initial Budget
- Budget Changes
- Budget Transfers
- Requests for Bid
- Contracts

- Notices to Proceed
- Potential Change Orders
- Payment Applications
- Work Releases
- Purchase Orders
- PO Amendments
- Invoices
- Payments
- Journal Entries
- Risks and Issues
- Change Orders
- Architect/Engineer Daily Observations
- Architect's Supplemental Instructions
- Design Change Requests
- Design Reviews
- Submittal Packages
- Submittals
- Submittal Revisions
- Requests for Information
- Requests for Substitution
- Drawing Sets
- Drawings
- Drawing Revisions
- Action Items
- Meeting Minutes
- Transmittals
- Daily Reports
- Incident Reports
- Monthly Updates
- Lessons Learned
- Project Closeout
- Punch Lists
- Warranties

Custom Reports

The following Custom Reports are available in the Owner template:

- Contract Summary
- Contract Summary with Actuals
- Cost Report
- Daily Reports
- Design Reviews
- Items Overdue

- Monthly Updates
- Risks and Issues
- Task Due within 7 Days

Dashboard

The following Dashboards are available with the Owner template:

- Contracts: Contracts by Status, Change Order by Status, Change Orders by Reason, and Payment Application Amounts by Status.
- Purchase Orders: Purchase Orders by Status, Purchase Orders by Vendor, PO Amendments by Status, and Invoices by Status
- Risks/Issues & Cost Sheet : Risk & Issues by Category (Value) and Risk & Issues by Category (Count)
- Submittals & RFIs: Submittals by Status, Submittals by Number of Revisions, Requests for Information by Status, and Requests for Information by Category
- Action Items & Incidents: Action Items by Status, Action Items by Assignee, Incident by Type, and Incidents by Accident Source

About the Contractor Template

Business Processes

The Contractor template has the following predefined BPs:

- Areas
- Specification Sections
- Estimates
- Budget Items
- Payment Applications to Owner
- Requests for Bid
- Contracts
- Notices to Proceed
- Payment Applications
- Work Releases
- Purchase Orders
- PO Amendments
- Invoices
- Payments from Owner
- Payments
- Journal Entries
- Risks and Issues
- Potential Changes
- Change Orders
- Budget Change Orders

- Design Change Requests
- Design Reviews
- Submittal Packages
- Submittals
- Submittal Revisions
- Requests for Information (RFI)
- Subcontractor Requests for Information
- Requests for Substitution
- Drawing Sets
- Drawings
- Drawing Revisions
- Action Items
- Meeting Minutes
- Transmittals
- Daily Reports
- Incident Reports
- Monthly Updates
- Lessons Learned
- Project Closeout
- Punch Lists
- Warranties

Custom Reports

The following Custom Reports are available with the Contractor template:

- All Projects Contract Summary
- All Projects Contract Summary with Actuals
- All Projects Cost Report
- All Projects Daily Reports
- Contract Summary
- Contract Summary with Actuals
- Cost Report
- Daily Reports
- Design Reviews
- Items Overdue
- Monthly Updates
- RFIs
- Risks and Issues
- Task Due within 7 Days

Dashboard

The following Dashboards are available with the Contractor template:

- Contracts: Contracted Amounts by Contract Status, Counts of Contracts by Status, Change Order Amounts by Status, and Payment Application Amounts by Status
- Cost Sheet Summary
- Risks & Issues: Costs of Risk & Issues by Category and Count of Risk & Issue Items by Status
- Submittals & RFIs: Count of Submittals by Status, Count of Submittals by # of Required Revisions, Count of RFIs from Subcontractors by Reason, and Count of RFIs to Owner by Reason
- Action Items & Incidents: Count of Action Items by Assignee and Incident by Accident Source

Groups

The following groups are created at the Company, All Projects, and Project levels:

Company Level Groups

- All Company Users
- All Project Coordinators
- Company Administrators
- Contract Coordinators
- Project Request Reviewers
- Timesheet Reviewer
- Vendor Coordinators

All Projects Level Group

- Project Administrators
- Submittal Coordinators

Project Level (Owner template and Contractor template)

- All Project Users
- Architects/Engineers
- Customer
- Discipline Leads
- Document Controllers
- Project Administrators
- Project Coordinators
- Project Manager
- RFI Coordinators
- Subcontractors
- Submittal Coordinators

Administrator Mode Navigator Structure

The following nodes contain necessary components and are available for Project Controls.

- uDesigner
- Data Structure Setup
- Access Control
- User Administration
- Configuration
- Standards & Libraries
- Company Workspace
- Templates or Shell Templates
- Reports

You can use these nodes to make other changes to the Project Controls business process forms, workflows, rules, cash flows, data cubes, and data structure; however, we do not recommend using these features until you are familiar with Primavera Unifier and how it works.

The following sections provide information about each node (and their respective modules) that have been set up for Project Controls operation.

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uDesigner

You can access the uDesigner node from the Company Workspace tab (Administration Mode), if you have the appropriate permissions.

> **Note**: The uDesigner node is a design tool for those customers who want to create and publish their own customized shells, managers, and business processes. This guide explains the features of the business processes that have been set up for Project Controls operation and does not include instructions on how to use the uDesigner node. Refer to the *Unifier uDesigner User Guide* for detailed instructions on how to use the uDesigner node.

The uDesigner node contains the following modules that have been set up for Project Controls operation:

- Business Process
- Cost Manager
- Resource Manager
- Schedule Manager
- Shell Manager
- Portfolio Manager

The modules are designed and set up for use with Project Controls. Refer to the *Unifier uDesigner User Guide* if you need to change the fields in any of the forms within each node or modules.

The following sections provide information about the modules that are included in uDesigner node.

Business Process Module

This module contains a suite of business processes.

Cost Manager Module

This module contains these forms:

- A Cost Attributes form to set up the cost sheet
- A Fund Attributes form to set up funding and the funding sheet

Resource Manager Module

This module contains a Role Attributes form to specify the roles necessary to perform the project work, such as crane operator, industrial crane, or steel.

In the Resource Manager you can create and manage roles that you can assign to schedule sheet activities. A role can be virtually anything, for example, a role can be a job title, or it can be a piece of machinery. Each role can have its own role rate.

The Resource Manager is set up with a role attribute form that is linked to the Schedule Manager for the purpose of populating activities on the Schedule Sheet with roles for the work to be done on the project.

Schedule Manager Module

This module contains these forms:

- An Activity Attributes form (necessary to set up the schedule)
- A Resource Activity form for assigning a resource type and a role to an activity

For the purpose of populating activities on the Schedule Sheet with roles for the work to be done on the project, the Resource Manager is set up with a role attribute form that is linked to the Schedule Manager.

Shell Manager Module

This module contains the following shells:

- An anchor shell called All Projects
- A project shell called Projects

Portfolio Manager Module

This module contains a Capital Projects portfolio and a Capital Planning attribute (detail) form that sets up the manager.

Data Structure Setup

This node contains these modules:

- Data Cube Definitions
- Data Views

You can also use the Data Structure Setup node to make changes to a data cube or data view definition for reports and dashboards. Refer to the *Unifier Administration Guide* for details.

Access Control

Use this node to grant:

- Administrative and user permissions to users and groups
- Permissions to your company users and groups so they can work in different areas in Unifier

User Administration

Use this node to:

- Add users to Unifier and assign users to groups so they have access to Project Controls.
- Access the following groups, which have a set of default permissions, also:
  - All Company Users: To include the user in an umbrella group for Company-level permissions to both the:
    - Document Manager

        - Company-level business processes
    - Company Administrators: To identify the users as company administrators
    - Creator: To identify the users as the creator of a business process, report, etc.
    - Project Administrators: To identify the users as project administrators
    - Reviewer: To identify the users as a reviewers, usually on a workflow step for a business process or a drawing or document in the Document Manager

Configuration

This node, and the following subordinate nodes, contain settings configured for Project Controls:

- Business Processes
- Shell Manager (including All Projects and Projects)
- Portfolio Manager > Capital Projects

The Configuration node also includes the Custom Reports and the User Mode Navigator. You can use the Configuration node to make changes to the configuration of the Business Processes, Shell Manager, and Portfolio Manager. Refer to the *Unifier Administration Guide* for details.

Standards & Libraries

This node, and the following subordinate nodes, contain the following data for Project Controls:

- Cash Flow > Data Sources
- Cash Flow > Distribution Profiles
- Period Structure with a January to December Planning Period

You can also use the Standards & Libraries node to make changes to cash flow data sources, cash flow data distribution profiles, or planning period for the portfolio. Refer to the *Unifier Administration Guide* for details.

Company Workspace

This node, and the following subordinate nodes, contain settings already configured for Project Controls:

- Business Processes
- Report (visible in User Mode)

You can also use the Company Workspace node to make changes to the:

- Setup of company-level business processes
- Automatic update of active-project statuses
- Setup of company-level reports

Refer to the *Unifier Administration Guide* for details.

Templates or Shell Templates

This node, and the following subordinate nodes, contain the following data for Project Controls:

> **Note**: Some of the items are under the Template node and some others are under the Shell Templates.

- Costs Sheet > Project Cost Sheet
- Funding > Funding Sheet > Funding Sheet
- Schedule of Values > General Spends SOV
- Schedule of Values > Payment Applications SOV
- Schedule Sheets > Project Schedule Sheet
- Access Control
- User Administration > Users (default user: Coadmin)
- User Administration > Groups (shell level group permissions for All Project Users, Creator, Project Administrators, Reviewer)
- Setup > Business Processes
- Setup > Dashboards > Project Delivery
- Cost Manager > Cash Flow
- Document Manager > Documents (contains a default folder structure)
- Document Manager > Project Documents (contains a default folder structure)
- Reports > User-Defined

You can also use the Templates or Shell Templates node to change:

- A Cost Manager with a capital planning cash flow
- The access control to project functions for users and groups
- The user/group administration to add and manage project users and groups
- The business processes that you want to automatically include in the project
- A dashboard to display project information on the shell landing page
- A Document Manager to store drawings, spreadsheets, image files, specifications, and other project documentation
- The reports specific to Primavera Project Delivery
- The Project cost sheet
- The Funding sheet
- The Schedule of Values (SOV)
- The Project schedule sheet
- The Rules for cost calculations

Refer to the *Unifier Administration Guide* for more details.

Reports

The Reports node is designed and set up for use with Project Controls.

Reports (Company Workspace-User mode)

The Reports node, depending on the level of your permission, includes the User-Defined module containing User-Defined Reports (UDRs).

Reports (Shell-User mode)

The Reports node, depending on the level of your permission, includes the following modules containing reports pertaining to each category.

- User-Defined
- Custom
- System

> **Note**: The Custom and System modules are accessible if you have BI server connection, only.

User Mode Navigator

The User Mode Navigator contains the following nodes:

At the Company Workspace Level

- Summary
- Collaboration
- General
- Cost Manager
- Document Manager
- Resource Manager
- Company Logs
- Report

At the All Projects Level

- Alerts
- Mailbox
- Task Manager
- Information
- Portfolio Manager
- Project Master Data
- Reports

At the Project Level

- Alerts
- Mailbox
- Task Manager
- Information

- Document Manager
- Financial Transactions
- Change Management
- Financial Reporting
- Project Designs
- Submittal Manager
- RFI Manager
- Drawing Management
- Schedule Manager
- Communication & Follow up
- Ongoing Reporting
- Project Closeout
- Reports

Using Standard View

The Unifier standard view is available in the following logs:

- Central tasks log (**Tasks** log): Go to **Home** > **User** mode > **Tasks**
- Company tasks log (Business Process log): Go to **Company Workspace** > **User** mode > **Company Logs**
- Project/Shell tasks log (Business Process log): Go to **Project** or **Shell** > **User** mode > **Logs**
- Company Document Manager
- Project or Shell Document Manager

To change the view, click the **Switch to Classic View**/**Switch to Standard View**.

Notes:

- Unifier displays the Tasks, Notifications, and Drafts nodes, in the respective Company Workspace and Project/Shell, based on the deployment of your user mode navigators.
- Refer to the User Guide for more information about using the Standard View of the Tasks, Company, and Project/Shell logs.

About Business Processes (BPs)

Business processes (BPs) manage the flow of information, drive transactions and collaboration, and can be associated with specific projects or applicable to the entire company. For details on how to develop a new business process (BP), refer to the *Unifier uDesigner User Guide.*

The Project Controls base product has a suite of pre-defined BPs. In general, a BP consists of forms, workflows, and logs.

Forms

Forms are electronic versions of paper forms, used to enter or review data and to respond to tasks. Most BP forms consist of three major sections:

- Header or upper form: Present in all BP types
- Action (or task) details: Present only in workflow BPs
- Form content or lower form: Changes based on BP type and design

Workflows

Workflows define the routing and behavior that represents an organization's decision-making process.

A BP workflow specifies how the BP should proceed (from start to finish) and consist of steps connected by links:

- Step: Each step is associated with one or two forms that govern step behavior.
- Link: Connects steps in a business process. It defines record routing and status, based on the design of the workflow. (A record is an instance of a business process after it is routed from the creation step to the next workflow step.)

When you participate in a BP workflow, you are taking action on the form (for example, reviewing and approving an invoice, or responding to a request for information). Depending upon the workflow setup, you may choose the next recipient of the BP in the workflow, or this may be automatically selected for you. When you send the BP to the next step, it proceeds along the workflow and records each action taken at each step.

Logs

BPs are stored in Logs, accessible through the Navigator. You can think of Logs as a filing cabinet with multiple drawers. Each BP (drawer) listed under Logs has its own *log* which displays (on the right-hand pane) a list of records (instances or forms) for that particular BP. To access an existing record within a particular BP you need permission. This applies to the records that you have created and the records that other users have created.By default, you can access the records that you have created. If you have been included in the workflow of a record (recipient, assignee, copied, etc.), you can access that record, as well.

The following are the common BP types:

- Simple: Add company or project information that does not require line items. For example, project information, vendors, and service requests.
- Line item: Use to document miscellaneous information for a project or company. For example, use a meeting minutes business process to capture the minutes of all team meetings, with each line item generating an action item for a team member.
- Document: Route documents for review. Document business process is an extension of the line item type; its line items display file attachments. Examples are submittals and transmittals.
- Text: Enter comments and view an audit trail of communication between workflow participants. For example, action items, Request for Information (RFI), and issue resolution BPs.

Workflow and non-workflow business processes

A business process type can include a workflow or several workflows. A workflow business process represents a set of coordinated tasks and activities that accomplish a specific business goal. For example, a workflow BP is used to create a contract and then manage changes to the contract, such as approvals for increases in labor costs and materials.

Some BP types have a single purpose of storing data. These BP types are often data entry forms designed to enter information directly into Unifier and are referred to as non-workflow business processes. A non-workflow business process is used to manage data. For example, a non-workflow business process is used to store information about vendors (Vendors BP).

Since there is no workflow, non-workflow BPs do not contain the middle Action (or Task) Details section.

There are several ways to create a non-workflow BP record after all required fields have been completed:

- Click **Finish Editing**
- Click **Save** (This does not create a draft, as seen in a workflow business processes.)
- Add a line item
- Add general comments

Business process (BP) record

A BP record is created when a form in the workflow is sent to the next person, generating a task.

Creating a new BP record typically involves the following steps:

- Click **New**
- Complete the form
- Select **Workflow Action**
- Assign recipients
- Click **Send**

You can create a BP record and generate a task in these areas:

- Business process logs
- Tasks log
- Master Log in the Home tab
- Document Manager

Responding to Tasks

These are the typical steps in working with tasks:

- Review the task before accepting it
- Respond to the task
- Route the record to the next workflow step

Each workflow step, except Creation and End, has two phases: Review and Response, separated by the Accept Task action.

The *Review* phase displays a read-only view form. Examine the entire view form to:

- Understand how the task came to the recipient
- Decide to accept or decline the task
- Identify pre-work needed to complete the task
- Prioritize work

The *Response* phase presents an active action form:

- Accept the task
- Enter data
- Select the appropriate workflow action
- Add task and message recipients
- Attach files, and possibly linking other records or mail
- Add comments or notes
- Send the record to the next step

When *routing* a section:

- Select **Workflow Action**
- Assign recipients
- Click **Send**

Routing to the End Step

The End step denotes the end of a workflow. If the End step is a view form, you cannot take action -- all forms are read-only.

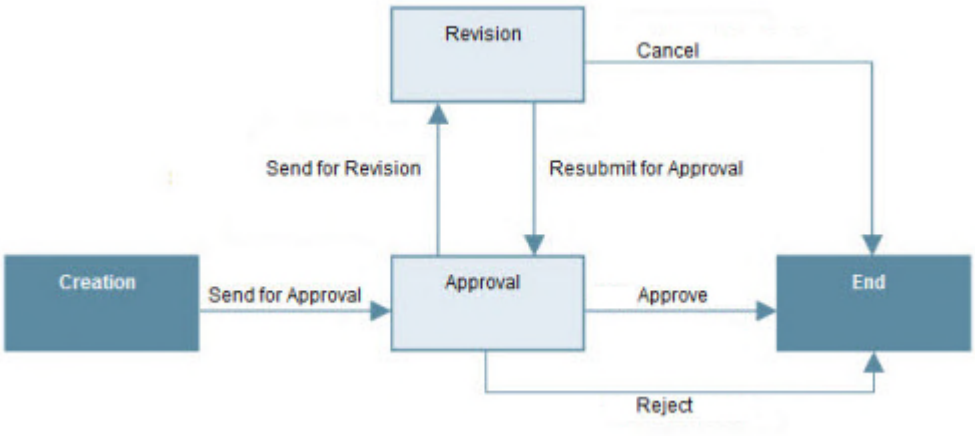
An End step can also be associated with an action form where some fields are editable.

About Workflow BPs

Workflow BPs utilize Unifier workflow engine to route a record to another step in the workflow. Record status on a step is part of the business process design. Workflow step settings define who can participate on a step. Most workflow business processes in the PCC route a record through an approval process that follows these steps:

- Creation Step
- Approval Step
- Revision Step
- End Step

Each step in the workflow is set up individually. Step-by-step, the administrator can define responsibilities for users and groups through task assignments, completion policies and resolving action settings, and email notification settings. Non-administrative users can complete business process forms, select Workflow Actions, and assign task recipients. They can track business process routing between steps and trace a record's path through the workflow.



In the workflow example above, the Creator fills out the business process form and sends it for approval. The act of sending the form creates a permanent record and a task for the Approval step assignee.

Depending on the step the task is on, there are different Workflow Action selections. For example, Workflow Actions from the Approval step include:

- Approve — This Workflow Action routes the record to the End step in Approved status.
- Reject — This Workflow Action routes the record to the End step in Rejected status.

Workflow Actions from the Revision step include:

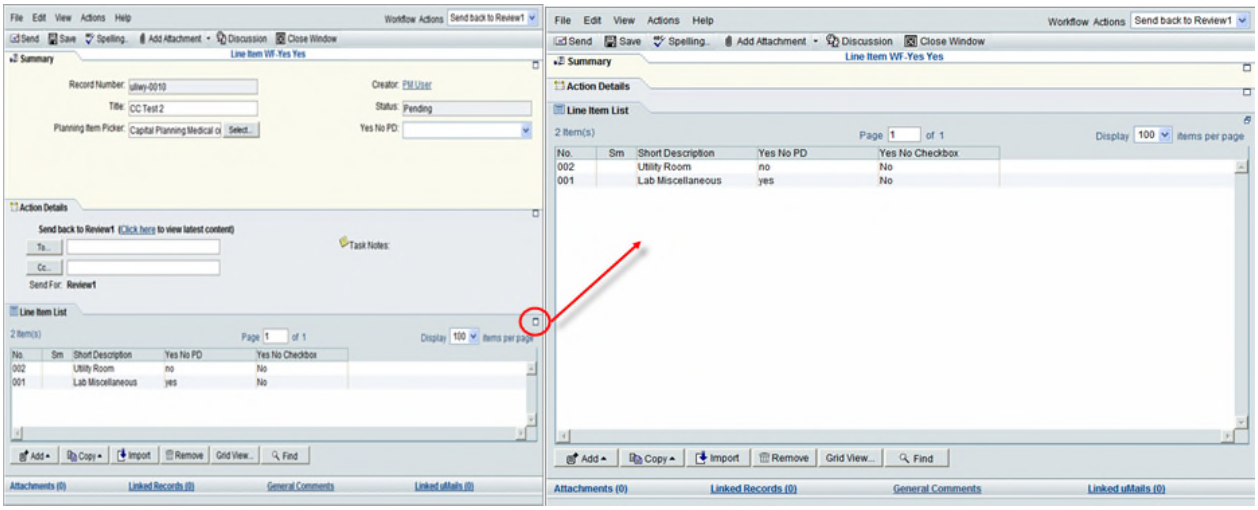
- Send for Revision — This Workflow Action routes the record back to the Approval step in Pending status.
- Resubmit for Approval — This Workflow Action routes the record back to the Approval step in Pending status.
- Cancel — This Workflow Action routes the record to the End step in Canceled status.

Workflow business process forms consist of:

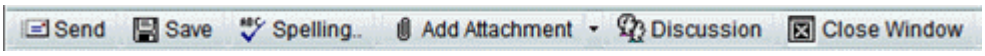
- An Upper form
- Task Details (visible before task acceptance)
- Action Details (visible after task acceptance)

  Note that Non-workflow business processes do not have an Action Details section.
- Line Item Details, unless otherwise noted.

You can minimize and later expand a business process form. For example, you might want to minimize the General and workflow portions of the form to avoid scrolling through many line items.



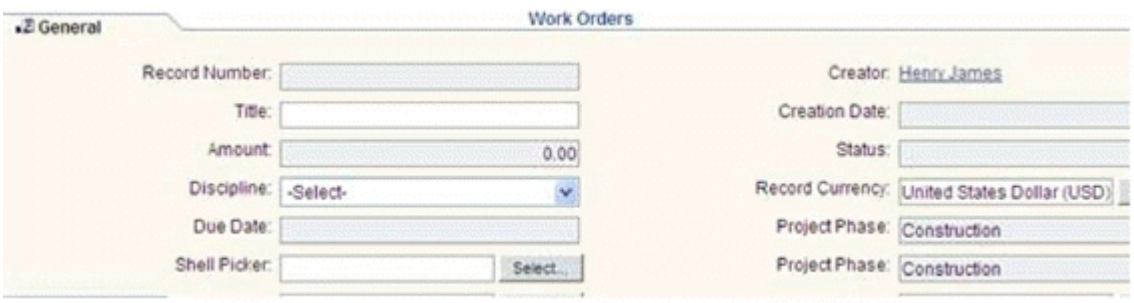
Toolbar: The workflow business process form has a toolbar at the top of the form, with the following buttons:



After you are done working on the business process form, click **Send** to route the workflow business process to the specified recipients. You can click **Save** to save a draft of the form, so you can work on it again. Click **Spelling** to check the spelling in your form. You can click **Add Attachment** to add attachments to the form. If the BP is designed to include discussions among members of a group (Classic View only), you can click **Discussion** to open a discussion forum. When you have completed work on the business form, click **Close Window**.

> **Note**: The Close Window action does **not** save the information on the form. To save the information, you must click **Save** before you click the **Close Window** button.

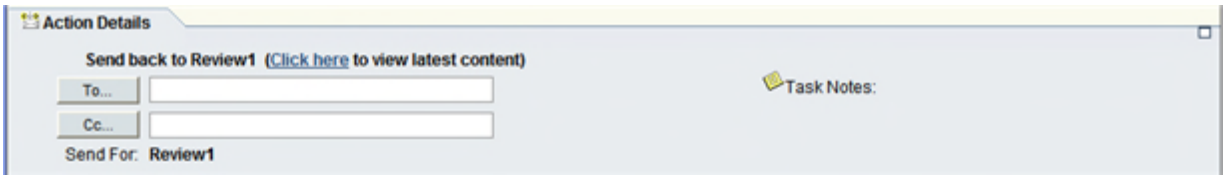
Upper Form: The upper portion of the business process contains the basic (General) information that the form is managing, such as the name of the record and its description, who created the record and when, and other general information. It may also contain fields for referencing other forms, and it may contain fields that are required for specific functionality. This is an example of an upper form for a business process type called Work Orders:



Workflow or Action Details: This section appears in the middle part of workflow business processes. It is for viewing or assigning the next assignee in the workflow or shows the last person who took action on it. Depending on how the workflow has been set up for the BP, the next assignees may be predetermined, or you may be able to choose the next assignee or send a copy of the BP to another user. You can print the Workflow Progress using custom print.

Non-workflow business processes do not have an Action Details section.

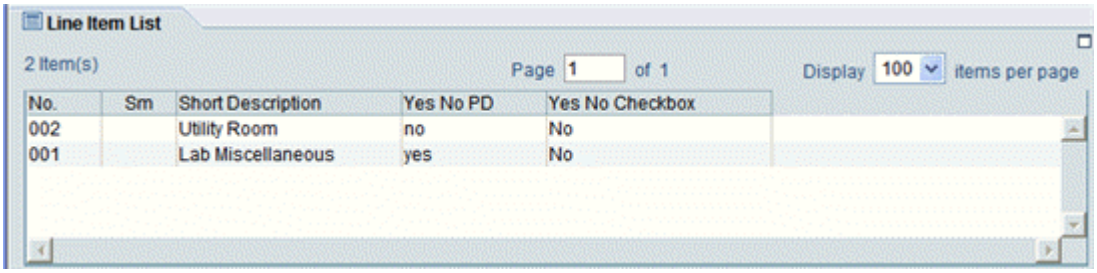
This is an example of the Action Details section of a business process.



- Track a step through the workflow by clicking "**Click here**" to view latest content.
- Add task assignees and message recipients via the **To:** and **Cc:** buttons, which are active after you select a workflow action.

  The Workflow Actions drop-down menu is in the upper right corner of the form.
- Click the notepaper icon next to **Task Notes** in the Action Details section to add notes to the routed task. These are notes for the task recipients.

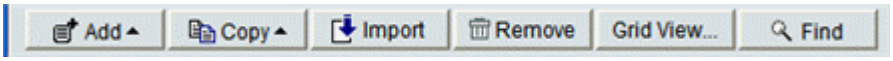
Line Items List: The lower portion of the form contains record details, such as line items, file attachments for document-type business processes such as transmittals or submittals, or comments or instructions in text-type BPs such as RFIs. Simple-type BPs do not have a Line Item List section.



Line Item type and Cost type business processes can have up to eight tabs in their Line Items List.

> Tip: If the entire name is too long to appear on the tab, hover over the tab. Unifier will display the complete name in a tool tip.

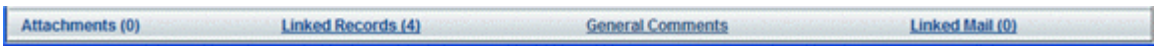
There are buttons under the Line Item List that enable you to work with line items:



- **Add** button — Use this button to add detail or summary line items to the record.
- **Copy** button — Use this button to copy another line item from the record, included consolidated line items.
- **Import** button — Use this button to import a line item from a CSV file.

- **Remove** button — Use this button to delete a line item from the record.
- **Grid** button — Use this button to enter line items directly into the line item list. (This is best used for short line items.)
- **Find** button — Use this button to locate a line item in a long list of line items.

Links at the bottom of the business process form allow you to view, attach, or link files, records, comments, or Mailbox.



Refer to the *Unifier User Guide* for more information about workflow BPs.

Resolving Actions and Completion Policy

A **resolving action** moves the step to either a following step, a previous step, or a conditional step that essentially "re-addresses" or "revisits" the task. This step must be completed before the workflow can continue. The assignees on this resolving action step can include the original task assignees and can also include new assignees.

Your administrator sets a "completion policy" on each step in a workflow. This policy determines when the step is complete and where the step proceeds from there. A step can be complete under the conditions listed below.

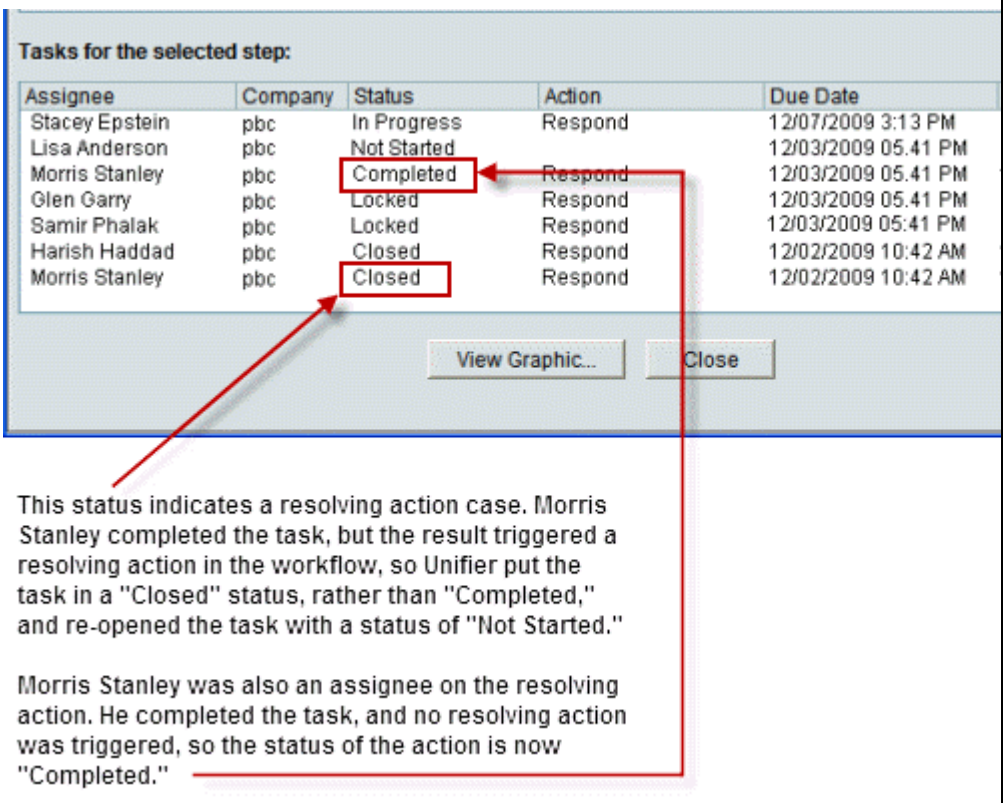
- **Single** completion policy: Any single user can accept a task and complete it, and the record will move forward to the next step.
- **All-majority** completion policy: All assignees to the task have responded to it and a majority has agreed on the action that moves the record forward to the next step. If there is no clear majority on the action, Unifier will use a *resolving action* to determine how the record moves forward.
- **All-consensus** completion policy: All assignees to the task have responded to it and all assignees have agreed on the action that moves the record forward to the next step. If there is no consensus on the action, Unifier will use a *resolving action* to determine how the record moves forward.

Status

The Status conditions you see on the "Tasks for the selected step" window are internal to Unifier and are used only to display the status of the workflow step **relative to the completion policy**.

The Status conditions are:

Status	Description
Not Started	The assignee has not accepted the task.
In Progress	The assignee has accepted the task.
Locked	This status is used when the step has a single completion policy and one of the assignees accepted the task. This status denotes those assignees who were also assigned to the task, but because of the single completion policy,

Status	Description
	the task was locked and these assignees no longer have access to it.
View Only	This status indicates that this user was cc'd on the task, but is not expected to take action on the task.
Completed	This status is given to an assignee's action if the task was finished and needed no resolving action. At any step, a task can have only one status of "Completed."
Closed	This status is given to an assignee's action if the task was finished, but triggered a resolving action. The task will either return to a previous step, move forward to a next step, or divert to a conditional step, which will resolve the condition and move the task forward in the workflow. The step the action moves to for resolution will show a status of "Not Started." The number of times the task shows a "Closed" status indicates the number of times the step has been revisited.
	To illustrate: 

About Non-Workflow BPs

Non-workflow business processes store data and do not have routing capability. As with all business processes they have an upper form and may, or may not, have line items. You can use them when you need to access a single source for your data. Non-workflow business processes comprise both single and multiple-type business processes. For example:

- A project may require a "gold-standard" data sheet; a **single-type** business process suits the purpose because you only need one record.
- A company may use many vendors; a **multiple-type** business process suits the purpose because you can create many unique records that collect similar data

A non-workflow business process does not generate tasks and is viewable in its business process log or in the Data Manager, provided you have permissions. When you save a non-workflow business you can save it in either edit mode or read-only mode. If the record is in a terminal status and you click Finish Editing to save it, the record becomes permanently read-only with no way to return it to edit mode.

Creating a BP Record

Each time you fill out a business process (BP) form, you are creating a new record for that BP. These BP forms can be routed to project team members or other Unifier users via workflows.

> **Note**: BPs that do not have a workflow are stored as information records.

BP records are stored in logs. For more information about business processes, see the following sections:

- ***About Business Processes (BPs)*** (on page 29)
- ***Opening an Existing BP Record*** (on page 43)

A BP record contains an upper form, an action area, and, for some BPs, a detail form (for example, the Meeting Minutes BP provided with PPDM).

The following instructions explain how to fill in the upper form (detail form), choose an action, and send the record into use.

To create a new BP record:

1) Click **New** on the tool bar at the top of the log to open the BP form.
2) Fill out the form.

   To fill out a form:

   I. Complete the upper portion of the form. The fields that are marked with a red asterisk (*) require input.
   2. Complete the content (detail) section:
      - If this is a *line item* or *cost-type* BP, add line items as necessary. See ***Business Process Type: Line Item or Cost*** (on page 39).
      - If this is a *document-type* BP, attach the documents to the form. See ***Business Process Type: Document*** (on page 40).

- If this is a *text-type* BP, complete the text portion. For example, for an action item, include the instructions in the text box in the lower portion of the form. See ***Business Process Type: Text*** (on page 41).

3. (Optional) You may add additional information, including:
   - Add general comments.
   - Attach a file to a general comment.
   - Add or review graphical markups to an attached document.
4. When you have completed the form, do one of the following:
   - If this is a non-workflow business process:

a. Click OK to save your changes.
b. Click Finish Editing.

   - If this is a workflow BP:

a. In the Action Details area of the form, designate the next assignees (users and groups) who will receive the form on the next step in the workflow as a task.
b. (Optional) You can also add Task Notes for the next participants in the workflow. Task Notes apply to the next workflow step only and are not stored with the permanent record.
c. When you have completed any necessary edits or additions, select an action from the Workflow Actions drop-down list at the top of the form. The action you take depends on the task assigned. For example, if this is a review step, an action that you may be able to select is "approve."
d. Click **Send**.
   - If the workflow has not been completed yet, the form will be forwarded to the next team members in the workflow.
   - If the workflow has been completed (that is, your input was the last step of the workflow), the record will appear as complete in the BP log.

Business Process Type: Line Item or Cost

To *add* a line item to a record:

1) From the bottom of the form, click **Add**.
   - If the business process (BP) does not use summary line items, Unifier opens the Line Item window.
   - If the BP uses summary line items, choose **Detail Line Item** or **Summary Line Item**, as appropriate, to open the Line Item window.
2) Complete the line item fields and then click **OK**.

To *edit* a line item:

> **Note**: As long as the BP form is still a draft, you can edit a line item at any time.

1) Select a line item and click **Open**.

2) Make your changes to the line item.
3) Click **OK**.

To *remove* a line item:

1) Click on a line item to select.
2) Click Remove.

Business Process Type: Document

Document-type business processes such as Transmittals or Submittals, can be used for routing documents such as specifications or drawings for review. Comments and graphic markups can be added to individual files, and the document list is easily accessible from the BP form. Some document-type BPs can be designed such that files can be added to individual line items, which allows users to assign line-item status to individual documents.

To *add files* to Document-type BP records:

Open the form and do one of the following:

- If the BP has line items, click **Add** and choose **Import Line Item w/ Attachments** > **My Computer**.
- If the BP does not use line items, click **Add Attachment** and choose **My Computer**.

The method for attaching files is dependent upon the file transfer option you chose in the user preferences.

To *attach files* from the Document Manager:

Open the form and do one of the following:

- If the BP has line items, click **Add** and choose **Import Line Item w/ Attachments** > **Primavera Unifier Folder**.
- If the BP does not use line items, click **Add Attachment** and choose **Primavera Unifier Folder**.

The Select Files window opens.

From the Select Files window, select the documents or folders to attach and click **OK** when finished.

If you want to include the comments that may be attached to the document, select the **Copy Comments** checkbox and click **OK**.

The files appear in the lower portion of the window.

> **Note**: If the BP has line items and you select a folder or multiple documents, each document will be added in a separate line item.

To *remove attachments* from Document-type BP records:

To remove attachments from Document-type BP records you can do one of the following:

- Remove the entire line item:

I. From the form, select the line item to be removed.

2. Click the Remove button.
3. Click Yes to confirm. The line item and attachment are removed

- Remove the attachment from the line item

1. From the form, double-click the line item. The detail line item window opens.
2. Click **Remove**.
3. Click **Yes** to confirm. The line item and attachment are removed.

Since "Name" is a required field, you must give the line item a new name before closing the line item detail window. If you close the detail line item window before entering a new name, the name of the file that has been removed will remain in the field. Click **Yes** to confirm. The attachment is removed from the line item.

Business Process Type: Text

Comment

When you add a comment to a business process (BP) form, it remains as a draft until you send the form to the next step in the workflow. Draft comments remain editable until you send the form. You cannot modify a comment after you send a form that has comment.

To add general comments to the BP form:

1) At the bottom of the BP form, click the **General Comments** link. The General Comments window opens.

   - **Note**: If any comments already exist on a BP, the existing comments will be listed in the Comments section of the window.

2) Click **Add**. The Edit General Comment window opens.
3) Type your comments in the text box. You can spell-check by clicking the **Spelling** button.
4) To add files to the comment, click **Attach**.
   - **My Computer:** Attach the file from your local system. The procedure is the same as for uploading files to the Document Manager and depends on your file transfer option.
   - **Primavera Unifier Folder:** Attach documents from the **Document Manager**. The window opens displaying the project documents files and folders. Select the files and folders to attach and click **OK**. Folders are not attached. Instead, the contents of selected folders are attached in a flat list. Documents with duplicate file names will not attach.
5) Click **OK** to save the comment and close the **Edit General Comment** window.

   - **Note**: The Text Comments box does not recognize formatting, including line breaks. Even if you press the Enter key to make a new line in the Edit General Comment window, the final comment will not reflect the new line.

6) Click **Close Window** to save your comments and return to the BP form.
   An icon will appear at the bottom of the form next to the **General Comments** link.

To add a comment to an attached document:

> **Note**: For document-type BP (such as Transmittals or Submittals), you can add comments directly to an attached document.

1) Select the document from the document list at the bottom of the form.
2) Click **Comments**.
3) Click **Add** to add the comment.
4) Enter the text comment. You can also add a graphic markup to the document or attach a file to the comment.
5) Click **OK**.

To edit a comment:

1) From the General Comments window, select the comment to edit and click **Modify** from the toolbar. The Edit General Comment window opens.
2) Make the necessary edits. Comments are editable until you click **Send** (workflow BP) or **Submit** (non-workflow BP).

To delete a comment:

From the General Comments window, select the comment to delete and click **Remove**.

Task Note

Notes that are specific to a task can be added to a business process (BP) form. They are temporary notes that can be used as comments or specific instructions to the next user in the workflow. Task notes are not forwarded throughout the workflow and are not archived. You can think of them as sticky notes that stay with the form for one step in the workflow only.

To add a task note to a business process:

1) In the Action Details section of the BP, click the **Task Notes** icon. The Add Notes window opens.
2) Enter the text for the task note and click **OK**.

Assign Users to the Next Step

Depending upon the workflow configuration and your user permissions, you can select one or more users or groups to whom the form will be sent at the next step in the workflow.

The assignee fields are:

- **To:** The users or groups that you choose will be assigned the next task in the workflow. Team members listed will receive an e-mail notification of the task.
- **Cc:** These users and groups receive an e-mail notification and a copy of the record in their Message log. They can review the record, but cannot take action on the workflow.

To assign team members to the next workflow step:

1) In the **Assignee** portion of the form, click **To**. The User/Group picker opens.

2) Select the users or groups you want to send the form to and click **Add**, then click **OK**. Unifier adds the assignees you specified to the **To** field.

   When the business process form is sent, each member will receive an e-mail message regarding their task assignment and a copy of the form in their Tasks log.

To send a copy of the BP form to another user:

1) Click **Cc**. The User/Group picker opens.
2) Select users or groups you want to copy and click **Add**, then click **OK**. Unifier adds the assignees you specified to the **Cc** field.

   When the BP form is sent, each member will receive an e-mail message and a copy of the form in their Messages log.

Opening an Existing BP Record

Each business process (BP) has its own log, which displays a list of records (instances or forms).

Permissions allow you to access existing records from these logs, including:

- Records with which you are involved (as creator, assignee or Cc recipient).
- All company records created by other users in those logs.

> **Note**: The following information is based on the default setup of Unifier.

To open a BP log at the *project level*:

1) Open a project.

   You can use the All Projects tab to access the list of your projects.
2) From the left Navigator, expand each node to see the business processes in that node.
3) Open a business process to see the log.

   The log, which opens on the right-hand pane, displays a list of records for that particular business process.

To open a BP log at the *company level*:

1) Go to the Company Workspace tab and click Company Logs in the left Navigator. The Navigator shows a list of the business processes that reside at the company level.
2) In the left Navigator, double-click the name of the business process. Unifier opens the log in the right pane.

Mobile Application

Project Controls is configured to use with the Unifier iOS App. To disable this functionality:

1) Navigate to the **Company Workspaces** tab in Admin mode.
2) Expand the **Configuration** node and select **Business Process**.
3) From the log, select a business process.
4) From the **General** tab, deselect the check box **Enable for Mobile Application**.

About BP Forms

The electronic forms in Unifier are consistent throughout Unifier, with a similar look and feel. When you send a workflow business process form to the next step, the assignee receives a task.

When you first open a task, it appears in "view" mode. On the "view" version of this form, you can do the following:

- Accept the task
- Decline the task
- Print the form
- Terminate the record
- Send email
- Transfer ownership of the record
- Add an assignee to the current step
- Copy users to the current step
- Audit the progress of the record
- Add a comment, if you have permission

If you accept the task, the form becomes editable. On the editable, or "action," version of this form, you can do the following:

- Undo task acceptance, which allows someone else to accept the task.
- Decline the task, which takes you out of the list of assignees.
- Select the step's next action.
- Add or edit form content
- Save a draft of the record
- Terminate the record
- Transfer ownership of the record
- Display the view form of the business process
- Audit the progress of the record
- Spell check the record content
- Add attachments, line items, etc.
- Send the form to the next step

The electronic form appears similar to a paper form—you complete the form by typing information directly into the form fields or choosing options through drop-down lists, pickers, or checkboxes.

> **Note**: The section labels are determined in uDesigner and may vary. The basic form functionality remains the same.

Refer to the "About Business Processes" chapter in the *Unifier User Guide* for information about:

- Filling out a BP form
- Saving a draft of a Workflow BP
- Adding, editing, or removing a Line Item

- Working with file attachments and markups
- Attaching files and markups
- Adding or viewing graphic markups to a BP Attachment
- Attaching files to a Document-type BP
- Removing attachments from a Document-type BP Record
- Linking BP Records
- Email notifications for BPs
- Initiating, participating in, or closing a discussion group (Classic View only)

Tasks Log

For any action other than creating a new business process (BP) record, we recommend that you monitor BPs using your Tasks Log. Business process logs list every record of that business process type, but the Tasks Log lists only those records that have been assigned to you for action.

If you are participating in a workflow, these tasks will be the forms you need to complete on a workflow step. Tasks that are late appear in red on the log.

Tasks Logs are located in projects, in the company workspace, and in one central Tasks Log for all company and project business processes.

The following tasks may appear in your Tasks logs:

- You are part of a BP workflow and are requested or required to take some sort of action.
- In Classic View, you have been invited to join a discussion group by another user who is requesting assistance with drafting comments or markups on a BP. These are indicated as being sent for "Discussion" in the Tasks Log.
- You are an editor on a BP, which means you are a user or member of a group that can edit a BP without being granted explicit record-level permission.

  This allows users other than the assignee to edit the BP record. Editors can be added to these workflow or non-workflow business process types:

  - Line Item
  - Cost (all types, including Lease and Line Item with Multiple Codes)
  - Document
  - Simple
  - RFB
  - Text

  If you are an editor on a business process, you can open and edit any record that you can see listed in the log, per your view access permission (View User Records, View Company Records, or View All Records).

  You must have at least one of these permissions to be able to view the record in the log to access it to edit.

  - Editors cannot edit a workflow record until the task assignee accepts the task, and saves the draft.
  - Edits performed by editors are not audited.

- Edits performed on the end step of a workflow BP affect the record directly, as no draft exists.

Refer to the *Unifier User Guide* for details about the following topics:

- Viewing your tasks
- Opening and accepting tasks
- Undoing accepted tasks
- Declining a task

Notes:

- Unifier displays the Tasks, Notifications, and Drafts nodes, in the respective Company Workspace and Project/Shell, based on the deployment of your user mode navigators.
- Refer to the User Guide for more information about the Standard View of the Tasks, Company, and Project/Shell logs.
- Refer to the User Guide for more information on printing multiple records.

Setting up Project Controls

Refer to the *Unifier User Guide* for information about signing in and out of Unifier.

The following list describes all the steps that need to be completed before you can use Project Controls:

a) Add users to the company (Refer to the *Unifier Administration Guide*)
b) Assign users to the preconfigured groups if they are working on the company workspace. (Refer to the *Unifier Administration Guide*)
c) Create a project using a project template (Owner or Contractor). (Refer to the *Unifier Administration Guide*)
d) Add users to the project. (Refer to the *Unifier Administration Guide*)
e) Assign users to the preconfigured groups in the project. (Refer to the *Unifier Administration Guide*)
f) Set up the required master data for the following All Projects level BPs: Change Quote Decision, Submittal Revision Approval Codes, and Submittal Revision Sequencer. For more information, see topic *Project Master Data.*

Notes:

- If you are not using P6 as your data source, you must remove the Project Cash Flow - P6 Data Sources provided in the project template.
- If you are only installing the Project Controls base product, the following data elements (Employee Photo, Site, Building, Space, Space No., and Floor) should be removed from the Additional Attributes, Logs, Integrations, and Pickers in uDesigner under User Attributes.

Company Logs

This node contains the following business processes that are associated at the company level:

- Blanket Purchase Orders
- New User Requests
- Project Requests
- Timesheets
- Vendor Prequalifications
- Vendor Evaluations
- Vendors

Vendors Business Process

Purpose

The Vendors business process is a Company-level, Simple type, or Line Item type, and non-Workflow business process that enables you to capture and store vital information about a Vendor such as bidding information, vendor type, vendor contact information, insurance coverage, and business certifications.

> **Note**: Each type of vendor information, up to eight types, can have its own detail-form tab.

When you create a Vendors BP, you can set the language and time zone for the bidder.

Language, Time Zone, and Date Format for Vendors BP

While creating a Vendors BP, you can set the Language, Time Zone, and Date Format specific to your bidders. After you have completed bid invitation, to selected bidders, your Language, Time Zone, and Date Format setup is used by the system. Email notifications to bidders, Unifier Bidder Portal web page content, and Bidder forms all retain the settings. The notifications follow the preferences of the user who has been specified in the Bid contact of the Company Properties page.

Business process characteristics

Vendors is a non-workflow, company-level, line item-type business process. You can create multiple Vendors records for your company; each Vendors record specifies one Vendor. The Vendors record can be auto-created from an approved Vendor Prequal Requests record, or it can be manually created. Because this is a non-workflow business process you access a Vendors record in **Company Logs** > **Vendors** log. Integration is defined for Upper and Detail forms. The item logs section of the Vendors record displays a query tab, Contracts. An individual help file is available for this business process.

Groups associated with this business process

Members of the **Company Administrators** group can create and edit this business process.

Record Statuses

Active and Inactive, neither of which are terminal.

Additional Information

- Designated as the Request for Bid (RFB) master vendor list.
- Enabled for mobile and hand-held devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record:

- In a project's Navigator, click **Document Manager** and select **Documents**.
- In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record:

In the Company Workspace Navigator, click **Document Manager** and select **Company Documents**.

In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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Creating a Vendors Record Manually

Before you begin, check to make sure you do not already have a Vendor record that was auto-created by the Vendor Prequal Requests record, or there is not a Vendor Prequal Request already being routed for approval.

To create a Vendors record manually:

1) Navigate to the **Company Workspace** tab, **Company Logs** >**Vendors**. The Vendors log opens.
2) From the BP log page, click **Create**. Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can save the form or add line items. See Adding Line Items.

Upper Form

In this field	Do this
Vendor ID*	This is a required field - Enter up to 16 alpha-numeric characters to identify the vendor.

In this field	Do this
Vendor Name*	This is a required field - Enter the vendor's name. You can enter up to 50 alpha-numeric characters.
Vendor Type	Select the Vendor Type from the drop-down menu.
Discipline	Select the Discipline from the drop-down menu.
Tax ID	Enter the vendor's Tax ID. You can enter up to 16 alpha-numeric characters.
License No	Enter the vendor's License Number. You can enter up to 16 alpha-numeric characters.
Reference ID	Enter the vendor's Reference ID. You can enter up to 16 alpha-numeric characters.
Issuer's WebSite/URL	Click the Link icon. Enter the website name and URL.
Address 1	Enter the vendor's address. You can enter up to 120 alpha-numeric characters.
Address 2	You can use this field as needed. You can enter up to 120 alpha-numeric characters.
Address 3	You can use this field as needed. You can enter up to 120 alpha-numeric characters.
City	Enter the vendor's city.
State/Province	Select the vendor's state or province.
Zip/Postal Code	Enter the vendor's zip or postal code.
Country	Select the vendor's country
Primary Contact	Enter the name of the vendor contact.
Email	Enter the vendor contact's email.
Phone	Enter the vendor contact's phone number.
Fax	Enter the vendor contact's fax number.
Contact Company	The vendor Name. This is a read-only field.
Bidder Email*	This is a required field - Enter the bidder's email address.
Bidder First Name*	This is a required field - Enter the vendor contact's first name.

In this field	Do this
Bidder Last Name*	This is a required field - Enter the vendor contact's last name.
Insurance Company	Enter the name of the insurance company.
Policy No	Enter the vendor's insurance policy number.
COI expiration Date	Enter the date on which the insurance expires.
Indemnification Amount	Enter the liability amount.
Minority-owned Business	Select the check-box if appropriate.
Woman-owned Business	Select the check-box if appropriate.
Disadvantaged-own Business	Select the check-box if appropriate.
Certificate Number	Enter the certification number of the business classification.
Expiration Date	Select the appropriate date using the date picker.
Remarks	Enter up to 4000 alpha-numeric characters.

Item Logs

Line Items Tab

Provides general information about the record.

Contracts Tab

Use to create a new record as well as view, copy, or find existing records.

Adding Line Items

The record must be in Edit mode to be able to modify it.

1) Click **Edit** If the Vendor record was auto-created, or is otherwise in read-only mode.
2) In the **Line Items** section click **Add** or **Grid**. The Line Item form opens.
3) Complete the Line Item form according to the Line Item table below. You must complete all required fields on each line that you enter before you can save the Line Item.
4) Click **Save** (if using the grid) or **OK** (if using the Line Item form) to save the form. The Line Items form closes.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items List opens.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.

Line Item List Table

In this field Use	Do this
Tab Name	You can enter a name for the tab.
General	
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Contact First Name	Enter the contact's first name.
Contact Last Name	Enter the contact's last name.
Title	Enter a title for the line item
Address 1	The Upper form auto-populates this field.
Address 2	The Upper form auto-populates this field.
Address 3	The Upper form auto-populates this field.
City	The Upper form auto-populates this field.
State/Province	The Upper form auto-populates this field.
Zip/Postal Code	The Upper form auto-populates this field.
Email	Enter the contact's email address.
Work Phone	Enter the contact's work phone number.

Saving the Vendors Record

To save the Vendors record, click either:

- **Finish Editing** to save the form in read-only mode.
- **Save** to leave the form in edit mode.

Vendor Prequalifications Requests Business Process

Purpose

You can use a Vendor Prequalifications Requests record to initiate and confirm or deny a new vendor approval request. You can use the Vendor Prequalifictions Request to capture and store information regarding a vendor; for example, vendor contact information, vendor type, insurance coverage, and the delivery method the vendor uses. Upon approval, the Vendor Prequal Requests record auto-creates a Vendor record, which will be in edit mode when you open the record.

Business process characteristics

Vendor Prequalifications Requests is a company-level business process without line items but with workflow. You can create multiple Vendor Prequalification Requests records for your company; each record specifies one vendor. Integration is defined. An individual help file is available for this business process.

Groups associated with this business process

Company Administrator, Reviewer, All Company Users, Auto-creation names the Coadmin as the Vendor record creator, Company Administrators receive error notifications

Record Statuses

Pending (non-terminal status), Approved (terminal status), Rejected (terminal status), or Canceled (terminal status)

Additional Information

- Enabled for mobile devices.
- Step completion policy and resolving actions can differ between steps. See Completion Policies and Resolving Actions.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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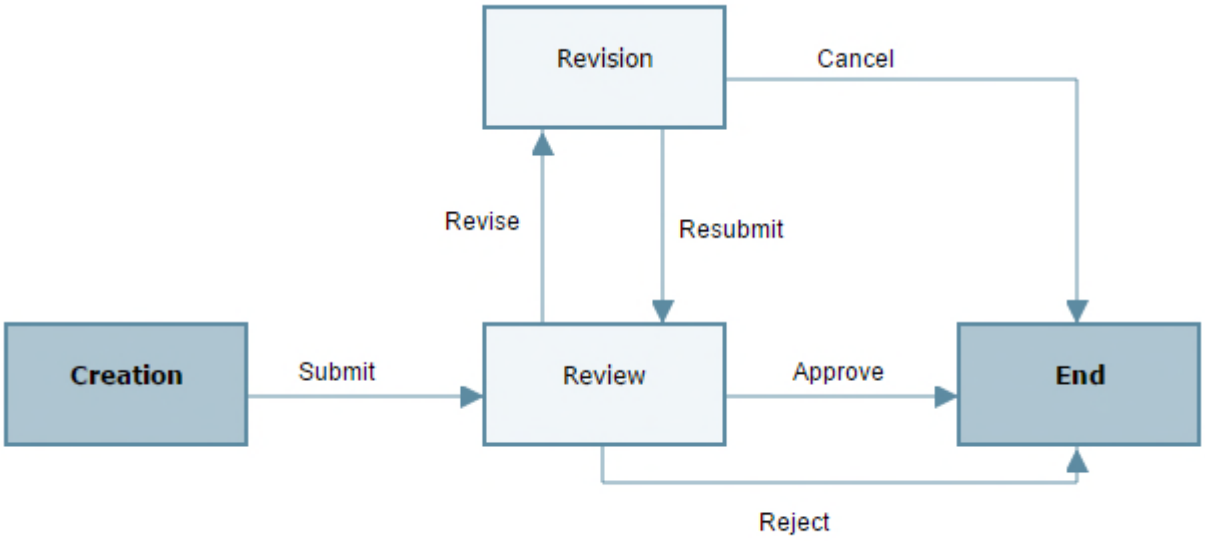
Vendor Prequalifications Requests Workflow

Below are the four steps of the **Vendor Prequalifications Requests** workflow.



Creating a Vendor Prequalifications Requests Record

To create a Vendor Prequalifications Requests record:

1) Navigate to the **Company Workspace** tab. Ensure that are in the User mode.
2) Expand the **Company Logs** node, and select **Vendor Prequalifications.** The Vendor Prequalifications log opens.

3) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the form.
4) In **Workflow Actions**, select **Submit**. This action activates **Action Details**.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
6) Click **Send** to route the record to the **Approval** step. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

In this field	Do this
Record Number	This is a read-only field that Unifier populates the first time you send the form to the Approval step.
Title*	This is a required field - Enter up to 16 alpha-numeric characters to identify the vendor.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in red in both the Tasks log and the business process the log.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you first send the form to the next step in the workflow.
Status	This is a read-only field that Unifier populates when you first send the form to the next step in the workflow.
Vendor ID	This is a required field - Enter up to 16 alpha-numeric characters to identify the vendor.
Vendor Name*	Enter the vendor's name. You can enter up to 50 alpha-numeric characters.
Tax ID	Enter the vendor's Tax ID. You can enter up to 16 alpha-numeric characters.
License No	Enter the vendor's License Number. You can enter up to 16 alpha-numeric characters.

In this field	Do this
Bidder First Name*	This is a required field - Enter the contact's first name.
Bidder Last Name*	This is a required field. Enter the contact's last name.
Vendor Type	Select the Vendor Type from the drop-down menu.
Reference ID	Enter the vendor's Reference ID. You can enter up to 16 alpha-numeric characters.
Bidder Email	This is a required field - Enter the contact's email address.
Address 1	Enter the vendor's address. You can enter up to 120 alpha-numeric characters.
Address 2	You can use this field as needed. You can enter up to 120 alpha-numeric characters.
Address 3	You can use this field as needed. You can enter up to 120 alpha-numeric characters.
City	Enter the vendor's city.
State/Province	Select the vendor's state or province.
Zip/Postal Code	Enter the vendor's zip or postal code.
Country	Select the vendor's country
Primary Contact	Enter the name of the vendor contact.
Email	Enter the vendor contact's email.
Phone	Enter the vendor contact's phone number.
Fax	Enter the vendor contact's fax number.
Justification	Enter a justification. You can enter up to 4000 alpha-numeric characters.
Insurance Company	Enter the name of the insurance company. You can enter up to 32 alpha-numeric characters.
COI expiration Date	Enter the Certification of Insurance expiration date using the date picker.
Policy No	Enter the policy number. You can enter up to 32 alpha-numeric characters.
Indemnification Amount	Enter the insurance company's contractual liability amount
Delivered Via	Select the delivery method from the drop-down menu.
Date Shipped	Enter the date the item was shipped.
Tracking No	Enter the shipping tracking number.
Expected Delivery	Enter the date the item is expected.

In this field	Do this
Remarks	Enter up to 4000 alpha-numeric characters.

Routing a Vendor Prequalifications Requests Record from the Review Step

Upon sending the business process form forward to the **Review** step, Unifier creates a permanent business process record and sends a task. An assignee can see the task in the **Tasks** log.

To route a Vendor Prequalifications Requests record from the Review step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes.
3) Click the **Accept Task** button.
   - You cannot make changes to the Action form when you are on the Review step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) When you are ready, select a workflow action. The choices are:
   - **Approve** — this action sends the record to the **End** step in **Approved** status, which triggers auto-creation of the Vendor record.
   - **Revise** — this action sends the record back to the record creator in **Pending** status. The **To** field is preassigned and you can **Cc** anyone listed in Users/Groups.
   - **Reject** — this action sends the record to the **End** step in **Rejected** status; this action does not trigger auto-creation of the Vendor record.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
6) Click **Send**.

Routing a Vendor Prequalifications Requests Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the assignee. You can see your active tasks in your **Tasks** log. When your task is complete, you can select one of two Workflow Action options, as described on step 5.

To route a Vendor Prequalifications Requests record from the Revision step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes.

   The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the workflow.
3) Click the **Accept Task** button. The form dynamically changes to an Action Form with editable fields. You can revise:
4) The record title field.
   - All fields in the **User Information** block.
5) When ready, select a workflow action. The choices are:
   - **Resubmit** — this action sends the record back to the Approval step in Pending status.
   - **Cancel** — this action sends the record to the End step in Canceled status.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
7) Click **Send**.

Viewing a Vendor Prequalifications Requests Record on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a Vendor Prequal Requests record on the End step:

1) Go to the **Company Workspace** tab and click **Company Logs** in the left Navigator. The Navigator shows a list of the business processes that reside at the company level.
2) Click **Vendor Prequalifications Requests**. Unifier opens the log in the right pane.

   When the record is on the End step, Task Details displays the text "Record has been closed."
3) Click the "**Click here**" link in Task Details to open the Workflow Progress Window. In the Progress Window you can see that the record is on the End step, as well as retrace the record's path in the workflow.
4) Click **View Graphic** to see an image of the workflow.

Vendors Evaluations Business Process

Purpose

You can use a Vendor Evaluations record to document vendor performance in consideration of future work.

Business process characteristics

The Vendor Evaluation is a company-level business process without line items but with workflow. You can create multiple Vendor Evaluation records for your company; each record specifies one vendor. Integration is defined. An individual help file is available for this business process.

Groups associated with this business process

Creator, Reviewer, All Company Users

Statuses

Pending (non-terminal status), Approved (terminal status), Rejected (terminal status), or Canceled (terminal status)

Additional Information

- Enabled for mobile devices.
- The Administrator can upload the business process help file in business process set up, where it is viewable in the business process log Help menu.
- Step completion policy and resolving actions can differ between steps.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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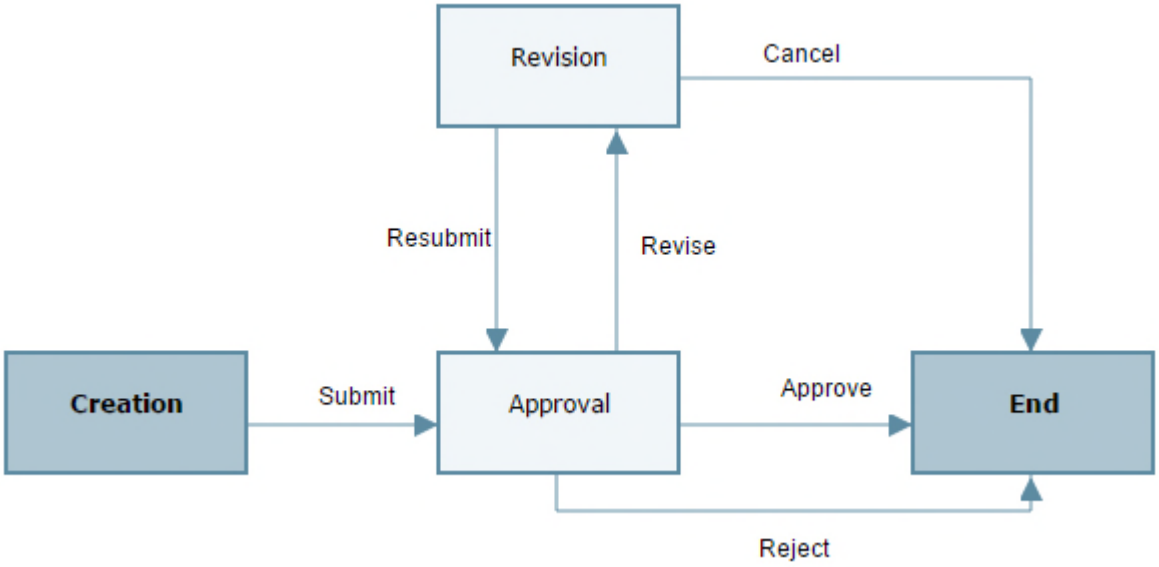
Vendors Evaluations Workflow

Below are the four steps of the **Vendors Evaluation** workflow.



Creating a Vendors Evaluations Record

To create a Vendors Evaluations record:

1) Navigate to the **Company Workspace** tab. Ensure that you are in the User mode.
2) Expand the **Company Logs** node, and select **Vendor Evaluation.** The Vendor Evaluation log opens.
3) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the form.
4) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This action activates **Action Details**.
5) In **Action Details**, select who should receive the record.

a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
b. Select the user or group who will receive the task on the next step.
c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.

6) Click **Send** to route the record to the **Approval** step. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

In this field	Do this
Record Number	This is a read-only field that Unifier populates the first time you send the form to the Approval step.
Title*	This is a required field - Enter up to 50 alpha-numeric characters to identify the record.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you first send the form to the next step in the workflow.
Due Date	This is a read-only field. Due Date is pre-populated and reflects the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This is a read-only field that Unifier populates when you send the form to the next step in the workflow.
Selected Vendor*	This is a required field - Select the vendor using the Vendors picker.
Vendor Name	This is a read-only field that Unifier auto-populates from the Vendor record.
Vendor Type	This is a read-only field that Unifier auto-populates from the Vendor record.
Address 1	This is a read-only field that Unifier auto-populates from the Vendor record.
Address 2	This is a read-only field that Unifier auto-populates from the Vendor record.
Address 3	This is a read-only field that Unifier auto-populates from the Vendor record.

In this field	Do this
City	This is a read-only field that Unifier auto-populates from the Vendor record.
State/Province	This is a read-only field that Unifier auto-populates from the Vendor record.
Zip/Postal Code	This is a read-only field that Unifier auto-populates from the Vendor record.
Country	This is a read-only field that Unifier auto-populates from the Vendor record.
Primary Contact	This is a read-only field that Unifier auto-populates from the Vendor record.
Email	This is a read-only field that Unifier auto-populates from the Vendor record.
Phone	This is a read-only field that Unifier auto-populates from the Vendor record.
Fax	This is a read-only field that Unifier auto-populates from the Vendor record.
Timely Completion	Select your assessment from the drop-down menu.
Comments	Enter your comments, up to 4000 characters.
Quality of Job	Select your assessment from the drop-down menu.
Comments	Enter your comments, up to 4000 characters.
Cleanliness of Job Site	Select your assessment from the drop-down menu.
Comments	Enter your comments, up to 4000 characters.
Cost Management	Select your assessment from the drop-down menu.
Comments	Enter your comments, up to 4000 characters.
Compliance with Policies & Procedures	Select your assessment from the drop-down menu.
Comments	Enter your comments, up to 4000 characters.
Would you hire again?	Select either Yes or No from the drop-down menu.
Was contract terminated for cause?	Select either Yes or No from the drop-down menu.
Overall Evaluation	Enter your comments, up to 4000 characters.

Routing a Vendors Evaluations Record from the Approval Step

To route a Vendors Evaluations record from the Approval step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the Vendors Evaluations Workflow.
3) Click the **Accept Task** button. The form dynamically changes to an Action Form.
   - You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) When ready, select a workflow action. The choices are:
   - **Approve** — this action sends the record to the **End** step in **Approved** status.
   - **Revise** — this action sends the record back to the record creator in **Pending** status.
   - **Reject** — this action sends the record to the **End** step in **Rejected** status.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
6) Click **Send**.

Routing a Vendors Evaluations Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the assignee. You can see your active tasks in your **Tasks** log. When your task is complete, you can select one of two Workflow Action options, as described on step 4.

To route a Vendors Evaluations record from the Revision step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:

- Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.

The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The View form displays **Task Details** in which you can see who sent you the task, the **Task Due Date**, **Task Status**, any **Task Notes**, and the current step in the workflow.

The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the ***Vendors Evaluations Workflow*** (on page 64).

3) Click the **Accept Task** button. The form dynamically changes to an Action Form with editable fields. You can revise:
   - **Title**
   - **Selected Vendor**
4) When ready, select a workflow action. The choices are:
   - **Resubmit** — this action sends the record back to the **Approval** step in **Pending** status.
   - **Cancel** — This action sends the record to the End step in Canceled status.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
6) Click **Send**.

Viewing a Vendors Evaluations Record on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a Vendors Evaluations record on the End step:

1) Go to the **Company Workspace** tab and click **Company Logs** in the left Navigator. Company logs display a list of the business processes that reside at the company level.
2) Click **Vendors Evaluations**. Unifier opens the business process log.

   When the record is on the **End** step, **Task Details** displays the text "Record has been closed."

3) Click the "**Click here**" link in Task Details to open the Workflow Progress Window. In the Progress Window you can see that the record is on the End step, as well as retrace the record's path in the workflow.
4) Click **View Graphic** to see an image of the workflow.

New User Requests Business Process

Purpose

You can use a New User Requests record to ask an administrator to create a new user.

Business process characteristics

The New User Requests business process is a company-level business process without line items but with workflow. You can create multiple New User Requests records for your company; each record specifies one new user. Integration is defined. An individual help file is available for this business process.

Groups associated with this business process

Company Administrator, Creator, Reviewer, All Company Users

Record Statuses

Pending (non-terminal status), Approved (terminal status), Rejected (terminal status), or Canceled (terminal status)

Additional Information

- Enabled for mobile devices.
- Step completion policy and resolving actions can differ between steps.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

  To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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Routing a New User Requests Record from the Revision Step..... 74
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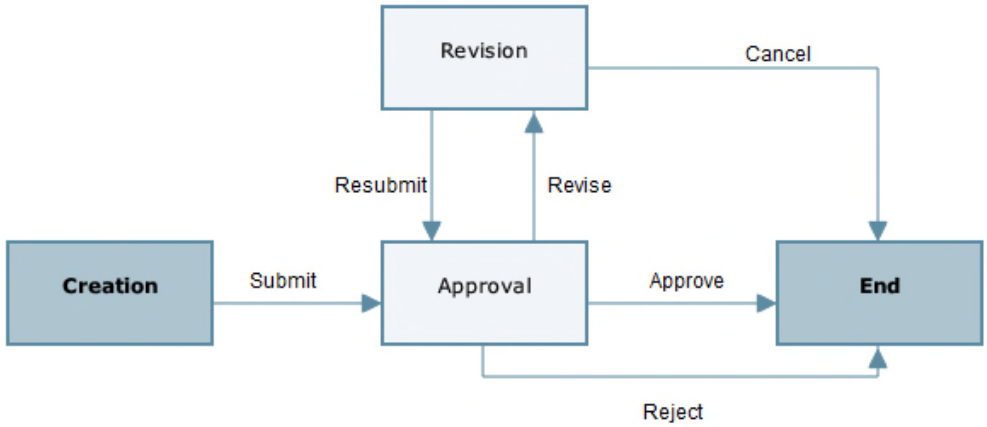
New User Requests Workflow

Below are the four steps of the **New User Requests** workflow.



Creating a New User Requests Record

To create a New User Requests Record:

1) Navigate to the **Company Workspace** tab. Ensure that are in the User mode.
2) Expand the **Company Logs** node, and select **New User Requests.** The New Use Requests log opens.
3) From the BP log page, click **Create**. Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the form.
4) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This action activates **Action Details**.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.

6) Click **Send** to route the record to the **Review** step. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

In this field	Do this
Record Number	This is a read-only field that Unifier populates the first time you send the form to the Approval step.
Title*	This is a required field - Enter up to 16 characters to name the record.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you first send the form to the next step in the workflow.
Due Date	This is a read-only field. Due Date is populated based on the date established in Administration Mode > Work Flow Settings.
Status	This is a read-only field that Unifier populates when you first send the form to the next step in the workflow.
Request Type	Select the request type from the field's drop-down menu.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
E-Mail	Enter the user's email address.
Work Phone	Enter the user's work telephone number.
Mobile Phone	Enter the user's mobile or smart-phone number.
Home Phone	Enter the user's home telephone number.
Fax	Enter the user's fax number.
Title	Enter the user's title.
Company	Enter the user's Company.

Routing a New User Requests Record from the Review Step

Upon sending the business process form forward to the **Review** step, Unifier creates a permanent business process record and sends a task. An assignee can see the task in the **Tasks** log.

To route a New User Requests record from the Review step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

   The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The View form displays **Task Details** in which you can see who sent you the task, the **Task Due Date**, **Task Status**, any **Task Note**s, and the current step in the workflow.

   The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the workflow.
3) Click the **Accept Task** button.
   - You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) When you are ready, select a workflow action. The choices are:
   - **Approve** — this action sends the record to the **End** step in **Approved** status, which triggers auto-creation of the Vendor record.
   - **Revise** — this action sends the record back to the record creator in **Pending** status. The **To** field is preassigned and you can **Cc** anyone listed in Users/Groups.
   - **Reject** — this action sends the record to the **End** step in **Rejected** status.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
6) Click **Send**.

Routing a New User Requests Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the assignee. You can see your active tasks in your **Tasks** log. When your task is complete, you can select one of two Workflow Action options, as described on step 4.

To route a New User Requests record from the Revision step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:

- Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.

The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The View form displays **Task Details** in which you can see who sent you the task, the **Task Due Date**, **Task Status**, any **Task Notes**, and the current step in the workflow.

The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the workflow.

3) Click the **Accept Task** button. The form dynamically changes to an Action Form with editable fields. You can revise:
   - **Title**
   - All fields in the **User Information** block.
4) When ready, select a workflow action. The choices are:
   - **Resubmit** — this action sends the record back to the Approval step in Pending status.
   - **Cancel** — this action sends the record to the End step in Canceled status.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
6) Click **Send**.

Viewing a New User Request on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a Vendor Prequal Requests record on the End step:

1) Go to the **Company Workspace** tab and click **Company Logs** in the left Navigator. The Navigator shows a list of the business processes that reside at the company level.
2) Click New User Requests. Unifier opens the log in the right pane.

   When the record is on the End step, Task Details displays the text "Record has been closed."
3) Click the "**Click here**" link in Task Details to open the Workflow Progress Window. In the Progress Window you can see that the record is on the End step, as well as retrace the record's path in the workflow.

4) Click **View Graphic** to see an image of the workflow.

Blanket Purchase Orders (BPO) Business Process

Purpose

Depending on your business model, you may want to use a Blanket Purchase Order and create an umbrella agreement with a vendor who will provide services across multiple projects. You can have one vendor per Blanket Purchase Order. The Blanket Purchase Order is released on a per-project-period basis; work authorizations are billed against a set maximum cost amount.

Business process characteristics

The Blanket Purchase Order is a non-workflow, company-level, cost-type business process. Each Blanket Purchase Order refers to one Vendor. You can create more than one Blanket Purchase Order for your company. The item logs section of the Blanket Purchase Orders (BPO) record displays a query tab, Work Releases. An individual help file is available for this business process.

Groups associated with this business process

Members of the Company Administrators group can create and edit this business process.

Statuses

Pending or Approved, neither of which are terminal statuses.

Additional Information

- You can add and remove attachments to this business process. You can add, remove, or copy line items, as well as add attachments to line items.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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Creating a Blanket Purchase Order Record

To create a new Blanket Purchase Order record:

1) Navigate to the **Company Workspace** tab, **Company Logs** > **Blanket Purchase Orders**. The Blanket Purchase Order log opens.
2) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can save the form or add line items. See ***Adding Line Items*** (on page 79)

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates the first time you save the form.
Title*	This is a required field - Enter a name for the record.
Record Last Update Date	This is a read-only field that Unifier populates when you save a record.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you initially saved the form and it became a record.
Status	This is a required field - Select the status of the record - Pending or Approved - neither of which is a terminal status.
Contract Number	Enter the contract number.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Contract Type	Select the contract type from the drop-down menu.

In this field	Do this
Vendor*	This is a required field - Click **Select** and choose a Vendor from the Vendors log. You can only pick one vendor. This selection becomes the vendor reference.
Vendor Name	This field is auto-populated with the vendor selection. It is an editable field in which you may change the vendor name. Changing the vendor name does not change the vendor reference.
Address 1	Enter the vendor's address.
Address 2	Use this field as needed.
Address 3	Use this field as needed.
City	Enter the vendor's city.
State/Province	Select the vendor's state or province.
Zip/Postal Code	Enter the vendor's zip or postal code.
Country	Select the vendor's country
Primary Contact	Enter the name of the vendor contact.
Email	Enter the vendor contact's email.
Phone	Enter the vendor contact's phone number.
Fax	Enter the vendor contact's fax number.
Description	Enter up to 4000 characters in this text box.

Item Logs

Line Items Tab

Provides general information about the record.

Work Releases Tab

Use to create a new record as well as view, copy, or find existing records.

Adding Line Items

1) In the **Line Items** section click **Add** or **Grid**. The Line Item form opens.
2) Complete the Line Item form according to the Line Item table below. You must complete all required fields on each line that you entered before you can save the Line Item.
3) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.

Line Item Table

In this field	Do this
Tab Name	You can enter a name for the tab.
Title	Enter a title for the line item
Short Description	This is a required field - Enter a brief description of the item specified on the line item
Item Quantity	This is a required field - Enter the number of items specified on the line item
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost	This is a required field - Enter the price of the item specified on the line item
Amount	This is an auto-calculated field (Item Quantity X Item Unit Cost)

Saving the BPO Record

To save the Blanket Purchase Order, click either:

- **Finish Editing** to save the form in read-only mode.
  - You can return the record to Edit mode by clicking **Edit** on the Blanket Purchase Order record tool bar.
- **Save** to leave the form in edit mode.

Viewing the Blanket Purchase Order Record Summary Sheet

The Blanket Purchase Order record contains a Summary Sheet. This sheet shows line items and the line item's original amount. It also shows what has been allocated to projects. You should then be able to drill in to see what has been assigned to individual projects.

This should also show what has been allocated to projects. You should then be able to drill in to see what has been assigned to individual projects.

To access the Blanket PO Sheet:

1) Complete all required fields in the Upper form.
2) Add line items.
3) Click **Finish Editing**.
4) Close the record.
5) The next time you open the record click the **Summary Sheet** button in the record tool bar. The Blanket PO Sheet opens.
6) Line items and their original amounts appear in the sheet.

Project Requests Business Process

Purpose

You can use a Project Requests record to define basic project information and initiate the approval process for new projects.

Business process characteristics

The Project Requests business process is a company-level business process without line items but with workflow. An individual help file is available for this business process.

Groups associated with this business process

Company Administrator, Creator, Reviewer, All Company Users

Record Statuses

Pending (non-terminal status), Approved (terminal status), Rejected (terminal status), or Canceled (terminal status)

Additional Information

- Enabled for mobile devices.
- Step completion policy and resolving actions can differ between steps.
- Enabled for integration.
- Enabled for publish path.

  Files attached to the business process forms, or to line items, will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form, or to its line items, from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

  To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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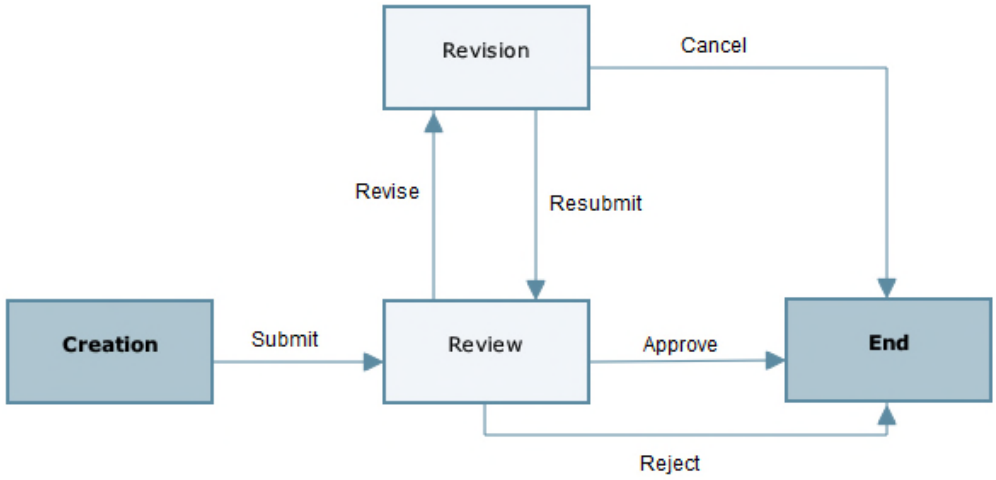
Project Request Workflow

Below are the four steps of the **Project Requests** workflow.



Creating a Project Requests Record

To create a Project Requests Record:

1) Navigate to the **Company Workspace** tab and expand the **Company Logs** node.
2) Click **Project Requests** to open the log.
3) From the BP log page, click **Create**.Complete the form according to the following information.

   Notes:

   - You must enter a value in all required fields (*) before you can save the form.
   - You can save your business process at any time to create a draft. To access your drafts, click **Drafts**.

4) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This action activates **Action Details**.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.

d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.

6) Click **Send** to route the record to the **Review** step. Unifier displays a message stating that the record has been submitted successfully.

Project Request tab (General)

In this field:	Do this:
Record Number	This is a read-only field that Unifier populates the first time you send the form to the Approval step.
Title*	This is a required field - Enter up to 16 characters to name the record.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you first send the form to the next step in the workflow.
Status	This is a read-only field that Unifier populates when you first send the form to the next step in the workflow.

Project Request tab (Project Summary)

In this field:	Do this:
Description	Enter a brief description for the project.
Justification	Enter a brief justification for the project request.

Project Request tab (Project Details)

In this field:	Do this:
Project Name	Enter a name for the project.
Project Type	Select from the list.
Project Manager	Select or enter the name of the project manager.

Project Request tab (Schedule Information)

In this field:	Do this:
Project Start Date*	(*Required*) Enter the start date for the project.
Preferred Completion Date	Enter a date.

Project Shell Information

In this field:	Do this:
Project Number*	Enter a project number.
Shell Location*	Select a shell location for this project.
Shell Templates*	Select a shell template to use.
Status*	Select a status for this project.
Administrator*	Select an administrator for this project.
Created Shell	This is a read-only field.

Project Request tab (Location)

In this field:	Do this:
Address 1	Enter the address of the project.
Address 2	Enter the address of the project.
Address 3	Enter the address of the project
City	Enter the city.
State/Province	Enter the state or province.
Zip/Postal Code	Enter the zip or postal code.
Country	Enter the country.
Latitude	Enter the latitude.
Longitude	Enter the longitude.

Routing a Project Requests Record

After creating and sending the business process form forward to the **Review** step, Unifier creates a permanent business process record and sends a task. An assignee can see the task in the **Tasks** log.

When working on the **Review** step, first you accept the task, then when you are ready, route the record to either the **Revision** or the **End** step.

To route a Project Requests record:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

   The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The business process form opens for viewing. The View form displays **Task Details** in which you can see who sent you the task, the **Task Due Date**, **Task Status**, any **Task Notes**, and the current step in the workflow.

   The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the workflow.
3) From the upper left-hand corner of the window click **Accept Task**.
   - You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) In the Project Request tab, enter values for the following required (*) fields:

   Note: Ensure that you scroll down.
   - Project Name
   - Project Number
   - Shell location (click **Select** to see the list of your options to select)
   - Shell Templates (click **Select** to see the list of your options to select)
   - Status (Click the down-arrow to select **Active**)
   - Administrator (click **Select** to see the list of administrators to select)

   In this case, your selection is **Send for Approval**. This action activates **Action Details**.
5) Select the workflow action to take. The choices are:

- **Approve** — this action sends the record to the **End** step in **Approved** status, which triggers auto-creation of the Vendor record.
- **Revise** — this action sends the record back to the record creator in **Pending** status. The **To** field is preassigned and you can **Cc** anyone listed in Users/Groups.
- **Reject** — this action sends the record to the **End** step in **Rejected** status.

6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
7) Click **Send**.

Timesheets Business Process

Purpose

Employees can use the **Timesheets** business process to record their hours for both project and non-project work. Employers can use this business process to approve employee hours.

Business process characteristics

This is a company-level, line-item, workflow business process from which you can create multiple instances. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status
- Canceled, a terminal status

Groups associated with this business process

Members of the All Company Users group can create the Timesheets business process and send it for review.

Additional Information

- Enabled for mobile and hand-held devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

  To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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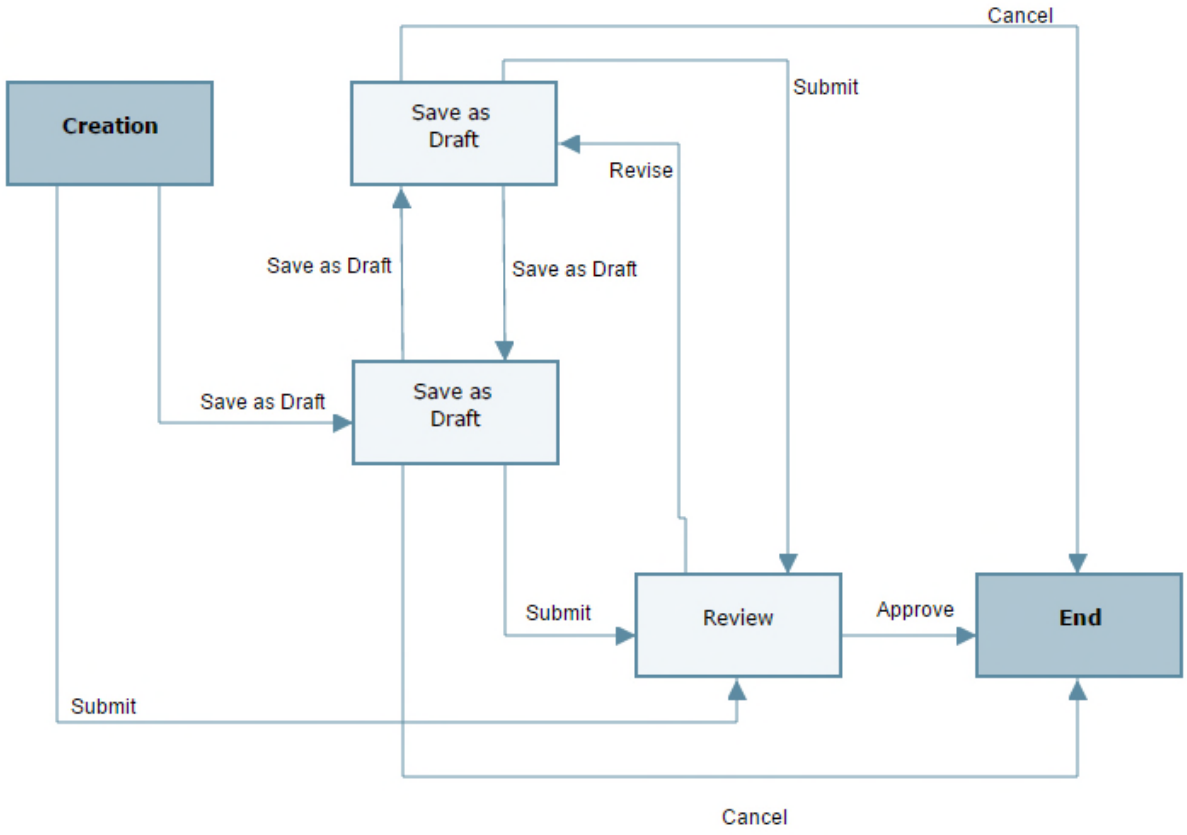
Timesheets Workflow

Below are the five steps of the Timesheets workflow. Notice that there are two Save as Draft steps. The second Save as Draft step is an intermediary step from which you can cancel the record or proceed to the Review step.



Creating a Timesheets Record

To create a Timesheets business process record:

1) Navigate to the **Company Workspace** tab and expand the **Company Logs** node.
2) Click **Timesheets** to open the log.

3) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields.
4) Add line items to the detail form according to your project participation.
   This portion of the form is divided into tabs:
   - Project Hours — Record your project hours on this tab
   - Non-Project Hours — Record your non-project hours on this tab
5) In **Workflow Actions** select the workflow action to take. This action activates **Action Details**. Your selections are:
   - **Save as Draft** — This selection sends the record to the **Save as Draft** step and generates a new task in your Company Workspace **Tasks** log. It also saves the Timesheet record in your Company Workspace **Collaboration** > **Drafts** log.
   - **Submit** — This selection sends the timesheet record to the **Review** step.
6) In **Action Details**, select who should receive the record on the next step.
   a. **To**... is preassigned.
   b. (Optional) Click **Cc**. to copy someone on the Timesheets record. The **User/Groups** picker opens that shows a list of available record recipients.
   c. Select the user or group who will receive a copy of the record on the next step.
   d. Click **Add**.
   e. Click **OK**. The **User/Group** picker closes and the name or group appears in the **Cc** field. Upon sending, the record will appear in the recipient's Company Workspace **Notifications** log.
7) Click **Send** to either send the Timesheet to the **Review** step or to the **Save as Draft** step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you click **Send**.
Title*	This is a required field - Enter a name for the record.
Summary Average Shown	
Week Of*	This is a required field. Use the calendar icon to select the date.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step.

In this field	Do this
Due Date	Unifier pre-populates the date from the workflow setup.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Employee Info block	
Employee*	This is a required field. Select the employee's name using the drop-down menu.
Name	This information is auto-populated from the employee's user profile.
Department	This information is auto-populated from the employee's user profile.
Regular hours	This information is auto-populated from the employee's user profile. You can overwrite this entry if desired.
Employee ID	This information is auto-populated from the employee's user profile.
Title	This information is auto-populated from the employee's user profile.
Manager	This information is auto-populated from the employee's user profile.
Summary Project Hours block	
Monday	This value is auto-populated from the Project Hours tab.
Tuesday	This value is auto-populated from the Project Hours tab.
Wednesday	This value is auto-populated from the Project Hours tab.
Thursday	This value is auto-populated from the Project Hours tab.
Friday	This value is auto-populated from the Project Hours tab.
Saturday	This value is auto-populated from the Project Hours tab.
Sunday	This value is auto-populated from the Project Hours tab.
Total Project Hours	This value is auto-populated from the Project Hours tab.
Summary Non Project Hours block	
Monday	This value is auto-populated from the Non Project Hours tab.
Tuesday	This value is auto-populated from the Non Project Hours tab.
Wednesday	This value is auto-populated from the Non Project Hours tab.
Thursday	This value is auto-populated from the Non Project Hours tab.

In this field	Do this
Friday	This value is auto-populated from the Non Project Hours tab.
Saturday	This value is auto-populated from the Non Project Hours tab.
Sunday	This value is auto-populated from the Non Project Hours tab.
Total Non-Project Hours	This value is auto-populated from the Non Project Hours tab.
Summary Hours block	
Total Hours	This value is calculated and then auto-populated from the Project Hours + Non Project Hours tabs.
Total Overtime Hours	This value is calculated and then auto-populated from the Project Hours + Non Project Hours tabs.

Item Logs

Line Items Tab

In this field	Do this
Project Hours tab	
Project*	This is a required field - Enter the name of the project.
Short Description*	This is a required field - Enter a brief description for the project.
Week Of	Select a date using the date picker.
Monday	Enter your hours for the day.
Tuesday	Enter your hours for the day.
Wednesday	Enter your hours for the day.
Thursday	Enter your hours for the day.
Friday	Enter your hours for the day.
Saturday	Enter your hours for the day.
Sunday	Enter your hours for the day.
Total Project Hours	Unifier automatically calculates the number of project hours.
Non Project Hours tab	
Short Description*	This is a required field - Enter a brief description for the project.
P6 Cost	Enter the currency amount.
Earned Amount	Enter the Earned Amount

In this field	Do this
Total Costs	Unifier automatically calculates the total costs using the formula (Earned Amount - P6 Cost)
Total Regular Hours	Enter the total regular hours.
Total Overtime Hours	Enter the overtime hours.
Total Hours	Unifier automatically calculates the total hours using the formula (Total Regular Hours + Total Overtime Hours)
Days Away from Work	Enter the number of days away from work.
Days	Enter the number of days worked.
Week Of	Select a date using the date picker.
Monday	Enter your hours for the day.
Tuesday	Enter your hours for the day.
Wednesday	Enter your hours for the day.
Thursday	Enter your hours for the day.
Friday	Enter your hours for the day.
Saturday	Enter your hours for the day.
Sunday	Enter your hours for the day.
Total Non Project Hours	Unifier automatically calculates the total of non-project hours.

Routing a Timesheets Record from the First Save as Draft Step

While the Timesheets record is on the **Save as Draft** step you can edit any and all fields.

To route a Timesheets record from the first Save as Draft step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The View form displays **Task Details** in which you can see who sent you the task, the **Task Due Date**, **Task Status**, any **Task Note**s, and the current step in the workflow.

- The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the Timesheets Workflow.

3) Click the **Accept Task** button. The form dynamically changes to an Action Form.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) When ready, select a workflow action. The choices are:
   - **Save as Draft** — this action sends the record to the **Save as Draft** step in **Pending** status.
     - At this point you are on the first Save as Draft step; however, in this workflow there are two Save as Draft steps. See the ***Timesheets Workflow*** (on page 90).
     - You can update the Timesheets record and send it between Save as Draft steps until you are ready to either submit the Timesheets record for approval (from the first Save as Draft step), or cancel the record (from the second Save as Draft step).
     - Sending the record between Save as Draft steps creates a new task for you in your Company Workspace Collaborations > Tasks log each time you click Send.
   - **Submit** — this action sends the record to the record reviewer in **Pending** status.
5) In **Action Details**, select who should receive the record. **To**... is preassigned but you can select message recipients in the **Cc** field.
   a. Click **Cc...** Select the user or group who will receive the record on the next step.
   b. Click **Add**.
   c. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.
6) Click **Send**.

Routing a Timesheets Record from the Second Save as Draft Step

To route a Timesheets record from the second Save as Draft step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

   The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The View form displays **Task Details** in which you can see who sent you the task, the **Task Due Date**, **Task Status**, any **Task Notes**, and the current step in the workflow.

   The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the Timesheets Workflow.
3) Click the **Accept Task** button. The form dynamically changes to an Action Form.

- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Select a workflow action. The choices are:
   - **Save as Draft** — This action sends the record to the **Save as Draft** step in **Pending** status.
     - At this point you are on the second Save as Draft step. See the ***Timesheets Workflow*** (on page 90).
     - You can update the Timesheets record and send it between Save as Draft steps until you are ready to either submit the Timesheets record for approval (from the first Save as Draft step), or cancel the record (from the second Save as Draft step).
   - **Cancel** — this action sends the record to the **End** step in **Canceled** status.
5) Click **Send**.

Routing a Timesheets Record from the Review Step

To route a Timesheets record from the Review step:

1) Navigate to the **Company Workspace** tab and select **Tasks**. The Tasks log opens.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

   The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The View form displays **Task Details** in which you can see who sent you the task, the **Task Due Date**, **Task Status**, any **Task Notes**, and the current step in the workflow.

   The **Task Status** link opens the Workflow Progress window where you can see record and step details as well as access an image of the Timesheets Workflow.
3) Click the **Accept Task** button. The form dynamically changes to an Action Form.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Select a workflow action. The choices are:
   - **Review** — this action sends the record to the **Save as Draft** step in **Pending** status.
     - This is the second Save as Draft step. See the ***Timesheets Workflow*** (on page 90).
     - You can update the Timesheets record and send it between Save as Draft steps until you are ready to either submit the Timesheets record for approval (from the first Save as Draft step), or cancel the record (from the second Save as Draft step).

- **Approve** — This action sends the record to the **End** step in **Approved** status.

5) Click **Send**.

Viewing the Timesheets Record on the End Step

This is the last step in the workflow. You cannot take action on this step because the record is in a terminal status: Approved, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view the record on the End step:

1) Go to the **Company Workspace** tab and click **Company Logs** in the left Navigator. Company logs display a list of the business processes that reside at the company level.
2) Click **Timesheets**. Unifier opens the business process log.

   When the record is on the **End** step, **Task Details** displays the text "Record has been closed."
3) Click the "**Click here**" link in Task Details to open the Workflow Progress Window. In the Progress Window you can see that the record is on the End step, as well as retrace the record's path in the workflow.
4) Click **View Graphic** to see an image of the workflow.

Project Master Data

This node contains BPs that store master data that are used across all projects and are referenced by other BPs.

Change Quote Decision Business Process

Purpose

You can use the Change Quote Decision record to create review decision options that contractors can use when reviewing potential change orders from their sub-contractors. The records you create using this BP, appear as data-picker options in other BPs and sets the workflow path that the Change Orders BP follows.

> **Note**: You must create the following mandatory change quote decision records: (ACCEPT/ Wait for BCR Decision, ACCEPT / Notice to Proceed Immediately, RETURN FOR REVISION, and CLOSE/ No further consideration or action) as they are referenced by other business processes. In addition to creating these mandatory records, you can also create additional records. For more information on creating the mandatory record, see topic *Creating a Change Quote Decision Record*.

Business process characteristics

This is a non workflow business process with no line items. You can access this BP form the All Projects tab. An individual help file is available for this business process.

Groups associated with this business process

Project Administrators can create and edit a change quote decision record.

Record Statuses

Active and Inactive

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Editing a Change Quote Decision Record 100

Creating a Change Quote Decision Record

To create the required records:

1) Navigate to the **All Projects** tab in User mode.
2) Expand the **Project Master Data** node and select **Change Quote Decision**. The Change Quote Decision log opens.
3) From the BP log page, click **Create**.Refer to the table below to enter values for the following fields: **Review Outcome Name**, **Item Number**, **Conditional Routing Logic Value**, **Received and Closed Value**, and **Quote Amount Accepted Value (Yes=1 / No=0)**.
4) In the **Status** drop-down menu, select **Active**.
5) To save the record, click either:

- **Finish Editing** to save the form in read-only mode. You can return the record to edit mode by clicking **Edit** on the record toolbar.
- **Save** to leave the form in edit mode.

6) Repeat steps 3 to 6 to create the other required codes.

Review Outcome Name	Item Number	Conditional Routing Logic Value	Received and Closed Value	Quote Amount Accepted Value (Yes=1/No=0)
ACCEPT/ Wait for BCR Decision	1	1	1	1
ACCEPT / Notice to Proceed Immediately	2	3	1	1
RETURN FOR REVISION	3	0	0	0
CLOSE/ No further consideration or action	4	2	1	0

Editing a Change Quote Decision Record

To edit a Change Quote Decision record:

1) Navigate to the **All Projects** tab in User mode.
2) Expand the **Project Master Data** node and select **Change Quote Decision**. The Change Quote Decision log opens.
3) Open the record you want to revise.
4) Click **Edit** and make the necessary changes.
5) Click **Finish Editing**.

Submittal Revision Approval Code Business Process

Purpose

You can use the Submittal Revision Approval Codes record to create codes that Submittal Managers can use when approving submittal revisions. The records you create using this BP, appear as data-picker options in other BPs related to Submittals. These codes are also used to route the submittal revision records through the workflow. An approval code value of 0 indicates that revision is required, and a value of 1 indicates that no revision of the submittal is required.

> **Note**: You must create the following mandatory submittal revision approval codes: (Final Approval, Not Approved, and Receipt Acknowledged/ Not Subject to Approval) as they are referenced by other business processes. In addition to creating these mandatory codes, you can also create additional codes. For more information on creating the mandatory codes, see topic *Creating a Submittal Approval Codes*.

Business process characteristics

This is a non workflow business process with no line items. You can access this BP form the All Projects tab. An individual help file is available for this business process.

Groups associated with this business process

Submittal Coordinators can create and edit submittal approval codes.

Record Statuses

Active and Inactive

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Editing a Submittal Revision Approval Codes Record 102

Creating Submittal Revision Approval Codes

To create the required records:

1) Navigate to the **All Projects** tab in User mode.
2) Expand the **Project Master Data** node and select **Submittal Revision Approval Codes**. The Submittal Revision Approval Codes log opens.
3) From the BP log page, click **Create**. Refer to the table below to enter values for the following fields: **Approval Code**, **Approval Decision**, **Approved as Noted/Confirmed**, and **Approval Code Value**.
4) In the **Status** drop-down menu, select **Active**.
5) To save the record, click either:

- **Finish Editing** to save the form in read-only mode. You can return the record to edit mode by clicking **Edit** on the record toolbar.
- **Save** to leave the form in edit mode.

6) Repeat steps 3 to 6 to create the other required codes.

Approval Code	Approval Decision	Approval Code Value
OA	Final Approval	1
OR	Not Approved	0
RA	Receipt Acknowledged/ Not Subject to Approval	1

Editing a Submittal Revision Approval Codes Record

To edit a Submittal Revision Approval Code record:

1) Navigate to the **All Projects** tab in User mode.
2) Expand the **Project Master Data** node and select **Submittal Revision Approval Code**. The Submittal Revision Approval Code log opens.
3) Open the record you want to revise.
4) Click **Edit** and make the necessary changes.
5) Click **Finish Editing**.

Submittal Revision Sequencer Process

Purpose

You can use the Submittal Revision Sequencer record to create a revision sequence to identify multiple revisions of a submittal record. The records you create using this BP, appear as data-picker options when creating submittal revisions.

> **Note**: You must create the following mandatory revision sequences (A-Z and 001-999) as it is referenced by other business processes. In addition to these two, you can also create additional revision sequences. For more information on creating the two required sequences, see topic *Creating a Submittal Revision Sequencer*.

Business process characteristics

This is a non workflow business process with no line items. You can access this BP form the All Projects tab. An individual help file is available for this business process.

Groups associated with this business process

Submittal Coordinators can create and edit a submittal revision sequencer.

Record Statuses

Active and Inactive

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Creating a Submittal Revision Sequencer

You can either manually create the A-Z and the 001-999 revision sequencers or import the data using a CSV file. If you are using the Import option, ensure that the file you create matches the data documented in steps 4 to 9.

To manually create the A-Z revision sequencer:

1) Navigate to the **All Projects** tab in User mode.
2) Expand the **Project Master Data** node and select **Submittal Revision Sequencer**. The Submittal Revision Sequencer log opens.

   From the BP log page, click **Create**. A new Submittal Revision Sequencer form opens.
3) In the **Title** field, enter **A - Z**.
4) In the **Status** drop-down menu, select **Active**.
5) Click **Grid.**
6) In the **Rev#** field, enter the alphabets from **A** to **Z**.

7) In the **Sequence#** field, enter numbers from **1** to **26**.
8) In the **Short Description** field, enter numbers from **001** to. **026**. This is a required field.
9) Click **Save** to save the Item log.
10) To save the record, click either:
    - **Finish Editing** to save the form in read-only mode. You can return the record to edit mode by clicking **Edit** on the record toolbar.
    - **Save** to leave the form in edit mode.

To manually create the 001-999 revision sequencer:

1) Navigate to the **All Projects** tab in User mode.
2) Expand the **Project Master Data** node and select **Submittal Revision Sequencer**. The Submittal Revision Sequencer log opens.
3) In the toolbar click **New**. A new Submittal Revision Sequencer form opens.
4) In the **Title** field, enter **001-999**.
5) In the **Status** drop-down menu, select **Active**.
6) Click **Grid.**
7) In the **Rev#** field, enter the numbers from **001** to **999**.
8) In the **Sequence#** field, enter numbers from **1** to **999**.
9) In the **Short Description** field, enter numbers from **001** to. **999**. This is a required field.
10) Click **Save** to save Item log.
11) To save the record, click either:
    - **Finish Editing** to save the form in read-only mode. You can return the record to edit mode by clicking **Edit** on the record toolbar.
    - **Save** to leave the form in edit mode.

Editing a Submittal Revision Sequencer Record

To edit a Submittal Revision Sequencer record:

1) Navigate to the **All Projects** tab in User mode.
2) Expand the **Project Master Data** node and select **Submittal Revision Sequencer**. The Submittal Revision Sequencer log opens.
3) Open the record you want to revise.
4) Click **Edit** and make the necessary changes.
5) Click **Finish Editing**.

Portfolio Manager (Capital Planning)

In general, Capital Planning enables a company:

- Manage the current and proposed capital projects that are aligned with the strategic goals
- Prioritize projects based on available budgets

PCP (in Unifier Portfolio Manager) is used for managing budget forecasts for ongoing and planned projects in a company.

The following sections provide details about PCP and is based on the default setup of Unifier.

> **Note**: There are no business processes (BPs) designed and set up for use with PCP.

Using PCP

PCP helps the portfolio planners:

- Create multi-year financial plans to determine which projects to undertake.
- Set up criteria for inclusion of planned and ongoing projects into the plan.
- Facilitate top-down (assign budget from capital plan) and bottom-up (assign budget at project level) PCP.
- Create multiple scenarios to compare and achieve optimal budget and forecast distributions aligned to strategic goals.
- Facilitate collaboration with project managers.

In Unifier, two factors impact PCP directly:

- Portfolio Manager: at a higher level within the Shell hierarchy (e.g., All Projects)
- Cash Flow: at a lower level within the Shell hierarchy (e.g., Projects)

Using the PCP entails using the Portfolio Manager to gather cost and schedule information on ongoing and planned projects and perform analyses on "what if" scenarios. See the ***Accessing Portfolio Manager*** (on page 110) section for details.

During scenario analysis, the portfolio planner will likely contact the project managers to negotiate numbers and dates. This exchange of information continues until all parties involved reach an agreement.

> **Note**: Before you use the Project Controls base product, you need to prepare and configure the data that you need for using each component, in Unifier. Refer to the *Unifier User Guide* for instructions on how to prepare and configure the necessary data.

Administrators can refer to the *Unifier Administration Guide* to learn more about the following related topics:

- Portfolio Manager cash flow data sources:

  In Unifier: Company Workspace (Admin mode) > Standards & Libraries > Cash Flow > Data Sources
- Project Cash Flow - Capital Planning:

  In Unifier: Company Workspace (Admin mode) > Templates > Shells > Projects > Project Template > Cost Manager > Cash Flow

The following sections provide details about PCP and is based on the default setup of Unifier.

Portfolio Manager

The core of PCP is the Portfolio Manager.

Portfolio management entails collaboration and negotiation between you, as the budget forecast planner (planner), and the project managers in your company.

The Portfolio Manager node:

- Allows budget forecast planners (planners) to gather cost and schedule information on ongoing and planned projects.
- Allows the planners to analyze on "what if" scenarios. These scenarios are used to propose an optimal mix of projects for a portfolio, based on available budget targets and the strategic goals of the company.

PCP provides an efficient collaboration between the Portfolio Manager and Cash Flow (Cost Manager) in Unifier.

Cash Flow and Capital Planning

Cash flow is the movement of money in or out of a business or project during a specific time period.

At their respective project levels, project managers maintain project information and create cash flow budgets and projections in the Cost Manager. This information is used in the Portfolio Manager scenario sheets. See ***Portfolio Manager: Portfolio Scenario Sheet*** (on page 108) for more information about scenario sheets.

With the Primavera Capital Planning (PCP), you receive a PCP cash flow record with a family of curves to support PCP needs. Following are the curves that are included:

- Baseline
- Forecast
- Original Budget
- Shared Budget
- Approved Budget
- Actuals

Once your projects are in operation and your Portfolio Manager sheets are set up, Unifier collects budget, forecast, and actuals data from the project cash flow curves.

A preconfigured worksheet, Project Cash Flow - Capital Planning, is provided in a project cash flow module.

After the project manager provides baseline data, the worksheet enables the planner to view the data and then manipulate it as needed to fit the budgetary and organization priorities for a portfolio.

In the bottom-up method of PCP, project cash flow management includes the following steps:

- Establish a baseline spending plan. (Yearly baseline values become the data sources for a portfolio scenario.)
- Negotiate budgets and dates with planner.

- Work with budget approved by planner.

For details about Cash Flow, Cash Flow Curves, and Cash Flow Worksheets refer to the *Unifier User Guide*.

Portfolio Manager: Portfolio Planner

A portfolio planner can create scenarios to plan an optimal portfolio of projects for the company, based on available budget targets and strategic goals.

Portfolio management entails collaboration and negotiation between you, as the budget forecaster, and the project managers in your company. At their respective project levels, project managers maintain project information and create cash flow budgets and projections in the Cost Manager.

During a scenario analysis, you can:

a) Apply regional budget targets
b) Group the projects in the scenario according to project characteristics
c) Sort and filter the rows of project data and analyze the summary totals
d) Accept the project managers' budget numbers or propose new numbers
e) Accept the schedule dates, or remove or postpone planned projects
f) Create additional scenarios to reflect other possible forecasts

> **Note**: The numbers you propose in a scenario will *not* affect a project's live data. Your proposed numbers are stored only in the Portfolio Manager and will *not* affect live project data until a scenario has been approved by your company management.

During the scenario analysis, the portfolio planner collaborates with the project managers to negotiate the numbers and dates until they reach an agreement.

The project managers do not see the changes the portfolio planner makes on the portfolio scenario sheet because a portfolio manager deals with multiple projects but each project manager deals with only one project and may not have permission to access the information about another project.

To communicated the portfolio scenarios to the project managers:

The portfolio planner must share the portfolio scenarios (see ***Scenario Tab*** (on page 114)) with the project managers and the project manager must:

- Have access to the project Cash Flow module
- Set up Cash Flow Curves accordingly (Shared, Original, Approved)

The Cash Flow Curve shows the portfolio planner's proposed budget numbers for the project. The project manager can include the Cash Flow Curve on the Cost Worksheet (along with the forecast budget or any other budget curve) in order to see the difference between the project numbers and the portfolio planner's proposed budget numbers.

After the portfolio manager completes the budget forecast analysis, using scenarios, and the project manager approves the results, the portfolio manager can mark the scenario as Approved.

Portfolio Manager: Portfolio Scenario Sheet

Portfolio planners can create a portfolio for a specific "planning horizon" (for example, from 2020 through 2026) and then create multiple *scenarios* in that portfolio.

Each *scenario* can use forecast numbers and actuals for both planned and active projects.

The *portfolio scenario* sheets have been set up to pull in the following data from your projects:

- General project information
- Project start and end dates
- Cash flow data (both forecasted and actual) from each project's Cost Manager

With this data, planners can forecast costs over a specific time period (called a "planning period"). They can then manipulate scenarios by:

- Including or excluding projects
- Pushing start dates for planned projects into the future
- Modify project end dates to change the project's duration
- Proposing different cash flow distribution numbers by manually editing the cash flow columns
- Negotiating proposed budgets with project managers

Once these scenario analyses have been completed, the best scenarios can be sent to the executive decision makers for approval.

Once a scenario has been approved, Unifier:

- Marks the approved scenario "shared" so that project managers can see the approved dates and numbers. The scenario is set to read-only mode and can no longer be modified or deleted.
- Updates each projects' original budget numbers with the proposed numbers on the approved scenario.
- Updates each projects' monthly or yearly cash flow numbers with the proposed numbers on the approved scenario.
- Updates the project start date (if it was changed) for any planned projects that will begin during the portfolio's planning period.
- Locks the budget and cash flow numbers to prevent any further changes.

With Primavera Capital Planning (PCP), you receive a template for the portfolio scenario sheets that you use to create the scenarios for analyzing and forecasting capital budgets. The template has been set up to automatically add all your active projects to the sheet as rows.

The template contains:

- The planning options for the portfolio scenario sheet, such as the period structure and data linking options

- Project phases that identify a project as planned or in execution
- The data sources to be used for the analysis, such as project dates and cash flow sources
- The query that will extract the project data that should be included on the scenario
- The column layout that will appear on the scenario sheet

In general, a portfolio scenario sheet contains a list of available projects in a given scenario. See the ***Project Portfolio Manager*** (on page 111) section for more details. Unifier populates the portfolio scenario sheet with all the projects that have met the criteria for inclusion (the budget and projection numbers are from Cost Managers node, and the project start and end dates are from project information). See ***Creating a New Portfolio Scenario Sheet*** (on page 125) section for more details.

Portfolio Manager: Cash Flow Budget Curves

Portfolio Cash Flow budget curves are part of the Cost Manager function. Users in the project can view Cash Flow budget curves from the Cash Flow node of the Cost Manager.

There are three Portfolio Cash Flow Budget Curves:

- A **Shared Budget** curve. This curve shows your proposed numbers for the project. The project manager will not have access to this curve until you share a scenario. The project manager can include this curve on the cost worksheet, along with the forecast budget, or any other budget curve, in order to see the difference between the project's numbers and your proposed budget numbers.
- An **Approved Budget** curve. When a scenario is approved in the Portfolio Manager, the budgets for each project in the scenario are marked "approved." They are then locked and stored in the Portfolio Manager. An Approved Budget curve shows the approved budget for the project for that planning period (usually a year).
- An **Original Budget** curve. This curve is for a project in execution. This budget is the last approved budget for the project before it moved into its execution phase. This approved budget becomes the project's original budget; and this original budget, plus any changes that occur to the numbers during the life of the project, becomes the project's approved budget.

For example, an **approved budget** for the year 2015 might include a planned project for road construction that is scheduled to begin in 2017 with a budget of $100,000. The approved budget for the year 2016 will continue to include the planned road construction budget, with an addition of $15,000 to the forecasted budget. In the year 2017, the road construction project goes into execution, and the approved budget is $115,000. This figure becomes the **original budget** for the road construction project. From then on, as budget forecasting continues, the approved budget for the road construction will be the original budget, plus any changes that occur to the numbers during the life of that project.

Viewing the Portfolio Cash Flow Budget Curves

With the Primavera Capital Planning (PCP), you receive a capital planning cash flow that shows the following curves in an S-curve display. This cash flow is an aggregate of these curves for all the projects in the scenario.

- Baseline
- Forecast
- Original Budget
- Shared Budget
- Approved Budget
- Actuals

Once projects are in operation and portfolio scenario sheets are set up, Unifier collects the curve data from the Cost Sheet in each project and produces the capital planning cash flow curves.

The produced cash flow curve contains a "shared" budget curve that shows the portfolio planner's proposed numbers for the project.

Project managers do not see the changes the portfolio planner makes on a portfolio scenario sheet. Instead, the project managers can include this curve on their cost worksheet, along with the forecast budget, or any other budget curve, in order to see the difference between the project numbers and the portfolio planner's proposed budget numbers.

To view the portfolio cash flow curve:

1) Go to the **All Projects** tab and switch to **User Mode**.
2) Open the project in which you want to see the cash flow curve.
3) In the left Navigator, click **Cost Manager > Cash Flow** and open the cash flow in the right pane.

Accessing Portfolio Manager

Notes:

- The following instructions are only applicable if you have prepared and configured the necessary data that you need for using this feature in Unifier.
- Before you continue, set your preferences in Unifier. Refer to the *Unifier User Guide* for details.

To access the Portfolio Manager node, **Sign in** to Unifier. Refer to the *Unifier User Guide* for additional information.

1) Open **All Projects** tab.
2) Switch to **User** mode. The Portfolio Manager node appears in the Navigator.

Note: The administrator sets up the structure of the nodes and modules in the Navigator. BPs could appear in folders that are placed in appropriate nodes.

The following sections provide details about using the PCP BPs and is based on the default setup of Unifier.

Viewing Portfolios

Note: The following instructions are only applicable if you have prepared and configured the necessary data that you need for using this feature in Unifier.

To view portfolios

1) Go to the **All Projects** tab and switch to User Mode.
2) In the Navigator, Click **Portfolio Manager** to expand the node and to see the portfolio types currently loaded into Unifier.
3) Click **Capital Projects** (portfolio type) node to see the available Capital Projects portfolios in the right-hand pane.

Opening Portfolios

To open a portfolio

1) Go to the **All Projects** tab and switch to User Mode.
2) In the Navigator, Click **Portfolio Manager** to expand the node and to see the portfolio types currently loaded into Unifier.
3) Click **Capital Projects** (portfolio type) node to see the available Capital Projects portfolios in the right-hand pane.
4) Click to select a portfolio and click **Open**. Unifier opens the portfolio in the Project Portfolio Manager window (see the ***Project Portfolio Manager*** (on page 111) section).

Project Portfolio Manager

The Project Portfolio Manager window lists the projects and the projects portfolio scenarios (represented in tabs). Collectively, the items listed in the Project Profile Manager window is referred to as the portfolio scenario sheet, which contains a list of available projects in a given scenario (Portfolio > Projects > Scenarios).

The portfolio scenario sheet is populated with all active projects in the company. The link icon in front of each row indicates that projects are linked to the scenario and data is drawn from Project Details and the Cash Flow worksheet.

Toolbar

The Project Portfolio Manager toolbar options are:

Save icon

To save changes made in the portfolio scenario sheet.

Link/Unlink

To link or unlink one or multiple projects. When linked, project data is updated when you open the sheet. Projects become unlinked when you modify data on the sheet.

Properties

To view the portfolio's properties.

Export

To export an Excel file of the data structure.

Columns

The information about each project in a portfolio, and within a scenario, is presented in columns in the Project Portfolio Manager window.

The columns in the Project Portfolio Manager window contain the following information:

> **Note**: Use the horizontal scroll bar, at the bottom of the Project Portfolio Manager window to move through the columns.

If you (the portfolio planner) move your computer pointing device (mouse pointer) over each of the first seven column label (starting with Project Name), a drop-down arrow displays automatically on the right-hand side of the column label box. Use the drop-down list to sort, group, clear grouping, and filter the information presented in each column.

If you click on the column label (all columns), you can sort the rows according to the information presented in the column that you clicked.

Item number

Contains an automatically assigned number.

Link

- If a link icon is present, then the project is linked to the project data, and the application updates the data on the portfolio scenario sheet as soon as you open the sheet.
- When the portfolio planner creates a portfolio scenario sheet, Unifier populates the portfolio scenario sheet on with all the projects that have met the criteria for inclusion on the portfolio scenario sheet.

  > - **Note**: These criteria were set up in a query that was included in the Portfolio Manager module under Configuration node (Company Workspace - Admin mode).

- When a column value is edited, Unifier automatically unlinks that project row from the project data. The modified cell values are italicized, indicating a discrepancy between scenario and project data, and the row is tagged in the first column.

Project Name

- The name of the project in the portfolio.
- You cannot edit the Project Name.

Project Number

- The number assigned to the project in the portfolio.
- You cannot edit the Project Number.

Project Type

- The type of the project in the portfolio.
- You cannot edit the Project Type.

Project State

The Project State column shows that the scenario includes planned and current projects.

Estimated Budget

The estimated budget amount is set by the project manager.

Start Date

The start date is set by the project manager.

End Date

The end date is set by the project manager.

Pre-Actuals

Pre-Actuals represents the Actuals sum of all previous actuals, up to current date. If checked mid year, the Pre-Actuals also represents the sum of all previous actuals and forecast values, up to the end of year.

Total

- Indicates the project total budget amount,
- Automatically updated by Unifier.

Cash flow columns for each year in the planning period

- Unifier collects the budget and projection numbers from the Cost Managers node of each of your projects and displays them in the cash flow columns.
- The year columns display a range of five years. The first two columns are broken into months, corresponding to the data distribution in project cash flow. You can click the double-arrow to collapse the year columns. Sort, column, and filter options are available in each year and month column.

See the following sections for more details:

- ***Hiding or Showing Columns*** (on page 121)
- ***Filtering Information on Portfolio Scenario Sheet*** (on page 121)

Total

The total section is located below the list of projects and provides the following information:

Total

Captures cash flow totals, showing the sum of the amounts in each numeric column.

Target

Allows the portfolio planner to enter a target number designated for the time period, manually.

Difference

Automatically calculates the difference between the target number and total in each column.

Splitter Arrows

In some portfolio scenario sheets, you may see two large arrows (splitter arrows) at the bottom of the Project Portfolio Manager window, left-hand corner. The portfolio planner can use the splitter arrows to split the windows and add additional projects, from project candidates list, to the portfolio manually.

The option for manually adding projects to the portfolio can be set up by the Administrator.

Company Workspace (Admin mode) > Configuration > Portfolio Manager > Capital Projects > Query tab > Projects: If selected, deselect "Auto-add/auto-remove projects to and from the portfolio based on the query."

Note: Changing this option applies to new portfolios, only.

Current Project Data

The Current Project Data section is located below the totals and provides the current project data for any project (row) that you select.

When a column value is edited, Unifier automatically unlinks that project row from the project data. The modified cell values are italicized, indicating a discrepancy between scenario and project data, and the row is tagged in the first column.

See the following sections for more information about project data:

- ***Accessing Project Data*** (on page 117)
- ***Editing Project Data*** (on page 118)

Scenario Tab

In addition to the list of projects in a profile, the Project Portfolio Manager window displays the projects portfolio scenarios (represented in tabs). The Scenario tabs are located below the total grid.

Note: After the portfolio planner completes the budget forecast analysis, using scenarios, and the project manager approves the results, the portfolio manager can mark the scenario as Approved.

The portfolio scenario sheet enables a planning manager to modify values and see the resulting budget analysis immediately. The following values on the portfolio scenario sheet can be edited:

- Cash flow projections
- Targets for cash flow and numeric columns
- Start Date and End Date for planned projects

Unifier dynamically updates totals and calculates the difference between target numbers and totals.

> **Note**: The values proposed in a scenario do not impact the live data within a project until the scenario is approved.

If a project manager does not have permission to view a scenario, the planning manager can share it. This enables a project manager to view the difference between initial baseline projections and the planning manager's proposed numbers.

> **Note**: The planning manager can undo a previously shared or approved scenario to make future changes.

When a column value is edited, Unifier automatically unlinks that project row from the project data. The modified cell values are italicized, indicating a discrepancy between scenario and project data, and the row is tagged in the first column.

Linking and Unlinking Projects

When you create a scenario, Unifier populates the sheet with all the projects that have met the criteria for inclusion on the sheet.

> **Note**: The criteria were set up in a query that was included in the Portfolio Manager configuration.

This is a dynamic process that occurs whenever you open a portfolio scenario sheet. The projects that appear on the sheet will fluctuate, depending on whether they still meet the criteria for inclusion. For example, a project that was previously on the portfolio scenario sheet may be dropped from the sheet if it no longer meets the query criteria and another project may be added to the sheet because it now meets the query criteria.

According to the Portfolio Manager configuration, all the projects on the scenario sheet will be automatically linked when you first open the portfolio scenario sheet.

The data on the portfolio scenario sheet is linked to the project data and is updated every time you open the sheet.

Any new project that is added to the sheet will also be linked.

You can unlink one or multiple projects from the portfolio scenario sheet. If projects are unlinked, the data on the portfolio scenario sheet is not linked to the project data and will not be updated by changes in the project data. In addition, any new project that is added to the sheet will also be unlinked. See the ***Columns*** (on page 112) section for additional information.

To link a project back to the sheet:

1) Select the project rows that you want to link.
   - For a single project row, click the link icon in the second column, or click the **Link**/**Unlink** button.
   - For multiple project rows, click the **Link/Unlink** button.

   When the project is linked, Unifier will display a link icon in the second column beside the names of the projects.
2) Click the **Save** icon.

To unlink a project from the scenario sheet:

1) Select the project rows that you want to unlink.
   - For a single project row, click the link icon in the second column, or click the **Link**/**Unlink** button.
   - For multiple project rows, click the **Link**/**Unlink** button.

   When the projects are unlinked, Unifier will delete the link icon in the second column beside the names of the projects.
2) Click the **Save** icon.

   You can also unlink a project by editing any cell in the row. Once you start editing, Unifier will automatically unlink the project from the project data.

   If an unlinked project shows a discrepancy between the actual project data and the data you entered on the sheet, Unifier will display the numbers in italics and flag the actual cell data that differs with a dark bar.

Removing a Project from a Portfolio Scenario Sheet

Although the Portfolio Manager has been configured by Unifier to automatically add and remove projects to and from a portfolio scenario sheet (when they meet the correct inclusion or exclusion criteria), the portfolio planner can also manually remove a project from the portfolio scenario sheet. See the ***Splitter Arrows*** (on page 114) section for additional information.

The portfolio planner can use the splitter arrows to split the windows and add additional projects, from project candidates list, to the portfolio manually.

You can use the up arrow or down arrow on the splitter bar to add or remove projects.

The project candidate list shows only those projects that have not been added to any other portfolio for the same planning period. Also, the project candidate list does not show any projects that have already been added to the scenario.

When you remove a project from a portfolio scenario sheet, Unifier moves the project back to the project candidates list at the bottom of the window. If that project continues to match the query criteria for inclusion on the portfolio scenario sheet, it will remain on the candidates list; otherwise, it will drop from the list.

To remove a project:

1) Select the project that you want to remove from the portfolio scenario sheet.
   - To select multiple projects, hold down the CTRL key on your keyboard and click on the projects.
   - To select all the projects, highlight the first project, then hold down the SHIFT key and select the last project.
2) Click the remove arrow (down arrow). Unifier removes the project from the portfolio scenario sheet and recalculates the numbers.

Editing Numbers on a Portfolio Scenario Sheet

A primary function of portfolio scenario sheets is:

- To make it easy for the portfolio planner to modify numbers
- To see the resulting budget analysis quickly.

The portfolio planner can edit the following numbers on the portfolio scenario sheet:

- Cash flow projections
- Targets for cash flows and numeric columns
- Start and end dates for planned projects

When the portfolio planner edits any of these numbers, Unifier dynamically updates totals and calculates the differences between target numbers and those totals; however, Unifier *does not change* a project live data.

The portfolio planner's proposed numbers are stored only in the Portfolio Manager and do not impact live project data until a portfolio scenario sheet has been approved by the company management.

> **Note**: When the portfolio planner edits numbers in a project row, Unifier automatically unlinks that project row from the project data.

To edit numbers on the sheet:

1) Double-click the cell containing the number you want to change. The cell becomes editable.

   > **Note**: If any yearly projections have been broken down into months, the portfolio planner must make edits in the month cells and not in the yearly total.

2) Enter the change.
3) Press the **Enter** key on your keyboard, or press the Tab key to move to the next editable cell in the row.

   Unifier updates the values in the Total and Difference rows for this column, and flags the cell to indicate that there is a discrepancy between the number you entered and the project data.

   > **Note:** To leave a cell without saving changes, press the **Esc** key on the keyboard. Unifier restores the original numbers to the cell.

4) Click **Save All**.

Accessing Project Data

During the planning cycle, you (the portfolio planner) might need quick access to project data in order to view project characteristics, schedule activities, cost data, cash flow data, and other information.

In addition, you might need to update some of this data as you are working on a scenario.

For this purpose, the project names on a scenario sheet are hyperlinked to the project. If you have permissions, you can open the project's landing page from the scenario sheet and view or edit data directly in the project.

To drill down to project data:

1) On the scenario sheet, click the hyperlinked project name. Unifier opens the project landing page in a new window.
2) From the project landing page, navigate to project data and view or edit the data directly.

> **Note**: The portfolio scenario sheet remains open in a separate window so that you can easily work on both the project data and the scenario sheet at the same time.

Editing Project Data

Your portfolio scenario sheets typically contain some project data or information. If this project information was configured to be editable, you (the portfolio planner) can edit it.

If you edit the project information, the changes that you make do not impact the project live data.

Instead, your edits are stored only in the Portfolio Manager and do not impact the live project data until the pertinent portfolio scenario sheet has been approved by your company management.

When the portfolio scenario sheet is approved, Unifier updates specified edited shell information with the approved portfolio scenario sheet data, and you will be notified by email of the updates.

You cannot edit:

- Project name
- Number
- Status
- Location

> **Note**: When you edit information in a project row, Unifier automatically unlinks that project row from the project data.

To edit project information:

1) Double-click the cell containing the information you want to change. The cell becomes editable.
2) Enter the change.
3) Press the **Enter** key on your keyboard, or press the **Tab** key to move to the next editable cell in the row.

   Unifier updates the information in this column, and flags the cell to indicate that there is a discrepancy between the data you entered and the project's data.

Note: To leave a cell without saving your changes, press the **Esc** key on the keyboard. Unifier restores the original numbers to the cell.

4) Click **Save All**.

Changing Start Dates

You (the portfolio planner) can change the start dates of planned projects, but you cannot change the start dates of the projects that are in execution stage.

When you change a start date, Unifier shifts the end date to preserve the project duration. Unifier also shifts the cash flow numbers (excluding pre-actuals) left, or right, to preserve the cash flow distribution.

To change a start date:

1) Double-click the date in the **Start Date** column. Unifier displays a calendar.
2) Choose the new date from the calendar and press the **Enter** key on your keyboard.
   Unifier shifts the end date and the cash flow numbers to reflect the change.

Before date change:

Start Date	End Date	Pre-Actuals	Total	2012	2013	2014	2015	2016
12/26/2011	05/31/2013	$7,777.78	$994,444.44	$892,222.22	$102,222.22	$0.00	$0.00	$0.00

After date change:

Start Date	End Date	Pre-Actuals	Total	2012	2013	2014	2015
04/26/2012	09/29/2013	$7,777.78	*$994,444.44*	*$494,444.44*	*$500,000.00*	$0.00	$0.00

How Unifier Distributes Cash Flow

Unifier stores all cash flow amounts by month in the database. The logic Unifier uses to distribute cash flow dollars is rendered in monthly allocations and presented as follows:

- If you move the start date backwards by (for example) three months, Unifier will move all the cash flow amounts (excluding the pre-actuals column) left by three months and display a zero dollar amount in the last three month columns for that year. Amounts from the following fiscal year will not move left.
- If you move a start date forward by three months, Unifier will move all the cash flow amounts (excluding the pre-actuals column) right by three months and display a zero dollar amount in the first three month columns. The cash flow amounts will continue to move forward in time, replacing the values of the next three months with the values of the past three months. If the cash flows through multiple years, the total for the next year will increase by the three months' amount, and the monthly cash flow for the last three months of the previous year will replace the new year's first three months. The rest of the new year's monthly values will move forward three columns.

Changing Cash Flow Amounts

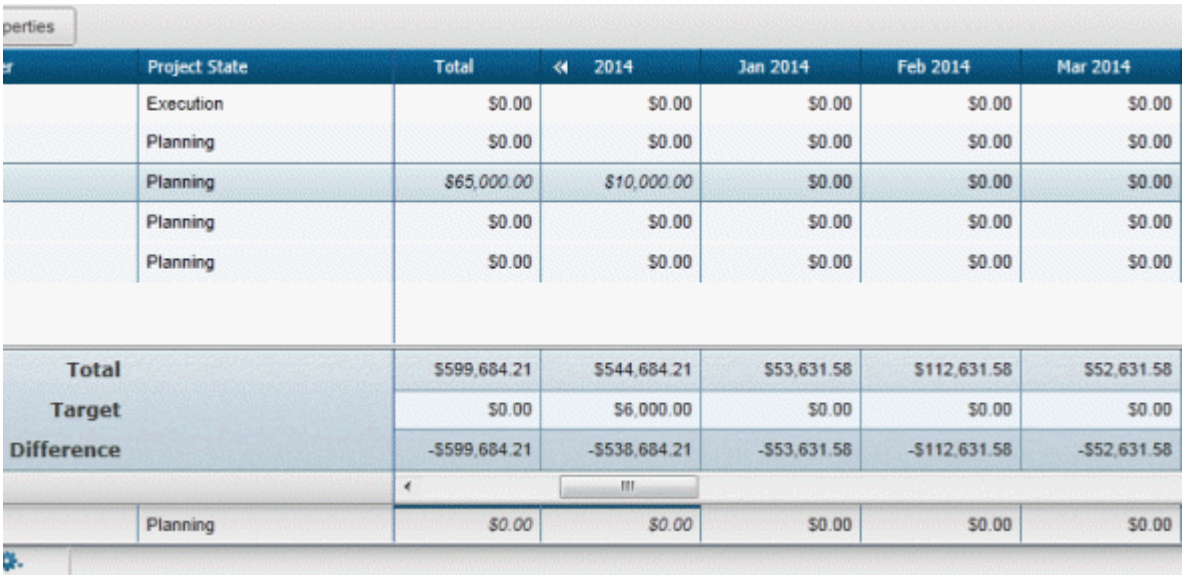
You can change the cash flow amounts of any project on the sheet, planned or in execution. When you change a number in the cash flow amounts, Unifier unlinks the project from the live project data. See the ***Portfolio Manager: Cash Flow Budget Curves*** (on page 109) section for additional information.

To change a cash flow amount

1) Double-click the cell containing the amount you want to change.
2) Enter your change and press the **Enter** key on your keyboard.

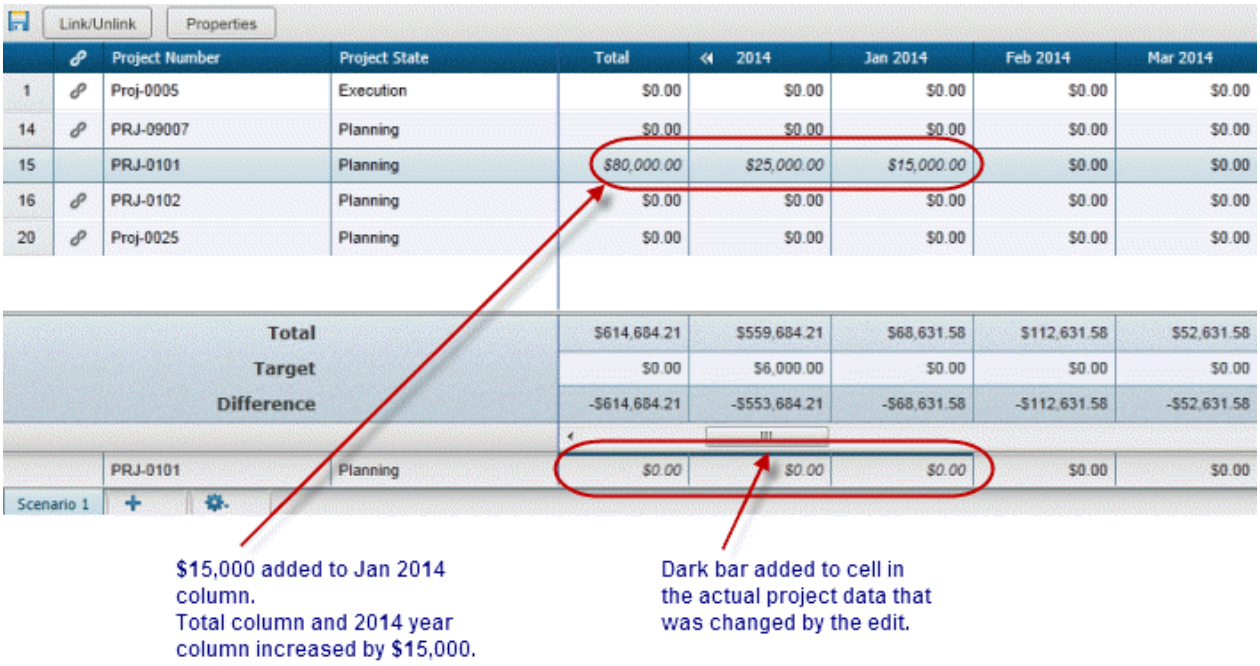
   The project's **Total** amount and the year's total amount increases or decreases by the amount you entered. Unifier calculates the difference, indicates the edited column amounts in italics, and also places a dark bar at the top of the cell in the actual project data.

Before change:



	Project State	Total	2014	Jan 2014	Feb 2014	Mar 2014
	Execution	$0.00	$0.00	$0.00	$0.00	$0.00
	Planning	$0.00	$0.00	$0.00	$0.00	$0.00
	Planning	*$65,000.00*	*$10,000.00*	$0.00	$0.00	$0.00
	Planning	$0.00	$0.00	$0.00	$0.00	$0.00
	Planning	$0.00	$0.00	$0.00	$0.00	$0.00
Total		$599,684.21	$544,684.21	$53,631.58	$112,631.58	$52,631.58
Target		$0.00	$6,000.00	$0.00	$0.00	$0.00
Difference		-$599,684.21	-$538,684.21	-$53,631.58	-$112,631.58	-$52,631.58
	Planning	*$0.00*	*$0.00*	$0.00	$0.00	$0.00

After change:



Hiding or Showing Columns

To make viewing information easier on either the scenario sheet or the project candidate list, you (the portfolio planner) can hide any cash flow columns that might not contain data relevant to your current task.

To hide columns:

1) Click the arrow beside the column name and choose Columns.
2) On the list that appears, select the check box beside the columns you want to hide. Primavera Unifier removes those columns from view.

To show columns:

1) Click the arrow beside the column name and choose Columns.
2) On the list that appears, de-select the check box beside the columns you want to show. Primavera Unifier opens those columns to view.

See the ***Columns*** (on page 112) section for additional information.

Filtering Information on Portfolio Scenario Sheet

To make viewing project information easier, you (the portfolio planner) can use filters on both the scenario sheet and the project candidate list to narrow the focus of information to particular specifics, such as a date range, or a budget amount.

See the ***Columns*** (on page 112) section for additional information.

For example, you might want to see only those projects in a specific date range, or only those projects with budgets greater than a specific amount, or projects of a specific type.

How you filter information depends on the column you choose to use as a filter.

To filter information using a text column:

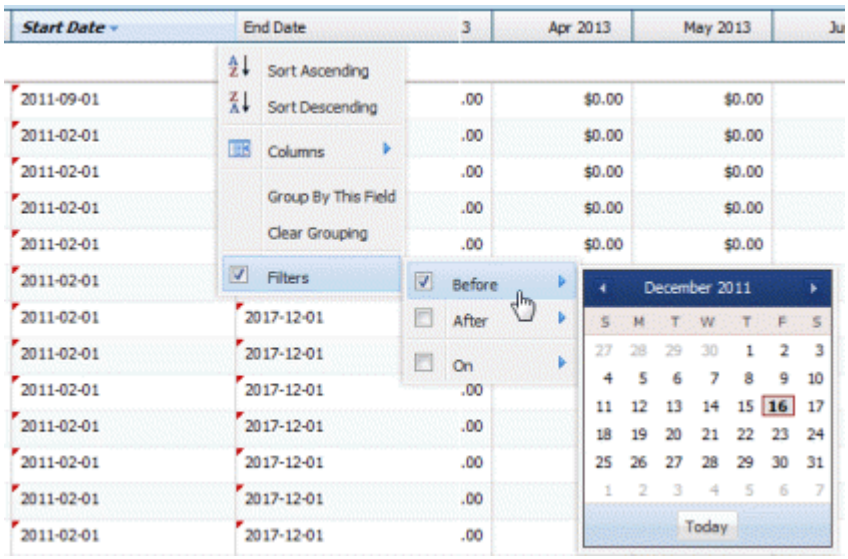
1) Click the arrow beside the column name and choose Filters.
2) In the text box that appears, enter the text you want to use as a filter, such as a project name or prefix.

   Unifier displays those projects that match the text you entered.

To filter information using a date column:

Click the arrow beside the column name and choose **Filters**.

- Choose **Before** to specify a date period before a particular date. Click the date on the calendar that appears. Unifier displays all the projects with a date value that occurs before the date you specified on the calendar.
- Choose **After** to specify a date period after a particular date. Click the date on the calendar that appears. Unifier displays all the projects with a date value that occurs after the date you specified on the calendar.
- Choose **On** to specify a specific date. Click the date on the calendar that appears. Unifier displays all the projects with a date value that matches the date you specified on the calendar.

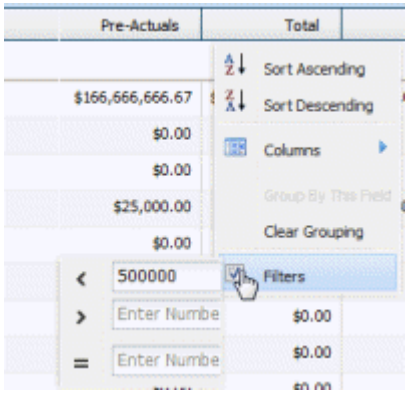


To filter information using a numeric column:

Click the arrow beside the column name and choose Filters.

- Enter a number "**greater than**" a specific number to display all the projects with numbers in that column greater than the number you specified.
- Enter a number "**less than**" a specific number to display all the projects with numbers in that column less than the number you specified.

- Enter a number "**equal to**" a specific number to display all the projects with numbers in that column that match the number you specified.



To return the sheet to an unfiltered state:

To return the sheet to an unfiltered state, click the arrow beside the column name and deselect the Filters check box.

Grouping Data on Portfolio Scenario Sheet

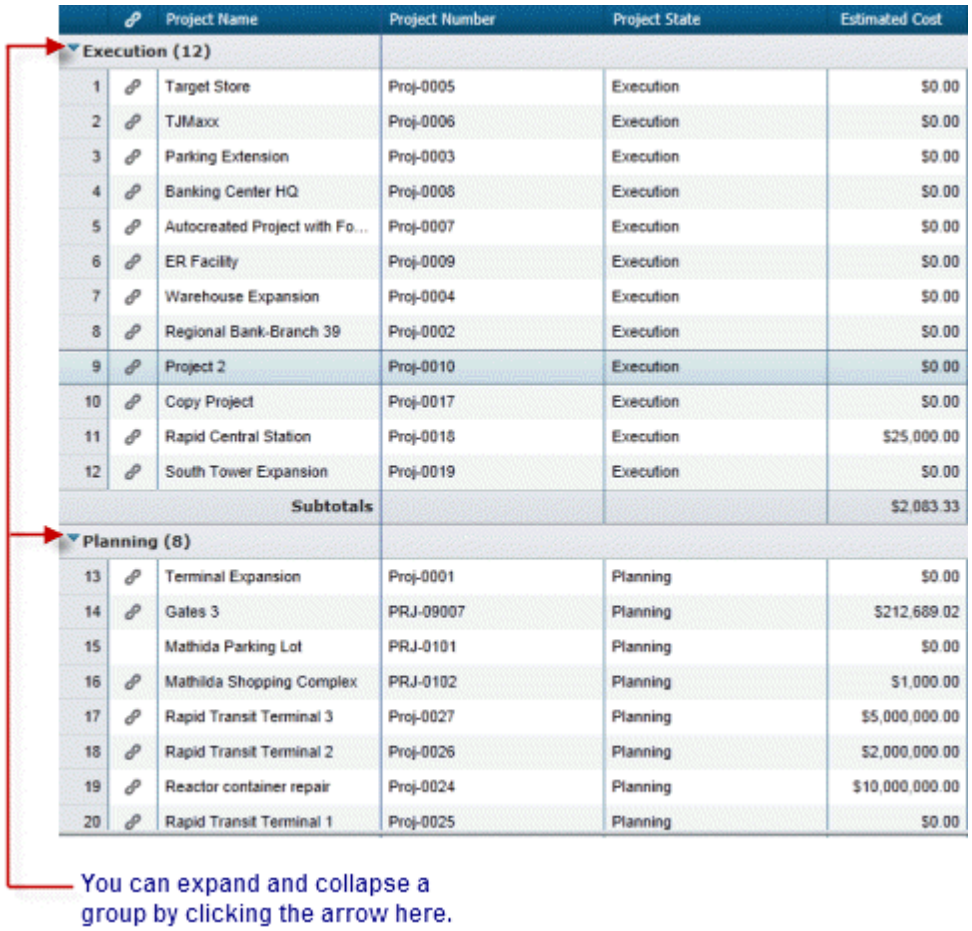
You can group the data on the portfolio scenario sheet by column. Grouping data can make it easier to identify projects with similar characteristics, such as estimated cost or start date. You can group by any column except the Pre-Actuals and year columns. See the ***Columns*** (on page 112) section for additional information.

When you group data, Unifier displays a sub-total amount by group.

To group the data:

1) Identify the column by which you want to group the data and click the down arrow beside the heading.
2) Select **Group By This Field**.

Unifier groups the data by the column value. Groupings are separated and identified by the column value you grouped on, such as **Project State** "In Execution" and "Planning."



		Project Name	Project Number	Project State	Estimated Cost
Execution (12)					
1		Target Store	Proj-0005	Execution	$0.00
2		TJMaxx	Proj-0006	Execution	$0.00
3		Parking Extension	Proj-0003	Execution	$0.00
4		Banking Center HQ	Proj-0008	Execution	$0.00
5		Autocreated Project with Fo...	Proj-0007	Execution	$0.00
6		ER Facility	Proj-0009	Execution	$0.00
7		Warehouse Expansion	Proj-0004	Execution	$0.00
8		Regional Bank-Branch 39	Proj-0002	Execution	$0.00
9		Project 2	Proj-0010	Execution	$0.00
10		Copy Project	Proj-0017	Execution	$0.00
11		Rapid Central Station	Proj-0018	Execution	$25,000.00
12		South Tower Expansion	Proj-0019	Execution	$0.00
		Subtotals			$2,083.33
Planning (8)					
13		Terminal Expansion	Proj-0001	Planning	$0.00
14		Gates 3	PRJ-09007	Planning	$212,689.02
15		Mathida Parking Lot	PRJ-0101	Planning	$0.00
16		Mathilda Shopping Complex	PRJ-0102	Planning	$1,000.00
17		Rapid Transit Terminal 3	Proj-0027	Planning	$5,000,000.00
18		Rapid Transit Terminal 2	Proj-0026	Planning	$2,000,000.00
19		Reactor container repair	Proj-0024	Planning	$10,000,000.00
20		Rapid Transit Terminal 1	Proj-0025	Planning	$0.00

Once you have grouped the data, you can further refine the view by sorting and filtering the data within each group.

3) If you want to maintain the data in this grouping, click the **Save** icon. Whenever you open the sheet, it will display the data in this grouping.

To clear grouping of data:

1) Click the down arrow beside the column heading.
2) Select **Clear Grouping**.

Sorting Data on Portfolio Scenario Sheet

To make data easier to locate alphanumerically on either the portfolio scenario sheet, or the project candidate list, you can sort the information by column in ascending or descending order.

To sort the sheet by column, click the arrow beside the column heading and choose **Sort Ascending** or **Sort Descending**.

You can also sort the data by multiple columns.

To do so, hold down the **Ctrl** key on the keyboard and click the arrows beside the column headings you want to sort by.

Creating a New Portfolio Scenario Sheet

When you (the portfolio planner) create a portfolio scenario sheet, Unifier automatically creates one initial portfolio scenario sheet; however, you can create additional scenario sheets.

To create a new scenario sheet:

1) To add a new scenario sheet, click the plus sign at the bottom of the scenario sheet window.

   Unifier adds a "new scenario" tab to the bottom of the window.

2) Enter a name for the new scenario and press the **Enter** key on your keyboard.

   You can include up to 30 characters in the name. Letters, numbers, hyphens, spaces, underscores, and special characters are allowed.

3) Click **Save All**.

   The project records that will be included on the scenario sheet are extracted from the database using a query that is part of your Portfolio Manager configuration.

   Whenever you create or open a portfolio scenario sheet, Unifier re-runs the query and adds or removes projects from the portfolio scenario sheet depending on whether the project matches the query criteria, or not.

   For example, a project that was previously on the portfolio scenario sheet may be dropped from the sheet if it no longer meets the query criteria. Another project may be added to the portfolio scenario sheet because it now meets the query criteria.

See the following sections for more information:

- ***Portfolio Manager: Portfolio Scenario Sheet*** (on page 108)
- ***Scenario Tab*** (on page 114)

Editing the Name of a Portfolio Scenario Sheet

To edit the name of a portfolio scenario sheet:

1) At the bottom of the portfolio scenario sheet window, click on the tab showing the name you want to edit. The tab name becomes editable.
2) Change the name as necessary. You can include up to 30 characters in the name. Letters, numbers, hyphens, spaces, underscores, and special characters are allowed.

See the following sections for more information:

- ***Portfolio Manager: Portfolio Scenario Sheet*** (on page 108)
- ***Scenario Tab*** (on page 114)

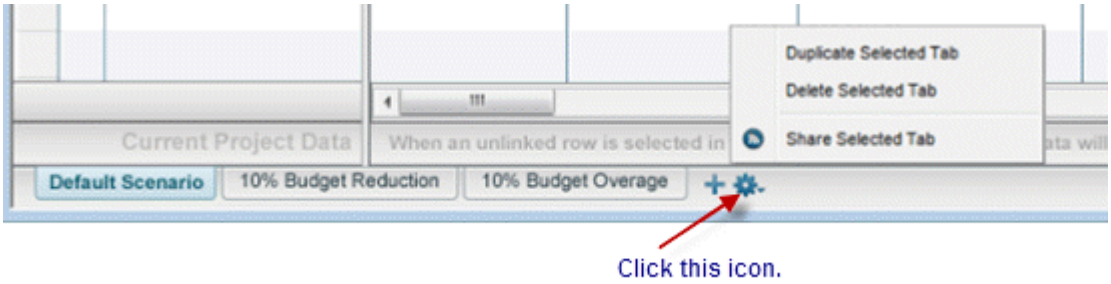
Duplicating a Portfolio Scenario Sheet

To duplicate a portfolio scenario use the manage scenario (star) icon.

1) At the bottom of the portfolio scenario sheet window, select the tab containing the scenario you want to copy.
2) Click the manage scenarios icon and choose **Duplicate Selected Tab**.

   Unifier copies the scenario into a new tab, which you can rename. All the projects in the original scenario will be copied to the new scenario, including their linked or unlinked state, and current column widths, targets, sorting, etc.

   For the new scenario, Unifier will calculate the new totals and then calculate the variance to show the difference.



3) When finished, click **Save**.

See the following sections for more information:

- ***Portfolio Manager: Portfolio Scenario Sheet*** (on page 108)
- ***Scenario Tab*** (on page 114)

Sharing a Portfolio Scenario Sheet

Sharing a portfolio scenario sheet allows the budget numbers that you (the portfolio planner) propose to become available to the project managers for review.

Since the project managers do not see the portfolio scenario sheet, or the changes that you have made, the project managers must use a read-only portfolio budget curve in the Cash Flow node of the Cost Manager to view both their original budget curve and a parallel scenario curve that shows the differences between their initial forecast projections and your proposed numbers.

In order for the project managers to see the portfolio budget curve, you must share the scenario.

For information about the portfolio budget curve, refer to the *Unifier User Guide*.

See the following sections for additional information:

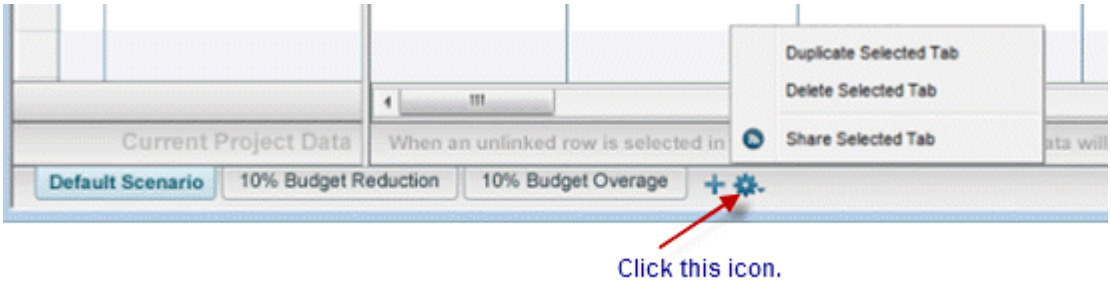
- ***Cash Flow and Capital Planning*** (on page 106)
- ***Portfolio Manager: Cash Flow Budget Curves*** (on page 109)
- ***Changing Cash Flow Amounts*** (on page 120)

Notes:

- The portfolio planner must have "full access" permission to share a scenario.
- The portfolio planner can share only one scenario at a time.

To share a portfolio scenario use the manage scenario (star) icon.

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to share.
2) Click the manage scenarios icon and choose **Share Selected Tab**.



3) Click **Save All**.

   Unifier visually marks the scenario tab with a "shared" icon and makes the scenario numbers visible on the portfolio budget cash flow curve for the project manager to see.

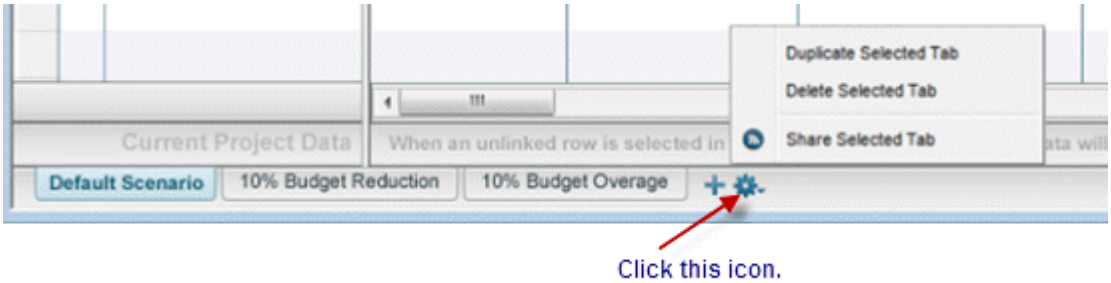
To stop sharing a scenario:

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to stop sharing.
2) Click the manage scenarios icon and choose **Stop Sharing Selected Tab**.
3) Click **Save All**.

Deleting a Portfolio Scenario Sheet

To delete a portfolio scenario use the manage scenario (star) icon.

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to delete.
2) Click the manage scenarios icon and choose **Delete Selected Tab**.



3) Click **Save All**.

Approving and Rejecting a Portfolio Scenario Sheet

After the project managers and portfolio planner agree on a portfolio scenario sheet, the portfolio planner can proceed to mark the scenario as "approved."

> **Note**: The portfolio planner must have "full access" permission to approve a scenario.

Once the portfolio planner approves a portfolio scenario sheet, Unifier:

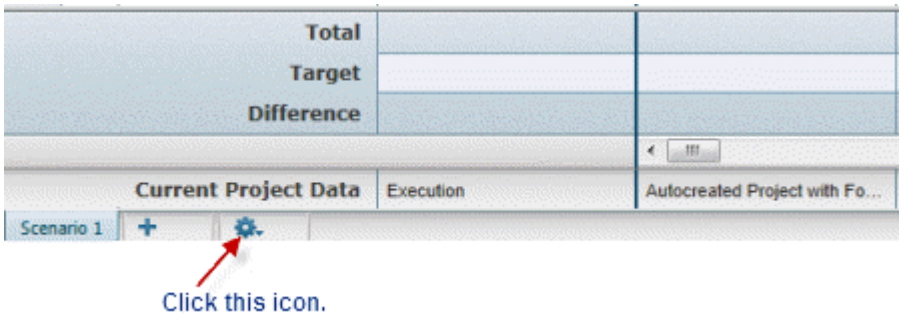
- Marks the approved scenario "shared" so that project managers can see the approved dates and numbers. The scenario is set to read-only mode and can no longer be modified or deleted.

  - **Note**: At this stage, the scenario tab shows both the shared and approved icons, next to the scenario name.

- Updates the original budget numbers of each project with the proposed numbers on the approved scenario.
- Updates the monthly or yearly cash flow number of each project with the proposed numbers on the approved scenario.
- Updates the project start date (if it was changed) for any planned projects that begins during the portfolio planning period.
- Updates the project/shell data with any project/shell information that was changed on the scenario sheet, and sends you an email notification of the updates
- Locks the budget and cash flow numbers to prevent any further changes.

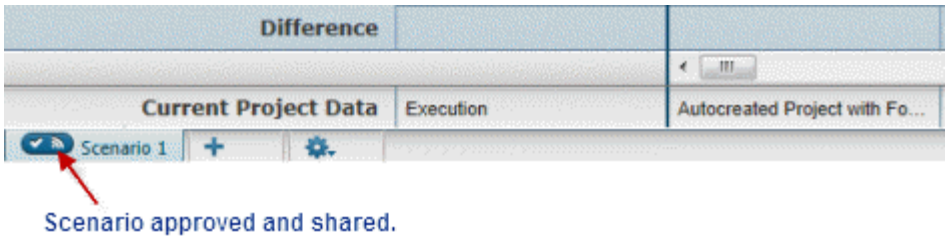
To approve a portfolio scenario use the manage scenario (star) icon.

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to approve.
2) Click the **Manage Scenarios** icon and choose **Approve Selected Tab**.



3) Click **Save All**.

When you approve a scenario, Unifier automatically shares the scenario and visually marks the scenario tab with an **Approved and Shared** icon to indicate to project managers that this is the approved scenario.



A portfolio planner can reject an approved portfolio scenario sheet if:

- Major changes occur in the business environment that impact priorities and require diversion of budget.
- There is a need to alter an existing or approved plan.

To reject a portfolio scenario sheet:

1) At the bottom of the scenario sheet window, select the tab containing the scenario you want to un-approve.
2) Click the manage scenarios icon and choose **Un-Approve Selected Tab**.

   The portfolio planner deletes the approval icon from the tab, but does not delete the shared icon.

   If the portfolio planner decides to stop sharing the scenario as well, the portfolio planner must click the manage scenarios icon and choose **Unshare Selected Tab**.
3) Click **Save All**.

> **Note**: If the portfolio planner rejects a portfolio scenario sheet, Unifier does not reset dates to their original values and the date fields retain the approved values.

Exporting a Portfolio Scenario Sheet

To use a portfolio scenario sheet data for additional purposes, you (the portfolio planner) can export your scenario sheets to Excel.

To export a portfolio scenario sheet:

Click **Export,** at the top of the Portfolio Planner window, to begin exporting the portfolio scenario sheet to Excel.

Follow the prompts and open, or save, the Excel sheet.

When you open the Excel sheet, the application displays the data from each scenario sheet, arrayed in tabs and columns identical to the Portfolio Manager scenarios.

The Excel sheet includes any formulas that were created in the Portfolio Manager for calculating values.

The Excel sheet also retains the frozen columns and the scrolling ability (so that you can scroll through the cash flow columns).

Information

Areas Business Process

Purpose

You can create an Areas record to capture project location information. The records you create using this BP, appear as data-picker options in other business processes.

Characteristics

This is a project-level, non workflow business process with no line items.

Groups associated with this business process

Members of the Project Coordinators group can create and edit this business process.

Record Statuses

Active and Inactive

In This Section

Creating an Areas Record 131
Viewing or Editing the Status of an Area Record 131

Creating an Areas Record

To create an Areas record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Information** node.
3) Click on **Areas**.
4) From the BP log page, click **Create**.On the **Create New Areas** form, enter a title for this area.
5) From the **Status** pull-down menu, select the status of this area.
6) Click **Save** to save your changes.
7) Click **Finish Editing** when you are ready to create the new area record.

> **Note:** You must enter a value in all required fields (*) before you can save the form. If a field is grayed out, no action is required.

Viewing or Editing the Status of an Area Record

After an Area record has been created, you can view or edit the status of the Area record.

To view or edit the status of an Area record:

1) Go to your project and ensure that you are in User mode.
2) Expand the **Information** node.
3) Click **Areas**.
4) Open the Area record you want to view or edit.
5) Click **Edit** and make your changes.
6) Click **Finish Editing** when you are done updating the record.

Specification Sections Business Process

Purpose

You can create a Specification Sections record to capture the specification sections that are documented in a contract. The records you create using this BP, appear as data-picker options in other business processes.

Characteristics

This is a project-level, non workflow business process with no line items.

Groups associated with this business process

Members of the Project Coordinators group can create and edit this business process.

Record Statuses

Active and Inactive

In This Section

Creating a New Specification Sections Record..... 133
Viewing or Editing the Specification Sections Record..... 133

Creating a New Specification Sections Record

To create a new Specification Sections record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Information** node and click on **Specification Sections**.
   From the BP log page, click **Create**.The Create New Specification Sections form.
3) Enter a title.
4) From the **Status** pull-down menu, select a status for this specification section.
5) Click **Save** to save your changes.
6) Click **Finish Editing** when you are ready to create a new area record.

> **Note:** You must enter a value in all required fields (*) before you can save the form. If a field is grayed out, no action is required.

Viewing or Editing the Specification Sections Record

After a Specification Sections record has been created, you can view or edit the status of the record.

To view or edit a Specification Sections record:

1) Go to your project and ensure that you are in User mode.
2) Expand the **Information** node.
3) Click **Specification Sections**.
4) Open the Specification Sections record you want to view or edit.
5) Click **Edit** and make your changes.
6) Click **Finish Editing** when you are done updating the record.

Document Manager

Document Manager maintains all the files and documents for a project. Each project includes its own Document Manager, and another Document Manager resides at the company level.

The Document Manager ensures that employees and project members are always using the most current versions of documents and makes accessing and distributing documents efficient.

Documents are organized into a "folder" structure to categorize them and make them easily available, much like a filing cabinet.

The Document Manager is integrated with business processes. You can initiate a business process directly from the Document Manager and automatically attach files and folders to it.

For detailed information about Document Manager and working with documents, refer to the *Unifier Managers User Guide*.

Changes made to a business process (BP) attachments (in forms or line items) will be automatically published to pre-defined folders in Unifier Document Manager.

Attachments in company-level BP will be published to specified folders in Company Documents and those in project-level BP will be published to folders in a project's Documents log.

Files that are attached to a BP form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking **Submit** in non-workflow BP.

The administrator must then publish the files in the Unpublished Documents folder in Document Manager to the Documents folder.

By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment, and collaborate.

Using Document Manager

In Unifier, the **Documents** node in the navigator is where all documents—such as drawings, spreadsheets, image files, Microsoft Office files—are stored and managed.

Under this node, at the project level, we have provided an extensive **Project Documents** node containing a folder structure to support an array of document types, such as Project Budgets and Schedules, Bids and Contracts, and Permits and Fees.

You can upload, download, revise, or mark up all documents from this node. The Documents node has check-in/check-out, document lock, and revision history features for version control.

The **Unpublished Documents** node is the temporary, automatic repository for files that have been uploaded from local machines and attached to business processes, but which have not yet been "published" to the Documents node.

When you upload a file from a local machine and attach it to a business process, the document is automatically stored in the Unpublished Documents node with a link to the business process to which it belongs.

The link to the business process allows the administrator to review where the document originated from. This way, the administrator can control the documents that are accessible in the Document Manager.

For example, a subcontractor might submit a Request for Information (RFI) with attached documents requesting input from the architect. The attached documents can be traced to the original business process through the link, and the documents will become available in the unpublished node.

The administrator can then review the documents, decide where to store them, and publish them to the **Documents** node; or the administrator can decide not to publish them at all.

To view the published file attachments of a *project-level BP record*:

1) In a project's Navigator, click **Document Manager** and select **Documents**.
2) In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a *company-level BP record*:

1) In the Company Workspace Navigator, click **Document Manager** and select **Company Documents**.
2) In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

Refer to the *Unifier User Guide* for details about the following topics:

- Working with documents (accessing, opening, copying, moving, and deleting)
- Uploading files (using various methods)
- Downloading documents and files
- Adding and viewing graphic markups
- Revising documents

Launching a BP Record from Document Manager

A BP record can be launched directly from documents within the Document Manager. This function applies to any business processes (BPs) that support attachments directly to the form. This is not applicable to file attachments to comments.

For document-type BPs, the documents can to be added as line items, or they can be attachments to the form. For non-document-type BPs, the documents are added directly as form attachments.

Notes:

- Text-type BPs such as Action Items cannot be launched directly from the Document Manager. This is because text-type BPs, by design, can have file attachments only to the comments section, not the form itself.
- Only document-type BP can support folders. If you are trying to attach one or more folders to a non-document-type record, the files within the folders will be attached, but the folder structures will be flattened.
- You cannot attach multiple files with the same name to the same folder. If you select multiple files and there are two or more with the same name, none of those files will be attached. After the form is created, you can attach the correct files using the **Add Attachment** button.
- The business process list that you see in the drop-down menu is the list of all available active BPs in the project. Once you select a business process, a permission check will be run. You must have at least create permission on that business process to launch it from the Document Manager.

To launch a business process from the Document Manager:

1) Select one or more files or folders in the Documents log.

   You can also launch a business process record without selecting any documents or folders. In this case, the business process record will be created with an empty attachment area.
2) Click **New > Business Process** and choose the business process to launch. The Select Workflow window opens.

   Note: Unifier will not display the Select Workflow window if:
   - This is a non-workflow process.
   - There is only one workflow schema you can choose for this business process.
3) Choose the workflow schema to use and click **OK**.
4) You can add additional documents to the record as you normally would.
5) Complete the BP form and send. The attached documents are linked to the business process record.

Viewing Documents Linked to BP Records

If a document has been attached to one or more business process records, an icon will appear in the Business Process column next to the document in the log. You can view the records to which the document is attached.

To view business process records to which a document is linked:

1) In the Documents log, select a document. Documents with the paper-clip icon in the Business Process column are linked to business process records.

2) Click the **View** menu and select **Linked BP Records**. The View Linked Records window opens.
3) To open the record, select it form the list and click the **Open** button or double-click the record.

Financial Transactions

Estimates Business Process

Purpose

You can have different types of estimates that are generated at different points in the project. You may have an initial estimate, and as you go through design, you will get more detailed estimates. Consider the following paragraph:

The required levels of accuracy of construction cost estimates vary at different stages of project development, ranging from ball park figures in the early stage to fairly reliable figures for budget control prior to construction. Since design decisions made at the beginning stage of a project life cycle are more tentative than those made at a later stage, the cost estimates made at the earlier stage are expected to be less accurate. Generally, the accuracy of a cost estimate will reflect the information available at the time of estimation.

Business process characteristics

Estimates is a non-workflow, project-level, cost-type business process with line items. You can create more than one Estimates record for your projects. An individual help file is available for this business process.

Groups associated with this business process

Project Coordinators can create and edit this business process.

Statuses

Active and Inactive

Additional Information

- Closed estimates will roll up to the cost sheet.
- Enabled for mobile and hand-held devices.
- Project Name and Project Number are auto-populated from the shell attribute form.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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Creating an Estimates Record

To create a new Estimates record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions**.
3) Select **Estimates**.
4) From the BP log page, click **Create**.In the Create New Estimates form:
   a. Complete, at minimum, the required fields according to the Upper form table below. You can save the form as a draft at any time. Unifier stores the draft in the **Drafts** folder.
   b. In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
   c. Complete the Line Items form according to the Line Items table below. You must complete all required fields on each line that you entered before you can save the Line Items form.
   d. Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.
   e. If you are using the grid and do not click Save before closing it, you will lose your line item changes.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates the first time you save the form.
Title	This is a required field - Enter a name for the record.
Project Number	This is a read-only field that is auto-populated from the project's shell.

In this field	Do this
Project Name	This is a read-only field that is auto-populated from the project's shell.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you initially saved the form and it became a record.
Record Last Update Date	This is a read-only field that Unifier populates when you save a record.
Status	This is a read-only field that changes depending upon the records editable state.
Contract Reference	Select the contract from those listed in the Contracts log.
Potential Changes Reference	Select a Potential Changes record to associate with this estimate.
Estimate Type	Select a value from the Estimate Type drop-down menu.
Amount	This is an auto-calculated field that shows the total amount of the line items.

Description

In this field	Do this
Description	Enter a description for the record

P6 Activity Details

In this field	Do this
P6 Activity	Select the P6 activity you want associated with this estimate.
P6 Planned Start	This value comes from the P6 activity.
P6 Planned Cost	This value comes from the P6 activity.
P6 Planned Finish	This value comes from the P6 activity.

Adding Line Items to the Estimates Record

To add line items to the Estimates record.

The record must be in Edit mode to add line items.

1) In the **Line Items** section click **Add** or **Grid**. The Line Item form opens.

2) Complete the Line Item form according to the Line Item table below. You must complete all required fields on each line that you entered before you can save the Line Item.
3) Click **Save** to save the form.

Line Item Table

In this field Use	Do this
Tab Name	You can enter a name for the tab.
Cost Code*	This is a required field -Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This read-only field is auto-populated from the cost code.
Cost Type	This read-only field is auto-populated from the cost code.
Spend Category	Select the category from the drop-down menu.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Work Package	You can select a Work Package.
Description	This is not a required field - Enter a description for the line item.
Item Quantity*	This is a required field - Enter the number of items specified on the line item.
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item.
Item Unit Cost*	This is a required field - Enter the price of the item specified on the line item.
Amount	This read-only field is auto-calculated using the formula Item Quantity X Item Unit Cost.

Saving the Estimates Record

- ***To save the Estimates record***

Click either:

- **Finish Editing** to save the form in read-only mode
  - You can return the record to Edit mode by clicking **Edit** on the business process tool bar.
- **Save** to leave the form in edit mode

Fund Appropriations Business Process (Owner Project Only)

Purpose

Use this business process to approve and assign Fund accounts to projects.

Business process characteristics

- This is a project-level, Cost-type business process subtype line items with fund code, classification generic, for use with general spends or payment application. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status
- Rejected, a terminal status
- Canceled, a terminal status

Groups associated with this business process

- Project Coordinators can create the Fund Appropriations business process and send it for approval.
- Project Managers can approve, reject, or send it back for revision.
- Members of the All Project Users group can be copied on this business process.

Additional Information

- You must have a Funding Sheet defined for your project before you can use the Fund Appropriations business process.

  Note: The funding sheet comes pre-defined in the project template.
- Fund Appropriations is enabled for mobile phones and hand-held devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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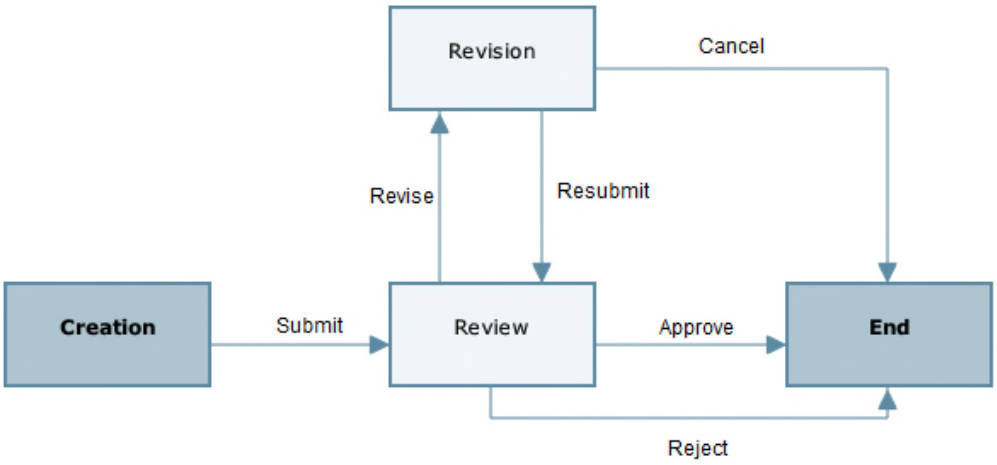
Fund Appropriations Workflow

Below are the four steps of the Fund Appropriations workflow.



Creating a Fund Appropriations Records

- ***To create a Fund Appropriations record***

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Funding** node.
3) Select **Fund Appropriations**.
4) From the BP log page, click **Create**.In the Create New Fund Appropriations form, complete, at minimum, the required fields according to the Upper form table below. You can save the form as a draft at any time. Unifier stores the draft in the **Drafts** folder.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.

6) Complete the Line Items form according to the Line Items table below. You must complete all required fields before you can save the Line Items form.
7) Click **Save** (if using the grid) or **OK** (if using the Line Item form) to save the form. The Line Items form closes.
   - If you close the grid before you save it, you will lose your entries.
   - Unifier automatically calculates the aggregate value of the line items and displays the sum in the **Amount** field in the Upper form, and in the **Total Amount** field in Line Items.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This action activates **Action Details**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the **Review** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications** log.
10) Click **Send** to route the record to the **Review** step. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

In this field	Do this
Record Number	This is a read-only field that Unifier populates.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Creator	This is a read-only field that identifies the person who created the record. The field appears as a link to the record creator's contact information.
Creation Date	This is a read-only field that Unifier populates with the record creation date.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This is a read-only field.
Amount	This value is auto-populated from the aggregate value of line items.

In this field	Do this
Description	This is not a required field - Enter a description of the budget change.
Current Project Budget	This is a read-only field.
Previous Funding Amount	This is a read-only field.
Amount	This is a read-only field.
Total Funding	This is a read-only field.

Item Logs

Line Items Tab

In this field	Do this
Funding Source*	This is a required field - Use the Fund Picker to select a funding source.
Fund Name	Enter the name of the fund.
Fund Description	Enter a description for the fund.
Short Description*	This is a required field - Enter a brief description for the line item.
Amount	Enter a value for the Amount.

Routing a Fund Appropriations Record from the Review Step

To route a Fund Appropriations Record from the Review step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Review the Budget Approvals record and determine the appropriate course of action. You cannot make changes to the record on the Approval step.

5) In the toolbar, click the **Workflow Actions** drop-down menu to select from one of the following options:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.
   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's Home page under **Notifications**.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send** to route the record to the next step, either **Revision** or **End**.

Routing a Fund Appropriations Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log. When your task is complete, you can select the appropriate workflow action.

To route a Fund Appropriations record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

     The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You can revise the following: Title, Contract Reference, Description, Line Items.
4) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form.
5) Click **OK** to save the Line Items.

6) When ready, select a workflow action. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.
   - **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.
   - This action activates **Action Details**.
7) In **Action Details**, select who should receive the task and who should receive a copy of the record.
8) When ready, click **Send**.

To view a Fund Appropriations record on the End step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a Fund Appropriations record on the End step

1) Go to your project and ensure that you are in User mode.
2) Click to expand the **Financial Transactions** node.
3) Expand the **Funding** node.
4) Click **Fund Appropriations**.
5) Open the record. In the business process you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.

Budget (Owner Project)

Initial Budget Business Process

Purpose

Use this business process to approve and assign budget to a project; project data is broken down by cost codes. You must assign budget to a cost code before you can write a contract against that cost code.

Business process characteristics

This is a project-level, cost-type business process with line items and workflow. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status.
- Canceled, a terminal status.
- Rejected, a terminal status

Groups associated with this business process

- Project Coordinators can create the Initial Budget business process and send it for approval.
- Project managers can approve the business process 'as is,' send it to the Revision step for clarification, evaluate the revision upon resubmission from the creator, and either approve or reject the budget
- Members of the All Project Users group can be copied on this business process during the Approval and the Revision steps.

Additional Information

- Step completion policy and resolving actions can differ between steps.
- Enabled for mobile devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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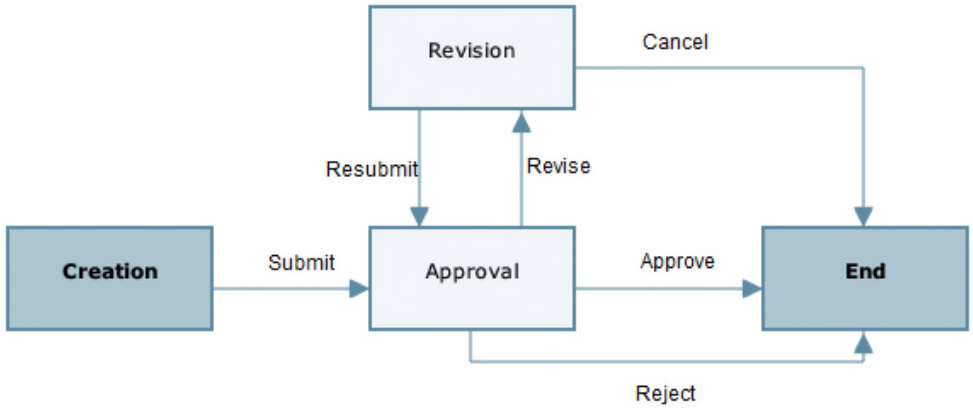
Initial Budget Workflow

Below are the four steps of the Initial Budget workflow.



Creating an Initial Budget Record

To create an Initial Budget record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Budget** node.
3) Select **Initial Budget**.
4) From the BP log page, click **Create**. The Create New Budget Approvals form opens. Complete, at minimum, the required fields according to the Upper form table below. You can save the form as a draft at any time. Unifier stores the draft in the **Drafts** folder.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
6) Complete the Line Items form according to the Line Items table below. You must complete all required fields on each line that you entered before you can save the Line Items form.

7) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.

   Unifier automatically calculates the aggregate value of the line items and displays the amount in the Budget Information block, **Amount** field and in the Line Items section **Total Amount** field.

8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This action activates **Action Details**.

9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.

10) Click **Send** to route the record to the **Approval** step. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Creator	This is a read-only field that identifies the person who created the record. The field appears as a link to the record creator's contact information.
Creation Date	This is a read-only field that Unifier populates with the record creation date.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank. The status will change when the task is accepted on the next step in the workflow.
Contract Reference	This is not a required field - Enter a contract reference.

In this field	Do this
Transaction Currency	From the drop-down menu, select a currency.
Amount	This value is auto-populated from the aggregate value of line items.
Description	This is not a required field - Enter a description of the budget change.
P6 Activity	Select a P6 activity associated with this record.
P6 Planned Cost	This is a read-only field it is based on the P6 activity you selected.
P6 Planned Start	This is a read-only field it is based on the P6 activity you selected.
P6 Planned Finish	This is a read-only field it is based on the P6 activity you selected.

Item Logs

Line Items Tab

In this field	Do this
Cost Code*	This is a required field -Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This read-only field is auto-populated from the cost code name.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Description	This is not a required field - Enter a description for the line item.
Spend Category	Select the category from the drop-down menu.
Work Package	You can select a Work Package.
Item Quantity*	This is a required field - Enter the number of items specified on the line item
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field - Enter the price of the item specified on the line item
Amount	This read-only field is auto-calculated using the formula Item Quantity X Item Unit Cost.
P6 Activity	Select a P6 activity associated with this item.

In this field	Do this
P6 Planned Cost	This read-only field is based on the selected P6 activity.
P6 Planned Start	This read-only field is based on the selected P6 activity.
P6 Planned Finish	This read-only field is based on the selected P6 activity.

Routing an Initial Budget Record from the Approval Step

To route an Initial Budget record from the Approval step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
     - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes.
     - You cannot make changes to the Action form when you are on the Approval step.
     - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
     - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the record and determine the appropriate course of action.
5) From the toolbar, click the **Workflow Actions** drop-down menu. The choices are:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
     - To add General Comments click the link at the bottom center of the form. These comments are permanent.
     - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.

d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.

8) Click **Send** to route the record to the next step, either **Revision** or **End**.

Routing an Initial Budget Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log. When your task is complete, you can select the appropriate workflow action.

To route an Initial Budget record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

     The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You can revise the following: Title, Contract Reference, Description, Line Items.
4) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form.
5) Click **OK** to save the Line Items.
6) When ready, select a workflow action. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.
   - **Approve** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
8) When ready, click **Send**.

Viewing an Initial Budget Record on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view an Initial Budget record on the End step

1) Go to your project and ensure that you are in User mode.
2) Click to expand the **Financial Transactions** node.
3) Expand the **Budget** node.
4) Click **Initial Budget**. The Initial Budget log opens.
5) Open the record. In the business process you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.

Budget Changes Business Process

Purpose

Use this business process to request a budget increase or reduction after establishing the original budget.

Business process characteristics

This is a project-level, Cost-type business process with line items and workflow. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status
- Canceled, a terminal status
- Rejected, a terminal status

Groups associated with this business process

- Project Coordinators can create the Budget Changes business process and send it for approval.
- Project Managers can approve the business process 'as is,' send it to the Revision step for clarification, evaluate the revision upon resubmission from the creator, and either approve or reject the budget.
- Members of the All Project Users group can be copied on this business process during the Approval and the Revision steps.

Additional Information

- Enabled for mobile devices.
- Step completion policy and resolving actions can differ between steps.
- Allows association of a budget change with a specific contract.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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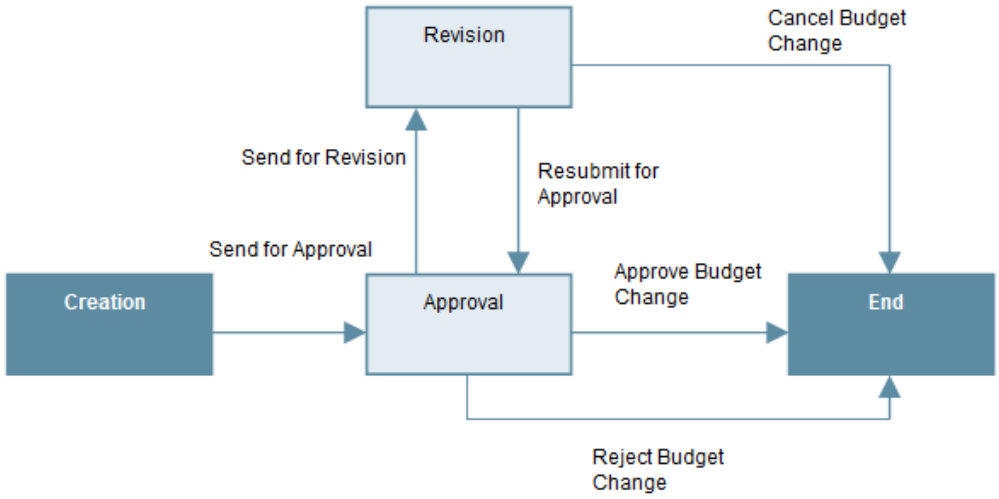
Budget Changes Workflow

Below are the four steps of the Budget Changes workflow.



Creating a Budget Changes Record

To create a Budget Changes record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Budget** node.
3) Select **Budget Changes**.
4) From the BP log page, click **Create**.The **Create New Budget Changes** form opens. Complete, at minimum, the required fields according to the Upper form table below. You can save the form as a draft at any time. Unifier stores the draft in the **Drafts** folder.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.

6) Complete the Line Items form according to the Line Items table below. You must complete all required fields on each line that you entered before you can save the Line Items form.
7) Click **OK** to save the Line Items.

   Unifier automatically calculates the aggregate value of the line items and displays the amount in **Total Amount** at the bottom of the record.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page **Notifications** log.
10) Click **Send** to route the record to the **Approval** step. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

General Block

In this field	Do this
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Creator	This is a read-only field that identifies the person who created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates with the record creation date.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record title in bold red.
Status	This read-only field is blank. The status will change when the task is accepted on the next step in the workflow.
Contract Reference	This is not a required field - Enter a contract reference.

Budget Information

In this field	Do this
Type of Change	Select the type of change (Increase or Decrease).
A. Original Budget	This value comes from the project cost sheet.
B. Prior Changes	This value comes from the project cost sheet.
C. Pending Changes	This value comes from the project cost sheet.
D. Current Request	This value is auto-populated. It is a sum of all lines in the Detail form.
E. Total Budget (A+ B+C+D)	This read-only field is auto-calculated based on the formula (A. Original Budget + B. Prior Changes + C. Pending Changes + D. Current Request)

Description

In this field	Do this
Description	This is not a required field - Enter a description of the budget change.

P6 Activity Details

In this field	Do this
P6 Activity	Select the P6 activity you want associated with this budget change.
P6 Planned Start	This value comes from the P6 activity.
P6 Planned Cost	This value comes from the P6 activity.
P6 Planned Finish	This value comes from the P6 activity.

Item Logs

Line Items Tab

In this field	Do this
Cost Code*	This is a required field -Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This read-only field is auto-populated from the cost code name.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Description	This is not a required field - Enter a description for the line item.

In this field	Do this
Spend Category	Select the category from the drop-down menu.
Work Package	You can select a Work Package.
Item Quantity*	This is a required field - Enter the number of items specified on the line item
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field - Enter the price of the item specified on the line item
Amount	This read-only field is auto-calculated using the formula Item Quantity X Item Unit Cost.

Routing a Budget Changes Record from the Approval Step

To route a Budget Changes record from the Approval step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
     - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
     - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
     - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the record and determine the appropriate course of action. You cannot make changes to the record on the Approval step.
5) From the toolbar, click the **Workflow Actions** drop-down menu. The choices are:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
     - To add General Comments click the link at the bottom center of the form. These comments are permanent.

- To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.

7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
8) Click **Send** to route the record to the next step.

Routing a Budget Changes Record from the Revision Step

Upon sending the business process record forward to the **Revision** step, Unifier sends a task to the assignee. You can see your active tasks in your **Tasks** log. When your task is complete, select the appropriate workflow action.

To route a Budget Changes record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

     The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You can revise the following: Title, Contract Reference, Type of Change, Description.
4) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form.
5) Click **OK** to save the Line Items.
6) When ready, select a workflow action. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.
   - **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.

     This action activates **Action Details**.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.

d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.

8) When ready, click **Send**.

Viewing a Budget Changes Record on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a Budget Changes record on the End step

1) Go to your project and ensure that you are in User mode.
2) Click to expand the **Financial Transactions** node.
3) Expand the **Budget** node.
4) Click **Budget Changes**. The Budget Changes log opens.
5) Open the record. In the business process you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.

Budget Transfers Business Process

Purpose

Use this business process to transfer budget from one cost code to another. Most typically used to release budget contingency to other cost items.

Business process characteristics

This is a project-level, cost-type business process with line items and workflow. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status
- Rejected, a terminal status
- Canceled, a terminal status

Groups associated with this business process

- Project Coordinators can create the Budget Transfers business process and send it for approval.
- Project Managers can review and approve the business process 'as is,' send it to the Revision step for clarification, evaluate the revision upon resubmission from the creator, and either approve or reject the budget transfer.
- Members of the All Project Users group can be copied on this business process during the Review and Revision steps.

Relationships associated with this business process

The Creation form includes a Contract business process picker that allows you to associate this budget transfer with a specific contract.

Additional Information

- Enabled for mobile devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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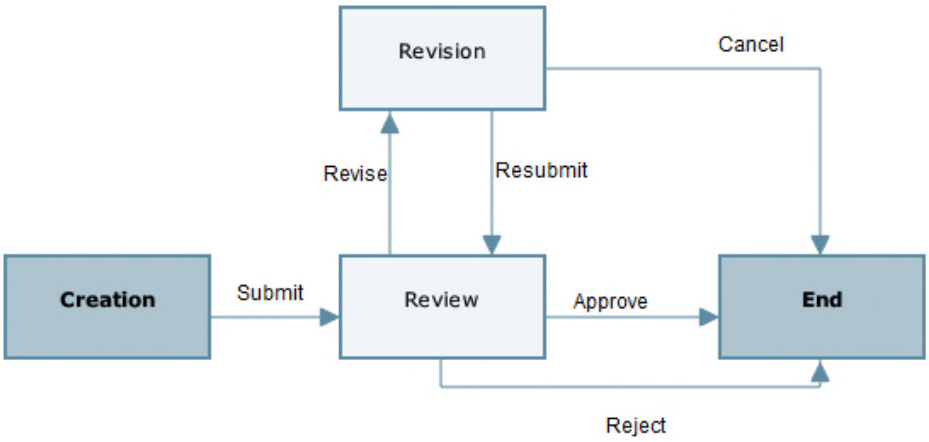
Budget Transfers Workflow

Below are the four steps of the Budget Transfers workflow.



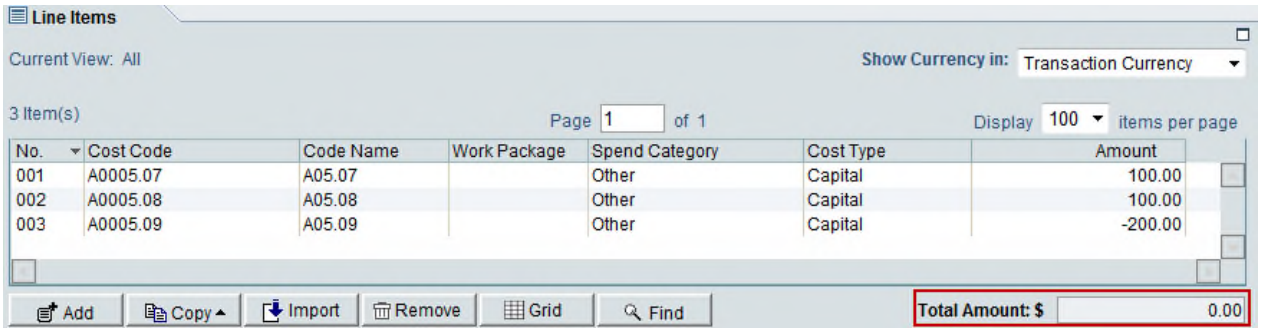
Creating a Budget Transfers Record

To create a Budget Transfers record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Budget** node.

3) Select **Budget Transfers**.
4) From the BP log page, click **Create**.The Create New Budget Transfers form opens. Complete, at minimum, the required fields according to the Upper form table below. You can save the form as a draft at any time. Unifier stores the draft in the **Drafts** folder.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens
6) Complete the Line Items form according to the Line Items table below. You must complete all required fields on each line that you entered before you can save the Line Items form.

   In this step you are transferring budget from a source cost code to at least one destination cost code, so you need at least two entries. Total Amount of Line Items must equal zero or you will not be able to send the record to the next step.



7) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click **Save** before closing it, you will lose your line item changes.

   Unifier automatically calculates the aggregate value of the line items and displays the amount in **Total Amount** at the bottom of the record.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This action activates **Action Details**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the **Review** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
10) Click **Send** to route the record to the Review step. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

General

In this field	Do this
Project Number	This field is auto-populated from the project.
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Project Name	
Title*	Enter a name for the record.
Project Name	This field is auto-populated from the project.
Amount	This value is auto-calculated from line item entries.
Creator	This is a read-only field that identifies the person who created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates with the record creation date.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank. The status will change when the task is accepted on the next step in the workflow.
Contract Reference	Select a Contract record.

Description

In this field	Do this
Description	This is not a required field - Enter a description of the budget change.

P6 Activity Details

In this field	Do this
P6 Activity	Select the P6 activity you want associated with this budget transfer.
P6 Planned Start	This value comes from the P6 activity.
P6 Planned Cost	This value comes from the P6 activity.
P6 Planned Finish	This value comes from the P6 activity.

Item Logs

Line Items Tab

In this field	Do this
Cost Code*	This is a required field - Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This read-only field is auto-populated from the cost code name.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Description	This is not a required field - Enter a description for the line item.
Cost Type	This read-only field is auto-populated from the cost code attributes.
Spend Category	Select the category from the drop-down menu.
Work Package	Select a Work Package.
Item Quantity*	This is a required field - Enter the number of items specified on the line item
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field - Enter the price of the item specified on the line item
Amount	This read-only field is auto-calculated using the formula Item Quantity X Item Unit Cost.

Routing a Budget Transfers Record from the Review Step

To route a Budget Transfers record from the Review step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.
     - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
     - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the Budget Transfers record and determine the appropriate course of action.
5) From the toolbar, click the **Workflow Actions** drop-down menu. The choices are:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's Home page under **Notifications**.

   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send.**

Routing a Budget Transfers Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a Budget Transfers record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

     The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You can revise the following: Title, Contract Reference, Type of Change, Description, and Line Items (Total Amount, additions and reductions, must equal zero).
4) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. See the Line Item Table in Creating a Budget Transfers Record
5) Click **OK** to save the Line Items.
6) When ready, select a workflow action. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.

a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
b. Select the user or group who will receive the task when the record returns to the **Approval** step.
c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
f. Click **Add**.
g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's Home page under **Notifications**.

- **Cancel** — This action sends the record to the End step in Canceled status. The To field is unavailable but you can add a Cc.
- This action activates **Action Details**.

7) In **Action Details**, select who should receive the task and who should receive a copy of the record.
8) When ready, click **Send**.

Viewing a Budget Transfers Record on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

- ***To view a Budget Transfers record on the End step***

1) Go to your project and ensure that you are in User mode.
2) Click to expand the **Financial Transactions** node.
3) Expand the **Budget** node.
4) Click **Budget Transfers**. The Budget Transfers log opens.
5) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.

Budget (Contractor Project)

Budget Items Business Process

Purpose

Use the Budget Items business process to identify and approve the budget commitments between you and your owner. You must assign a budget cost code to each line item. Upon approval, the Budget Items-SOV sheet is created and the cost sheet is updated.

Business process characteristics

This is a project-level, cost-type business process with line items and workflow. An individual help file is available for this business process.

Groups associated with this business process

- Project Coordinators can create this business process and send it for approval.
- Project Managers can approve the business process 'as is,' send it to the Revision step for clarification, evaluate the revision upon resubmission and either approve or reject the budget.
- Members of the All Project Users group can be copied on this business process during the Review and the Revision steps.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status.
- Canceled, a terminal status.
- Rejected, a terminal status

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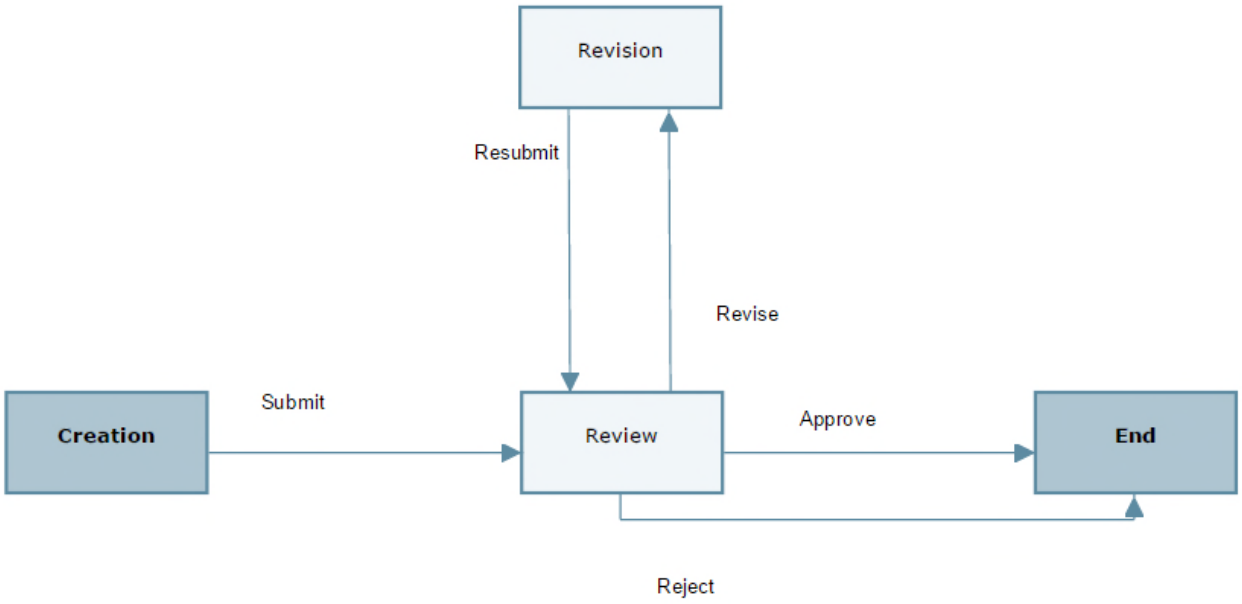
Budget Items Workflow

Below are the four steps of the Budget Items workflow.



Creating a Budget Items Record

To create a Budget Items record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Budget** node.
3) Select **Budge Items**.
4) From the BP log page, click **Create**.The Create New Budget Items form opens. Complete the form according to the Upper form table below. You must complete all required fields. You can save the form as a draft at any time. Unifier stores the draft in the **Drafts** folder.
5) In the **Line Items** section, click **Add** and select **Lump Sum** or **Unit Cost** to select the type of cost item. You can also click the **Grid** button to enter multiple line items. The Line Items form opens.
6) Complete the Line Items form according to the Line Items table below. You must complete all required fields on each line that you entered before you can save the Line Items form.
7) Click **Add Cost**.
8) Select a cost code to associate with this cost item and click the **Select** button. You can distribute the total amount across multiple cost codes. Click the **Add Remaining** button to add the remaining amount to a cost code.
9) Enter a short description for this line item.
10) Enter an amount for this line item.
11) Click **Save**. The Line Items form closes.

    If you do not click **Save** before closing the form, you will lose your line item changes.

The system automatically calculates the aggregate value of the line items and displays the amount in the Budget Information block.

12) Repeat steps 6 to 12 to add more line items.
13) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This action activates **Action Details**.
14) In **Action Details**, select who should receive the record.
    a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
    b. Select the user or group who will receive the task on the **Review** step.
    c. Click **Add**.
    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
    e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications** .
15) Click **Send** to route the record to the Reviews step. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

In this field	Do this
Record Number	This is a read-only field that Unifier populates.
Title*	This is a required field - Enter a name for the budget item record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Creator	This is a read-only field that identifies the person who created the record. The field appears as a link to the record creator's contact information.
Creation Date	This is a read-only field that Unifier populates with the record creation date.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank. The status will change when the task is accepted on the next step in the workflow.
Contract Reference	This is not a required field - Enter a contract reference.
Work Retainage %	Enter the work retainage %.
Transaction Currency	From the drop-down menu, select a currency.
Amount	This value is auto-populated from the aggregate value of line items.

In this field	Do this
Description	This is not a required field - Enter a description of the budget change.
P6 Activity	Select a P6 activity associated with this record.
P6 Planned Cost	This is a read-only field it is based on the P6 activity you selected.
P6 Planned Start	This is a read-only field it is based on the P6 activity you selected.
P6 Planned Finish	This is a read-only field it is based on the P6 activity you selected.

Line Items Tab

In this field	Do this
Cost Line Item Type	This is auto-populated based on the Line Item Type you selected.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Spend Category	Select a category from the drop-down menu.
Item Quantity*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the number of items specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Unit of Measure*	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the price of the item specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Amount	If the Cost Line Item Type is Lump Sum, then enter the total amount for this line item. This is a read-only field if the Cost Line Item Type is Unit Cost. It is auto-calculated using the formula Item Quantity Item Unit Cost.
Costed Quantity	This is a read-only field.
Not costed Amount	This is a read-only field.
Costed Amount	This is a read-only field.

In this field	Do this
Not Costed Quantity	This is a read-only field.
Description	Enter a short description of this line item.
P6 Activity	Select a P6 activity associated with this item.
P6 Planned Cost	This read-only field is based on the selected P6 activity.
P6 Planned Start	This read-only field is based on the selected P6 activity.
P6 Planned Finish	This read-only field is based on the selected P6 activity.

Routing a Budget Items Record from the Review Step

To route a Budget Items record from the Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Review step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the record and determine the appropriate course of action. You cannot make changes to the record on the Approval step.
5) From the toolbar, click the **Workflow Actions** drop-down menu. The choices are:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) In **Action Details**, select who should receive the record.

a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
b. Select the user or group who will receive the task.
c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

8) Click **Send** to route the record to the next step.

Routing a Budget Items Record from the Revision Step

To route a Budget Items record from the Revision step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form.
5) Click **OK** to save the Line Items.
6) When ready, select a workflow action. The choices are:
   - **Resubmit** — This action sends the record back to the Review step in Pending status.
   - **Cancel**— This action sends the record to the End step in Canceled status.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
8) When ready, click **Send**.

Viewing a Budget Items Record on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a Budget Items record on the End step:

1) Go to your project and ensure that you are in User mode.
2) Click to expand the **Financial Transactions** node.
3) Expand the **Budget** node.
4) Click **Budget Items**. The Budget Items log opens.
5) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.

Payment Applications to Owner Business Process

Purpose

A process for requesting project payments sent by the contractor to the owner. Each Payment Applications record:

- References a specific Budget Items record.
- Displays a ledger of that Budget Items payment and retainage information.
- Updates that Budget Items-SOV.

Business process characteristics

This is a cost-type business process that includes an approval workflow. Approved data from this business process rolls up to the project cost sheet and updates the schedule of values. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status
- Rejected, a terminal status

Groups associated with this business process

- Creation: Project Coordinators
- Review: Customer. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.

Additional Information

- Step completion policy and resolving actions can differ between steps.
- Not enabled for integration.
- Not enabled for publish path.
- Files attached to business process forms or to line items will be automatically published to Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log

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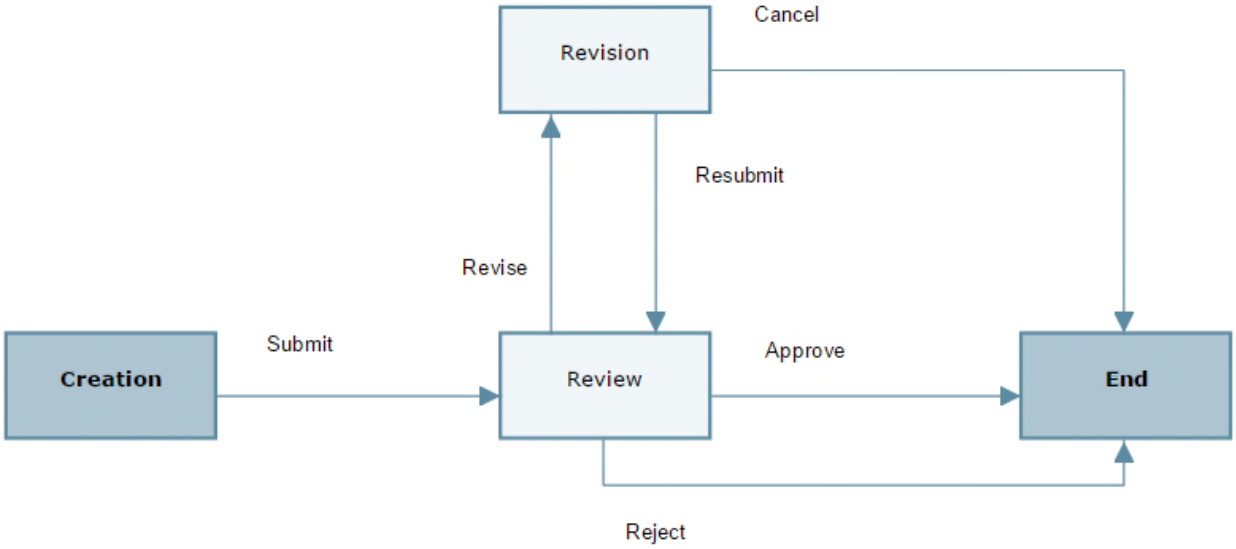
Payment Application to Owner Workflow

Below are the steps in Payment Application to Owner workflow.



Creating a Payment Application to Owner Record

The first step in the Payment Applications business process workflow is the Creation step.

To create a new Payment Applications record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Budget** node.
3) Select **Payment Applications to Owner**.
4) From the BP log page, click **Create**.A new Payment Applications to Owner business process form opens. Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in your **Drafts** folder.
5) In the **Line Items** section either click **Add** or **Grid**. The Line Items List opens.
6) Complete the Line Items list according to the Line Items table below. You must complete all required fields before you can save the Line Items form.
7) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.
   - If you are using the grid and do not click Save before closing it, you will lose your line item changes.
   - The SOV structure is derived from the Payment Applications detail form.
8) Complete the Line Items form according to the Line Items table below. You must complete all required fields before you can save the Line Items Grid.
9) Click **OK** to save the Line Items.
10) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.

11) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task on the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
12) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
Record Number	This is a read-only field that Unifier populates when you click Send.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	This field is auto-populated from the contract.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date shows when the record is due, based on the business process setup. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Other Details and Comments	Enter any additional comments.
Contract/PO*	This is a required field - Select the reference contract. This selection drives contract-related field values.
Contract No	This field is auto-populated from the contract.
Contract Type	This field is auto-populated from the contract.

In this field	Do this
Priority	This field is auto-populated from the contract.
Vendor ID	This field is auto-populated from the contract.
Contract Title	This field is auto-populated from the contract.
Contract Date	This field is auto-populated from the contract.
Expiry Date	This field is auto-populated from the contract.
Vendor Name	This field is auto-populated from the Vendor record.
Invoice Date*	This is a required field - Use the calendar icon to select the date of the invoice.
Payment Due Date*	This is a required field - Use the calendar icon to select the date of the invoice.
Work Retainage %	Enter the amount to retain from each payment. The Payment Applications SOV tracks retainage.
Check No	This field is read only until the record reaches the End step, where you can manually enter the check number.
Check Processed Date	This field is read only until the record reaches the End step, where you can manually enter the check processed date.
Check Date	This field is read only until the record reaches the End step, where you can manually enter the check date.
Original Contract Amount	Unifier auto-populates this value based on the contract selection.
Net Changes by Change Orders	Unifier auto-populates this value based on net changes to change order amounts (additions and reductions).
Revised Contract Amount	Unifier auto-populates this value based on the formula: Original Contract Amount + Net Changes by Change Orders
Total Work Completed	Unifier auto-populates this amount based on the sum of line item entries from this business process.
Total Retainage	Unifier auto-populates this amount based on the sum of line item entries from this business process.
Total Earned Less Retainage	Unifier auto-populates this amount based on the sum of line item entries from this business process.
Total Previous Payments	Unifier auto-populates this amount based on the sum of line item entries from this business process.
Current Payment Due	Unifier auto-populates this value based on the line item amount, less retainage.
Balance to Finish Plus Retainage	Unifier auto-populates this amount based on the sum of line item entries from this business process.

In this field	Do this
Add Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
Previous Add Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
This Period Add Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
Deduct Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
Previous Deduct Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
This Period Deduct Change Orders	This is a read-only field. The value is calculated using the formula: Deduct Change Orders<uconApvdDeductChgQE> - Previous Deduct Change Orders<uconPrvApvdDeductChgQE>
P6 Activity	Select a P6 activity.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Item Logs

Line Items Tab

In this field	Do this
General block	
Cost Code*	This is a required field -Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	The code name is auto-populated from the cost code.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Description	This is not a required field - Enter a description for the line item.
Commit Short Description	Enter a short description for the commitment.
Work Package	You can select a Work Package.
Payment Application block	

In this field	Do this
Scheduled Value	Unifier calculates the schedule value based on the formula (approved contract + approved change orders) for that contract.
Previous Work Completed	Unifier carries forward the value from previous Payment Applications records.
Work Completed (This Period)	Enter a value for the amount of work completed, (based on a portion, or all, of Item Quantity).
Total Work Completed	Unifier calculates this value based on the formula (Previous Work Completed + Work Completed (This Period))
Percent Complete	Unifier calculates this value based on the formula (Total Work Completed / Scheduled Value)*100
Balance To Finish	Unifier calculates this value based on the formula defined by the user in the detail form of Payment Application.
Previous Retainage	Unifier carries forward the value from previous Payment Applications records.
Work Retainage%	Unifier auto-populates this field from the Upper form of this record.
Retainage (This Period)	Unifier calculates the period retainage value based on the formula ((Work Completed (This Period) * Work Retainage%)/100)
Retainage Released	Enter a value for the amount of retainage paid on this cost code.
Total Retainage	Unifier calculates the total retainage value based on the formula (Previous Retainage + Retainage (This Period) - Retainage Released)
Total Earned Less Retainage	Unifier calculates the total earned less retainage value based on the formula (Total Work Completed - Total Retainage)
Total Previous Payments	Unifier auto-populates this value from the upper form of this record.
Current Payment Due	Unifier calculates the currently due payment based on the formula (Total Earned Less Retainage - Total Previous Payments)
Balance to Finish plus Retainage	Unifier calculates the balance-to-finish-plus-retainage value based on the formula (Scheduled Value - Total Earned Less Retainage)
Total Payments	Unifier calculates the total payments value based on the formula (Total Previous Payments + Current Payment Due)

Routing a Payment Application to Owner from the Review Step

To route a record from the Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
     - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
     - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
     - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the Payment Applications record and determine the appropriate course of action.
5) From the toolbar, click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing a Payment Application Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Revision step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

     The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the Upper form section, you can change the following record details.
     - In the *General* block, you can revise the record **Title**.
     - In the *Contract Information block*, fields are read only.
     - In the *Vendor Information block*, all fields are read-only and come from the vendor selected on the contract.
     - In the *Payment Application block*, you can edit **Vendor Pay App No**, **Invoice Date**, **Payment Due Date**, and **Retainage %**.
4) In the **Line Items** section you can modify or delete line items. Changes to line items dynamically update fields in the Upper form's *Payment Application block* and the Payment Applications SOV.
5) When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.

   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Cancel** — This action sends the record to the **End** step in Canceled status. The To and Cc field are unavailable.
6) In **Action Details**, depending upon the workflow action selection, select who should receive the task and who should be copied on the action.
7) When ready, click **Send**.

Viewing a Payment Application to Owner Record on the End Step

his is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a Budget Items record on the End step:

1) Go to your project and ensure that you are in User mode.
2) Click to expand the **Financial Transactions** node.
3) Expand the **Budget** node.
4) Click **Payment Application to Owner**. The Payment Application to Owner log opens.
5) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.

Commitments

Request for Bid Business Process

Purpose

The Request for Bid (RFB) business process allows companies to invite bids from vendors and suppliers. You can solicit bids from a specific set of vendors, or you can open the bid to all of the vendors listed in the Vendors log, as long as the Vendor record contains a valid email address. Each bidder receives an email notification of the bid invitation and login credentials to a private and secure Unifier workspace from which they can submit a bid. The Unifier interface is highly simplified so it does not require training to use.

Business process characteristics

Requests for Bid is a project-level business process with line items and a work flow. It collects all bids in a bid comparison sheet to help you compare received bids. When a winning bid is selected, it auto creates a Contracts record and auto populates the upper form and tabs with the vendor and award details. An individual help file is available for this business process.

Groups associated with this business process

- Assemble Initial Bid Package Step: Project Coordinators
- Bid Package Finalization Step: Project Managers. All Project Users can be copied.
- Package Revision Step: Project Coordinators. All Project Users can be copied.
- Bid Invitation: Project Coordinators. All Project Users can be copied.
- Analysis and Award: Project Managers. All Project Users can be copied.

Statuses

- Pending, a non-terminal status
- Approved, a terminal status
- Rejected, a terminal status
- Withdrawn, a terminal status
- Canceled, a terminal status

Additional Information

There must be a bid URL and bid manager defined in the company properties.

- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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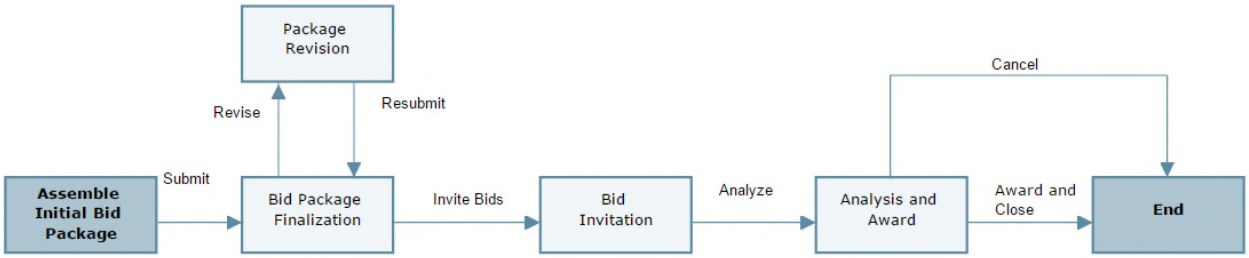
Requests for Bid Workflow

The Requests for Bid workflow involves creating a Requests for Bid (RFB) record, revising it if necessary, and inviting vendors and suppliers to bid on the project. The business process supports an internal review that you can use to verify the scope of the project, as well as other things, such as terms and conditions, architectural drawings, and structural materials. After you create the bid request you can route if for approval, or you can directly start the bidding process.

Each vendor receives a Unifier URL and password that will open a private, secure workspace where the vendor can complete and submit the bid. Vendors have the option of requesting clarification for questions or issues before submitting the bid; they can use the Mailbox link on the bid request for this purpose.

Once you send bid invitations, you must wait until after the bid due date to evaluate any received bids. When the due date for the RFB is reached, you can compare bids using the Bid Comparison Sheet. In Classic View, you also have the option to open discussions about the bids.

When you are ready you can award the bid to a vendor.



Creating a Requests for Bids Record

Prerequisites

You must have a bid URL and a Bid Manager Account defined on the **General** tab of the company properties page.

To create a new Requests for Bid record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.
3) Select **Requests for Bid**.
4) From the BP log page, click **Create**.
5) Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in the **Drafts** folder.
6) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
   - Line items provide a granular scope by cost codes.
   - The bid initiator creates line items which are the items the bidder is to bid on.
7) Complete the Line Items list according to the Line Items table below. You must complete all required fields before you can save the Line Items form.
8) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.
9) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
10) In **Action Details**, select who should receive the record.
    a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
    b. Select the user or group who will receive the task on the Approval step.
    c. Click **Add**.
    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
    e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.

11) Click **Send** to route the record to the **Approval** step.

As soon as you send the first invite, Unifier captures the date and the time stamp of the invite under **Invite Date** column of the **Vendors** tab log.

The same date and time would be automatically updated in the `uuu_date type` data element: **RFB Initiate Date** (`uuu_rfb_initiate_date`). If the DE is added on the upper form, the captured value should be visible to the requestor.

The date and time of the first invite that was sent is captured on the requester upper form (where the `uuu_date_type` data element is added), go to **Create New Requests for Bid** window > **Request for Bid** tab > **Bid Package Details** block > **RFB Initiate Date**.

Once the public bids are sent to the "Invite" step, and the task is accepted, the **Invite** option is enabled for the bid package. In the **Workflow Action Details** window, the **Workflow Actions** drop-down, click **Invite Bids**.

Once the user clicks **Invite**, the upper form is locked and disabled, and the user cannot make any changes. When the user clicks Yes, Unifier informs the user that the bid is now open for all the vendors to start the bidding process. The date and time stamp, when the user clicks **Invite** for public bidding, can be used for populating the value on the upper form field, the **RFB Initiate Date**. The bid invitation is automatically sent to the vendors in the system.

Routing a Requests for Bid Record from the Bid Package Finalization Step

Upon sending the business process form forward to the **Bid Package Finalization** step, Unifier creates a permanent business process record and sends a task. A task assignee can see the task in the **Tasks** log. When working on the **Bid Package Finalization** step, first you accept the task, then when you are ready to do so, route the record to either the **Package Revision** step or directly to the **Bid Invitation** step.

To route a Requests for Bid record from the Approval step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You can make changes to most fields in the Upper form. The only fields you cannot change are Record Number, Project Number, Project Name, Due Date, Status, Bidders count, and Bid Count.
   - You can make changes to Line Items when you are on this step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the Creation step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) When ready, select the workflow action **Submit Revised Package.**

   This action sends the record back to the **Package Revision** step. The **To** field is preassigned and you can **Cc** anyone listed in Users/Groups. You can add instructions to the task recipient using **Task Notes**.

5) In **Action Details**, select who should receive the record. **To**... is preassigned for both selections, but you can select message recipients in the **Cc** field.
   a. Click **Cc...** Select the user or group who will receive the record on the next step.
   b. Click **Add**.
   c. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.

6) When ready, click **Send**.

Routing a Requests for Bid Record from the Package Revision Step

Upon sending the business process form forward to the **Package Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a Requests for Bid record from the Package Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Review step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form.
5) Click **OK** to save Line Items.
6) When ready, select a workflow action. The choice is:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.

   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the Bid Package **Finalization** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.

e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
f. Click **Add**.
g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.

- This action activates **Action Details**.

7) In **Action Details**, select who should receive the task and who should receive a copy of the record.
8) When ready, click **Send**.

Inviting Bidders to Submit a Bid

To invite a bidder to submit a bid

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

- Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Review step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form.
5) Click **OK** to save Line Items.
6) In the Requestor block there are three required fields:

- **Name** — Unifier auto-populates this field from the user profile of the record creator, but it is editable and you can change it if desired.
- **E-mail** — Unifier auto-populates this field from the user profile of the record creator, but it is editable and you can change it if desired.
- **Phone** — Unifier auto-populates this field from the user profile of the record creator, but it is editable and you can change it if desired.

7) Click the **Invite** button. This action saves the record and disallows further modifications until after the due date. The Invitations window opens.
8) Click the **Add** button in the toolbar. The Vendors window opens and displays a list of available vendors.

9) Select the vendors that you want to receive the Requests for Bid and click the **Attach** button. Unifier displays the selected vendors in the Invitations window.
   - You can add multiple vendors at once by using your keyboard's Shift key or Ctrl key.
   - If desired, you can add additional vendors, or remove them from the list as needed.
10) Select a vendor and click the **Send Invitation** button.
11) On the Confirmation dialog box click **Yes** to continue with the bid invitation or **No** to halt the bid invitation. If you selected Yes, an invitation to bid on the project is sent to the vendor's email address on file in the Vendors record.
12) Select the same vendor to whom you just sent the bid invitation and click the **Send Password** button. This action sends the vendor a user name, password, and URL which is needed to access a private, secure Unifier workspace where he or she can prepare the bid.

Copying an Existing BP

When a requestor sends out the bid package to the bidders, the bidders receive the request along with its line items. The line items field can have the following information:

- **Unit Price**
- **Quantity**
- **Unit of Measure**
- **Amount**

The requestor enters values in the line items fields and submits the request.

When a requester creates a new Request for Bid (RFB) BP, or when a bidder responds to an RFB, both the requestor and the bidder can copy an existing BP, respectively.

When copying an existing BP (whether to create a request or respond to a request), Unifier copies the values of all line items of the source BP. The administrators have the option to either allow or prevent the values to be copied over to the new BP.

If a requestor, or bidder, decides to copy an existing BP and create a new request, or response, the values of the line items fields gets copied into the new BP (request or response). Since the inclusion of the values can cause conflict, Unifier enables the users (requestor admin or bidder admin) to reset the values of copied fields, in uDesigner, when copying an existing BP that is going to be used for a new BP.

Once the listed fields are selected in the uDesigner options, Unifier will automatically avoid copying of the requestor or bidder data elements accordingly. As a result, the values for the selected fields will be blank in the form and the user can enter new values.

As a bid package creator or requestor, you will be able to:

- Add vendors and send out invites.
- View the submitted response, by the invited bidders.
- Send emails to vendors, from the "Proposal Management" tab, by selecting one or multiple vendors at a time.
- Remove the added vendors from the list, if they have not been invited already.
- View the vendor details, by selecting the vendor record.
- Compare the bid submissions, from the "Proposal Management" tab.
- Award bid or cancel award, from the "Proposal Management" tab.

- Add addendum or access linked mails from the "Proposal Management" tab.

Proposal Management Tab

The **Proposal Management** tab will have the option to add vendors and send out invites. The bid received will also be listed in the **Proposal Management** tab. The following scenario explains the function of the **Proposal Management** tab.

Employee 1 (Requestor) initiates a bid package and adds the bid-related line items and submits the bid package to Employee 2 for review.

Employee 2 reviews the bid package and sends the bid package to the "Bid Invitation" step in the workflow.

Unifier adds the **Proposal Management** tab to the bid package, automatically, if the **Send bid invitations and allow bid receipt** option (in uDesigner, Requests for Bid > Upper Form > Properties > Options) is checked.

> **Note**: Starting with the 20.11 release, the **Invite** option will not be available in the **Menu Options** drop-down.

The **Proposal Management** tab opens and provides the following options:

Field	Description
Add	To add vendors. Unifier launches a picker with references to Master Vendor List or the Project Vendor List (depending on the **Send bid invitations and allow bid receipt** option selected in uDesigner).
Send Invitation	Once the vendors are added to the screen, Employee 2 can select the vendor records and click "Send Invitation" to send the invites to the selected vendors, listed in the window.
Actions	Contains options such as: - **Send Mail** - **Send Password** - **Remove** See below for details on the **Actions** options.
Refresh	To refresh the list of items on the window.
Find on Page	To search and find any particular vendor record.

The details for the request is displayed in the upper portion of the **Proposal Management** tab. These details include fields and columns.

Fields	Columns
Due Date	**Proposal**

Fields	Columns
Requestor Name	**Status**
Email	**First Name**
Phone	**Last Name**
	Company Name
	User ID
	Invite Date

The above fields are editable. Once edited, the new values are saved automatically. The values of the fields listed will be fetched from the Vendor BP, in the BP log.

When Employee 2 clicks **Add**, Unifier launches the Vendor picker which references to the **Master Vendor List**.

Employee 2 can select the vendors to be added to the **Proposal Management** tab. The selected companies on the right section would be added to the **Proposal Management** tab log, displaying the values for the "uuu_contact_company" and "uuu_user_id" columns.

- If Employee 2 clicks **Add**, then the selected vendor records will get added to the **Proposal Management** tab.
- If Employee 2 clicks **Cancel**, then the action will be canceled.

Once the selected vendor records are added to the **Proposal Management** tab, the status of the invites would reflect: "Not Invited," and the "Invite Date" would be blank, as the invitation has not been sent yet.

Employee 2 can select multiple vendor records (Unifier would highlight the records in blue color) and click **Send Invitation**.

When Employee 2 clicks a vendor's record to send, the first invitation (from the Proposal Management tab) will appear indicating that the upper form would get locked for any further changes.

If Employee 2 clicks **No**, then the invitations would not be sent.

Once Employee 2 clicks **Send Invitation**, Unifier will display a confirmation request. Once Employee 2 clicks **Yes**, the invitation will be sent to the selected vendors. Clicking **No** will cancel the invitation.

Once the invites are sent, Unifier updates the invite sent date and time in the "Invite Date" column of the **Proposal Management** tab. In addition, the status of the invite would be updated to "Not Responded," from "Not Invited."

When the bidder takes an action on the invite, the invite status will turn to one of these:

- **Submitted**
- **Awarded**

- **Viewed**
- **Not Responded**
- **Not Invited**
- **Accepted**
- **Declined**

See ***Opened or Viewed Bid Invitation*** (on page 223) for details on each status, above.

The *gear menu* (⚙) options for a vendor record are:

- **Open Vendor Details**

  To open the vendor details in a pop-up window and reference the details from the Vendor BP. The requestor will be able to view the vendor details only if the requestor has permissions to view. When you click this option the **Vendors** window opens with the **Vendor Details** tab displayed.
- **Send Mail**

  The user initiates a new email to all of the selected vendor records. See ***After the RFB Due Date*** (on page 204) for details on how to continue working with the bidders even after bid closes.
- **Send Password**

  To send password to the selected vendors.
- **Remove**

  To remove vendors from the list in the Proposal Management tab log. You can only remove the vendors who have not received an invite (Status = Not Invited).

Any addendum that needs to be sent to all of the invited vendors will have to be sent from the **Attachments** tab of **Proposal Management** tab. If a vendor is added to the **Proposal Management** tab, Unifier selects the first vendor record by default.

The **Linked Mail** tab displays:

- All of the invitations that have been sent.
- All of the initiated emails.

The *gear menu* (⚙) options for an uninvited bidder (Status = Not Invited) is as follows:

- **Open Vendor Details**
- **Send Invite**
- **Send Password**
- **Remove**

Once the RFB due date has been reached, the **Proposal** column is displayed (if the **Send bid invitations and allow bid receipt** option in uDesigner is selected). The **Proposal** column contains a **View** link for all of those vendors who have submitted a response.

If anytime before the bid closure date the bidder withdraws the submission, the **View** link will be removed automatically, and the bid status would become **Withdrawn**.

If the option **Display bid responses before RFB Due Date** (in uDesigner) is not checked, then the **Proposal** column would not be available for the requestor. The **Response** or **Proposal** columns would only be available after the RFB due date.

After the RFB due date, you have the option of comparing bids and determine the winner bid (Award Winning). In this case, the **Add** and **Send Invitation** options are no longer available.

- See ***After the RFB Due Date*** (on page 204) for details on comparing bids.
- See ***Before the RFB Due Date*** (on page 202) for details on how to view the bid responses before the RFB is due.

A requestor can select the vendor record and can click **Award Winning Proposal**, or the **Award Winning Bid** option from the gear icon, to award any particular vendor who has submitted the bid response. The **Award Winning Bid** option would only be available in a step where "Winning bid" picker is added. Once awarded, the **Award Winning Bid** option would be disabled, unless the requestor cancels the awarding. Also, if the requestor selects any vendor record with the status other than "Submitted" (for example, In Progress, Not Responded, Not Invited, and so forth), the **Award Winning Bid** option would be disabled.

When the user clicks **Award Winning Bid**, Unifier displays a pop-up window that contains the details of the bid response.

When the user clicks **Confirm**, the vendor is awarded the bid.

When the user clicks **Cancel**, the action will get canceled.

The awarded vendor name appears in the upper form of the **Winning Bid** picker.

A requestor can select **Cancel Award** to cancel an awarded vendor. The Cancel Award option is available under the gear icon menu of the awarded vendor record, only. Once the award is canceled, the status will be reverted to "Submitted."

Sending email to vendors

The following provides a scenario in which a requestor sends email to the vendors.

When a user (a bid requestor) logs in to Unifier with a bid requestor ID, depending on the type of workflow at the BP level, the user will:

1) Navigate to the RFB type BP.
2) Create a task and send it to an approver (administrator, project manager, or someone who can approve the request).
3) The approver accepts the task, clicks the **Proposal Management** tab, clicks **Add**, and adds the relevant vendors who must receive the invite.
4) The approver sends the bid invitation to the vendors.

At this point the bid request has been sent out. If the requestor needs to contact the vendors after the bid request has been sent, the requestor can click the *gear menu* (⚙) next to the record and click **Send Mail**. Alternatively, the requestor can use the **Actions** option and send email to the vendors from the list of vendors.

> **Note**: The **Send Password** and **Send Invitation** options will not be made available at this stage.

The **Linked Mail** tab lists all emails sent.

The requestor can reply to any of the emails that have been sent. The requestor has the option to email multiple vendors.

The **Linked Mail** tab will be available for the bidder to access, view, and reply to the emails that have been sent to the bidder after the RFB due date. The bidder can use the **Add** option to initiate communication with the requestor, after the RFB due date.

All of the emails sent by the bidder will be included in the **Linked Mail** tab.

The bidder can access emails sent by the requestor by way of the **Mailbox**.

Before the RFB Due Date

Before the RFB due date is met, and while the bid solicitation is in progress, the **Actions** menu will display the following options:

> **Note**: The following options are applicable to the Private Bidding, only. The following options are not applicable to the Public Bidding.

- **Send Mail**

  Where the user can select any vendor record and click **Actions** > **Send Mail** to initiate an email chain with the selected vendors.
- **Send Password**

  Once the Invite is sent, the user can select **Send Password** (from the **Actions** menu) and send the password to the selected vendors.
- **Remove**

  The user can select the vendors from the log and click **Remove** to delete the vendors from the list. The user can remove the vendors for whom the invite has not been sent yet, only (Status = Not Invited).

You can initiate an email chain with the vendor after the RFB due date. Use the *gear menu* (⚙) options, or the **Actions** menu (**Send Mail**).

At the BP-level (BP record log), the **Menu Options** will have the following options, when clicked from **Proposal Management** tab:

- **Print**
- **Reload**
- **Review**
- **Terminate Record**
- **Transfer Ownership**
- **Undo Accept Task**
- **Help**
- **Close**

In the case of Private Bidding, all vendor management is done in the **Proposal Management** tab. In the case of Public Bidding, you must use the **Invite** option (from the **Menu Options**) to initiate the bidding process.

The option to award a winning bid would not be available before the due date.

The following explains the available functions before the RFB due date is met.

Pre-approving Bidder

When a bid is open, the requestor can invite bidders. In addition, the requestor can pre-approve the list of bidders as part of the workflow process, in uDesigner. This will help the requester to monitor the list of bidders that need to be added to the bid invitation so that only the valid, or applicable, list of bidders get the invitation and the bidding process can be quickly completed.

The requestor can:

- Add pre-approved bidders, from the available list of vendors. If the pre-approved list of vendors are added, a user (project user) cannot add additional vendors to the list and the **Add** option will be disabled.
- Delete any added vendor from the approved list.

The following explain how to add bidders from the available list of vendors to the pre-approved list of bidders (detail form).

Navigate to the RFB BP (Project or Shell > **User** mode > **Requests for Bid**) and click **Create** to launch the task creation, or bid creation.

In this scenario, you can add the vendors and accept the bid package. Alternatively, you can accept the bid package and add the vendors.

If you select the **Add** option or the **Remove** option of the pre-approved vendors, then the **Vendor** tab will include the **Add** and **Remove** options in the **Actions** list. You can add vendors to the **Proposal Management** tab (or remove vendors) and send the bid package to the next step in the workflow.

When you click **Add**, a pop-up window opens which provides access to the **Master Vendor List**, and you can select vendors to add.

> **Note**: The requestor details will not be available in the upper part of the screen until the **Send Invitation** option is enabled.

You can add vendors from the **Add Vendor** window. In this scenario, you must select the vendors, from the list of available vendors, and click the right-arrow to add your selected vendors to the **Add Vendor** window. When finished, click **Add** to add your selected vendors to the **Proposal Management** tab. At this point the vendor records will get added to the log.

The following options will be available to select:

- **Add**

  To open a pop-up window referencing the Vendor BP (for example, if the project vendor list is selected in uDesigner form properties, then A project-level vendor is displayed for selection).
- **Actions**

  To select any added vendor and delete the record. The **Remove** option would be available in this view as invitations cannot be sent from this step in the workflow.

When you receive a task from the project manager containing pre-selected vendors, you (user or requestor) have the option to accept or decline the task. In this scenario, if you select any, or both, of the following options, you can proceed to send the invitation. At this point, you cannot add new vendors:

- **Send bid invitations and allow bid receipt**
- **Do not allow modification of pre-approved Vendor list**

After accepting the task you can also send an email or send password by way of the **Actions** option.

In the workflow, once the Project Manager (or any user with the appropriate permission) adds the pre-approved vendors and sends the bid package to the next step (bid invitation), the added vendors will be added to the Proposal Management tab. At this stage, the list cannot be modified.

If the **View pre-approved vendor list** is selected, the **Add** or **Remove** option will be disabled. You can view the request and send the bid package to the next step.

You can send mail to a bidder before the RFB due date or after the bid is finalized.

> **Note**: The above condition is applicable only to private bidding and not to public bidding.

Requestor can see the submitted bids while the bid is still open

Ability to see the submitted bids while the bid is still open enables the requestor to compare the submitted bids, before the bid closure date. The requestor can see the bids submitted by bidders while the bid is still open; however, the user can choose whether to hide or show bid responses before bid closure.

The requestor can select multiple responses and click **Compare** in order to compare the responses with the requester values.

After the RFB Due Date

The **Menu Options** will have the following options, when clicked from **Proposal Management** tab:

- **CC more users**
- **Email as Attachment**
- **Print**
- **Review**
- **Transfer Ownership**
- **Help**
- **Close**

Submitting a Bid

A vendor can reply to the bid invitation by following these instructions.

To submit a bid invitation

1) Open the email titled **Invitation to participate in Bid Request**. This email contains bidding information needed to participate in the bidding process. This message contains:

   Bid Title: RFB - 002
   Record No: RFB-002

   From Requestor: Bid Requestor
   Email: abc.efg@*your-company.com*
   Phone: 999-999-9999

   Sent For: Bid
   Bid Due: 06/24/2013 05:00 PM

   To take action on this bid, please click here:
   http://abc.your.company.com

2) Open the email titled **Information to access Bid Request**. This email contains information need to access the Bid Request.

   User Name: vendor.name@vendor.com
   Password: 373B109A

   Bid Title: RFB - 002
   Record No: RFB-002

   From Requestor: Bid Requestor
   Email: bid.requestor@oracle.com
   Phone: 999-999-9999

   Sent For: Bid
   Bid Due: 06/24/2013 05:00 PM

   To take action on this bid, please click here:
   http://abc.your.company.com

3) Click the bid link. The Unifier sign in window opens.
4) Enter the **Username** and **Password** sent to you in the email titled **Information to access Bid Request**.
5) Click the **Sign In** button. A secure and private Unifier workspace opens.

   Under the Vendor Home node there are two sub-nodes:

   - **Mailbox**, which you can use to communicate with the Bid Requestor
   - **Requests for Bid / Bids**, which opens the bid preparation workspace.

6) Click the Requests for Bid / Bids node. The bid preparation workspace opens.
7) Prepare your bid by modifying the line items in the bid record. Line items are the only thing you can change on this record.

   Using the buttons on the toolbar you can:

   - Submit your bid. You can withdraw your bid and rework it prior to the bid due date.
   - Save a draft of your bid.
   - Delete your bid.
   - Add an attachment.
   - Close the bid window.

8) Click the **Submit** button to submit your bid.

Submission Status in the log

If a request for bid record has been created in the 20.9 release of Unifier (or after the release), then the following applies to the **Submission Status** in the bidder portal log:

- Whenever a bid record is opened, the current status will be displayed, based on the submission status in the log form.
- In each of the current status fields a corresponding actions is made available by way of the menu option (three horizontal lines icon).
- The actions on the form, and in the menu option (three horizontal lines icon) are applicable only if the bid is open; otherwise, the actions will not be available if the bid record is closed.

Submission Status in the bidder portal log (Applicable if the records are created after upgrading to Unifier 20.9)

Trigger	Submission Status in the log	Status displayed, when form opens	Actions available on the form	Menu options
Bidder clicks Decline	Declined	Submission Status: Declined	Save Draft - Submit Proposal	Undo Decline
Bidder clicks Accept	Accepted	Submission Status: Accepted	Not applicable	Undo Accept
Bidder clicks Withdraw	Withdrawn	Submission Status: Withdrawn	Submit	Undo Accept
Receive a request for bid	Not Responded	You have been invited to participate	Accept - Decline	Not applicable
Bidder views the record from uMail/BP log and takes no action	Viewed	You have been invited to participate	Accept - Decline	Not applicable
Bidder clicks Undo Accept	Viewed	You have been invited to participate	Accept - Decline	Not applicable
Bidder clicks Undo Decline	Viewed	You have been invited to participate	Accept - Decline	Not applicable
Bidder clicks Submit Proposal	Submitted	Submission Status: Submitted	Withdraw (If the RFB due date is not reached)	Not applicable

Submission Status in the record (Applicable if the records are created before upgrading to Unifier 20.9)

Trigger	Submission Status in the log	Status displayed, when form opens	Actions available on the form	Menu options
Bidder opens the record and then closes or doesn't open the record before upgrade	Not Responded	You have been invited to participate	Accept - Decline	Not applicable
Bidder creates a proposal and does not submit	Accepted	Submission Status: Accepted	Save Draft - Submit Proposal	Undo Accept
Bidder deletes a previously submitted proposal	Not Responded	You have been invited to participate	Accept - Decline	Not applicable
Bidder submits a bid proposal	Submitted	Submission Status: Submitted	Withdraw (If the RFB due date is not reached)	Not applicable
Bidder withdraws a submitted bid proposal	Submitted	Submission Status: Accepted	Save Draft - Submit Proposal	Undo Accept

Viewing Bid Log

When you open the bidder portal (for example the **Requests for Bid** node), the bidder portal log (for example the **Requests for Bid** log) opens. Your company name (the company name from the **Company Properties**) displays in the header after the Unifier logo and environment name.

> **Note**: If the “Reset the values of these fields of the Requestor Detail Form when line items are viewed by a bidder:” option is checked, then the line items seen in the **Requestor Package** > **Standard** tab will have blank values for these fields (Requestor Detail Form). This is applicable to all the previously submitted, closed bids RFB records.

The bidder Portal log columns are as follows:

- **Attachments** (paper-clip icon)
- **Submission Status**
- **Due In**

- Columns configured in uDesigner

In the **Submission Status** column, the Bidder Proposal Status is displayed. Note that this is not the record status. The following is a list of Proposal Submission Status values:

- **Not Responded** : No action (accept/decline) taken yet
- **Viewed**: When the Bid is opened from BP log or from uMail
- **Declined**: When bid is declined
- **Accepted**: When bid is accepted
- **Submitted**: When bid is submitted
- **Withdrawn**: When an already submitted bid is withdrawn

In the **Due In** column, the difference between the current time stamp and RFB due date time stamp is shown in this column. Here are scenarios that can explain the process:

Let the difference be X.

If X >= 1 day Column should display <X> Days

If X <= 3days <X> Days shown in red color

If the <X> difference < 1 day && >=1 hour Column should display <X> Hours

If the <X> difference < 1 hour && >=1 Min Column should display <X> Min

Min is the least unit of measure for due in Column

If X < 1 Min Column should display Less than a Min

If Current Time stamp crosses RFB due date due in column should display Reached (Color #979797)

View option

The **View** option has the following views in the drop-down list, in the bidder portal log:

- **Due in < 3 days**

  To display all the records with the RFB due date approaching in the next 3 days.

Adding an Attachment to a Bid

You can upload and attach supporting documentation to your bid submittal.

> **Note**: Unifier does not allow the inclusion of the bid proposal attachments in document manager. To see the bid proposal attachments, for a record, navigate to the proposal management tab and view the proposals, from each bidder and their respective attachments, individually.

- ***To add an attachment to a bid proposal***

1) In your open Requests for Bid record, click the **Add Attachment** button in the record tool bar. The File Upload window opens.
2) Click the **Browse** button. The Choose File to Upload window opens.
3) Browse to the file that you want to attach to your bid. You can only select one file at a time.
4) Click the **Open** button. Unifier displays the file path and name in the File Name column.

a. Click the **Add Row** button to browse to and select additional files.
b. Select a row and click the **Remove** button if you do not want to upload a selected file.

5) Click the **OK** button. The **Attachments** link shows the number of record attachments.

Active Bids in Bidder log

When you open the **Attachments** tab, the following blocks and sub-blocks will be present, depending on the bid status:

- Unpublished Attachments
  - Addendums
- Published Attachments
  - Original Attachments

All of the active bids can receive additional attachments, from the . When the bidder opens or views the bidding in the log requestor, the new or additional attachments will be shown under the **Addendums** block.

When a bid receives a new attachment, as addendums, then Unifier sends a new email to all of the bidders. Unifier sends a similar email when an existing bid attachment is removed.

Refer to the "Audit Log in Requestor BP (Private Bid and Public Bid)" section of the Unifier Business Processes User Guide for details about the information captured in the Audit Log.

If the checkbox to add the winning contract Record attachments to Requestor Record Attachments is checked in admin mode, then the winning bidder documents from the record level (upper form of bidder BP) is displayed in a separate section.

The name of the sub-section depends on the “Winning Bid” Detail Form tab name appended with “Documents,” at the end.

Example

If the “Winning Bid” Detail Form tab name is “Winning Contract,” then the name of the sub-section (under which the documents are displayed) would be “Winning Contract Documents."

Since the bidder documents are always external (outside of Unifier), the documents will always be categorized as "Unpublished category" (until the RFB moves to the next step, and the documents are published to Document Manager.

Other documents, similar to the requestor attachments added while creating a bid request or any addendum, will be listed in order.

All the options which are generally available for any attachments added to a record are available for the winning bid documents, once the documents are added.

If the option to attach the winning bid documents to the detail form is checked in the admin mode, then, the winning bid documents (of the winning bidder detail form) will be added against each winning bidder line item (the respective line item attachments against each line item).

If the following options in uDesigner are checked, and the winning bidder is allocated on the upper form, then Unifier will automatically add the winning bidder documents to the upper form, or the detail form, or both forms, based on the selected checkboxes:

- **Add all Record Attachments of the winning bid to Requestor's Record Attachments**

- **Add only Line Item Attachments from the winning bid to the Line Items of <Winning Bid Tab Name>**

Here are the steps:

- Step 1 (Admin mode)

  Both of the options are checked to attach the winning bidder documents to the requestor record, and the detail form.
- Step 2 (User mode)

  The requestor initiates a bid package and sends invitations.
- Step 3 (User mode)

  Bidder submits the response. The winning bid is selected from the responses received.
- Step 4 (User mode)

  Once the winning bidder is selected, the attachments from the bidder upper form are copied over to the requestor record (upper form), and the attachments from the bidder detail form (for each line item) are copied over to the requestor detail form against the same line items.
- Step 5a (User mode)

  The bidder saves the bid package and does not send the bid package to the next step in the workflow.

  In the Admin mode, the admin requestor unchecks the checkboxes for copying the winning bid attachments.
- Step 5a Result (User mode)

  The winning bid documents will not be removed automatically, upon changing the selection in admin mode. The selection in uDesigner, while a winning bidder is selected, will only be considered as available options.
- Step 5b

  The bidder sends the bid package to the next step.

  In the Admin Mode, the admin requestor unchecks the checkboxes for copying the winning bidder attachments after sending the bid package to the next step.

  In the User Mode, once the requestor opens the bid record, the winning bid attachments are available, and Unifier will not remove the attachments, automatically.

If the requestor deletes the winning bidder (picker data) and re-selects the winning bidder again, then Unifier will add the attachments to the upper form, or to the detail form. Since the trigger event is selecting the winning bidder, Unifier considers the uDesigner options at the time of selecting the winning bidder.

If the requestor changes the winning bidder before concluding the RFB record, then the attachments would change to the attachments belonging to the latest winning bidder.

> **Note**: RFB records that are created through auto-creation will remain as before.

Generally, the contract records are auto-created through RFB once the RFB is finalized. When this happens, Unifier copies any newly added attachments (winning bidder documents) based on the options selected in the auto-creation setup.

Once the winning bidder documents are added to the upper form, or the detail form, the documents are subject to Audit. The Audit log tab captures the addition of attachments in the log.

When the design of the RFB business process has the **Add all Record Attachments of the winning bid to Requestor's Record Attachments** option selected, the attachments from the winning bid will get copied over to the RFB record. If this RFB record is used as a source to copy the record in the RFB BP log, and the **Copy with Attachments** option is selected, then the attachments that belonged to the winning bid of the source record will not get copied over into the newly created record. In this scenario, all other attachments that came from the Requestor will get copied over.

Opening a Bid Draft

Follow this procedure if you closed your bid draft and want to open it before the bid due date.

- ***To open your bid draft***

1) Sign in to Unifier using the URL and sign in credentials the Bid Requestor sent you.
2) Click the **Requests for Bid / Bids** node. Unifier displays your draft bid in the Requests for Bid log.
3) Open your bid.
4) Click the **Create** button. When the record opens, you will see any previous changes that you made before saving the draft.
5) Make your changes to the line items. At this point you can either save your draft again, or submit your bid.

   If you submit your bid but decide to make changes to it, you can cancel the bid and resubmit it as long as the bidding process is still open.

In the bidder portal log, the Bid Package, Your Proposal, and Linked Mail have been combined and presented in one pop-up window. This is to enable the bidder to access information easily and without having to open multiple windows.

> **Note**: The functionality of Bid Package, Your Proposal, and Linked Mail will remain the same.

Tabbed Navigation

On top of the window, there is a navigation bar which contains tabs. You can click on each tab to switch between:

- **Bid Package** tab

  The bidder will continue to the upper form and detail form, in this tab.
- **Your Proposal** tab

  The bidder will see the upper form and detail form of the Proposal Record, in this tab.
- **Linked Mail** tab

  All mail communication related to a particular record will shown in this tab. This includes sent, received, and saved emails. The bidder can create a new email and view existing emails in the right pane of this tab. This tab will be a subset of mailbox that contains contents specific to one record.

When you click **No** for the "**Do you Intend to Bid?**" option, you need to confirm.

Withdrawing, Declining, or Accepting a Bid

After submitting a bid, you might want to withdraw the bid from the bidding process, or modify your original bid.

To withdraw a bid from the bidding process

1) Log into the bid site using the credentials and URL the bid requester sent you.
2) Select the **Requests for Bid / Bid** node. Unifier displays your bid in the Requests for Bid log.
3) Open the bid that you want to withdraw by selecting the bid the log and clicking the **View** button in the log tool bar. If you prefer, you can:
   - Click the **Open** button in the log tool bar.
   - Double-click the record.
4) In the bid record click the **Withdraw from Bid** button in the record toolbar.
5) Click **Yes** in the Alert dialog box. You receive an Alert telling you that the bid was successfully withdrawn and that you can modify your bid.
6) Click **OK**.

To decline or accept a bid

> **Note**: The following is applicable to private bidding and not to public bidding.

The option to decline or accept a bid by a bidder enables the requestor to know the number of bids received. Bidders are able to submit a bid even after they have declined it, in case they change their mind, in the bidder portal. On the RFB portal, the list of bidders who have declined is displayed. On the gird, you can see who has:

- Submitted a bid.
- Declined the bid.

On the RFB portal:

The bidder can withdraw from the bidding, accept or decline bids.

The requester can see the list of bidders who have declined bids, or the list of declined invitations, or the list of bidders who have submitted the bids, or the list of submitted bids.

1) Sign in to Unifier using the URL and sign in credentials the Bid Requester sent you.
2) Click the **Requests for Bid / Bids** node. Unifier displays your draft bid in the **Requests for Bid** log. On the bidder portal log records would be displayed with **Submission** status. You can identify the latest invite received and double click and open the record.
3) Open your bid.
4) "**Accept**" or "**Decline**" the invite.

When a bid invitation is accepted and the bidder closes the bid invitation without saving anything, the status would move to "**Accepted**." When bidder does undo accept or undo decline the record would move to the "**Viewed**" status.

When the bidder accepts the invite, the Your Proposal tab is generated on the portal (between "**Request Package**" and "**Linked Mail**" tabs).

These options are available until before the RFB due date. Once the RFB Due date passes, the options to accept or decline the invite would be removed for bidder.

The "**Submission**," "**Accept**," and "**Decline**" options are available in any active tab (the **Bid Package** tab and the **Requestor Package** tab). When the bidder accepts the invitation, Unifier will display the status on the top right corner of the screen, indicating **Submission** status as "**Accepted**."

The bidder has the option to save a draft or submit proposal at this stage.

The bidder can undo the "**Accept**" action through the option available under **Menu** (the icon with three horizontal lines), "**Undo Accept**."

Once the "**Undo Accept**" option is selected, Unifier displays a confirmation message.

- If the bidder selects "**Yes**," then Unifier executes the action and moves the record back to its previous status: "**Viewed**."
- If the bidder selects "**No**," then Unifier declines the undo accept action.
- If the bidder selects "**Decline**," then Unifier displays a confirmation message. Selecting "**Yes**" at this prompt moves the invitation status to decline and closes the record automatically. Selecting "**No**" at this stage will cancel the decline action and keeps the invitation record open.

The bidder can undo the decline action. To do this, the bidder must open the declined record and select the "**Undo Decline**" option. This action will undo the decline action and both the "**Accept**" and "**Decline**" options will become available. At this stage, the record status will move to "**Viewed**." If the bidder accepts an invite, the record status will move to "**In Progress**."

Resubmitting a Withdrawn Bid

You have until the bid due date to modify and resubmit your bid.

- ***To resubmit your bid***

1) Sign in to Unifier using the URL and sign in credentials the bid requester originally sent you.
2) Click the **Requests for Bid / Bids** node. Unifier displays your draft bid in the Requests for Bid log.
3) Open your bid. A read-only version of your Requests for Bid record opens.
4) Click the **Create** button. An active version of your original bid opens.
5) Make your changes to the bid line items.
6) Click the **Submit** button to resubmit your bid.

Communicating Bid Information Via Mailbox

Request For Bid (RFB) business processes have special linked Mailbox functionality. For RFB business processes, the creator of the RFB form will be allowed to correspond with internal users or with RFB bidders.

- ***To send a Mailbox message from an RFB form***

1) Open the Requests for Bid (RFB) business process form and click the Linked Mail link in the lower-right corner of the form. The Linked Mail window opens.

2) Click New and select one of the following:
   - **To Internal**: The Message window opens. The selection list for To, Cc, and Bcc includes your Unifier project or shell team, as in other Mailbox messages.
   - **To Bidder**: The Message window opens. The selection list for To, Cc, and Bcc is generated from the list of invited bidders.

     You will not be able to save a draft copy of the Mailbox from this selection.

The bidders will be allowed to view and access **Mailbox** once they are signed in to Unifier using their bidder's sign in credentials.

The bidders can also create and add **Mailbox** messages from the RFB form.

The **To** field is auto-populated with the requester name.

The **Cc** and **Bcc** options are not available; however, the bidders can fill in external **Cc** and **Bcc** fields with the external e-mail addresses.

When the bidders **Reply** to or **Forward** messages in the **Mailbox**, these messages will be linked with the record.

The bidders will not be able to create any new messages in the **Mailbox** after the bid due date.

Adding and Updating Bid Line Items with or without Attachments

A bidder can create or update line items in bulk using CSV import during the creation or update of their bids. There will be an additional Export and Import options available in bid request record when creating or revising bid.

Whether the bidder has permissions to add line items or update the bid line items, or not, in the bid line item tab (e.g., **Line Item List** tab), the **Export** option has two sub-options:

- **Export Line Item Template**

  Use to export the CSV template with all the data elements that are in bidder detail form.
- **Export All Line Items**

In this scenario:

- The existing bid line items are those line items that are received from a requestor, and the line items that are saved by bidder.
- A new bid line items are those line items that are newly created by the bidder.

The **Export** options can be seen in the **Grid View** as well. The **Import** option will be available in the **Form View** only when the bidder has the ability to add or modify line items.

By using the **Import** option bidder can add new bid line items or can update existing bid line items in bulk.

> **Note**: The **Import** option is not available in the **Grid View**.

When a user selects **Export All Line Items** Unifier downloads a CSV template which will have all the data elements, defined in the bidder detail form, as columns with the first column shown as '**D**'. The downloaded CSV template will not show any hidden data elements in the form.

When the **Export All Line Items** is selected, the CSV template file that is downloaded will contain all bid line items currently available. All of the data defined for the elements defined in the bidder line items will are included in the CSV template file. The column structure is similar to the CSV template (all of the data elements that are in bidder detail form (except the hidden elements) will be shown as columns). Additionally, the first column in the CSV template file will be seen as '**D**' to indicate as detail form and the second column will show '**Line No.**' which indicates the line number. The first two columns are fixed.

The **Line No.** column will export all of the line numbers for existing line items, and it is a unique number to identify the line item that you want to update.

> **Note**: The option **Export All Line Items** will be seen both in creation of bid and viewing bid submissions in the **Form View** and **Grid View**.

When you select the **Export All Line Items** option, and there are some line items that are not saved yet, the following confirmation message is displayed: "Unsaved data will be lost. Do you want to continue?"

- If you select **Yes**, then the CSV template file with all the saved line items will be seen.
- If you select **No**, then a CSV template file will not be generated, and the user will be shown the line item log.

Exported CSV Line Item Template

When you select the **Export Line Item Template** option from toolbar menu, Unifier downloads the CSV file template structure. The downloaded CSV template file will show all of the data elements that are part of the bidder detail form as columns. The first column will be shown as '**D** to indicate the detail form. By using this CSV template, you can create new bid line items in bulk.

The exported CSV line item template contains informational text.

> **Note**: The read-only columns will be shown in the exported CSV template. The columns that are required are shown with asterisk at the end of column name.

All of the data elements that are added to the bidder detail form is shown in the exported CSV template. The hidden fields and the **Image Picker** data elements will not be shown in the exported CSV template.

When you export the line item template, the existing bid line items will not be shown. You can import new bid line items using this CSV template. The required fields in the form are shown with asterisk symbol next to the column name in the CSV template.

The data provided for read-only fields will be ignored during the CSV import. The formula data elements is recalculated upon the CSV import. All of the form validations will take place when importing a new bid line items by using CSV template file.

The hidden data elements are not seen in the exported CSV template file.

Export All Line Items

When you select the **Export All Line Items** option from toolbar menu of the bid creation, or bid update, window, Unifier downloads the CSV file template structure. The downloaded CSV template file will show all of the existing line items. The option is available both in the create bid, or view bid, window.

As mentioned in the informational text in the file, you can add attachments by entering attachment name after the last column for every '**D**' row separated by a colon (:), for each attachment name.

The first and second columns in the exported CSV file are fixed. The first column will show 'D,' and the second column will be shown as Line No. The data elements that are in bidder detail form will be seen as columns, after the fixed columns.

The exported CSV line item template contains informational text.

> **Note**: The read-only columns will be shown in the header section of the CSV template file. The columns that are required are shown with asterisk at the end of column name.

All of the data elements that are added to the bidder detail form is shown in the exported CSV template. The hidden fields and the **Image Picker** data elements will not be shown in the exported CSV template.

The **Line No.** column will export all of the line numbers for existing line items, and it is a unique number to identify the line item that you want to update. All of the other columns will populate with the existing line item data. The remaining columns will be shown based on the bidder detail form.

This CSV template file can be used to update existing line items such as bid quantity, item unit cost, short description, and so forth.

Import Bid Line Items without Attachments

You can import the new bid line items by using the CSV line item template, in **Form View**. When creating new bid line items, you must enter the required fields data starting with the first column as '**D**'. The required field validation takes place during the CSV import, if the values are not provided in the CSV file for the required fields or columns.

If in uDesigner the bidder form properties window does not have 'Add/Remove/Copy line items' checked, then the import of the new line items will fail, and the following message displays: Do not have permission to add new line items.

All of the additional validations for the required fields (form validations) takes place when creating new lines using CSV import.

Unifier calculates auto-populate data elements and formula elements upon successful import of line items.

You can add new attachments to the line item using the CSV template file. Attachment names can be specified after the last data element, for each line item, to add attachments when creating a line item.

Import Bid Line Items with Attachments

You can add attachments if the Allow attachments to line item is selected in uDesigner (bidder form). You can create new bid line items along with attachments by specifying the attachment names at the end of each detail row, after the last data element in the CSV template. You can upload multiple attachments to the line item by providing multiple file names separated by a colon (:).

The **Import** window has two steps:

1) The first step is to upload the CSV file.
2) The second step is to upload all of the attachments that need to be associated with the line items.

You can upload the CSV file in the CSV section. You can also drag and drop the CSV file in the required section on the page. The **Next** option will be enabled only when you select the CSV file in the first step.

You can add attachments by using the **Add** option or drag and drop the attachments in the **Add Attachments** step in the wizard. After uploading all of the required attachments in the second step, the **Upload** option will be enabled.

In the add attachments screen, the following columns are made available for the attachments:

- **Name**

  Shows all of the attachments that are specified as part of the CSV file.
- **Size**
- Will be empty until you upload the file.
- **Status**

  Displays "waiting for the file" until you upload the attachment.

After you upload the required file onto the add attachments screen, the status of the file changes to: Ready to be Uploaded.

If there are no attachments to the CSV file, then this step will not enable the **Add** option and will show the informational text: There are no attachments associated with the CSV.

If the **Allow attachments to line item** option is not selected under Add/Remove/Copy line items for bidder form design in uDesigner, then the following message is displayed: Do not have permissions to add attachments to new line items.

All of the validations (such as valid file name, missing attachment, and so forth) related to the import of line items with attachments will take place while uploading attachments along with line item validations.

Import Bid Line Items (Update Existing Line Items with or without out Attachments)

You can update the existing line items with the CSV file downloaded, by using the **Export All Line Items** option from the toolbar.

- When you select the **Export All Line Items** option from toolbar export menu, the downloaded CSV file will have all the existing bid line items. Additionally, the **Line No.** column will be shown next to the '**D**' column which will populate the **Line Number** for the existing line items.

- Both the first and the second columns are fixed in the CSV file. The first column will show as '**D**', and the second column will show the existing line number for all the exported line items.
- The **Line No.** column will be used as a unique identifier to update the existing line items.
  - If the **Line No.** column is updated with a new value, and the value exists, then that line item will be updated.
  - If you did not specify any **Line No.** or removed the existing **Line No.** values, then a new line item will be created with a unique value.
  - If the **Line Number** value entered already exists for more than one line item in CSV file, then this message will be displayed: Duplicate value entered. The Line No. specified already exists.
- - When you tries to update the line items but in the bidder form properties the **Allow modifying line items** option is unchecked, then this message will be displayed in the error CSV file: Do not have permission to modify line items.

You can also add new attachments while updating an existing line items if the **Allow attachments to the saved line items** option is selected for the bidder form. All of the validations related to the import of attachments, along with line items, will take place while updating the line items with attachments.

If you try to add the same attachment which already exists in line item, then you cannot proceed with the import and the following message is displayed: <attachment_name> already exists in the line item <Line No.>.

When you try to add attachment while updating an existing line items through CSV import and in the design (uDesigner) the Bid form does not have the option **Allow attachments to the saved line items** option checked, then the following message is displayed in error CSV file: Do not have permissions to add attachments to the saved line items.

Auto-populate data elements and formula elements will be calculated upon successful import of line items.

Attachment names can be specified after the last data element, for each line item to add attachments when creating a line item.

> **Note**: Unifier does not support the inclusion of the image picker field in the CSV import.

CSV Integration Support the User-preferred Language

A bidder will be able to import the line items in the language selected, other than English. This is applicable to both CSV template and CSV data.

- All of the column headers will be shown in the selected language.
- All of the informational text will be shown in the selected language.
- The bidder can enter data in the preferred language.
- At the time of importing line items, the user-preferred language will be considered while updating or creating new line items.
- Exporting existing line item data in CSV template shows data in the same language seen in the user interface.

- Any system generated error messages is displayed in the user-preferred language, during CSV import fail.
- All of the validations (required fields, form validations, and so forth) will take place during import.

Comparing Vendors' Bids (Classic View)

Once the bidding process ends (after the bid due date has passed), you can open a bid tabulation to compare the bids you received. A default bid tabulation sheet is available in Unifier, or your company may have a custom-designed bid tabulation sheet.

When you have made a decision, contact the winning vendor to award the bid. If it is your company's policy to do so, inform losing vendors that they did not receive the bid.

To compare bids

1) Open the Requests for Bid record. The record toolbar contains a **Show** button.
2) Click the **Show** button. The Show window opens, listing the bids you received.
3) From the list, select the vendors you want to compare and click the **Compare** button. The **Compare** window opens displaying a bid comparison sheet.

The following table is a scaled down example of the bid comparison sheet.

- The first 15 Data Elements and their values are from the Requests for Bid business process Upper form.
- Bid line item entries are from the Line Item form. If a vendor adds line items to the bid, these line items will appear on the sheet as well.

Data Elements	Vendor 1	Vendor 2	Vendor 3
Bids			
Bid Package Instructions			
Bid Scope			
Location			
RFB Due Date	Date and time of bid due date	Date and time of bid due date	Date and time of bid due date
Question Cut Off Date	Date and time of question cut-off date	Date and time of question cut-off date	Date and time of question cut-off date
Dial-in Instructions			
Certifications			
Insurance			

Data Elements	Vendor 1	Vendor 2	Vendor 3
Date and Time			
Qualifications			
Order Delivery Date			
Bid Priority			
Bid Package Revision Number			
Notes/Resolution			
Bid Line Items LI-1			
Requestor Short Description	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Short Description	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Item Unit Cost	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Item Quantity	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Unit of Measure	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Amount	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Notes/Resolution	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
LI-2			
Requestor Short Description	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Short Description	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Item Unit Cost	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Item Quantity	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Unit of Measure	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry
Amount	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry

Data Elements	Vendor 1	Vendor 2	Vendor 3
Notes/Resolution	Vendor 1 entry	Vendor 2 entry	Vendor 3 entry

- Data Elements and their values are from the Requests for Bid business process Upper form.
- Bid line item entries. If a vendor adds line items to the bid, these line items will also appear on the sheet.

Winning Contract

You can populate the winning bidder information on the upper form, automatically. After selecting the winning bid, you do not need to again select the bidder details in order to populate all of the necessary information. You can select the winning bid and use the system to populate the data elements on the upper form and line items, in the **Winning bid** field. When the winning bid is selected in an RFB BP, if there is a BP Picker or a BP Data Picker in the Vendor BP, then it will be populated with a reference to the winning bidder.

> **Note**: The field names or the properties might vary as per the upper form configuration

The requester sends out the bid invitations and receives bid responses. After the RFB due date, the requester selects the winning bid among the responses received. In this process, usually, Unifier adds a winning bid picker in the upper form in order to select the winning bidder, close the bid, and create a contract. Once the winning bidder is selected, Unifier auto-populates the winning bidder details (including additional details such as the name, organization details (if any), email ID, contact number, and so forth) on the upper form.

Based on the selection made in the picker which references the Vendor BP (for example, Contract awarded to), the rest of the fields related to the vendor details are auto-populated.

The Requests for Bid window (Request for Bid tab), General block, captures the following information about the winning bid:

- **Winning Bid**

The Requests for Bid window (Request for Bid tab), Vendor and Awards Details block, captures the following information about the winning bid:

- **Contract Awarded to**
- **Contact First Name**
- **Email**
- **Vendor ID**
- **Contact Last Name**
- **Phone**

Based on the value selected in the **Winning Bid** picker, the vendor BP picker will be auto-populated in the upper form. When a user selects a value in the **Winning Bid** picker (references uuu_bid picker), Unifier auto-populates the selected vendor picker, according to the selection that was made in the Options tab of the BP configuration which references the vendor BP in the upper form. The values for other fields, such as **Contact First Name**, **Email**, and so forth, are also auto-populated based on the picker bidder, in the **Winning Bid** field.

> **Note**: The name of the fields or values being auto-populated will entirely depend on the way the upper form is configured.

Example

If the BP picker condition is set as not equal to "Active", and the vendor record example is: 0001 with status = Inactive, then Unifier ignores the condition setting.

When the user selects a BP Data Picker for auto-populate based on winning bid picker selection, if the BP Data Picker condition is set as, for example, the vendor name is not equal to Oracle, but the vendor record 001 selected has vendor name = Oracle, then Unifier ignores the condition setting.

Comparing Vendors' Bids (Standard View)

Once the bidding process ends (after the bid due date has passed), you can open a bid tabulation to compare the bids you received. A default bid tabulation sheet is available in Unifier, or your company may have a custom-designed bid tabulation sheet.

To compare bids

1) Open the Request for Bid (RFB) record.
2) Click on the **Proposal Management** tab to view the bids you received. Once the bid is closed, upon selecting the bid, you can only view the information of the invitation that was sent, along with the bids that have been received.
3) From the list, select the vendors you want to compare and click **Compare**. The Bids Comparison window opens, showing the bids you selected. In the toolbar, check **Star Vendors Only** to view the data of only shortlisted vendors. To compare the line item total with reference to the selected proposal, select a proposal from the **Compare with** dropdown list. The dropdown list includes all proposals selected for comparison.
4) Click **Save** or **Cancel** after making any edits.

Record Details tab

By default, the Bids Comparison sheet opens in the **Record Details** tab where you can view requestor estimates and bid proposals in a multiform view.

Reorder bids by hovering the top of the bids and dragging them to the desired position.

Hover the top of a bid to view a dropdown menu in which you can:

- **Send Email**
- **Open Vendor Details**
- **Open Proposal**

Line Items tab

To view the bid comparison in a grouped grid view, navigate to the **Line Items** tab.

The grid contains a **Short Description** column, a **Requestor Estimates Column**, and **Vendor Column Groups**.

The **Requestor Estimates Column** contains data elements selected for comparison in uDesigner for the detail form. This column is fixed and cannot be sorted.

The **Short Description** column lists all lines entered by the requestor and additional lines entered by each vendor. Additional lines display 0.00 for vendors who have not quoted.

Each **Vendor Column Group** contains all data elements that have been included for comparison from the detail form. The lowest amount per line item among all visible vendors in the grid displays in green. The highest amount per line item among all visible vendors in the grid displays in red.

Opened or Viewed Bid Invitation

The requester has access to the details of a bid status after the invitation is sent out.

- The status of each bid could change with respect to actions performed by the bidder.
- The status of some bids would freeze once the RFB is beyond its due date.

To enable the requester to see the status of a bid before the due date and to help the requester understand how many bid responses can be expected against the invites sent, the requester can track whether a bidder has opened or viewed the bid invitation, or not. In addition, the requester can identify which bidder has declined a bid, withdrew from a bid (Unifier resets the submitted bid in this case), or submitted a bid.

To view status of the bid before the bid closure or before the bid due date

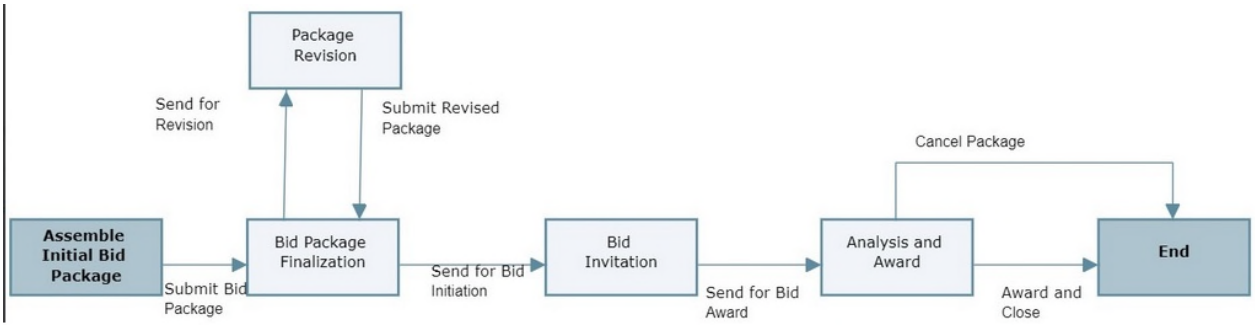
In the invite form, the "**Proposal**" column displays the status values, as follows:

Status	Description
Not Responded	To indicate that the bid invitation has been sent, but the bidder has not yet opened the invite, or viewed the invite.
Viewed	To indicate that the bidder has opened and viewed the bid invitation, but the bidder has not clicked "Accept" or "Decline." Also when the bidder undoes the action of decline or accept the status would be changed to viewed from decline or In progress respectively.
Declined	To indicate that bidder has declined the bid invitation. The bidder has opened the invitation and clicked "Decline."
Submitted	To indicate that bidder has submitted the response for the bid. Even after the bidder withdraws a bid and resubmits, the status would reflect "Submitted."
Withdrawn	To indicate that bidder has withdrawn their submission by clicking "Withdraw Submission" option in the bidder portal.

Status	Description
Not Invited	To indicate that the bidder is added; however, the invitation has not been sent to the bidder, yet.
Accepted	To indicate that the bidder has viewed the bid and accepted the bid (clicked "Accept") but has not submitted the response.
Awarded	Once the bid is awarded to any particular bidder, the status of the record will be updated as "Awarded." This will help requester understand how many bids can be expected for the number of invites sent across.

When a bidder has viewed the invitation, and the requestor clicks the "business process records" link, the BP record opens in preview mode.

Sample Workflow



Contracts Business Process

Prerequisite

You must have budget assigned to a CBS/Cost Code in the project's cost sheet prior to creating a Contracts record line item. Use the **Initial Budget** (Owner Template), or the **Budget Items** (Contractor Template) business process record to allocate budget to the code.

Purpose

The Contracts business process is used in procurement workflows. You can use a Contracts record to gather key contractual information, such as vendor and type of contract. You can use a Contracts business process record to approve or deny approval for a commitment.

Business process characteristics

The Contracts business process is a cost-type business process that includes a workflow and requires you to select a Vendor. In turn, Change Orders and Payment Applications require you to select a Contract. You can create more than one Contracts record in a project. The item logs section of the Contracts record displays four query tabs, Summary Items, Approved Change Orders, Pending Change Orders, Payment Application logs, and Submittals. If the Contracts record is auto created by the Requests for Bid business process, then the upper form and tabs are auto populated with the vendor and award details from the winning bid. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status Rejected, a terminal status
- Canceled, a terminal status

Groups associated with this business process

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.

Relationships associated with this business process

The record creator must select a vendor.

Additional Information

- The Contracts business process uses the Contracts-SOV, which becomes available on the End step.
- Enabled for smart phones and other hand held devices.
- Enabled for integration.
- Enabled for publish path.

Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

- Enabled for custom print.

Print using a custom layout

Custom printing can be used with templates created in Microsoft Word and PDF format. Depending on the template used for custom print, you can print the upper form, the current workflow step, comments and attachments of the record. The template may also allow printing of specific line items in their tabs. The printed output will list the name of the table with the line items following on separate lines.

Note: In Unifier 9.14 release, a specific Custom Print template has been added to the Contracts Business Process.

To print a business process form with a custom print layout, do the following:

1. Open the business record that you want to print.
2. From the File menu, select **Print Preview** > **Custom**.
3. Click **Save**.

Note: When opening a business process form that includes fields that are auto-populated, or automatically updated, the system considers these automatic updates as changes and requires that you Save the work.

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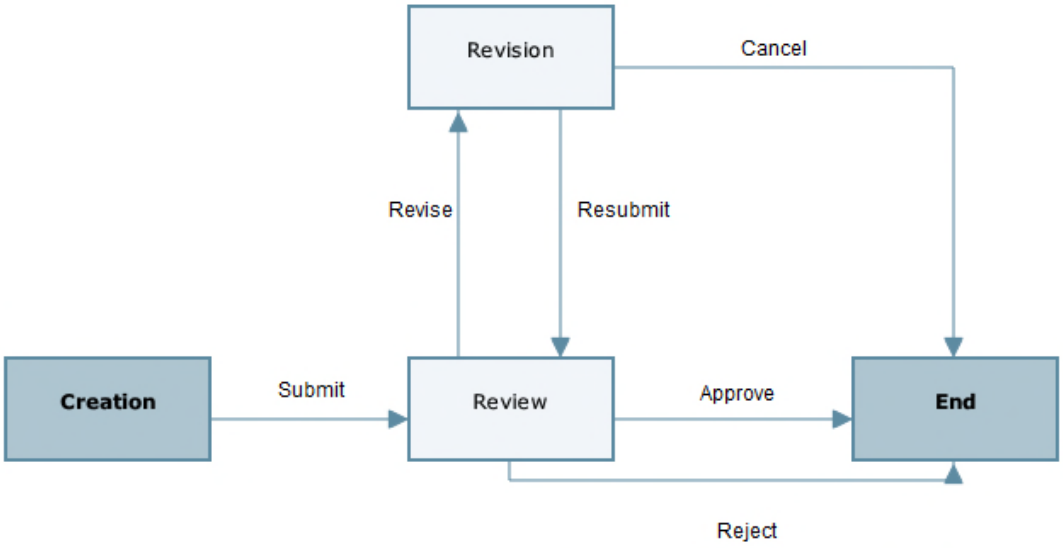
Contracts Workflow

Below are the four steps of the Contracts workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel Contract" then the record moves to the **End** step with a record status of "Canceled." For all steps, except the **End** step, sending a record to the next step creates a task for the assignee.



Creating a Contracts Record

The first step in the Contracts business process workflow is the Creation step.

To create a new Contracts record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.
3) Select **Contracts**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in the **Drafts** folder.
5) In the **Line Items** section, click **Add** and select **Lump Sum** or **Unit Cost** to select the type of cost item. You can also click the **Grid** button to enter multiple line items. The Line Items form opens.
6) Complete the Line Items form according to the Line Items table below. You must complete all required fields on each line that you entered before you can save the Line Items form.
7) Click **Add Cost**.
8) Select a cost code to associate with this cost item and click the **Select** button. You can distribute the total amount across multiple cost codes. Click the **Add Remaining** button to add the remaining amount to a cost code.
9) Enter a short description for this line item.
10) Enter the item quantity and item unit cost.

11) Click **Save** the Line Items form closes.

    If you do not click **Save** before closing the form, you will lose your line item changes.

    The system automatically calculates the aggregate value of the line items and displays the amount in the **Amount** field and in the Line Items section **Total Amount** field.

12) Repeat steps 6 to 12 to add more line items.

13) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.

14) In **Action Details**, select who should receive the record.

    a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.

    b. Select the user or group who will receive the task on the Approval step.

    c. Click **Add**.

    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.

    e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.

15) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step..
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	You can select the currency for the transaction if it is different from the project currency. The transaction currency must be active in the project.
Rate in Project Currency	Unifier auto-calculates this value and displays it on the next step after the task is accepted. Currency conversions use the exchange rate defined in the active Exchange Rates set in Unifier's Standards & Libraries. Until you modify a currency rate, Unifier uses the last active rate for that currency.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.

In this field	Do this
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items in transaction currency.
Project Currency Amount	This is an auto-calculated field that shows the total amount of the line items in project currency.
Contract Information block	
Contract No*	This is a required field - Enter the contract number.
Spec Section	Select a value from the field drop-down menu.
Contract Description	Enter a description for the contract.
Priority	Select the priority from the drop-down menu.
Work Retainage%	Enter the percentage that should be retained from contract payments.
Effective Date*	This is a required field - Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the business process allows changes, then you can change this date. If the record becomes late, Unifier displays the record Title in bold red.
Contract Type*	This is a require field - Select the contract type from the drop-down menu.
Contract Terms*	This is a required field - Enter the terms of the contract.
Expiry Date	Enter the day the contract expires *dd/mm/yyyy* or click the calendar icon to select the date.
Contract Summary block	
Original Contract Amount	The amount is auto-populated by the line items on this form.
Net Changes by Change Orders	This value comes from the project cost sheet.
Revised Contract Amount	This value comes from the project cost sheet.
Actuals to Date	This value comes from the project cost sheet.

In this field	Do this
Contract Balance	This value comes from the project cost sheet.
Vendor Information block	
Vendor*	This is a required field - Select a Vendor from the drop-down menu.
Vendor Name	This field is auto-populated from the Vendor record.
Address 1	This field is auto-populated from the Vendor record.
Address 2	This field is auto-populated from the Vendor record.
Address 3	This field is auto-populated from the Vendor record.
City	This field is auto-populated from the Vendor record.
State/Province	This field is auto-populated from the Vendor record.
Zip/Postal Code	This field is auto-populated from the Vendor record.
Country	This field is auto-populated from the Vendor record.
Primary Contact	This field is auto-populated from the Vendor record.
Email	This field is auto-populated from the Vendor record.
Phone	This field is auto-populated from the Vendor record.
Fax	This field is auto-populated from the Vendor record.
Minority-owned Business	This field is auto-populated from the Vendor record.
Woman-owned Business	This field is auto-populated from the Vendor record.
Disadvantage-owned Business	This field is auto-populated from the Vendor record.
P6 Activity	Select a P6 activity to associate with this record.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Item Logs

Summary Items Tab

In this field	Do this
Cost Line Item Type	This is auto-populated based on the Line Item Type you selected.

In this field	Do this
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Spend Category	Select a category from the drop-down menu.
Item Quantity*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the number of items specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Unit of Measure*	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the price of the item specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Amount	If the Cost Line Item Type is Lump Sum, then enter the total amount for this line item. This is a read-only field if the Cost Line Item Type is Unit Cost. It is auto-calculated using the formula Item Quantity Item Unit Cost.
Costed Quantity	This a read-only field.
Not costed Amount	This a read-only field.
Costed Amount	This a read-only field.
Not Costed Quantity	This a read-only field.
Description	Enter a short description of this line item.
P6 Activity	Select a P6 activity associated with this item.
P6 Planned Cost	This read-only field is based on the selected P6 activity.
P6 Planned Start	This read-only field is based on the selected P6 activity.
P6 Planned Finish	This read-only field is based on the selected P6 activity.

Approved Change Orders Tab

Use to create a new record as well as view, copy, or find existing approved change orders.

Pending Change Orders Tab

Use to create a new record as well as view, copy, or find existing pending change orders.

Payment Applications Log Tab

Use to create a new record as well as view, copy, or find existing records.

Submittals Tab

Use to create a new record as well as view, copy, or find existing records.

Routing a Contracts Record from the Review Step

To route a record from the Review step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the Contracts record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send.**

Routing a Contracts Record from the Revision Step

Upon sending the business process record forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.
5) In **Action Details**, select who should receive the task and who should receive a copy of the record in **Notifications**.
6) When ready, click **Send**.

Viewing a Contracts Record on the End Step

This is the last step in the workflow. You cannot take action on this step because the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a record on the End step

1) Navigate to the **All Projects** tab and select your project from the Projects log on the bottom of the All Projects landing page. Your project opens.
2) Navigate to **Cost Controls** > **Contracts**. The Contracts log opens.
3) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
4) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
5) Click **View Graphic** to see an image of the workflow.
6) Click SOV in the record toolbar to view the schedule of values for this record.

Notices to Proceed Business Process

Purpose

Notify a vendor/contractor on when work can begin on a project, site, or item.

Characteristics

This is a Project or Shell level business process with a workflow. You can view all Notices to Proceed records in the Notices to Proceed business process log.

Roles

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.
- Acknowledgment: Subcontractors. All Project Users can be copied.

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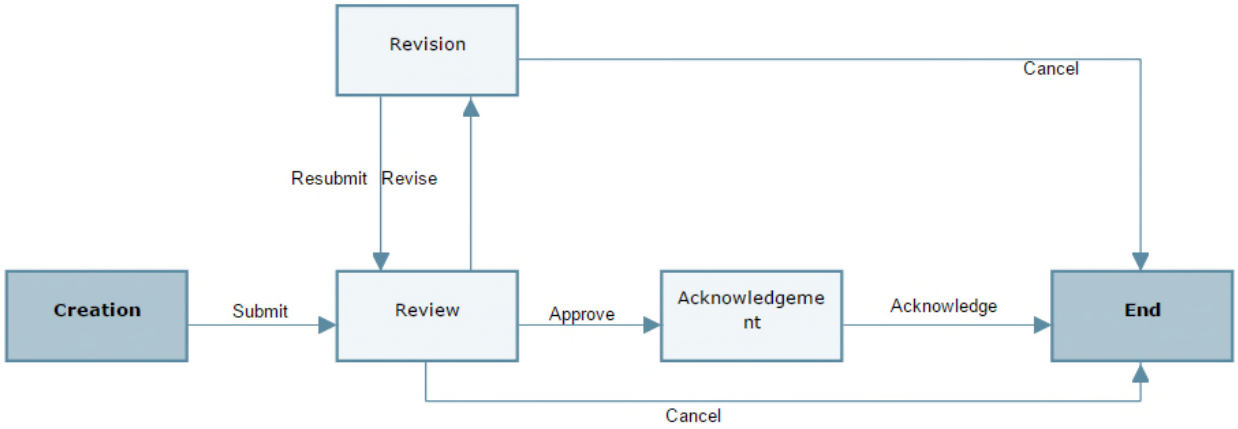
Notices to Proceed Business Process Workflow

The following diagram shows the four steps of the Notices to Proceed workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select Resubmit for Approval, the record moves to the Approval step with a record status of Pending. Sending a record to either the Revision step or the Approval step creates a task for the record recipient.



Creating Notices to Proceed Record

Create a Notices to Proceed record in the Tasks log to initiate and accept/reject a new Notices to Proceed approval request.

In the Notice to Proceed form, provide detailed information about the work that can begin and select the vendor and contract associated with the work. After completing the Notices to Proceed form, select an action in the Workflow Actions list to determine the next step in the workflow. Click Send to route the form to the next assignee.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.
3) Select **Notices to Proceed**.
4) From the BP log page, click **Create**.(Required) In the **Title** field, enter a title.
5) In the Contract field click **Select**, select a contract, and click **Open**. The **Contract Summary** section is auto-populated with the selected contract's information.
6) In the Vendor field click **Select**, select a vendor, and click **Open**.
7) In the **Description** field enter a description.
8) From the **Workflow Actions** list select **Submit**.
9) On the **Action Details** tab, click **To**, select and add an assignee, click **Add**, and click **OK**.
10) Click **Send** to route the record for approval and then click **OK**.

Revising Notices to Proceed Record

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and any task notes.
4) Click **Accept Task**.
5) In the **Description** field enter a description.

6) From the **Workflow Actions** list, select **Resubmit**.
7) On the **Action Details** tab, click **To**, select and add an assignee, click **Add**, and click **OK**.
8) Click **Send** to route the record for approval and then click **OK**.

Approving Notices to Proceed Record

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and any task notes.
4) View the record and click **Accept Task**.
5) From the **Workflow Actions** list select **Approve**.
6) Click **Send** to conclude the approval process.

Viewing Closed Notices to Proceed Record

You can view a closed **Notices to Proceed** record in the **Notices to Proceed** business process log.

When the record is at the **End** step, the record is in terminal status which means that the record has been: **Approved, Rejected,** or **Canceled**.

You can also open a closed **Notices to Proceed** record to see who has reviewed the record and at which step.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.
3) Click **Notices to Proceed**.
4) Select the appropriate line item (a closed Notices to Proceed record) from the list and open the record.
5) From the **Task Details**, click **Click here** to open the **BP Progress** window. The **BP Progress** window shows that the submittal is on the **End** step.

6) Click **View Graphic** to open the workflow graphic showing tasks steps and links. The current step (**End**) is highlighted.

Potential Change Orders Business Process (Owner Project)

Purpose

A contractor can use this business process to initiate a potential change order.

Business process characteristics

This is a project-level, cost-type business process with line items and workflow. It does not use an SOV. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status Rejected, a terminal status
- Canceled, a terminal status

Groups associated with this business process

- Creation: Subcontractors
- Review: Project Managers. All Project Users can be copied.
- Revision: Subcontractors. All Project Users can be copied.

Relationships associated with this business process

The record creator must select a vendor.

Additional Information

- Enabled for mobile devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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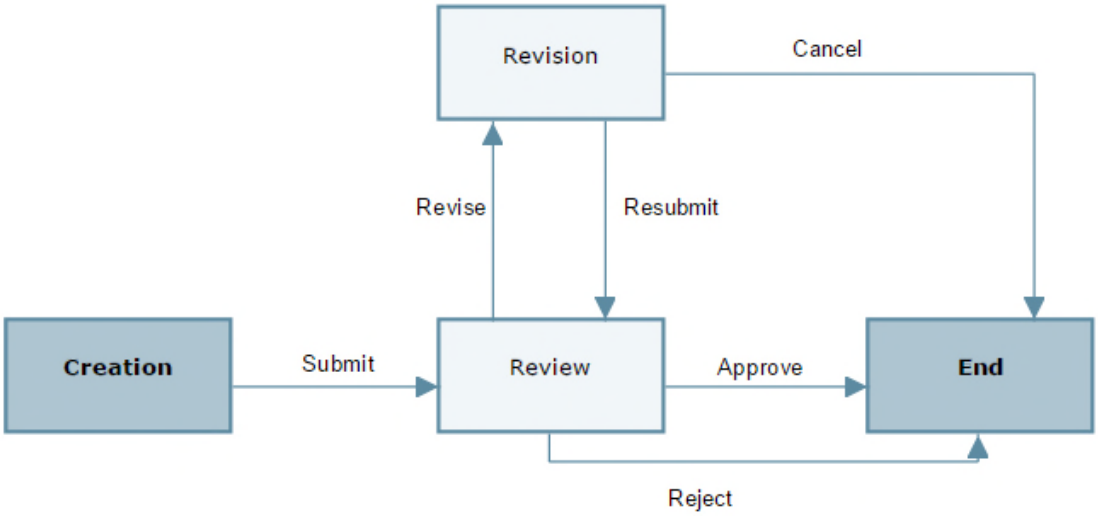
Potential Change Orders Workflow

Below are the four steps of the Potential Change Orders workflow.



Creating a Potential Change Orders Record

The first step in the Potential Change Order business process workflow is the Creation step.

To create a new Potential Change Orders record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.
3) Select **Potential Change Orders**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in the **Drafts** folder.
5) In the **Line Items** section, click **Add** or **Grid**. The Line Items List opens.

6) Complete the Line Items list according to the Line Items table below. You must complete all required fields before you can save the Line Items form.
7) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task on the Approval step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
10) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	You can select the currency for the transaction if it is different from the project currency. The transaction currency must be active in the project.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Contract Reference	Select a contract that this change order affects.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.

In this field	Do this
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Project Currency Amount	This is an auto-calculated field that shows the total amount of the line items in project currency.
Potential CO Information block	
Spec Section	Select a value from the field drop-down menu.
Description	Enter a description for the potential change order.
Current Contract Completion Date*	This is a required field - Either enter a date (dd/mm/yyyy) or use the calendar icon to select a date.
Schedule Impact (Days)*	This is a required field - Enter the number of days this potential change order could affect the schedule.
Priority	Select the priority from the drop-down menu.
Required Date	Either enter a date (dd/mm/yyyy) or use the calendar icon to select a date.
Revised Contract Completion Date	This field is auto-calculated based on the current contract completion date + the schedule impact days.
Scope of Change block	
Reason*	This is a required field - Select a reason for the change from the drop-down menu.
Change Reason*	This is a required field - Enter a detailed reason, up to 4000 characters, for the potential change order.
Scope of Work*	This is a required field - Enter a detailed scope of work, up to 4000 characters, for the potential change order.
Vendor Information block	
Vendor*	This is a required field - Select a Vendor from the drop-down menu.
Vendor Name	This field is auto-populated from the Vendor record.
Primary Contact	This field is auto-populated from the Vendor record.
Email	This field is auto-populated from the Vendor record.
Phone	This field is auto-populated from the Vendor record.
P6 Activity	Select a P6 activity to associate with this record.
P6 Planned Cost	This is a read-only field.

In this field	Do this
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Item Logs

Line Items Tab

In this field	Do this
General Block	
Cost Code*	This is a required field -Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This read-only field is auto-populated from the cost code name.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Description	This is not a required field - Enter a description for the line item.
Spend Category block	
Spend Category	Select the category from the drop-down menu.
Work Package	You can select a Work Package.
Item Quantity*	This is a required field - Enter the number of items specified on the line item
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field - Enter the price of the item specified on the line item
Amount	This read-only field is auto-calculated using the formula Item Quantity X Item Unit Cost.

Routing a Potential Change Orders Record from the Review Step

To route a Potential Change Orders record from the Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.

3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the **Potential Change Orders** record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.

   The Action Details section changes according to the workflow action selection.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing a Potential Change Orders Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Revision step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

- Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the *General* block, you can revise the record **Title**.
- In the *Potential CO Information* block, most fields are editable except Revised Contract Completion Date, which is auto-calculated based on the number of days of the schedule impact.
- In the *Scope of Change* block, you can change the vendor selection.
- In **Line Items** you can modify any existing line items, add additional line items, or remove them. Follow the same directions as adding line items during record creation.

4) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form.
5) Click **OK** to save the Line Items.
6) When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.

   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.

   - **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.

7) In **Action Details**, select who should receive the task and who should receive a copy of the record in **Notifications**.
8) When ready, click **Send**.

Viewing a Potential Change Orders Record on the End Step

This is the last step in the workflow. You cannot take action on this step because the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a record on the End step:

1) Go to your project, ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.

3) Select **Potential Change Orders**.
4) Double-click a record to open it. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.

Payment Applications Business Process

Purpose

The Payment Applications business process is used in procurement processes to request payment on Total Commitments (approved Contract, budget, and Change Orders). Each Payment Applications record:

- References a specific Contracts record
- Displays a ledger of that contract's payment and retainage information
- Updates that contract's schedule of values

Business process characteristics

This is a cost-type business process that includes an approval workflow. Approved data from this business process rolls up to the project cost sheet and updates the schedule of values. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status Rejected, a terminal status.
- Canceled, a terminal status.

Groups associated with this business process:

- Creation: Subcontractors
- Review: Project Managers. All Project Users can be copied.
- Revision: Subcontractors. All Project Users can be copied.

Relationships associated with this business process

The record creator must associate it with a contract.

Additional Information

- The Payment Application schedule of values is available after association with a contract.
- The Payment Application business process shows an abridged cost sheet on the Upper form.
- Cost Rules: A budget line item cannot be reduced below $0.
- Step completion policy and resolving actions can differ between steps.
- The Payment Application business process is enabled for smart phones and other hand held devices.
- The Payment Application business process is enabled for custom print.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

- Enabled for custom print.

Print using a custom layout

Custom printing can be used with templates created in Microsoft Word and PDF format. Depending on the template used for custom print, you can print the upper form, the current workflow step, comments and attachments of the record. The template may also allow printing of specific line items in their tabs. The printed output will list the name of the table with the line items following on separate lines.

Note: In Unifier 9.14 release, a specific Custom Print template has been added to the Payment Applications Business Process.

To print a business process form with a custom print layout, do the following:

1. Open the business record that you want to print.
2. From the File menu, select **Print Preview** > **Custom**.
3. Click **Save**.

Note: When opening a business Process form that includes fields that are auto-populated, or automatically updated, the system considers these automatic updates as changes and requires that you Save the work.

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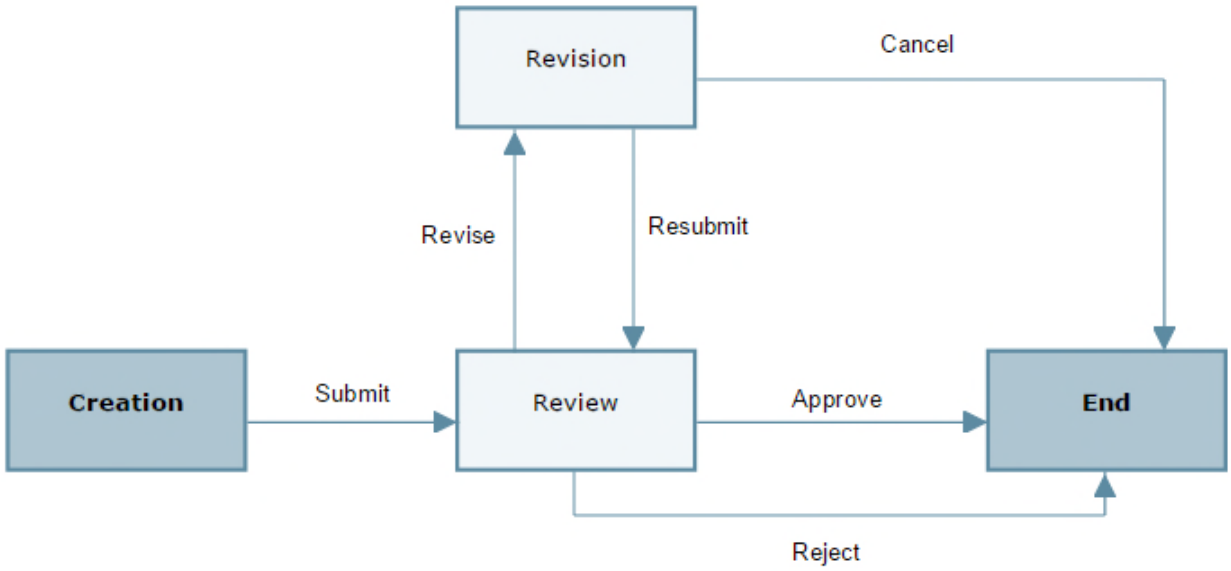
Payment Applications Workflow

Below are the four steps of the Payment Applications workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel Pay App" then the record moves to the End step with a record status of "Canceled." For all steps, except the End step, sending a record to the next step creates a task for the assignee.



Creating a Payment Applications Record

The first step in the Payment Applications business process workflow is the Creation step.

To create a new Payment Applications record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitments** node.
3) Select **Payment Applications**.
4) From the BP log page, click **Create**.In the **Line Items** section either click **Add** or **Grid**. The Line Items List opens.
5) Complete the Line Items list according to the Line Items table below. You must complete all required fields before you can save the Line Items form.
6) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.
   - If you are using the grid and do not click Save before closing it, you will lose your line item changes.
   - The SOV structure is derived from the Payment Applications detail form.

7) Complete the Line Items form according to the Line Items table below. You must complete all required fields before you can save the Line Items Grid.
8) Click **OK** to save the Line Items.
9) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
10) In **Action Details**, select who should receive the record.
    a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
    b. Select the user or group who will receive the task on the **Approval** step.
    c. Click **Add**.
    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
    e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
11) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
Record Number	This is a read-only field that Unifier populates when you click Send.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	This field is auto-populated from the contract.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date shows when the record is due, based on the business process setup. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Contract/PO*	This is a required field - Select the reference contract. This selection drives contract-related field values.

In this field	Do this
Contract No	This field is auto-populated from the contract.
Contract Type	This field is auto-populated from the contract.
Priority	This field is auto-populated from the contract.
Vendor ID	This field is auto-populated from the contract.
Contract Title	This field is auto-populated from the contract.
Contract Date	This field is auto-populated from the contract.
Vendor Name	This field is auto-populated from the Vendor record.
Vendor Pay App No.*	This is a required field - Enter the vendor payment application number.
Invoice Date*	This is a required field - Use the calendar icon to select the date of the invoice.
Payment Due Date*	This is a required field - Use the calendar icon to select the date of the invoice.
Work Retainage %	Enter the amount to retain from each payment. The Payment Applications SOV tracks retainage.
Check No	This field is read only until the record reaches the End step, where you can manually enter the check number.
Check Processed Date	This field is read only until the record reaches the End step, where you can manually enter the check processed date.
Check Date	This field is read only until the record reaches the End step, where you can manually enter the check date.
Original Contract Amount	Unifier auto-populates this value based on the contract selection.
Net Changes by Change Orders	Unifier auto-populates this value based on net changes to change order amounts (additions and reductions).
Revised Contract Amount	Unifier auto-populates this value based on the formula: Original Contract Amount + Net Changes by Change Orders
Total Work Completed	Unifier auto-populates this amount based on the sum of line item entries from this business process.
Total Retainage	Unifier auto-populates this amount based on the sum of line item entries from this business process.
Total Earned Less Retainage	Unifier auto-populates this amount based on the sum of line item entries from this business process.
Total Previous Payments	Unifier auto-populates this amount based on the sum of line item entries from this business process.

In this field	Do this
Current Payment Due	Unifier auto-populates this value based on the line item amount, less retainage.
Balance to Finish Plus Retainage	Unifier auto-populates this amount based on the sum of line item entries from this business process.
Add Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
Previous Add Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
This Period Add Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
Deduct Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
Previous Deduct Change Orders	Unifier calculates the value of this field based on a query defined in Configuration.
This Period Deduct Change Orders	This is a read-only field. The value is calculated using the formula: Deduct Change Orders<uconApvdDeductChgQE> - Previous Deduct Change Orders<uconPrvApvdDeductChgQE>

Item Logs

Line Items Tab

In this field	Do this
General block	
Cost Code*	This is a required field -Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	The code name is auto-populated from the cost code.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Description	This is not a required field - Enter a description for the line item.
Commit Short Description	Enter a short description for the commitment.
Work Package	You can select a Work Package.
Payment Application block	

In this field	Do this
Scheduled Value	Unifier calculates the schedule value based on the formula (approved contract + approved change orders) for that contract.
Previous Work Completed	Unifier carries forward the value from previous Payment Applications records.
Work Completed (This Period)	Enter a value for the amount of work completed, (based on a portion, or all, of Item Quantity).
Total Work Completed	Unifier calculates this value based on the formula (Previous Work Completed + Work Completed (This Period))
Percent Complete	Unifier calculates this value based on the formula (Total Work Completed / Scheduled Value)*100
Balance To Finish	Unifier calculates this value based on the formula (Scheduled Value - Total Work Completed)
Previous Retainage	Unifier carries forward the value from previous Payment Applications records.
Work Retainage%	Unifier auto-populates this field from the Upper form of this record.
Retainage (This Period)	Unifier calculates the period retainage value based on the formula ((Work Completed (This Period) * Work Retainage%)/100)
Retainage Released	Enter a value for the amount of retainage paid on this cost code.
Total Retainage	Unifier calculates the total retainage value based on the formula (Previous Retainage + Retainage (This Period) - Retainage Released)
Total Earned Less Retainage	Unifier calculates the total earned less retainage value based on the formula (Total Work Completed - Total Retainage)
Total Previous Payments	Unifier auto-populates this value from the upper form of this record.
Current Payment Due	Unifier calculates the currently due payment based on the formula (Total Earned Less Retainage - Total Previous Payments)
Balance to Finish plus Retainage	Unifier calculates the balance-to-finish-plus-retainage value based on the formula (Scheduled Value - Total Earned Less Retainage)
Total Payments	Unifier calculates the total payments value based on the formula (Total Previous Payments + Current Payment Due)

Routing a Payment Applications Record from the Review Step

To route a record from the Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the Payment Applications record and determine the appropriate course of action.
5) In the toolbar at the top right of the form, click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing a Payment Applications Record from the Revision Step

Upon sending the business process form forward to the Revision step, Unifier sends a task to the record creator and a message to those selected in the Cc field. You can see your active tasks in your Tasks log.

To route a record from the Revision step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the Upper form section you can change the following record details.
   - In the *General* block, you can revise the record **Title**.
   - In the *Contract Information block*, fields are read only.
   - In the *Vendor Information block*, all fields are read-only and come from the vendor selected on the contract.
   - In the *Payment Application block*, you can edit **Vendor Pay App No**, **Invoice Date**, **Payment Due Date**, and **Retainage %**.

   a. In the **Line Items** section you can modify or delete line items. Changes to line items dynamically update fields in the Upper form's *Payment Application block* and the Payment Applications SOV.
4) When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.

   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Cancel** — This action sends the record to the **End** step in Canceled status. The To and Cc field are unavailable.
5) In **Action Details**, depending upon the workflow action selection, select who should receive the task and who should be copied on the action.
6) When ready, click **Send**.

Viewing a Payment Applications Record on the End Step

This is the last step in the workflow. Once on the End step the record is viewable only in the business process log.

To view a record on the End step:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.
3) Select **Notices to Proceed**.
4) Open the record. From the End step you can:
   a. Enter the **Check No.**
   b. Select the **Check Processed Date** using the calendar icon or manually in dd/mm/yyyy format.
   c. Select the **Check Dat**e using the calendar icon or manually in dd/mm/yyyy format.
   d. Click **Save** to retain changes.
5) In Task Details you can see the record status and the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.
8) Click **SOV** to see the schedule of values.

Work Releases Business Process

Purpose

This business process references the company-level Blanket Purchase Order business process.

Business process characteristics

This is a project-level, Cost-type business process with line items and workflow. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status Rejected, a terminal status
- Canceled, a terminal status

Groups associated with this business process

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.

Additional Information

- Step completion policy and resolving actions can differ between steps.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

  To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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Work Releases Business Process Workflow

Below are the four steps of the Work Releases business process workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel Work Authorization" then the record moves to the **End** step with a record status of "Canceled." For all steps, except the **End** step, sending a record to the next step creates a task for the assignee.

Creating a Work Releases Record

Follow these steps to create a Work Releases business process. Members of the **Creator** group can create this business process.

To create a new Work Releases record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.
3) Select **Work Releases**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in the **Drafts** folder.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
6) Complete the Line Items form according to the Line Items table below. You must complete all required fields before you can save the Line Items form.
7) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task on the Approval step.
   c. Click **Add**.

d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.

10) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Reference BPO*	This is a required field - Select the Blanket Purchase Order against which this Work Releases record will reference.
Spec Section	Select a Spec Section from the drop down menu.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items in transaction currency.
Contract Type	This is a required field - Enter the contract number.
Vendor Details block	
Vendor ID	This field is auto-populated from the reference BPO selection.
Vendor Name	This field is auto-populated from the reference BPO selection.

In this field	Do this
Address 1	This field is auto-populated from the reference BPO selection.
Address 2	This field is auto-populated from the reference BPO selection.
Address 3	This field is auto-populated from the reference BPO selection.
City	This field is auto-populated from the reference BPO selection.
State/Province	This field is auto-populated from the reference BPO selection.
Zip/Postal Code	This field is auto-populated from the reference BPO selection.
Country	This field is auto-populated from the reference BPO selection.
Primary Contact	This field is auto-populated from the reference BPO selection.
Email	This field is auto-populated from the reference BPO selection.
Phone	This field is auto-populated from the reference BPO selection.
Fax	This field is auto-populated from the reference BPO selection.
Description	Enter a description for the Work Releases record.

Routing a Work Releases Record from the Review Step

To route a Work Releases record from the Review step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the Contracts record and determine the appropriate course of action.
5) In the toolbar at the top right of the form, click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.

   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send.**

Routing a Work Releases Record from the Revision Step

Upon sending the business process record forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.
5) In **Action Details**, select who should receive the task and who should receive a copy of the record in **Notifications**.
6) When ready, click **Send**.

Viewing a Work Releases Record on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

- ***To view a Work Releases record on the End step***

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Commitment** node.
3) Select **Work Releases**. The Work Releases log opens.
4) Open the record. In the business process record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.

Purchase Orders

Purchase Orders Business Process

Prerequisite

You must have budget assigned to a CBS/Cost Code in the project's cost sheet prior to creating a Purchase Orders record. Use the **Initial Budget** business process record to allocate budget to the code.

Purpose

The Purchase Orders business process is used for commitments in procurement workflows. It uses a General Spends schedule of values (SOV) that does not track retention, whereas the Contracts business process uses a Payment Applications SOV that does track retention. You can use a Purchase Orders business process record to approve or deny approval for a commitment.

Business process characteristics

The Purchase Orders business process is a cost-type business process that includes a workflow and requires you to select a Vendor. In turn, PO Amendments, Invoices and Payments require Purchase Order selection. You can create more than one Purchase Order record in a project. The item logs section of the Purchase Orders record displays two query tabs, Amendments and Invoices. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status Rejected, a terminal status.
- Canceled, a terminal status.

Groups associated with this business process

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.

Relationships associated with this business process

The record creator must select a vendor, PO Amendments and Invoices must pick a Purchase Order record.

Additional Information

- The Purchase Orders business process uses the General Spends schedule of values; the SOV becomes available on the end step.
- Enabled for smart phones and other hand held devices.
- Enabled for integration.
- Enabled for publish path.

Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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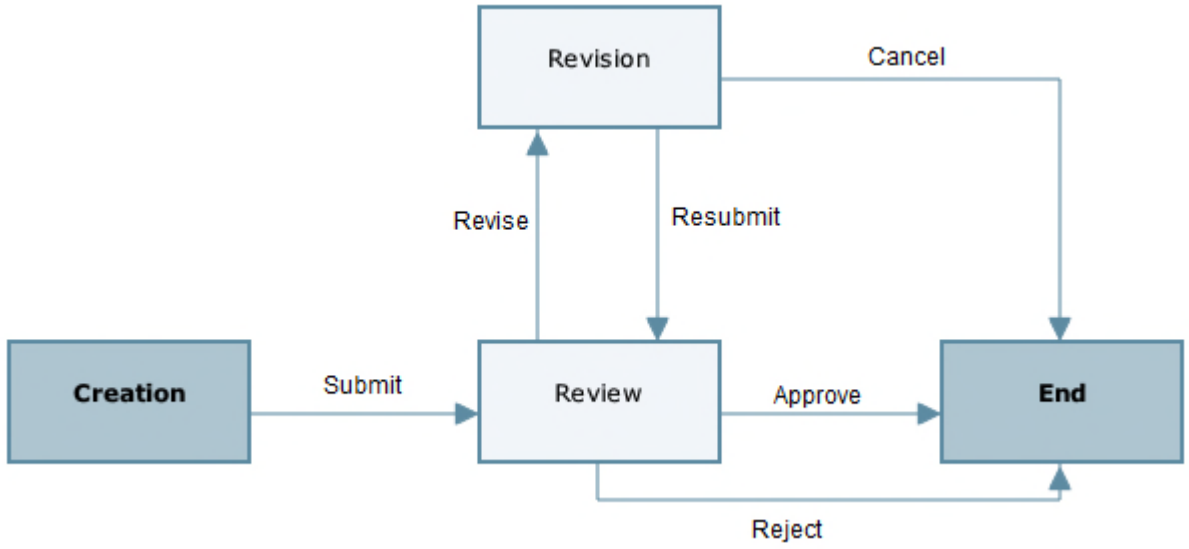
Purchase Orders Workflow

Below are the four steps of the Purchase Orders workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel PO" then the record moves to the **End** step with a record status of "Canceled." For all steps, except the **End** step, sending a record to the next step creates a task for the assignee.



Creating a Purchase Orders Record

The first step in the Purchase Orders business process workflow is the Creation step. Members of the **Creator** group can create this business process.

To create a new Contracts record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Purchase Orders** node.
3) Select **Purchase Orders**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in your the **Drafts** folder.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items List opens.
6) Complete the Line Items list according to the Line Items table below. You must complete all required fields before you can save the Line Items form.
7) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task on the Approval step.
   c. Click **Add**.

d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.

10) Click **Send** to route the record to the Review step.

Upper Form

In this field	**Do this**
General block	
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	You can select the currency for the transaction if it is different from the project currency. The transaction currency must be active in the project.
Rate in Project Currency	Unifier auto-calculates this value and displays it on the next step after you accept the task. Currency conversions use the exchange rate defined in the active Exchange Rates set in Unifier's Standards & Libraries. Until you modify a currency rate, Unifier uses the last active rate for that currency.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date is pre-populated from the workflow setup and reflects the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items in transaction currency.

In this field	**Do this**
Project Currency Amount	This is an auto-calculated field that shows the total amount of the line items in project currency. You will see this value on the next step.
PO Information block	
PO Number	Enter the purchase order number.
Spec Section	Select a value from the field drop-down menu.
Contract Description	Enter a description for the contract.
count	This value is based on a query.
Effective Date	Enter the date on which the contract becomes effective.
Expiration Date	Enter the day the contract expires *dd/mm/yyyy* or click the calendar icon to select the date.
Vendor Information block	
Vendor*	This is a required field - Select a Vendor from the drop-down menu.
Vendor Name	This field is auto-populated from the Vendor record.
Address 1	This field is auto-populated from the Vendor record.
Address 2	This field is auto-populated from the Vendor record.
Address 3	This field is auto-populated from the Vendor record.
City	This field is auto-populated from the Vendor record.
State/Province	This field is auto-populated from the Vendor record.
Zip/Postal Code	This field is auto-populated from the Vendor record.
Country	This field is auto-populated from the Vendor record.
Primary Contact	This field is auto-populated from the Vendor record.
Email	This field is auto-populated from the Vendor record.
Phone	This field is auto-populated from the Vendor record.
Fax	This field is auto-populated from the Vendor record.
P6 Activity	Select a P6 activity to associate with this record.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Item Logs

Line Items Tab

In this field	Do this
General Block	
Cost Code*	This is a required field - Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This read-only field is auto-populated from the cost code name.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Description	This is not a required field - Enter a description for the line item.
Spend Category block	
Spend Category	Select the category from the drop-down menu.
Work Package	You can select a Work Package.
Item Quantity*	This is a required field - Enter the number of items specified on the line item
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field - Enter the price of the item specified on the line item
Amount	This read-only field is auto-calculated using the formula Item Quantity X Item Unit Cost.

Amendments Tab

Use to create a new record as well as view, copy, or find existing records.

Invoices Tab

Use to create a new record as well as view, copy, or find existing records.

Routing a Purchase Orders Record from the Review Step

To route a record from the Review step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the Purchase Orders record and determine the appropriate course of action.
5) In the toolbar, click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.

   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing a Purchase Orders Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the Upper form you can:
   - Change the record **Title** in the *General* block
   - Edit any field in the *Contract Information* block
   - Change the vendor selection in the *Contract Summary* block

   In **Line Items** you can:
   - Modify any existing line items
   - Add additional line items
   - Remove Line Items.

   Follow the same directions as adding line items during record creation, then click **OK** to save any line item changes.
5) When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.

   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.

   - **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.
6) In **Action Details**, depending upon the workflow action selection, select who should receive the task and who should be copied on the action.
7) When ready, click **Send**.

Viewing a Purchase Orders Record on the End Step

This is the last step in the workflow. You cannot take action on this step. Once on the **End** step the record is viewable only in the business process log.

To view a record on the End step

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Purchase Orders** node.
3) Select **Purchase Orders**. The Purchase Orders log opens.
4) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."

5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.
7) Click **SOV** to see the schedule of values.

PO Amendments Business Process

Purpose

You can use the PO Amendments business process to make a formal commitment change to a Purchase Order. You can see the change impact in the project's cost sheet.

Business process characteristics

This is a project-level, Cost-type business process with line items and workflow. The PO Amendments business process uses the General Spends schedule of values. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status Rejected, a terminal status.
- Canceled, a terminal status.

Groups associated with this business process

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.

Relationships associated with this business process

- The Creator must select a Purchase Order.
- The business process auto-populates vendor information from the contract vendor selection.

Additional Information

- The General Spends SOV becomes available upon association with a Purchase Orders record during record creation.
- Enabled for mobile devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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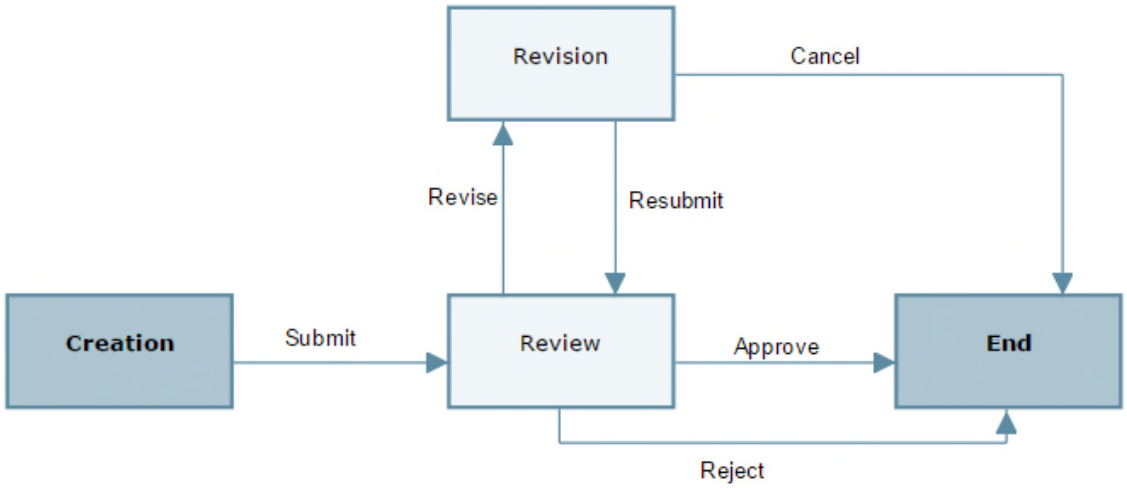
PO Amendments Workflow

Below are the four steps of the PO Amendments workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel PO Amendment" then the record moves to the End step with a record status of "Canceled." For all steps, except the End step, sending a record to the next step creates a task for the assignee.



Creating a PO Amendments Record

The first step in the PO Amendments business process workflow is the Creation step.

To create a PO Amendments record

1) Go to your project. Ensure that you are in the User mode.

2) Expand the **Financial Transactions** node and expand the **Purchase Orders** node.
3) Select **PO Amendments**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in the **Drafts** folder.
5) In the **Line Items** section either click **Add** or **Grid**. The Line Items form or grid opens.
6) Enter Line Items according to the Line Items table below. You must complete all required fields before you can save the Line Items form.
7) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task on the Approval step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
10) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Title*	This is a required field - Enter a title for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	This is a read-only field that is auto-populated when you select the contract.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.

In this field	Do this
Due Date	The Due Date is pre-populated from the workflow setup and reflects the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Contract/PO	
PO Number	This field is auto-populated from the selected Purchase Order record.
PO Title	This field is auto-populated from the selected Purchase Order record.
Vendor ID	This field is auto-populated from the Vendor record associated with the selected Purchase Order record.
Vendor Name	This field is auto-populated from the Vendor record associated with the selected Purchase Order record.
P6 Activity	Select a P6 activity to associate with this record.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Item Logs

Line Items Tab

In this field	Do this
General Block	
Reference	This is not a required field, but a helpful one. You can select a Purchase Order line item that you want to amend and the cost code information will populate the Cost Code field, the Code Name field, and the Short Description field.
Cost Code*	This is a required field - Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This read-only field is auto-populated from the cost code name.

In this field	Do this
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Description	You can enter a description for the line item.
Spend Category block	
Spend Category	Select the category from the drop-down menu.
Work Package	You can select a Work Package.
Item Quantity*	This is a required field - Enter the number of items specified on the line item
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field - Enter the price of the item specified on the line item
Amount	This read-only field is auto-calculated using the formula (Item Quantity X Item Unit Cost).

Routing a PO Amendment Record from the Review Step

To route a record from the Review step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the PO Amendment record and determine the appropriate course of action.
5) In the toolbar at the top right of the form, click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.

- **Revise** — this action keeps the workflow in flight and in **Pending** status.

a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
b. Click **Cc...** Select the user or group who will receive the record on the next step.
c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.

- **Reject** — this selection will send the record to the End step in **Rejected** status.

6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing a PO Amendment Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.

   The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the Upper form you can change the record **Title** in the *General* block.

   In **Line Items** you can:

   - Modify any existing line items
   - Add additional line items

- Remove Line Items.

Follow the same directions as adding line items during record creation, then click **OK** to save any line item changes.

4) When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.
5) In **Action Details**, depending upon the workflow action selection, select who should receive the task and who should be copied on the action.
6) When ready, click **Send**.

Viewing a PO Amendment Record on the End Step

This is the last step in the workflow. You cannot take action on this step because the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a record on the End step

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Purchase Orders** node.
3) Select **PO Amendment**.
4) In the Tasks toolbar click **New** The PO Amendments log opens.
5) Open the record.. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.
8) Click **SOV** to see the schedule of values.

Invoices Business Process

Purpose

The Invoices business process is used in procurement processes to request payment on Total Commitments (Purchase Orders + PO Amendments). Each Invoices record:

- References a specific Purchase Orders record
- Updates that Purchase Order's General Spends schedule of values (SOV)

Business process characteristics

The Invoices business process is a cost-type business process that includes an approval workflow. Approved data from this business process rolls up to the project cost sheet, updates the schedule of values, and triggers funding consumption. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status Rejected, a terminal status.
- Canceled, a terminal status.

Groups associated with this business process:

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.

Relationships associated with this business process

The record creator must associate it with a contract.

Additional Information

- The General Spends SOV becomes available after association with a contract.
- Enabled for smart phones and other hand held devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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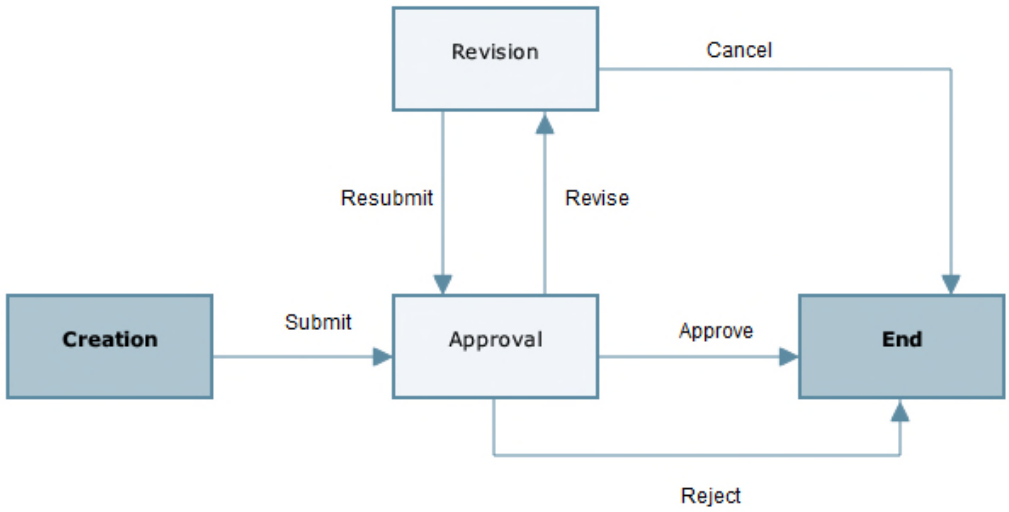
Invoices Workflow

Below are the four steps of the Invoices workflow. The workflow action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel Invoice" then the record moves to the End step with a record status of "Canceled." For all steps, except the End step, sending a record to the next step creates a task for the assignee.



Creating an Invoices Record

The first step in the Invoices business process workflow is the Creation step. Members of the **Creator** group can create this business process.

To create a new Invoices record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Purchase Orders** node.
3) Select **Invoices**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in your **Drafts** folder.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
6) Complete the Line Items form according to the Line Items table below. You must complete all required fields before you can save the Line Items form.

   Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.
7) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
8) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task on the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
9) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you click Send.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	This field is auto-populated from the contract.

In this field	Do this
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date shows when the record is due, based on the business process setup. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Contract/PO*	This is a required field - Select the reference purchase order. Click Select. The Purchase Orders log opens. Pick a Purchase Order from the log and click Open.
PO Number	This field is auto-populated from the Purchase Order.
PO Title	This field is auto-populated from the Purchase Order.
PO Date	This field is auto-populated from the Purchase Order
Vendor ID	This field is auto-populated from the Purchase Order.
Vendor Name	This field is auto-populated from the Purchase Order.
Invoice Information block	
Invoice Date*	This is a required field - Use the calendar icon to select the date of the invoice.
Priority	Select the priority from the drop-down menu.
Check No	This field is read only until the record reaches the End step.
Check Processed Date	This field is read only until the record reaches the End step.
Check Date	This field is read only until the record reaches the End step.
P6 Activity	Select a P6 activity to associate with this record.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Item Logs

Line Items Tab

In this field	Do this
General block	
Cost Code*	This is a required field -Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This field is auto-populated from the cost code/
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Description	This is not a required field - Enter a description for the line item.
Spend Category block	
Effective Date	You can edit the Effective Date
Spend Category	
Work Package	You can select a Work Package.
Unit of Measure	Select the Unit of Measure for the item specified on the line item line item
Item Quantity *	This is a required field - Enter the number of items specified on the line item
Item Unit Price *	This is a required field - Enter the price of the item specified on the line item
Amount	This value is auto-calculated (Item Quantity x Item Unit Price)

Routing an Invoices Record from the Approval Step

To route a record from the Approval step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.

- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the Invoices record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.

   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing an Invoices Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the Upper form section you can change the following record details.
   - In the *General* block, you can revise the record **Title**.
   - In the *PO Information block*, fields are read only.
   - In the *Invoice Information block*, you can edit **Invoice Date**, and Priority.
     - Check No, Check Processed Date, and Check Date fields become available on the End step.
   - In the *Vendor Information block*, all fields are read-only and entries come from the vendor selected on the contract.
5) In the **Line Items** section you can modify or delete line items. Changes to line items dynamically update the **Amount** and **Project Currency Amount** fields in the Upper form's *General block* and the **Purchase Order SOV**.
6) When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit**— This action sends the record back to the Approval step in Pending status.

   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.

   - **Cancel** — This action sends the record to the **End** step in Canceled status. The To and Cc field are unavailable.
7) In **Action Details**, depending upon the workflow action selection, select who should receive the task and who should be copied on the action.
8) When ready, click **Send**.

Viewing an Invoices Record from the End Step

This is the last step in the workflow. Once on the **End** step the record is viewable only in the business process log.

To view a record on the End step

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Purchase Orders** node.
3) Select **Invoices**. The **Invoices** log opens.
4) Open the record. From the End step you can:
   a. Enter the Check No.

b. Select the Check Processed Date using the calendar icon or manually in dd/mm/yyyy format.
c. Select the Check Date using the calendar icon or manually in dd/mm/yyyy format.
d. Click **Save** to retain check information in the form.

5) In Task Details you can see the record status and the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.
8) Click **SOV** to see the schedule of values.

Payments and Journal Entries

Payments from Owner Business Process (Contractor Project)

Purpose

You can use a Payments from Owner business process to record check number, check processing date, and check date information from an Invoices record or a Payment Applications record.

Business process characteristics

Payments is a non-workflow, project-level, line item-type business process. You can create multiple payments records for your company because this is a non-workflow business process, you access a Payments record in the business process log. Integration is defined for Upper and Detail forms, which means you can create a Payments integration file to batch upload financial system records. An individual help file is available for this business process.

Record Statuses

- Pending, which is a non-terminal status
- Closed, which is a terminal status. If you click **Finish Editing** while the record is in closed status, the record is permanently closed and can never be opened again.

Groups associated with this business process

Members of the Project Coordinators group can create and edit this business process.

Additional Information

- Can be used for both Payment Application and Invoice payments.
- Enabled for mobile and hand-held devices.
- The Administrator can upload the business process help file.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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Creating a Payments from Owner Record

To create a new Payments from Owner record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Payments and Journal Entries** node.
3) Click **Payments from Owner**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a **Title** before you can save, and thereby create a permanent Payments record.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
6) Complete the Line Items form according to the Line Items table. You must complete all required fields on each line that you entered before you can save the Line Items form.
7) Click **Save** (if using the grid) or **OK** (if using the Line Item form) to save the form. The Line Items form closes.

   If you are using the grid and do not click **Save** before closing it, you will lose your line item changes.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you click Send.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	This field is auto-populated.

In this field	Do this
Rate in Project Currency	Unifier auto-calculates this value. Currency conversions use the exchange rate defined in the active Exchange Rates set in Unifier's Standards & Libraries. Until you modify a currency rate, Unifier uses the last active rate for that currency.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates upon record creation.
Record Last Update Date	This is a read-only field that shows the last time the someone updated the record.
Status	This is a required field - select the status of the Payments record. The choices are Pending and Closed. Note: If you select Closed status and click Finish Editing, the record will be permanently closed.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Project Currency Amount	This is an auto-calculated field that shows the total amount of the line items in project currency. Currency conversions use the exchange rate defined in the active Exchange Rates set in Unifier's Standards & Libraries. Until you modify a currency rate, Unifier uses the last active rate for that currency.
Description block	
Description	Enter a description for the payment.
PO Information block	
Payment Application	This selection allows you to choose the reference Payment Applications record.
Contract No	Contract number is auto-populated from the selected Payment Applications record.
Invoice Date	Invoice date is auto-populated from the selected Payment Applications record.
Priority	Priority is auto-populated from the selected Payment Applications record.
Check No	Check number is auto-populated from the selected Payment Applications record.

In this field	Do this
Check Processed Date	Check processed date is auto-populated from the selected Payment Applications record.
Check Date	Check date is auto-populated from the selected Payment Applications record.

Line Item Table

General block	
Cost Code*	Enter the cost code for this line item.
Code Name	This field is auto-populated from the cost code.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Amount	Enter the payment amount for this cost code.

Saving the Payments from Owner Record

To save the Payments from Owner record:

Click either:

- **Finish Editing** to save the form in read-only mode.
  - If the record status is Pending, you can return the record to Edit mode and modify the Upper form and Line Items form fields.
  - If the record status is Closed, the record is permanently read-only.
- **Save** to leave the form in edit mode.

Payments Business Process

Purpose

You can use a Payments record to record check number, check processing date, and check date information from an Invoices record or a Payment Applications record.

Business process characteristics

Payments is a non-workflow, project-level, line item-type business process. You can create multiple payments records for your company because this is a non-workflow business process, you access a Payments record in the business process log. Integration is defined for Upper and Detail forms, which means you can create a Payments integration file to batch upload financial system records. An individual help file is available for this business process.

Record Statuses

- Pending, which is a non-terminal status
- Closed, which is a terminal status. If you click **Finish Editing** while the record is in closed status, the record is permanently closed and can never be opened again.

Groups associated with this business process

Members of the Project Coordinators group can create and edit this business process.

Additional Information

- Can be used for both Payment Application and Invoice payments.
- Enabled for mobile and hand-held devices.
- The Administrator can upload the business process help file.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

In This Section

Creating a Payments Record 294
Adding Line Items to the Payment Record 296
Saving the Payments Record 297

Creating a Payments Record

To create a new Payments record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Payments and Journal Entries** node.
3) Click **Payments**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a **Title** before you can save, and thereby create a permanent Payments record.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
6) Complete the Line Items form according to the Line Items table in ***Adding Line Items to the Payment Record*** (on page 296). You must complete all required fields on each line that you entered before you can save the Line Items form.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you click Send.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	This field is auto-populated.
Rate in Project Currency	Unifier auto-calculates this value. Currency conversions use the exchange rate defined in the active Exchange Rates set in Unifier's Standards & Libraries. Until you modify a currency rate, Unifier uses the last active rate for that currency.

In this field	Do this
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates upon record creation.
Record Last Update Date	This is a read-only field that shows the last time the someone updated the record.
Status	This is a required field - select the status of the Payments record. The choices are Pending and Closed. Note: If you select Closed status and click Finish Editing, the record will be permanently closed.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Project Currency Amount	This is an auto-calculated field that shows the total amount of the line items in project currency. Currency conversions use the exchange rate defined in the active Exchange Rates set in Unifier's Standards & Libraries. Until you modify a currency rate, Unifier uses the last active rate for that currency.
Description block	
Description	Enter a description for the payment.
PO Information block	
Note: the PO Information block allows you to select an Invoices record or a Payment Applications record as the payment reference. The table that follows presents **Invoices** first, then **Payment Applications**.	
Invoices Selection	
Invoice	This selection allows you to choose the reference Invoices record.
PO Number	Purchase order number is auto-populated from the selected Invoices record.
Invoice Date	Invoice date is auto-populated from the selected Invoices record.
Priority	Priority is auto-populated from the selected Invoices record.
Check No	Check number is auto-populated from the selected Invoices record.
Check Processed Date	Check processed date is auto-populated from the selected Invoices record.

In this field	Do this
Check Date	Check date is auto-populated from the selected Invoices record.
Payment Application Selection	
Payment Application	This selection allows you to choose the reference Payment Applications record.
Contract No	Contract number is auto-populated from the selected Payment Applications record.
Invoice Date	Invoice date is auto-populated from the selected Payment Applications record.
Priority	Priority is auto-populated from the selected Payment Applications record.
Check No	Check number is auto-populated from the selected Payment Applications record.
Check Processed Date	Check processed date is auto-populated from the selected Payment Applications record.
Check Date	Check date is auto-populated from the selected Payment Applications record.
P6 Activity	Select a P6 activity.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Adding Line Items to the Payment Record

The record must be in Edit mode to enter line items.

To enter line items:

1) Click **Edit** if the Payments record is in read-only mode.
2) In the **Line Items** section click **Add** or **Grid**. The Line Item form opens.
3) Complete the Line Item form according to the Line Item table below. You must complete all required fields on each line that you enter before you can save the Line Item.
4) Click **Save** (if using the grid) or **OK** (if using the Line Item form) to save the form. The Line Items form closes.

   If you are using the grid and do not click **Save** before closing it, you will lose your line item changes.

Line Item Table

General block	
Cost Code*	Enter the cost code for this line item.
Code Name	This field is auto-populated from the cost code.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Amount	Enter the payment amount for this cost code.

Saving the Payments Record

To save the Payments record:

Click either:

- **Finish Editing** to save the form in read-only mode.
  - If the record status is Pending, you can return the record to Edit mode and modify the Upper form and Line Items form fields.
  - If the record status is Closed, the record is permanently read-only.
- **Save** to leave the form in edit mode.

Journal Entries Business Process

Purpose

This is a business process for adjusting spending line items. It is usually used to reassign costs to alternate cost centers or General Ledger codes.

Business process characteristics

Journal Entries is a workflow, project-level, line item-type business process. You can create multiple Journal Entries records. Because Integration is defined for Upper and Detail forms, you can create a Journal Entries integration file to upload your records. An individual help file is available for this business process.

Record Statuses

- Pending, non-terminal status.
- Approved, terminal status.
- Canceled, terminal status.
- Rejected, terminal status.

Groups associated with this business process

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.

Additional Information

- Enabled for mobile and hand-held devices.
- The Administrator can upload the business process help file.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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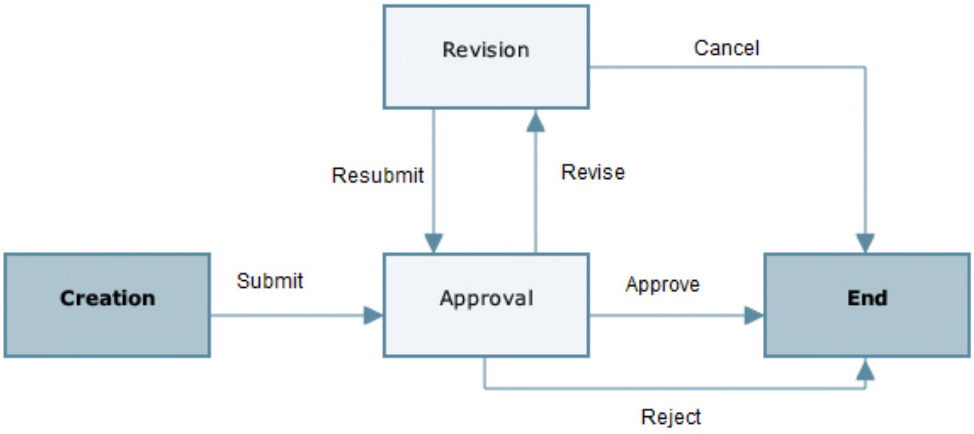
Routing a Journal Entries Record from the Approval Step 302
Routing a Journal Entries Record from the Revision Step 303
Viewing a Journal Entries Record on the End Step 304

Journal Entries Workflow

Below are the four steps of the Journal Entries workflow. The workflow action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel Journal Entry" then the record moves to the End step with a record status of "Canceled." For all steps, except the End step, sending a record to the next step creates a task for the assignee.



Creating a Journal Entries Record

The first step in the Journal Entries business process workflow is the Creation step. Members of the **Creator** group can create this business process.

To create a new Journal Entries record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Payment and Journal Entries** node.
3) Select **Journal Entries**.

4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in your **Drafts** folder.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
6) Complete the Line Items form according to the Line Items table below. For each line that you enter, you must complete all required fields before you can save the Line Items form.
7) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.

   If you are using the grid and do not click **Save** before closing it, you will lose your line item changes.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens showing a list of available task recipients.
   b. Select the user or group who will receive the task on the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
10) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date shows when the record is due, based on the business process setup. If the record becomes late, Unifier displays the record Title in bold red.

In this field	Do this
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Journal Entry Summary	
PO Number	If the Journal Entry is for a Purchase Order select the Purchase Order from the **Select** drop-down menu.
Contract Reference	If the Journal Entry is for a Contract select the Contract from the **Select** drop-down menu.
Retainage Information block	
Retainage Adjustments	Select either Yes or No.
Retainage	Enter the retainage percentage.
Description block	
Description	Enter a description for the journal entry.

Item Logs

Line Items Tab

In this field	Do this
General block	
Cost Code*	This is a required field -Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This field is auto-populated from the cost code.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Amount	Enter the amount of the journal entry.

Routing a Journal Entries Record from the Approval Step

To route a record from the Approval step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the Journal Entries record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
   b. Click **Cc...** Select the user or group who will receive the record on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.

   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing a Journal Entries Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log. When your task is complete, you can select one of two Workflow Action options, as described on step 8.

To route a Journal Entries record from the Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the **Line Items** section you can Modify, Add, or Delete Line Items as needed. You must complete all required fields before you can save the Line Items form.
5) Click **Save** to save the Line Items.
6) When ready, select a workflow action. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.

   This action activates **Action Details**.
7) In **Action Details**, select who should receive the task and who should receive a copy of the record in **Collaboration** > **Messages**.
8) When ready, click **Send**.

Viewing a Journal Entries Record on the End Step

This is the last step in the workflow. Once on the **End** step the record is viewable only in the business process log.

To view a record on the End step

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node and expand the **Payment and Journal Entries** node.
3) Select **Journal Entries**. The **Journal Entries** log opens.
4) Open the record. Here you can:
   a. Enter the Check No.
   b. Select the Check Processed Date using the calendar icon or manually in dd/mm/yyyy format.
   c. Select the Check Date using the calendar icon or manually in dd/mm/yyyy format.
5) In Task Details you can see the record status and the text "Record has been closed."
6) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
7) Click **View Graphic** to see an image of the workflow.

Risks and Issues Business Process

Purpose

The Risk & Issues business process provides a log for documenting, tracking, and estimating impacts of open issues and risks. In effect, it is a log of items that may impact schedule, scope, and cost.

Business process characteristics

Risks & Issues is a project-level, cost-type, non-workflow, business process from which you can create multiple instances. An individual help file is available for this business process.

Record Statuses

Open, Closed, Canceled, none of which are terminal.

References

Contracts

Groups associated with this business process

- Project Manager and Project Coordinators can create and edit this business process.

Additional Information

- Risks & Issues is enabled for mobile phones and hand-held devices.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

  To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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Adding Line Items to the Risks and Issues Record 310
Saving the Risk and Issues Record 311

Creating a Risks and Issues Record

To create a new Risk and Issues record

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Financial Transactions** node.
3) Select **Risks and Issues**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a **Title** and a **Status** before you can save the Risks & Issues record.

   Saving a non-workflow business process creates a permanent record.
5) In the **Line Items** section click **Add** or **Grid**. The Line Items form opens.
6) Complete the Line Items form by following the directions in the Line Items Table below. You must complete all required fields on each line that you entered.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you click Send.
Title*	This is a required field - Enter a name for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates upon record creation.
Record Last Update Date	This is a read-only field that shows the last time the someone updated the record.

In this field	Do this
Status*	This is a required field - select the status of the Payments record. The choices are Pending and Closed. Note: If you select Closed status and click Finish Editing, the record will be permanently closed.
Contract Reference	Select the Contract that is at risk or has issues.
Description block	
Description	Enter a description for the payment.
Estimated Costs block	
Best Case Amount	Enter the value that would most likely be the *least* amount needed to resolve the risk or issue.
Worst Case Amount	Enter the value that would most likely be the *highest* amount needed to resolve the risk or issue.
Probable Case Amount	This value is the sum of all detail lines.
Risk Details block	
Risk Category	Use the drop-down menu to select the risk category.
Risk Priority	Use the drop-down menu to select the risk priority.
Environmental Impact	The default entry is **Yes**; use the drop-down menu to change this selection to **No** if appropriate.
Legal Review Required	The default entry is **Yes**; use the drop-down menu to change this selection to **No** if appropriate.
Change Request Required	The default entry is **Yes**; use the drop-down menu to change this selection to **No** if appropriate.
Forecasted Resolution Date	Use the calendar icon to select the forecasted resolution date.
Scope Change Required	The default entry is **Yes**; use the drop-down menu to change this selection to **No** if appropriate.
Schedule Impact (Days)	Enter the number of days you expect resolving the risk or issue will impact the project schedule.
Schedule Change Required	The default entry is **Yes**; use the drop-down menu to change this selection to **No** if appropriate.
Resolution block	
Action to Resolve	Enter the action to resolve this risk or issue.
P6 Activity	Select a P6 activity to associate with this record
P6 Planned Cost	This is a read-only field.

In this field	Do this
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Item Logs

Line Items Tab

General Block	
Cost Code*	This is a required field - Enter the cost code for this line item. You can either enter it directly or use the cost code picker.
Code Name	This read-only field is auto-populated from the cost code name.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Amount	Enter the amount for the fund appropriation to this cost code.
Line Item Status	Enter the line item status.

Adding Line Items to the Risks and Issues Record

The record must be in Edit mode to enter line items.

To enter line items on the Risk and Issues Record

1) Click **Edit** if the Risks & Issues record is in read-only mode.
2) In the **Line Items** section click **Add** or **Grid**. The Line Item form opens.
3) Complete the Line Item form according to the Line Item table below. You must complete all required fields on each line that you enter.
4) Click **Save** (if using the grid) or **OK** (if using the Line Item form) to save the form. The Line Items form close.

   If you are using the grid and do not click Save before closing it, you will lose your line item changes.

Line Item Table

In this field	Do this
Tab Name	You can enter a tab name.
General block	
Cost Code*	This is a required field - Select the cost code using the cost code picker.
Code Name	This field is auto-populated from the cost code.

In this field	Do this
Short Description*	This is a required field - Enter a brief description of the item specified on the line item
Amount	Enter the Amount.
Line Item Status	Select the line item status.

Saving the Risk and Issues Record

- ***To save the Risk & Issues record***

Click either:

- **Finish Editing** to save the form in read-only mode. Regardless of the record status, you can click the **Edit** button to return the record to edit mode.
- **Save** to leave the form in edit mode.

Change Management (Owner Project Only)

Change Orders Business Process

Purpose

You can use the Change Order business process to make a formal commitment change to a contract. You can see the change impact in the project's cost sheet.

Business process characteristics

This is a project-level, cost-type business process with line items and workflow. The Change Order business process uses the Payment Application schedule of values. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status Rejected, a terminal status.
- Canceled, a terminal status.

Groups associated with this business process

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.

Relationships associated with this business process

- The creator must select a contract.
- The business process auto-populates vendor information from the contract vendor selection.

Additional Information

- The Summary Payment Application-SOV becomes available upon association with a contract during record creation.
- The Change Order business process is enabled for integration.
- Enabled for integration.
- Enabled for publish path.

  Files attached to base products' business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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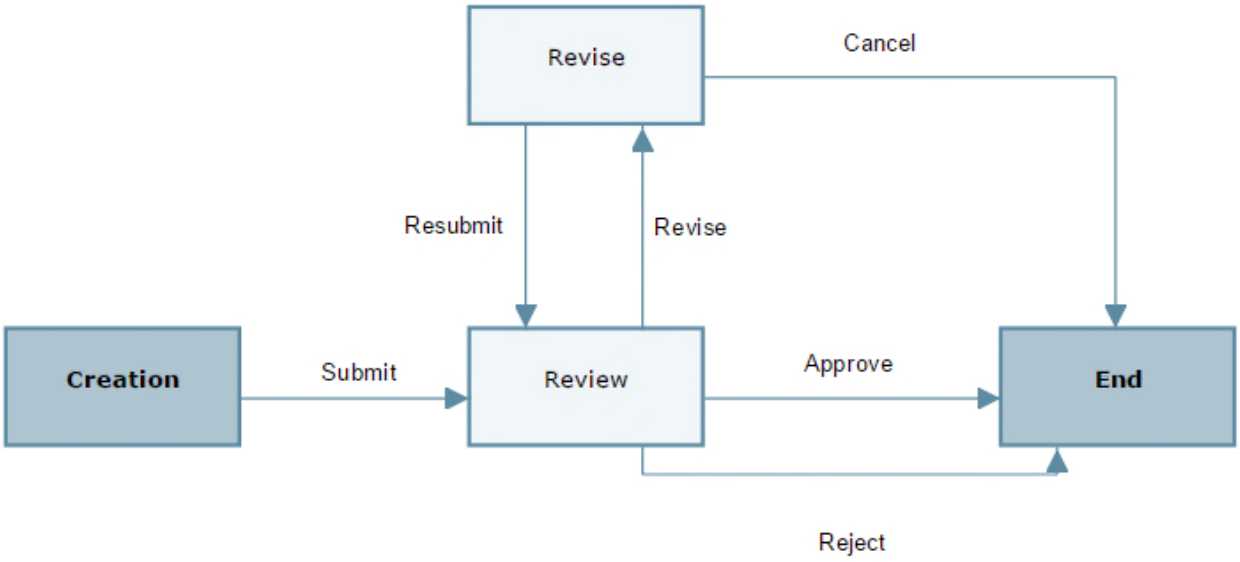
Change Orders Workflow

Below are the four steps of the Change Orders workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel Change Orders" then the record moves to the End step with a record status of "Canceled." For all steps, except the End step, sending a record to the next step creates a task for the assignee.



Creating a Change Orders Record

The first step in the Change Orders business process workflow is the Creation step.

To create a new Change Orders record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Change Management** node.
3) Click **Change Orders**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in the **Drafts** folder.
5) In the **Summary Items** section, click **Add**.
   - Select **Lump Sum** to enter a Change Order as a lump sum amount.
   - Select **Unit Cost** to enter Change Order separately for each item. You can only enter item quantity and item unit cost.
   - Select **Modify Committed Line item** to make changes to an existing contracts line item. From the Commit Line Item Picker Window select a line item and click **Select**.
6) Complete the Line Items form according to the Line Items table below.
7) Click **Add Cost**.
8) Select a cost code to associate with this cost item, and click the **Select** button. You can distribute the total amount across multiple cost codes. Click the **Add Remaining** button to add the remaining amount to a cost code.
9) Click **Save** to save the Line Item. Unifier automatically calculates the aggregate value of the line items and displays the amount in Total Amount at the bottom of the record as well as in the Amount field in the upper form.
10) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.
11) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
12) In **Action Details**, select who should receive the record.
    a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
    b. Select the user or group who will receive the task on the Approval step.
    c. Click **Add**.
    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
    e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
13) Click **Send** to route the record to the Review step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Title*	This is a required field - Enter a title for the record.

In this field	Do this
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	This is a read-only field that is auto-populated when you select the contract.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items.
CO Information block	
Contract/PO*	This is a required field - Select the contract for the change order from the drop-down menu. Selecting a contract activates the SOV button in the record tool bar.
Contract No	This is a read-only field - The contract number is auto-populated from the selected contract.
PO Description	Enter a description for the potential change order.
Reason*	This is a required field - Select a reason for the change from the drop-down menu.
Change Reason*	This is a required field - Enter a detailed reason, up to 4000 characters, for the potential change order.
Schedule Impact (Days)*	This is a required field - Enter the number of days this potential change order could affect the schedule.
Scope of Work*	This is a required field - Enter a detailed scope of work, up to 4000 characters, for the potential change order.
Vendor Information block	
Vendor ID	This field is auto-populated from the Vendor record associated with the Contract record.

In this field	Do this
Vendor Name	This field is auto-populated from the Vendor record associated with the Contract record.
Primary Contact	This field is auto-populated from the Vendor record associated with the Contract record.
Email	This field is auto-populated from the Vendor record associated with the Contract record.
Phone	This field is auto-populated from the Vendor record associated with the Contract record.
Original Contract Amount	Unifier auto-populates this value based on the contract selection.
Net Changes by Change Orders	Unifier auto-populates this value based on net changes to change order amounts (additions and reductions).
Revised Contract Amount	Unifier auto-populates this value based on the formula: Original Contract Amount + Net Changes by Change Orders
Amount Previous to this Change Order	This field is auto-populated.
Change Request Amount	This field is auto-populated.
Pending Changes	This field is auto-populated.
Potential Contract Amount	This field is auto-populated.
Actuals to Date	This field is auto-populated.
Contract Balance	This field is auto-populated.
P6 Activity	Select a P6 activity.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Line Items

In this field	Do this
Cost Line Item Type	This is auto-populated based on the Line Item Type you selected.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Spend Category	Select a category from the drop-down menu.

In this field	Do this
Item Quantity*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the number of items specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Unit of Measure*	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the price of the item specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Amount	If the Cost Line Item Type is Lump Sum, then enter the total amount for this line item. This is a read-only field if the Cost Line Item Type is Unit Cost. It is auto-calculated using the formula Item Quantity x Item Unit Cost.
Change Order #	This field is auto-populated with the change order number.
Reference	This is a read-only field. It references a potential change order.
Consolidated?	This is a read-only field. It displays if the potentials changes have been consolidated.
Costed Quantity	This a read-only field.
Not costed Amount	This a read-only field.
Costed Amount	This a read-only field.
Not Costed Quantity	This a read-only field.
P6 Activity	Select a P6 activity associated with this item.
P6 Planned Cost	This read-only field is based on the selected P6 activity.
P6 Planned Start	This read-only field is based on the selected P6 activity.
P6 Planned Finish	This read-only field is based on the selected P6 activity.
Contract No	This is a read-only field. It displays the contract number.
Contract Name	This is a read-only field. It displays the contract name
Change Order	This is a read-only field.

Routing a Change Orders Record from the Review Step

To route a record from the Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the Change Orders record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

   a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.

   b. Click **Cc...** Select the user or group who will receive the record on the next step.

   c. Click **Add**.

   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Notifications** log.
   - **Reject** — this selection will send the record to the End step in **Rejected** status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing a Change Orders Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Revision step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the Upper form section you can change the following record details.
   - In the *General* block, you can revise the record **Title**.
   - In the *CO Information* block, most fields are editable except **Contract No** and **Revised Contract Completion Date** (auto-calculated based on the number of days of the schedule impact).
   - In the *Contract Summary* block, all fields are read-only and come from the contract or line items in this change order.
   - In the *Vendor Information* block, all fields are read-only and come from the vendor selected on the contract.
5) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form. Follow the same directions as adding line items during record creation. Changes to line items are reflected in the *Contract Summary* block of the Upper form.
6) Click **OK** to save the Line Items.
7) When ready, select a workflow action. This action activates **Action Details**. The choices are:
   - **Resubmit** — This action sends the record back to the Approval step in Pending status.

   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.
   e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
   f. Click **Add**.
   g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.

- **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.

8) In **Action Details**, depending upon the workflow action selection, select who should receive the task and who should be copied on the action.
9) When ready, click **Send**.

Viewing a Change Orders Record on the End Step

This is the last step in the workflow. You cannot take action on this step because the record is in a terminal status: Approved, Rejected, or Canceled. Once on the End step the record is viewable only in the business process log.

To view a record on the End step:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Change Management** node.
3) Click **Change Orders**. The Change Orders log opens.
4) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.
7) Click **SOV** to see the schedule of values.

Change Management (Contractor Project Only)

Budget Change Orders Business Process

Purpose

You can use the Budget Change Order business process to make formal commitment changes to a Budget Items record. The line items are consolidated from the Potential Changes business process records. Upon approval, the Budget Items SOV and the Project cost sheet are updated.

Groups associated with this business process

- Creation: Project Coordinators
- Internal Review: Project Manager, All Project Users group can be copied.
- Owner Review: Customer, All Project Users group can be copied.
- Revision: Project Coordinators, All Project Users group can be copied.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status.
- Canceled, a terminal status.

Relationships associated with this business process

- The creator must select a Budget Items record.
- The business process auto-populates vendor information from the Budget Item vendor selection.

Additional Information

- The Budget Items-SOV becomes available upon association with a contract during record creation.
- Enabled for integration.
- Enabled for publish path.

  Files attached to base products business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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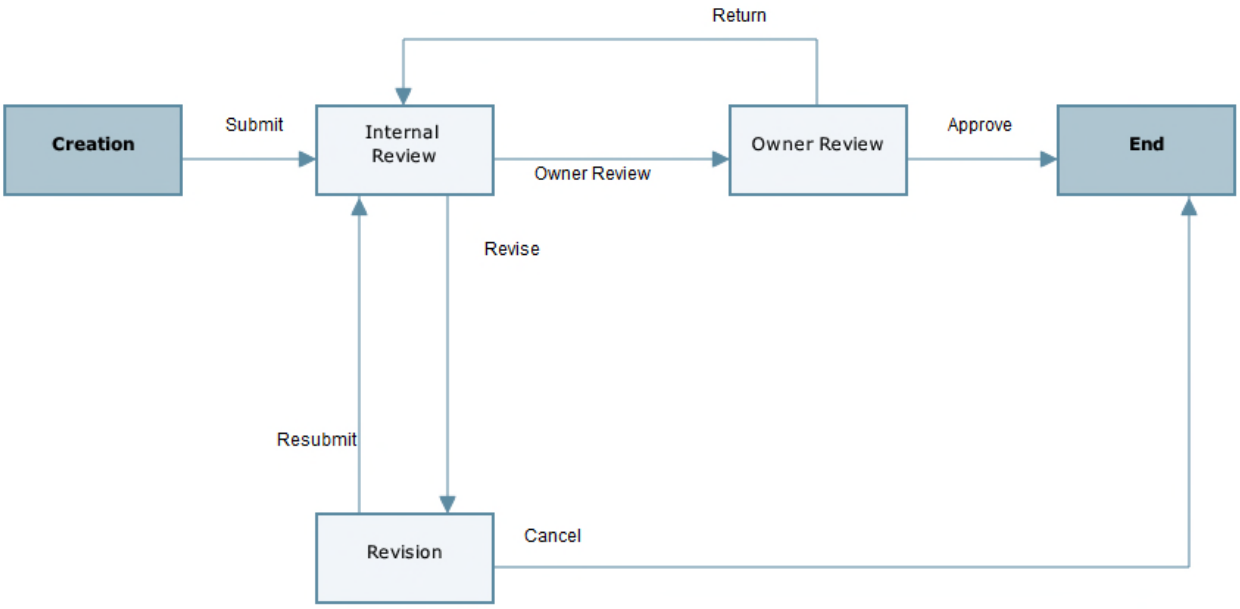
Budget Change Orders Workflow

Below are the steps in the Budget Change Orders workflow.



Creating a Budget Change Order

To create a Budget Change Order record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Change Management** node.

3) Select **Budge Change Orders**.
4) From the BP log page, click **Create**.Refer to the table below to complete the Upper form.
5) From the **Change Items** tab, select **Copy** > **Consolidate Line Items**.
6) Select **Potential Changes** business process for line item consolidation and click **OK**.
7) Select a Potential Changes record and click **All Line Items** or **Select Line Items**. If you selected **All Line Items**, all line items associated with the selected potential changes record are copied. If you selected **Select Line Items**, you can select the individual line items you want to copy and click **Copy**.
8) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
10) Click **Send** to route the record. Unifier displays a message stating that the record has been submitted successfully.

Upper Form

In this field	Do this
Project Number	This is a read-only field.
Project Name	This is a read-only field.
Title *	This is a required field. Enter a title for this form.
Transaction Currency	Read-only field.
Contract/PO *	This is a required field. Select an approved budget from the Budget window by clicking the **Select…**
Record Number	This is field. It shows the record number of the current Budget Change Order record
Creator	This field gets populated with the name of the person who creates the Budget Change Order. Clicking the hyper-link opens the user's profile in a pop-up window.
Creation Date	This is a read-only field. It displays the date the record was created.
Status	This is a read-only field. It displays the status of the current record.
Amount	This is a read-only field. It displays the sum of total amounts from the lower form.

In this field	Do this
P6 Activity	Select a P6 activity to associate with this record.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Routing a Budget Change Order Record from the Internal Review Step

To route a record from the Internal Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Review step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. The choices are:
   - **Owner Review** — this selection will send the record to the Owner Review step in Pending status.
   - **Revise** — this action keeps the workflow in flight and in Pending status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.

d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

8) Click **Send** to route the record to the next step.

Routing a Budget Change Order Record from Owner Review Step

To route a record from the Owner Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

- Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Review step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. The choices are:
   - **Approve** — this selection will send the record to the End step in Approved status.
   - **Return** — this action sends the record back to the Internal Review step in Pending status.
6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.

e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

8) Click **Send** to route the record to the next step.

Routing a Budget Change Order Record from Revision Step

To route a Budget Items record from the Revision step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form.
5) Click **OK** to save the Line Items.
6) When ready, select a workflow action. The choices are:
   - **Resubmit** — This action sends the record back to the Internal Review step in Pending status.
   - **Cancel**— This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the **Review** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
8) When ready, click **Send**.

Viewing a Budget Change Order Record on the End Step

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

To view a Budget Items record on the End step:

1) Go to your project and ensure that you are in User mode.
2) Click to expand the **Change Management** node.
3) Click **Budget Change Orders**. The Budget Change Orders log opens.
4) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.

Potential Changes Business Process

Purpose

You can use the Potential Changes business process record to consolidate potential changes that can affect your budget. The line items are consolidated in the Budget Change Request tab.

Business process characteristics

This is a project-level, cost-type business process with line items and workflow. This business process auto creates a Change Orders BP and a Risks and Issues BP if you have associated risks or issues. An individual help file is available for this business process.

This business process can be auto created by RFI initiated by a contractor or subcontractor.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status Rejected, a terminal status.
- Canceled, a terminal status.

Groups associated with this business process

- Creation: Project Coordinators and Project Manager
- ID of Impacted Contracts: Project coordinators. All project Users can be copied.
- Subcontractors Quotes Review: Project coordinators and Project Managers. All project Users can be copied.
- Budget Change Request Prep: Project Managers. All project Users can be copied.
- Owner Review: Customer. All project Users can be copied.

Relationships associated with this business process

- The creator must select a contract record.
- The business process auto-populates vendor information from the Budget Items record.

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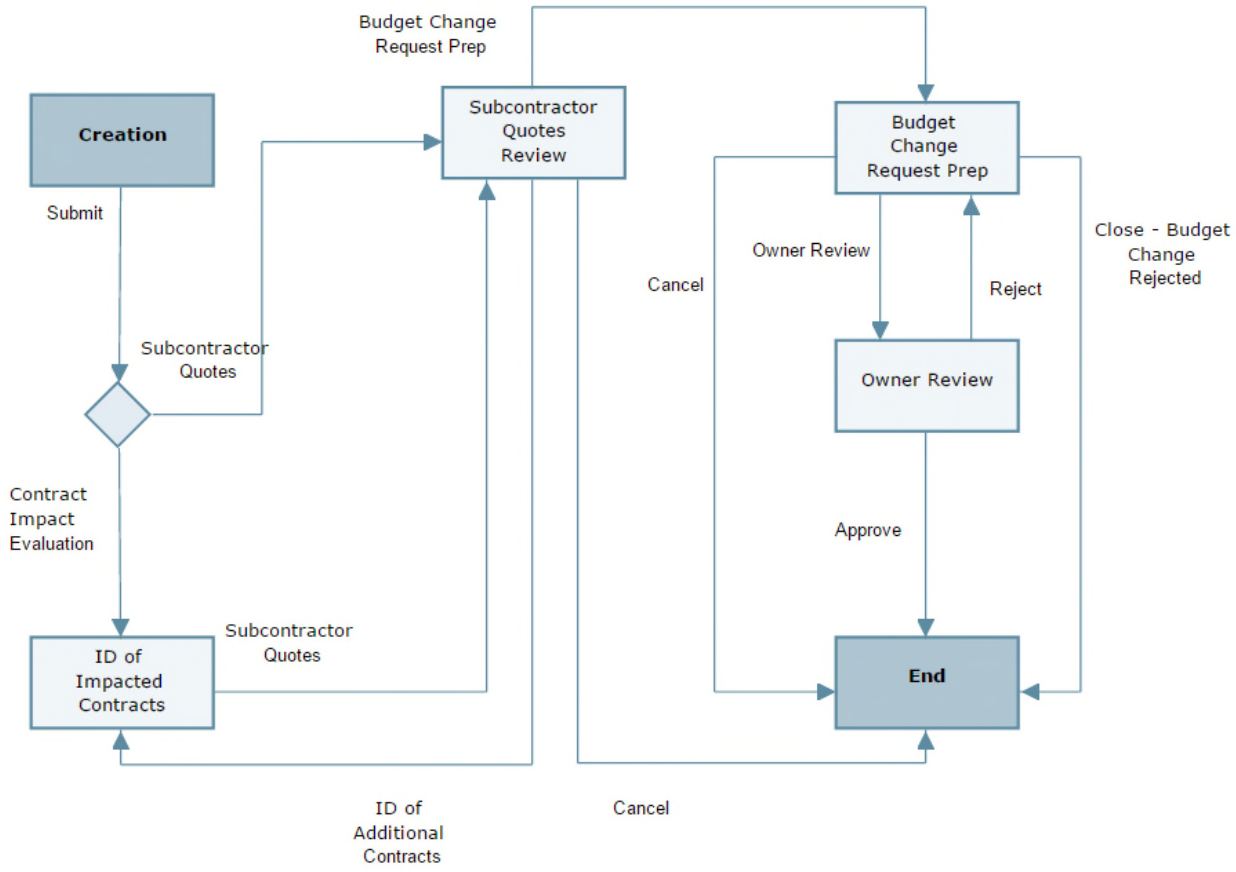
Potential Changes Workflow

Below are the steps in the Potential Changes workflow.



Creating a Potential Changes Record

To create a Potential Changes record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Change Management** node.
3) Select **Potential Changes**.
4) From the BP log page, click **Create**.Complete the form according to the Upper form table below. You must complete all required fields. You can save the form as a draft at any time. Unifier stores the draft in the **Drafts** folder.
5) Select the **Impacted Contracts** tab in the lower form and click **Add** to list the contracts that this potentials change affects.
6) Refer to the table below to complete the required fields in the line items form and click **OK**.
7) Repeat steps 6 to 7 to add additional contracts.
8) Select the **Related Issues** tab and click **Add** to create a new issue or add an existing issue.

9) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**.
10) In **Action Details**, select who should receive the record.
    a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
    b. Select the user or group who will receive the task.
    c. Click **Add**.
    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
    e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
11) Click **Send** to route the record. Unifier displays a message stating that the record has been submitted successfully.

In this field	Do this
Change Title /Name *	This is a required field. Enter a title or name for this form.
Description*	This is not a required field. Enter description of the change
Potential Cost Impact?	This is not a required field. If the change will have any potential cost related impacted select the appropriate value from the pull down list.
Estimated Cost	This is not a required field. Enter cost amount that would get impacted.
RFI-Contractor Record #	If this record was created from the RFI Contractor BP, this field displays the associated RFI Contractor record number as a hyperlink. Clicking the record number opens that RFI record.
RFI-Subcontractor Record #	If this record was created from the RFI Contractor BP from the RFI subcontractor BP, this field displays the associated RFI subcontractor record number as a hyperlink. Clicking the record number opens that RFI record.
Record Number	This is read-only field. It shows the record number.
Status	This is a read-only field. It displays the status of the current record.
Creation Date	This is a read-only field. It displays the date the record was created.
Creator	This is a hyperlink. This field gets populated with the name of the person who creates this record.
P6 Activity	Select a P6 activity to associate with this change.
P6 Planned Cost	This is a read-only field.

In this field	Do this
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Impacted Contracts Line Items

In this field	Do this
Contract *	This is a required field. Select the Contract from the Contracts – Committed window that needs to be associated with this change management
Vendor Name	This is a read-only field. It auto-populated with the selected contract's title/description.
Contract Number	This is a read-only filed. It auto-populated with the selected contract's contract number.
Contract Main Contact*	Select a name from the drop-down list.
Short Description *	This is not a required field. It auto-populates with the Change Title, you can however, if you like, replace the text with something else.
P6 Activity	Select a P6 activity to associate with this change.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Related Issues Line Items

In this field	Do this
Selected Issue #	Click **Select…** to select an existing issue to associate with this record.
Create new issue?	If you want to create a new issue, select the appropriate value from the pull down list.
Issue Title / Short Description	If you selected an existing issue (from the Selected Issue#) this field displays the title /short description of that selected issue. If you want to create a new issue, enter a title or short description for the new issue.

In this field	Do this
Issue Details	If you selected an existing issue (from the Selected Issue#) this field displays the issue detail of that selected issue. If you want to create a new issue, enter an issue detail for the new issue.
Short Description	This is a read only field. It is auto-populated with the title field on the upper form.
New Issue Record #	This is a read-only field. Once an issue is created it displays the new issue record number as a hyperlink. Clicking the hyperlink opens the issue record in a new window.

Routing from Subcontractor Quotes Review Step

In this step of the workflow, you can choose to route the record to the Budget Change Request Prep step or the ID of Impacted Contracts step- if this change impacts additional contracts. To route this record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Select the **Related Issues** tab and click **Add** to create a new issue or add an existing issue.
5) Click **Workflow Actions** and select from one of the following options:
   - **ID of Additional Contracts** — this selection will send the record to the ID of Additional Contract step.
   - **Budget Change Request Prep** — this action will send the record to the Budget Change Request Prep step.
   - **Cancel** — this action takes the workflow to the End step.
6) In **Action Details**, select who should receive the record.

a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
b. Select the user or group who will receive the task.
c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

7) Click **Send** to route the record to the next step.

Routing from the ID of Impacted Contracts Step

In this step, you can list contracts that this potential change impacts. This will be the first step in your workflow if this record was auto created by the Subcontractor Requests for Information BP. To route this record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

- Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Select the **Impacted Contracts** tab in the lower form, and click **Add** to list the contracts that this potentials change affects.
5) Refer to the table below to complete the required fields in the line items form and click **OK**.
6) Repeat steps 5 to 6 to add additional contracts.
7) Select the **Related Issues** tab and click **Add** to create a new issue or add an existing issue.
8) Click **Workflow Actions** and select **Subcontractor Quotes**.
9) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.

d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

10) Click **Send** to route the record to the next step.

Impacted Contracts Line Items

In this field	Do this
Contract *	This is a required field. Select the Contract from the Contracts – Committed window that needs to be associated with this change management
Vendor Name	This is a read-only field. It auto-populated with the selected contract's title/description.
Contract Number	This is a read-only filed. It auto-populated with the selected contract's contract number.
Contract Main Contact*	Select a name from the drop-down list.
Short Description *	This is not a required field. It auto-populates with the Change Title, you can however, if you like, replace the text with something else.
P6 Activity	Select a P6 activity to associate with this change.
P6 Planned Cost	This is a read-only field.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Related Issues Line Items

In this field	Do this
Selected Issue #	Click **Select…** to select an existing issue to associate with this record.
Create new issue?	If you want to create a new issue, select the appropriate value from the pull down list.
Issue Title / Short Description	If you selected an existing issue (from the Selected Issue#) this field displays the title /short description of that selected issue. If you want to create a new issue, enter a title or short description for the new issue.

In this field	Do this
Issue Details	If you selected an existing issue (from the Selected Issue#) this field displays the issue detail of that selected issue. If you want to create a new issue, enter an issue detail for the new issue.
Short Description	This is a read only field. It is auto-populated with the title field on the upper form.
New Issue Record #	This is a read-only field. Once an issue is created it displays the new issue record number as a hyperlink. Clicking the hyperlink opens the issue record in a new window.

Routing from the Budget Change Request Prep Step

In this step of the workflow, you can either reject the potential change request or send it to the owner for review. To route this record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) For the field, **Enter Reason for Request**, enter a reason for this change.
5) Select the **Budget Change Items** tab and click **Add** and select **Lump Sum**, or **Unit Cost**, or **Modify Committed Line Item**. You can also click the **Grid** button to enter multiple line items.
   Select **Modify Committed Line item** to make changes to an existing Budget BP line item. From the Commit Line Item Picker Window, select a line item and click **Select**.
6) Complete the Line Items form according to the Line Items table below.
7) Click **Add Cost**.

8) Select a cost code to associate with this cost item and click the **Select** button. You can distribute the total amount across multiple cost codes. Click the **Add Remaining** button to add the remaining amount to a cost code.
9) Click **Save** to save the Line Item. Unifier automatically calculates the aggregate value of the line items and displays the amount in Total Amount at the bottom of the record as well as in the Amount field in the upper form.
10) Click **Workflow Actions** and select from one of the following options:
    - **Close - Budget Change Rejected** — this selection will send the record to the End step.
    - **Cancel** — this selection takes the workflow to the End step.
    - **Owner Review** — this selection sends the record to the owner for review.
11) In **Action Details**, select who should receive the record.
    a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
    b. Select the user or group who will receive the task.
    c. Click **Add**.
    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.

Line Items

In this field	Do this
Cost Line Item Type	This is auto-populated based on the Line Item Type you selected.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Spend Category	Select a category from the drop-down menu.
Item Quantity*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the number of items specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Unit of Measure*	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the price of the item specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Amount	If the Cost Line Item Type is Lump Sum, then enter the total amount for this line item. This is a read-only field if the Cost Line Item Type is Unit Cost. It is auto-calculated using the formula Item Quantity x Item Unit Cost.
Costed Quantity	This a read-only field.

In this field	Do this
Not costed Amount	This a read-only field.
Costed Amount	This a read-only field.
Not Costed Quantity	This a read-only field.
P6 Activity	Select a P6 activity associated with this item.
P6 Planned Cost	This read-only field is based on the selected P6 activity.
P6 Planned Start	This read-only field is based on the selected P6 activity.
P6 Planned Finish	This read-only field is based on the selected P6 activity.
Contract No	This is a read-only field. It displays the contract number.
Contract Name	This is a read-only field. It displays the contract name
Change Order	This is a read-only field.

12)

Routing from the Owner Review Step

In this step of the workflow, you can either approve or reject the potential change request.

To route this record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Click **Workflow Actions** and select from one of the following options:
   - **Approve** — this selection will send the record to the End step.
   - **Reject** — this selection will send the record to the previous step.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.

c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.

Viewing the Potential Changes Record

This is the last step in the workflow. You cannot take action on this step. All form fields are read-only and the record is in a terminal status: Approved, Rejected, or Canceled. Once on the End step the record is viewable only in the business process log.

To view the Potential Changes record on the End step:

1) Go to your project and ensure that you are in User mode.
2) Click to expand the **Change Management** node.
3) Click **Potential Changes**. The Potential Changes log opens.
4) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.

Change Orders (Manually Created) Business Process

Purpose

You can use the Change Order business process to make a formal commitment change to a Budget Item record. You can see the change impact in the project's cost sheet.

Business process characteristics

This is a project-level, cost-type business process with line items and workflow. The Change Order business process uses the Payment Application schedule of values. An individual help file is available for this business process.

Record Statuses

- Quote_Received, a non-terminal status.
- Rejected_by_reviewer, a non-terminal status.
- Sent_for Revision, a non-terminal status.
- NTP_Issued, a non-terminal status.
- Awaiting Quotes, a non-terminal status.
- NTP Acknowledged, a terminal status.
- Not_Accepted_Closed, a terminal status.

Groups associated with this business process

- Creation: Project Coordinator, Subcontractors.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators, Subcontractors. All Project Users can be copied.
- Acceptance Acknowledgment: Project Coordinators, Subcontractors. All Project Users can be copied.
- Rejection Acknowledgment: Project Coordinators, Subcontractors. All Project Users can be copied.

Relationships associated with this business process

- The creator must select a contract (Budget Items) record.
- The business process auto-populates vendor information from the contract vendor selection.

Additional Information

- The Contracts- SOV becomes available upon association with a contract during record creation.
- The Change Order business process is enabled for integration.
- Enabled for integration.
- Enabled for publish path.

Files attached to base products' business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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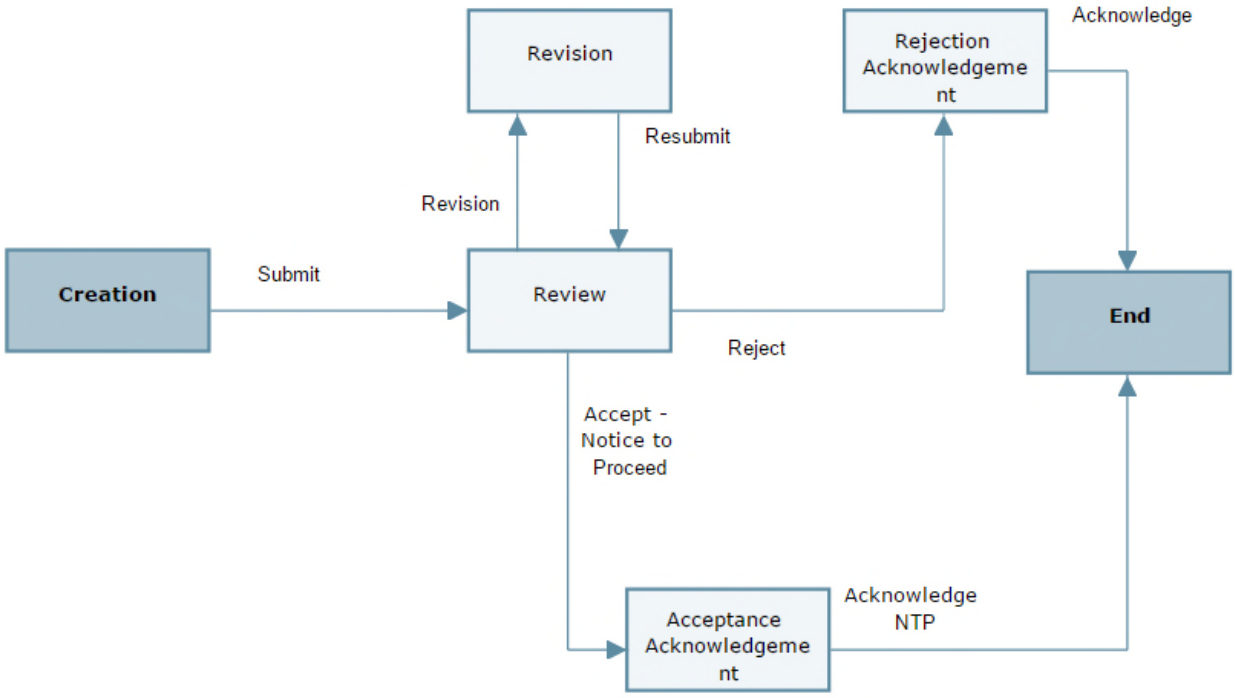
Change Orders (Manually Created) Workflow

Below are the steps in Change Orders (Manually Created) workflow.



Creating a Change Orders Record (Manually Created)

The first step in the Change Orders business process workflow is the Creation step.

To create a new Change Orders record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Change Management** node and select **Change Orders**.
3) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in the **Drafts** folder.
4) In the **Summary Items** section click **Add**.
   - Select **Lump Sum** to enter the change order as a lump sum amount.
   - Select **Unit Cost** to enter the change order separately for each item. You can only enter item quantity and item unit cost.
   - Select **Modify Committed Line item** to make changes to an existing Budget Items line item. From the Commit Line Item Picker Window select a line item and click **Select**.
5) Complete the Line Items form according to the Line Items table below.
6) Click **Add Cost**.

7) Select a cost code to associate with this cost item and click the **Select** button. You can distribute the total amount across multiple cost codes. Click the **Add Remaining** button to add the remaining amount to a cost code.
8) Click **Save** to save the Line Item. Unifier automatically calculates the aggregate value of the line items and displays the amount in Total Amount at the bottom of the record as well as in the Amount field in the upper form.
9) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.
10) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
11) In **Action Details**, select who should receive the record.
    a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
    b. Select the user or group who will receive the task on the Approval step.
    c. Click **Add**.
    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
    e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
12) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
Record Number	This is a read-only field that Unifier populates when you send the form to the Approval step.
Title*	This is a required field - Enter a title for the record.
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Transaction Currency	This is a read-only field that is auto-populated when you select the contract.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step in the routing.
Due Date	This is a read-only field. Due Date is pre-populated to reflect the number of days you have to finish routing the record. If the record becomes late, Unifier displays the record Title in bold red.

In this field	Do this
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Amount	This is an auto-calculated field that shows the total amount of the line items.
Project Currency Amount	This is an auto-calculated field that shows the total amount of the line items in project currency.
Contract/PO*	This is a required field - Select the contract for the change order from the drop-down menu. Selecting a contract activates the SOV button in the record tool bar.
Contract Name	This value is auto-populated from the contract.
Contract No	This value is auto-populated from the contract.
PO Description	This value is auto-populated from the contract.
Contract No	This is a read-only field - The contract number is auto-populated from the selected contract.
Reason*	This is a required field - Select a reason for the change from the drop-down menu.
Change Reason*	This is a required field - Enter a detailed reason, up to 4000 characters, for the potential change order.
Schedule Impact (Days)*	Enter the number of days this potential change order could affect the schedule.
Scope of Work*	This is a required field - Enter a detailed scope of work, up to 4000 characters, for the potential change order.
Vendor ID	This field is auto-populated from the Vendor record associated with the Contract record.
Vendor Name	This field is auto-populated from the Vendor record associated with the Contract record.
Contract Main Contact	Select a main contact for the Contract record.
Email	This field is auto-populated from the Vendor record associated with the Contract record.
Phone	This field is auto-populated from the Vendor record associated with the Contract record.
P6 Activity	Select a P6 activity to associate with this change order.
P6 Planned Cost	This is auto-populated based on the P6 activity you selected.
P6 Planned Start	This is auto-populated based on the P6 activity you selected.
P6 Planned Finish	This is auto-populated based on the P6 activity you selected.

Line Items

In this field	Do this
Cost Line Item Type	This is auto-populated based on the Line Item Type you selected.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Spend Category	Select a category from the drop-down menu.
Item Quantity*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the number of items specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Unit of Measure*	Select the Unit of Measure for the item specified on the line item line item
Item Unit Cost*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the price of the item specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Amount	If the Cost Line Item Type is Lump Sum, then enter the total amount for this line item. This is a read-only field if the Cost Line Item Type is Unit Cost. It is auto-calculated using the formula Item Quantity x Item Unit Cost.
Change Order #	This field is auto-populated with the change order number.
Reference	This is a read-only field. It references a potential change order.
Consolidated?	This is a read-only field. It displays if the potentials changes have been consolidated.
Costed Quantity	This a read-only field.
Not costed Amount	This a read-only field.
Costed Amount	This a read-only field.
Not Costed Quantity	This a read-only field.
P6 Activity	Select a P6 activity associated with this item.
P6 Planned Cost	This read-only field is based on the selected P6 activity.
P6 Planned Start	This read-only field is based on the selected P6 activity.
P6 Planned Finish	This read-only field is based on the selected P6 activity.
Contract No	This is a read-only field. It displays the contract number.
Contract Name	This is a read-only field. It displays the contract name

In this field	Do this
Change Order	This is a read-only field.

Routing from the Review Step

To route a record from the Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the Change Orders record and determine the appropriate course of action.
5) Click the Workflow Actions drop-down menu. The choices are:
   - **Revision** – this action keeps the workflow in flight and in Sent_for_Revision status.
   - **Reject** – This selection will send the record to the Rejection Acknowledgment step in Rejected status
   - **Accepted – Notice to Proceed** – This selection will send the record to Acceptance Acknowledgment step in NTP_Issued status
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send**.

Routing from the Revision Step

To route a record from the Revision step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the Upper form section you can change the following record details.
   - In the *General* block, you can revise the record **Title**.
   - In the *CO Information* block, most fields are editable except **Contract No** and **Revised Contract Completion Date** (auto-calculated based on the number of days of the schedule impact).
   - In the *Contract Summary* block, all fields are read-only and come from the contract or line items in this change order.
   - In the *Vendor Information* block, all fields are read-only and come from the vendor selected on the contract.
5) In the **Line Items** section you can Modify/Add/Delete Line Items as needed. You must complete all required fields on each line before you can save the Line Items form. Follow the same directions as adding line items during record creation. Changes to line items are reflected in the *Contract Summary* block of the Upper form.
6) Click **OK** to save the Line Items.
7) From the **Workflow Actions** drop-down menu, select **Resubmit**.
8) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
9) Click **Send**.

Routing from the Acceptance Acknowledgment Step

To route the record from the Acceptance Acknowledgment step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Review the Change Orders record
5) From the **Workflow Actions** drop-down menu, select **Acknowledged**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send**.

Routing from the Rejection Acknowledgment Step

To route the record from the Rejection Acknowledgment step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Review the Change Orders record
5) From the **Workflow Actions** drop-down menu, select **Acknowledged**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.

b. Select the user or group who will receive the task.
c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

7) Click **Send**.

Viewing a Change Orders (Manually Created) Record on the End Step

This is the last step in the workflow. You cannot take action on this step because the record is in a terminal status: Approved, Rejected, or Canceled. Once on the End step the record is viewable only in the business process log.

To view a record on the End step:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Change Management** node.
3) Click **Change Orders**. The Change Orders log opens.
4) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.
7) Click **SOV** to see the schedule of values.

Change Orders (Auto Created) Business Process

Purpose

You can use the Change Order business process to make a formal commitment change to a contract. You can see the change impact in the project's cost sheet. This business process is auto created by the Potential Changes business process.

Business process characteristics

This is a project-level, cost-type business process with line items and workflow. The Change Order business process uses the Payment Application schedule of values. An individual help file is available for this business process.

Record Statuses

- Awaiting_Quote, a non-terminal status
- Sent_for_Revision, a non-terminal status
- Rejected, a non-terminal status
- NTP_Issued, a non-terminal status
- Potential_CO, a non-terminal status.
- Declined_to_Respond, a non-terminal status
- Awaiting_Quote, a non-terminal status
- Clarification_Needed, a non-terminal status
- NTP_Acknowledged, a terminal status
- NTP_Accepted_Closed, a terminal status
- Canceled, a terminal status.

Groups associated with this business process

- Quote Preparation: Subcontractors. All Project Users can be copied.
- Clarification: Project Managers. All Project Users can be copied.
- Quote Revision: Subcontractors. All Project Users can be copied.
- Clarification: Subcontractors. All Project Users can be copied.
- Review: Project Managers. All Project Users can be copied.
- Scope and Price Definition: Project Coordinators. All Project Users can be copied.
- Subcontractor Review: Subcontractors. All Project Users can be copied.
- Revision: Subcontractors. All Project Users can be copied.

Relationships associated with this business process

This business process is auto created by the Potential Changes business process. It auto-populates vendor information from the contract (Budget Items) record.

Additional Information

- The Contracts-SOV becomes available upon association with a contract during record creation.
- The Change Order business process is enabled for integration.

- Enabled for integration.
- Enabled for publish path.

Files attached to base products' business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

Benefits

In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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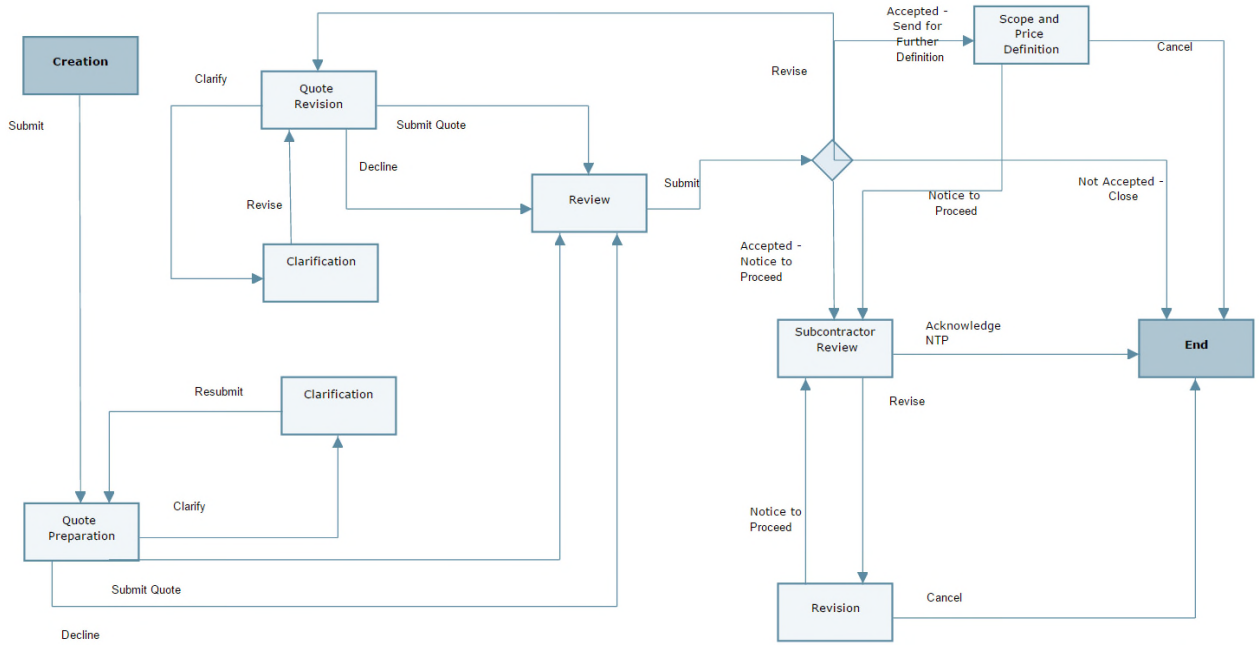
Change Orders (Auto Created) Workflow

Below are the four steps of the Change Orders (Auto Created) workflow.



Routing from the Quote Preparation Step

To route the record from the Quote Preparation step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) In the **Summary Items** section click **Add**.
   - Select **Lump Sum** to enter a Change Order as a lump sum amount.
   - Select **Unit Cost** to enter Change Order separately for each item. You can only enter item quantity and item unit cost.

- Select **Modify Committed Line item** to make changes to an existing Budget Items line item. From the Commit Line Item Picker Window select a line item and click **Select**.

5) Complete the Line Items form according to the Line Items table below.
6) Click **Add Cost**.
7) Select a cost code to associate with this cost item and click the **Select** button. You can distribute the total amount across multiple cost codes. Click the **Add Remaining** button to add the remaining amount to a cost code.
8) Click **Save** to save the Line Item. Unifier automatically calculates the aggregate value of the line items and displays the amount in Total Amount at the bottom of the record as well as in the Amount field in the upper form.
9) Click **OK** (if using the Line Item form), or **Save** (if using the grid) to save the form. The Line Items form closes.
10) Click **Workflow Actions** and select from one of the following options:
    - **Clarify** – this action will send the record to Clarification step in Clarification_Needed status.
    - **Decline** – This selection will send the record to the Review step in Declined_to_Respond status
    - **Submit Quote** - This selection will send the record to Review step in Potential_CO status
11) In **Action Details**, select who should receive the record.
    a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
    b. Select the user or group who will receive the task on the Approval step.
    c. Click **Add**.
    d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
    e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
12) Click **Send** to route the record.

Line Items

In this field	Do this
Cost Line Item Type	This is auto-populated based on the Line Item Type you selected.
Short Description*	This is a required field - Enter a brief description of the item specified on the line item.
Spend Category	Select a category from the drop-down menu.
Item Quantity*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the number of items specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Unit of Measure*	Select the Unit of Measure for the item specified on the line item line item

In this field	Do this
Item Unit Cost*	This is a required field if the Cost Line Item Type is Unit Cost. Enter the price of the item specified on the line item. This is a read-only field if the Cost Line Item Type is Lump Sum.
Amount	If the Cost Line Item Type is Lump Sum, then enter the total amount for this line item. This is a read-only field if the Cost Line Item Type is Unit Cost. It is auto-calculated using the formula Item Quantity x Item Unit Cost.
Change Order #	This field is auto-populated with the change order number.
Reference	This is a read-only field. It references a potential change order.
Consolidated?	This is a read-only field. It displays if the potentials changes have been consolidated.
Costed Quantity	This a read-only field.
Not costed Amount	This a read-only field.
Costed Amount	This a read-only field.
Not Costed Quantity	This a read-only field.
P6 Activity	Select a P6 activity associated with this item.
P6 Planned Cost	This read-only field is based on the selected P6 activity.
P6 Planned Start	This read-only field is based on the selected P6 activity.
P6 Planned Finish	This read-only field is based on the selected P6 activity.
Contract No	This is a read-only field. It displays the contract number.
Contract Name	This is a read-only field. It displays the contract name
Change Order	This is a read-only field.

Quote Preparation Clarification Step

To route a record from the Quote Preparation Clarification step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the Change Orders record and determine the appropriate course of action.
5) From the **Workflow Actions** drop-down menu, select **Resubmit**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send**.

Routing a Change Orders Record from the Review Step

To route a record from the Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the Change Orders record and determine the appropriate course of action.
5) From the **Review Decision** field, select a review decision.

6) From the **Workflow Actions** drop-down menu, select **Submit**. Based on your review decision, this record is either routed to the Scope and Pricing step, the Quote Revision step, or the Subcontractor Review step.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
8) Click **Send**.

Routing a Change Orders Record from the Subcontractor Review Step

To route a record from the Subcontractor Review step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the Change Orders record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. The choices are:
   - **Revise** – this action keeps the workflow in flight and in Sent_for_Revision status.
   - **Acknowledge – NTP** – This selection will send the record to Acceptance Acknowledgment step in NTP_Issued status
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.

c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

7) Click **Send**.

Routing the Change Orders from the Scope and Pricing Step

To route a record from the Scope and Pricing step:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the Change Orders record and determine the appropriate course of action.
5) Click the **Workflow Actions** drop-down menu. The choices are:
   - **Notice to Proceed** – this action will send the record to Subcontractor Review step in NTP_Issued status.
   - **Cancel** – his selection will send the record to the End step in Canceled status.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send**.

Routing the Change Orders from the Revision Step

To route a record from the Revision step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the *General* block, you can revise the record **Title**.
   - In the *CO Information* block, most fields are editable except **Contract No** and **Revised Contract Completion Date** (auto-calculated based on the number of days of the schedule impact).
   - In the *Contract Summary* block, all fields are read-only and come from the contract or line items in this change order.
   - In the *Vendor Information* block, all fields are read-only and come from the vendor selected on the contract.
4) Review the Change Order record and determine the appropriate course of action..
5) From the **Workflow Actions** drop-down menu, select **Resubmit**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send**.

Quote Revision Clarification Step

To route a record from the Quote Revision Clarification step:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the Change Orders record and determine the appropriate course of action.
5) From the **Workflow Actions** drop-down menu, select **Revise**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send**.

Viewing a Change Orders (Auto Created) Record on the End Step

his is the last step in the workflow. You cannot take action on this step because the record is in a terminal status: Approved, Rejected, or Canceled. Once on the End step the record is viewable only in the business process log.

To view a record on the End step:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Change Management** node.
3) Click **Change Orders**. The Change Orders log opens.
4) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.
7) Click **SOV** to see the schedule of values.

Financial Reporting

Cost Manager

The Cost Manager consists of the modules and features listed below.

- Cash Flow Curves — Cash flow is the distribution of cost over time; in other words, it is the movement of cash into or out of a project measured during a specific time period. Unifier displays this data using cash flow worksheets that can display baseline, spends, and forecast curves.
- Cost Sheets — Cost sheets capture data from data sources, such as cost code data values, budget, business processes by status, and manager sheets, for example Schedule Manager. Unifier dynamically updates the company cost sheet with information from project cost sheets.
- Funding Sheets — Funding sheets track company funding through allocation to, and consumption at, the project level.
- Schedules of Values — Unifier's Schedule of Values (SOV) feature provides a way to assemble information from contract, change order, and invoice and payment business processes into an SOV sheet, streamlining the process of invoicing for completed phases of a project. There are two types of SOVs: **Payment Application SOV** and **General Spends SOV**.

Cost rules affect how users can work with modules and features listed above.

- The **Budget** must be greater than 0 — This rule validates that a budget line item cannot be reduced below $0.
- The **Revised Budge**t must be greater than or equal to **Approved Commitments** — This rule validates revised budget (approved budgets, budget transfers and budget changes) vs approved commitments (approved contracts, change orders, purchase orders and po amendments)
- An **Invoice** must be less than or equal to **Approved Purchase Orders** and **PO Amendments** — This rule validates invoices (approved invoices) vs approved purchase orders (approved purchase orders and po amendments)
- A **Payment Application** must be less than **Approved Contracts** and **Change Orders** — This rule validates approved payment applications vs approved commitments (approved contracts, change orders)

The actions that can trigger a rule are:

- You attempt to "send" a business process record to the next step whose status activates the rule.
  - For example, the rule may be designed to activate when a record gets to the Pending or Approved status.
- Data is loaded into a cost sheet manually.
- Web services calls create records.
- Records are auto-created from other records.

For more details about the following information refer to the *Unifier User Guide*.

- Defining the budget
- Work packages

- Worksheets
- Company cost sheet
- Funding Manager

Project Design

Architect's Supplemental Instructions Business Process

Purpose

Distribute instructions or design related changes to the project team.

Characteristics

This is a Project level business process with a workflow. It is available only in the owner template.

Groups associated with this business process

- **Creation**: Architects/Engineers
- **Review**: Project Manager. All Project Users can be copied.
- **Revision**: Architects/Engineers. All Project Users can be copied.

Record Statuses

- **Pending**: non-terminal status
- **Approved**: terminal status
- **Rejected**: terminal status
- **Canceled**: terminal status

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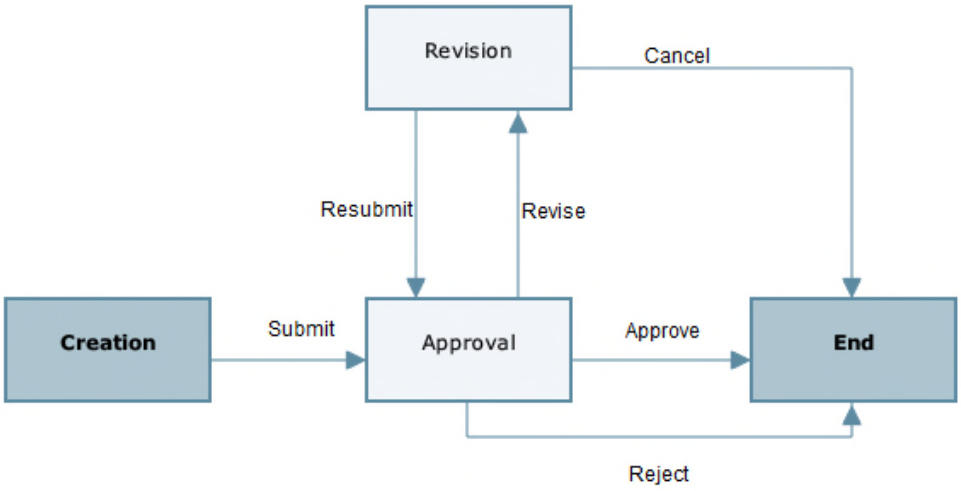
Architect's Supplemental Instructions Business Process Workflow

The following diagram shows the four steps of the Architect's Supplemental Instructions workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select Resubmit for Approval, the record moves to the Approval step with a record status of Pending. Sending a record to either the Revision step or the Approval step creates a task for the record recipient.



Creating Architect's Supplemental Instructions Record

Create an Architect's Supplemental Instructions record in the Tasks log to initiate and accept/reject a new Architect's Supplemental Instructions request.

In the Architect's Supplemental Instructions form, provide detailed instructions and attach related documents. After completing the Architect's Supplemental Instructions form, select an action in the Workflow Actions list to determine the next step in the workflow. Click Send to route the form to the next assignee.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Project Design** node.
3) Select **Architect's Supplemental Instructions**.
4) From the BP log page, click **Create**. Refer to the tables below to complete the form. You can click **Save** at any time to save a draft version of the form. The drafts are stored under **Drafts**.
5) Click **Add Attachment**, select **Unifier Folder**, select a file, and click **OK**. The **Attachments** link indicates (1) file is attached to the record.
6) After completing the form, select **Submit** from the **Workflow Actions**.
7) On the **Action Details** tab, select who should receive this action item.
8) Click **Send**. When the **Notification** window opens, review the content and click **OK**. The record now moves to the next step in the workflow.

General

In this field:	Do this:
Record Number	No action.
Title	(Required) Enter a title.
Project Number	No action.
Project Name	No action.
Creator	No action.
Creation Date	No action.
Due Date	No action.
Status	No action.
Contract Reference	Select a contract record from the list.
Bulletin Number	Enter a bulletin number.
Schedule Impact	Select if this causes a schedule impact.
Cost Impact	Select if this causes a cost impact.
Instructions	Enter if instructions are provided.
Drawings	Enter drawings are provided.
Specification Section	Select a specification section.
Specifications	Enter if specifications are provided.

Revising Architect's Supplemental Instructions Record

To revise an Architect's Supplemental Instructions record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) Select the Architect's Supplemental Instructions record sent to you for revision.
4) Review the record and click **Accept Task**.
5) Fill out the form according to your needs.
6) From the **Workflow Actions** list, select **Revise**.
7) Click **Send** to route the record for approval and then click **OK**.

Approving Architect's Supplemental Instructions Record

To approve an Architect's Supplemental Instructions record:

1) Navigate to the **Tasks** log in your project.
2) Click **Tasks** and open an **Architect's Supplemental Instructions** task record that was sent for approval.
3) Review the record and click **Accept Task**.
4) Click **Attachments**, select a file, click **Download** or **View**, and click **Close Window**.
5) From the **Workflow Actions** list select **Approve**.
6) Click **Send** to conclude the approval process.

Viewing Closed Architect's Supplemental Instructions Record

When the record is at the **End** step, the record is in terminal status which means that the record has been: **Approved, Rejected,** or **Canceled**. You can also open a closed **Architect's Supplemental Instructions** record to see who has reviewed the record and at which step.

To view the closed Architect's Supplemental Instructions record:

1) Go to your project and ensure that you are in User Mode.
2) Navigate to the **Project Design** node and click to expand.
3) Click **Architect's Supplemental Instructions**.
4) Select the appropriate line item (a closed Architect's Supplemental Instructions record) from the list and open the record.
5) From the **Task Details**, click **Click here** to open the **BP Progress** window. The **BP Progress** window shows that the submittal is on the **End** step.
6) Click **View Graphic** to open the workflow graphic showing tasks steps and links. The current step (**End**) is highlighted.
7) Click **Close Window**, click **Close**, and click **Close Window** to finish viewing a closed record.

Architect or Engineer Daily Observations Business Process (Owner Project Only)

Purpose

Record an architect's or engineer's daily structural observations at a site.

Characteristics

This is a Project level business process with a workflow. It is available only in the owner template.

Groups associated with this business process

- **Creation**: Architects/Engineers
- **Review**: Project Manager. All Project Users can be copied.
- **Revision**: Architects/Engineers. All Project Users can be copied.

Record Statuses

- **Pending**: non-terminal status
- **Approved**: terminal status
- **Rejected**: terminal status
- **Canceled**: terminal status

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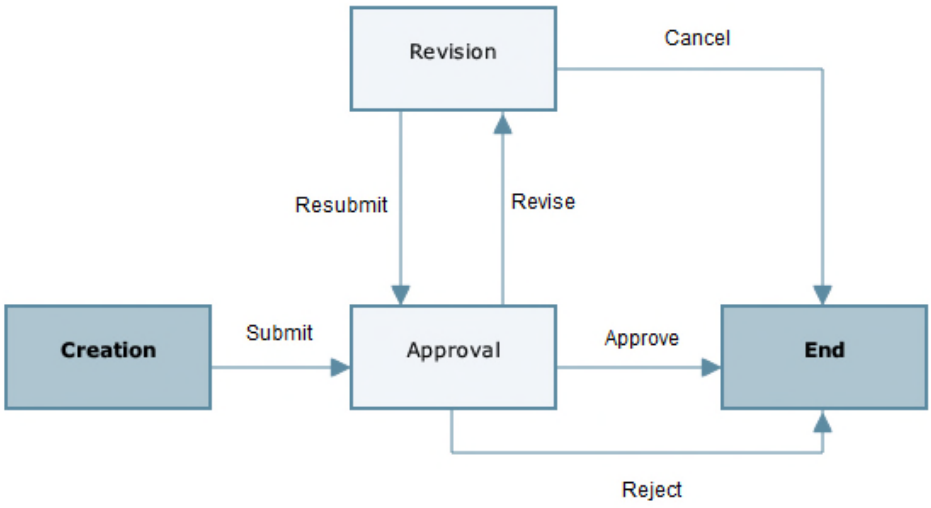
Viewing Closed Architect or Engineer Daily Observations Record 372

Architect or Engineer Daily Observations Business Process Workflow

The following diagram shows the four steps of the Architect/Engineer Daily Observations workflow. The action you take on a step determines the record status on the next step. For example, if on the Revision step you select Cancel Daily Observation, the record moves to the End step with a record status of Canceled. Sending a record to either the Approval step or the Revision step creates a task for the record recipient.



Creating Architect or Engineer Daily Observations Record

Create an Architect/Engineer Daily Observations record to initiate and accept/reject a new Architect/Engineer Daily Observations request. You can attach files such as drawings and specifications to the record for reference purposes.

To create a new Architect/Engineer Daily Observation record:

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Project Design** node.
3) Select **Architect/Engineer Daily Observation**.
4) From the BP log page, click **Create**.Refer to the tables below to complete the form. You can click **Save** at any time to save a draft version of the form. The drafts are stored under **Drafts**.
5) Click **Add Attachment**, select **Unifier Folder**, select a file, and click **OK**. The **Attachments** link indicates (1) file is attached to the record.
6) After completing the form, select **Submit** from the **Workflow Actions**.
7) On the **Action Details** tab, select who should receive this action item.
8) Click **Send**. When the **Notification** window opens, review the content and click **OK**. The record now moves to the next step in the workflow.

General

In this field:	Do this:
Record Number	No action.
Title	(Required) Enter a title.
Project Number	No action.
Project Name	No action.
Creator	No action.
Creation Date	No action.
Due Date	No action.
Status	No action.
Contract Reference	Select a contract record from the list.

Report Summary

In this field:	Do this:
Structural Observer	Enter the name of the observer.
Observation Period From	Select the start date of observation
Phone	Enter the phone number of the observer.
Observation Period To	Enter the end date of the observation

Daily Observation

In this field:	Do this:
Observed Structural Elements	List the observed structural elements and their connections.
Location	Enter the location of the building.

Observed Deficiencies

In this field:	Do this:
Deficiencies	Record any structural deficiencies.

Revising Architect or Engineer Daily Observations Record

To revise an Architect/Engineer Daily Observation record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.

3) Select the Architect/Engineer Daily Observation record sent to you for revision.
4) Review the record and click **Accept Task**.
5) Update the form.
6) From the **Workflow Actions** list, select **Resubmit**.
7) Click **Send** to route the record for approval and then click **OK**.

Approving Architect or Engineer Daily Observations Record

To approve an Architect/Engineer Daily Observations record:

1) Navigate to the **Tasks** log in your project.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
3) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Select a task, open and review the content
4) Click **Attachments**, select a file, click **Download** or **View**, and click **Close Window**.
5) Click **Accept Task**.
6) From the **Workflow Actions** list select **Approve**.
7) Click **Send** to conclude the approval process.

Viewing Closed Architect or Engineer Daily Observations Record

To view the closed Architect/Engineer Daily Observations record:

1) Go to your project and ensure that you are in **User Mode**.
2) Navigate to the **Project Design** node and click to expand.
3) Click **Architect/Engineer Daily Observations**.
4) Select the appropriate line item (a closed Architect/Engineer Daily Observations record) from the list and open the record.
5) From the **Task Details**, click **Click here** to open the **BP Progress** window.
6) Click **View Graphic** to open the workflow graphic showing tasks steps and links. The current step (**End**) is highlighted.
7) Click **Close Window**, to finish viewing a closed record.

Design Reviews Business Process

Purpose

Track design evaluations during the design phase.

Characteristics

This is a Project or Shell level business process with a workflow. The Design Reviews log stores all design review records.

Roles

Architect or engineer can create, revise, and submit design review records for approval and cancel reviewed records. The role of the project manager is to review, approve, cancel or reject the design review records.

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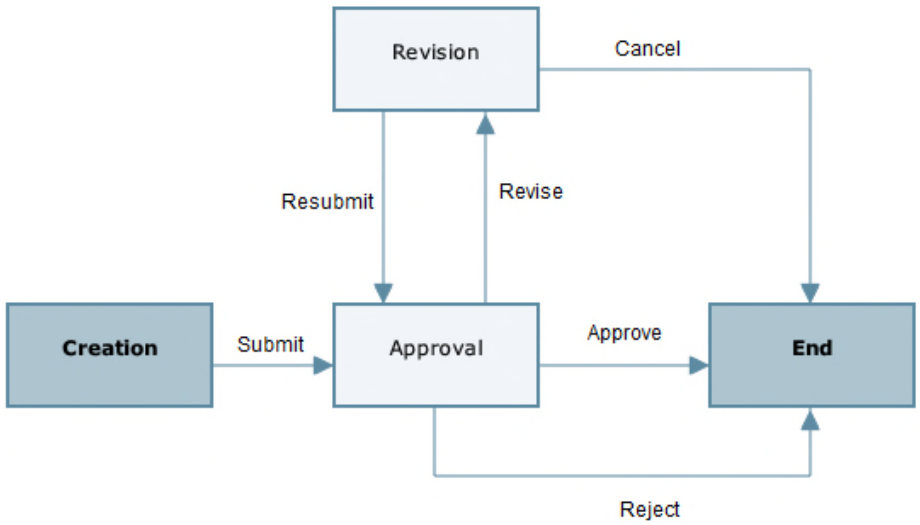
Reviewing Design Reviews Record 374
Approving Design Reviews Record 375
Viewing Closed Design Reviews Record 375

Design Reviews Workflow

The following diagram shows the four steps of the Design Review workflow. The action you take on a workflow step determines the business process record's status on the next step. For example, if you select Resubmit for Approval on the Revision step, the record moves to the Approval step with a record status of Pending. Sending a record to the next step creates a task for the assignee, except on the End step.



Creating a Design Reviews Record

Create a Design Reviews record in the Tasks log to initiate and accept/reject a new design reviews approval request.

Provide general information, such as the materials shipped and the delivery format, in the Design Reviews form. In the Line Items section, attach documents related to the design review. Documents may be reviewed during the approval process. After completing the Design Reviews form, select an action in the Workflow Actions list to determine the next step in the workflow. Click Send to route the form to the next assignee.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Project Design** node.
3) Click **Design Reviews**.
4) From the BP log page, click **Create**.(Required) In the **Title** field, enter a title.
5) Click the **Design Review** tab to expand it.
6) In the **Summary** field, enter a description and proceed to add attachments that need to be reviewed and approved (to be used) in the project.
7) Click the **Line Items** tab and click **Add**.
8) Click **Attachment** and then click **Add Attachment**.
9) Select the **Unifier Folder** source > **folder** > **Structural**.
10) Select a file and click **OK**.
11) From the **Discipline** list, select **Structural**.
12) From the **Line Item Status** list, select **Open**, and click **OK** to attach the file to your record.
13) From the **Workflow Actions** list, select **Submit**.
14) On the **Action Details** tab, click **To**, select and add an assignee, click **Add**, and click **OK**.
15) Click **Send** to route the record for approval and then click **OK**.

Reviewing Design Reviews Record

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) Click record that you want to review.
4) Click **Design Review** tab to expand and review the contents.
5) Select the appropriate line item from the list and click **Download**.
6) Click **Open** to open the document, review the content, and click **Save** to save the file.
7) Click **Accept Task**.
8) In the **Action Details** tab click the **Task Notes**, enter notes, and click **Ok** when finished.

9) From the **Workflow Actions** list select **Revise** and click **Send** to finish reviewing the record.

> **Note:** The **Design Reviews** record is no longer listed in the **Tasks** log because the record was forwarded to another assignee for revision.

Approving Design Reviews Record

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) Click the record that was sent for approval.
4) View the record status and click task status: **Not Started**.

> **Note:** In the current workflow step, Approval is indicated in **bold**. You can select a step to view which assignees performed tasks for that step.

5) Click the **Revision** step and click **View Graphic** to open the workflow graphic showing tasks steps and links. The current step is highlighted.
6) Click **Close Window**.
7) Click **Accept Task** and view the line items related to your **Design Reviews** record.
8) Click the **Line Items** tab, select a file, and click **Download**.
9) Click **Open** to open the document, review the content, and click **Save** to save the file.
10) From the **Workflow Actions** list select **Approve**.
11) Review the changes in **Action Details**.

> **Note:** The Action taken is **Approve** and the **To** option is disabled. No assignees are present because the system routed the record to the **End** step.

12) Click **Send** to conclude the approval process.

Viewing Closed Design Reviews Record

You can view a closed **Design Reviews** record in the **Design Reviews** business process log. When a record is at the **End** step, the record is in terminal status which means that the record has been: **Approved, Rejected,** or **Canceled**.

You can also open a closed **Design Reviews** record to see who has reviewed the record and at which step.

1) Go to your project and ensure that you are in **User Mode**.
2) Navigate to the **Project Design** node and click to expand.
3) Click **Design Review** tab to expand and review the contents.

4) Select the appropriate line item (a closed Design Reviews record) from the list and open the record.
5) From the **Task Details**, click **Click here** to open the **BP Progress** window. The **BP Progress** window shows that the submittal is on the **End** step.
6) Click **View Graphic** to open the workflow graphic showing tasks steps and links. The current step (**End**) is highlighted.
7) Click **Close Window**, click **Close**, and click **Close Window** to finish viewing a closed record.

Design Change Request Business Process (Owner Project Only)

Purpose

Record requests for adjustments during the design phase of a project.

Characteristics

This is a Project-level business process with a workflow. It is available in both the Owner and General Contractor templates.

Groups Associated with this Business Process

Contractor creates, submits, and updates documents for review, and cancels reviewed documents. The role of the project manager or architect/engineer is to review, approve, cancel, or reject the Design Change Request documents.

Record Statuses

- **Open**: A non-terminal status.
- **Closed**: A terminal status.
- **Awaiting _Review**: A non-terminal status
- **Awaiting_Assignment**: A non terminal status
- **Canceled**: A terminal status.

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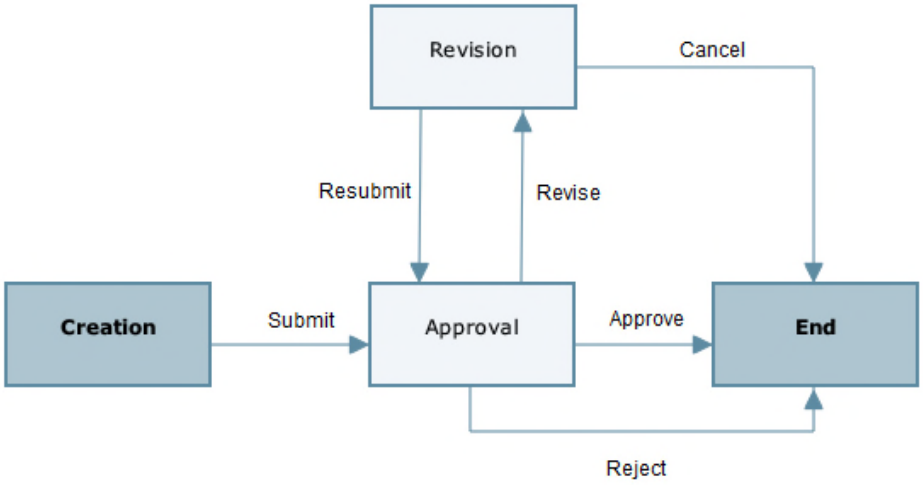
Creating a Design Change Request Record 378
Approving a Design Change Request Record 379
Revising a Design Change Request Record 379
Viewing a Closed Design Change Request Record 379

Design Change Request Business Process Workflow

The following diagram shows the four steps of the Design Change Request workflow. The action you take on a workflow step determines the business process record's status on the next step. For example, if you select Resubmit for Approval on the Revision step, the record moves to the Approval step with a record status of Pending. Sending a record to the next step creates a task for the assignee, except on the End step.



Creating a Design Change Request Record

Create a Design Change Request record in the Tasks log to initiate and accept/reject a new design change request.

Provide a description, reason and impact of the proposed change.

After completing the Design Change Request form, select an action in the Workflow Actions list to determine the next step in the workflow. Click Send to route the form to the next assignee.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Expand the **Project Design** node.
2) Click **Design Change Requests**.
3) From the BP log page, click **Create**.(Required) In the **Title** field, enter a title.
4) In the **Contract Reference** field, click **Select** and select a contract.
5) Click **Open** to open the contract and add details about the design change.
6) In the **Change Description** field, enter a description.
7) In the **Justification** field, enter a description.
8) In the **Project Impact** field, enter a description.
9) From the **Document Type** list, select **Design Documents**.
10) From the **Workflow Actions** list, select **Submit**.
11) Click **Send** to route the record for approval and then click **OK**.

Approving a Design Change Request Record

1) Navigate to the **Tasks** log in your project.
2) Open the **Design Change Request** record that was sent for approval.
3) View the record status and click **Accept Task**.
4) From the **Workflow Actions** list select **Approve Design Change**.
5) Click **Send** to conclude the approval process.

Revising a Design Change Request Record

1) Navigate to the **Tasks** log in your project.
2) Open a **Design Change Request** task.
3) Click **General Comments**, review comments, and click **Cancel**.
4) Click **Accept Task**.
5) From the **Workflow Actions** list, select **Resubmit for Approval**.
6) Click **Send** to route the record for approval and then click **OK**.

Viewing a Closed Design Change Request Record

You can view a closed **Design Change Request** record in the **Design Change Request** business process log.

When the record is at the **End** step, the record is in terminal status which means that the record has been: **Approved, Rejected,** or **Canceled**.

You can also open a closed **Design Change Request** record to see who has reviewed the record and at which step.

1) Go to your project and ensure that you are in **User Mode**.
2) Navigate to the **Project Delivery** node and click to expand.
3) Click **Design Change Request** tab to expand and review the contents.
4) Select the appropriate line item (a closed Design Change Request record) from the list and open the record.
5) From the **Task Details**, click **Click here** to open the **BP Progress** window. The **BP Progress** window shows that the submittal is on the **End** step.
6) Click **View Graphic** to open the workflow graphic showing tasks steps and links. The current step (**End**) is highlighted.
7) Click **Close Window**, click **Close**, and click **Close Window** to finish viewing a closed record.

Submittal Manager

Submittal Packages Business Process

Purpose

Use the Submittal Packages business process to group submittals into packages. From the Submittal Packages log, you can view the number of required submittals, the number of approved submittals, the planned start and finish dates, the vendor who will be providing the submittal, and the associated contract.

Characteristics

This is a project level non-workflow business process with submittal line items.

Roles

Submittal Coordinators can create and edit a submittal package.

Additional Information

Enabled for custom print.

In This Section

Creating a Submittal Package Record 381
Adding a Submittals Record to the Submittal Package Record 382

Creating a Submittal Package Record

Use the Submittal Package business process to create a submittal package and associate submittals to the package.

1) Go to your project. Ensure that you are in User Mode.
2) Expand the **Submittal Manager** node.
3) Click **Submittal Packages**.
4) From the BP log page, click **Create**.Refer to the tables below to complete the form.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

5) Click **Save**.
6) From the **Submittals** tab, click **New** to add submittals to the package. The Submittal form opens. For more information on completing this form, see topic *Creating a Submittals Record*.
7) Click **Finish Editing**.

In this field:	Do this:
Submittal Package Title*	Enter a title. This is a required field.
Submittal Package #*	Select a package #. This is a required field.
Status	Select a status. This is a required field.
Contract	Click **Select** to open the Contract window. Click to select a contract and click **Open** to select the contract. The selected contract name appears in the Contract field.
Schedule Activity	Select a P6 activity.
Submittal Package Scope Details	Enter the package scope details.

Adding a Submittals Record to the Submittal Package Record

To add Submittal records to a Submittal Package record:

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Submittal Manager** node.
3) Click **Submittal Packages**.
4) Open a Submittal Package record.
5) From the toolbar, click **Edit**.
6) From **Submittals** tab, click **New**. The **Submittal** form opens. For more information on completing this form, see topic *Creating a Submittals Record*.
7) Click **Finish Editing.**

> **Note:** You must enter a value in all required fields (*) before you can save the form.

Submittals Business Process

Purpose

Submittals are documents that track items that are produced by an outside supplier or subcontractor and are delivered to a contractor for use in a project. From the Submittals log, you can view the type of submittal, the number of submittal revisions, the latest revision number of the submittal, if it has been released, who it is assigned to and who submitted the record, the approval decision, the associated submittal package number and title, the planned start and finish dates, the contract name and number.

Characteristics

This is a project level non-workflow business process with line items.

Groups associated with this business process

Submittal Coordinators can create or edit submittal records.

Record Statuses

Pending or Completed

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Creating a Submittals Record

To create a Submittal Record:

1) Go to your project. Ensure that you are in User Mode.
2) Expand the **Submittal Manager** node.
3) Click **Submittals**.
4) From the BP log page, click **Create**. Refer to the tables below to complete the **General**, **Submittal Details**, **Related Submittal Package Details**, **Other Information About This Submittal**, **Contract Details**, and the **Related Schedule Activity** sections of the form.
5) From the **Revision** tab, click **Add** to manually create a Submittal Revisions record. If the field **Release Submittal?** is set to **Yes**, the system auto-creates a Submittal Revision record. Refer to the topic *Submittal Revisions Business Process* for more information on the submittal revision workflows.
6) To save the record, click either:
   - **Finish Editing** to save the form in read-only mode. You can return the record to edit mode by clicking **Edit** on the record tool bar.
   - **Save** to leave the form in edit mode.

Note: You must enter a value in all required fields (*) before you can save the form.

General

In this field:	Do this:
Record Number	No action.
Project Name	No action.
Project Number	No action.
Creator	No action.
Creation Date	No action.
Due Date	No action.
Status	This is a required field. Select the status (Pending or Completed).

Submittal Details

In this field	Do this
Submittal Title*	This is a required field. Enter a title for the submittal record
Submittal Identifier	This is a read only field. It displays concatenated value of Submittal Package # and Submittal ID – Segment.
Submittal ID - Suffix	Enter a suffix for this Submittal ID.
Submittal Type	This is not a required field. Select the submittal type from the pull down list.
Release Submittal?	Select **Yes** if you want to release the submittal. The system will auto create a Rev 1 of this submittal, which will go through the Submittal Revisions workflow.
Submittal Release Date	No action.
Total # of Revisions	No action
Revision Sequencing*	This is a required field. Select revision sequencing from the Submittal Revision Sequencer window.

Related Submittal Package Details

In this field	Do this
Submittal Package Record #	Select the Submittal Package that this Submittal belongs to.
Submittal Package Title	No action

In this field	Do this
Submittal ID - Package #	No action.

Other Information About This Submittal

In this field	Do this
Scope/Requirement Details	Enter any scope or requirements information associated with this submittal.

Contract Details

In this field	Do this
Contract Reference	Select the Contract associated with this submittal.
Contract No	No action
Contract Name	No action.

Related Schedule Activity

In this field	Do this
P6 Activity	Select the P6 activity associated with this submittal.
P6 Planned Start	No action
P6 Planned Finish	No action.

Editing a Submittals Record

To edit a submittals record:

1) Go to your project. Ensure that you are in User Mode.
2) Expand the **Submittal Manager** node.
3) Click **Submittals**.
4) From the **Submittals** log, open the record you want to revise.
5) Click **Edit** and make the necessary changes.
6) Click **Finish Editing**.

Submittal Revisions Business Process

Purpose

Use the Submittals Revisions business process to view and manage multiple submittal revisions. Submittal Revision records are auto created until a revision is approved.

Characteristics

This is a project level workflow business process with documents. Submittal Revisions log stores submittal revision documents and their status.

Groups associated with this business process

- Creation Step: Submittal Coordinators
- Assignment Step: Submittal Coordinators, All Project Users group can be copied.
- Preparation of Submittal: Sub Contractors and Architects/Engineers, All Project Users group can be copied.
- Coordinator Review: Submittal Coordinators, All Project Users group can be copied.
- SME Review: Discipline Leads, All Project Users group can be copied.
- Customer Review: Customer, All Project Users group can be copied.
- Coordinator Notification: Submittal Coordinators, All Project Users group can be copied.
- Submitter Rejection Notification: Submittal Coordinators, All Project Users group can be copied.
- Submitter Approval Notification: Submittal Coordinators, All Project Users group can be copied.

Record Statuses

- Awaiting_Assignment, a non-terminal status.
- Submittal_Prep, a non terminal status.
- Coordinator_Review, a non terminal status.
- SME_Review, a non terminal status.
- Customer Review, a non terminal status.
- Reject_Acknowledge, a terminal status.
- Approved_Acknowledge, a terminal status.
- Completed, a terminal status.

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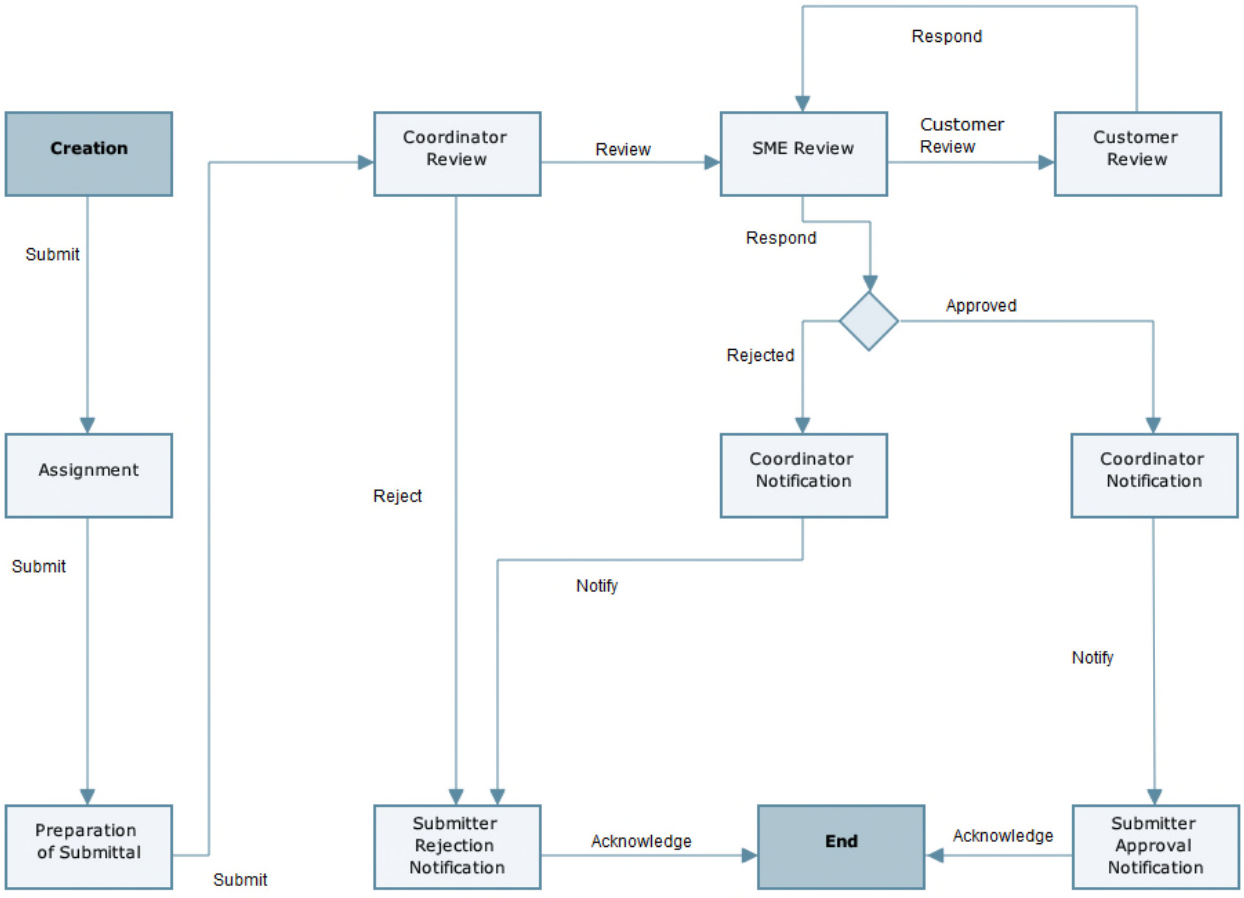
Routing from the Preparation of Submittal Step 389
Routing from the Coordinator Review Step 390
Routing from the SME Review Step 391
Routing from the Customer Review Step 392
Routing from the Coordinator Notification Step 392
Routing from the Submitter Approval Notification Step 393
Routing from the Submitter Rejection Notification Step 394
Reviewing a Submittal Revision Record on the End Step 395

Submittal Revisions Workflow



Routing from the Assignment Step

To assign a submittal to a subcontractor:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on this step.
   - You can add notes for the next step, but you cannot view previous notes.
   - If you want to revisit notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the record and determine the appropriate course of action.
5) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the **Review** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send** to route the record to the Preparation of Submittal step. Unifier displays a message stating that the record has been submitted successfully.

Routing from the Preparation of Submittal Step

After you have finished preparing the submittal, you can route it to the Coordinator Review step for review.

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on this step.
- You can add Notes for the next step, but you cannot view previous Notes.
- If you want to revisit Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Review the record and determine the appropriate course of action
5) Click **Add Attachment** to include any files with this submittal.
6) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications** .
8) Click **Send** to route the record to the Coordinator Review step. Unifier displays a message stating that the record has been submitted successfully.

Routing from the Coordinator Review Step

As the Submittal Coordinator you can decide to move this record to the SME review step for review, or reject the submittal. If the Submittal is rejected, a second revision of this submittal is auto created and will follow the same workflow as the first.

1) Go to your project. Ensure that you are in User Mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on this step.
   - You can add notes for the next step, but you cannot view previous notes.

- If you want to revisit Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) In **Workflow Actions** select the workflow action to take:
   - **Review**: Sends it to the SME Review step.
   - **Reject**: Sends the record to the Submitter Rejection Notification step and to the End step.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
6) Click **Send** to route the record to the next step. Unifier displays a message stating that the record has been submitted successfully.

Routing from the SME Review Step

As the SME reviewer, you can decide to respond to the submittal by selecting your approval decision, or you can send the submittal for customer review and approval.

1) Go to your project and ensure that you are in **User Mode**.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the **Approval Decision** field, select a code and click **Select**.
5) In **Workflow Actions** select the workflow action to take.
   - **Respond:** This will route the record based on your approval decision.
   - **Customer Review:** This will route the record to the Owner Review step.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.

d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

7) Click **Send** to route the record. Unifier displays a message stating that the record has been submitted successfully.

Routing from the Customer Review Step

To route the record from the Customer Review step:

1) Go to your project and ensure that you are in **User Mode**.
2) Click on **Tasks**.
3) From the **Tasks** log:

- Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.

4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. When ready, click **Accept Task**. The View form dynamically changes to an Action form.
5) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Respond**. This action sends the record back to the SME Review step.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send** to route the record. Unifier displays a message stating that the record has been submitted successfully.

Routing from the Coordinator Notification Step

In this step of the workflow, the record follows the path based on the approval decision. It is either routed to the Submitter Rejection Notification step or the Submitter Approval Notification step.

1) Go to your project. Ensure that you are in User Mode.

2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on this step.
   - You can add notes for the next step, but you cannot view previous notes.
   - If you want to revisit notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) In **Workflow Actions**, select **Notify.**
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the **Review** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
6) Click **Send** to route the record to the next step. Unifier displays a message stating that the record has been submitted successfully.

Routing from the Submitter Approval Notification Step

To route the record from the Submitter Approval Notification step:

1) Go to your project and ensure that you are in **User Mode**.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. When ready, click **Accept Task**. The View form dynamically changes to an Action form.
5) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Acknowledge**. This action sends the record back to the End step.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send** to route the record. Unifier displays a message stating that the record has been submitted successfully.

Routing from the Submitter Rejection Notification Step

To route the record from the Submitter Rejection Notification step:

1) Go to your project and ensure that you are in **User Mode**.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. When ready, click **Accept Task**. The View form dynamically changes to an Action form.
5) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Acknowledge**. This action sends the record back to the End step.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.

7) Click **Send** to route the record. Unifier displays a message stating that the record has been submitted successfully.

Reviewing a Submittal Revision Record on the End Step

1) Go to your project. Ensure that you are in User mode.
2) Click to expand the **Submittal Manager** node.
3) Click **Submittal Revisions**. The Submittal Revisions log opens.
4) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.

RFI Manager

Requests for Information Business Process (Owner Project Only)

Purpose

This business process is used for collaboration and exchange of information.

Characteristics

This is a Project or Shell level workflow business process

Groups associated with this business process

- Creation: Subcontractors, Architects/Engineers
- Clarification: Subcontractors, Architects/Engineers. All Project Users can be copied on this step.
- Coordination: RFI Coordinators. All Project Users can be copied on this step
- Acceptance: Subcontractors, Architects/Engineers. All Project Users can be copied on this step.
- Technical Review: Discipline Leads. All Project Users can be copied on this step.
- Review: Project Manager. All Project Users can be copied on this step

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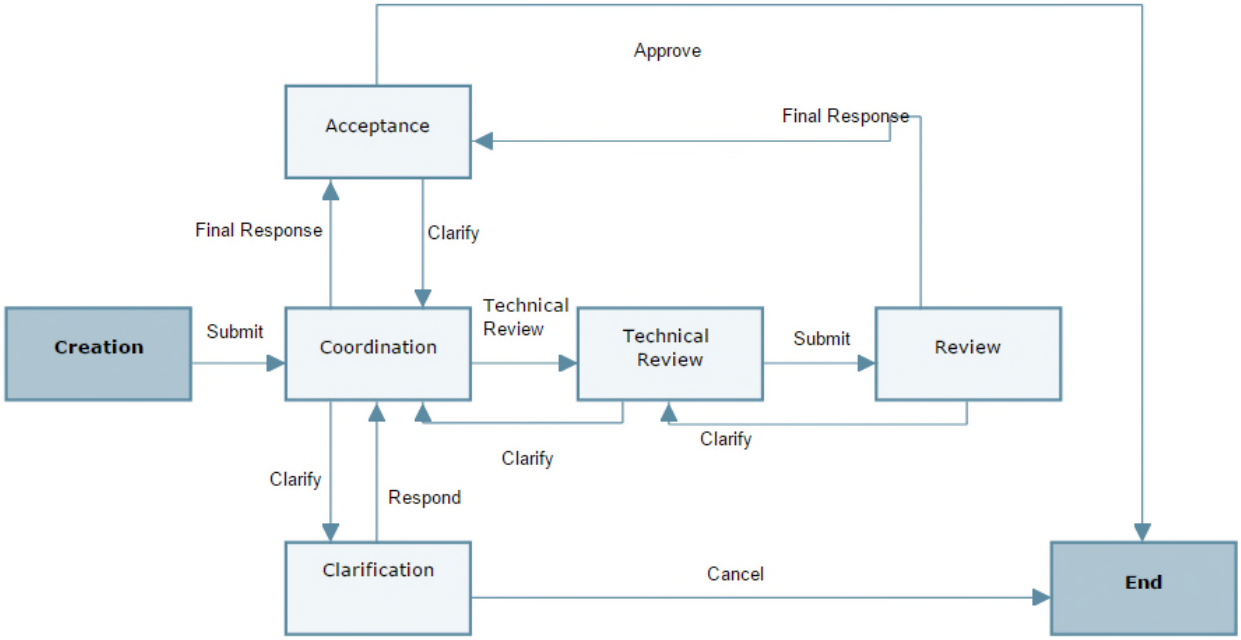
Requests for Information Business Process Workflow

The following diagram shows the seven steps of the RFI business process workflow.



Creating RFI

1) Go to your project and ensure that you are in **User Mode**.
2) Expand the **RFI Manager** node.
3) Click **Requests for Information**.
4) From the BP log page, click **Create**.From **Request for Information** tab, in the **Title** field (Required), enter a name for the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

5) Complete the form accordingly.
6) When finished, from **Workflow Actions** list select **Submit**.
7) Click **Send**. The names of the recipients appear in the **To** field automatically.

Coordinating RFI

1) Click on **Tasks**.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.

3) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. From **Workflow Actions** list select the required action. Your options are: **Technical Review**, **Clarify**, or **Final Response**.
4) Click **Send** to send your clarification request.

Clarifying RFI

1) Click on **Tasks**.
2) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.

3) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Click **Accept Task** to open the **RFI** window with the **Action Details** tab and complete the form accordingly.
4) From **Workflow Actions** list select the required action. Your options are: **Respond** or **Cancel**.
5) Click **Respond with Clarification**. The names of the recipients appear in the **To** field automatically.
6) Click **Send** to send your clarification response.

Acceptance Request

1) Click on **Tasks**.
2) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.

3) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. From **Workflow Actions** list select the required action. Your options are: **Clarify** or **Approve**.
4) Click **Send for Technical Review**. The names of the recipients appear in the **To** field automatically. **Technical Review** is highlighted in the Send For field.

5) Click **Send** to send the RFI for Technical Review.

Sending for RFI for Review

1) Click on **Tasks**.
2) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
3) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. From **Workflow Actions** list select the required action. Your options are: **Final Response** or **Clarify**.
4) Click **Submit Response**. The names of the recipients appear in the **To** field automatically. **Review** is highlighted in the Send For field.
5) Click **Send** to send the RFI for Review.

Request for Information (RFI) Business Process

Purpose

A process for contractors to clarify designs, specifications, and instruction.

Characteristics

This is a Project or Shell level workflow business process

Groups associated with this business process

- Creation: Project Manager and Project Coordinators
- Owner Review: Customer. All Project Users can be copied on this step.
- Contractor Review: Project Manager and Project Coordinators. All Project Users can be copied on this step
- Owner Review: Customer. All Project Users can be copied on this step.

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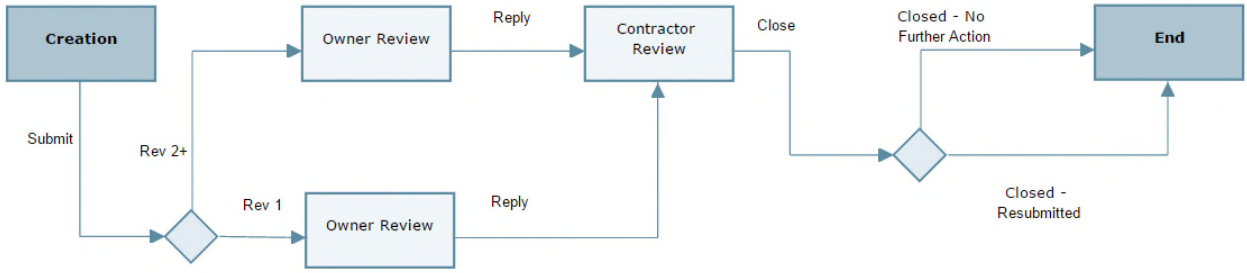
Request for Information (RFI) Business Process Workflow



Creating a Request for Information (RFI) Record

1) Go to your project and ensure that you are in **User Mode**.
2) Expand the **RFI Manager** node.
3) Click **Requests for Information (RFI)**.
4) From the BP log page, click **Create**.From **Request for Information** tab, in the **Title** field (Required), enter a name for the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

5) Complete the form accordingly.
6) When finished, from **Workflow Actions** list select **Submit**.
7) Click **Send**. The names of the recipients appear in the **To** field automatically.

Routing the RFI Record from the Owner Review Step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Provide any additional information to the subcontractor.
5) From the **Workflow Actions** drop-down menu, select **Reply**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
7) Click **Send** to route the record.

Routing the RFI Record from the Contractor Step

To route this record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

- Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.
- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Select the response to **Does this response resolve the question/issue?** from the pull down list.
5) From the **Workflow Actions** drop-down menu, select **Close**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
7) Click **Send** to route the record.
8)

Subcontractor Requests for Information Business Process

Purpose

A standard process for Subcontractors to clarify designs, specifications, and instructions.

Business process characteristics

This is a project level business process with workflow and no line items. An individual help file is available for this business process.

Groups associated with this business process

- Creation: Subcontractors
- Contractor Review and Response: RFI Coordinators. All Project Users can be copied.
- Owner Clarification: Customer. All project users can be copied.
- Subcontractor Review: Subcontractors. All project users can be copied.

Record Statuses

- Subcontractor_Review, a non-terminal status
- SC_Acknowledgment, a non-terminal status
- Owner_Review, a non-terminal status
- Closed, a terminal status

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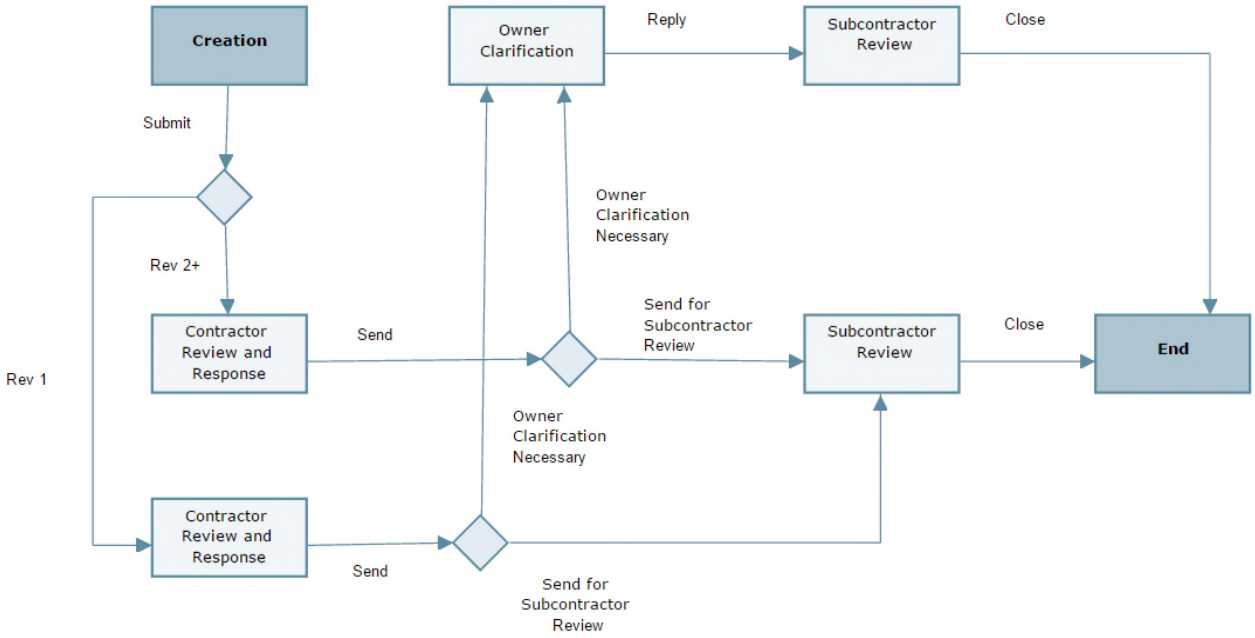
Subcontractor RFI Workflow



Creating a Subcontractor RFI

To create a Subcontractor RFI record:

1) Go to your project. Ensure that you are in User Mode.
2) Expand the **RFI Manager** node.
3) Click **Subcontractor Requests for Information**.
4) From the BP log page, click **Create**.Refer to the tables below to complete the form.
5) In **Workflow Actions**, select **Submit**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's Home page under **Notifications**.
7) Click **Send** to route the record. Unifier displays a message stating that the record has been submitted successfully.

In this field	Do this
Title *	This is a required field. Enter a title for the RFI.

In this field	Do this
Question *	This is a required field. Enter the question or query.
Proposed Solution	Enter any proposed solution
Contract	Select the Contract associated with the RFI by clicking the **Select…** button and selecting it from the Contracts window.
Contract Name	This is a read only field.
Subcontractor RFI #	Enter the subcontractor RFI#.

Routing from the Contractor Review and Response Step

As a contractor reviewing this RFI, you can do the following:

- respond to the subcontractor
- request for owner input
- add risks/issues
- decide if there is a cost, schedule or work impact
- decide if this RFI will result in changes to existing contracts

To respond and route a subcontractor RFI record:

1) Go to your project. Ensure that you are in User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Refer to the table below to complete the required fields.
5) Click the **Risks & Issues tab** and click **Add** to add risks or issues. The system auto creates a Risks & Issues BP record. For more information, see topic *Risks & Issues Business Process*.
6) From the Workflow Actions drop-down menu, select **Submit**.
   - If Owner Input Required? is set to **Yes** the form is routed to the Owner Clarification step.

- If the Owner Input Required? is set to **No** the form is routed to the Subcontractor Review step.

7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
8) Click **Send** to route the record.

In this field:	Do this:
RFI Reason *	This is a required field. Select the appropriate RFI reason from the pull down list.
Owner Input Required? *	This is a required field. Select the appropriate value from the pull down list. If you select **Yes**, then the system auto creates a Request for Information (RFI) BP record with all the relevant information and sends it to the owner for clarification.
Work Impact *	This is a required field. Select the appropriate work impacted value from the pull down list.
Schedule Impact *	This is a required field. Select the appropriate schedule impacted value from the pull down list.
Cost Impact *	This is a required field. Select the appropriate cost impacted from the pull down list.
Comments to Subcontractor	This is a required field. Enter any comment for the subcontractor here. This field is read only if **Owner Input Required?** is set to **Yes**.
Initiate Potential Change?	This is a required field. Select **Yes**, if the RFI will result in changes to any existing contracts. The Potential Change Order BP is auto created if this field is set to **Yes**.
Change Title/Name	This is not a required field. Enter a change request title or name
Description	This is not a required field. Enter a description for the change request.

Routing from the Owner Clarification Step

Once you have received comments from the owner, you can route this record to the subcontractor for review.

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Provide any additional information to the subcontractor.
5) From the **Workflow Actions** drop-down menu, select **Reply**. The record is routed to the subcontractor for review.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
7) Click **Send** to route the record.

Routing from the Subcontractor Review Step

In this step, you can review the record to see if the contractor's response resolves your question. You can choose to close this RFI or resubmit the RFI if you need further clarification.

To route this record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.

- The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Approval step.
- You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
- If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.

4) Select the response to **Does this response resolve the question/issue?** from the pull down list. The value you select controls the behavior of the other fields on the form.
   - **Resolved** – The Issue/query got resolved. Restated Title, Restated Question, and Restated Proposed Solution are locked and set as read only fields.
   - **Not Resolved – No Further Action Required** - The Issue/query did not get resolved. Restated Title, Restated Question, and Restated Proposed Solution are locked and set as read only fields.
   - **Not Resolved – Resubmit RFI** - The Issue/query did not get resolved. The RFI needs to be resubmitted again. Restated Title, Restated Question and Restated Proposed Solution are unlocked and not required.
5) From the **Workflow Actions** drop-down menu, select **Close**.
6) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
7) Click **Send** to route the record.
8)

Requests for Substitution Business Process

Purpose

You can use the Requests for Substitution business process to ask for a change of identical material or equipment. You can add supporting documents to a Requests for Substitution record and Unifier will automatically publish them in the Document Manager.

Business process characteristics

This is a project-level, multiple-instance, Document-type business process with workflow. An individual help file is available for this business process.

Record Statuses

- Pending, a non-terminal status
- Approved, a terminal status
- Rejected, a terminal status
- Canceled, a terminal status

Line Item Statuses

- Closed
- Open

Groups associated with this business process

- Creation: Subcontractors
- Review: Project Managers. All Project Users can be copied.
- Revision: Subcontractors. All Project Users can be copied.

Additional Information

- Requests for Substitution references Contracts.
- Enabled for integration.
- Enabled for publish path.

  Files attached to business process forms or to line items will be automatically published to pre-defined folders in Unifier's Document Manager. Attachments in company-level business processes will be published to specified folders in Company Documents and those in project-level business processes will be published to folders in a project's Documents log.

  Benefits

  In Unifier, files that are attached to a business process form or to its line items from your computer or local system are uploaded, by default, to the Unpublished Documents folder in Document Manager when sent to the next workflow step or by clicking Submit in non-workflow business processes. It requires administrators to publish them from there to the Documents folder. By establishing a publish path, file attachments are directly published to pre-designated folders in the Document Manager for team members to view, comment and collaborate.

  Location

To view the published file attachments of a project-level business process record: In a project's Navigator, click Document Manager and select Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

To view the published file attachments of a company-level business process record: In the Company Workspace Navigator, click Document Manager and select Company Documents. In the Folder panel, locate the pre-defined folder with the same name and view the published documents.

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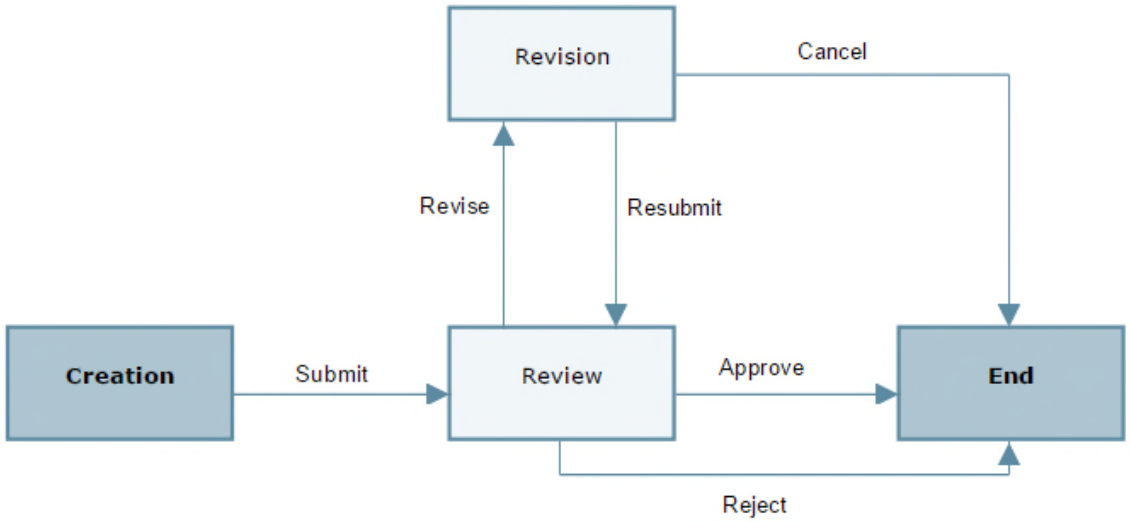
Requests for Substitution Workflow

Below are the four steps of the Requests for Substitution workflow. The action you take on a step determines the record status on the next step; for example, if on the Revision step you select and send "Cancel Request" then the record moves to the End step with a record status of "Canceled." For all steps, except the **End** step, sending a record to the next step creates a task for the record recipient.



Creating a Requests for Substitution Record

The first step in the Requests for Substitution business process workflow is the Creation step. Members of the **Creator** group can create this business process.

To create a new Requests for Substitution record

1) Go to your project. Ensure that you are in the User mode.

2) Expand the **RFI Manager** node.
3) Click **Requests for Substitution**.
4) From the BP log page, click **Create**.Complete the Upper form according to the Upper form table below. You must enter a value in all required fields before you can send the record to the next step in the workflow. If you save the form before you send it, Unifier will save it in your **Drafts** folder.
5) In the **Line Items** section attach supporting documentation. You can add one document per line item. All attachments will be automatically added to the Document Manager.
   a. Click the **Add** button. The Line Items window opens.
   b. In the tool bar located near the top of the Line Item window, click the Attachment button.
   c. Select **Add Attachment** from either:

      My Computer — Use this selection to select and upload a document from your computer.

      Unifier Folder — Use this selection to select and add an attachment that was already uploaded to the Document Manager.
   d. Select the document to attach to this line item and click **OK**. Unifier will show the name of the file in the **Name** field on the line items form.
   e. Complete the Line Items form according to the Line Items table below.
   f. Click **OK** to save the line item.
   g. Continue to add line items until you have completed attaching your substitution information.

      Uploaded documents remain in the **Document Manager > Unpublished Documents** folder until you publish them.
6) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This selection activates **Action Details**.
7) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens that shows a list of available task recipients.
   b. Select the user or group who will receive the task on the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipients **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipients **Notifications** log.
8) Click **Send** to route the record to the **Approval** step.

Upper Form

In this field	Do this
General block	
Record Number	This is a read-only field that Unifier populates when you click **Send**.
Title*	This is a required field - Enter a name for the record.

In this field	Do this
Project Number	This field is auto-populated from the project.
Project Name	This field is auto-populated from the project.
Creator	This is a read-only field that identifies the person that created the record. The field appears as a link to the creator's contact information.
Creation Date	This is a read-only field that Unifier populates when you send the record to the next step.
Due Date*	This is a required field - Unifier pre-populates the date from the workflow setup, but you can change it if desired.
Status	This read-only field is blank while on the Creation step. The status will change when the task is accepted on the next step in the workflow.
Contract Reference	Select the contract for which you want to substitute an item.
Details block	
Spec Title	Enter a name for the spec.
Spec Section	Select a spec section from the drop-down menu.
Page	Enter the page number of the spec.
Article/Paragraph	Enter the article and paragraph on the spec page.
Proposed Solution block	
Proposed Substitution	Enter a synopsis of the proposed solution, up to 30 characters.
Manufacturer	Enter the manufacturer name.
Model	Enter the model.
Trade Name	Enter the trade name.
Address	Enter the manufacturer's address.
Phone	Enter the manufacturer's phone number.
Installer	Enter the installer's name.
Address 1	Enter the installer's address.
Phone	Enter the installer's phone.
History	Enter the installer's history with this type of installation.
Proposed Solution	
Differences between proposed substitution and specified product	Enter a detailed comparison between the specified product and the proposed substitution.

In this field	Do this
Point-by-point comparative data attached - REQUIRED BY Fill in if required	Check this box if Point-by-point comparative data is attached.
Reason block	
Reason for not providing specified product	Enter the reason why this product should be substituted.
Similar Installation block	
Project	Enter the name of a project that used this substitution.
Architect	Enter the name of the project architect.
Address 1	Enter the address of the project that used the substituted product.
Owner	Enter the name of the project owner.
Date Installed	Enter the date the substituted product was installed.
Proposed substitution affects other parts of work	The default entry is **Yes**, use the drop-down menu to select **No**.
Explain block	
Explain	Enter an explanation for substituting the originally specified product.
Savings block	
Savings to Owner for accepting substitutions	Enter the amount the owner would save by accepting the substitution.
Changes*	This is a required field. Use the drop-down menu to select **Add** or **Deduct**.
Proposed Substitution changes Contract Time	The default entry is **Yes**, use the drop-down menu to select **No**.
Days*	Enter the number of days the substitution would change Contract Time.

Item Logs

Line Items Tab

In this field	Do this
General block	

In this field	Do this
Name*	An attachment is required. The document name is auto-populated from the attached file.
Document Type	Select the document type using the drop-down menu.
Short Description	Enter a brief description for the line item.
Line Item Status	Select the line item status using the drop-down menu.
Issue Date	Select the date using the calendar icon.
Action Required	The default value is **Yes**. Use the drop-down menu to change the value to **—**, if appropriate.
Regarding	Enter a brief description to explain how this document pertains to the Request for Substitution.
P6 Activity	Select a P6 activity to associate with this record.
P6 Planned Start	This is a read-only field.
P6 Planned Finish	This is a read-only field.

Routing a Requests for Substitution Record from the Review Step

To route a Requests for Substitution record from the Review step

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Task Manager** node and click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the **Approval** step.
   - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
   - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) Review the Requests for Substitution record and determine the appropriate course of action. You can download any attached files but you cannot upload any on this step.
5) Click the **Workflow Actions** drop-down menu. You may select:
   - **Approve** — this selection will send the record to the End step in **Approved** status.
   - **Revise** — this action keeps the workflow in flight and in **Pending** status.

a. In the **Action Details** section **To**... is preassigned, but you can select message recipients in the **Cc** field.
b. Click **Cc...** Select the user or group who will receive the record on the next step.
c. Click **Add**.
d. Click **OK**. The **User/Group** picker closes and the selection appears in the **Cc** field. Upon sending, the record will appear in the recipient's **Collaboration** > **Messages** log.

- **Reject** — this selection will send the record to the End step in **Rejected** status.

6) (Optional) Add comments to the record through **General Comments** or **Task Notes**.
   - To add General Comments click the link at the bottom center of the form. These comments are permanent.
   - To add Task Notes click the icon in the Action Details section of the form. Task Notes will be visible on the View form at the next step in the workflow until the task assignee accepts the task.
7) Click **Send**.

Routing a Requests for Substitution Record from the Revision Step

Upon sending the business process form forward to the **Revision** step, Unifier sends a task to the record creator and a message to those selected in the **Cc** field. You can see your active tasks in your **Tasks** log.

To route a record from the Requests for Substitution Revision step

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.

4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. In the Upper form section you can change most record details.
5) In the **Line Items** section you can Modify, Add, or Delete line items and attachments as needed. Follow the same directions as adding line items during record creation.
6) Click **OK** to save the Line Items.
7) When ready, select a workflow action. This action activates **Action Details**. The choices are:

   - **Resubmit** — This action sends the record back to the Approval step in Pending status.

   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task when the record returns to the **Approval** step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field.

e. (Optional) Click **Cc...** Select the user or group who will receive the record on the next step.
f. Click **Add**.
g. Click **OK**. The **User/Group** picker closes and the selection appears in the Cc field. Upon sending, the record will appear in the recipient's **Notifications** log.

- **Cancel** — This action sends the record to the End step in Canceled status. The To and Cc field are unavailable.

8) In **Action Details**, depending upon the workflow action selection, select who should receive the task and who should be copied on the action.
9) When ready, click **Send**.

Viewing the Requests for Substitution on the End step

This is the last step in the workflow. You cannot take action on this step because the record is in a terminal status: Approved, Rejected, or Canceled. Once on the **End** step the record is viewable only in the business process log.

- ***To view a Requests for Substitution record on the End step***

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **RFI Manager** node.
3) Click **Requests for Substitution**. The Requests for Substitution log opens.
4) Open the record. In the record you can see the record status. When the record is on the End step, Task Details displays the text "Record has been closed."
5) Click the "**Click here**" link. The Workflow Progress window opens. This is where you can trace the record's progress through the workflow.
6) Click **View Graphic** to see an image of the workflow.

Drawing Management

Drawing Sets Business Process

Purpose

You can create a Drawing Sets record to capture and manage multiple drawings pertaining to your project. The records you create using this BP, appear as data-picker options in other business processes.

Characteristics

This is a project-level, non-workflow business process with line items.

Groups associated with this business process

Members of the Drawing Controllers group can create and edit this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status.

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Creating a Drawing Sets Record

To create a Drawing Sets record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Drawing Management** node and click on **Drawing Sets**.
3) From the BP log page, click **Create**.Enter a title.
4) From the **Status** pull-down menu, select a status.
5) In the Line Items section, enter a short description for this set of drawings. This is a required field. Complete the other optional fields.
6) Click **Save** to save your changes.
7) Click **Finish Editing** when you are ready to create a new drawing set record.

> **Note:** You must enter a value in all required fields (*) before you can save the form. If a field is grayed out, no action is required.

Editing a Drawing Sets Record

To view or edit the Drawing Sets record,

1) Go to your project and ensure that you are in User mode.
2) Expand the **Drawing Management** node and click on **Drawing Sets**.
3) Open the record you want to view or edit.
4) Click **Edit** and make your changes.
5) Click **Finish Editing** when you are done updating the record.

Drawings Business Process

Purpose

You can create a Drawings record to capture and manage drawings.

Characteristics

This is a project-level, non-workflow business process with line items.

Groups associated with this business process

Members of the Drawing Controllers group can create and edit this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status.

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Creating a Drawings Record

To create a Drawings record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Drawing Management** node and click on **Drawings**.
3) From the BP log page, click **Create**.Enter a title.
4) From the **Status** pull-down menu, select a status.
5) Refer to the table below to complete the Upper form.
6) Click **Add** on the **Issues** tab to record issues associated with this drawing.
7) Click **Save** to save your changes.
8) Click **Finish Editing** when you are ready to create a new drawings record.

Note: You must enter a value in all required fields (*) before you can save the form. If a field is grayed out, no action is required.

In this field	Do this
Drawing Title	Enter a title for this drawing.
Status*	Enter the status. This is a required field.

Drawing Number	Enter a number to identify this drawing.
Vendor Name	Enter a vendor name.
Discipline	From the drop-down menu, select a discipline.
Drawing Phase	From the drop-down menu, select a drawing phase.
Area	Select a location.
Specification Section	Select a specification section.
P6 Activity	Select a P6 activity, that is associated with this drawing.
Selected issue #	Select an issue associated with this drawing.
Create a new Issue?*	Select **Yes**, if you want to create a new issue. This is a required field.
Risk Category*	Select a risk category. This is a required field.
Description*	Enter a description. This is a required field.
Line Item Status	Select a status for this line item.

Editing a Drawings Record

To view or edit the Drawings record,

1) Go to your project and ensure that you are in User mode.
2) Expand the **Drawing Management** node and click on **Drawings**.
3) Open the record you want to view or edit.
4) Click **Edit** and make your changes.
5) Click **Finish Editing** when you are done updating the record.

Drawing Revisions Business Process

Purpose

You can use the Drawing Revisions record to capture and manage drawing revisions.

Characteristics

This is a project-level, non-workflow business process with line items.

Groups associated with this business process

Members of the Drawing Controllers group can create and edit this business process.

Record Statuses

- Pending, a non-terminal status.
- Approved, a terminal status.

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Creating a Drawing Revisions Record

To create a revision record for a Drawings record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Drawing Management** node and click on **Drawing Revisions**.
3) From the BP log page, click **Create**.From the **Status** pull-down menu, select a status.
4) Refer to the table below to complete the Upper form.
5) Click **Add** on the **Issues** tab to record issues associated with this drawing.
6) Click **Save** to save your changes.
7) Click **Finish Editing** when you are ready to create a new drawing revision record.

Note: You must enter a value in all required fields (*) before you can save the form. If a field is grayed out, no action is required.

In this field	Do this
Revision Number*	Enter a revision number for this drawing.
Status*	Enter the status. This is a required field.
Priority	Select a priority for this revision.
Date Received	Enter a vendor name.

Issue Date	From the drop-down menu, select a discipline.
Drawing*	From the drop-down menu, select a drawing.
Drawing Title	This is a read-only field.
Vendor	This is a read-only field.
Discipline	This is a read-only field.
Drawing Phase	This is a read-only field.
Area	This is a read-only field.
Specification Section	This is a read-only field.
P6 Activity	Select a P6 activity, that is associated with this drawing.
Selected issue #	Select an existing issue associated with this drawing.
Create a new Issue?*	Select **Yes**, if you want to create a new issue. This is a required field. This is auto populated if you selected an existing field.
Risk Category*	Select a risk category. This is auto populated if you selected an existing field.
Description*	Enter a description. This is auto populated if you selected an existing field.
Line Item Status	Select a status for this line item. This is auto populated if you selected an existing field.
Area	Select a location.

Schedule Manager

The Schedule Manager tracks project schedules through activities in schedule sheets.

You can create a project schedule sheet that lists your project activities and associates each activity to dates (such as start and finish dates), cost codes, roles, and dependencies.

You can track schedule progress and variables, and calculate the schedule critical path.

In Unifier, you can also import project schedule records from other sources. For example, you can import project schedule records from Oracle Primavera P6 to provide additional detail, or supporting schedule information, such as subcontractor or vendor schedules. You can edit imported schedules within Unifier and generate reports based on that data processed.

Schedule sheets present schedule activities, such as interactive Gantt charts, where you can:

- Zoom in to see tasks at the day, week, or month level
- Move activities and add dependency relationships, and automatically update the dates on the schedule
- Create critical path calculations that will flag activities that, if delayed, can cause the schedule to go beyond the planned project end date

Each project can have multiple schedule sheets, and one master schedule sheet. The master sheet drives project start and end dates, tracks the project's progress, and integrates cost items on the schedule with the Cost Manager.

For more information about the Schedule Manager, refer to the *Unifier User Guide*.

For details about Schedule Sheet refer to the *Unifier User Guide*.

Communication and Followup

Action Items Business Process

Purpose

Create, assign, and track action items. Action items are often auto-created in the Meeting Minutes business process.

Characteristics

This is a Project-level business process with a workflow. It is available in both the Owner and General Contractor templates.

Groups Associated with this Business Process

All Project Users can create, review, reassign, and complete an action item.

Record Statuses

- Open: A non-terminal status.
- Closed: A terminal status.
- Awaiting _Review: A non-terminal status
- Awaiting_Assignment: A non terminal status
- Canceled: A terminal status.

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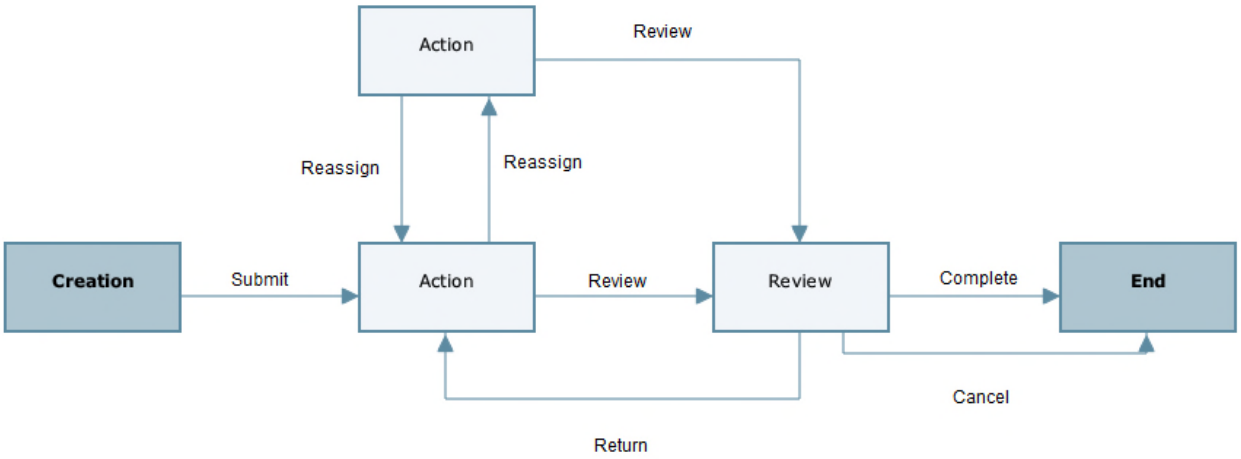
Action Items Workflow



Creating an Action Items Record

To create an Action Item record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Communications & Followup** node and select **Action Items**. The Action Items log opens.
3) From the BP log page, click **Create**. Refer to the tables below to complete the form. You can click **Save** at any time to save a draft version of the form. The drafts are stored under **Drafts**.
4) In **Workflow Actions** select the workflow action to take. In this case, your selection is **Submit**. This action activates **Action Details**.
5) In **Action Details**, select who should receive the record.
   a. Click **To**... The **User/Groups** picker opens and displays a list of available task recipients.
   b. Select the user or group who will receive the task on the next step.
   c. Click **Add**.
   d. Click **OK**. The **User/Group** picker closes and the selection appears in the **To** field. Upon sending, the record will appear in the recipient's **Tasks** log.
   e. (Optional) Click **Cc...** and follow steps a - d. The record will appear in the recipient's **Notifications** log.
6) Click **Send** to route the record to the Review step. Unifier displays a message stating that the record has been submitted successfully.

> **Note:** You must enter a value in all required fields (*) before you can save the form. If a field is grayed out, no action is required.

Action Item tab

General

In this field:	Do this:
Project Number	No action.
Record Number	No action.
Project Name	No action.
Creator	No action.
Name/Title	(Required) Enter a name for this action item.
Creation Date	No action.
Due Date	Select a date.
Contract Reference	Select a contract that is associated with this action item
Status	No action. This field is auto-populated.

Action Item Information

In this field:	Do this:
Priority	No action. This is a read-only field.
Assigned To	(Required) Select the user you are assigning this action item to.
Start Date	No action. This is a read-only field.
Action Item Complete Date	No action. This is a read-only field.
External Assignee?	Select **Yes**, if the action item is assigned to an external user.
External Assignee Name	Enter the name of the external assignee.
Action Item Approver Email	No action. This is a read-only field.
Ext Company name	Enter the name of the external company.
E-Mail	Enter the email address of the external assignee.
Action Item Approver	Select an approver for this action item.

Additional Details

In this field:	Do this:
Description	Enter a comprehensive description.
Notes/Resolution	Enter your notes or resolutions.

Details on Action Taken

In this field:	Do this:
Brief Summary of Actions Taken	No action. This is a read-only field.

Related Business Processes

In this field:	Do this:
Action Item Type	This field is auto-populated. You can replace the text in this field.
Meeting Number	No action. This is a read-only field.
Punch List Record #	No action. This is a read-only field.
Meeting Minutes Line Item	No action. This is a read-only field.
Punchlist Line Item	No action. This is a read-only field.

Action Details tab
This tab is enabled only after you select a workflow action.

In this field:	Do this:
To	Enter email address of the recipients.
Cc	(Optional)
Task Notes	Click on the icon (Task Notes) to open Add Notes window and enter notes.

Routing the Action Items Record for Review

The Action Items that are assigned to you are displayed on the Task log. After accepting and completing your assigned task, you can route the task record for review. You can also choose to reassign this task to another user by selecting **Reassign** from the Workflow **Actions**.

To complete the Action Item and send it for review:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Complete the form accordingly and click **Save**.
5) From the **Workflow Actions** list, select **Review**.
6) Add recipients, enter any general comments, notes, and click **Send**. The record is routed to the next step in the workflow.

Closing an Action Items Record

When an Action Item record is completed, it is sent for review. As a reviewer, you can either approve the record by selecting Complete, or select Return if the record requires more work, or select Cancel to close the record and move it to the end step.

To review and close the Action Items record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Communication & Followup** node and click on **Action Items**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

- The Upper Form contains project information, including the record number and title.

4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. From the **Workflow Actions** list, select **Complete**.
5) Select and add recipients, follow the prompts, and when finished, click **Send**.The Action Items record is closed and removed from the Tasks log. The record will appear in the recipient's **Notifications** log.

Meeting Minutes Business Process

Purpose

Capture project-related meeting minutes, track unresolved items, launch follow-up action items, and track progress between meetings. You can:

- Attach files, link records, and add general comments to the record.
- Add and review line items associated with the meeting in the Line Items form.

The Meeting Minutes log stores the records and its status. Unifier generates action items for each line item in the Meeting Minutes record.

Characteristics

This is a Project-level business process with line items and a workflow. It is available in both the Owner and General Contractor templates.

Groups Associated with this Business Process

- Meeting Planning Creation: Project Coordinators can create meeting minutes.
- Documentation of Meeting Results: Project Coordinators can take actions. All Project Users group can be copied in this step.
- Review: Project Managers can review the meeting minutes. All Project Users can be copied in this step.

Record Statuses

- Pending: A non-terminal status.
- Completed: A non-terminal status
- Canceled: A terminal status.

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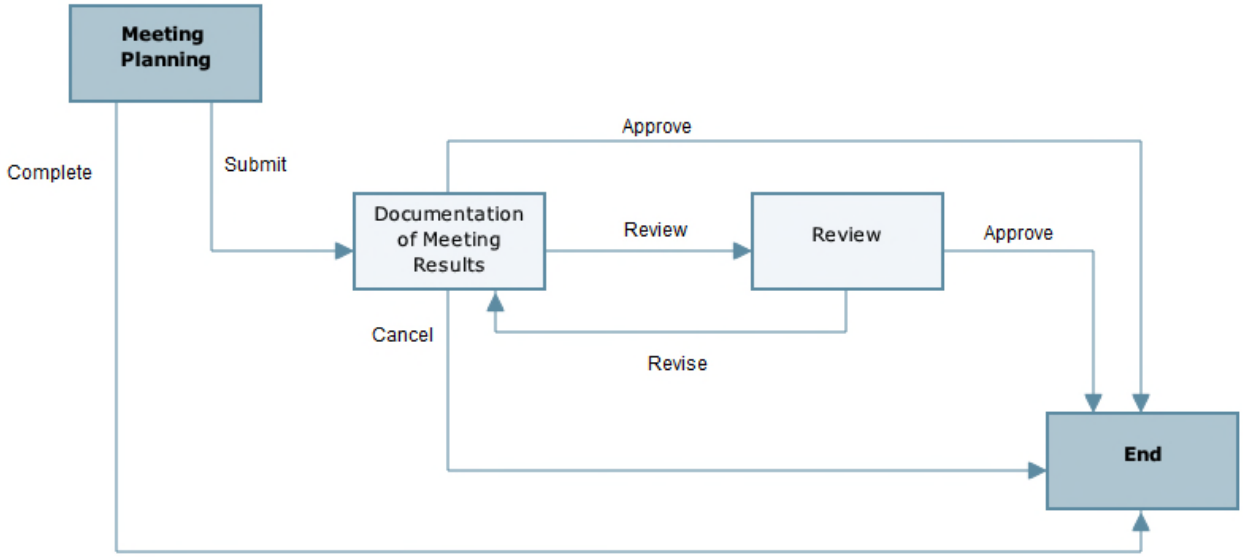
Reviewing the Documentation of Meeting Results 439
Reviewing a Meeting Minutes Record 440
Viewing a Closed Meeting Minutes Record 440

Meeting Minutes Workflow

The following diagram shows the Meeting Minutes workflow:



Creating a Meeting Minutes Record

To create a Meeting Minutes record.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Communication & Followup** node and click on **Meeting Minutes**.
3) From the BP log page, click **Create**.Refer to the tables below to complete the form. You can click **Save** at any time to save a draft version of the form. The drafts are stored under **Drafts**.
4) To add details about the line items, click **Add** on the detail line item. Refer to the Detail Line item tables, to complete the form.
5) After completing the form, select **Submit** from the **Workflow Actions**. You can also select **Complete** to send the record to the final step in the workflow.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

General

In this field:	Do this:
Record Number	No action.
Title	(Required) Enter title.
Project Number	No action.
Project Name	No action.

Creator	No action.
Creation Date	No action.
Due Date	No action. **Note**: You cannot change the record due date after creation.
Status	No action.

Meeting Details

In this field:	**Do this:**
Subject*	This is a required field. Enter the subject for the meeting.
Meeting Date and Start Time	Enter the meeting date and time.
Meeting Coordinator	Select the user who is coordinating this meeting. Click the **Select...** button and select from a list of users.
Meeting Type	From the pull-down menu, select the type of meeting.
Action Item Approver	Click **Select...** to select the user who will approve the action item.

Meeting Location Details

In this field:	**Do this:**
Meeting Location Name	Enter the location of this meeting.
City	Enter the city.
Address	Enter the address where this meeting is taking place.
State/Province	From the pull-down menu, select your State/Province.
Zip	Enter the zip code of the meeting location.

Summary

In this field:	**Do this:**
Purpose	Enter a description for the purpose.

Meeting Stats

In this field:	**Do this:**

# of Invited Attendees	No action. This is a read-only field. It displays the number of attendees invited to the meeting.
# of Attendees	No action. This is a read-only field. It displays the number of attendees attending the meeting.
# of Business Items	No action. This is a read-only field. It displays the number of business items on the meeting agenda.

Line Items tab

Business Item Details

In this field:	**Do this:**
Name/Title *	Enter a name or title of the business item.
Details	Enter detailed information for the business item.
Business Item Type	Select the business item type from the pull-down list.
Item #	Enter the business item number.

Meeting Conclusion Details

In this field:	**Do this:**
Notes/Resolution	At the completion of the meeting the following was concluded about this business item
Key Decision?	Select the key decision from the pull-down list. Set the key decision field to **Yes** if this represents a key decision to be reported in the decision log report.

Follow Up Action Required

In this field:	**Do this:**
Further Action Required?	From the pull-down list, select if further action is required.
Description	If Further Action Required? value is set to **Yes,** then Description is a required field. Enter follow up description
Due Date	Enter the date when the follow up action is due.

Assigned To	If Further Action Required? value is set to **Yes,** then Assigned To is a required field. Select the user to whom the follow up action is assigned by clicking the **Select…** and select the candidate user.
Company Name	Enter the name of the assigned user's company name.
External Assignee?	If the assignee is external (or internal) select appropriate value by from the pull down list by clicking the Select…
Ext. Company Name	Enter the external assignee's company name.
Ext. Assignee Name	Enter the external assignee's name.
Action Item Approver	Select the action item approver by clicking the Select… and selecting the user.
Action Item Approver Email	The field populated with selected action item approver's email address

Resolution Details

In this field	**Do this**
Brief Summary of Action Taken	Enter any action taken against the business item.
Start Date	Enter the date the resolution was or will be taken.
Action Item Complete Date	Enter the date the resolution was completed.
Action Item Record #	The field will auto-populate with values if an action item record is related to the business item.
Action Item Status	The field will auto-populate with status values if an action item record is related to the Business Item

Other Information

In this field	**Do this**
Short Description *	This field gets populated with the Name/Title value in the Business Item Details block
Line Item Status	Select status value from the pull down list.

Attendees Tab

Invited Attendee Information

In this field	Do this
Invited Attendee (selector)	Select the attendee from the list of users by clicking the Select… button.
In Attendance	Select in attendance value for the invited attendee from the pull down list.
Include in next meeting?	Select include in next meeting for the invited attendee from the pull down list.
Attendee Name	If the attendee was selected from the Invited Attendee (selector) list this field gets populated by the attendee's name. If the attendee was not selected from the Invited Attendee (selector) then enter the attendee's name.
Company Name	If the attendee was selected from the Invited Attendee (selector) list this field gets populated by the attendee's company name. If the attendee was not selected from the Invited Attendee (selector) then enter the attendee's company name
Title	If the attendee was selected from the Invited Attendee (selector) list this field gets populated by the attendee's title. If the attendee was not selected from the Invited Attendee (selector) then enter the attendee's title.
E-mail	If the attendee was selected from the Invited Attendee (selector) list this field gets populated by the attendee's e-mail address. If the attendee was not selected from the Invited Attendee (selector) then enter the attendee's e-mail address.
Mobile Phone	If the attendee was selected from the Invited Attendee (selector) list this field gets populated by the attendee's mobile phone number. If the attendee was not selected from the Invited Attendee (selector) then enter the attendee's mobile phone number.
Work Phone	If the attendee was selected from the Invited Attendee (selector) list this field gets populated by the attendee's work phone number. If the attendee was not selected from the Invited Attendee (selector) then enter the attendee's work phone number.

Business Item Details

In this field	Do this

Selected Issue #	Select from an existing issue, which will then auto-populate the issue title and details fields
Create new issue?	Create a new issue by selecting Yes from the pull down list and then entering in the issue details.
Issue Title/Short Description *	This field gets auto-populated with issue title if an issue was selected from the Selected Issue #. If Create new issue? was set as yes then enter Issue title or short description.
Issue Details *	This field gets auto-populated with issue details if an issue was selected from the Selected Issue #. If Create new issue? was set as yes then enter Issue details.
Short Description *	This field gets populated with Issue Title/Short Description as entered above.
New Issue Record #	Enter the issue record number.

Action Item Info

In this field:	**Do this:**
Create Action Item?	Select an option. The default is Yes.
Action Item Created	No action.
Title	No action.
Action Item Status	No action.

Reviewing the Documentation of Meeting Results

In the Documentation of Meeting Results step, you can either approve the record, send the record for additional review, or cancel the meeting minutes.

To review the meeting minutes and determine the appropriate course of action:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. From the **Workflow Actions** list, select one of the following options: **Review**, **Approve**, or **Cancel**.

5) Click **Send**.

Reviewing a Meeting Minutes Record

In the Review step, you can either approve the meeting minutes record, or send it back for revision.

To review the meeting minutes record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Click **General Comments**, add comments, and click **Add**.
5) Enter comments in the **Hidden Comment** field, if needed.
6) Click **OK** and close the window.
7) From the **Workflow Actions** list, select **Approve** or **Revise**.
8) Click **Send**.

Viewing a Closed Meeting Minutes Record

1) Go to your project and ensure that you are in User mode.
2) Navigate to the **Communication & Followup** node and click to expand.
3) Click **Meeting Minutes**.
4) Open the record.
5) From the **Task Details** tab, click **Click here** to open the **BP Progress** (**Workflow Progress**) window.
6) Ensure that the value for the **Current Step** is **End**.
7) Under the **Step Name** field, click **Review** to select.
8) Click **View Graphic** to open the **Workflow Designer** window. The **End** box is highlighted.

Transmittals Business Process

Purpose

Record transmittals and track their associated line items in a project. The Transmittals log stores transmittals and their status.

Characteristics

This is a document type, Project level business process with a workflow and line items. It is available in both the Owner and General Contractor templates.

Groups associated with this business process

- Creation: Project Coordinators
- Review: Project Manager. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.
- Acknowledge Receipt: All Project Users. All Project Users can be copied.

Record Statuses

- Pending: non-terminal status
- Sent: non-terminal status
- Canceled: terminal status
- Acknowledged: terminal status

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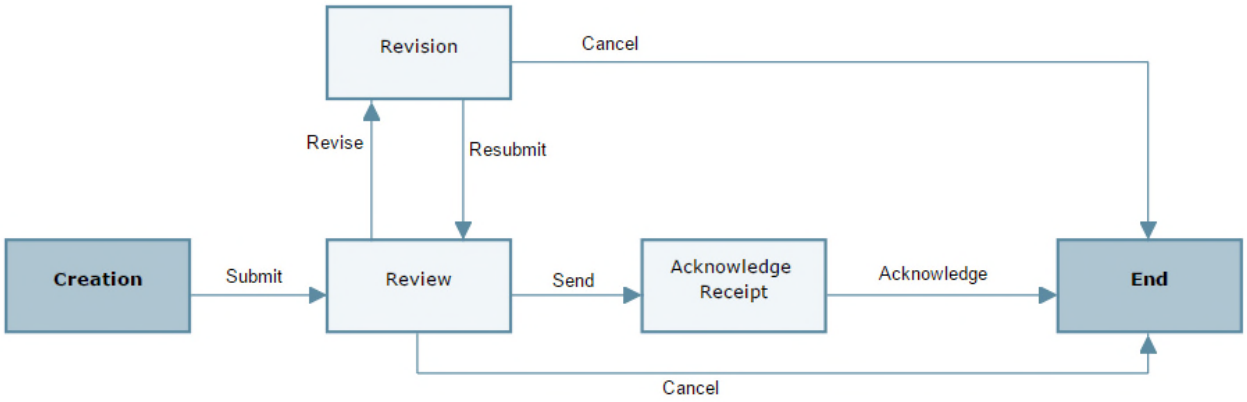
Viewing a Closed Transmittals Record 445

Transmittals Business Process Workflow

The following diagram shows the four steps of the Transmittals workflow:



Creating a Transmittals Record

Create a Transmittal record to initiate and accept/reject a new transmittal approval request.

Provide information about the transmittal, such as a description and the type of items you are sending, as well as the delivery format. Attach related files in the Line Items section. After completing the Submittals form, select an action in the Workflow Actions list to determine the next step in the workflow. Click Send to route the form to the next assignee.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Communication & Followup** node and click on **Transmittals**.
3) From the BP log page, click **Create**.Refer to the tables below to complete the form. You can click **Save** at any time to save a draft version of the form. The drafts are stored under **Drafts**.
4) After completing the form, select **Submit** from the **Workflow Actions**.
5) On the **Line Items** tab, click **Add** to open the **Transmittals Line Item**.
   a. Refer to the Transmittal Line Items table to complete the form.
   b. From the Transmittal Line Items window, click **Attachment** and select **Add Attachment > Unifier Folder**.
   c. Select a file, click **OK**.
6) On the **Action Details** tab, select who should receive this record.
7) Click **Send**. When the **Notification** window opens, review the content and click **OK**. The record now moves to the next step in the workflow.

> **Note:** You must enter a value in all required fields (*) before you can save the form. If a field is grayed out, no action is required.

Transmittal tab (General)

In this field:	Do this:
Record Number	No action.

In this field:	Do this:
Title	(Required) Enter a title.
Project Number	No action.
Project Name	No action.
Specification Section	Select a section from the list.
Creator	No action.
Creation Date	No action.
Due Date	No action.
Status	No action.
Contract Reference	Select a contract record from the list.
Count of Items Included	No action.
P6 Activity	Select a CBS activity this transmittal is associated with.
P6 Planned Start	No action. This field is auto-populated based on the P6 activity you selected.
P6 Planned Finish	No action. This field is auto-populated based on the p6 activity you selected.

Description

In this field:	Do this:
Description	Enter a description.

Delivered Via

In this field:	Do this:
Delivered Via	Select a method from the list.
Date Shipped	Use the calendar icon to enter date.
Tracking No.	Enter information if available.
Expected Delivery	Use the calendar icon to enter date.

Remarks

In this field:	Do this:
Remarks	Enter remarks if applicable.

Line Items (General)

In this field:	Do this:
Name	(Required): The name of the select file appears automatically.
Line Item Status	Select from the list.
Document Type	Select from the list.
Submitted For	Select from one of the options.
Short Description	Enter description.
Issue Date	Use the calendar icon to enter date.
Copies	Enter a number
Action Required	Select from the list.
Due Date	Use the calendar icon to enter date.
Regarding	Enter description.

Revising a Transmittals Record

To revise and resubmit a Transmittals record sent to you for revision:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) Open the transmittal record that you want to revise.
4) Click **Accept Task**.
5) Update the record.
6) From **Workflow Actions** list, select **Resubmit**.
7) From **Action Details** tab, click **To**, select and add a recipient, and click **Send** to forward the record to the next step in the workflow.

Acknowledge a Transmittals Record

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) Open a **Transmittals Record**, click the **Line Items** tab, open the line item, open the document and review the content.
4) Click **Accept Task**.
5) From **Workflow Actions** list, select **Acknowledge**. The transmittal is routed to the end step.
6) Click **Send**.

Viewing a Closed Transmittals Record

1) Go to your project and ensure that you are in User mode.
2) Navigate to the **Communication & Followup** node and click to expand.
3) Click **Transmittals**.
4) Open the record.
5) From Task Details tab click **Click here**.
6) Click a workflow step to see the task details.
7) Click **View Graphic**. The current workflow step is highlighted.

Ongoing Reporting

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Daily Reports Business Process

Purpose

Record activities, progress, site visits, issues, resolutions, and other information related to a job site. The Daily Reports log stores all daily report records and their status.

Characteristics

This is a Project level business process with line items and a workflow. It is available in both the Owner and General Contractor templates.

Record Statuses

- Pending: a non-terminal status
- Approved: a terminal status

Groups associated with this business process

- Creation: Subcontractors can create this report
- Review: Project Manager can review this report. All Project Users can be copied on this report.
- Revision: Subcontractors can create this report. All Project Users can be copied on this report.
- End: All Project Users can be copied on this report.

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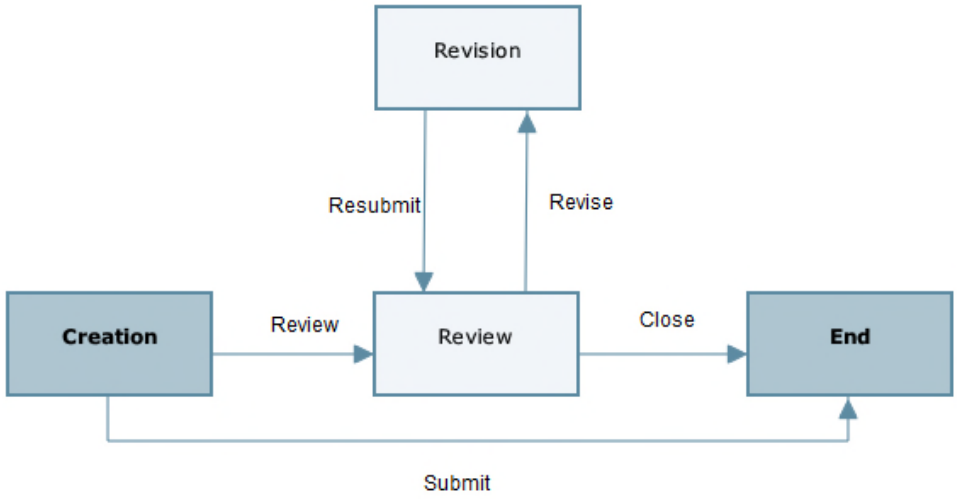
Viewing Closed Daily Reports Record 451

Daily Reports Business Process Workflow

The following diagram shows the four steps of the Daily Reports workflow. The action you take on a step determines the record status on the next step. For example, if on the Revision step you select Close Daily Report, the record moves to the End step with a record status of Approved. Sending a record to either the Review step or the Revision step creates a task for the record recipient.



Creating Daily Reports Record

Creates a Daily Reports record. You can list the equipment, visitors, workforce, and materials used at the site during a time period. After completing the Daily Reports form, you can either submit the record or send it for review. If you select **Submit**, the form moves to the last step in the workflow and no further action is required. If you select, **Review**, the form is sent to the selected assignee for review.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Ongoing Reporting** node.
3) Click **Daily Reports**.
4) From the BP log page, click **Create**.(Required) In the **Title** field, enter a title.
5) In the **Contract Reference** field, click **Select** to associate a contract with this report.
6) Update the optional fields under the Report Details, Comments, Weather, Discrepancies and Deficiencies sections of the form. On the Photos section, select if you took any photographs and if you attached them to this report. Under the P6 Activity Details section, select a P6 activity to associate with this report.
7) From the Item Logs, fill out the optional fields in each of the following tabs: Equipment, Materials, Visitors, Workforce, and Issues.

8) When finished entering information, from the **Workflow Actions** list, select **Submit** or **Review**.
9) Click **Send** to route the record.

Revising Daily Reports Record

If you have been assigned to revise and resubmit the daily reports:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) Open the **Daily Reports** record that you want to revise.
4) Click **Accept Task**.
5) Update the record.
6) From the **Workflow Actions** list, select **Resubmit**.
7) Click **Send** to route the record for approval.

Closing Daily Reports Record

If you have been assigned to review and close the daily reports:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) Open the **Daily Reports** record that you want to close.
4) Click **Accept Task**.
5) Review the record.
6) From the Workflow Actions list, select **Close**. The report moves to the final step the workflow and has the status of Approved.

Viewing Closed Daily Reports Record

To view a closed daily reports record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Ongoing Reporting** node.
3) Click **Daily Reports**.
4) From the log, select the record that you want to view.
5) From the **Task Details**, click **Click here** to open the **BP Progress** window.
6) Click **View Graphic** to open the workflow graphic showing tasks steps and links.
7) Click **Close Window** to finish viewing a closed record.

Incident Reports Business Process

Purpose

Initiate a new incident report request, capture and store information regarding a safety issue. The Incident Reports log stores all incident reports along with their status.

Characteristics

This is a Project level business process with line items and a workflow. It is available in both the Owner and the General Contractor templates.

Record statuses

- Pending: a non-terminal status
- Approved: a terminal status
- Rejected: a terminal status
- Canceled: a terminal status

Groups associated with this business process

Contractor creates, submits, and updates records for review, and cancels reviewed records. Project manager reviews, approves, cancels, or rejects the incident reports record.

- Creation: All Project Users
- Review: Project Manager, All Project Users can be copied.
- Revision: All Project Users can create and can be copied.
- End: All Project Users can be copied.

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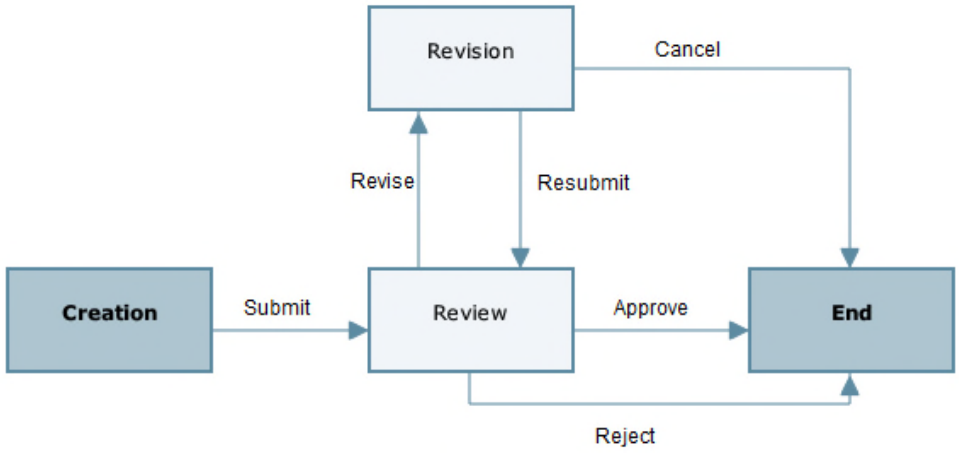
Incident Reports Business Process Workflow

The following diagram shows the four steps of the Incident Reports workflow. The action you take on a step determines the record status on the next step. For example, if on the Revision step you select Resubmit for Approval, the record moves to the Approval step with a record status of Pending. Sending a record to either the Revision step or the Approval step creates a task for the record recipient.



Creating Incident Reports Record

Create an Incident Reports record to describe the event and provide details of how the event occurred. Also, include information about injuries and illnesses related to the event.

After completing the Incident Reports form, select an action in the Workflow Actions list to determine the next step in the workflow.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Ongoing Reporting** node.
3) Click **Incident Reports**.
4) From the BP log page, click **Create**.(Required) In the **Title** field, enter a title.
5) In the **Location** field enter the location that the incident occurred.
6) Click the **Incident Report** tab to expand the form.
7) In the **Date of Event** field click the **Date/Time** icon, select the date of incident, and click **OK**.
8) Complete the fields in the form accordingly.
9) In the **Project Manager** field click **Select**, select the Project Manager's name, and click **OK**.
10) Click the **Contacts** tab to expand the form, click **Add**, and complete the form.
11) From the **Line Item Status** list select **Open** and click **OK**.
12) From the **Workflow Actions** list, select **Submit**.
13) Click **Send** to route the record for approval and then click **OK**.

Revising Incident Reports Record

If you have been assigned to revise and resubmit an incident report:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Update the record.
5) From the **Workflow Actions** list, select **Resubmit**.
6) Click **Send** to route the record for approval.

Approving Incident Reports Record

To approve a Incident Reports record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. From the **Workflow Actions** list, select **Approve**.
5) Click **Send** and then click **OK.**

Viewing Closed Incident Reports Record

To view a closed Incident Reports record:

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Ongoing Reporting** node and click on **Incident Reports**.
3) Open the incident reports record that you want to view.
4) From the **Task Details**, click **Click here** to open the **BP Progress** window.

5) Click **View Graphic** to open the workflow graphic showing tasks steps and links.
6) Click **Close Window** to finish viewing a closed record.

Monthly Updates Business Process

Purpose

Initiate a new monthly update record. This form is filled in by the owner's project manager or owners representative to report status, trends and risks to project owners.

Characteristics

This is a Project level business process with a workflow.

Record Statuses

- Pending: a non-terminal status
- Approved: a terminal status
- Rejected: a terminal status
- Canceled: a non-terminal status

Groups associated with this business process

- Creation: Project Manager can create this record.
- Review: Customer (project owner) can review this record. All Project Users can be copied on this record.
- Revision: Project Manager can review this record. All Project Users can be copied on this record.
- End: All Project Users can be copied on this record..

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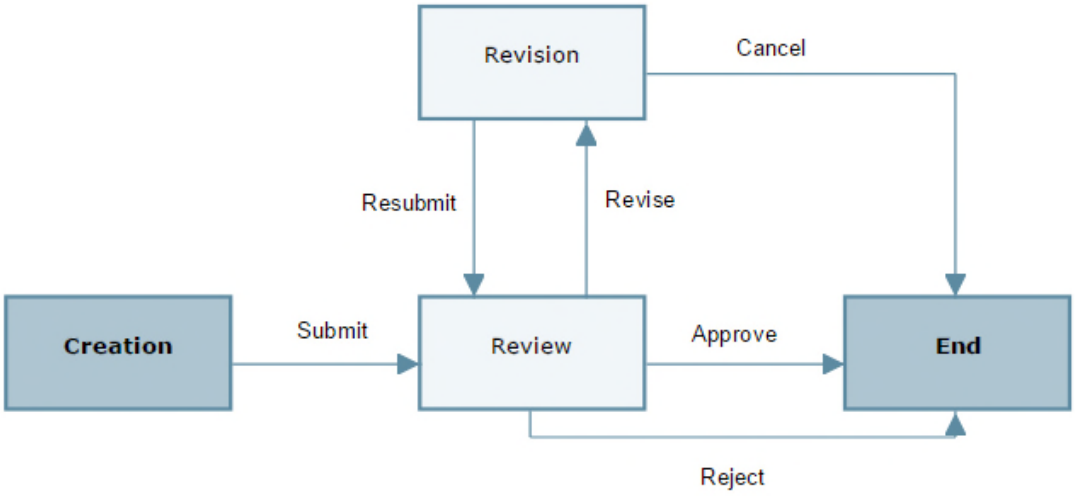
Monthly Updates Business Process Workflow

The following diagram shows the four steps of the Daily Reports workflow. The action you take on a step determines the record status on the next step. For example, if on the Revision step you select Close Daily Report, the record moves to the End step with a record status of Approved. Sending a record to either the Review step or the Revision step creates a task for the record recipient.



Creating Monthly Updates Record

Create a Monthly Updates record to initiate a new Monthly Updates record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project. Ensure that you are in the User mode.
2) Expand the **Ongoing Reporting** node.
3) Click **Monthly Updates**.
4) From the BP log page, click **Create**.The Create New Monthly Updates form. (Required) In the **Title** field, enter a title.
5) In the **Contract Reference** field, click **Select** to associate a contract with this report.
6) (Required) From the **Year** list, select the year.
7) (Required) From the **Month** list, select the month.
8) (Required) From the **Schedule Status** list, select an option.
9) (Required) From the **Budget Status** list, select an option.
10) Specify the main points of the monthly report in the **Summary** field.
11) Update the optional fields under the **Scheduled Overview**, **Plans for next 30 days**, **Design Status and Approval**, **Constructions Accomplishments**, **Changes**, **Opportunities and Challenges** sections**.**
12) Record issues in the **Issues** and **Actions** section.

13) From the **Workflow Actions** list, select **Submit**.
14) In the **Action Details** tab click **To**, select and add recipients, and click **OK**.
15) Click **Send** to route the record for approval and then click **OK**.

Revising Monthly Updates Record

If you have been assigned to revise and resubmit the monthly updates reports:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. Update the record.
5) From the **Workflow Actions** list, select **Resubmit**.
6) Click **Send** to route the record for approval and then click **OK**.

Approving Monthly Updates Record

To approve a Monthly Updates record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
4) The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. From the **Workflow Actions** list, select **Approve**.
5) Click **Send** and then click **OK.**

Viewing Closed Monthly Updates Record

To view a closed Monthly Updates record:

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) Open the **Monthly Updates** record that you want to view.
4) From the **Task Details**, click **Click here** to open the **BP Progress** window.
5) Click **View Graphic** to open the workflow graphic showing tasks steps and links.
6) Click **Close Window** to finish viewing a closed record.

Project Closeout

Lesson Learned Business Process

Purpose

Record experiences that positively and negatively affected a project to establish best practices for ongoing and future projects.

Characteristics

This is a Project level non-workflow business process.

Groups associated with this business process

All Project Users can create records. Project Coordinators and Project Managers can edit records.

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Editing a Lesson Learned Record 462
Viewing a Lesson Learned Record 462

Creating a Lesson Learned Record

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Project Closeout** node.
3) Click **Lesson Learned**.
4) From the BP log page, click **Create**.The Create New Lesson Learned Record form opens. Complete the form according to the following information.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

Lesson Learned tab

General

In this field:	Do this:
Record Number	No action.
Title*	(Required) Enter a title.
Project Number	No action.
Project Name	No action.
Creator	No action.
Creation Date	No action.

In this field:	Do this:
Record Last Update Date	No action.
Status*	Select from the list
Contract Reference	Click Select to open the Contracts window and select a related contract.

Information

In this field:	Do this:
Issues	Enter description.
Reasons	Enter description.
Solution	Enter description.
Recommendations	Enter description.

5) Click **Finish Editing**.

Editing a Lesson Learned Record

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Project Closeout** node.
3) Click **Lesson Learned**.
4) Open the record you want to revise.
5) Click **Edit** and make the necessary changes.
6) Click **Finish Editing**.

Viewing a Lesson Learned Record

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Project Closeout** node.
3) Click **Lesson Learned**.
4) Open the record you want to view.

Project Closeout Business Process

Purpose

Record project closeout information

Characteristics

This is a Project or Shell level non-workflow business process.

Groups associated with this business process

Project Coordinators and Project Managers can create and edit records.

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Editing a Project Closeout Record 464
Saving the Project Closeout Record 464

Creating Project Closeout Record

Create a Project Closeout record in the Tasks log to log your project closeout information.

On the Project Closeout form, specify a title for the record. Select the items that have been completed and specify the date of completion. Click Finish Editing to save the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Project Closeout** node.
3) Click **Project Closeout**.
4) From the BP log page, click **Create**. The Create New Project Closeout Record form opens. (Required) In the **Title** field, enter a title.
5) (Required) From the **Status** list, select an option.
6) Select the **Architectural Punchlist Signoff** check box
7) Click the **Date/Time** icon, select a date to specify the signoff date, and click **OK**.
8) Select the **Civil Punchlist Signoff** check box
9) Click the **Date/Time** icon, select a date to specify the signoff date, and click **OK**.
10) Continue on with checking the completed items and specifying the date for each completed item.
11) When finished, click **Finish Editing**, and click **OK** to complete creating a Project Closeout record.

Editing a Project Closeout Record

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Project Closeout** node.
3) Click **Project Closeout**.
4) Open a closed record.
5) Click **Edit**, change the record, and click **Finish Editing** when finished.

Saving the Project Closeout Record

To save the Project Closeout record

Click either:

- **Finish Editing** to save the form in read-only mode.
  - If the record status is Pending, you can return the record to Edit mode and modify the Upper form and Line Items form fields.
  - If the record status is Closed, the record is permanently read-only.
- **Save** to leave the form in edit mode.

Punchlist Business Process

Purpose

Initiate and confirm/deny a new Punchlist, capture and store information regarding a Punchlist line item. For example, spec section, open and closed dates, issues, and resolution details.

Characteristics

This is a Project or Shell level line items and a workflow. You can create multiple Punchlist records for a project. Punchlist records are stored in the Punchlist business process log in a project.

Groups associated with this business process

- Creation: Project Coordinators.
- Review: Project Managers. All Project Users can be copied.
- Revision: Project Coordinators. All Project Users can be copied.
- Punch List Closeout: Project Coordinators. All Project Users can be copied.

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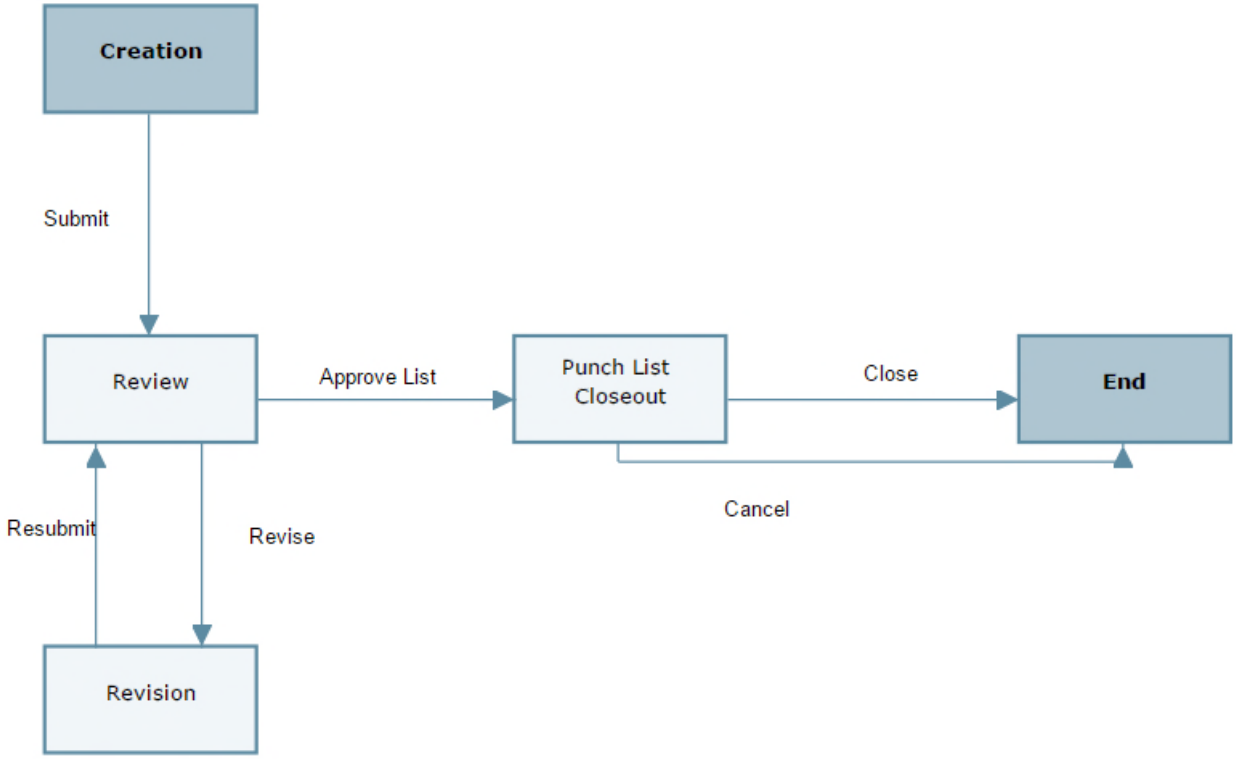
Punchlist Workflow

The following diagram shows the four steps of the Punchlist workflow. The action you take on a step determines the record status on the next step. For example, if on the Revision step you select Resubmit for Approval, the record moves to the Approval step with a record status of Pending. Sending a record to either the Revision step or the Approval step creates a task for the record recipient.



Creating Punchlist Record

Create a Punchlist record in the Tasks log to initiate and accept/reject a new Punchlist record.

On the Punchlist form, specify a title for the record. Add line items for each punchlist item in the Line Item List section.

After completing the Design Change Request form, select an action in the Workflow Actions list to determine the next step in the workflow. Click Send to route the form to the next assignee.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Project Closeout** node.
3) Click **Punchlist**.

4) From the BP log page, click **Create**. The Create New Punchlist form opens. In the **Title** field, enter a title.
5) In the **Line Item List** section click **Add**.
6) Click the calendar icons to specify necessary dates and then choose a priority for the line item.
7) In the **Priority** list, select a value.
8) In the **Spec Section** list, select a section.
9) In the **Issue Category** list, select Open.
10) In the **Location** field, enter the location.
11) In the **Description** section provide details for the line item.
12) In the **Short Description** field, enter description.
13) In the **Est. Schedule Impact (Days)** field, enter a value.
14) In the **Assignee** field click **Select** to select and assignee, click **Add**, click **OK**, and click **OK** to save the line item.
15) In the Action Item Approver field, click **Select** to select and assignee.

> **Note:** You can add multiple line items to a Punchlist record.

16) From the **Workflow Actions** list, select **Submit**.
17) On the **Action Details** tab, click **To**, select and add an assignee, click **Add**, and click **OK**.
18) Click **Send** to route the record for approval and then click **OK**.

Revising Punchlist Record

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:

   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.

   - The Upper Form contains project information, including the record number and title.
     - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Review step.
     - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
     - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) In the **Contract** field click **Select** to select the contract and open.
5) From the **Workflow Actions** list, select **Resubmit**.

6) On the **Action Details** tab, click **To**, select and add an assignee, click **Add**, and click **OK**.
7) Click **Send** to route the record for approval and then click **OK**.

Approving Punchlist Record

1) Go to your project. Ensure that you are in the User mode.
2) Click on **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, and click ⚙ **> Open**. You can also double-click on a task to open it.

   The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
     - The Task Details section displays who sent the record, who can take action on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes. You cannot make changes to the Action form when you are on the Review step.
     - You can add **Task Notes** for the next step, but you cannot view previous Task Notes.
     - If you want to revisit Task Notes from the previous step, you must undo Accept Task via **Actions** > **Undo Accept Task**.
4) From the **Workflow Actions** list select **Approve List**.
5) Click **Send** to conclude the approval process and remove the record from the **Tasks** list.

Viewing Closed Punchlist Record

You can view a closed **Punchlist** record in the **Punchlist** business process log. When the record is at the **End** step, the record is in terminal status which means that the record has been: **Approved, Rejected**, or **Canceled**. You can also open a closed **Punchlist** record to see who has reviewed the record and at which step.

1) Go to your project and ensure that you are in **User Mode**.
2) Expand the **Project Closeout** node.
3) Click **Punchlist**.
4) Select the appropriate line item (a closed Punchlist record) from the list and open the record.
5) From the **Task Details**, click **Click here** to open the BP Progress window. The **BP Progress** window shows that the submittal is on the **End** step.
6) Click **View Graphic** to open the workflow graphic showing tasks steps and links. The current step (**End**) is highlighted.
7) Click **Close Window**, click **Close**, and click **Close Window** to finish viewing a closed record.

Warranties Business Process

Purpose

Record warranty information for equipment, installations, systems, and responsible parties.

Characteristics

This is a Project or Shell level non-workflow business process with line items.

Groups associated with this business process

Project coordinators creates and updates the warranties record.

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Saving the Risk & Issues Record 472

Creating a Warranties Record

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Project Closeout** node.
3) Click **Warranties**.
4) From the BP log page, click **Create**.Complete the form according to the following information.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

Warranty tab

General

In this field:	Do this:
Record Number	No action.
Title	(Required) Enter a title.
Project Number	No action.
Creator	No action.
Creation Date	No action.
Due Date	No action.

In this field:	Do this:
Status	Select from the list

Manufacturer

Enter information about the manufacturer in each field.

Installer

Enter information about the installer in each field.

Equipment Information

Enter information about the equipment in each field.

Warranty Information

Enter information about the warranty in each field.

Line Item tab

1) Click **Add**.
2) Click **Attachment**, click **Add Attachment**, select a source location, and select a document.
3) Complete the fields in the **Warranties Line Item** window.
4) Select a line item status and click **Close**.
5) Click **Finish Editing**.

Revising a Warranties Record

1) Go to your project and ensure that you are in User Mode.
2) Expand the **Project Closeout** node.
3) Click **Warranties**.
4) Open the record you want to revise.
5) Click **Edit** and make the necessary changes.
6) Click **Finish Editing**.

Saving the Risk & Issues Record

- ***To save the Risk & Issues record***

Click either:

- **Finish Editing** to save the form in read-only mode. Regardless of the record status, you can click the **Edit** button to return the record to edit mode.
- **Save** to leave the form in edit mode.

Running a User-Defined Report

See the ***Reports*** (on page 27) section for additional Information.

To run a user-defined report:

1) Open the project or company workspace.
2) Navigate to the **Reports** log, and click **User-Defined**. The User-Defined Reports log opens.
3) Select a report in the log and click the **Open** button. The User-Defined Report window opens.
4) Complete the tabs as follows:
   - **Query tab:** The query has already been set up. However, at the bottom of this tab, choose the format in which you want to run the report. The report format options are:
     - **HTML**: Displays the report in the standard format in a browser window.
     - **CSV**: Formats the report in an exportable CSV format, usually in Microsoft Excel or another application you have set up for this format. You will be prompted to save the file or open it.
     - **Excel**: The report opens in Microsoft Excel format in the browser window.
     - **PDF**: Opens Adobe Acrobat Reader and displays the report in PDF format.
     - **XML**: Generates the output in XML format. Before the results are generated, a confirmation window will open, giving you the option to save the XML file to your local machine (click **Save**), or display the results in a pop-up browser window (click **Open**).

     On the Query tab, you can also choose to save report results somewhere in Unifier. Under the **Save Report Location**, you can choose to save a PDF or XML report in Unifier. You can also save any report in the Document Manager. To do so, click the **Select** button beside the **Location** field. A Select Target Location window opens, where you can specify the folder in the Document Manager where the report should b e saved.
   - **Shells tab**: Ignore this tab. The report will include all the projects in the All Projects shell, except inactive projects.
   - **Notes tab**: You can enter report notes that will be included only on the current report results to be generated, and will not be saved or generated in any subsequent report results.
5) Click **Run** to generate the report.

   PDF files will open in Acrobat Reader, from which you can save the file to your local drive by clicking **File** > **Save**. All other file formats will open in a pop-up browser window, where you can click **File** > **Save** to save the file to your local drive.

Viewing Custom Reports

To view custom reports in the User Mode navigator:

1) Navigate to the **Company Workspace** tab in Admin mode.
2) Expand the **Configuration** node and select **Custom Prints and Reports**.
3) From the **Custom Prints and Reports** log, select a custom report.
4) From the **Tasks** toolbar, click **Status** and select **Published**.

To assign user permissions to view the custom report:

1) Navigate to your project in Admin mode.
2) Click **Access Control**.
3) Expand the **User Mode Access** node and then expand the **Reports** node.
4) Select a custom report to open it.
5) Click **Add**.
6) From the **Permission Settings** section, select the **View** check box.

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